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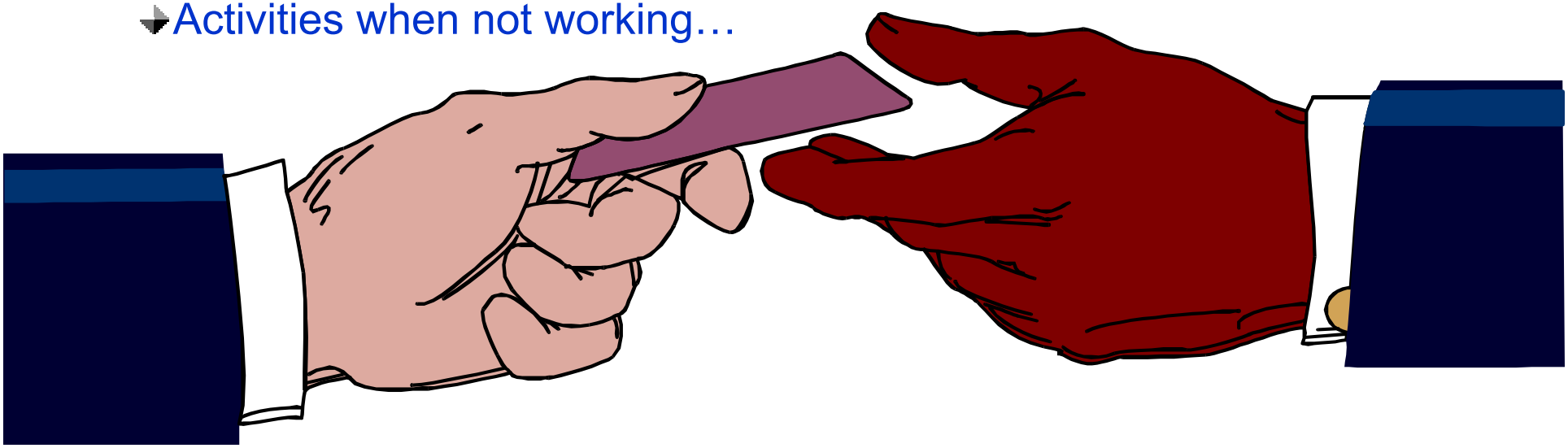
Introduction

Please share:

- Current activities
- Knowledge of ITIL and/or tooling in this area
- Reason for attendance
- Expectations
- Activities when not working…



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AGENDA
Application Coordinator

Day 1

- Introduction to **hp OpenView service desk**
- User Console
- Administrator Console

1

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AGENDA
Application Coordinator

Day 2

- Administrator Console (continued)
- Technical Presentation of **hp OpenView service desk**

2

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AGENDA
Application Coordinator

Day 3

- Organization Management
- Configuration Management
- Helpdesk Management
- Problem Management

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AGENDA
Application Coordinator

Day 4

- Change Management
- Service Level Management
- Data Exchange

4

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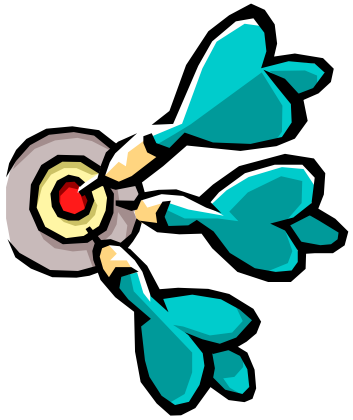
Objectives

At the end of this class you should:



- Have a basic understanding of the relevant IT Service Management processes
- Understand the functionality of **hp OpenView service desk**
- Know the underlying technology of **hp OpenView service desk**
- Be able to partner productively with implementation consultants
- Be able to manage **hp OpenView service desk** in your organization, including user management and customization

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hp OpenView, Amsterdam

For product information, go to the official hp OpenView service desk site:

http://openview.hp.com/products/sdesk/index.html

For support, manuals, patches, knowledge bases, FAQs, known errors, training, etc., go to HP OpenView eCare:

http://support.openview.hp.com

For resources and forums, go to the IT Resource Center:

http://itrc.hp.com or **http://forums.itrc.hp.com**

Service Desk Newsletter:

Send email message to **servicedesk_news@hp.com**

Subject: SUBSCRIBE (UPPERCASE)

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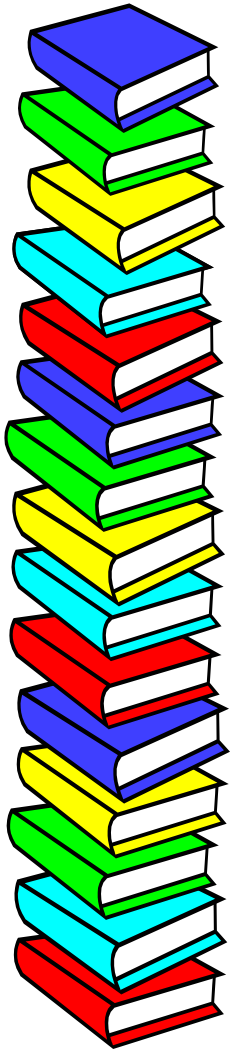
ITIL



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What Is ITIL?

- **I**nformation **T**echnology **I**nfrastructure **L**ibrary. (OGC)
- Collection of books that serve as a complete “best practices” manual for IT service provision; no methodology!
- ITIL Certification on three levels
- Systematic and practical method for optimizing the management of your IT environment/infrastructure
- Effective IT means:
  - running and maintaining existing systems
  - developing new systems
  - keeping IT services in line with changing business requirements

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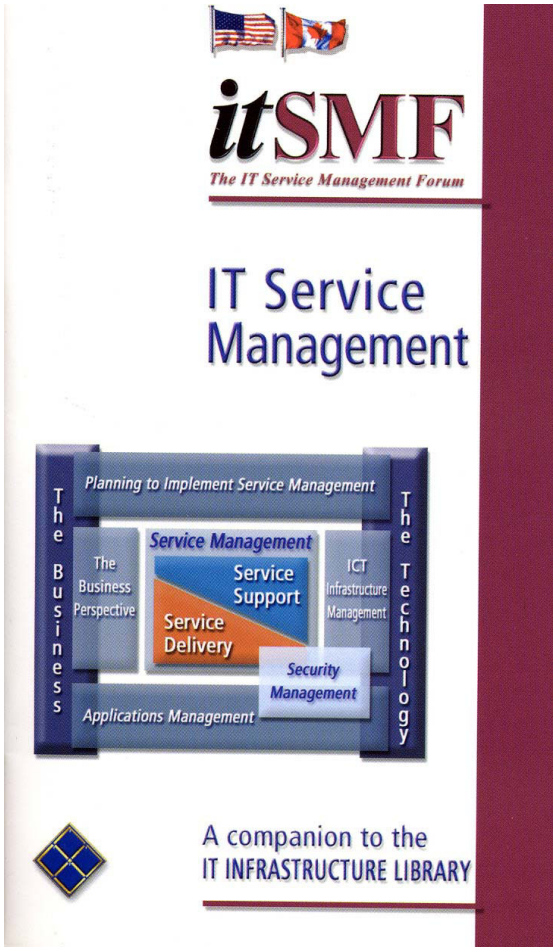
Advantages of **ITIL** ~~Methodology~~

Most important advantages

- ✓ People, processes, and infrastructure
- ✓ A cookbook for IT service provision
- ✓ Modular implementation
- ✓ “Best practices” approach rather than “reinventing the wheel”
- ✓ “Public”ware
- ✓ ISO9002 certification for IT
- ✓ Used by over 10,000 large industry-leading companies



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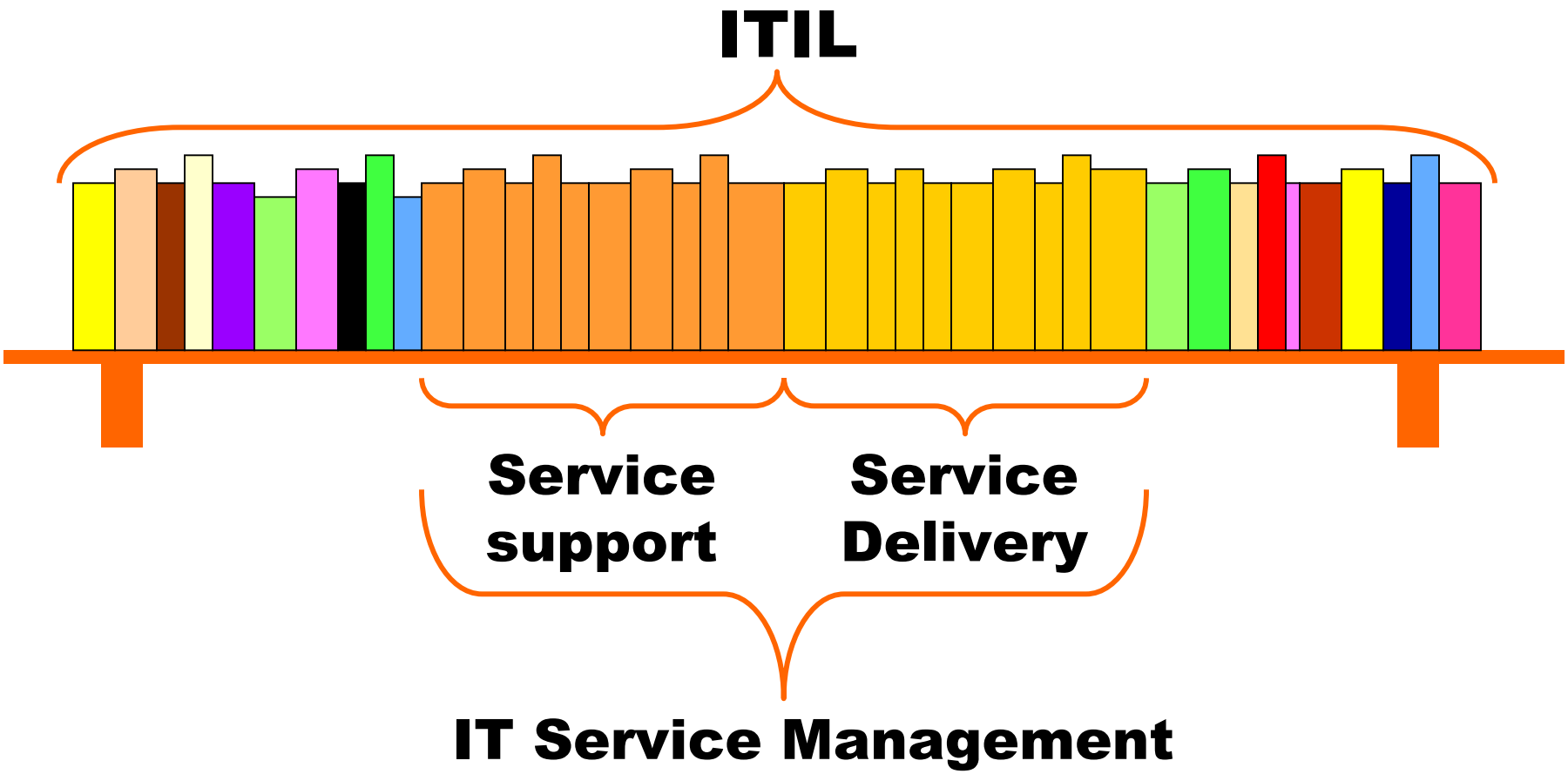
Relation between **ITIL** and **ITSM**



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Two Main Sets of Processes

IT Service Support set

- Service Desk
- Incident Management
- Problem Management
- Change Management
- Configuration Management
- Release Management

IT Service Delivery set

- Service Level Management
- Capacity Management
- Financial Management
- Availability Management
- Continuity Management

=

IT Service management

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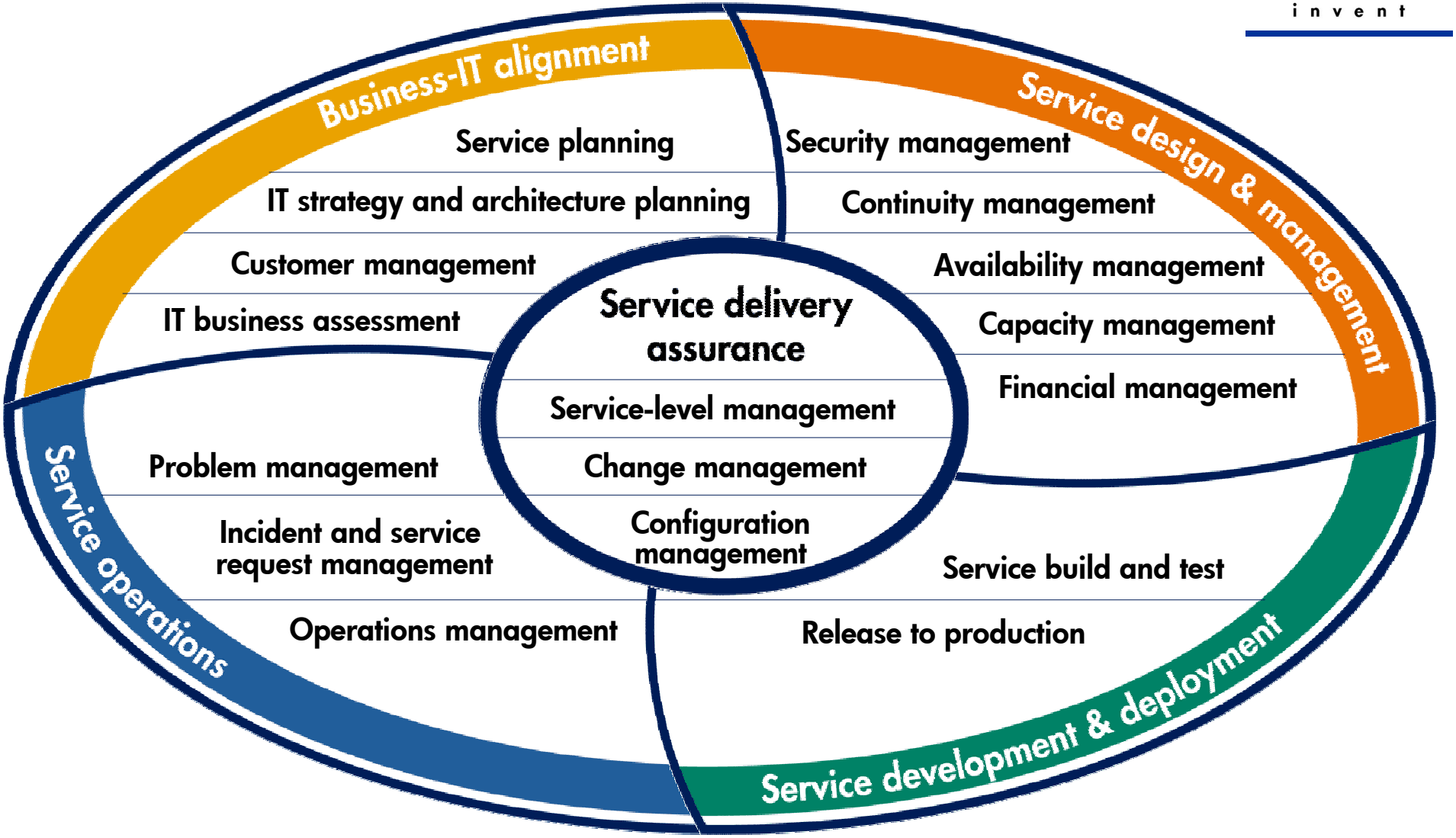
The HP IT Service Management Reference Model



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Why Service Desk?

hp OpenView service desk is a software tool to automate your IT Service Management processes in your Organization.

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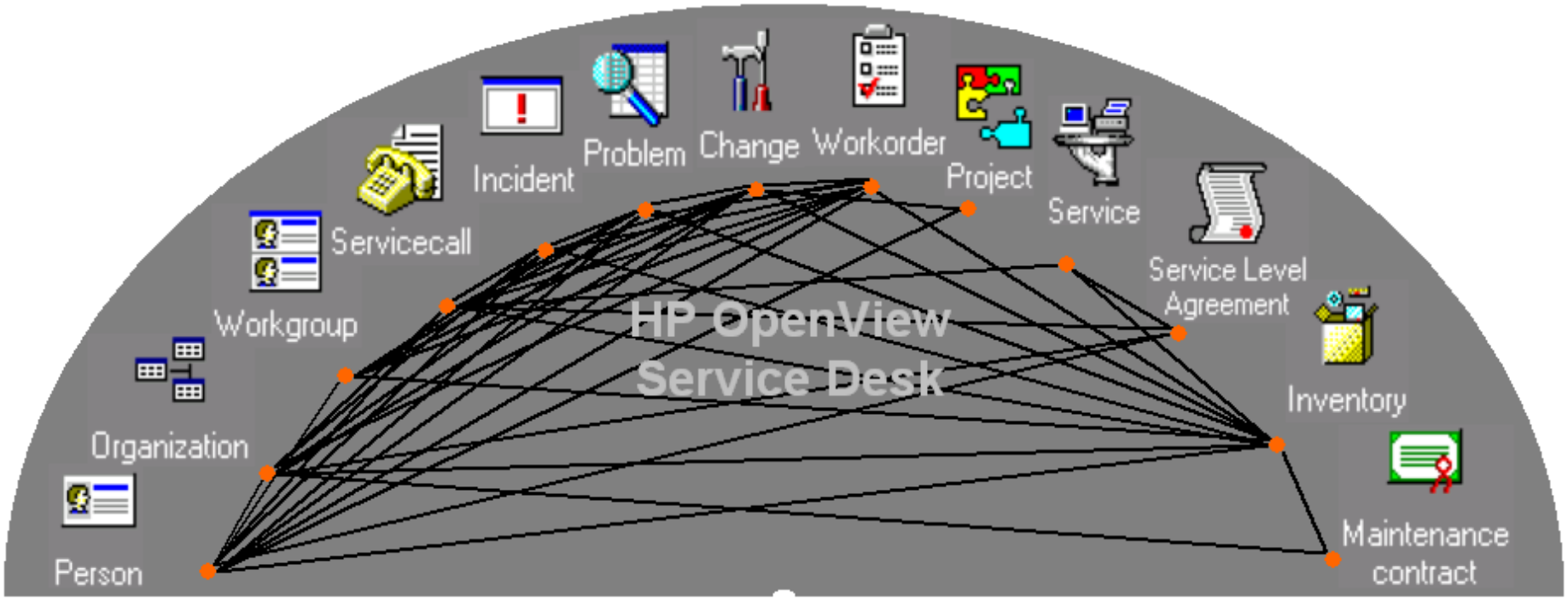
Service Desk Product Areas



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Service Desk Definitions

Item

- Service call, Incident, Problem, Project, Change, Work order, CI, Maintenance contract, Person, Workgroup, Organization,…

Form

- A customizable manifestation of an item, defines the lay-out of data in a record

Template

- A form with defaults filled in (e.g. “Reset Password”) on which a record can be based

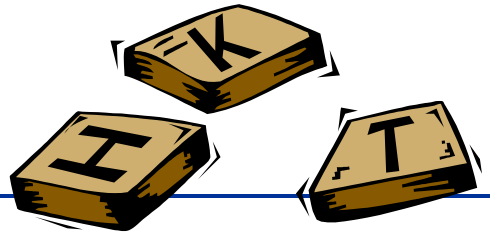
Record

- An actual, real-life service call, CI, etc.…

View

- A way of looking at records

IMPORTANT



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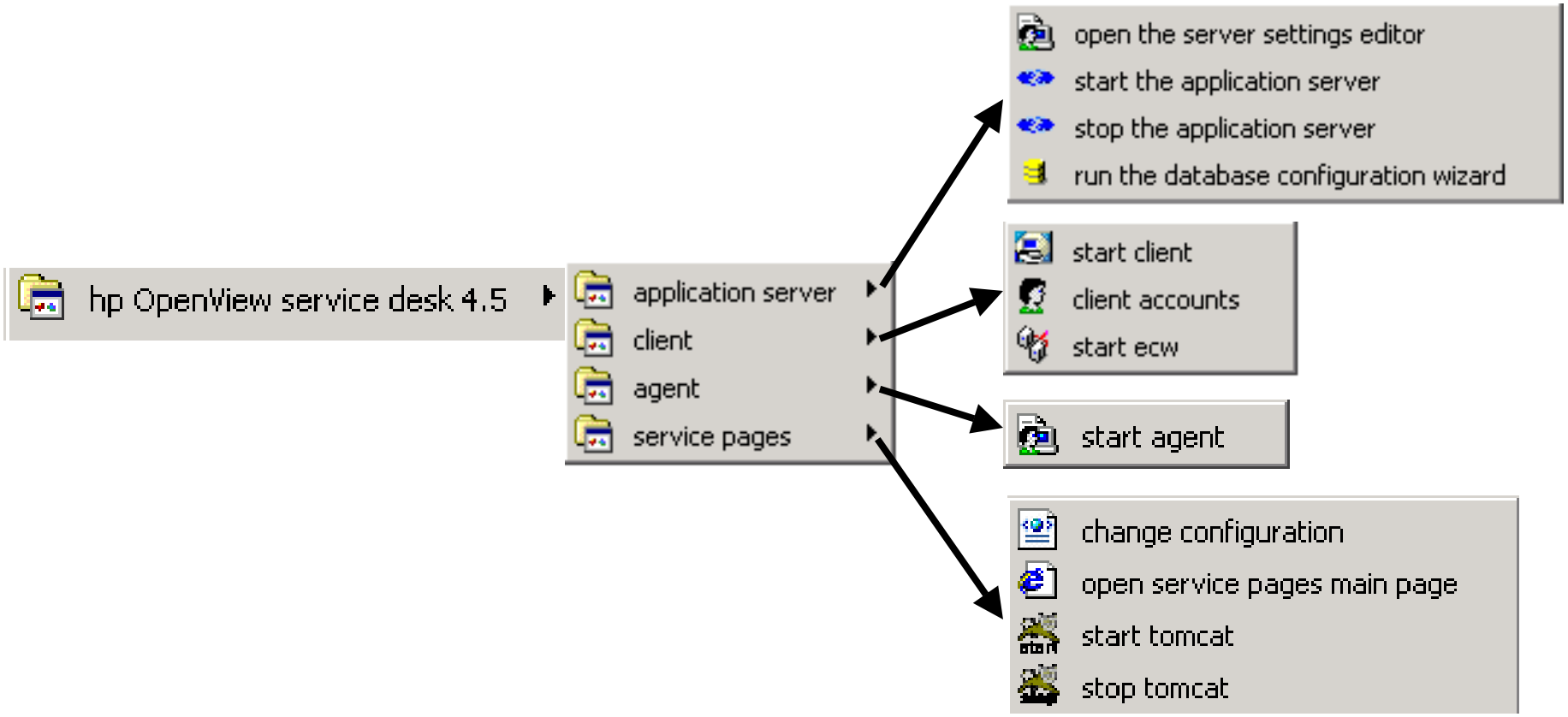
Menu Orientation



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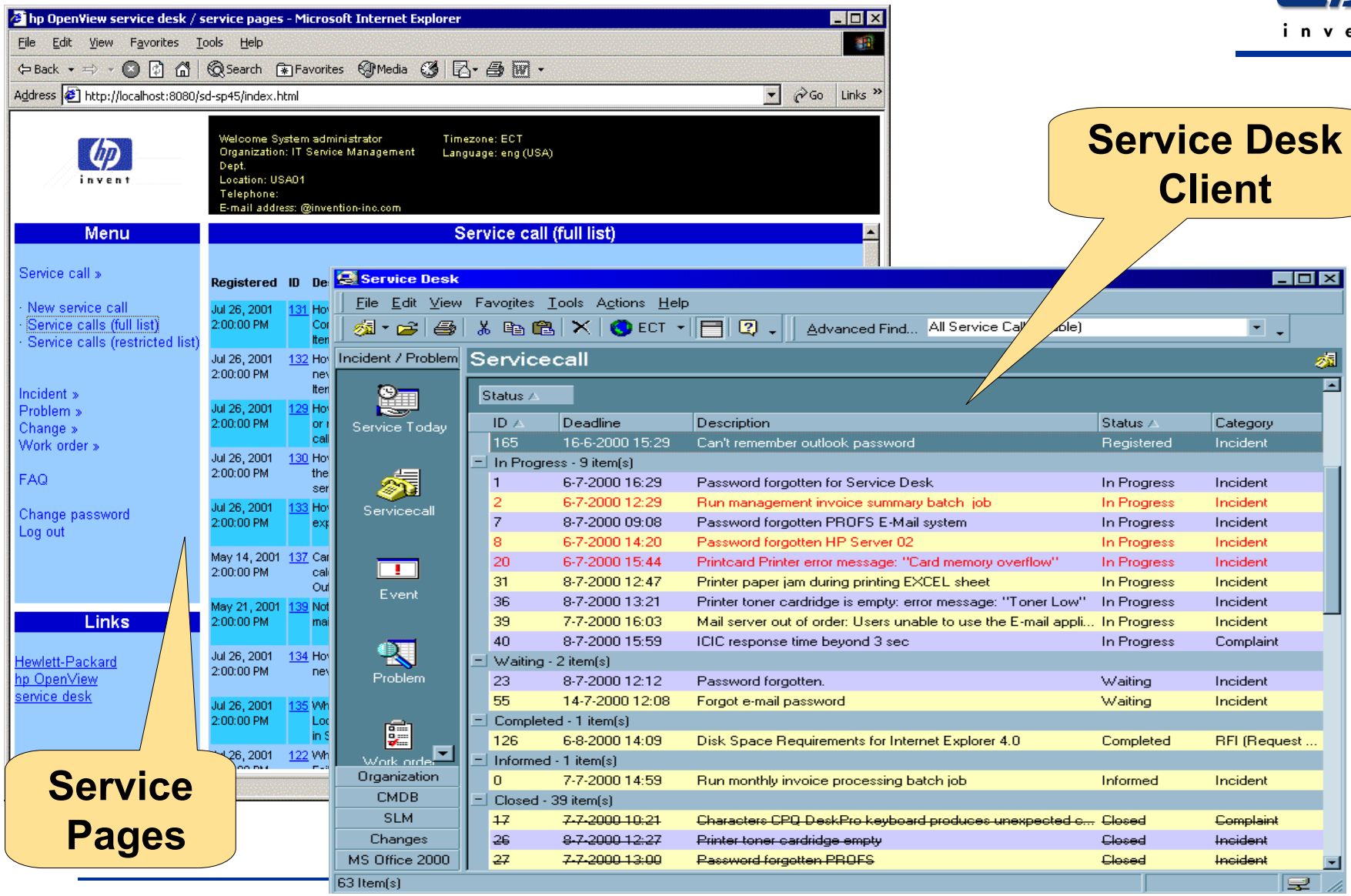
Sneak Preview



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Implementation assistance

Need assistance implementing hp OpenView service desk?

- **HP and partner consultants offer implementation services**
- **“HP ITSM best practices for HP OpenView Service Desk 4.5”**

Contact your hp representative or partner

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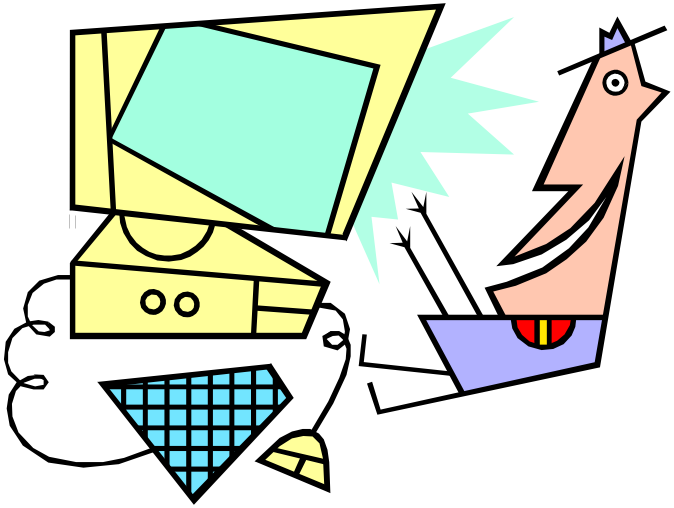
User Console



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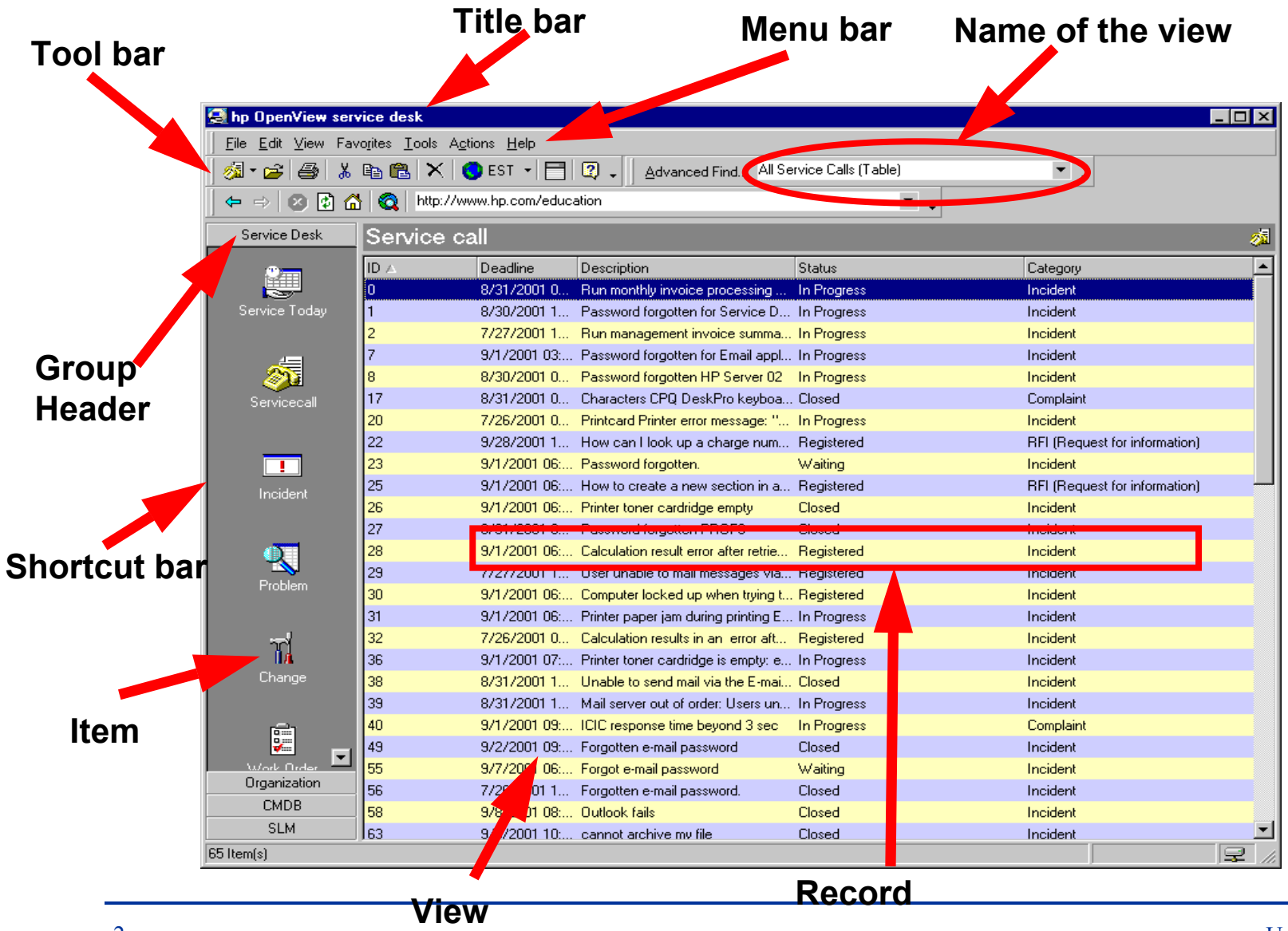
Overall Layout



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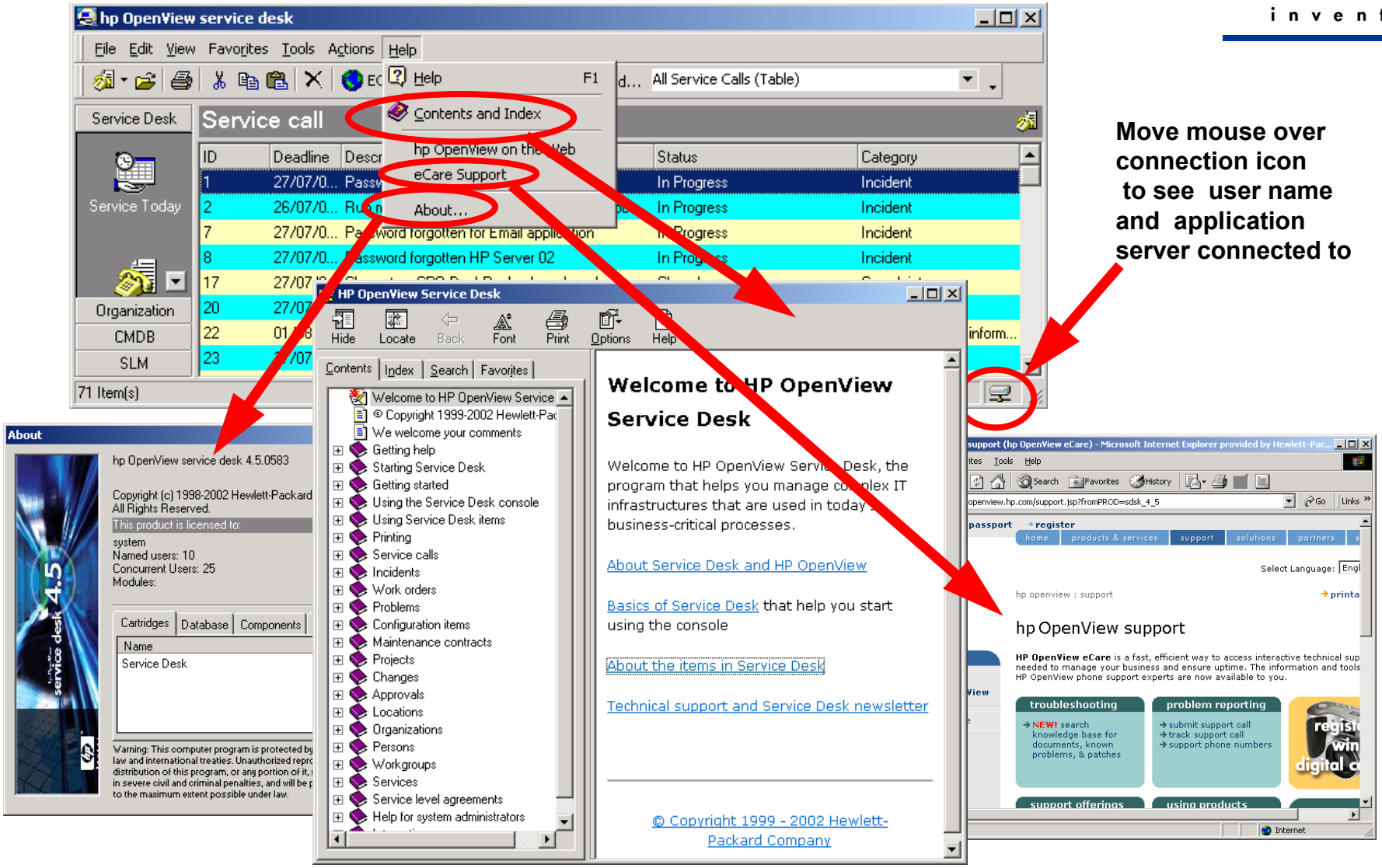
Help!



Move mouse over connection icon to see user name and application server connected to

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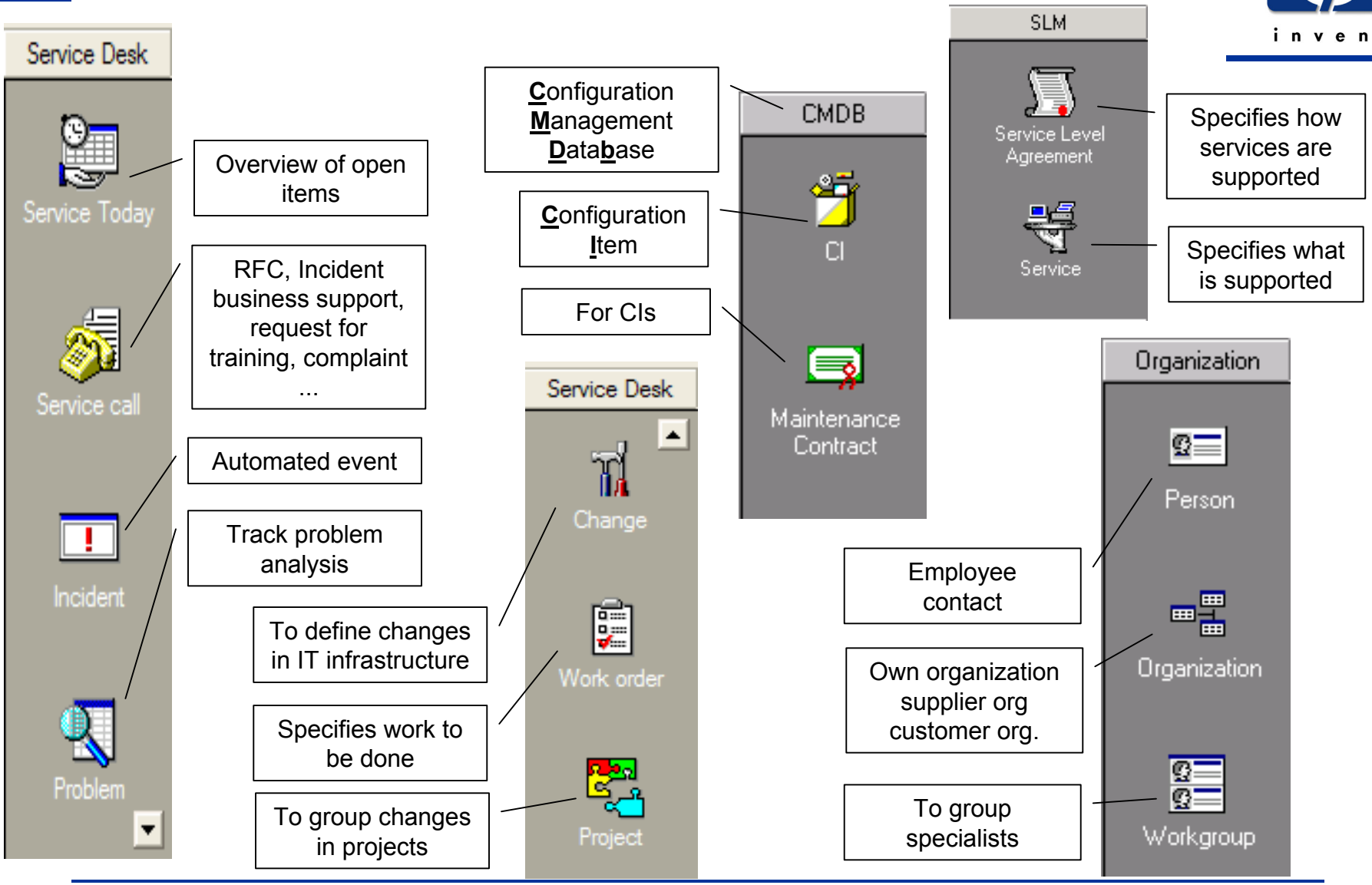
The items on the Shortcut Bars



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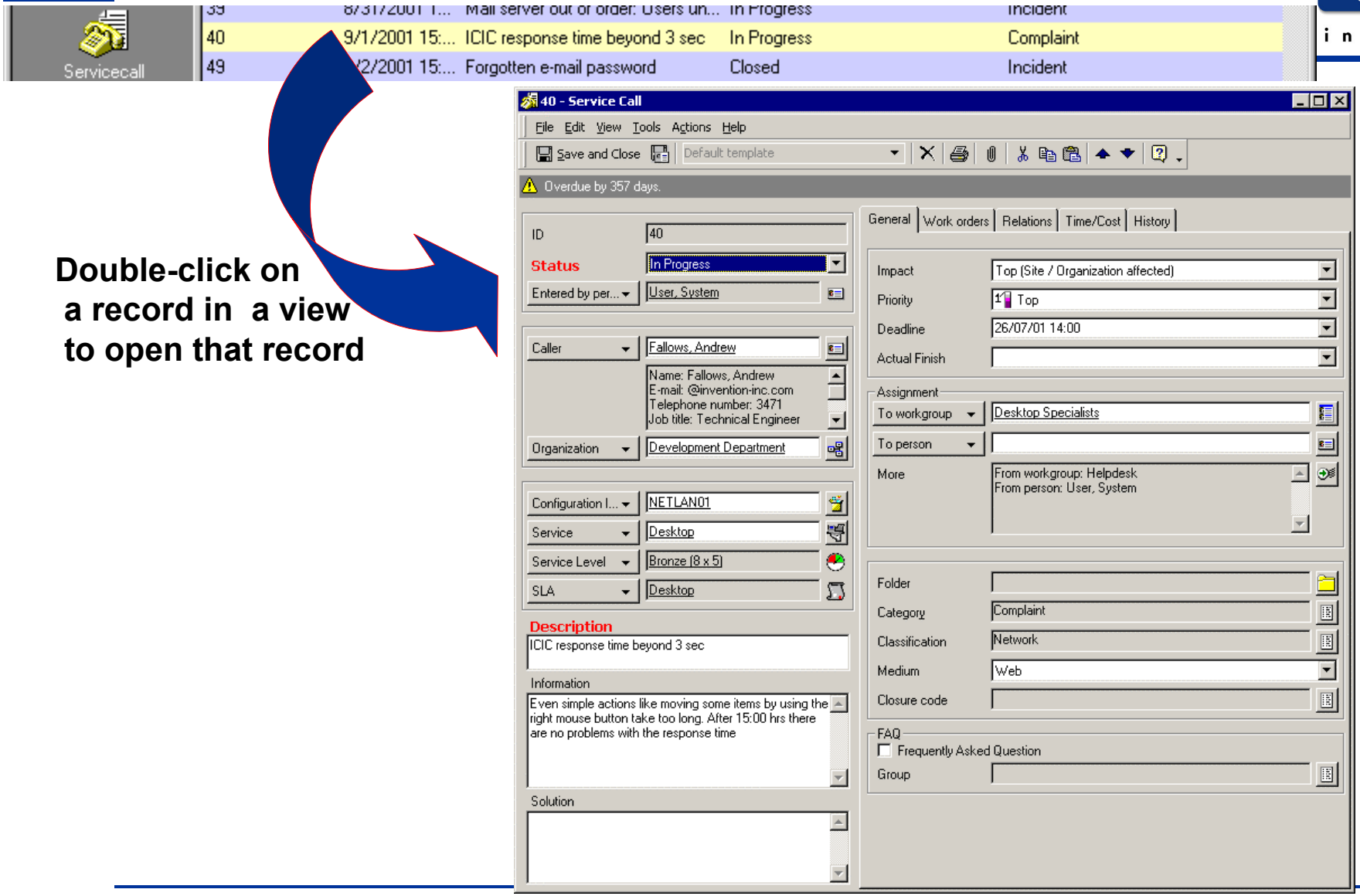
A Record



Double-click on a record in a view to open that record

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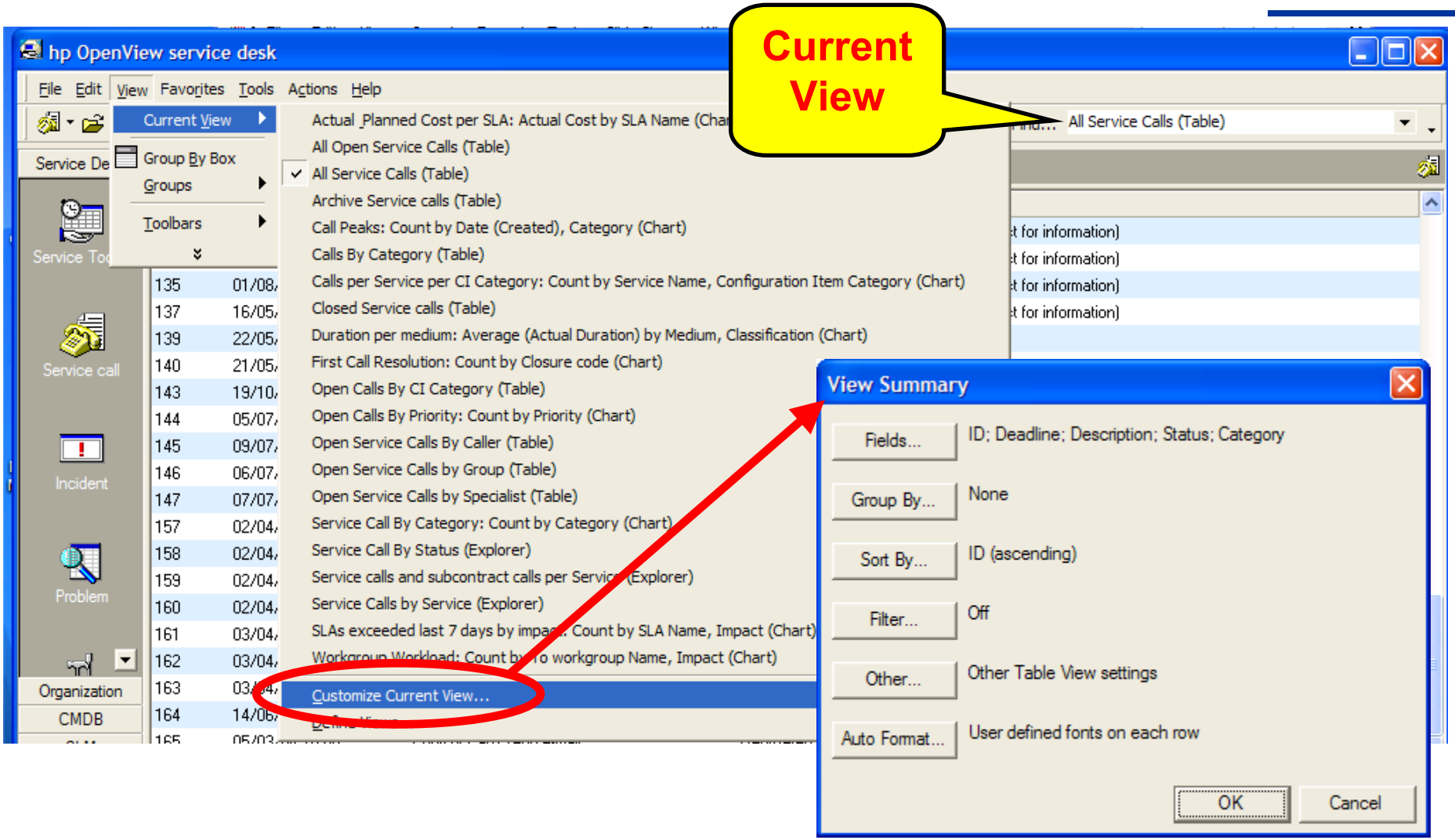
Customizing the Current View



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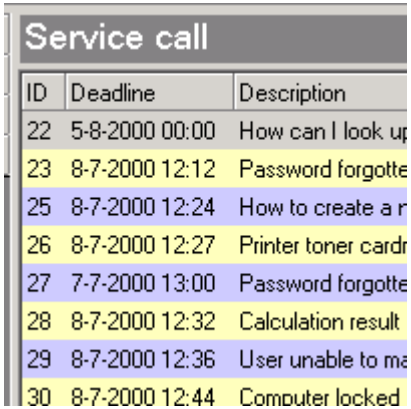
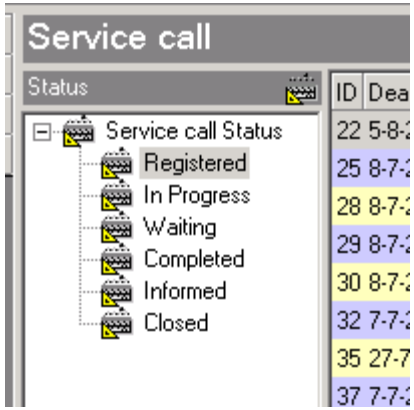
Six Types of Views

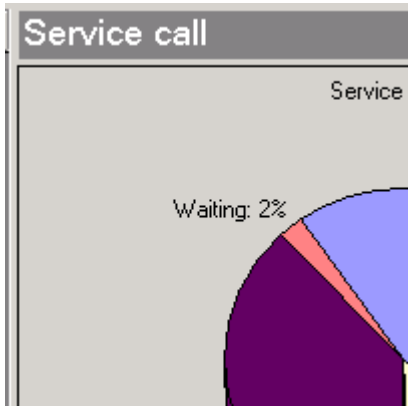
Table



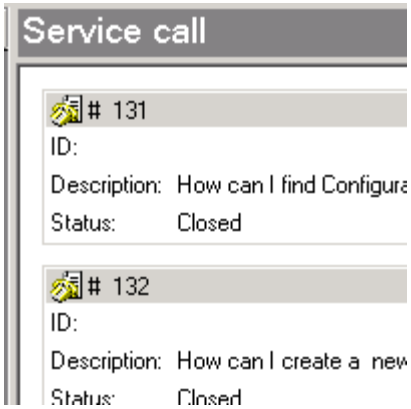
Explorer



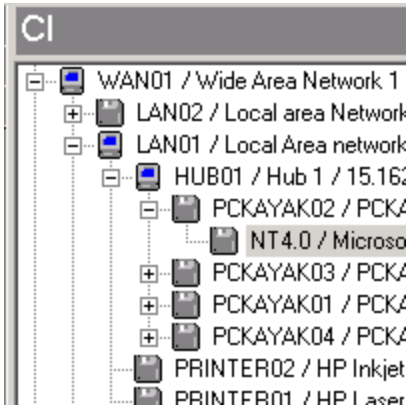
Chart



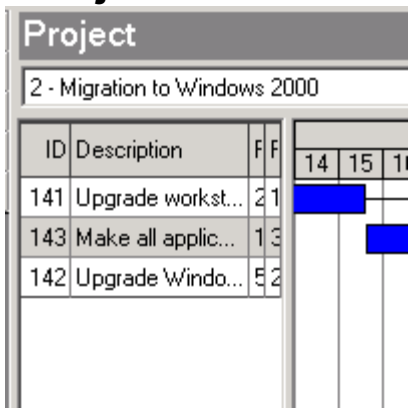
Card



Tree



Project



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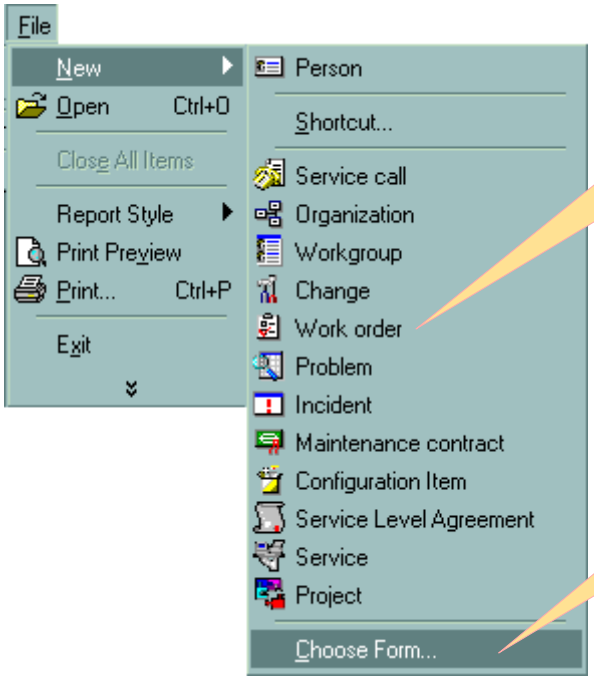
Setting Defaults (1 of 2)



Setting default template

Setting default form

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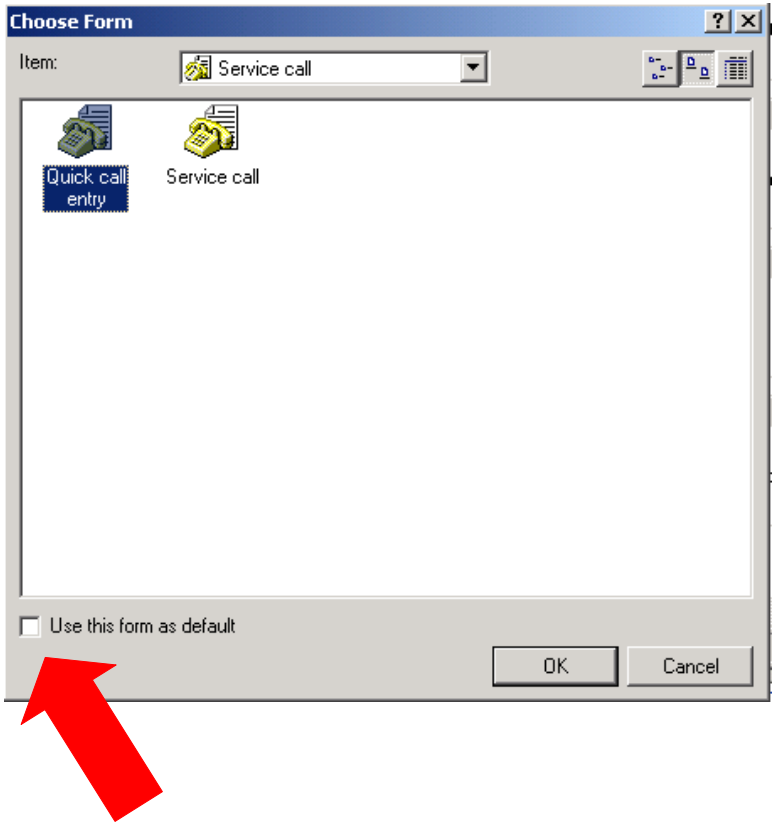
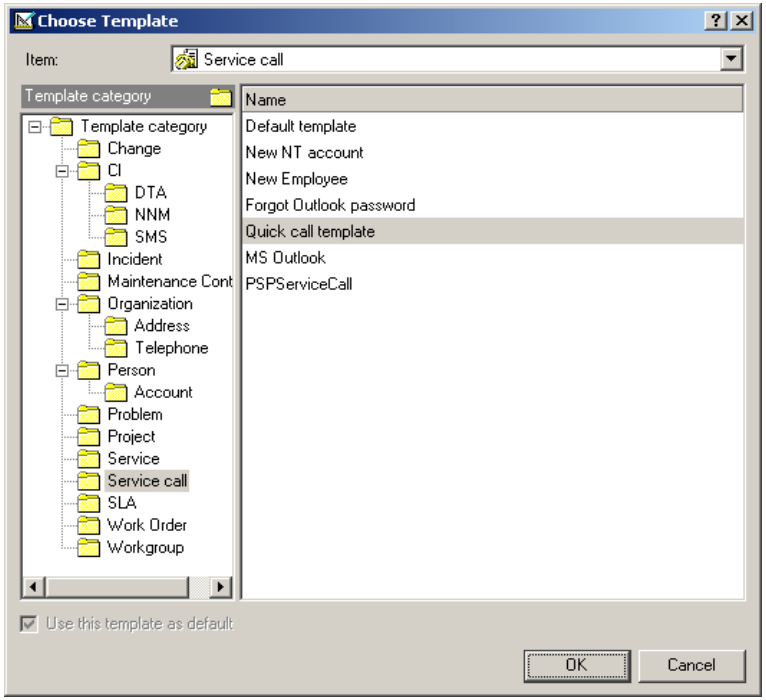
Setting Defaults (2 of 2)

Forms



Templates



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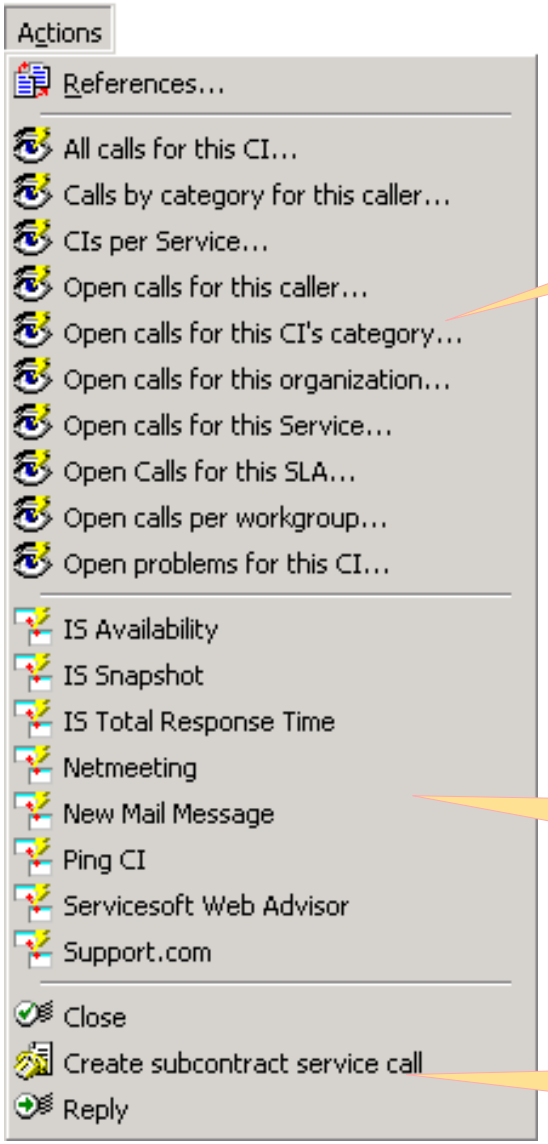
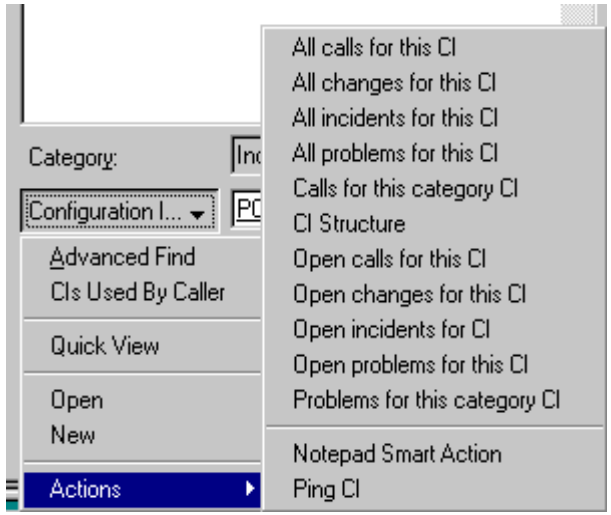
Actions



Overview actions: views of SD data in context



Smart actions: launch other applications with SD data as parameters

System actions (no modifications possible)

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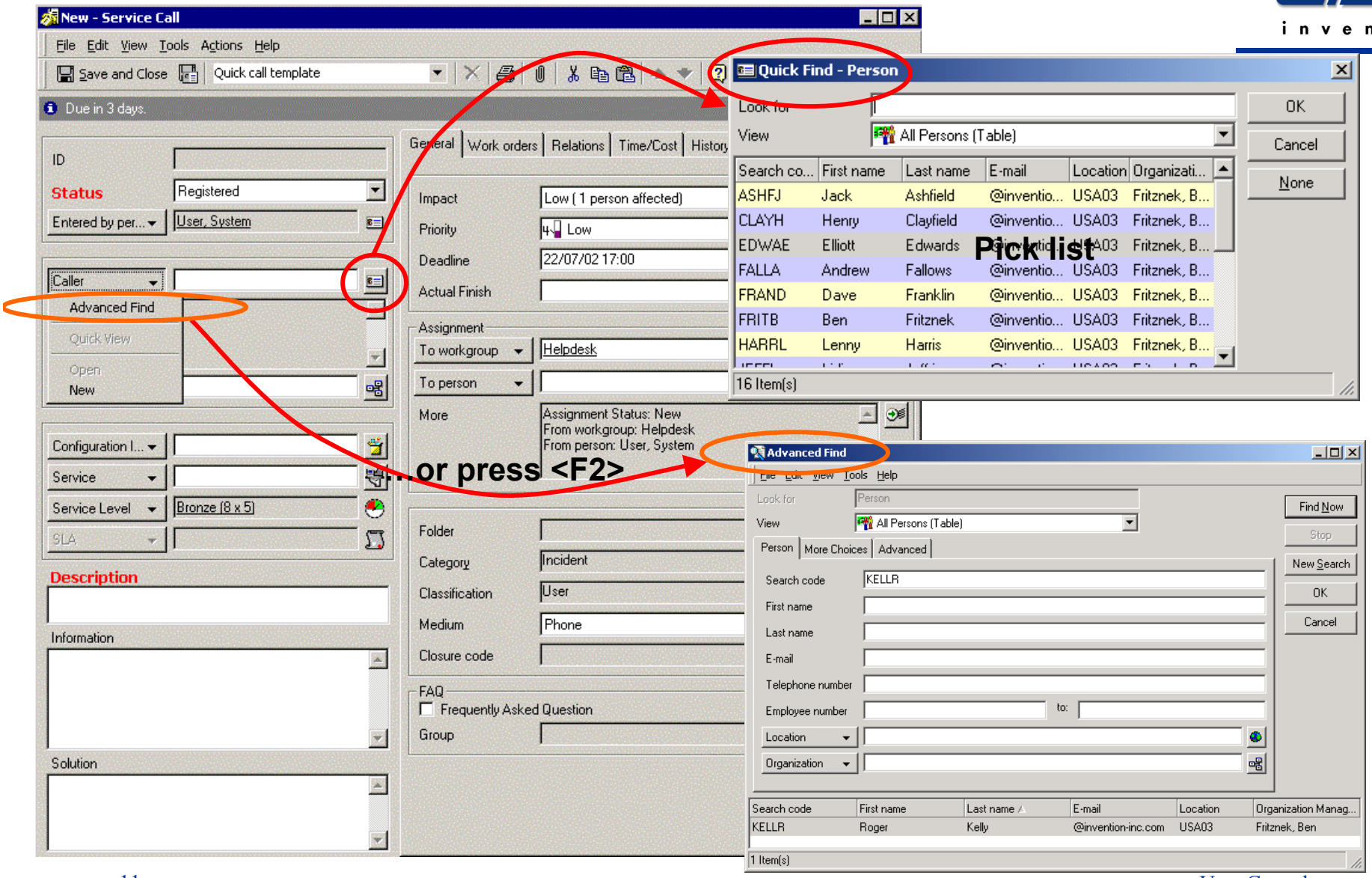
Quick Find versus Advanced Find



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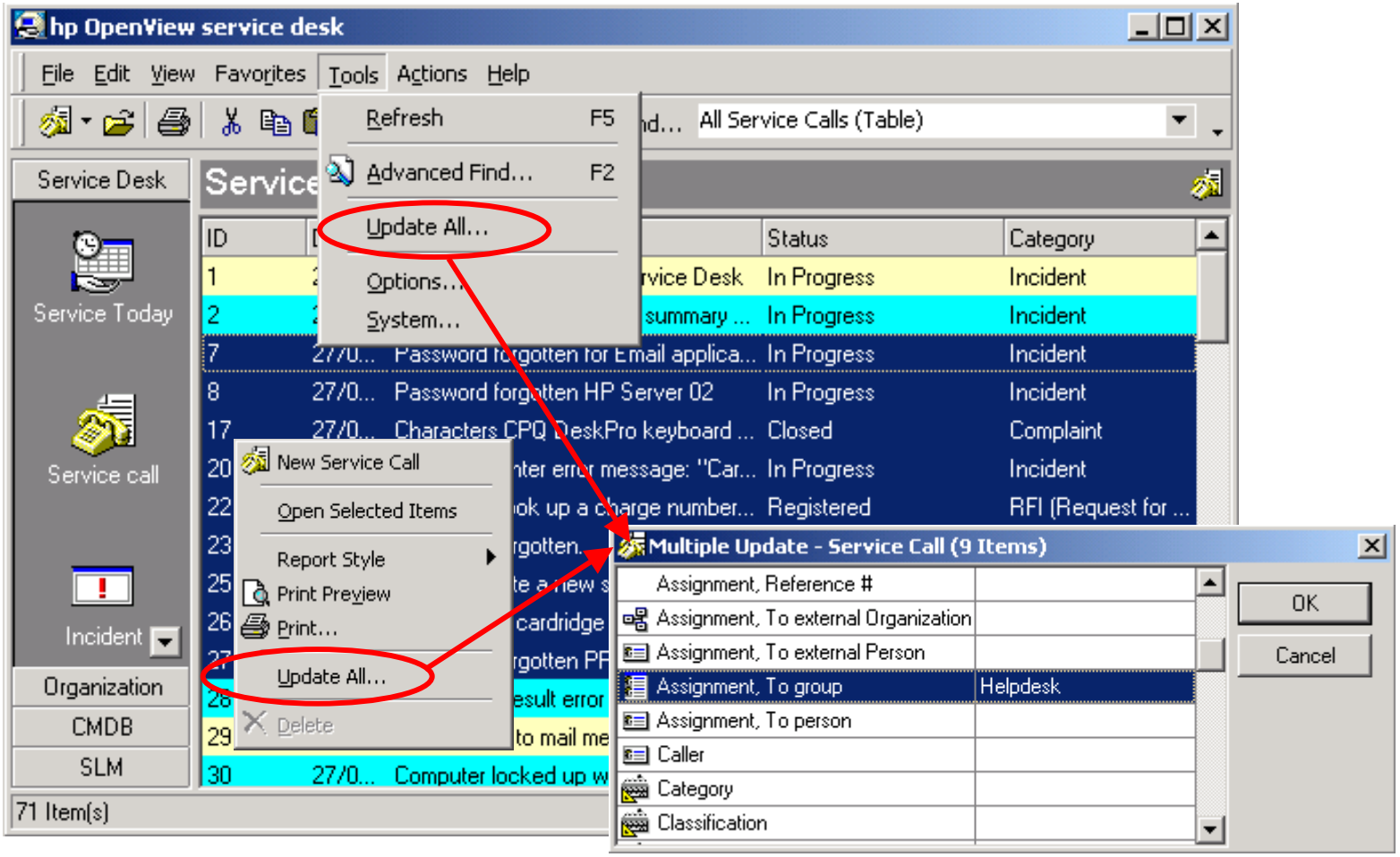
Multiple Update



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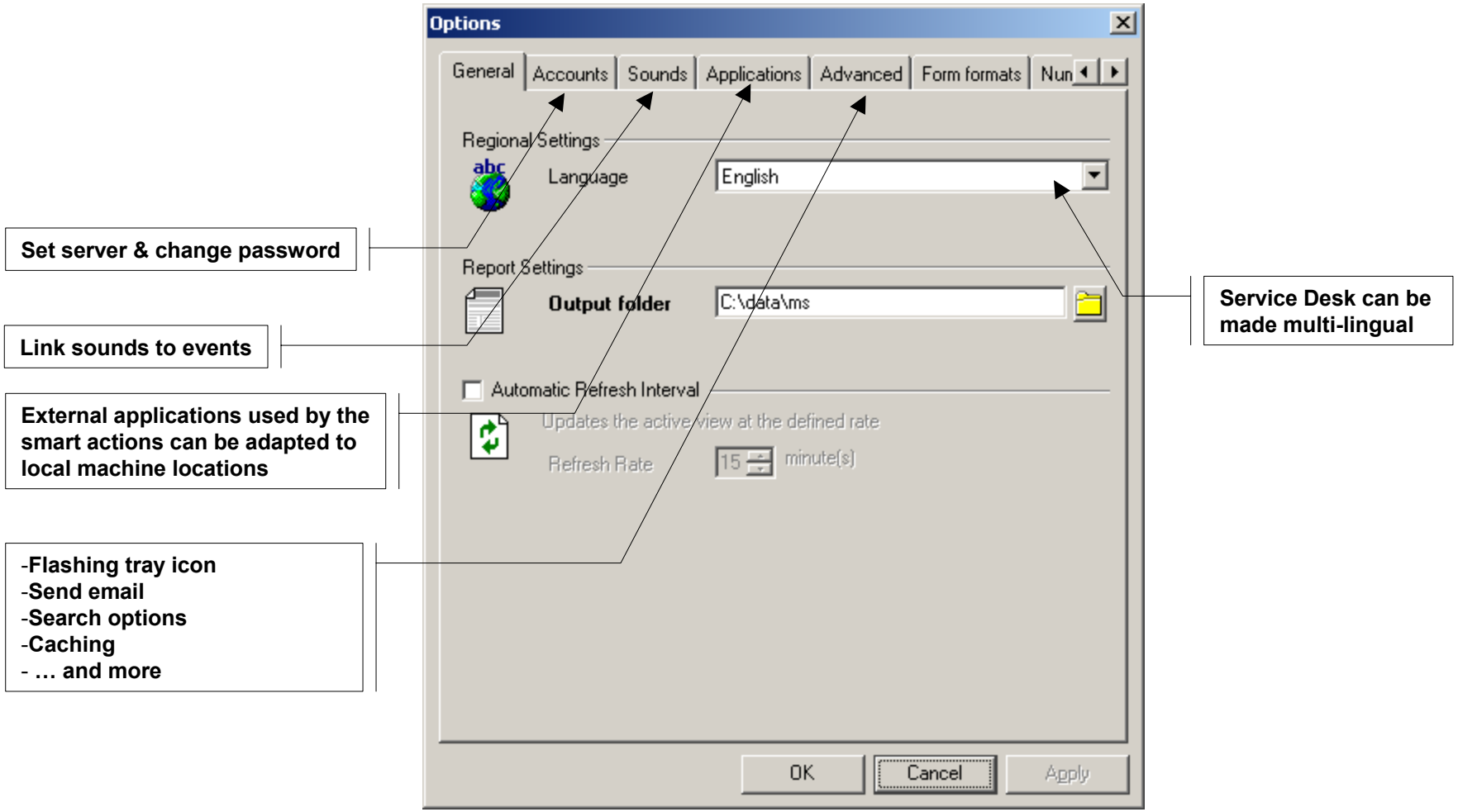
Setting User Options (1 of 2)



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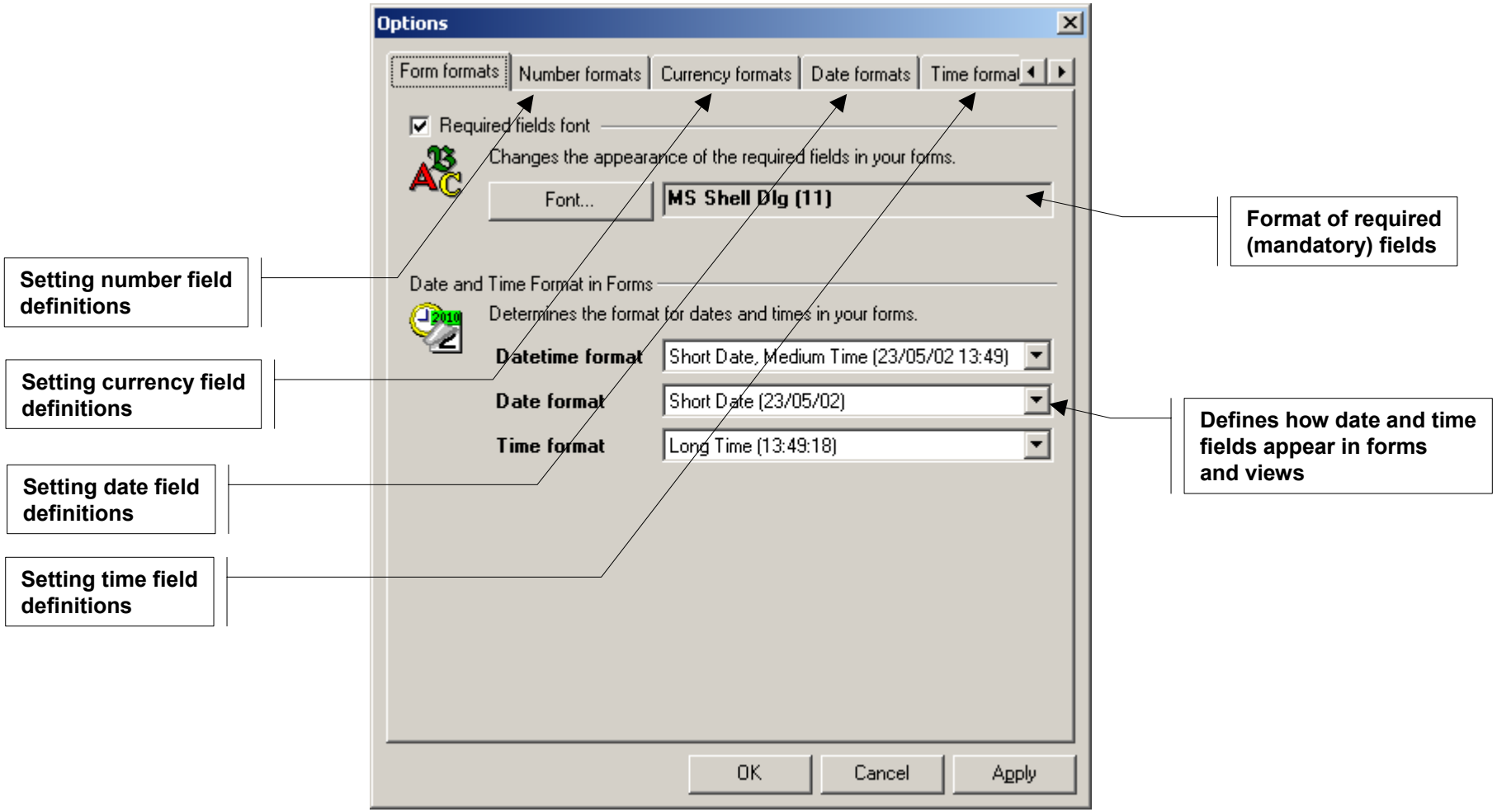
Setting User Options (2 of 2)



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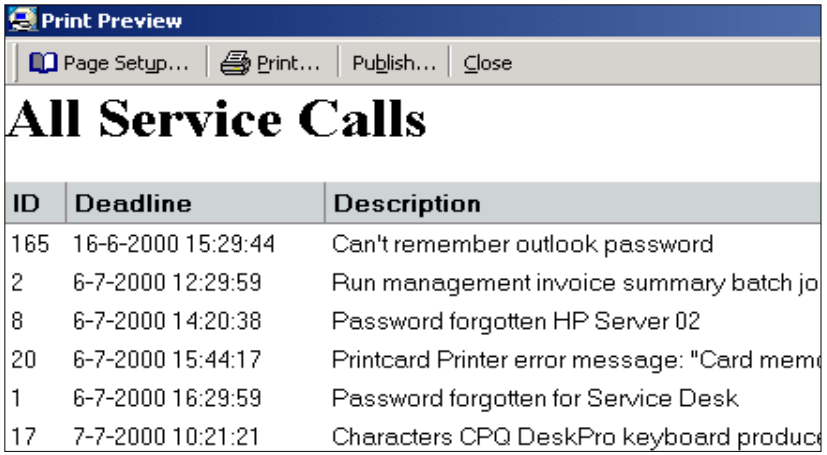
Reporting from views

OPTION 1: internal

- Select a view
- Select a report style via

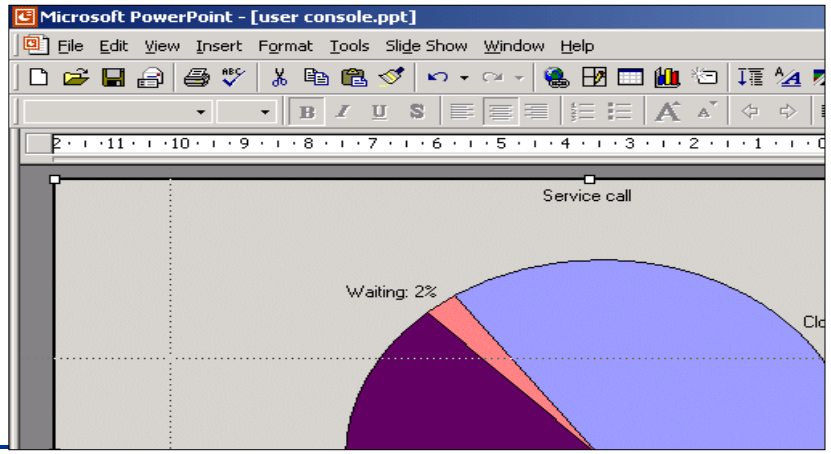
  File->Report Style
- Preview the report via

  File->Print Preview
- Print the report within Print Preview window



OPTION 2: external

- Select a view
- Copy & paste it in another application (like MS PowerPoint or MS Excel)



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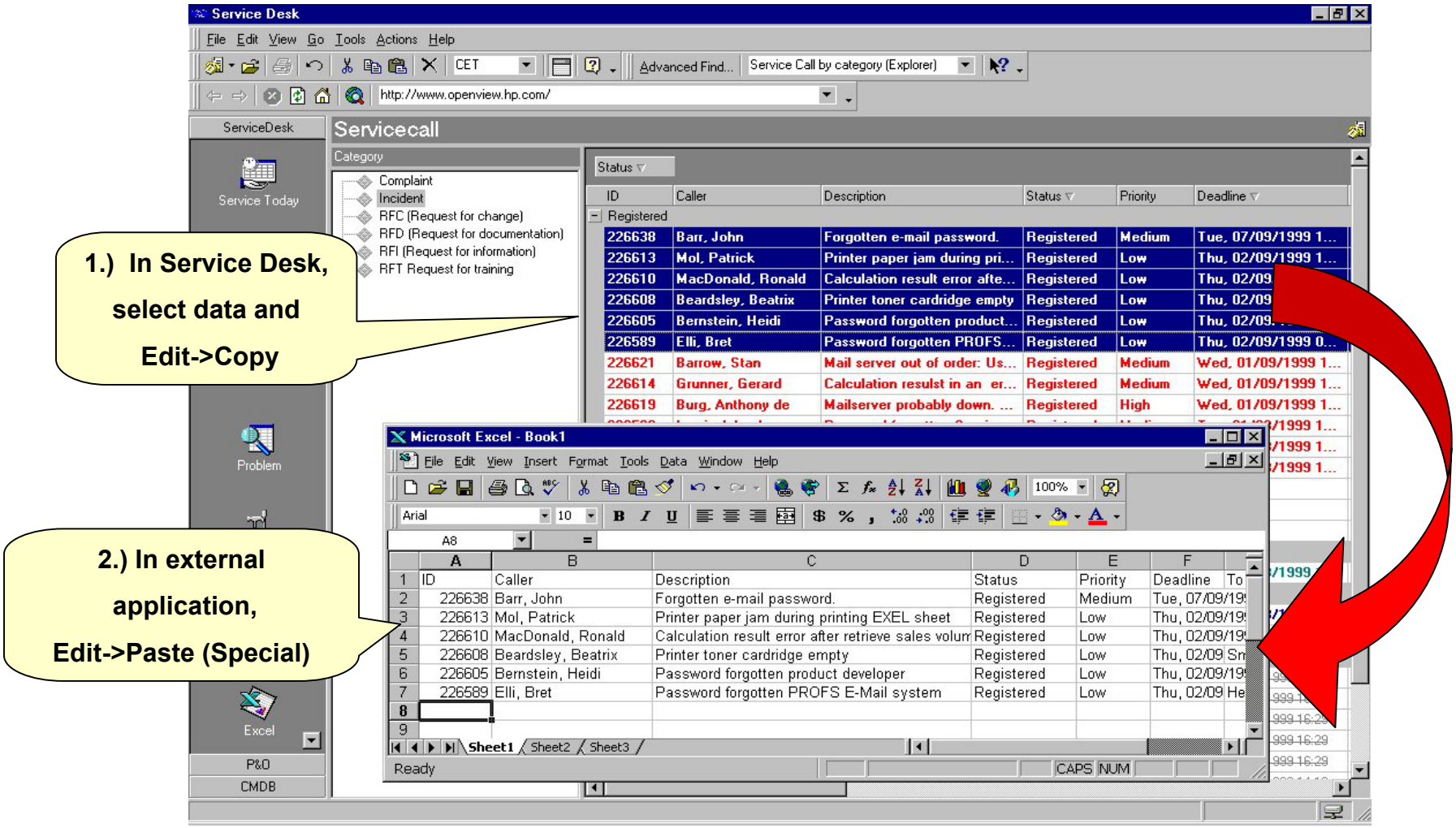
Reporting from views (MS Excel Example)



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Reporting from Analyzed Data (1 of 3)

- Benefits & characteristics
  - Reduces history analysis
  - Collect information that is otherwise ‘hidden’ in the history lines
  - Can be used for ad hoc reporting
  - Interesting information for further analysis
  - Further analysis in reporting tool
  - Collected per information type, for example:
    - Who solved the item?
    - When was it first accepted?
    - When was it solved?

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Reporting from Analyzed Data (2 of 3)

- Analyzed data gathers information from items on:

Passed by	**List of departments or persons who worked on but did not solve the item.**
Solved by	**Department or person who solved the item (put to an arbitrary status).**
Pickup time	**The time it took between creating the item and accepting the item by a support group.**
Solution time	**The time it took the support organization to solve the item (put to an arbitrary status).**
Total work time	**The difference between the moment the item was created and the last time a status was selected.**
Overall work time	**Total work time of the item and its related work orders.**
Assignment time	**The time a selected department or person was assigned to an item.**
Status time	**The time the item was in a given status, or in one of a list of status codes.**

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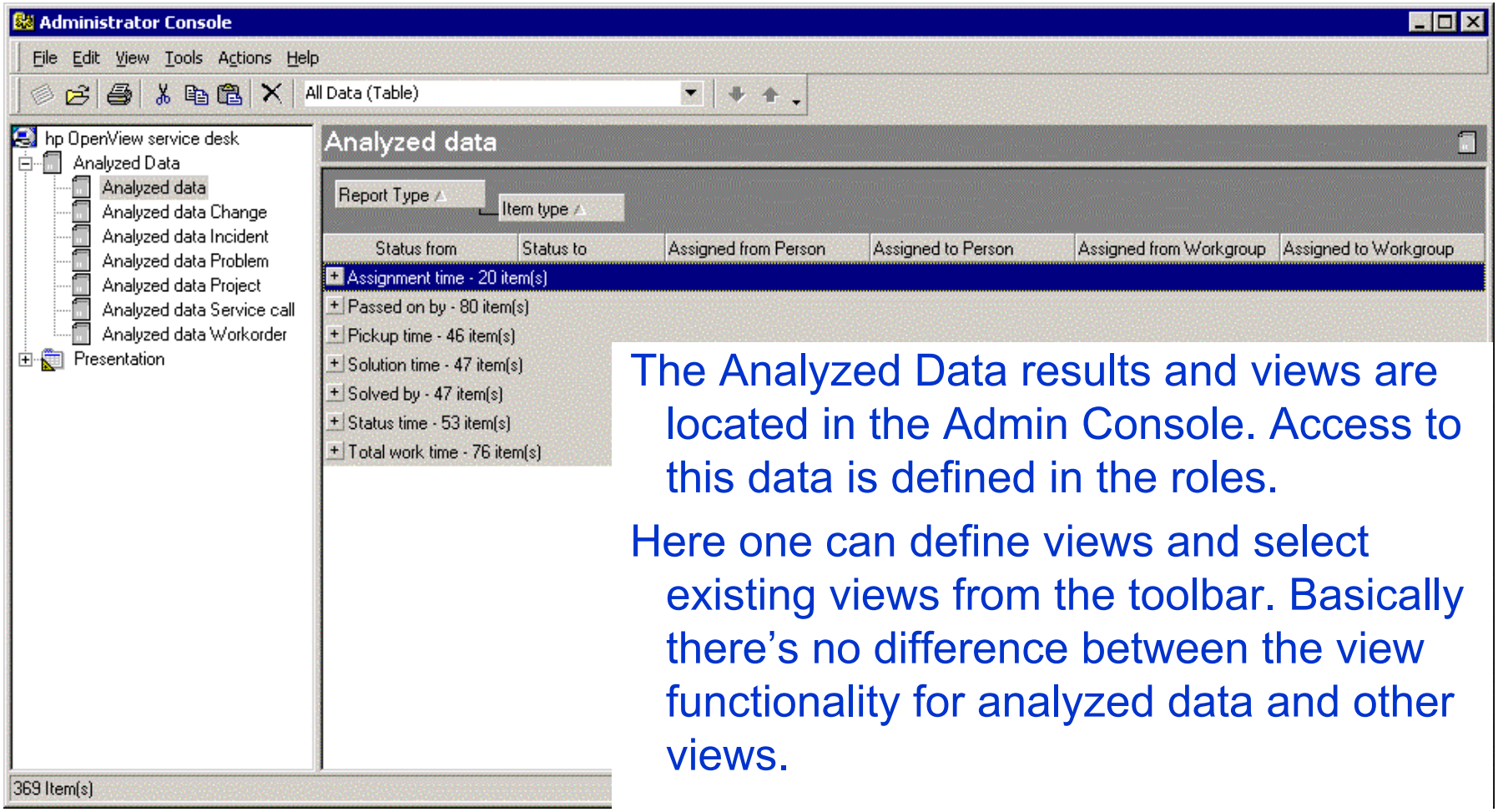
Reporting from Analyzed Data (3 of 3)



The Analyzed Data results and views are located in the Admin Console. Access to this data is defined in the roles.

Here one can define views and select existing views from the toolbar. Basically there's no difference between the view functionality for analyzed data and other views.

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Service Today

- Personal or group TO DO list

Service Desk

File Edit View Favorites Tools Actions Help

Advanced Find... Service Today For Workgroup (Table)

Incident / Problem

Service Today

Servicecall

Organization

CMDB

SLM

Changes

MS Office 2000

Service Today (Filter Applied)

Item type

ID	Item type	Description	Assign...	Assign...	To person	Deadline
Incident - 5 item(s)						
1...	Incident	CPU bottleneck detected. CPU usage is 100 ...	New			2-7-200...
1...	Incident	Root password changed on Server02	New	Medium		19-7-20...
1...	Incident	New user added for Service desk, User ID: J...	New	Medium	Meeks, Bill	1-8-200...
1...	Incident	Server down: No connection after 45 sec.	New			2-8-200...
1...	Incident	Server 02 booted	New		Barns, Stan	6-8-200...
Service call - 2 item(s)						
2	Service ...	Run management invoice summary batch job	New	Medium	Barns, Stan	6-7-200...
0	Service ...	Run monthly invoice processing batch job	Accept	High	Barns, Stan	7-7-200...
Work order - 1 item(s)						
7...	Work or...	Place CPU in Web Server OPENVIEW3	New		Meeks, Bill	5-6-200...

8 Item(s)

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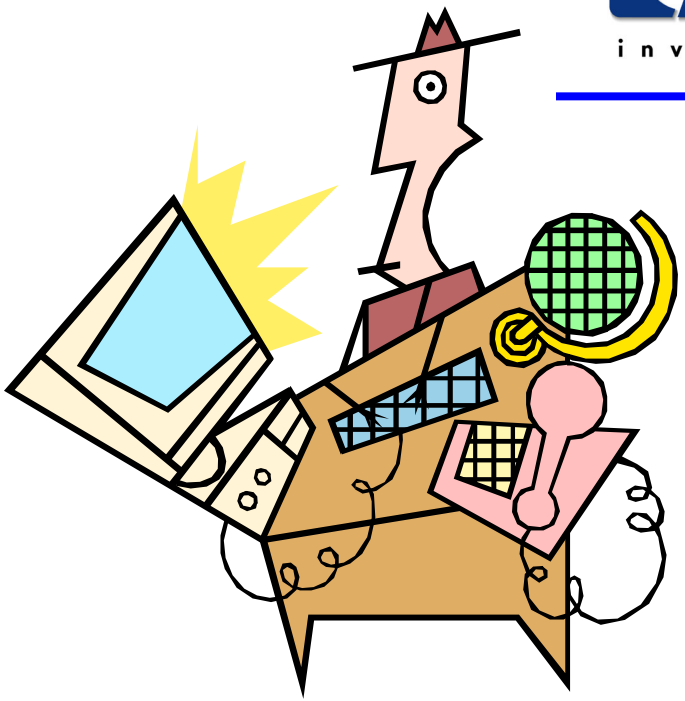
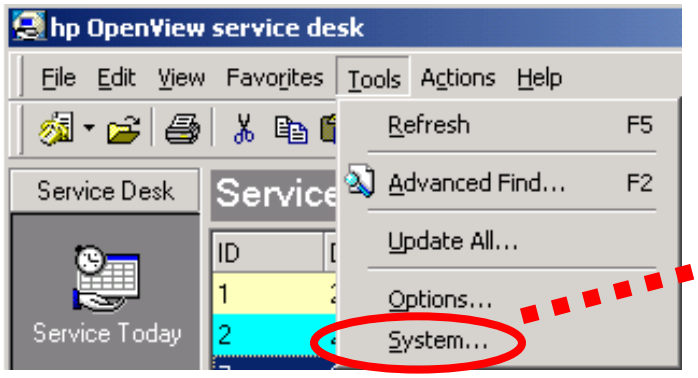
Let's:

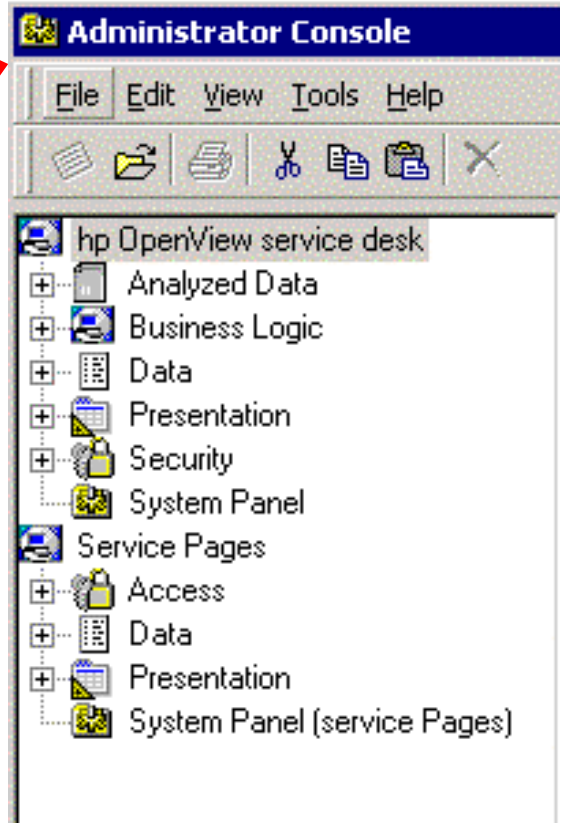
- go see the tool…
- do some exercises…
- have a break…

Administrator Console



Administrator Console - Overview





Two main areas:

hp OpenView service desk

- most configurables for service desk reside here
- analyzed data, business logic, data, presentation, security, system panel

Service Pages

- contains configurables specific to service pages only
- access, data, presentation, system panel

Remember! Tools -> System Tools -> System Tools -> System Tools -> System

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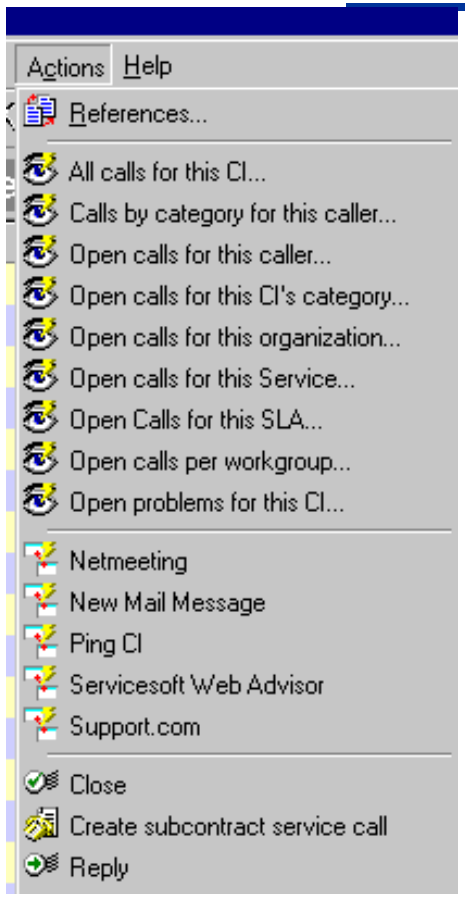
Business Logic → Actions

Defines the menu options offered in service desk "Actions" menu stack.

3 types:

- **Overview Actions are database queries that show results in list. This information is context sensitive, e.g. a list of all calls for the caller that is currently filled in in the caller field**
- **Smart Actions launch external applications with context sensitive parameters, e.g. executing a ping command on the IP address of a CI that is filled in in a service call**
- **System Actions are developer created and cannot be customized. Examples are Reply (change the assignment around) and the CI Generation Wizard**



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Business Logic → Application

Defines external applications for use in Smart Actions

- Name – user defined
- Command line – program file name (default - user can change this in the Options menu)
- Start in – folder name (default - user can change this in the Options menu)
- Description

Application

Drag a column header here to group by that column.

Name	Command line	Start in	Description
Internet Explorer	iexplore.exe	C:\	Startup Internet Explorerer
Mail	iexplore.exe	c:\	
Netmeeting	iexplore.exe	C:\	These are the paths to the Internet Explorer exe...
Notepad	c:\winnt\notepad.exe	c:\temp	Microsoft (R) Notepad
Notepad	Notepad.exe	c:\	
Ping	Ping.exe	C:\	Ping to the CI
Support.com	c:\program files\tioga\admin\bin\cont.exe	c:\program files\tioga\admin\bin\cont.exe	

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Database Rules Introduction

- Wizard guides you through:
  - when rule should fire: on insert, update or delete
  - which (timed) condition(s) should be met (when field value is …)
  - which action(s) should be performed where and with what parameters: command line execution, SD data update or sending an e-mail
  - name and categorization
- So, for example:
  - when service call is modified
  - where the status is “registered” 2 hours before the date/time in the deadline field
  - e-mail should be sent to the manager of the person that entered the service call with subject: “service call [ID] 2 hours from deadline” and body “Dear [manager name], Service call [ID], that was entered by [entered by person], has still status [status]. The deadline of the call is [deadline date/time]
    … and the service call status should be updated to “escalated”.
  - Name : “2Hr deadline”, Category: “Alerts”

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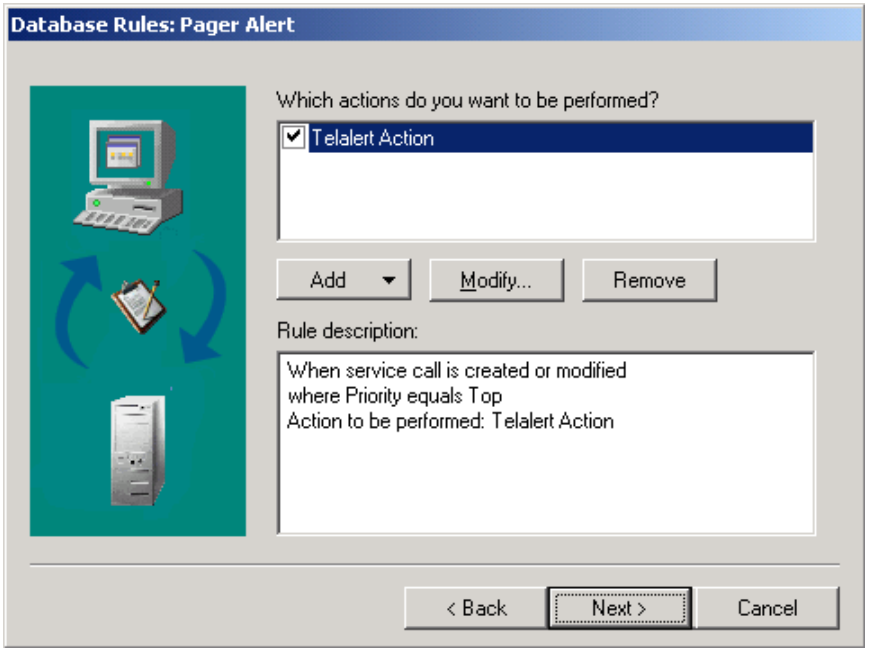
Business Logic → Database Rules

Perform a variety of **actions**, at any given **time,** on most **platforms**

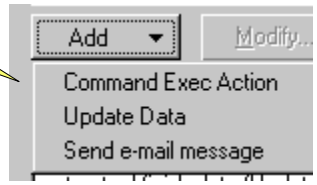
On the basis of an

- ***insert,***
- ***modify*** or
- ***delete***

in the Service Desk database.



Types of Actions



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UI Rules Introduction

- Wizard guides you through:
  - which preconditions should be met (optional)
  - which condition should trigger the execution of the rule
  - which action(s) should be performed and with what parameters: command line execution, SD data update, field value range limitation, overview or smart action or sending an e-mail
  - name and categorization
- So, for example:
  - when service call status is not “closed”
  - when service call classification is set to “RFC” (request for change)
  - the assignment-to-person field should be set to the Change Manager … and the service call status should be updated to “RFC submitted”.
  - Name : “RFC to Change Manager”, Category: “Assignments”

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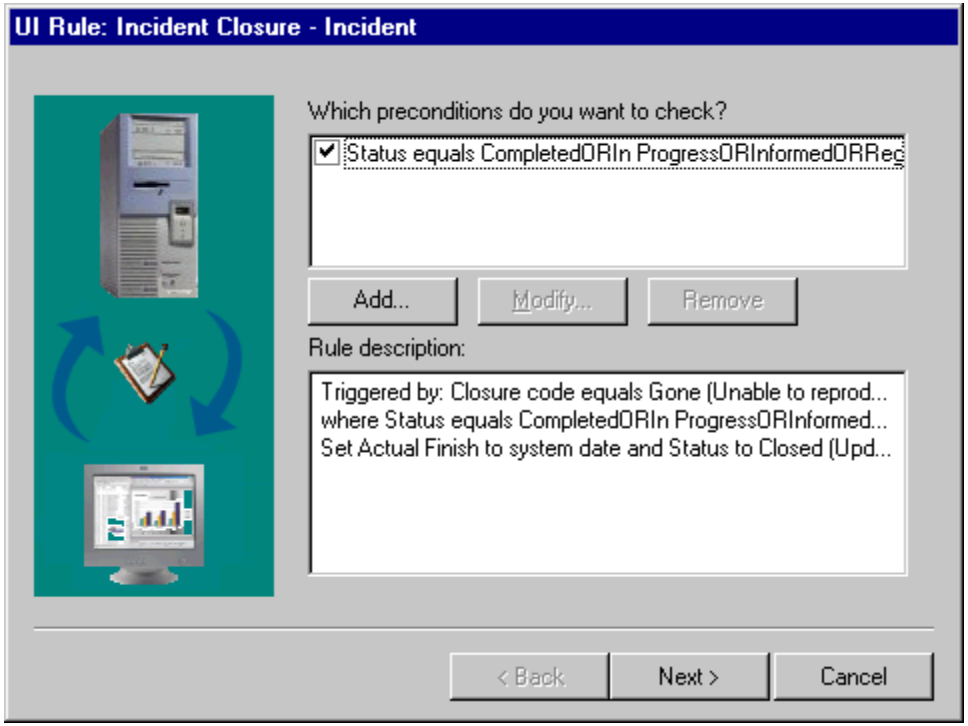
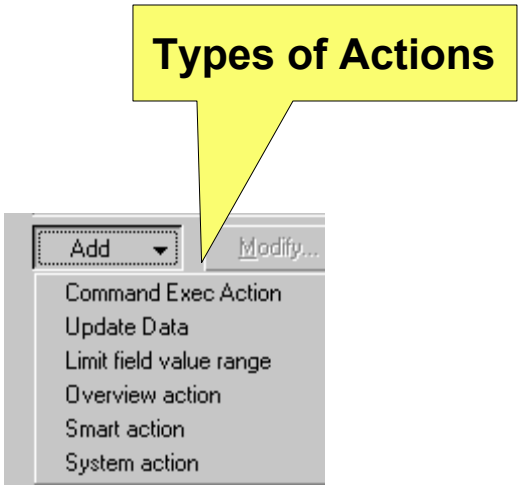
Business Logic → UI Rules

Set data into fields or run actions automatically based on user interface conditions.





