

# **Administration Guide**

## **Novell Service Desk 7.0.3**

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# 1 Administrator Guide

11

|        |  |    |
|--------|--|----|
| 1.1    | Welcome  | 11 |
| 1.2    | Online Help                                      | 11 |
| 1.3    | Configuration Steps                              | 12 |
| 1.3.1  | Implementing the Processes                       | 14 |
| 1.4    | Users  | 15 |
| 1.4.1  | User Availability                                | 15 |
| 1.4.2  | Creating a User Account                          | 15 |
| 1.4.3  | Information Tab                                  | 15 |
| 1.4.4  | Schedule Tab                                     | 20 |
| 1.4.5  | Aliases Tab                                      | 22 |
| 1.4.6  | Team Tab   | 23 |
| 1.4.7  | Skills Tab                                       | 25 |
| 1.4.8  | Org Units  | 26 |
| 1.5    | Technician Assignment                            | 28 |
| 1.5.1  | Service Manager and Workflow States              | 30 |
| 1.5.2  | Self Assign Option                               | 30 |
| 1.5.3  | Request Queues                                   | 30 |
| 1.6    | Organizational Units                             | 31 |
| 1.6.1  | Organizational Unit Filters                      | 31 |
| 1.6.2  | Organizational Units and External Authentication | 31 |
| 1.6.3  | Details Tab                                      | 32 |
| 1.6.4  | Customers Tab                                    | 34 |
| 1.6.5  | Technicians Tab                                  | 35 |
| 1.6.6  | Departments Tab                                  | 35 |
| 1.6.7  | Rooms Tab  | 37 |
| 1.6.8  | Items Tab  | 38 |
| 1.6.9  | Requests Tab                                     | 38 |
| 1.6.10 | Contracts Tab                                    | 39 |
| 1.7    | Primary Contact                                  | 43 |
| 1.8    | Customers  | 44 |
| 1.8.1  | Creating a Customer Account                      | 45 |
| 1.8.2  | Information Tab                                  | 45 |
| 1.8.3  | Aliases Tab                                      | 48 |
| 1.8.4  | Items Tab  | 49 |
| 1.8.5  | Requests Tab                                     | 50 |
| 1.8.6  | Contracts Tab                                    | 50 |
| 1.9    | Service Level Management                         | 54 |
| 1.9.1  | SLAs in Action                                   | 55 |
| 1.9.2  | Service Tab                                      | 56 |
| 1.10   | Service Level Management Configuration           | 56 |
| 1.10.1 | Introduction                                     | 56 |
| 1.10.2 | OLAs & UCs                                       | 56 |
| 1.10.3 | Workflows and Workflow States                    | 56 |
| 1.10.4 | Escalation                                       | 57 |
| 1.10.5 | SLAs and Workflow                                | 57 |
| 1.10.6 | Creating a Custom Workflow                       | 57 |
| 1.10.7 | Configuring SLM in the system                    | 57 |
| 1.10.8 | Applying SLM to request creation and management  | 59 |
| 1.11   | Breach Codes                                     | 60 |
| 1.12   | Contracts  | 61 |
| 1.12.1 | Contract Types                                   | 62 |
| 1.12.2 | Contracts Option                                 | 62 |
| 1.12.3 | Contract Creation                                | 63 |
| 1.12.4 | Contract Fields                                  | 63 |
| 1.12.5 | Attachment Tab                                   | 64 |
| 1.12.6 | Audit Tab  | 64 |
| 1.12.7 | Contract Validation Process                      | 64 |

|        |   |     |
|--------|---|-----|
| 1.13   | Contract Assignment                                   | 65  |
| 1.13.1 | Customer Contracts                                    | 65  |
| 1.13.2 | Organizational Units Contracts                        | 68  |
| 1.13.3 | Item Contracts  | 71  |
| 1.13.4 | Per Request Contracts                                 | 74  |
| 1.13.5 | Contracts with Invoices Enabled                       | 74  |
| 1.13.6 | Canceling Contracts                                   | 74  |
| 1.14   | Create & Process a Request with Contracts enabled     | 75  |
| 1.14.1 | Request with Per Item Contract                        | 76  |
| 1.14.2 | Request with Per Request Contract                     | 77  |
| 1.14.3 | Grouped Requests and Contracts                        | 78  |
| 1.14.4 | Processing an Invoice                                 | 79  |
| 1.14.5 | Invoice Cancellation                                  | 79  |
| 1.15   | Operational Level Agreements (OLAs)                   | 80  |
| 1.15.1 | Details Tab   | 80  |
| 1.15.2 | States Tab  | 84  |
| 1.15.3 | Teams Tab   | 85  |
| 1.16   | Underpinning Contracts                                | 85  |
| 1.16.1 | Details Tab   | 86  |
| 1.16.2 | States Tab  | 90  |
| 1.17   | Incident & Problem Workflows                          | 90  |
| 1.17.1 | SLAs and Workflows                                    | 90  |
| 1.17.2 | Editing default Incident and Problem Workflows        | 90  |
| 1.17.3 | Editing Template Workflows                            | 92  |
| 1.17.4 | Adding or editing Workflow States:                    | 95  |
| 1.17.5 | Workflow Map  | 99  |
| 1.17.6 | Deleting a Workflow State                             | 99  |
| 1.18   | Billing: Contracts and Invoices                       | 99  |
| 1.18.1 | Contract Validation Process                           | 100 |
| 1.19   | Service Request & Change Management Workflows         | 101 |
| 1.19.1 | SLAs and Workflows                                    | 101 |
| 1.19.2 | Approval States                                       | 101 |
| 1.19.3 | Editing a Default Workflow                            | 102 |
| 1.19.4 | Adding or editing Workflow States:                    | 105 |
| 1.19.5 | Workflow Map  | 110 |
| 1.19.6 | Deleting an Unassigned Workflow                       | 110 |
| 1.19.7 | Deleting a Workflow State                             | 111 |
| 1.20   | Creating a Service or Change Request Team             | 111 |
| 1.20.1 | Creating a Service Request or Change Team             | 111 |
| 1.20.2 | Manager Approval State assignment                     | 118 |
| 1.20.3 | Layers Tab  | 120 |
| 1.21   | KBA Content Approval                                  | 121 |
| 1.21.1 | Creating KBA Approval Requests                        | 121 |
| 1.21.2 | Managing KBA Approval Requests                        | 122 |
| 1.22   | Teams   | 125 |
| 1.22.1 | Unknown Team  | 126 |
| 1.22.2 | Creating an Incident or Problem Team                  | 126 |
| 1.22.3 | Creating and Configuring Additional Escalation Layers | 131 |
| 1.22.4 | Editing an Escalation Layer                           | 132 |
| 1.22.5 | Configuration of Escalation Layers                    | 132 |
| 1.23   | Service Portfolio Team                                | 133 |
| 1.23.1 | Working with Service Portfolio Teams                  | 133 |
| 1.23.2 | Creating a Service Portfolio Team                     | 134 |
| 1.23.3 | Removing Team Members from a Group                    | 135 |
| 1.23.4 | Removing a User from a Team                           | 136 |
| 1.24   | Release & Deployment Team                             | 136 |
| 1.24.1 | Working with Release Management Teams                 | 136 |
| 1.24.2 | Creating a Release & Deployment Team                  | 137 |
| 1.24.3 | Removing Team Members from a Group                    | 140 |

|        |   |     |
|--------|---|-----|
| 1.24.4 | Removing a User from a Team   | 140 |
| 1.25   | Queues for requests   | 141 |
| 1.25.1 | Enabling the Queue  | 141 |
| 1.25.2 | Assigning requests from a Queue   | 145 |
| 1.25.3 | Reassign a request to the Queue   | 145 |
| 1.25.4 | Queue Filter  | 146 |
| 1.26   | Configuration Categories  | 147 |
| 1.26.1 | Categories Tab  | 147 |
| 1.27   | Service Item Costs Tab  | 155 |
| 1.27.1 | Billing Enabled   | 158 |
| 1.27.2 | Create a Contract   | 159 |
| 1.28   | Creating Custom Field Lists   | 161 |
| 1.28.1 | Creating a New List Entry   | 161 |
| 1.28.2 | Creating Nested List Entries  | 163 |
| 1.28.3 | Renaming a List Entry   | 164 |
| 1.28.4 | Deleting a List Entry   | 164 |
| 1.29   | Responses Templates   | 165 |
| 1.29.1 | Editing a Template  | 165 |
| 1.29.2 | Adding a Template   | 166 |
| 1.29.3 | Deleting a Template   | 167 |
| 1.30   | Federation Tab  | 168 |
| 1.30.1 | Creating a Category Map   | 168 |
| 1.31   | AMIE Snapshots  | 169 |
| 1.31.1 | Item creation in the CMDB   | 169 |
| 1.31.2 | Merging Snapshots   | 170 |
| 1.31.3 | Creating Items from Snapshots   | 170 |
| 1.31.4 | Searching AMIE Snapshots  | 170 |
| 1.31.5 | Deleting Snapshots  | 171 |
| 1.31.6 | Enabling deleted Snapshots  | 171 |
| 1.32   | Category Lifecycle  | 172 |
| 1.32.1 | Creating a Lifecycle  | 173 |
| 1.32.2 | Deleting a State  | 176 |
| 1.32.3 | Assigning the Lifecycle Status of Arrived to an Item with the Category Hardware | 177 |
| 1.33   | Category Classifications  | 177 |
| 1.33.1 | Classification Tab  | 178 |
| 1.34   | Service Catalog   | 181 |
| 1.34.1 | Create a Service  | 182 |
| 1.34.2 | Managing Service Costs  | 184 |
| 1.34.3 | View Service Relationships  | 184 |
| 1.34.4 | Delete a Relationship   | 186 |
| 1.34.5 | Managing the Service Catalog  | 186 |
| 1.35   | Details Tab   | 186 |
| 1.35.1 | Item Description  | 187 |
| 1.35.2 | Item Notes  | 188 |
| 1.35.3 | Item Attachments  | 189 |
| 1.35.4 | Item Audit Trail  | 189 |
| 1.35.5 | Rollback Option   | 189 |
| 1.36   | Relationships Tab   | 190 |
| 1.36.1 | Create a Relationship   | 190 |
| 1.36.2 | Relationship Map  | 191 |
| 1.36.3 | To delete a Relationship  | 193 |
| 1.36.4 | AMIE Item Imports and Relationships   | 193 |
| 1.37   | Item Types  | 193 |
| 1.37.1 | Create a New Item Type  | 194 |
| 1.37.2 | SLAs and Item Types   | 197 |
| 1.37.3 | Classification  | 197 |
| 1.37.4 | Items   | 200 |
| 1.37.5 | Requests  | 200 |

|        |  |     |
|--------|--|-----|
| 1.37.6 | Costs  | 200 |
| 1.37.7 | Fields   | 202 |
| 1.37.8 | Responses  | 204 |
| 1.38   | Create a Manufacturer  | 206 |
| 1.38.1 | Creating a New Manufacturer                                  | 206 |
| 1.38.2 | Editing a Manufacturer                                       | 207 |
| 1.39   | Items  | 207 |
| 1.39.1 | View an Item   | 209 |
| 1.40   | Creating an Item   | 209 |
| 1.40.1 | Creating an Item during request creation                     | 209 |
| 1.40.2 | Item Information   | 211 |
| 1.40.3 | Details  | 214 |
| 1.40.4 | Costs  | 219 |
| 1.40.5 | Requests   | 224 |
| 1.40.6 | Item Relationships   | 225 |
| 1.41   | Create an Item   | 228 |
| 1.41.1 | Item Criticality   | 231 |
| 1.42   | Costs Tab  | 231 |
| 1.42.1 | Billing Enabled  | 233 |
| 1.42.2 | Create a Contract  | 234 |
| 1.43   | Requests Tab   | 237 |
| 1.44   | Outages Tab  | 237 |
| 1.44.1 | Creating an Outage   | 237 |
| 1.45   | Searching for an Item  | 239 |
| 1.45.1 | Tips on searching for an Item:                               | 241 |
| 1.46   | Full Text Search Options                                     | 241 |
| 1.46.1 | Field Searches   | 242 |
| 1.47   | Bulk Item Update   | 243 |
| 1.48   | Request Fulfilment Overview                                  | 245 |
| 1.48.1 | Implementing Request Fulfillment                             | 246 |
| 1.49   | Assigning an SLA   | 248 |
| 1.49.1 | Assigning an SLA to a Customer                               | 248 |
| 1.49.2 | Assigning an SLA to an Organizational Unit                   | 249 |
| 1.49.3 | Assigning an SLA to an Item                                  | 249 |
| 1.49.4 | Assigning an SLA to a Request - Only when Billing is enabled | 250 |
| 1.50   | Incident Management  | 250 |
| 1.50.1 | Implementing Incident Management                             | 251 |
| 1.51   | Problem Management   | 253 |
| 1.51.1 | Implementing Problem Management                              | 254 |
| 1.52   | Change Management  | 256 |
| 1.52.1 | Implementing Change Management                               | 257 |
| 1.53   | Release and Deployment Management                            | 259 |
| 1.54   | Release Management Applied                                   | 260 |
| 1.54.1 | Example 1: Install, upgrade and replace Office packages      | 260 |
| 1.54.2 | Assign Item Types  | 263 |
| 1.54.3 | Create Deployment Activities                                 | 269 |
| 1.54.4 | Action Deployment Tasks                                      | 272 |
| 1.54.5 | Example 2: Update Microsoft Exchange                         | 274 |
| 1.54.6 | Associating RFCs with the Release                            | 276 |
| 1.54.7 | RFC Creation and Management                                  | 278 |
| 1.55   | Release Workflow   | 282 |
| 1.55.1 | Approval States  | 282 |
| 1.55.2 | Editing the Default Workflow                                 | 283 |
| 1.55.3 | Adding or editing Workflow States:                           | 284 |
| 1.55.4 | Workflow Map   | 288 |
| 1.55.5 | Deleting the default Release Workflow                        | 288 |
| 1.55.6 | Deleting a Workflow State                                    | 289 |
| 1.56   | Basic Procedures   | 289 |

|        |  |     |
|--------|--|-----|
| 1.56.1 | Mandatory Fields   | 289 |
| 1.56.2 | Creating an Element  | 289 |
| 1.56.3 | Editing an Element   | 290 |
| 1.56.4 | Deleting an Entry  | 290 |
| 1.56.5 | Exporting to PDF and Excel                                       | 291 |
| 1.56.6 | Formatting Print Views   | 291 |
| 1.57   | List Views   | 292 |
| 1.57.1 | Create a List View   | 292 |
| 1.57.2 | Selecting a List View as the Default View                        | 294 |
| 1.57.3 | Displaying a Different List View                                 | 294 |
| 1.57.4 | Editing a List View Column                                       | 294 |
| 1.57.5 | Duplicating a List View  | 294 |
| 1.58   | List View Options for all Request Types                          | 295 |
| 1.59   | List View Options: Configuration Tab                             | 297 |
| 1.60   | List View Options: Users Tab                                     | 299 |
| 1.60.1 | Customers List View options                                      | 299 |
| 1.60.2 | Organizational Units and Partner Organizations List View options | 301 |
| 1.60.3 | Users List View options  | 301 |
| 1.61   | List View Options: Knowledge Tab                                 | 303 |
| 1.62   | Administrator View   | 304 |
| 1.63   | User   | 304 |

## **2 Users 307**

|        |  |     |
|--------|--|-----|
| 2.1    | User Tab   | 307 |
| 2.1.1  | User Availability  | 307 |
| 2.2    | Customers  | 308 |
| 2.2.1  | Customers  | 308 |
| 2.2.2  | Creating a Customer (Internal Authentication)                                | 309 |
| 2.2.3  | Advanced Search Option   | 317 |
| 2.2.4  | Pending Contracts  | 319 |
| 2.2.5  | Importing Customers using a CSV File   | 320 |
| 2.2.6  | Importing Customers using LDAP/Active Directory Server                       | 323 |
| 2.3    | Users  | 323 |
| 2.3.1  | Users  | 323 |
| 2.3.2  | Creating a User Account (Internal Authentication)                            | 324 |
| 2.3.3  | Importing Users using LDAP/Active Directory Server (External Authentication) | 336 |
| 2.4    | Assignments  | 337 |
| 2.4.1  | Creating an Assignment Template  | 337 |
| 2.4.2  | Editing an Assignment Template   | 339 |
| 2.4.3  | Deleting an Assignment Template  | 340 |
| 2.4.4  | Applying Assignment Templates to New Users                                   | 341 |
| 2.4.5  | Applying Assignment Templates to Existing Users                              | 342 |
| 2.5    | About Roles  | 343 |
| 2.5.1  | User Roles   | 343 |
| 2.5.2  | User Processes   | 344 |
| 2.5.3  | User Roles & Privileges  | 345 |
| 2.5.4  | Administrator Role   | 352 |
| 2.5.5  | Supervisor Role  | 352 |
| 2.5.6  | Technician Role  | 353 |
| 2.5.7  | Partner Role   | 353 |
| 2.5.8  | Manager Role   | 354 |
| 2.5.9  | Finance Role   | 354 |
| 2.5.10 | Customer Role  | 355 |

## **3 Reports 357**

|     |         |     |
|-----|---------|-----|
| 3.1 | Reports | 357 |
|-----|---------|-----|

|          |  |            |
|----------|--|------------|
| 3.2      | Login Report   | 357        |
| 3.3      | System Reports   | 358        |
| 3.4      | Log File View  | 358        |
| 3.4.1    | Log File Request   | 358        |
| <b>4</b> | <b>My Account</b>  | <b>359</b> |
| 4.1      | My Account   | 359        |
| 4.1.1    | Editing Account Information                              | 359        |
| 4.1.2    | Receiving Email  | 362        |
| 4.2      | Changing Roles   | 362        |
| 4.3      | Alerts   | 363        |
| 4.3.1    | Creating Alerts  | 364        |
| 4.3.2    | Deleting Alerts  | 366        |
| 4.3.3    | SLA Breach Alerts  | 366        |
| <b>5</b> | <b>Setup</b>   | <b>367</b> |
| 5.1      | Setup Tab  | 367        |
| 5.2      | Email  | 368        |
| 5.2.1    | Email  | 368        |
| 5.2.2    | Setup  | 371        |
| 5.2.3    | Templates  | 374        |
| 5.2.4    | SMS  | 407        |
| 5.2.5    | Email Log  | 409        |
| 5.3      | Custom Fields  | 410        |
| 5.3.1    | Enabling a Custom Field                                  | 410        |
| 5.3.2    | Data Type - List   | 413        |
| 5.3.3    | Custom Fields for Incidents, Change and Service Requests | 415        |
| 5.3.4    | LDAP/ADS Accounts Custom Fields                          | 416        |
| 5.4      | Privileges   | 417        |
| 5.4.1    | Privileges   | 417        |
| 5.4.2    | User Privileges  | 417        |
| 5.4.3    | Customer Privileges                                      | 420        |
| 5.4.4    | Requests Privileges                                      | 424        |
| 5.4.5    | System Privileges  | 428        |
| 5.5      | Customize  | 433        |
| 5.5.1    | Customize  | 433        |
| 5.5.2    | Portals  | 436        |
| 5.5.3    | Cascading Style Sheets (CSS)                             | 438        |
| 5.6      | Localization   | 439        |
| 5.6.1    | Regions  | 439        |
| 5.6.2    | Hours  | 441        |
| 5.6.3    | Content  | 442        |
| 5.6.4    | Item Type Request Fields                                 | 447        |
| 5.6.5    | Priority   | 453        |
| 5.6.6    | Email Signatures   | 454        |
| 5.6.7    | Titles   | 456        |
| 5.7      | Licenses   | 457        |
| 5.7.1    | Viewing a License  | 458        |
| 5.7.2    | Host Tab   | 459        |
| 5.7.3    | Install Tab  | 459        |
| 5.7.4    | Users Tab  | 460        |
| 5.8      | Database   | 460        |
| 5.8.1    | Configuring Database Settings                            | 460        |
| 5.8.2    | Test Button  | 461        |
| 5.8.3    | Advanced Button  | 462        |
| 5.9      | LDAP   | 463        |



|         |  |     |
|---------|--|-----|
| 5.9.1   | LDAP Authentication . . . . .                          | 463 |
| 5.9.2   | Active Directory Integration . . . . .                 | 465 |
| 5.9.3   | LDAP Server Integration . . . . .                      | 468 |
| 5.9.4   | LDAP/Active Directory Advanced Settings . . . . .      | 471 |
| 5.10    | SSO . . . . .  | 475 |
| 5.10.1  | Single Sign On . . . . .                               | 475 |
| 5.10.2  | Social . . . . .                                       | 476 |
| 5.11    | Reports . . . . .                                      | 479 |
| 5.11.1  | Schedule Reports . . . . .                             | 479 |
| 5.11.2  | Customize Reports . . . . .                            | 481 |
| 5.11.3  | Creating Custom Reports . . . . .                      | 482 |
| 5.12    | Billing . . . . .                                      | 491 |
| 5.12.1  | Billing . . . . .                                      | 491 |
| 5.12.2  | Invoices . . . . .                                     | 492 |
| 5.12.3  | Creating Invoices . . . . .                            | 493 |
| 5.12.4  | Invoice Summary . . . . .                              | 501 |
| 5.12.5  | Invoice Payment & Delivery . . . . .                   | 503 |
| 5.12.6  | Service Level Agreements (SLAs) . . . . .              | 504 |
| 5.12.7  | Outages . . . . .                                      | 514 |
| 5.12.8  | Purchase Orders . . . . .                              | 519 |
| 5.12.9  | Contracts . . . . .                                    | 520 |
| 5.12.10 | Invoices . . . . .                                     | 523 |
| 5.13    | AMIE . . . . .   | 525 |
| 5.13.1  | AMIE Mappings for Servers . . . . .                    | 525 |
| 5.13.2  | AMIE Customized Mapping . . . . .                      | 541 |
| 5.13.3  | Managing Items using Database Mapping (AMIE) . . . . . | 546 |
| 5.13.4  | Importing Items using a .CSV File . . . . .            | 553 |
| 5.13.5  | Downloading an Item .CSV Template . . . . .            | 560 |
| 5.13.6  | Financial Management . . . . .                         | 568 |
| 5.13.7  | Service Portfolio Management . . . . .                 | 568 |
| 5.13.8  | Financial Management Applied . . . . .                 | 573 |
| 5.13.9  | ZENWorks . . . . .                                     | 583 |

**6 CMS 587**

|       |   |     |
|-------|---|-----|
| 6.1   | Configuration Management System (CMS) . . . . . | 587 |
| 6.2   | Relationships . . . . .                         | 587 |
| 6.2.1 | Edit or Create Relationship Types . . . . .     | 587 |
| 6.2.2 | Delete a Relationship Type . . . . .            | 589 |
| 6.3   | Durations . . . . .                             | 590 |
| 6.3.1 | Creating or editing durations . . . . .         | 591 |
| 6.3.2 | Delete a Duration . . . . .                     | 591 |
| 6.4   | Incident Analyzer . . . . .                     | 592 |
| 6.4.1 | Configuring the Incident Analyzer . . . . .     | 592 |

**A Appendix 595**

|       |  |     |
|-------|--|-----|
| A.1   | Embedded Support Form . . . . .                      | 595 |
| A.2   | Email Polling & Request Creation via Email . . . . . | 596 |
| A.2.1 | Email Polling . . . . .                              | 596 |
| A.2.2 | Creating requests via Email . . . . .                | 599 |
| A.2.3 | Monitoring Tools and Request Creation . . . . .      | 600 |
| A.2.4 | Adding Notes via Email . . . . .                     | 600 |
| A.2.5 | Setting Up Team Aliases . . . . .                    | 600 |
| A.2.6 | Troubleshooting . . . . .                            | 601 |
| A.3   | Web Services . . . . .                               | 601 |
| A.4   | Internationalization . . . . .                       | 601 |
| A.4.1 | Internationalization . . . . .                       | 602 |

|       |                         |     |
|-------|-------------------------|-----|
| A.4.2 | Simple Messages .....   | 602 |
| A.4.3 | Compound Messages ..... | 603 |
| A.5   | AMIE Import .....       | 604 |

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# 1 Administrator Guide

## 1.1 Welcome

Thank you for choosing our service management solution. Your decision guarantees your service organization's ability to deliver a comprehensive customer support service that meets, and even exceeds, your customer expectations.

Easy to configure and customize, our service management solution has been developed to offer the very best experience to users via the Web. This all-in-one support solution enables service issues to be readily created, managed, monitored and solved, with minimal impact to your customer's organization, allowing them to focus on their core business.

Your customers have access to a user-friendly portal that offers an easy-to-use Knowledge Base and request tracking system. Your technicians are provided with the tools that allow them to offer effective and efficient service. Supervisors have access to comprehensive management and reporting of the service desk, its technicians and all support issues.

For assistance with set-up and configuration of the application, access the [Configuration Steps](#) section of this guide. The configuration process requires the User to switch between the Administrator Role and Supervisor Role, so in the first instance it is advisable that the person customizing the application have both User Roles and this can be set for their account within the User tab of the Administrator screen.

The User Guides have sections relevant to the various User Roles within the application, including:

- ♦ [Administrator](#)
- ♦ [Supervisor](#)
- ♦ [Technician](#)
- ♦ [Partner](#)
- ♦ [Finance User](#)
- ♦ [Manager](#)
- ♦ [Customer](#).

To start using this User Guide, click on the User Guide link within the Contents tab. Or, to use the step-by-step guide to assist with the application set-up, see [Configuration Steps](#).

Use single clicks within the guide to open topic information.

## 1.2 Online Help

To assist Users when using the system, online help is available throughout the application.

To access information relevant to an opened screen, click the Help button located in the top right corner of the screen, next to the Logout button.

A Help Page is displayed containing information related to the application page that is open. Navigate through the help information as necessary, or click Show to view the entire User Guide.

## 1.3 Configuration Steps

These configuration steps are recommended as a guide to assist with customizing the application to suit the service environment. These steps are what is required at a minimum to enable your system. It should be noted that these steps require access to the Administrator and Supervisor views.

The following procedure covers editing the logged in User account details and ensuring this User has all the relevant privileges to achieve what is required to configure the system. It then details the steps to enable the system to work with Email, setting the privileges for how Customers and Technicians can interact with the system, and how requests and the system will behave. This is defined within the Setup>Privileges tabs.

The User then has the option to customize the look and feel of the system, although this can be done later, if preferred. The next step is to create Customers and Users in the system.

Moving to the Supervisor Role, the User then configures the day-to-day elements within the application, which are part of creating and managing requests. This includes setting the timeframes for managing requests and defining trigger points for escalations by configuring SLAs; detailing the steps a request will move through, by customizing Workflows, which includes setting the stages of the Workflow where timers will trigger automatic warnings and escalations; defining the Team(s) of Technicians who will be associated with the customized Workflows and SLAs.

With the basic elements in the system now in place, the User then moves to the Configuration tab to customize the Configuration Management Database (CMDB). This part is often considered the most complex part of configuring the system, as this is where the service environment, including physical and service Items, is mapped into the system with associated relationships. When designing the CMDB, first the templates for all the different Item Categories are created. These are refined as Item Type templates, with these two templates used to define the information recorded against each Item and classification of issues that can be associated with each Item when requests are logged by Customers.

After the CMDB structure is defined, Items are imported via AMIE or .csv file. This is when the Items are associated with Customers or Organizational Units, who can log requests against the assigned Items.

In the *Administrator* (Setup) view:

1. Customize the default Supervisor access

Include Incident, Service Level Management and if applicable, Request Fulfillment, Problem and Change Management. Adjust the User Timezone, if applicable. (See: [User](#))

2. Configure Email Setup and Email Messages (See: [Setup>Email](#))

This step allows the system to manage requests via email. After completing the information in the Server and Setup tabs, the content for automated emails sent by this system can be customized. This does not have to be all done at this point, however, it is suggested that within the last page of the Templates tab, the Signature be updated to reflect the service organization name.

3. Enable System Privileges (See: [Setup>Privileges](#))

At this stage, it is suggested that each option be reviewed in the [User](#), [Customer](#), [Request](#) and [System](#) tabs within the Privileges sub-menu option. Although it should be noted, these can be adjusted in the future. If you are unsure about what an option refers to, select the Help button on the system UI, to display the relevant page of the User Guide. Be sure to set the appropriate Time Zone within the Customers Privilege tab, as this needs to be set before importing Customers and Users via an authentication server to ensure it is set correctly on all newly created accounts.

4. Customize Banners and Welcome Page Message (See: [Setup>Customize](#))

This can be done now if the images are available. Alternatively, return to this step at a later stage.

5. Create Customers and Users, which include Supervisor, Technician and Partner accounts

Note, to associate Organizational Unit information with Customers or Users, this can be configured at this point within the Supervisor>User>[Organizational Unit](#) tab. Should the import include the name of the Org Unit that matches what is recorded in the system, the details from the information recorded internally will be applied to the Customer or User.

If using an authentication server, move to the Setup>Authentication tab. (See: [Setup>Authentication](#); [Active Directory Integration](#) or [LDAP Integration](#))

If creating accounts directly in the system (i.e., using internal authentication), go to the User tab. (See: [Customers](#) and [Users](#).)

6. Set up Service Level Agreements (See: [Service Level Management](#))

Move to the *Supervisor view* by clicking the User link, next to the logged in User Name.

If these are unknown at this time, the system includes a default SLA that can be used.

7. If applicable, create Operational Level Agreements and/or Underpinning Contracts (See: [OLAs](#) or [UCs](#))

This is more than likely an advanced system configuration step at this point, or may not be relevant to the service organization. However, if OLAs or UCs are in place in the service organization, they can be mapped into the system now. Alternatively, they may be added later.

8. Customize or create Workflows (See: [Incident & Problem Workflows](#) and [Service Request & Change Workflows](#))

The system includes default Workflows across all Processes. At this point, the default Workflows may be sufficient, or they can be customized to suit the service organization requirements. Alternatively, new Workflows can be created from scratch.

9. Create Teams (See: [Teams](#))

By default the system includes one Process Team and the Unknown Team. Edit the existing Process Team, including defining the way it works, assigning the relevant Technicians, associating the Workflows that the Team will support, and setting the Technicians to work in the appropriate Escalation Layer(s). Teams are to be created for all Processes that are to be managed by the system (i.e., Incident, Problem, Change, Service Request.), although it may be relevant to finish one Process first, and return to do the other Processes at a later date.

10. Assign Default Teams and SLAs within Request Privileges (See: [Setup>Privileges>Requests](#))

Move to *Administrator view* by clicking the Setup link, next to the logged in User Name

These settings will be applied to all newly created Items and Item Types that result from an AMIE import.

11. Configure the CMDB, by first customizing Configuration Categories:

Return to the *Supervisor view* by clicking the User link, next to the logged in User Name.

The system includes a number of default Categories, which should be more than enough for most organizations. Within the Category, the attributes of an Item that are to be recorded in the system, are defined by customizing the field labels. The stages that an Item can move through in its lifecycle are defined within the Life Cycle tab (i.e., Installed>Pending Configuration>Pending Test,etc). The types of issues reported against an Item are then created in the Classifications tab.

Configure the Category Details Fields (See: [Configuration Categories](#))

Define the Category's Life Cycle (See: [Category Life Cycle](#))

Create Category Classifications (See: [Category Classifications](#))

#### 12. Create Service Type templates and Service Items

For service organizations wanting to fast-track the capability to manage requests in the system, it is advised to create Service Items in the [Service Catalog](#) to allow Customers and Technicians to log and manage requests within the application. Create a Type using the Service Category for each Service being offered, then create the Service Item with the newly created Type template. For the Service to be available in the Catalog, be sure the Service Item status is set to an Active, non Pre-production State. If the Customers are to access a Service on the Customer Portal, the Service Item Lifecycle State should also be set to Customer Visible.

#### 13. Create Item Types (See:[Item Types](#))

If the Types are not to be automatically created as part of an AMIE or .csv import, this is done in the Configuration>Types tab. This is where the Category template is associated with the Type template, the default Teams and SLA are set, and the Classifications for issues reported against Items are refined.

If Items are to be imported via a .csv file or AMIE proceed to Step 14.

#### 14. Within the *Admin>Setup tab*, complete the Item Import (See: [AMIE Import](#) or [CSV Import](#)).

After the Items are successfully imported, a Supervisor User will need to refine the Type templates created as part of the import, if the default settings do not apply to a newly created Item Type. This task does not need to be completed immediately, and can be done on an ad hoc basis (i.e., whenever a Type template is opened in Edit mode, before saving, the system will prompt the User to set any required information.)

#### 15. Within the *Supervisor>Configuration tab*, create Items. (See: [Items](#))

If Items are to be created directly within the system, this is completed in the Configuration>Items tab. An Item Type template is selected for the new Item, which applies all the default information set within the Categories and Types tabs, then ownership of the Item is assigned to the new Item. Ownership can be Everyone (i.e., a Global Item), one or more specific Customers or Organizational Units. The specific attributes of the Item are recorded in the Details tab, and any relationships with other Items in the system can be created within the Relationships tab, now or at some point in the future.

Items can be mapped to Services, if required. (See: [Service Catalog](#).)

## 1.3.1 Implementing the Processes

For information and steps for implementing for the following Processes, refer to:

- ◆ [Request Fulfillment](#)
- ◆ [Incident Management](#)
- ◆ [Problem Management](#)
- ◆ [Change Management](#)
- ◆ [Release & Deployment Management](#).

## 1.4 Users

Users within the service management system that are assigned to support Teams must be allocated one of the following Roles:

- ◆ Technician
- ◆ Supervisor
- ◆ Partner.




The above User Roles can work on requests, relevant to the Processes they have been allocated (i.e., Incident, Problem, Change or Service Requests). The About Roles section of the User Guide provides more information regarding specific User Roles in the system.

### 1.4.1 User Availability

The User List View includes the User Availability status by default, this is based on work hours configured in the Schedule tab of the User and their Vacation Status.

The following icons may be displayed in the List View:

---

| Available   |   |
|---|---|
|    | The User is not on leave and is available for request assignment based on their assigned work hours.  |
|    | The User is not on leave but is not available for request assignment based on their assigned work hours.<br><br>Or, if no hours are set within the Schedule tab when the "Define Works Hours" is enabled within Admin>Setup>Privileges>User screen and the User is not on vacation, the system will consider Users to be unavailable. |
|  | The User is On Vacation. If the User logs into the system when assigned this status, they will not have to the User Portal. However, if they are also have Customer Web Access, when they log in to the system they default to the Customer Portal.   |

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### 1.4.2 Creating a User Account

When creating a new User, the following tabs are available:

- ◆ Information
- ◆ Aliases
- ◆ Team
- ◆ Skills
- ◆ Types.

### 1.4.3 Information Tab

Within the User Information tab, User details can be created, viewed and edited. User Roles, Process assignment and default Login credentials can all be customized within this tab.

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**NOTE:** If Custom Fields are to be created for User Information, it is recommended that the Administrator complete the customization prior to creating Users.

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To create a new User:

1. Select User>Users
2. Click New
3. The User Information screen appears.

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#### User Information Fields

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|                      |   |
|----------------------|---|
| Title                | Select a title from the drop-down menu options. (This field is displayed if the Enable Titles option is set to Yes in the Admin>Setup>Setup>Privileges>Customer tab.)   |
| First Name*          | Enter the User's First Name.  |
| Last Name*           | Enter the User's Last Name.   |
| User Name*           | Enter a User Name (unique).   |
| Password*            | Enter a User Password. Note: Passwords can be changed under the Users Tab or reset by the User under their My Account tab.  |
| Roles*               | Assign a Role for the User. Each Role has associated permissions. See <a href="#">Roles</a> .<br><br>Every Technician Role assigned also needs a Supervisor assigned.<br><br><b>NOTE:</b> Note: More than one Role can be assigned but only one of Supervisor, Partner or Technician can be allocated per User. |
| Default Portal*      | The Default Portal is the User Interface accessed by default when a User with multiple Roles logs into the system.<br><br><b>NOTE:</b> If the Users Default Portal is set to Customer, the User details will not be accessible in the Users list, but included in the list within the User>Customer tab.        |
| Assignment Template  | This option is visible in a new User Information screen if Job Assignment Templates are configured in the User> Assignments tab.<br><br>Select a template to assign the new User to multiple Teams, Escalation layers and Processes.  |
| Operations Processes | Assign the licensed access for Request Fulfilment, Incident and Problem Management.<br><br>Assigning Processes to the User gives them access to support those Processes and enables them to be assigned as Team members for those Processes' Teams.<br><br>See <a href="#">User Processes</a> .                 |

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## User Information Fields

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|                    |  |
|--------------------|--|
| Change Processes   | Assign the licensed access for Change, Release and Deployment Management. Note, Users assigned Release are automatically assigned Deployment.  |
| Internal Processes | Enable the Users privilege to maintain Service Level, Configuration and Knowledge Management.<br><br>Selecting the Configuration and Knowledge options displays the relevant fields that enable granular controls to be set for those processes.<br><br><b>NOTE:</b> The Finance Role is limited to the processes of Configuration and Service Level Management.   |
| Knowledge          | If the User is assigned the Knowledge Management process, their privilege to create, edit, delete and/or publish KBAs can be configured.   |
| Configuration      | If the User is assigned the Configuration Management process, their privilege to create, edit and/or delete Items within the CMDB can be configured on a per task basis.   |
| Customer Org Unit  | If the User is also allocated a Customer Role within the system, this field is displayed. Enter Company or Department details that apply to the User in their Customer Role.   |
| Line Manager       | (This field is visible if the User is also assign a Customer Role within the system. The information can not be edited if the line manager details are set by the LDAP synch.)<br><br>If relevant, assign a system user with the Customer Role who can approve/reject requests made by this Customer.  |
| Primary Email*     | Enter the User's email address. System messages are sent to this address.  |
| Send To            | This field becomes available for Users that have the Customer Role and have alternate email addresses entered on the Aliases tab.<br><br>Select the most appropriate email address to be set as the default address applied to Customer correspondence. When the Send To field is set to an alias address the Primary Email address is not included in the cc list, unless specified in the request Information tab cc list. |
| Phone              | Enter telephone details.   |

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## User Information Fields

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|                 |   |
|-----------------|---|
| Mobile          | <p>A mobile number can be entered as a contact number or for use with SMS (Short Mail Service message). An SMS can be sent to notify the assigned Technician when a Service Request is raised.</p> <p>SMS Messaging options:</p> <ul style="list-style-type: none"><li>◆ From the drop down list, select the SMS service provider.</li><li>◆ Override SMS Address. If your service provider does not appear in the list, click this checkbox and enter an alternate Service Provider.</li></ul> |
| SMS Override    | <p>Enter SMS Gateway override details for the User, if a number other than the one entered in the Mobile field is to be used to send/receive updates via SMS. Enter the complete SMS details in email address format, i.e.,<br/>000777891@smsgateway.provider.com.</p>  |
| Fax             | <p>Enter known fax details.</p>   |
| Pager           | <p>Enter pager details.</p>   |
| Salary          | <p>An annual salary can be entered. This value is used for reporting.</p>   |
| Forum Moderator | <p>Select this checkbox to designate this User as a forum moderator. See Forums.</p>  |
| Survey Manager  | <p>Select this checkbox to enable this User to create and manage surveys in the system.</p>   |
| Supervisor*     | <p>Select a Supervisor, if the User has a technician role. Users with the Technician Role must be allocated a Supervisor.</p>   |
| Partner For     | <p>When a User is assigned the Partner Role, their associated Partner Organization must be assigned within this field.</p>  |
| Partner         | <p>If the User is also assigned a Customer Role, this field allows the Customer to be associated with a Partner Organization who will handle their requests when they are logged in the system.</p>   |
| Available       | <p>Shows if the User is available for requests to be assigned to them. This is based on work hours configured in the Schedule tab of the User and their Vacation Status. If no hours are set within the Schedule tab when the "Define Works Hours" is enabled within Admin&gt;Setup&gt;Privileges&gt;User screen and the User is not on vacation, the system will consider them to be unavailable.</p>  |

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## User Information Fields

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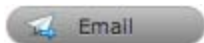
|              |   |
|--------------|---|
| Assignment   | **Visible when the Assignment Control is enabled in Admin>Setup>Privileges>User.<br><br>Set to Off if the User is not to be assigned new requests, irrespective of their Availability status.     |
| On Vacation  | Placing a Technician on vacation excludes them from being assigned new requests automatically. When On Vacation is activated a Technician's existing requests are not reassigned.                 |
| Training     | This option is only visible for Technician Users, and when enabled allows the User to be included in Teams to view requests but does not allow them to put the request in edit mode or add Notes. |
| Email Locale | Adjust the default language for email correspondence, if required.  |
| Country      | The User automatically adopts the default Country set for the system. However, the Country can be manually adjusted here for the specific User.   |
| State        | Set the State information based on the Country selected, if required.   |
| Timezone     | The User automatically adopts the default Timezone set for the system. However, the Timezone can be manually adjusted for the specific User.  |
| GPS          | The GPS coordinates of the last known address.  |

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\* Denotes Mandatory Fields

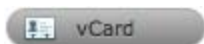
1. Complete the User detail information
2. Click Done.