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Business Logic → Scheduled tasks

- This task list shows:
  - all database rules that are scheduled (on any active application server) for execution in the future
  - all scheduled SLA evaluation reports (the first to come based on the recurrence pattern that has been defined)

- The feature allows you to:
  - reschedule all tasks to the application server you are currently connected to when any tasks in the list are scheduled to be run on application servers that are currently not active

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Administrator Console Export Settings (ACES)

- ACES enables you to export system settings (forms, views, database rules, etc.) from one SD database and import these into another, e.g. from a test environment to the production environment.
- Does NOT include:
  - Application Password settings, Attachment settings, Audit rules, Calculated Fields, Copy fields, E-mail settings, General settings, Icons, Regional settings, Report settings, Search, Shortcut Bar, SP Password settings, SP Template Settings, SP View Settings
- Option to overwrite existing settings when importing settings
- Exchange files in XML format, structure differs from regular Data Exchange files
- Export Wizard and Import Wizard provided
- No command line interface

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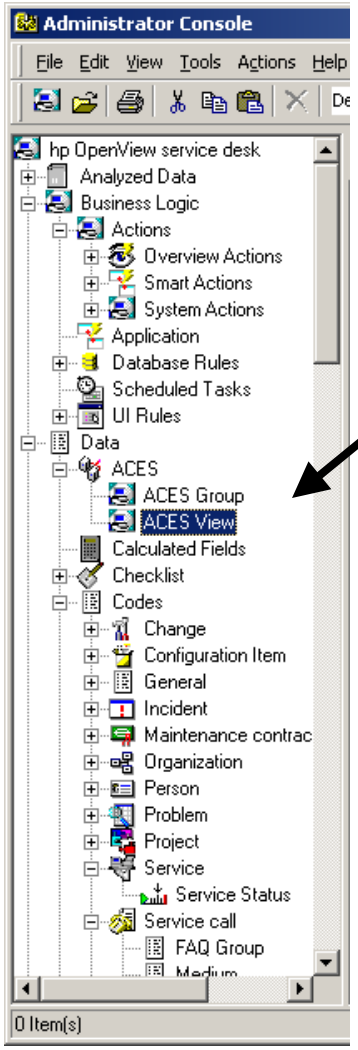
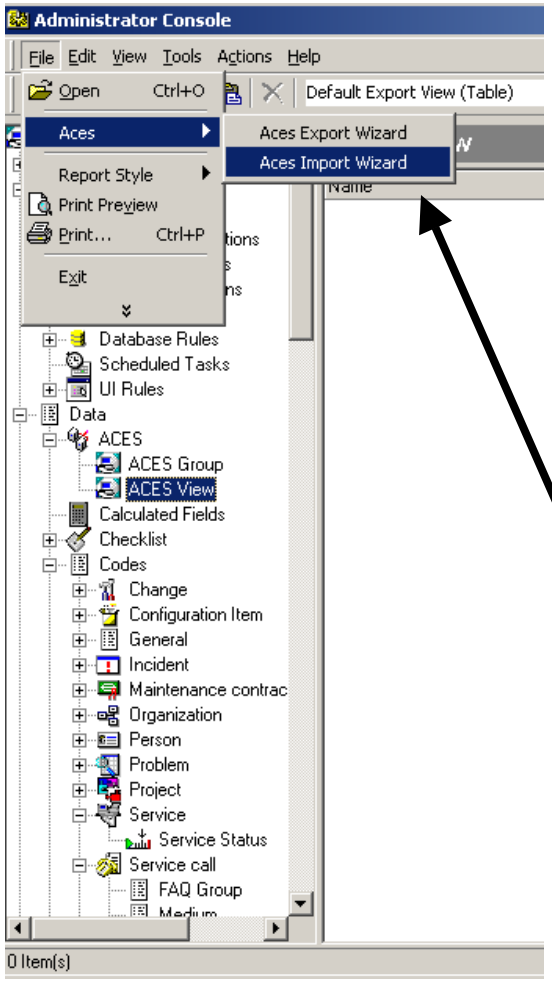
Data → ACES



Groups & Views



Export & Import

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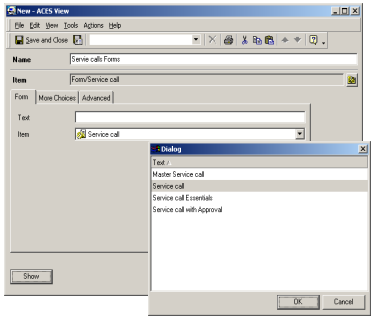
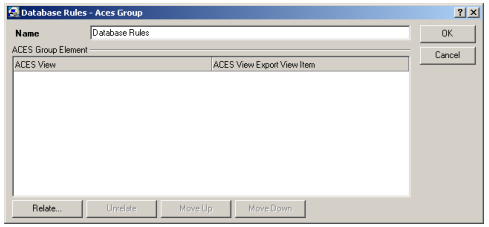
ACES steps

- Steps in the process:
  - 1 define ACES View(s)
  - 2 group ACES View(s)
  - 3 export ACES Groups with wizard
  - 4 import ACES XML files with wizard

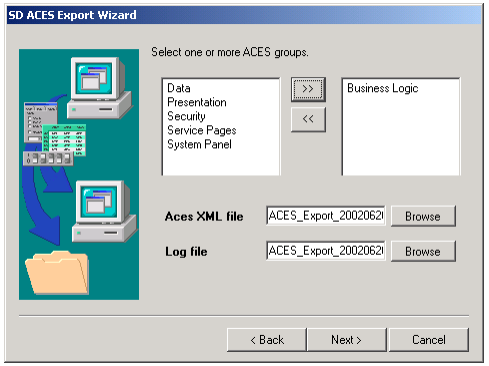


1

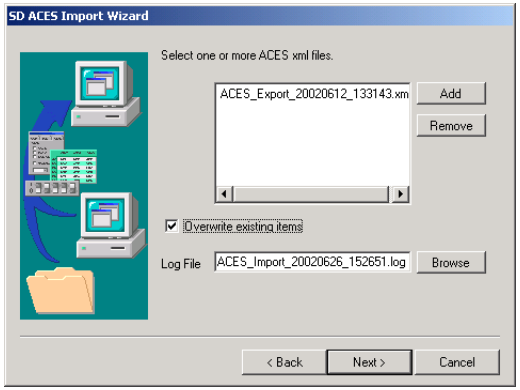


2

3



4



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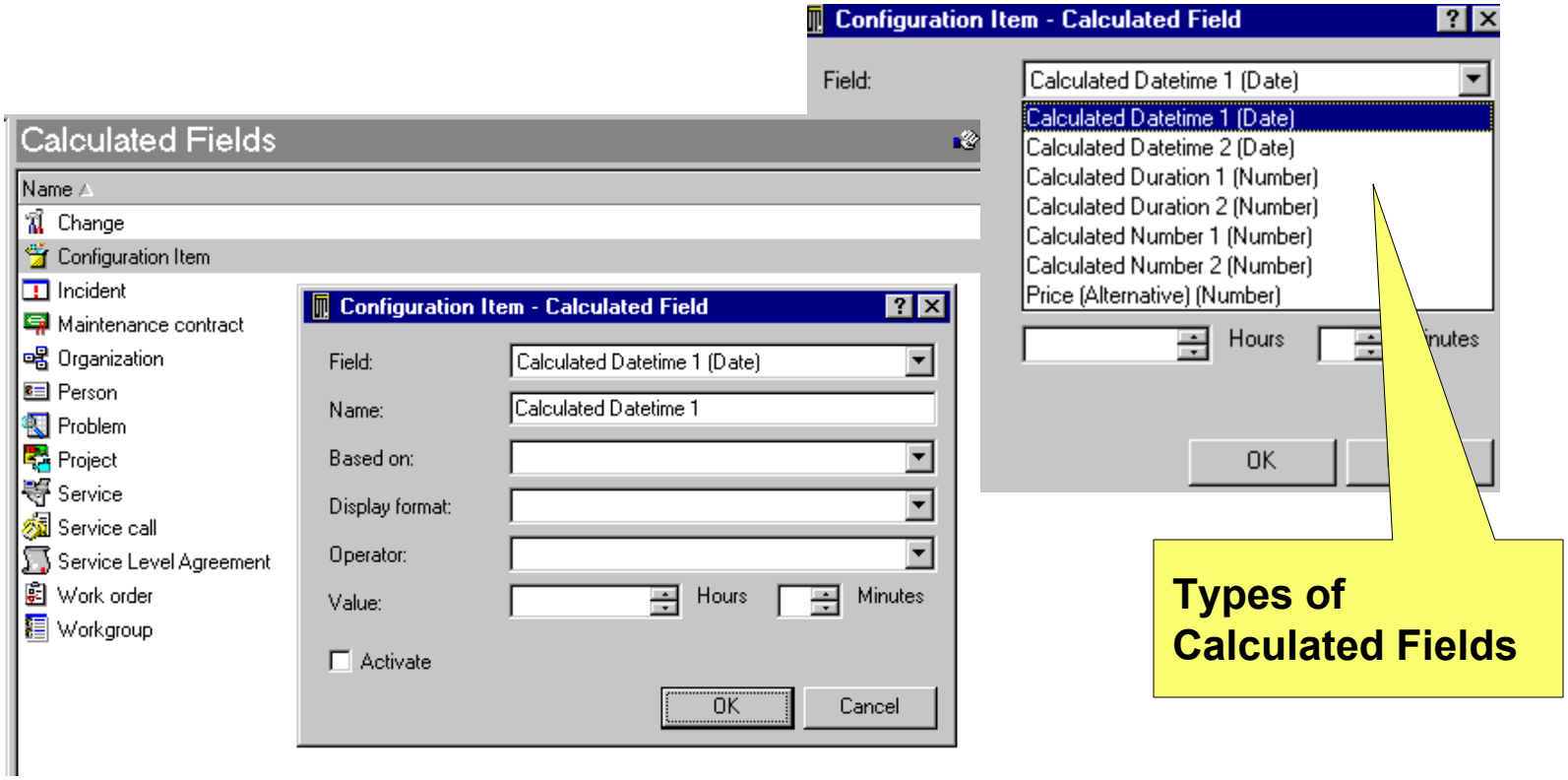
Data → Calculated Fields

Calculated fields can be defined based on the value of other fields, a relative operator (e.g. add, subtract) and a value



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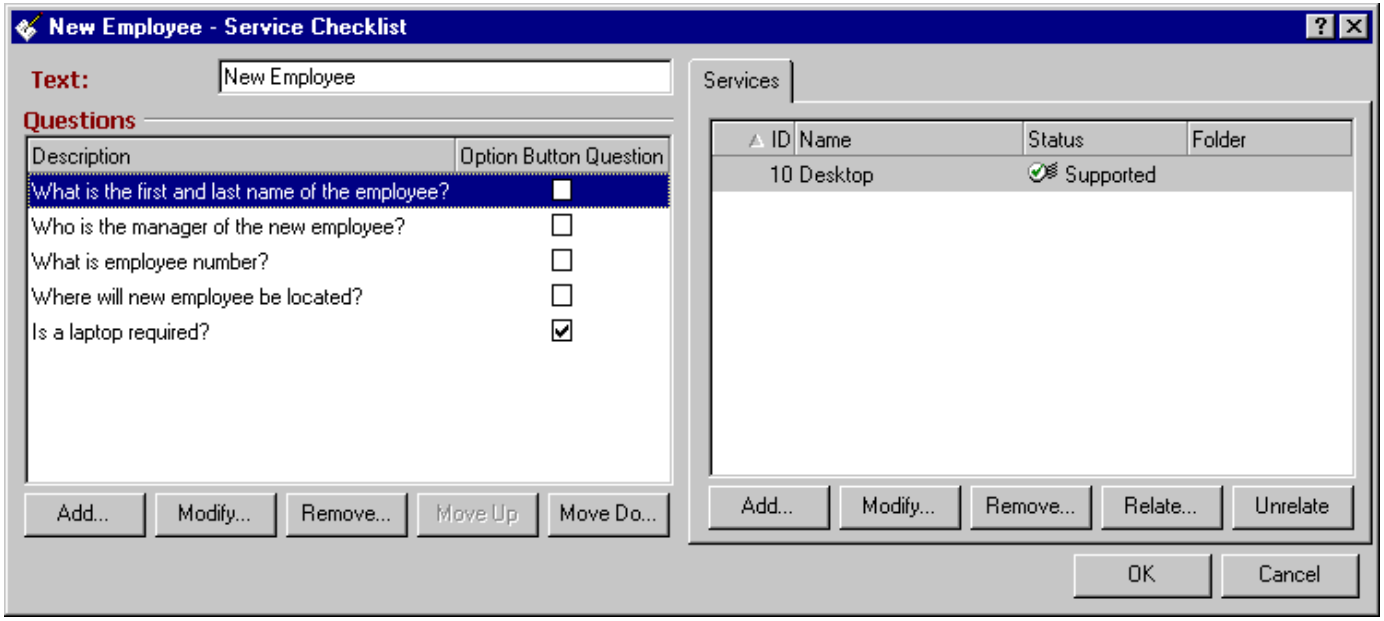
Data → Checklist

Can be used to aid helpdesk employees to gather information from a caller. The questions and the answers entered are appended to the Information field.

Defines what will appear when "`Actions->Checklist Wizard`" is used.

3 checklist types:

- Classification
- General
- Service



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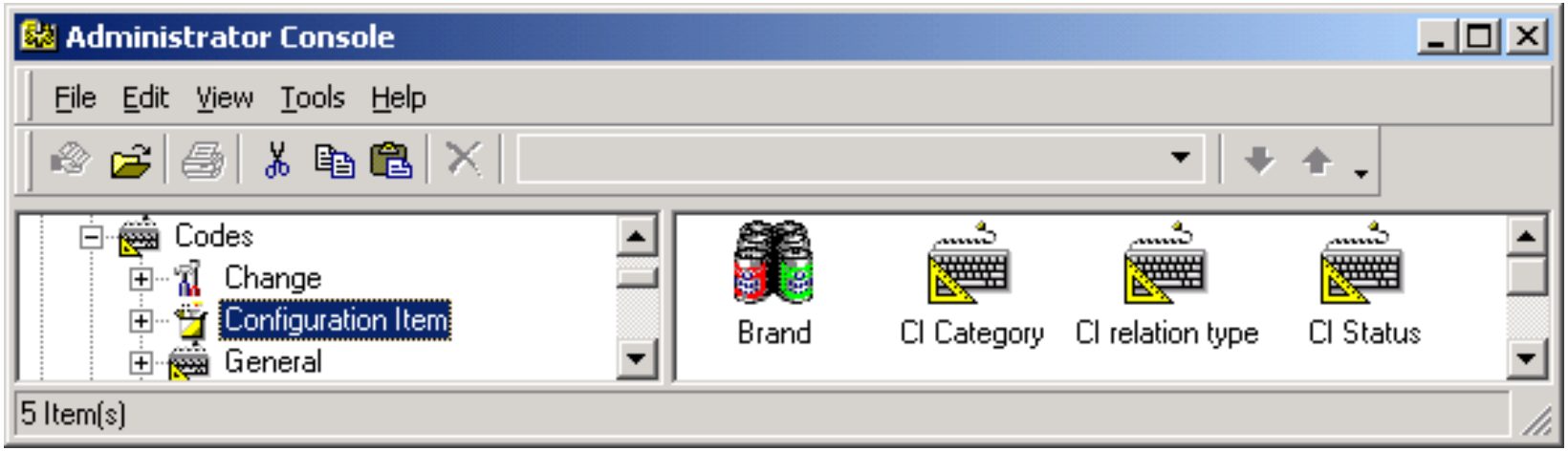
Data → Codes

- There are several code tables per item and a few general code tables.
- The contents of these can be modified and customized.
- Code tables can be hierarchical (e.g. CI category) or flat (e.g. status)
- This is an important and typical place for site-specific adjustments.
- The corresponding process is always the basis for this!



Examples:

Status codes, Classifications, Categories, FAQ groups, Closure codes, Priorities, Severities, Impacts, Service Levels

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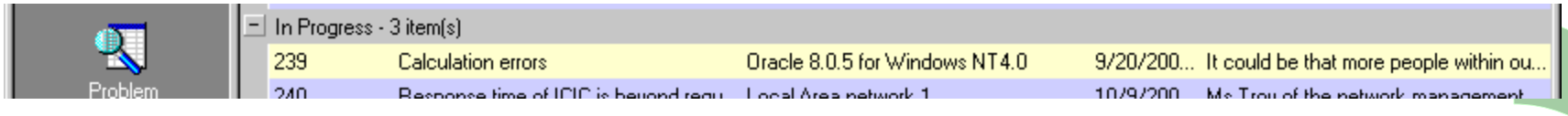
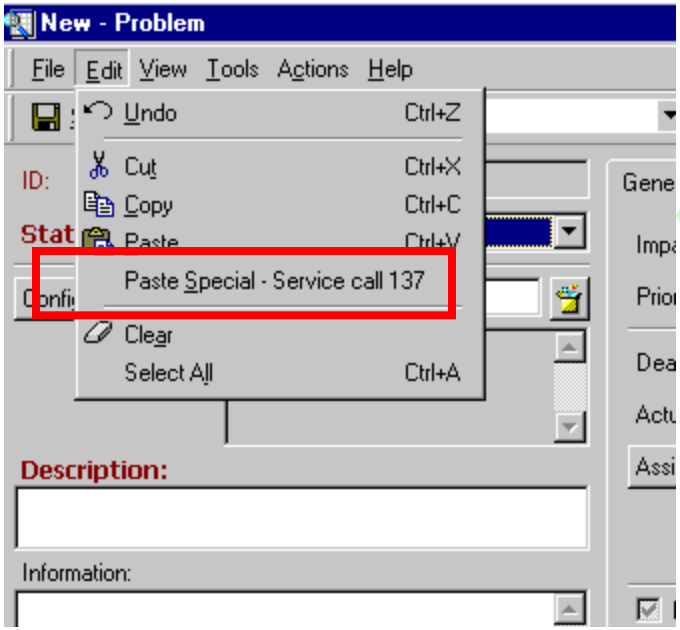
Data → Copy Fields

Step 1: Ctrl-C



Step 2: Edit→Paste Special



Controls which fields in a record are to be copied when the complete record is copied. This may be a copy of a service call to a service call, but also e.g. of a service call to a problem.

Copying can be done through the Edit menu or through Ctrl-C, Ctrl-V in a view.

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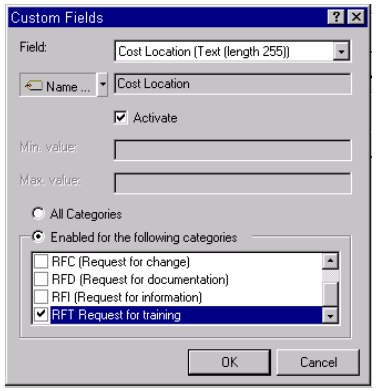
Data → Custom fields

Need more fields than the standard set supplied with Service Desk out-of-the-box? Use Custom Fields!



- This is an important and typical place for site-specific adjustments.
- The corresponding process is always the basis for this!
- Over 860 fields available!
- Can be enabled/disabled per item category

field types / items	text 40	text 255	text 4000	text 64Kb	code	date	number	boolean	org	person	work group	CI	service
Service Call	10	25	5	1	10	10	10	5	1	1	1	1	0
Incident	10	25	5	1	10	10	10	5	1	1	1	1	0
Problem	5	5	5	1	5	5	5	5	1	1	1	1	1
Change	10	25	5	1	10	10	10	5	1	1	1	1	1
Workorder	10	25	5	1	10	10	10	5	1	1	1	1	0
Project	5	5	5	1	5	5	5	5	1	1	1	1	0
Configuration Item	60	100	5	1	25	10	15	5	1	1	1	0	0
Maintenance Contract	5	5	0	1	5	5	5	0	1	1	1	1	0
Organization	5	5	0	1	5	5	5	0	0	1	1	1	0
Person	10	25	0	1	10	10	10	0	1	0	1	1	0
Workgroup	5	5	0	1	5	5	5	0	1	1	0	1	0
Service	5	5	5	1	5	5	5	5	1	1	1	1	0
SLA	5	5	5	1	5	5	5	5	1	1	1	1	0

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Custom fields recipe

- Determine the Item requiring the custom field
  - Service Call, Change, Problem, Person, etc.
- Determine the Field type
  - Text (40, 255, 4000 or 65536 characters), Code, Number, Date, Boolean, Item reference.
- Enter a Field name
- Determine for which categories the field should be enabled
- Activate the field by checking the Activate checkbox
- In case of custom code fields, create a code table under Data – Codes - Item
- Finally, add the field to the appropriate form(s)

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Data → Data Exchange

- Data Exchange Task
  - create tasks that export data from an external data source and imports this data into the Service Desk database
- Data Exchange Task Group
  - group a set of tasks for execution
- Import Mapping
  - maps external data source classes and attributes to Service Desk items and fields

More on this topic later

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Data → Web API

- Enables you to select a set of fields to be queried by a Web API application
- May increase performance over using the default field selection (which is also used by Service Pages) by decreasing the number of fields queried
- May extend field selection over the default set

? The Web API is a number of classes written in pure Java that enable programmers to access and manipulate Service Desk data.

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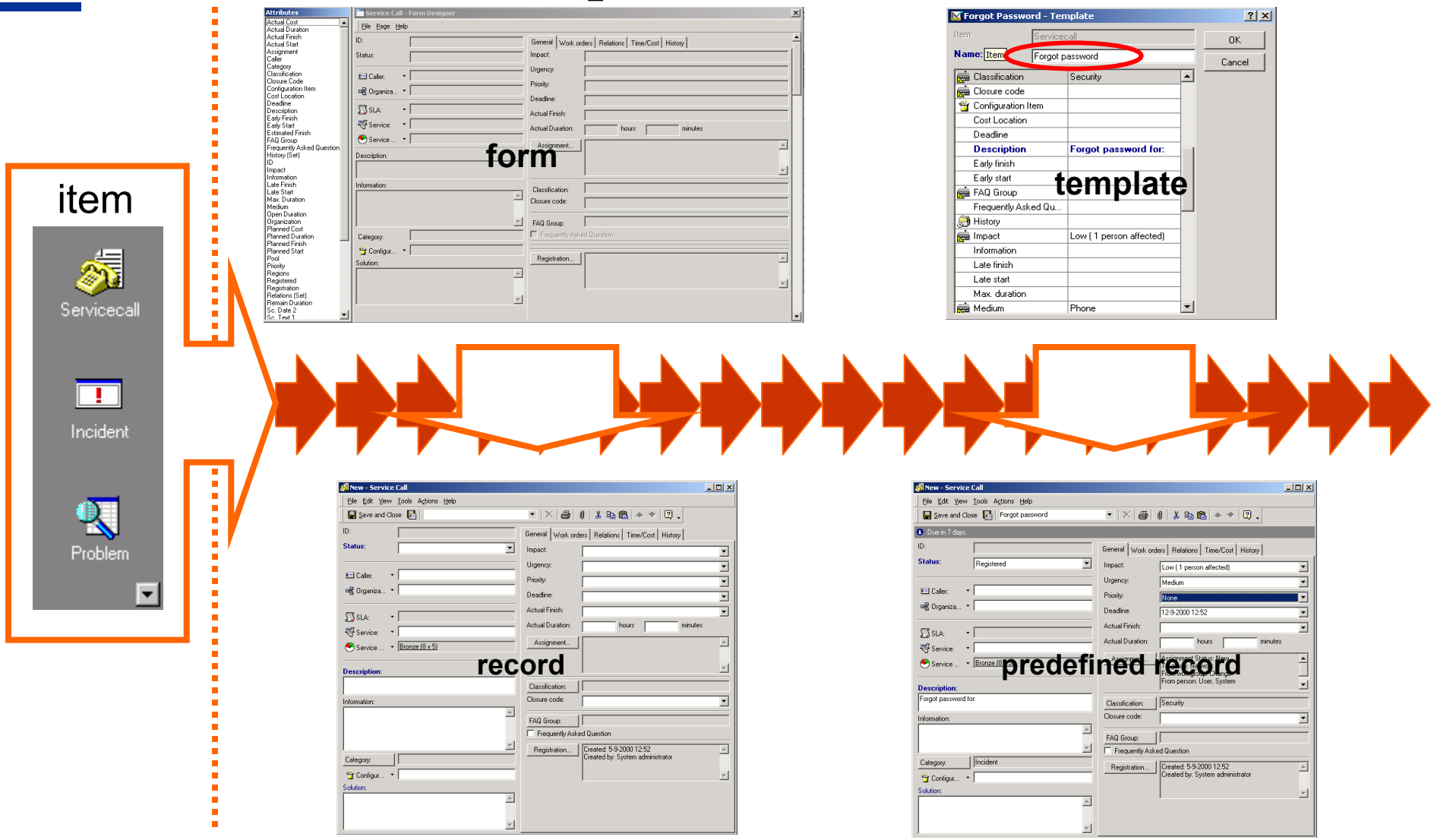
Forms versus Templates



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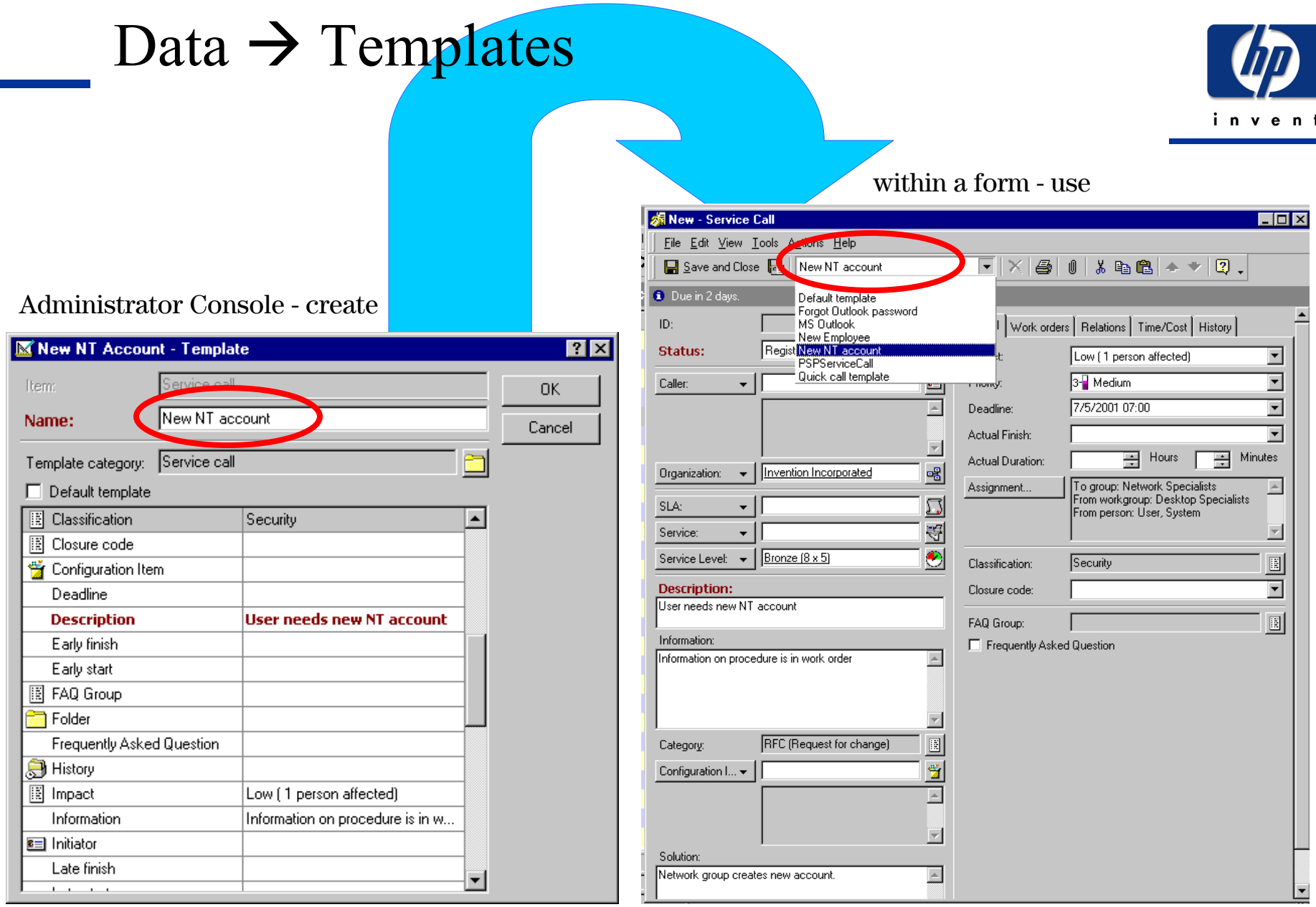
Data → Templates



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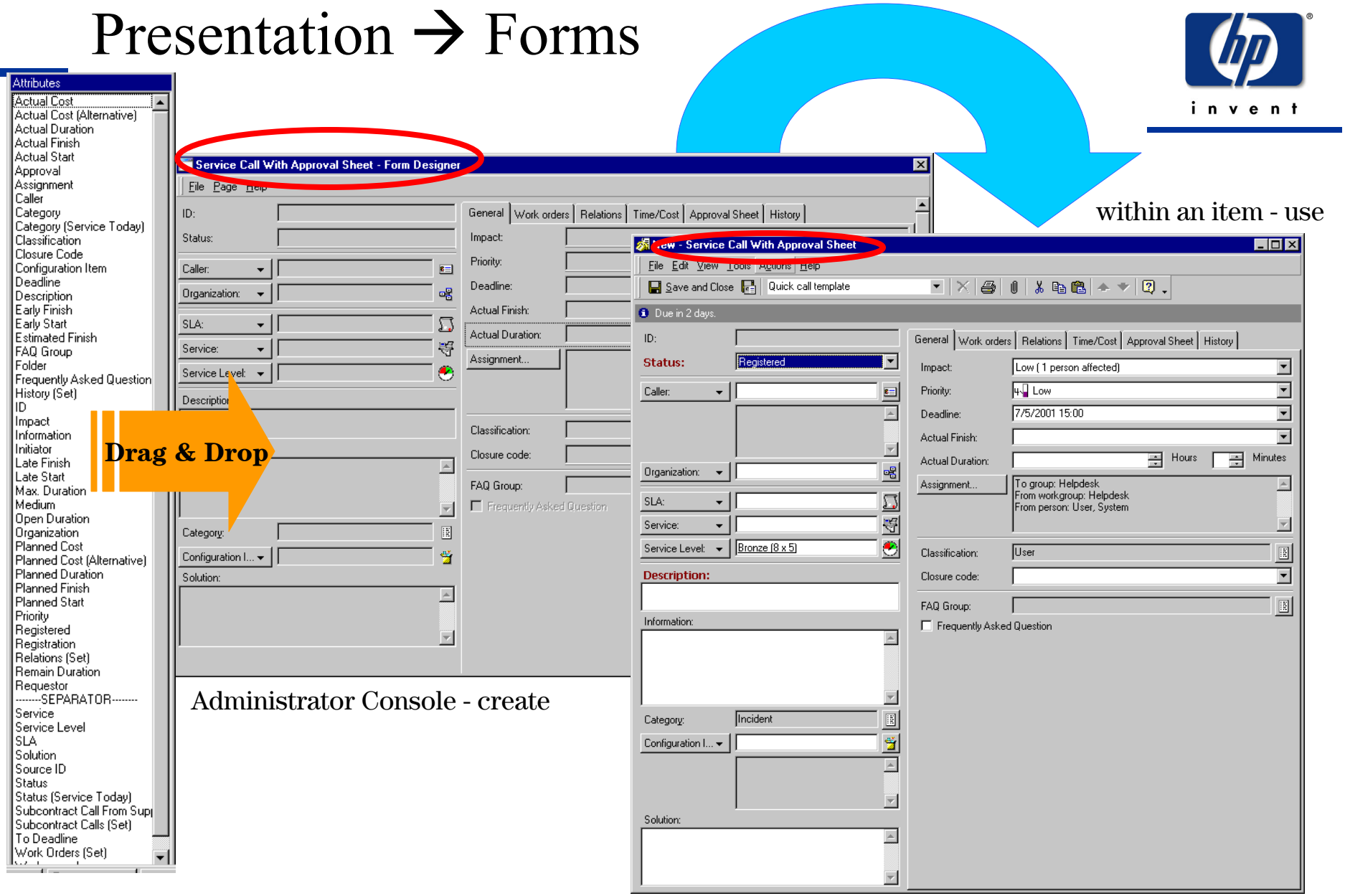
Presentation → Forms



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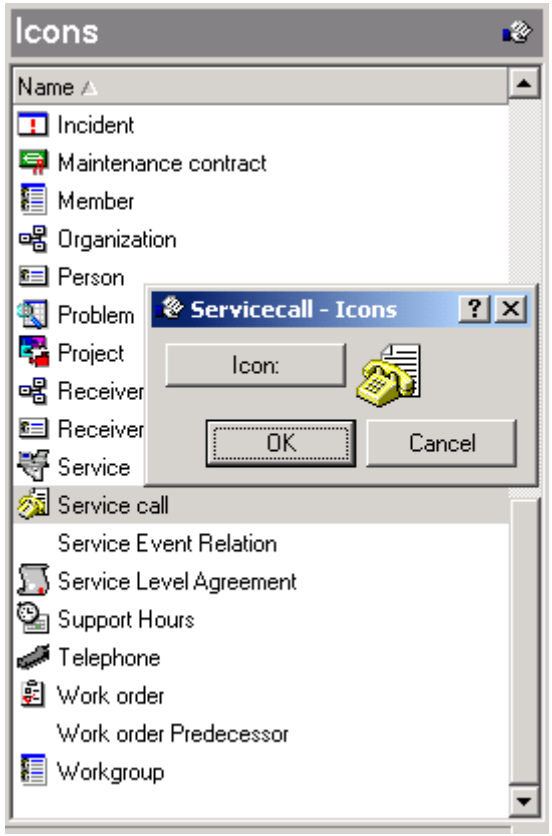
Presentation → Icons



In other places it is also possible to have icons, for example, codes in code tables.

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Localized Text Concepts

- Localization enables translation or adaptation of almost any text used in Service Desk
  - For use in local language
  - For use with your organization's IT idiom
- Service Desk supports the UTF-8 character set (other internationally standardized character sets may work but are not supported officially)
- Service Desk is created using the US-English language. Localization packs will be(come) available for German, Spanish, French, Japanese, Korean, Simplified Chinese, Traditional Chinese and Dutch

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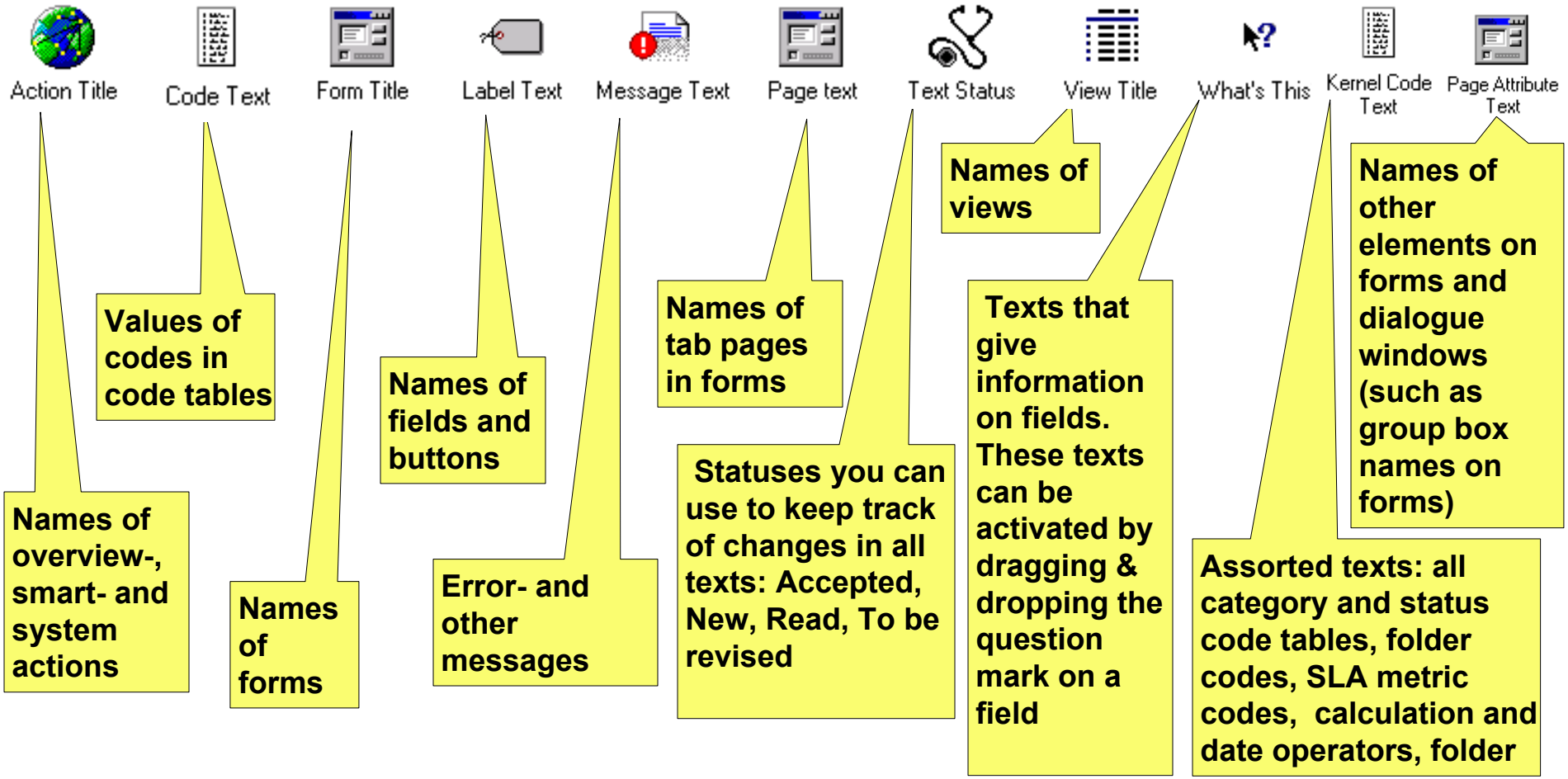
Presentation → Localized Text



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Search Concepts

- Search configuration settings comprise:
  - fields shown when clicking the Quick view button (yellow call-out)
  - standard field set for advanced find window
  - default view for displaying search results
  - query restrictions to support performance
  - standard search field
  - show fields for a number of fields based on Quick View settings

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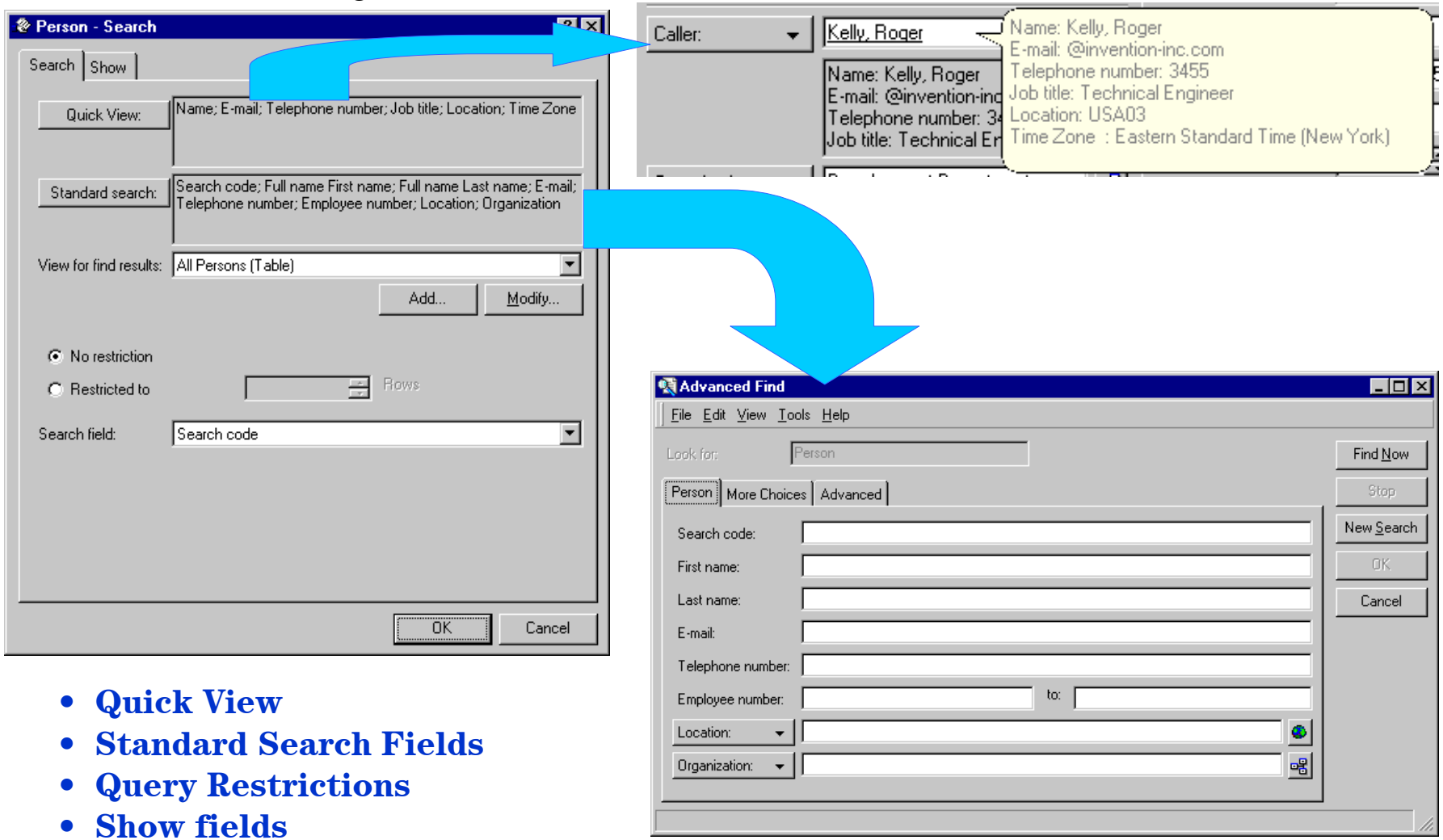
Presentation → Search

Administrator Console - configure



- **Quick View**
- **Standard Search Fields**
- **Query Restrictions**
- **Show fields**

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Presentation → Shortcut Bar

- Users can customize their own shortcut bar
- Shortcut bars can be reset to the version defined at system administrator level but there's no automatic distribution of updated shortcut bar definitions at system administrator level
- The shortcut bar definition is stored in the ShortcutBar.DAT file. The locations for the ShortcutBar.DAT file are:
  - the standard shortcut bar is located in the \repo folder in the Service Desk root folder
  - the user's shortcut bar is located in the \Application Data\Hewlett-Packard\OpenView\Service Desk\ in the user's personal profile folder.

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Presentation → Views

- Creation of Views for all Items
  - Interface identical to view definition on user level
  - Access to views can be set in role definitions

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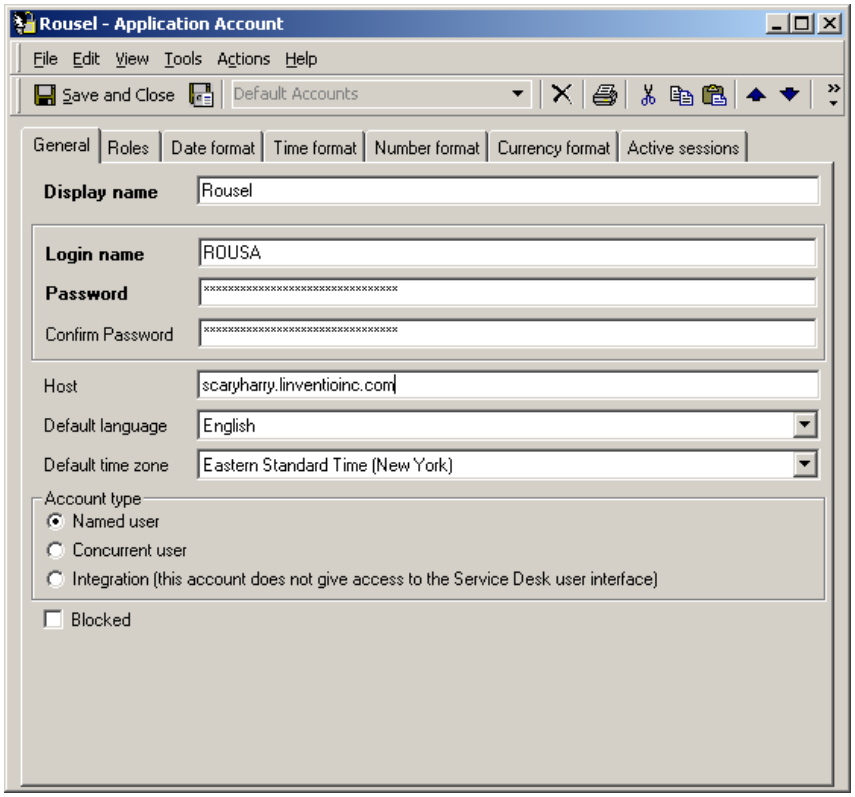
Security → Access → Application Account

- Named user and concurrent user tied to licensing, integration account is not.
- Both named and concurrent user accounts have access to SD GUI and Service Pages
- Host is used to be able to send commands to user's machine as a result of DB or UI rules
- Default date, time, number and currency formats can be set
- Possibility to create a template for accounts
- Link account to one or more roles for access to Service Desk
- Link account to Person (not essential but recommended to link user to items that are created)



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Role Concepts (1 of 2)

- A role defines the access a user has to Service Desk
- Access can be set to:
  - allow or deny creating, viewing, modifying and deleting items (e.g service calls)
  - maintain templates for items
  - view and write to fields within items
  - use forms, views, templates, actions per item
- More detailed access can be set to allow:
  - viewing and modifying items based on assignment
  - viewing and modifying history lines
  - modifying items in a specific status range

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Role Concepts (2 of 2)

- Access can be further refined using Folder Entitlement
  - each item in Service Desk has the standard Folder attribute (or field)
  - values for Folder are stored in a code table (Admin Console-Data-Codes-General)
  - access to an item can be based on the value a record has for Folder
  - Folder code table can be hierarchic

- Folder entitlement is used for:
  - creating separate record pools, and access to these, for different customers, employees, regions, workgroups, etc.

- Folder entitlement must be switched on in the General Settings in the System panel

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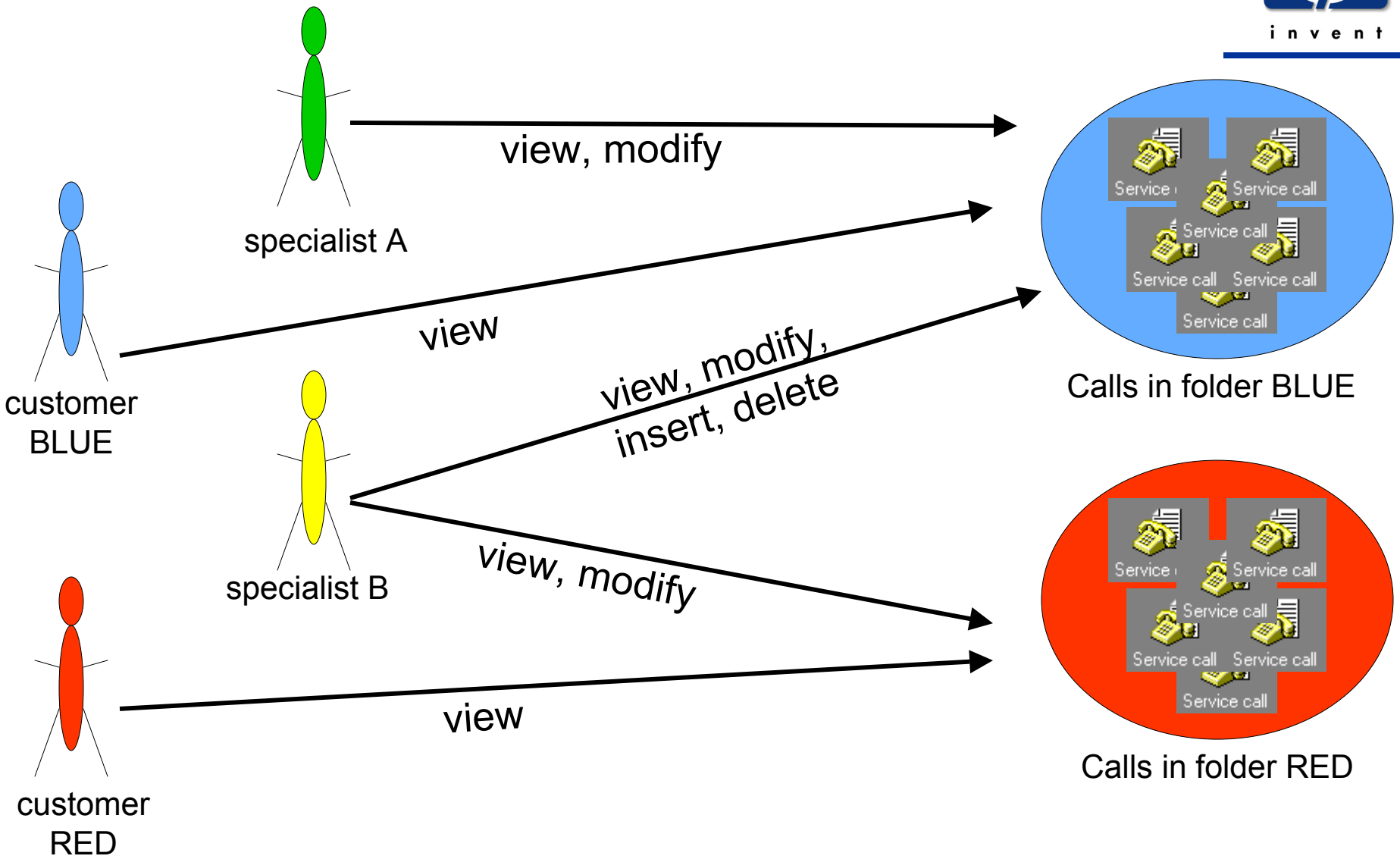
Folder Concept



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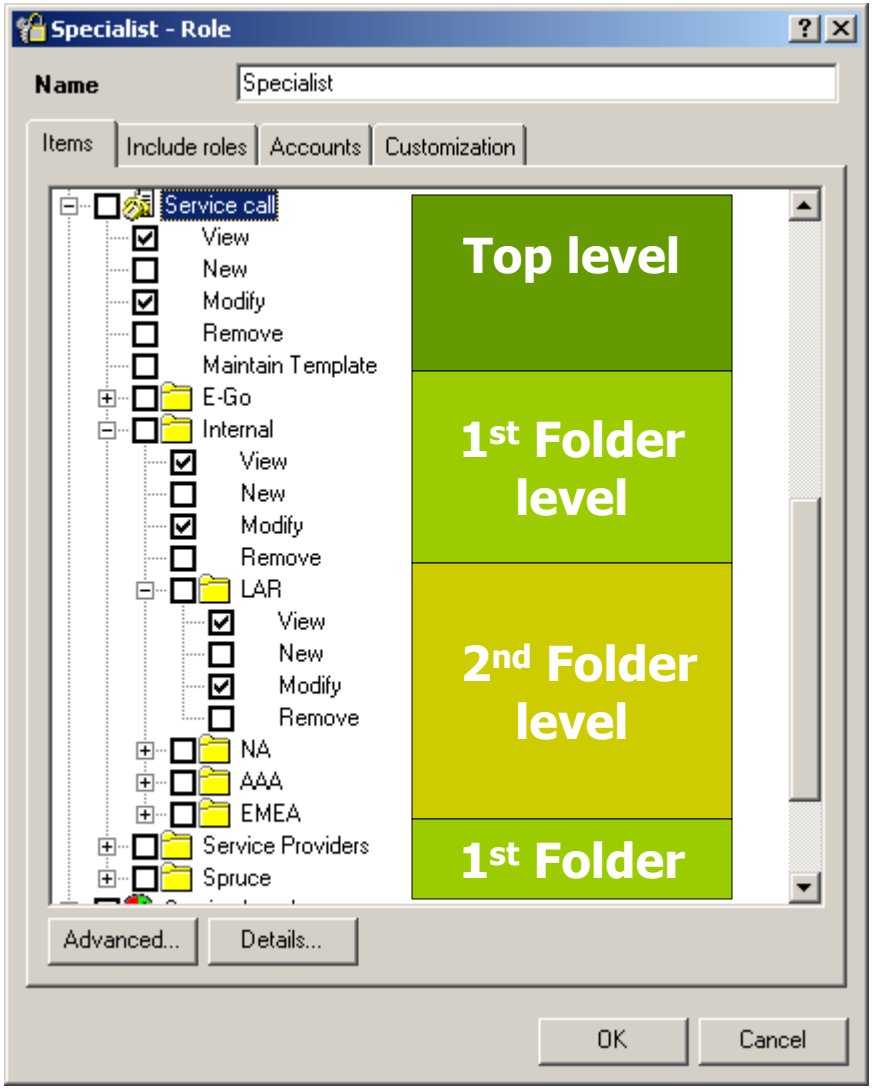
Security → Access → Role



- Passing down of access rights
  - Main item is at top level, folder hierarchy below that
  - All access rights at a higher level are passed down to all lower levels
  - passed-down access rights can only be switched off at the level from which they are passed down from

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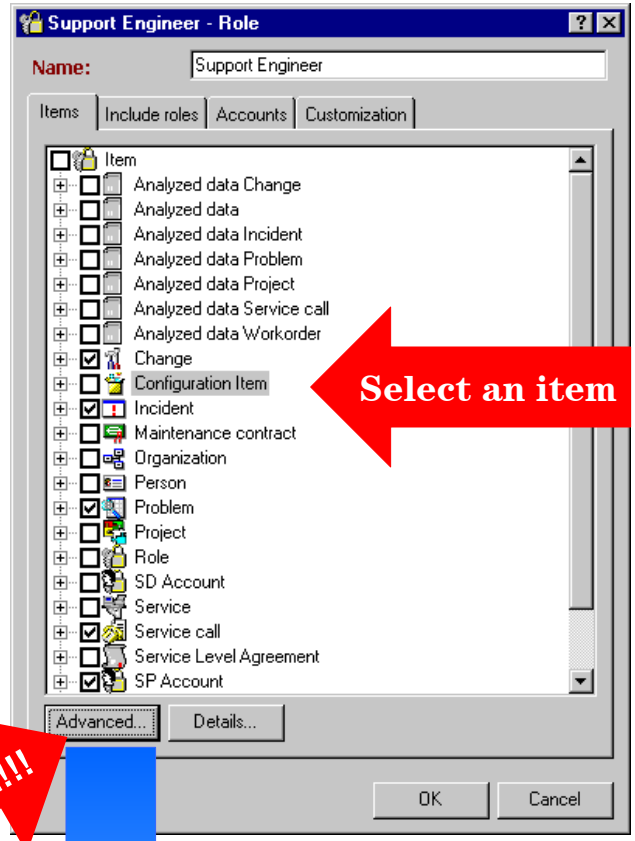
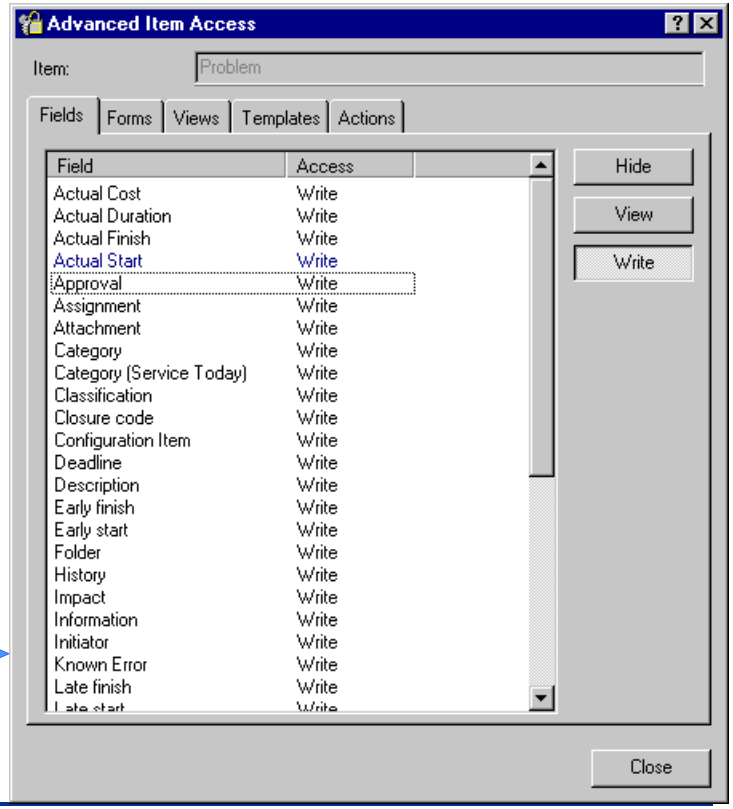
Security → Access → Role – "Advanced"



Select an item

Important button!!!

- Advanced access rights to fields, forms, views, templates and actions



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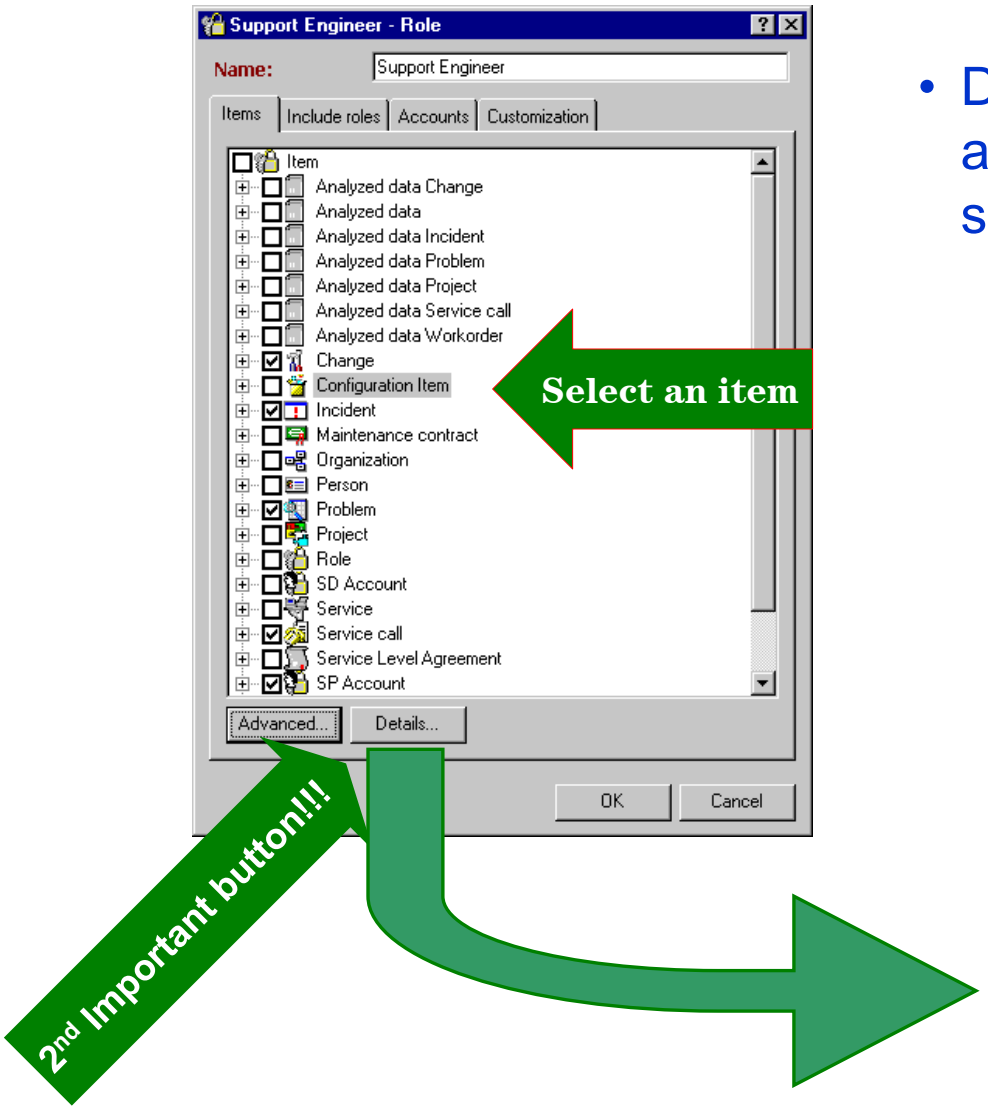
Security → Access → Role – "Details"



- Detail access related to assignment, history lines and status ranges

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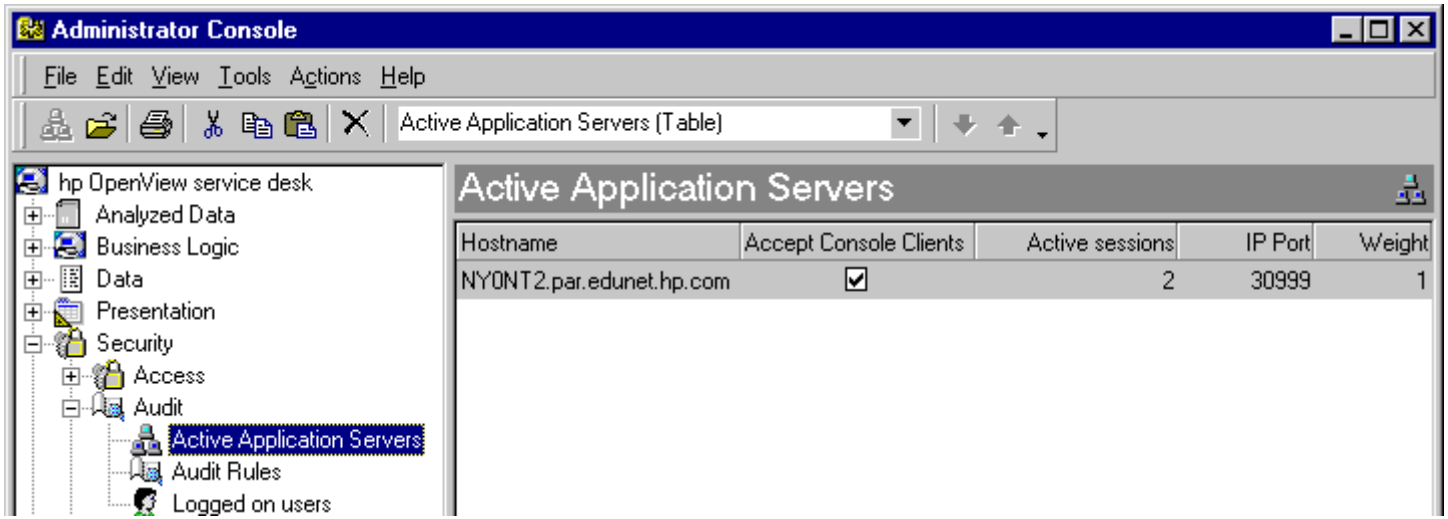
Security → Audit → Active Application Servers

- Shows active Service Desk Application Servers
- Includes number of active clients per server



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Audit Rules Concepts

- Audit rules define what information in Service Desk is audited
- Audit rules can be set per field per item and are available for all items
- Results of audit rules appear in history lines or analyzed data views
- Audit rules are used to:
  - audit, track and monitor changes in records
  - collect data for reporting purposes, e.g. for analyzed data
- History lines created as a consequence of audit rules can only be removed when authorized to do so

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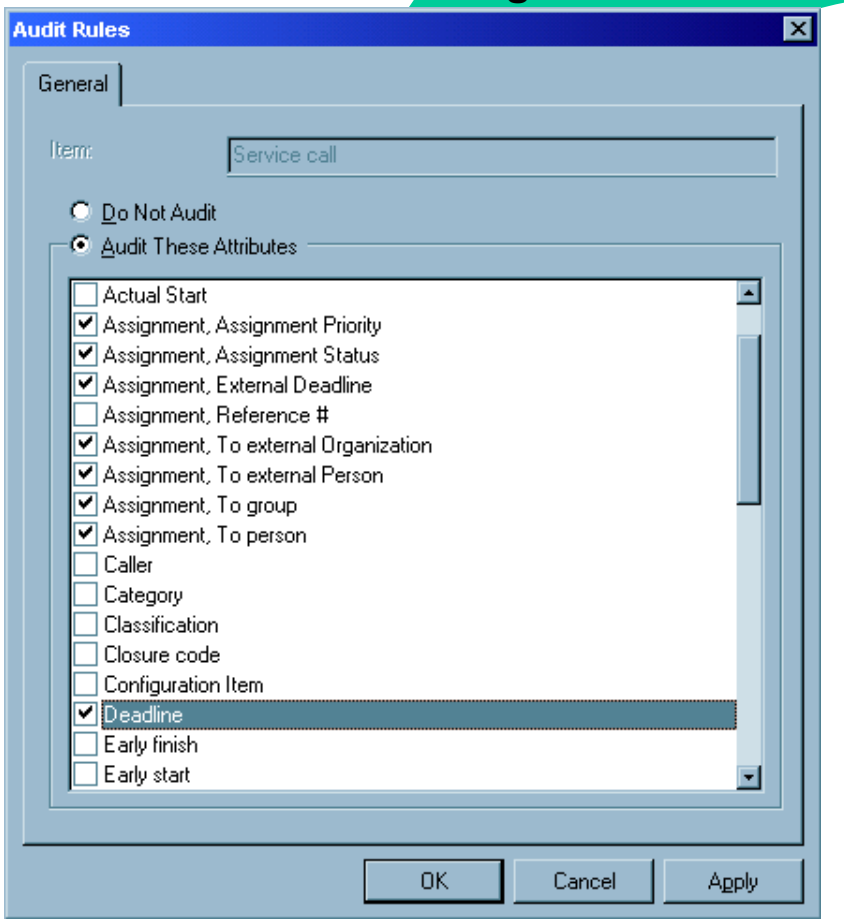
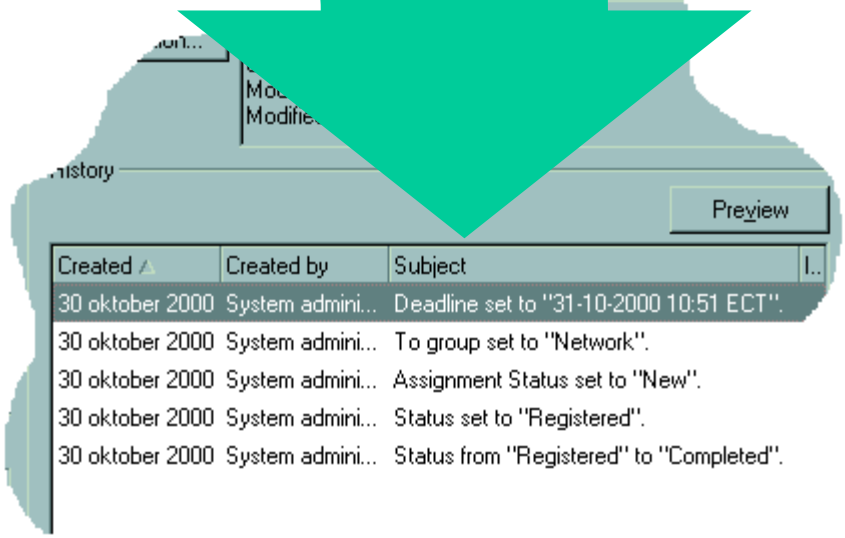
Security → Audit → Audit Rules

Administrator Console - configure



In a service call, it looks something like this



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Security → Audit → Logged on Users

See who is (or was) logged on in Service Desk

Administrator Console

File Edit View Tools Actions Help

Sessions (Table)

- Templates
- Presentation
  - Forms
  - Icons
  - Search
  - Shortcut Bar
  - Text
  - Views
- Security
  - Access
  - Audit
    - Audit Rules
    - Logged on users
  - Prevention
- System Panel

Logged on users

Account

Created	Account	Client IP Address
Graham Michael - 1 item(s)		
28-10-2000 13:04	Graham Michael	127.0.0.1
Paulien Jefferson - 1 item(s)		
30-10-2000 13:43	Paulien Jefferson	169.254.85.39
System administrator - 4 item(s)		
30-10-2000 15:40	System administrator	169.254.85.39
28-10-2000 13:05	System administrator	
16-11-2000 13:16	System administrator	
30-10-2000 15:31	System administrator	169.254.85.39

6 Item(s)

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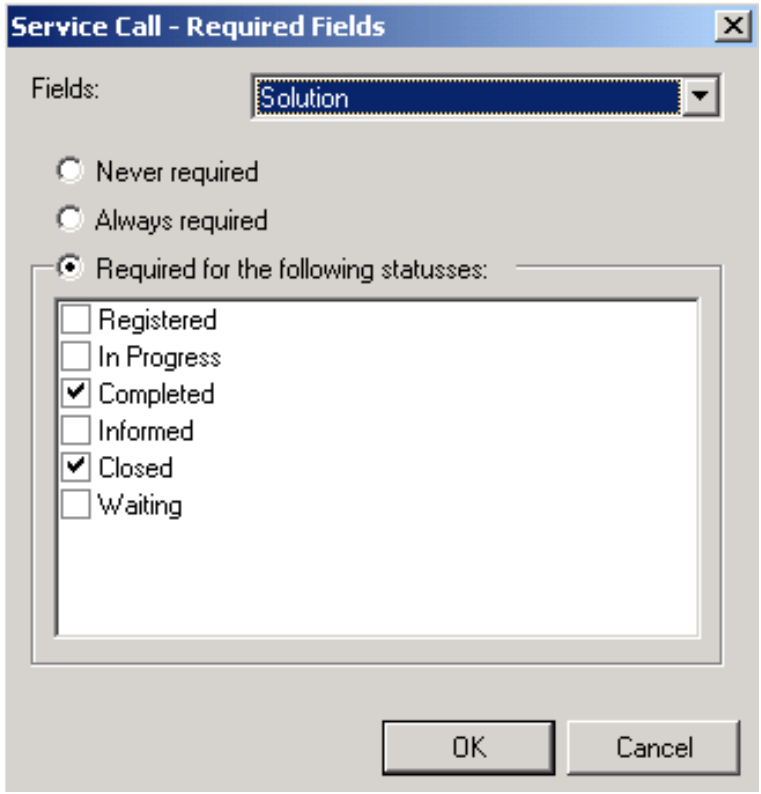
Security → Prevention

Required fields on the basis of statuses

Critical to merge with Role definitions & Workflow



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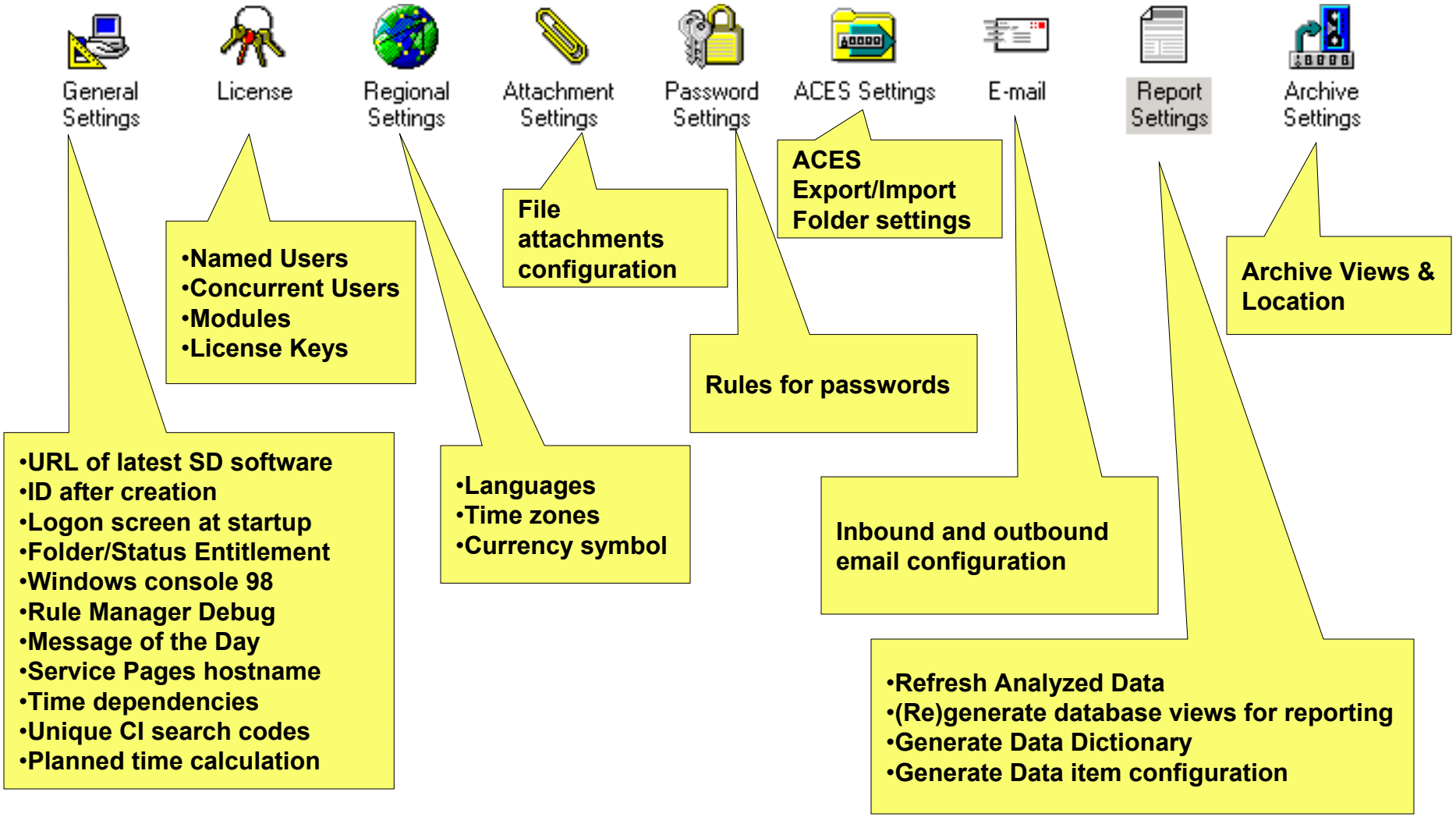
System Panel



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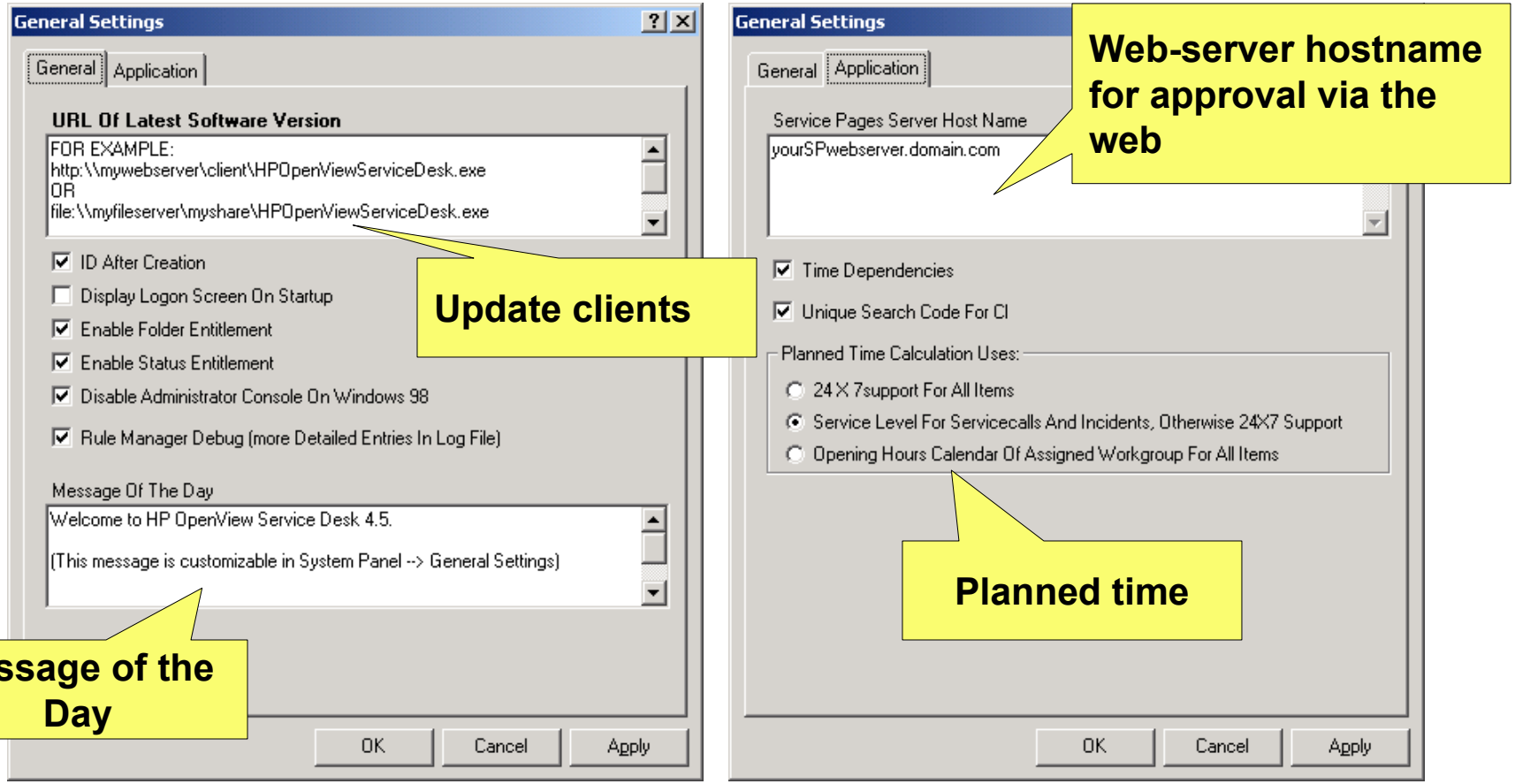
System Panel → General Settings



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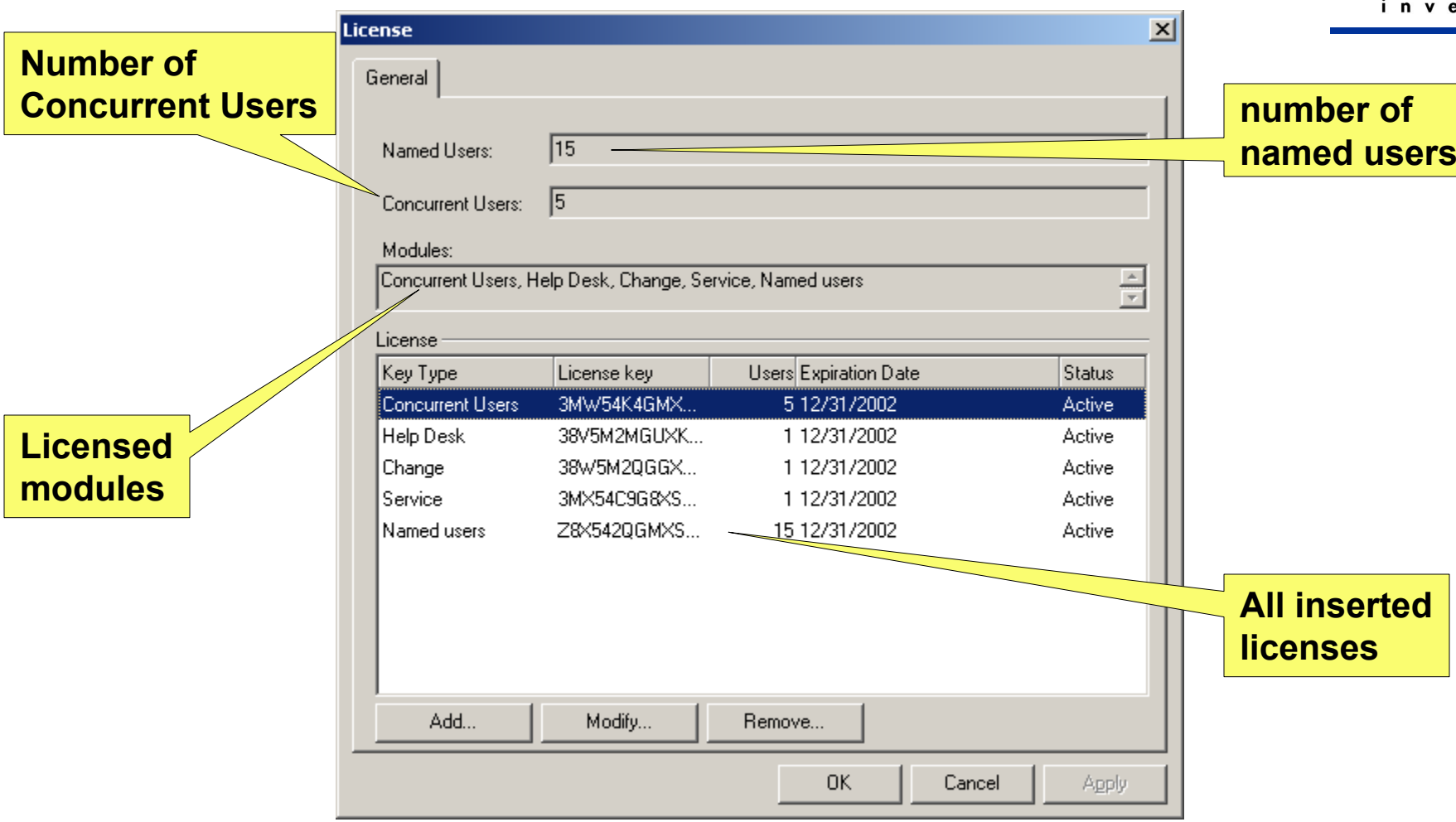
System Panel → License



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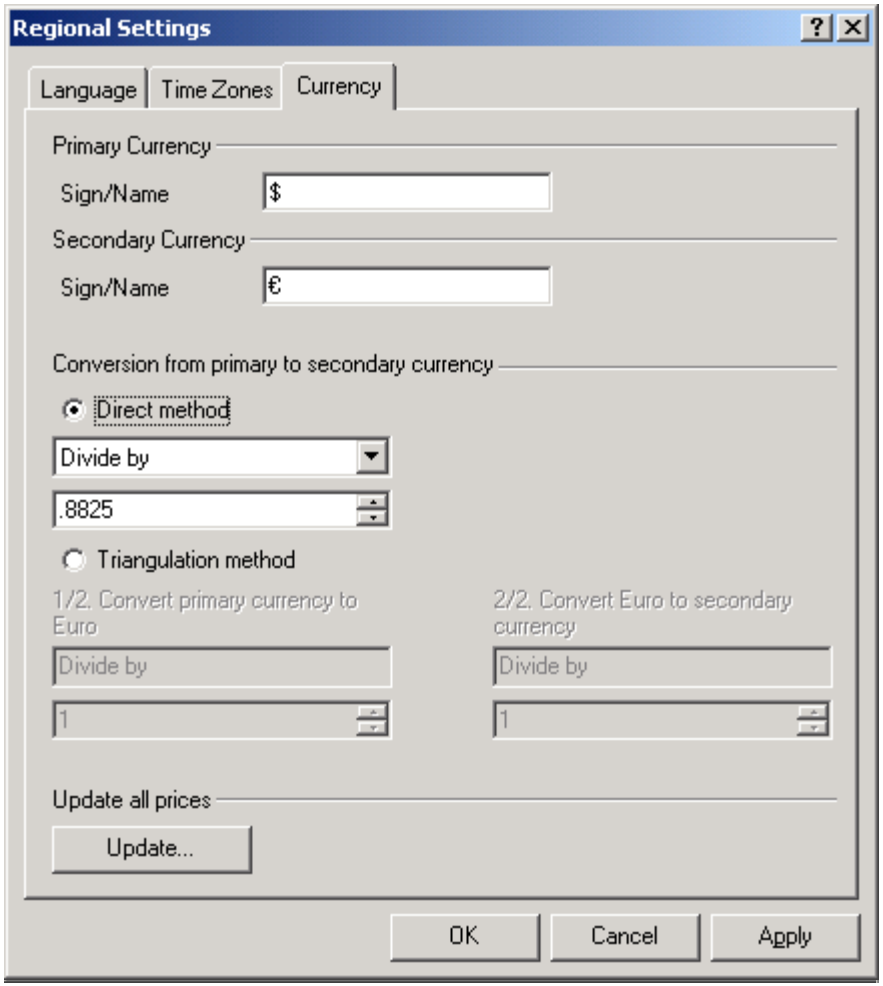
System Panel → Regional settings



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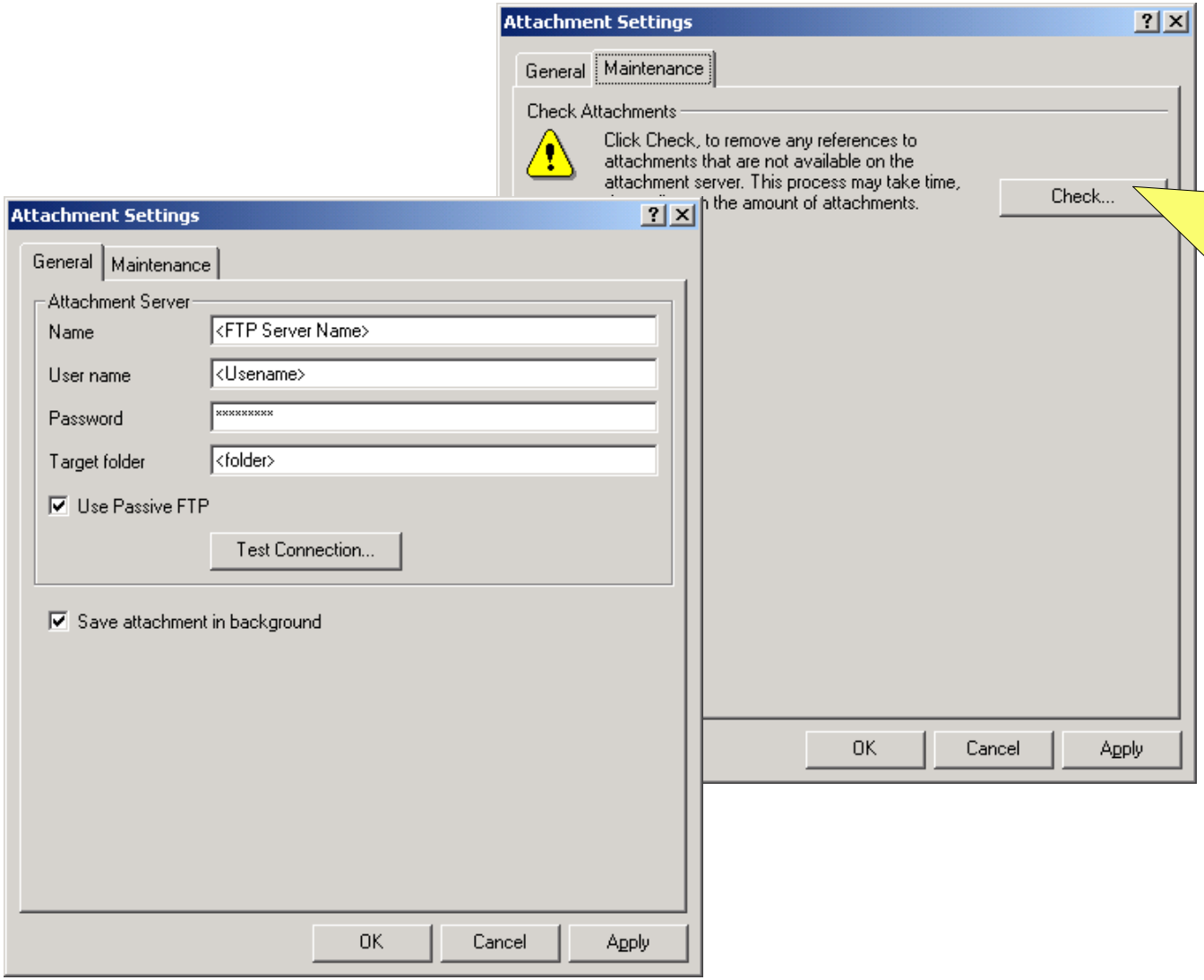
System Panel → Attachment Settings



Deletes all references in records to attachments not existing on the ftp server

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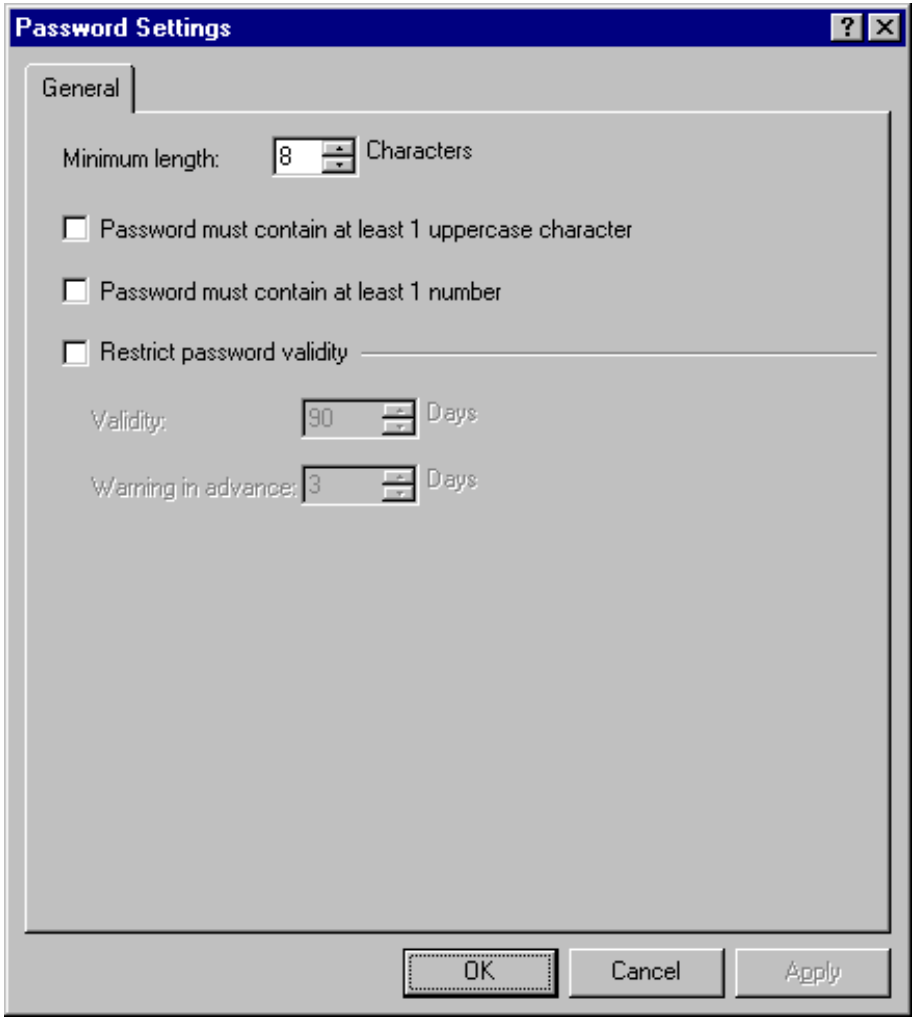
System Panel → Password Settings



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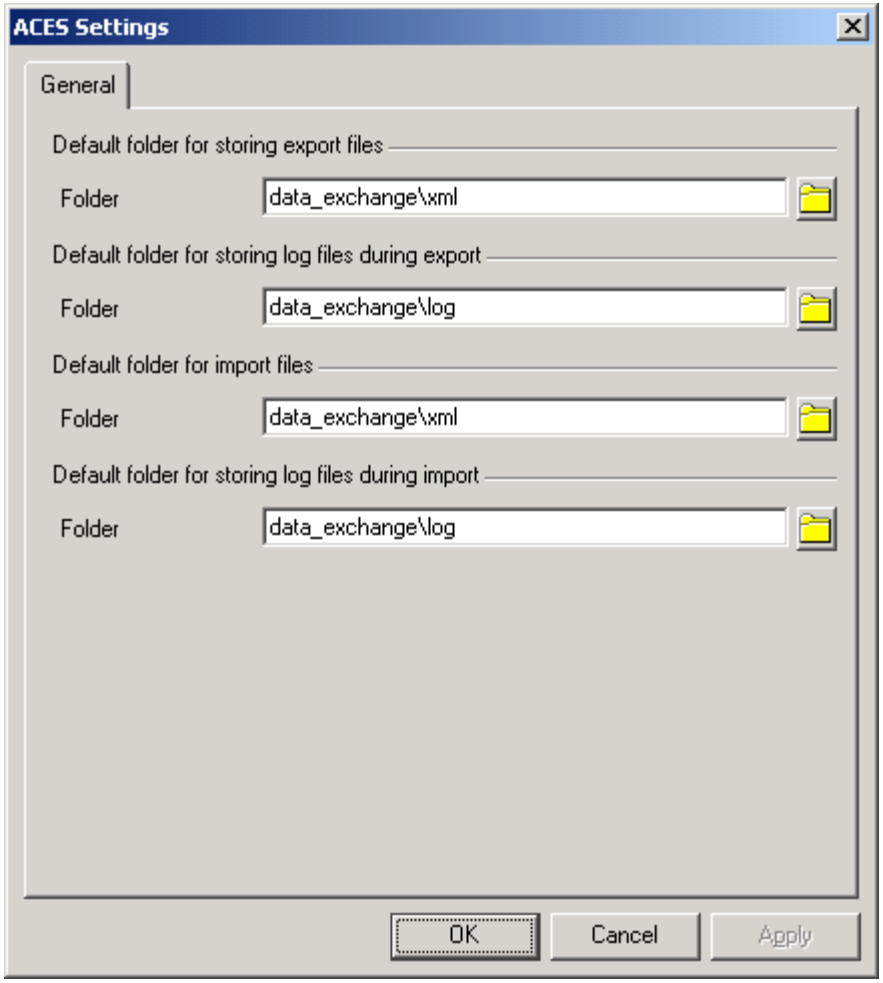
System Panel → ACES Settings



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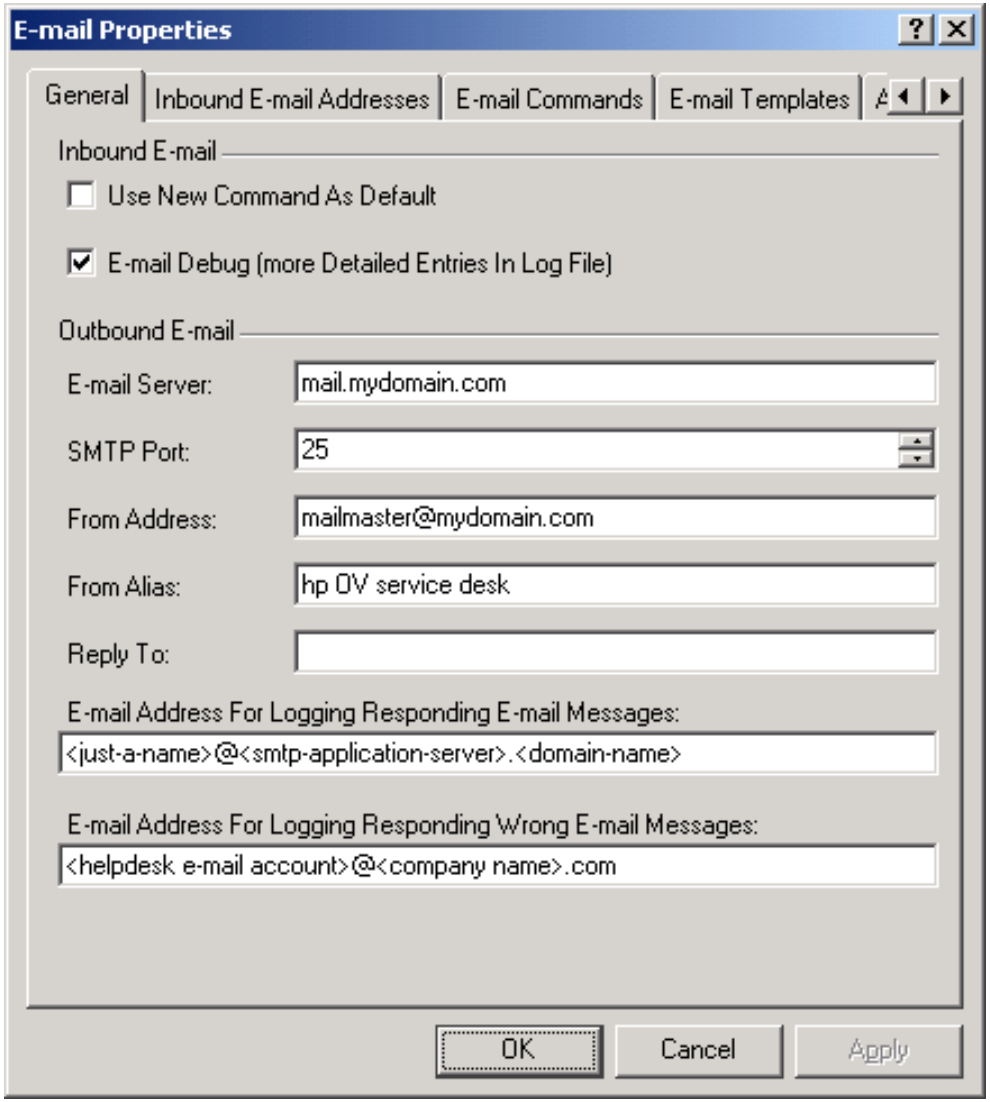
System Panel → E-mail – "General"



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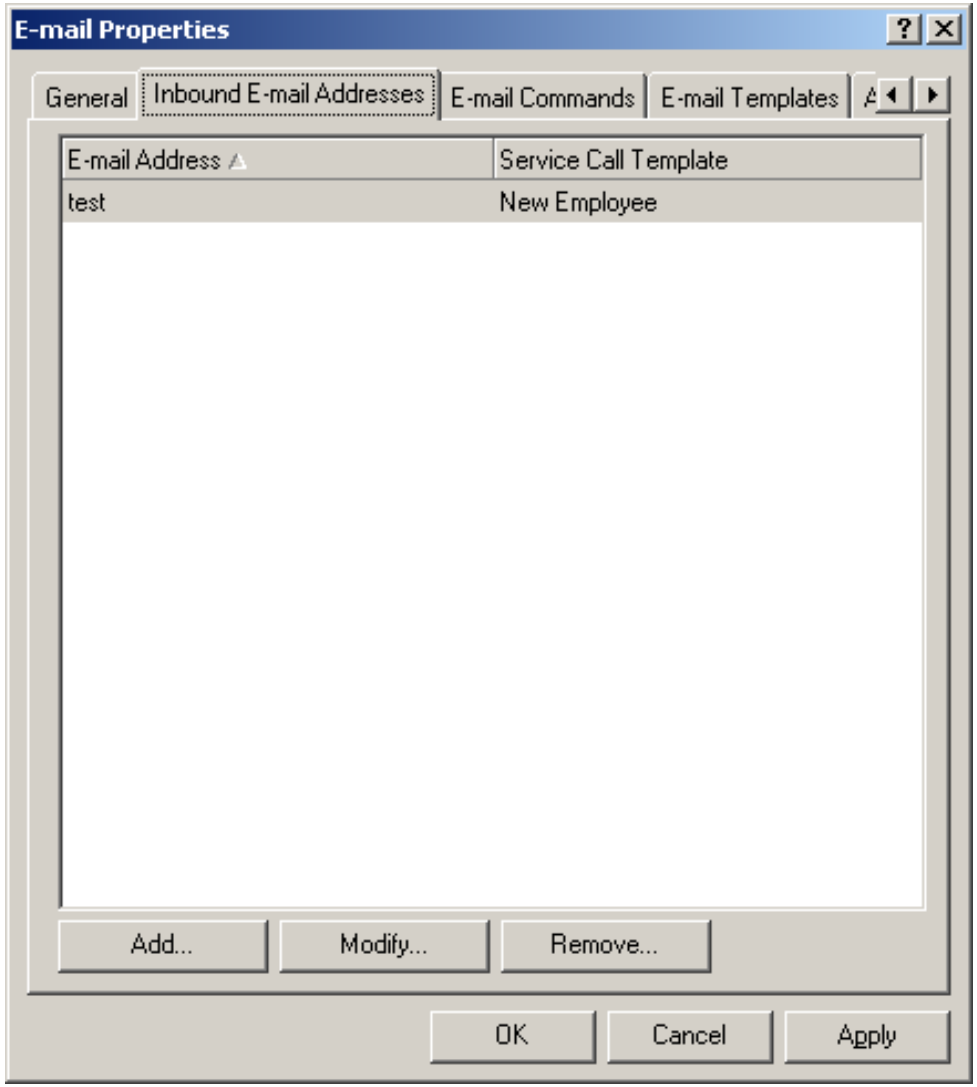
System Panel → E-mail – "Inbound Addresses"



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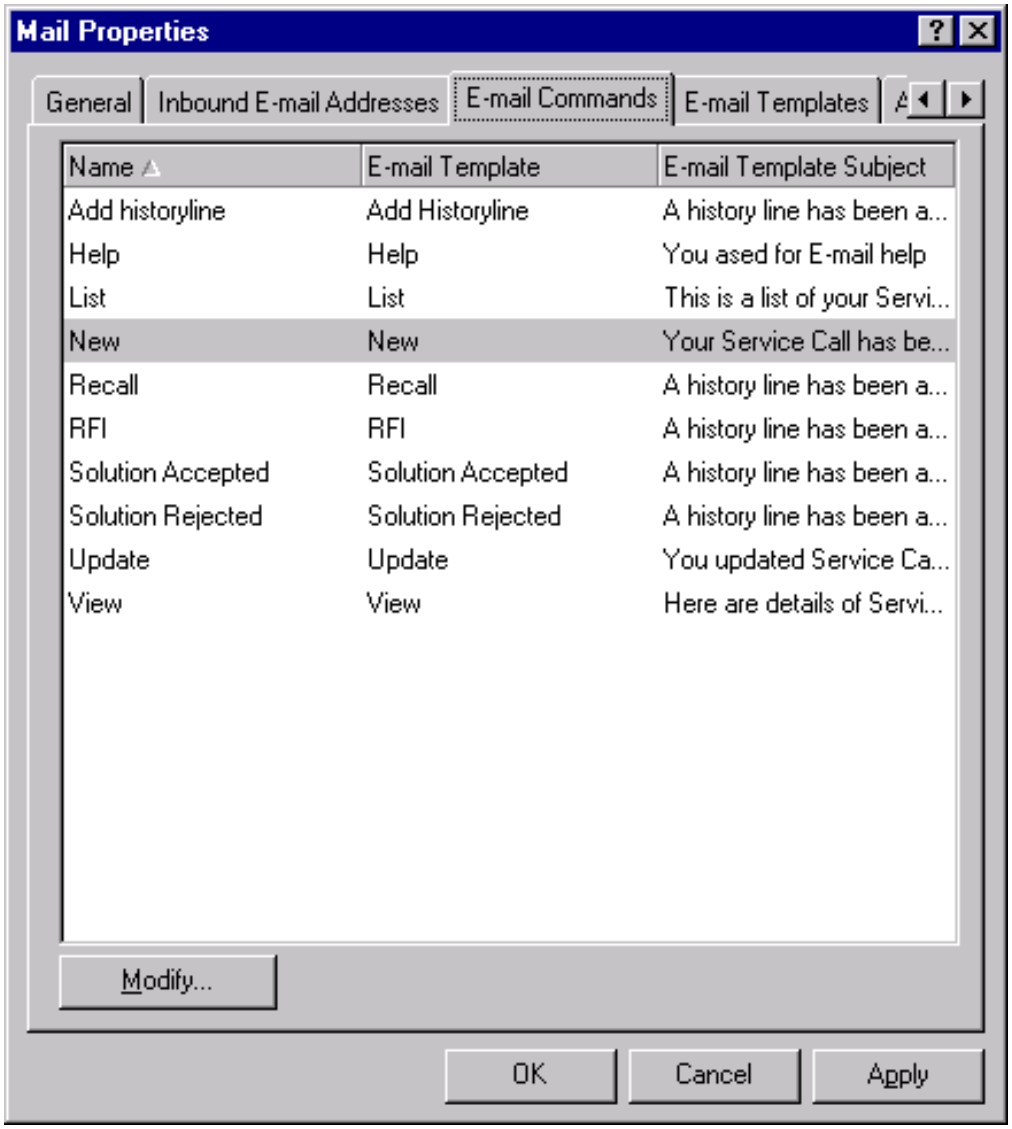
System Panel → E-mail – "Commands"