## Emailing User Details



To email a User regarding their system log in credentials, click the Email button within the User Information screen. If Random Passwords is enabled, selecting Email will reset the Password and forward the details to the User. If Password Questions is enabled in Setup>Privileges>System, selecting Email will send a link to the User directing them to a page that includes the security questions set for their account and reset the password based on the answers provided. Customers must complete this process within an hour of the email being sent.

## vCard Button



Select this option to download and open the User's information in an electronic business card format, to email or save outside the system.

## 1.4.4 Schedule Tab

By default the Schedule tab includes the On Vacation option, which can be set to Yes when the User takes leave. The system will automatically re-assign the User's active requests, if the Vacation Reassign option has been enabled in the Admin>Setup>Privileges>User tab. If this option has not been enabled, a Supervisor User will need to manually re-assign the requests, if required.

If the system Setup has been configured to Define Work Hours and Schedule Vacations, this additional functionality is available within the Schedule tab.

The screenshot shows the 'User Information' window for 'Calvin Johns'. The 'Schedule' tab is active. Under 'Working Hours', the 'Relative To' is '(GMT +10:00) Melbourne, Sydney, Canberra, Port Moresby'. The 'Apply Template' is set to a dropdown menu. The working hours are defined as follows:

| Day       | Start Time    | End Time      |
|-----------|---------------|---------------|
| Sunday    | <unavailable> | <unavailable> |
| Monday    | 09:00         | 17:00         |
| Tuesday   | 09:00         | 17:00         |
| Wednesday | 09:00         | 17:00         |
| Thursday  | 09:00         | 17:00         |
| Friday    | 09:00         | 17:00         |
| Saturday  | <unavailable> | <unavailable> |

Under 'Holidays', the 'On Vacation' option is set to 'No'. There are '+' and '-' buttons for the 'Schedule' section. Below this is a table with columns: Purpose, Start Date, End Date, and Active. The table currently shows '0 - 0 of 0 Results'. At the bottom right are 'Cancel' and 'Save' buttons.

### Define Work Hours

Use the drop-down lists to set the hours of work the User is available for the week. Based on what is set here, the system will assign requests to the User during their available hours. However, if no other Technician is available for requests based on their defined work hours, the system will assign the User new requests outside of their set work hours.

---

**NOTE:** If the Technician Define Work Hours option has been enabled, the hours of work MUST be defined, otherwise the system will ignore the Technician Assignment logic and automatically allocate new requests to the Team Lead.


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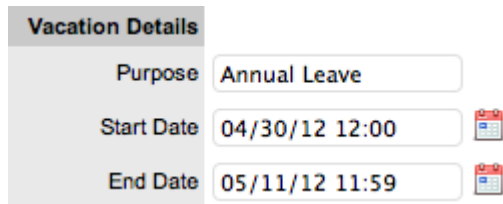
### Schedule Holidays

The Schedule Holidays functionality allows the Supervisor to pre-book leave in the system for Users. There are no restrictions on the number of days that can be set, and based on the configuration, when a leave period is activated, the system will automatically re-assign active requests to other available

Users applying the [Technician Assignment](#) logic. If the request was initially drawn from an Incident Queue, it will not return to the Queue but be reassigned to the most relevant Technician based on the Technician Assignment logic.

As a Supervisor User, to schedule User leave:

1. Go to the Users>User option
2. Select the hyperlink name of the User
3. Move to the Schedule tab
4. Click Edit, to activate edit mode
5. In the Schedule field, select   
The Vacation Details window is expanded.
6. Enter the reason for leave in the Purpose box



7. Complete the Start and End date details
8. Click Save.

The details are recorded in the database and when the Start Date is reached, new requests will not be assigned to the User. After the scheduled End Date, the User account will be automatically re-activated.



---

**NOTE:** It should be noted that if the User on vacation is a Team Lead for any Teams where there are no Technicians available for new request assignment, the system will allocate new requests to the Team Lead, regardless of their vacation status.

---

The Supervisor Events calendar in the Home tab shows when Users are on Vacation:

| May 2012          |                    |     |     |     |     |     | month           | week             | day          |                 |                    |                 |
|-------------------|--------------------|-----|-----|-----|-----|-----|-----------------|------------------|--------------|-----------------|--------------------|-----------------|
| Sun               | Mon                | Tue | Wed | Thu | Fri | Sat | Legend          |                  |              |                 |                    |                 |
| 29                | 30<br>Calvin Johns | 1   | 2   | 3   | 4   | 5   | Public Holidays | Technician Leave | Requests Due | Planned Outages | Scheduled Requests | Change Schedule |
| 6<br>Calvin Johns | 7                  | 8   | 9   | 10  | 11  | 12  |                 |                  |              |                 |                    |                 |

## 1.4.5 Aliases Tab

**NOTE:** This is only applicable if the User has the Customer Role.

Use the Aliases tab to enter additional email addresses. The system creates requests from emails sent to the system account from a valid email address. Email addresses in the Aliases tab allow the User to send emails to the system account from more than one address. Notifications for requests created using an address in the Aliases tab, are sent to the main email address and cc'd to the alias address that was used to create the request.

When one or more alias email addresses have been created for a Customer, a Send To field is displayed on the Customer Information screen, which allows the most appropriate email address to be set as the default address applied to Customer correspondence. When the Send To field is set to an alias address the Primary Email address is not included in the cc list, unless specified in the request Information tab cc list.

The screenshot shows the 'User Information' window for 'Calvin Johns'. The 'Aliases' tab is selected, showing a list of email addresses. The list contains one entry: 'calvinjohns@netrelief.com'. There are 'Add' and 'Remove' buttons at the top, and a 'Done' button at the bottom right. The status bar indicates '1 - 1 of 1 Results'.

To add an alias email address:

1. Select User>Users.
2. Click on the User name  
The User Information screen appears.
3. Select the Aliases tab
4. Click Edit to access the Add button
5. Click Add
6. Enter an alias email address

7. Click Save.

When an alias email address has been created for a Customer, a Send To field is displayed on the Customer Information screen, which allows the alias email address to be set as the default address applied to Customer correspondence.

---

**NOTE:** An alias will only be used if the User has a Customer Role.

---

To remove an Alias Email Address, in Edit mode, tick the checkbox next to the Email Address and click the Remove button.

## 1.4.6 Team Tab

The User Team tab lists Teams associated with the selected User. Use this section to assign the User to one or more support Teams, making the additions by Team or job Assignment templates that have been configured in the system. Processes selected in the Information tab for the User determine the Teams available in the Team tab.

Once a User is assigned to the Team, the Supervisor must configure the escalation layers for the Team to include the new User. However, the User can easily be added to Layer One of escalation when associated with a new Team by ticking the Assign new users to layer one option when assigning the Team within this tab. Also, if Assignment templates are created in the system, by selecting Team Template, the User will automatically be added to Teams, Escalation Layers and Work Groups configured within the selected Template.

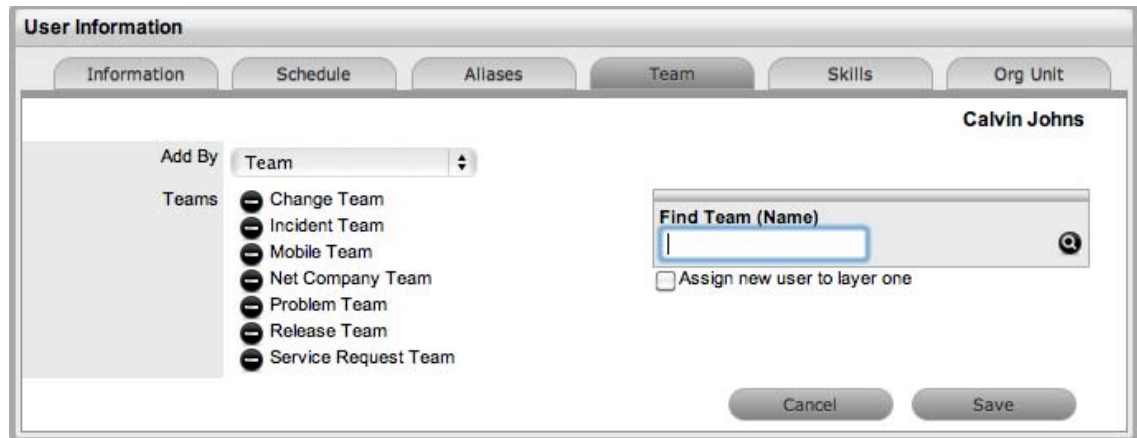
---



**NOTE:** The User must be assigned the relevant Processes for Support Teams to be shown in Team search results. If an Assignment template is selected and includes Teams for Processes the current User is not allocated, those Teams will not be included on the Template.

---

To add a User to a Team within the Team tab:

1. Click Edit



2. Using Add By Team, enter a Team Name in the Find Team field and click  or leave the field empty and click 
3. Tick "Assign new user to layer one", if relevant
4. Select a Support Team link

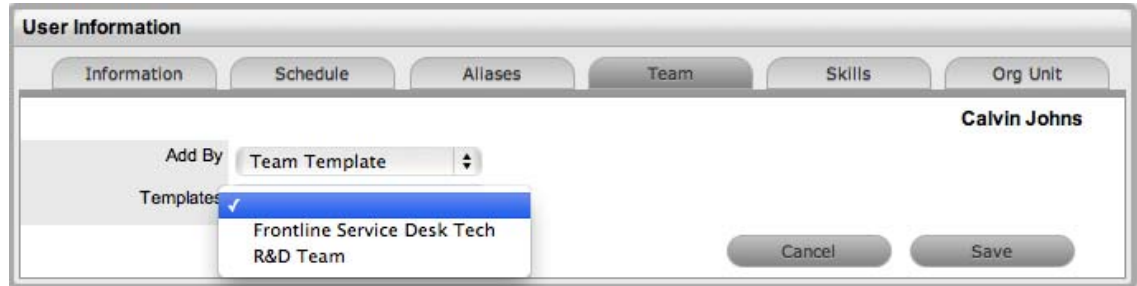
The User is assigned to the Team and layer one of escalation if appropriate.

5. Click Save.

To add a User to a Team within the Team tab using Assignment templates:

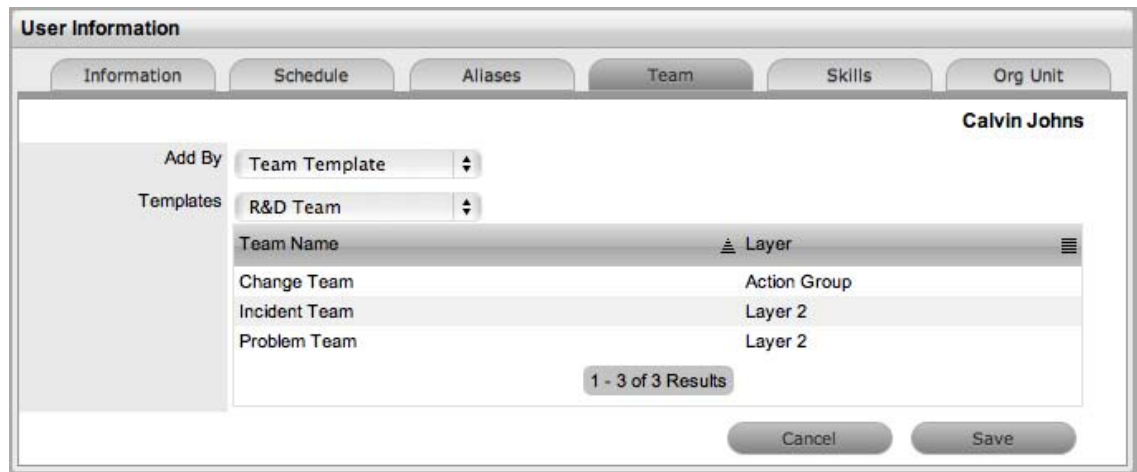
1. Click Edit
2. Within the Add By field, select Team Template

Job Assignment Templates that have been configured in the User>Assignments tab are displayed, but only including Teams consistent with the Processes assigned to the User




3. Select one or more Template options
4. Click Save

The User is automatically included in the Teams, Escalation Layers and Work Groups configured in the Template.



To remove a User from a Team:

1. Select User>Users  
The User Information screen appears.
2. Click on the name of the User
3. Select the Team tab
4. Click Edit
5. Select  to remove a Team assignment
6. Click Save
7. Click Done.



- 
8. **NOTE:** If a User is the Team Lead or the only person assigned to an escalation layer they cannot be removed from a Team under this tab.
- 

## 1.4.7 Skills Tab

Use this section to assign any specific Classifications that are to be handled by a Supervisor, Technician or Partner. This assignment assumes areas of expertise for Users assigned to these Classifications. This allows the system to automatically route requests logged against these Classifications to the most appropriate User.

---

**NOTE:** Prior to using the Skills tab, Items and Classifications should be configured.

---

### Assigning a Classification

To assign a Classification:

1. Select User>Users>Skills
2. Click Edit to display the Add button
3. Click Add
4. Select the Item Category

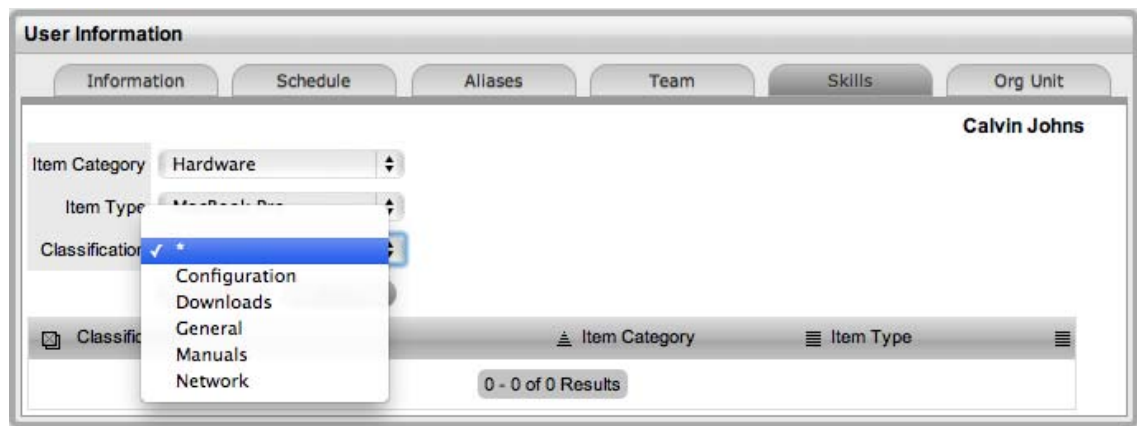
The Item Type and Classification Type drop-down list is displayed.



The screenshot shows a software interface window titled "User Information" for user "Calvin Johns". The "Skills" tab is active. There is a dropdown menu for "Item Category" with a blue border. Below it are "Cancel" and "Save" buttons. A table below the buttons has columns for "Classification", "Item Category", and "Item Type". The table is currently empty, with a status bar at the bottom indicating "0 - 0 of 0 Results".

5. Choose an Item Type, if relevant
6. Select \* to assign all Classifications as Skills or choose a specific Classification

The list displayed will include all Classifications configured for the Item Category and the Item Type, if an Item Type is selected.



7. Click Save
8. Click Done.

---

**NOTE:** The Classification assigned to the User is either based on the Classifications of an Item Category or Item Type, hence displaying two columns. However, the Item Type column will only include information when the Classification selected is specific to that Item Type, and not directly related to the Item Category.

---

To remove a Classification:

1. Select User>Users
  - The User Information screen appears.
2. Click on the name of the User
3. In the Skills tab, click Edit
  - The Delete button appears at the bottom right.
4. Click the checkbox next to the Classification. Multiple Classifications can be checked
5. Click Remove
6. Click Done.

---

**NOTE:** The Classification assigned to the User is either based on the Classifications of an Item Category or Item Type, hence displaying two columns. However, the Item Type column will only include information when the Classification selected is specific to that Item Type, and not directly related to the Item Category.

---

## 1.4.8 Org Units

Use this section to assign one or more Org Units to a Supervisor, Technician or Partner, which will result in requests that are logged by these Org Units being routed to the assigned Users. When Users are assigned to support Organizational Units, the Find Customer option during the request creation process, displays the Supported Org. Units Only option. This limits the Customer search results to those Customers who belong to the Org. Units the logged in Technician is assigned to support.

## Assigning an Org Unit

To assign an Org Unit:

1. Select User>Users>Org Units
2. Click Edit to display the Find Org. Unit search field
3. Enter any known Org Unit details or leave the field blank to return the full list of Org Units recorded in the system

4. Click
5. Click on the Org Unit name hyperlink to associate it with the User  
Multiple selections may be made, if required.
6. Click Save.

## Removing an Org Unit

To remove the association between a User and an Org Unit:

1. Select User>Users  
The User Information screen appears.
2. Click on the name of the User
3. In the Org Unit tab, click Edit
4. Select next to the relevant Org Unit

The Org Unit details are removed from the tab.

5. Click Save
6. Click Done.

## 1.5 Technician Assignment

The logic behind Technician Assignment within the system is more than the application basing the allocation on the Technician location, load or skill set, as more extensive parameters are considered when routing requests to Technicians. By understanding the variables within the assignment process, Users can configure the system to better reflect the workflow of its service support Team environment.

When a request is logged with the service desk, the Team is selected based on the SLA and Workflow State of the request.

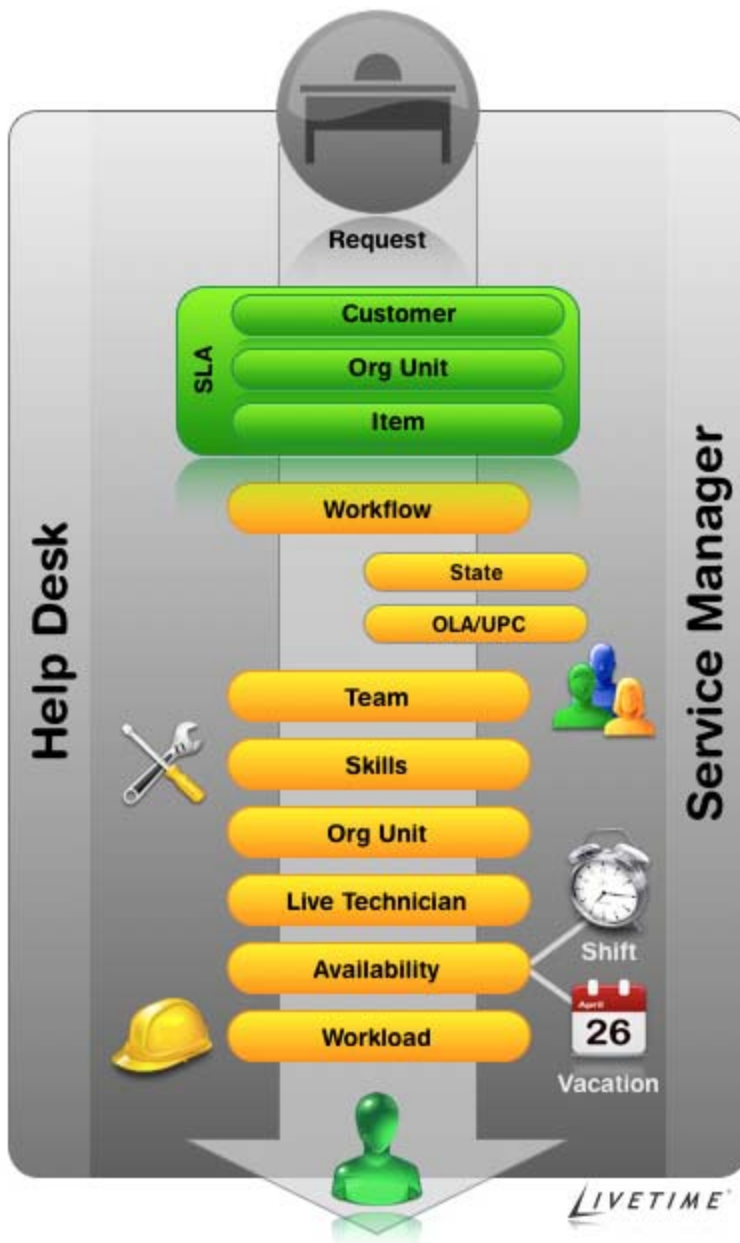


Figure 1: Request assignment logic

After the Team has been assigned to the request, the application:

1. Checks if the Team has escalation layers, and validates the capability of Technicians in Layer or Group associated with the request
2. To make an assignment within the layer or group, the system checks if Technicians are assigned areas of specialty - Skills or Classifications. If so, the system matches the Classification of the request with the Classifications supported by the Technician
3. If multiple Technicians are assigned the relevant Classification, or if specific Classifications are not assigned to the Technicians within the Team, then the system verifies if Team members have been assigned to support specific Organizational Units. If so, the application will match the Organizational Unit of the Customer to the Technician

4. If the Team "Live Priority" feature has been enabled, the system checks for Team Technicians logged into the application. If multiple matches have been made between the Technician Skills and the request's Classification, and the Org Unit of the Customer and Technician, the system checks for technicians logged into the application. However, if no match is made between the Skills and Organizational Unit, it will still check for the logged in User if the Live Priority Team functionality is active
5. If there are multiple valid Technicians based on Skill, Org Unit and/or Logged In User, the application will allocate the request to a Technician with the lightest request load.

---

**NOTE:** It should be noted that if the Technician Define Work Hours option has been enabled in the Admin>Setup>Privileges>User, the hours of work **MUST** be defined within the Super>User>Users>Schedule tab, otherwise the system will ignore the Technician Assignment logic and automatically allocate new requests to the Team Lead.

---

Please note that these are not only the forces that govern request assignment. Other factors that determine the routing of requests include the Team assigned to Workflow State, the Technician assignment privilege and if request Queues are enabled.

## 1.5.1 Service Manager and Workflow States

Within Service Manager the pool of Technicians that can be assigned to a request is increased by the OLA or Underpinning Contract assigned to the Workflow State of the request.

Service Manager allows Workflow States to be governed by internal or external contracts, known as OLAs or Underpinning Contracts, respectively. OLAs can be assigned to different support Teams, which means if the Team changes as a result of the Workflow State change, the request may be routed to a whole new pool of Technicians.

If the Workflow is supported by an Underpinning Contract, the request is assigned internally to the responsibility of the Service Level Manager.

## 1.5.2 Self Assign Option

The Self Assign functionality allows the application to override the business logic of request assignment. This feature enables the automatic allocation of requests to the Technician who creates the request. A Supervisor User can activate Self Assign for requests on a per Team basis, within the Team Information screen.

## 1.5.3 Request Queues

That about covers the automated routing of requests, but support Teams who prefer to create a queue or holding bay for newly created requests, are also catered for within the system.

Queues are activated on a per Team basis. This means, where one support Team may use the automated routing process, another can create a holding bay. The holding bay allows Technicians to choose their jobs from the Queue, as opposed to having requests automatically assigned by the system.

The Administrator User can activate the Queues feature in the application Setup>Privileges>Requests tab. The Supervisor User then enables the option within the Team Information screen, as required. New requests assigned to a Team with this preference enabled, are assigned to the System User. To access requests held in the Queue, Technicians use the Request Queue Filter within the Home Tab.

The request can then be re-assigned to a specific Technician within the Summary Tab of the request. See: [Queues](#).

## 1.6 Organizational Units

Customers can be assigned to a Company within the system. This can be refined by allocating the Customer to a Department, and if relevant, to a specific Room. This information is stored within the Organizational Unit details.

---

**NOTE:** Companies can exist without Departments, but Departments and Rooms can only be created as part of Company information.

Technicians can also be assigned to service specific Organizational Units.

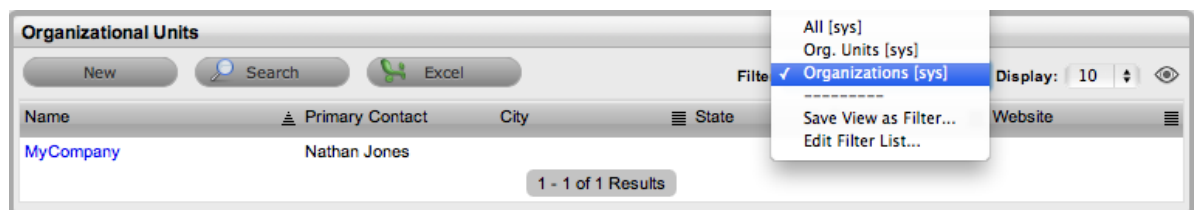
---

### 1.6.1 Organizational Unit Filters

The Organizational Unit list can be filtered to display the following views:

| System List Filters | Description  |
|---------------------|--|
| Organizations       | Shows the Companies supported by the service desk.           |
| Org. Units          | Lists all Departments included within Companies.             |
| All                 | Lists complete Org Units, with Company and Department names. |

To change the List View, select the relevant option from the Filter list.



### 1.6.2 Organizational Units and External Authentication

Organizational Unit relationships can also be mapped from an authentication server. By default this is not enabled. To activate Customer Organizational Unit mapping, as an Administrator go to the Advanced tab for the selected authentication server within Admin>Setup>Authentication. Select Yes for the Import Customer Organizational Units option.

Import Customer Org Units  Yes  No

Company  Standard  Custom  
o

Department  Standard  Custom  
ou

Cancel Save

**NOTE:** The details of the Org. Units are not populated upon this synch, only the Org Unit names. For the Org Unit details to be assigned to Customer or User Information, create the Org Unit in the Supervisor>User>Org Units tab and ensure the Org Unit name is identical to what is stored in the authentication server. If the details are not identical, the system will create another Org. Unit.

### 1.6.3 Details Tab

Use the Details tab to create an Organizational Unit.

#### Creating an Organizational Unit

To create an Organizational Unit:

1. Select User>Organizational Units
2. Click New
3. Complete the Organizational Unit Name
4. Select Organizations or Org. Units within the Filter drop-down list

**Org. Unit Information**

Details Customers Technicians Items Requests Contracts

**Information**

Name

Org. Unit Type  Company  
Department

Org. Unit Code

Address 1

Address 2

City

Zip

Country

Phone

URL

Email

**Notes**

**Handshaking**

Override  Yes  No

**Partner**

Customer of

Cancel Save



5. Enter other details, if required
6. Select Handshaking override option, if relevant
 

If the System Default Handshaking Close Action days is to be adjusted for the Org. Unit, select Yes in the Handshaking Override field. Enter the number of Days to lapse before a request will close if the Customer does not respond to the handshake email notification.
7. If appropriate, set the Partner Organization
 

(The Partner Organization is an external service provider that includes Partner Users who can manage requests logged with the system for Customers associated with the Company or Department being created.)
8. Click Save.

## Primary Contact

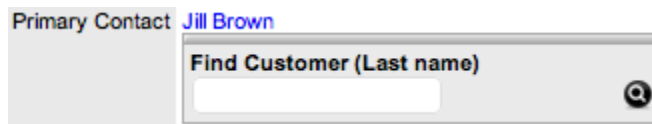
When multiple Customers are assigned to an Organizational Unit, a Primary Contact person can be allocated for the Org Unit. This is the preferred person the Service Desk will contact for issues relating to the Org Unit.

To assign a Primary Contact:

1. Select User>Organizational Units
2. Select an Org Unit Name
 

The Details tab is displayed. If Customers have been assigned to the Org Unit a Primary Contact field will be visible.
3. Within the Details tab, click Edit
 

The Find Customer box is displayed. (Note that this search is only visible when Customers have been assigned to the Org. Unit)



4. Search for the Customer
 

To view all available Customers click Search without entering a Customer last name in the search field.
5. Click the Customer name to assign them as the Primary Contact
6. Click Save.

## Default Item

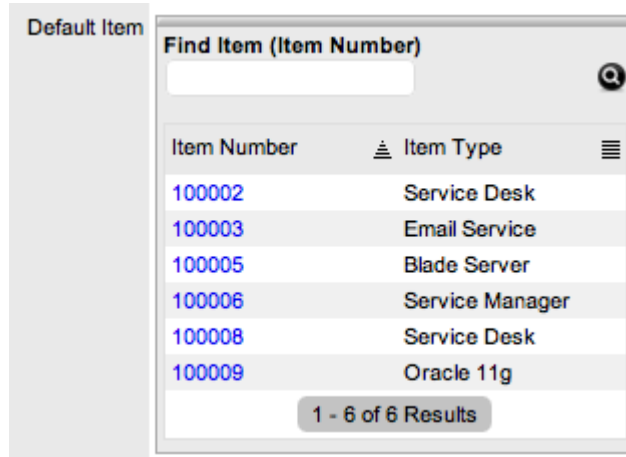
When an Organizational Unit owns multiple Items, within the Default Item field an Item can be used as the one to be automatically applied to all requests created via email for the Organizational Unit.

To assign a Default Item:

1. Select User>Organizational Units
2. Select an Org Unit Name
 

The Details tab is displayed with the Default Item visible at the bottom of the first column.
3. Within the Details tab, click Edit

The Find Item box is displayed.



4. Search for the Item

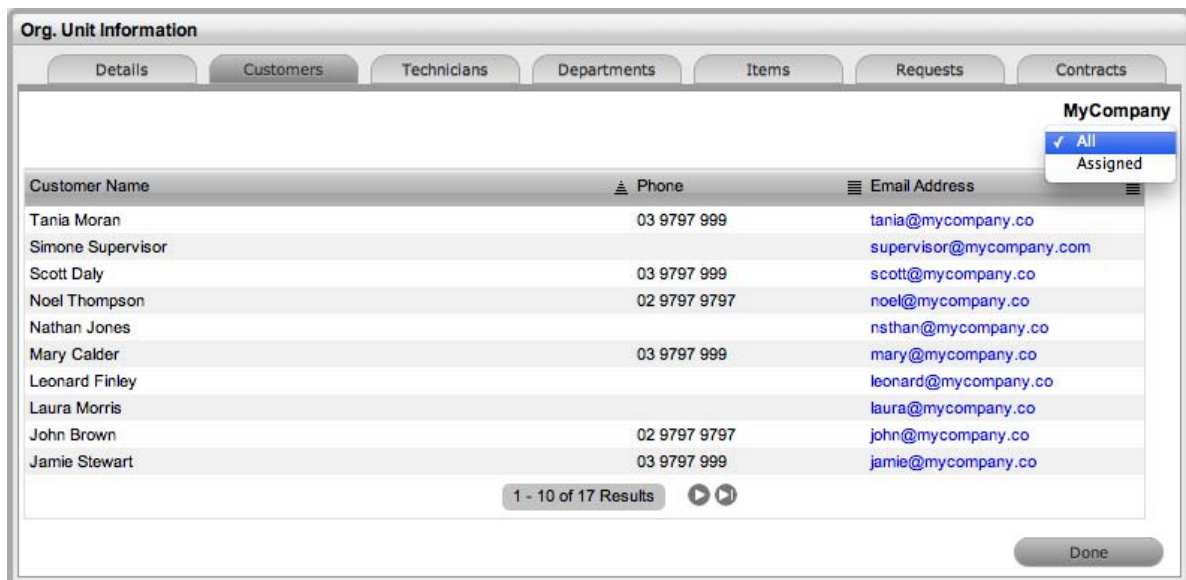
To view all available Items click without entering an Item Number in the search field.

5. Click the Item Number link to assign it as the Default Item

6. Click Save.

## 1.6.4 Customers Tab

This tab displays all Customers assigned to the Organizational Unit. Customers cannot be added within this screen, as they are allocated to Org. Units when they are created or through the User>Customer>Customer Information screen. The list can be filtered based on Customers directly assigned to the Org. Unit, or all Customers associated with Company Org. Units including those associated with related Departments.



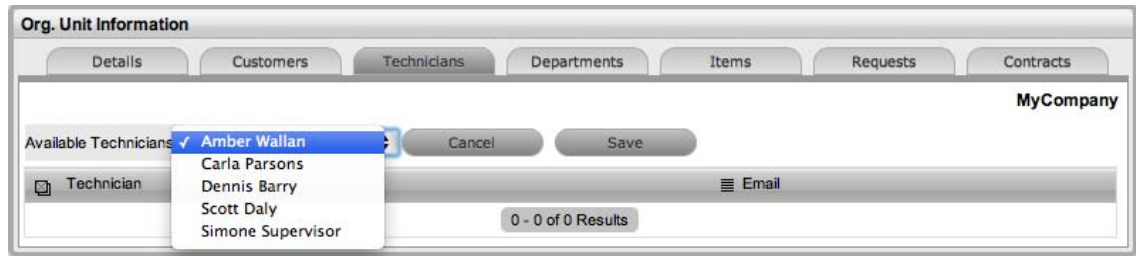
## 1.6.5 Technicians Tab

The Technicians tab allows support technicians to be assigned as key support staff for an Org. Unit. This means when requests are created, the system checks if the Item's Organizational Unit has Technicians assigned to service its request. If so, the request is routed to a Technician assigned to the Org. Unit.

### Assigning a Technician to an Organizational Unit

To assign a Technician to an Organizational Unit:

1. Select User>Organizational Units
2. Select Org Unit Name
3. Move to the Technicians tab
4. Click Edit
5. Click New



6. Select a Technician name from the drop-down list
7. Click Save
8. Select Done.

### Deleting a Technician Assignment

To delete a Technician assignment:

1. Select User>Organizational Units
2. Select the Org Unit Name
3. Move to the Technicians tab
4. Click Edit
5. Tick the checkbox next to the Technician name
6. Click Delete
7. Click Done.

## 1.6.6 Departments Tab

The Departments tab allows Company group information to be refined. Departments are created for a Company within the Departments Tab.

## Creating a Department

To create a Department:

1. Select User>Organizational Units
2. Select Org Unit Company Name
3. Move to the Departments tab

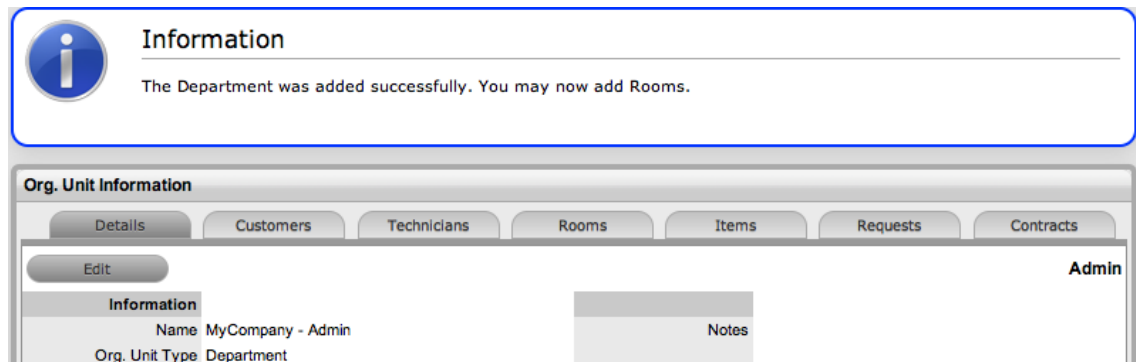


4. Click New
5. Enter the Department Name
6. Enter other details, if required
7. Select Handshaking override option, if relevant

If the System Default Handshaking Close Action days is to be adjusted for the Org. Unit, select Yes in the Handshaking Override field. Enter the number of Days to lapse before a request will close if the Customer does not respond to the handshake email notification.

8. Click Done

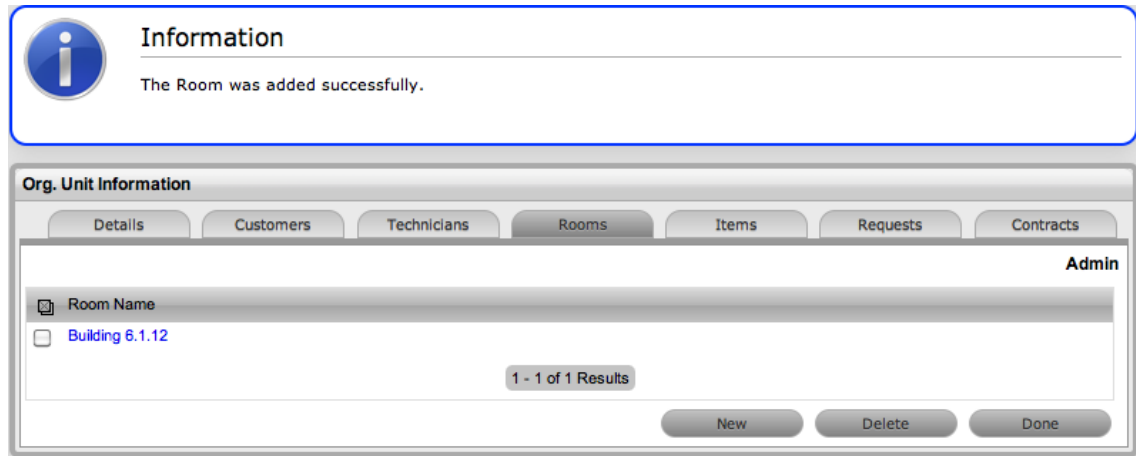
The system will move to the Department Editor, to allow Rooms to be added to the Department.



9. Select the Rooms tab if Rooms are to be added immediately
10. Click Edit
11. Select New



12. Enter the Room details
13. Click Save
14. Click New to add another Room or select Done.



## Edit a Department

Department details are edited through the *Org. Units Filter of the Organizational Unit list*.

To edit a Department:

1. Go to User > Org Units
2. Select the filter option Org.Units (sys)
3. Select a Department from the list provided
4. Click Edit
5. Modify the details as necessary
6. Select Save.

### 1.6.7 Rooms Tab

To expand Department details, Room locations can be created. This allows Customers to be assigned to specific locations within an Organizational Unit. The Rooms tab is only visible for Department Org Units that are accessed through the *Org. Unit filter of the Org Unit list*.



## Adding a Room to a Department

To add a Room to a Department:

1. Within the Organizational Units list select the Org.Units filter



2. Select the relevant Department/Org.Unit link
3. Move to the Rooms tab
4. Click Edit
5. Click New
6. Enter the Room Name
7. Click Save.

### 1.6.8 Items Tab

This tab lists all the Items that have been assigned to the Organizational Unit.



### 1.6.9 Requests Tab

This tab lists all requests generated by the Organizational Unit. To view or modify a request, select the Task# hyperlink.



## 1.6.10 Contracts Tab

The Contracts tab displays an Organizational Unit's current contract status. An Organizational Unit can be assigned an SLA or, when Billing is enabled, a Contract that manages the period of time the SLA applies to the Org Unit. When Contracts are enabled, an Organizational Unit can have only one active Contract in the system at any one time and must have an assigned Primary Contract.

To update the Service Level assignment when Contracts are disabled:

1. User>Organization Units
2. Select the required Org Unit  
The Org Unit Information screen will open.
3. Select the Contracts tab, click Edit
4. In SLA Details, using the drop-down menu, select the SLA
5. Select Save.

When Contracts are in use throughout the application, timeframes are set for Service Levels and Contract history is displayed within the Contracts tab. It is also possible to assign a Service Level and/or Contract within the Contracts tab.

The screenshot shows the 'Org. Unit Information' application window with the 'Contracts' tab selected. The window title is 'Org. Unit Information' and the company name is 'MyCompany'. The 'Contract' section displays the following details:

- Service Level: Gold
- Contract #: 10 (with a red 'x' icon)
- Contract Type: Subscription
- Invoice #: 100022
- Start Date: 05/07/12
- End Date: 05/07/13
- Expires: 1 Year 0 Day

Below the details is a table of contract history with the following columns: Contract #, Type, SLA, Invoice #, Start Date, and End Date. The table contains two rows:

| Contract # | Type         | SLA  | Invoice # | Start Date     | End Date       |
|------------|--------------|------|-----------|----------------|----------------|
| 10         | Per Org Unit | Gold | 100022    | 05/07/12 16:13 | 05/07/13 23:59 |
| 6          | Per Org Unit | Gold | 100010    | 05/07/12 00:00 | 05/07/12 14:43 |

The table also includes a '1 - 2 of 2 Results' indicator and 'Add' and 'Delete' buttons. At the bottom of the window are 'Cancel' and 'Save' buttons.

To create a new Contract for an Organizational Unit:

**NOTE:** To assign a Contract to an Org Unit, a Primary Contact must be nominated for the Org Unit or the system will prompt the User to assign a Primary Contact during the Contract assignment process. This means, prior to creating the Contract assign at least one Customer to the Org Unit and then designate a Customer as the Primary Contact. To assign a primary contact:

1. Select User>Organizational Units
2. Select an Org Unit Name  
The Details tab is displayed. If Customers have been assigned to the Org Unit a Primary Contact field will be visible.
3. Within the Details tab, click Edit  
The Find Customer box is displayed. (Note that this search is only visible when customers have been assigned to the org unit)

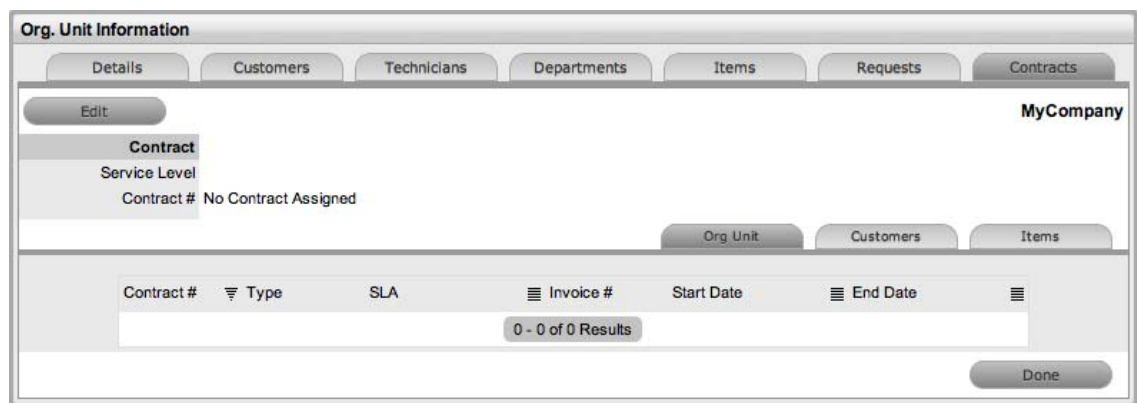
Primary Contact **Find Customer (Last name)**

 Search

4. Search for the Customer. To view all available customers click Search without entering a customer last name in the search field
5. Click the Customer name to assign them as the Primary Contact
6. Click Save.

To create a new Contract for an Organizational Unit:

1. Select User> Organizational Units
2. Select the Organizational Unit's Name
3. Move to the Contracts tab



**Org. Unit Information**

Details Customers Technicians Departments Items Requests **Contracts**

Edit MyCompany

**Contract**

Service Level

Contract # No Contract Assigned

Org Unit Customers Items

| Contract #         | Type | SLA | Invoice # | Start Date | End Date |
|--------------------|------|-----|-----------|------------|----------|
| 0 - 0 of 0 Results |      |     |           |            |          |

Done

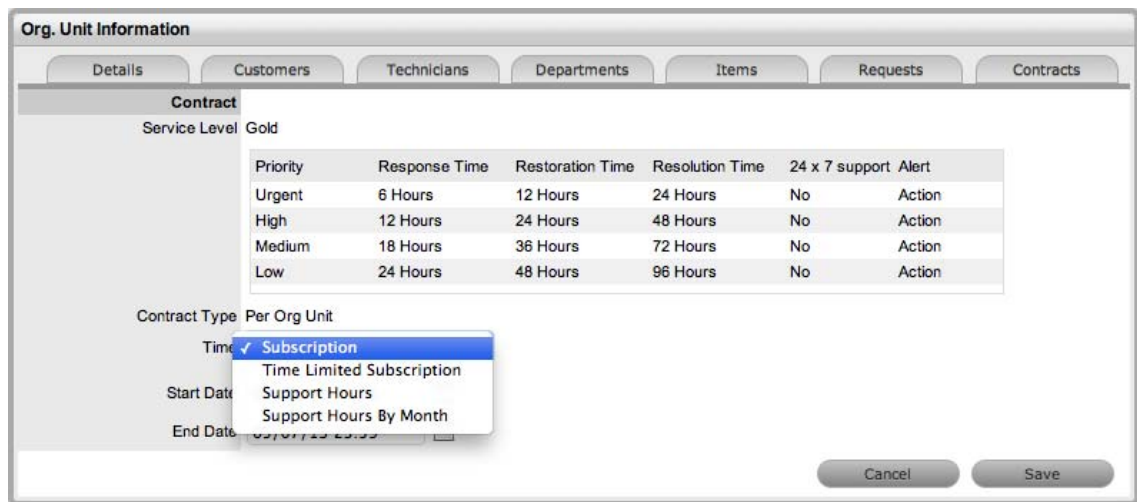
4. Click Edit
 

The Add and Delete buttons become available with the Contracts>Org Unit tab.
5. Click Add
 

If a Primary Contact has not been assigned to the Org Unit a system prompt will notify the User to create a Primary Contact. See: [Primary Contact](#).
6. Select a Service Level from the list
 

When selected, the screen expands to display start and end date fields.





- For the Per Org Unit Contract Type the Time Period for the Contract can be defined as one of the following:

*Subscription* if selected, the Start and End Dates are automatically set to a year from the date of creation, but can be edited if required.

*Time Limited Subscription* if selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually by entering the length of time for the subscription period, or the system will default to entering a year from the date of creation.

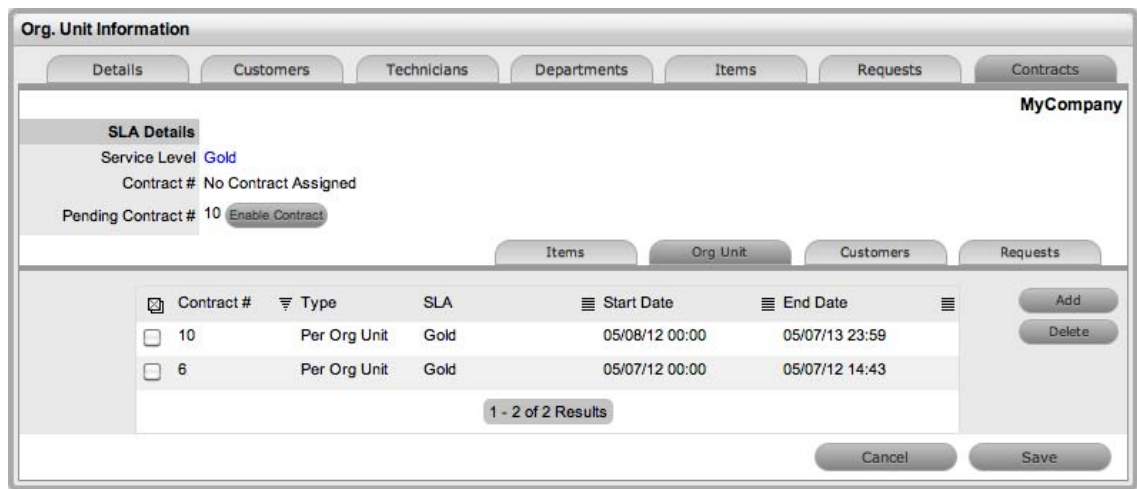
*Support Hours* if selected, the number of support hours purchased by the Customers should be entered.

*Support Hours by Month* if selected, set the number of hours purchased per month and define which day of the month contract is to rollover to start the new month. The Total Support Hours will automatically be calculated based on the Start and End Dates set for the Contract.

(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned. See [Pending Contracts](#).)

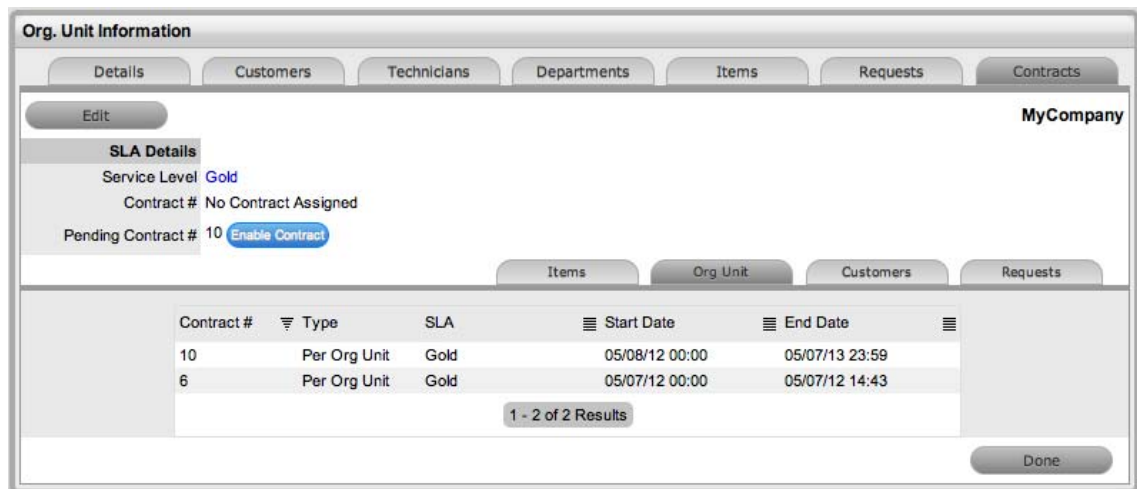
- Click Save
- Click Next to continue

The system reverts to the Contracts summary screen, if the contract is forward dated and another contract is not already active, the Enable Contract option button will be available. Select this button if the contract is to commence prior to the set Start Date. Alternatively, other contracts can be queued for the Org Unit by selecting the Add button.



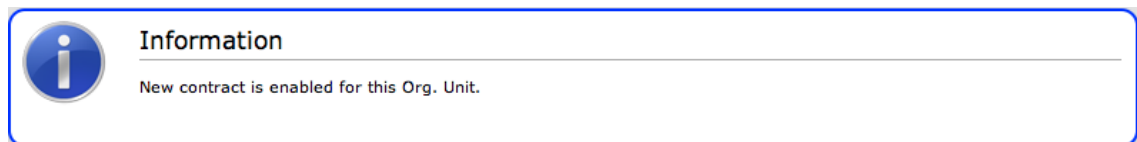
10. Click Save

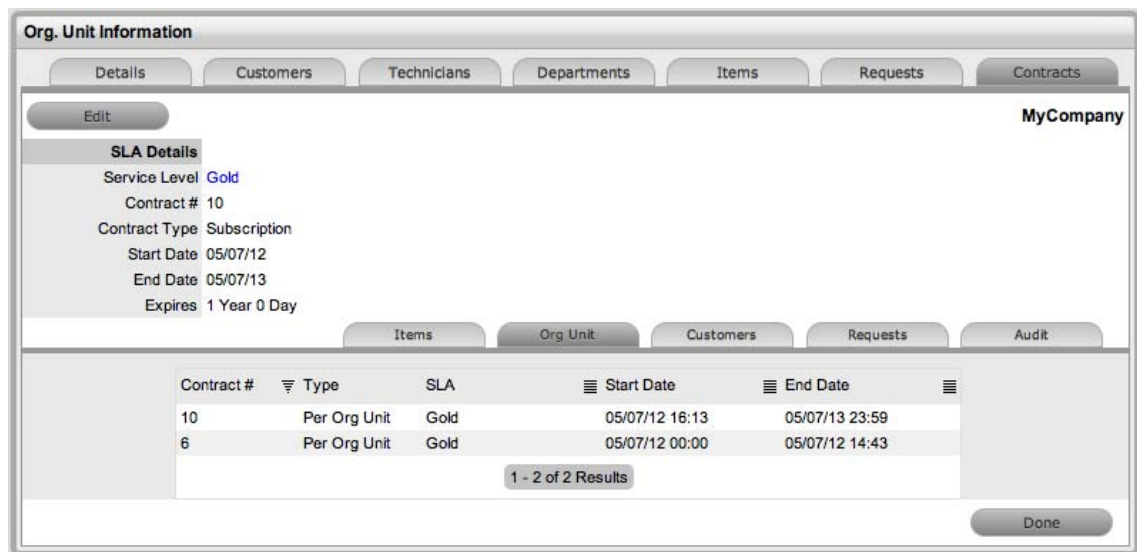
To process the contract before the set Start Date select the Enable button.




11. Click Done.

A success message is displayed.





12. **NOTE:** If Invoices are enabled, a new invoice is automatically saved within the Finance>Invoices screen for the newly created Contract. If payment is required, a Pending Invoice Number is displayed and once processed, the Contract will be listed in the Org.Unit Information>Contracts>Org.Unit tab.

To delete a current Contract, as a Supervisor User, select  next to the Contract Number. Alternatively, to delete a current or queued Contract, within the Contract>Org Unit tab check the field next to the relevant Contract # and select the Delete button.

The Items and Customers tab within the Org Unit>Contracts screen is used to list all the Items and Customers Contracts that are associated with the selected Org Unit.

## 1.7 Primary Contact

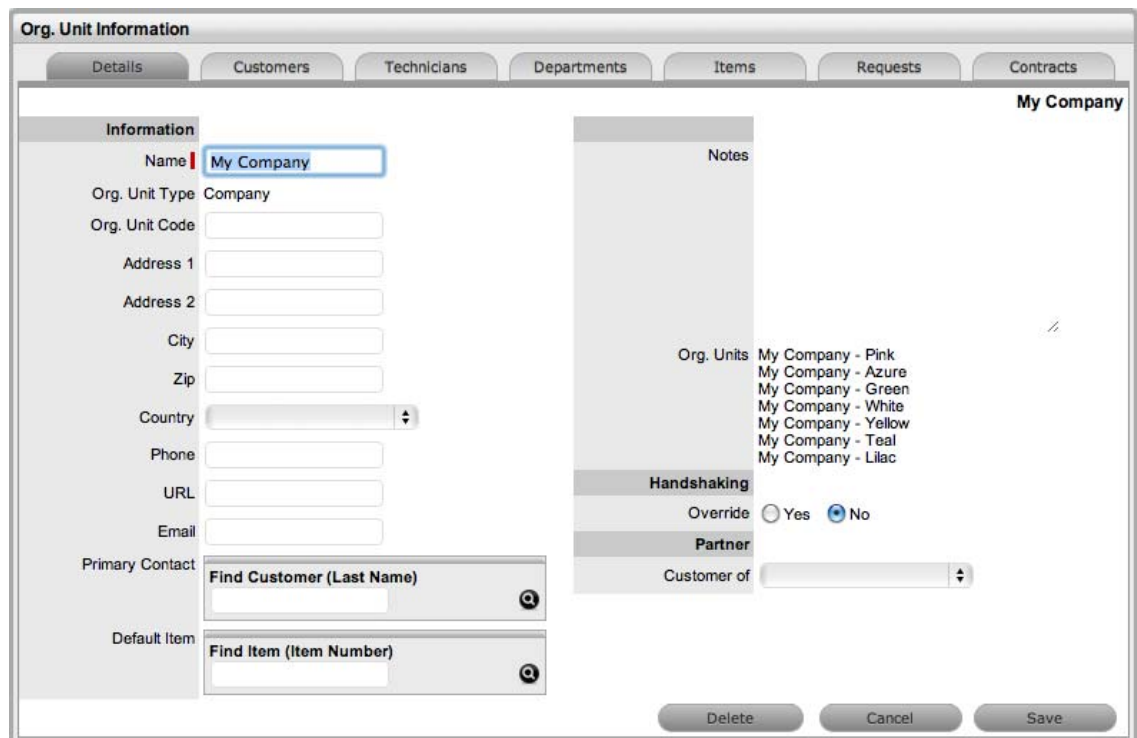
When multiple Customers are assigned to an Organizational Unit, a Primary Contact person can be assigned to the Org Unit. This is the preferred person that will be contacted regarding issues related to the Org Unit.

**NOTE:** When Billing is enabled, a Primary Contact must be assigned to the Org Unit if the Org Unit is to be allocated to an Item. If a Primary Contact has not been assigned to an Org Unit, the Org Unit will not be displayed as an option in Org Unit search results of the Item Information screen.

To assign a Primary Contact:

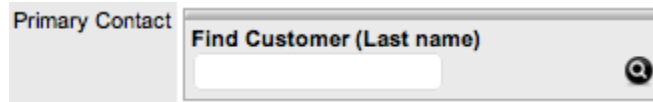
1. Select User>Organizational Units
2. Select an Org Unit Name

The Details tab is displayed. If Customers have been assigned to the Org Unit a Primary Contact field will be visible.



3. Within the Details tab, click Edit

The Find Customer box is displayed. (Note that this search is only visible when Customers have been assigned to the Org Unit)



4. Search for the Customer

To view all available customers click Search without entering a customer last name in the search field

5. Click the Customer name to assign them as the Primary Contact
6. Click Save.

## 1.8 Customers

The Customers tab is used to create, modify and delete Customer Accounts.

A Customer is a User assigned the [Customer Role](#). They can be internal or external to the organization and can raise Incidents through the Customer Portal or via email. Service Desk staff can also generate requests on behalf of the Customer.

Service Desk Customers can be created within this tab. The Administrator can also import Customers from a .CSV file, or synchronize the system with a directory server.

---

**NOTE:** If Customers are imported using a directory server, the option to create Customers from the Users tab is disabled.

---

## 1.8.1 Creating a Customer Account

Customer Information includes the following tabs:

- ◆ Information
- ◆ Aliases
- ◆ Items
- ◆ Requests
- ◆ Contracts.

## 1.8.2 Information Tab

This tab is used to enter contact information about a Customer, creating a new Customer account.

---

**NOTE:** If Custom Fields are to be created for Customer Information, it is recommended the Administrator complete the customization prior to creating Users. (See Administrator: Custom Fields.)

---

To create a Customer account using Internal Authentication:

1. Select User>Customers
2. Select New
3. The Customer Information screen appears with the following fields:
4. \_\_\_\_\_

---

### Customer Information Fields

---

#### Access

|                            |   |
|----------------------------|---|
| Title                      | If enabled, select the appropriate title from the drop-down options. (This field is displayed if the Enable Titles option is set to Yes in the Admin>Setup>Setup>Privileges>Customer tab.)  |
| First Name*                | Customer's First Name.  |
| Last Name*                 | Customer's Last Name.   |
| User Name*                 | The login User name credentials for the User. If this is imported via LDAP or Active Directory, it can not be edited. Otherwise, enter a Username. Note that the value must be unique.  |
| Password/ Confirm Password | The Default Password is set to the Customer's email address or a random string can be enabled by the Administrator in Setup>Privileges>System. See <a href="#">Authentication</a> .<br><br>Customers can reset their password from the Customer Portal, or a Service Desk User can reset it in the customer account details using the Reset Password button through the Customer>Information tab. |
| Web Access                 | Web Access allows Customers to view their account information and Incidents via the Customer Portal.  |

---

---

**Customer Information Fields**

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**Contact****Primary Email\***

The Customer's Email address. System messages are sent to this address.

**Send To**

This field becomes when alternate email addresses are entered on the Aliases tab.

Select the most appropriate email address to be set as the default address applied to Customer correspondence. When the Send To field is set to an alias address, the Primary Email address is not included in the cc list, unless specified in the request Information tab cc list.

**Org. Unit**

The Organizational Unit, be it a Company or Department with which the Customer is associated.

(Organizational Units are created by the Supervisor, in Users >Organizational Units.)

**Line Manager**

If relevant, assign a system user with the Customer Role who can approve/reject requests made by this Customer, as part of the Change Management or Service Request approval process. (This information can not be edited if the line manager details are set by the LDAP synchron.)

**Room**

This field is visible if the Display Rooms option is set to Yes in the Setup>Privileges>Customer screen and there are Room details configured in Organizational Units.

**Address 1**

First line of Customer's address.

**Address 2**

Second line of Customer's address.

**City**

Customer's city details

**State**

Customer's State details. Options will be displayed for the State, once the Country is selected, if Regions are configured for the Country in the system.

**Zip/Postcode**

Customer's area code.

**Country**

Customer's country. The country selected will determine the time zone and state options for the Customer.

**Email Locale**

Set the default language for email correspondence.

**Phone**

Enter Phone details.

**Fax**

Enter the Customer's fax number, if relevant.

**Pager**

Enter the Customer's pager details, if relevant.

---

---

## Customer Information Fields

---

|              |  |
|--------------|--|
| Mobile       | <p>A mobile number can be entered as a contact number or for use with SMS (Short Mail Service message). An SMS can be sent to notify the assigned Technician when a request is created.</p> <p>SMS Messaging options:</p> <ol style="list-style-type: none"><li>1. From the drop-down list, select the SMS Service Provider.</li><li>2. Override SMS Address. If your service provider does not appear in the list, click this checkbox and enter an alternate Service Provider.</li></ol> |
| SMS Override | <p>Enter SMS Gateway override details for the Customer, if a number other than the one entered in the Mobile field is to be used to send/receive updates via SMS. Enter the complete SMS details in email address format, i.e., 000777891@smsgateway.provider.com.</p>   |
| Partner      |  |
| Customer of  | <p>Nominate the Partner Organization associate with the Customer. This is an external service provider who manages the Customer's request.</p> <p>(The option is enabled by the Administrator in Setup Privileges&gt; Use &gt;Edit Customer Partner. The Partner Organizations are defined by the Supervisor in the User&gt;Partner Organizations tab.)</p>  |
| Locale       |  |
| Time zone    | <p>The Customer automatically adopts the default Timezone set for the system. However, the Timezone can be manually adjusted here for the specific Customer.</p>   |
| Last Login   | <p>Auto-populated with the date the Customer last logged into the system.</p>  |
| Host         | <p>The IP address of the last login for the Customer</p>   |
| GPS          | <p>The GPS coordinates of the last known address for the Customer. (This field is displayed when the Record GPS option is enabled in Admin&gt;Setup&gt;Setup&gt;Privileges&gt;Customer tab.)</p>   |
| Roles        |  |
| Current*     | <p>Multiple Roles can be assigned to a User. Select other Roles the Customer will use, by ticking the check boxes.</p> <p>Note: If the Technician Role is selected, a Supervisor must be allocated.</p>  |

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## Customer Information Fields

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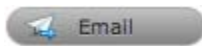
|                |   |
|----------------|---|
| Default Portal | The Default Portal is the user interface a Customer, who is assigned multiple Roles, accesses by default when they log into the system.<br><br><b>NOTE:</b> If the Users Default Portal is set to Customer, the User details will not be accessible in the Users list, but included in the list within the User>Customer tab. |
| Details        |   |
| Notes          | Click on the field to enter any Customer relevant information.  |

---

\* Denotes mandatory fields

1. Click Done.

## Emailing Customers Credentials



To email a newly created Customer details regarding their system log in details, click the Email button within the Customer Information screen. If Random Passwords is enabled, selecting Email will reset the Password and forward the details to the Customer. If Password Questions is enabled in Setup>Privileges>System, selecting Email will send a link to the Customer directing them to a page that includes the security questions set for their account and reset the password based on the answers provided. Customers must complete this process within an hour of the email being sent.

## vCard Button



Select this option to download and open the Customer's information in an electronic business card format, to email or save outside the system.

## 1.8.3 Aliases Tab

The Aliases tab is used to enter additional email addresses. Email addresses in the Aliases tab allow the Customer to send emails to the System or Team support addresses from more than one address. The system creates requests from these emails. Notifications for requests created using an address in the Aliases tab, are sent to the main email address and cc'd to the alias address that was used to create the request.

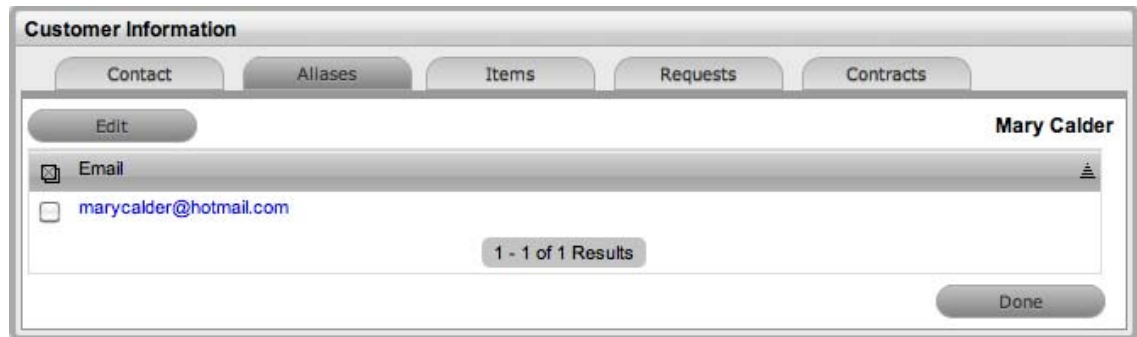
When one or more alias email addresses have been created for a Customer, a Send To field is displayed on the Customer Information screen, which allows the most appropriate email address to be set as the default address applied to Customer correspondence. When the Send To field is set to an alias address the Primary Email address is not included in the cc list, unless specified in the request Information tab cc list.



To add an alias email address:

1. Select User>Customers
2. Click on the Customer name  
The Customer Information screen appears.
3. In the Aliases tab click Edit
4. Click Add
5. Enter an alias email address
6. Click Save.

When an alias email address has been created for a Customer, a Send To field is displayed on the Customer Information screen, which allows the alias email address to be set as the default address applied to Customer correspondence.



To remove an alias email address, in Edit mode, tick the checkbox next to the relevant email address and then click Remove.

## 1.8.4 Items Tab

The Items tab lists the Items owned by the Customer. To access Shared Items, tick the Include Shared option. To view or edit the Item details, select the Item Number hyperlink. Select the Excel button to output the Item List to Excel format.



To add an Item:

1. Select User>Customers

2. Click on the Customer name  
The Customer Information screen appears.
3. In the Information tab, click Edit
4. In the Item tab, click Add  
The Find Item editor is displayed.
5. Search for the relevant Item  
For details regarding an advanced Item search see: [Advanced Search](#).
6. Select the Item # hyperlink  
The selected Item will be associated with the Customer.
7. Click Save
8. Select Done.

## 1.8.5 Requests Tab

The Requests tab is visible after the Customer has been created. It lists all requests related to the Customer and allows the User to create new requests for the Customer. To view details of a request, select the Task # or Problem Report hyperlink. To create a request for the Customer, select the New button.

**Customer Information**

Contact Allases Items **Requests** Contracts

Excel New Filter: All Tasks [sys] Display: 10

| Task #                 | Process  | Date           | Status                      | Technician        | Problem Report   |
|------------------------|----------|----------------|-----------------------------|-------------------|--|
| <a href="#">100055</a> | Problem  | 05/23/11 00:26 | Pending                     | Simone Supervisor | <a href="#">The laptop is taking way too long to start, is this a configuration...</a> |
| <a href="#">100054</a> | Incident | 05/23/11 00:26 | On Hold - Process Escalated | Amber Wallan      | <a href="#">The laptop is taking way too long to start, is this a configuration...</a> |

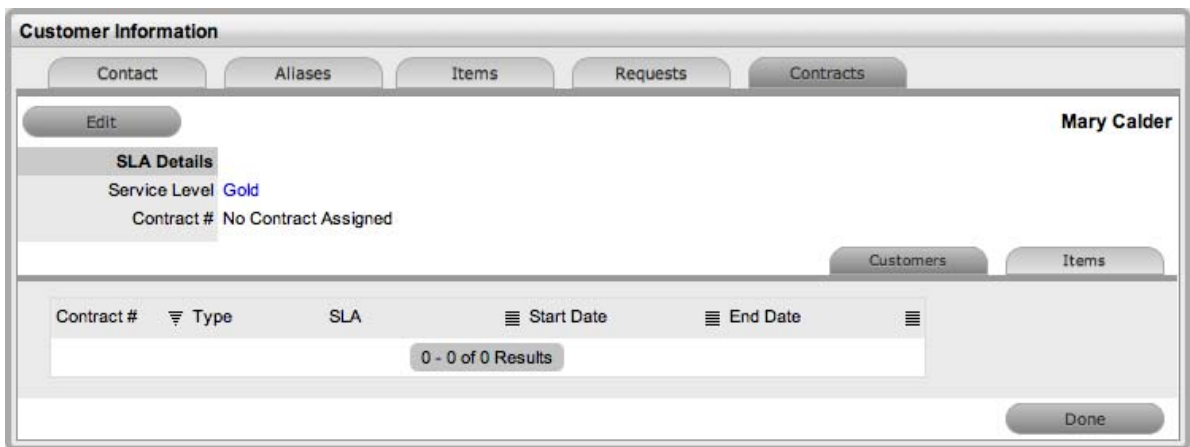
1 - 2 of 2 Results

Done

## 1.8.6 Contracts Tab

The Contracts tab displays a Customer's current contract status. A Customer can be assigned an SLA or, when Billing is enabled, a Contract. A Customer can only have one active Contract, but contracts can be queued within the Contract >Customer tab, as required.

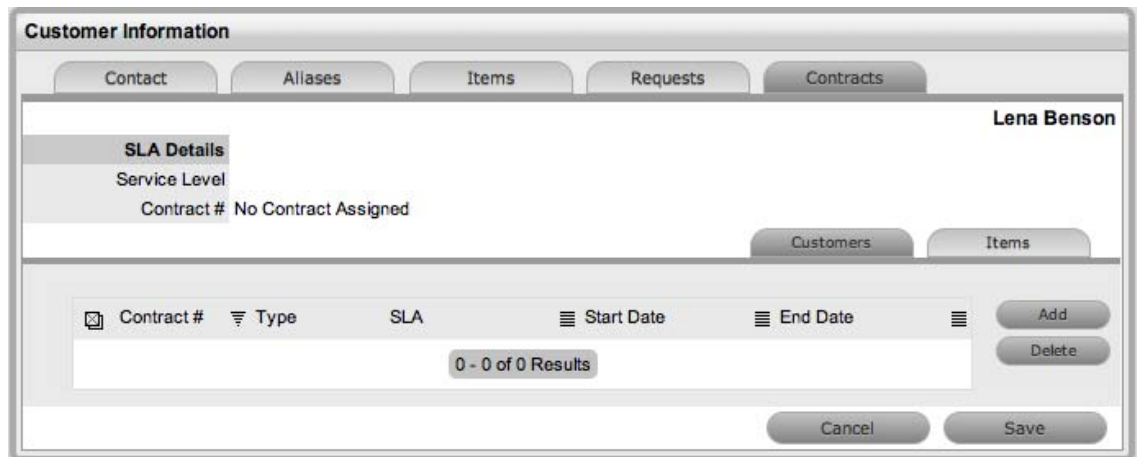
When Contracts are in use throughout the application, the timeframe set for Service Levels and Contract history are displayed within the Contracts tab. It is also possible to assign a Service Level and/or Contract within the Contracts tab.



To create a new Contract for a Customer:

1. Select User>Customers
2. Select the Customer Name
3. Move to the Contracts tab
4. Click Edit

The system will display the Add button in the Customers tab



5. Click Add

The SLA options are displayed.

6. Select a Service Level from the list

When selected, the screen expands to display the Time, Start and End date fields.

**Customer Information**

Contact Allases Items Requests Contracts

**Contract**

Service Level Gold

| Priority | Response Time | Restoration Time | Resolution Time | 24 x 7 support | Alert  |
|----------|---------------|------------------|-----------------|----------------|--------|
| Urgent   | 6 Hours       | 12 Hours         | 24 Hours        | No             | Action |
| High     | 12 Hours      | 24 Hours         | 48 Hours        | No             | Action |
| Medium   | 18 Hours      | 36 Hours         | 72 Hours        | No             | Action |
| Low      | 24 Hours      | 48 Hours         | 96 Hours        | No             | Action |

Contract Type Per Customer

Time Time Limited Subscription

Support Hours

Start Date 05/25/11 23:53

End Date 05/24/12 23:59

Cancel Save

7. Define the Contract Time period

For the Per Customer Contract Type the Time Period for the Contract can be defined:

If *Subscription* is selected, the Start and End Dates are automatically completed by the system, but can be edited if required.

If *Time Limited Subscription* is selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually, entering the length of time for the subscription period.

If *Support Hours* is selected, the number of support hours purchased by the Customers should be entered

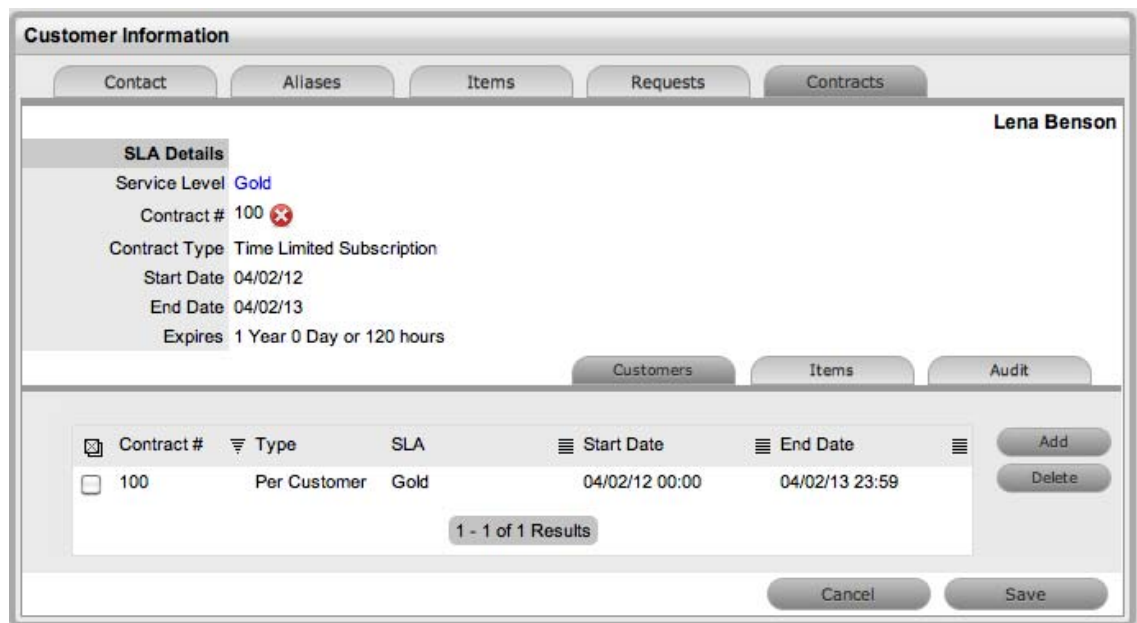
If *Support Hours By Month* is selected, define the number of Support Hours covered per month and on which day of the month the Contract is designated as the Rollover Day. The Start Date and End Date fields are automatically completed as an annual contract subscription but can be edited, as required.

If the Start Date is set as a future date, the Pending Contract status is assigned. See [Pending Contracts](#).


8. Click Save

9. Click Next to continue

The system reverts to the Contracts summary screen.



10. Click Save. Click Done.

To delete a current Contract, as a Supervisor User, select  next to the Contract Number. Alternatively, to delete a current or queued Contract, within the Contract>Customers tab check the field next to the relevant Contract # and select the Delete button.

The Items tab within the Customer>Contracts screen is used to list all the Items with a Contract that are owned by a Customer.

The list of requests with the time recorded against the Contract is displayed within the Audit tab. The Summary view displays the list of requests with total number of Notes and Time allocated to the Contract, while the Detail view includes a breakdown of all Notes and the associated time related to each request.