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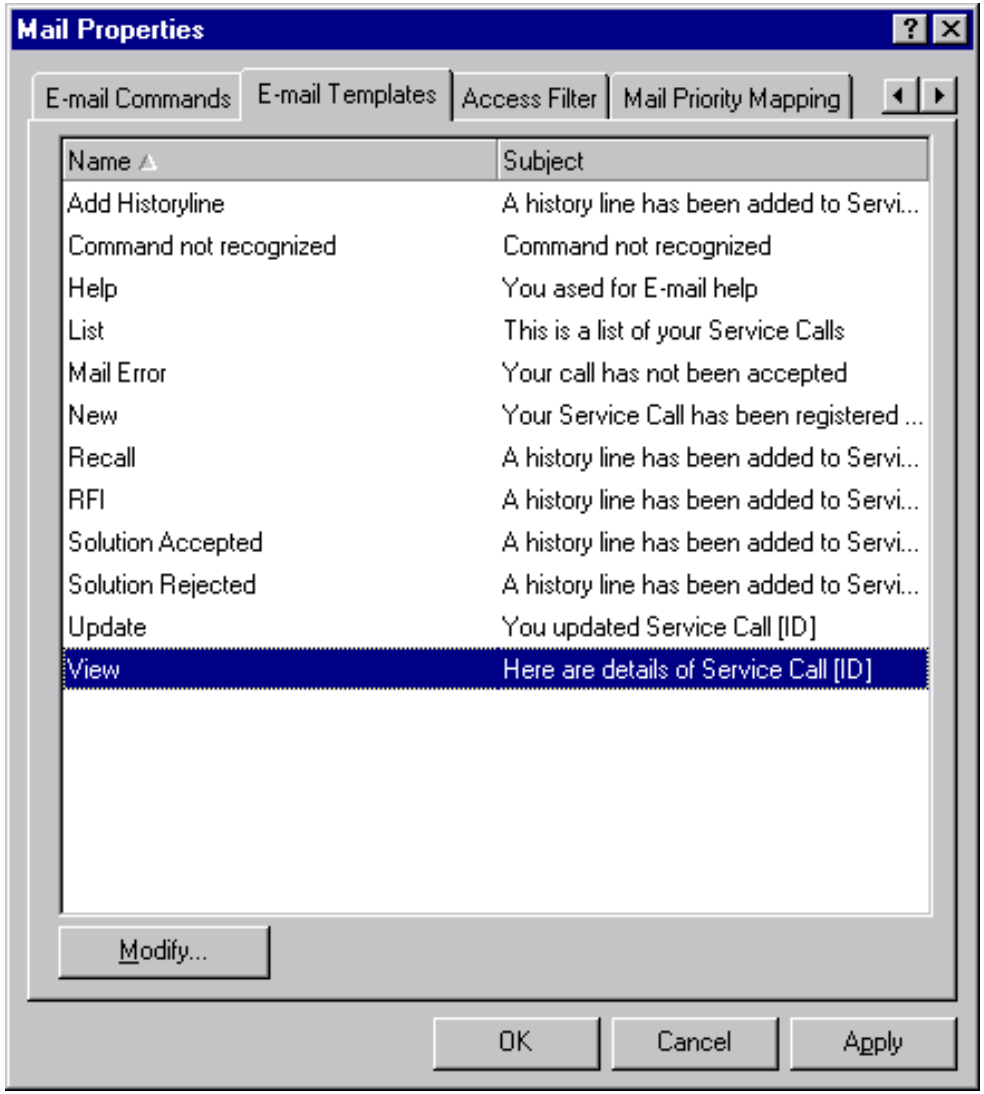
System Panel → E-mail – "Templates"



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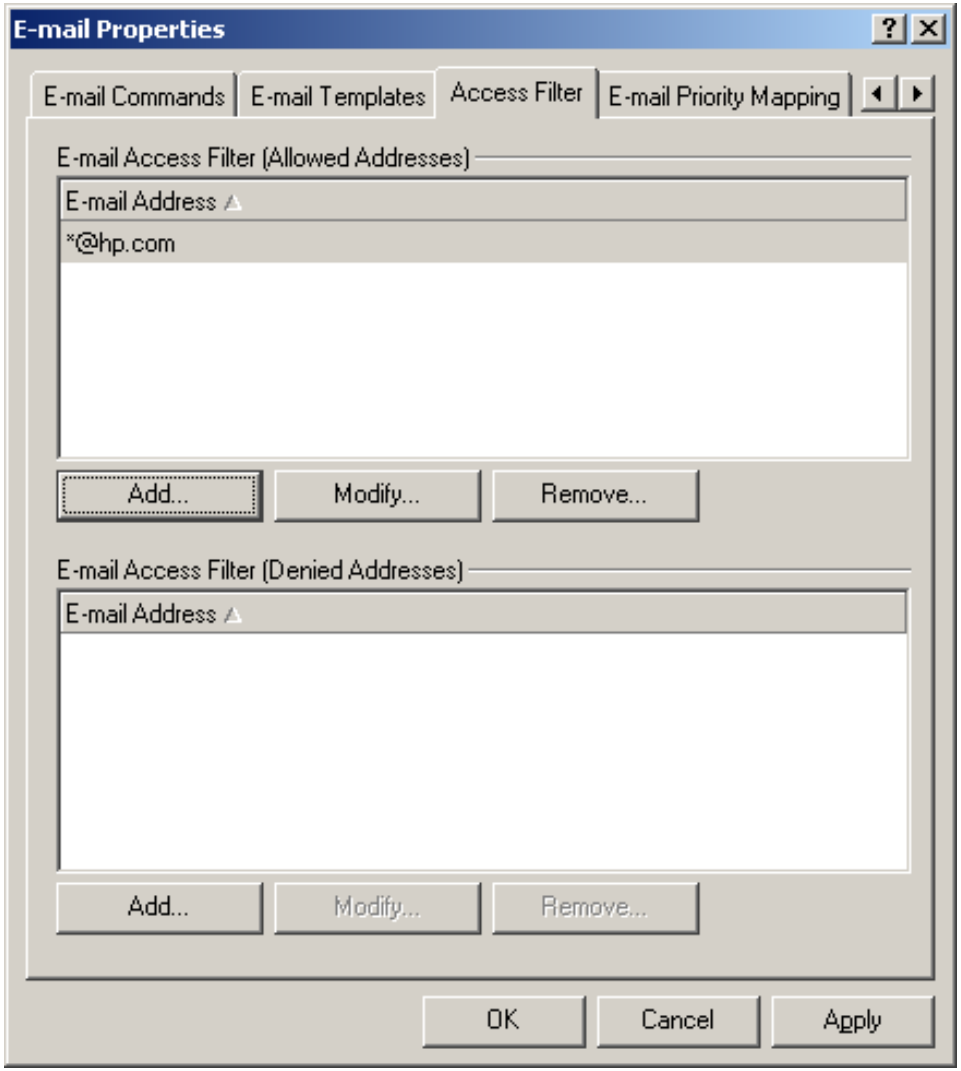
System Panel → E-mail – "Access Filter"



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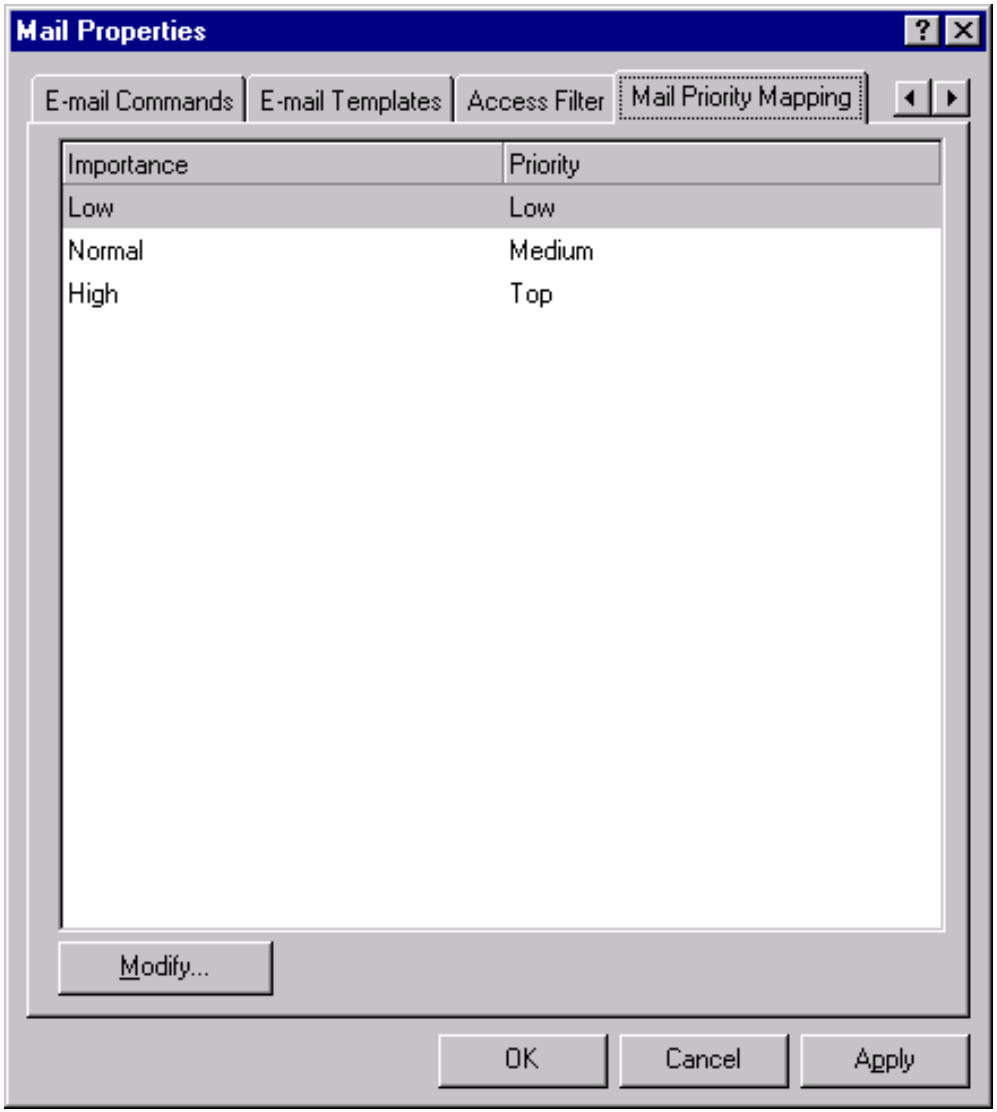
System Panel → E-mail – "Priority Mapping"



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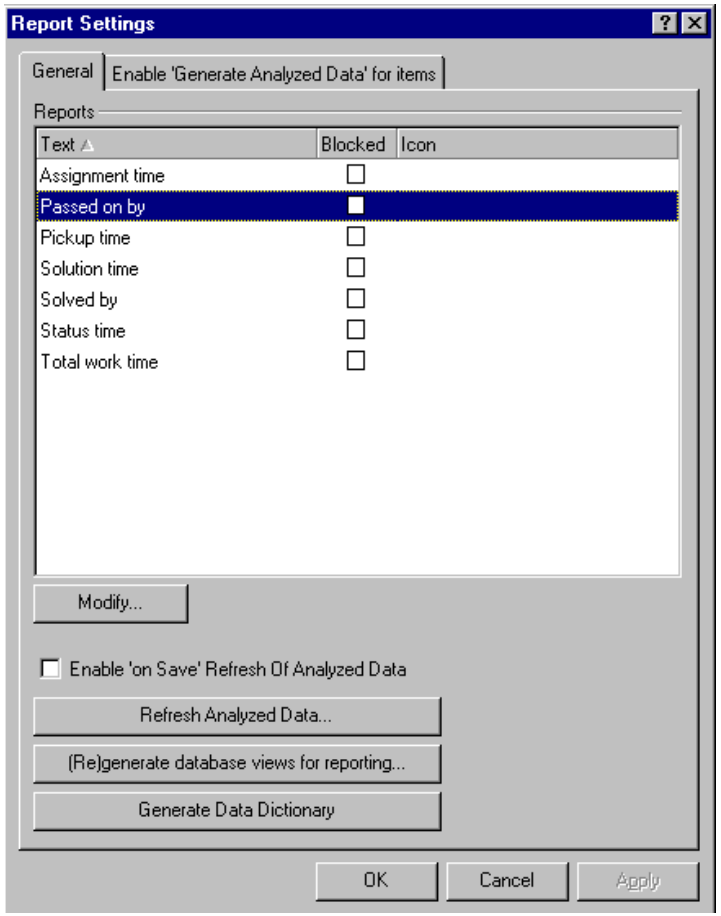
System Panel → Report settings – "General"

Generating Analyzed Data

This can be done in two ways:

- Batch mode
- On-save mode



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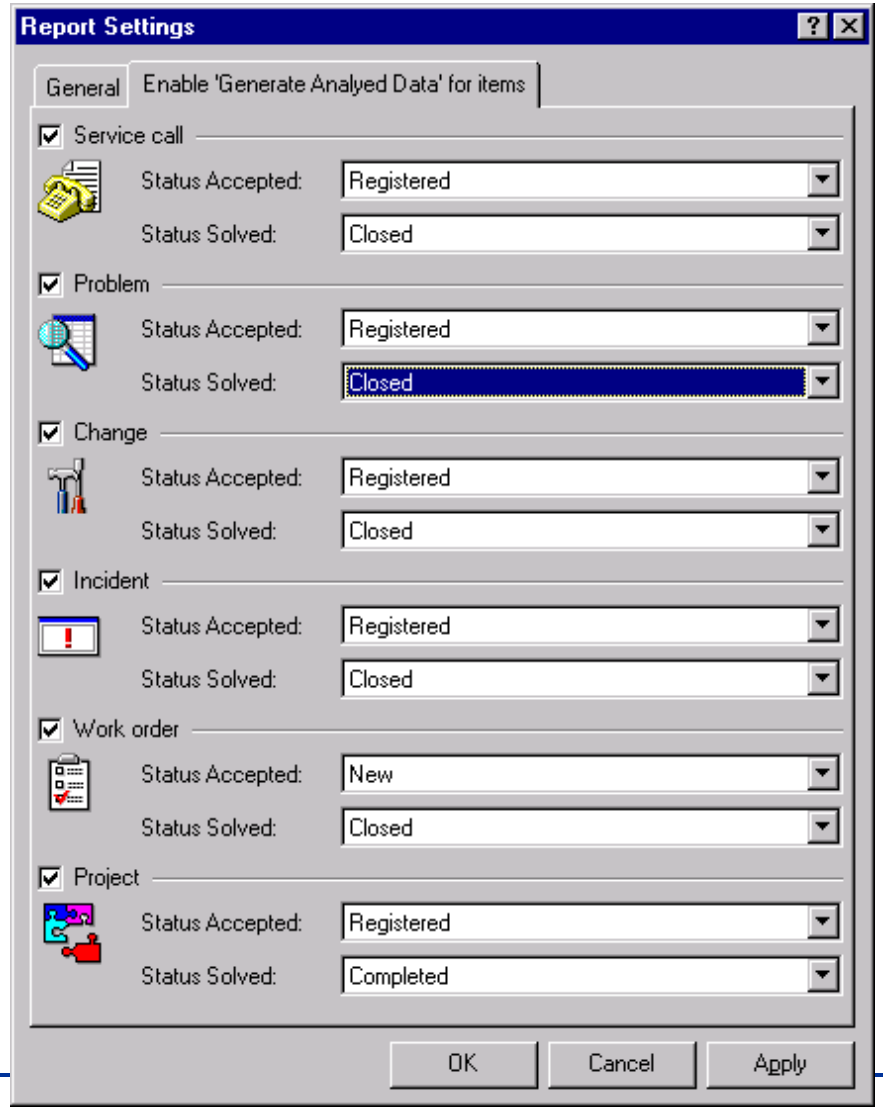
System Panel → Reporting Settings – "Enable 'Generate Analyzed Data' for Items"

Configure Analyzed Data



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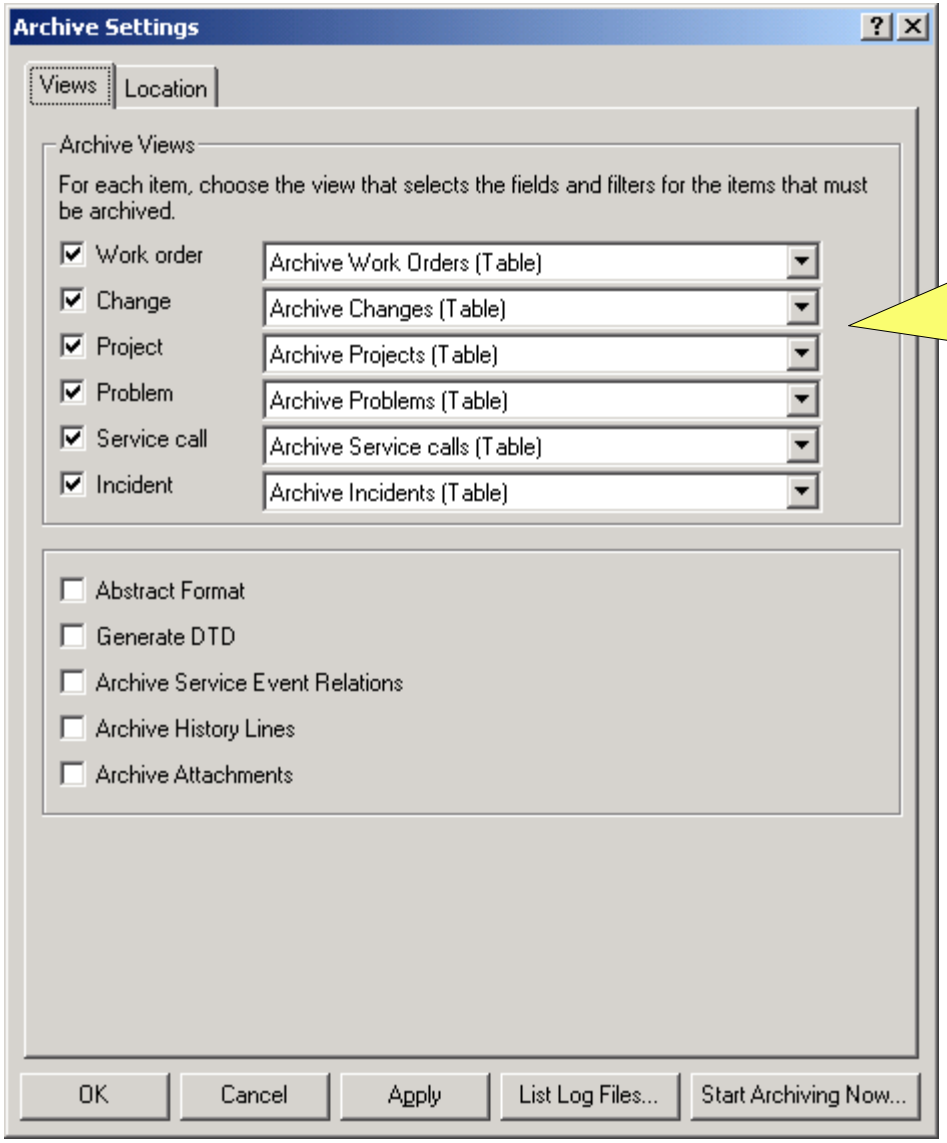
System Panel → Archive settings – "Views"



Views define the criteria for archiving (filter) per item and the fields that are archived per item

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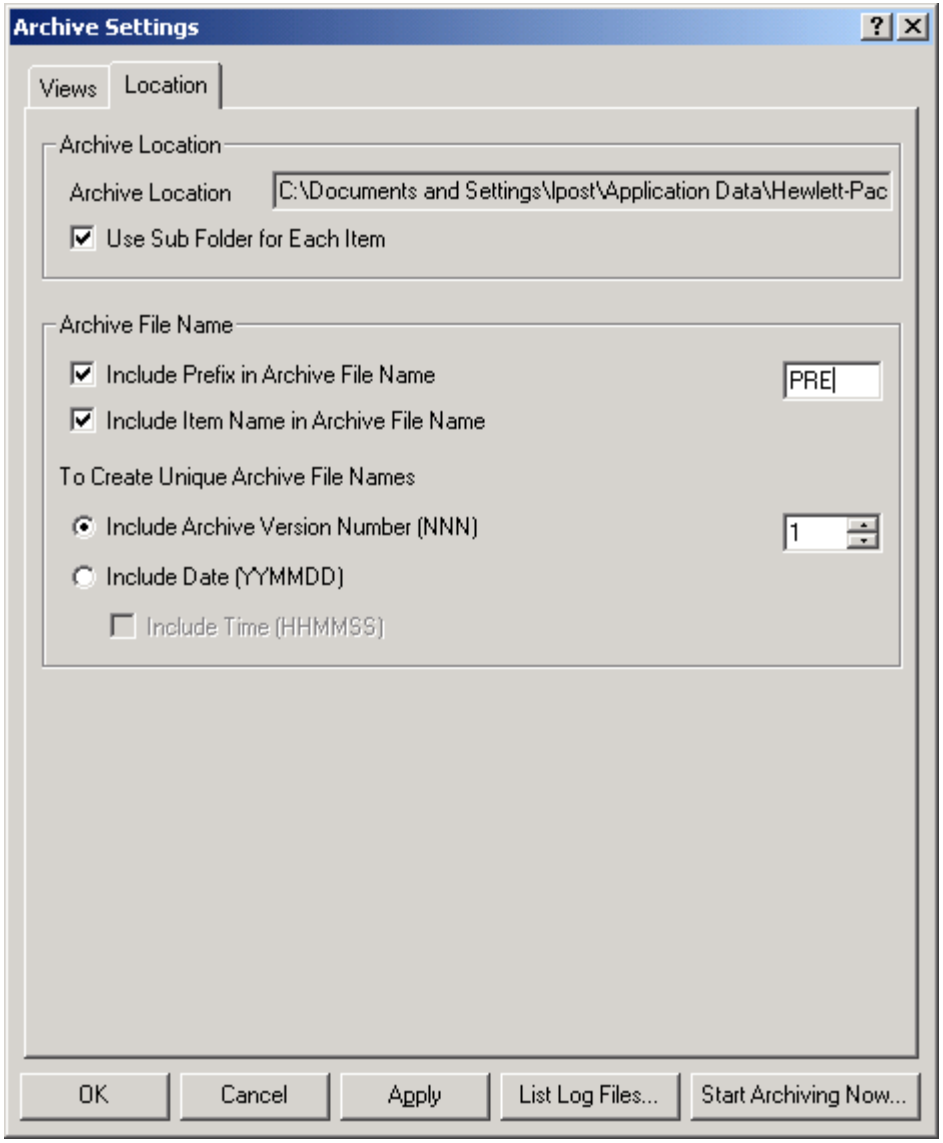
System Panel → Archive Settings- "Location"



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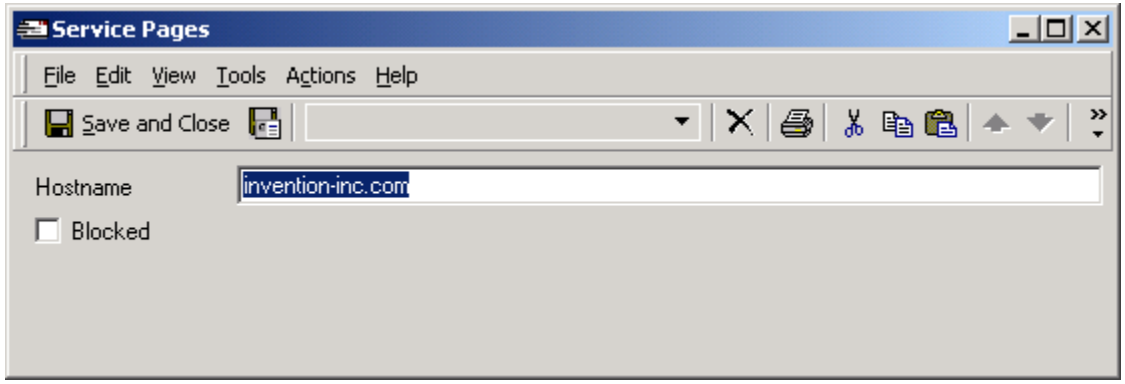
Service Pages → Access → E-mail hostnames

- E-mail address with these extensions (the part after the '@' sign, e.g. 'hp.com') are allowed to create their own accounts for Service Pages through their browser



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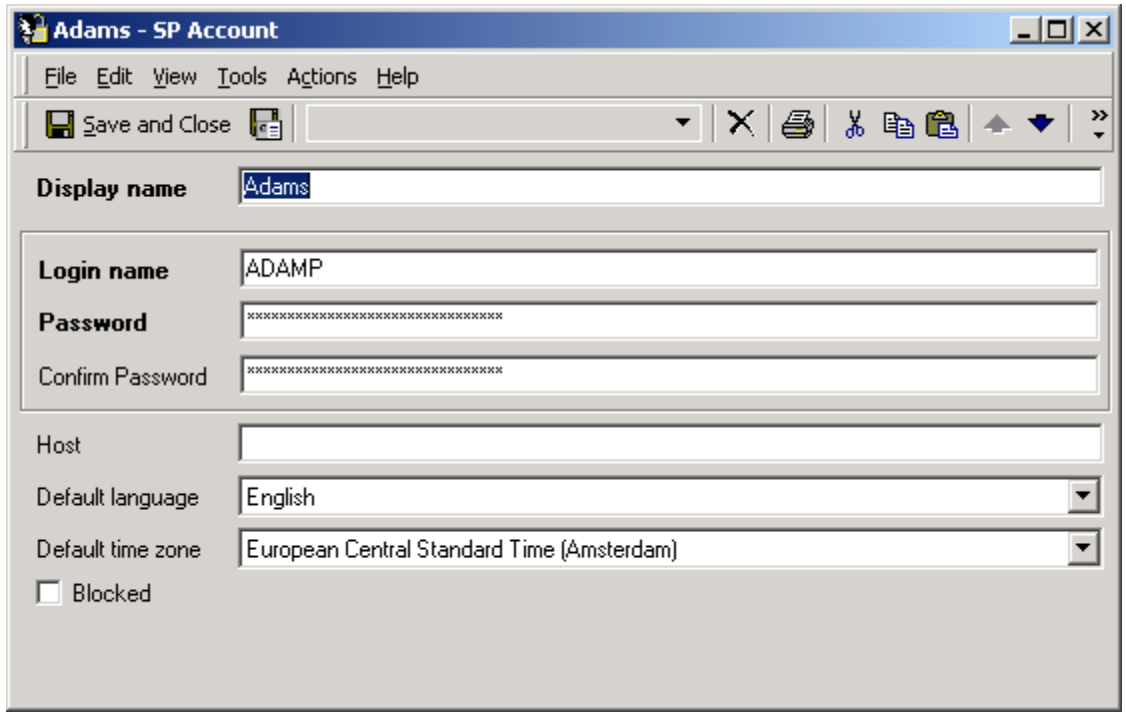
Service Pages → Access → SP Account

- SP Accounts have access to the Service Pages only
- Automatically linked to 'Service Pages' role
- This role only pertains to service calls
- Configure Views and View Settings for SP End User



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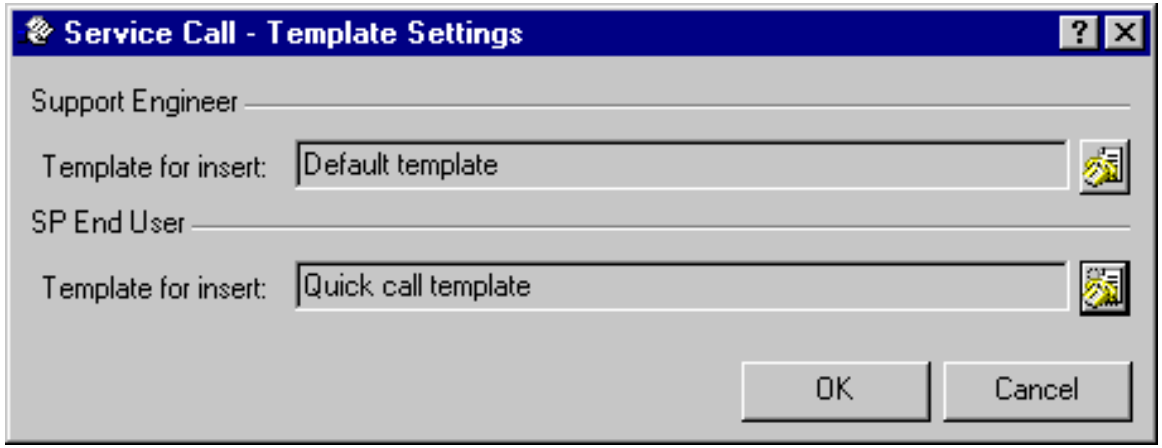
Service Pages → Data → Template Settings

Choose which templates are to be used for Specialists (which have SD Application Accounts) and SP End Users (which have SP Accounts) for inserting new records



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Service Pages → Presentation → View Settings → Views

Administrator Console - configure

Service Call - View Settings

Views for Support Engineer

Restricted list: Caller-SC SP View (SPView)

Full list: SC SP View (SPView)

Views for SP End User

Restricted list: Caller-SC SP View (SPView)

Full list:

OK Cancel

Service Pages - use

Welcome Brink
Organization: Invention Incorporated
Location: USA02
Telephone: 1343 43324 423
E-mail address: @invention-inc.com

Timezone: EST
Language: eng (USA)

Menu

New service call

Service calls (full list)

Service calls (restricted list)

Service call (full list)

Registered	ID	Description	Category	Priority	Impact	Configuration Item	Service	Deadline
Jul 19, 2002 11:37:07 AM	171	need sd training	RFT Request for training	Low	Low (1 person affected)		Desktop	Jul 23, 2002 11:00:00 AM
Jul 19, 2002 11:35:58 AM	170	jam on printer PRT123	Incident	Medium	Medium (Group / Unit affected)		Desktop	Jul 22, 2002 11:35:58 AM

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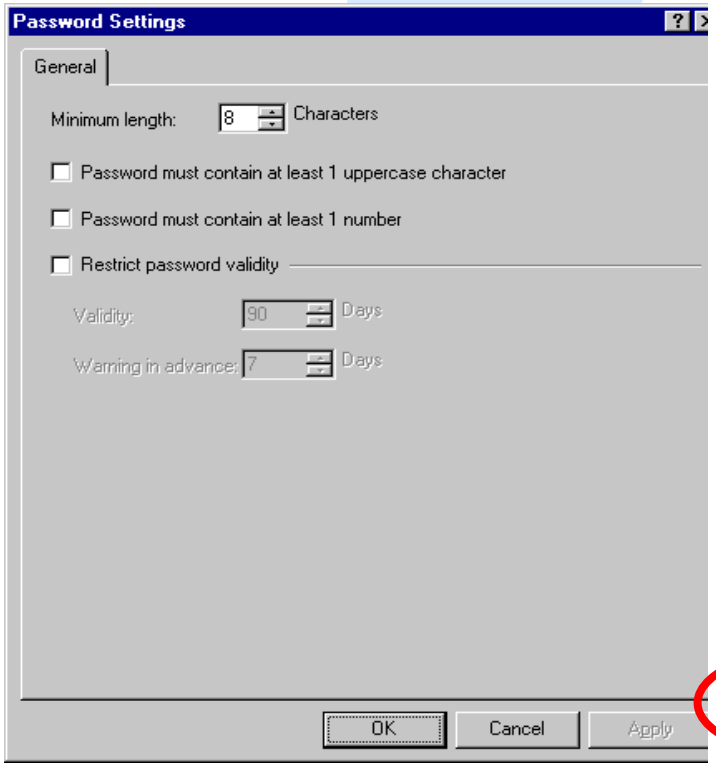
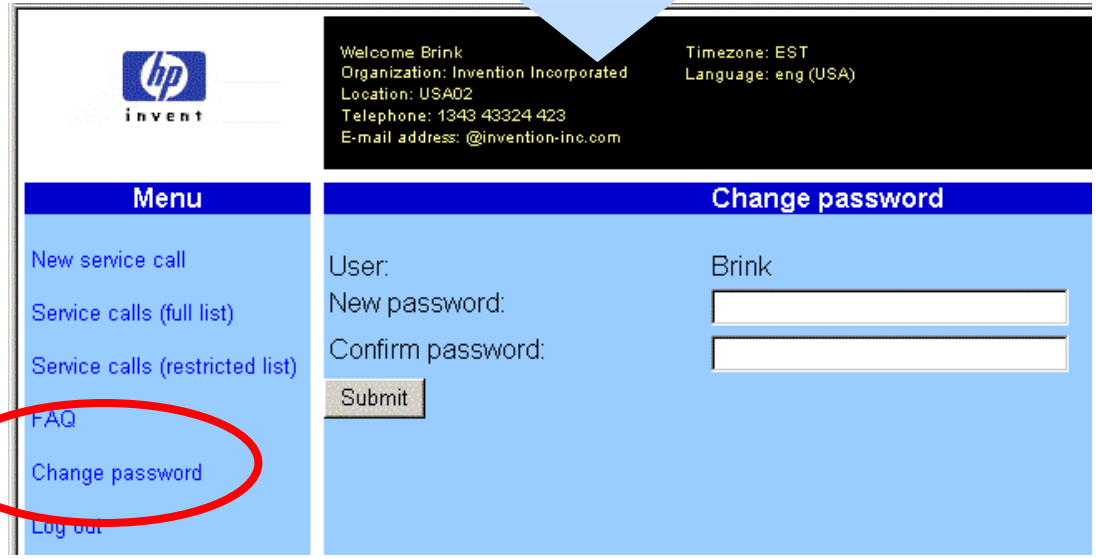
Service Pages → System Panel → Password Settings

Administrator Console - configure



Service Pages - use



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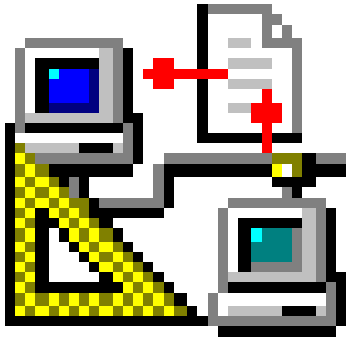
Let's:

- go see the tool…
- do some exercises…
- have a break…

Technical Implementation



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Topics

- Architecture: physical and logical
- The players: Database server, Application server, GUI Client, Service Pages Client, Agent
- Environment options
- Integration
- Installation overview

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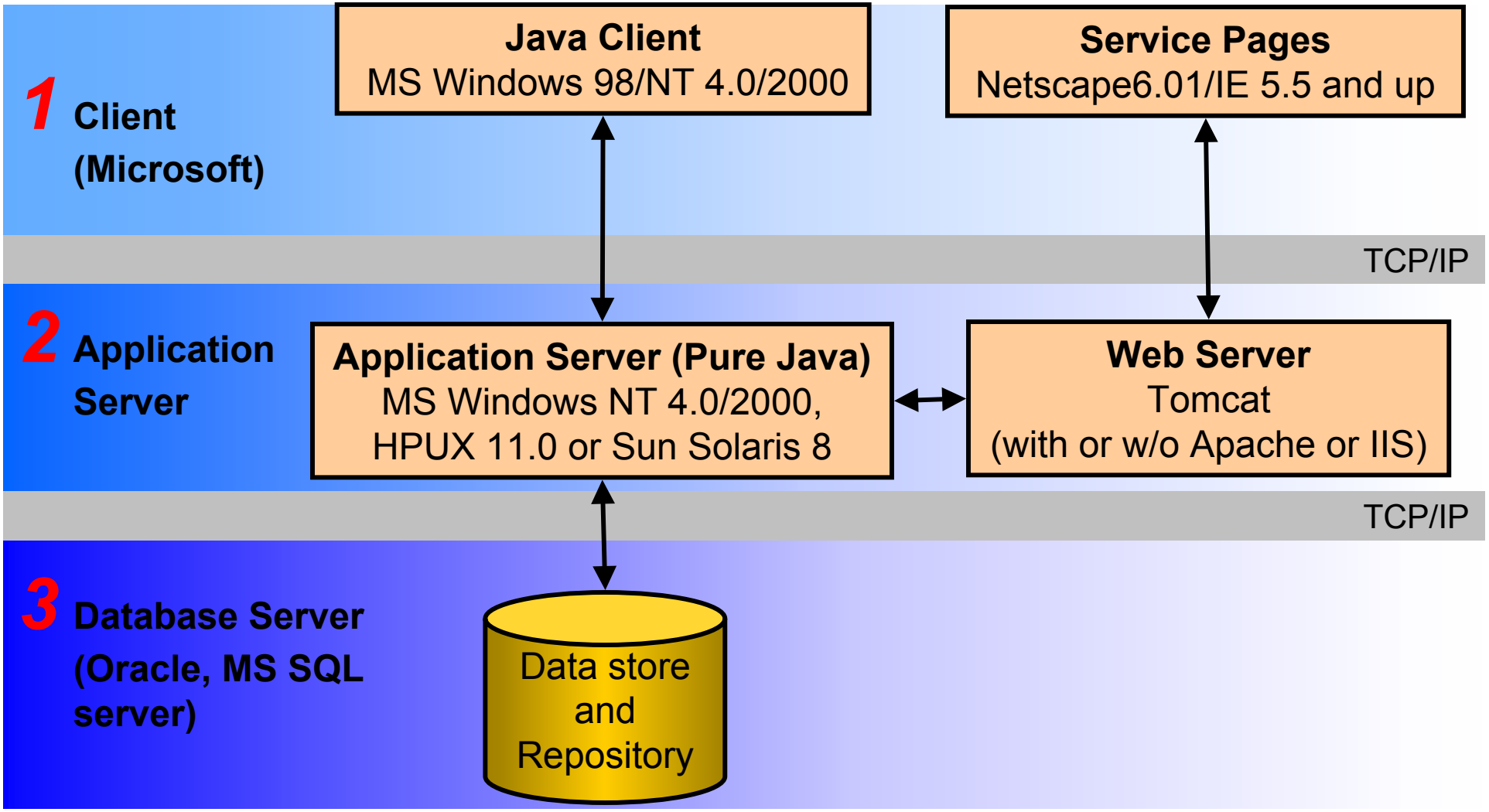
Three-Tier Physical Architecture



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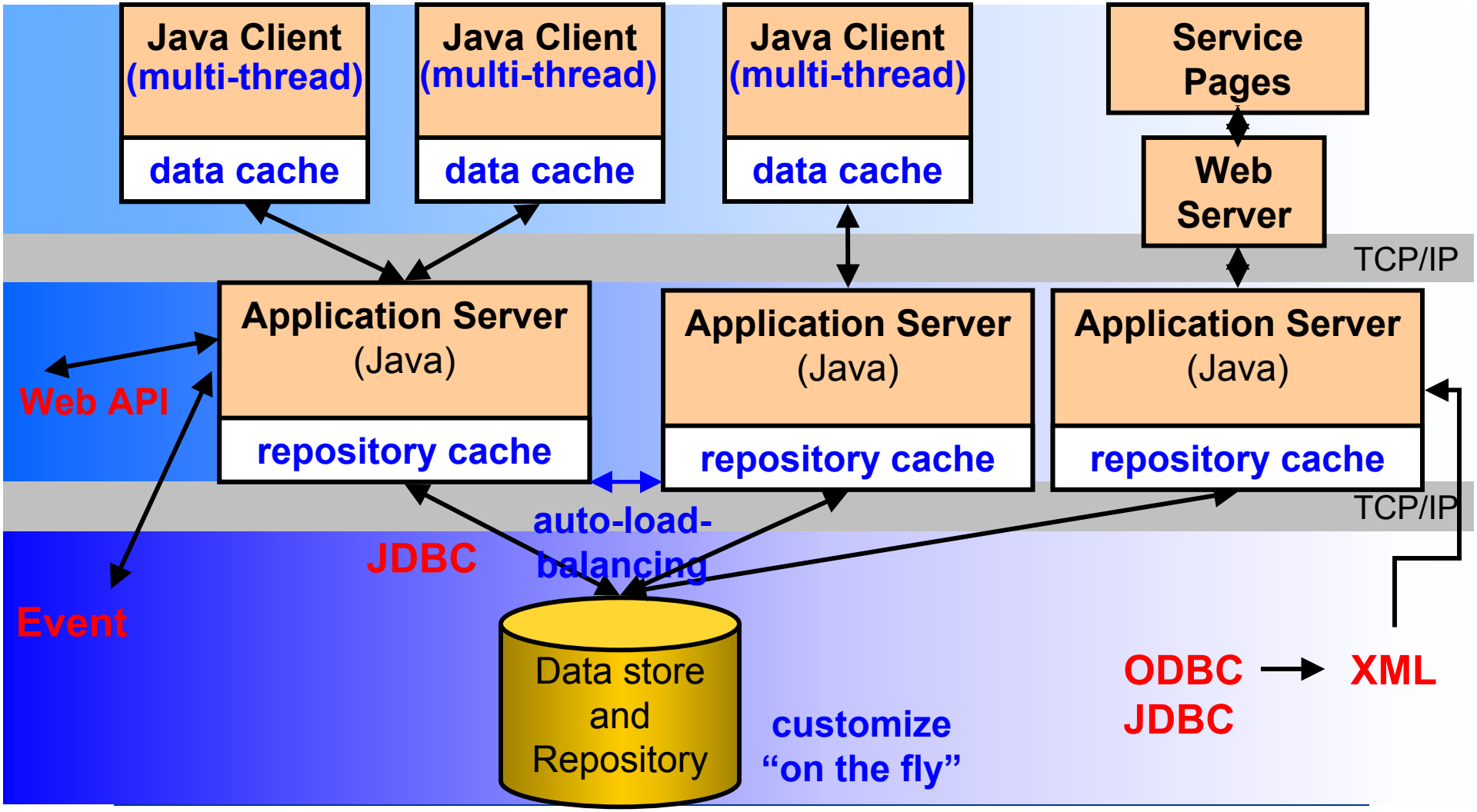
Open and Scalable



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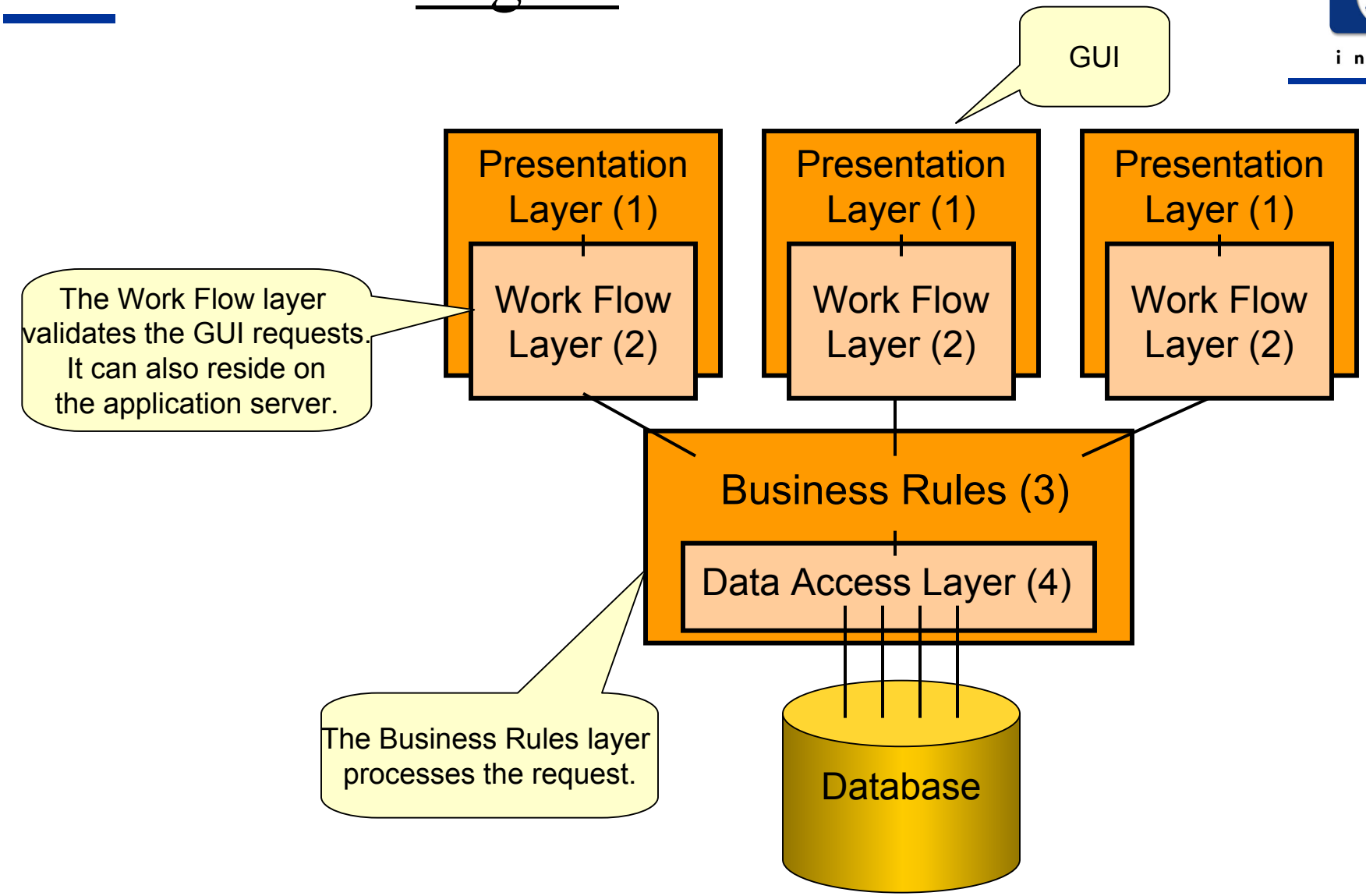
Four-Tier Logical Architecture



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The players: Database Server

- **Software: Oracle 8.1.7, 9i or Microsoft SQL Server 2000**
- **Hardware specifications: contact Oracle specialist**
- **Network connection TCP/IP, 10 Mb/s**
- **Database sizing: see calculation excel sheets in doc folder on CD and Administrator's Guide**

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The players: Application Server

- **Platforms:**
  - MS Windows NT4.0 SP6a
  - MS Windows 2000 SP2
  - HP-UX 11.0
  - Sun Solaris 8

  Application Server GUI, SP, Data Exchange via command line, Database Configuration Wizard
- **Hardware Windows**:
  - Pentium III 550Mhz, 512Mb RAM, 80 Mb free disk space, TCP/IP
- **Hardware HP- UX:**
  - PA-RISC 8600/500MHz/1GB or PA-RISC 8500/400MHz/512 MB, TCP/IP
- **Hardware Sun Solaris**
  - Ultra SPARC IIE/500MHz/1 GB, TCP/IP
- **Multiple servers possible**
  - load-balancing
  - fail-over
- **Mix of platforms possible**

.

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The players: GUI Client

- Platforms:
  - MS Windows 98*, MS Windows NT4.0 Workstation SP6a, MS Windows 2000 Professional SP2, XP, WBT based on Windows 2000 Advanced Server
- Hardware MS Windows 2000:
  - Pentium II, 300 Mhz, 128 Mb RAM, 55 Mb free disk space, TCP/IP, 28.8 K (56K or up recommended)
- Hardware MS Windows NT4 and 98
  - Pentium Pro, 200 Mhz, 128 Mb RAM, 55 Mb free disk space, TCP/IP 28.8K (56K or up recommended)
- Multiple client sessions on one machine are possible
  - to different application servers that connect to different database servers (only possible when one SD version is used)

* W98 not recommended for Administrator Console use due to performance issues in Windows

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The players: Service Pages client

- Platform
  - Any platform capable of running:
    - **Microsoft Internet Explorer 5.5**
    - **Netscape Navigator 6.01**

- Hardware
  - Pentium 90 Mhz (166 Mhz or up recommended), 32 Mb RAM, TCP/IP, 28.8 K (56K or up recommended)

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The players: Agent

Used to execute command line actions from database rules on the local host or on remote hosts, e.g. updating events in OVO based on information in Service Desk.

- Platforms:
  - MS Windows 98, NT4.0, 2000, XP
  - HP-UX 11.0
  - Sun Solaris 8
- Hardware:
  - 200 Kb disk space

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Environment Options

- Multiple application servers
- Load-balancing and fail-over
- Inbound email
- Service Pages web server
- Integration options

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Environment options: Multiple Application Servers

Use multiple application servers when you …

- have a large number of users (> 100)
- require a fail-over architecture
- make intensive use of data exchange or other integration options (use the additional application server as a dedicated server)

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Environment options: Load-balancing and Fail-over

- Load-balancing is used to divide GUI client connections over two or more application servers.
  - to allow for differences between application servers in terms of performance or task load
  - weighting is defined in server settings editor

- Fail-over results in a robust environment
  - clients are automatically routed to another application server in case of failure

Both of these options only apply in an environment with multiple application servers

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Environment options: Inbound Email

- Service Desk application server can serve as a mail server and accept email from any standard SMTP based email application
- Information in email determines how it is processed based on settings in the SD Administrator Console

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Environment options: Service Pages web server

- Service Desk uses the Tomcat servlet engine
  - comes with SD software
  - automatic installation and minor configuration
- Additional web server such as Apache or IIS not necessary, but possible
- Can run on application server or dedicated server

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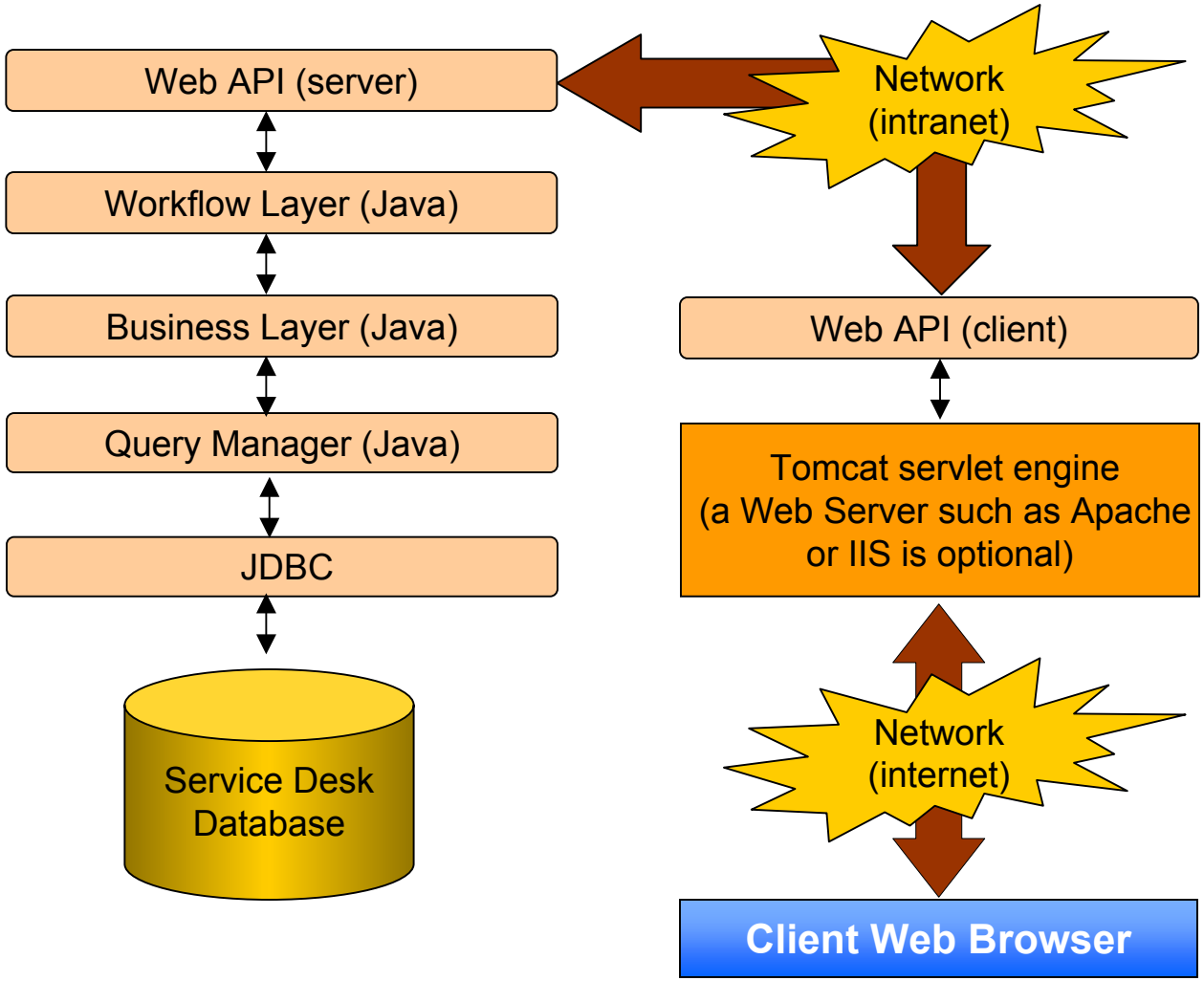
Service Pages — Data Flow



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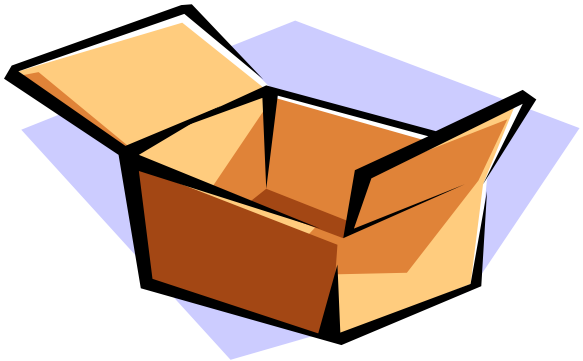
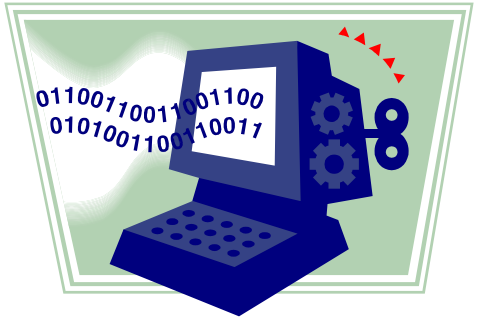
Integration

- Out-of-the-box integrations



- Open interfaces



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Out-of-the-box integrations

• HP OV Operations for Windows 6.1, 7	event+inventory
• HP OV Operations for Unix 6.01, 7	event+inventory
• HP OV Network Node Manager 6.2, 6.3	event+inventory
• HP OV Service Navigator	service monitoring
• HP OV ManageX 4.23	event
• Microsoft Operations Management	event
• Radia/Novadigm	inventory
• LDAP	inventory
• SMS2	inventory
• HP OV Internet Services	configuration

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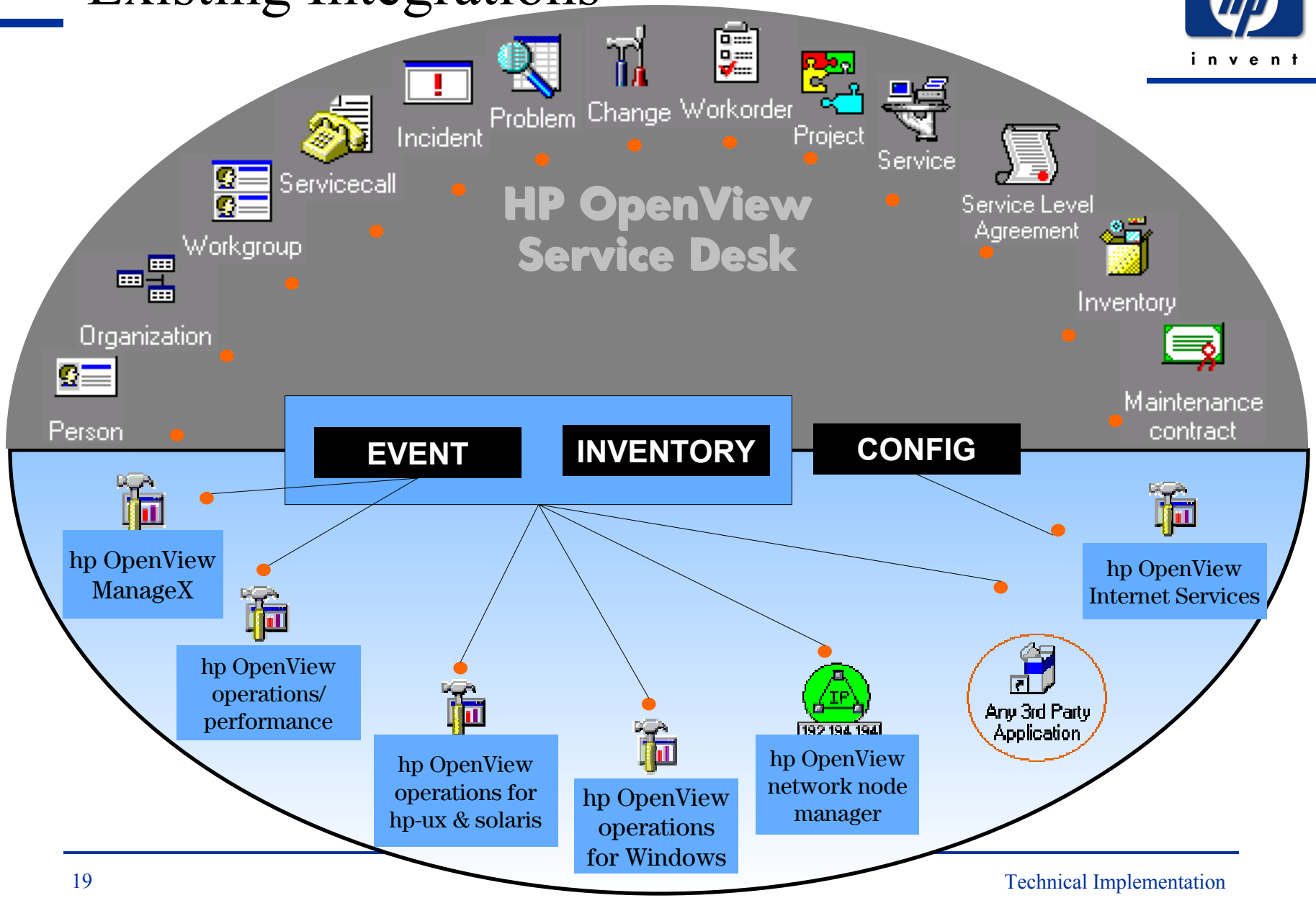
Existing Integrations



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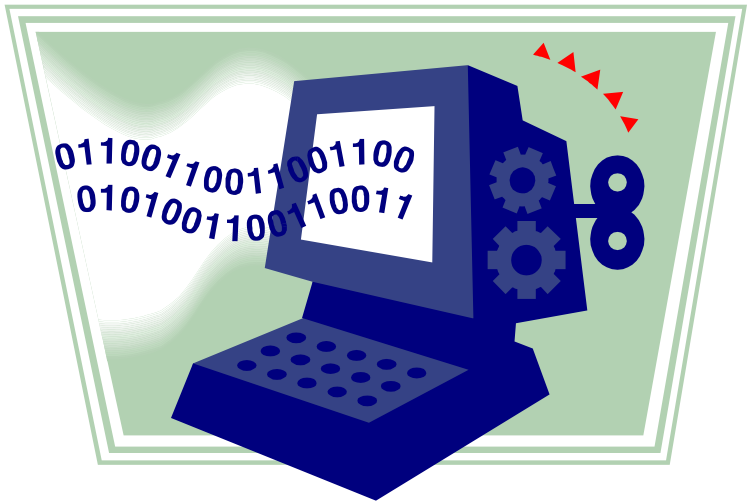
Open Interfaces

- Web API
- Command-line interface (to open forms)
- Data Exchange
- Service Events
  - inbound
  - outbound



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Web API

- **Web API**

  Interface that consists of pure java classes that enable programmers to access and manipulate Service Desk data

- **The Web API provides the following functionality:**
  - Initializing and shutting down the API
  - Creating Service Pages accounts
  - Starting and stopping Service Desk API sessions
  - Finding entities
  - Retrieving entity information
  - Creating entities
  - Updating entity information
  - Getting meta information
  - Logging the usage of the API and the actions performed by the API

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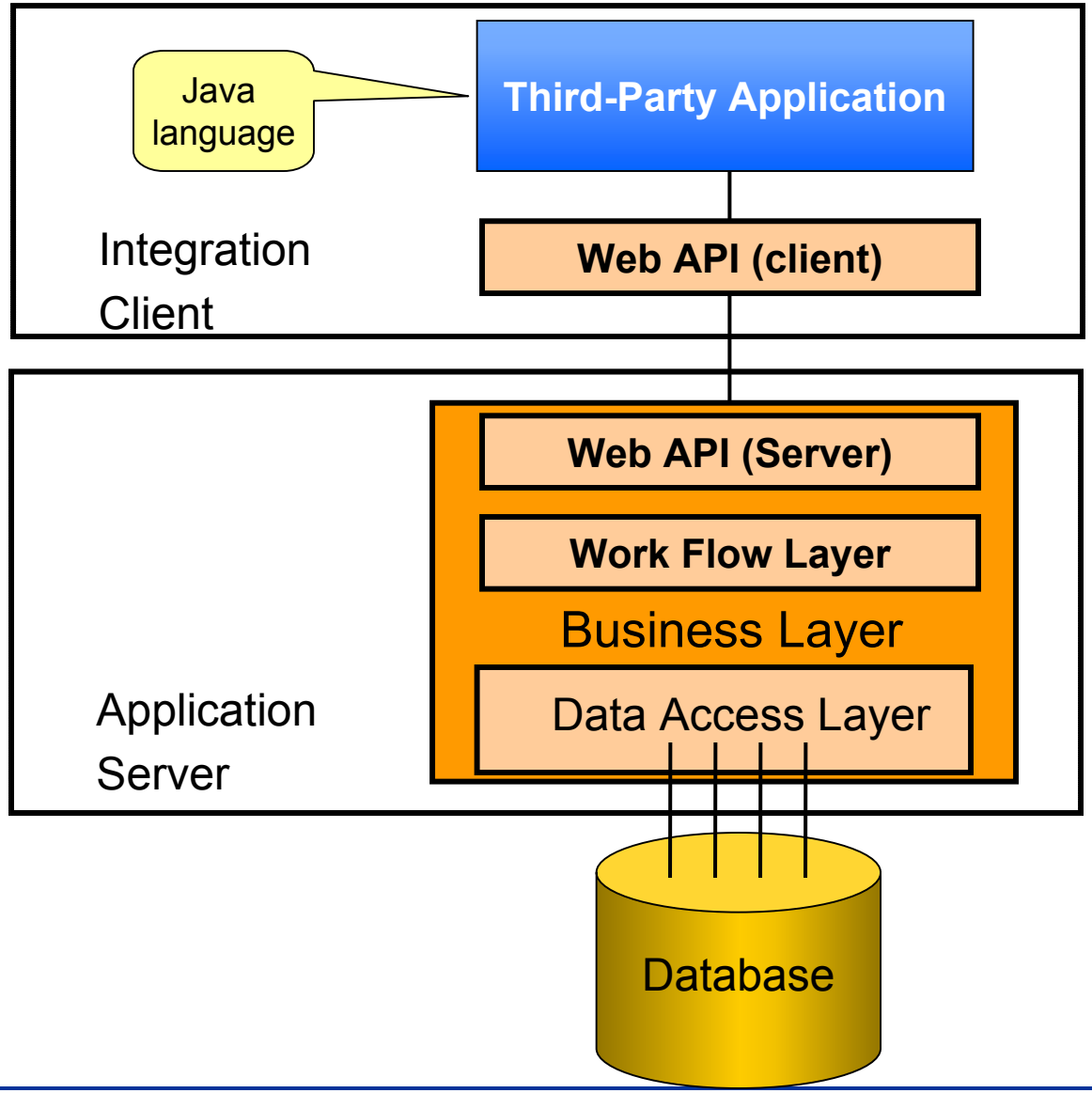
Web API — Data Flow



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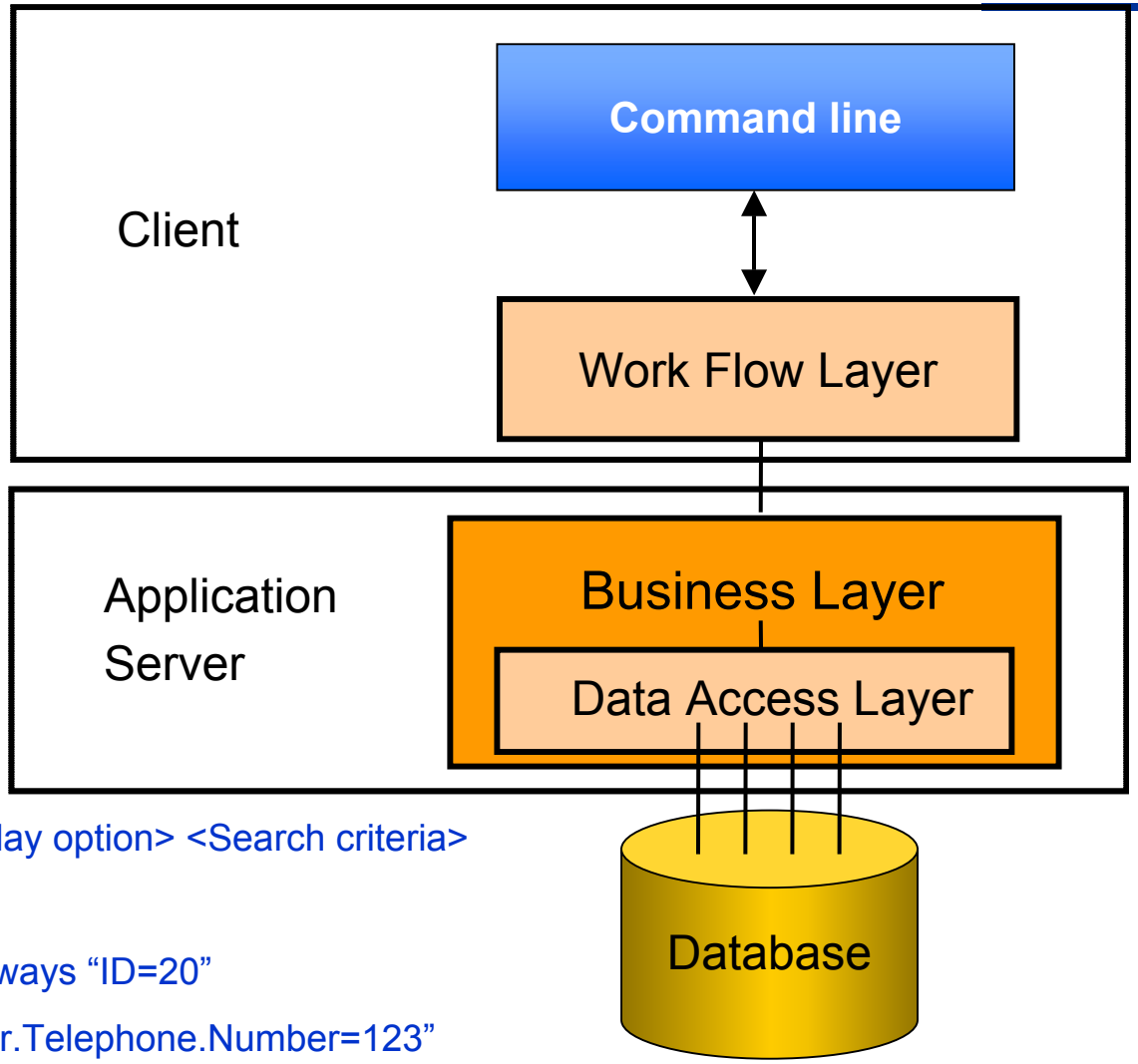
Command line interface

Enables opening of forms using a command line on Service Desk clients, e.g. for CTI integrations.



SD_DataForm.bat

Format:

SD_DataForm <Form name> <Display option> <Search criteria>

Example:

SD_DataForm “Service call” –ListAlways “ID=20”

SD_DataForm “Service call” “+Caller.Telephone.Number=123”

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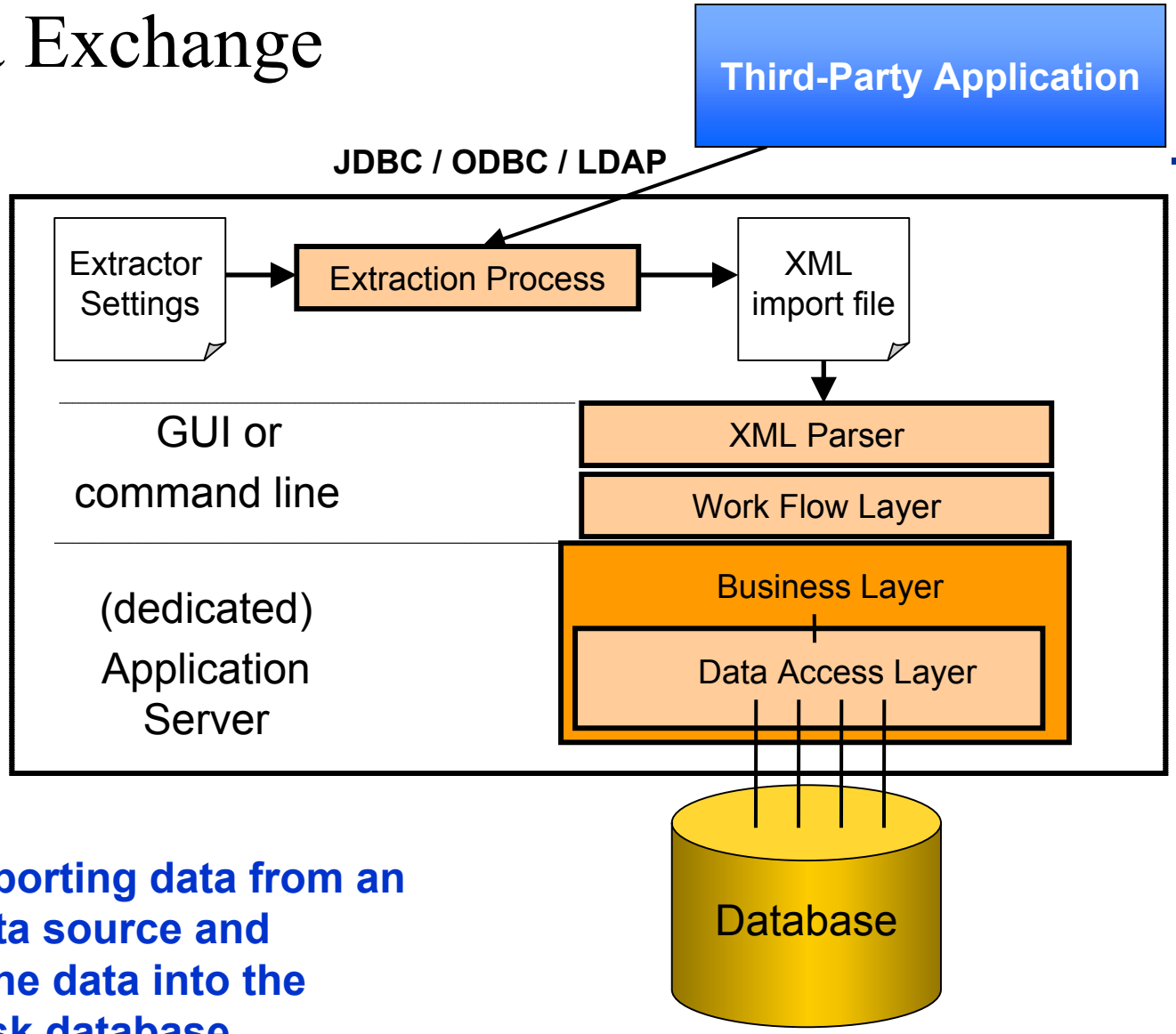
Data Exchange



Enables exporting data from an external data source and importing the data into the Service Desk database.

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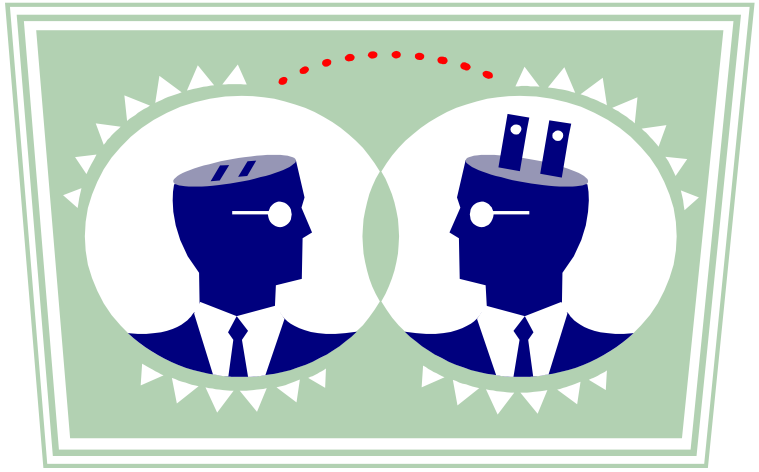
Data Exchange – Out-of-the-box

- Out-of-the-box sample extractors for
  - NNM (hp OpenView network node manager)
  - OVO (hp OpenView operations for Unix and Windows)
  - SMS (MS Systems Management Server)
  - LDAP (Lightweight Directory Access Protocol)
  - Radia Novadigm

- Other out-of-the-box options
  - Migration from HPOV IT Service Manager 5.7
  - Exporting and importing languages



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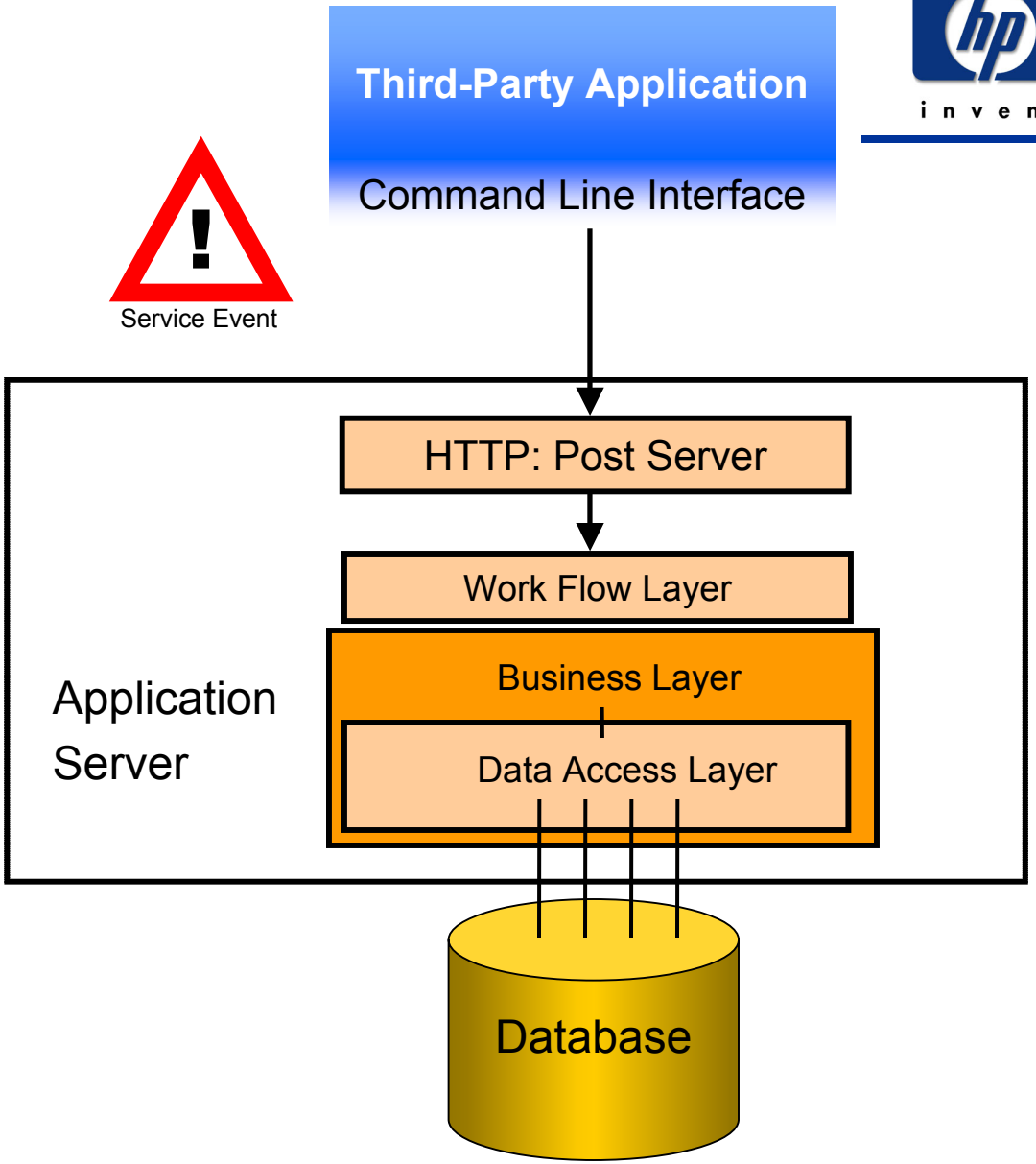
Service Events
Inbound

Enables inserting, updating and deleting individual records into Service Desk using a command line. Although generally used for incidents in event integrations, it can be used for any item.



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Service Event
Inbound

- **sd_event**

-l	*logfile*	*(name logfile)*
-e	error_*logfile*	*(name error logfile)*
-s	*server*	*(application server hostname)*
-p	*port*	*(default 30980)*
-a	*account/password*	*(e.g. system/servicedesk)*
-x	*mapping*	*(name of import mapping in SD)*
-c	*class*	*(name of class in import mapping))*
-m	*modus*	*(insert, update or delete)*
-v	*value_list*	*(source attribute name and value)*
-o	*onfail*	*(fail-over application server)*
-f	*configuration file*	*(initiation file, can hold values for l, s, p, a, x, c, m)*

E.g: sd_event -l sd_event.log -s northserver -p 30980 –a system/servicedesk -x external_event -c incident -m insert -v event_id=123 description=test -f southserver

or

sd_event –f sd_event.ini -v event_id=123 description=test

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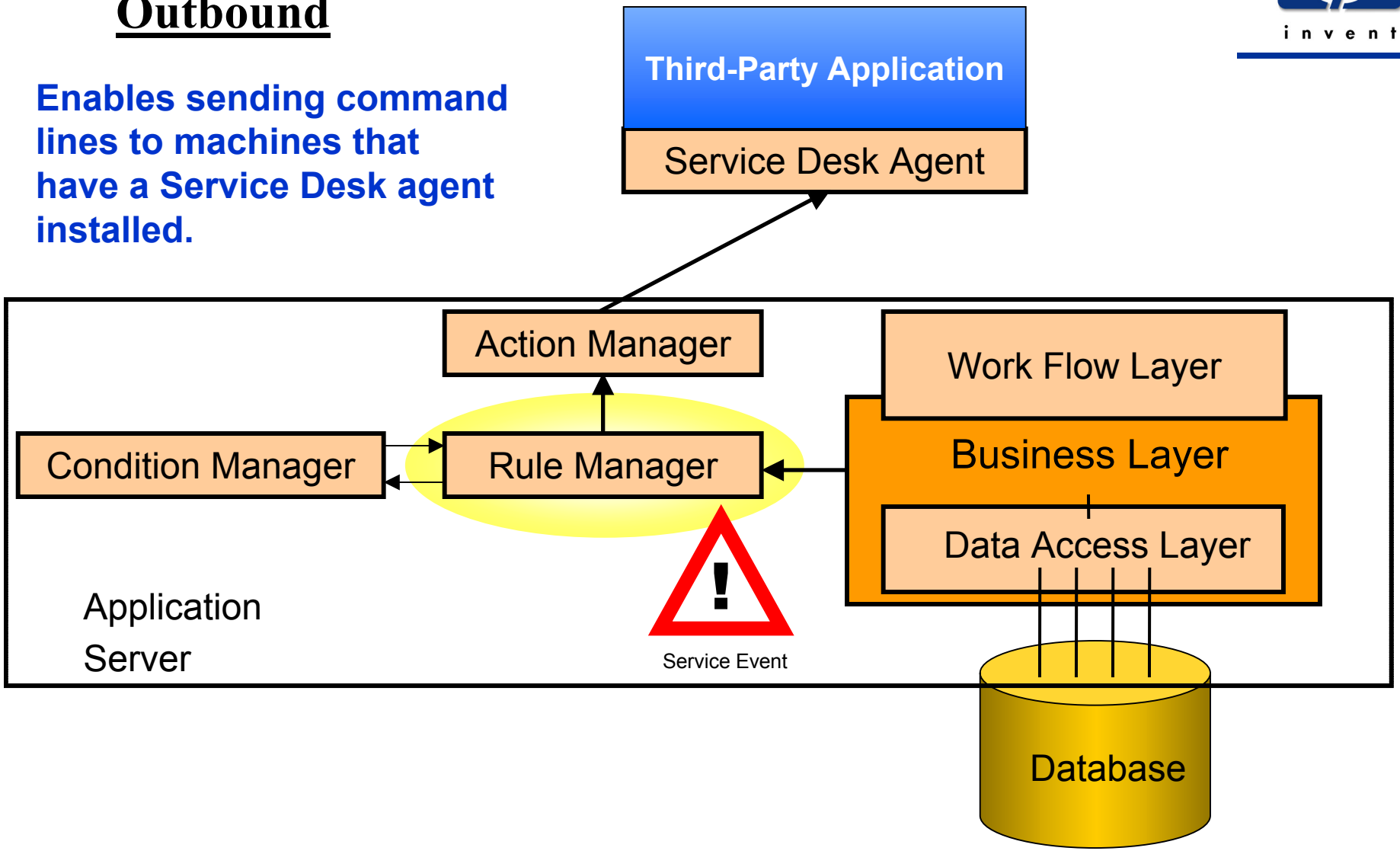
Service Events
Outbound

Enables sending command lines to machines that have a Service Desk agent installed.



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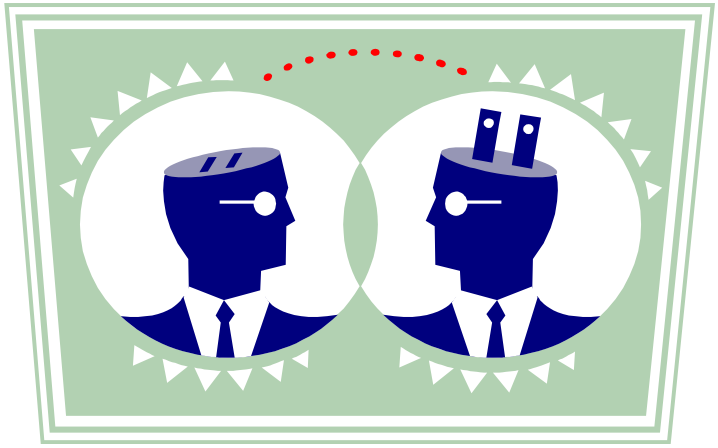
Service Events / Rules
Outbound

- Events can concern any item in Service Desk (incidents, configuration items, persons, etc.)

- Out-of-the-box-events / rules for hp OpenView
  - Operations (HP-UX, Solaris, Windows)
  - Network Node Manager
  - ManageX



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Service Events / Rules
Outbound

Example: OV Operations

Database Rules: Send Acknowledgement To OVO For Win - Incident

Which conditions do you want to check?

- [x] Registration;Created by;Login name starts with VPW
- [x] Status equals Closed

Add... | Modify... | Remove

Rule description:

When incident is modified
where Registration;Created by;Login name starts with VPW
and Status equals Closed
Send acknowledgement to OVO for Win (Command Exec A...

< Back | Next > | Cancel

Command Exec Action

Name: Send acknowledgement to OVO for Win

Description:

When the incident, originating from OVO, is closed, an acknowledgement is sent to OVO

Host

This command will be executed on the following host:

[Registration;Created by;Host]

- [ ] Blocked

Command line: cscript

Parameters

/NoLogo "\"%OV_PATH%\\bin\\tools\\vpw-sd.vbs\"" [Source ID] OV_MessageUpdate_Acknowledge

Insert at cursor position: Field

OK | Cancel

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Settings Editor

- Settings Editor stores information in XML format.
- Started from program group (MS Windows) or command line (all platforms)
- You have a settings Editor for:
  - Server (Server settings editor)
  - Client (Client accounts)
  - Service pages (Change configuration)

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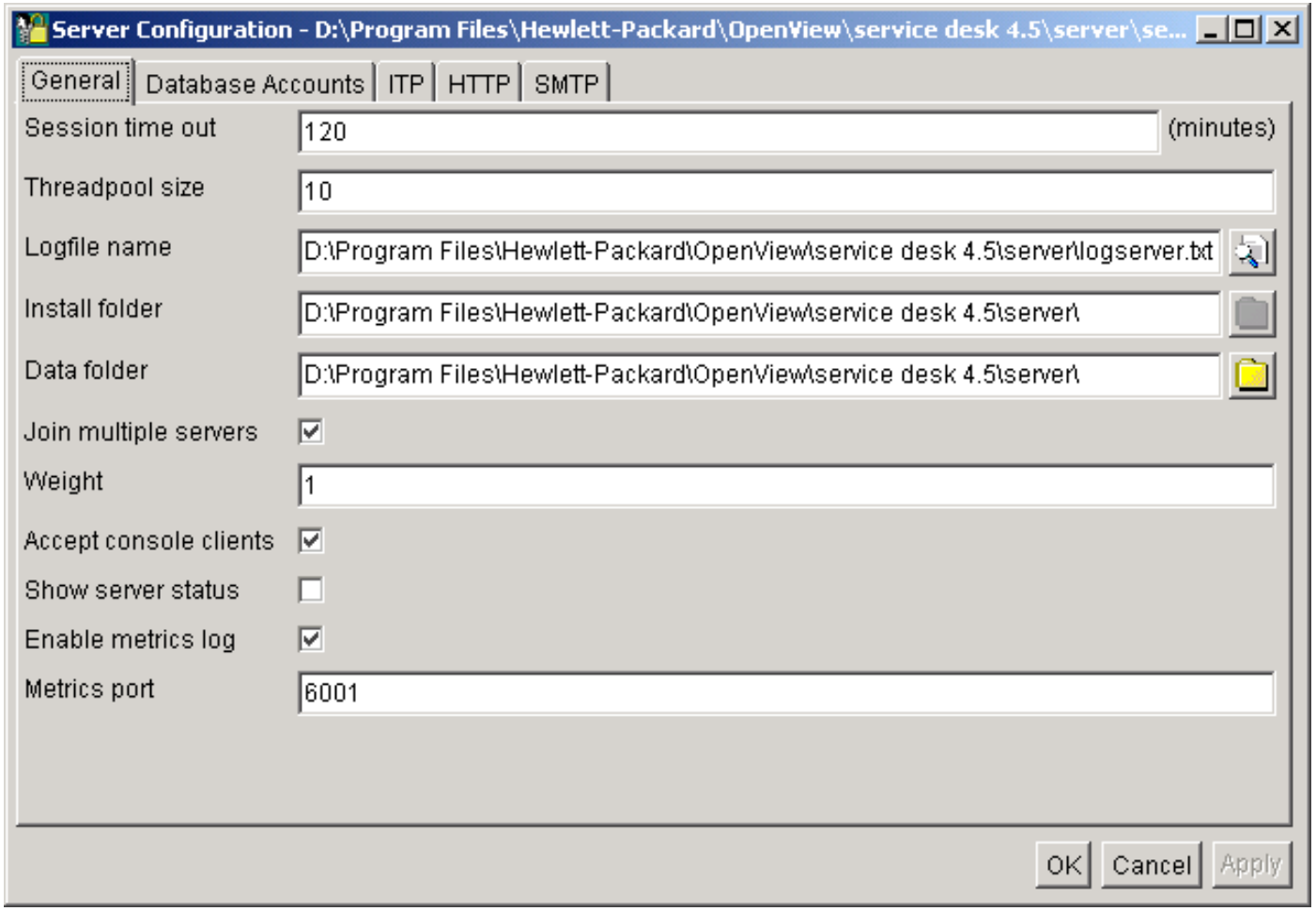
Server Settings Editor / GUI



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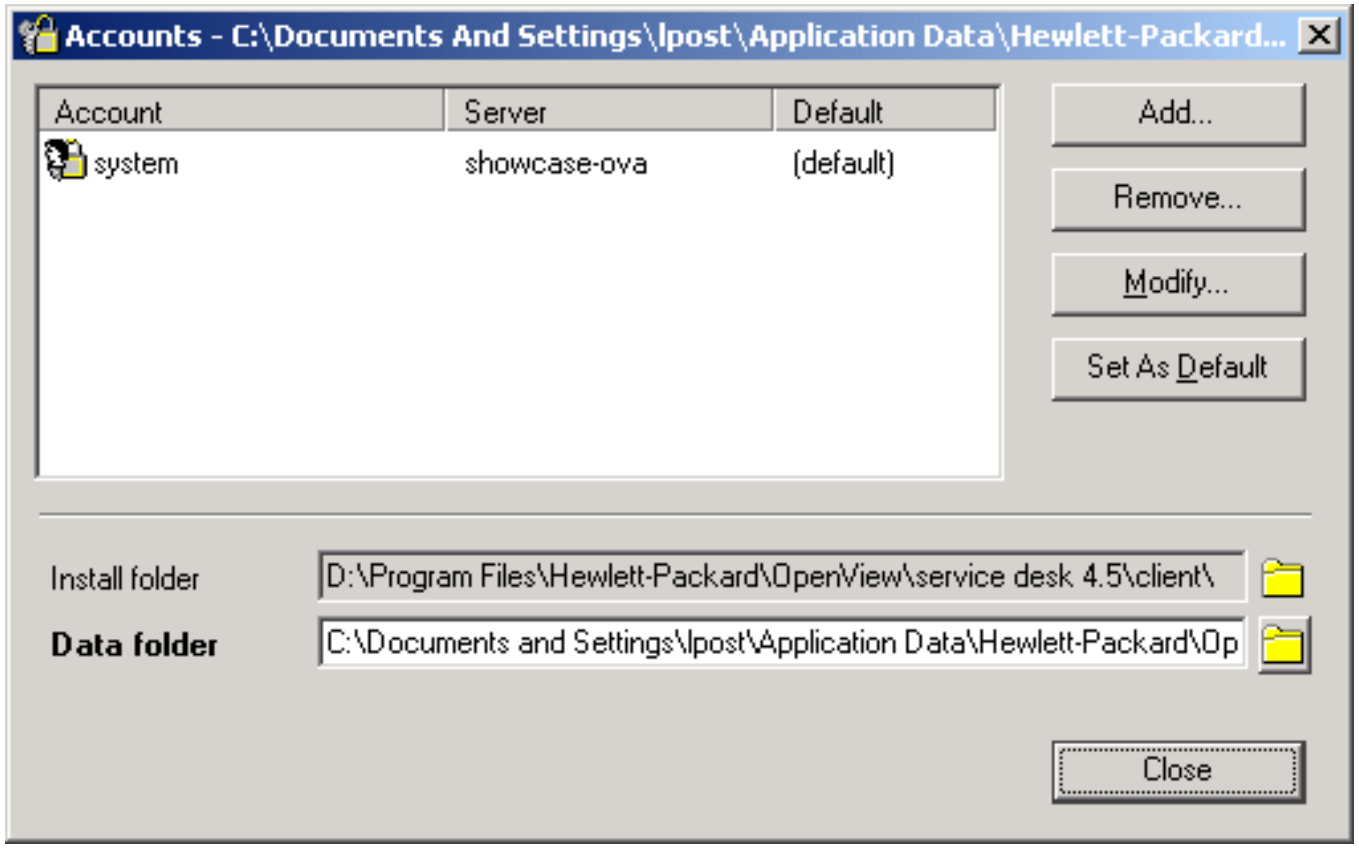
Client Settings Editor / GUI



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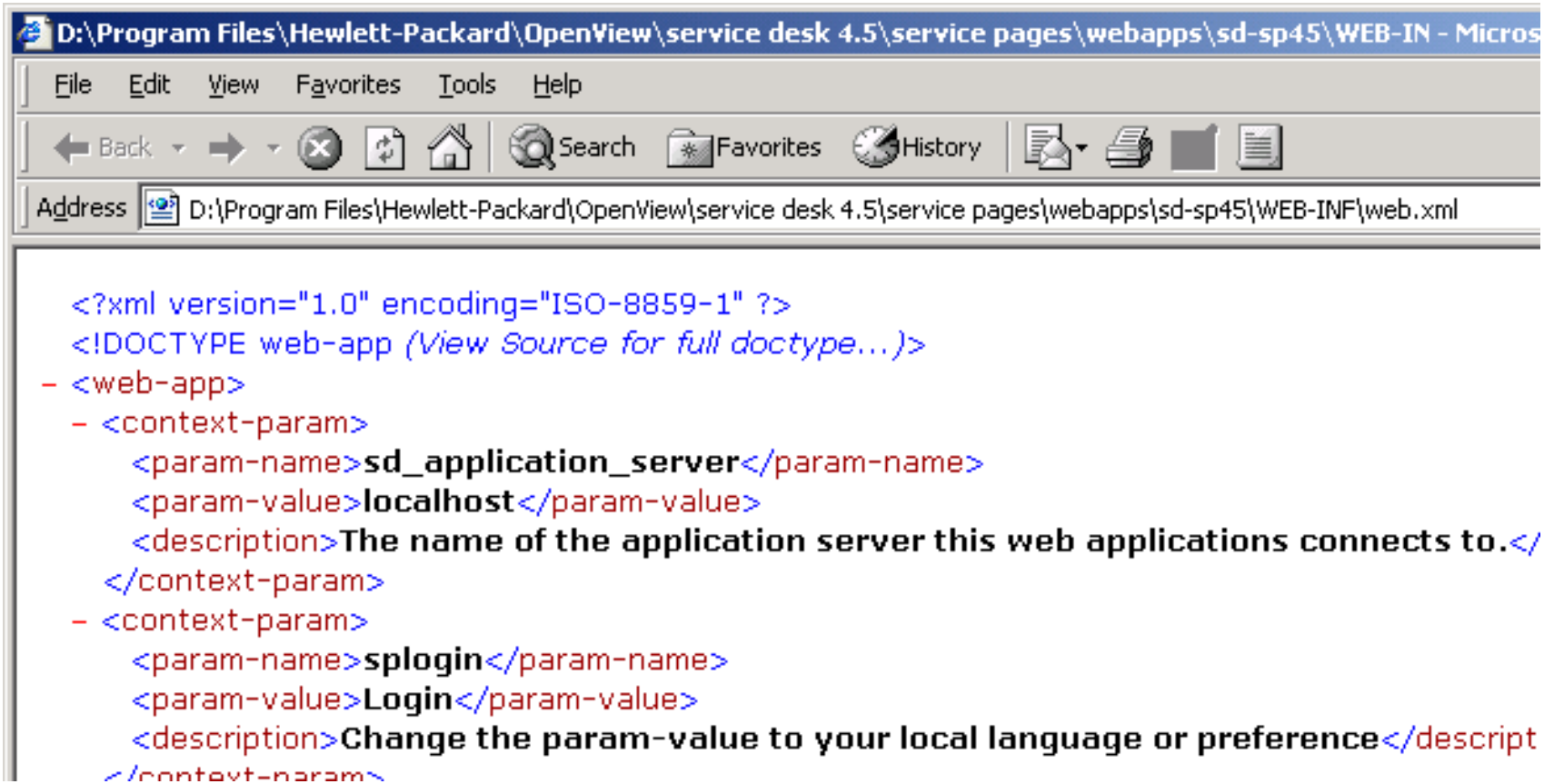
Service Pages Settings Editor



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Application Server Status GUI (1 of 2)

- Status GUI is available for application servers on all platforms: Windows NT4 and 2000, Solaris 8 and HP-UX 11.0

- Contains the following information:
  - logfile
  - database connection
  - performance figures
  - ports and services
  - currently connected clients and application servers

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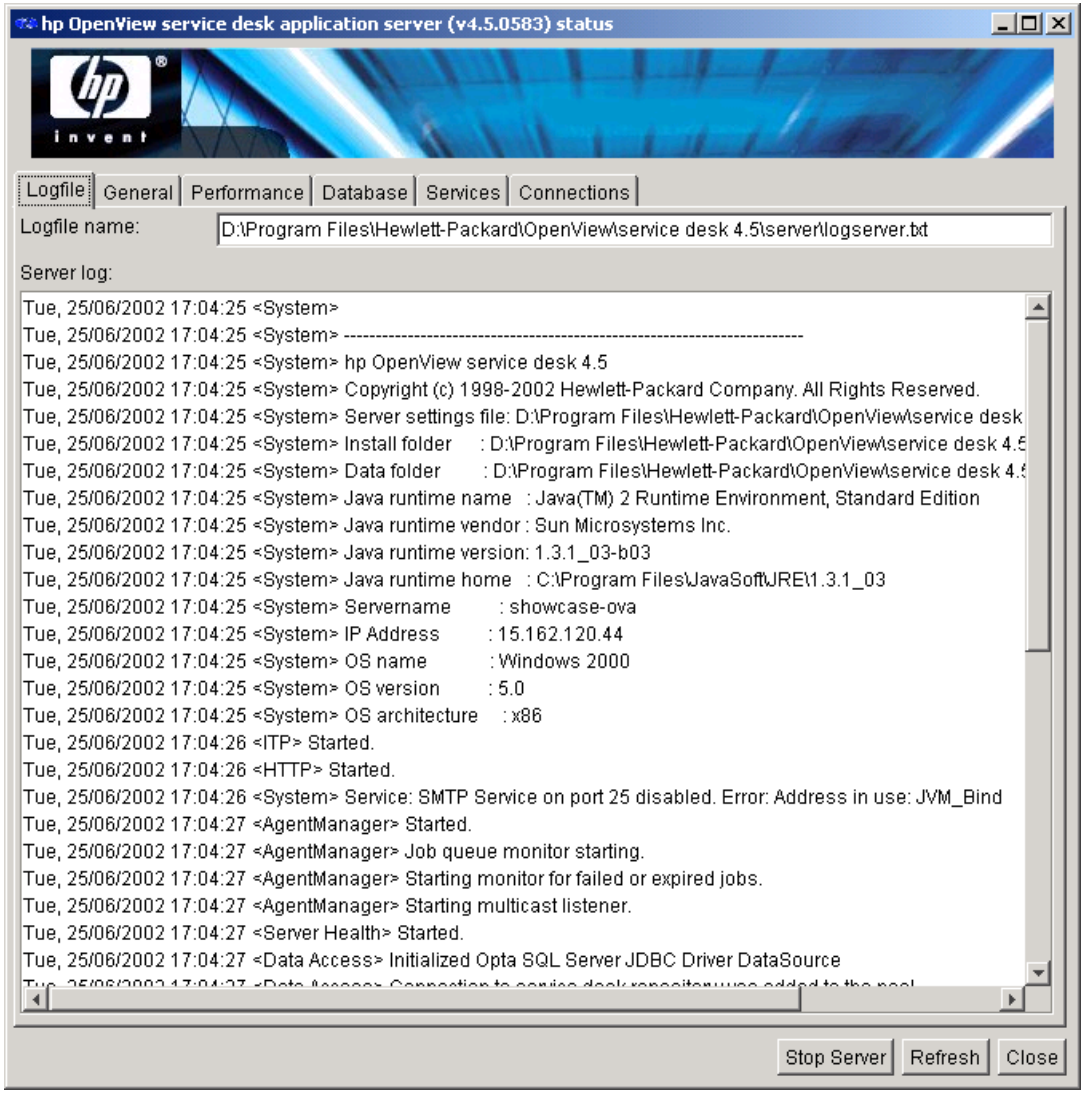
Application Server Status GUI (2 of 2)



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Service Desk Installation

- Basic installation:
  - simple copy of files using native installers
  - configuration afterwards through settings editor

- Options native to MS Windows installer can be used:
  - silent installation
  - fully automatic remote installation
  - especially useful for installation of large numbers of clients

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Installation points of interest

- Installation Menus
- Log Files
- Database connection tab

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Installation menus

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Installation log files

- Log files
  - logserver.txt Application server ..\server\log\
  - logclient.txt Client ..\client\log\
  - logDatabase.txt Database Config. wizard ..\server\log
  - logAgent.txt Agent ..\agent\log\

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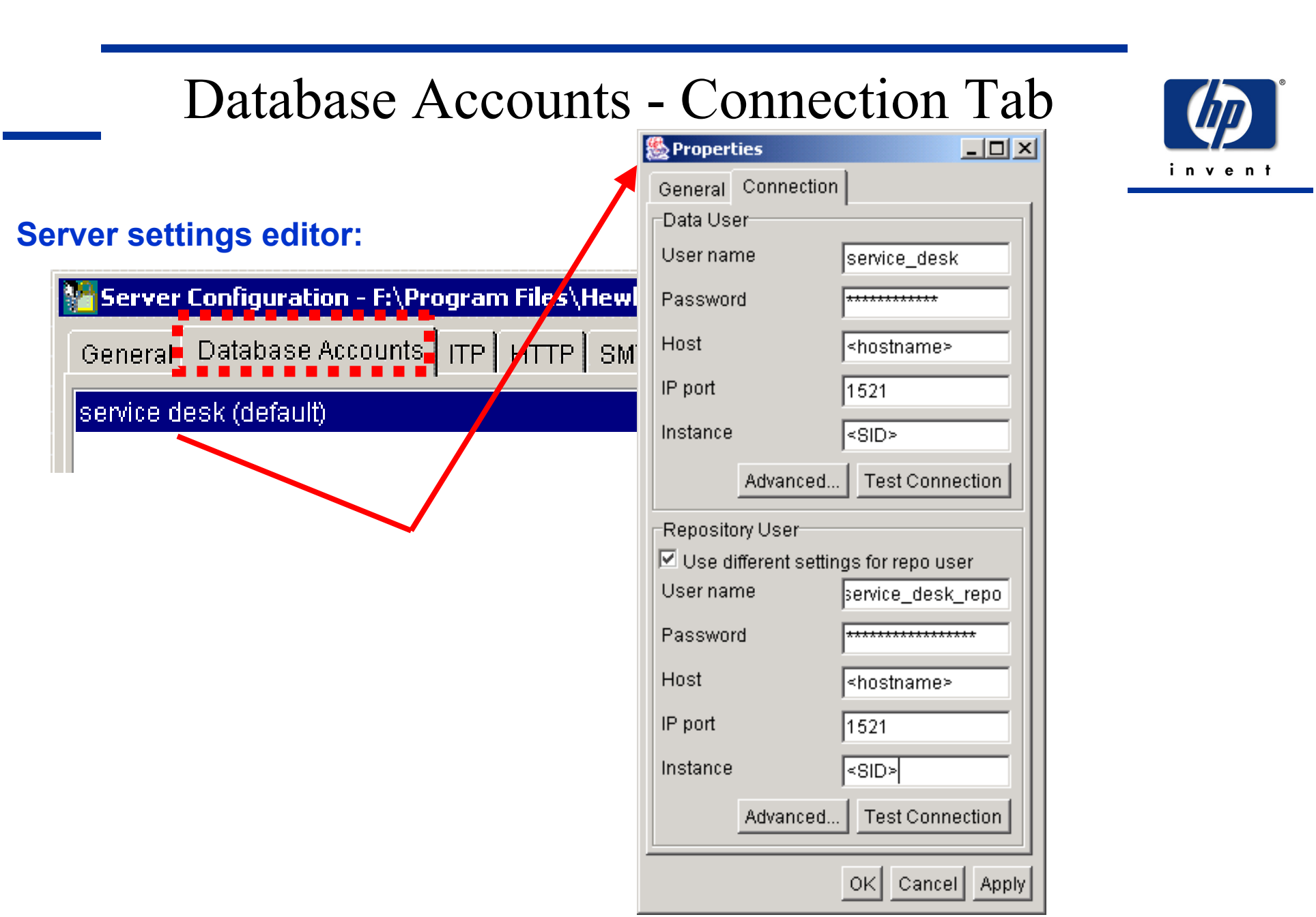
Database Accounts - Connection Tab



Server settings editor:

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Technical Implementation

- **Let's:**
- ❑ **have a break…**
- ❑ **do lab exercises…**

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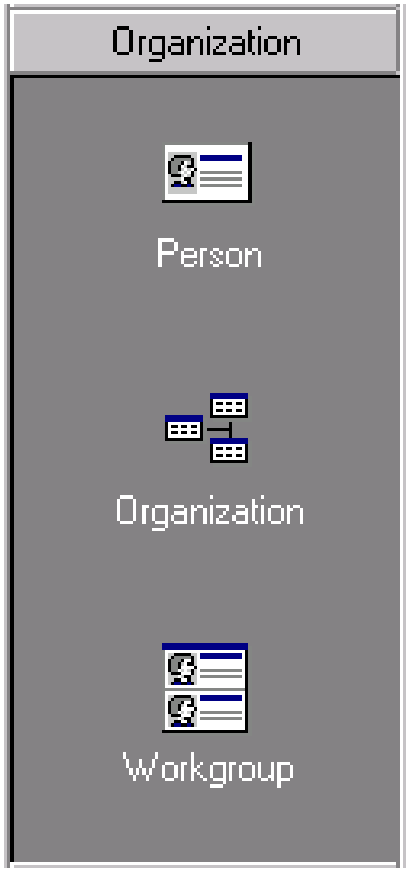
Organization Management



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Organization Management

Objective

- Set up the person and organizational data in an accurate manner, reflecting the hierarchical structure of an organization.