## Searching for Customers

To search for Customers within the Users>Customers tab:

1. Go to Users>Customer
2. Select



3. Enter any known Customer details to find a specific Customer or to generate a Customer List based on date of creation, enter a Before or After creation date for the Customer.

**Customer Search**

First Name

Last Name

Email

Phone

Org. Unit

Country

Created Before

Created After

Role

Cancel Clear Search

4. Click Search.

The results will be displayed in a table with the Customer Name and contact information.

5. Click on the Customer Name to open the Customer Information module or select the Email Address to send an email.

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**NOTE:** To search for a Customer who has been deleted in the system, conduct the search within the Administrator Portal.

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## 1.9 Service Level Management

The goal of Service Level Management is to maintain and improve the alignment between business activities and IT service quality. This is achieved through the cycle of:

1. *Agree* on service level expectations and record them in Service Level Agreements (SLAs)
2. *Monitor* the service provided
3. *Report* actual service delivery results
4. *Review* IT service delivery results in relation to the SLA, and adjust accordingly.

A Service Level Agreement (SLA) is a formal, negotiated contract that outlines service level expectations and clarifies responsibilities between the Service Desk and its Customers. When unacceptable levels of service are noted throughout the service cycle, action can be taken to re-align expectations with actual service delivery results.

Within the system, SLAs are specific and time-based in order to help monitor and report on performance. They can be applied to any of the following elements within the application:

- ♦ Customers
- ♦ Organizational Units
- ♦ Items.

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**NOTE:** Only Users assigned with the Service Level Management Role can create or modify SLAs.

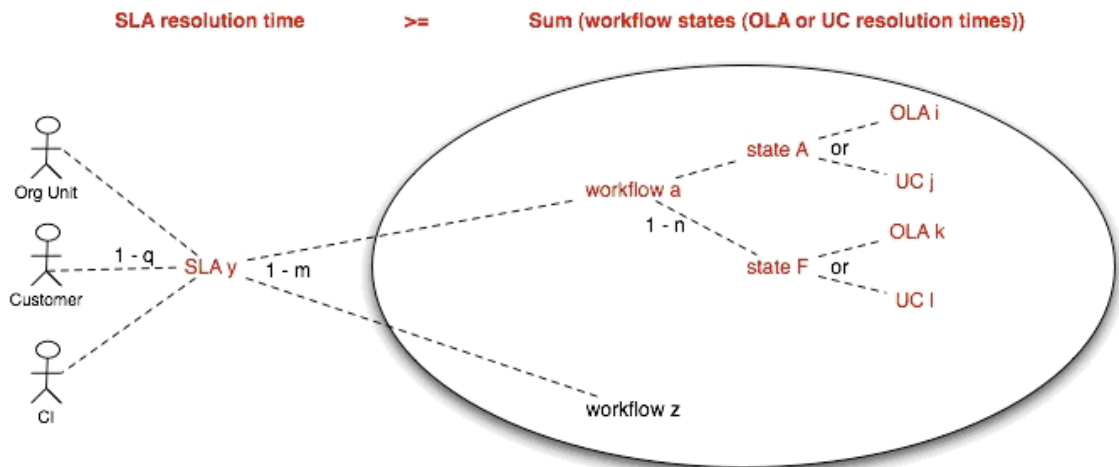
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SLAs are incorporated in the support process when a new Workflow is created. An SLA is assigned to a Workflow and specifies the expected resolution time for a request. To successfully meet SLA expectations, the system allows the Service Desk to associate each Workflow State of a request with an Operational Level Agreement (OLA) or Underpinning Contract (UC).

An OLA is an internally negotiated document that identifies the service level expectations between the Service Desk and the Technical Support Teams. An Underpinning Contract enables the Service Desk to monitor and maintain control of requests that are forwarded to external service and support providers.

To ensure an SLA resolution time is met, the sum of the resolution times for each of the OLAs or Underpinning Contracts assigned to a Workflow Lifecycle must be less than or equal to the SLA resolution time.

LiveTime Service Level Management



ITIL Processes - Incident, Problem or Change Management

## 1.9.1 SLAs in Action

When a request is logged with the Service Desk, the request adopts the SLA that has been assigned to either the Item, Customer or Organizational Unit. If an SLA has not been allocated to any of these elements, the SLA assigned as the system default within the Admin>Setup>Privileges>Requests tab will be automatically applied to the request.

The SLA allocated to the request determines the Workflow options made available for the lifecycle of the request. The Workflows listed are assigned the same SLA as the request. Before saving the request, the User can adjust the system assigned Workflow if more than one option exists.

Refer to [SLM Configuration](#) for more detailed information.

## 1.9.2 Service Tab

Use this section to create and modify SLAs to provide request lifecycle management capabilities. This section can also be used to create and customize OLAs and UCs. After the individual components of the SLAs have been configured, Workflows can be created and assigned the service level management functionality.

The system also provides SLA-compliance reporting, allowing Managers to define and track availability and performance objectives that reflect business goals. SLAs are used across all processes, and are assigned when requests are created.

Within the Service Tab Users can:

- ◆ [Create SLAs](#)
- ◆ [Create OLAs](#)
- ◆ [Create Underpinning Contracts](#)
- ◆ [Define Workflows](#)
- ◆ [Define Breach Codes](#)
- ◆ [Maintain Contracts](#) (when enabled).

## 1.10 Service Level Management Configuration

### 1.10.1 Introduction

A Service Level Agreement (SLA) is a business contract that specifies service level expectations around critical infrastructure and business services. Typically, they refer to response, restoration and resolution targets that the Service Desk needs to meet.

### 1.10.2 OLAs & UCs

Operational level agreements (OLAs) are similar to SLAs, except they communicate internal team-based expectations within specific stages of the Workflow process. Similarly, the obligations of external service providers are specified using Underpinning Contracts (UCs). Unlike an OLA where an appropriate Team Technician is assigned responsibility for servicing a request, it is the responsibility of a Service Level Manager to monitor the performance of the external service provider in relation to the business's expectations as defined in UC Workflow States.

### 1.10.3 Workflows and Workflow States

Workflows consist of an Entry State, one or more Transitional States and Exit States. They define the sequence of steps that Service Desk staff can follow when managing customer requests. Within the system, any number of Workflows can be customized for the Incident, Problem, Change, Release and Service Request Management Processes. Each step, or Workflow State, defines the activity, and if relevant the OLA, with Default Team, or UC required to successfully process the request at that step. Only after the nominated Team Technician has successfully concluded the activity does the request get routed to the next appropriate Workflow State. The Workflow is deemed complete once the request enters an Exit Workflow State.



## 1.10.4 Escalation

When a request is created it is assigned an SLA, and based on the assigned SLA, a Workflow and Team. Based on the configuration of the assigned Team, a Technician or System User is allocated the responsibility of the task. Within Teams, escalation layers are configured for manual or automated routing of requests. Manual routing through the escalation layers is triggered by a Technician in the request Information screen. Automatic routing through escalation layers is driven by the request's assigned priority relative to the associated SLA response, restoration and resolution targets. For each target one or more percentage triggers can be created for automated reminders, warnings or escalations. When the request is in a Service Level active stage of the Workflow the system monitors the percentage of time elapsed relative the SLA triggers, and when percentage targets are met the triggers are activated. If the SLA response, restoration or resolution time is breached, the request is automatically escalated.

## 1.10.5 SLAs and Workflow

The Service Level Management module allows service level expectations to be mapped to end-to-end business processes. In so doing, the system performs the following Service Level Management validation:

SLA resolution time  $\geq$  Sum (Workflow States (OLA or UC resolution times))

When validating Workflows, the system disallows adding States to a Workflow that will force the sum of the Workflow State resolution timers for OLAs and UCs to breach the SLAs resolution timers. In such situations, the system will warn the service level manager to either increase the SLA resolution targets or select a more appropriate UC or OLA that will fall within the SLA targets.

## 1.10.6 Creating a Custom Workflow

### User Portal

- 1 Log into Novell Service Desk as a supervisor.
- 2 Click Service > Workflows > New.
- 3 Edit the newly created workflow to include entry, exit, and intermediate steps and save the information.
- 4 Create a new SLA by navigating to Service > SLA > New. Or, you can modify the existing SLA and add the newly created workflow.

## 1.10.7 Configuring SLM in the system

Before requests can be processed using SLM, a Supervisor typically needs to perform the following sequence of configuration steps:

1. Define Technicians. Set Roles & Process permissions ([Users > Users](#))
  2. Define service level managers ([Users > Users](#))  
To become a service level manager a User must be assigned the Service Level Management Process
  3. Establish business [SLAs](#)
- a. Specify service level manager

- b. Availability %
- c. Warning and breach notifications
- d. Set priority targets
- e. Specify blackout periods
  - 1. Setup **OLAs**
- a. Specify service level manager
- b. Set service targets
  - 1. Setup **Underpinning Contracts** (UCs)
- a. Specify service level manager
- b. Specify Vendor
- c. Set service targets
  - 1. Define **Workflows**
- a. Name the process and associate it with one of the ITIL processes
- b. Optionally modify default open and close states { you might need to come back to this once all states have been defined}
- c. Specify SLA for the Workflow from Step 3.
- d. For each Workflow State, specify:
  - i. Is the Workflow State active?
  - ii. Is the State an entry or exit state?
  - iii. The Contract Type: None / OLA / UC
    - 1. Specify an OLA if the OLA Contract Type is set.
    - 2. Select a default Team, that has been assigned the OLA.
    - 3. Specify a UC, if the UC contract type has been selected.
  - iv. Should the SLA timer continue counting time when the request has entered this State?
  - v. Should the State be used to measure SLA restoration or resolution time (for reporting purposes only)
  - vi. Specify relevant next / previous States to define the end-to-end Workflow.
    - 1. To prevent the SLA target from being breached, the contract time will be calculated when an OLA or UC is assigned to a State.
- e. Update 6b, if required.
  - 1. Define the **Teams**
- a. Specify Technicians
- b. Specify OLAs
- c. Specify Workflows

- d. Define escalation layers or work groups
  - 1. Make any modifications to the Workflow State
- a. Specify a default Team to provide support for specific States (review 6diii 1a)

## 1.10.8 Applying SLM to request creation and management

After SLAs, Workflows and Teams have been defined, the Service Desk is able to use the system to efficiently process Incident, Problem, RFC and Service Requests according to organizational standards and procedures.

The following steps outline the process of generating and managing an Incident in the system:

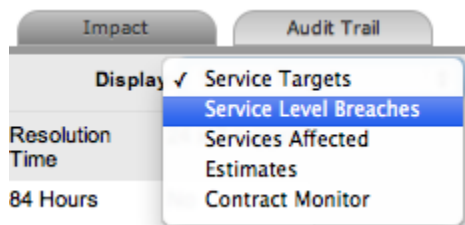
- 1. Within the Operations > Incident tab select the New button:
  - a. Assign a Customer
  - b. Select an Item, which include Services within Service Catalog
  - c. Profile the request
    - i. Select a Classification
    - ii. Enter Description of the request
    - iii. Complete any custom fields
  - d. If the proactive analysis option is enabled, proposed solutions will be available within the Analysis Tab. If a relevant Solution is proposed, apply the Solution to close the request. Otherwise, click 'Next' to move to the Summary tab of the request screen.
    - 1. In the Summary Information screen, confirm:
      - a. SLA
      - b. Workflow
        - i. A list of Workflows options is derived based on the SLA selected
        - ii. If a Workflow has not been assigned to the SLA, then the system default Workflow is assigned to the Incident
      - c. Team
        - i. A list of Team options will be derived based on the Workflow selected
        - ii. If a Team has not been assigned to the Workflow, then the CI's default Team is assigned to manage the Incident
      - d. Technician
      - e. Request Urgency / Impact / Priority
      - f. Notifications
      - g. Workflow State (= Status)
      - h. Add Note(s), and apply private/public visibility and Customer email distribution options
      - i. Upload attachments
      - j. Access Audit trail details

k. Access Impact information (i.e., Service Targets, SLA breaches, Item Relationships, Planned Outages, Contract Monitor)

1. Perform analysis within the Analysis tab
  - a. Allows the system to recommend a proposed Workaround or Solution
  - b. Search Workarounds / Solutions
  - c. Raise new Workaround / Solution
  - d. Raise a new Problem and link it to the request
  - e. Raise a new RFC and link it to the request
  - f. If the request is related to other Incidents, Problems, Change or Service Requests, view all related requests within the Related sidebar in the Summary screen.
    1. Save the request
    2. Group similar or related requests using the Link option and manage the collective from the Group tab or selecting the Group # link in the List View, if this option has been defined for the customized view.

## 1.11 Breach Codes

An SLA breach occurs when a User fails to meet service level targets. When a breach occurs, the User assigned to the request receives an Alert, prompting them to explain the cause of the breach. The User is given the option to select a breach code and provide an explanation for the breach within the Service Level Breach filter view of the Impact tab of the breached request.



Breach codes are defined by a Supervisor User within the Service > Breach Codes tab.

To create a breach code:

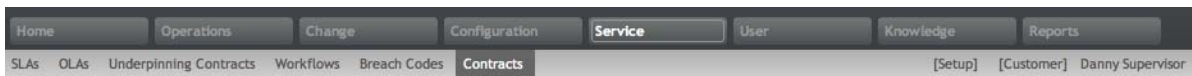
1. Go to Service > Breach Codes
2. Select New

3. Enter a Breach Code label
4. Enter a Description of the breach
5. Click Save.

The System column in the List View includes Yes to indicate a Code that can be edited.

| Name                                      | System | Description  |
|---|--------|--|
| <a href="#">Delayed Customer Response</a> | No     | Requested additional information from the Customer and they did not respond. |
| <a href="#">Technical Problem</a>         | Yes    |  |

## 1.12 Contracts



(Contracts menu option is available when Enable Contracts is set to Yes in Admin>Setup>Billing>Setup.)

Contracts within the system allow service and support organizations to manage their Customer support subscriptions relative to the type of service they provide.

For Customer requests to be addressed, all requests must be associated with a valid contract. A Contract consists of a Service Level Agreement (SLA) and a Service Delivery Period (start and end date). A Service Delivery Period is the duration of the contract, such as a month or a year. In the case of individual request Contracts, the Service Delivery Period terminates when the request is closed.

Contracts can be used as a stand-alone function or with the Invoices facility. Service Desks that charge Customers for the service and support they provide, can enable the Contracts and Invoices functionality. Invoice creation within the system is on a per Contract basis.

## 1.12.1 Contract Types

The Contract Types available within the system include:

- ♦ Per Request - covers the period of time for which the request is open and worked undertaken
- ♦ Per Item, Customer or Org. Unit - covers the Item, Customer or Org. Unit regardless of the number of requests logged against the Item or by the Customer or Org. Unit but can be created on the following basis:
  - ♦ Subscription - a contract that covers a specified period of time
  - ♦ Time Limited Subscription - a contract that covers either a specified period of time or number of support hours, whichever limit is reached first
  - ♦ Support Hours - a contract that defines the number of support hours covered
  - ♦ Support Hours by Month - a contract that covers a total number of support hours purchased for a defined timeframe and allocated on a per month basis.

## 1.12.2 Contracts Option

Users must also be assigned the Service Level Management Process within their User account, in order to view the Service Level tab. The Contracts option within the Service tab is visible when Billing>Contracts is enabled by the Administrator. A list of all Contracts generated in the system is listed here and can be viewed through a selection of Filter options.



The following filter list views are provided:

| Contracts Filter Views             | Description  |
|------------------------------------|--|
| Active Customer Contracts          | Displays a list of all valid contracts for Customers.                          |
| Active Item Contracts              | Lists all valid Item Contracts.  |
| Active Organization Unit Contracts | Displays all valid Organizational Unit Contracts.                              |
| All Agreements                     | Lists all Contracts in the system regardless of status.                        |
| All Customer Contracts             | Lists all Customer Contracts in the system regardless of status.               |
| All Item Contracts                 | Displays all Item Contracts in the system regardless of status.                |
| All Organizational Units           | Lists all Organizational Unit Contracts in the system regardless of status.    |
| All Pending Contracts              | Displays all Contracts with a Pending Status that are waiting to be processed. |
| Request Contracts                  | Lists all Contracts created on a Per Request basis.                            |

### 1.12.3 Contract Creation

The Contracts option within the Service tab only provides the list view of Contracts generated in the system. Contracts are created in any of the following screens:

- Item >Costs >Contracts tab (See: [Costs Tab](#) and [Create a Contract](#).)
- Customer >Contacts tab (See: [Create a Contract](#).)
- Organizational Unit >Contracts tab (See: [Create a Contract](#).)
- Finance >Invoices tab (See: [Contracts and Invoices](#))
- Request >Contract tab for requests with a Pending - No Contract status. (See: [Create a Contract](#).)

### 1.12.4 Contract Fields

The screenshot shows a 'Contract Information' window for 'Contract # 3'. It features an 'Edit' button at the top left. The main content is divided into two sections: 'Details' and 'Ownership'. The 'Details' section includes fields for Contract Type (Per Item), Item (100002 Service Desk), Start Date (08/26/11 00:00), End Date (08/25/12 23:59), Expires (1 Year 0 Day), SLA (Bronze), and Invoice # (100002). A 'Cancel Contract' link is located below the details. The 'Ownership' section shows the Customer as Simone Supervisor. At the bottom right, there are 'Attachment' and 'Audit' buttons. Below these is a table header with columns for 'File Description', 'Size', and 'Date', and a status bar indicating '0 - 0 of 0 Results'. A 'Done' button is at the bottom right of the window.

A Contract in the system includes the following fields in the Contract Information screen:

| Contract Details            | Description  |
|-----------------------------|--|
| Contract Type               | Subscription or a contract that just covers the current request.   |
| Item, Customer or Org. Unit | For Subscription contracts, this is the Item, Customer or Org. Unit covered by the Contract. For Per Incident contracts this is replaced by a request ID number. |
| Start and End Date          | Subscription Contracts default to a one year contract but can be amended.  |

| <b>Contract Details</b> | <b>Description</b>   |
|-------------------------|--|
| Expires                 | The number of days until the Contract expires.   |
| Hours Purchased         | The number of hours purchased for a Time Limited Subscription or Support Hours Contract.                     |
| Time Remaining          | The amount of time remaining for the Time Limited Subscription or Support Hours Contract.                    |
| SLA                     | The SLA applied to the Contract.   |
| Invoice #               | The Invoice number used to create the Contract. (This is displayed when Invoices are enabled in the system.) |
| Ownership               |  |
| Customer                | The Customer covered by the Contract.  |

### 1.12.5 Attachment Tab

The Attachment tab allows the User to upload documentation related to the Contract. This facility provides a centralized repository for storing information and obligation details related to the Contract.

### 1.12.6 Audit Tab

The list of requests with the time recorded against the Contract is displayed within the Audit tab. The Summary view displays the list of requests with total number of Notes and Time allocated to the Contract, while the Detail view includes a breakdown of all Notes and the associated time related to each request.

### 1.12.7 Contract Validation Process

When a request is created and Contracts are enabled, the system validates the contract status for the Customer, Organizational Unit or Item. As part of the contract validation process, the system selects the first element found on this list:

1. Customer (with a valid contract)
2. Org Unit (with a valid contract)
3. Item (with a valid contract)
4. No contract found, then either a Per Request or Per Item Contract can be created by selecting the Pending - No Contract hyperlink and adding a Per Request or Per Item Contract.



## 1.13 Contract Assignment

Contracts can be assigned to an Item, Customer, Organizational Unit or on a per Incident basis. The following content regarding creating a Contract, assumes that within the system Setup, the Billing>Contracts option is enabled.

When a request is created, the system will check if the Customer has a valid contract. If the Customer is not under contract, the system will check if the Org. Unit is covered, and if not, it will assess the Item contract status. If no contract is in place, the request will be assigned a "Pending - No Contract" Status and locked down until a Contract is created. See: [Create a Contract](#).

An Item, Customer and Organizational Unit can only have one active contract in place at a time but multiple contracts can be queued by assigning a Start Date that falls after an existing Contract's end date. Queued Contracts are visible within the Item, Customer or Org Unit's Contract tab identified by the contract number generated at the point of creation, if Invoicing is not enabled in the system. If Invoicing is enabled in the system and an SLA cost is associated with the contract, a contract number is generated when the invoice payment is processed by a Finance User.

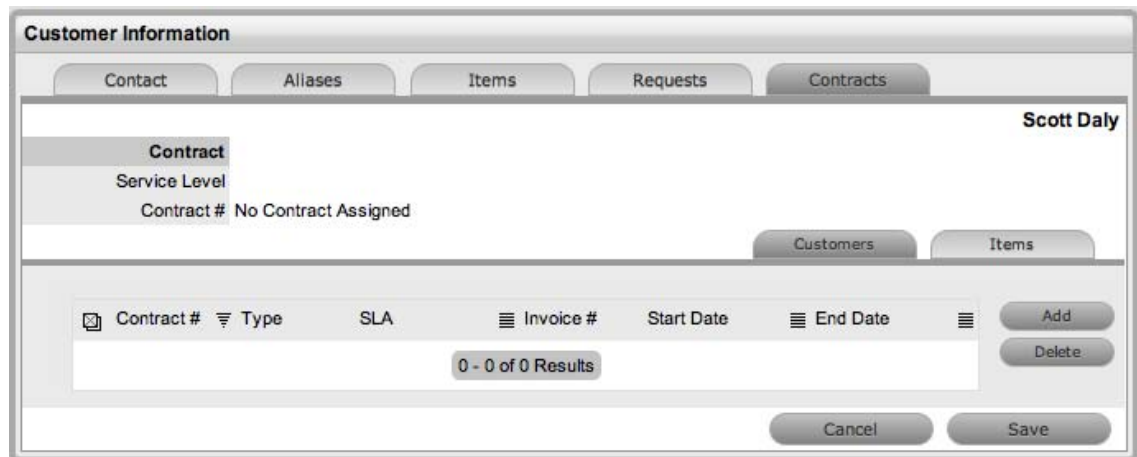
### 1.13.1 Customer Contracts

Customer contract history is stored within the Contracts tab of the Customer Information screen. All contracts, valid and expired, are listed within the Customer and Items tab of the Contracts screen.

To create a new contract for a Customer:

1. Select User>Customers
2. Select the Customer Name
3. Move to the Contracts tab
4. Click Edit

The Add and Delete buttons become available with the Contracts>Customer tab.



5. Click Add  
(If Invoices are enabled in the system, an Invoice number will be automatically generated and assigned to the Contract).
6. Select a Service Level from the list  
When selected, the screen expands to display start and end date fields.

| Priority | Response Time | Restoration Time | Resolution Time | 24 x 7 support | Alert  |
|----------|---------------|------------------|-----------------|----------------|--------|
| Urgent   | 12 Hours      | 24 Hours         | 36 Hours        | No             | Action |
| High     | 24 Hours      | 26 Hours         | 60 Hours        | No             | Action |
| Medium   | 30 Hours      | 48 Hours         | 84 Hours        | No             | Action |
| Low      | 36 Hours      | 60 Hours         | 108 Hours       | No             | Action |

Contract Type: Per Customer  
Time: **Subscription**  
Time Limited Subscription  
Support Hours  
Support Hours By Month

Price \$160.00  
Tax \$0.00  
Taxable   
**Total Cost \$160.00**

7. Define the Contract Time period

For the Per Customer Contract Type the Time Period for the Contract can be defined as one of the following:

*Subscription* if selected, the Start and End Dates are automatically set to year from the date of creation, but can be edited if required.

*Time Limited Subscription* if selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually by entering the length of time for the subscription period, or the system will default to entering a year from the date of creation.

*Support Hours* if selected, the number of support hours purchased by the Customers should be entered.

*Support Hours by Month* if selected, set the number of hours purchased per month and define which day of the month contract is to rollover to start the new month. The Total Support Hours will automatically be calculated based on the Start and End Dates set for the Contract.

(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned. See [Pending Contracts](#).)

8. Add any relevant Invoice Notes
9. Check the Taxable box, if the Contract is to be taxed
10. Click Save

If invoices are enabled and a cost is associated with the SLA, a Warning message is displayed prompting that the invoice needs to be processed by a Finance User before the contract will become available in the system. The invoice can be processed in the Finance >Invoices tab.



### Warning

The invoice has been generated against this customer with status "Pending Unpaid". Technicians will not be able to work with this customer until the invoice has been paid.

11. Click Next to continue

The system reverts to the Contracts summary screen

**Customer Information**

Contact Aliases Items Requests **Contracts**

**Contract** Scott Daly

Service Level  
Contract # No Contract Assigned

Customers Items

| <input type="checkbox"/> | Contract # | Type         | SLA    | Invoice # | Start Date     | End Date       |   |
|--------------------------|------------|--------------|--------|-----------|----------------|----------------|---|
| <input type="checkbox"/> | TBA        | Per Customer | Bronze | 100020    | 05/07/12 00:00 | 05/07/13 23:59 | <input type="button" value="Add"/><br><input type="button" value="Delete"/> |

1 - 1 of 1 Results

12. Click Save. Click Done.

**Customer Information**

Contact Aliases Items Requests **Contracts**

Scott Daly

**Contract**

Service Level **Silver**  
Contract # 11  
Invoice # 100017  
Start Date 05/25/11  
End Date 05/24/12  
Expires 1 Year


Customers Items

| <input type="checkbox"/> | Contract # | Type         | SLA    | Invoice # | Start Date     | End Date       |  |
|--------------------------|------------|--------------|--------|-----------|----------------|----------------|--|
| <input type="checkbox"/> | 11         | Per Customer | Silver | 100017    | 05/25/11 00:00 | 05/24/12 23:59 |  |

1 - 1 of 1 Results

13. **NOTE:** If Invoices are enabled, a new invoice is automatically saved within the Finance>Invoices screen for the newly created Contract. If payment is required, a Pending Invoice Number is displayed and once processed, the Contract details will be included in the Customer Information>Contracts>Customer tab.

The Items tab within the Customer>Contracts screen is used to list all the Items with a Contract that are owned by a Customer.

To delete a current Contract, as a Supervisor User, select  next to the Contract Number. Alternatively, to delete a current or queued Contract, within the Contract>Customers tab check the field next to the relevant Contract # and select the Delete button.

## 1.13.2 Organizational Units Contracts

Organizational Units' Contract history is stored within the Contracts tab of the Org. Unit Information screen. All Contracts, valid and expired, are listed within the Org. Unit, Customer and Items tab of the Contracts tab.

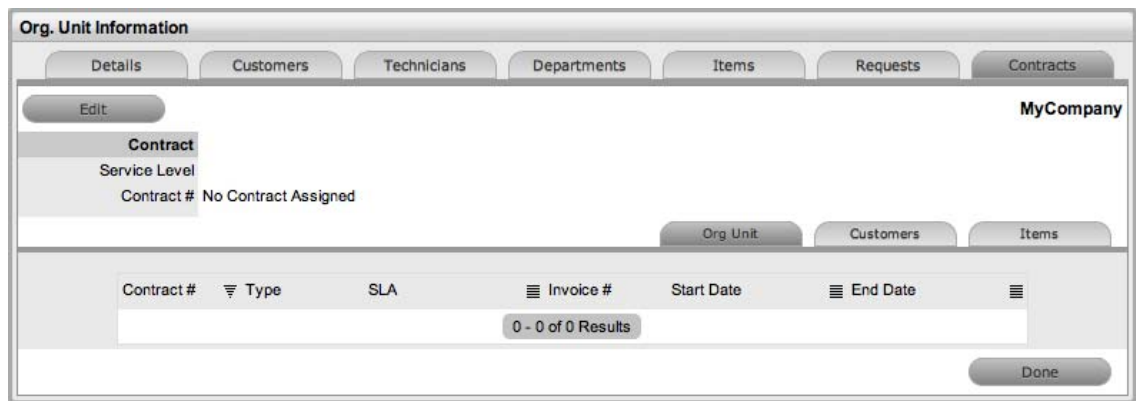
---

**NOTE:** To assign a Contract to an Org Unit, a Primary Contact must be nominated for the Org Unit or the system will prompt the User to assign a Primary Contact during the Contract assignment process. This means, prior to creating the Contract assign at least one Customer to the Org Unit and then designate a Customer as the [Primary Contact](#).

---

To create a new Contract for an Organizational Unit:

1. Select User> Organizational Units
2. Select the Organizational Unit's Name
3. Move to the Contracts tab



4. Click Edit

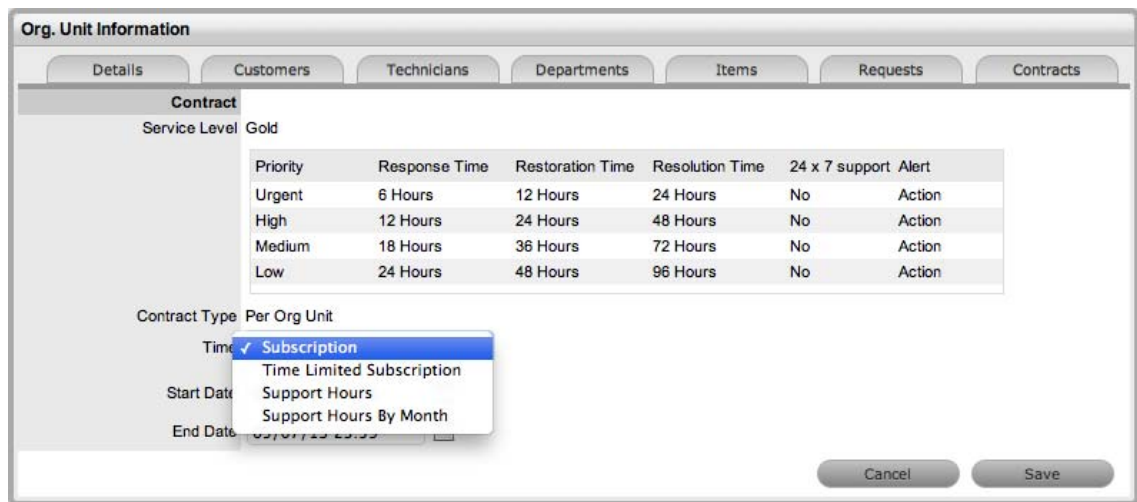
The Add and Delete buttons become available with the Contracts>Org Unit tab.

5. Click Add

If a Primary Contact has not been assigned to the Org Unit a system prompt will notify the User to create a Primary Contact. See: [Primary Contact](#).

6. Select a Service Level from the list

When selected, the screen expands to display start and end date fields.



- For the Per Org Unit Contract Type the Time Period for the Contract can be defined as one of the following:

*Subscription* if selected, the Start and End Dates are automatically set to year from the date of creation, but can be edited if required.

*Time Limited Subscription* if selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually by entering the length of time for the subscription period, or the system will default to entering a year from the date of creation.

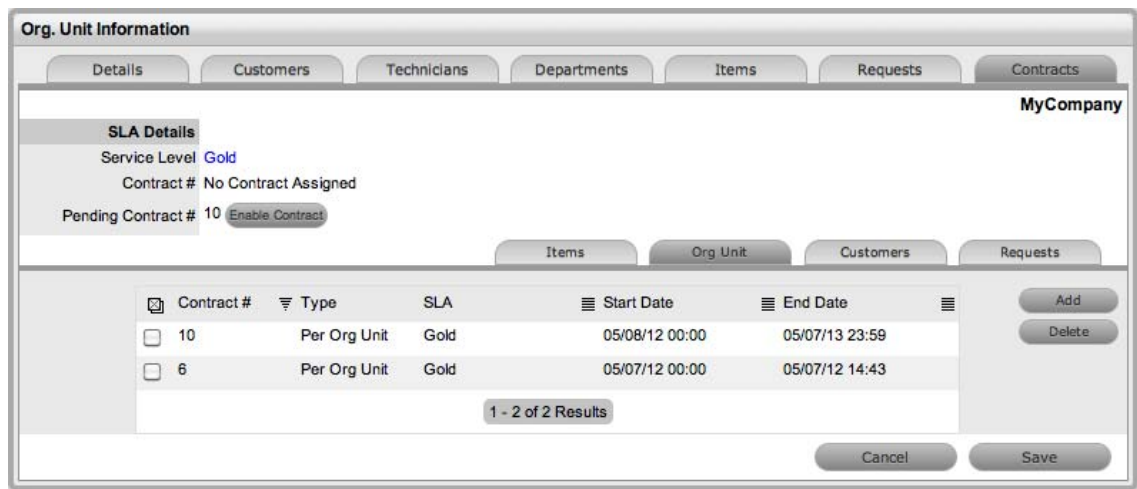
*Support Hours* if selected, the number of support hours purchased by the Customers should be entered.

*Support Hours by Month* if selected, set the number of hours purchased per month and define which day of the month contract is to rollover to start the new month. The Total Support Hours will automatically be calculated based on the Start and End Dates set for the Contract.

(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned. See [Pending Contracts](#).)

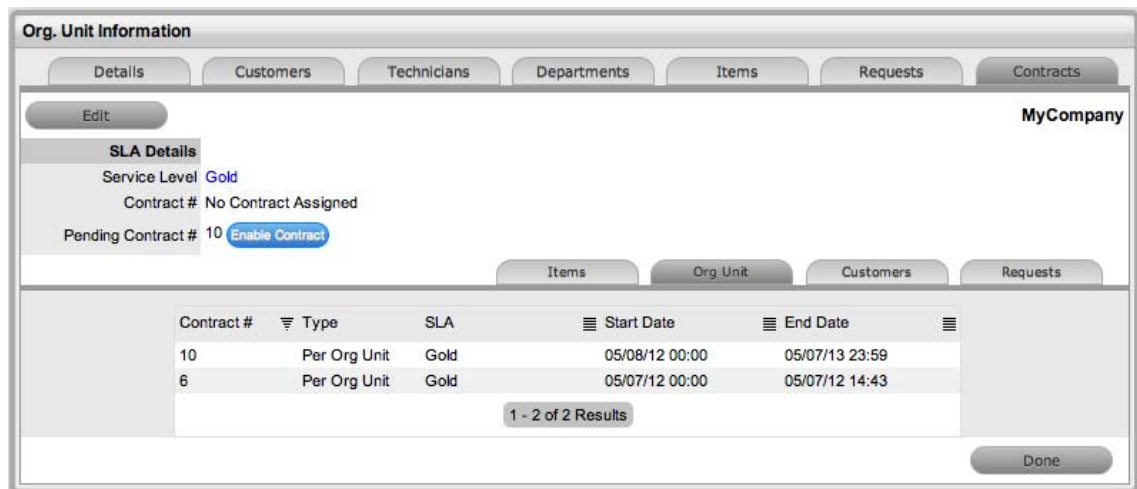
- Click Save
- Click Next to continue

The system reverts to the Contracts summary screen, if the contract is forward dated and another contract is not already active, the Enable Contract option button will be available. Select this button if the contract is to commence prior to the set Start Date. Alternatively, other contracts can be queued for the Org Unit by selecting the Add button.



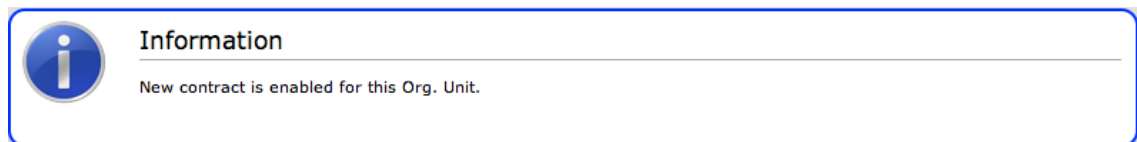
10. Click Save

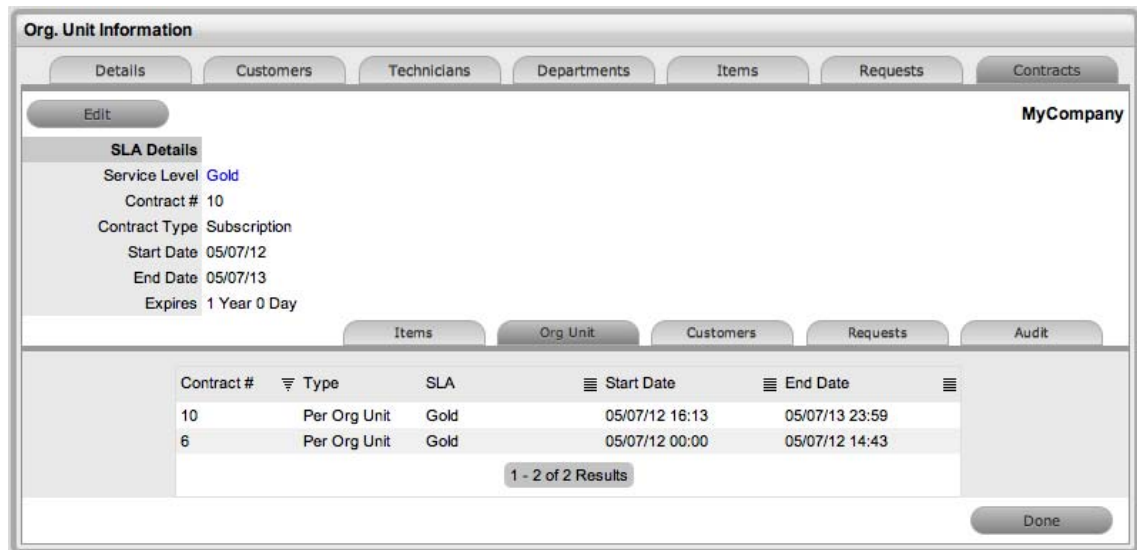
To process the contract before the set Start Date select the Enable button.




11. Click Done.

A success message is displayed.





12. **NOTE:** If Invoices are enabled, a new invoice is automatically saved within the Finance>Invoices screen for the newly created Contract. If payment is required, a Pending Invoice Number is displayed and once processed, the Contract will be listed in the Org.Unit Information>Contracts>Org.Unit tab.

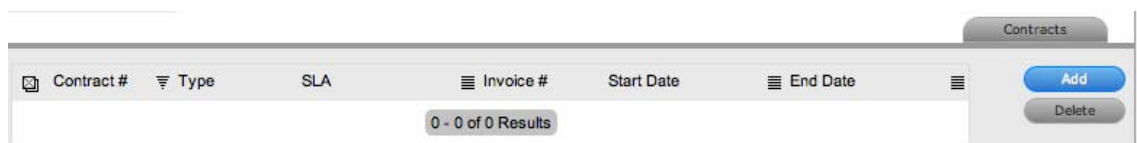
To delete a current Contract, as a Supervisor User, select  next to the Contract Number. Alternatively, to delete a current or queued Contract, within the Contract>Org Unit tab check the field next to the relevant Contract # and select the Delete button.

The Items and Customers tab within the Org Unit>Contracts screen is used to list all the Items and Customers with a Contract that belong to the selected Org Unit.