Mission

- Implement the process which is responsible for managing complete and up-to-date information about the IT organization's customers, suppliers and employees.

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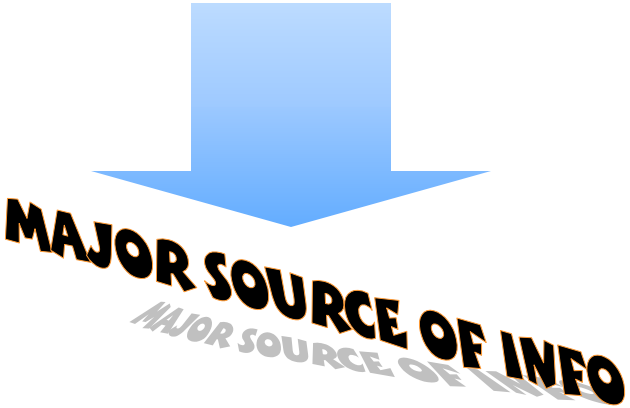
Relationships of Organization Management

- Configuration Management
- Helpdesk (Service Call and Incident) Management
- Problem Management
- Change Management
- Service Level Management



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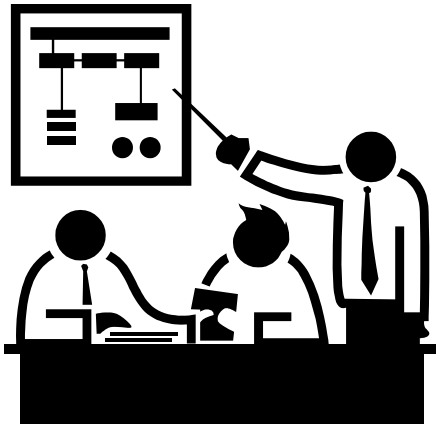
Scope of Organization Management



- It depends on customer requirements.
- All customers and suppliers should be registered.
- It is necessary to register only those who are involved in the services for which the organization is responsible.
- **Required to enable SLM** (Service Level Management)

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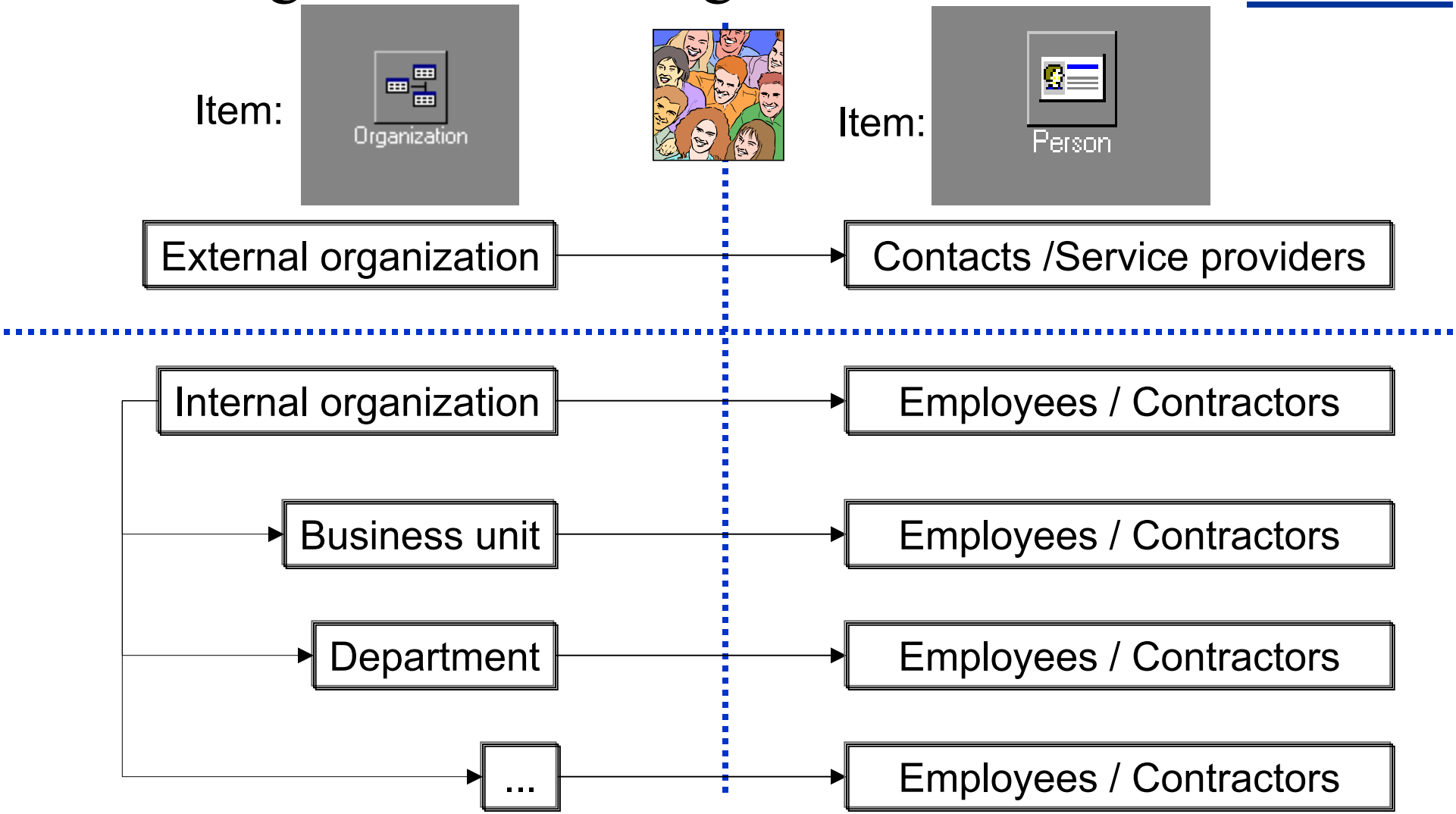
Scope (Continued) of Organization Management



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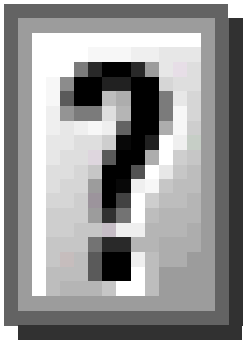
Key Questions: Organization Management

- Which organizational data do you need and why?
- How will organizational data be entered?
- How will organizations be coded?
- What is the naming convention for the search code of persons?
- What categories will be used to distinguish persons?
- . . .



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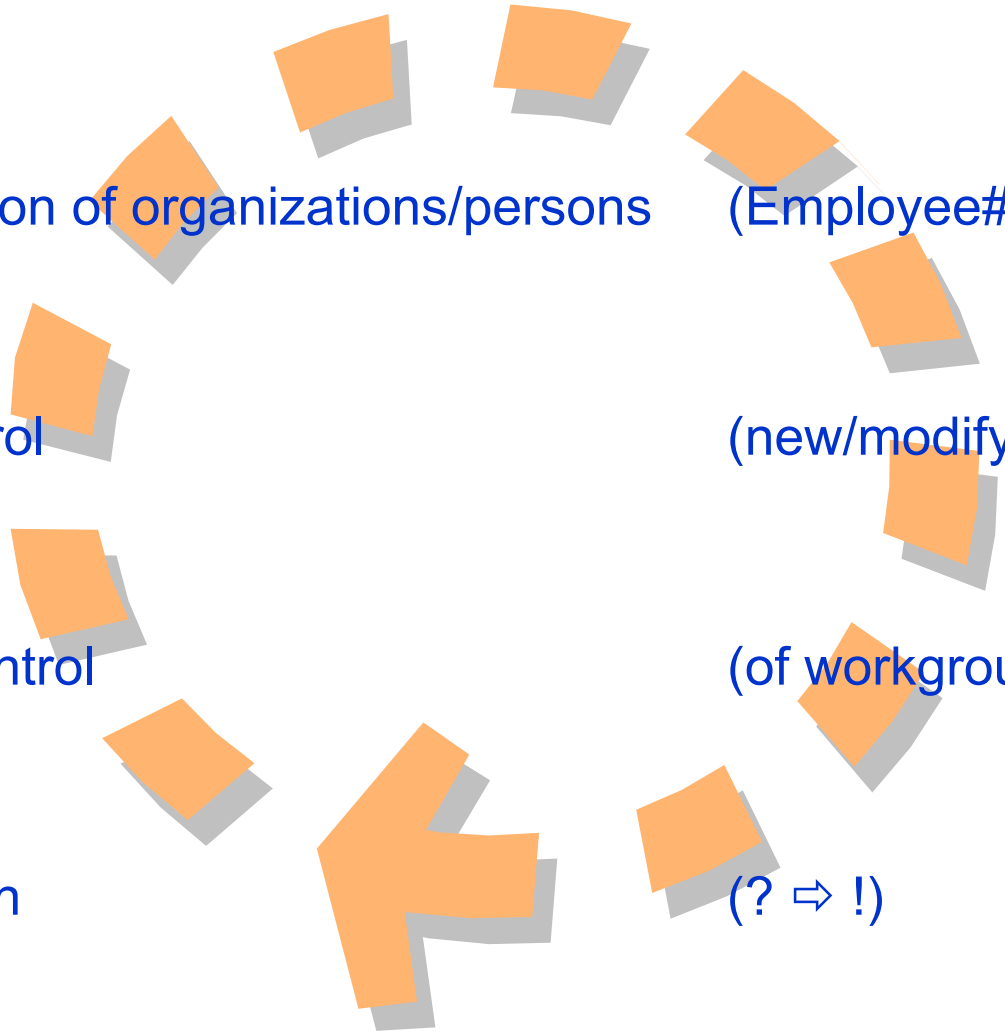
Activities
Organization Management



- Identification of organizations/persons (Employee#/NT account)
- Data control (new/modify/delete)
- Status Control (of workgroup members)
- Verification (? ⇨ !)

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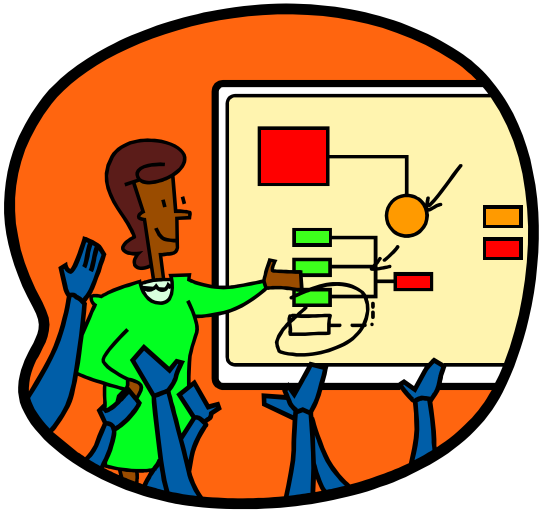
Set Up the Process

Automated

Extracting information from the HR database and/or the billing system database

…and set up the process..

using Service Desk Data Exchange



OR

Manual

…and set up the process...

using forms and templates in the user interface

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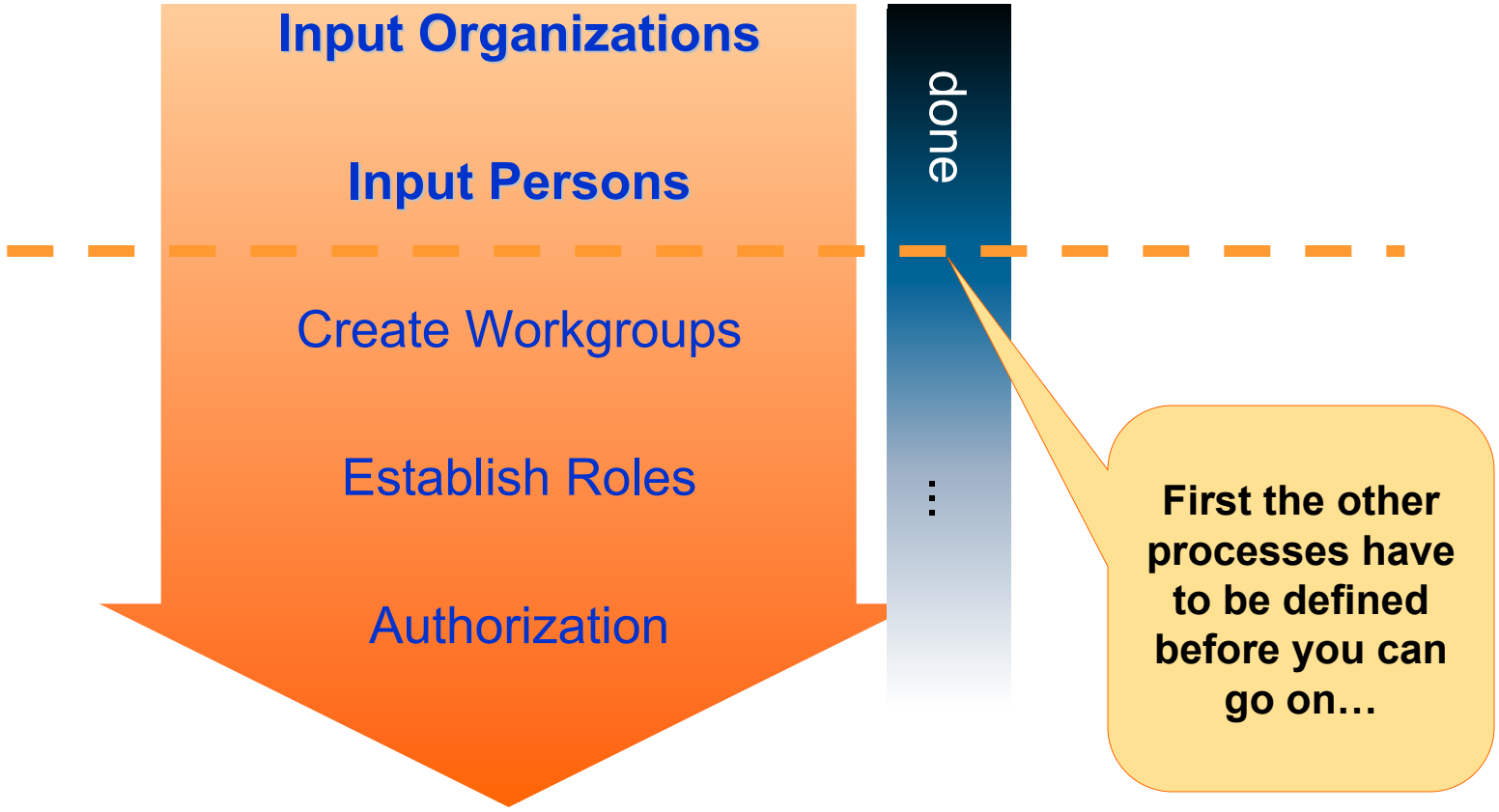
What Can You Do So Far?



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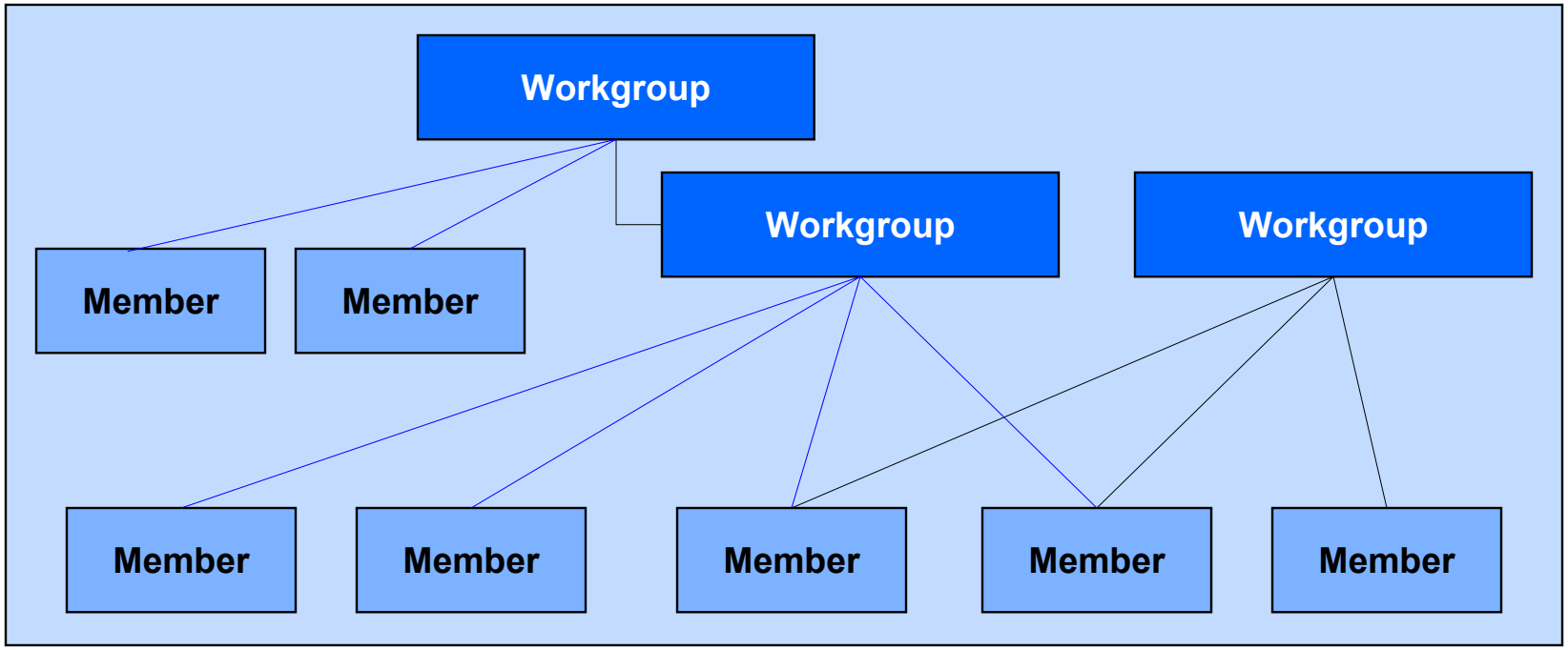
Create Workgroups

- Group specialists in one (or more) functional groups
- Used for assignments (Each workgroup has its own Calendar)
- Workgroups represents the internal Support Chain structure
- Can have hierarchical workgroups
- Member = Service Desk *Person*



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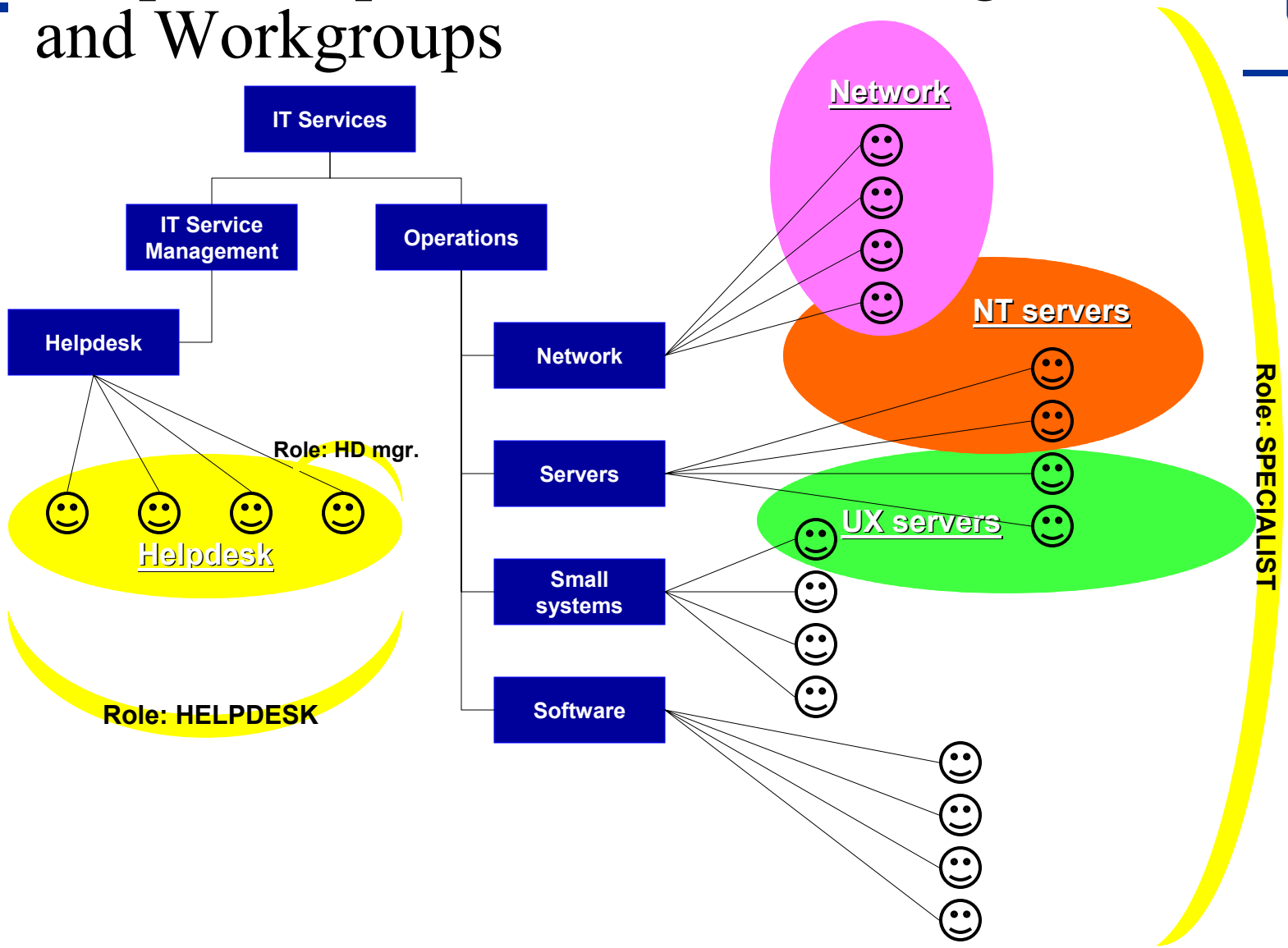
Graphic Representation of the Organization and Workgroups



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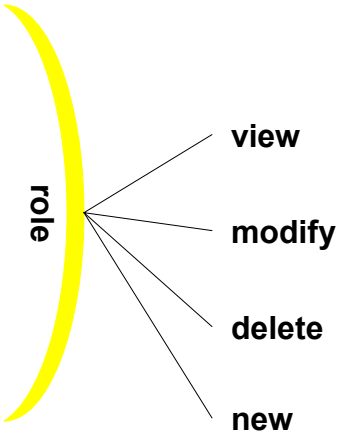
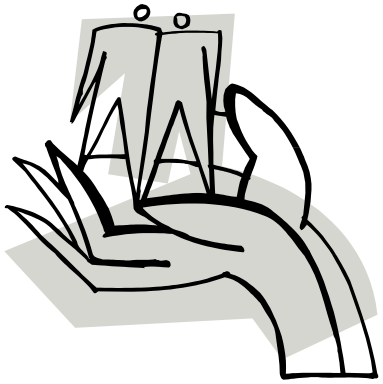
Establish Roles and Authorizations

- Define roles
- Link authorizations to a role
- Give a person one or more roles



Something to be done after processes are defined!

Examples:
- Helpdesk role
- Specialist role
- Helpdesk manager role
- Problem manager role
- ...



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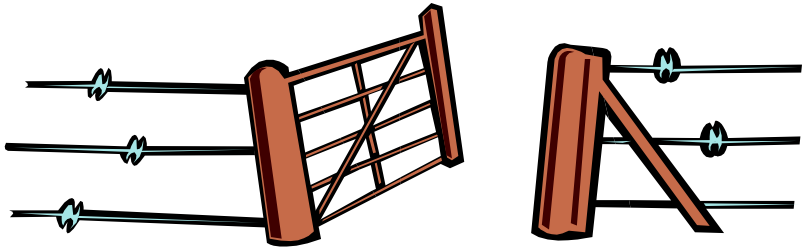
Authorizations



Roles can be authorized on:

- item access (new / modify / view / delete)
- folder access (new / modify / view / delete)
- form access (yes / no)
- view access (yes / no)
- template access (yes / no)
- action access (yes / no)
- field access (yes/no)

Something to be done <u>after</u> processes are defined!

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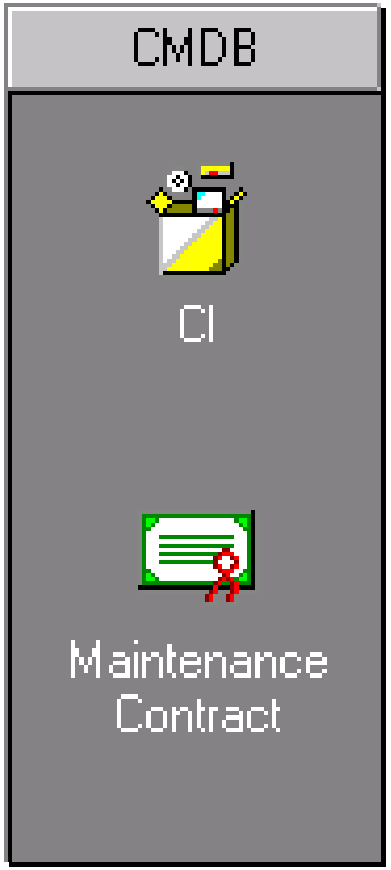
Let's:

- go see the tool…
- do some exercises…
- have a break…

Configuration Management



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Objectives

- Understand the following terms: CMDB, CI, components, relations (parent, child and unique/type)
- Design a hierarchical CI (Configuration Item) overview, based on organizational information
- Design/update the CMDB to reflect this structure

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Mission

"To implement the process that is responsible for recording and managing complete and up-to-date information about all relevant configuration items and the relations between them."

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Configuration Management defined

- Combination of Asset Management and “typical” Configuration Management
- Includes both entities and relationships
- Focuses on controlling and managing IT assets
- Links with all other processes

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Relationships

- Organization Management
- Helpdesk Management
- Problem Management
- Change Management
- Service Level Management

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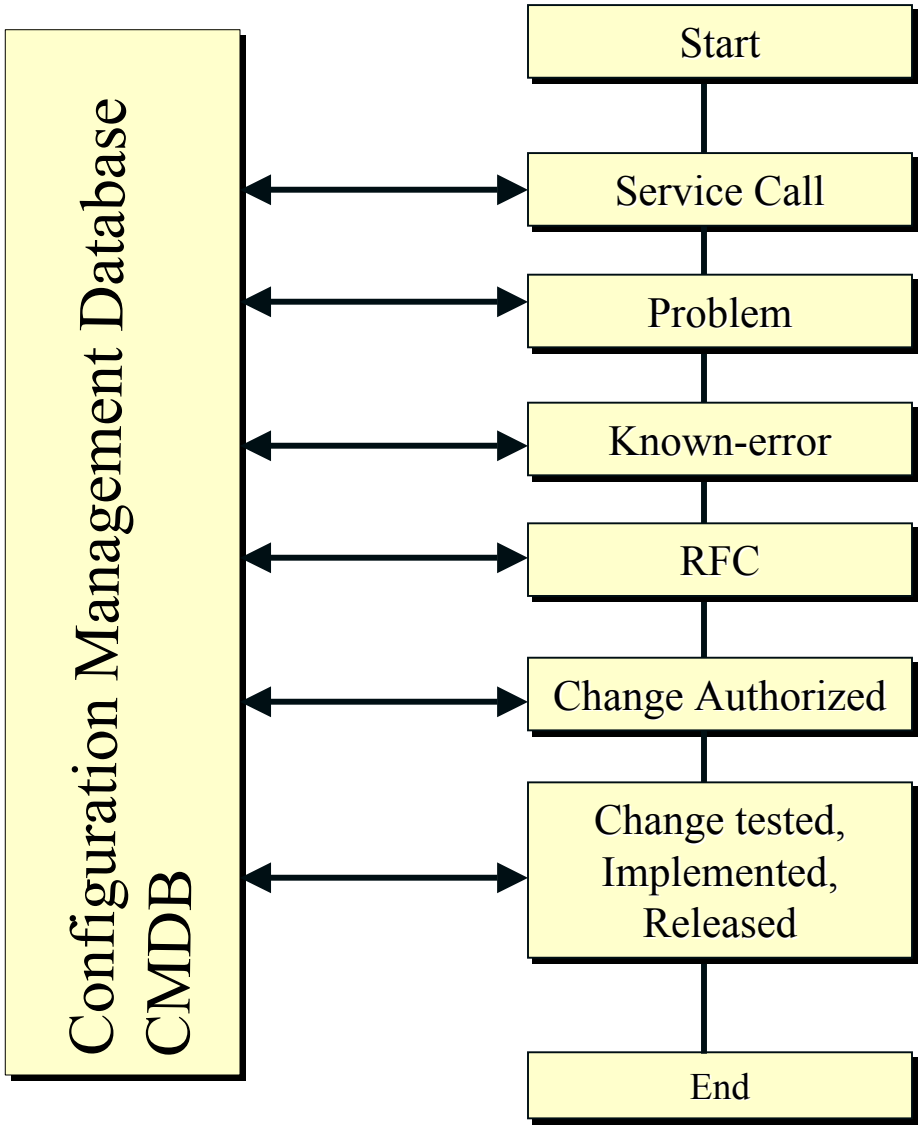
Process Support



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Config Management in Service Desk

- Records CI centric information
- Tracks users of each CI
- Maps CIs to Services
- Links:
  - Parent CIs
  - Child CIs
  - Related CIs
- Shows all Service Calls & Work Orders opened on each CI
- Records financial data for each CI
- Enables other modules to use CI data

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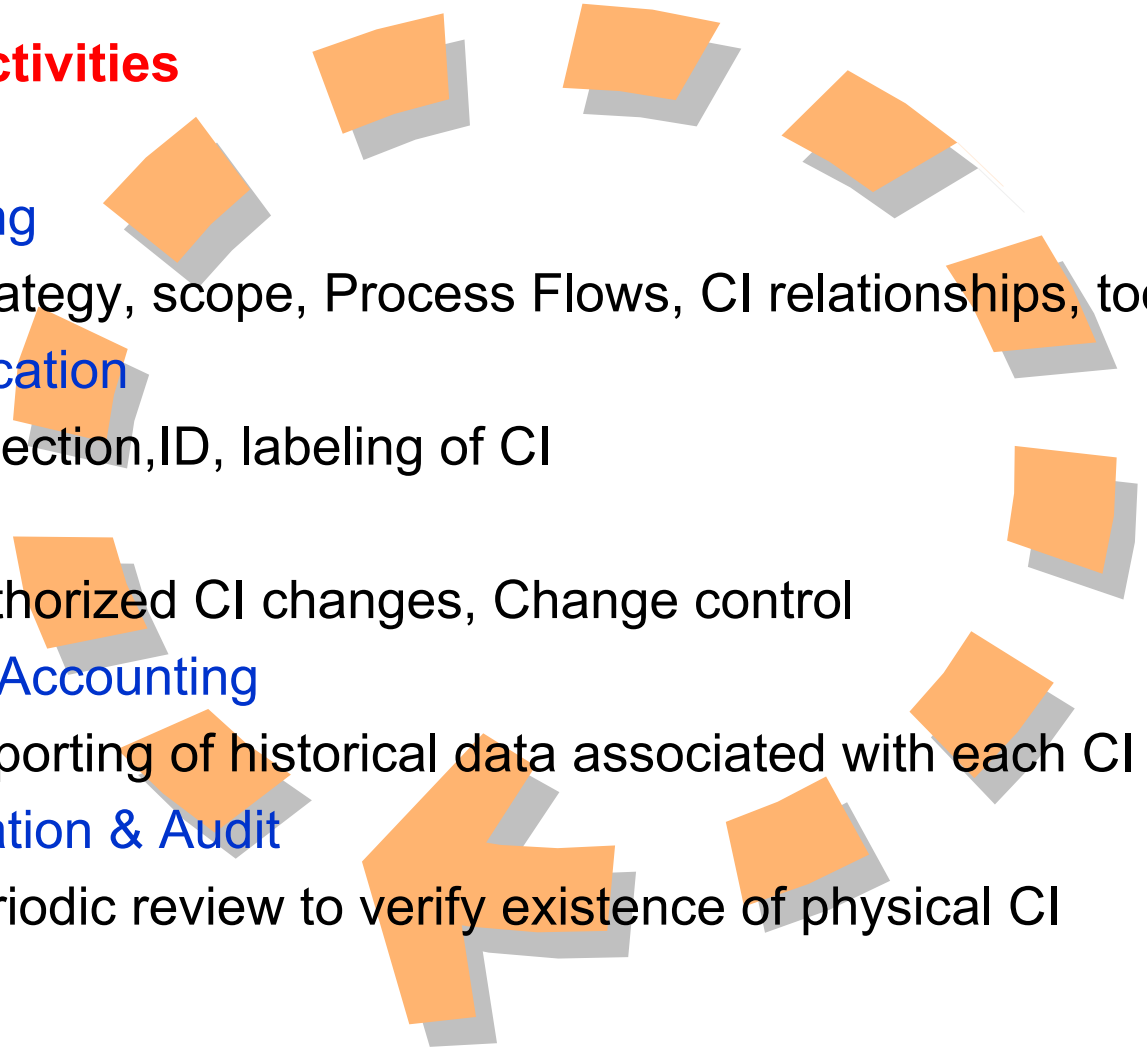
Configuration Management Process



5 Key Activities

- Planning
  - Strategy, scope, Process Flows, CI relationships, tools
- Identification
  - Selection,ID, labeling of CI
- Control
  - Authorized CI changes, Change control
- Status Accounting
  - Reporting of historical data associated with each CI
- Verification & Audit
  - Periodic review to verify existence of physical CI

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Design Phase – Or Think Things Through…

- Define CI groups (scope)
- Define Components
- Define Attributes (details)
- Define Unique/Type
- Define Relations
- Make Entity Relationship Diagram (ERD)

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Possible CI types

- Configuration Items
  - Operating Software
  - Application Software
  - Documentation
  - Network Components
  - Desktop & Server Components
  - Other Hardware
  - Cabling
- Logical and Physical CIs
  - Supports SLM development in Service Desk!!

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CI Relations

- Parent-Child
- Is Connected To
- Resides on
- Makes use of
- Is a copy of
- Is a type of

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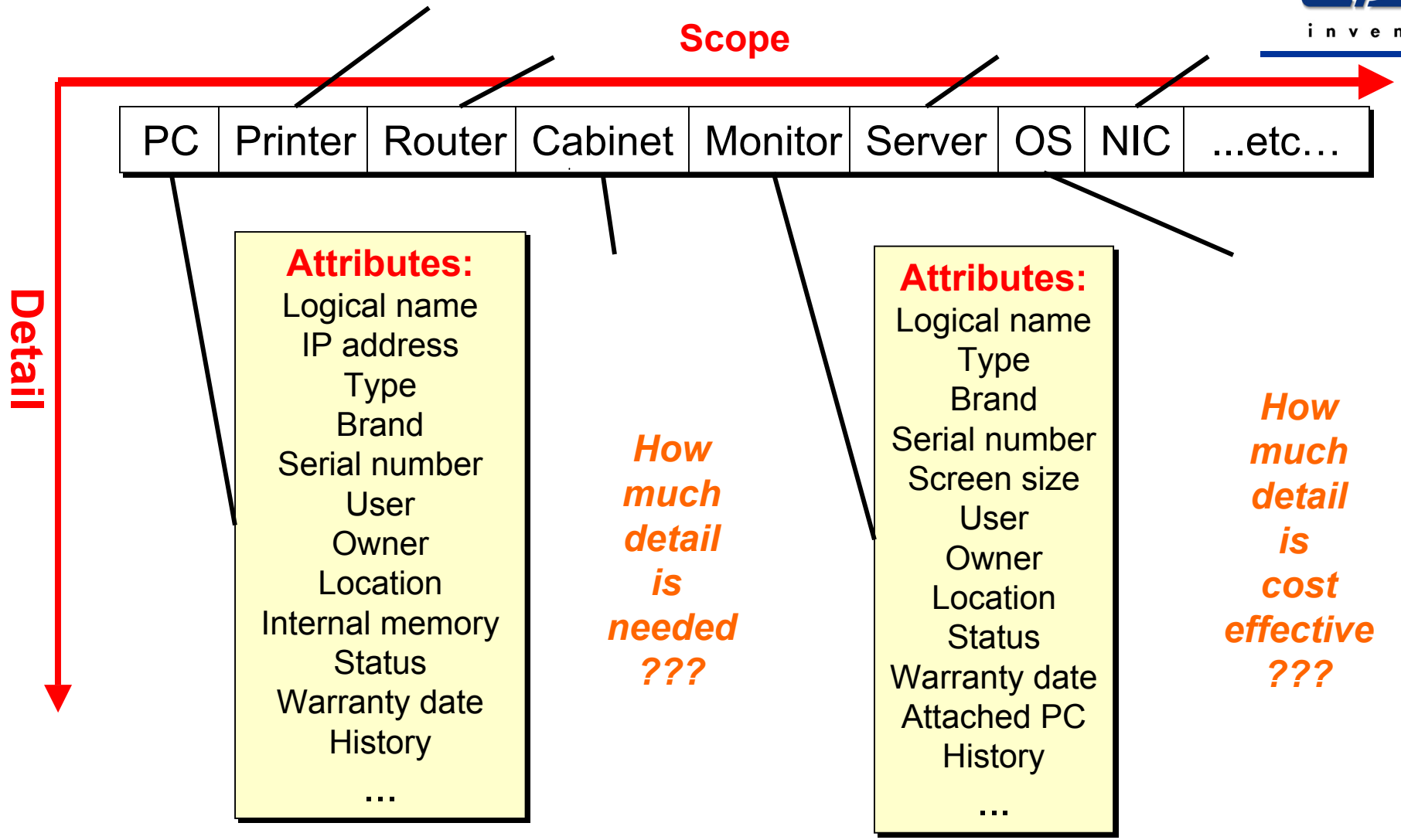
Define CI Groups and Attributes



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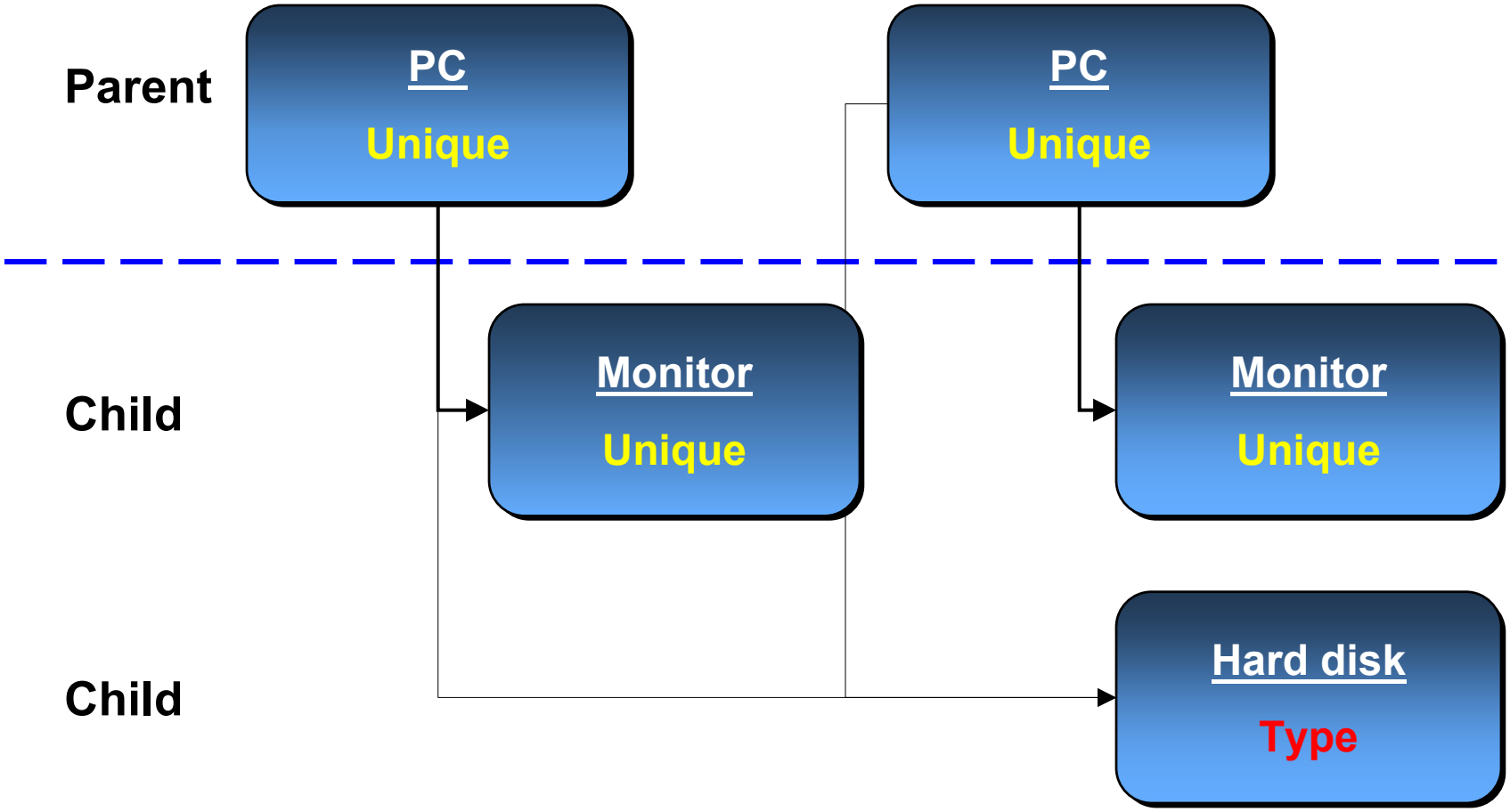
Define (Non-)Unique Components



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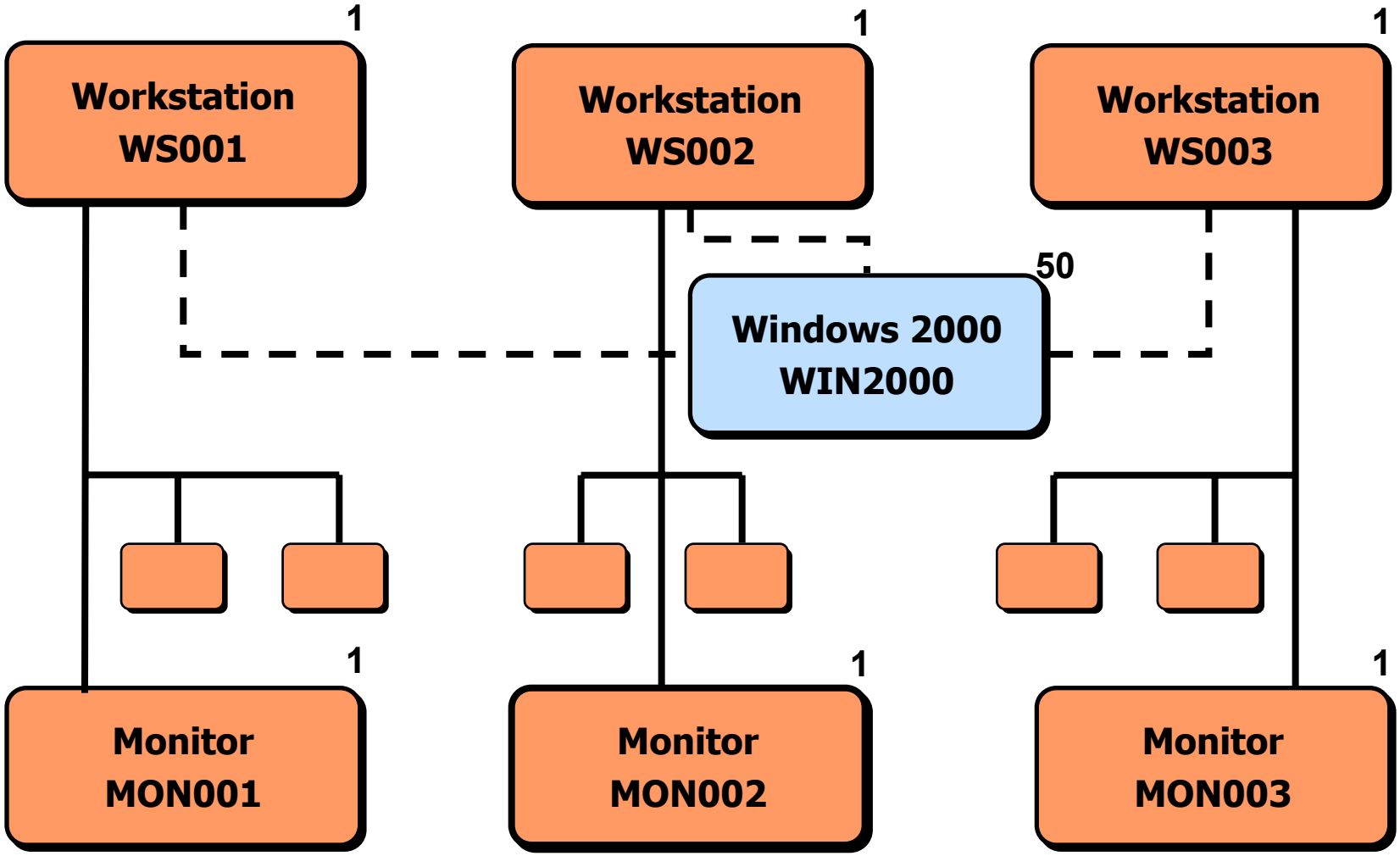
Difference between Non- and Unique CIs



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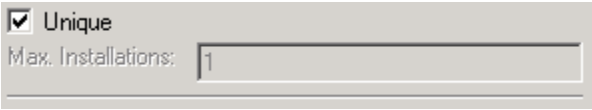
(Non-) Unique CIs in Service Desk

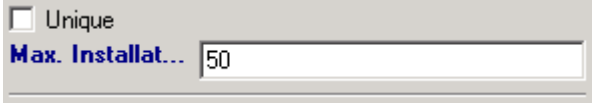
Unique CI

- One physical item that can be tracked individually and, therefore, has a location, serial number, user. (e.g. PC)



Type CI / Non-unique CI

- Represents a group of (physical) items and cannot be tracked individually. (e.g. OS, keyboard)



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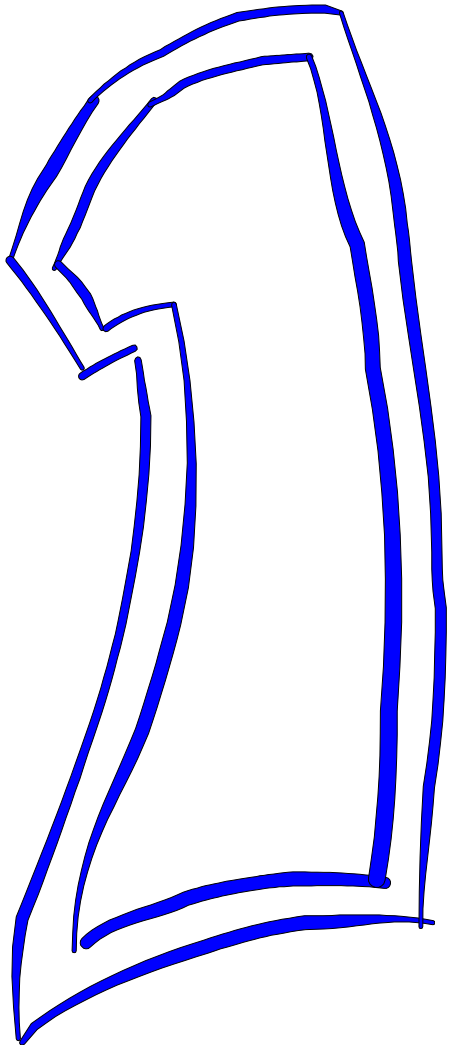
When Should a CI Be Unique?



- **Charges**: You are charging your customer by individual item
- **Ownership**: Ownership of the individual item requires specific characteristics, such as security clearance or job position
- **Standardization**: Changes or settings are not always applied to the whole group of the same kind of configuration items
- **Supplier**: Requires individual registration of serial numbers etc., for maintenance purposes or licensing
- **Control**: The level of control requires individual tracking of the configuration item

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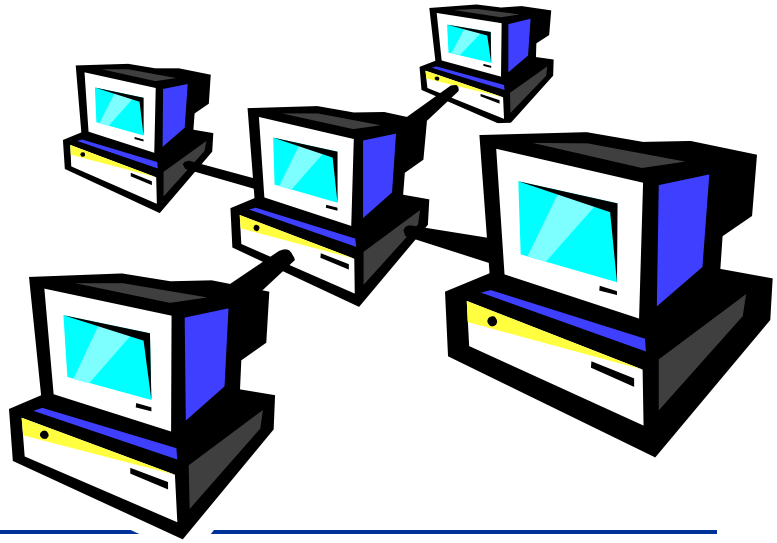
Entity Relation Diagrams (ERD)

There are two graphical representations used:

1. Graphical representation of the *infrastructural relations*

2. Graphical representation of the *parent-child relations* and the components attributes



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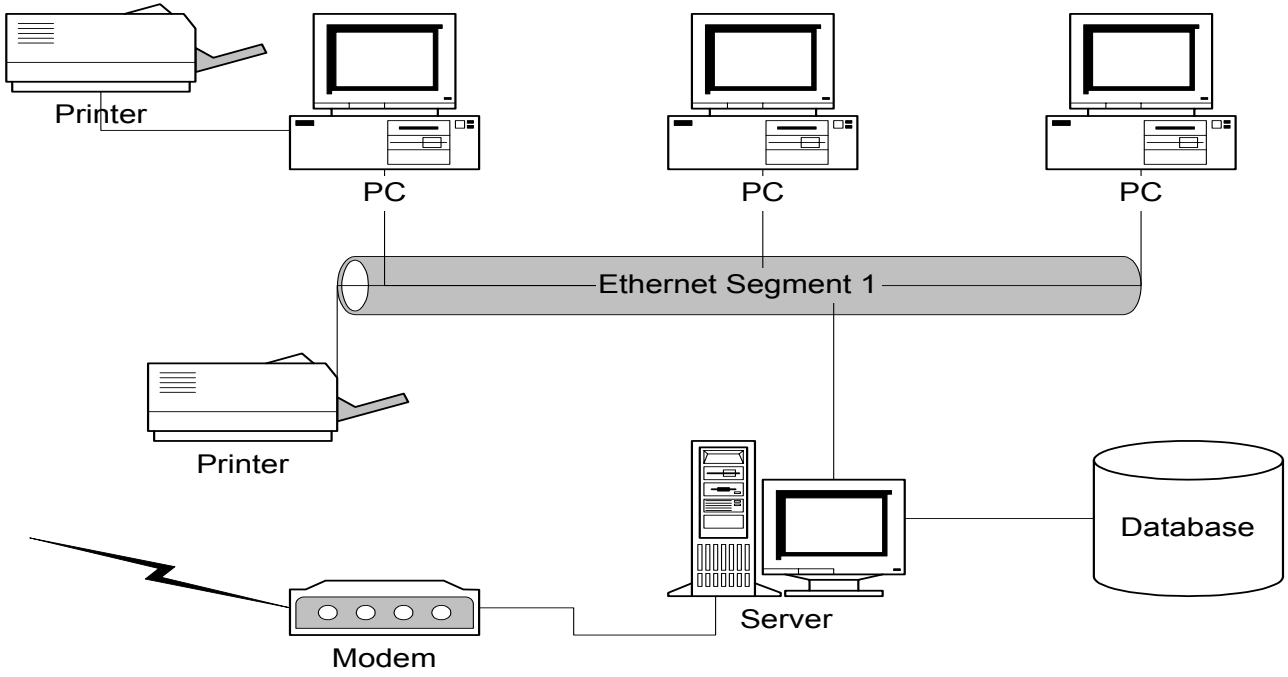
ERD Infrastructure Relations



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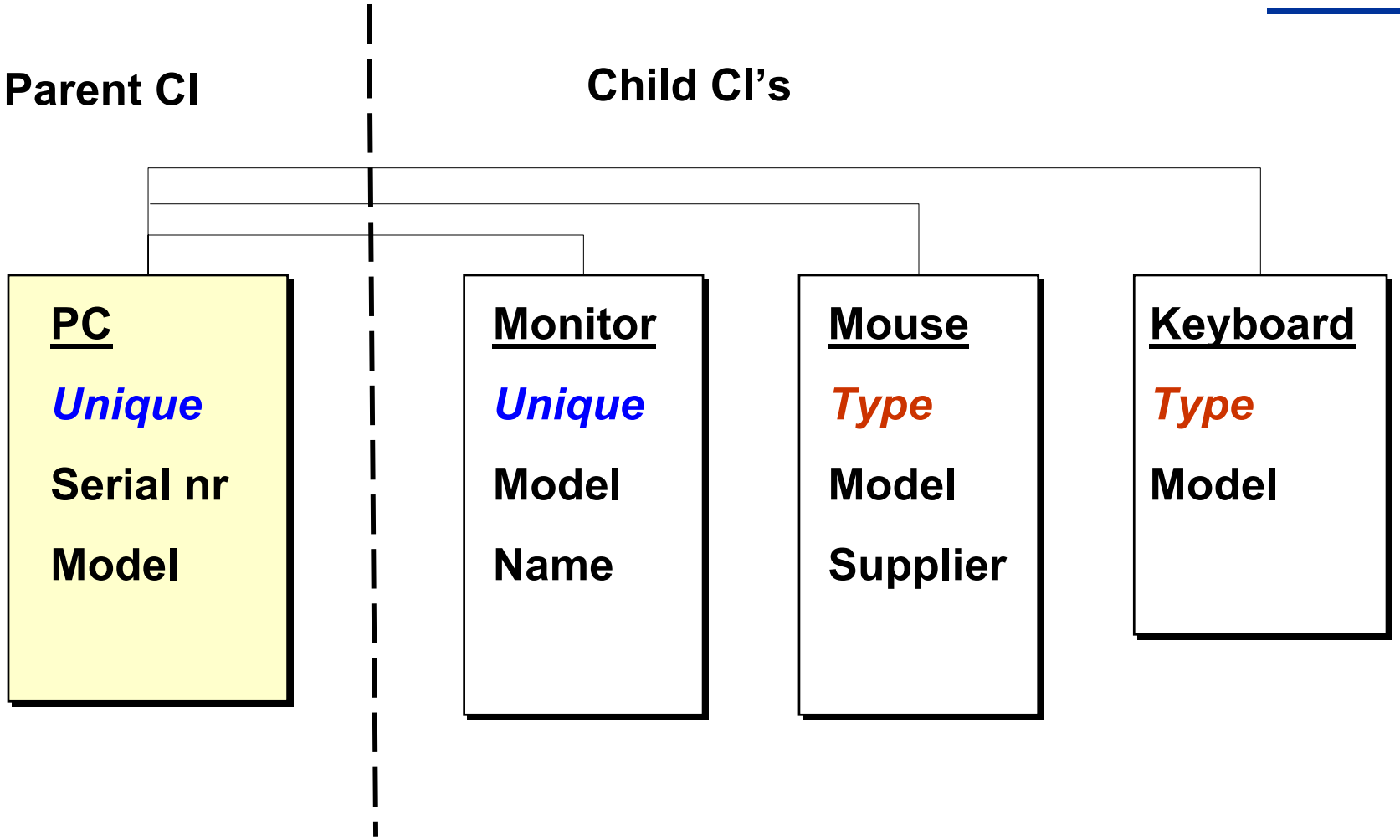
ERD Parent/Child + Attributes



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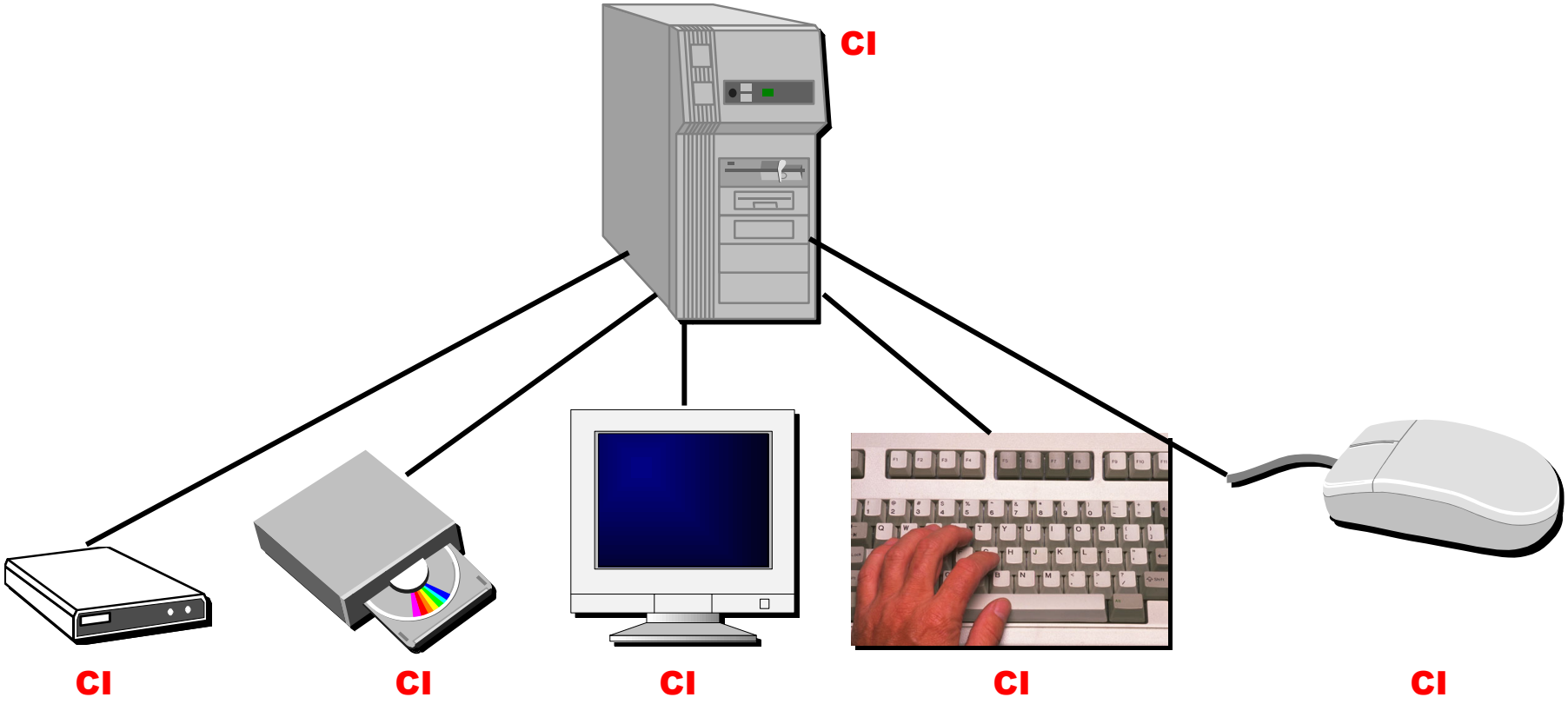
Parent/Child Relation – Components (1 of 2)



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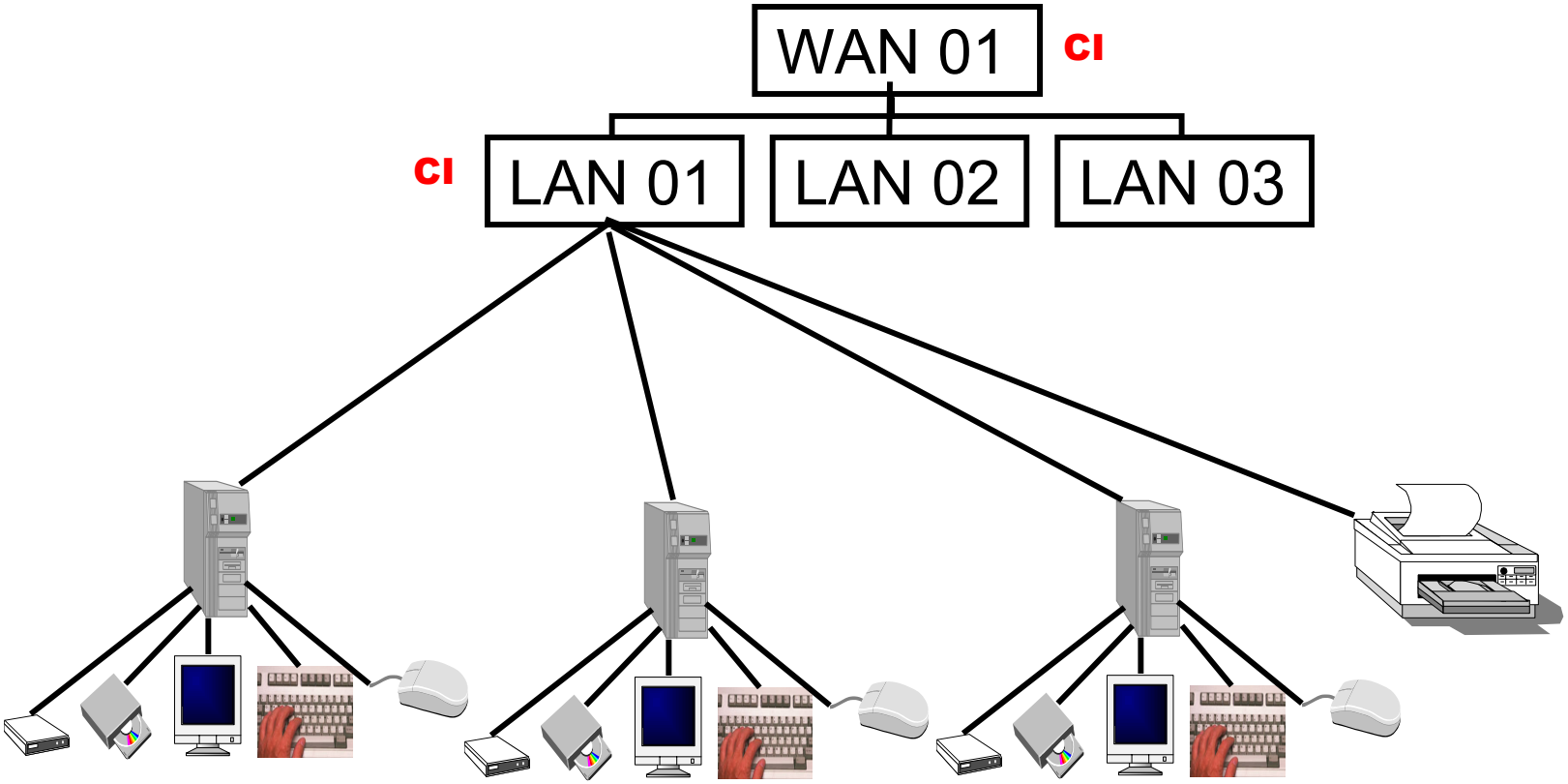
Parent/Child Relation – Components (2 of 2)



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Standard Attributes

Attributes

- Admin. Org.
- Admin. Person
- Admin. Workgroup
- All Incidents (Set)
- Blocked
- Brand
- Category
- Change (Set)
- Child Configuration Items (Set)
- CI Date 4
- CI Number 1
- CI Number 2
- CI Number 4
- CI Shorttext 5
- History (Set)
- IP Address
- Location
- Maintenance Contract
- Max. Installations
- Name 1
- Name 2
- Order Number
- Outsourced To
- Owner Org.
- Owner Per.
- Parent CIs (Set)
- Pool
- Price
- Problems (Set)
- Purchase Date
- Registration
- Related CIs (Set)
- Remark
- Search Code
- --------SEPARATOR--------
- Serial Number
- Service Calls (Set)
- Service Level
- Services (Set)
- Source ID
- Status
- Supplier
- Unique
- Users (Set)
- Warranty Date
- Work Order (Set)

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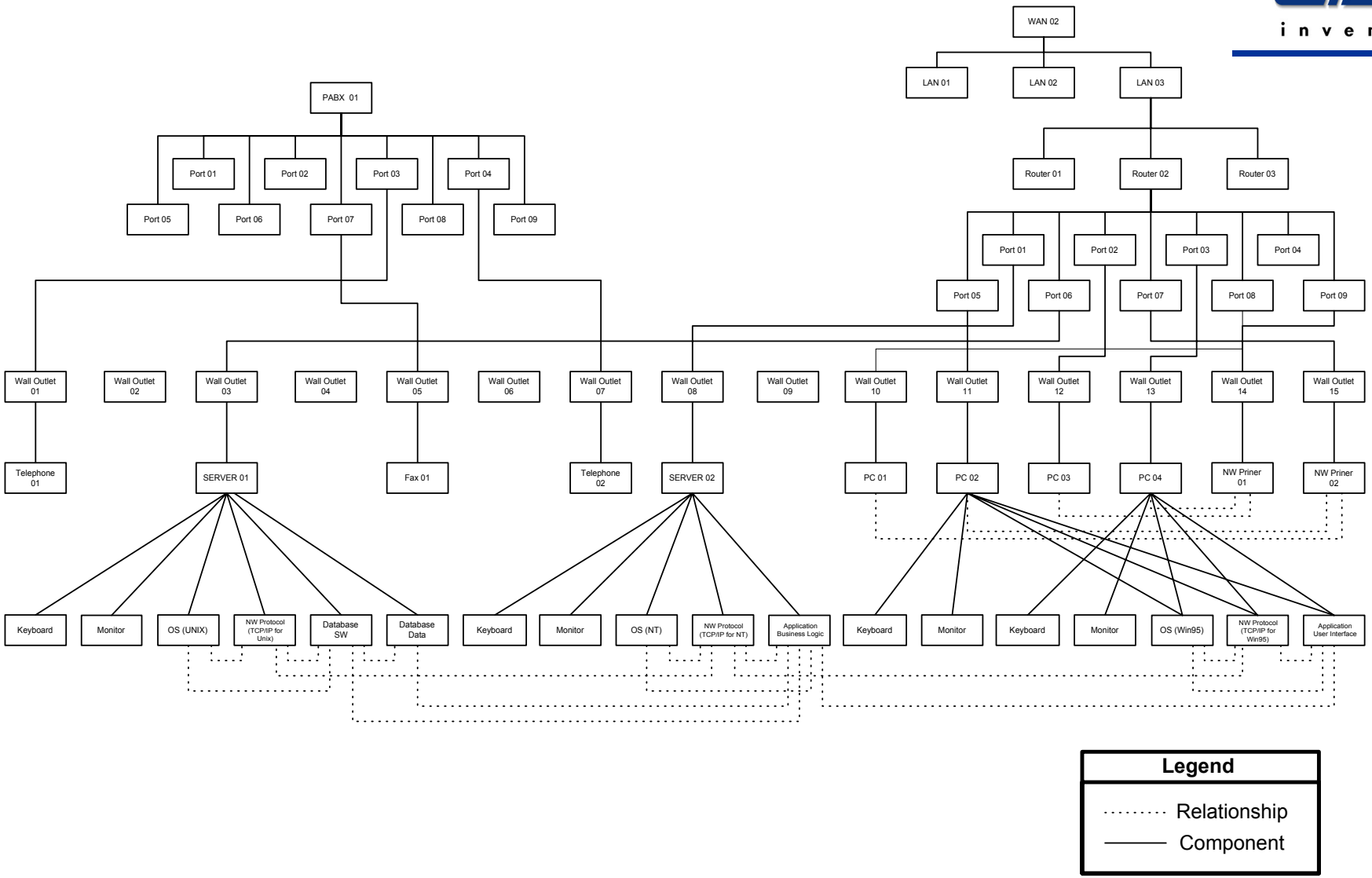
Blue Print of a CMDB



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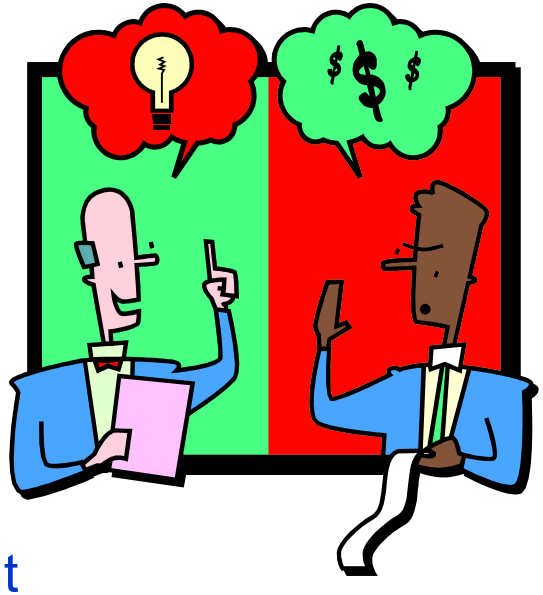
ERD Benefits



- Standardized methodology
- Reduces faults
- Easy to communicate
- Base for taking stock in the real environment
- Base for data exchange decisions and documents
- Base for work instructions

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Design Phase Step 2 – Or Think On…

- Define category structure
- Map ERD to Service Desk
- Decide naming conventions (search codes)
- Determine code tables and forms
- Plan authorizations

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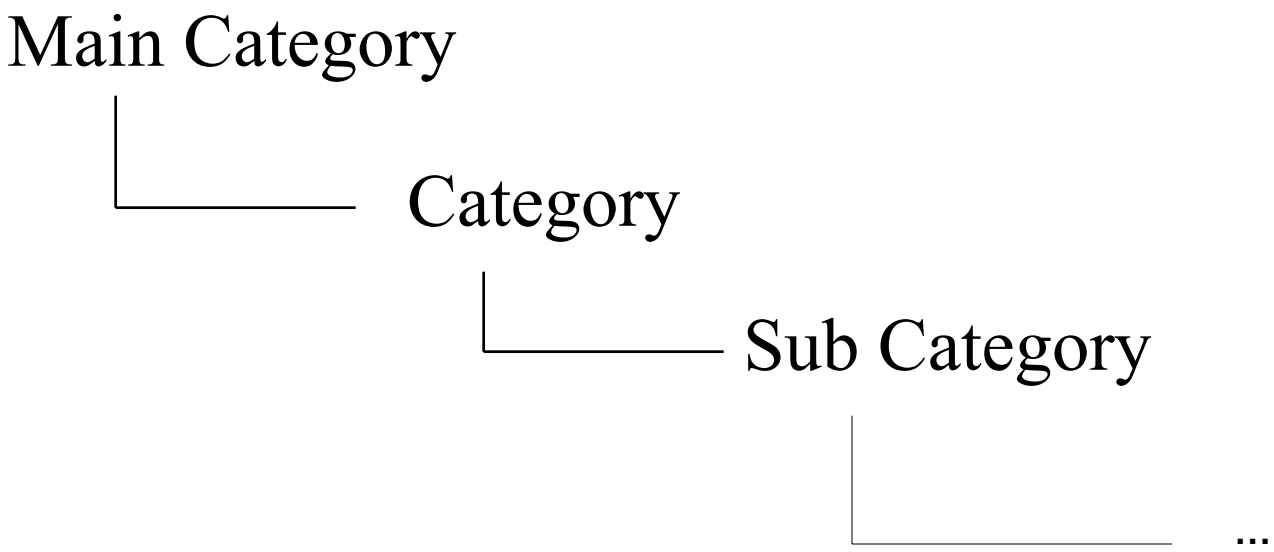
Classification Structure



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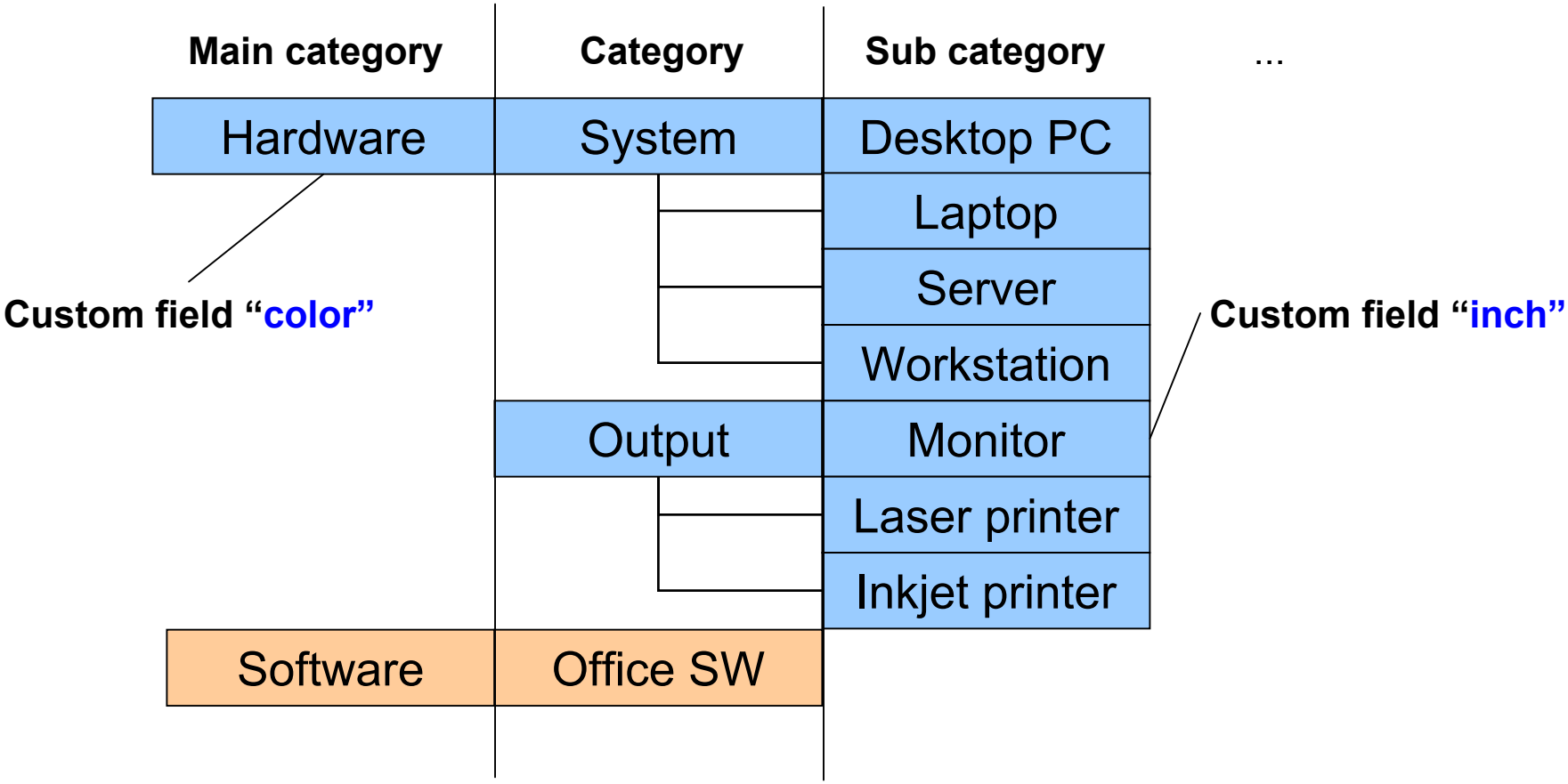
Classification Structure Example



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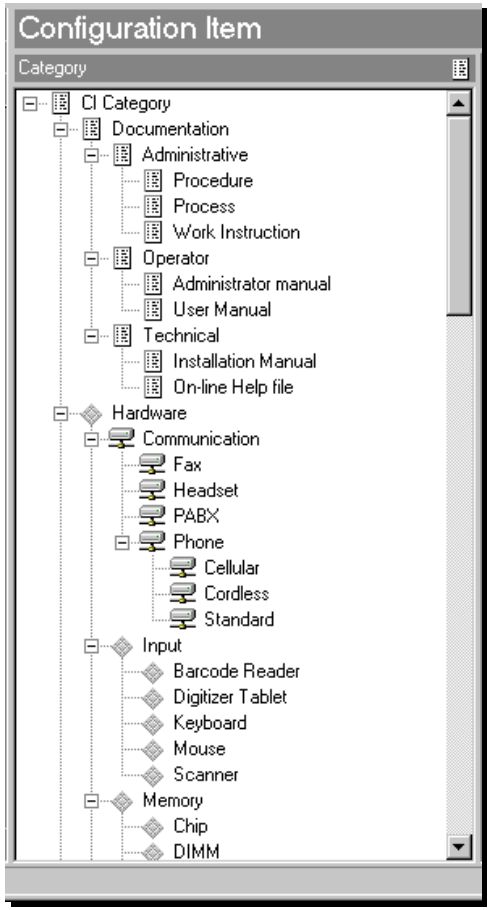
Why a Classification Structure?

Why would you need one?

- Fixed characteristics
- Viewing/reporting
- Searching
- Custom fields



NOTE: Avoid "OTHER" or "MISC," etc. as a category!

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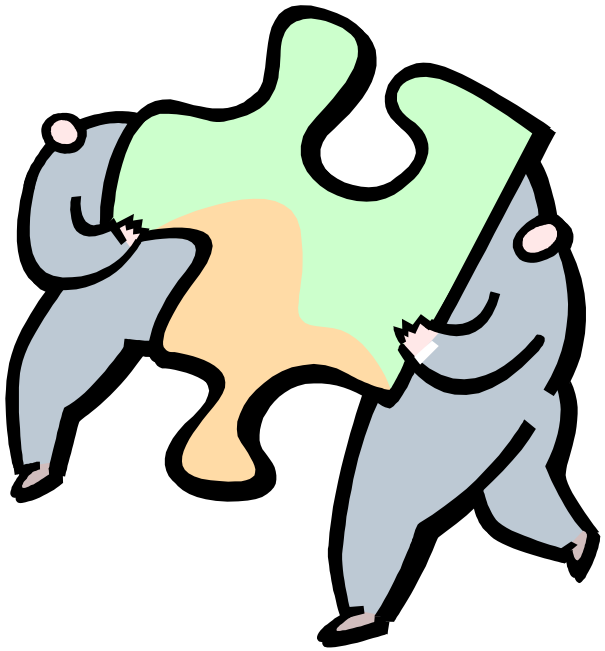
Custom Fields

- Several types of custom fields are available.
- Search on custom fields.
- Use them as any other field.
- Enable/disable custom fields per category item.



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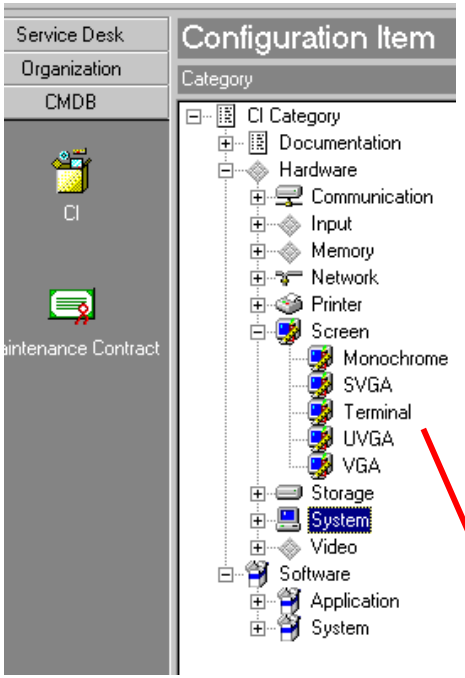
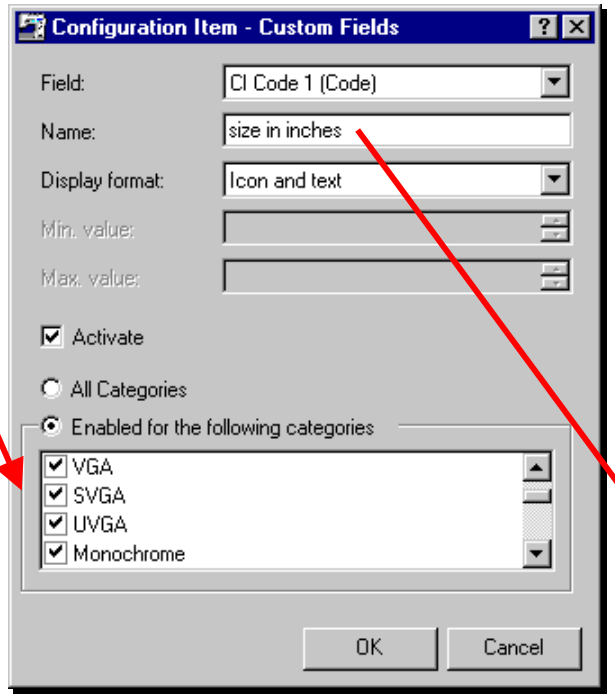
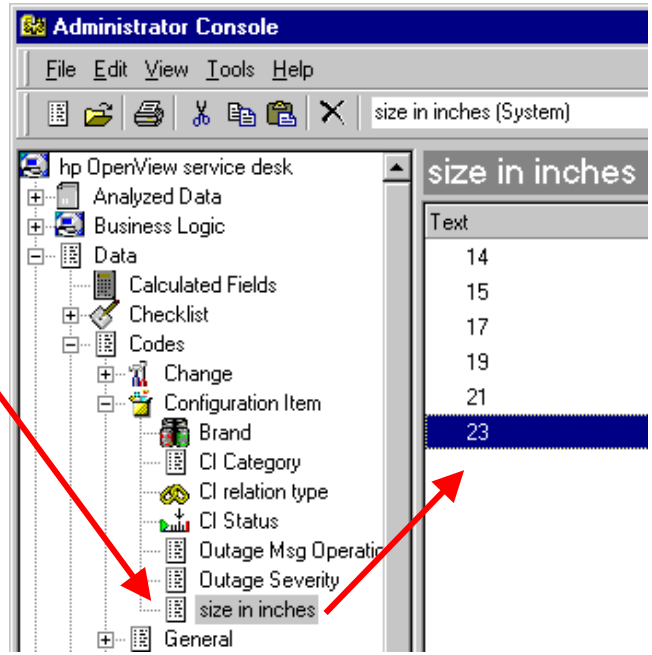
Category Structure into Practice







Administrator Console:
Data→Custom Fields
Configuration Item

Also=> remember to add this new field to the appropriate forms!

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Let's Start Building the CMDB

- Populate code tables
- Populate CMDB
  - Create Forms, Views and Templates
  - Convert existing databases to Service Desk database
  - Use auto discovery tools
  - Manually enter CIs
- Train users to use Service Desk
- Production

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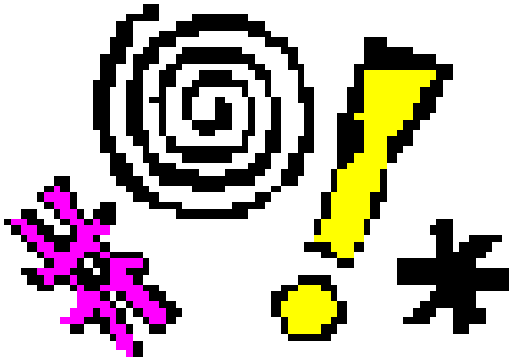
Implications of Decisions

- Maintenance Costs
- Validity
- Not maintainable



- Not in accordance with contracts (suppliers, customer)
- Not able to feed support processes with information
- Not able to produce generic information for management purposes

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Tips and Tricks

- Validation on component relations required
- Work according to a methodology
- Do not go into too much detail (costs)
- Define standards to be able to better maintain CMDB
- Check contracts with suppliers and customers
- Remember that setting up the CMDB is an iterative process

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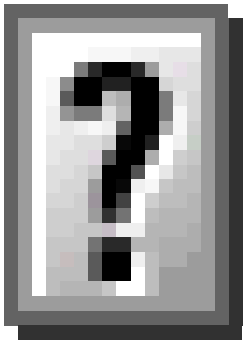
Key Questions: Configuration Management

- Which Configuration Items(CIs) will populate your Configuration Management Database (CMDB)?
- What level of detail will your CIs have?
- What will the IT organization use as valid statuses for (CIs) during their life cycle?
- How will the CMDB initially be populated?
- …



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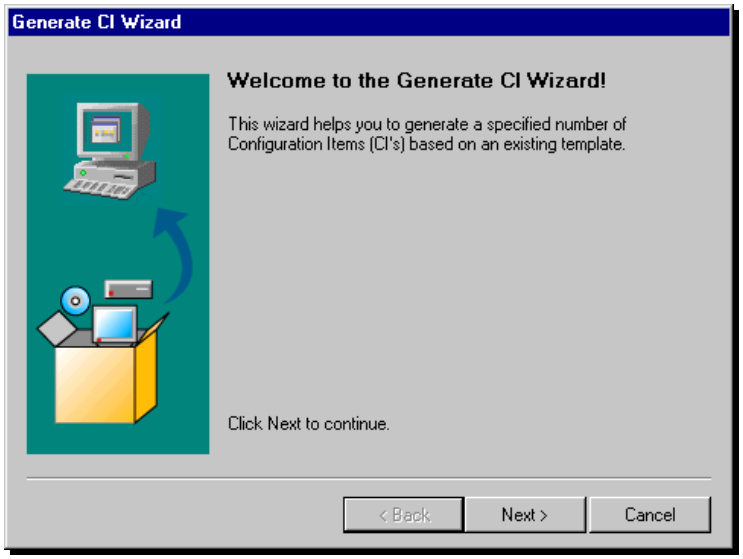
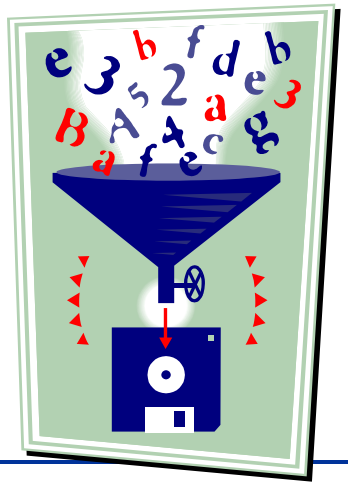
Populating the CMDB



- Manually
  - Using forms/templates
  - Using “Generate CI Wizard”

or via



- Upload through data exchange

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Key Performance Indicators

- % of differences in Registered and actual Configuration item uncovered through audits
- % of complete information
- Access time to retrieve Configuration information

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Best Practices

- **# 1** A Configuration Management process owner must be appointed at a management level high enough to be effective.
-
- **# 2** Level of detail of the Configuration Management Database will be determined by the cost of maintaining the information.
-
- **# 3** Normally CI's are defined down to the lowest level at which a component can be independently installed, replaced or modified.
- **# 4** The primary means of building and maintaining the Config. Management databases will be dictated by the validity and integrity of the data as well as the ease of data migration. Accordingly, this process could be either automated electronic transfer or manual data population.
-
- **# 5** All CI's, be they hardware, software, or documents, will be electronically and physically validated on a regular basis.

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Let's:

- go see the tool…
- do some exercises…
- have a break…

Helpdesk Management

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Objectives

- Explain the concept of a Service Call and Incident
- Demonstrate the tools used to assist with the entry and solution of a Service Call or Incident
- Demonstrate familiarity with the Service Call and Incident screens and their use

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Mission

"The Helpdesk is the single point of contact between the user community and the IT organization. The Helpdesk seeks to restore IT services as soon as possible after a service call or incident has been reported."

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Relationships of Helpdesk Management

- Configuration Management
- Problem Management
- Change Management
- Work Management
- Service Level Management

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Scope

- A Helpdesk supports all of the services the IT organization provides
- Usually, the service level manager (or account manager) indicates who customers are by referring to the provided services

ITIL Definition:
an incident is
a service disruption

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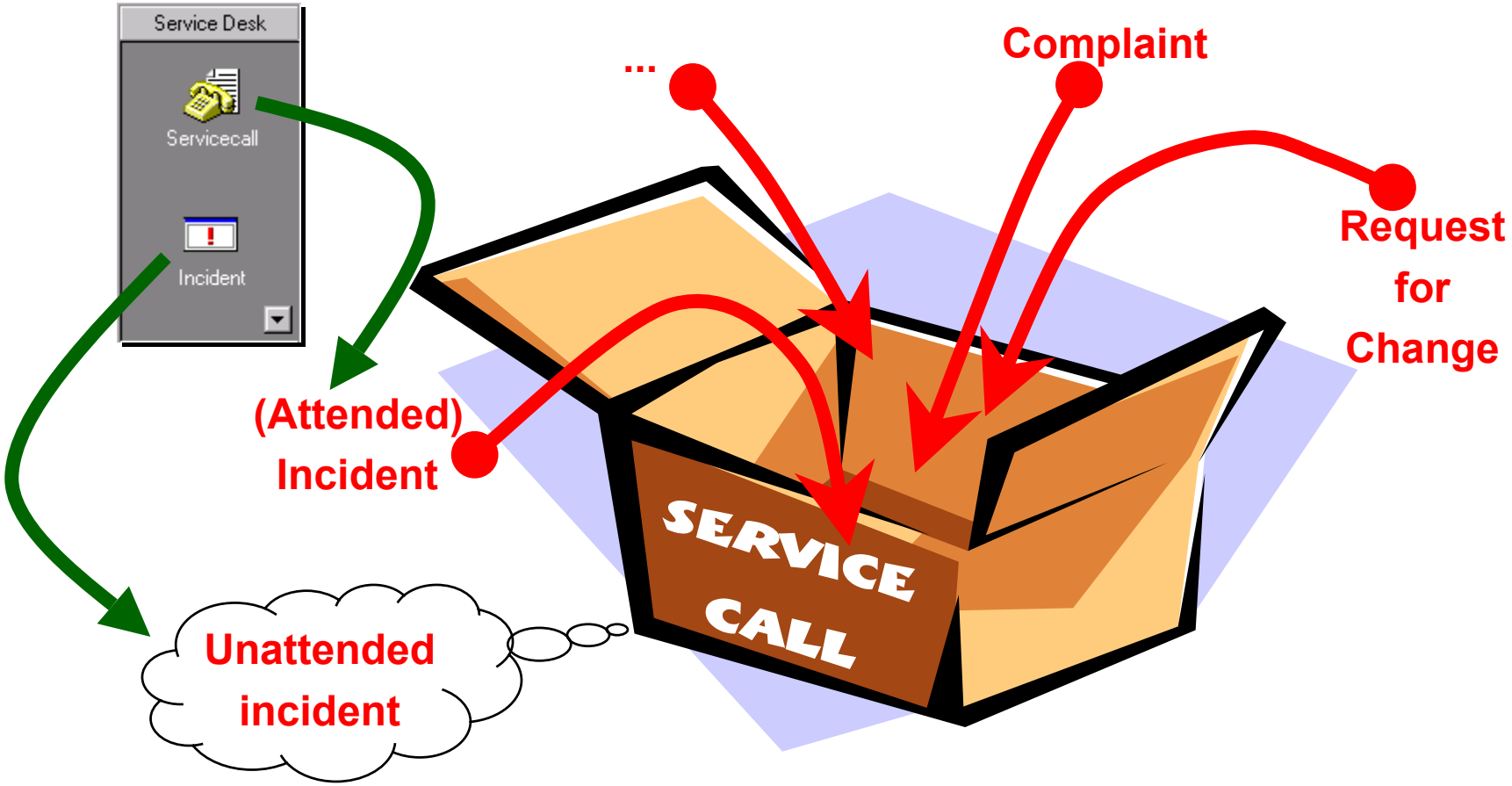
Difference between Service Desk Items "Service Call" and "Incident"



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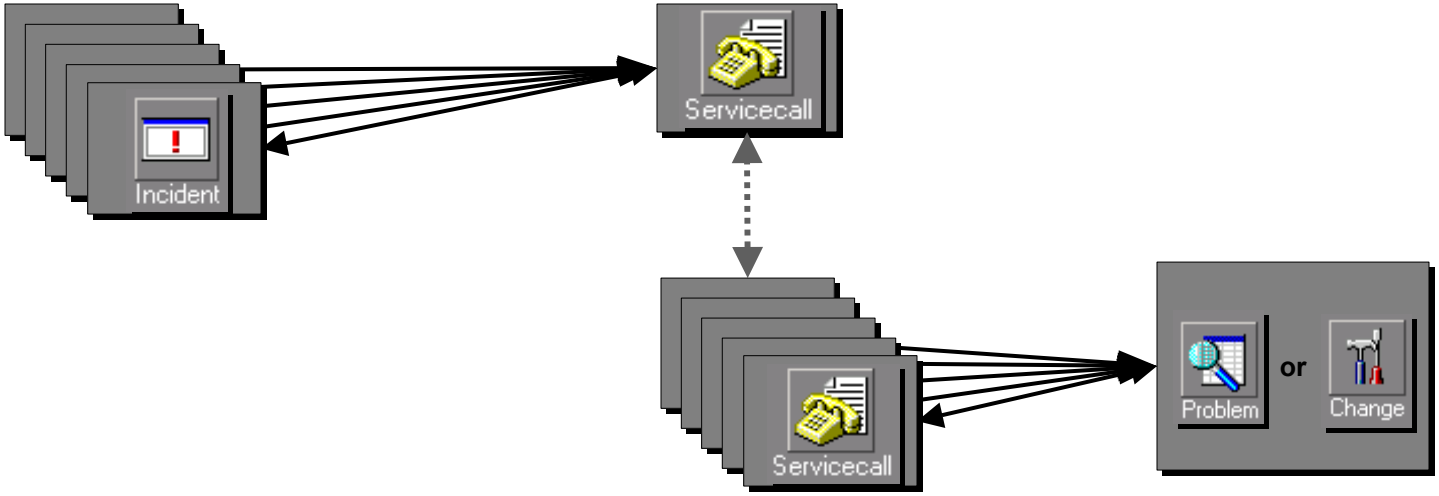
Linkage in Service Desk



- You can <u>not</u> link incidents to incidents or service calls to service calls
- You <u>can</u> link as many work orders, or users as you like to all items shown above
- You <u>can</u> link service calls to a problem **OR** change

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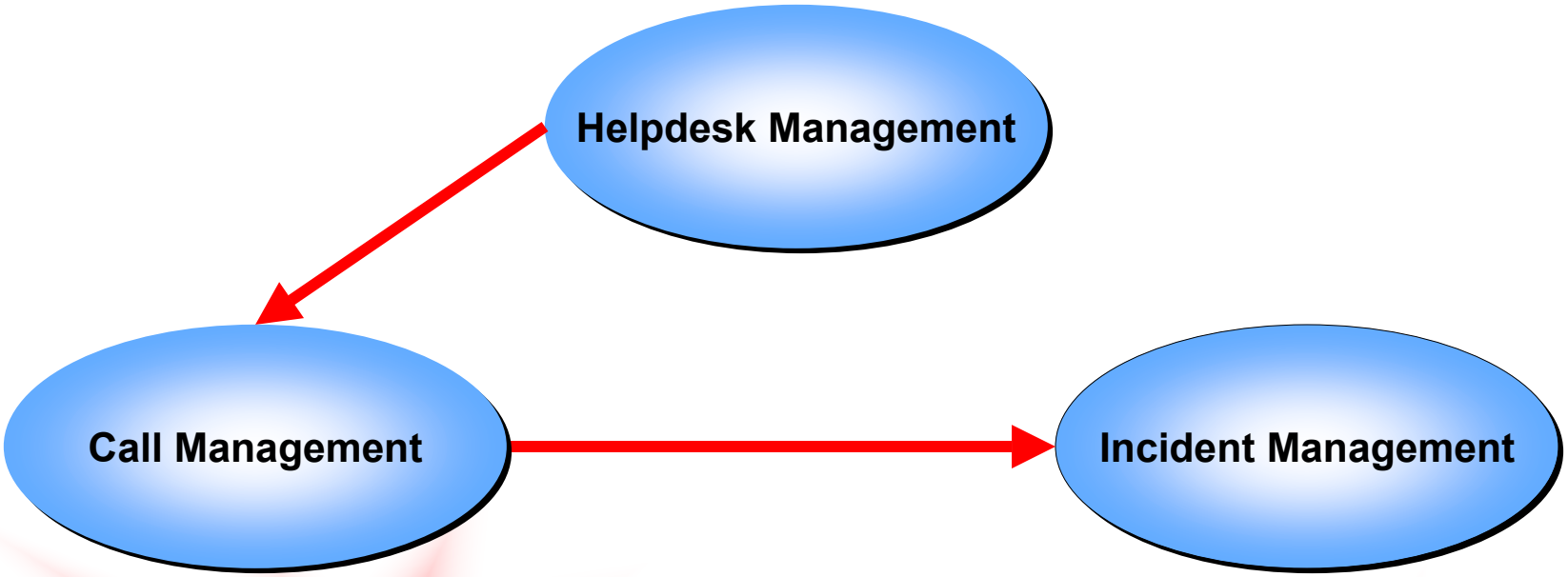
…A Bit of Theory



Separate procedure:

- **What kind of call is it?**
- **Does it belong to the Helpdesk?**
- **Is it a complaint, request for change, regular question, user support, etc?**

- see next slide -

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Incident Management Objective

- Directive:
  - To restore normal services with a minimal impact on the business and the user community
  - Ensure that the best achievable levels of availability and service are maintained

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Incident Management Activities

- Communication and Promotion
- Providing Management Information
- Support for Business Operations
- **Incident Control**

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Definitions

- Incident
  - Any event that causes, or may cause, an interruption or degradation to the quality of service
- Examples of Incident
  - Application unavailable or in error
  - Hardware outage or constrained use
  - Service Request for info or assistance

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Activities: Incident Control

- Recording and Alerting
- Initial Support and Classification
  - FAQ?
  - Category: Complaint; Incident; Request for Change, Documentation, Training, Information,…?
  - Classification: Hardware, Software, Network,…?
- Investigation and Diagnosis
- Resolution and Discovery
- Closure
- Incident ownership, tracking, communicating

Turn this into a flow

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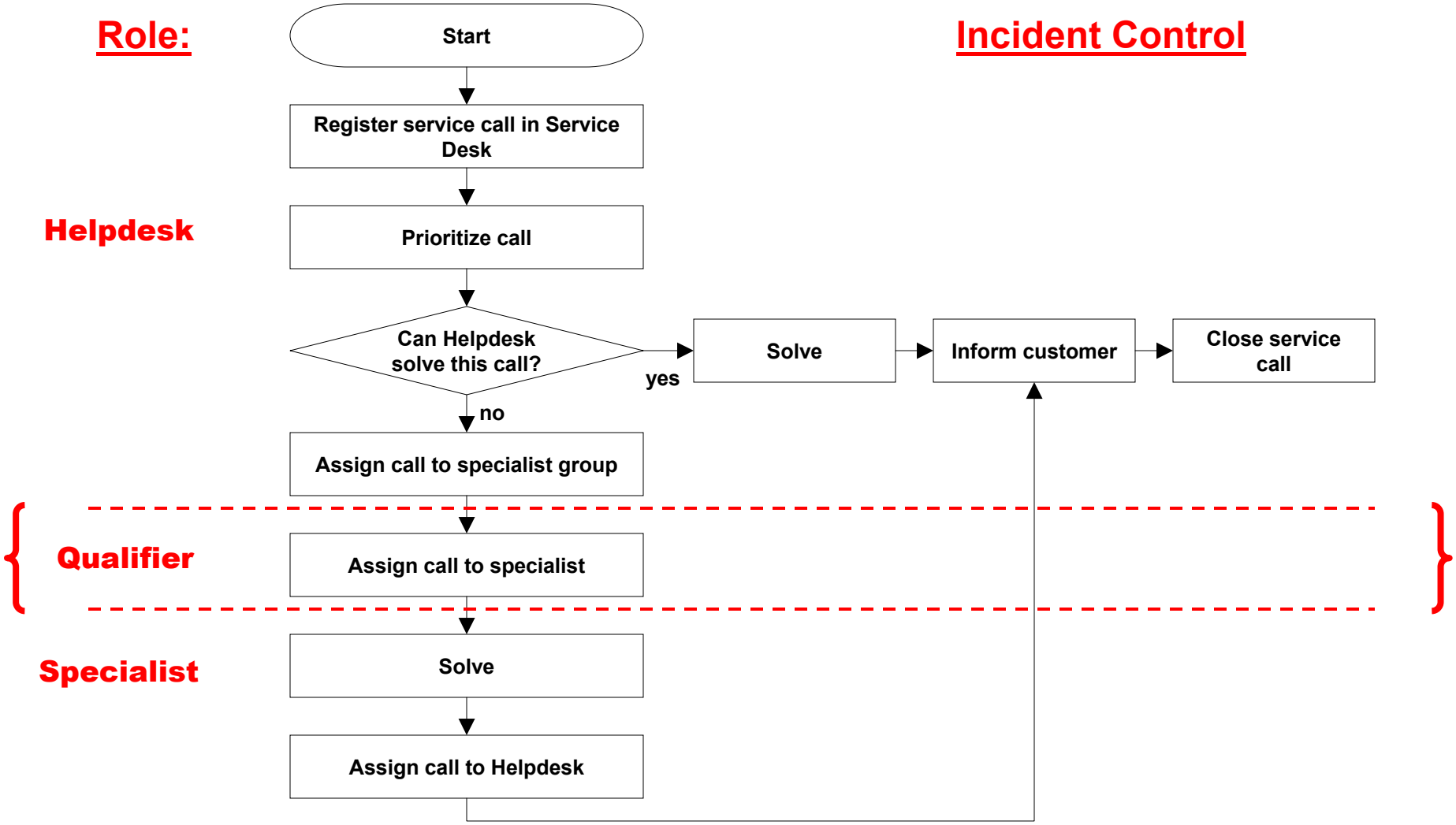
Simple Incident Control Flowchart



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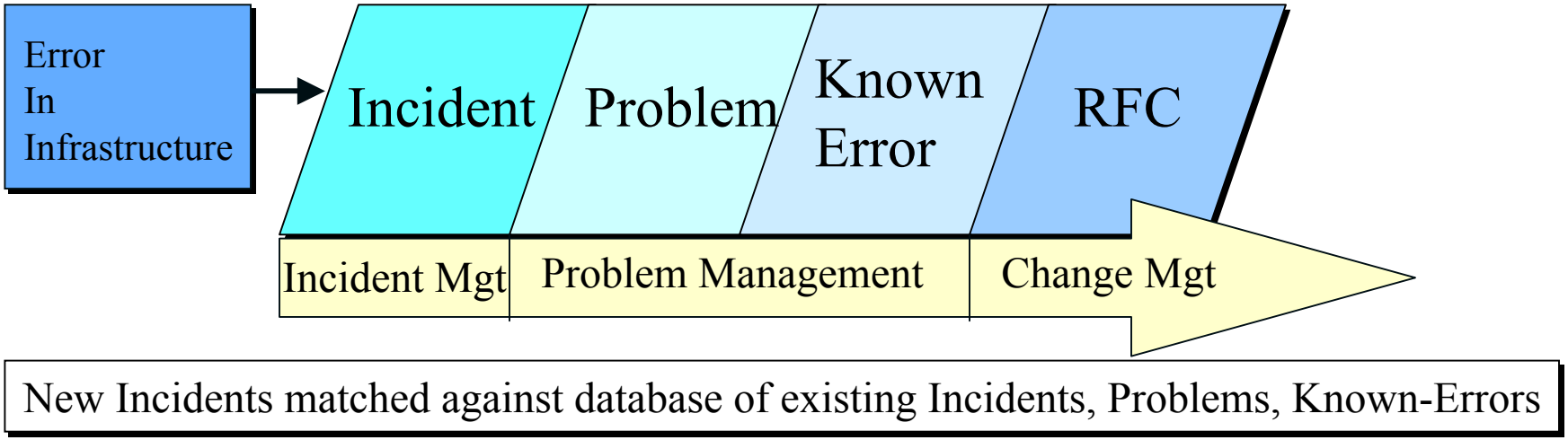
Relationships

- Incidents, Problems, Known-Errors
  - Incident: an event that causes service disruption
  - Problem: represents an unknown error in one or more CIs
  - Known-Errors: Once root cause has been identified and RFC generated to solve it, it becomes a Known-Error record



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Planning Considerations I

- User interaction
- Setting up proper Service Desk environments
  - Management buy-in
  - Incorporates business need
  - Ensure that solution aligns with the business strategy
  - Clear deliverable & expectations
  - Phased implementation approach
  - User awareness
  - Internal awareness
  - Sell benefits to partners
  - Process training (train IT staff to be Service staff)
- Choosing Process & Organization complimentary technologies

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Planning Considerations II

- Expected Call Volume
- Customer Service Level Expectations
- Central or Distributed Structure
- Trouble Ticket Distribution
- Escalation Levels
- Isolation & Diagnostic Tools & Procedures
- Organization Structure
- People Training

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Strategic Questions

- What are client expectations relative to Service Restoration? - Immediate, 4hrs.
- What types of items (issues, problem, questions, etc.) will we manage? – All
- Who and where are our customers (US, Europe, Global, etc.)?

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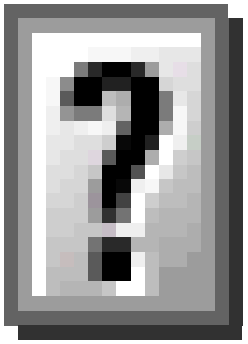
Key Questions: Helpdesk Management

- What different kinds of Service Calls can you recognize?
- Will the Service Call item be used for incident resolution support?
- Which workgroups within the IT department have responsibility for solving service calls and participate in the helpdesk process?
- …



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Other Considerations

- Statuses and other code tables
- Forms, templates and views
- Checklist Wizard
- Service Pages
- Knowledge base(s)
- Unattended incidents
- Inbound and outbound email
- Database rules

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Statuses

Service Call Status:

- used for incident control
- communicated to user
- viewed by the user using the Service pages
- Registered, In Progress, Waiting, Completed, Informed, Closed

Assignment Status:

- used by the internal IT department
- not communicated to the outside world
- cannot be viewed by an end-user using the Service Pages
- New, Accept, Reject, Ready

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Impact, Priority, & Urgency

- Urgency Level
  - Determines how fast you need to resolve the incident
- Impact Level
  - Based on the impact upon the business service
- Priority Level
  - Drives resource allocating decision. Based on Urgency and Impact
- Major Incidents
  - Many users are impacted; threatens business disruption
  - Problem Management needs to be notified ASAP

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Service Call Status - Example

Trouble Ticket Status Table

STATUS	SET BY	WHEN
New	Service Desk Specialist	User Call, System Detected
Rejected	Service Desk Specialist	User Call
In Progress	Service Desk Specialist, Technician, Tier II, Tier III	Assigned to person
Problem Diagnosed	Service Desk Specialist, Technician, Tier II, Tier III	Upon find out all pertinent data
Problem Resolved	Service Desk Specialist, Technician, Tier II, Tier III	Solving
Test Phase	Service Desk Specialist, Technician, Tier II, Tier III	Retest service
Service Restored	Service Desk Specialist, Technician, Tier II, Tier III	Return to full operation
Closed	Service Desk Specialist	User satisfied, documentation complete

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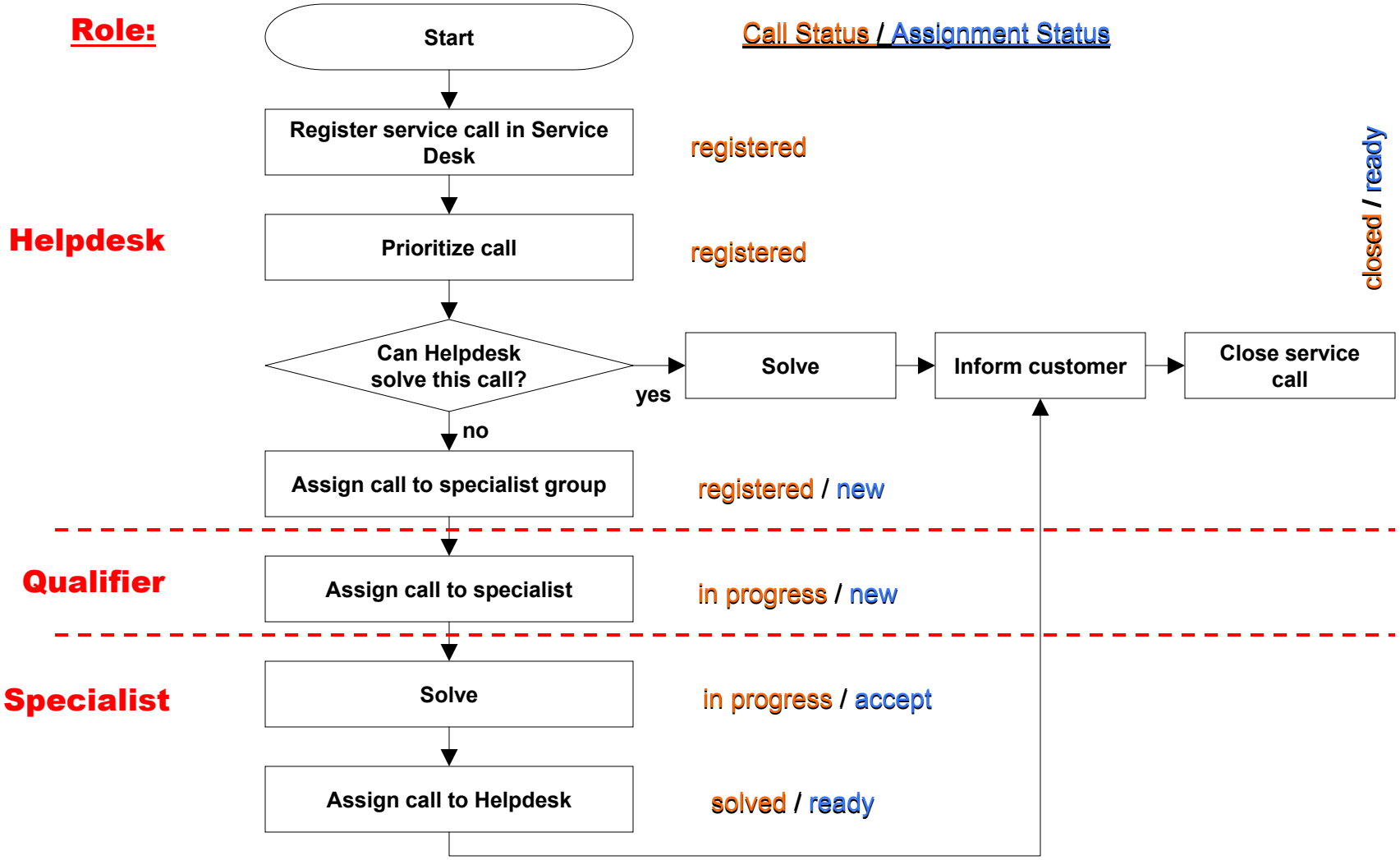
Service Call and Assignment Status: *An Example*



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Key Performance Indicators

- Average resolution time
- % and # of calls dispatched to the specialist
- % and # of calls that need to be re-dispatched
- % of calls resolved in time
- # of complaints
- service call duration by type, impact, workgroup
- service call volume by type, impact, workgroup
- % and # of calls exceeding SLA
- % of calls resolved (closed) by workgroup
- % and # of calls re-opened

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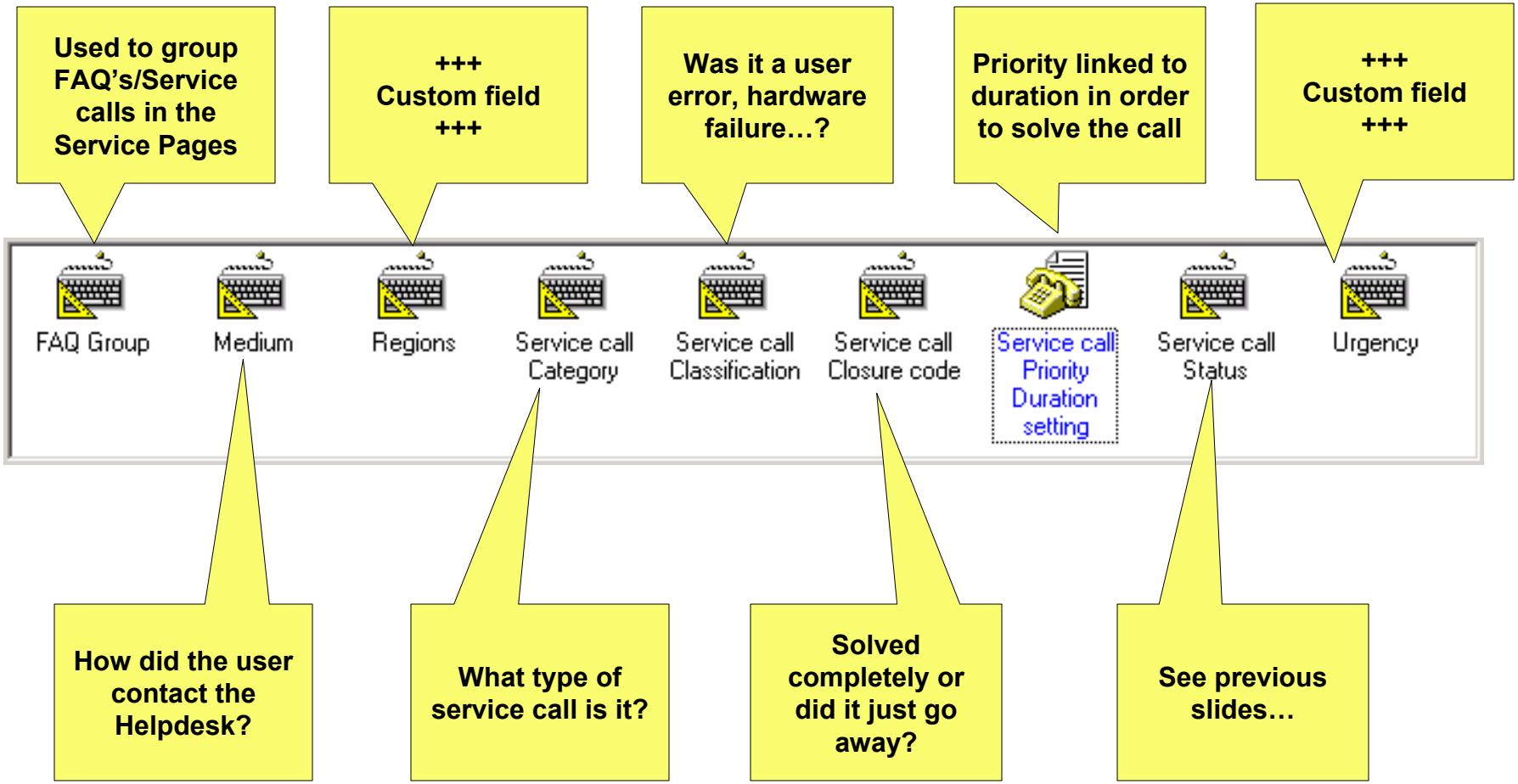
Other Code Tables…



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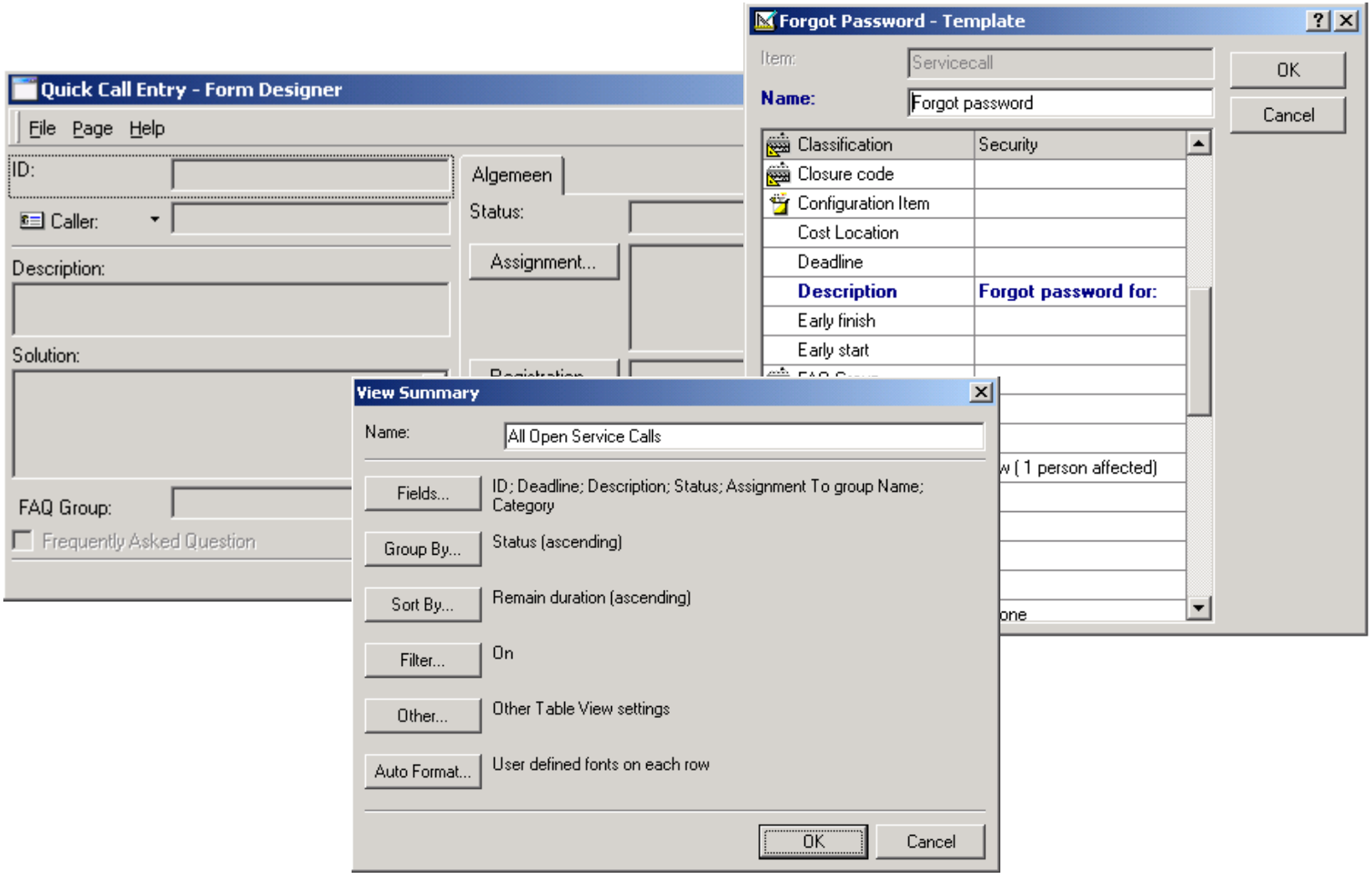
Forms, Templates, and Views



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Form Development

- Best Practice
  - Limit the number for differing forms
  - Ensure that all required fields exists
  - Determine form restrictions and usage based on Role definitions
  - Link form with an appropriate template
  - Objective is to record pertinent information with-out gathering unnecessary data
  - Communicate the definition and usage of each field in the form: Why it exists, When its needs to be filled, Who can fill it, etc.

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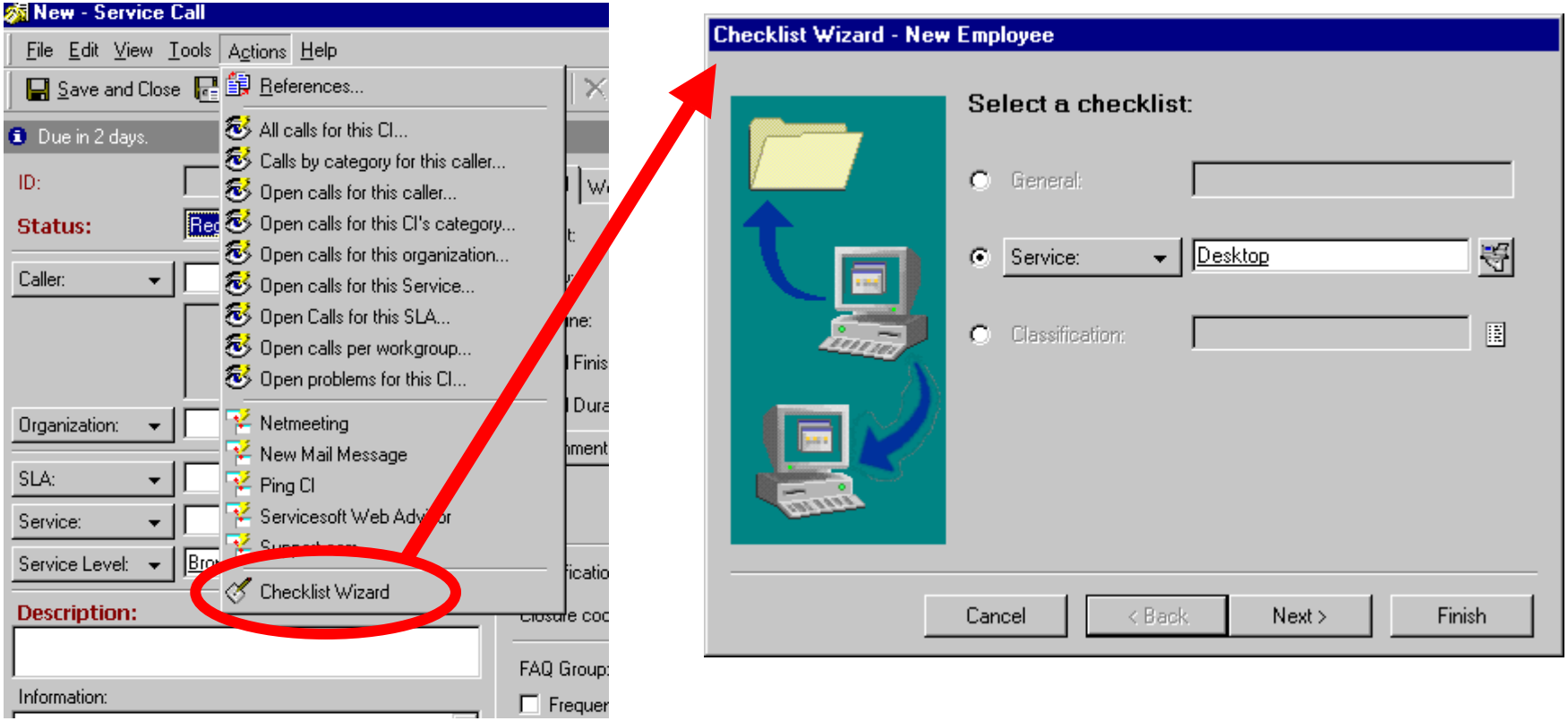
Checklist Wizard



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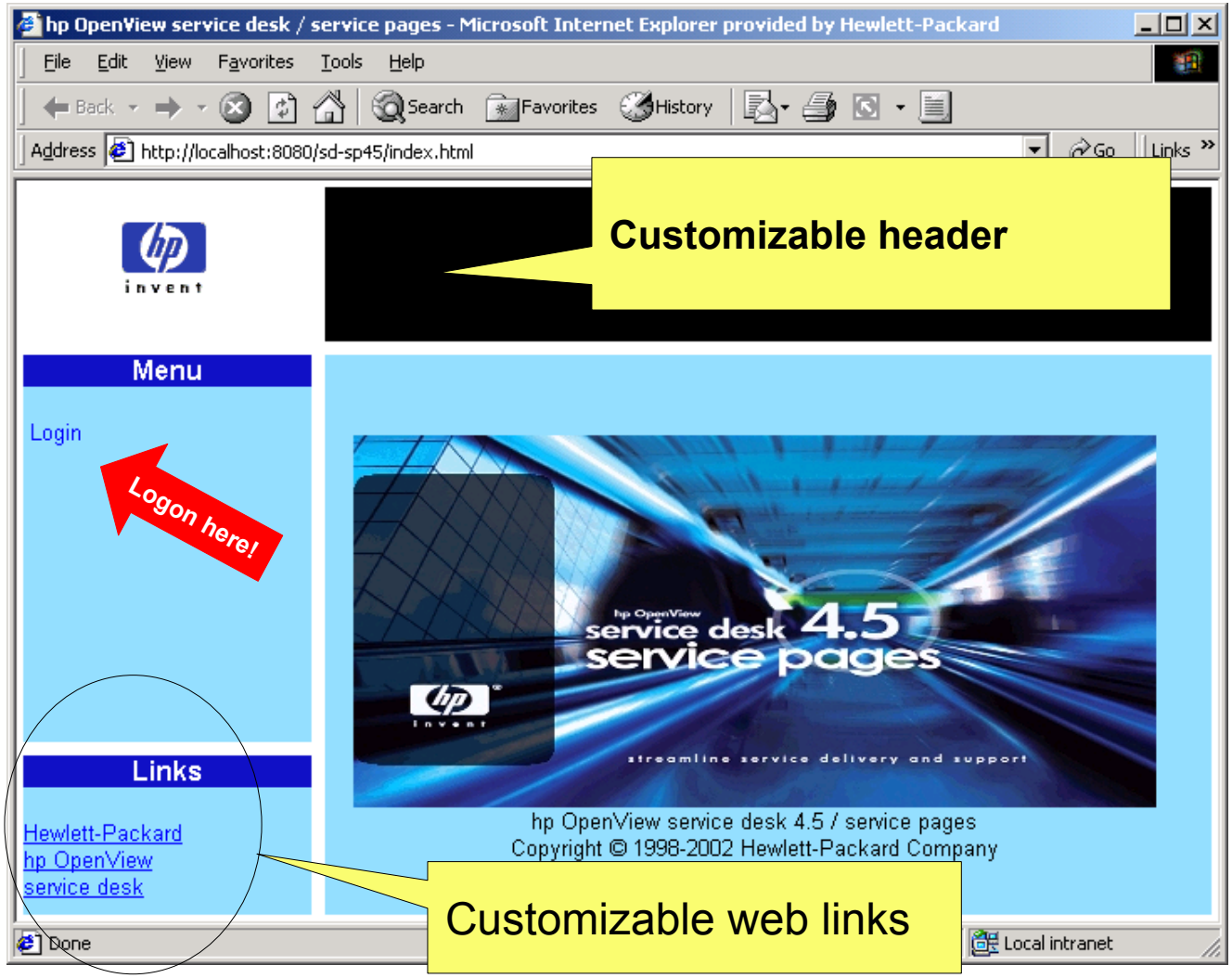
Service Pages (SP)

Initial screen



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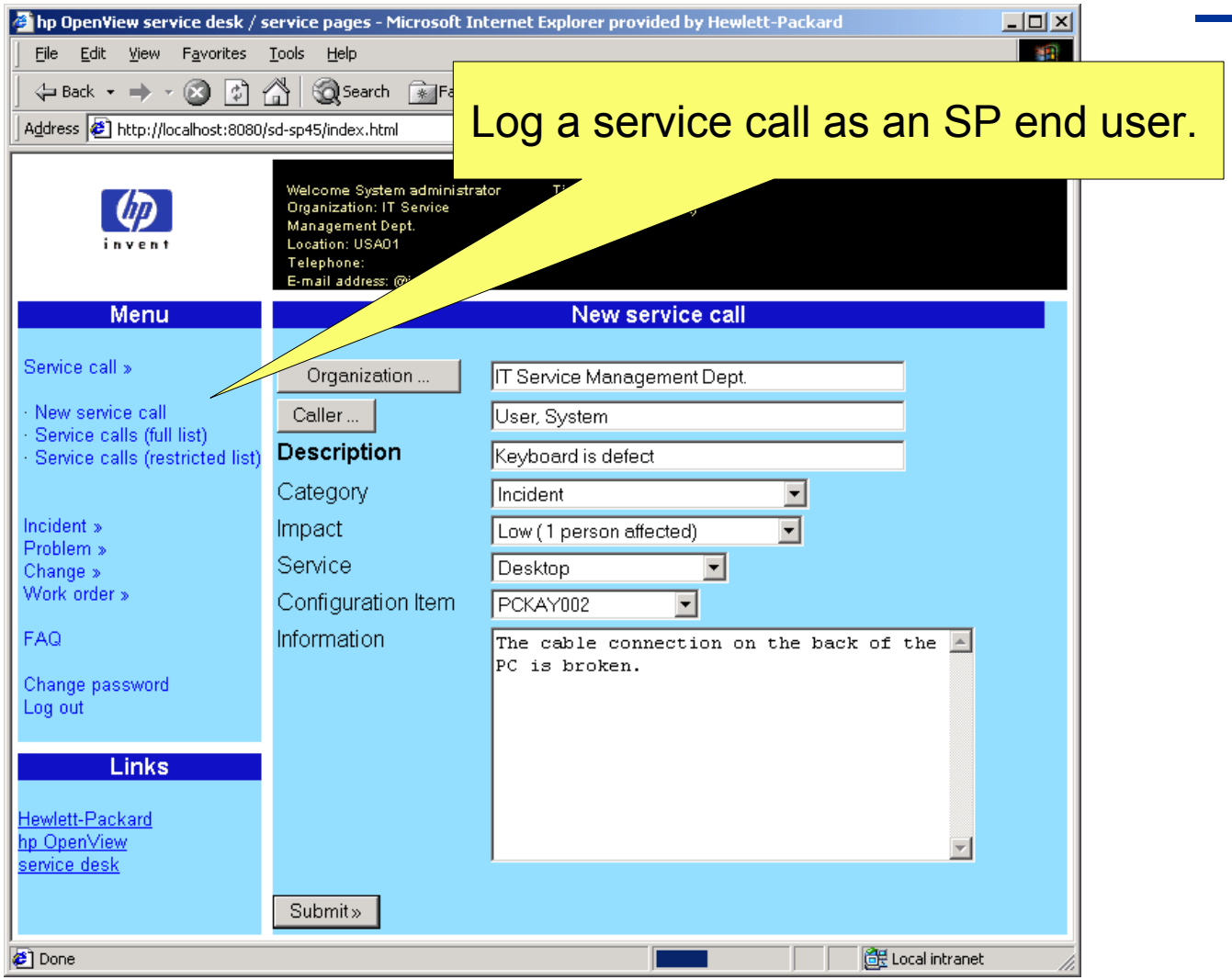
Service Pages (SP)

New Service Call



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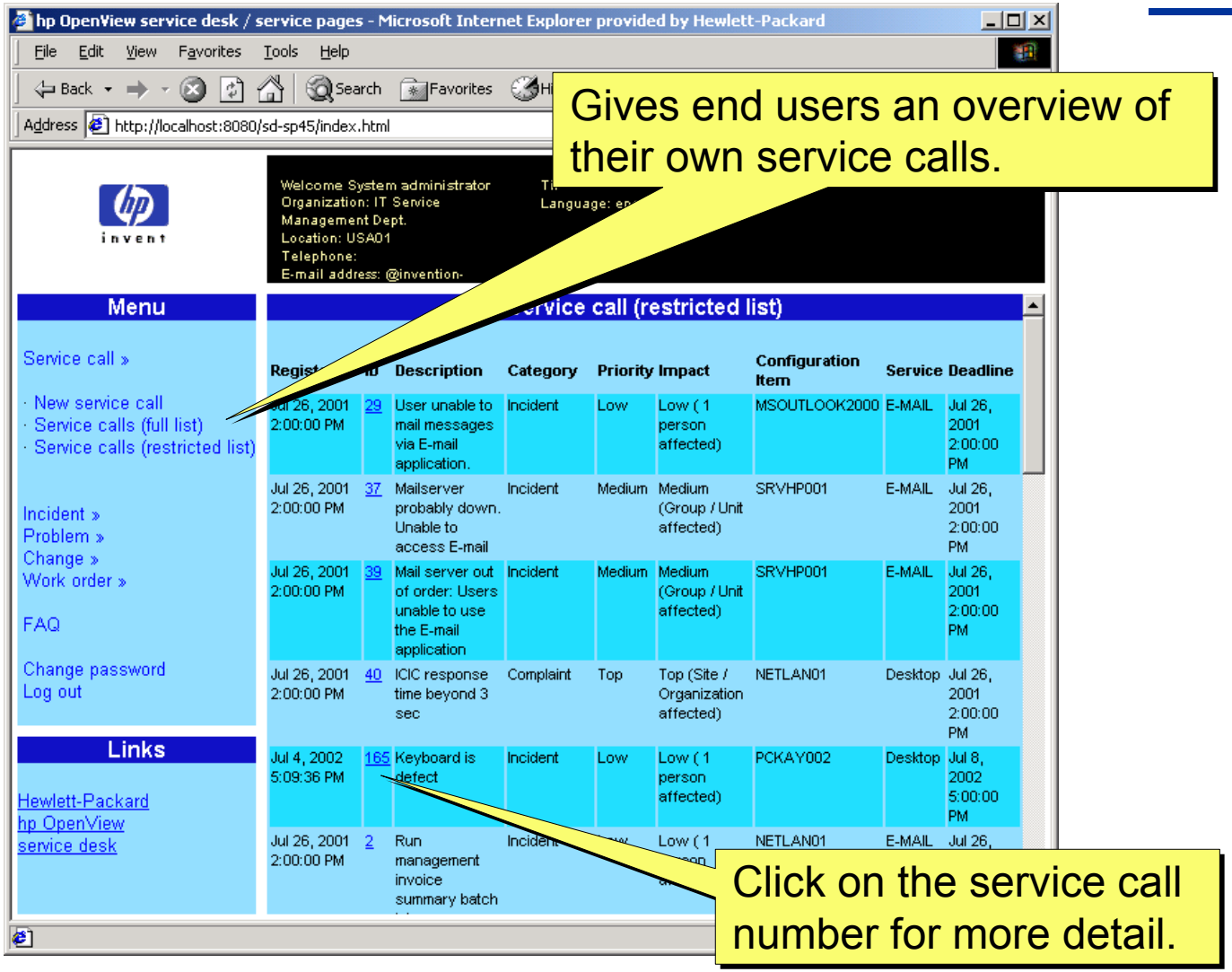
Service Pages (SP)

List Requests



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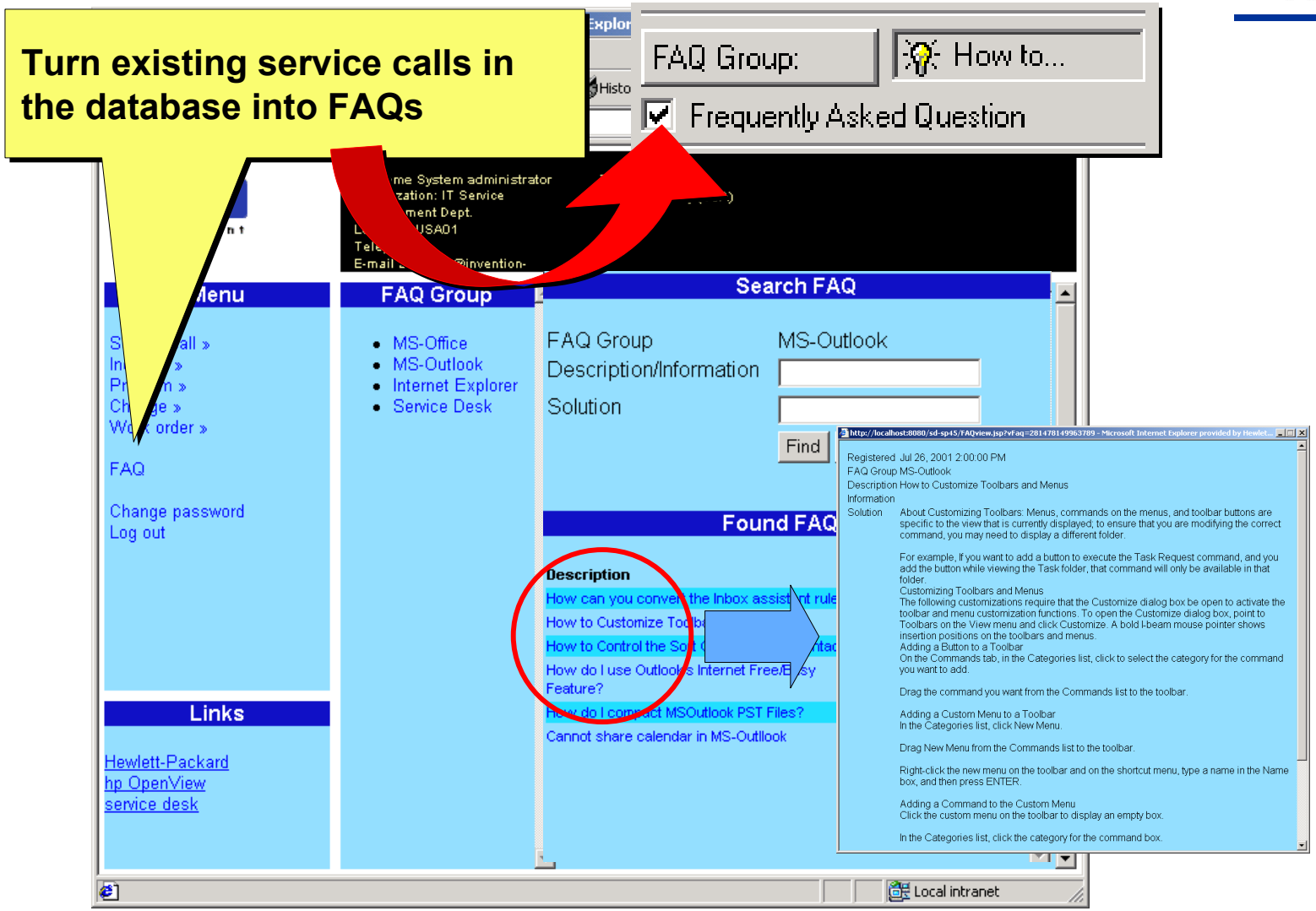
Service Pages (SP)

FAQ



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Knowledge Base

- Own history
- FAQ's
- Links to 3rd parties/ partners:
  - Self Service Portal:
    - Motive
  - Software Reliability Management:
    - Support.com
  - Web enabled knowledge management tools :
    - ServiceWare

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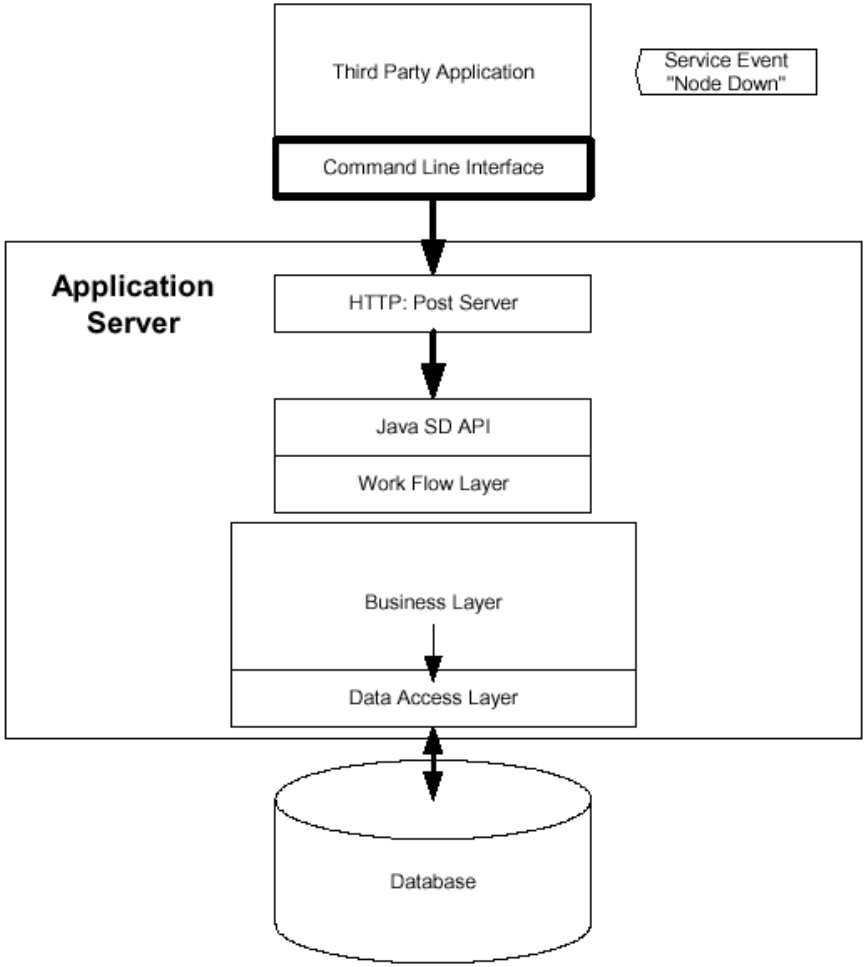
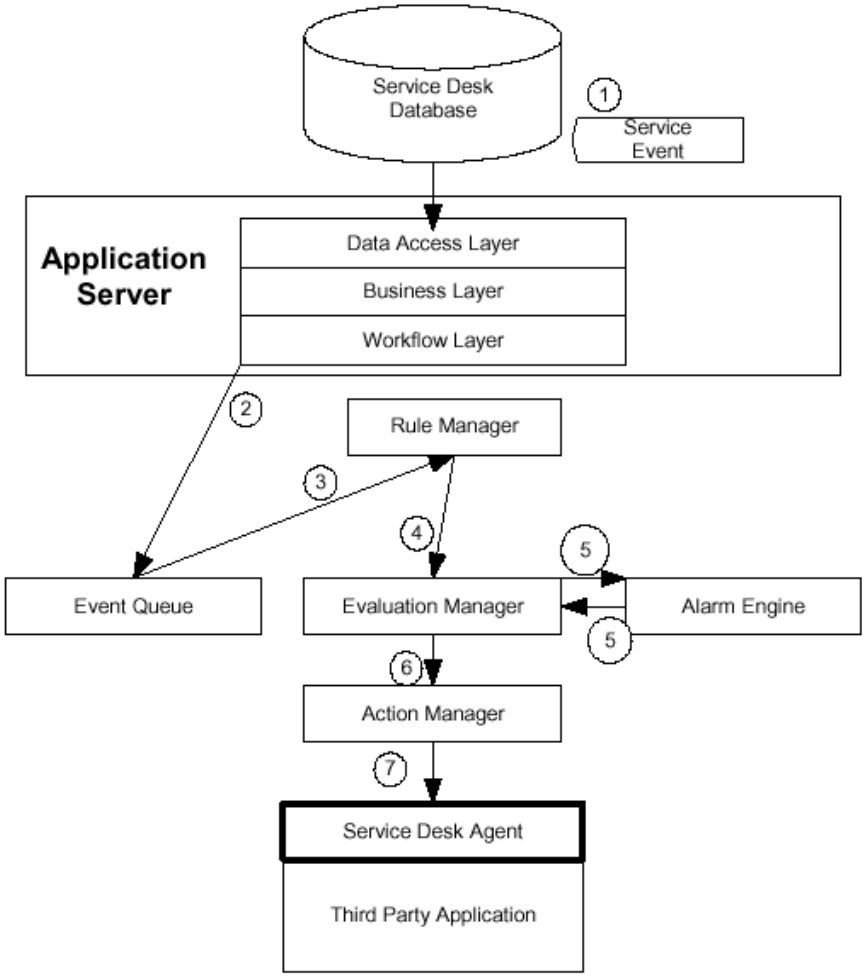
Unattended Incidents/Events

Inbound Service Events



Outbound Service Events



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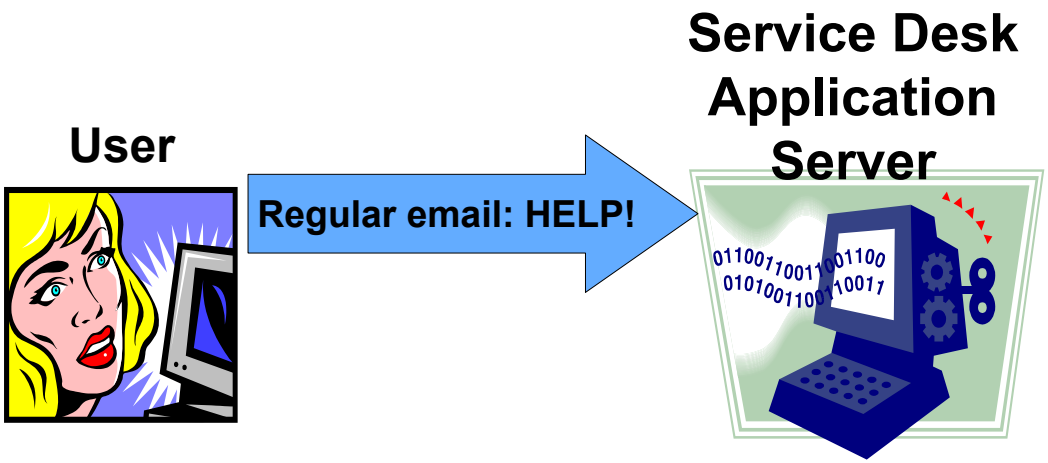
Inbound Email



E-mail settings in Administrator Console, System Panel, E-mail.

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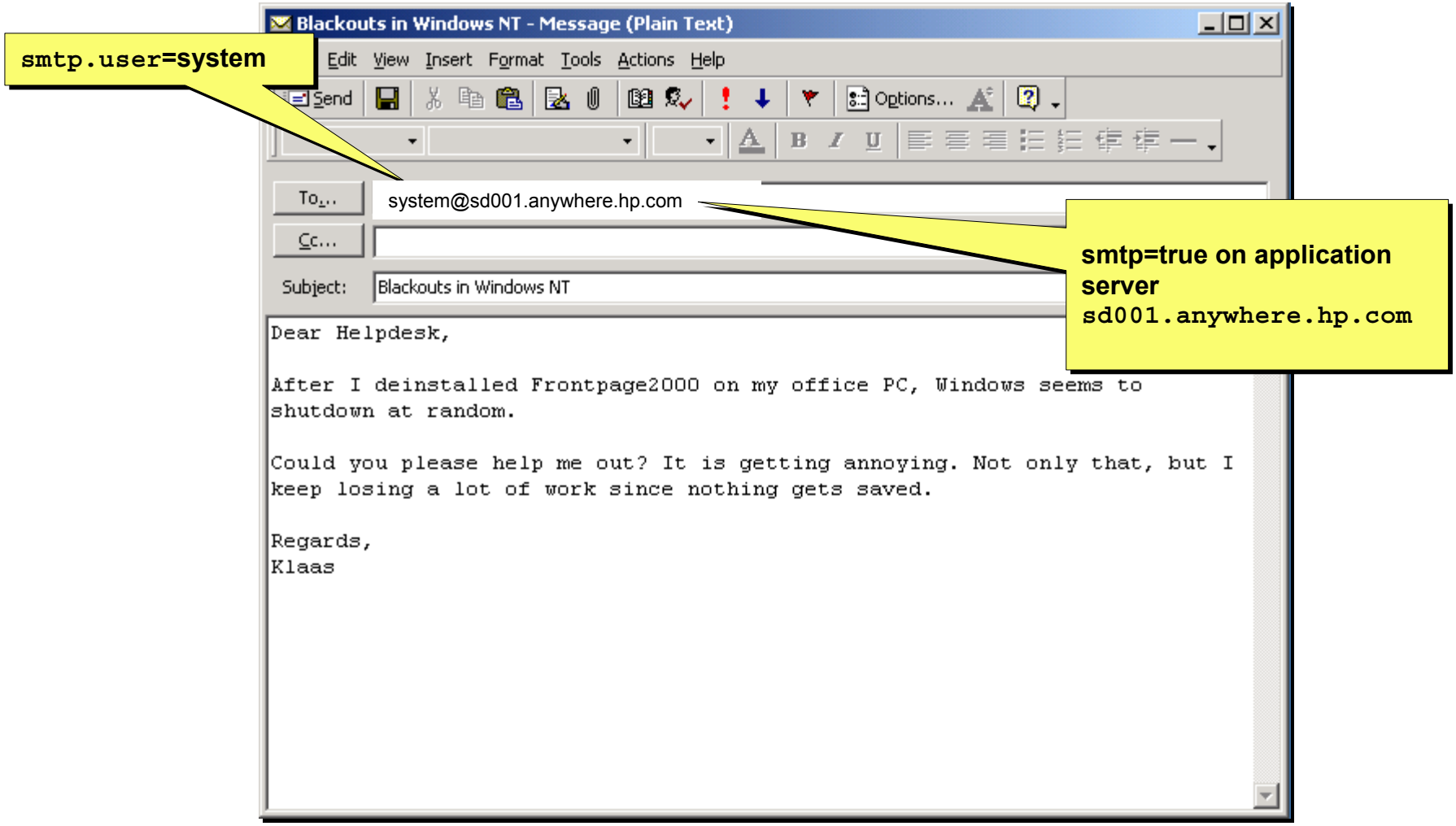
Regular Email from User: “HELP”



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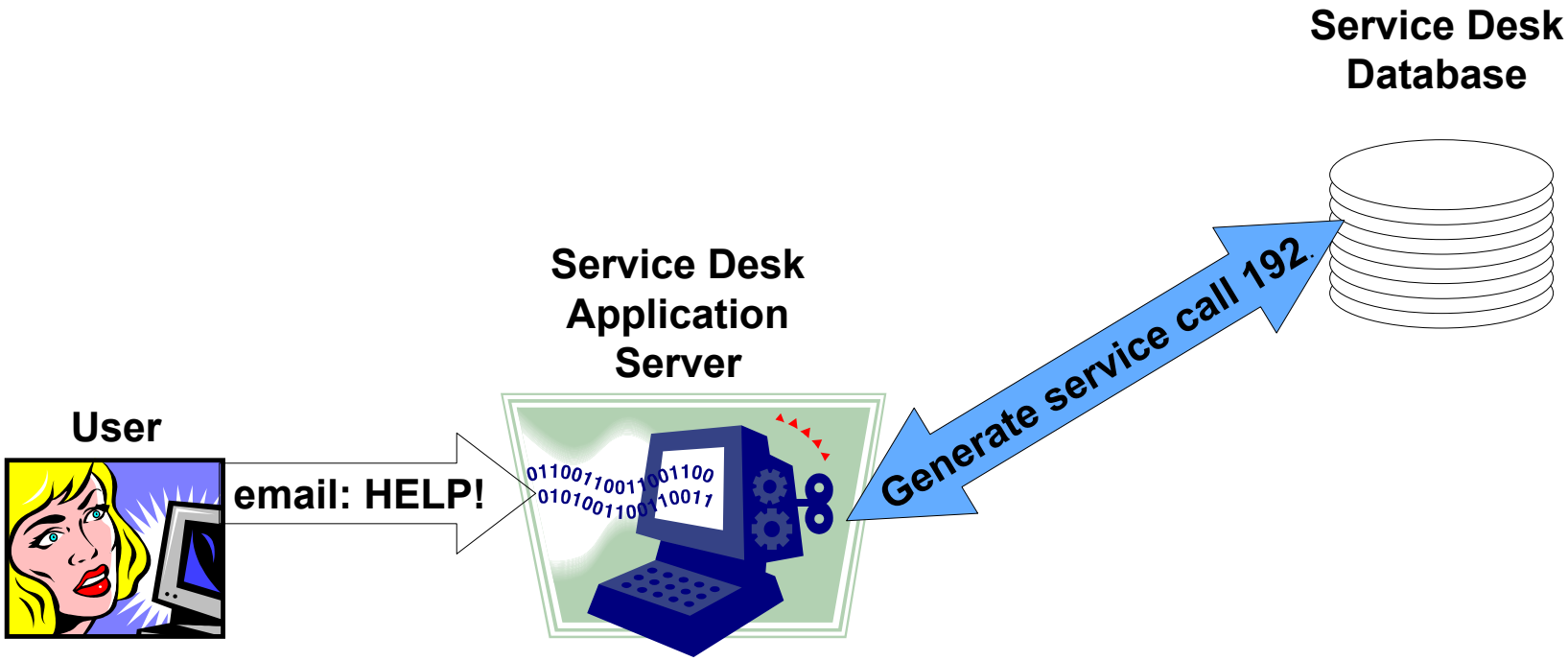
Generate an Automated Service Call



Email generates a ***Service Call***

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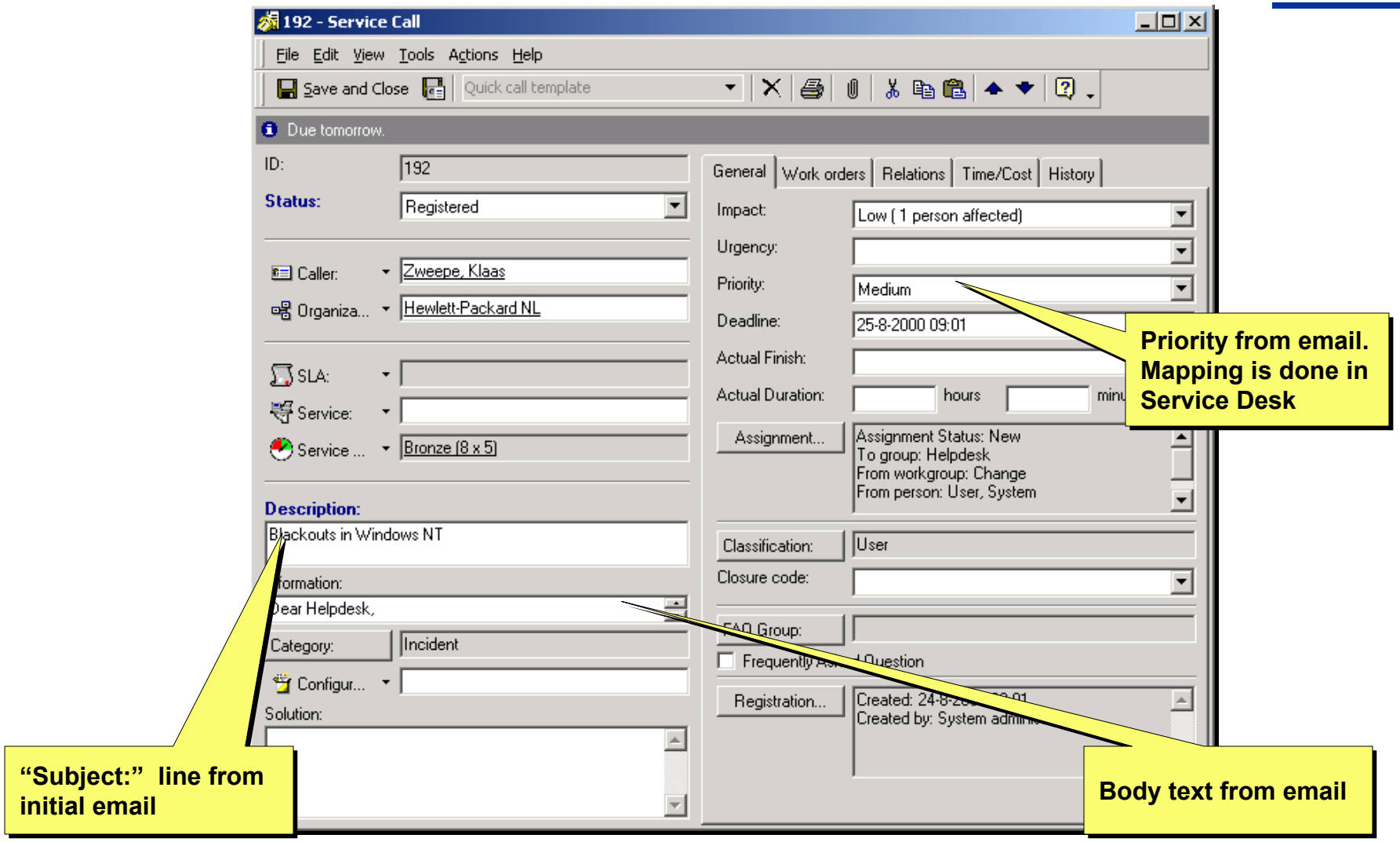
The Generated Service Call



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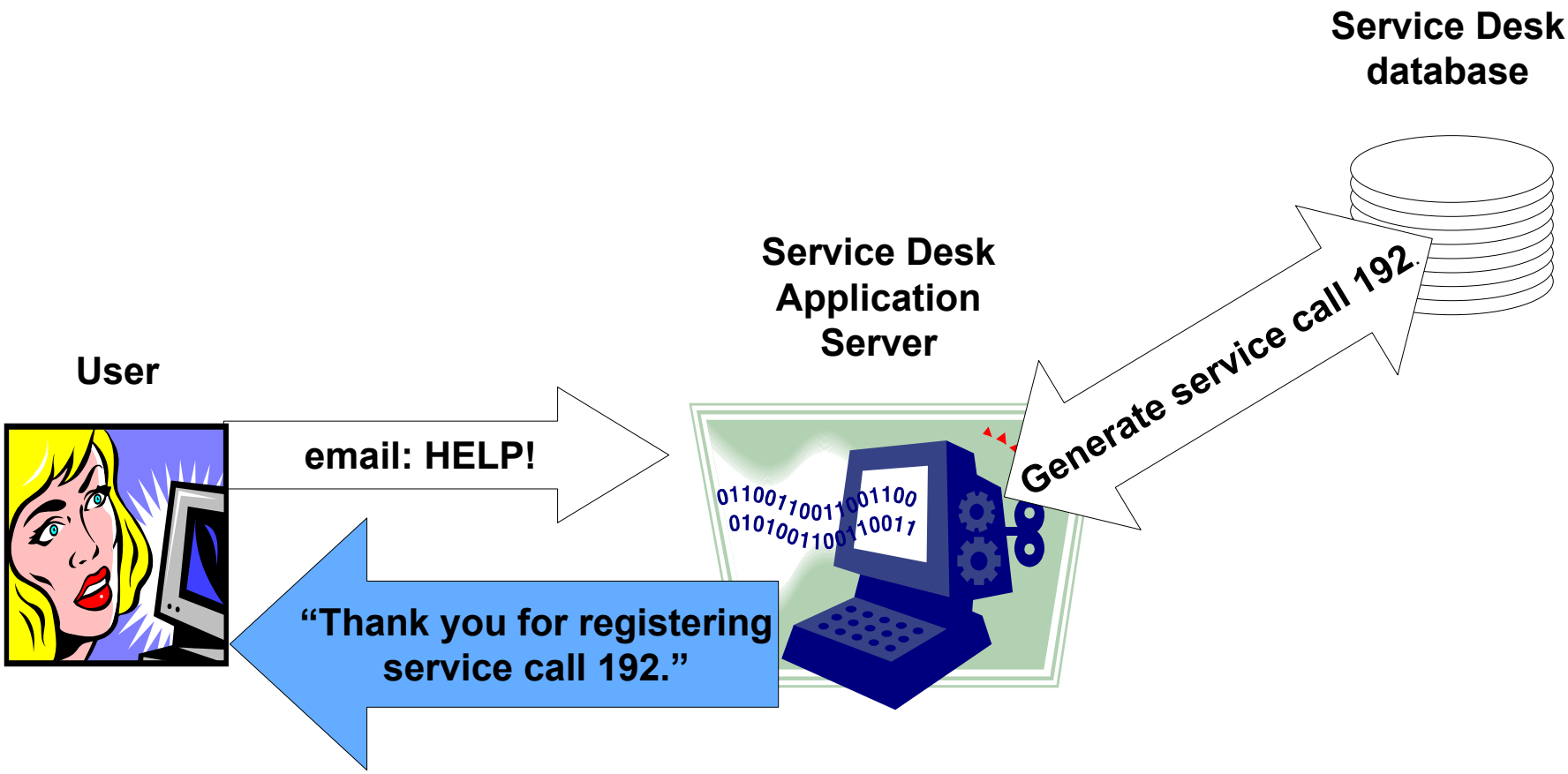
Confirmation Email with Service Call Number



The application server sends a confirmation email back to the user.

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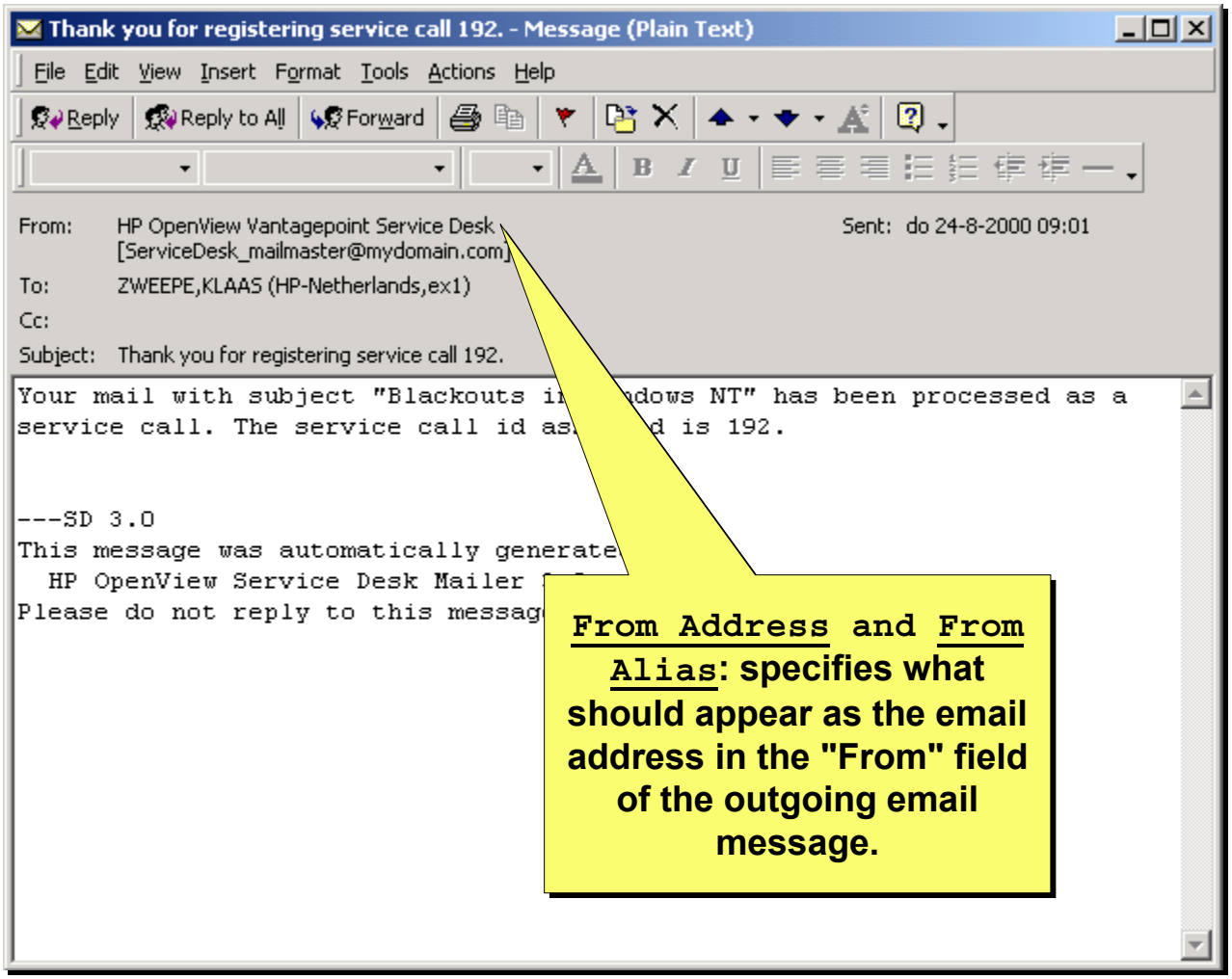
“Thank You for Registering Service Call <ID>”



From Address and From Alias: specifies what should appear as the email address in the "From" field of the outgoing email message.

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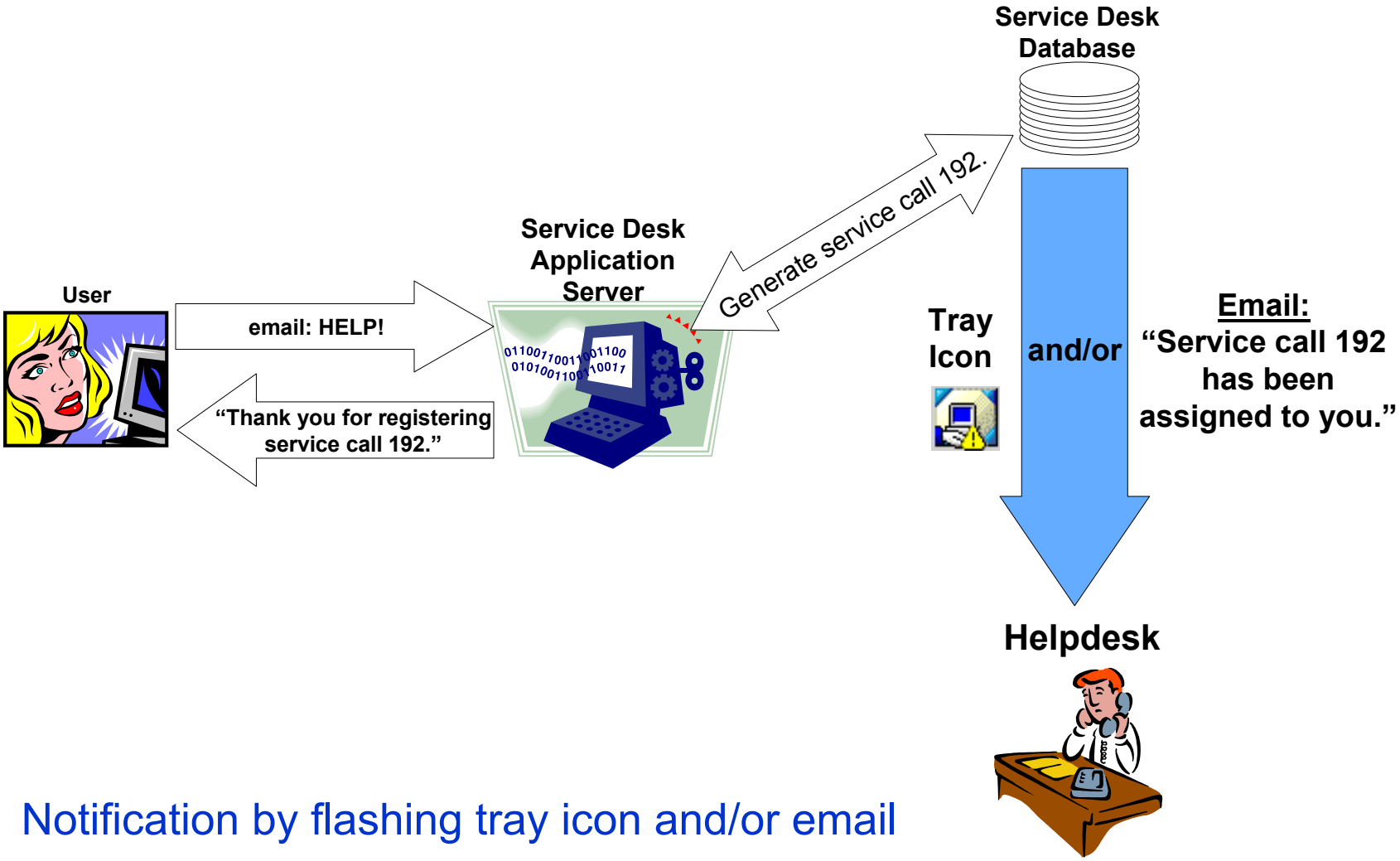
The Helpdesk Is Notified…



Notification by flashing tray icon and/or email

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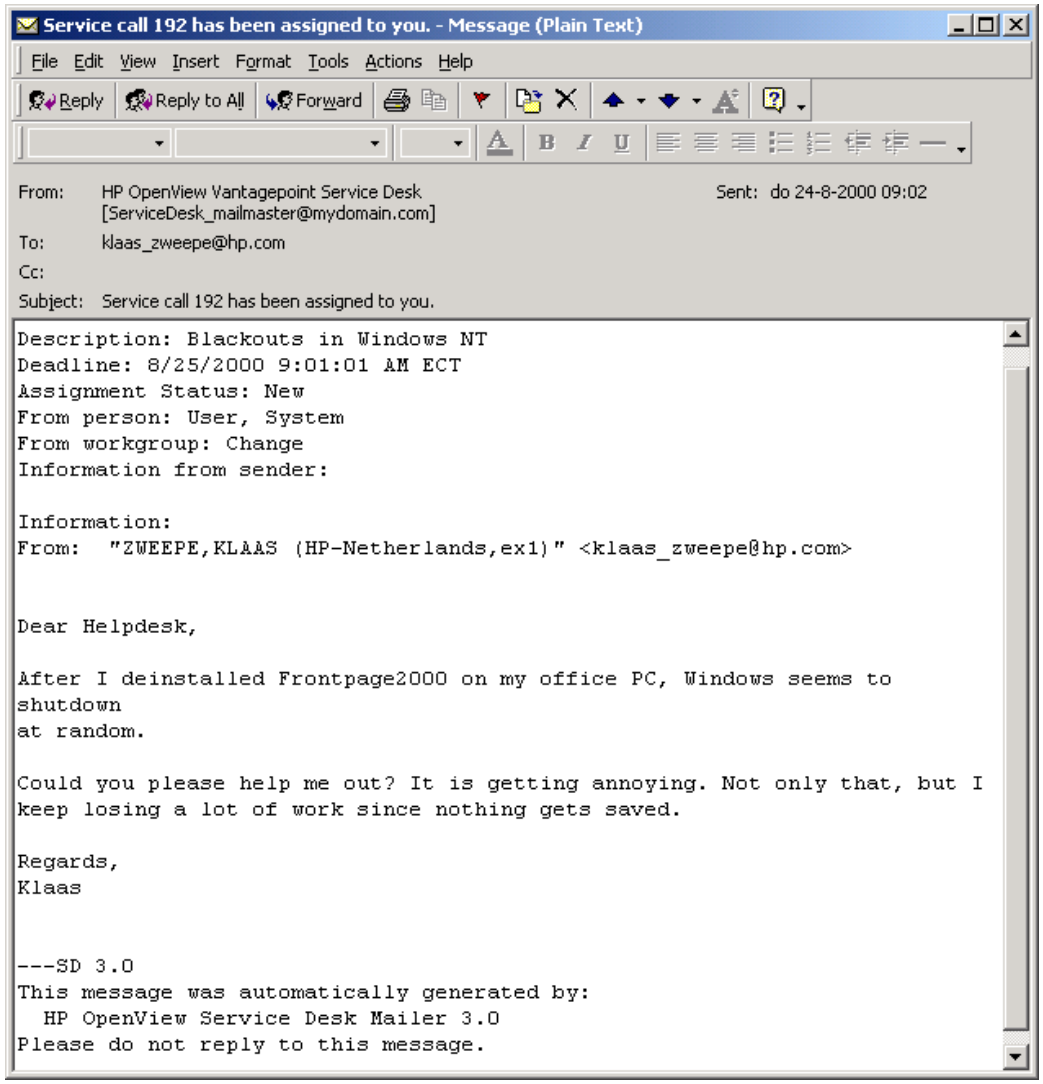
“Service Call <ID> Has Been Assigned to You”



Service call 192 has been assigned to you. - Message (Plain Text)

File Edit View Insert Format Tools Actions Help

Reply | Reply to All | Forward

From: HP OpenView Vantagepoint Service Desk [ServiceDesk_mailmaster@mydomain.com]

Sent: do 24-8-2000 09:02

To: klaas_zweepe@hp.com

Cc:

Subject: Service call 192 has been assigned to you.

```
Description: Blackouts in Windows NT
Deadline: 8/25/2000 9:01:01 AM ECT
Assignment Status: New
From person: User, System
From workgroup: Change
Information from sender:

Information:
From:  "ZWEEPE,KLAAS (HP-Netherlands,ex1)" <klaas_zweepe@hp.com>


Dear Helpdesk,

After I deinstalled Frontpage2000 on my office PC, Windows seems to
shutdown
at random.

Could you please help me out? It is getting annoying. Not only that, but I
keep losing a lot of work since nothing gets saved.

Regards,
Klaas


---SD 3.0
This message was automatically generated by:
  HP OpenView Service Desk Mailer 3.0
Please do not reply to this message.
```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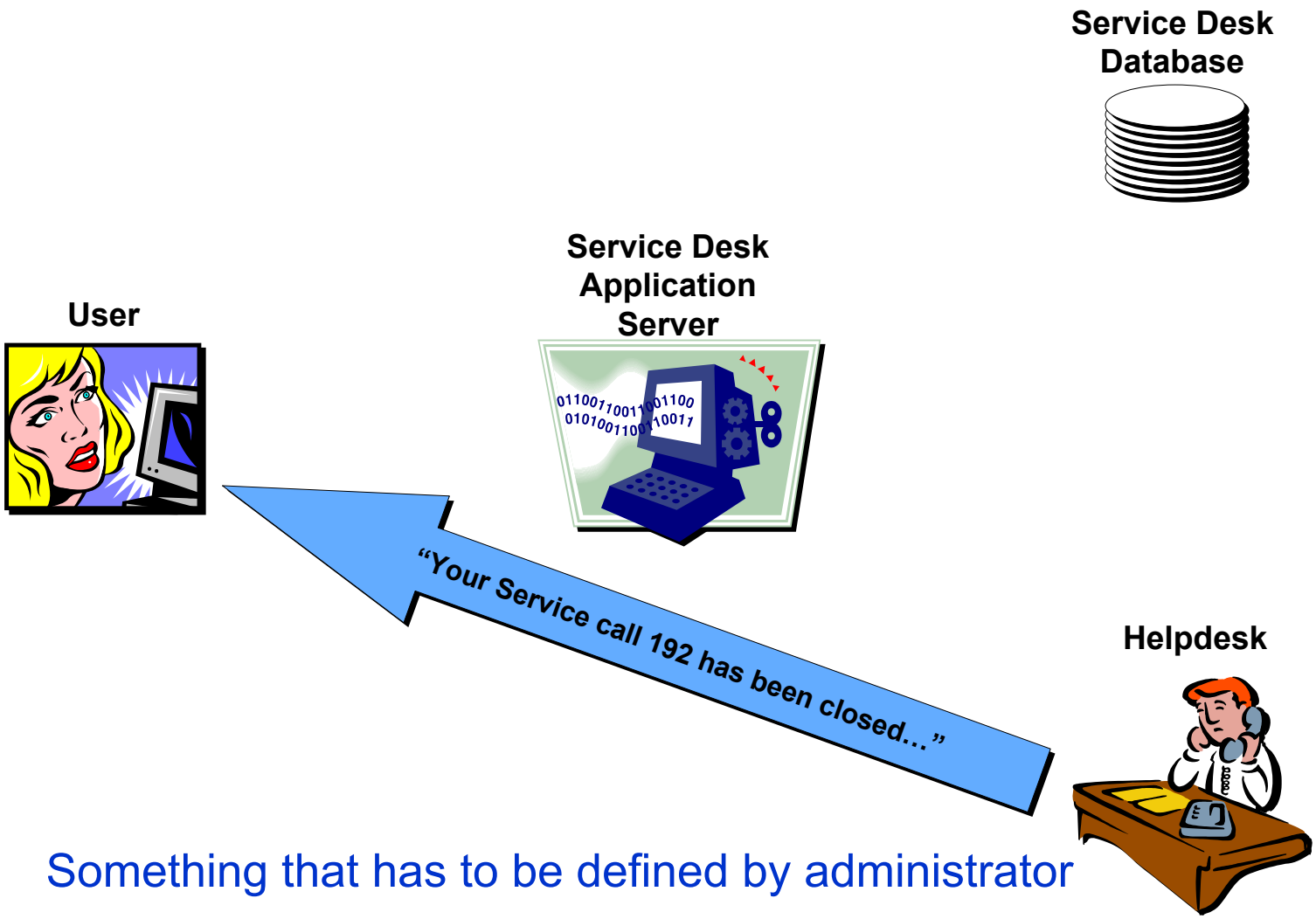
Notify User of Solution by Email (Database Rule)



Something that has to be defined by administrator

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Database Rules

Definition:

- can perform any action
- on any platform
- on the basis of an add, modify or delete in the database

Requirements:

- 3rd party application must accept command line (with parameters).
- hp OpenView service desk agents must be installed.

Examples for service calls include:

- Escalation email
- Pager alert
- Update urgency…

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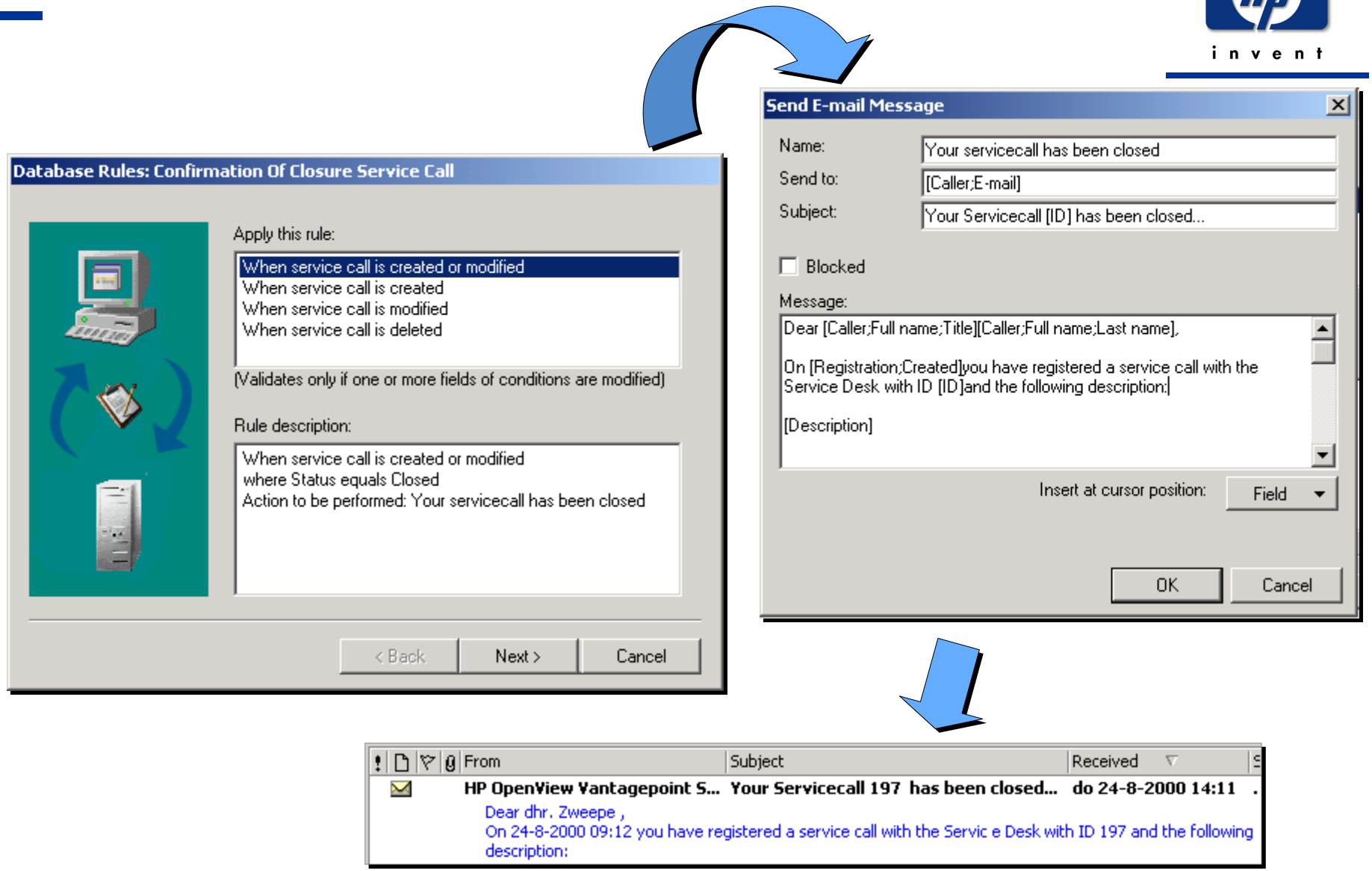
Database Rule—EXAMPLE



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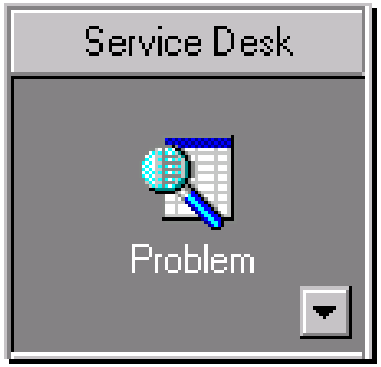
Let's:

- go see the tool…
- do some exercises…
- have a break…

Problem Management



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Objectives

- Describe the problem process and the relationship of the tool
- Explain relations with other processes

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Mission

"Aims for optimal stability of IT services by identifying root causes of incidents in order to prevent these incidents from reoccurring."

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Relationships

- Helpdesk Management
- Configuration Management
- Change Management
- Service Level Management

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Scope

Track, classify, and analyze incidents to identify problems. Analyze problems to identify root causes. Log problems and assign technical internal or external resources to address them.

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Some ITIL Definitions

Incident

- An Incident is a service disruption.

Problem

- A condition identified from multiple incidents exhibiting common symptoms, or from a single, high-impact incident, for which the cause is unknown.

Known Error

- A condition identified by successful diagnosis of the root cause of a problem.

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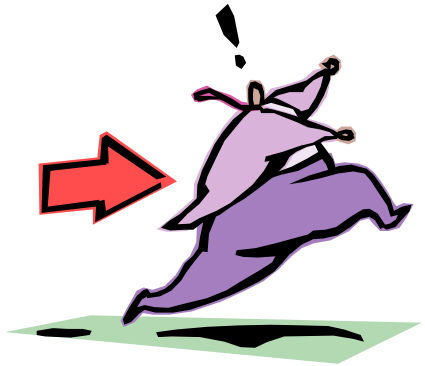
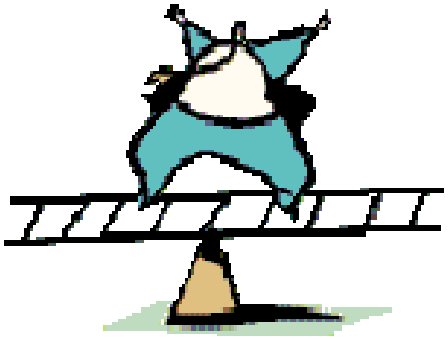
Problem versus Incident Management

How does problem management differ from incident management?

Helpdesk Management	Problem Management
Continuity - restore service	**Stability –** root cause analysis





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Activities

- Problem control (reactive and proactive)
  - Identification
  - Classification – e.g. Calamity, Proactive, Structural,…
  - Allocation - assignment
  - Investigation and diagnoses
- Error control – known error
- Management information

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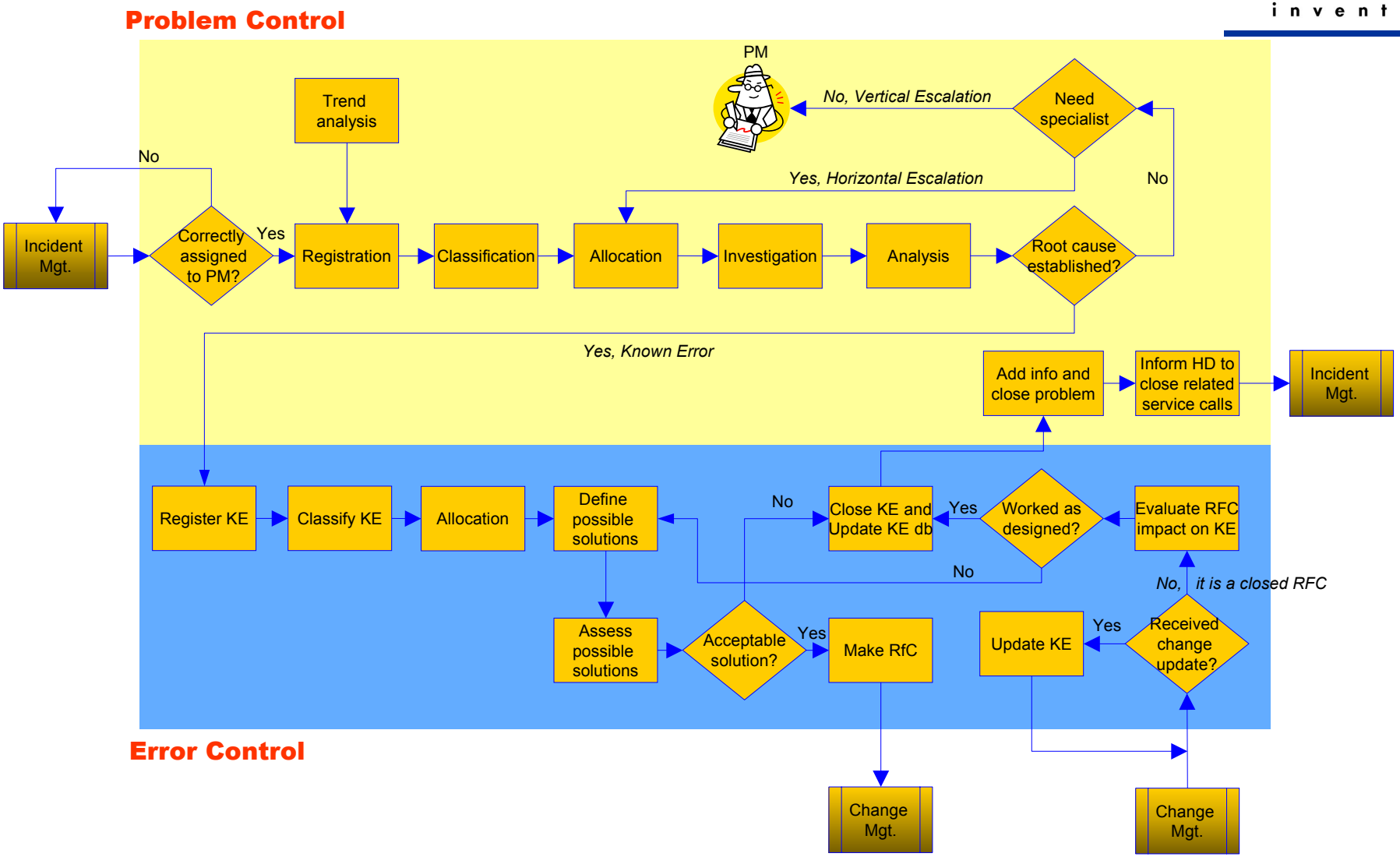
Problem Management Process Flow



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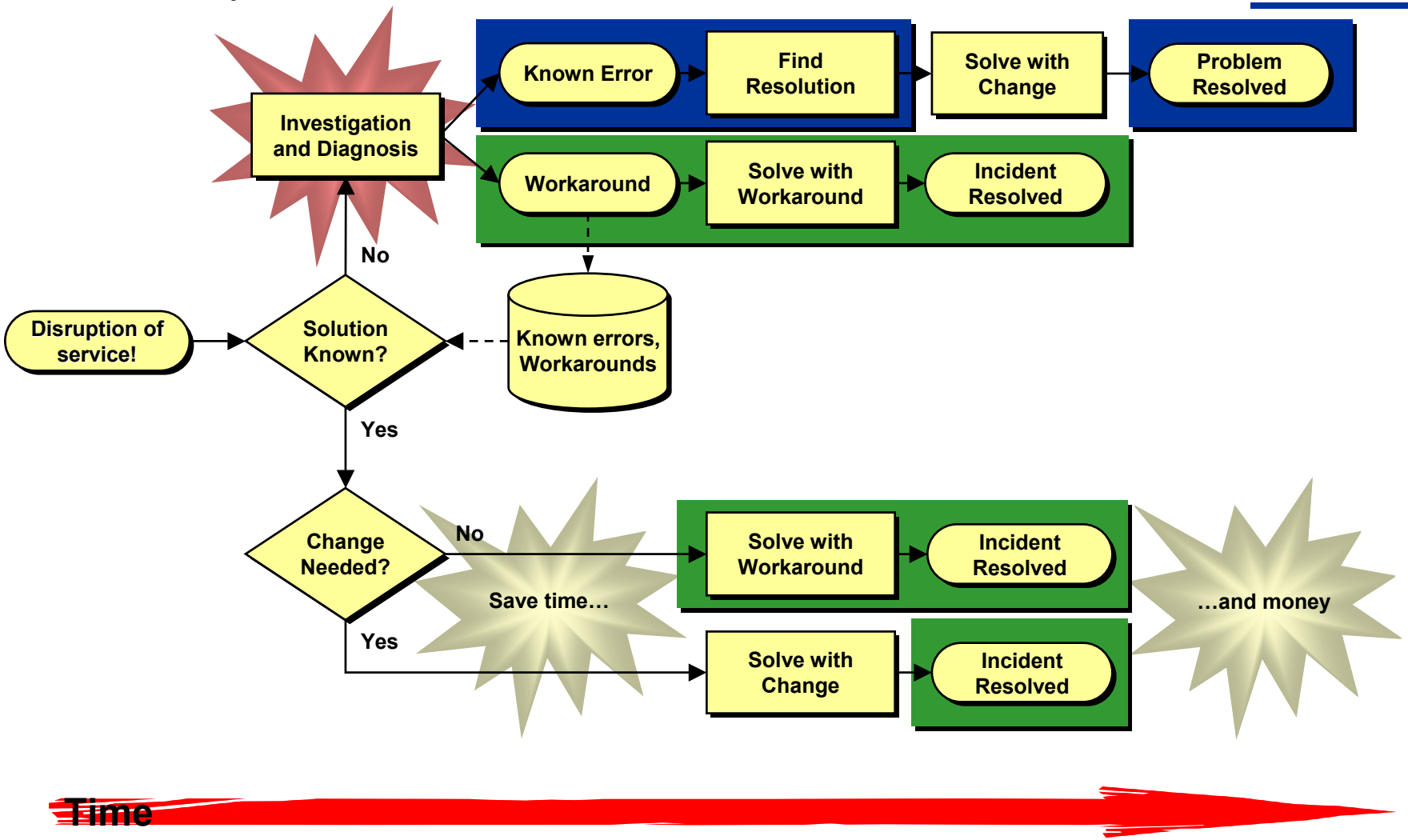
Managing Problems Saves Time and Money



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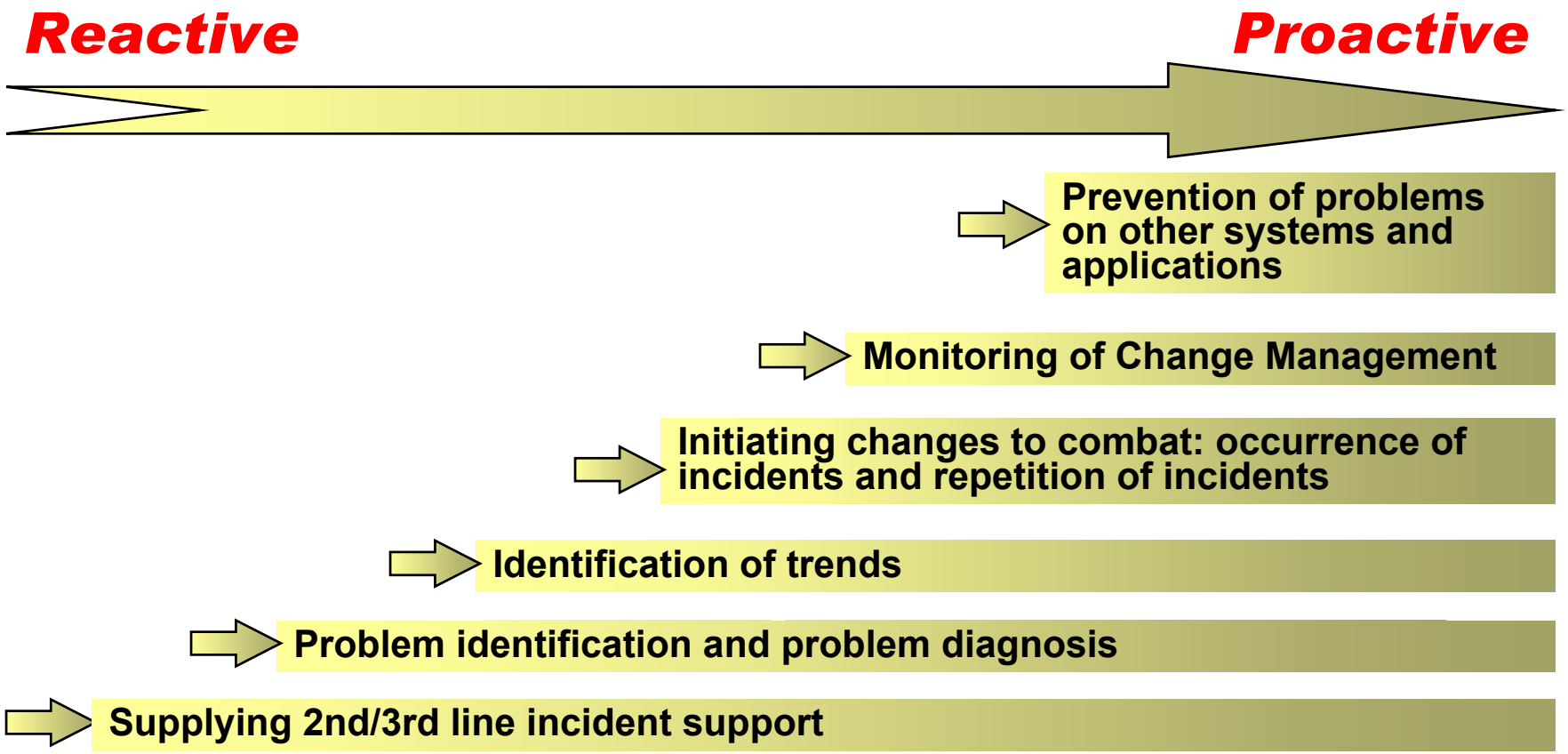
Reactive versus Proactive



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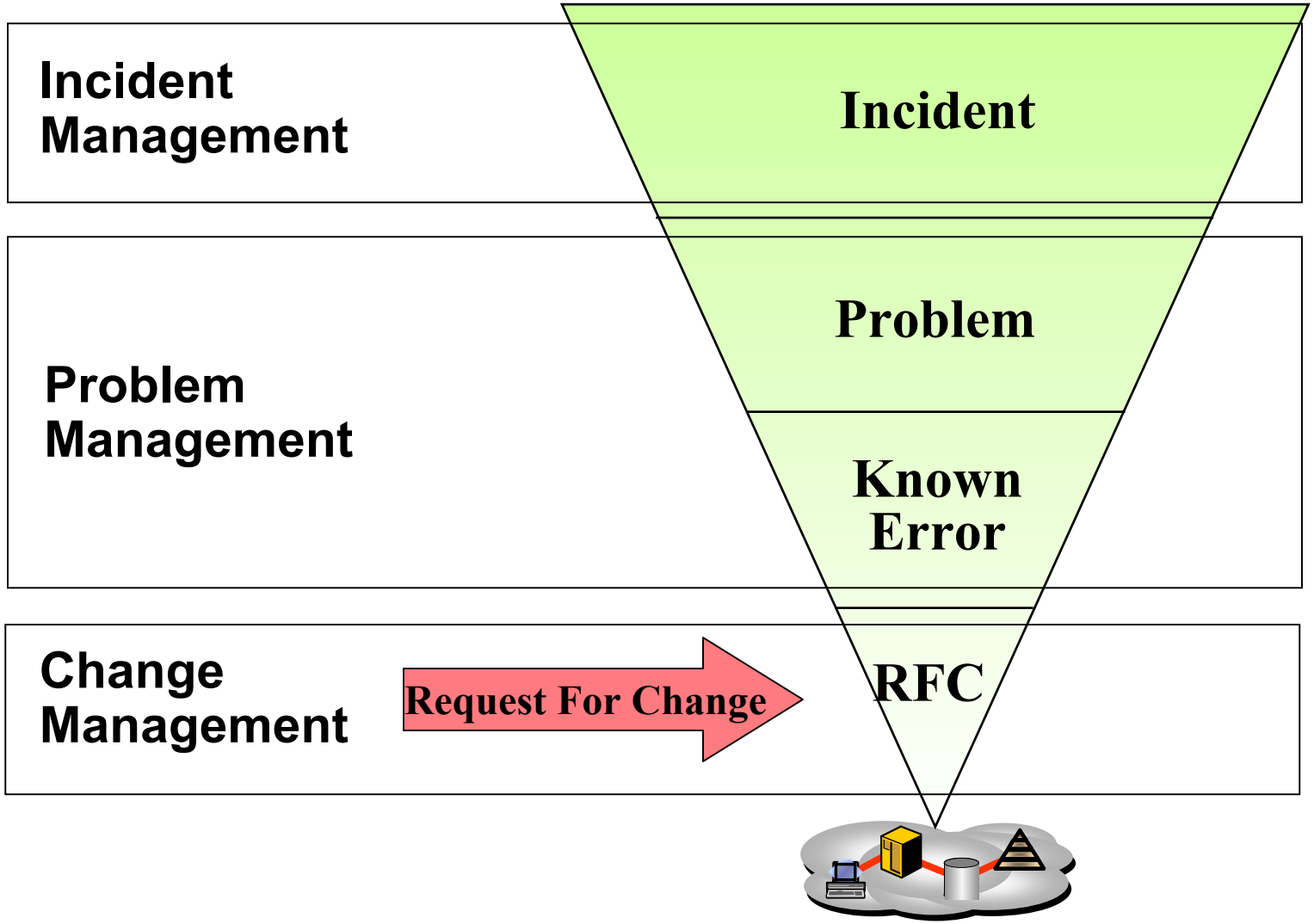
Pyramid of Change



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Key Performance Indicators

- # of problems turned into known errors
- % of registered incidents with a high business impact
- % of problems solved

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Let's:

- go see the tool…
- do some exercises…
- have a break…

Change Management
Work Order Management
Project Management
Approval Sheets

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Objectives

- Describe the change process and the relationship with the tool
- Explain the relationship between work orders and the CMDB
- Use work orders to organize change activities
- Organize changes by using the Project item
- Use Approval Sheets to authorize changes

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Mission

"To manage, control and authorize changes concerning the IT infrastructure, and to implement those changes with minimal impact on services."

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Relationships

- Helpdesk Management
- Problem Management
- Configuration Management
- Service Level Management

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Responsibilities

- Process Request for Changes (RFC)
- Logging and Prioritizing Changes
- Assessing Change impacts - benefits & risks
- Authorization of Changes
- Coordinating, Scheduling, and Tracking Changes
- Testing Change effectiveness
- Reviewing completed Changes

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Key Concepts

- Request For Change (RFC)
- Risk & Impact Analysis
- Change Advisory Board (CAB)
- Work Orders
- Project
- Process Dependencies

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Important Procedural Steps

- Filter Request
- Assign Priority & Urgency
  - Standard, Normal, & Emergency Change Processes
- CAB Approval Process
- Build Changes
- Test Approved Changes
- Back-out Changes
- Implement Changes
- Interface with CI, Incident, & Problem

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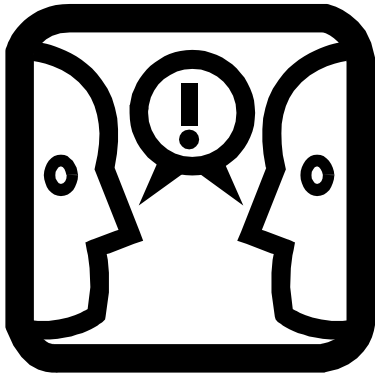
Scope

What are the different types of changes?

- How will you handle these changes?
- Who will be involved in the CAB ?
- How will you handle urgent changes?