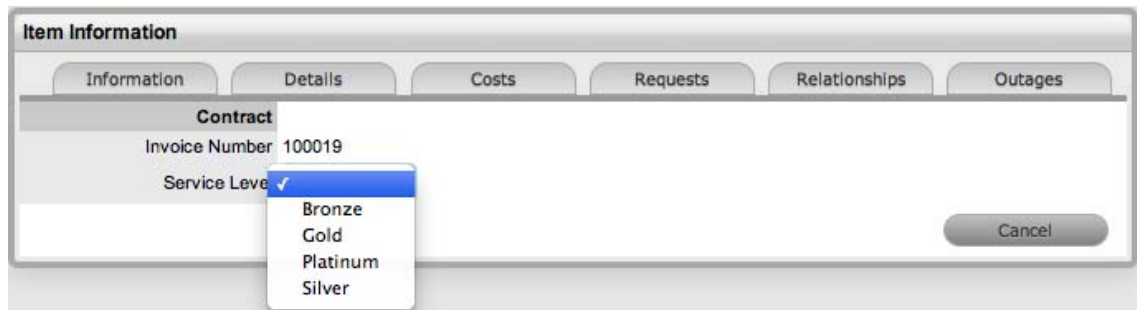
### 1.13.3 Item Contracts

1. Select the Item Number within the Configuration>Item screen
2. Move to the Costs tab
3. Click Edit

The Add and Delete buttons are made available within the Contracts tab

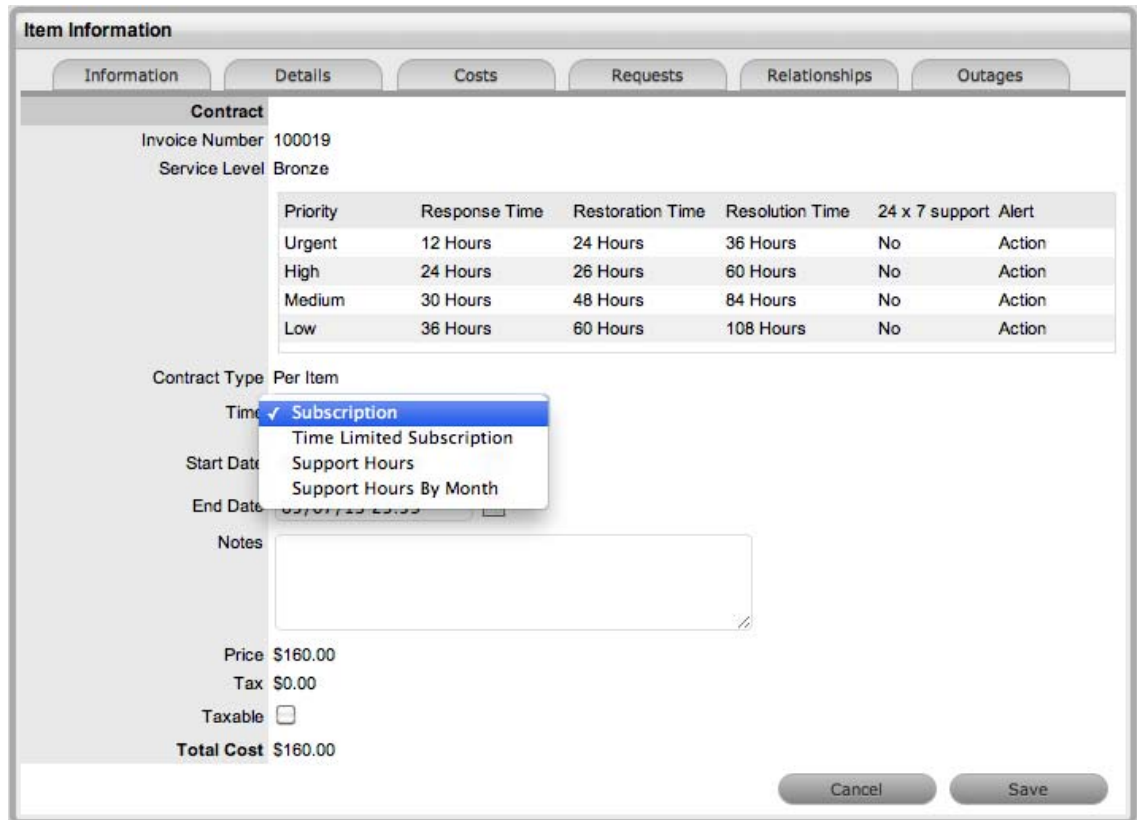


4. Click Add  
(If Invoices are enabled in the system, an Invoice number will be automatically generated and assigned to the Contract).



5. Select an SLA from the drop-down option

The screen will display the SLA details and the Contract Type locked to Per Item.



6. Assign the Time period to be covered by the Contract:

If *Subscription* is selected, the Start and End Dates are automatically completed by the system, but can be edited if required.

If *Time Limited Subscription* is selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually, entering the length of time for the subscription period.

If *Support Hours* is selected, the number of support hours purchased by the Customers should be entered.


If *Support Hours by Month* is selected, set the number of hours purchased per month and define which day of the month contract is to rollover to start the new month. The Total Support Hours will automatically be calculated based on the Start and End Dates set for the Contract.



(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned. See [Pending Contracts](#).)

7. Add any relevant Invoice Notes
8. Check the Taxable box, if the Contract is to be taxed
9. Click Save.

If Invoices are enabled in the system, an Invoice number will be automatically generated for the Contract and made available within Finance>Invoices. Payment will need to be processed by a Finance User before the Contract can be enabled in the system. If invoice payment is required before the contract can be enabled in the system the following Warning message is displayed:

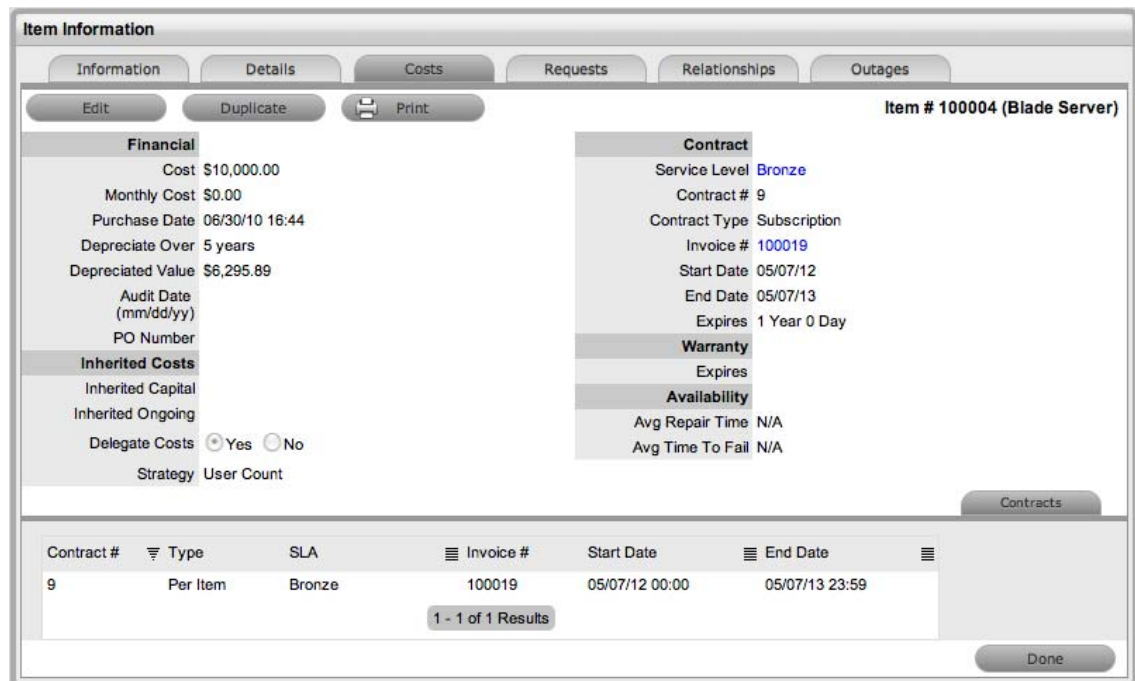


**Warning**

The invoice has been generated against this item with status "Pending Unpaid". Technicians will not be able to work with this item until the invoice has been paid.

10. Click Next

The Contracts information is only populated after the Invoice has been processed. To process the invoice, as a Finance User move to the Finance>Invoices tab. Once the relevant invoice payment has been processed the Contract details will be visible in the Costs >Contracts tab.



The screenshot shows the 'Item Information' screen for 'Item # 100004 (Blade Server)'. The 'Costs' tab is active, displaying financial and contract information.

**Financial**

- Cost \$10,000.00
- Monthly Cost \$0.00
- Purchase Date 06/30/10 16:44
- Depreciate Over 5 years
- Depreciated Value \$6,295.89
- Audit Date (mm/dd/yy)
- PO Number

**Inherited Costs**

- Inherited Capital
- Inherited Ongoing
- Delegate Costs  Yes  No
- Strategy User Count

**Contract**

- Service Level Bronze
- Contract # 9
- Contract Type Subscription
- Invoice # 100019
- Start Date 05/07/12
- End Date 05/07/13
- Expires 1 Year 0 Day

**Warranty**

- Expires

**Availability**


- Avg Repair Time N/A
- Avg Time To Fail N/A

**Contracts**

| Contract # | Type     | SLA    | Invoice # | Start Date     | End Date       |
|------------|----------|--------|-----------|----------------|----------------|
| 9          | Per Item | Bronze | 100019    | 05/07/12 00:00 | 05/07/13 23:59 |

1 - 1 of 1 Results

The Costs tab provides a summary of the current Contract details. The Contracts tab within the Costs screen, lists all contracts that have been assigned to this Item.

To delete a current Contract, as a Supervisor User, select  next to the Contract Number. Alternatively, to delete a current or queued Contract, within the Costs>Contract tab check the field next to the relevant Contract # and select the Delete button.


## 1.13.4 Per Request Contracts

When a request is created without a valid contract, the system automatically assigns the request a status of Pending - No Contract. The User can associate a contract to either the Item or request within the Contract tab of the request Information screen. A Request Contract is only valid for the life of the request. See: [Create a Contract](#).

## 1.13.5 Contracts with Invoices Enabled

When the Invoices option is enabled within the application's setup and a Contract is being created, the system automatically generates a Contract Invoice. For the contract to become active in the system, a Finance User must process the invoice. If no cost is assigned to the Service Level (i.e., Warranty), the invoice is automatically processed and the contract is active in the system.

## 1.13.6 Canceling Contracts

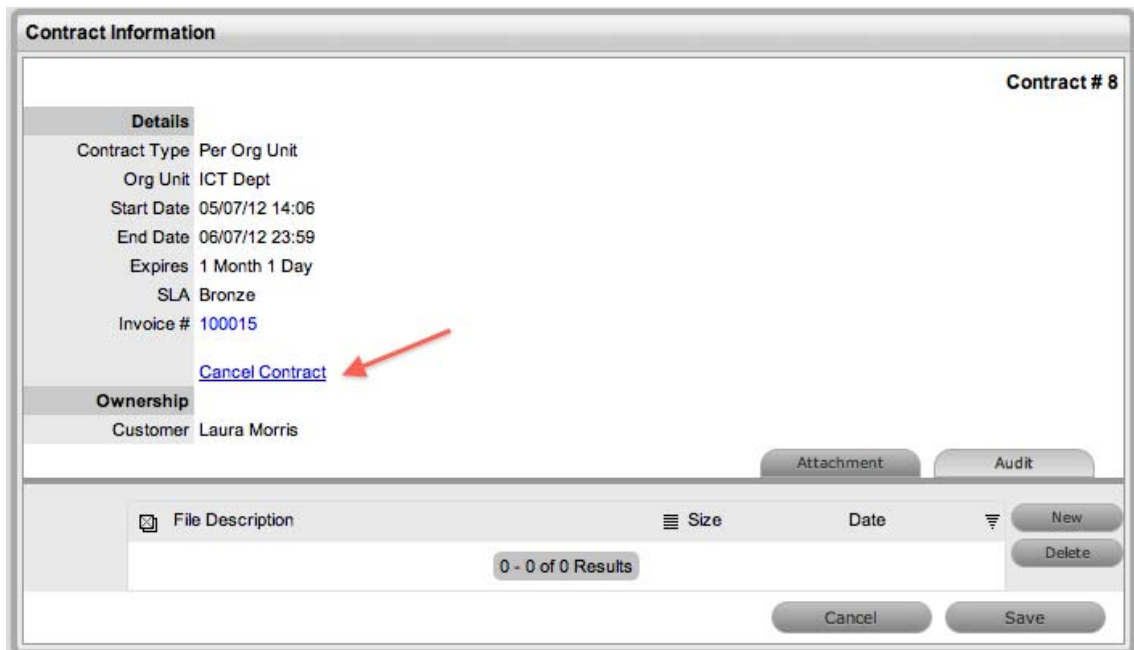
If a Contract is no longer valid, it can be cancelled at any time during the contract period. A Supervisor can cancel the Contract within the Customer, Org, Unit or Item Contracts screen, by selecting  next to the Contract Number. Contracts that are canceled using this option will record the Reason for cancellation as the Supervisor User name who triggered the cancel action.

A User with the *Finance Role* can delete a Contract within the list view of the Service>Contracts tab.

To cancel a Contract, as a User with the Finance Role:

1. Go to Service > Contracts
2. Select a Contract ID to be canceled

The Contract Information screen will appear.



**Contract Information** Contract # 8

**Details**

Contract Type Per Org Unit  
Org Unit ICT Dept  
Start Date 05/07/12 14:06  
End Date 06/07/12 23:59  
Expires 1 Month 1 Day  
SLA Bronze  
Invoice # [100015](#)  
[Cancel Contract](#)

**Ownership**

Customer Laura Morris

Attachment Audit

File Description Size Date New

0 - 0 of 0 Results

Delete

Cancel Save

3. Click the Cancel Contract hyperlink  
A Cancel Reason text box is displayed.

4. Enter an explanation for canceling the Contract



The screenshot shows a form with a label 'Cancel Reason' on the left. To its right is a large, empty rectangular text input field with a blue border. Below the input field are two buttons: 'Cancel' on the left and 'Save' on the right.

5. Click Save

The Cancel Reason is assigned to the Contract and the Contract Expiry date will be marked Expired.

6. Click Done.

---

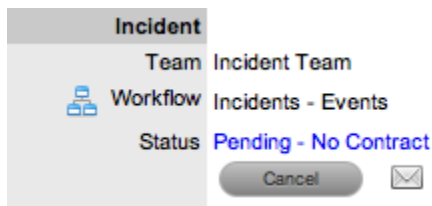
**NOTE:** When a Customer Contract is cancelled and the Customer's associated Org Unit has an active contract in place, the Org Unit Contract details will be displayed within the Contracts>Service Level field of the Customer Information screen.

---


## 1.14 Create & Process a Request with Contracts enabled

When the Contracts or Invoices functionality is enabled and a request is created, the system will verify the service entitlement status of the Customer and if a valid contract is not in place, the new request is assigned a status of Pending - No Contract and locked until a valid contract is associated with the request.

In a Request Group where the Customer and Organizational Unit does not have a Contract, if an Item applied to a request has a Contract and another does not, a relevant status will be applied to each request. The User will be able to edit the request with a valid Contract, but the request without a Contract will be locked down to a Pending - No Contract status, until a valid Contract is applied to the request.



The screenshot shows a card-like interface for an 'Incident'. It has a header 'Incident' in a grey bar. Below the header, there are three rows of information: 'Team Incident Team', 'Workflow Incidents - Events' (with a small icon to the left), and 'Status Pending - No Contract' (with the status text in blue). At the bottom of the card, there is a 'Cancel' button and an envelope icon.

The Customer is automatically sent the NoContractCreateRequestSummary email when the request is saved with the Status. A reminder email can be sent to the assigned Customer by the Technician from within the Summary tab by clicking .

Two types of Contracts are used by the system, these include Per Item or Per Request Contracts. They are defined as follows:

- ◆ Per Request - covers the period of time for which the request is open and work is done
- ◆ Per Item - covers the Item, regardless of the number of requests logged against the Item and can be defined as:

*Subscription* - a contract that covers a specified period of time

*Time Limited Subscription* - a contract that covers either a specified period of time or number of support hours, whichever limit is reached first

*Support Hours* - a contract that defines the number of support hours covered

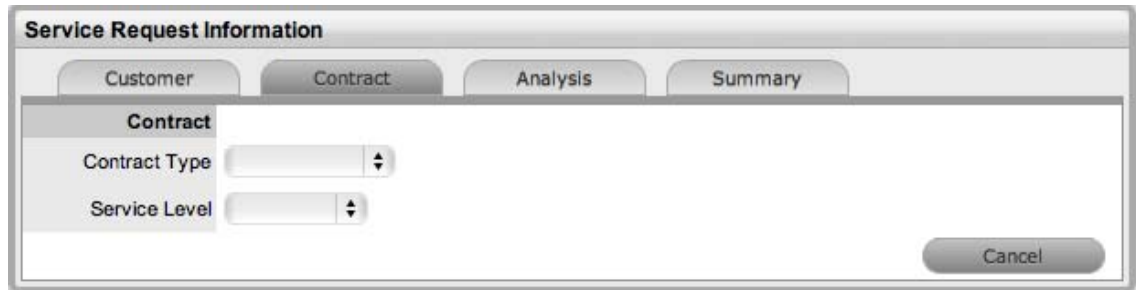
*Support Hours by Month* - a contract that covers a total number of support hours purchased for a defined timeframe and allocated on a per month basis.

## 1.14.1 Request with Per Item Contract

To create a *Per Item* Contract for a request within the Summary tab of the request:

1. Click the Pending - No Contract link

The Contract tab is displayed with Contract Type and Service Level drop-down options.



The screenshot shows a dialog box titled "Service Request Information" with four tabs: "Customer", "Contract", "Analysis", and "Summary". The "Contract" tab is selected. Inside the dialog, there are two drop-down menus: "Contract Type" and "Service Level". A "Cancel" button is located in the bottom right corner.

2. Select the Contract Type of Per Item

For the Per Item Contract Type the Time Period for the Contract can be defined as one of the following:

*Subscription* if selected, the Start and End Dates are automatically set to a year from the date of creation, but can be edited if required

*Time Limited Subscription* if selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually by entering the length of time for the subscription period, or the system will default to entering a year from the date of creation

*Support Hours* if selected, the number of support hours purchased by the Customers should be entered

*Support Hours by Month* if selected, set the number of hours purchased per month and define which day of the month the contract is to rollover to start the new month. The Total Support Hours will automatically be calculated based on the Start and End Dates set for the Contract.

(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned. See [Pending Contracts](#).)

**Service Request Information**

Customer Contract Analysis Summary

**Contract**

Contract Type: Per Item

Service Level: Gold

Time: Subscription

Start Date: 05/13/11 00:03

End Date: 05/12/12 06:59

| Priority | Response Time | Restoration Time | Resolution Time | 24 x 7 support | Alert  |
|----------|---------------|------------------|-----------------|----------------|--------|
| Urgent   | 6 Hours       | 12 Hours         | 24 Hours        | No             | Action |
| High     | 12 Hours      | 24 Hours         | 48 Hours        | No             | Action |
| Medium   | 18 Hours      | 36 Hours         | 72 Hours        | No             | Action |
| Low      | 24 Hours      | 48 Hours         | 96 Hours        | No             | Action |

Cancel Save

3. Click Save  
The maintenance contract is created.
4. Click Next to continue to create the request by defining the Classification and Description.
5. **NOTE:** If Invoices are enabled, a new invoice is automatically saved within the Finance>Invoices screen for the newly created Contract.

## 1.14.2 Request with Per Request Contract

To create a *Per Request* Contract for a request within the Summary tab of the request:

1. Click the Pending - No Contract link  
The Contract tab is displayed with Contract Type and Service Level drop-down options.
2. Select the Per Request Contract Type  
(The SLA Price and Tax option box is displayed, if Invoices are enabled for the system.)
3. Select the SLA  
(If required, check the box to indicate if tax is to be applied to the Invoice, which will be applied to the Invoice that is automatically saved within the Finance>Invoices screen when the newly created Contract is saved.)

**Service Request Information**

Customer    Contract    Analysis    Summary

**Contract**

Contract Type: Per Request

Service Level: Bronze

Group:  Apply to uncontracted

SLA Price: \$20.00

Taxable:


Targets

| Priority | Response Time | Restoration Time | Resolution Time | 24 x 7 support | Alert  |
|----------|---------------|------------------|-----------------|----------------|--------|
| Urgent   | 12 Hours      | 24 Hours         | 36 Hours        | No             | Action |
| High     | 24 Hours      | 26 Hours         | 60 Hours        | No             | Action |
| Medium   | 30 Hours      | 48 Hours         | 84 Hours        | No             | Action |
| Low      | 36 Hours      | 60 Hours         | 108 Hours       | No             | Action |

Cancel    Save

4. Click Save

(If the Service Level selected for the request has a cost associated with it, the request will be assigned with the status Pending - No Contract. Work cannot commence on the request until payment for the invoice is received.)



**Warning**

---

The Service Request has been flagged as "Pending - No Contract". Technicians will not be able to work on this Service Request until the invoice has been paid.

5. If the Service Level has no cost i.e., Warranty, the maintenance contract is created and work can commence on the request immediately

6. Click Done.

The screen defaults to the Summary tab.

### 1.14.3 Grouped Requests and Contracts

Contracts can be applied to all requests within an Incident Group when a *Per Request* contract is created within the Contract tab of a grouped request. The following options are available:

- ♦ Per Group - applies the Contract to the Request Group as a whole and assigns a single charge for the Contract. On the associated Invoice, if relevant, the SLA Price is distributed evenly across each Request line-item

- ◆ Per Request - applies the Contract to the Request Group but assigns the SLA Price as an individual charge to each request within the Group. On the associated Invoice, if relevant, the SLA Price is applied to each request line-item.

**Incident Information**

Customer Contract Analysis Summary

**Contract**

Contract Type: Per Request

Service Level: Bronze

Group:  Apply to uncontracted

Charge base: Per Group

SLA Price: Per Request

Taxable:


Targets

| Priority | Response Time | Restoration Time | Resolution Time | 24 x 7 support | Alert  |
|----------|---------------|------------------|-----------------|----------------|--------|
| Urgent   | 12 Hours      | 24 Hours         | 36 Hours        | No             | Action |
| High     | 24 Hours      | 26 Hours         | 60 Hours        | No             | Action |
| Medium   | 30 Hours      | 48 Hours         | 84 Hours        | No             | Action |
| Low      | 36 Hours      | 60 Hours         | 108 Hours       | No             | Action |

Cancel Save

## 1.14.4 Processing an Invoice

If invoice payment for the SLA contract is required before the User can commence work on the request, the following system message is displayed:



**Warning**

The Service Request has been flagged as "Pending - No Contract". Technicians will not be able to work on this Service Request until the invoice has been paid.

When a request is flagged with this status, the Edit button will not be available within the Summary tab and a User assigned the Finance Role must process invoice payment before the request can be edited.

To process payment for an invoice see: [Invoice Payment and Delivery](#)

## 1.14.5 Invoice Cancellation

To cancel an Invoice for a request:

1. Select the Request # id
2. Select the Request with the Status Pending - No Contract
3. Click the Cancel hyperlink in the Summary tab.

This will cancel the Invoice and change the request Status to Cancelled - Unpaid.

## 1.15 Operational Level Agreements (OLAs)

An OLA is an internally negotiated agreement that identifies the service level expectations between the Service Desk and the Technical Support Teams. OLAs are applied to Workflow States and allow the Service Desk to successfully meet service level expectations. This is achieved by associating an SLA to a Workflow and then assigning, where relevant, OLAs or [Underpinning Contracts](#) to separate stages of that Workflow. It should be noted that SLA targets for Response, Restoration and Resolution time must be greater than or equal to the combined OLA and UPC times for each of these targets, to ensure that service level breaches do not occur.

**Workflow - Incident Workflow**

Workflow Lifecycle **Status**

**Status**

Name | Open - Restored

Active State  Yes  No

Entry Point

Exit Point

Has Notes

Listener Class

**Service**

SLA Active  Yes  No

SLA Restoration  Yes  No

SLA Resolution  Yes  No

Contract Type  None  OLA  Underpinning Contract

**OLA**

**OLAs** Available OLAs Selected OLAs

No OLAs available

Action Team

Default Contract | Action Team

### 1.15.1 Details Tab

#### Creating an OLA

To create a new OLA:

1. Select Service > OLAs
2. Click New



3. Enter a Name for the OLA
4. \_\_\_\_\_

---

### OLA Editor

---

#### Details

Name\*

The name to identify the OLA.

Review Date

Details are completed based on the Admin default settings but can be edited by the User. An Alert is sent based on the default days set in the Review SLA Alert field in Admin>Setup>Privileges>Requests.

Pause on SLA Holiday

\*\*This option is only displayed if the 'Public Holidays' option has been enabled within the Administrator>Setup>Privileges>Technician tab.

Enable this option, if the OLA is to be adjusted on designated Public Holidays, when an associated SLA has the Pause on Holiday option enabled. The Public Holidays are defined within the Administrator>Setup>Public Holidays screen and associated with requests via the assigned Technician and their associated Country.

Customer Timezone

When enabled, OLA times displayed within the Technician request view uses the Customer timezone.

Timezone

This is visible when Customer Timezone is not set and all SLA dates are calculated based on the Timezone set within this field. This is especially applicable for User Work Hours, Blackouts, which also impacts the SLA Reports.

SLM (Service Level Manager)

Name

Use the Find Service Level Manager search option, to enter the contact details of the Manager who will monitor the performance of the OLA.

Email

---

5. Adjust the Review Date, if necessary  
(A reminder Alert will be sent to the SLM, based on the default days set in Admin>Setup>Privileges>Request.)
6. Tick the Customer Timezone option, if relevant  
Apply this option if the User is to view OLA due dates using the Customer Timezone or complete the Timezone option.
7. Search and select a Service Level Manager.  
A Service Level Manager (SLM) is a User that has been assigned with the Service Level Management Process.
8. Move to the Targets tab
9. Complete the following information:

---

**SLA Editor**


---

## Targets

## Targets

*Common:* Select Common if the OLA is to apply across Incidents, Requests, Problems and Change Management.

*Per Process:* If the OLA is specific to a Process, select Per Process and choose a Process displayed in the drop-down list.

## Interval

Define if the time is to be calculated in Hours or Minutes.

## Service Time

## Priority

Urgent, High, Medium and Low

## Milestones

## Initial Response

The maximum time the Customer would wait from the point of request creation before receiving a Note update for a Technician. The Response trigger is stopped when a Note has been added to the request by the assigned Technician and an email is sent to the Customer. If the Response Time is reached, without a Note being added, the request will be escalated.

## Restoration Time

The maximum time the Customer would wait from the time the request was created until a workaround or temporary fix has been implemented. The Restoration trigger stops by assigning the request a Workflow State that has to the OLA Restoration option set to Yes. By default, this Workflow State is Open - Restored.

## Resolution Time

The taken time from the point of request creation until it the request is moved to a Workflow State with the OLA Resolution option set to Yes. Any of the default Workflow Exit States stop the Resolution Timer.

## Notify Override

If the system is to override the default notification method set for a request when the Priority being edited is assigned to a request, check this option.

## Notification Type

Set Email or SMS as the type of notification when the override action is applied to a Priority.

## Alerts

## Reminder

Sends a reminder email to the Technician when the defined percentage of time elapses for a Response, Restoration or Resolution target that has not been met on a request. Can be set up to 200% of the OLA. Note, Alert intervals are not cumulative.

---

---

**SLA Editor**

---

|                |   |
|----------------|---|
| Warning        | Sends a warning email to the Technician when the defined percentage of time elapses for a Response, Restoration or Resolution target that has not been met on a request. Can be set up to 200% of the OLA.  |
| Escalation     | Escalates the request to a higher escalation layer when the defined percentage of time elapses for a Response, Restoration or Resolution target that has not been met on a request. Can be set up to 200% of the OLA. It should be noted that the Service Level Manager is also notified when an OLA is breached. |
| Support        |   |
| 24 x 7         | Do not amend if the OLA is to apply 24 hours a day, 7 days a week.  |
| Normal Support | Select if service hours are to be defined for the OLA. When checked, define the service hours by either selecting a template (Templates are configured by the Administrator in the Setup>Localization>Hours tab) or manually define the days and time by making selections within the drop-down lists.            |

---

11. Add one or multiple Warning Alerts, if required

---

**NOTE:** Trigger intervals are not cumulative

In the default OLA for Warranty, the Urgent default times of 6, 12 and 24, mean 6 hours for the Response stage, 12 hours for Restoration from initial creation, and 24 hours to reach the Resolution from initial creation.

---

1. Define the support hours

Within 24 X 7, if the OLA's urgent Initial Response field is set to six hours, and an urgent request that uses the OLA is created at midnight in the assigned Technician's time zone, those six hours will expire by 6:00 AM. This is the option to use if your support is staffed 24 hours a day.

Normal support ensure request timers do not run when Technicians are not available. For instance, if the support hours are 9:00 AM to 5:00 PM and the SLAs are as such, the urgent requests' timer would not start ticking until 9:00 AM the following business day and would expire at 3:00 PM.

2. Click Save
3. Click Done.

Now associate the OLA with a Team within the Service tab of the Team Information screen.

The OLA will also be available within the OLA options displayed when OLA is selected as a Contract Type option within the Workflow Status editor screen.

## 1.15.2 States Tab

The OLA States tab lists the Workflow stages that are assigned to the OLA.

### 1.15.3 Teams Tab

The Teams tab displays the Team Names and Processes that are assigned to the OLA.

#### Assigning an OLA to a Team

OLAs are assigned to Teams within the Service Tab of the Team Information screen, when Teams are created or edited. For more information about assigning OLAs to Teams, see [Teams](#). To view OLAs associated with Teams, sort the User>Team List View using the OLA column header. The Lead Technician and ITIL Process supported by the Team are also displayed.

#### OLAs and Blackout Periods

If a request is assigned an OLA State and the request's SLA is in a Blackout Period, the OLA will adopt the SLA Blackout Period. This means that the OLA timers will stop until the Blackout Period has elapsed.

## 1.16 Underpinning Contracts

Underpinning Contracts (UCs) are used to manage support services provided to the Service Desk by external service providers. These Contracts ensure the external parties maintain their service obligations to the Service Desk, which ensures the Service Desk meets the SLA expectations of its Customers.

To successfully meet SLA expectations, the system allows the Service Desk to associate each Workflow State of a request with an Operational Level Agreement (OLA) or Underpinning Contract. It should be noted that SLA targets for Response, Restoration and Resolution time must be greater than or equal to the combined OLA and UC times for each of these targets, to ensure that service level breaches do not occur.

**Workflow - Incident Workflow**

Workflow Lifecycle **Status**

**Status**

Name | Outsourced

Active State  Yes  No

Entry Point

Exit Point

Has Notes

Listener Class

**Service**

SLA Active  Yes  No

SLA Restoration  Yes  No

SLA Resolution  Yes  No

Contract Type  None  OLA  Underpinning Contract

**Underpinning Contract**

Underpinning Contracts

Available Underpinning Contracts

No Underpinning Contracts available

Selected Underpinning Contracts

Canton Services

Default Contract | Canton Services

Assign SLM  Yes  No

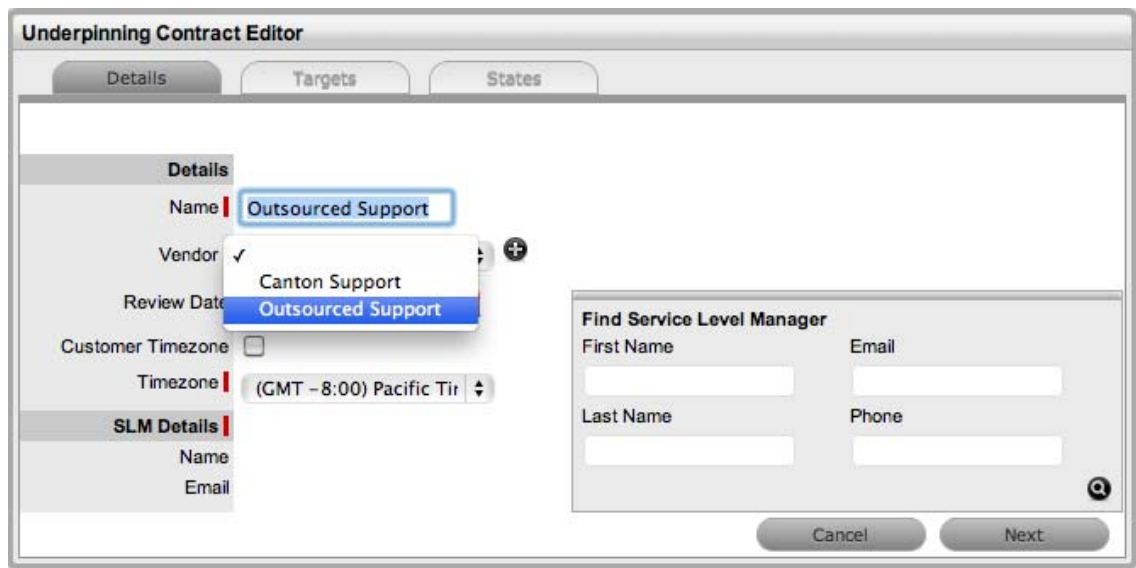
When a request moves into a State that is governed by an Underpinning Contract, for internal contract monitoring, the request can be assigned to a Service Level Manager. This allows the Manager to maintain control of the request and to easily follow up with the external service provider, if required.

## 1.16.1 Details Tab

### Creating an Underpinning Contract:

To create an Underpinning Contract for use within a Workflow State:

1. Select Service>Underpinning Contracts
2. Click New



3. Enter the Contract Name
- 4.

---


#### UPC Editor

---

##### Details

|                                    |   |
|------------------------------------|---|
| Name*                              | The name to identify the UC.  |
| Vendor                             | The name of the service provider supporting the contract. Select from the list or create a new Vendor.  |
| Review Date                        | Details are completed based on the Admin default settings but can be edited by the User. An Alert is sent based on the default days set in the Review SLA Alert field in Admin>Setup>Privileges>Requests.                         |
| Customer Timezone                  | When enabled, UPC times displayed within the Technician request view using the Customer timezone.   |
| Timezone                           | This is visible when Customer Timezone is not set and all UPC dates are calculated based on the Timezone set within this field. This is especially applicable for User Work Hours, Blackouts, which also impacts the UPC Reports. |
| <b>SLM (Service Level Manager)</b> |   |
| Name                               | Use the Find Service Level Manager search option, to enter the contact details of the Manager who will monitor the service provider's ability to meet their contractual obligations .   |
| Email                              |   |

---

5. Select a Vendor from the drop-down list or click  to enter new vendor details
6. Adjust the Review Date, if necessary  
(A reminder Alert will be sent to the SLM based on the default days set in Admin>Setup>Privileges>Requests.)

7. Tick the Customer Timezone option, if relevant  
Apply this option if the User is to view UC due dates using the Customer Timezone or define the UC Timezone.
8. Search and Select a Service Level Manager using the Find Service Level Manager field
9. Move to the Targets tab

| Priority | Response Time | Restoration Time | Resolution Time | 24 x 7 support | Alert |
|----------|---------------|------------------|-----------------|----------------|-------|
| Urgent   | 6 Hours       | 12 Hours         | 24 Hours        | Yes            | None  |
| High     | 12 Hours      | 24 Hours         | 48 Hours        | Yes            | None  |
| Medium   | 18 Hours      | 36 Hours         | 72 Hours        | Yes            | None  |
| Low      | 24 Hours      | 48 Hours         | 96 Hours        | Yes            | None  |

10. Complete the following information:

11.

---

### SLA Editor

---

Targets

Targets

*Common:* Select Common if the UC is to apply across Incidents, Requests, Problems and Change Management.

*Per Process:* If the UC is specific to a Process, select Per Process and choose a Process displayed in the drop-down list.

Interval

Define if the time is to be calculated in Hours or Minutes.

Service Time

Priority

Urgent, High, Medium and Low

Milestones

Initial Response

The maximum time the Customer would wait from the point of request creation before receiving a Note update for a Technician. The Response trigger is stopped when a Note has been added to the request by the assigned Technician and an email is sent to the Customer. If the Response Time is reached, without a Note being added, the request will be escalated.

---



---

**SLA Editor**

---

|                   |  |
|-------------------|--|
| Restoration Time  | The maximum time the Customer would wait from the time the request was created until a workaround or temporary fix has been implemented. The Restoration trigger stops by assigning the request a Workflow State that has to the UC Restoration option set to Yes. By default, this Workflow State is Open - Restored. |
| Resolution Time   | The taken time from the point of request creation until it the request is moved to a Workflow State with the UC Resolution option set to Yes. Any of the default Workflow Exit States stop the Resolution Timer.   |
| Notify Override   | If the system is to override the default notification method set for a request when the Priority being edited is assigned to a request, check this option.   |
| Notification Type | Set Email or SMS as the type of notification when the override action is applied to a Priority.  |
| Alerts            |  |
| Reminder          | Sends a reminder email to the Technician when the defined percentage of time elapses for a Response, Restoration or Resolution target that has not been met on a request. Can be set up to 200% of the UC. Note, Alert intervals are not cumulative.   |
| Warning           | Sends a warning email to the Technician when the defined percentage of time elapses for a Response, Restoration or Resolution target that has not been met on a request. Can be set up to 200% of the UC.  |
| Escalation        | Escalates the request to a higher escalation layer when the defined percentage of time elapses for a Response, Restoration or Resolution target that has not been met on a request. Can be set up to 200% of the UC. It should be noted that the Service Level Manager is also notified when an OLA is breached.       |
| Support           |  |
| 24 x 7            | Do not amend if the UC is to apply 24 hours a day, 7 days a week.  |
| Normal Support    | Select if service hours are to be defined for the UC. When checked, define the service hours by either selecting a template (Templates are configured by the Administrator in the Setup>Localization>Hours tab) or manually define the days and time by making selections within the drop-down lists.                  |

---

12. Add one or multiple Warning Alerts, if required.

Enter the percentage of time to elapse for each interval, which will trigger a Warning to be sent via email to the Service Level Manager when the specified percentage is reached.

---

**NOTE:** Trigger intervals are not cumulative

For example, the Urgent default times of 6, 12 and 24, mean 6 hours for the Response stage, 12 hours for Restoration from initial creation, and 24 hours to reach the Resolution from initial service request creation.

---

1. Define the support hours

Within the Targets tab of the Underpinning Contracts Editor screen the default support hours are set to 24x7.

For 24 X 7, if the UC's urgent Initial Response field is set to six hours, and an urgent request that uses the UC is created at midnight in the assigned Technician's time zone, those six hours will expire by 6:00 AM. This is the option to use if your support is staffed 24 hours a day. Normal support ensures request timers do not run when Technicians are not available. For instance, if the support hours are 9:00 AM to 5:00 PM and the SLAs are as such, the urgent requests' timer would not start ticking until 9:00 AM the following business day and would expire at 3:00 PM.