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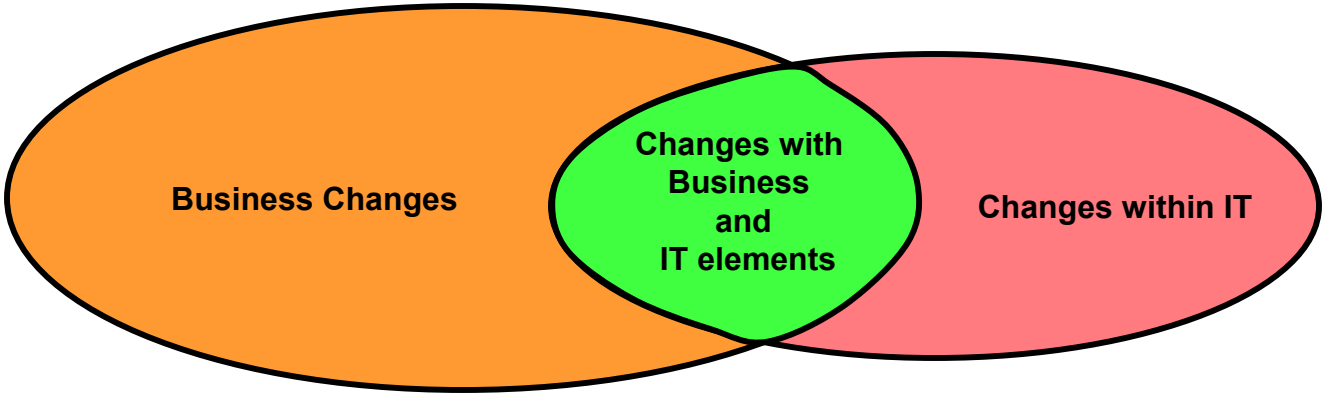
Types of Changes

- Standard changes
- “Normal” changes
- CAB changes
- Management changes



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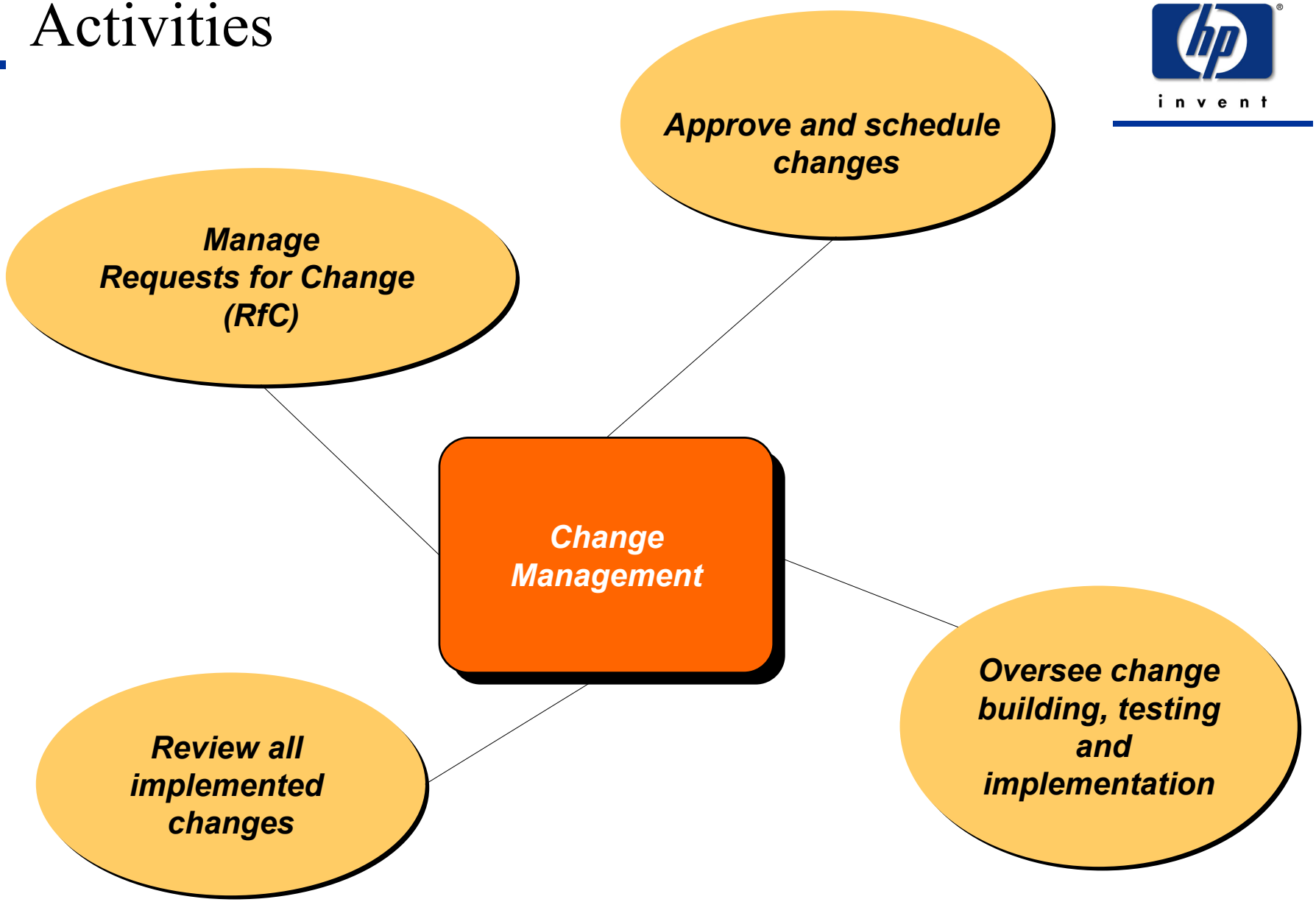
Activities



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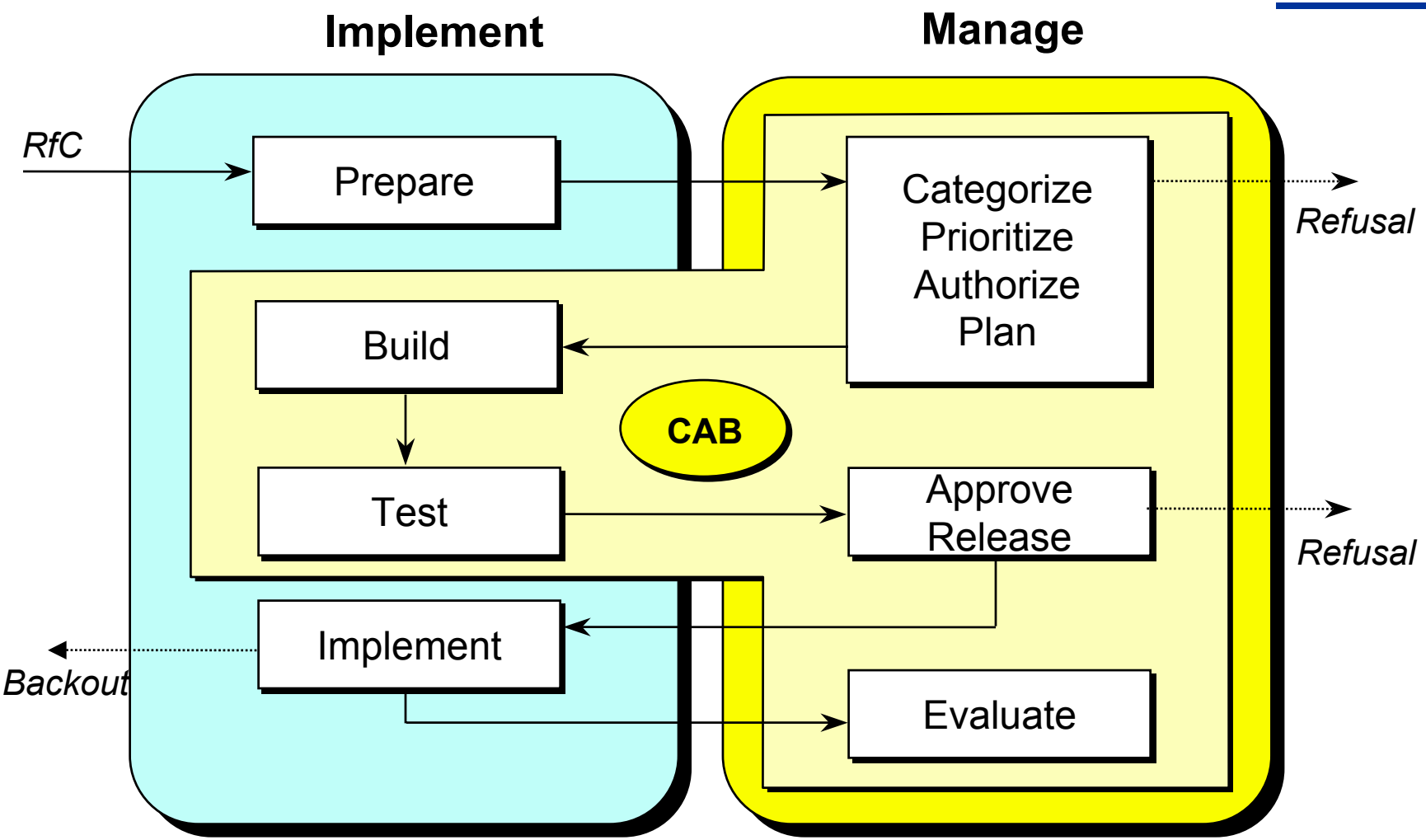
Change Management Process



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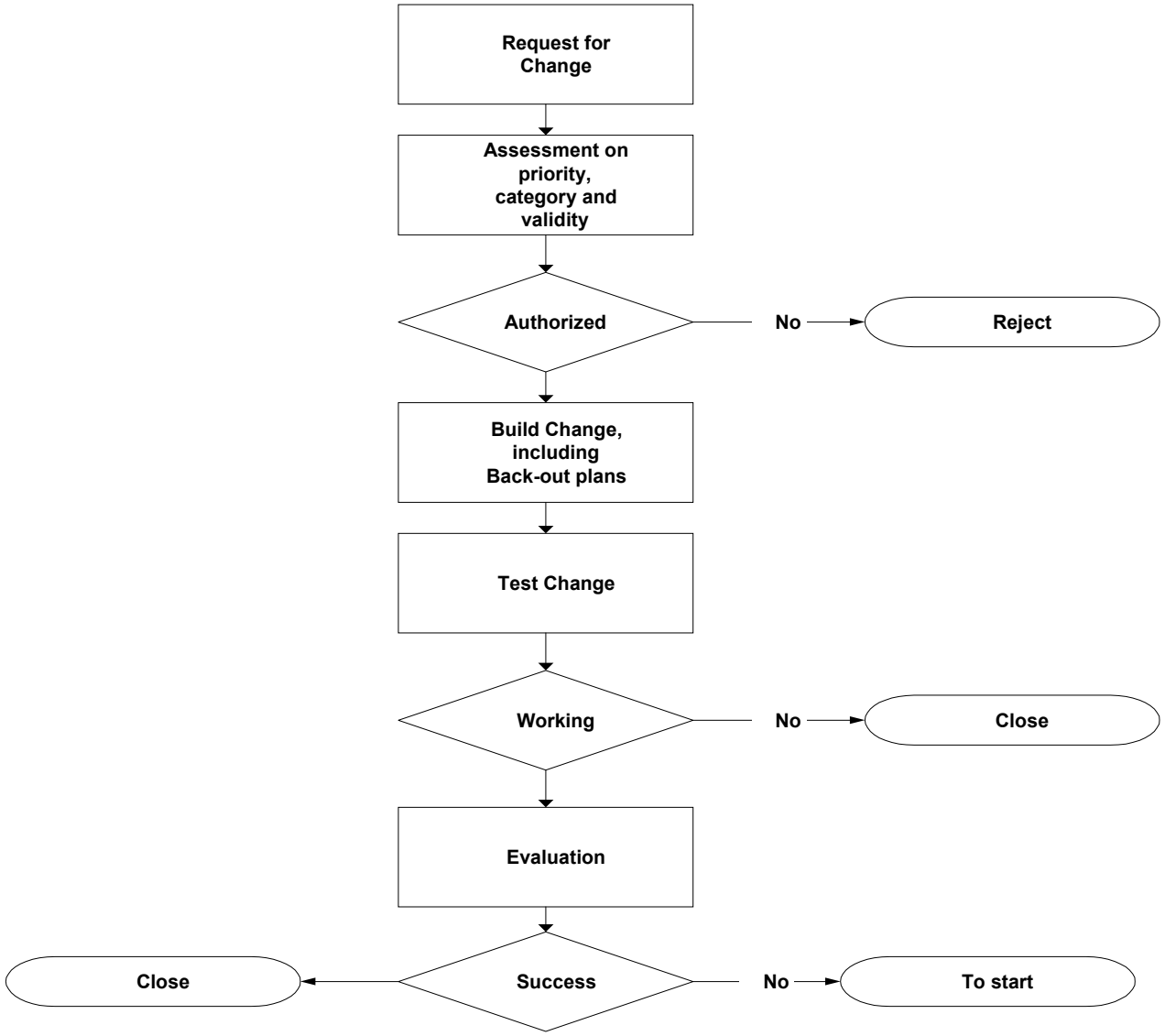
Process—Another One



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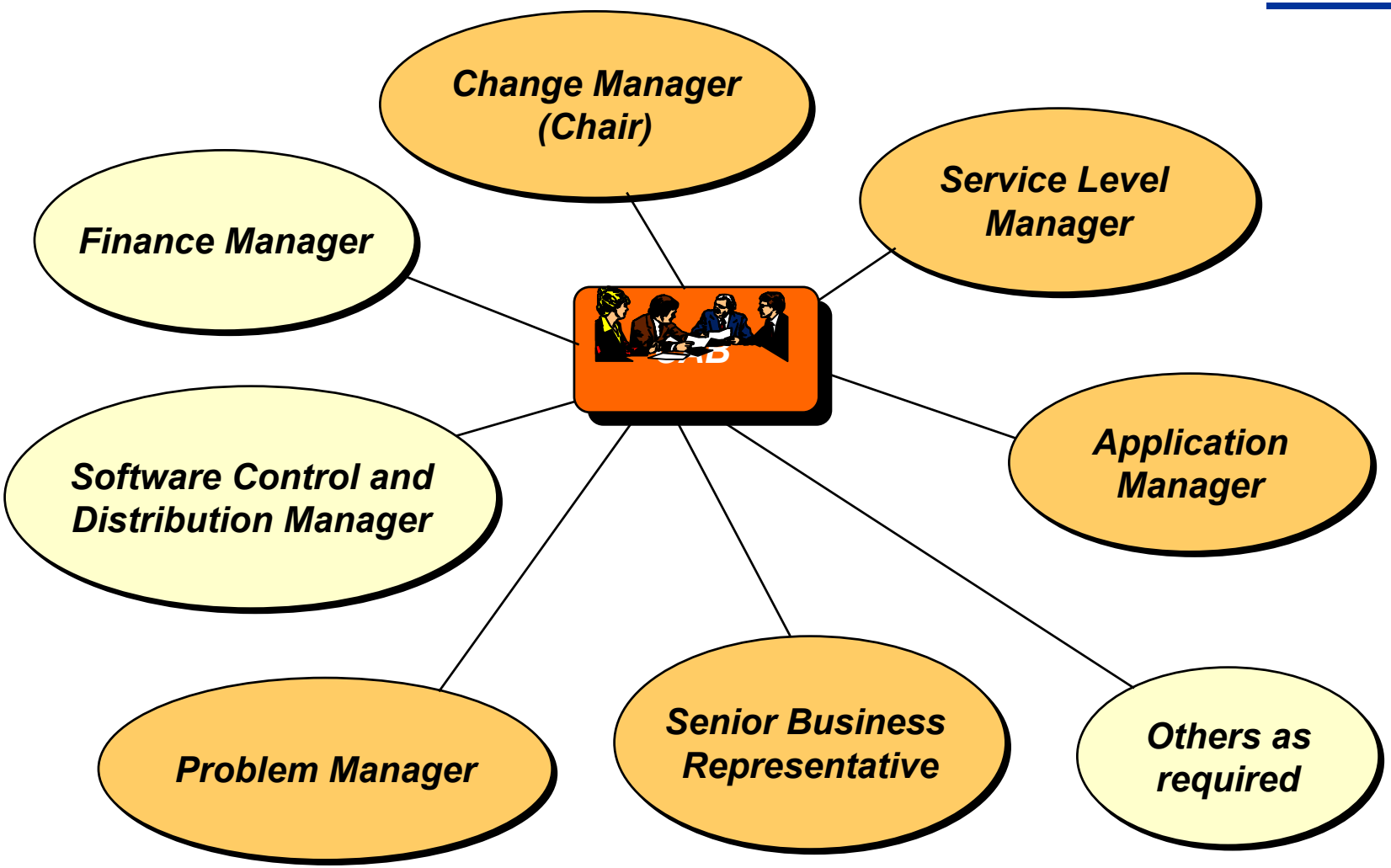
The Change Advisory Board (CAB)



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CAB Considerations

- Change Advisory Board (CAB) Set up & make
  - IT Managers, Customers, Technical & Business staff
- CAB Tasks
  - Prioritization
  - Risk & Impact Analysis
  - Authorization
  - Upon further review,…..
- Periodic meetings
- Emergency CAB

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Key Questions…

- How should RfC's be handled? - *CAB, informal, pre-approved...*
- What other records will be linked to Change records? – *Problem tickets, Incident tickets,..*
- How many groups will be using Change Manager records? What are their authorization levels?
- How will Changes be categorized? - *CAB decision, not-authorized, Ops Call,..*
- How will IT close Changes? - *implement, reject, rollback*
- What types of Changes will be tracked? - *upgrade, replace, expansion, conversion*

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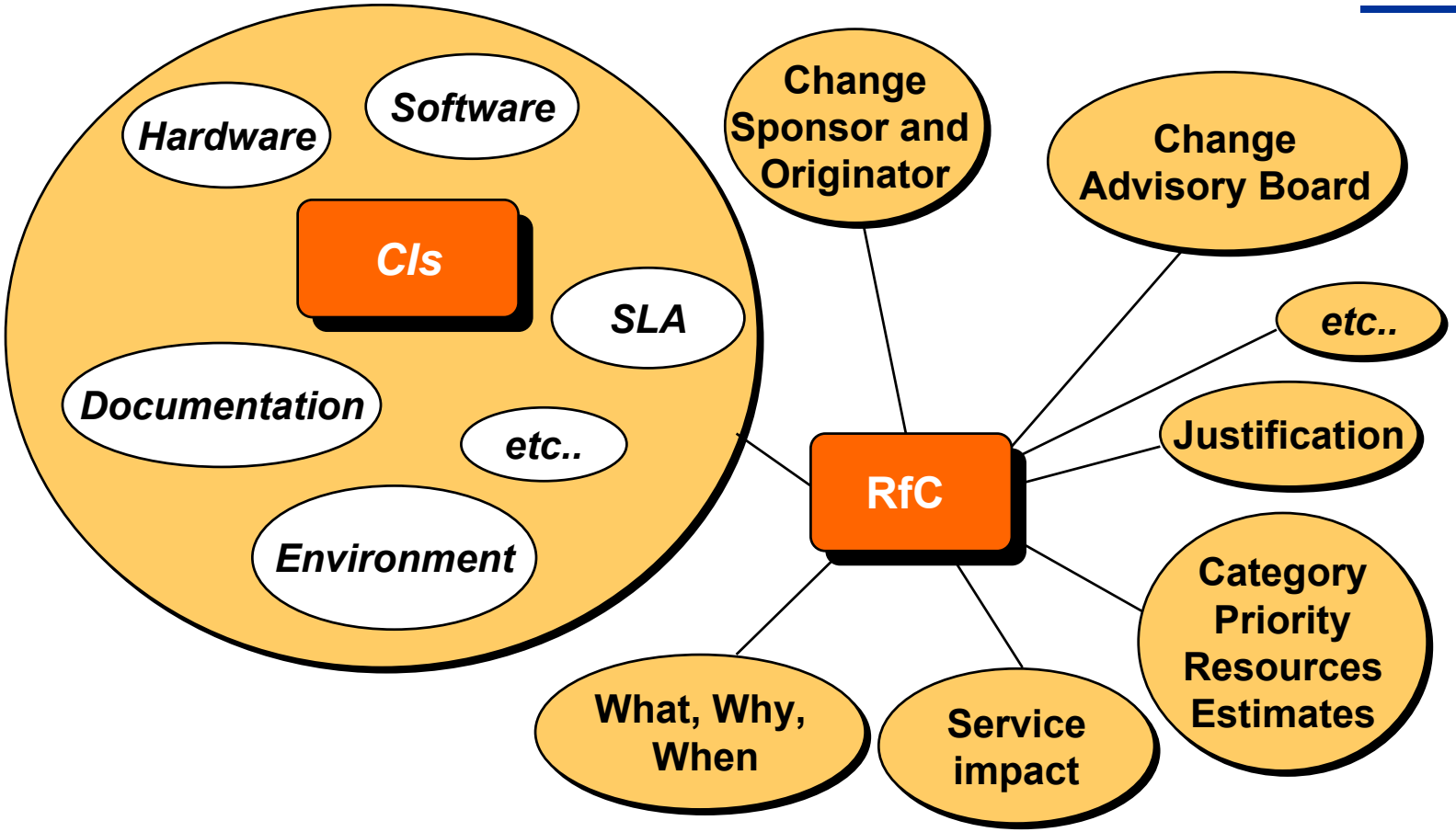
Request for Change (RfC)—Scope



RfC—a Request for Change to one or a number of configuration Items

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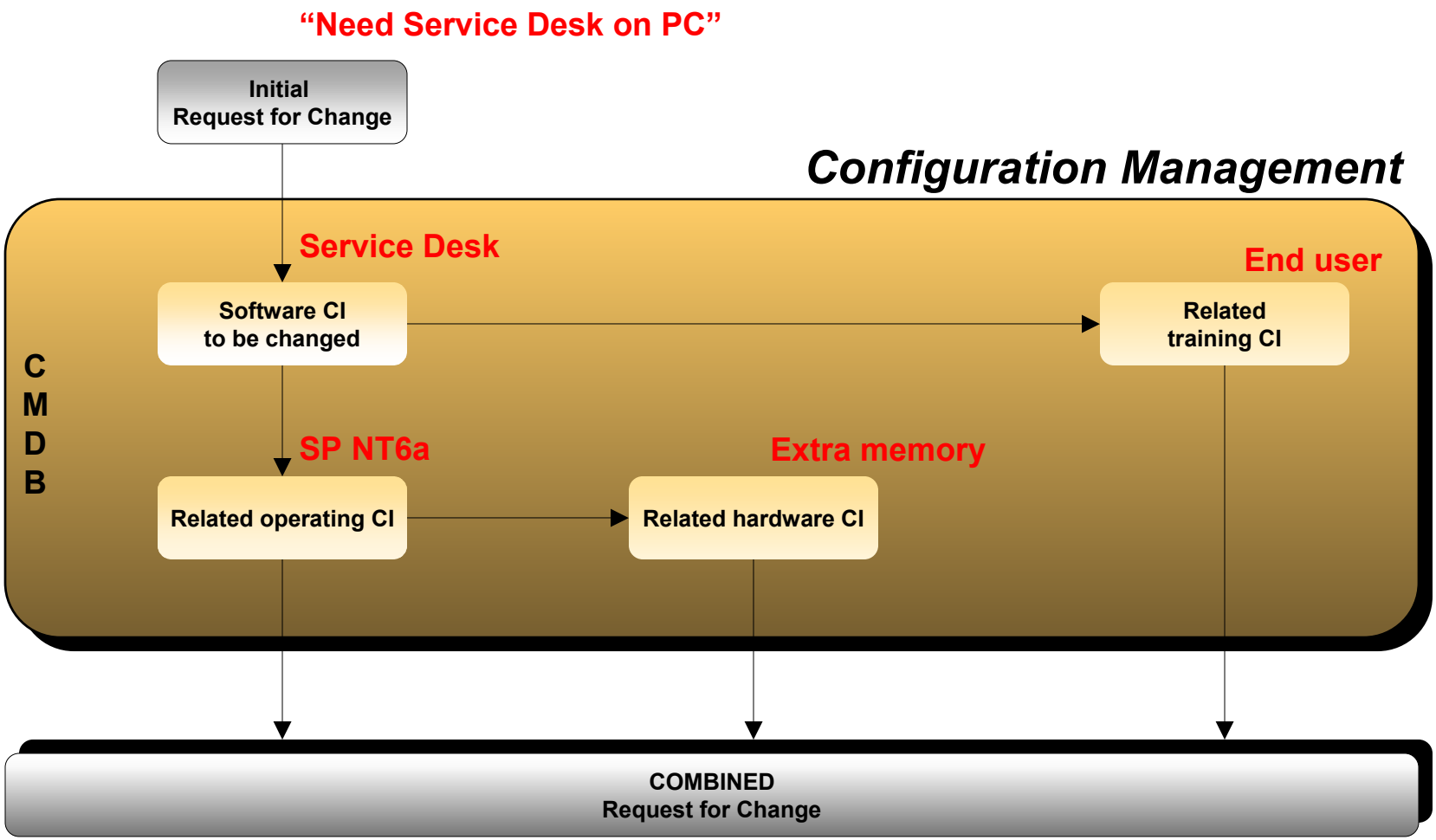
RfCs and Configuration Management



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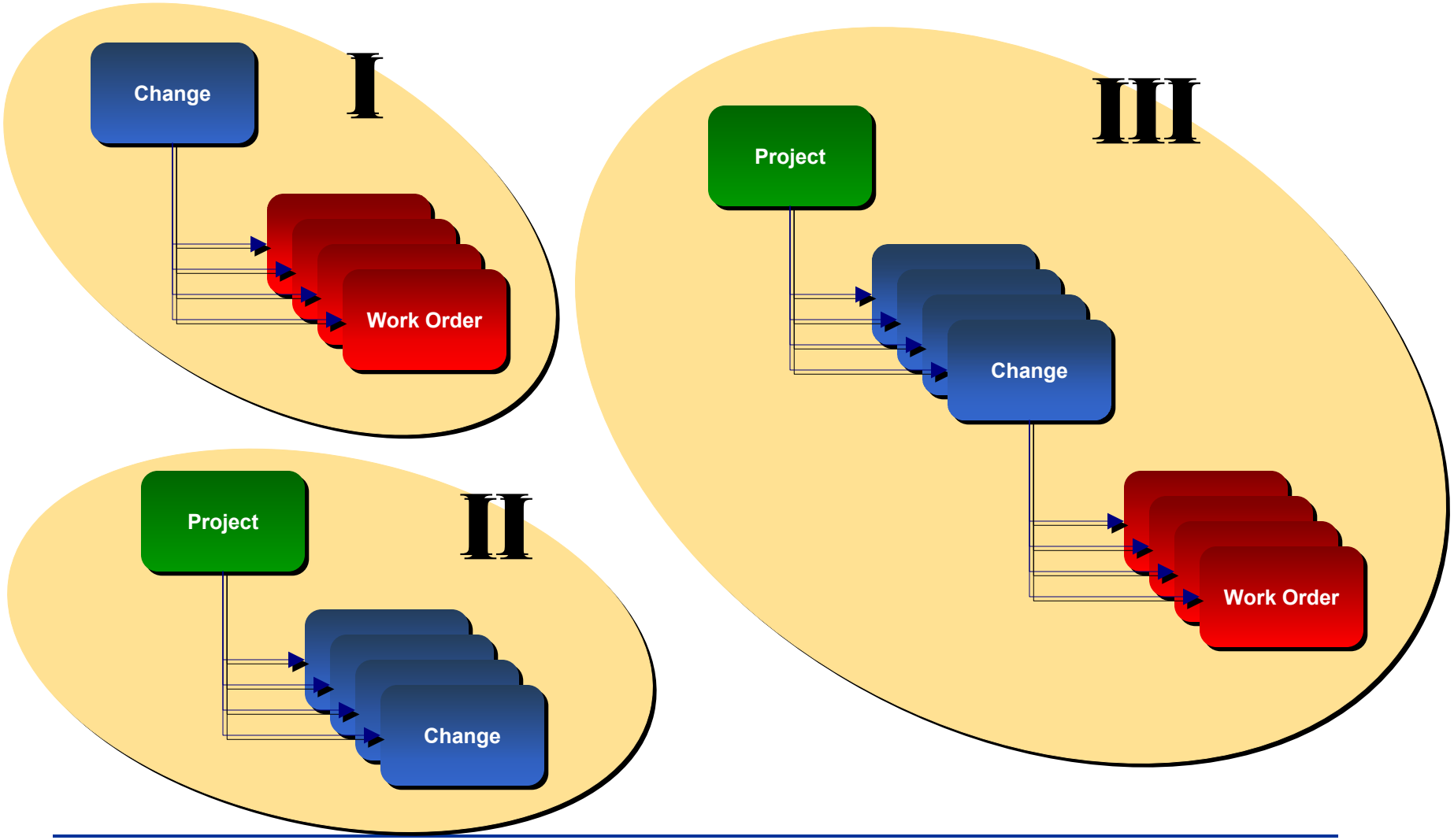
Projects, changes and workorders



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Workflow/workorder management

- Status, activities, assignment
- State determines place in lifecycle (what about status?)
- Database and UI rules can enforce workflow
- Predecessor-Successor workorders can enforce workflow
- Planning workgroups facilitates workflow

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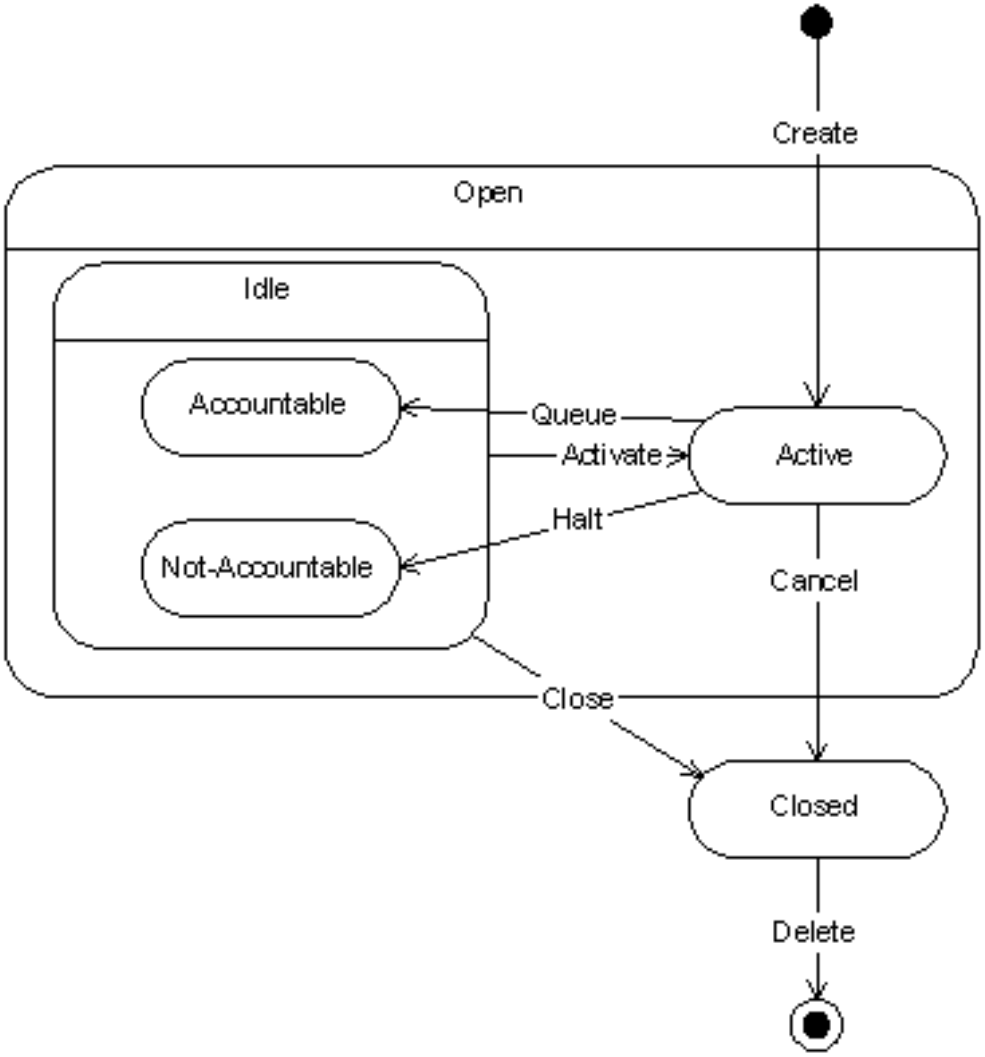
State and Status (1 of 2)



During its lifecycle an item is in a *Open* or *Closed* **state**.

When it is in an *Open* **state**, it is either *Active* or *Idle*.

When it is in an *Idle* **state**, it is either *Accountable* or *Not-Accountable*.

Item **status** is a specification of the **state** an item is in.

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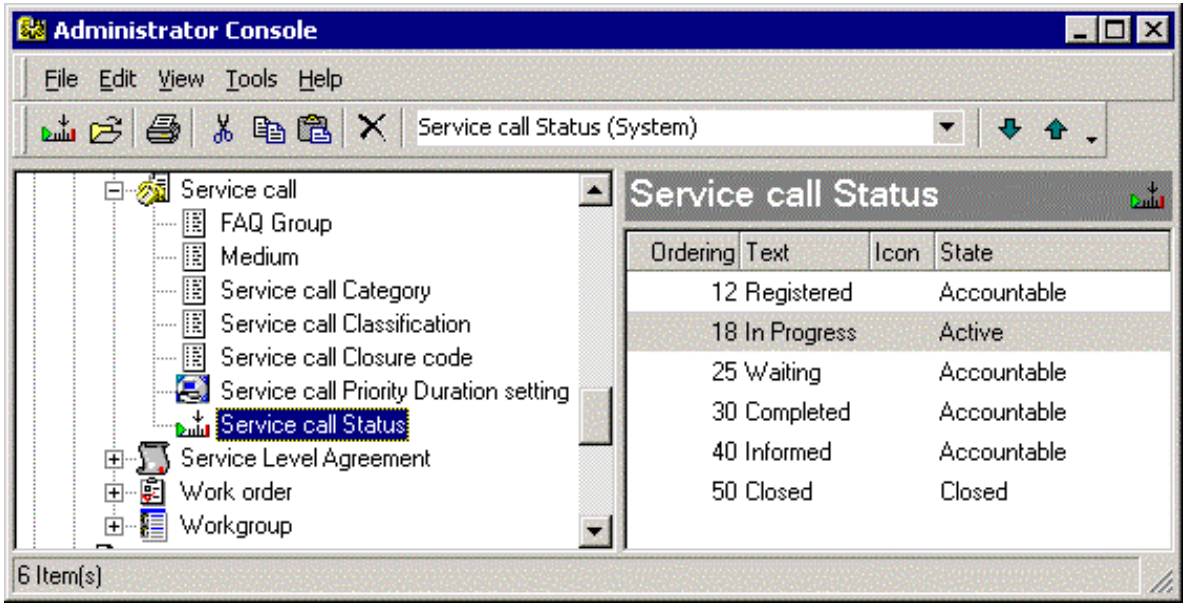
State and Status (2 of 2)



Each status has a state: *Active*, *Accountable*, *Not Accountable* and *Closed*.

***Open* and *Idle* are super states and cannot be selected.**

These states specify whether an item is Active or Closed and when Active, whether you are accountable or not.

Used for workflow management functionality and reporting.

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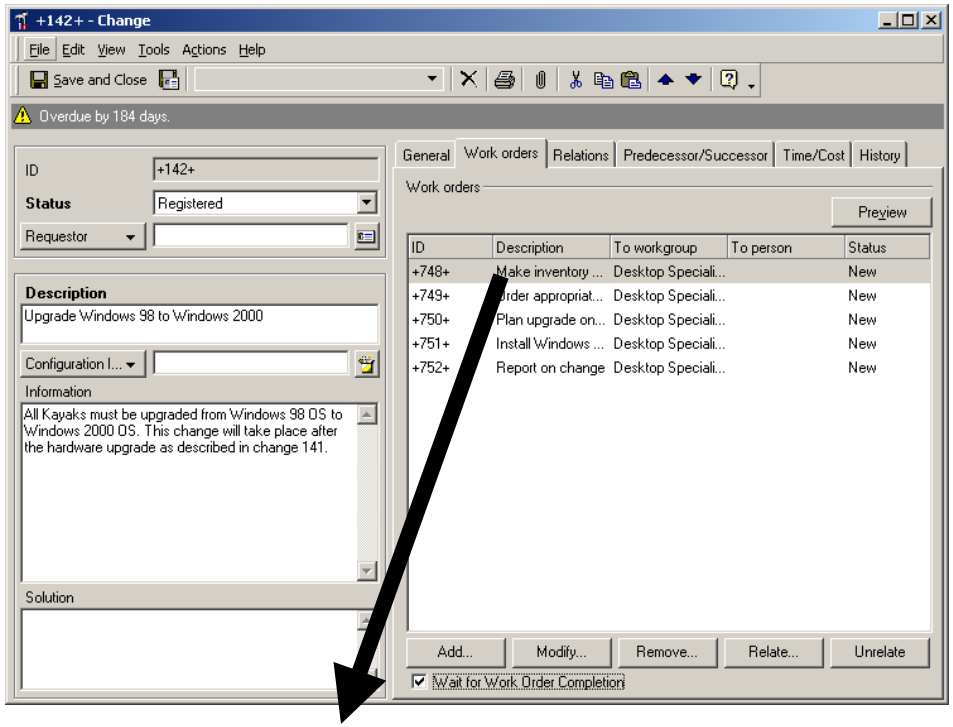
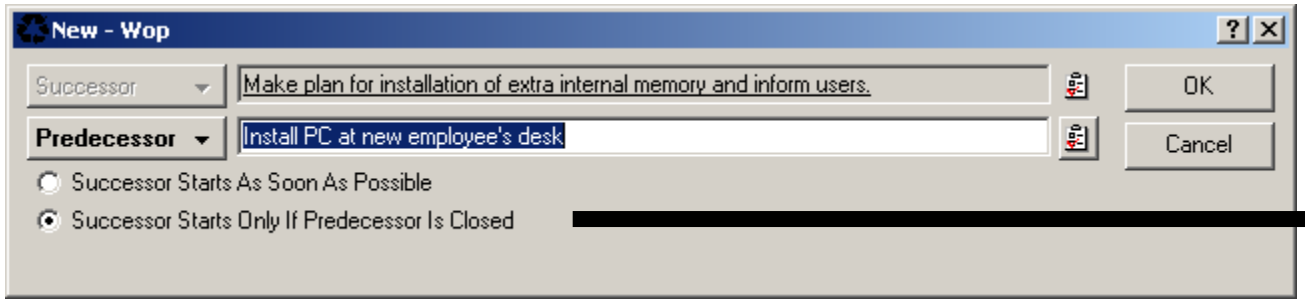
Execution order of workorders



- start succeeding workorder only when predecessor is closed
  - a workorder is closed when the *state* of the work order *status* is ‘Closed’



Only start successor when predecessor is closed

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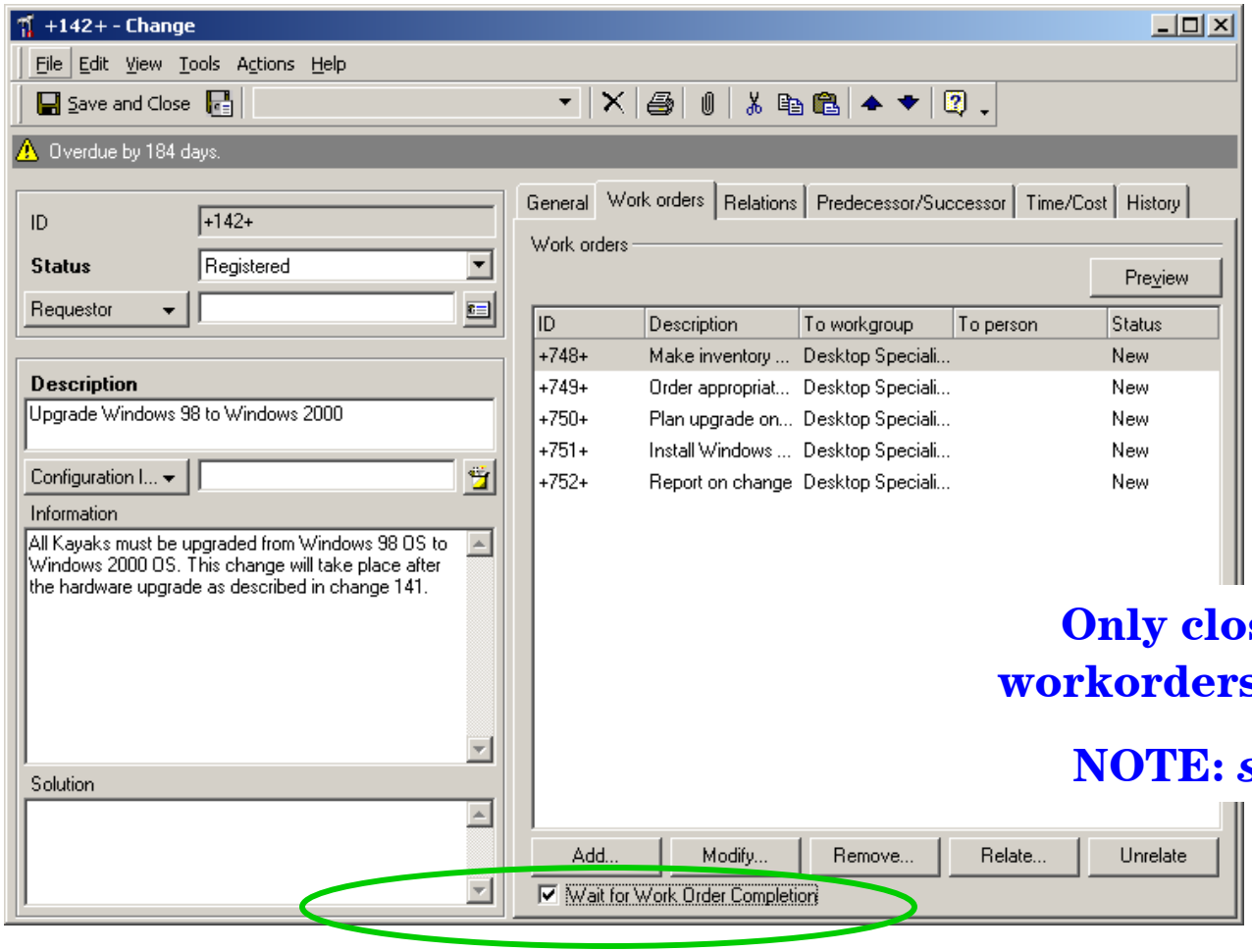
Closing items that have related workorders



Only close item when all workorders have *Closed* state

NOTE: *state* not *status*

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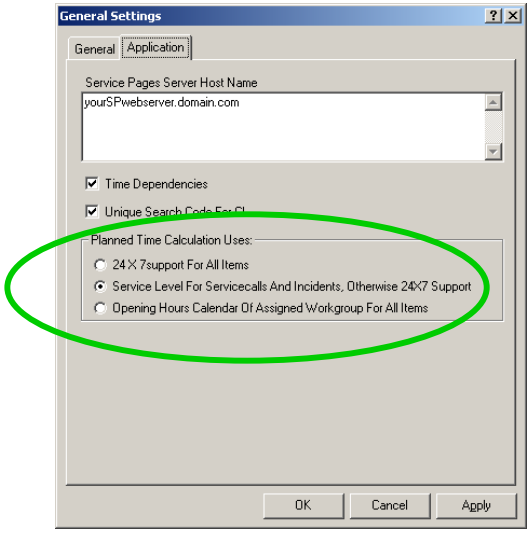
Multiple calendars for workgroups

- Each workgroup can have its own opening hours
  - 24X7, 5X8, etc.
- Each workgroup can have its own holiday calendar
- Planned time can be based on these opening hours and holiday calendar



In System Panel General Settings it is defined how planned time is calculated:

-Always 24X7

-Service Level for Service Calls and Incidents

-Workgroup schedule and calendar

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Automatic workorder replanning

- Workorders can be replanned automatically when the timing of one workorder in a series needs to be adjusted. In this case, successing workorders are replanned with new adjusted timing.
- Takes into account workgroup calendars
- Works very well with a series of sequential workorder templates related to a change template

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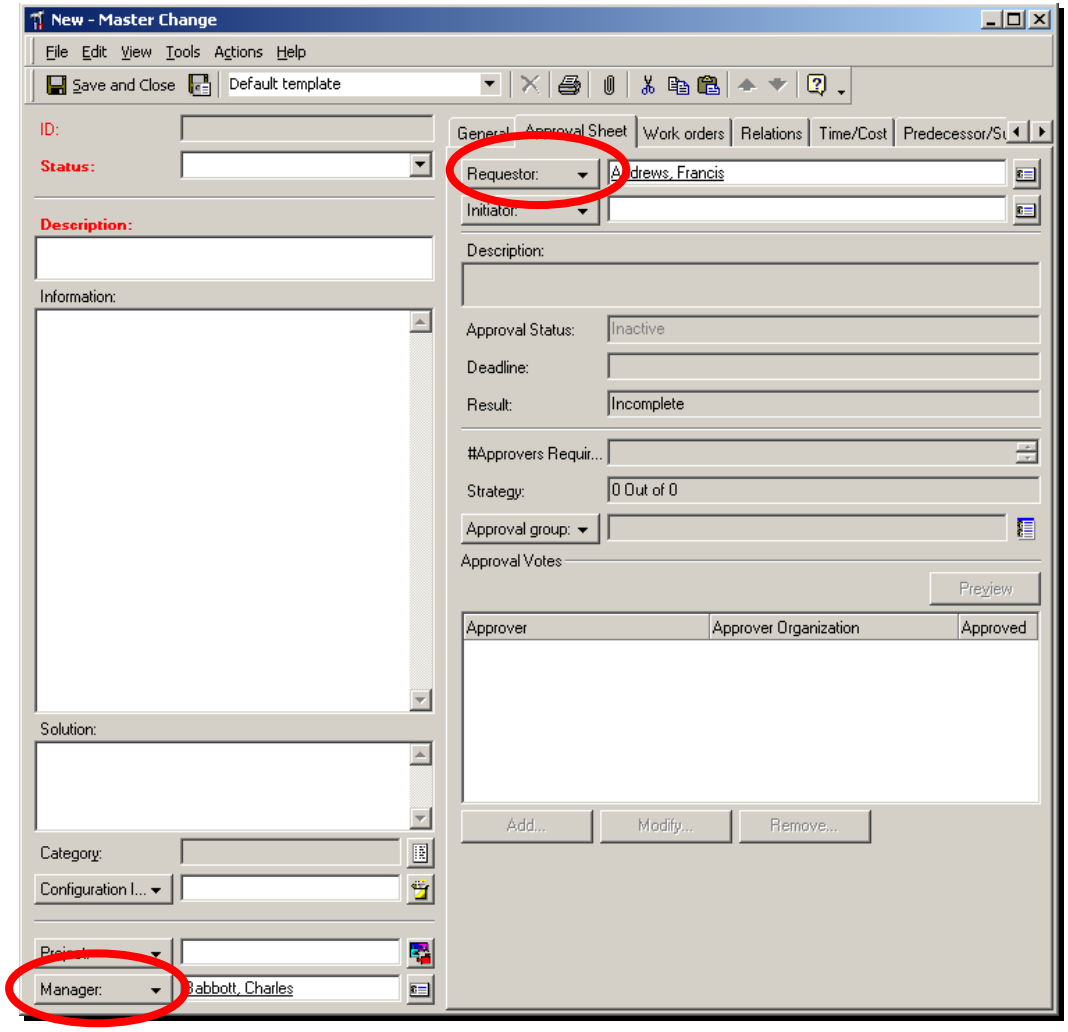
Change Manager / Requestor



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Approval Sheets

Approval sheets can be used for:

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

New - Master Change

File Edit View Tools Actions Help

Save and Close | Default template

ID:

Status: To be approved

Description:
network lan segment 02 needs faster speed to support upcoming SLAs

Information:
network LAN segment 02 is now 10mb/s and near capacity; peak usage is >95% bandwidth used now; at this rate, current SLAs at risk during peak times; no new SLAs using this CI can be handled

must increase speed of this segment to handle upcoming SLA, which will require this network link

Solution:
upgrade network NETLAN02 from 10mbs to 100 mbs

Category:

Configuration I... NETLAN02

Project:

Manager:

General | Approval Sheet | Work orders | Relations | Time/Cost | Predecessor/Su

Requestor: Andrews, Francis

Initiator: Ashfield, Jack

Description:
upgrade network from 10mb/s to 100 mb/s on NETLAN02

Approval Status: Inactive

Deadline: 11/1/2001 21:31

Result: Incomplete

#Approvers Requir... 3

Strategy: 3 Out of 5

Approval group:

Approval Votes

Preview

Approver	Approver Organization	Approved
Trout, Helen	IT Operations Department	
Ronson, Mike	IT Operations Department	
Johnson, Martin	IT Service Management Dept.	
User, System	IT Operations Department	
Sally Copeland	E-Go Trading Inc.	

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

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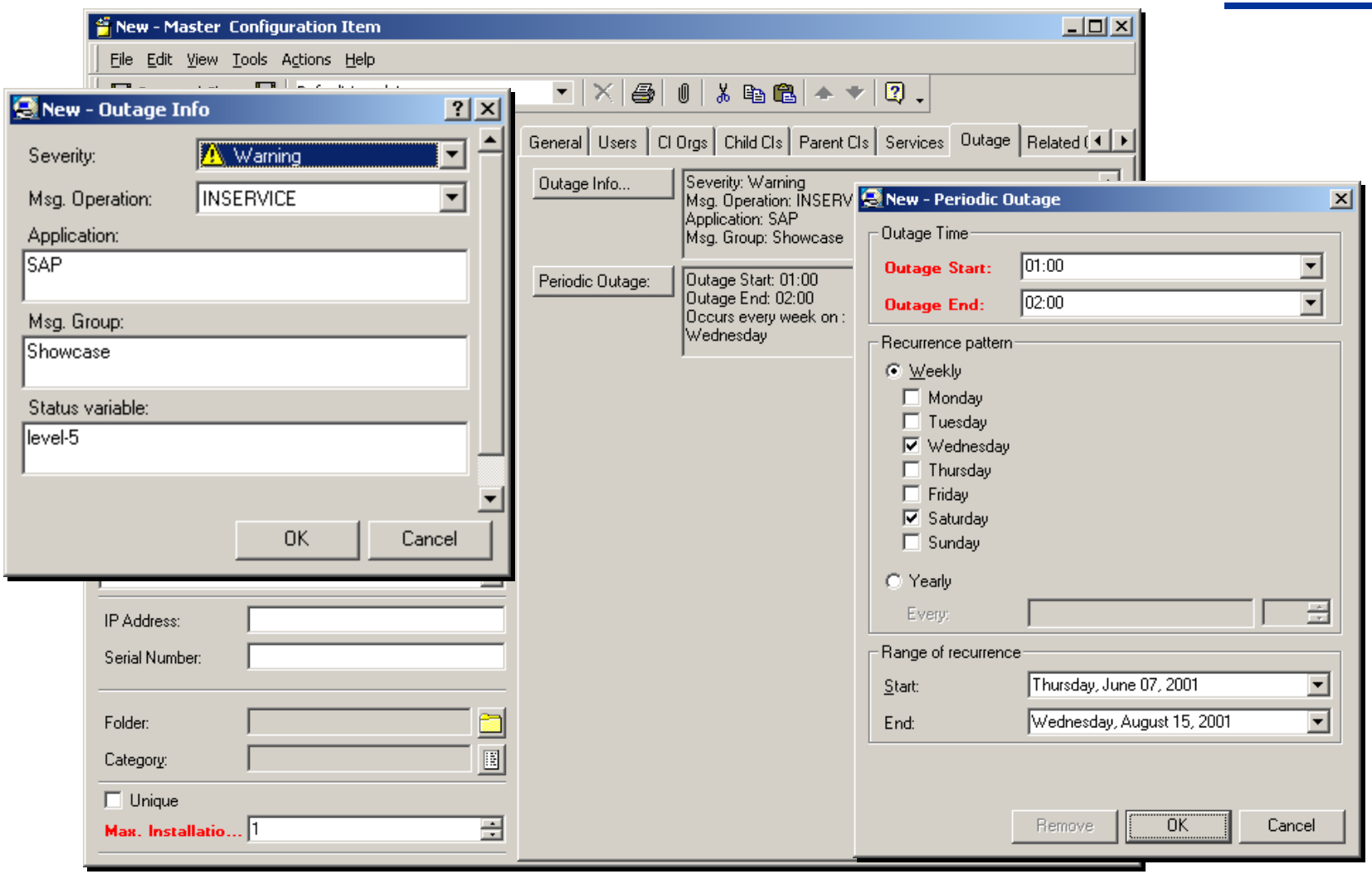
Outage: planning



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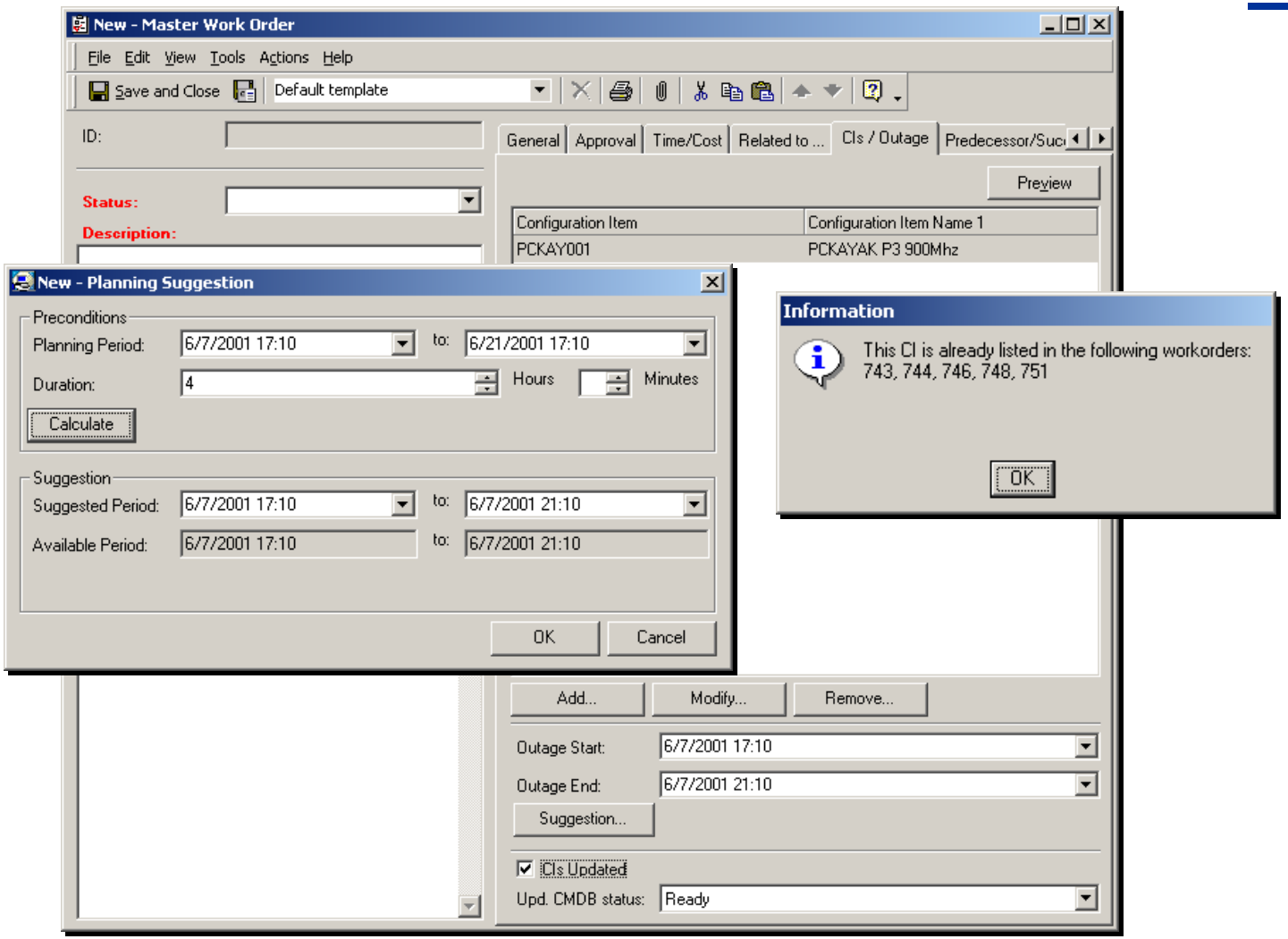
Outage: window of opportunity



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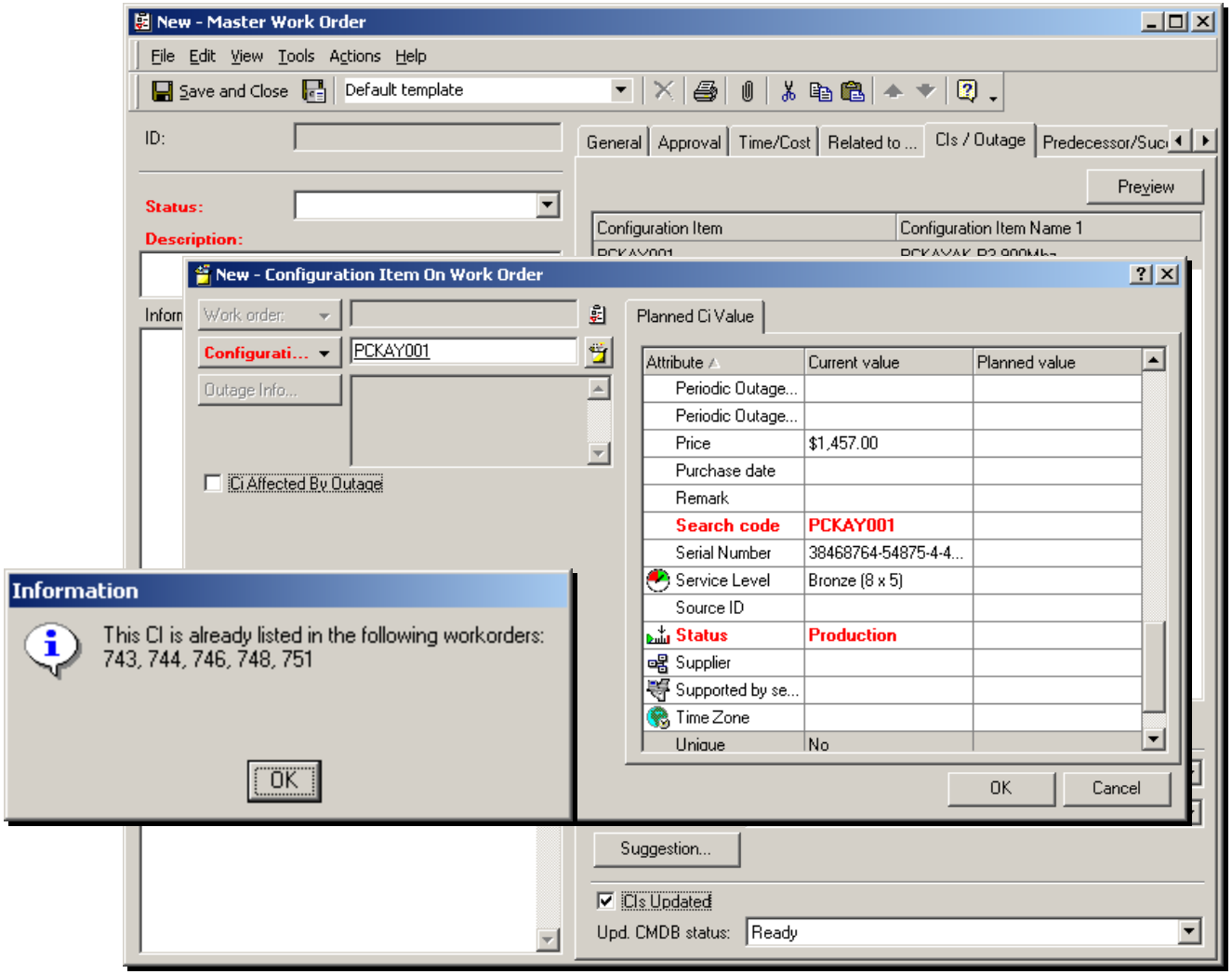
CMDB update / CI check



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Link Change records with….

- Service Call, Incidents, Problems

132 - Master Change

File Edit View Tools Actions Help

Save and Close | Default template

ID: 132

Status: Registered

Requestor:

Description:
Add Option for invoicing individual clients on adhoc basis

Information:
desired: Functionality to select a single customer and create a specific invoice for him/her
Currently this program only has the option to execute batch processing of invoice

Solution:
Option is approved and planned for next version.

Configuration I... APSERVICEDESK

Project:

Manager:

General | Approval Sheet | Work Orders | Relations | Time/Cost | Predecessor/Successor | History

Impact:

Priority:

Deadline:

Actual Finish:

Category: Unplanned

Classification:

Closure code:

Category (Service ... Unplanned

Status (Service To... Registered

Assignment...

Folder:

New - Service Event Relation

Relation type: Caused by

OK

Cancel

Service call:

Incident:

Problem:

Change: Add Option for invoicing individ

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Key Performance Indicators

- % of changes implemented on-schedule
- % of changes that are backed-out
- # of incidents caused by implementing changes
- total # of changes requested, planned, approved/rejected, completed
- total # of emergency changes
- total # of changes implemented by workgroup
- total # of changes requested by initiator

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Let's:

- go see the tool…
- do some exercises…
- have a break…

Service Level Management

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Objectives

- Describe the SLM process and the relationship with the tool
- Detail SLAs and related concepts
- Explain the special relationship of SLM with the item Service Call and Incident
- Demonstrate what information belongs in which screen
- Fill in specific data in appropriate screens

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Mission

"To design, plan, and monitor IT services, based on business needs."

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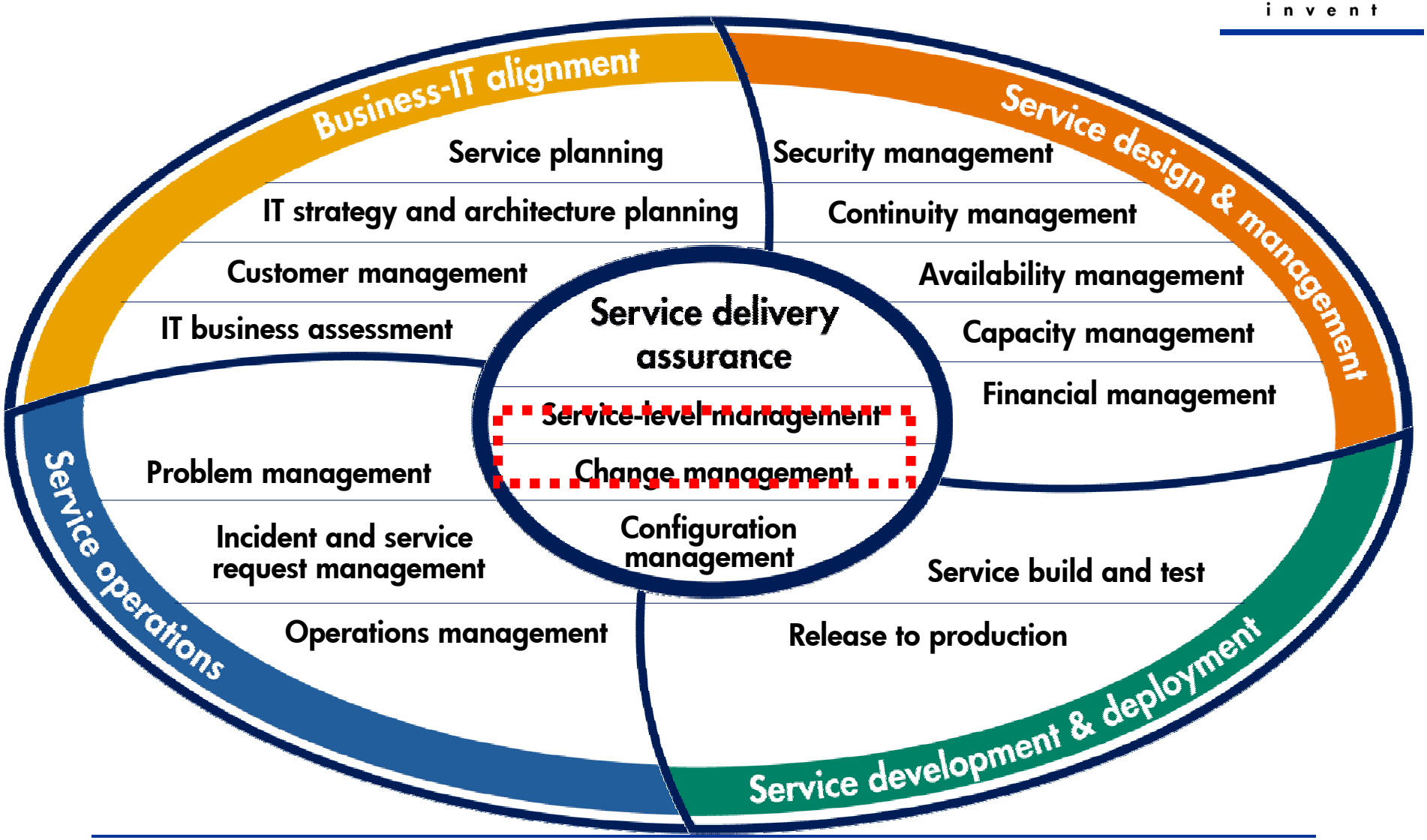
The HP IT Service Management Reference Model



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Relationships: SLM and Business

- Services represent lifeline for many businesses
- Managing these services is critical for business survival
- Direct correlation between IT Services and Business finally established
- POOR SERVICES = REVENUE LOSS = “OUT OF BUSINESS”

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SLM Definition

- SLM is a process that manages & improves agreed upon levels of services between provider and receiver
  - This process encourages:
    - Customers to consider, document, define their issues
    - Provider to be more accountable for their services' delivery
- Constant cycle of agreeing, monitoring, reporting, and reviewing service levels

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Why SLM?

- SLM ensures that:
  - Services and their levels are crafted and agreed upon by all parties
  - Service levels and targets are documented
  - Accurate monitoring of services is enabled
  - Proper reporting is generated and distributed
  - Coordination with third-party suppliers happens
  - Periodic SLA reviews occurs
  - A live “Services Catalogue” is generated and maintained
  - Service levels are met in a cost effective manner

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Key Definitions

- Service Level Agreements (SLA)
  - Documents service targets: availability, reliability, performance,…. Contract between Customer and Service Provider
- Operational Level Agreements (OLA)
  - Also know as “back-to-back” agreements
  - Between Service Desk and back-end support Groups
  - Internal to the Company (internal SLAs!)
- Underpinning Contracts (UPC)
  - Contractual agreement between Company’s and vendors who help them complete the services chain
  - Focus on maintenance and support issues

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Relationships

- Helpdesk Management!
- Change Management
- Configuration Management
- Cost Management

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Scope

- Focus on business services
- Supply agreed service levels between organization and users

  The costs of supplying and receiving the IT services are justifiable for both provider and customer

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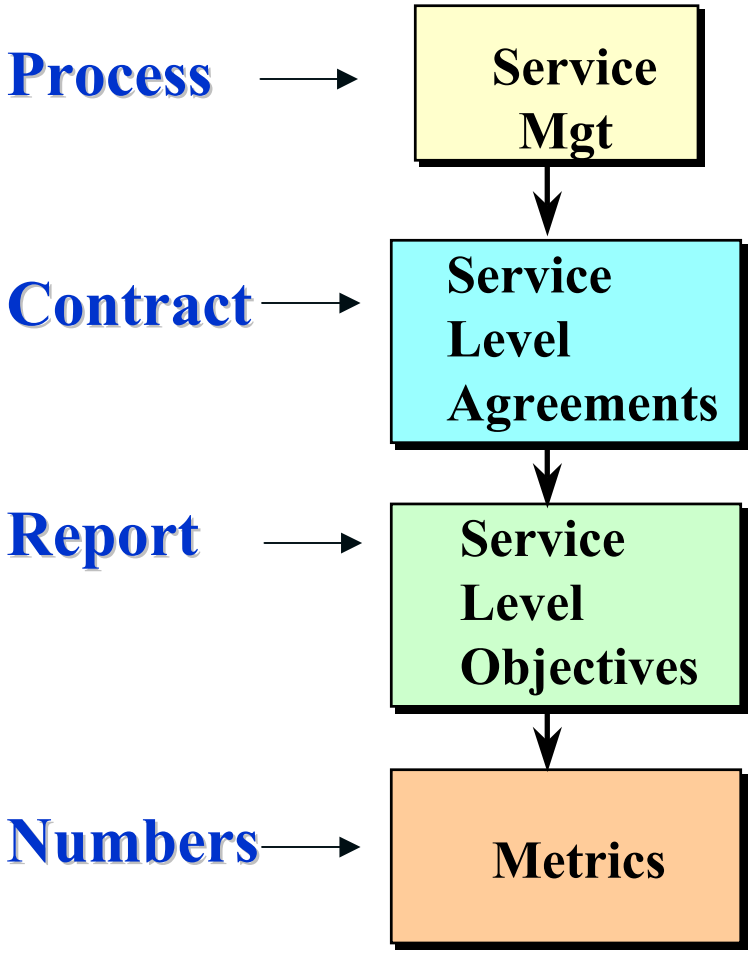
SLM: Process to Metrics



- Strategy of Defining & Maintaining Required Levels Service
- Aligns Business with IT
- Benefits: Higher ROI, Lower IT Expenditure
- About: Setting and Meeting Expectations

- Contract between Service Provider and Receiver
- Details Service Levels (QOS)
- Benefits: Groundwork for Budget control
- About: Contractual commitment & Customer Satisfaction

- Derived from SLAs
- Ex: Availability, Performance, Delay, Accuracy, ….
- Benefits: Basis for actual metric collection
- About: Crafting appropriate Reports

- Foundation for SLM
- Ex: Mibs, Incident Ticket outputs, Customer Surveys,…
- About: Bottom Line raw numbers

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Key Metrics - *Examples*

- Service Providers (ISP, Internal Service Desk, etc.)
  - MTTRS (Mean-Time to Restore Service: 1hr, 4 hrs…)
  - Availability (.9995, .995: Convert to downtime in minutes)
  - Performance (Speed)
- Providers to SPs (Telcos, ISPs, Vendors, etc.)
  - Load Balancing Guarantees
  - Performance : Response times
  - Circuit Availability
  - MTTRS
- ASP
  - Apps Response times
  - Apps Availability

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SLM – Activities (1 of 2)

- Define Services to be Provided
- Determine Acceptable Service Levels with Customers
  - Negotiate Service Level Objectives (SLO)
  - SLO is a measurable Unit
- Negotiation Phase: QOS & Cost

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SLM – Activities (2 of 2)

- Generate SLA *(details to follow…)*
- Measurement of SLO
- Reporting Back to Customer
- Evaluate SLA Performance with Customer
- Refine and adjust QOS and SLA as Needed

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SLA Components

- Steps to Writing Successful SLA
  - Project Background
  - Parties to Agreement
  - Service Details
  - Volume of Service to be Provided
  - Timeliness of Service (Service Levels)
  - Availability of Service
  - Responsiveness
  - Limitations of Service
  - Penalties and Service Compensation
  - Measurement of Service
  - Cost and Charges
  - Re-negotiations and Review Frequency

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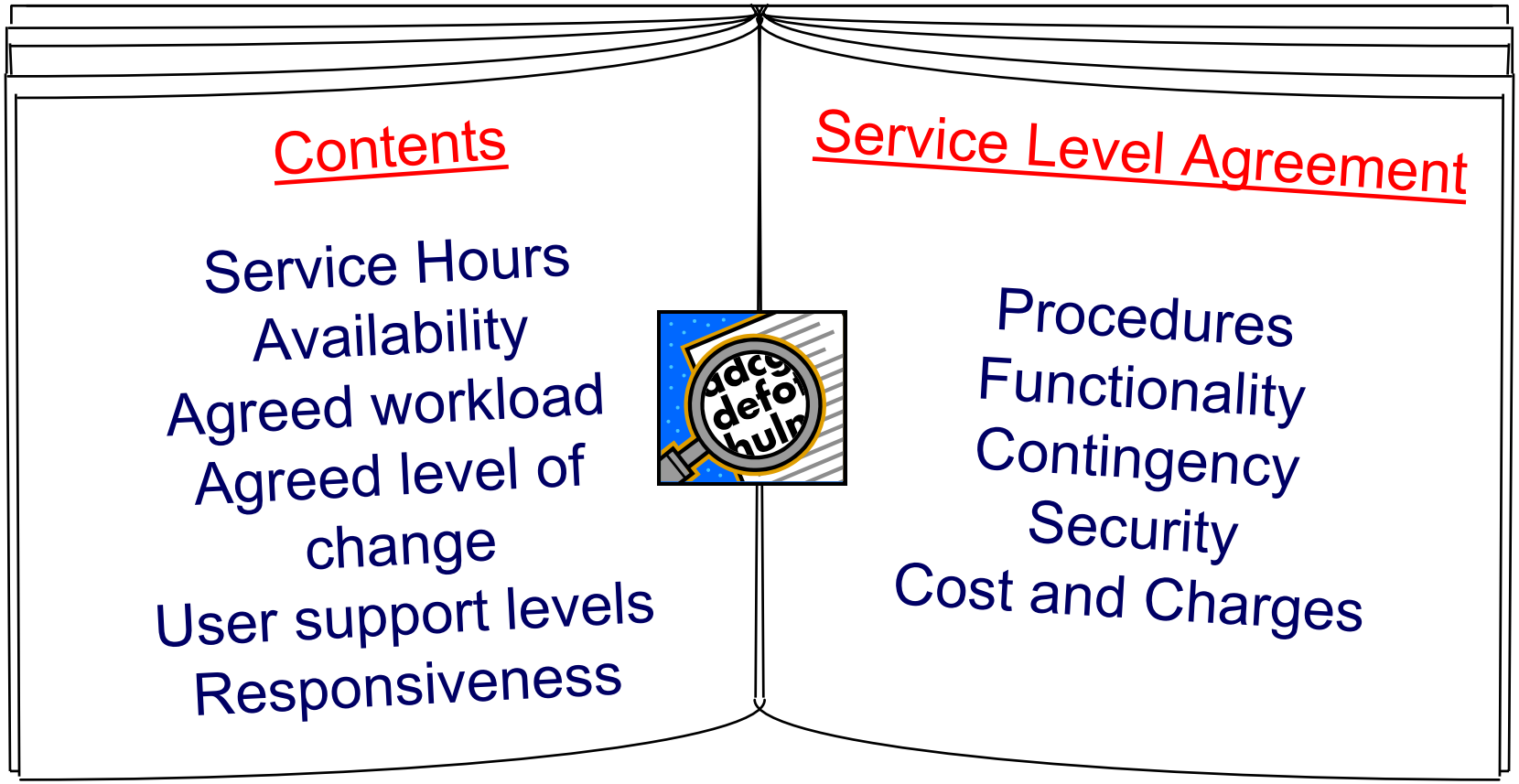
Key Contents of an SLA



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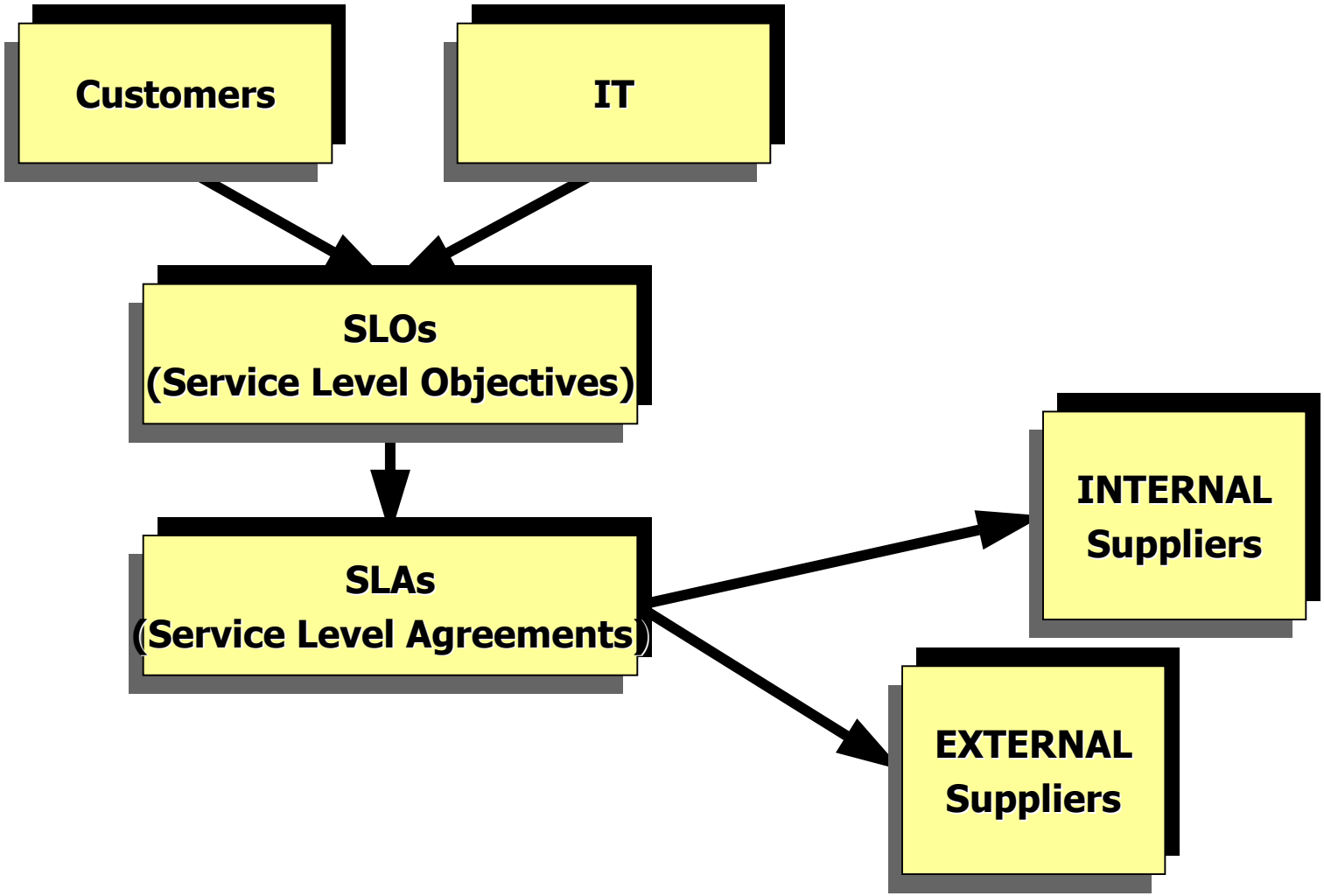
End-to-end Flow



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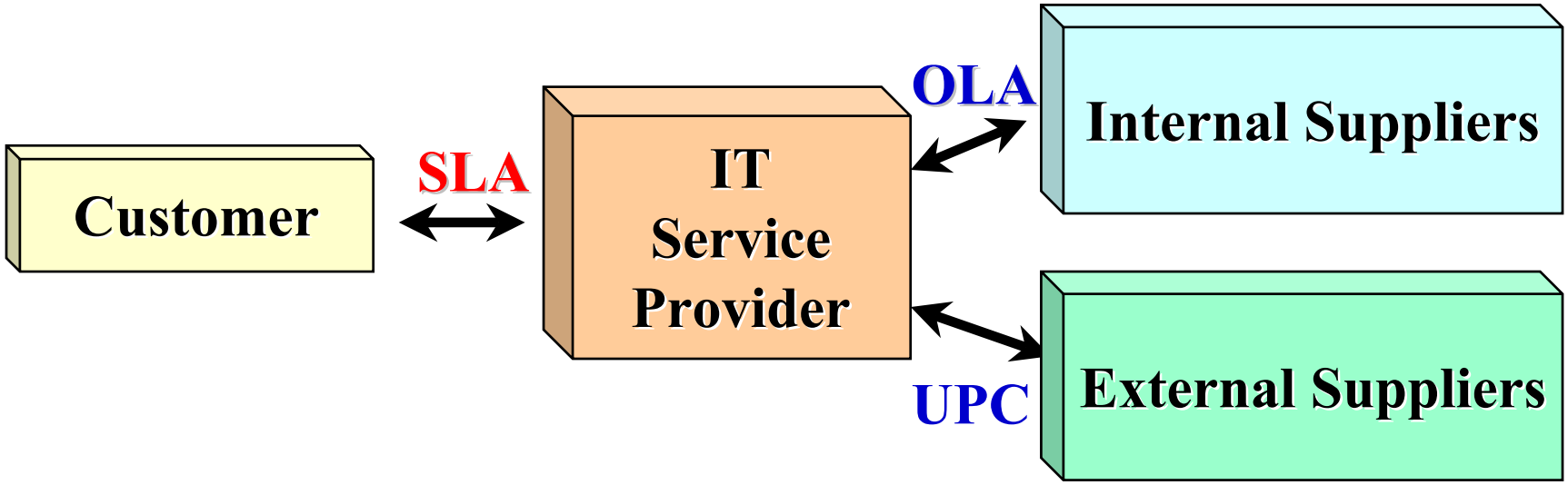
What Decisions to Make?

Agreements:

- SLA: Service Level Agreement
- OLA: Operations Level Agreement
- UPC: Underpinning Contracts



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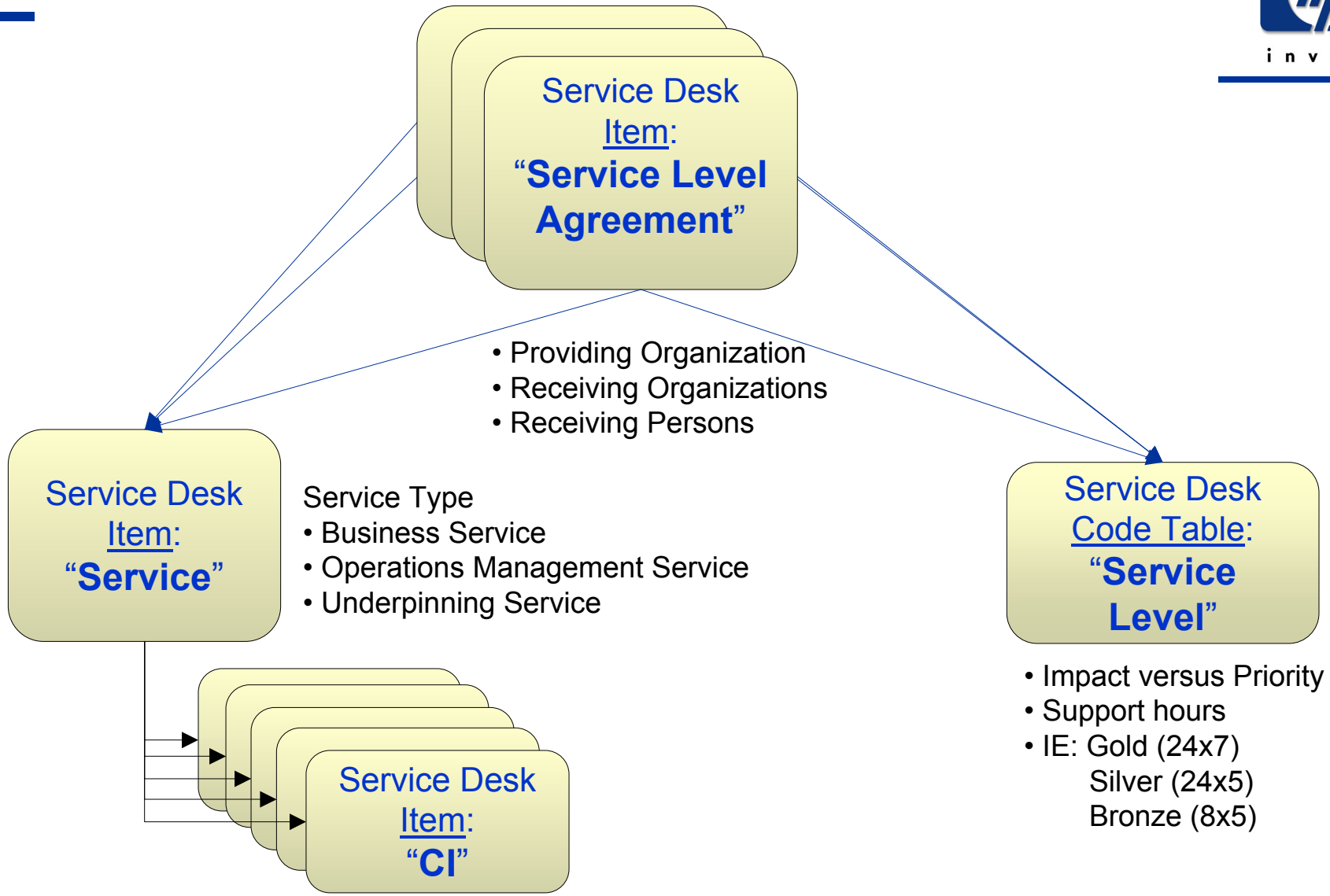
Structure in Service Desk



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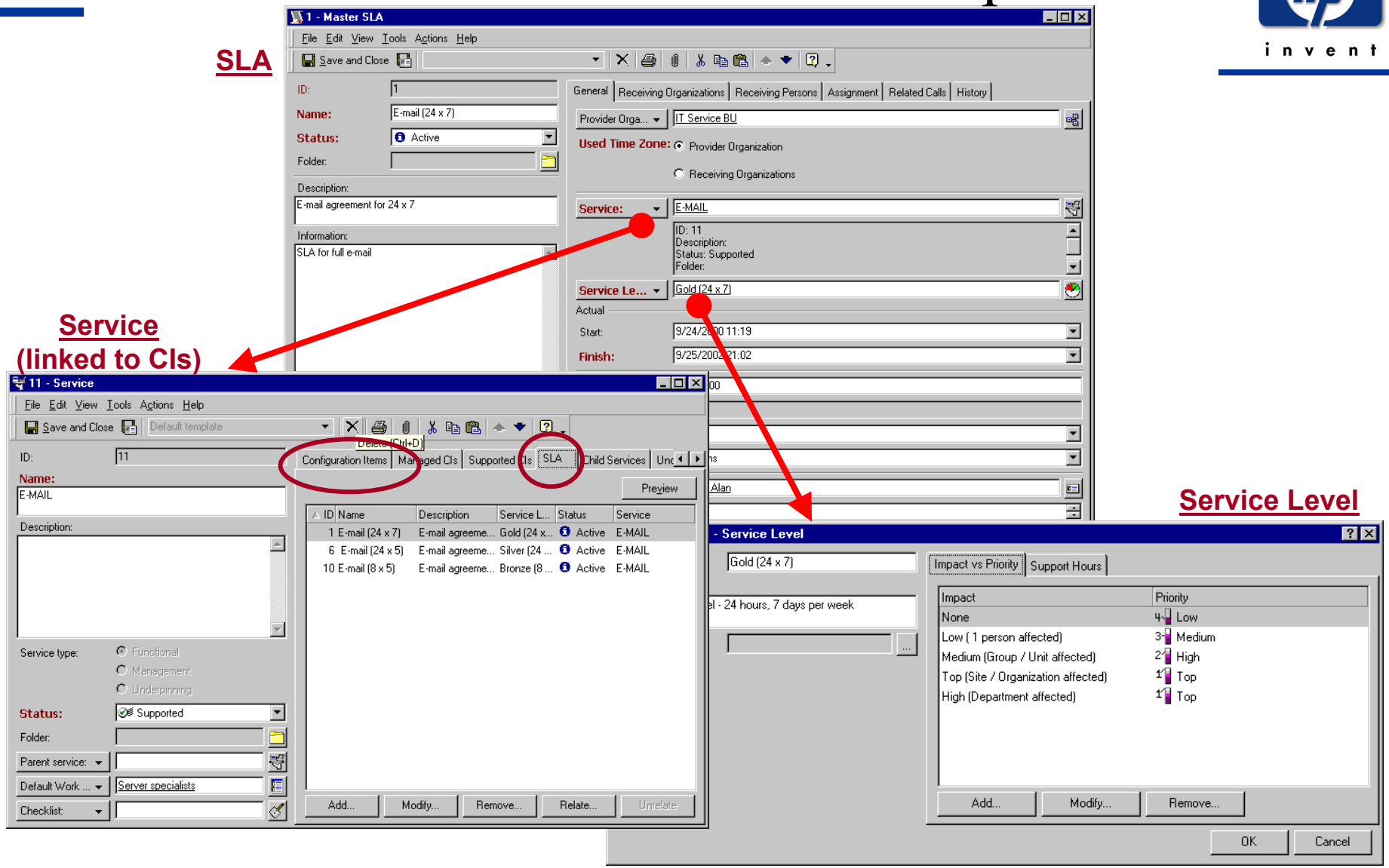
Structure in Service Desk—Example



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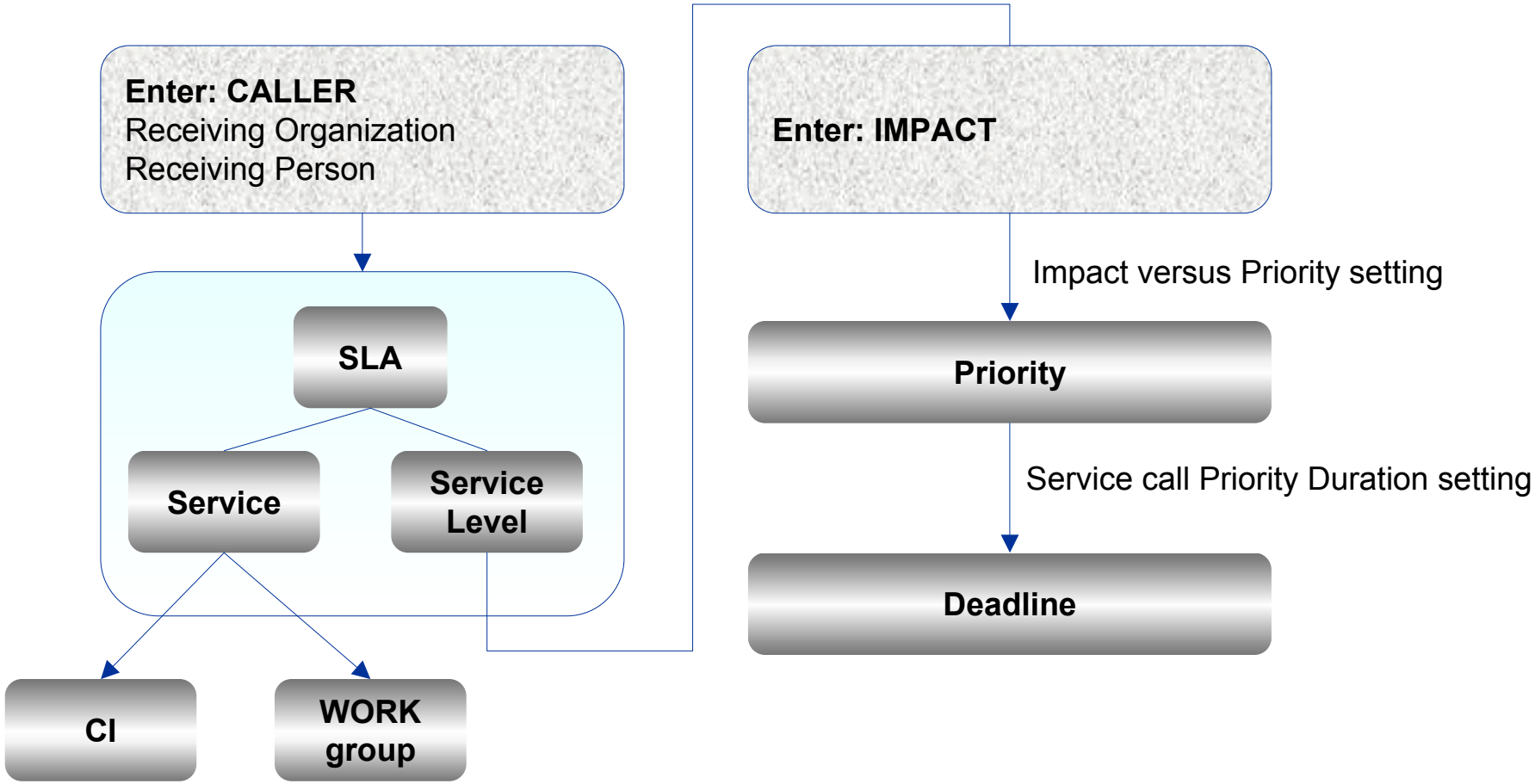
What Happens When You Enter a Service Call



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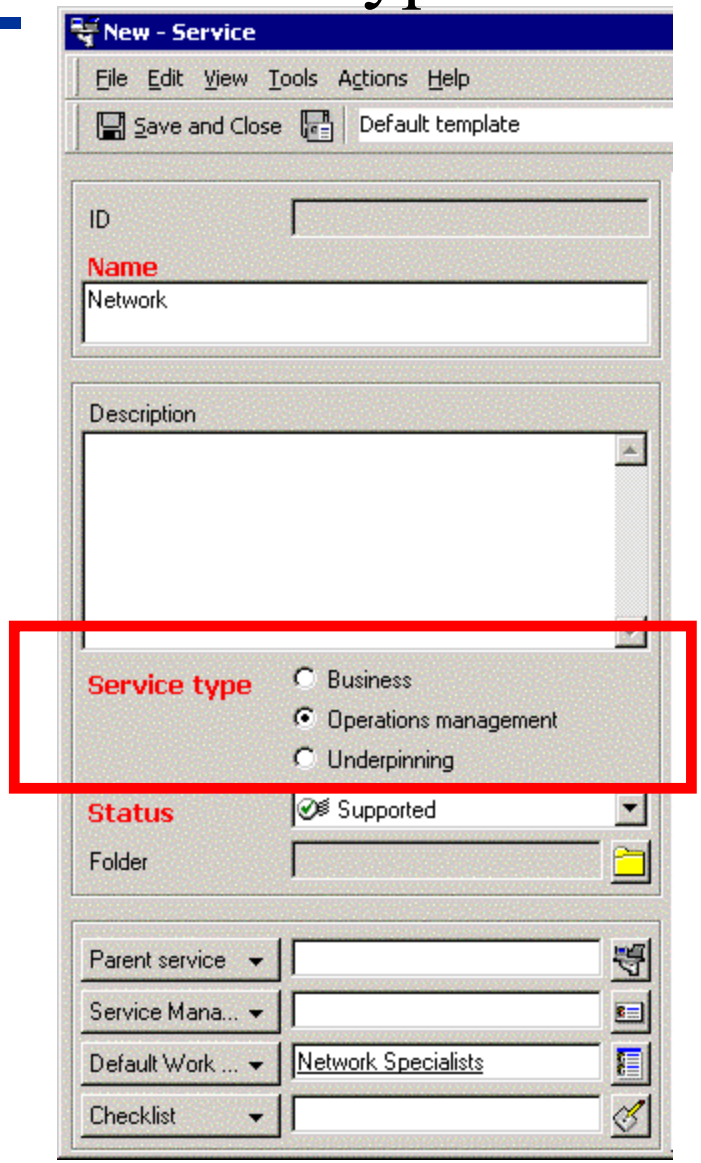
Service Types



- **Business**
  - **Business services delivered to customers with agreed level of service and cost**
- **Operations Management**
  - **General admin/fault handling services for shared resources used by business services**
- **Underpinning**
  - **Services out-sourced by operations management services**

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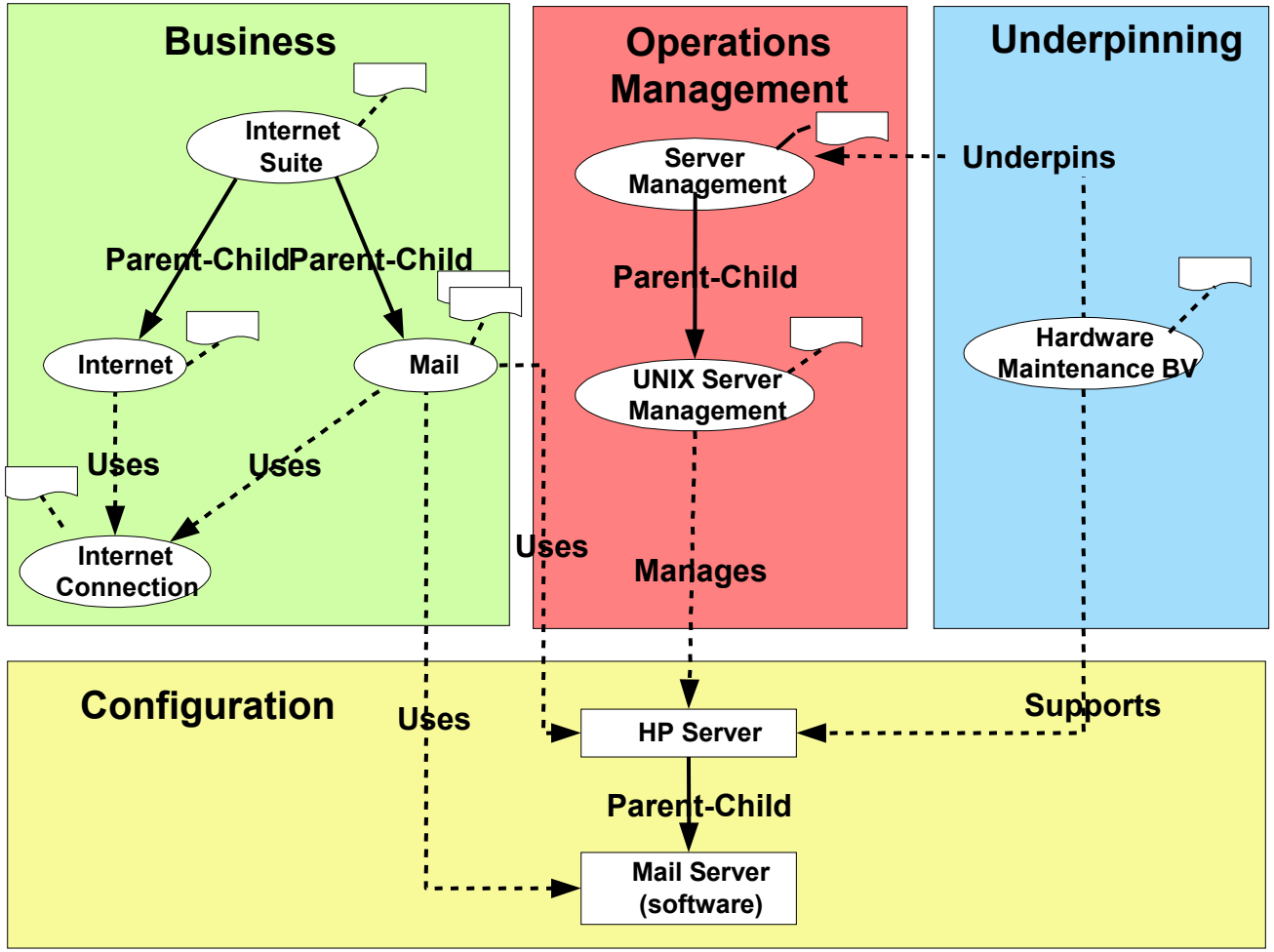
Relating Services



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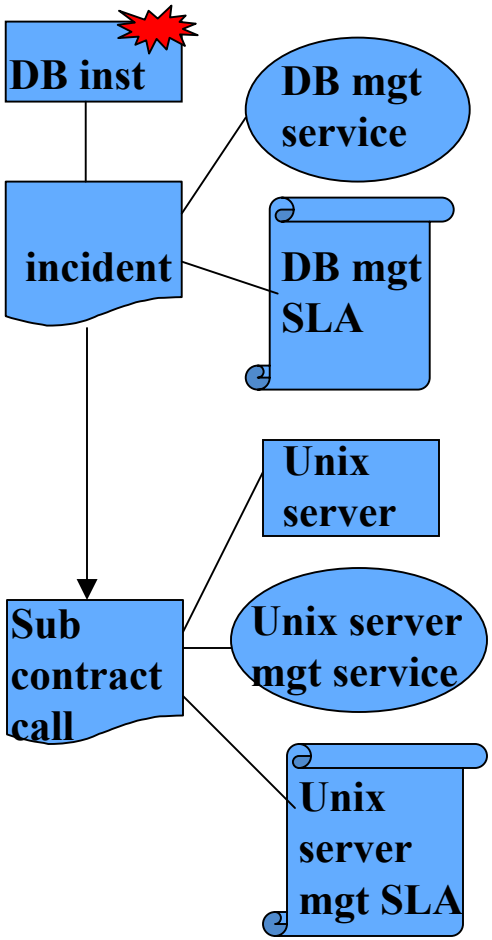
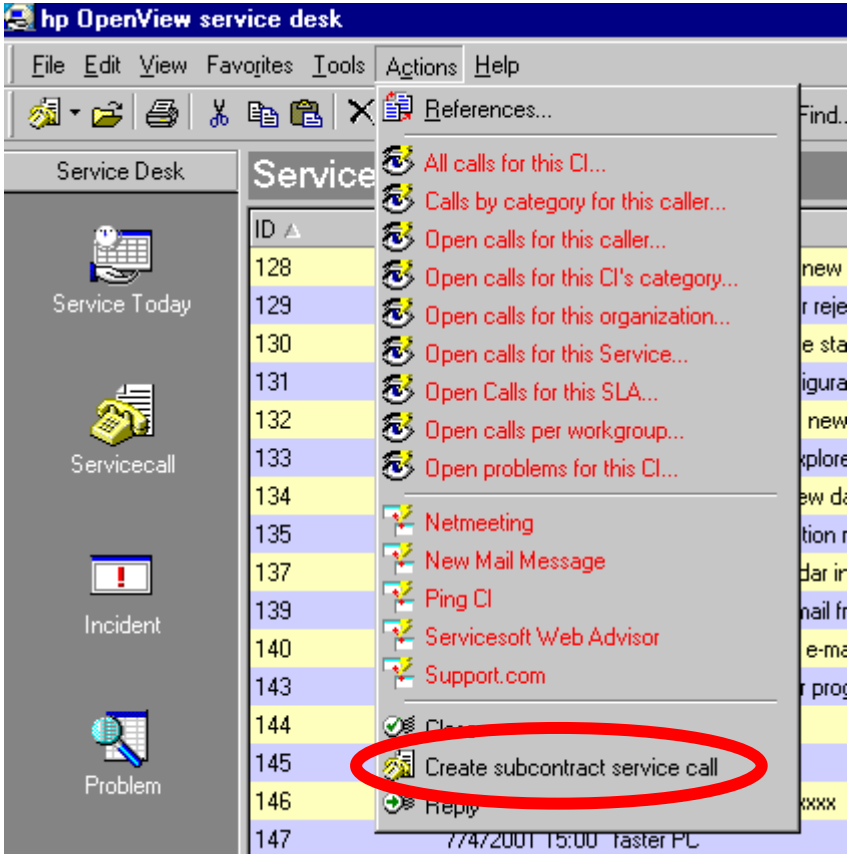
Subcontract Service Call





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SLA Evalution

- Evaluation types
  - Service availability
  - Analyzed performance
  - Planning performance

- Evaluation of SLAs based on:
  - Business services (based on service calls for customer perception or on both service calls and incidents)

  or

  - Operations Management or Underpinning services (generally based on incidents, other options available)

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Service availability evaluation

- This type evaluates the following aspects of service availability:
  - The amount of time the service was available, displayed as a percentage of total time. Availability can be calculated based on service support hours or on calendar time (that is, independent of support hours).
  - The mean time between failure (MTBF), which is defined as the average length of time between events that constitute service failure. MTBSI (Mean Time Between Service Incidents) is also possible.
  - The number of events (service calls or incidents) registered during the evaluation period.
  - The number of events with an impact equal to or higher than the failure impact code.
- Calculation based on open duration (=actual finish minus registration date/time)

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Analyzed performance evaluation

- This type evaluates the following aspects of the support organization's ability to analyze events:
  - The average time needed for the support organization to start working on a service call or incident (i.e. when did the call/incident change from its initial status to a predefined next status)
  - The average time needed for the support organization to solve service calls and incidents (i.e. when did the call/incident change from its initial status to a predefined next status)