2. Click Save

3. Click Done.

## 1.16.2 States Tab

The Underpinning Contract States tab lists the Workflow stages that are associated with the Underpinning Contract. This association is made within the relevant States of the Workflow and cannot be edited within this screen. See: [Workflows](#).

## 1.17 Incident & Problem Workflows

Workflows define the sequence of States to be followed by requests logged with the application. Within the system an unlimited number of Workflows can be configured for Incident and Problem Management.

When deployed, the system includes one fully customizable Workflow for each of the Incident and Problem Management Processes. These can be used immediately, or can be edited to reflect more comprehensively your support service requirements.

### 1.17.1 SLAs and Workflows

Each Workflow can be associated with one or more SLAs. The SLA provides the contract time that must be met by requests using the Workflow.

For example, if the Service Desk uses one Incident Workflow, which has multiple SLAs assigned to it, logged Incidents follow the same Lifecycle but the time allowed within each stage is based on the SLA contract requirements. The SLA assigned to either the Item, Customer, Organizational Unit or Incident determines which Workflow is selected for the Incident.

### 1.17.2 Editing default Incident and Problem Workflows

Incident and Problem Workflows can be configured to reflect the organizational Service Desk requirements for these processes. The default Workflows include States that are used by the business logic of the application to maintain control of the request Lifecycle.

It is recommended that the Selected States used by the application, as indicated by an asterisk, not be removed from the Workflow Lifecycle. However, other Available States can be added to the Selected States list.

The following table contains the default Incident and Problem Workflow States.

The \* denotes the system-used States.

| <b>Default State</b>         | <b>Description</b>  |
|------------------------------|---|
| Cancelled                    | Used to cancel a request when it is no longer to be worked on.  |
| Cancelled Unpaid*            | Used by the system from the Pending - No Contract State when Contracts and Invoices are enabled. See <a href="#">Billing</a> .  |
| Closed Resolved              | Used when the request has been resolved. This is the Default Closed State for the Incident and Problem Workflows. This start marks the end of SLA timing and is used when measuring SLA times for Reports.  |
| Closed Restored              | Used when the request has been closed and the service restored for the Customer. This start marks the end of SLA timing and is used when measuring SLA times for Reports.   |
| On Hold                      | Used when the request is on hold. By default this State stops SLA timing.   |
| On Hold - Client Action      | Awaiting a response from the Customer. When a Note is added to the request by the Customer, the system will change the status to Open.  |
| On Hold - Pending Approval*  | An Incident automatically moves to this State when the "Propose" button is used for sending an Incident Note. This means the CloseRequest email is sent to the Customer asking them to verify the proposed Solution. If the Customer does not respond to the email, the request is automatically closed by the number of days set within the Handshaking Privilege. (The email handshaking option is set by the Administrator in Setup>Privileges> Requests.)<br><br>By clicking on the URL provided in the email, the Customer ensures the request retains an open and active state. |
| On Hold - Process Escalated* | A request moves into this state when a Problem or Change has been created within the Analysis tab of the request. The timer stops and there are no future States as the request will be closed when the related Problem or Change is closed.  |
| Open                         | Used to indicate that the request is currently open.  |
| Open Restored                | Used to identify that initial service to the Customer has been restored, or a Workaround is in place but the request is not resolved. This State stops the initial Response Timer if a Note has not been added to the request by a Technician.  |
| Pending                      | The default first State for new requests.   |

| Default State          | Description  |
|------------------------|--|
| Pending - No Contract* | Used when a request is created but there is no active Contract. A Contract needs to be created for either the Customer, Incident/Problem, Item or Organizational Unit.<br><br><b>NOTE:</b> Do not use this State as the Default Open State for a Workflow. |

### 1.17.3 Editing Template Workflows

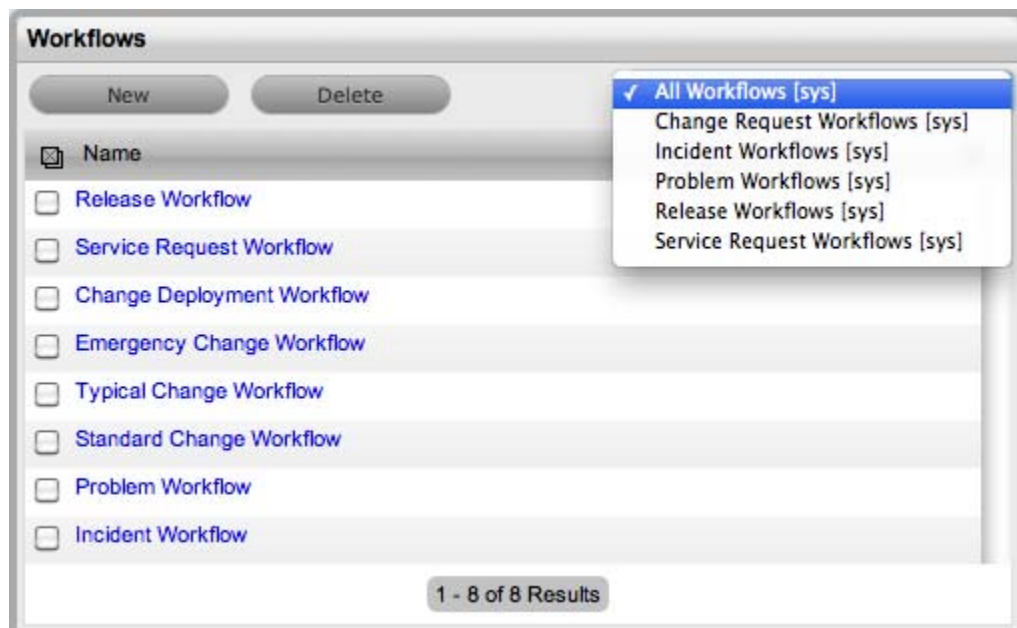
Prior to creating or editing existing Workflows, it is suggested that the preferred Workflow Lifecycle be mapped externally to the application.

If States are to be added or removed from the Workflow, it is recommended that all changes be made to the Current States list within a Workflow's Lifecycle tab, prior to mapping the Lifecycle. This ensures that all relevant status options exist in the Available States field, for allocation to the Previous and Next Workflow States.

Once the Workflow Lifecycle has been defined, edit an existing Workflow by:

1. Select Service>Workflows

The Workflows screen appears.



2. Click the Workflow name hyperlink to modify or duplicate an existing template

Or, select New to create an entirely new Workflow. The Workflow tab appears and is used to define the Name, select the Process, set the default Open and Closed States for the Workflow. The States available within these lists are all those marked as an Entry or Exit point in the Lifecycle tab

3. Click Edit

The Duplicate button is displayed, select if relevant.

4. Complete the details of a new Workflow

Enter the Name, select the Process and enter a Description and click Next.


5. In Edit mode amend relevant details within the Workflows tab:

6.

| Field Name            | Description   |
|-----------------------|---|
| Workflow Name         | Enter a relevant name for the Workflow.   |
| Process               | Select from the drop-down options the process type of Incident or Problem Workflow.   |
| Default Open Status   | The open State that a request adopts when it is assigned the Workflow.  |
| Default Closed Status | The closed State that indicates the request has reached the end of the Workflow Lifecycle.  |
| Email Note Action     | <p>This applies to requests that are in a non-active SLA State (i.e., where the SLA Active option is set to No). The option selected here determines the system behavior, regarding an SLA inactive request, when an email is received from a Customer.</p> <ul style="list-style-type: none"> <li>◆ Do Nothing: Means the status of the request remains the same and the SLA timers are not re-activated. The email is added as a Note and also sent to the Technician.</li> <li>◆ Update Status: Means the status of the request is changed to an SLA Timer Active state, the email is added as a Note and it also sent to the Technician.</li> </ul> |

| Field Name       | Description   |
|------------------|---|
| Update Status to | This field is displayed when the Update Status option is selected for the Email Note Action field. It allows the User to set a Next State, which is defined as an SLA Timer Active State, where a request will move to after an email has been received from a Customer regarding a request in an inactive SLA State. |
| SLA              | Allows the User to assign an SLA to govern the lifecycle period of the Workflow.(See SLAs & Workflows above, for more information.)<br><br>One or more SLAs can be associated with the Workflow.  |
| Description      | Defines the purpose of the Workflow   |

- Use the Find SLA option to change or add SLAs assigned to the Workflow

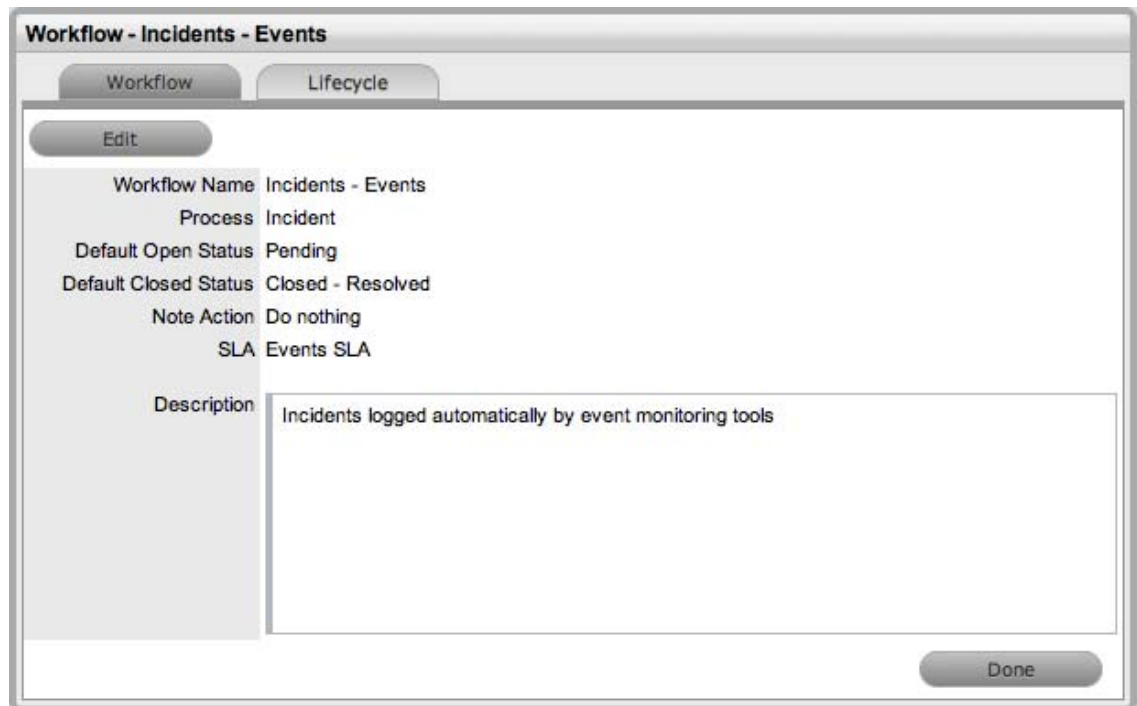
Click  to access the complete list of SLAs in the system. Refer to the above section for more information regarding SLAs and Workflows.

- Edit the brief description that explains the purpose of the Workflow, if required

**NOTE:** The Contract Time field is visible when OLAs and/or Underpinning Contracts are associated with the Workflow States

It displays the accumulated amount of time of the OLAs and/or Underpinning Contract associated with the stages of the Workflow. This contract time cannot exceed the resolution time of the SLA assigned to the Workflow.

- Click Save



**Workflow - Incidents - Events**

Workflow Lifecycle

Edit

Workflow Name Incidents - Events

Process Incident

Default Open Status Pending

Default Closed Status Closed - Resolved

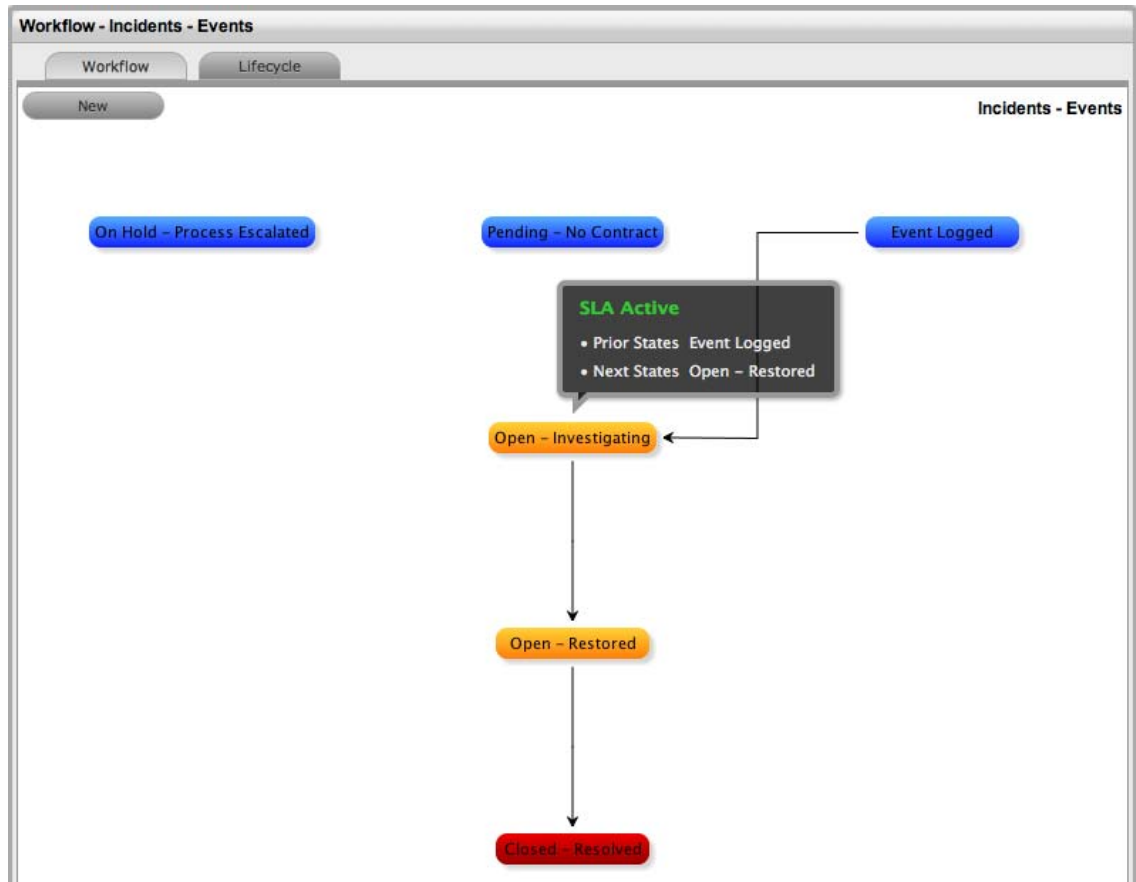
Note Action Do nothing

SLA Events SLA

Description Incidents logged automatically by event monitoring tools

Done

2. Select the Lifecycle tab to define Workflow States



## 1.17.4 Adding or editing Workflow States:

1. Edit the State details

Click the State name hyperlink in the Workflow map or in the table of States, to display the Status information screen. Or, click New to create a new Workflow State.

**Workflow - Incidents - Events**

Workflow Lifecycle **Status**

**Status**

Name

Active State  Yes  No

Entry Point

Exit Point

Has Notes

Listener Class

**Service**

SLA Active  Yes  No

SLA Restoration  Yes  No

SLA Resolution  Yes  No

Contract Type  None  OLA  Underpinning Contract

**Previous States**

| Available states   | Selected states |
|--|-----------------|
| On Hold - Pending Appri<br>On Hold - Process Escal<br>Open - Restored<br>Pending - No Contract | Event Logged    |

**Next States**

| Available states                              | Selected states                      |
|---|--------------------------------------|
| Cancelled - Unpaid<br>On Hold - Pending Appri | Closed - Resolved<br>Open - Restored |

Delete Cancel Save

---

**Status**

Name

System Required States, the States marked with an asterisk in the States Table, can be re-named if desired. For newly created States, enter a name.

---



---

**Status**

---

|                 |   |
|-----------------|---|
| Active State    | <p>Assign Yes for requests to be available in the Home tab by default, when assigned to this stage of the Workflow.</p> <p>Yes should be used for States where the User is actively working on the request or waiting for updates."No" generally applies to Workflow exit points and will only be available by default within the relevant Process tab list view.</p> |
| Entry Point     | <p>An Entry Point is used to indicate the start of a Lifecycle. To make the state a Workflow Entry Point, select the Entry Point checkbox.</p> <p>As the Entry Point is the first state, the Previous States field will be removed.</p>   |
| Exit Point      | <p>Select whether the State will be an Exit Point. An Exit Point is used to indicate the end of a Lifecycle.</p> <p><b>NOTE:</b> A Workflow can have only one Entry Point but multiple Exit Points.</p>   |
| Has Notes       | <p>Allows the Supervisor to include instructions or add relevant details for requests that move into this State. The information is configured within the Articles tab that is displayed when this option is enabled.</p>   |
| Listener Class  | <p>This field is visible if the Outbound Web Services option is enabled in the Admin&gt;Setup&gt;Privileges&gt;System tab.</p> <p>Complete this field, if assigning this State to a request is to trigger an event in an external system.</p> <p>This field should contain the name of a Java class that implements the interface.</p>                                |
| SLA Active      | <p>Links the status with timing set within SLAs and OLAs. When the option is set to No, the SLA/OLA timers stop and the triggers for escalations and warnings do not fire.</p>  |
| SLA Restoration | <p>When timing is set using SLAs and OLAs, the SLA Restoration Time trigger is disabled when the request is moved to this state. Restoration Time indicates a Customer has access restored or a temporary workaround. Reports on Restoration Time are measured from when the Restoration Time trigger is disabled.</p>  |
| SLA Resolution  | <p>Allows the State selected to be used to mark the SLA Resolution Time. This will be used in SLA reporting.</p>  |

---

---

**Status**

---

|                 |   |
|-----------------|---|
| Contract Type   | Defines if the Workflow State will be managed by an internal (OLA) or external (Underpinning Contract) support agreement. If OLAs or Underpinning Contracts are assigned to a Workflow Lifecycle, the Workflow SLA Resolution Time cannot be exceeded by the sum of Resolution Times for all Contract Types assigned to the Workflow Lifecycle. |
| Assign SLM      | This field is displayed when an UC is associated with the Workflow State. Use this field to define if the request ownership is to be maintained by the Assigned Technician or moved to the Manager of the SLA associated with the request.  |
| Previous States | If the State is not an Entry Point, use the arrow button to select Previous States from the Available States and choose when this State will appear as a drop-down menu option in the Next Action field.  |
| Next States     | If the State is not an Exit Point, use the arrow button to select the Next States. A request can move to, in the Next Action field of a request Information Summary tab.  |

---

2. Delete the State if required, or Name/Rename the State
3. Enter all State information up to the SLA Resolution field
4. Save the updated State details

---

**NOTE:** It is recommended all States that are to be included in the Workflow be added or re-named now

After all States have been entered in the system, the mapping of the Workflow can be more easily achieved.

---

1. Continue to edit, add or delete States until all relevant States exist for the Workflow
2. To create the Workflow Lifecycle, States need to be assigned to the transitional states of Previous and/or Next  
To move Available States to the Previous State or Next State field, open the Status Details screen by clicking the State object in the Workflow map or select the State hyperlink in the table beneath the Workflow map.
3. Assign States to be Next and/or Previous States  
For the Current Status highlight an option in the Available State list and click the right-pointing arrow to move it to the Selected States field.
4. **NOTE:** When a State is used as a Previous and a Next State, it allows a request to move forward and backward in a Lifecycle  
An Open State cannot have any previous States and a Closed State cannot have any Next States.
5. Click Save to return to the Workflow map and to access other States to build on the Workflow Lifecycle
6. Repeat Steps 14 to 16 until all transitional stages of the Workflow have been mapped

---

**NOTE:** To successfully save a Workflow, the sum Resolution Time of the individual Contract Types assigned to each transitional state of the Workflow Lifecycle, must be less than or equal to the Workflow's SLA Resolution Time

---

1. Click Save.

The visual representation of the Workflow is displayed.

## 1.17.5 Workflow Map

The Workflow Map is a visual representation of the Workflow Lifecycle. The map displays the relationship between each Lifecycle State by using different colors to represent the type of Lifecycle State.

---

### Color

---

|        |   |
|--------|---|
| Blue   | Indicates the Entry point of the Lifecycle. |
| Orange | Is a Transitional stage of the Lifecycle.   |
| Red    | Indicates the Exit point of the Lifecycle.  |

---

Detailed information about a Lifecycle State can be accessed by clicking on the State field within the map.

## 1.17.6 Deleting a Workflow State

It may be necessary to delete a default State or a State that is no longer in use. Note that a State cannot be deleted if it has been assigned to a request.

To delete an unused State:

1. Select Service>Workflows
2. Click on the Workflow Name hyperlink
3. Click on the State Name hyperlink in the States Table beneath the Workflow Map
4. Click Delete
5. Select Save.

The State will be erased from the States list.

## 1.18 Billing: Contracts and Invoices

Billing within the system allows support organizations to manage their Customers' service and support contracts. This can be achieved by the system Administrator enabling the preferences of Contracts, with or without the preference of Invoices, within the Billing option of the Setup tab.



When Contracts are enabled without Invoices, system contracts can be created without the need for charging Customers for the support provided. Whereas, the Contracts option combined with Invoices allows the application to manage service contracts and process payment within the one facility.

There are a number of Contract Types available within the system, and these include:

- ♦ Per Request - covers the period of time for which the request is open and work completed
- ♦ Per Item - covers the Item, regardless of the number of requests logged against the Item but can be created for the following:

*Subscription* - a contract that covers a specified period of time

*Time Limited Subscription* - a contract that covers either a specific time period or number of support hours, whichever limit is reached first

*Support Hours* - a contract that defines the number of support hours covered

*Support Hours by Month* - a contract that covers a total number of support hours purchased for a defined timeframe and allocated on a per month basis.

When Billing is enabled in the application's Setup, a maintenance contract must exist for either a Customer, Organizational Unit or Item, before a request can be processed. For more information on creating a maintenance contract see [Contracts](#).

## 1.18.1 Contract Validation Process

When a request is created and Contracts are enabled with Invoices, the system validates the contract status for a Customer, Organizational Unit or Item. As part of the contract validation process, the application selects the first element found on this list:

1. Customer (with a valid contract)
2. Org. Unit (with a valid contract)
3. Item (with a valid contract)
4. Customer (with a pending contract)

5. Org. Unit (with a pending contract)
6. Item (with a pending contract)
7. No contract found, then either a Per Request or Per Item contract is created through the request.

---

**NOTE:** When a Pending Contract is selected, the Contract must be processed before work can be undertaken on the request.

---

## 1.19 Service Request & Change Management Workflows

Service Request and Change Management Workflows define the sequence of States to be followed by Service Requests and Change Requests (RFC) logged with the Service Desk. These Workflows are unlimited and fully configurable, to cover the diverse range of business change implementations required by an organization.

### 1.19.1 SLAs and Workflows

Each Workflow can be associated with one or more SLAs. The SLA provides the contract time that a Workflow must adhere to.

For example, if the Service Desk uses a Change Workflow, which has multiple SLAs assigned to it, Change Requests that use that Workflow follow the same Lifecycle but the time allowed within each stage is based on the SLA contract requirements. The SLA assigned to either the Item, Customer, Organizational Unit or Request determines which Workflow is selected for the Change Request.

### 1.19.2 Approval States

Approval States in Service Request and Change Workflows provide the facility for Customers, Line Managers and Manager Users to accept or reject Request activity. If a State has the Approval State option enabled, the type of Approval determines who, be it a Manager or Customer User, is assigned to the State and it is not possible for other User Roles to also be assigned to the State.

Requests assigned a Customer or Line Manager Approval State can be processed through the Customer Portal or via Email. A request can only be assigned a Line Manager Approval State if the Customer associated with the Request is assigned with a Line Manager within their Customer Information screen. The system will validate this association prior to saving the Request and the User assigned to the Request when moved into the Line Manager Approval State will be the Line Manager defined in the Customer Information screen. When Requests are in a Customer or Line Manager Approval State, the only User who can edit the Request is the Team Lead.

Team Manager Approval States only allow Users with the Manager Role to be assigned to the State. It should be noted that a Technician, Supervisor or Partner User can also be assigned a Manager Role within their User Information screen, which will allow them to be assigned as Managers in the Team and then to Manager Only Approval States. The Managers are associated with an Approval State within the Team Information screen. First, define the Manager Group within the Group tab of the Team Information screen, and then assign that Group to the relevant Workflow State in the States tab of the Team Information screen.

For more information about Manager assignment to Approval States, see: [Service & Change Teams](#).

### 1.19.3 Editing a Default Workflow

To edit a Service Request or Change Workflow:

1. Select Service>Workflows

The Workflows screen appears.

2. Click the Workflow name hyperlink to modify or duplicate an existing template

Or, select New to create an entirely new Workflow. The Workflow tab appears and is used to select the Process, set the default Open and Closed States for the Workflow. The States available within these lists are all those marked as an Entry or Exit point in the Lifecycle tab.

3. Click Edit

The Duplicate button becomes available, select if relevant.

4. Complete the details for a new Workflow

Enter the Name, select the Process and enter a Description and click Next.


5. In Edit mode amend relevant details within the Workflows tab:

6.

| Field Name            | Description  |
|-----------------------|--|
| Workflow Name         | Enter a relevant name for the Workflow.  |
| Process               | Select from the drop-down options the process type of Change or Service Request Workflow.  |
| Default Open Status   | The open state that a Request adopts when it is assigned the Workflow.                     |
| Default Closed Status | The closed state that indicates the Request has reached the end of the Workflow Lifecycle. |

| Field Name        | Description   |
|-------------------|---|
| Email Note Action | <p>This applies to Requests that are in a non-active SLA State (i.e., where the SLA Active option is set to No). The option selected here determines the system behavior, regarding an SLA inactive Request, when an email is received from a Customer.</p> <ul style="list-style-type: none"> <li>◆ Do Nothing: Means the status of the Request remains the same and the SLA timers are not re-activated. The email is added as a Note and also sent to the Technician.</li> <li>◆ Update Status: Means the status of the Request is changed to an SLA Timer Active State, the email is added as a Note and it also sent to the Technician.</li> </ul> |
| Update Status to  | <p>This field is displayed when the Update Status option is selected for the Email Note Action field. It allows the User to set a Next State, which is defined as an SLA Timer Active State, where a request will move to after an email has been received from a Customer regarding a Request in an inactive SLA State.</p>  |
| SLA               | <p>Allows the User to assign a SLA to govern the lifecycle period of the Workflow.(See SLAs &amp; Workflows above, for more information.)</p>   |
| Description       | <p>Defines the purpose of the Workflow</p>  |

7. Use the Find SLA option to change or add SLAs assigned to the Workflow

Click  to access the complete list of SLAs in the system. Refer to the above section for more information regarding SLAs and Workflows.

**Workflow - Standard Change Workflow**

Workflow Lifecycle

Duplicate

Workflow Name | Standard Change Worl

Process Change

Default Open Status Pending - CAB

Default Closed Status Closed (Verified) - CAI

Note Action  Do nothing  Update status

SLA  Gold

Find SLA (Name)

SLA

Events SLA

Gold

Silver

Warranty

1 - 4 of 4 Results

Description | Configurable Standard Change Management workflow

Cancel Save

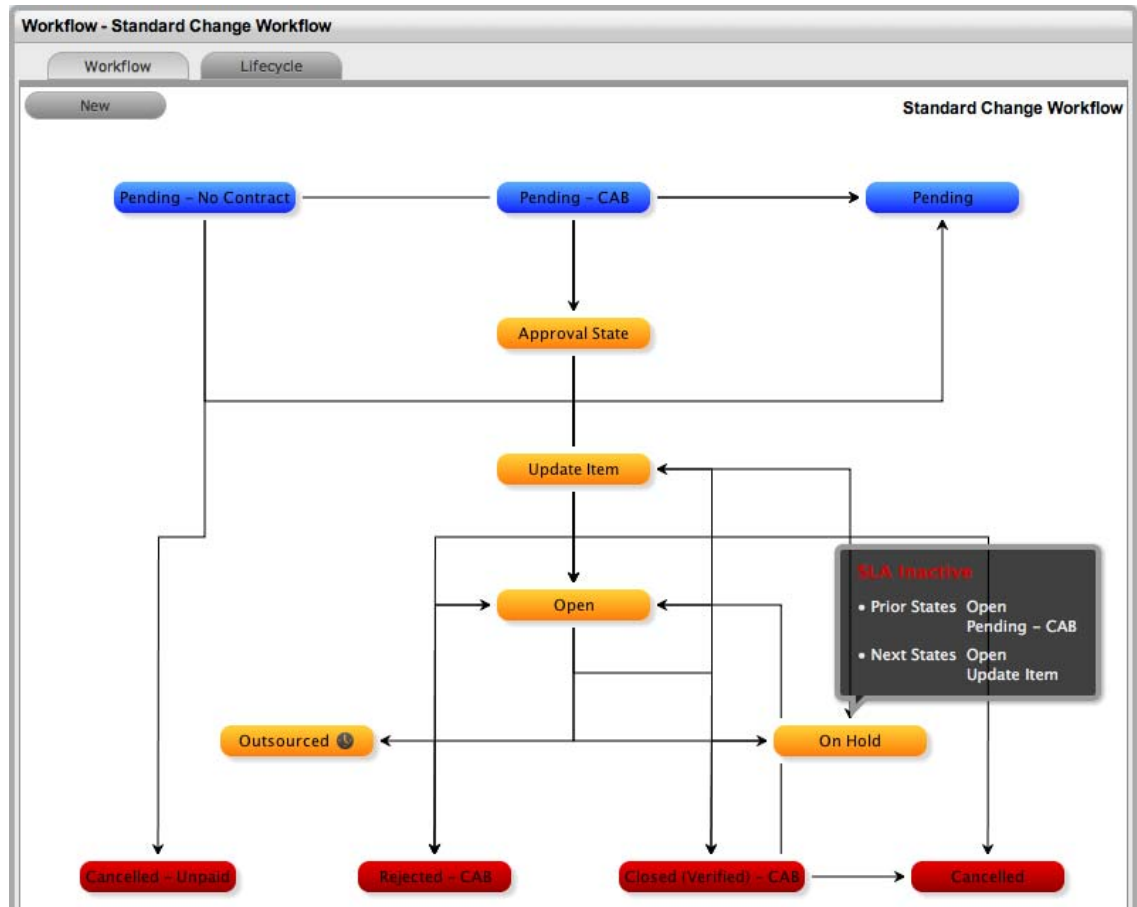
- 
8. **NOTE:** The Contract Time field is visible when OLAs and/or Underpinning Contracts are associated with the Workflow States

It displays the accumulated amount of time of the OLAs and/or Underpinning Contract associated with the stages of the Workflow. This contract time cannot exceed the resolution time of the SLA assigned to the Workflow.

- 
9. Edit the brief description that explains the purpose of the Workflow, if required
10. Click Save



11. Select the Lifecycle tab to create or modify Workflow States



#### 1.19.4 Adding or editing Workflow States:

1. Click the State field in the Workflow map or State name hyperlink to display the Status information screen

Or, click New to create a new Workflow

State.

2.

---

**Status**

Name


System Required States, the States marked with an asterisk in the States Table, can be re-named if desired. For newly created States, enter a name.

---

---

**Status**

---

|                |   |
|----------------|---|
| Active State   | <p>Assign Yes for requests to be available in the Home tab by default, when assigned to this stage of the Workflow.</p> <p>Yes should be used for States where the User is actively working on the request or waiting for updates. No generally applies to Workflow exit points and will only be available by default within the relevant Process tab list view.</p>  |
| Approval State | <p>Sets the Status as an Approval State. This allows a Manager User to be assigned to this State, which enables them to approve or reject a Request when it moves into this stage of the Workflow.</p> <p><b>NOTE:</b> An Entry/Exit status cannot be an Approval State.</p>  |
| Item Editable  | <p>Select this option to allow the details of an Item to be edited when a Request is moved into this State .</p> <p>When this option is enabled for a Workflow State,  is visible next to the Item Type link in the Summary tab of the Request.</p>  |
| KBA Approval   | <p>Enable this option as part of the KBA Approval process, which displays the Accept, Revise and Reject buttons for the User to publish, advise content revision or reject content.</p> <p>Enabling this option, removes the Next States fields and requires the User to define where the request will move to if the Accept and Reject buttons are selected. If the Revise button is selected, the Request will move to the "On Hold - KBA Rework" system state. See:<a href="#">KBA Content Approval</a>.</p> |
| Entry Point    | <p>An Entry Point is used to indicate the start of a Lifecycle. To make the state Workflow Entry Point, select the Entry Point checkbox.</p> <p>As the Entry Point is the first state, the Previous States field will be removed.</p>   |
| Exit Point     | <p>Select whether the state will be an Exit Point. An Entry Point is used to indicate the end of a Lifecycle.</p> <p><b>NOTE:</b> A Workflow can have only one Entry Point but multiple Exit Points.</p>  |
| Has Notes      | <p>Allows the Supervisor to include instructions or add relevant details for Requests that move into this State. The information is configured within the Notes tab that is displayed when this option is enabled.</p> <p>Information and attachments included on the Notes tab, are displayed as a scroll-over when the Request moves into the State.</p>  |

---

---

**Status**

---

|                 |   |
|-----------------|---|
| Listener Class  | <p>This field is visible if the Outbound Web Services option is enabled in the Admin&gt;Setup&gt;Privileges&gt;System tab.</p> <p>Complete this field, if assigning this State to a request is to trigger an event in an external system.</p> <p>This field should contain the name of a Java class that implements the interface <code>com.livetime.ws.listenWorkflowListener</code> that has been compiled into a jar file and added to the LiveTime classpath. Please contact support for further details.</p> |
| SLA Active      | <p>Links the Status with timing set within SLAs and OLAs. When the option is set to No, the SLA/OLA timers stop and the triggers for reminders, escalations and warnings do not fire.</p>   |
| SLA Restoration | <p>If the 'Yes' option is selected for SLA Restoration, it means that Requests that move into this Stage of the Workflow have met the SLA Restoration Time.</p>   |
| SLA Resolution  | <p>If the Yes option is selected for SLA Resolution, it means that Requests that move into this Stage of the Workflow have met the SLA Resolution Time.</p>   |
| Contract Type   | <p>Defines if the Workflow State will be managed by an internal (OLA) or external (Underpinning Contract) support agreement. If OLA's or Underpinning Contracts are assigned to a Workflow Lifecycle, the Workflow SLA Resolution Time cannot be exceeded by the sum of Resolution Times for all Contract Types assigned to the Workflow Lifecycle.</p>   |
| Assign SLM      | <p>This field is displayed when an UPC is associated with the Workflow State. Use this field to define if the request ownership is to be maintained by the Assigned Technician or moved to the Manager of the SLA associated with the request.</p>  |
| Previous States | <p>If the State is not an Entry Point, Previous States can be assigned to the Workflow stage. Highlight the relevant State and use the arrow button to move Available States to the Previous States field. These options designate the Workflow stages a Request can come from, before it arrives in this Workflow State.</p>   |
| Next States     | <p>If the State is not an Exit Point, Next States can be assigned to the Workflow state. Use the arrow button to select the Next States from the Available States. These options are included in the Next Action drop-down menu of a Request.</p>   |

---

---

**Status**

---

|              |  |
|--------------|--|
| Accept State | (Visible when the Approval State or KBA Approval option is Yes.)   |
| Approval     | <p>Displays the States that a Request can move to when a Request action is Accepted. Select the appropriate State, for the system to automatically route the Request when the Accept option is selected.</p> <ul style="list-style-type: none"><li>◆ <i>Customer</i> when selected, means the request will be assigned to the Customer associated with the request to accept/reject request activity. The Customer will be able to access the accept/reject icons in the Customer Portal to process the request.</li><li>◆ <i>Line Manager</i>, select if the request is to be forwarded to a system user with the Customer Role, who will process the approval in relation to the Customer associated with the request. The Customer/Line Manager will be able to access the accept/reject icons in the Customer Portal to process the request.</li><li>◆ <i>Team Manager</i> select if a single Manager User assigned to the Team is to process the Request.</li><li>◆ <i>Team Managers#</i> if selected, set the number of Managers that are required to Approve the Request before the system will automatically apply the defined Accept or Reject State.</li><li>◆ <i>Team Managers%</i> if selected, set the percentage weighting that must be achieved by Managers voting before the system will automatically apply the defined Accept or Reject State. When selected, define the percentage weighting.</li></ul> |
| Reject State | <p>(Visible when the Approval State or KBA Approval option is Yes.)</p> <p>Displays the States that a Request can move to when a Request action is Rejected. Select the appropriate State, for the system to automatically route the Request when the Reject option is selected.</p>   |

---

3. Delete the State if required, or Name/Rename the State
4. Enter all State information up to the SLA Resolution field
5. Save the updated State details

---

**NOTE:** It is recommended that all States that are to be included in the Workflow be added or re-named now

After all States have been entered in the system, the mapping of the Workflow can be more easily achieved.

---

1. Continue to edit, add or delete States until all relevant States exist for the Workflow
  2. To create the Workflow Lifecycle, States need to be assigned to the transitional states of Previous and/or Next  
To move Available states to the Previous State or Next State field, open the Status details screen by clicking the State field in the Workflow map or select the State hyperlink in the table beneath the Workflow map.
  3. Assign States to be Next and/or Previous States  
For the Current Status highlight an option in the Available State list and click the right-pointing arrow to move it to the Selected States field.
- 

**NOTE:** When a State is used as a Previous and a Next State, it allows a request to move forward and backward in a Lifecycle

An Open State cannot have any previous States and a Closed State cannot have any Next States.

---

1. Click Save to return to the Workflow map and to access other States to build on the Workflow lifecycle.
  2. Repeat Steps 13 to 16 until all transitional stages of the Workflow have been mapped.
- 

**NOTE:** To successfully save a Workflow, the sum Resolution Time of the individual Contract Types assigned to each transitional state of the Workflow Lifecycle, must be less than or equal to the Workflow's SLA Resolution Time.

---

1. Click Save.

The visual representation of the Workflow is displayed.

## 1.19.5 Workflow Map

The Workflow Map is a visual representation of the Workflow Lifecycle. The map displays the relationship between each Lifecycle State by using different colors to represent the type of Lifecycle State.

---

### Color

---

|        |   |
|--------|---|
| Blue   | Indicates the Entry point of the Lifecycle. |
| Orange | Is a Transitional stage of the Lifecycle.   |
| Red    | Indicates the Exit point of the Lifecycle.  |

---

Detailed information about a Lifecycle State can be accessed by clicking on the State field within the Map.