- Depends on analyzed data configuration and activation

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Planning performance evaluation

- This type evaluates the following aspects of the support organization's ability to plan the resolution of events:
  - The number of calls/incidents that were not resolved within the planned duration
    - actual finish date is later than deadline
  - The number of calls that were not resolved within the maximum duration
    - actual duration time is greater than maximum duration (=deadline minus registered date)

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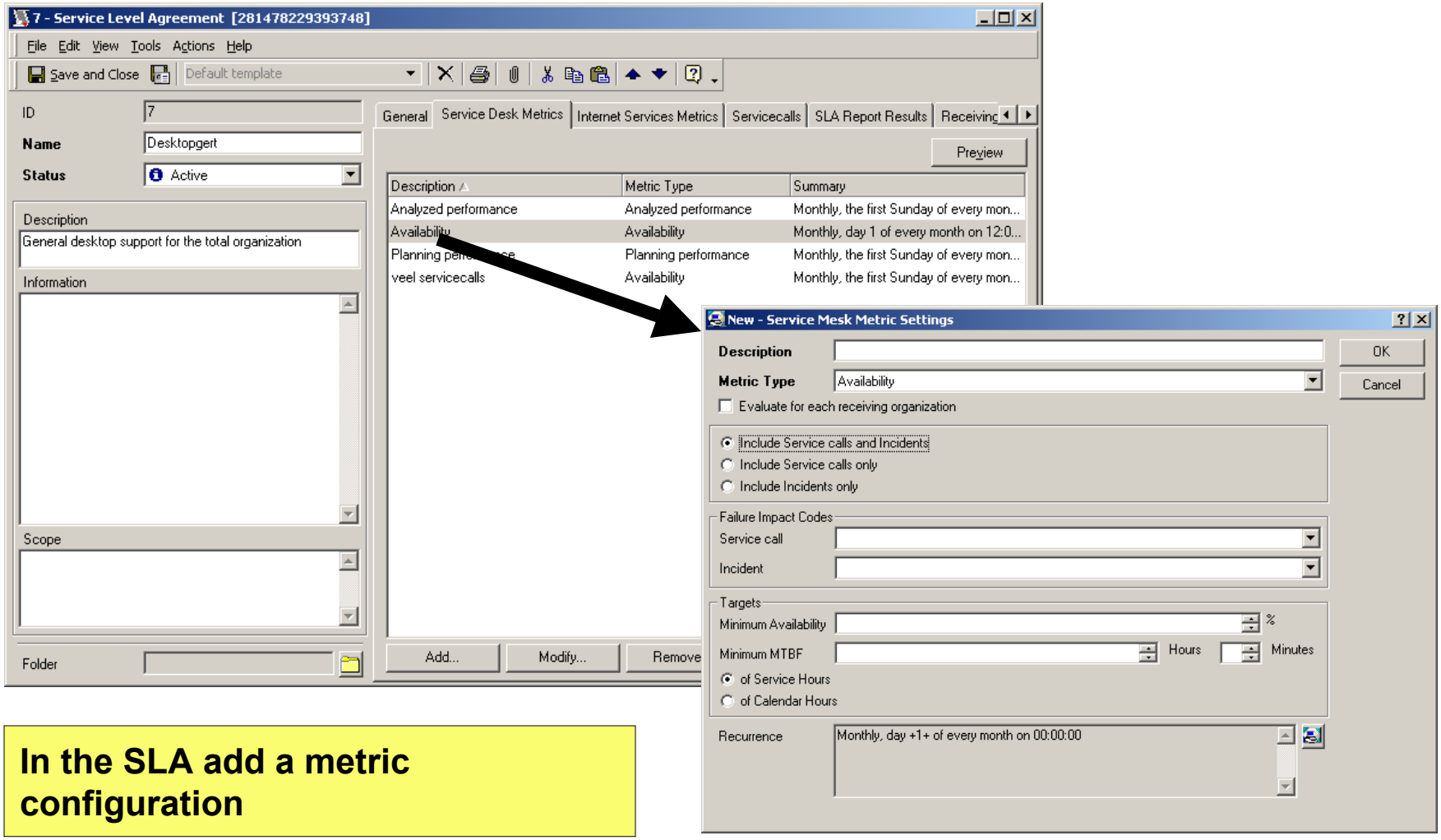
SLA evaluation metrics within SLA



In the SLA add a metric configuration

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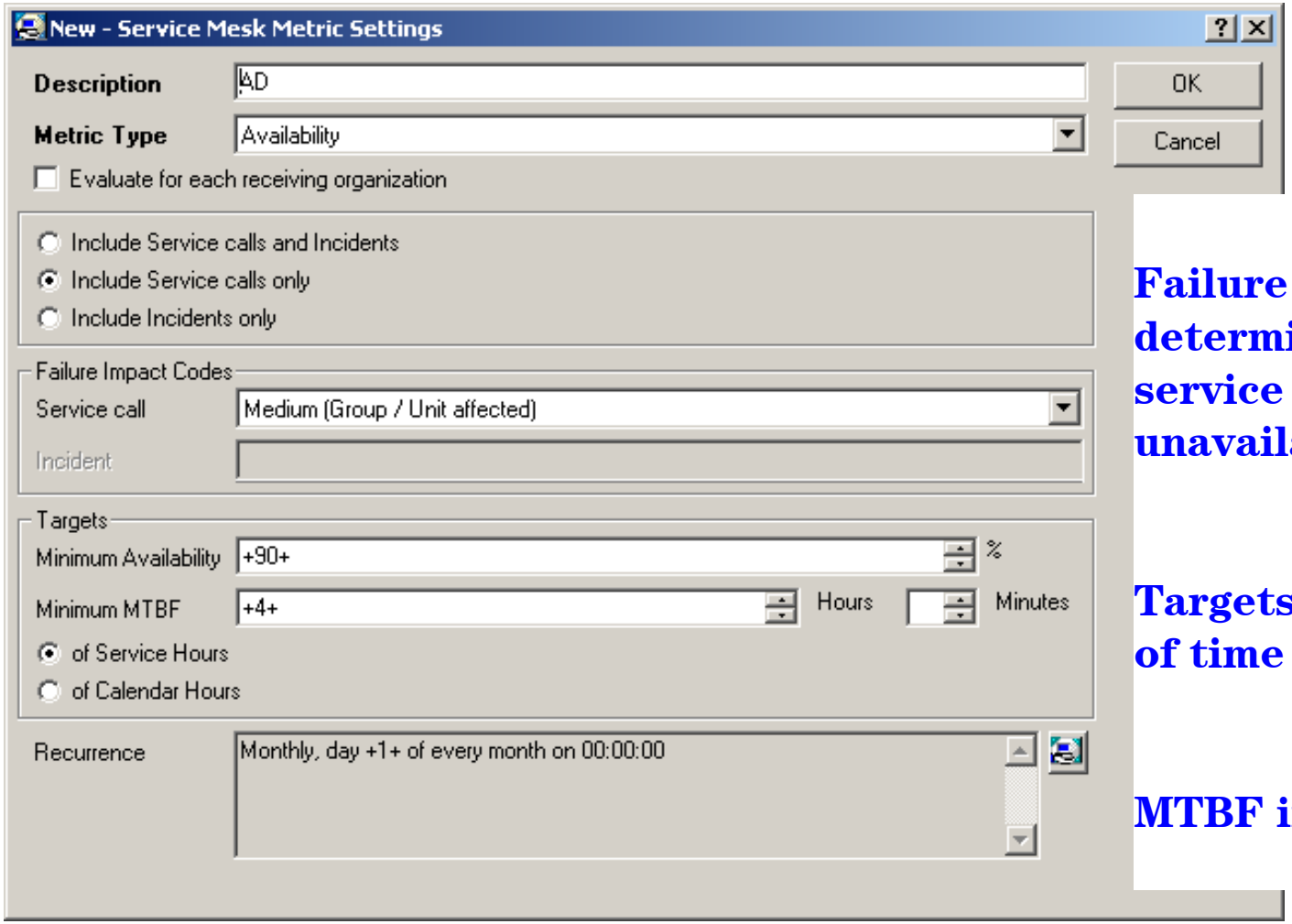
SLA evaluation metric configuration



Failure Impact Codes determine when a service is considered unavailable

Targets in percentage of time

MTBF in hours

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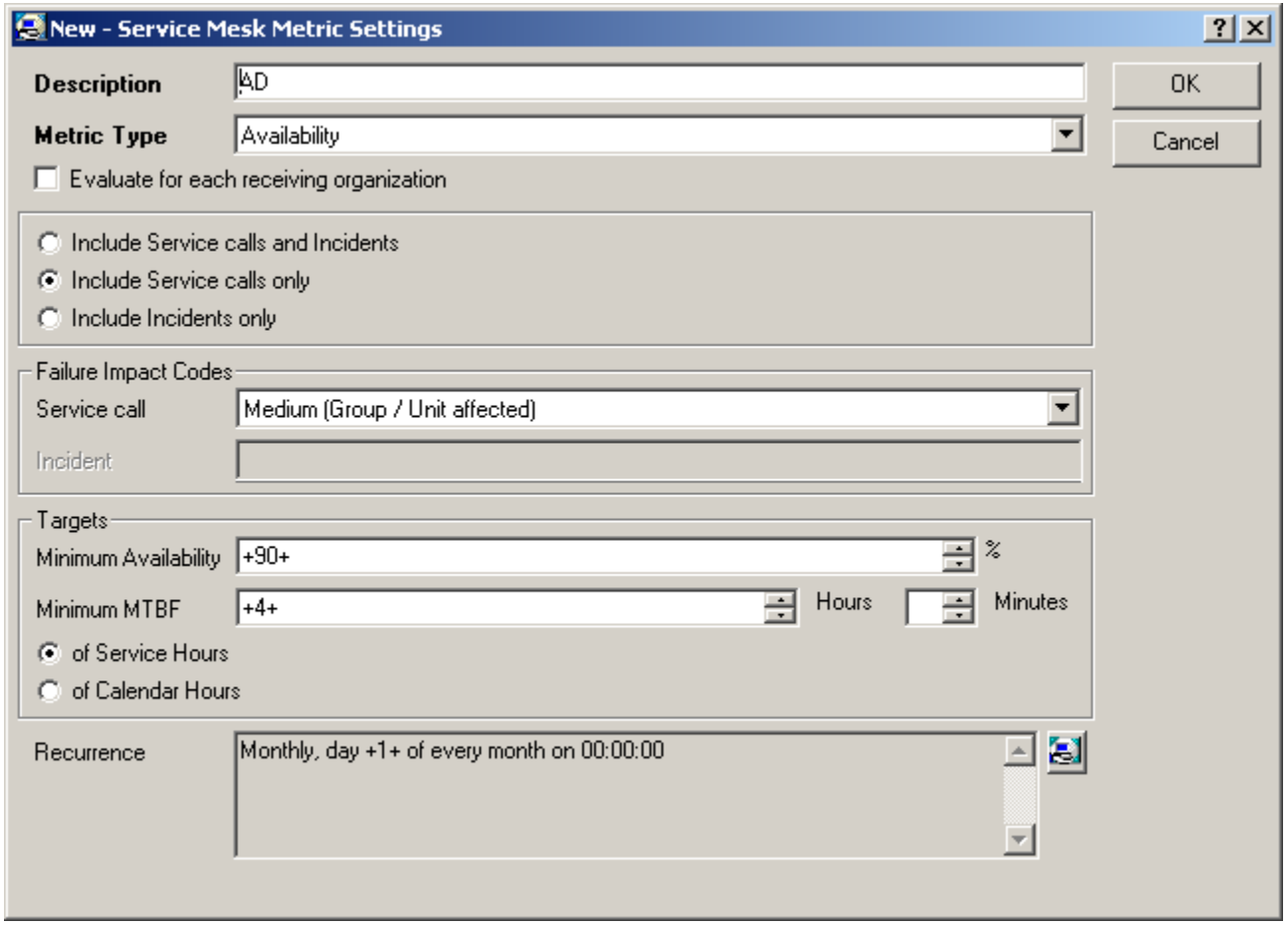
Conditions for evaluation



To be measured a service call must have a registered caller and SLA

An incident must have a registered SLA or service to be evaluated

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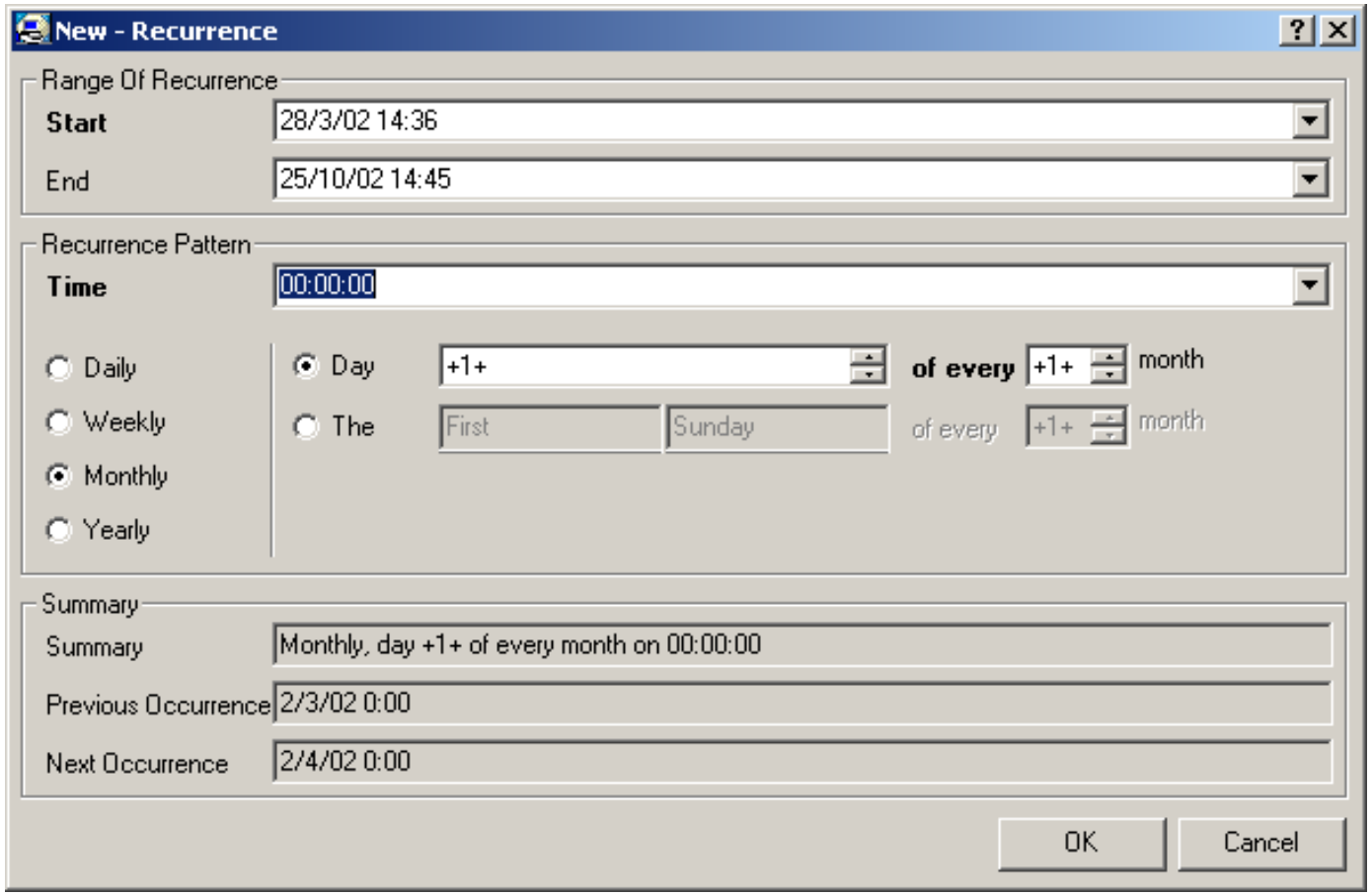
Evaluation recurrence



Recurrence is available for all evaluation types

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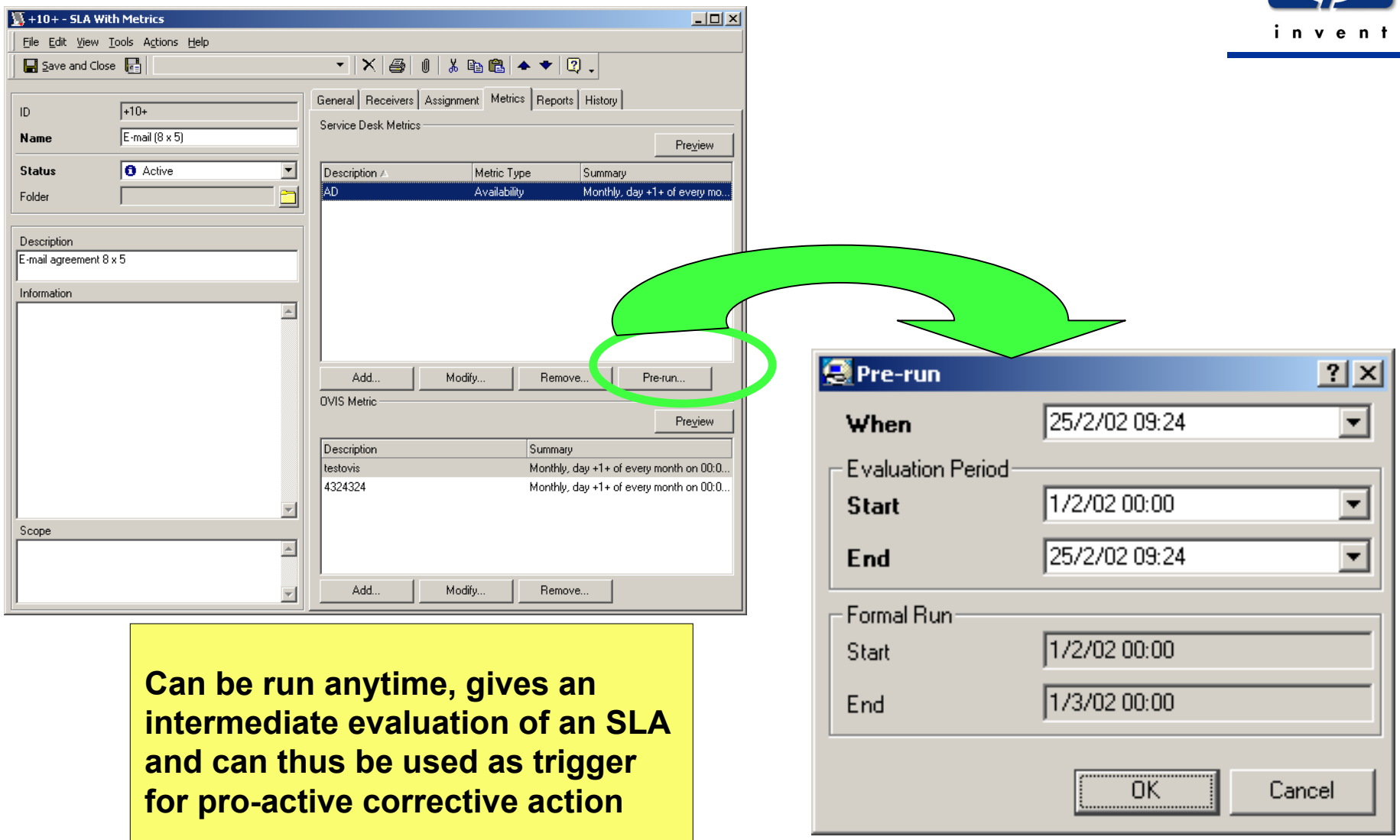
SLA Evaluation Pre-run



Can be run anytime, gives an intermediate evaluation of an SLA and can thus be used as trigger for pro-active corrective action

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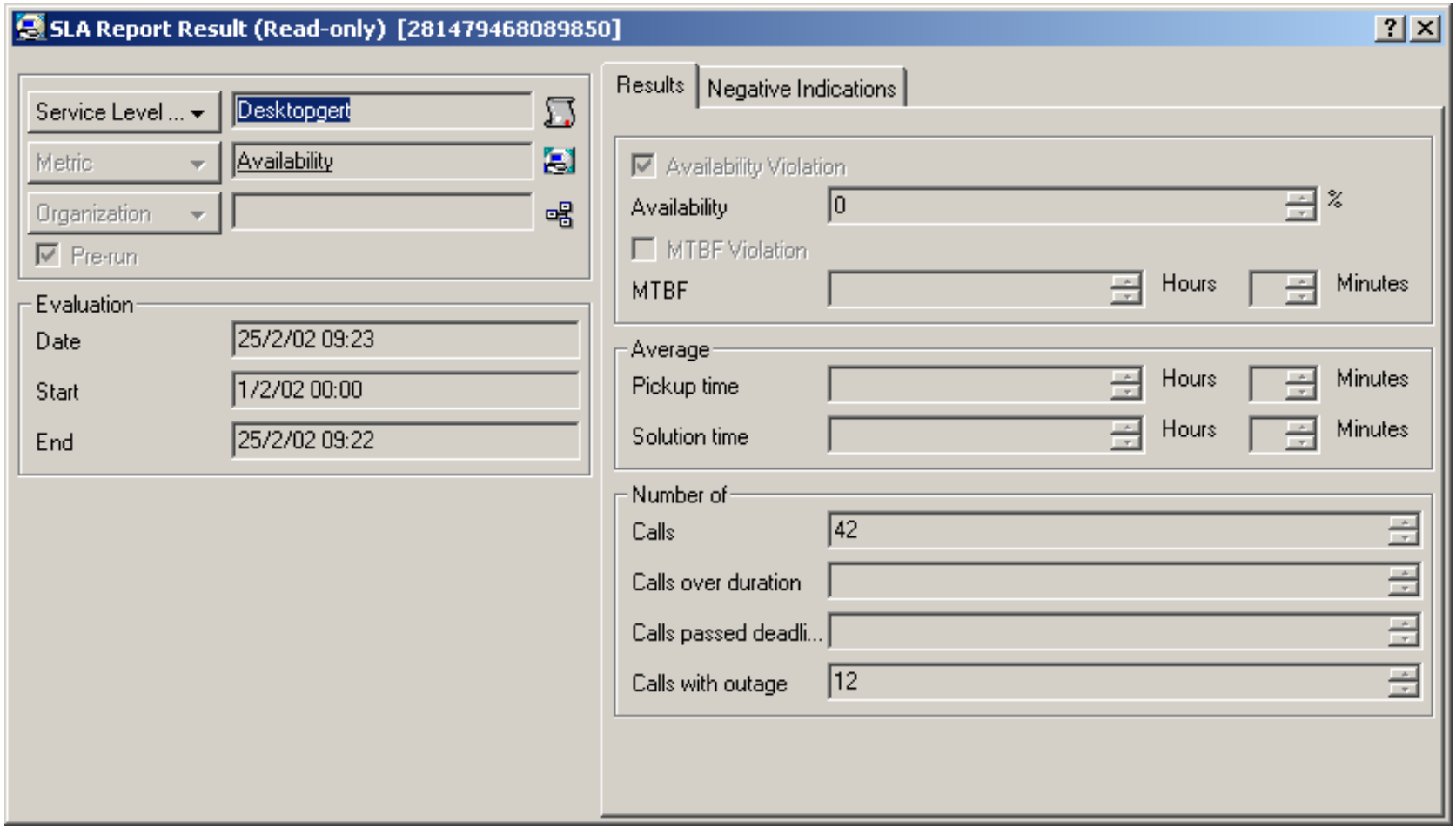
Evaluation report: results



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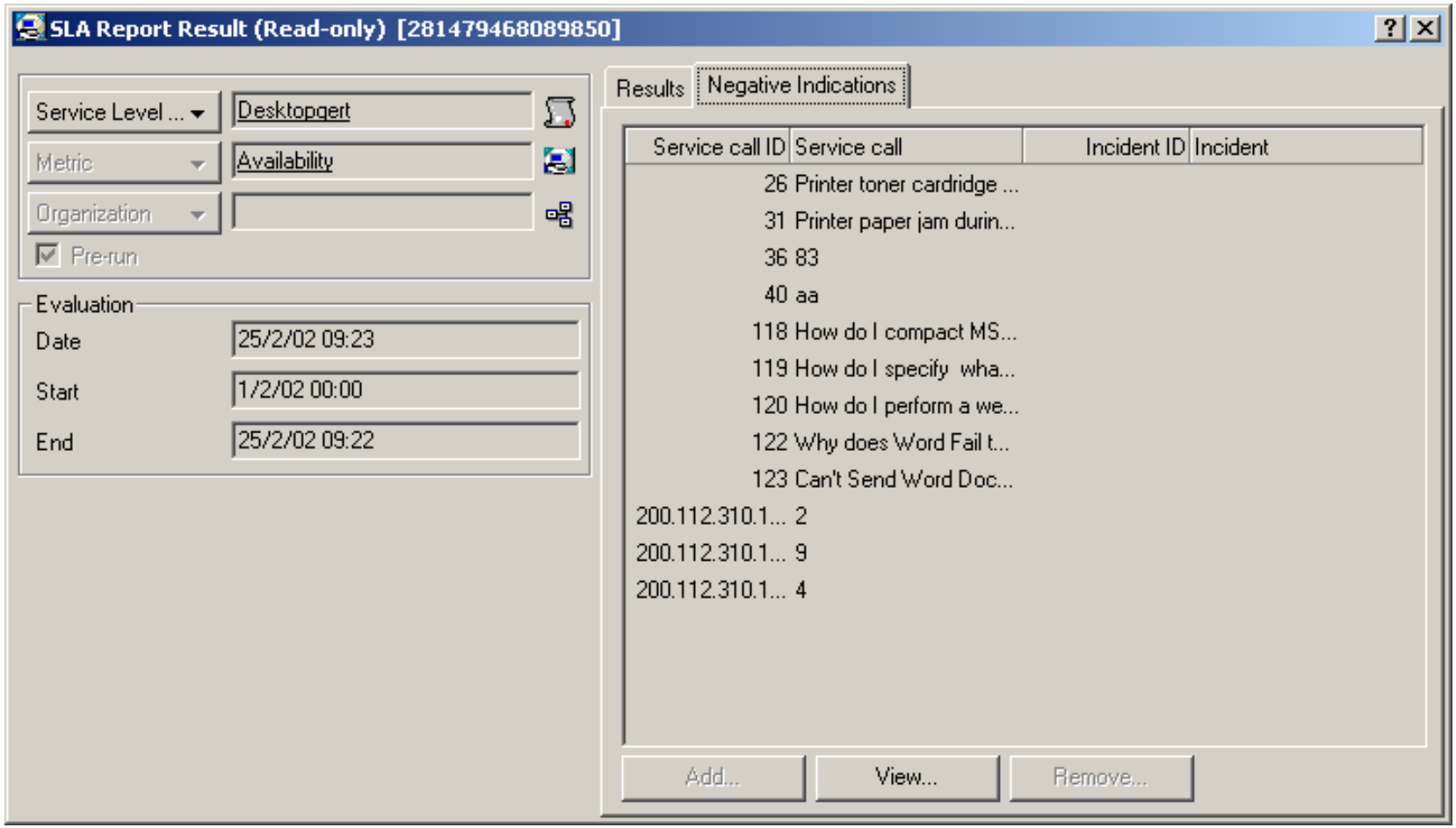
Evaluation report: negative indicators



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Key Performance Indicators

- # of SLA violations on a per service and customer basis (coupled with Helpdesk KPIs)
- # of SLAs per service
- # of active SLAs

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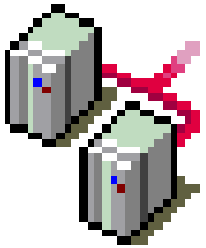
Let's:

- go see the tool…
- do some exercises…
- have a break…

Data Exchange



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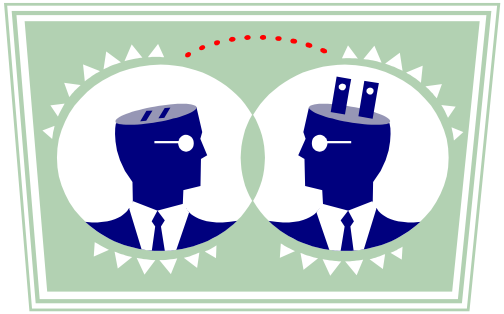
Data Exchange Concept

- Data exchange process

  Data Exchange is the process of exporting information from a data source, formatting it and then importing it into the Service Desk application.

- Data export (from data source to XML file)
  - `.ini`
  - `.xml`
  - `export.log`
- Data import (from XML into SD database)
  - `import mapping`
  - `import.log`



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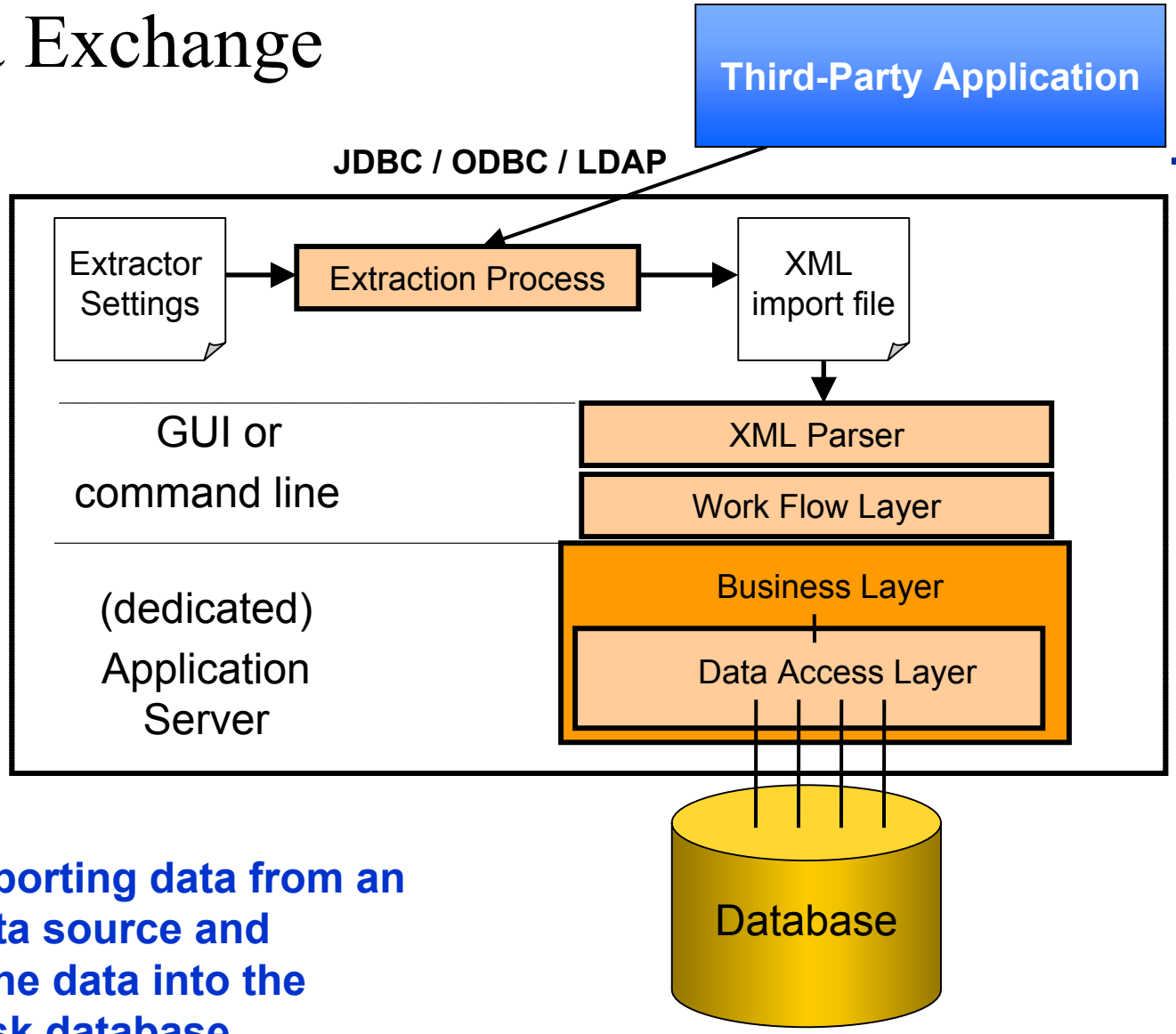
Data Exchange



Enables exporting data from an external data source and importing the data into the Service Desk database.

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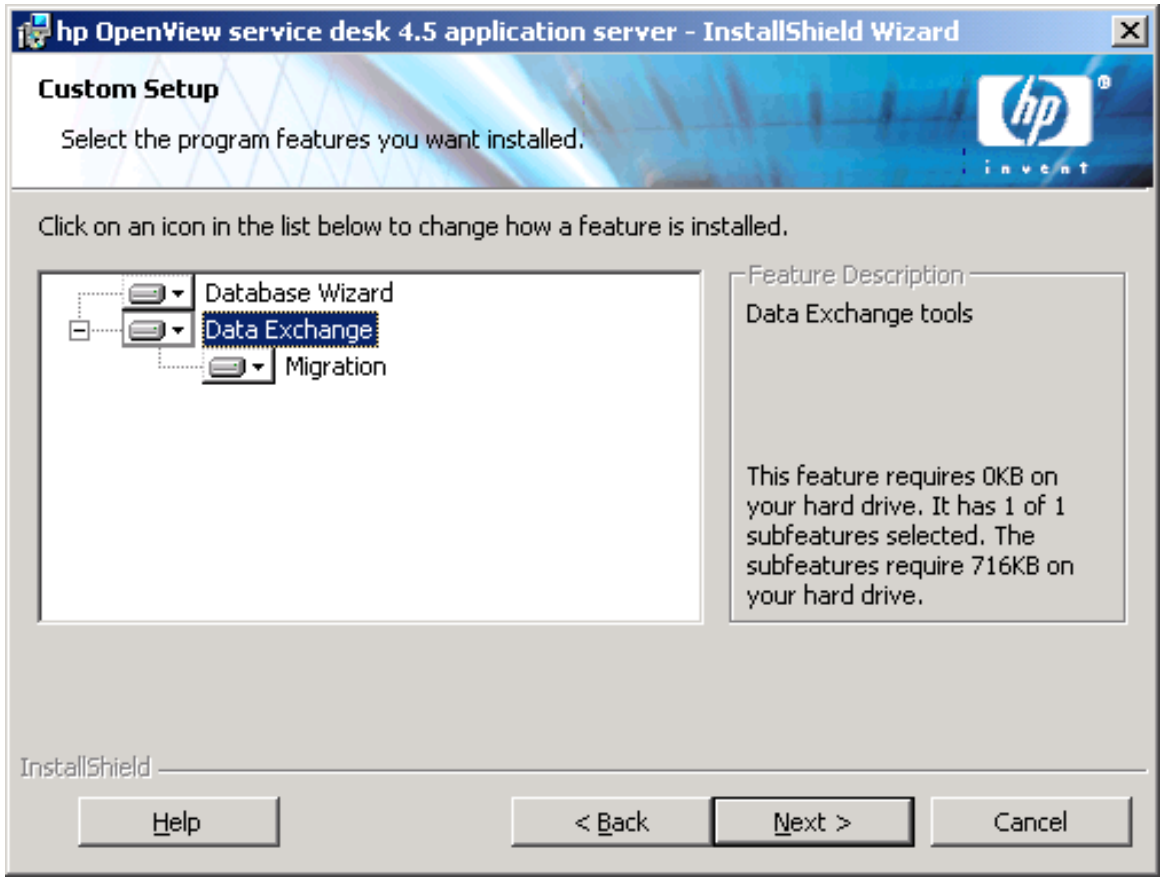
Data Exchange Installation

The data exchange feature is part of the “Typical” installation of the SD Server & Client installation. The data exchange feature is also available via the custom setup.



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Data Exchange Steps

Step 1. Establish a connection to your external data source (ODBC,JDBC,LDAP)

Step 2. Create or modify a configuration file (.ini)
(Data Extraction Configuration Wizard)

Step 3. Run extractor from Service Desk to export data from source.
Use viewer to check exported XML file. Redo extractor config, if needed, export data again

Step 4. Configure data import settings. Map external application classes, properties and values to Service Desk items, attributes, and values

Step 5. Import data from XML data exchange file into Service Desk.
Configure batch importing. (Delta importing also possible)
Save settings as task and setup scheduling

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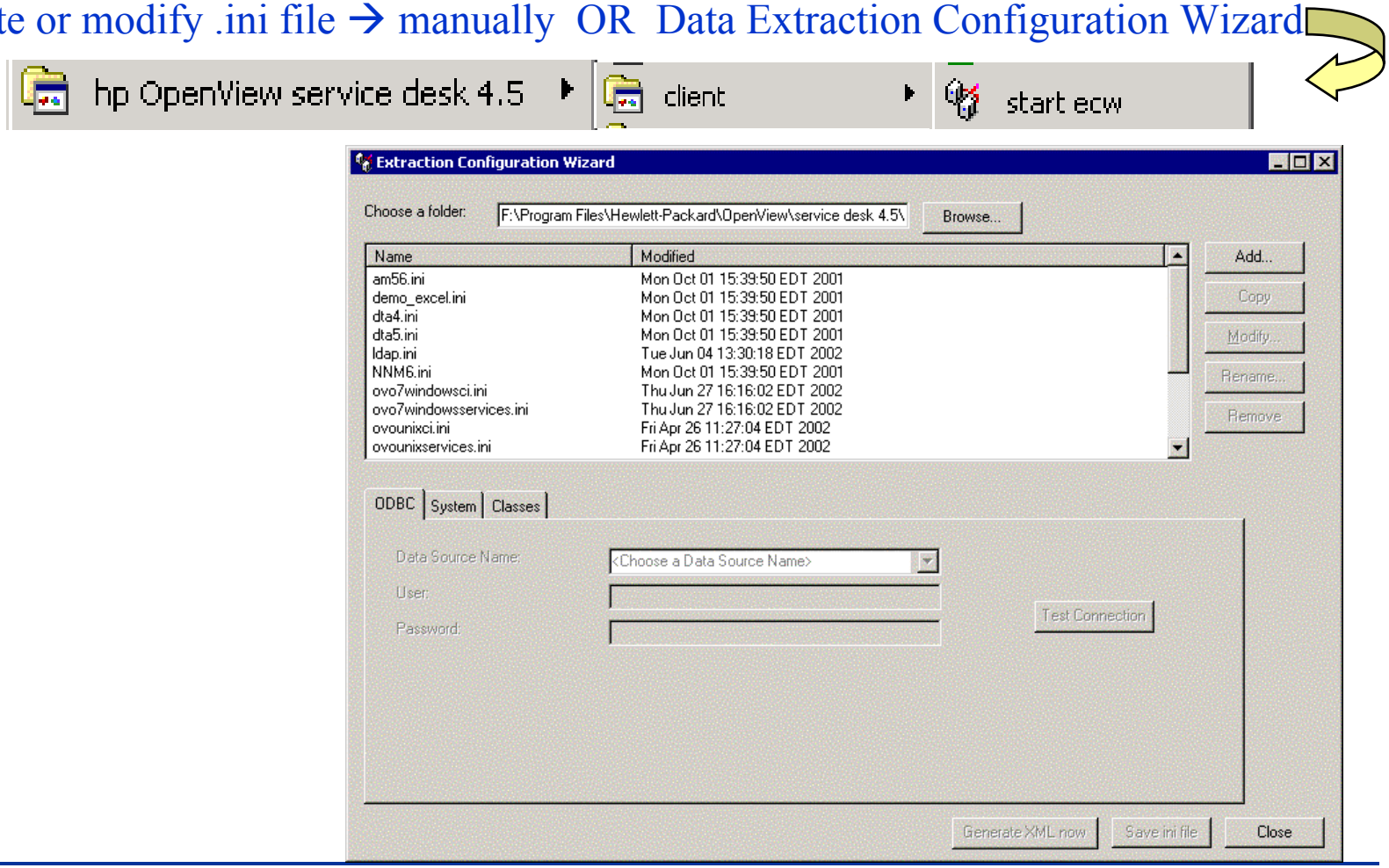
Extraction Configuration Wizard

1. Establish a connection to your external data source

2. Create or modify .ini file → manually OR Data Extraction Configuration Wizard



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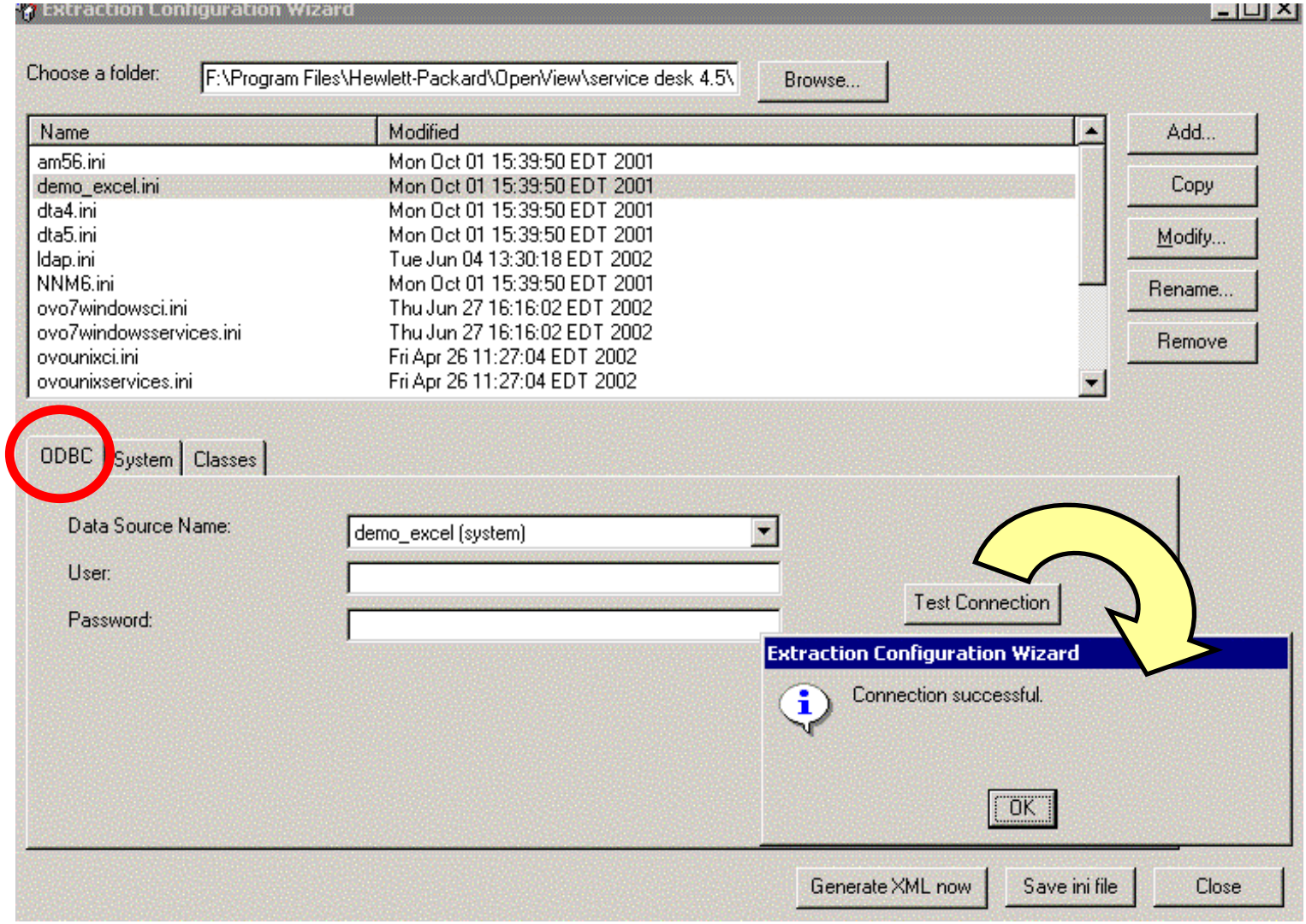
Extraction Configuration Wizard "ODBC"



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Extraction Configuration Wizard " System"

Extraction Configuration Wizard

Choose a folder: F:\Program Files\Hewlett-Packard\OpenView\service desk 4.5\ Browse...

Name	Modified
am56.ini	Mon Oct 01 15:39:50 EDT 2001
demo_excel.ini	Mon Oct 01 15:39:50 EDT 2001
dta4.ini	Mon Oct 01 15:39:50 EDT 2001
dta5.ini	Mon Oct 01 15:39:50 EDT 2001
ldap.ini	Tue Jun 04 13:30:18 EDT 2002
NNM6.ini	Mon Oct 01 15:39:50 EDT 2001
ovo7windowsci.ini	Thu Jun 27 16:16:02 EDT 2002
ovo7windowsservices.ini	Thu Jun 27 16:16:02 EDT 2002
ovounixci.ini	Fri Apr 26 11:27:04 EDT 2002
ovounixservices.ini	Fri Apr 26 11:27:04 EDT 2002

Add... Copy Modify... Rename... Remove

ODBC System Classes

Create a log file: demo_excel.log Browse...

Generate an XML file: demo_excel.xml Browse...

Application Name: demo_excel

Output to screen

Encoding used:

Generate XML now Save ini file Close

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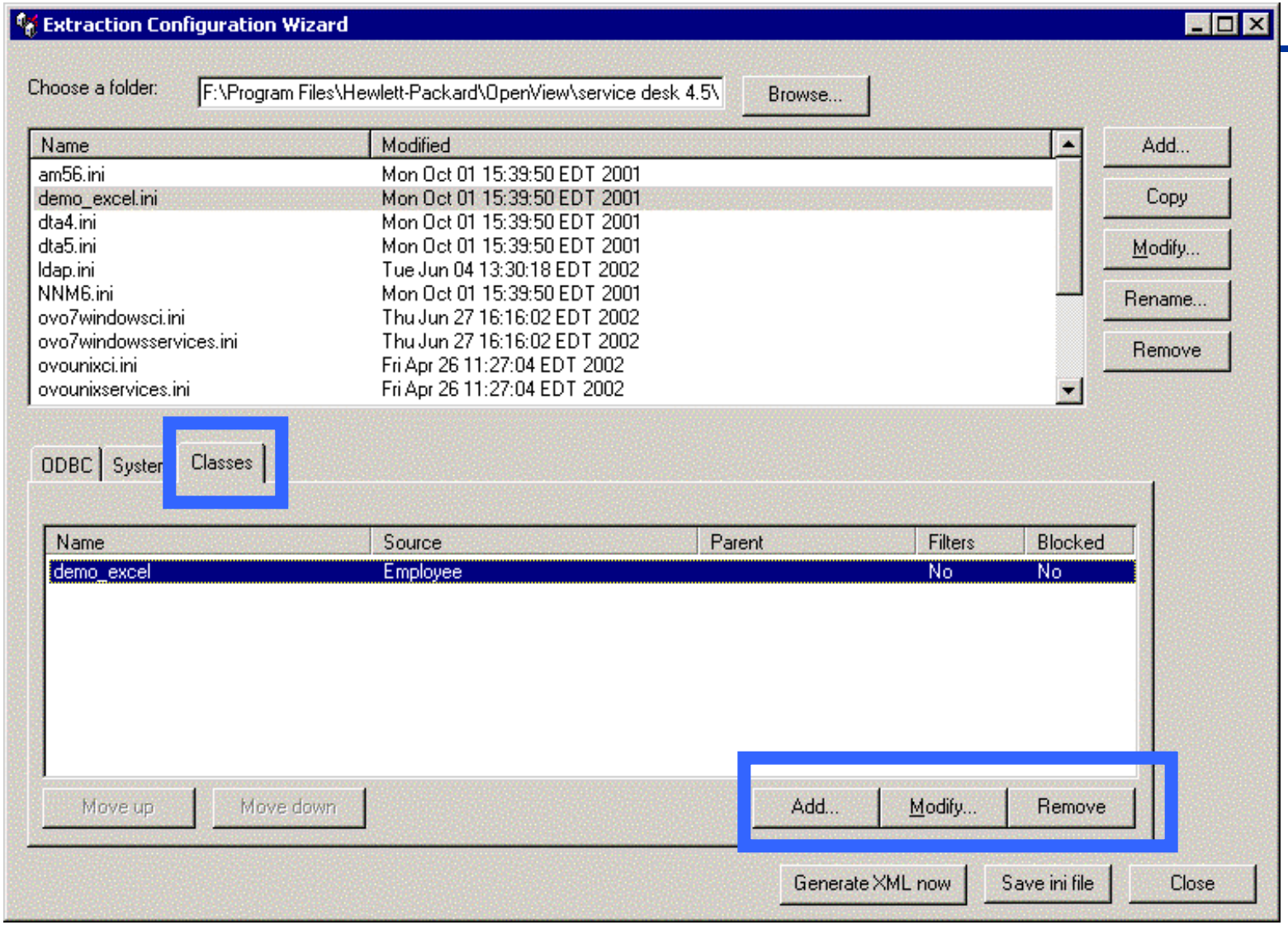
Extraction Configuration Wizard “Classes”



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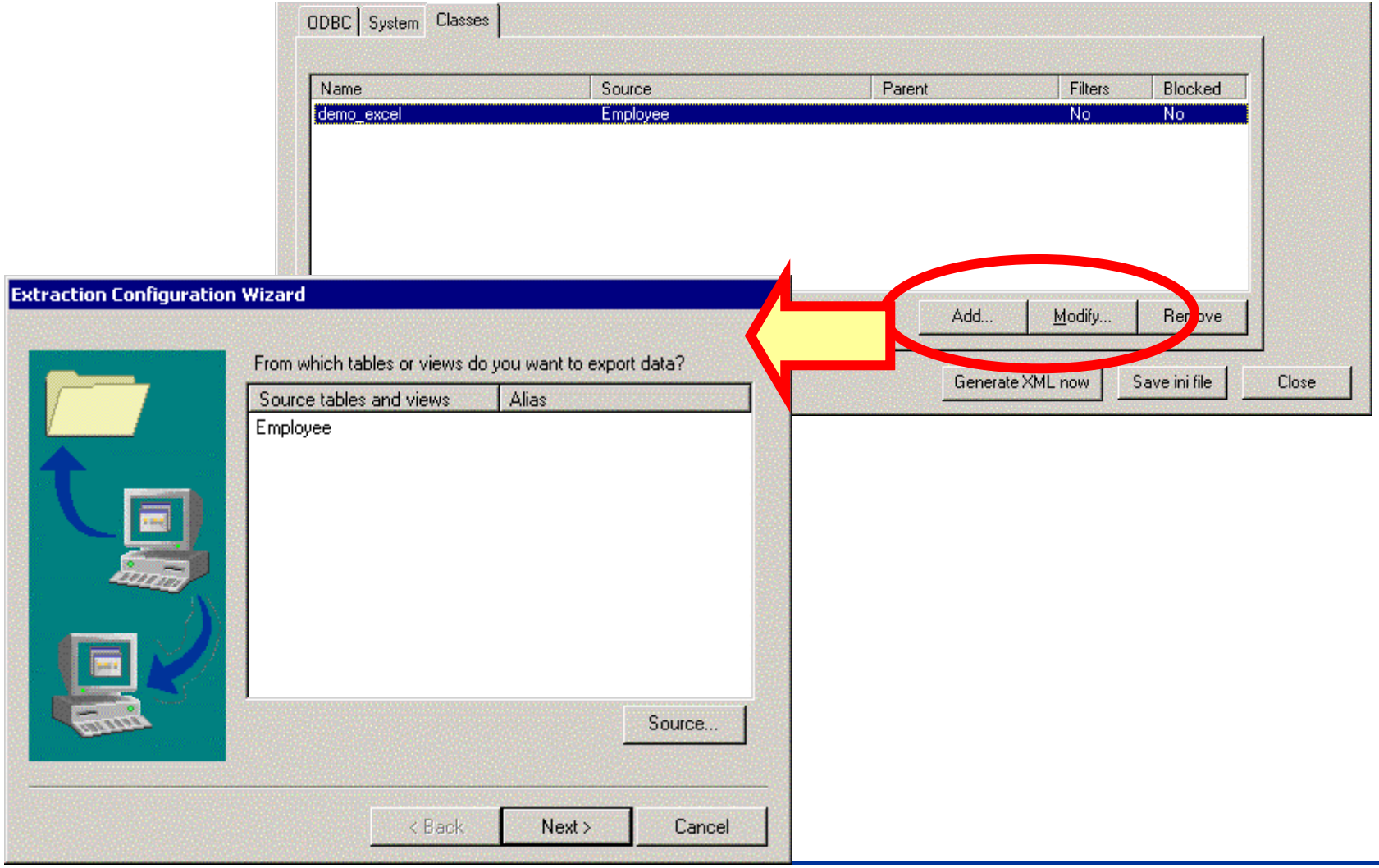
Extraction Configuration Wizard – Source Tables



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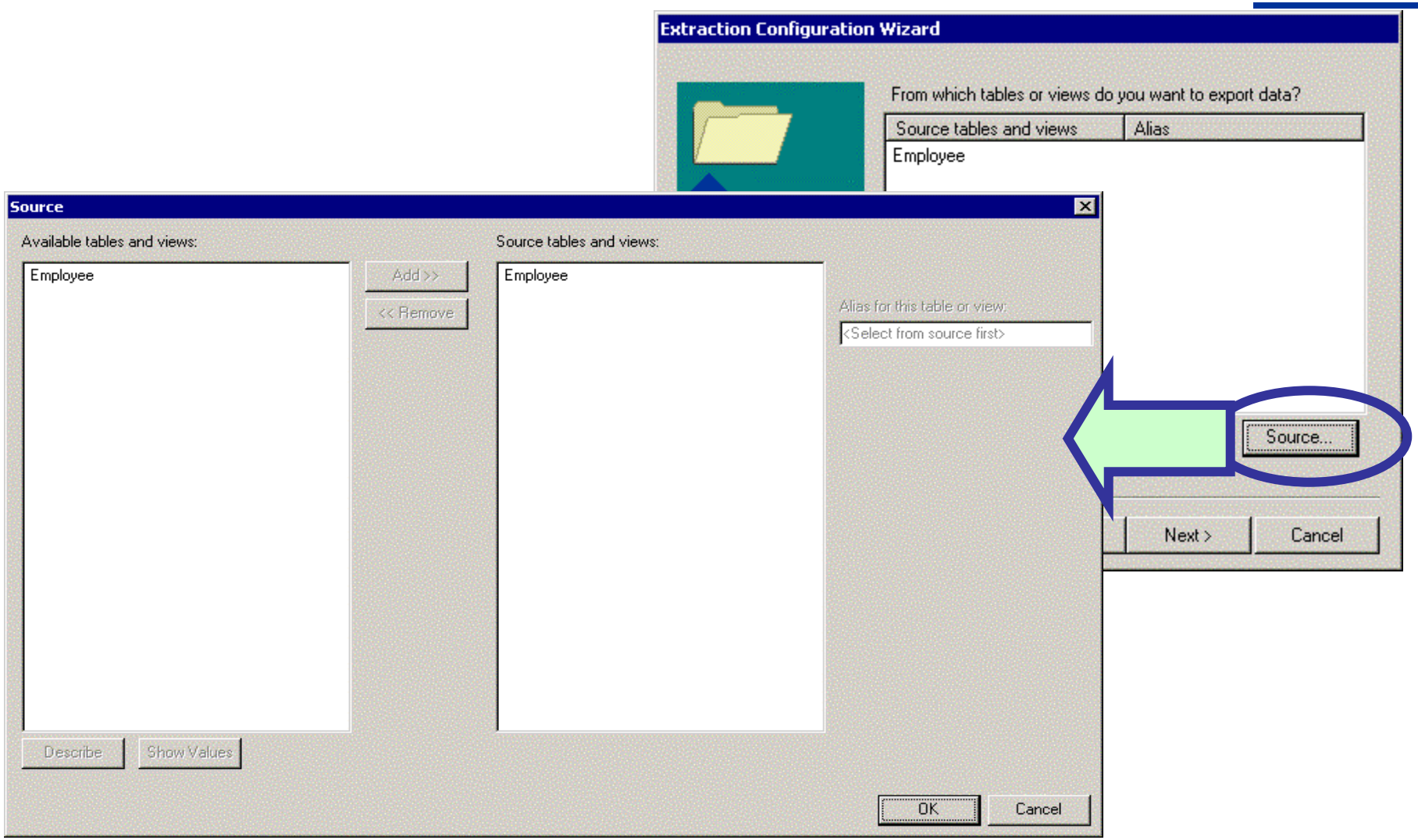
Extraction Configuration Wizard – Selecting Source Tables



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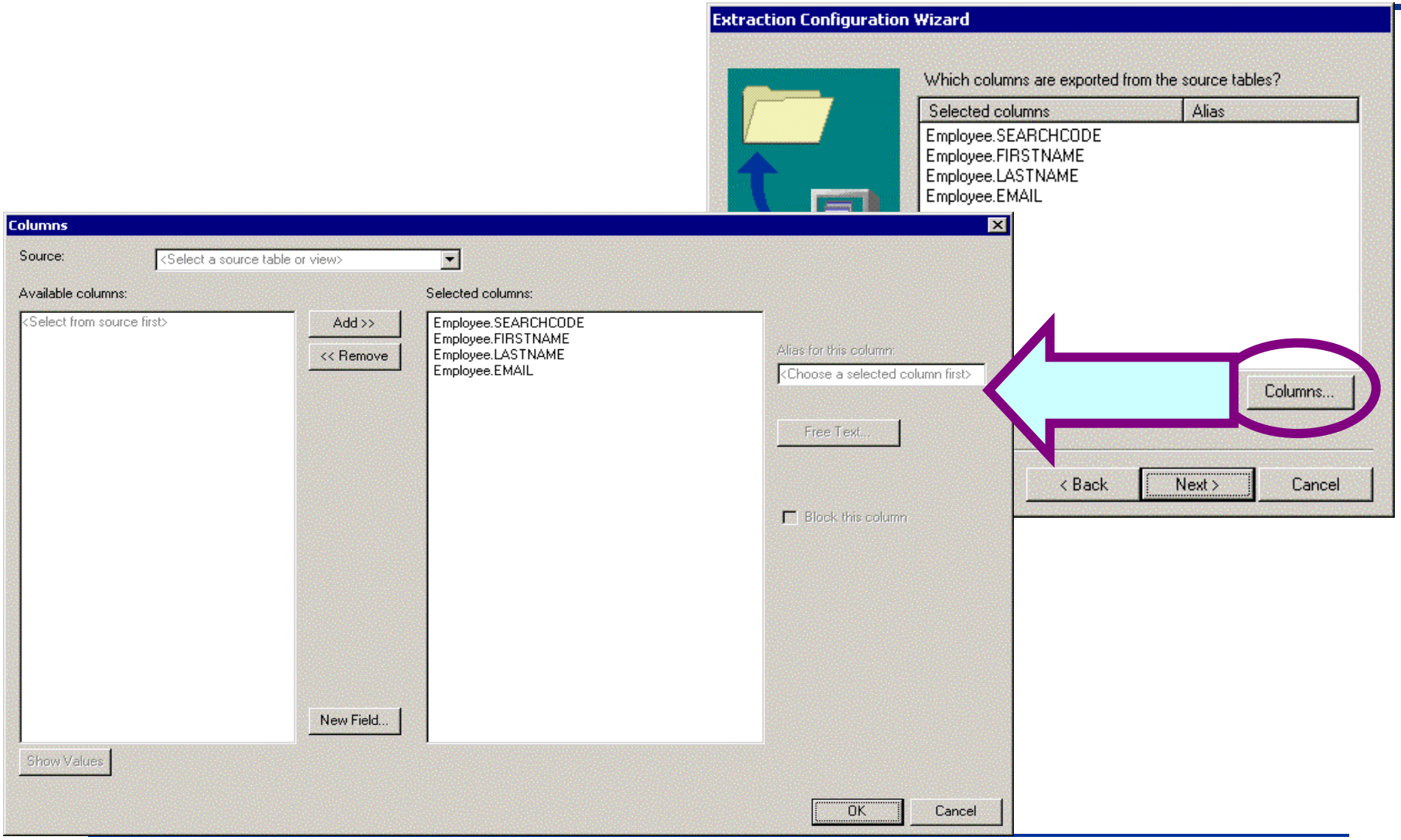
Extraction Configuration Wizard – Select Table Columns



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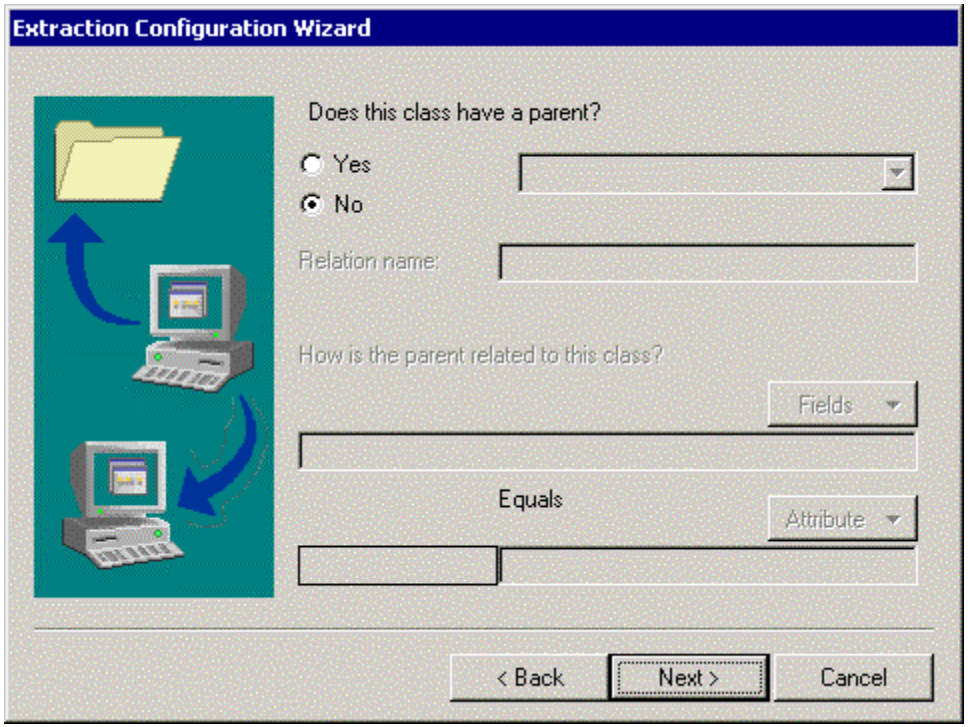
Extraction Configuration Wizard – Parent Relation



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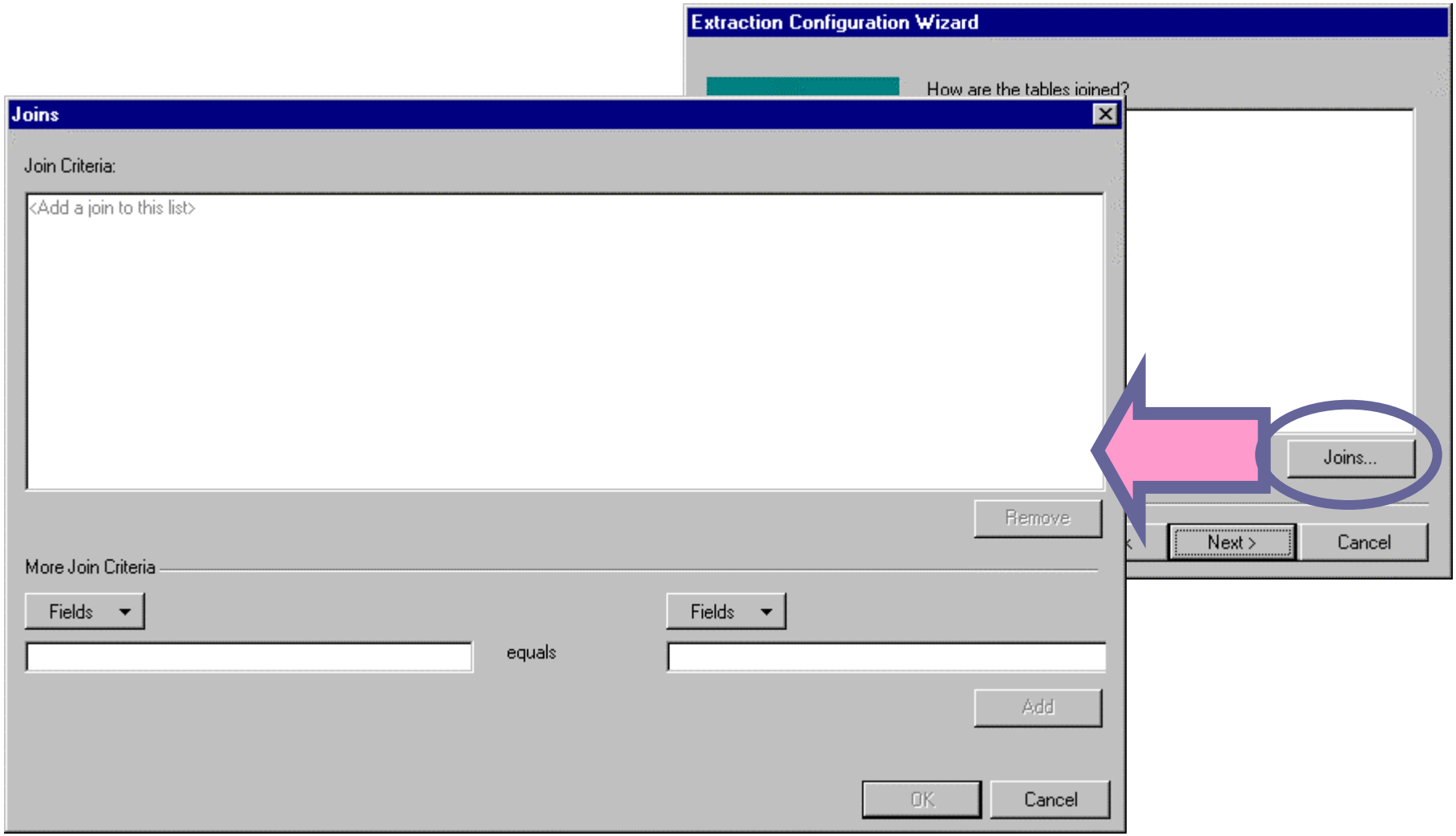
Extraction Configuration Wizard – Tables Joined



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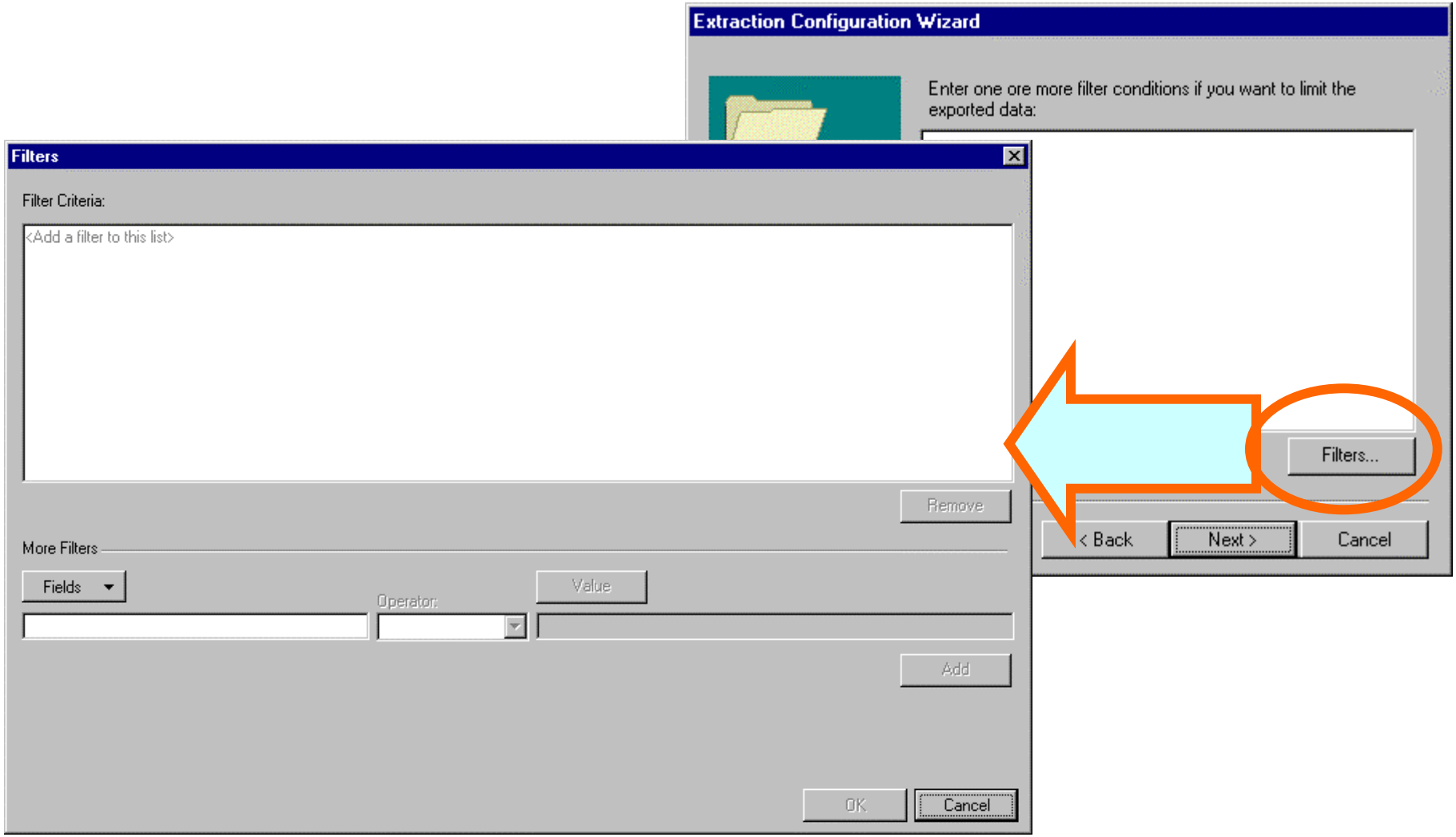
Extraction Configuration Wizard – Filter Conditions



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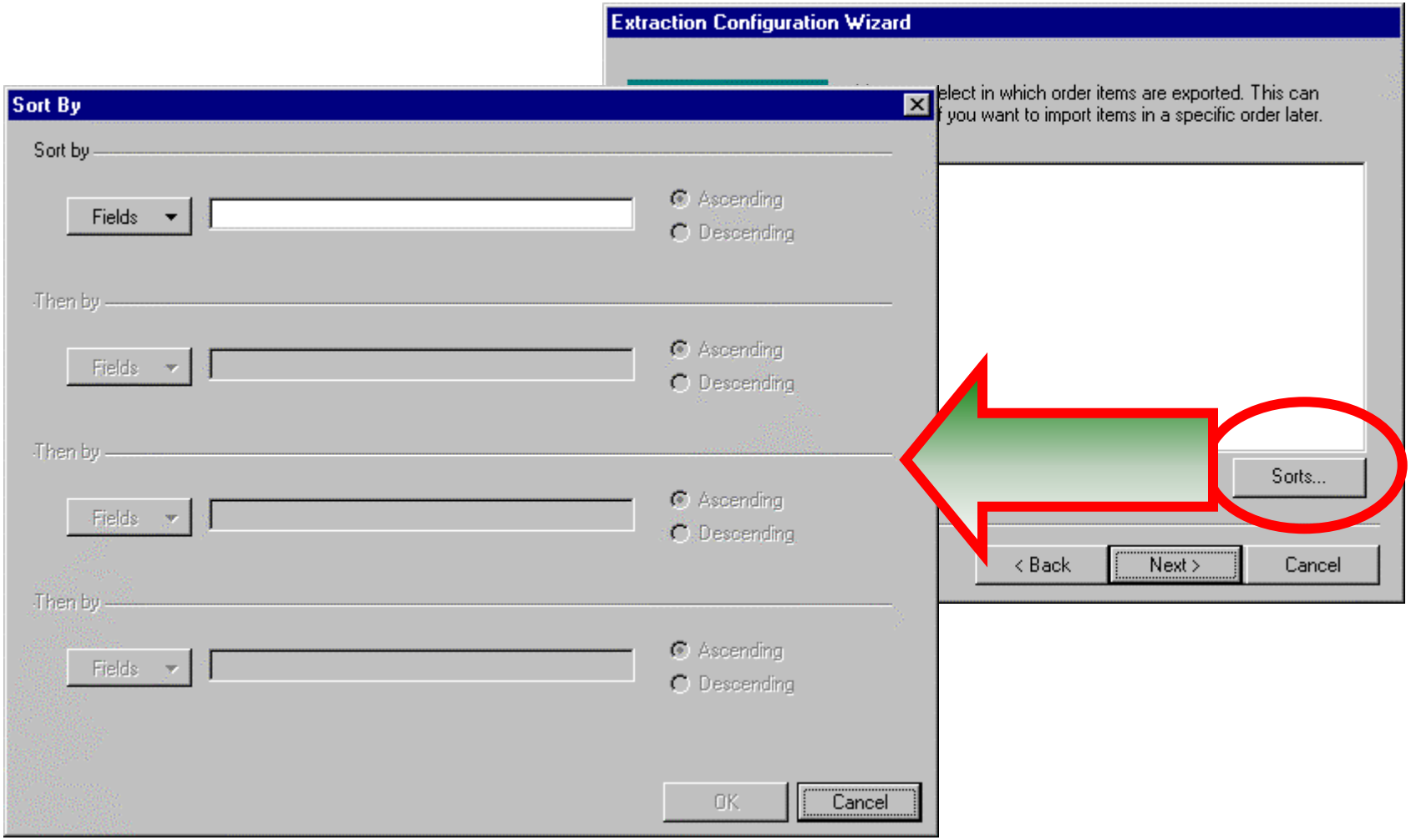
Extraction Configuration Wizard – Data Sort Order



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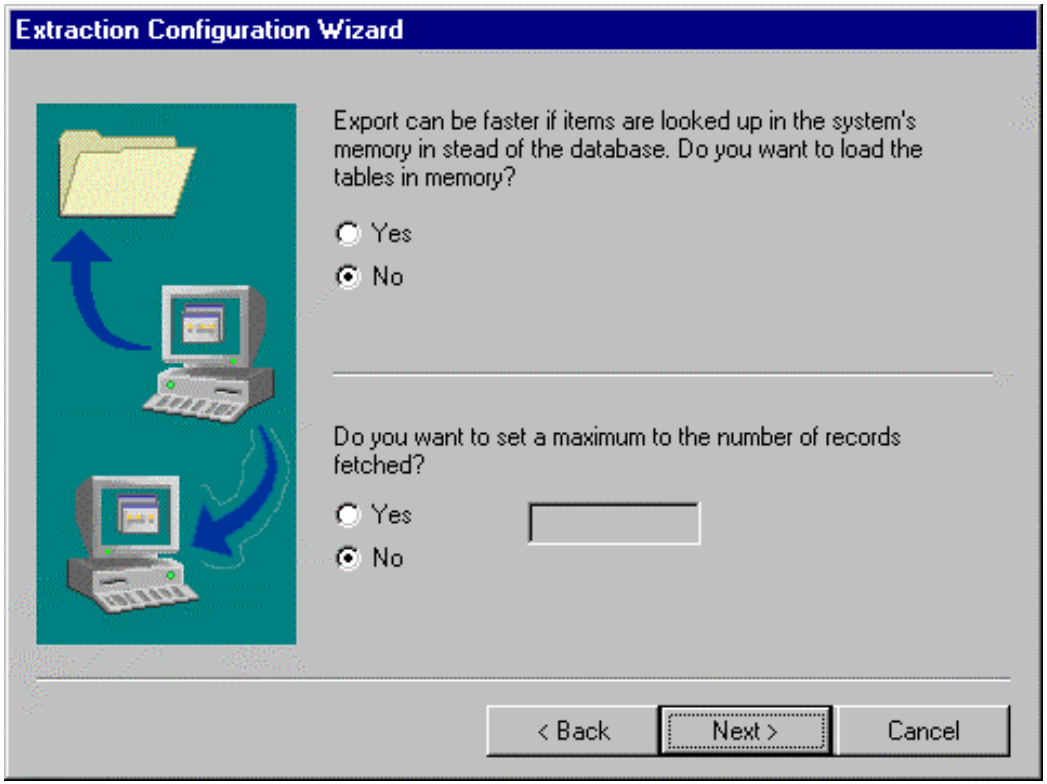
Extraction Configuration Wizard – Settings for Loading Classes



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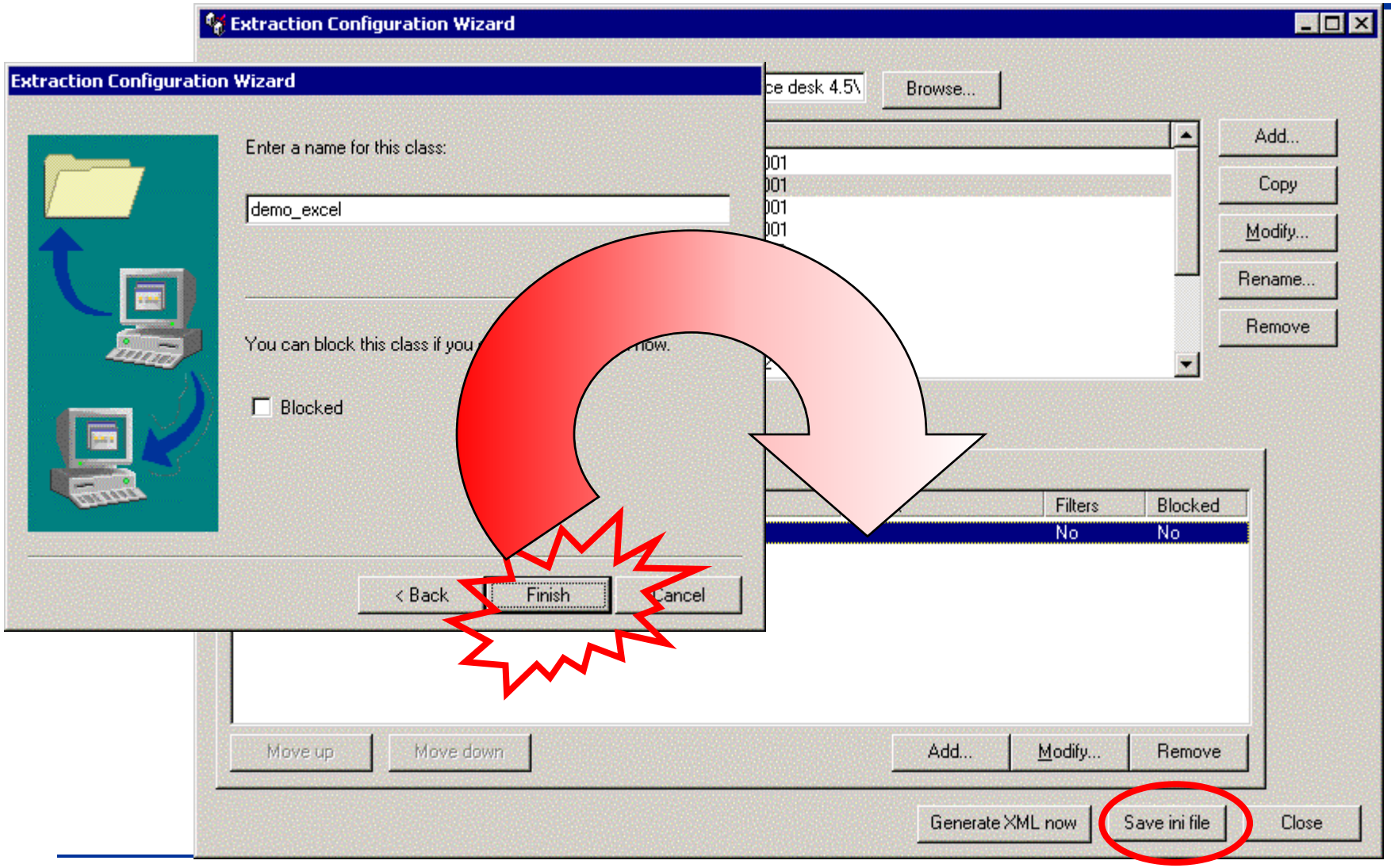
Extraction Configuration Wizard – Name and Block a Class



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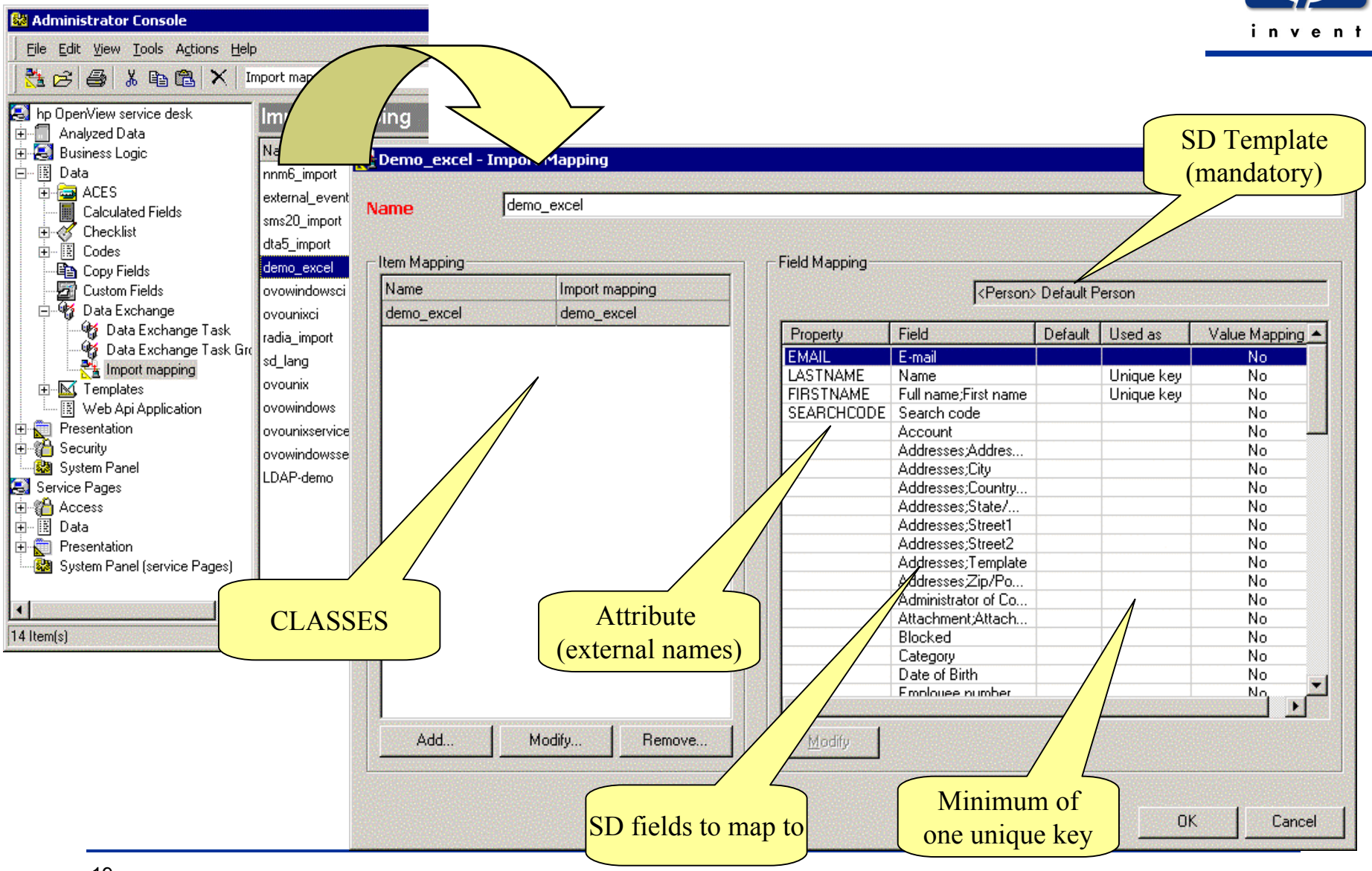
Import Mapping



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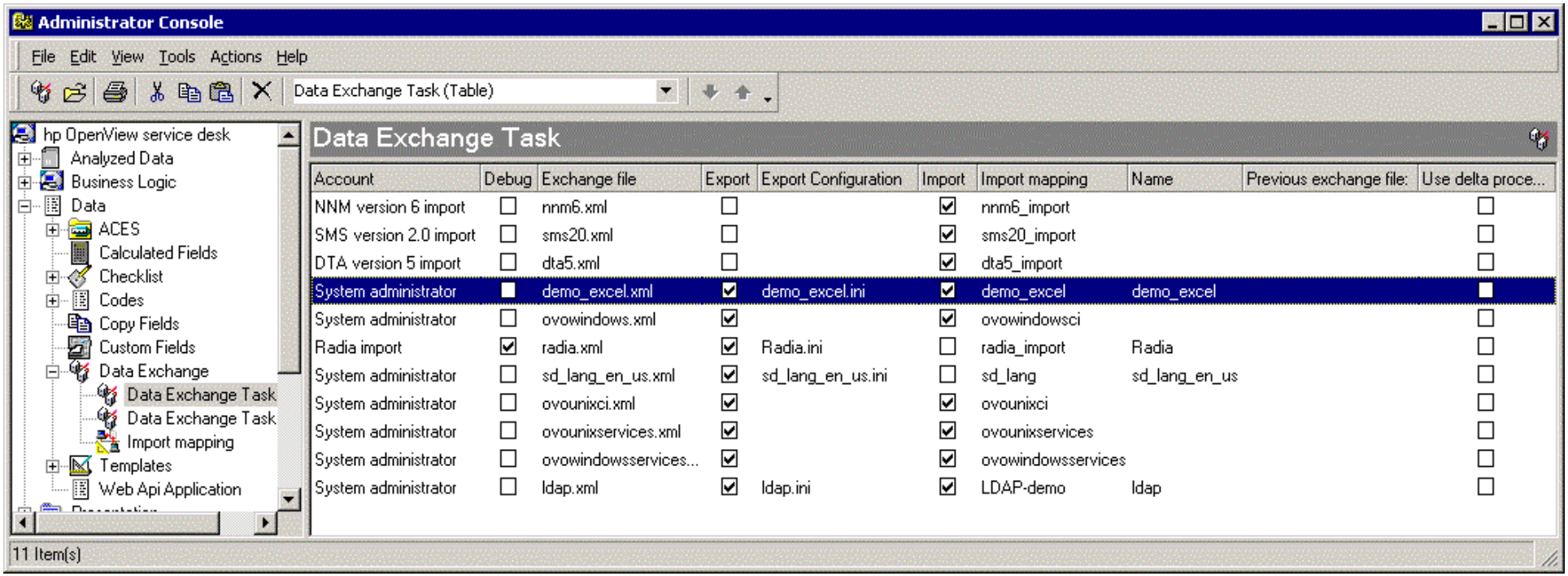
Exporting the Data – Data Exchange



Account	Debug	Exchange file	Export	Export Configuration	Import	Import mapping	Name	Previous exchange file:	Use delta proce...
NNM version 6 import	☐	nnm6.xml	☐		☑	nnm6_import			☐
SMS version 2.0 import	☐	sms20.xml	☐		☑	sms20_import			☐
DTA version 5 import	☐	dta5.xml	☐		☑	dta5_import			☐
System administrator	☐	demo_excel.xml	☑	demo_excel.ini	☑	demo_excel	demo_excel		☐
System administrator	☐	ovowindows.xml	☑		☑	ovowindowsci			☐
Radia import	☑	radia.xml	☑	Radia.ini	☐	radia_import	Radia		☐
System administrator	☐	sd_lang_en_us.xml	☑	sd_lang_en_us.ini	☐	sd_lang	sd_lang_en_us		☐
System administrator	☐	ovounixci.xml	☑		☑	ovounixci			☐
System administrator	☐	ovounixservices.xml	☑		☑	ovounixservices			☐
System administrator	☐	ovowindowsservices...	☑		☑	ovowindowsservices			☐
System administrator	☐	ldap.xml	☑	ldap.ini	☑	LDAP-demo	ldap		☐

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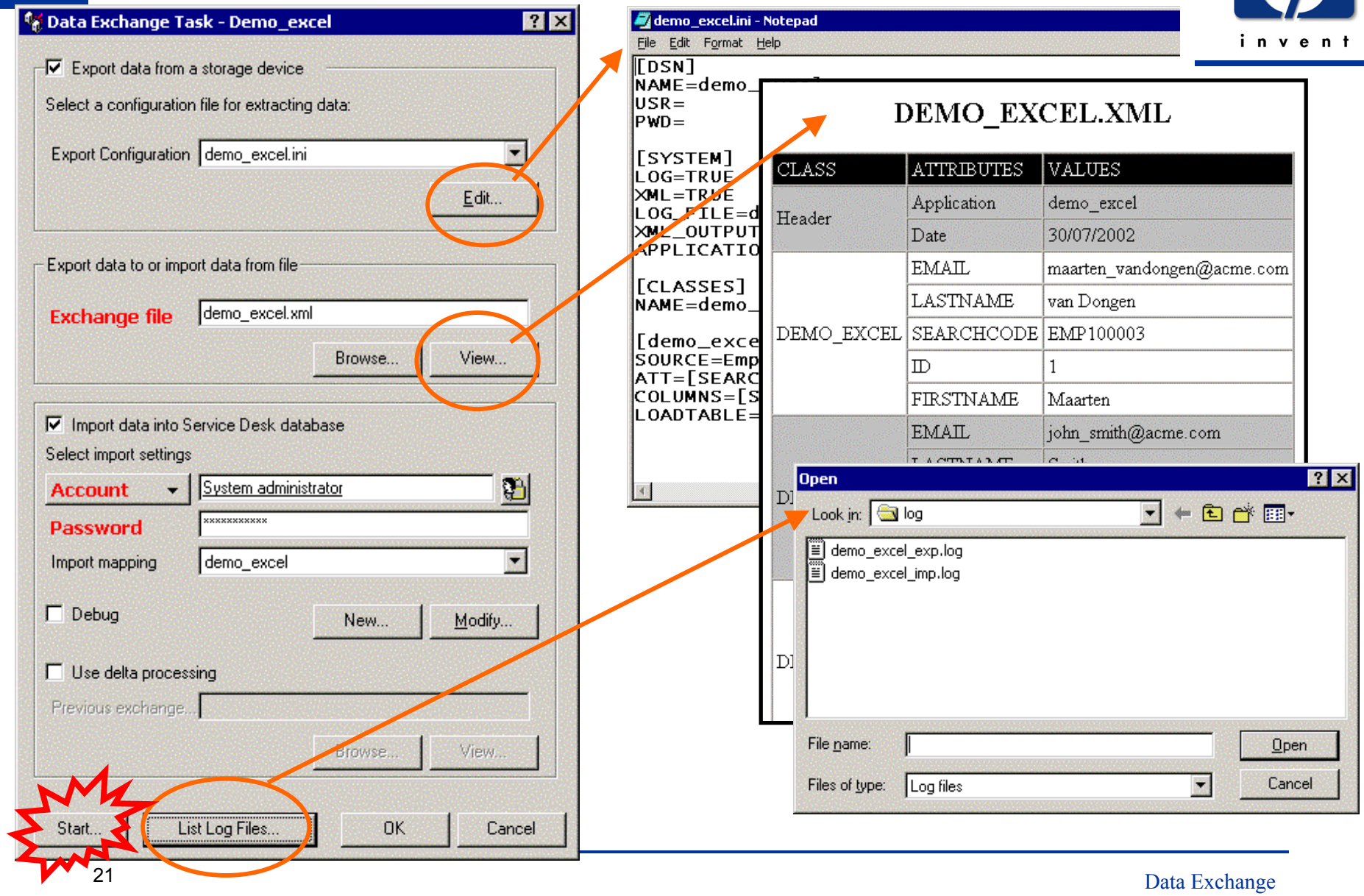
Data Exchange Task



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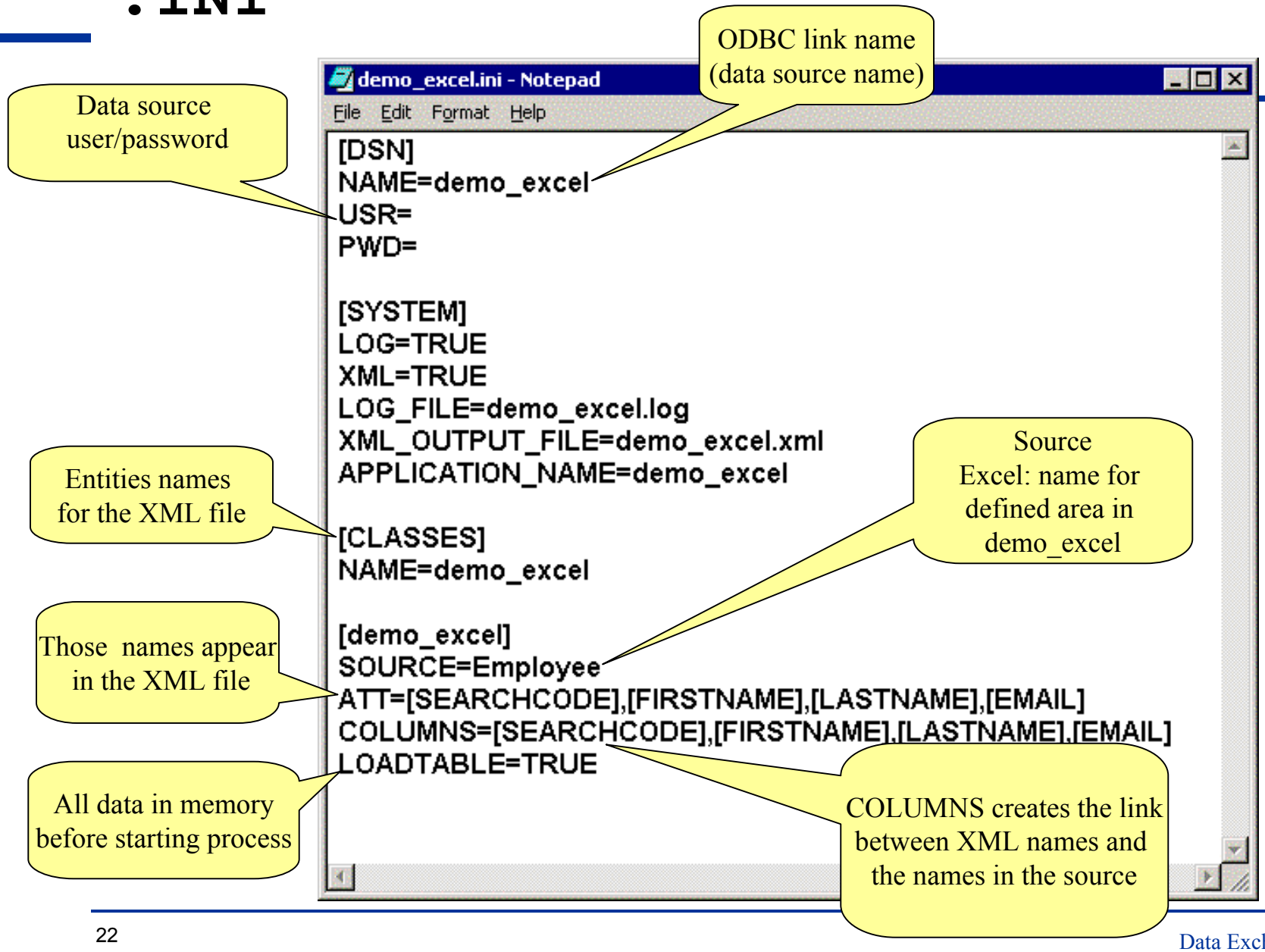
.INI



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.XML

DEMO_EXCEL.XML

CLASS	ATTRIBUTES	VALUES
Header	Application	demo_excel
	Date	30/07/2002
DEMO_EXCEL	EMAIL	maarten_vandongen@acme.com
	LASTNAME	van Dongen
	SEARCHCODE	EMP100003
	ID	1
	FIRSTNAME	Maarten
DEMO_EXCEL	EMAIL	john_smith@acme.com
	LASTNAME	Smith
	SEARCHCODE	EMP100004
	ID	2
	FIRSTNAME	John
DEMO_EXCEL	EMAIL	shelley_long@acme.com
	LASTNAME	Long
	SEARCHCODE	EMP100005
	ID	3
	FIRSTNAME	Shelley
DEMO_EXCEL	EMAIL	guy_francois@acme.com
	LASTNAME	FranÃ§ois
	SEARCHCODE	EMP100006
	ID	4

Classes column

Attributes column

Attribute value column

The ID is created while creating the XML file !