## 1.19.6 Deleting an Unassigned Workflow

To delete an unassigned Service Request or Change Workflow:

1. Select Service>Workflow

The Workflows screen appears.

2. Select the checkbox to the left of the Workflow to be deleted
3. Click Delete

The checked Workflow is no longer visible.

---

**NOTE:** A Workflow that belongs to a Team cannot be deleted.

---

## 1.19.7 Deleting a Workflow State

It may be necessary to delete a system default State or a State that is no longer in use. Note that a State cannot be deleted if it has been assigned to a Request.

---

**NOTE:** It is recommended that any States listed in the table of States included on the Life Cycle tab that are not included in the Workflow or used by the system, be removed from the table as all States included here are listed in the States tab when Workflow Technician assignment is being configured. By removing unused States from the table, assigning Technicians to the relevant stages of the Workflow becomes an easier task.

---

To delete an unused State:

1. Select Service>Workflows
2. Click on the Workflow hyperlink
3. Move to the Lifecycle tab
4. Select the State name link in the table of States included in the Lifecycle tab.
5. Click Delete
6. Click Done.

## 1.20 Creating a Service or Change Request Team

Service and Change Request Teams are built around the selected Workflow. Technicians and Managers are assigned to work groups and each State of the Workflow Lifecycle is associated with a selected work group. When a request moves to a next State, it is assigned to a Technician or Manager within the work group associated with that Workflow State. One or multiple levels of escalation can also be configured for the Workflow, which span the lifecycle of the Workflow the Service or Change Team are assigned.

### 1.20.1 Creating a Service Request or Change Team

To create a Service Request or Change Management Support Team:

1. Select User>Teams
2. Click New
3. Enter the Team Name
4. Select the Service or Change Request Process
5. Enter the Team email address, if relevant

6. Define the Team options:

7.

| Options        | Description   |
|----------------|---|
| Process        | Indicates if the Team is to manage Change or Service Requests.  |
| Team Lead      | The Technician assigned to supervise the Team and its activities. Options are visible when the Technicians have been assigned to the Team.  |
| Incoming Email | Enter a specific Email Address for the Team, which allows Customers to use directly. This address will need to be configured as an alias to the system support address on the Email Server. See: <a href="#">Email Polling &amp; Request Creation</a> . |



| Options                 | Description  |
|-------------------------|--|
| Email Display Name      | If desired, enter a name for the Team that will be used in the From address for email responses sent by members of the Team.   |
| Customer Notification   | Sets the default notification method applied to requests for Customer correspondence, when requests are assigned to this Team.<br><br>The Customer Defined option, derives the method of notification from the setting within the Customer's Profile or Account Information tab.   |
| Technician Notification | Sets the default notification method applied to requests for Technician correspondence, when requests are assigned to this Team.   |
| Self Assign             | When enabled, Requests created by a Technician will automatically be assigned to that Technician.  |
| Notify on New           | Determines who is informed about the creation of a new Request.<br><br><i>Technician</i> - notifies only the Technician assigned to the request. (This is the default setting.)<br><br><i>Layer</i> - notifies all members in Layer One of the Team assigned to the request.<br><br><i>Select Team</i> - notifies all members of the Team. |
| Notify on Update        | Determines who is informed when a Request is updated.<br><br><i>Technician</i> - notifies only the Technician assigned to the request. (This is the default setting.)<br><br><i>Layer</i> - notifies all members in Layer One of the Team assigned to the request.<br><br><i>Select Team</i> - notifies all members of the Team.           |
| Notify on Escalate      | Determines who is informed when a Request is escalated.<br><br><i>Technician</i> - notifies only the Technician assigned to the request. (This is the default setting.)<br><br><i>Layer</i> - notifies all members in Layer One of the Team assigned to the request.<br><br><i>Select Team</i> - notifies all members of the Team.         |

| Options  | Description   |
|--|---|
| Request Queue<br>(Service Request Teams only)    | <p>Allows the Team to use a holding bay for Requests that are received via email or the Customer Portal. (This option is visible if it has been enabled by the Administrator.)</p> <p>If the Team has only one Technician assigned to the work group associated with the Workflow Default Entry State, new Requests are automatically assigned to that Technician and that Technician is notified of the new Request assignment.</p> <p>If the Team has multiple Technicians assigned to the work group associated with the Workflow Default Entry State, the new Request is placed in the Queue (i.e., it is assigned to the System User) and all members of the Team are notified that a new Request has been assigned to the Request Queue. See: <a href="#">Queues</a>.</p> |
| Queue Visibility<br>(Service Request Teams only) | <p>When the Request Queue is enabled, the option can be refined to allow the Queue to be available for assigned Workflow entry points, or all stages of the assigned Workflow. If All States is enabled Users can move Requests back to the Queue throughout the Request lifecycle. See: <a href="#">Queues</a>.</p>  |
| Edit Assign<br>(Service Request Teams only)      | <p>When set to Yes and a request assigned to the System User (i.e., Queue) is opened in Edit Mode, the system will automatically assign the request to the User editing the request if they are in the Escalation Layer associated with the request.</p>  |
| Close Assign<br>(Service Request Teams only)     | <p>When set to Yes and a request assigned to the System User (i.e., Queue) is moved to an Exit State of the Workflow, the system will automatically assign the request to the User who prompted the close action.</p>   |
| Strong Authentication                            | <p>If the Manager User Name and Password is required to be re-entered during the processing of a Request in an Approval State, set this option to Yes.</p>  |

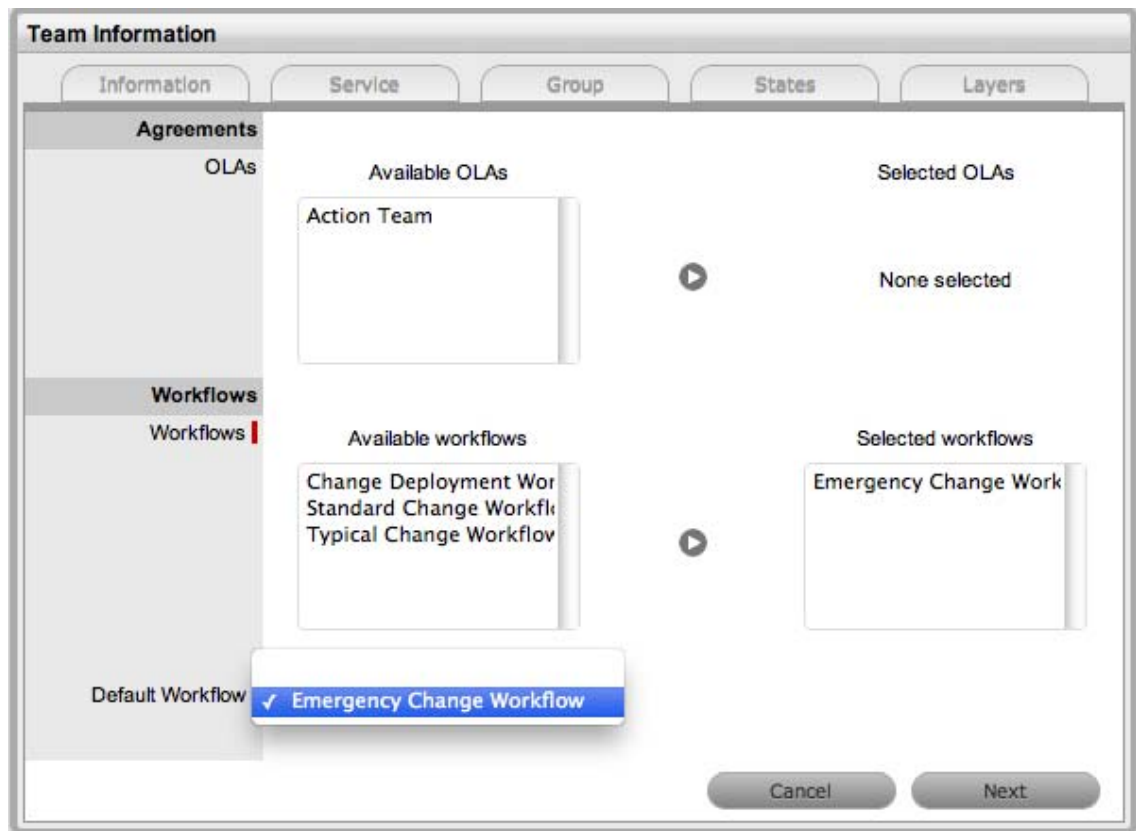
8. Complete the Team Location details, if required
9. Select Technicians from the Available Technicians list
 

Highlight Technician names within the Available Technicians list and click the arrow icon to move the Users to the Selected Technicians list.
10. Select Managers from the Available Managers list
 

This is required if a Manager is to be assigned to a [Workflow Approval State](#).

Highlight Manager names within the Available Managers list and click the arrow icon to move the Users to the Selected Manager list.
11. Click Next
 

The Service Screen displays all Available OLAs and Workflows



12. Assign the relevant OLAs within Available OLAs list (Optional)

Highlight the OLA and click the arrow icon to move an OLA to Selected OLAs list. Assigning an OLA to the Team ensures the Team's details will be selectable when the assigned OLA is associated with a Workflow State.

13. Assign the relevant Workflows within the Available Workflow list

Highlight the Workflow and click the arrow icon to move the Workflow into the Selected Workflows list. Assigning Workflows to the Team ensures the Team is displayed as an option within the Request Summary tab when the associated Workflows are assigned to a Request.

14. Select a Default Workflow from the drop-down list

This is relevant if more than one Workflow is assigned to the Change Team. The Default Workflow is automatically applied to an RFC that has been allocated to this Change Team.

15. Select Next

The Group tab displays the Default Technician Group and Default Manager Group. Within this tab multiple groups of Technicians and Managers can be created that are then associated with the relevant stages of the Workflow.

16. Click on the Default Group link

The Team Lead will automatically be applied to the Group. Rename the Work Group, if relevant. Highlight Technician names within the Available Technicians list and click the arrow to allocate the Technician to the Selected Technicians field.

**Team Information**

Information Service Group States Layers

Emergency Change

Group Name: Default Group

Group Type:  Technician  Manager

Technicians

Available Technicians: Robert Allanby

Selected Technicians: Raj Candy, Marcelina Fidelio, Edward Norton, Simone Supervisor

Delete Cancel Save

- Click Save
- Repeat the process for the Default Managers Group.

**Team Information**

Information Service Group States Layers

Emergency Change

Group Name: Manager Approval Gro

Group Type:  Technician  Manager

Managers

Available Managers: No Managers available

Selected Managers: Edward Norton, Simone Supervisor

Delete Cancel Save

- Click New to create any additional Technician or Manager Groups

**Team Information**

Information Service Group States Layers

Group Name: Implement Group

Group Type:  Technician  Manager

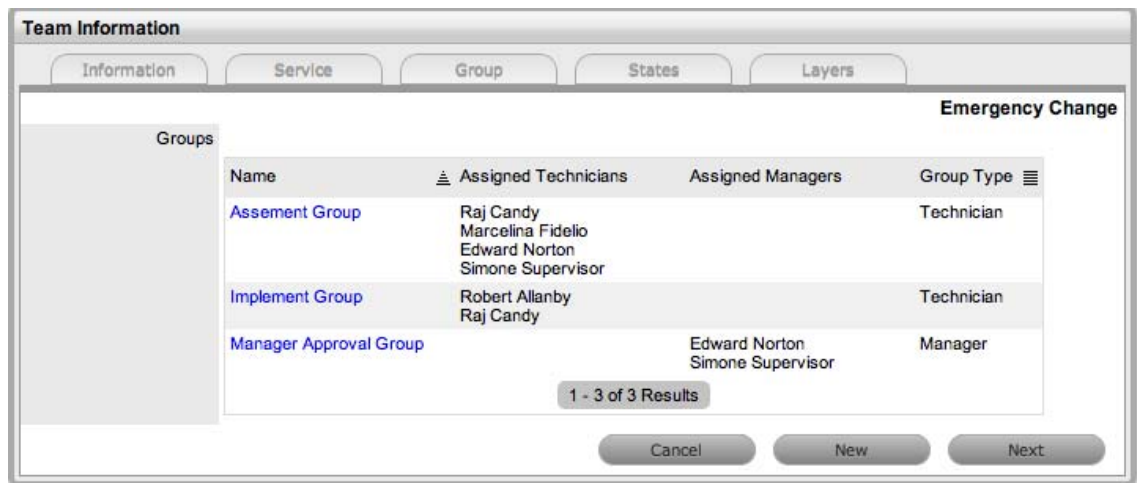
Technicians

Available Technicians: Marcelina Fidelio, Edward Norton, Simone Supervisor

Selected Technicians: Robert Allanby, Raj Candy

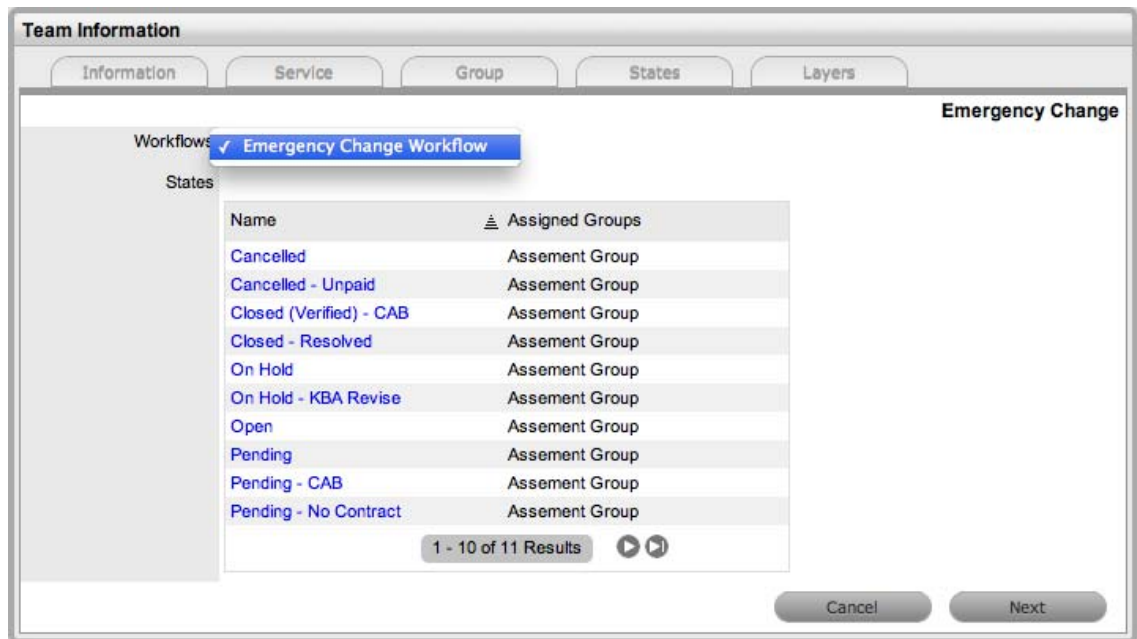
Cancel Save

- Click Save to save the details of a newly created Technician or Manager Group

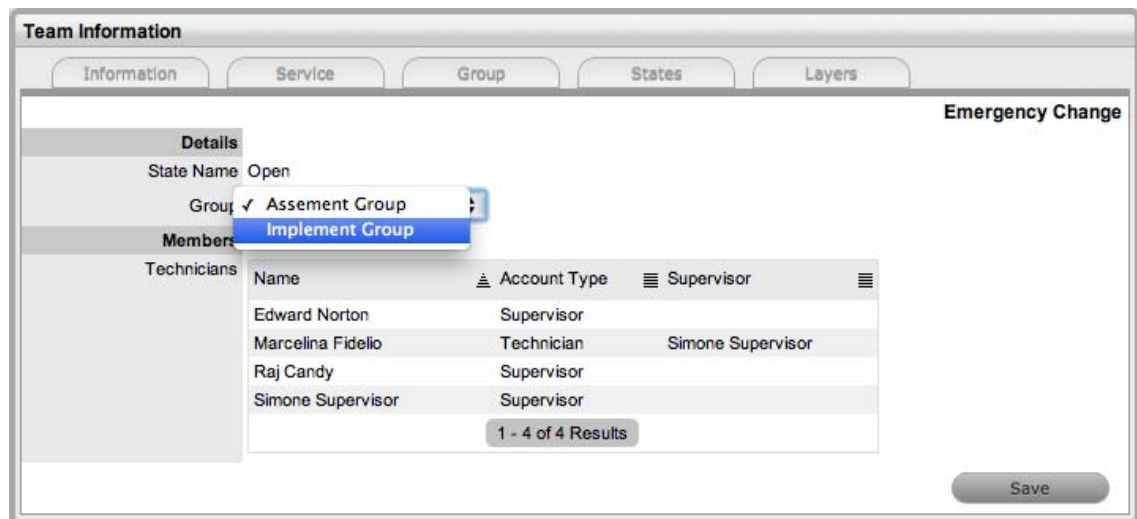


20. Click Next, when all Groups that are required for the Workflow have been created

The Workflows/States of the Workflow Lifecycle are displayed with the system Default Group assigned to each State. The default Manager Group will be assigned to any Manager Approval States.



21. To assign a different Work Group to a Workflow State, click the state Name link



22. Select the relevant Group from the drop-down list
23. Select Save
  - Repeat the Work Group assignment for each State, where relevant.
24. Click Next
  - The Layers tab is displayed, where one or more overarching layers of escalation can be applied to the Workflow.
25. Click on the Layer link to assign the relevant Users to the escalation layer and save
26. Click Save and Done.

To remove a User from a Team:

1. In the User tab, click Users
  - The User Information screen appears.
2. Click on the name of the User
3. Select the Team tab
4. Click on Edit.
  - The Remove button is visible.

## 1.20.2 Manager Approval State assignment

For a Manager User to be allocated the privilege of approving a Change or Service Request they must be assigned to a Change or Service Request Team and an Approval State of the relevant Change or Service Request Workflow. Change Workflows must include Approval States (i.e., States where activities are accepted or rejected) before the option to assign a Manager to a Change Team becomes available. See: [Service or Change Request Workflows](#) for more information.

To assign a Manager to a Workflow Approval State:

1. Go to User > Teams
2. Select a Service or Change Request Team

**Team Information**

Information Service Group States Layers

Duplicate Emergency Change

**Details**

Team Name | Emergency Change

Process | Change Request

Team Lead | Simone Supervisor

Incoming Email |

Email Display Name | Emergency Change

Customer Notification | Customer Defined

Technician Notification | SMS

Live Priority  On  Off

Self Assign  On  Off

Notify on New  Technician  Layer  Team

Notify on Update  Technician  Layer  Team

Notify on Escalate  Technician  Layer  Team

Strong Authentication  On  Off

**Members**

Technicians |

Available Technicians

No Technicians available

Selected Technicians

Edward Norton  
 Marcelina Fidelio  
 Raj Candy  
 Robert Allanby  
 Simone Supervisor

Managers

Available Managers

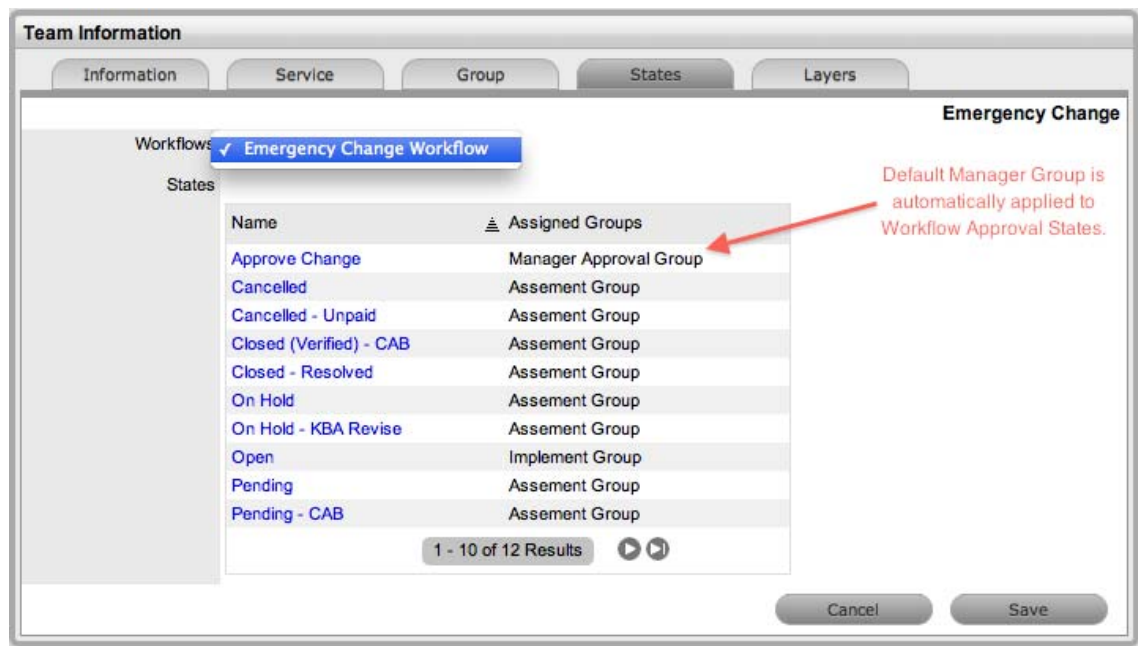
Andrea Scotchmore  
 Vince Tatty

Selected Managers

Simone Supervisor  
 Edward Norton

Delete Cancel Save

3. In Edit mode, assign relevant Managers from the Available Managers list  
 Highlight Manager names within the Available Managers list and click the arrow icon to move the Users to the Selected Manager list.
4. Go to the States tab



5. Select a Workflow

The Default Manager Group, which may have been re-named, is automatically assigned to all Approval States of the selected Workflow.

6. To adjust the assigned Manager Group, select the Approval Workflow State link
7. Select the Manager Group from the drop-down list and save
8. Click Save and Done.

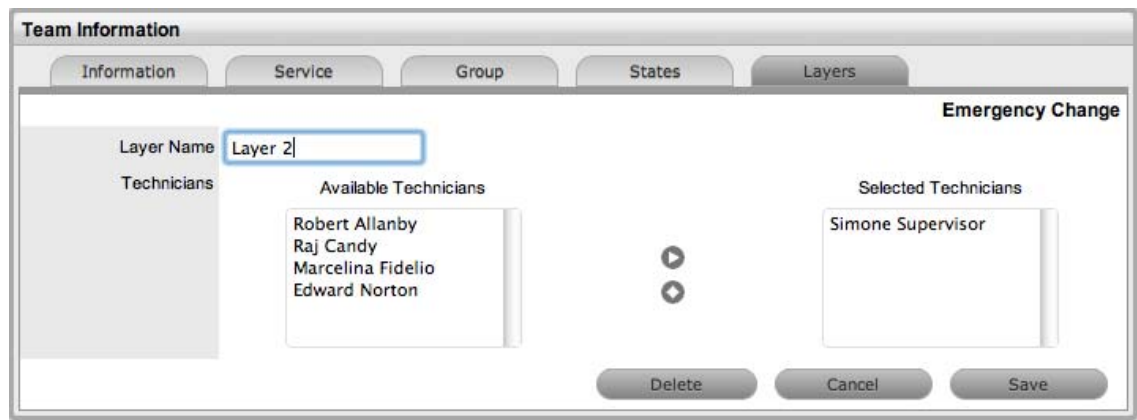
### 1.20.3 Layers Tab

Requests moving through Service or Change Request Workflows can be escalated to the Team Lead or Supervisor User at any stage of the Workflow that is configured as a Manager Approval State. This action can be achieved by using the Escalate button within the Summary tab of the Request.

By default escalation layers are created with the Team Lead assigned. To amend or add to the assignment:

1. Go to User > Teams
2. Select a Service or Change Request Team
3. Click Edit
4. Select the Layers tab
5. Click on the Layer hyperlink





6. Amend the assignment, as required
7. Click Save
  - If additional escalation layers are required, select New and repeat steps 5 to 7.
8. Click Done when all required escalation layers are configured.

## 1.21 KBA Content Approval

When the Control KBA via Request option is enabled in the Setup>Privileges>Request tab, Knowledge Base content with a Pending Publication status automatically generates a Request that requires approval by Users with publishing privileges, before the content is accessible in the Knowledge Base.

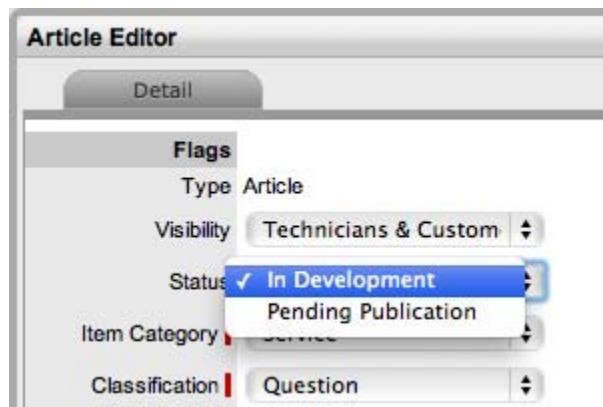
When the User has completed the content and the Article is ready for publication and moved to the Article Status of Pending Publication, a Request is automatically created. When the KBA is assigned the Pending Publication state, the content of the Article can no longer be edited.

Published KBA content that is edited, also results in generating a Request for approval but the Article retains its published state and displays the pre-edited content. Upon approval of the new content, the Article is updated.

### 1.21.1 Creating KBA Approval Requests

New KB content is initially saved with a status of In Development. When this content is ready to be published and if the Control KBA via Request is enabled, the following steps should be followed:

1. Go to the Knowledge > Articles tab
2. Select the Article No. link
3. Click Edit
4. Move the Status to Pending Publication



5. Click Save

The Request Number that was generated is displayed and the KBA moves can no longer be edited.

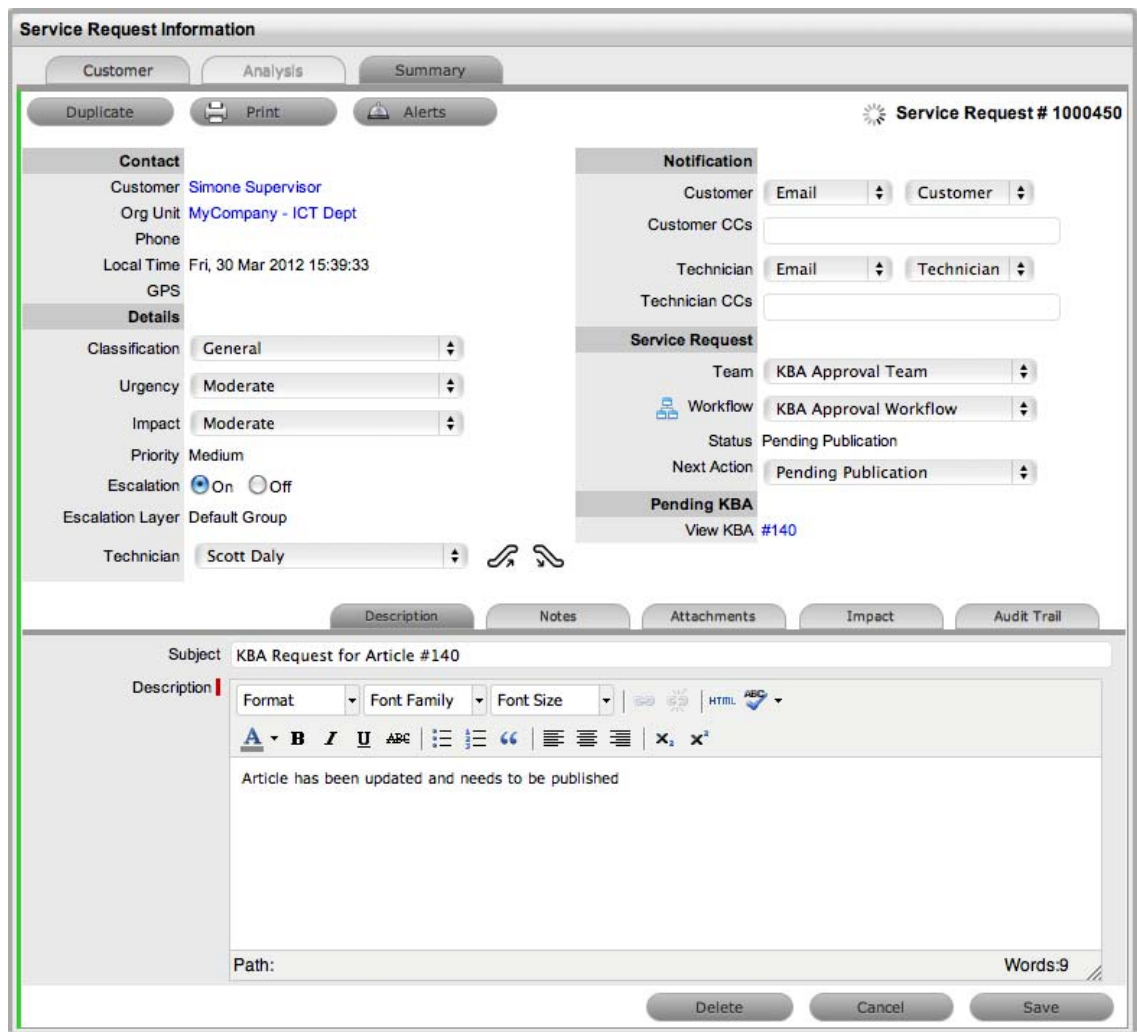


6. Click Done.

## 1.21.2 Managing KBA Approval Requests

KBA Approval Requests are found within the Request or Change tab, as defined in the Control KBA via Request customization. To approve new content within the relevant tab:

1. Select the Request # hyperlink



2. Click Edit
3. Select the View KBA link  
The contents of the KBA is displayed.
4. Click Done  
The screen returns to the Summary tab.
5. Move the Request to the Approval State



6. Click Save
7. Click Edit

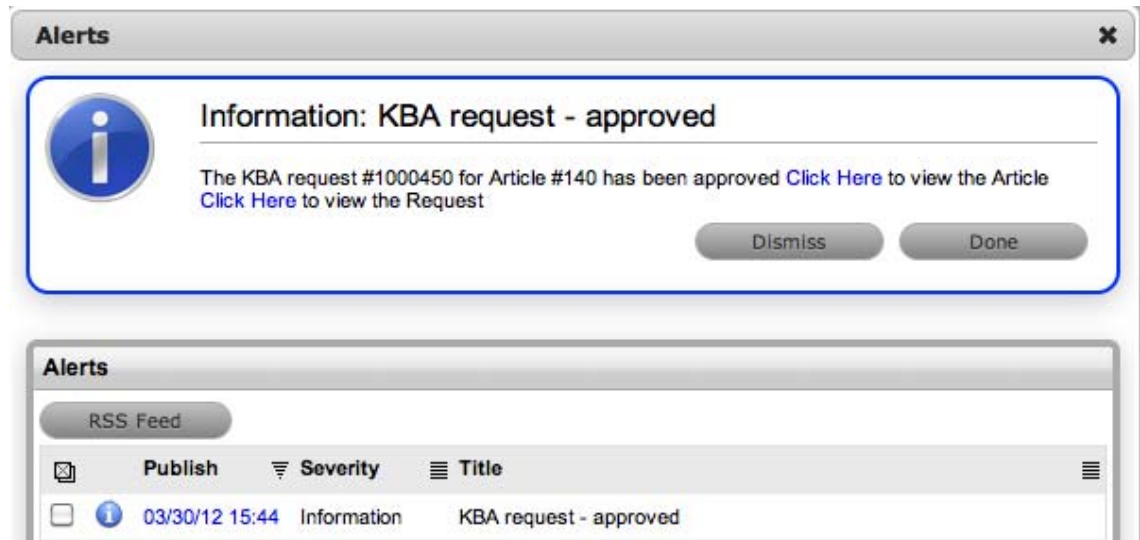
The Accept, Revise and Reject buttons are displayed.



| Status | Description   |
|--------|---|
|        | <p>When selected the new content is approved for publication and the Request is moved to the Accept State.</p> <p>An Alert is sent to the KBA author informing them of the successful publication.</p>  |
|        | <p>When selected, the Request Summary screen displays the Notes field to allow the User to add comments and the Request is moved to the "On Hold - KBA Revise" State. The KBA is returned to the "In Development" State.</p> <p>The KBA author is sent an Alert, notifying them that the KBA requires revision. When the edits have been made and the KBA is returned to the "Pending Publication" Status, the Request is re-activated and set to the Approval State.</p> |
|        | <p>This option is to be selected when it is decided that the KBA Content is not suitable for the KB.</p> <p>The Request moves to the configured Reject State and a Notes field is displayed allowing the User to record the reason for the decision. The KBA returns to the " In Development" State, which allows the author to delete the KBA, if desired.</p> <p>The KBA author is sent an Alert, notifying them that the content has been rejected.</p>                |

8. Select the appropriate Operations button  
A warning message is displayed, select OK. The system will move the Request to the appropriate State defined in the Workflow.
9. Add Note Content, if relevant  
Select Add Note button to save Note Content.
10. Click Done.

An alert is sent to the author of the KBA Article, notifying them if their KBA has been approved, rejected or requires revision. The Alert includes links to the related Article and Request.



---

**NOTE:** If a KBA Approval Request is deleted, the associated content reverts to the In Development status and the relationship between the Request and KBA is removed.

If a KBA is deleted when the associated Request is in the On Hold - KBA Rework system state, the Request moves to the Default Closed State for the assigned Workflow and the relationship between the two elements is deleted.

---

## 1.22 Teams

Technicians are allocated to Teams for the various support processes. For each Process (i.e., Incident, Problem, Change and Service Request) there must be at least one support Team.

Default Teams are assigned to specific Item Types. Support requests generated against an Item Type are then assigned to a Technician within the default support Team for that Process. The Team may be reassigned based on other options provided through the associated SLA(s) and Workflow(s).

Support Teams for Incident and Problem Management include escalation layers, and Technicians are assigned to each of these layers. Incidents and Problems follow the escalation path determined by the service level triggers assigned to the request. For a Technician to be able to edit a request, they must be a member of the assigned Team, although they do not need to be included in an escalation layer.

Service and Change Request Teams are built around the selected Workflow. Technicians are assigned to work groups and each State of the Workflow Lifecycle is associated with a selected work group. When a request moves to a next State, it is assigned to a Technician within the work group associated with that Workflow State. One or multiple levels of escalation can also be configured for the Workflow, which span the lifecycle of the Workflow the Service or Change Team are assigned.

A Service Portfolio Team can be configured in the system, assigning the Users who will manage the development, production and discontinuation of services offered to the organization.

Use this section to:

- ♦ Create new Incident and Problem Teams with escalation layers
- ♦ [Create Service and Change Request Teams with workflow assignments](#)

- ◆ Create a Service Portfolio Team
- ◆ Create a Release and Deployment Team

| Team Name        | Process        | Lead Technician   | OLAs | Incoming Email | Phone | Workflows   | Layers |
|------------------|----------------|-------------------|------|----------------|-------|---|--------|
| Change Team      | Change Request | Raj Candy         |      |                |       | Typical Change Workflow<br>Standard Change Workflow | 2      |
| Development Team | Change Request | Robert Allanby    |      |                |       | Typical Change Workflow                             | 2      |
| Incident Team    | Incident       | Simone Supervisor |      |                |       | Incident Workflow                                   | 2      |
| Problem Team     | Problem        | Edward Norton     |      |                |       | Problem Workflow                                    | 1      |

## 1.22.1 Unknown Team

By default the system includes the system Team, Unknown, within the Teams List. This is the Team used by the application for Incidents created via email. It can be configured to use the system email address or an email account that is an alias for the main system account and Technicians can be assigned like any other Incident Team.

---

**NOTE:** The Unknown Team should *NOT* be re-named and will *NOT* appear in any other Teams lists throughout the application, i.e., when assigning a Team to an Item or Item Type.