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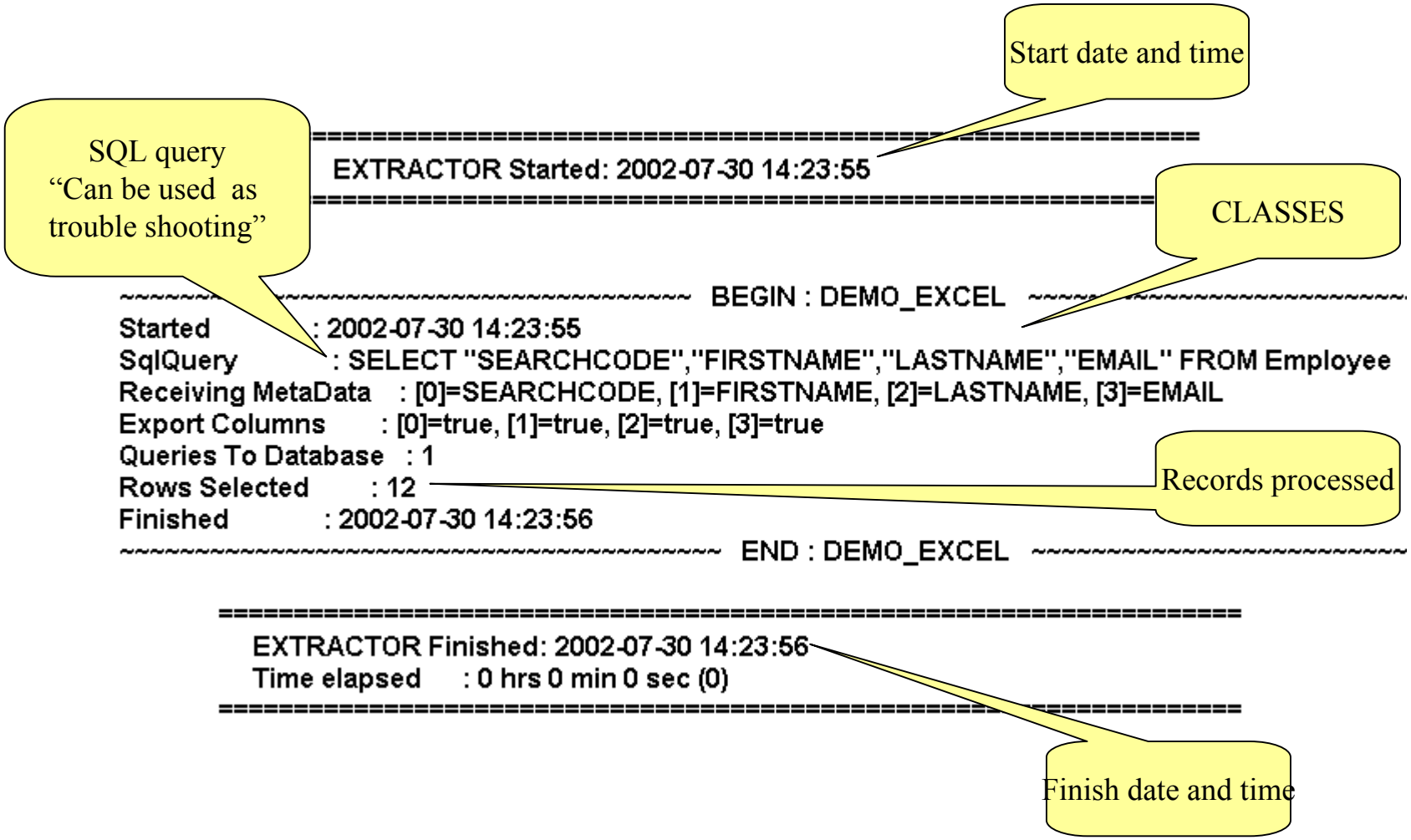
Export `.log`



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Import `.log`

```
==========================================================
        Starting HP OpenView Service Desk Import, version 1.2
==========================================================
Started at 7/30/02 2:23 PM
Import mappings set for demo_excel
Processing Xml file demo_excel.xml_1.xml
Reading data from XML file written at 30/07/2002 from demo_excel
Finished reading Xml file at 7/30/02 2:23 PM
Loading data from streams produced by previous step

Following problems encountered while loading entities:
=======================================================
Processing demo_excel (id = 1)
Processing demo_excel (id = 2)
Processing demo_excel (id = 3)
Processing demo_excel (id = 4)
Processing demo_excel (id = 5)
Processing demo_excel (id = 6)
Processing demo_excel (id = 7)
Processing demo_excel (id = 8)
Processing demo_excel (id = 9)
Processing demo_excel (id = 10)
Processing demo_excel (id = 11)
Processing demo_excel (id = 12)
=================================================
Finished loading entities at July 30, 2002 14:24


Following problems encountered while loading relations:
=======================================================
=================================================
Finished loading relations at July 30, 2002 14:24
=======================================================
        Succesfully completed HP OpenView Service Desk Import
        after 0 hrs. 0 min. 2 secs.
=======================================================
```

SD import startup info

SD Import result

SD Import error messages

SD Import finishing info

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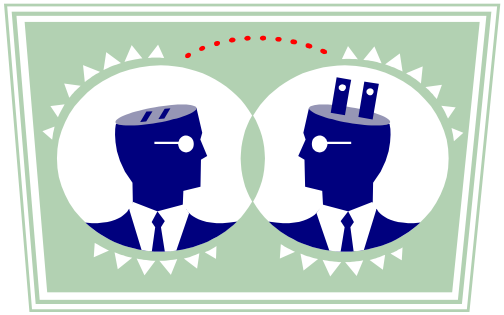
Data Exchange / Reconciliation

- Filters out redundant data by comparing two XML files and record the differences in a new XML file, which is then used for importing data. In this way only changed data is imported which speeds up the import process



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Data Exchange / Reconciliation Decision Matrix for Importing Items

Item in previous exchange file?	Item in current exchange file?	Changes to the item's attributes?	How is item processed?
No	Yes	Not Applicable	Import item
Yes	No	Not Applicable	Remove item manually
Yes	Yes	No	No action taken
Yes	Yes	Yes	Import item

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Data Exchange / Reconciliation Decision Matrix for Importing Relations

Item in previous exchange file?	Item in current exchange file?	Is the relation new or changed?	Has the relation been removed?	How will relation be processed?
No	Yes	Yes	Not Applicable	Import relation
Yes	No	Not Applicable	Yes	Remove relation manually
Yes	Yes	No	No	No action taken
Yes	Yes	Yes	No	Import relation
Yes	Yes	No	Yes	Remove relation manually

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Data Exchange / Reconciliation / Logfile

- The change log file that is created during delta processing lists:
  - new entities
  - updated entities
  - redundant entities
  - new relations
  - redundant relations

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Data Exchange / Reconciliation from commandline

- When starting reconciliation from the commandline you have the following benefits:
  - The option to disable the import step and only create the change list
  - The option to disable the creation of the time stamp as a part of the filename which will enable you to run the reconciliation periodically
  - The option to disable sorting which makes it faster

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hp OpenView service desk 4.5 Feature Pack – Service Pack 7 Functionality

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Agenda

- Functionality released after 4.5, before Feature Pack
- Feature Pack functionality:
  - Various usability improvements
  - Enhanced rule manager capabilities
  - Workflow calculation per work order
  - SLA impact assessment features
  - SD-OVO Unix integration improvements
  - Data Exchange with external system
- Requirements, upgrade strategy

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Functionality released after 4.5, before Feature Pack

- As separate products:
  - Tivoli EC – Service Desk integration
    - bi-directional event and CMDB integration
  - BMC Patrol – Service Desk integration
    - bi-directional event and CMDB integration
- With Service Pack 4:
  - “All Expanded” checkbox for tree views
  - Relate multiple Configuration Items to workorders in one go

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Various (usability) improvements

Overview:

- URLs in text fields
- Search enhancements
  - services
  - configuration items
  - caller/organization
- Automatic merge after a lock message
- Start actions from buttons
- Choose templates in a form
- Improvements to OVO Unix integration

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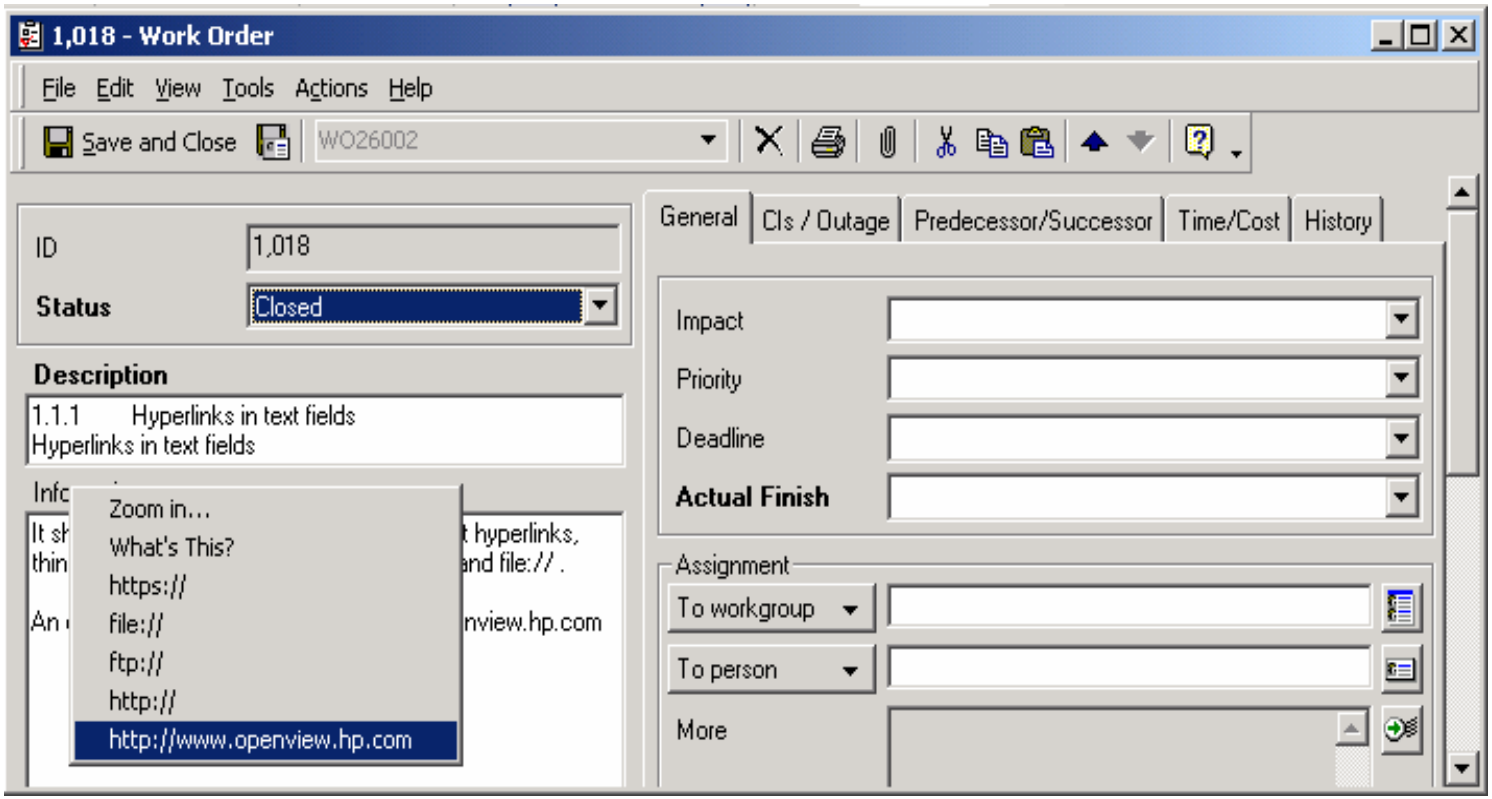
URLs in text fields

- URLs in text fields
  - URLs in SD text fields available and clickable from the text field pop-up menu

http://...
https://...
ftp://...
file://...
\\...



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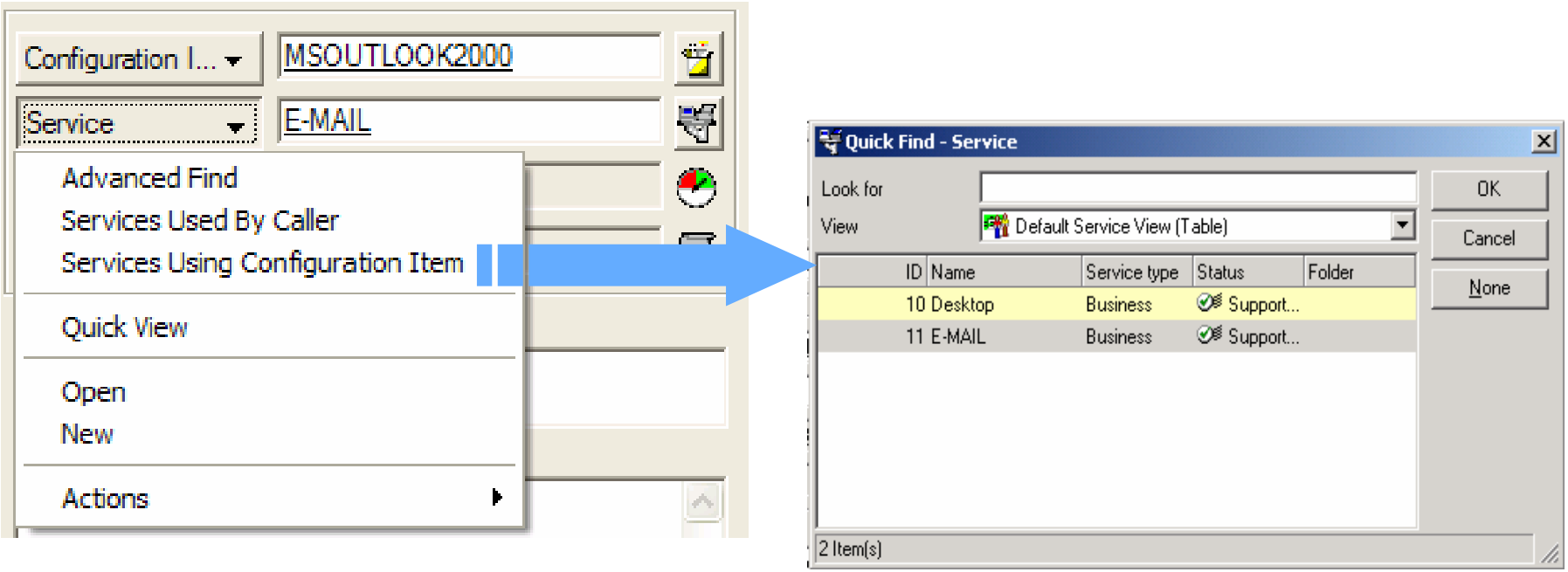
Services Using Configuration Item

- Search enhancements: Services Using Configuration Item



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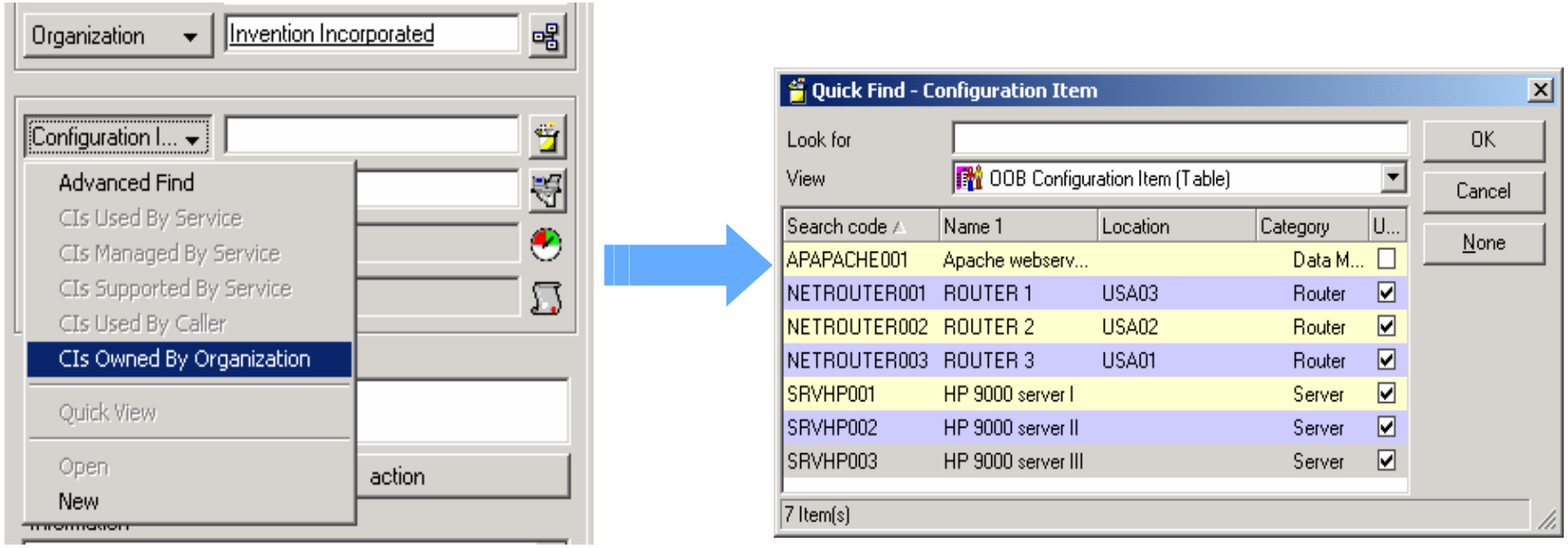
CIs Owned by Organization

- Search enhancements: CIs Owned by Organization
  - only CIs are selected where the Caller Organization is the Owner Organization of the CI
  - in combination with previous enhancement, services can be selected with the CI as starting position



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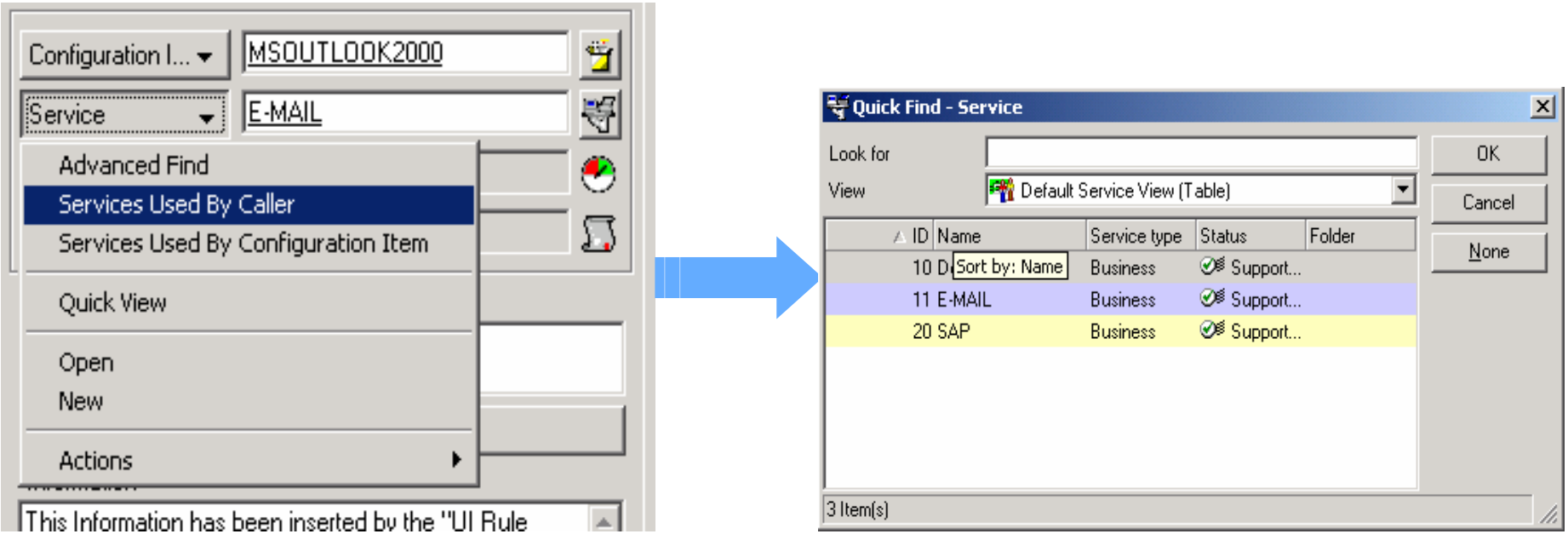
Services Used by Caller

- Search enhancements: Services Used by Caller
  - enables easy selection of services when Services pop-up menu has been disabled (previous slide)



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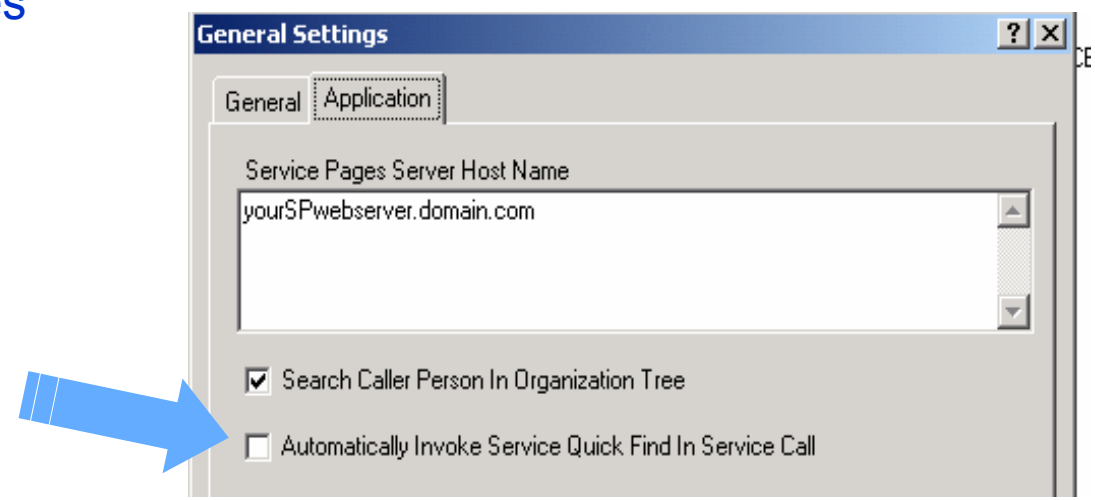
Disable Services auto pop-up window

- Search enhancements: Ability to disable Services auto pop-up window



  - previously upon caller or organization entry applicable services would be presented automatically in a pop-up window to be selected
  - now the automatic pop-up can be disabled in the System Panel
  - facilitates selection of service on basis of CI
  - applies only to service calls

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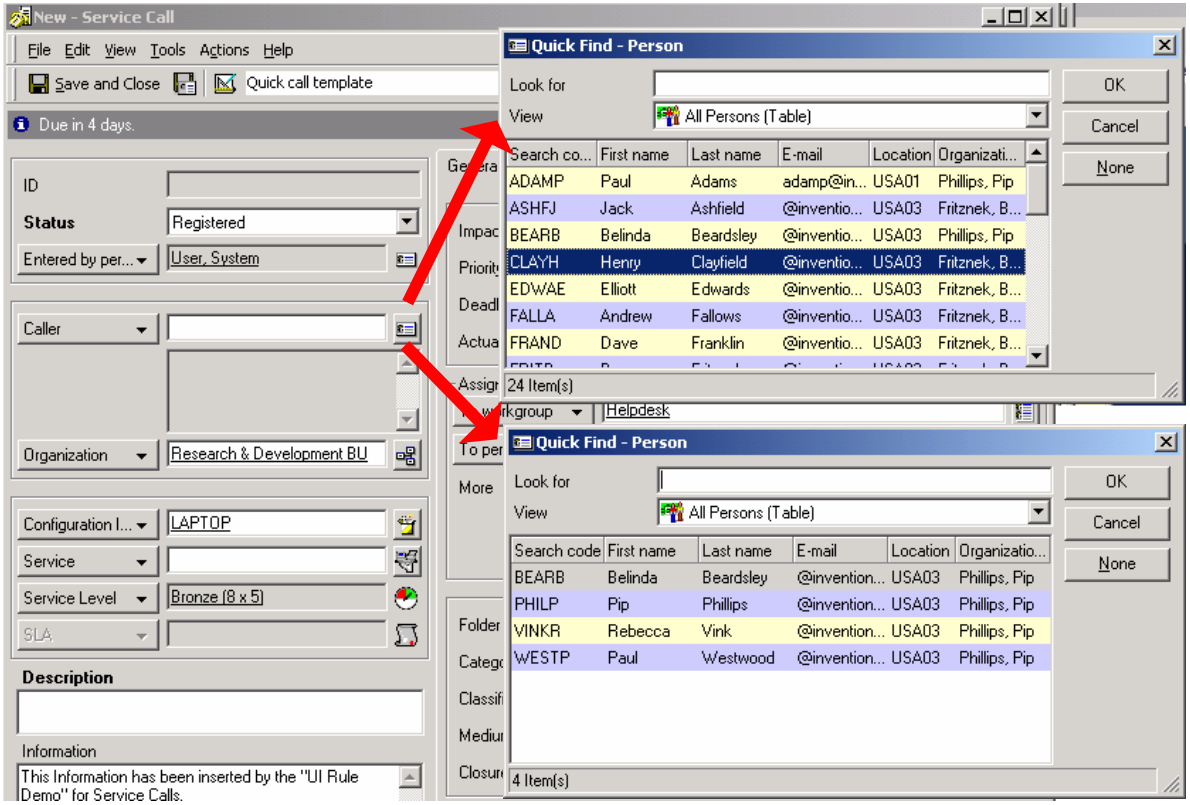
Caller look-up choices

- Search enhancements: Caller look up through organizational hierarchy



Option Enabled

Option Disabled

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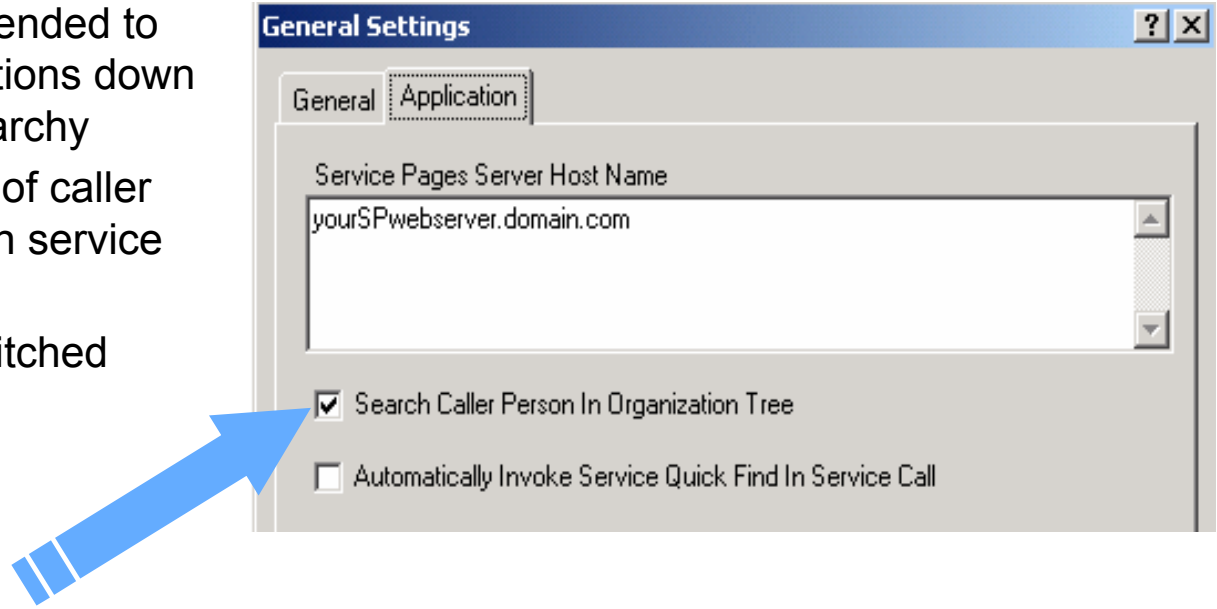
Search Caller Person in Organization Tree

- Search enhancements: Caller look-up through organizational hierarchy

  - previously search for caller from caller field looked at current organization only
  - now search can be extended to persons in all organizations down the organizational hierarchy
  - applies to combination of caller and organization field in service calls only
  - functionality can be switched on/off in System Panel



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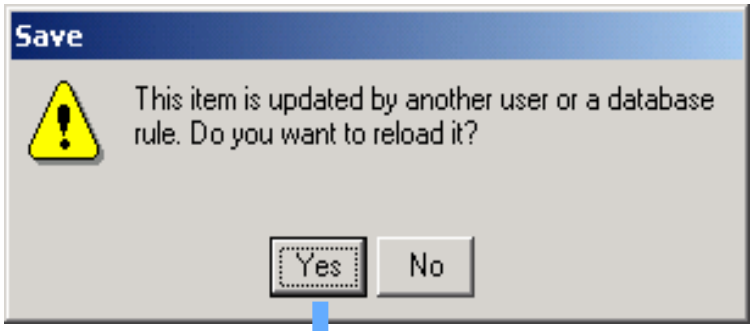
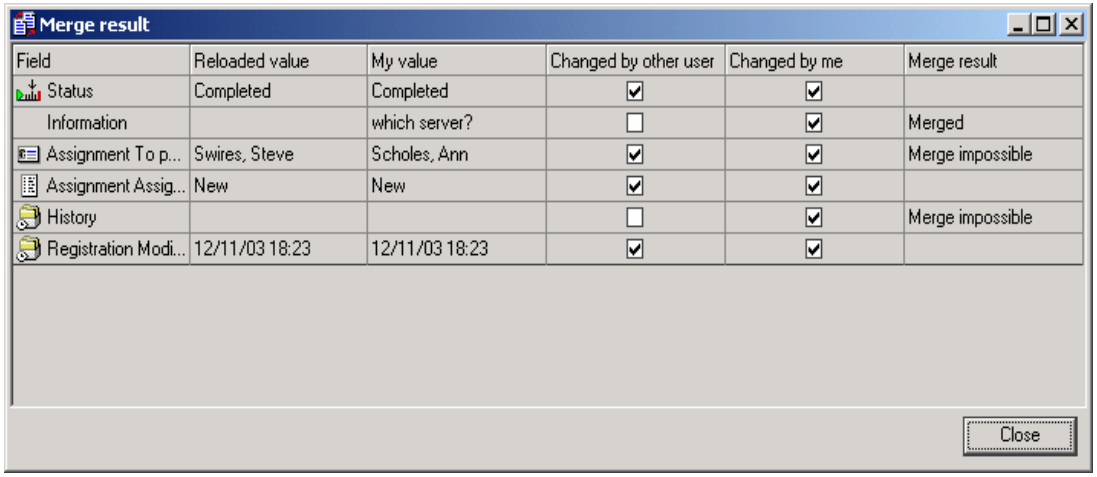
Automatic merge after a lock - Message

- Automatic merge after a lock message
  - SD uses optimistic locking
  - previously, when 2 records were open simultaneously and changes were made, the last saver needed to add changes manually
  - now SD tries to merge the two records automatically whenever possible
  - user must approve the automatic merge





Field	Reloaded value	My value	Changed by other user	Changed by me	Merge result
Status	Completed	Completed	☑	☑	
Information		which server?	☐	☑	Merged
Assignment To p...	Swires, Steve	Scholes, Ann	☑	☑	Merge impossible
Assignment Assig...	New	New	☑	☑	
History			☐	☑	Merge impossible
Registration Modi...	12/11/03 18:23	12/11/03 18:23	☑	☑	

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Automatic merge after a lock - Matrix

- Automatic merge after a lock message MATRIX
  - How fields are merged?

Situation	Which user's field is taken
The other user changed a field and I did not	Other's
I changed a field and the other user did not	Mine
I changed a field and the other user changed the same field to a different value	No automatic merge possible, other's value
I changed a field and the other user to the same value	Other's (they are equal)
I changed a field that holds a list of other objects (e.g. Work orders, History lines)	No automatic merge possible

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Merge result

- Automatic merge after a lock message, then “Merge result” window

Merge result

Field	Reloaded value	My value	Changed by other user	Changed by me	Merge result
Status	In Progress	Registered	☑	☐	
Description	Connection to intern...	Connection to intern...	☑	☑	Merge impossible
Information	No info yet		☑	☐	
Assignment ...	Web Specialists	Helpdesk	☐	☑	Merged
History			☐	☑	Merge impossible
Registration ...	08/01/04 16:37	08/01/04 16:38	☑	☑	

Close

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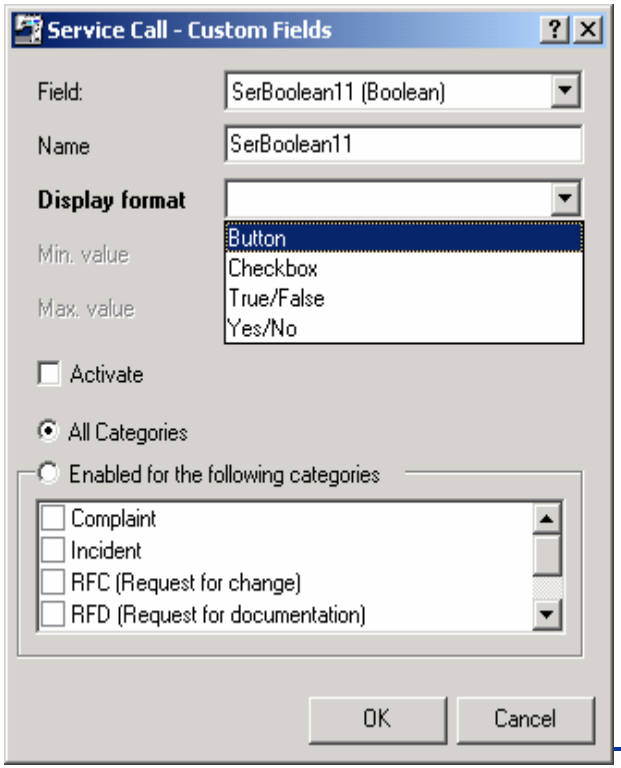
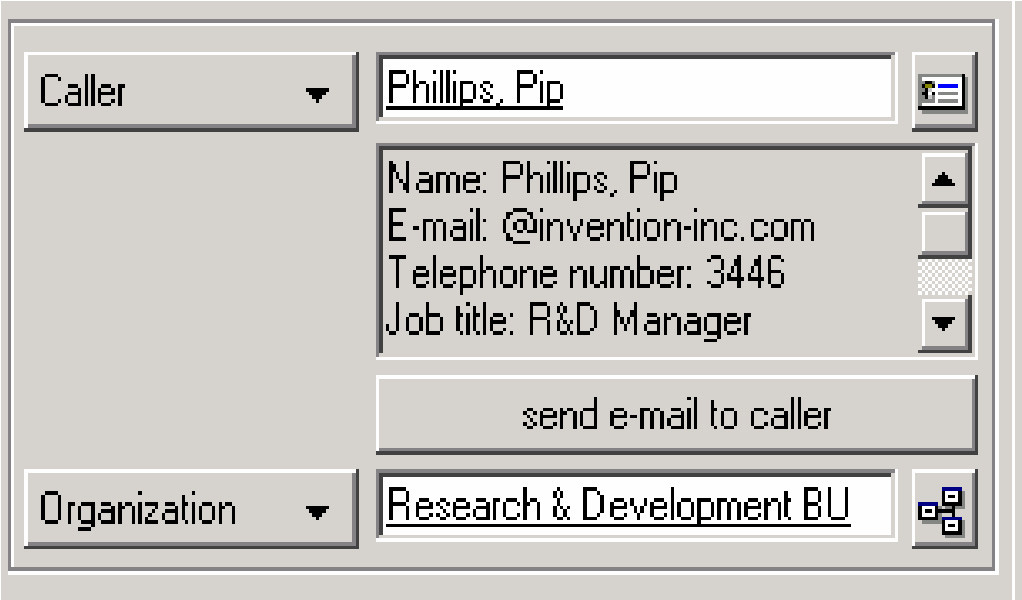
Start actions from buttons

- **Start actions from buttons**
  - Custom Boolean fields can now be of type **'button'**
  - **UI rule** can be defined to **trigger** on clicking the button
  - Each entity now has **10** additional custom Boolean fields





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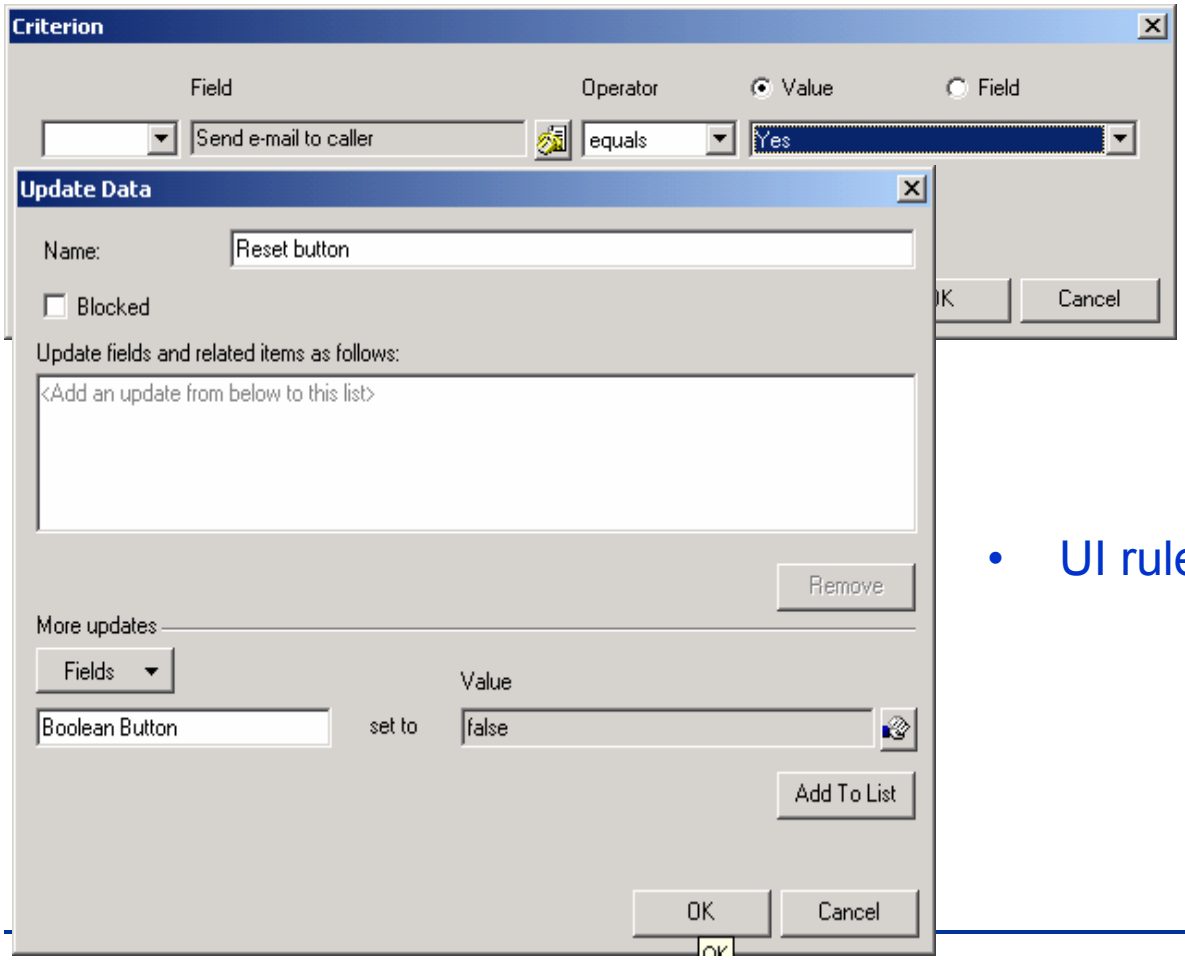
Reset action buttons with UI Rule



- UI rule condition
- UI rule reset button action

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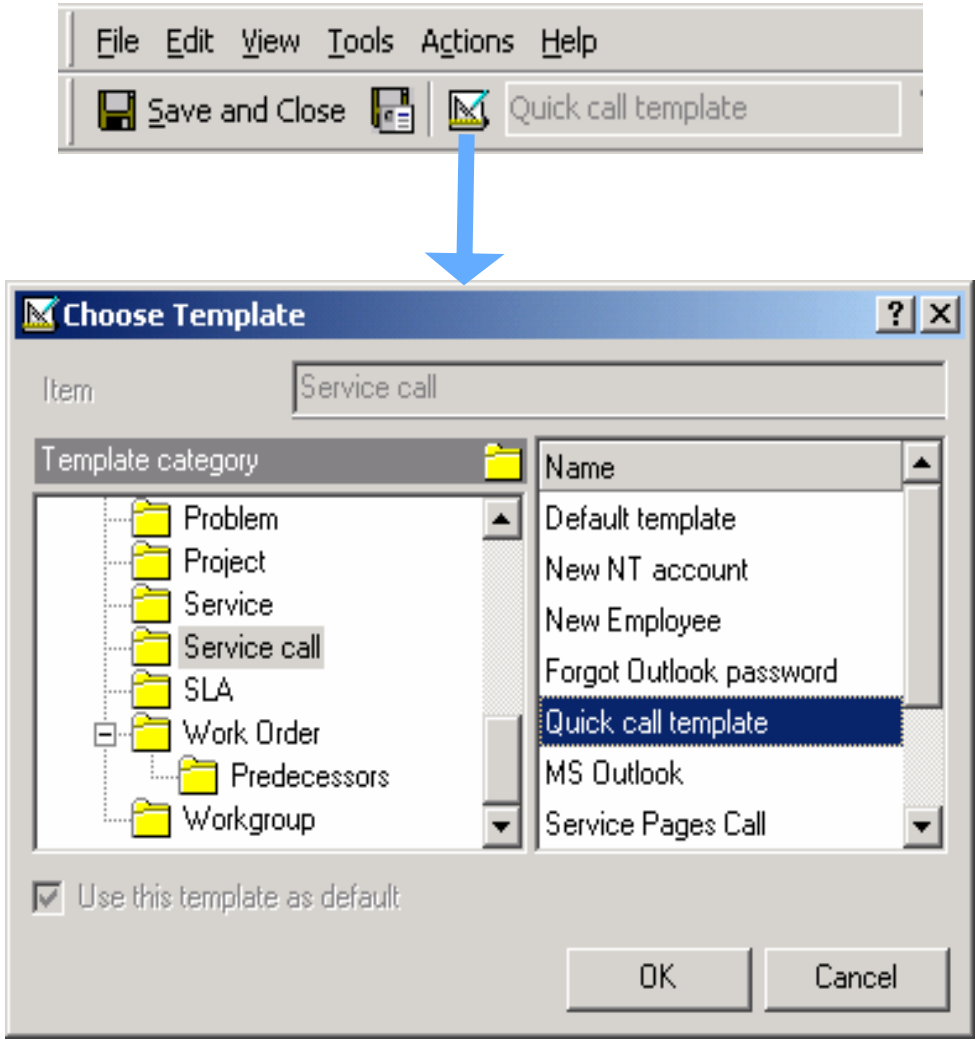
Choose templates in a form

- Choose templates in a form
  - templates can be selected from a dialog window
  - enables easier selection in case of many templates
  - can be switched on/off in the System Panel



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Enhanced rule manager capabilities

Overview:

- UI rules firing on opening or saving a form
- Rule conditions
  - logical expressions and compounds
  - variables
  - field has changed check
  - field to field comparison
- New action: User Notification message
- Update Data action enhancements
  - parsing, trimming, substituting, converting, concatenating, calculating

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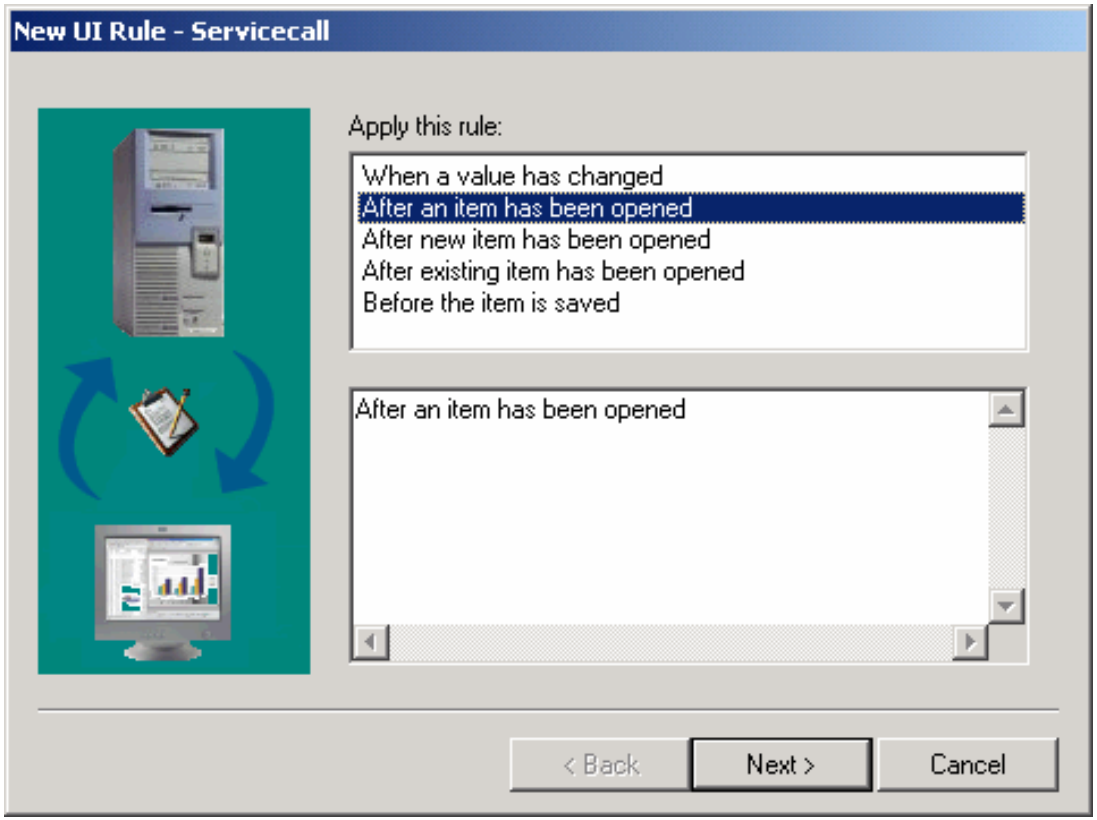
UI rules firing on opening or saving a form

- UI rules firing on opening or saving a form



  - enables pre-open check on data e.g. to limit field values
  - enables pre-save check on data e.g. to enforce certain user behavior

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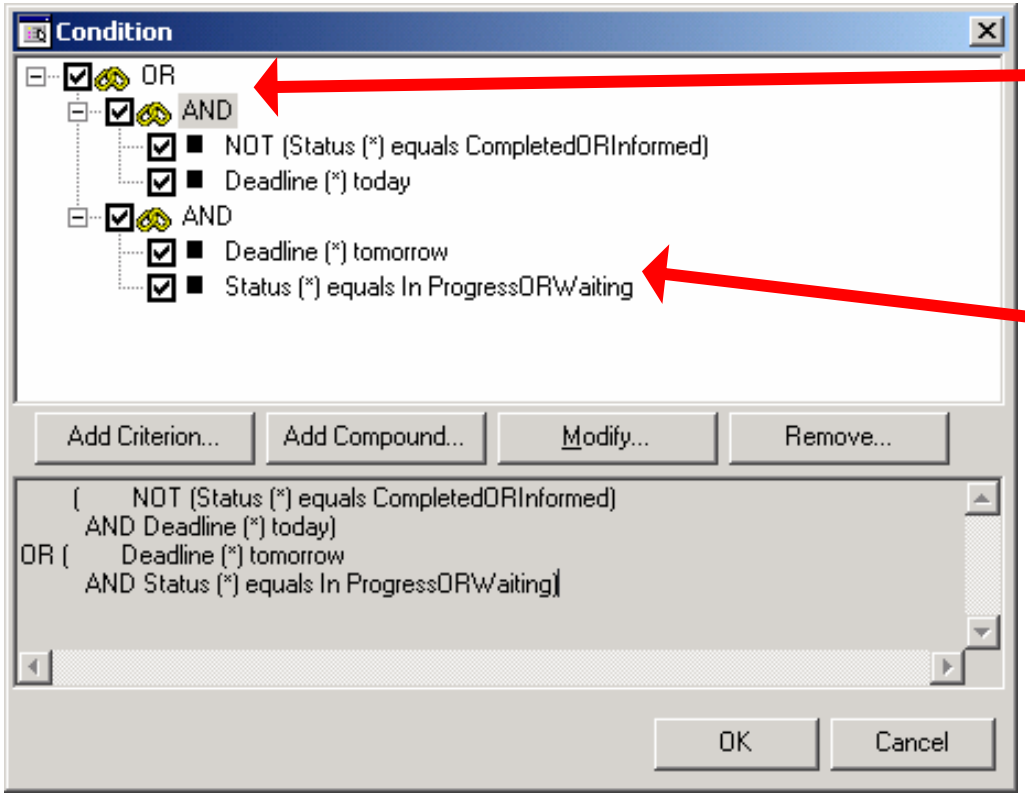
Logical Expressions and Compounds (1)

- Rule conditions: logical expressions and compounds



- Compounds
  - And, Or and Negate
- Conditions
  - Criteria and Negate

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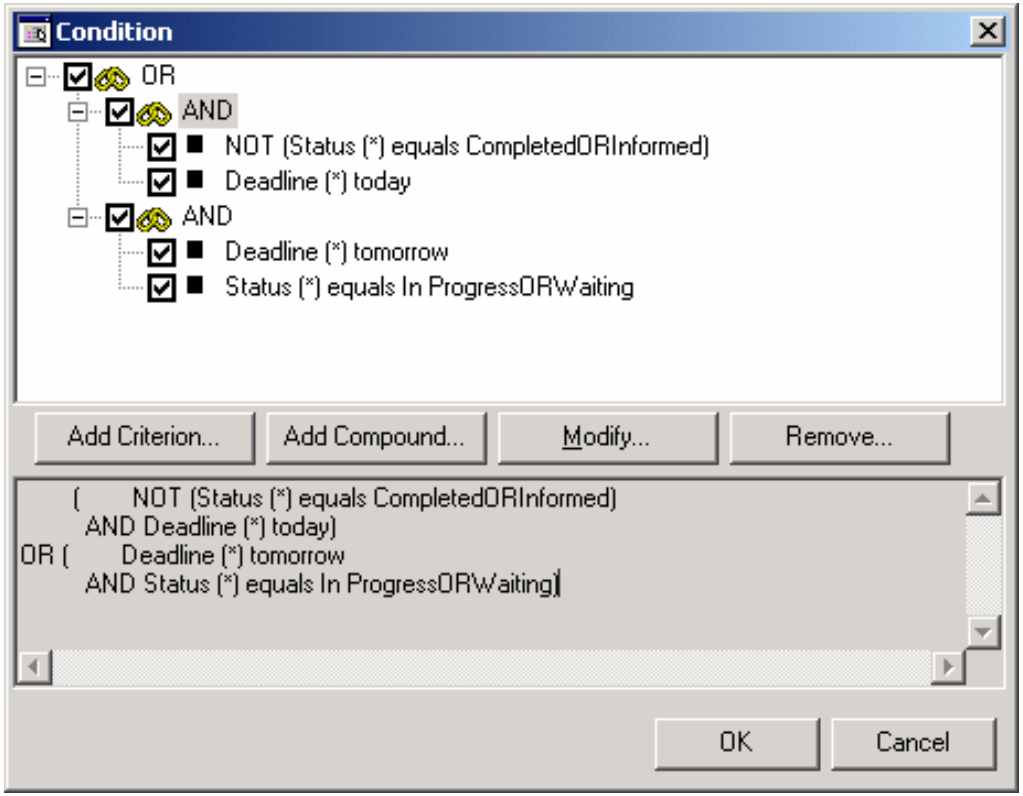
Logical Expressions and Compounds (2)

- Rule conditions: logical expressions and compounds



- previously all conditions were implicitly AND conditions
- now AND, OR and NOT can be used
- conditions can be compounded
- tree view for building an expression, drag&drop enabled
- show view to display the expression in a logical way

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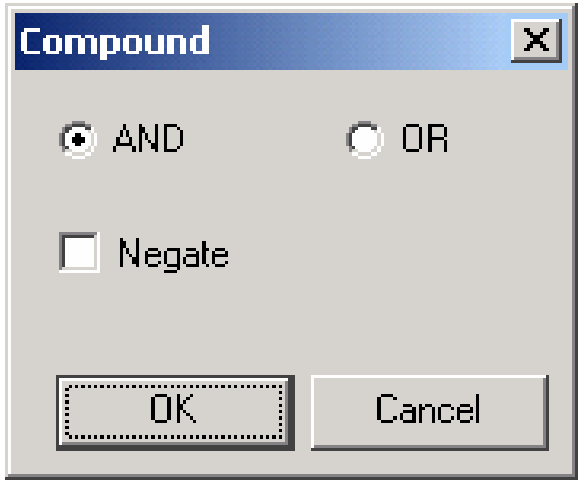
Add compound

- Add compound



- Compounds consists of two or more sub conditions
  - Criteria
  - Other compound
- AND
  - means that all this condition is only true when all sub conditions are true
- OR
  - means that this condition is true when at least one sub condition is true.
- Negate
  - Means that a compound condition be logically negated

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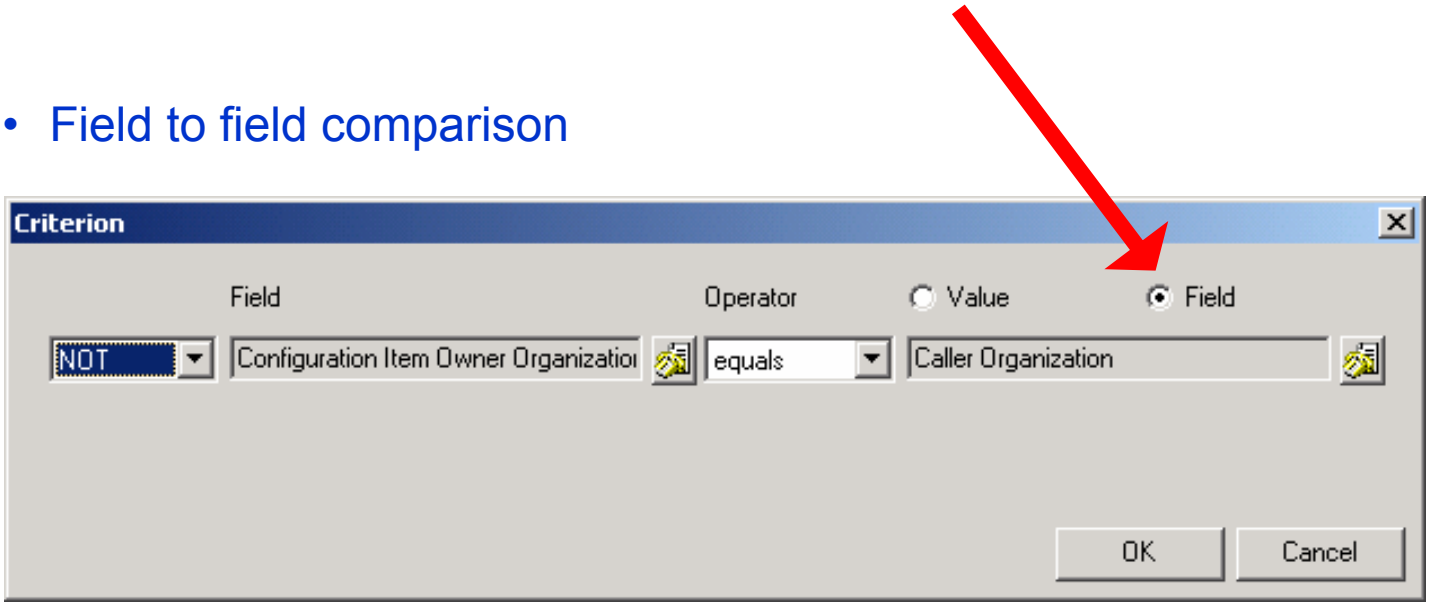
Field to Field Comparison

- Field to field comparison



  - enables comparison of field values (must have same field type)
  - previously only comparisons to fixed values were possible

Example: Check whether the caller's organization is actually the owner of the Configuration Item involved

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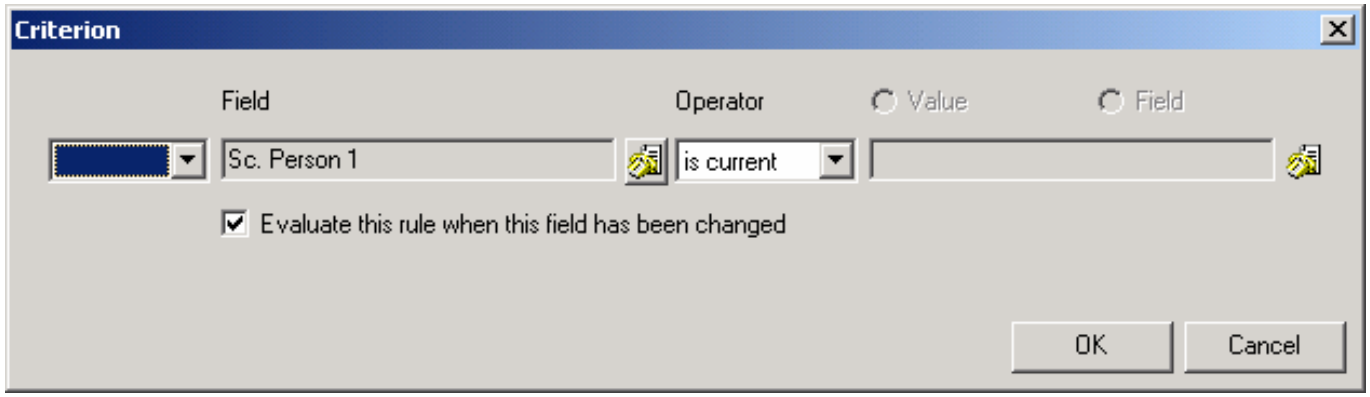
Is Current Operator

“Is Current” Operator:



- Operator available for Person and Account
- Three locations:
  - ✓ UI rule
  - ✓ Advance find
  - ✓ View filter
- Related: “set to current” in the Update Data Action

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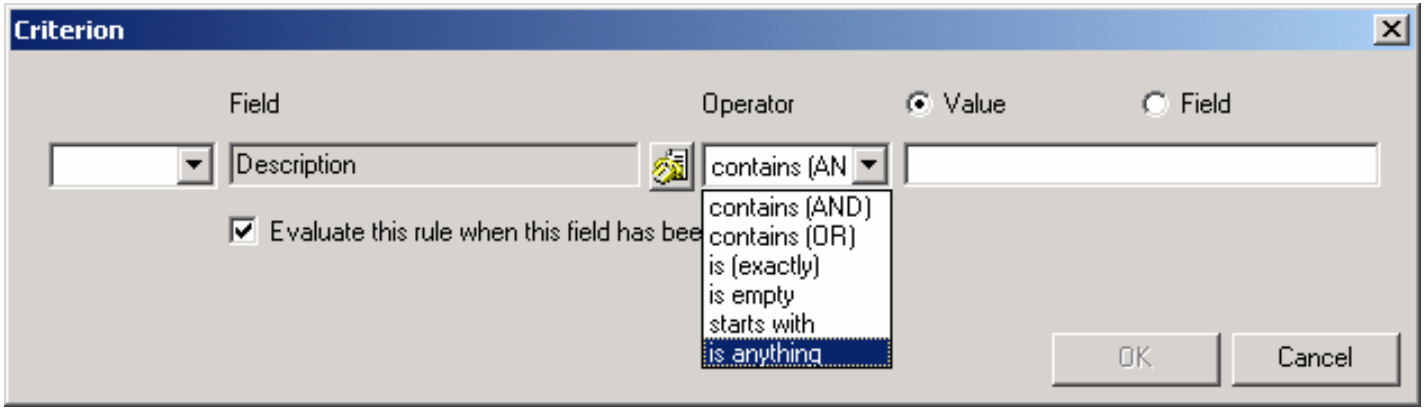
Is Anything Operator

- "Is Anything" Operator



  - makes triggering possible over multiple conditions for UI rules
  - features new operator **"is anything"** which enables triggering the rule irrespective of the new value for any field
  - replaces trigger condition for UI rules

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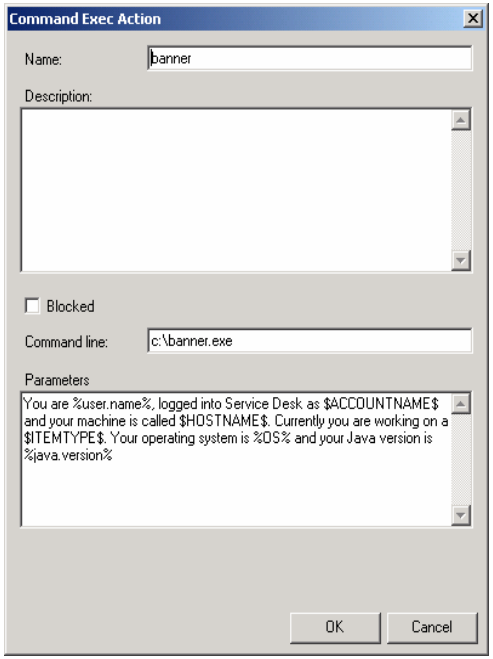
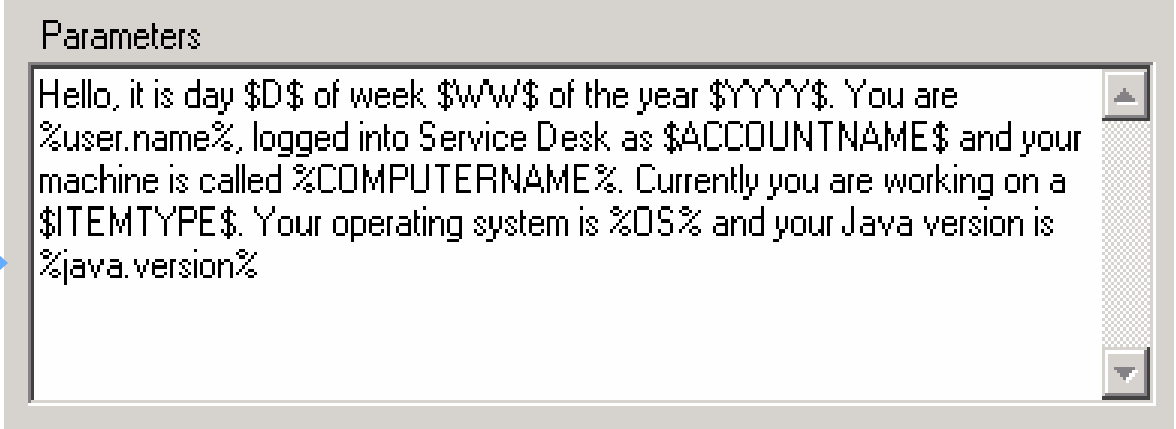
Variables





Service Desk and Java Variables cannot be created but OS variables can

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Variables options

- **Variables options:**
  - Right hand side of
    - a criterion in a View filter and in Advanced Find
    - an Update Data action
  - Parameter field of a
    - Command Exec action
    - Smart Action
    - Update data from an external system action
  - Subject or message of an Email action
  - Message of an User Notification Message action
  - Confirmation texts of the Inbound Email integration

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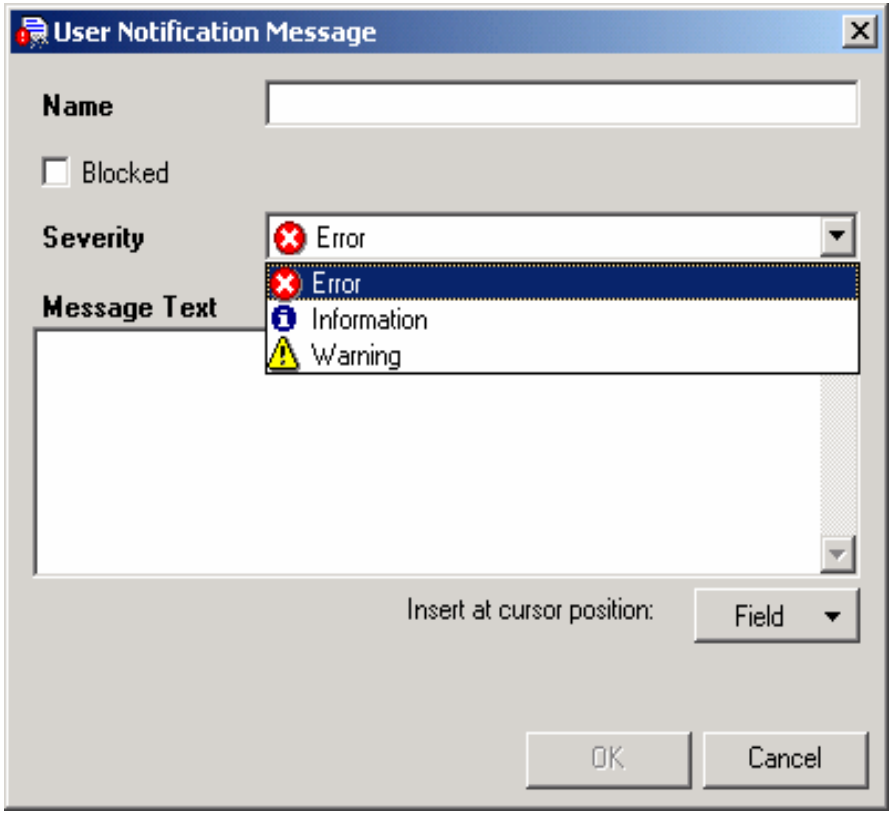
User Notification Message for UI Rules

- New action: User Notification Message for UI rules
  - enables notification of UI user based upon user actions
  - enables enforcement of correct data entry
  - features three levels of notification:
    - Information: no enforcement
    - Warning: possibility to ignore
    - Error: only abort option
  - applicable for UI rules triggered upon opening and saving a form



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User Notification Message for UI Rules Example

- New action: User Notification Message for UI rules example:

  make field value entry mandatory based on value of any other field
  - UI rule for service calls that is triggered upon save
  - Conditions:
    - Service call category is RFI (Request For Information)
    - Information field “is empty”
  - Error message notification informing user:
    - In case of an RFI, the Information field needs to be filled in

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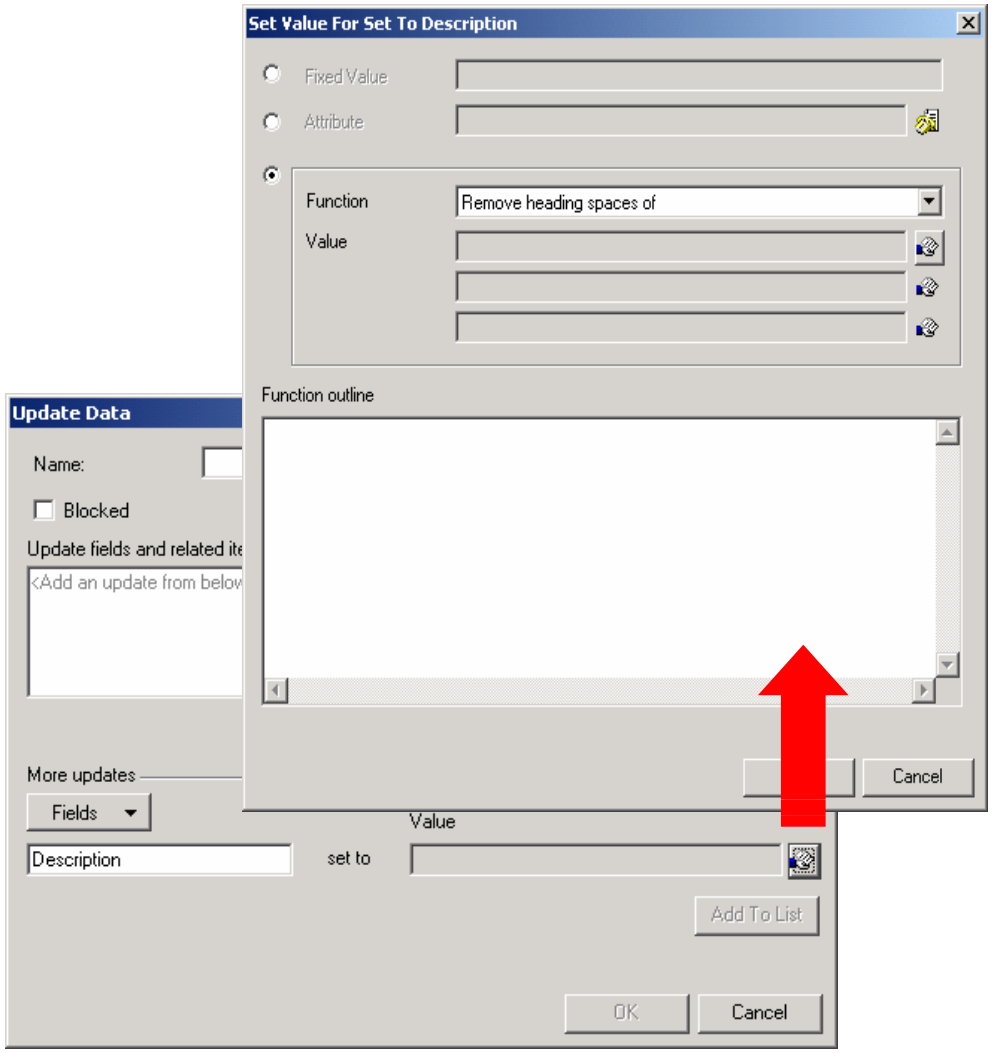
Update Data Action Enhancements

- **Update Data action enhancements:**
  - Attribute
  - Function
    ! Can open a new set value
    Screen (nesting)
  - The first action depends on the field selected in the update date screen:
    - Fixed Value
    - Caller
    - Etc……



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Options for Strings, Numbers, and Dates

- **Update Data action enhancements**
  - options for strings:
    - Parse only a specific number of characters of the property value from the left/right;
    - Remove a specific number of characters from the property value from the left/right;
    - Remove heading/trailing space characters from property value;
    - Substitute any string in the property value by another;
    - Concatenate two values;
    - Convert all characters in a property value to upper/lower case
    - Count characters
  - options for numbers:
    - Add to/subtract from/multiply by/divide by of the property value by/with another value
  - options for dates:
    - Add to/subtract from a time span from a date in a resolution from days to minutes;
    - Subtract dates from each other
    - Add to/subtract from current date

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Update Data Action Enhancement Examples

- Update Data action enhancements: example uses ...
  - create information log fields by concatenation including time stamp and user stamp
  - make time/date calculations to register the open time on a call form
  - edit events/data from external systems

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Data Exchange with External System

Overview:

- Data exchange with External System
  - New UI and Database Rule action
  - HTTP requests to external system

- Enables on-line retrieval of external data from within a Service Desk form, such as:
  - Knowledge bases
  - Personnel & Organization applications

- May be used instead of Service Desk agents for some integrations

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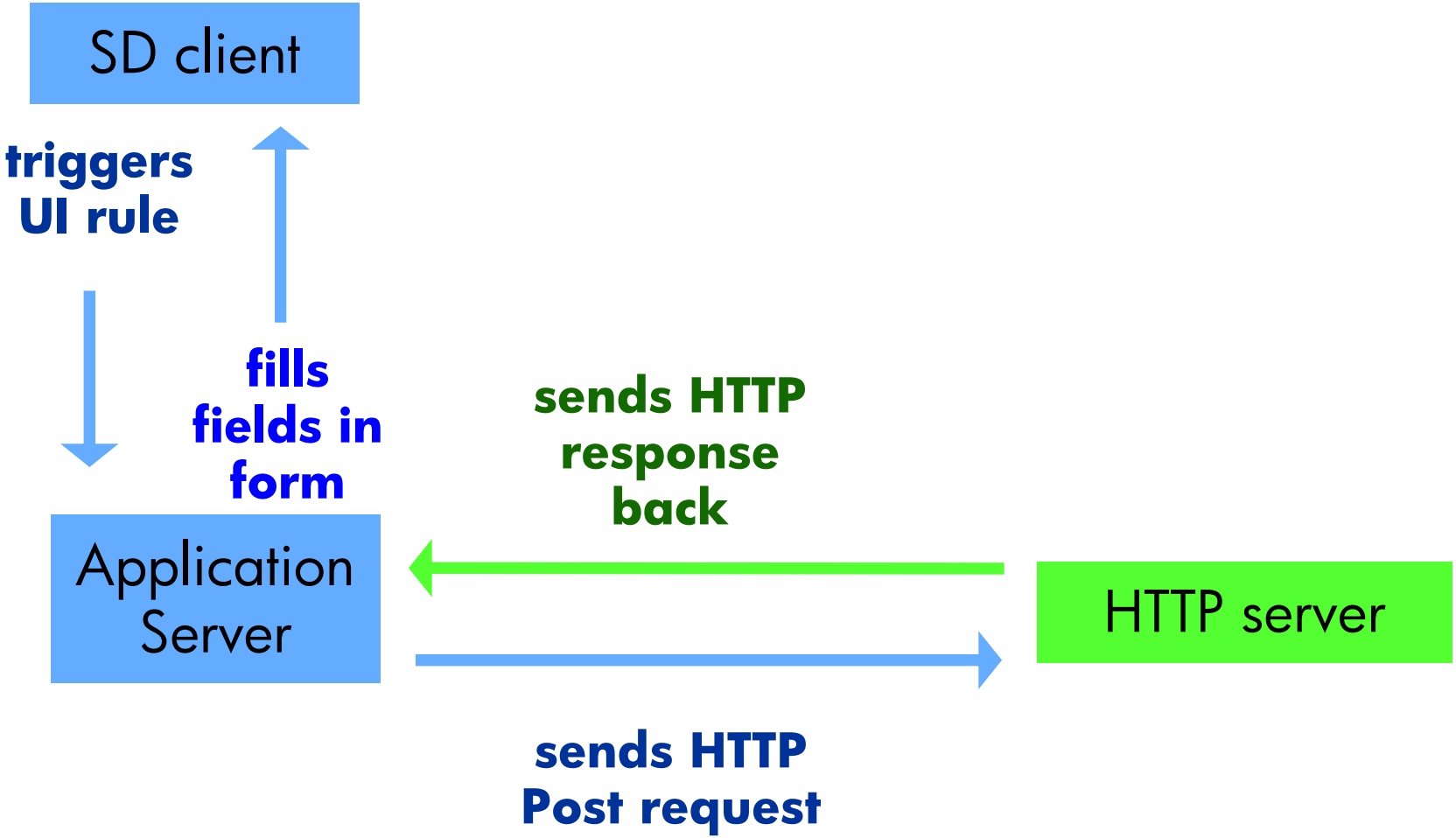
Data Exchange with External System Flow



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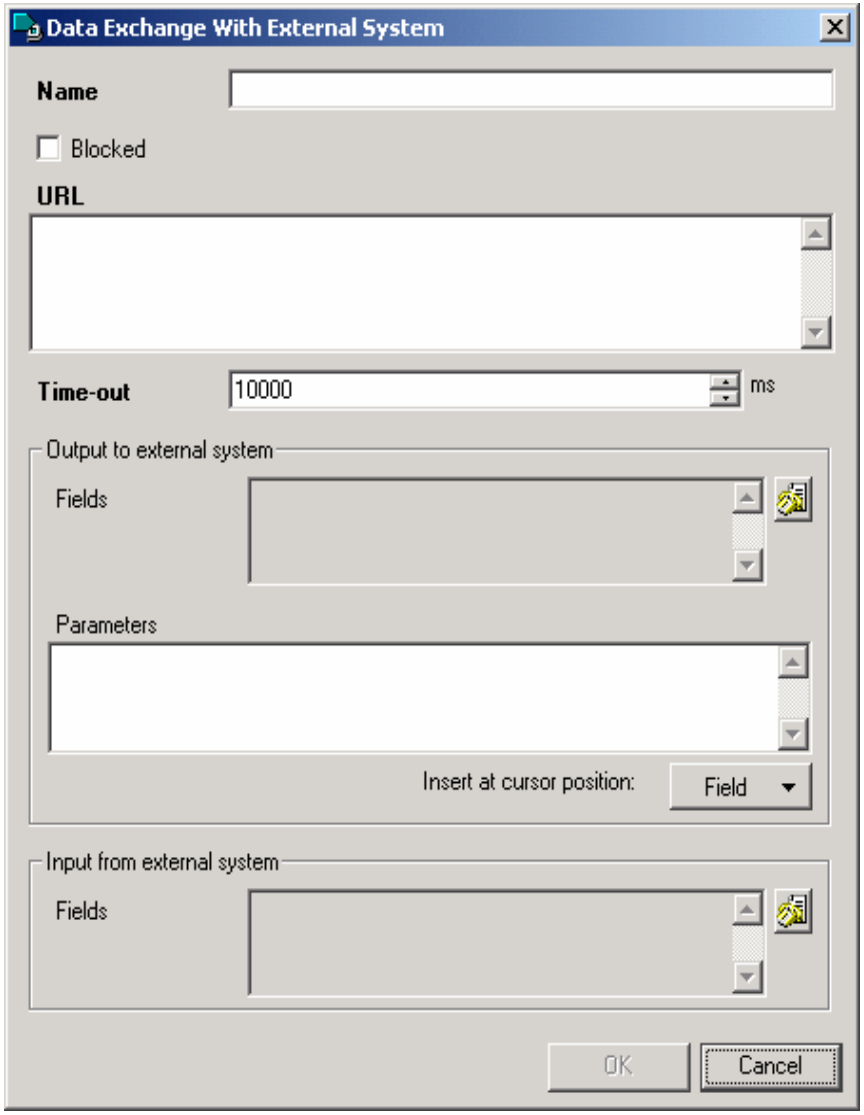
Data Exchange with External System Configuration



- give URL to send request to
- set time-out (to not let user wait indefinitely for a HTTP server that is down
- define output to external system (fields and parameters)
- define expected input from external http server (fields)

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SLA impact assessment features overview

- SLA impact assessment enables identification of impacted services and customers due to service degradations and failures. It ...
  - enhances the ability for the help desk operators to determine priorities
  - facilitates communication to end users about services impacted (or potentially impacted) by incidents

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SLA impact assessment features

- SLA impact assessment features:
  - A Services view showing the Services potentially impacted by an Incident or Service Call based on the value for CI, Service or both
  - Deadline Service, a new standard attribute for Incidents and Service Calls that shows the name of the Service from which the Deadline was calculated
  - Service Level Weight attribute for Service Levels to set an order of importance to be used as a sort key in the new Services view in case of identical deadlines

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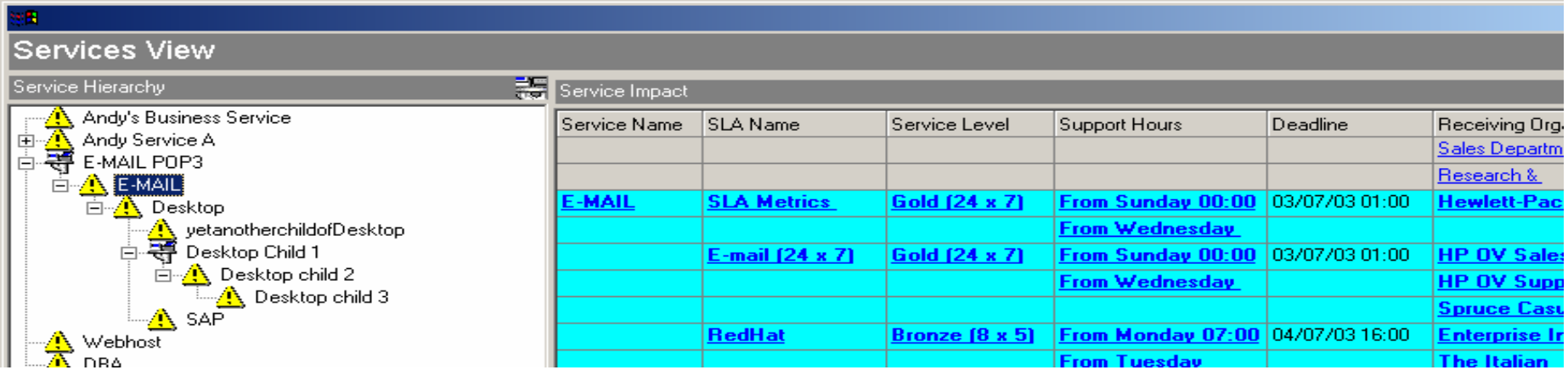
SLA “Services View” Overview



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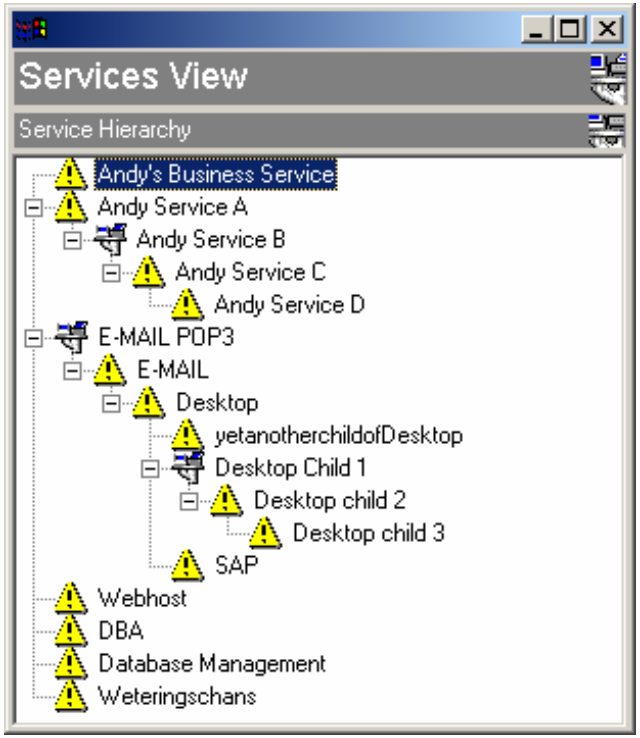
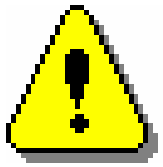
SLA Service Hierarchy





Impacted services

Non-Impacted services

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SLA Service Impact Table

Service Impact

Service Name	SLA Name	Service Level	Support Hours	Deadline	Receiving Organization
DBA	**DBA SLA TEST**	**Gold (24 x 7)**	**From Sunday 00:00**	02/07/03 18:00	**E-Go Trading Inc.**
			From Wednesday		**Sales Department**
					Broadband Service
Database Management	Spruce	Gold (24 x 7)	From Sunday 00:00 to	03/07/03 01:00	Control BU
			From Wednesday 01:00		Spruce Casualty and Life
					Sales Department
					Research & Development
E-MAIL	SLA Metrics Demo	Gold (24 x 7)	From Sunday 00:00 to	03/07/03 01:00	Hewlett-Packard
			From Wednesday 01:00		
	E-mail (24 x 7)	Gold (24 x 7)	From Sunday 00:00 to	03/07/03 01:00	HP OV Sales
			From Wednesday 01:00		HP OV Support
					Spruce Casualty and Life
	RedHat	Bronze (8 x 5)	From Monday 07:00 to	04/07/03 16:00	Enterprise Internet
			From Tuesday 07:00 to		The Italian Sandwich
			From Wednesday 07:00		
			From Thursday 07:00 to		
			From Friday 07:00 to		

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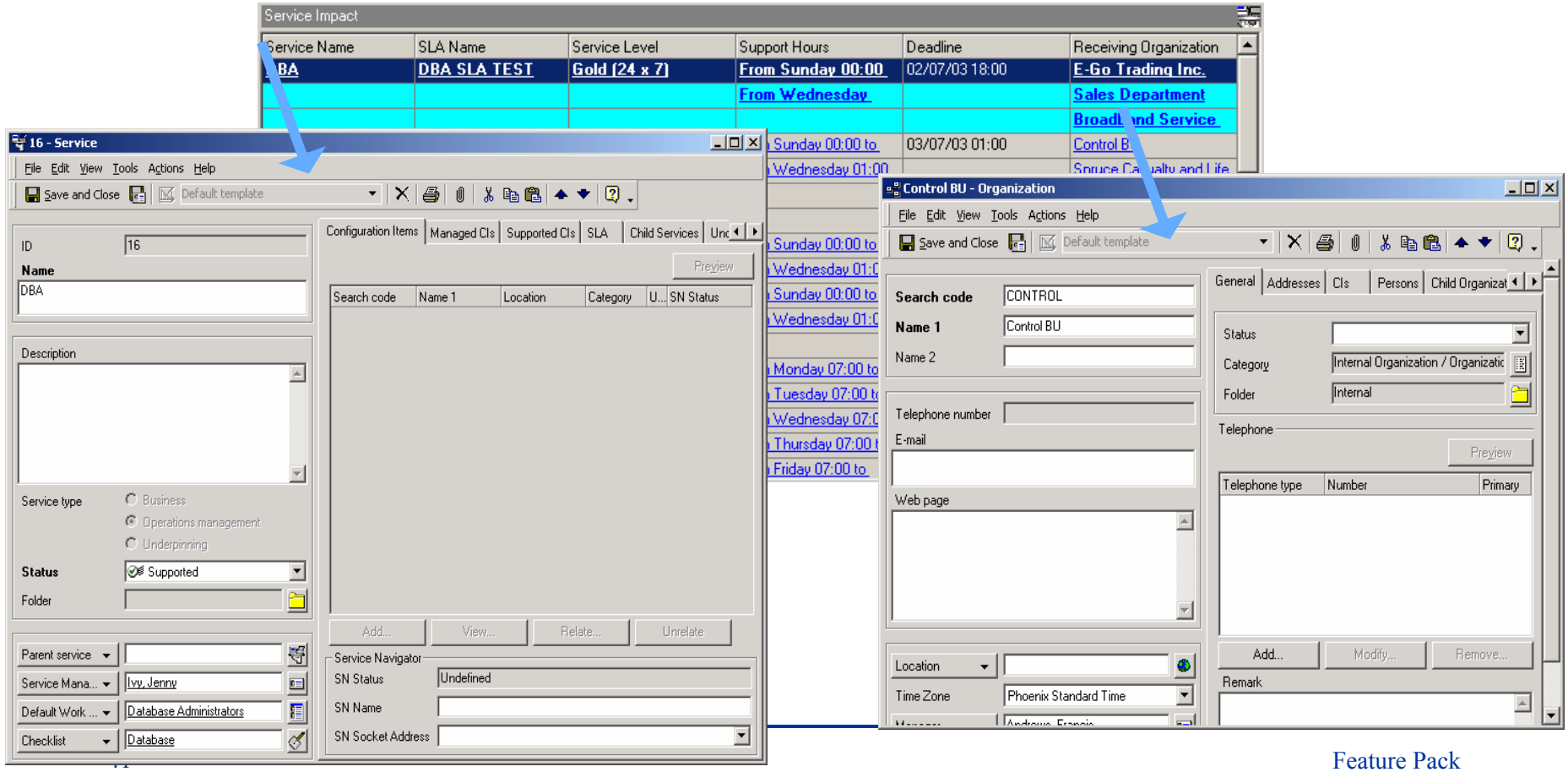
SLA Service Impact Table Links



Feature Pack

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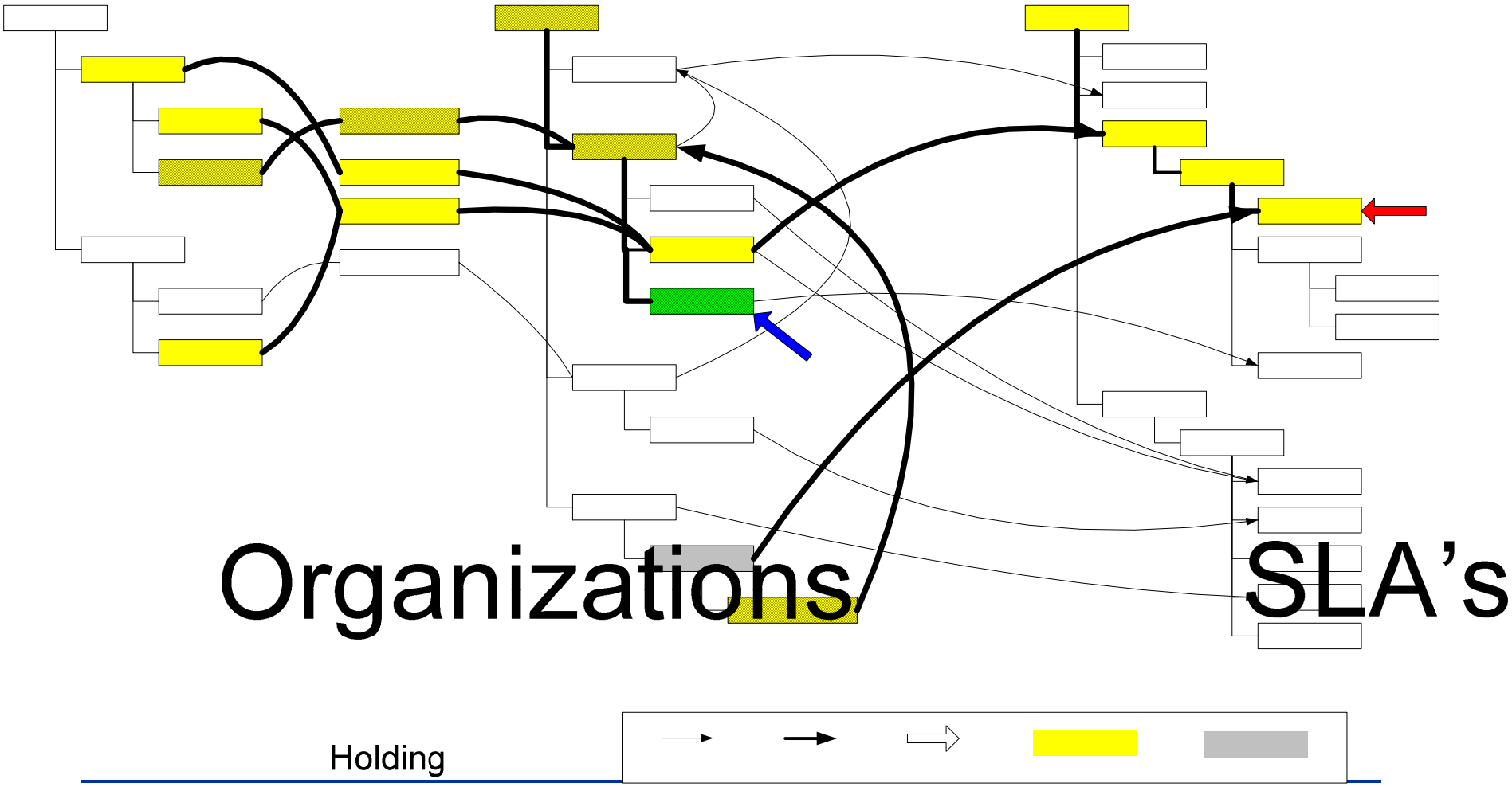
SLA Service Impact



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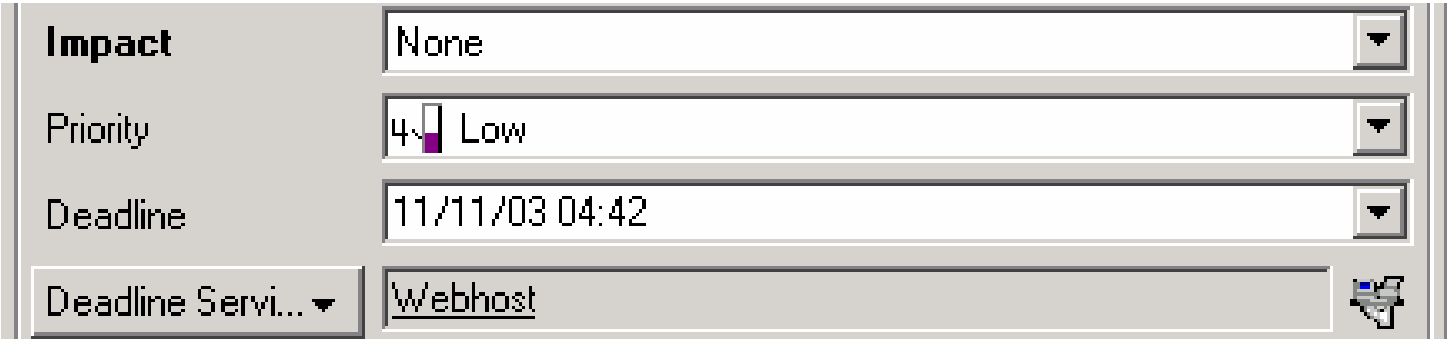
Deadline Service Attribute

- SLA impact assessment features
  - The new Deadline Service attribute for Incidents and Service Calls that shows the name of the Service from which the Deadline was calculated
  - Taken from the SLA that had the most stringent service level for the CI or Service (or both) involved



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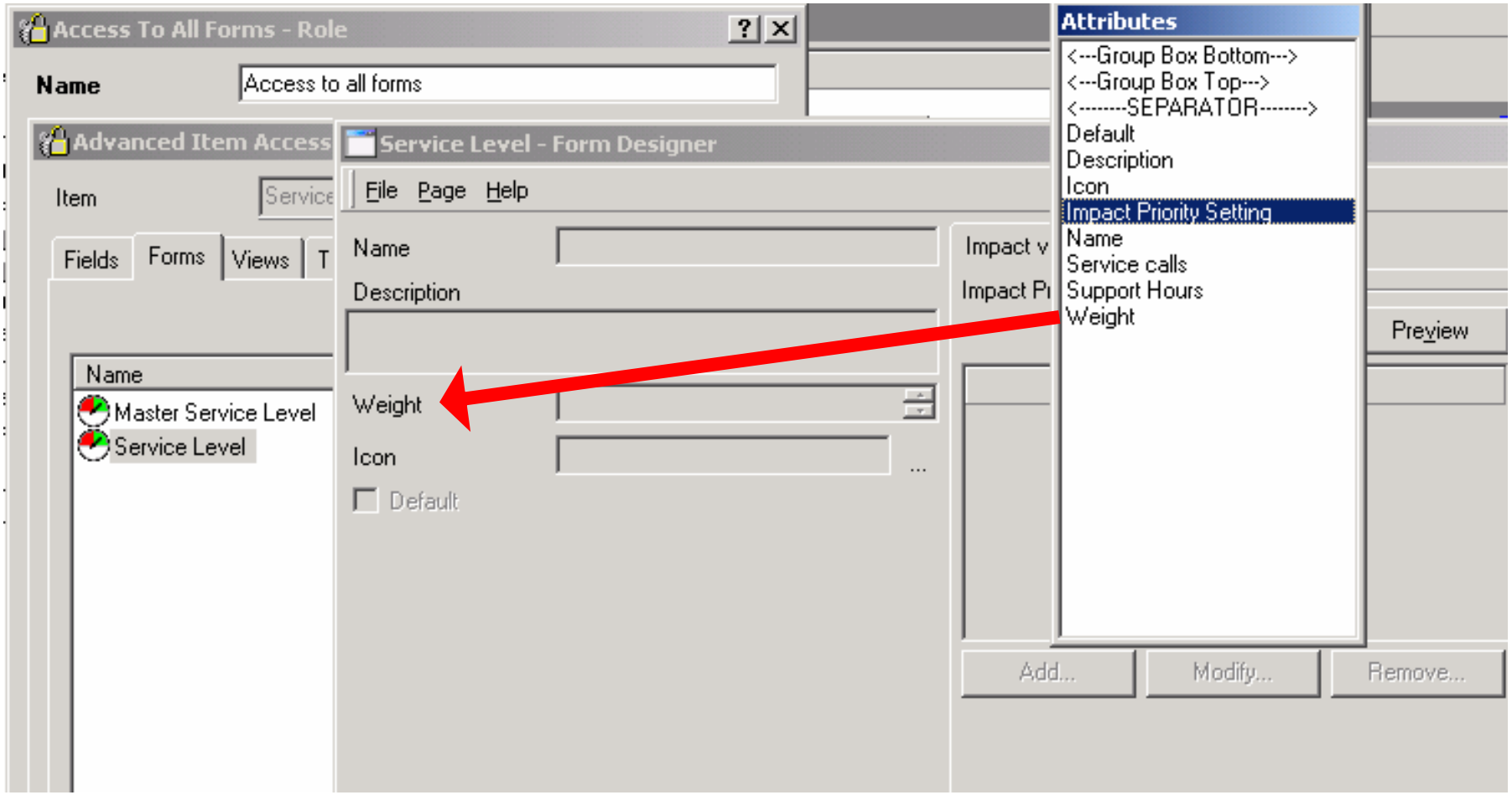
Service Level Weight

- Each Service Level has a Service Level weight



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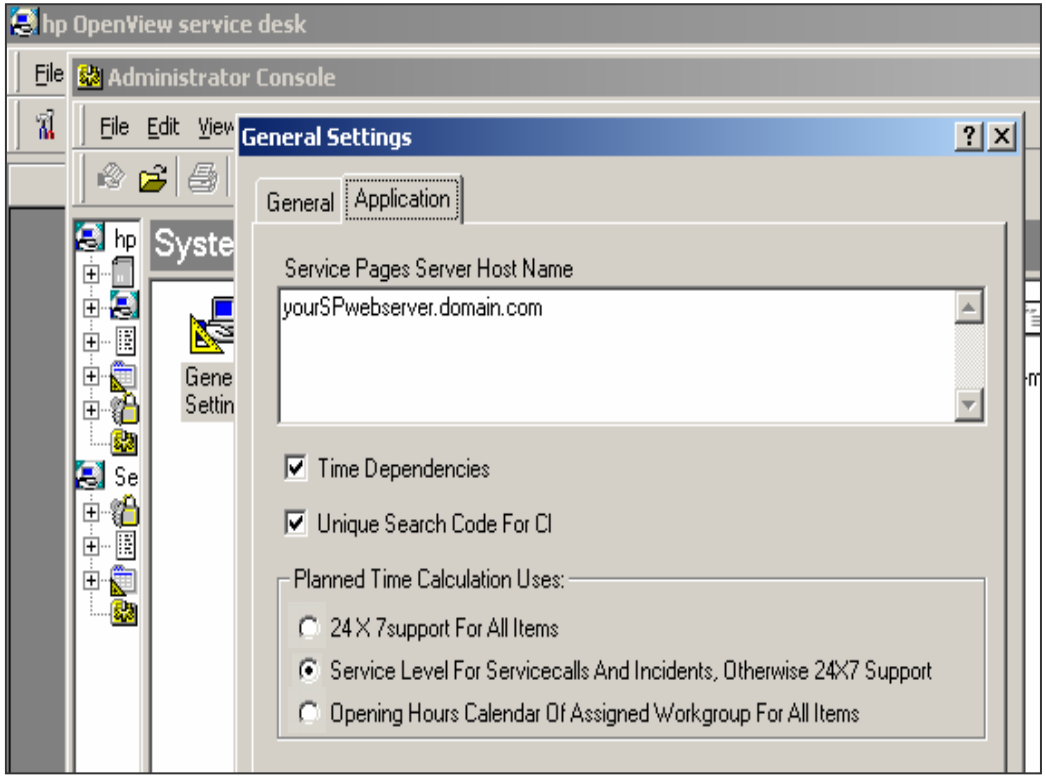
Planned Time Calculation Uses

Workflow calculation per Work order (1 of 3)



- **Workflow calc:**
  - **Change, Work orders**
- **For**
  - **Planned start**
  - **Planned finish**
  - **Planning duration values**

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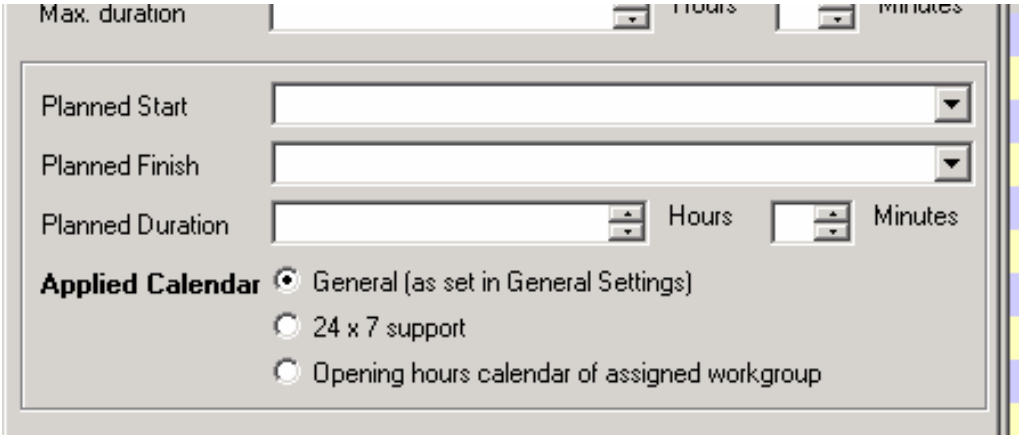
Applied Calendar

Workflow calculation per Work order (2 of 3)

- **Get a more fine grained workflow**
  - **General setting on Work order level**
  - **Default, 'General (as set in General Settings)'**



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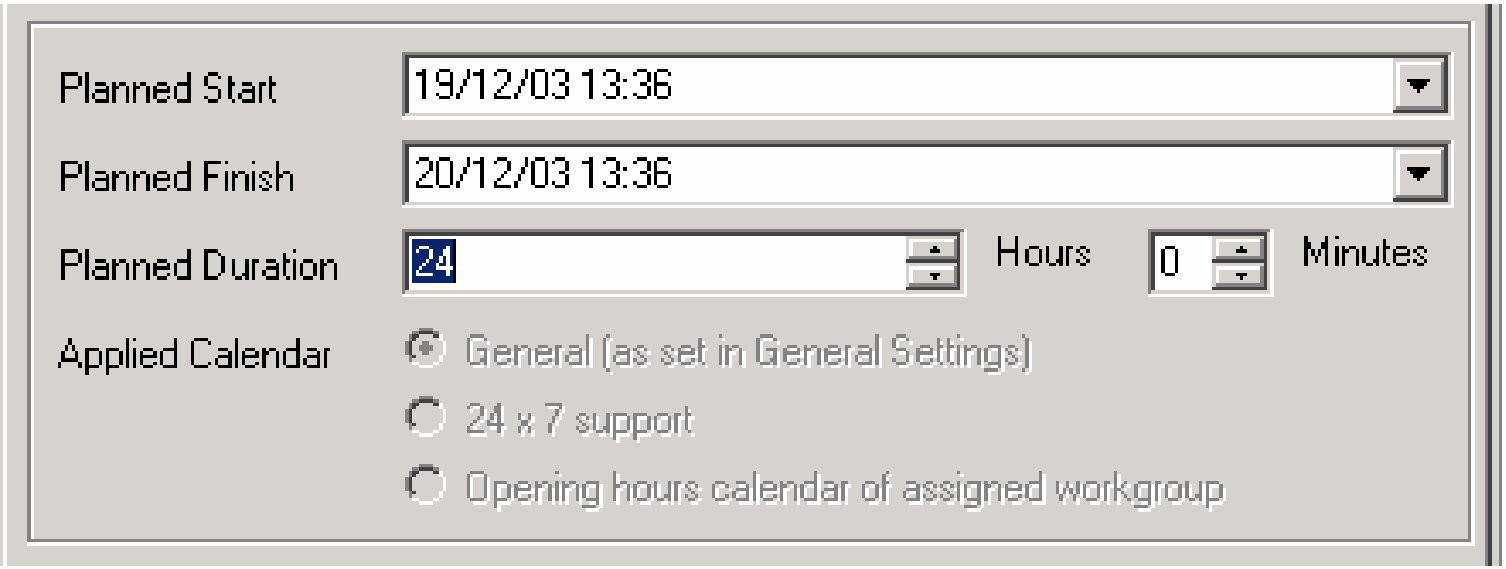
Applied Calendar Disabled

Workflow calculation per Work order (3 of 3)

- **The new field is disabled when all the Workflow-related fields have been set:**



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OVO fields for outage

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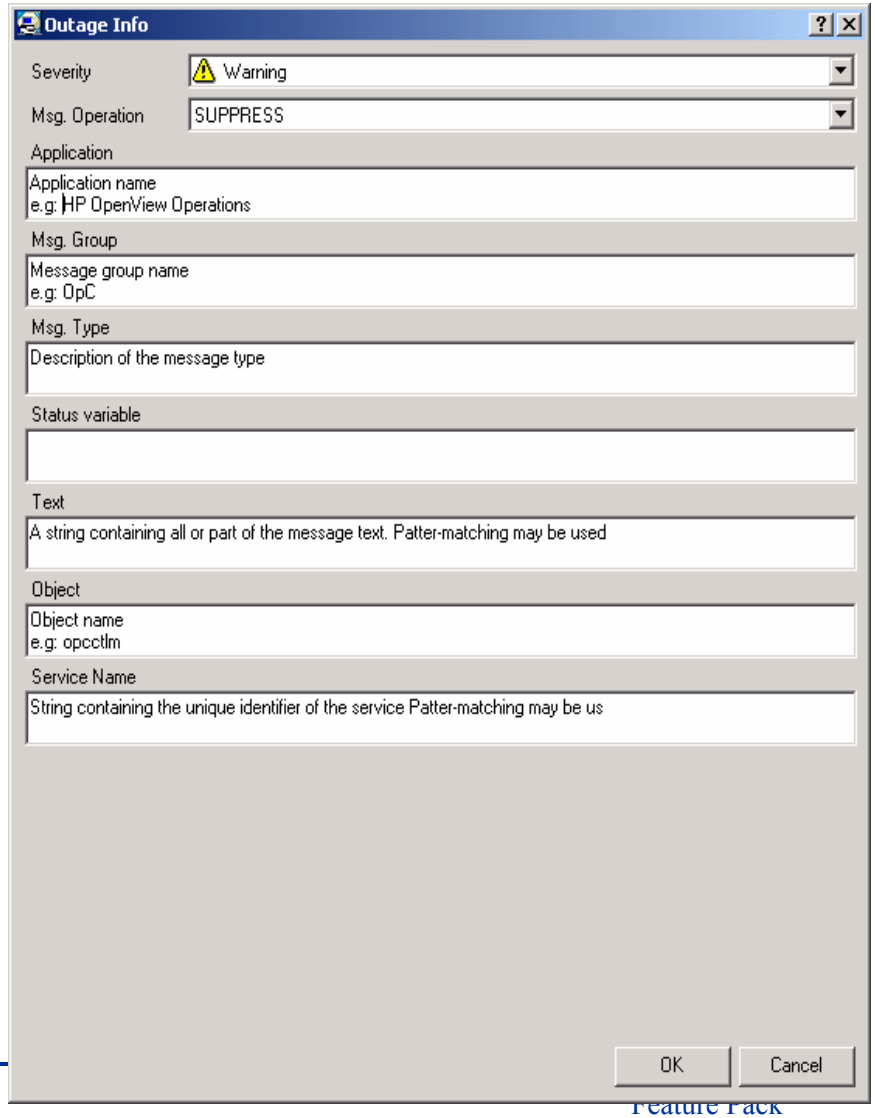
OVO fields on Outage Info

The following messages properties have been added:

- **Msg Type**
- **Text**
- **Object**
- **Service Name**



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Outage Database Rules

Outage Database Rules:

- ACES file called “sp7-aces-dbrules-mkoutage.xml”
- Location: ……\server\data_exchange\xml

- New installation: Use the new database rules
- Existing installation: Modify the current database rules

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OVO Services

OVO services:

- ACES file called “sp7-aces-ovoservices.xml”
- Location: ……\server\data_exchange\xml
- The File contains:
  - **OVO Unix services mapping**
  - **OVO services templates**
  - **Data exchange task**

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SP 7 Requirements, Upgrade Strategy

- **Requirements:**
  - Service Desk 4.5 installation

- **Upgrade strategy**
  - installs like regular service pack
  - supersedes previous service packs
  - some functionality is switched off by default upon installation
  - rules with a not operator are automatically changed to the Negate option

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