---

## 1.22.2 Creating an Incident or Problem Team

To create an Incident or Problem Team:

1. Select User>Teams
2. Click New
3. Enter the Team Name

4. Select Incident or Problem Process
5. Enter the Team email address, if relevant
6. Define the Team options
- 7.

| Options        | Description   |
|----------------|---|
| Team           | Enter the Team Name. (Required.)  |
| Process        | Indicates if the Team is to manage Incidents or Problems.   |
| Team Lead      | The Technician assigned to supervise the Team and its activities. Options are visible when the Technicians have been assigned to the Team.  |
| Incoming Email | Enter a specific Email Address for the Team, which allows Customers to use directly. This address will need to be configured as an alias to the system support address on the Email Server. See: <a href="#">Email Polling &amp; Request Creation</a> . |

| Options                 | Description   |
|-------------------------|---|
| Email Display Name      | If desired, enter a name for the Team that will be used in the From address for email responses sent by members of the Team.  |
| Customer Notification   | Sets the default notification method applied to requests for Customer correspondence, when requests are assigned to this Team.<br><br>The Customer Defined option, derives the method of notification from the setting within the Customer's Profile or Account Information tab.  |
| Technician Notification | Sets the default notification method applied to requests for Technician correspondence, when requests are assigned to this Team.  |
| Live Priority           | Routes requests to Technicians who belong to the Team and logged into the system.   |
| Self Assign             | When enabled, requests created by a Technician will automatically be assigned to that Technician.   |
| Notify on New           | Determines who is informed about the creation of a new request.<br><br><i>Technician</i> - notifies only the Technician assigned to the request.(This is the default setting.)<br><br><i>Layer</i> - notifies all members in Layer One of the Team assigned to the request.<br><br><i>Select Team</i> - notifies all members of the Team. |
| Notify on Update        | Determines who is informed when a request is updated.<br><br><i>Technician</i> - notifies only the Technician assigned to the request.(This is the default setting.)<br><br><i>Layer</i> - notifies all members in Layer One of the Team assigned to the request.<br><br><i>Select Team</i> - notifies all members of the Team.           |
| Notify on Escalate      | Determines who is informed when a request is escalated.<br><br><i>Technician</i> - notifies only the Technician assigned to the request.(This is the default setting.)<br><br><i>Layer</i> - notifies all members in Layer One of the Team assigned to the request.<br><br><i>Select Team</i> - notifies all members of the Team.         |

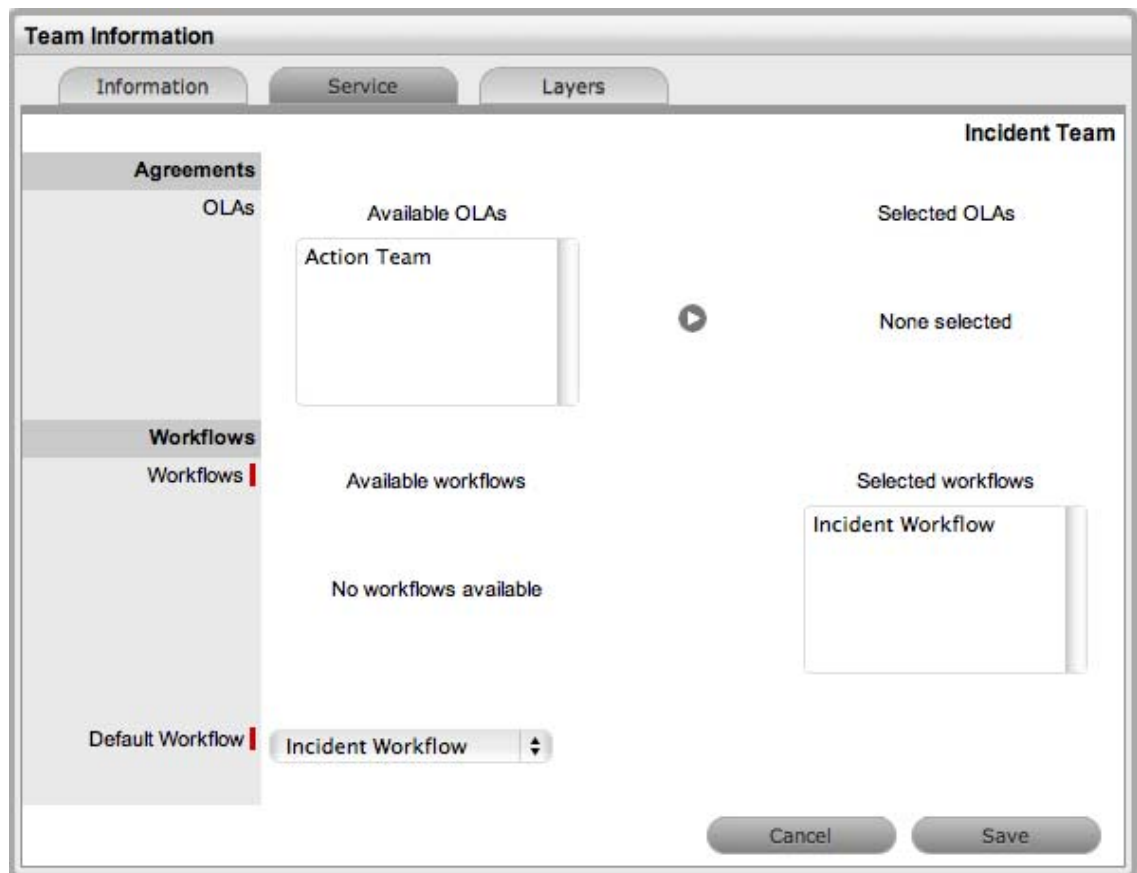


| Options                | Description   |
|------------------------|---|
| Incident/Problem Queue | <p>Allows the Team to use a holding bay for Incidents/ Problems that are received via email or the Customer Portal. (This option is visible if it has been enabled by the Administrator.)</p> <p>If the Team has only one Technician assigned to Layer One of Escalation, new Incidents are automatically assigned to that Technician and that Technician is notified of the new Incident assignment.</p> <p>If the Team has multiple Technicians assigned to Layer One of Escalation, the new Incident is placed in the Queue (i.e., it is assigned to the System User) and all members of the Team are notified that a new Incident has been assigned to the Incident Queue. See: <a href="#">Queues</a>.</p> |
| Queue Visibility       | <p>When the Incident Queue is enabled, the option can be refined to allow the Queue to be available for assigned Workflow entry points, or all stages of the assigned Workflow. If All States is enabled, Users can move requests back to the Queue throughout the request lifecycle. See: <a href="#">Queues</a>.</p>  |
| Edit Assign            | <p>When set to Yes and a request assigned to the System User (i.e., Queue) is opened in Edit Mode, the system will automatically assign the request to the User editing the request if they are in the Escalation Layer associated with the request.</p>  |
| Close Assign           | <p>When set to Yes and a request assigned to the System User (i.e., Queue) is moved to an Exit State of the Workflow, the system will automatically assign the request to the User who prompted the close action.</p>   |

8. Complete the Team Location details, if required
9. Select Technicians from the Available Technicians list
 

Highlight Technician names within the Available Technicians list and click the arrow icon to move the Users to the Selected Technicians list.
10. Click Next
 

The Service Screen displays all Available OLAs and Workflows



11. Assign the relevant OLAs within Available OLAs list (Optional)

Highlight the Team Name and click the arrow icon to move an OLA to Selected OLAs list. Assigning an OLA to the Team ensures the Team's details will be selectable when the assigned OLA is associated with a Workflow State.

12. Assign the relevant Workflows within the Available Workflow list

Highlight the Workflow Name and click the arrow icon to move the Workflow into the Selected Workflows list. Assigning Workflows to the Team ensures the Team is displayed as an option within the request Summary tab when the associated Workflows are assigned to a request.

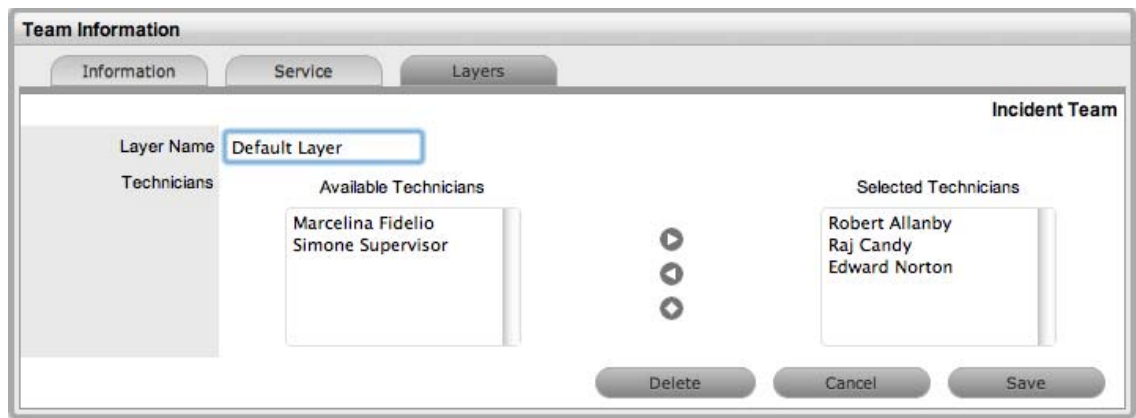
13. If more than one Workflow is assigned, select a Default Workflow from the drop-down list

14. Select Next

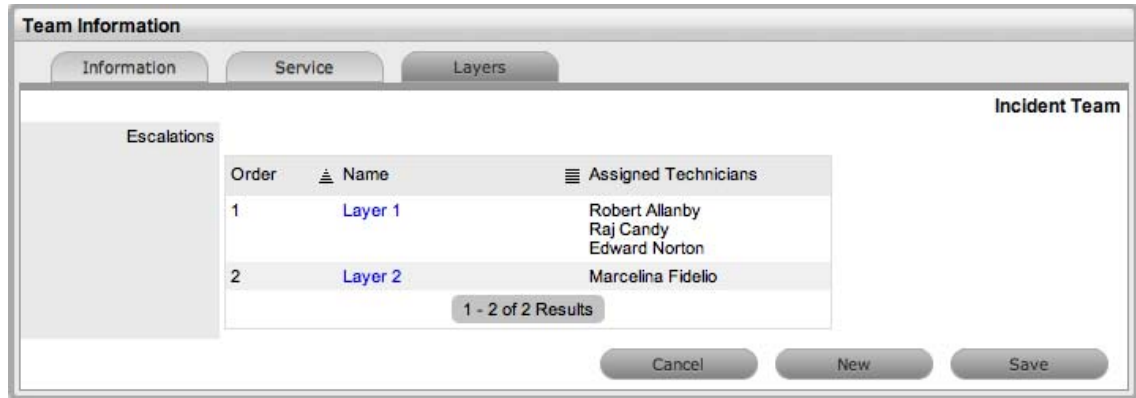
The Escalation screen appears. This allows Escalation Layers and Technician assignment to be configured.

15. To edit the Default Layer, select the link

16. Move Technicians between the Available and Selected boxes and amend the Layer Name, if required



17. Click Save
18. To create additional Escalation Layers, select New  
By default the Team Lead will always be assigned to the Escalation Layer upon creation.
19. Click on the Layer link to edit the Technician assignment and Save



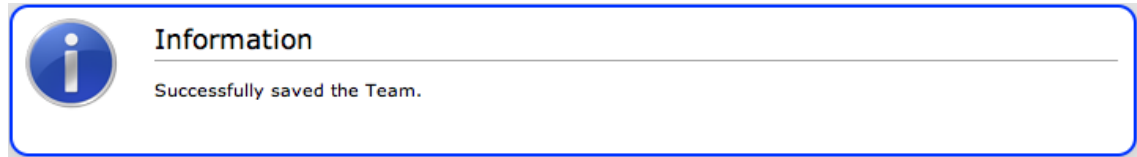
20. To delete a Layer, select the Layer Name
21. Click the Delete button and Save.

### 1.22.3 Creating and Configuring Additional Escalation Layers

Additional escalation levels can be created, if required. The order of the escalation pathway is determined by the order of creation. That is, layer one is entry level support, layer two is the next level of support and so on.

1. Select Team Information>Layers
2. Click Edit to display the New button  
The Technicians who are assigned to the Team are displayed in the Available Technicians list
3. Add and/or remove Technicians from the Escalation Layer Members list

4. Click Save.



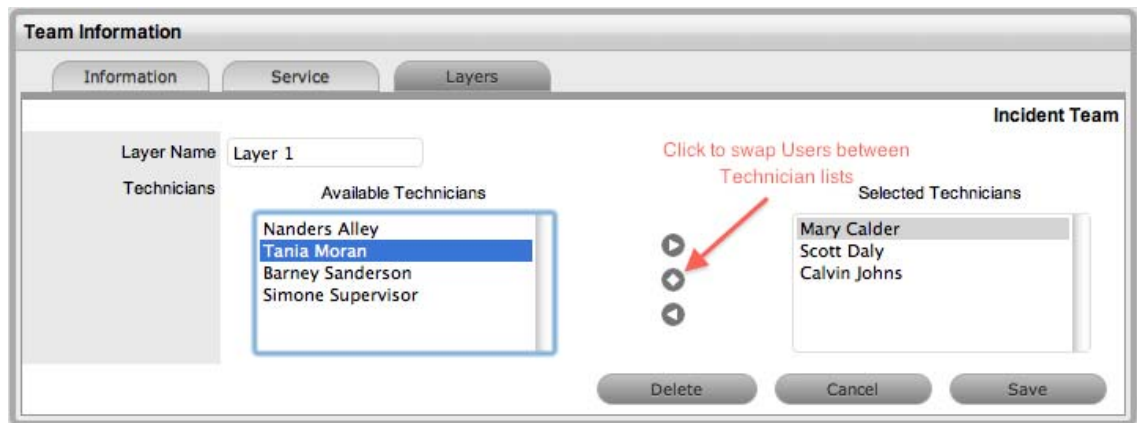
## 1.22.4 Editing an Escalation Layer

To edit an Escalation Layer with the Team Information screen in Edit mode:

1. Select the Layers tab
2. Click on the Layer name hyperlink  
The list of available and assigned Technicians is displayed.

3. Remove and add Technicians, as required

Highlight the User Names within the relevant list and click the arrow to move the User to the required list.



4. Select Save.

## 1.22.5 Configuration of Escalation Layers

The following process is recommended for configuring Escalation Layers. Level one should contain the majority of Available Technicians who have been assigned to the Team. A smaller but more experienced group should be assigned to the second level. An even smaller and more experienced group should be assigned to the third level and so on until the final level of escalation. Ideally, the last layer should contain only the Team's Lead Technician.

There are no constraints to prevent individual Technicians from being assigned to more than one level. However, for a Technician to be able to edit a request they must be a member of the assigned Team, although they do not need to be included in an escalation layer.

To remove a User from a Team:

1. In the User tab, click Users  
The User Information screen appears.
2. Click on the name of the User

3. Select the Team tab
4. Click on Edit
  - The Remove button is displayed.
5. Select the checkbox to the left of the Team Name
  - Multiple check boxes can be selected.
6. Select Remove to delete the User from a Team
  - The User Name is removed from the Team.
7. Click Done.

## 1.23 Service Portfolio Team

The Service Portfolio Team is responsible for overseeing the creation and publication of all service offerings in the Service Portfolio, which include:

- ♦ Services under development
- ♦ Services in production and operation, stored in the [Service Catalog](#)
- ♦ Retired and discontinued services.

### 1.23.1 Working with Service Portfolio Teams

To maintain control of the creation, editing and deletion of Service Items within the CMDB, Service Portfolio Teams can be assigned to Service Category templates. Included within these Teams are Groups of Users who are responsible for managing Item information at the various stages of the Service Lifecycle.

The screenshot shows a configuration form for a Service Category. The 'Category' section includes a 'Name' field with the value 'Service', a checked 'Service Category' checkbox, and a 'Description' field with the text 'The Service category is where users define non-tangible items'. The 'Portfolio Team' is set to 'SPM Team' via a dropdown menu.

When Service Portfolio Teams are configured within the application, the option to assign a Service Portfolio Team is displayed within Service Category templates in the Configuration>Categories tab. This allows for the Groups that are created within the Team, to be assigned to the different Category Lifecycle States included in the Lifecycle Map displayed in the Item Categories>Life Cycle tab.

The screenshot shows a configuration form for a Service Team. The 'Service Team' section includes a 'Group' dropdown menu with the value 'Operations' selected.

Assigning Groups to Category Lifecycle States allows the Users within the Group to edit the details of an Item when it is assigned that stage of the Category Lifecycle.

---

**NOTE:** When creating the Teams, it is suggested that the Group names reflect the stage of the Service Lifecycle, for instance Service Design, Service Implementation, Service Operation, Service Quality Control and Catalog Management.

---

## 1.23.2 Creating a Service Portfolio Team

To create a Service Portfolio Team:

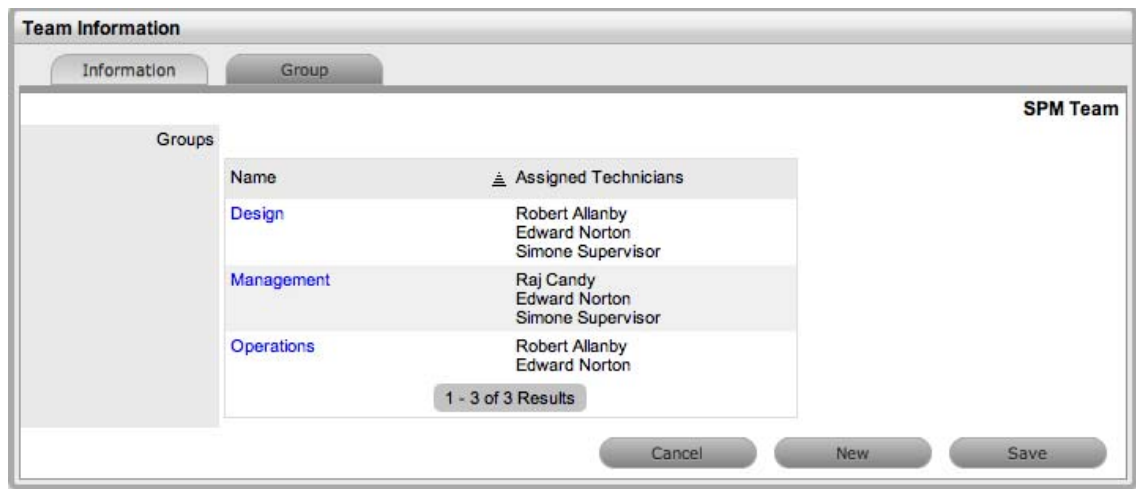
1. Select User>Teams
2. Click New
3. Enter the Team Name
4. Select the Service Portfolio Process

The screenshot shows a 'Team Information' dialog box with the following components:

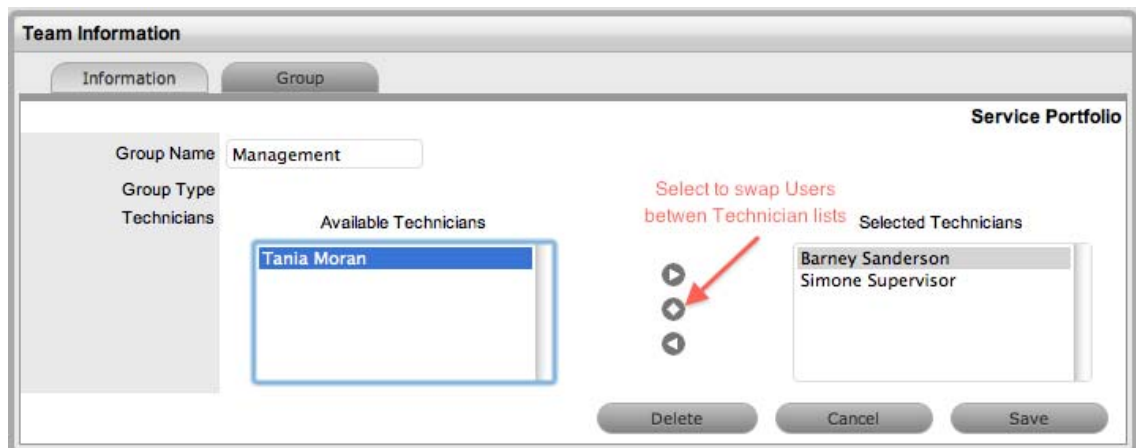
- Information Tab:** Contains a 'Details' section with fields for 'Team Name', 'Process' (dropdown menu), and 'Team Lead' (dropdown menu). The 'Process' dropdown is open, showing options: Service Request, Incident, Problem, Change Request, Release, and Service Portfolio (highlighted).
- Location Section:** Contains input fields for 'Address', 'City', 'State', 'Zip', 'Country' (dropdown menu), and 'Phone'.
- Members Section:** Contains a 'Technicians' list. Below it is an 'Available Technicians' list with names: Edward Norton, Marcelina Fidelio, Raj Candy, Robert Allanby, and Simone Supervisor. To the right is a 'Selected Technicians' list showing 'None selected'.
- Buttons:** 'Cancel' and 'Next' buttons are located at the bottom right.

5. Complete the Team Location details, if required
6. Select Technicians from the Available Technicians list  
Highlight Technician names within the Available Technicians list and click the arrow icon to move the Users to the Selected Technicians list.
7. Set the Team Lead
8. Click Next

The Service Screen moves to the Group tab where the Users are assigned the various Groups that are provided the privilege of managing Item information and lifecycle status as part of managing the Service Portfolio. Some suggested Groups include Service Design, Service Implementation, Service Operation, Service Quality Control and Catalog Management.



9. For each Group link, click to assign Users to the Team
10. Move Technicians between the Available and Selected boxes



11. Select Save
12. Click New, to add other Groups to the Team  
Assign Users as required and Save.
13. Click Done.

### 1.23.3 Removing Team Members from a Group

To remove a User from a Group, with the Team Information screen in Edit mode:

1. Click on the Group Name hyperlink  
The lists of Available and Selected Technicians are displayed.
2. Remove and add Technicians, as required
3. Select Save.

## 1.23.4 Removing a User from a Team

To remove a User from a Team:

1. In the User tab, click Users

The User Information screen appears.

2. Click on the name of the User
3. Select the Team tab
4. Click on Edit

The Remove button is displayed.

5. Select the checkbox to the left of the Team
6. Click Remove.

If the User is not the only person assigned to an escalation layer of the selected Team, the User will be successfully removed from the Team.

## 1.24 Release & Deployment Team

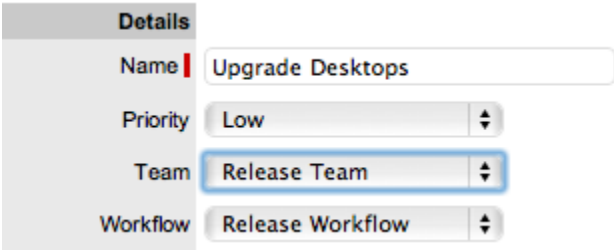
The Release & Deployment Team is responsible for the planning, scheduling and controlling of changes and updates from Test to Live environments.

Release Managers, as part of a Release Team, direct the process using all information presented to help assess release readiness, and to efficiently identify deployment targets for the deployment phases of a release. This level of control guarantees the Release Manager can deliver updates to the live environment successfully, to all relevant parties, on time.

The Deployment component of the Release Team covers the activities or tasks responsible for moving new or changed hardware, software, documentation and process to the Live Environment.

### 1.24.1 Working with Release Management Teams

To plan, schedule and control changes and updates from Test to Live environments, Release Management Teams are assigned to Releases within the Change>Releases tab. Included within these Teams are Groups of Users who are responsible for managing the various stages of the Release Lifecycle.



The screenshot shows a 'Details' panel for a release. The 'Name' field contains 'Upgrade Desktops'. The 'Priority' is set to 'Low'. The 'Team' is set to 'Release Team'. The 'Workflow' is set to 'Release Workflow'.

| Details  |                  |
|----------|------------------|
| Name     | Upgrade Desktops |
| Priority | Low              |
| Team     | Release Team     |
| Workflow | Release Workflow |

When Release Teams are configured within the application, Technicians with the Release and/or Deployment Process are associated with the Team. Managers with the Release Process are assigned to the Approval States of the Release Workflow. Technicians assigned the Release Process can be assigned to States of the Release Workflow, while Technicians only assigned the Deployment Process are placed in the Deployment Group and are responsible for completing the Deployment Tasks created for a Release.



## 1.24.2 Creating a Release & Deployment Team

To create a Release and Deployment Team:

1. Select User>Teams
2. Click New
3. Enter the Team Name
4. Select the Release Process

The screenshot shows the 'Team Information' dialog box with the following sections:

- Information** tab: Includes fields for Team Name, Process (dropdown menu with 'Release' selected), and Team Lead.
- Service** tab: Includes a dropdown menu with options: Service Request, Incident, Problem, Change Request, Release (selected), and Service Portfolio.
- Group** tab: (Empty)
- States** tab: Includes a 'Location' section with fields for Address, City, State, Zip, Country (dropdown), and Phone.
- Members** section: Includes 'Technicians' and 'Managers' sub-sections. Each has an 'Available' list and a 'Selected' list. The 'Available Technicians' list includes Edward Norton, Marcelina Fidelio, Raj Candy, Robert Allanby, and Simone Supervisor. The 'Available Managers' list includes Edward Norton and Simone Supervisor. Both 'Selected' lists are currently empty.

Buttons for 'Cancel' and 'Next' are located at the bottom right of the dialog.

5. Complete the Team Location details, if required
6. Select Technicians from the Available Technicians list

The Technician List consists of Users assigned the Release and/or Deployment Process in their User Information screen.

Highlight Technician names within the Available Technicians list and click the arrow icon to move the Users to the Selected Technicians list.

---

**NOTE:** Technicians with the Release Process will be available for assignment within the Release Workflow States in the Team Information>States tab

Technicians only assigned the Deployment Process will be available for assignment to the Deployment Group, who will complete the Deployment Tasks generated as part of the Release.

---

1. Set the Team Lead

The Team Lead options are drawn from the Assigned Technicians who are assigned the Release Process.

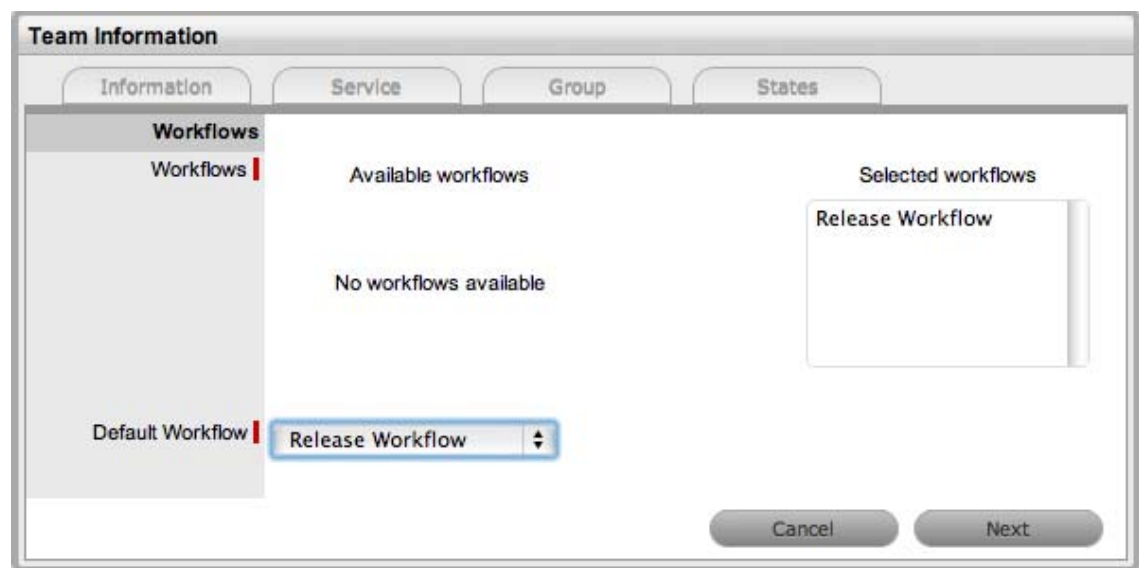
2. Select Managers from the Available Managers list

The Manager List consists of Users assigned the Release Process in their User Information screen.

Highlight Manager names within the Available Managers list and click the arrow icon to move the Users to the Selected Managers list.

3. Click Next

The Information screen moves to the Service tab where the Release Workflows are associated with the Team.



4. Move the relevant Available Workflows to the Selected Workflows field

5. Set the Default Workflow

If a single Workflow is assigned to the Team it is automatically applied as the Default Workflow.

Assigning Workflows to the Team ensures the Team is displayed as an option within the Deployment Summary tab when the associated Workflows are assigned to a Task.

6. Click Next

The screen defaults to the Groups tab that lists the default deployment, manager and release Groups. The Groups automatically apply the Team Lead to the Groups and require additional Technician and User assignments.

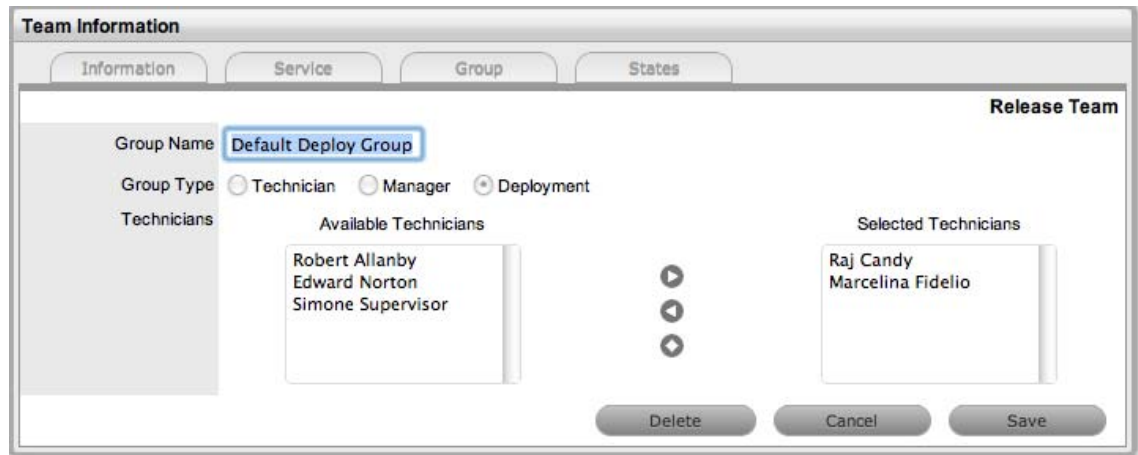
7. Select the Default Deploy Group

The Group Name can be edited and the Available Technicians and Selected Technicians fields are now accessible. As a Deployment Group Type, this group of Users will be available for assignment for Deployment Tasks created as part of a Release Workflow.

8. Rename the Group, if relevant

9. Move the relevant Users between the Available and Selected boxes

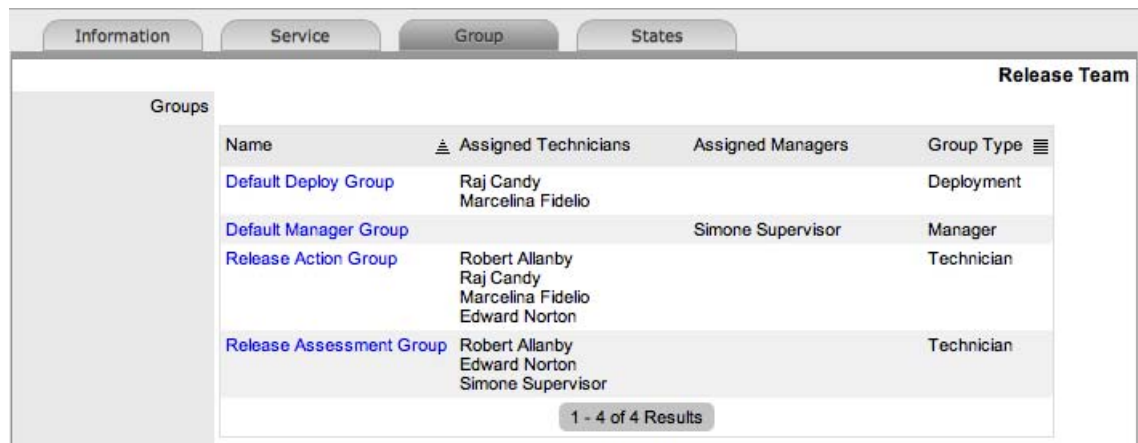
The Users displayed in the Available Technicians list have been assigned the Deployment Process in their User Information screen.



10. Select Save
11. Edit the assigned Users in the Manager and Release Groups

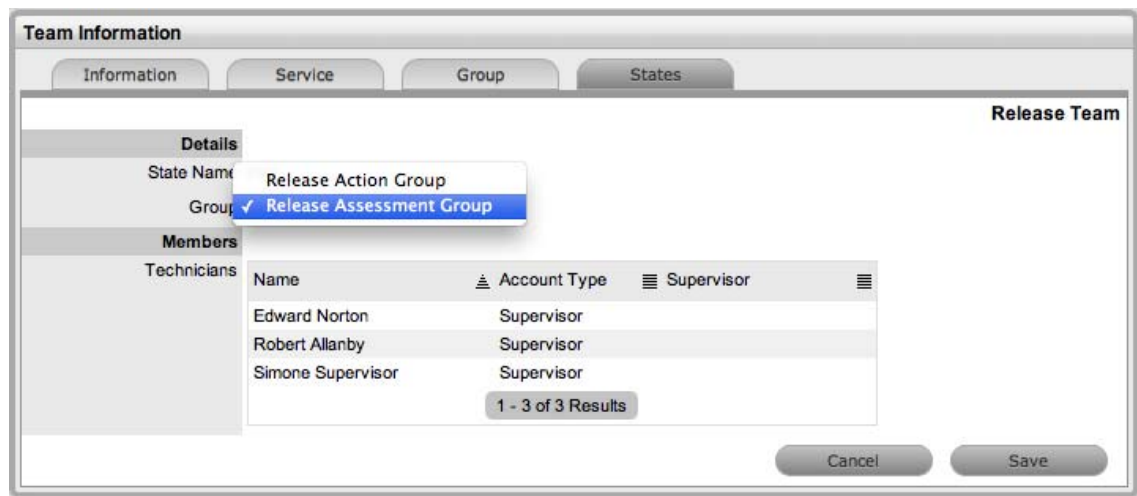
The default Manager Group will be automatically applied to all Approval States of the Release Workflow. The Release Group of Technician Users will be automatically applied to all non-approval States of associated Release Workflows. These assignments can be edited within the States tab.

12. Create additional Manager, Release or Deployment Groups, if relevant



13. Click Next
 

The system moves to the States tab to display the list of Workflows associated with the Team, and the list of States included in the selected Workflow.
14. Select a State link to amend the assigned Work Group
15. Assign the relevant Group of Users to the Workflow State



16. Click Save and continue to adjust all the relevant assignments
17. Click Save
18. Click Done.

The Release & Deployment Team is fully configured.

### 1.24.3 Removing Team Members from a Group

To remove a User from a State or Group, with the tab in Edit mode:

1. Click on the State or Group Name hyperlink to display the list of available and assigned Technicians
2. Remove and add Technicians, as required
3. Select Save.

### 1.24.4 Removing a User from a Team

To remove a User from a Team:

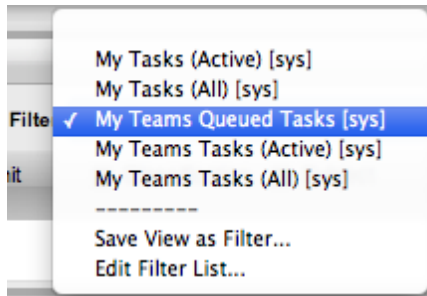
1. In the User tab, click Users  
The User Information screen appears.
2. Click on the name of the User
3. Select the Team tab
4. Click on Edit  
The Remove button is displayed.
5. Select the checkbox to the left of the Team
6. Click Remove.

If the User is not the only person assigned to an escalation layer of the selected Team, the User will be successfully removed from the Team.

## 1.25 Queues for requests

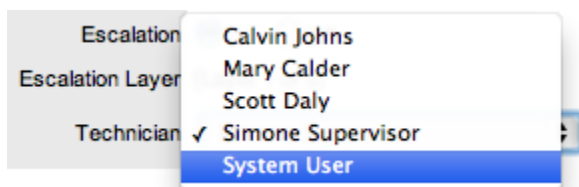
The Queues functionality allows for requests, Incidents, Service Requests or Problems, to be assigned to the System User as part of a Team holding bay. Users within the Team with the Queue option enabled can select relevant requests they decide to work on, or manually assign the System User assigned requests to an appropriate User.

Requests that are assigned to the Queue are allocated to the System User, until they are manually reassigned to a specific User. The unassigned requests are located within the Home tab My Teams Queued Tasks, or the Operations>Incidents tab Filter option called Incident Queue for new Incidents, the Service Requests within the Service Request Queue in the Operations>Service Requests tab and the Operations>Problems tab Filter option called Problem Queue for new Problems .



When the Queue feature is enabled for the application, it can be applied on a Team by Team basis. This means some Teams can be configured to use the business logic of the application for assigning requests to specific Users. While other Teams can use the Queue to select the requests they want to work on, or allows other Users to manually assign the request to a relevant User.

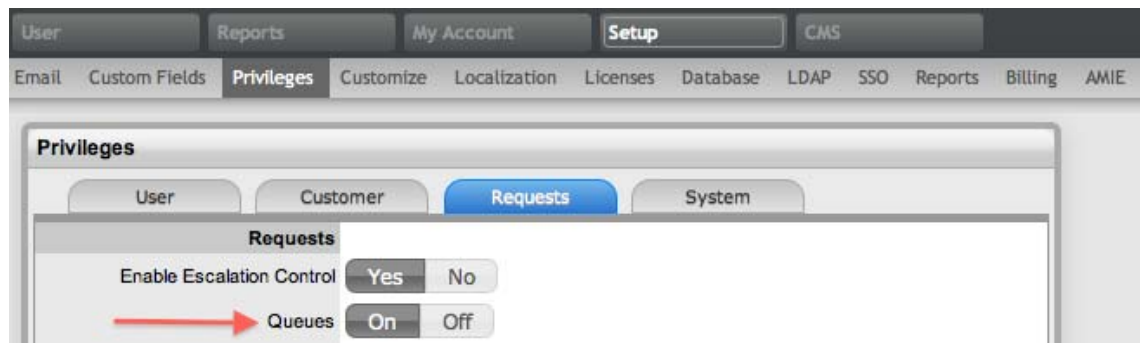
When the Self Assign and Queue options are enabled for a Team and a request is created by a Technician User, the Self Assign option will override the Queue assignment and allocate the request to the User creating the request, if they are in the first layer of escalation. The User can assign the request to the Queue by selecting the System User in the Technician list.



### 1.25.1 Enabling the Queue

By default, the Queue functionality is disabled in the application Setup. To enable the Queue:

1. Log in as an Administrator
2. Select Setup>Privileges
3. Select the Request tab



4. Enable the Queues option
5. Click Save.

To enable the Queue for a Team:

1. Log in as a Supervisor
2. Select the User>Teams option
3. Select the relevant Team link

**Team Information**

Information    Service    Layers

Duplicate

**Incident Team**

**Details**

Team Name | Incident Team

Process | Incident

Team Lead | Simone Supervisor

Incoming Email | incidents@servicesupport.com

Email Display Name | Service Desk

Customer Notification | Email

Technician Notification | Email

Live Priority  On  Off

Self Assign  On  Off

Notify on New  Technician  Layer  Team

Notify on Update  Technician  Layer  Team

Notify on Escalate  Technician  Layer  Team

Incident Queue  On  Off

Queue Visibility  Entry States  All States

Edit Assign  Yes  No

Close Assign  Yes  No

**Location**

Address

City

State

Zip

Country

Phone

**Members**

Technicians | Available Technicians

No Technicians available

Selected Technicians

Mary Calder  
Calvin Johns  
Tania Moran  
Scott Daly  
Simone Supervisor  
Barney Sanderson

Delete    Cancel    Save

4. Click Edit

5. Enable the Queue option

The following options can then be applied to the Queue:

6.

---

| Options                                 | Description   |
|---|---|
| Service Request /Incident/Problem Queue | <p>Allows the Team to use a holding bay for Incidents that are received via email or the Customer Portal. (This option is visible if it has been enabled by the Administrator.)</p> <p>If the Team has only one Technician assigned to Layer One of Escalation, new Incidents are automatically assigned to that Technician and that Technician is notified of the new Incident assignment.</p> <p>If the Team has multiple Technicians assigned to Layer One of Escalation, the new Incident is placed in the Queue (i.e., it is assigned to the System User) and all members of the Team are notified that a new Incident has been assigned to the Incident Queue. See: <a href="#">Queues</a>.</p> |
| Queue Visibility                        | <p>When the Incident Queue is enabled, the option can be refined to allow the Queue to be available for assigned Workflow entry points, or all stages of the assigned Workflow. If All States is enabled, Users can move requests back to the Queue throughout the request lifecycle. See: <a href="#">Queues</a>.</p>  |
| Edit Assign                             | <p>When set to Yes and a request assigned to the System User (i.e., Queue) is opened in Edit Mode, the system will automatically assign the request to the User editing the request if they are in the Escalation Layer associated with the request.</p>  |
| Close Assign                            | <p>When set to Yes and a request assigned to the System User (i.e., Queue) is moved to an Exit State of the Workflow, the system will automatically assign the request to the User who prompted the close action.</p>   |

---

7. Set the Queue Visibility

Select All States if Team members are to be allowed to return a request to the Queue regardless of the assigned Workflow State.

8. Set the Edit Assign option

Select Yes, if a request that is assigned to the System User/Queue is to be automatically assigned to a User in the first layer of escalation who opens the request in Edit mode.

9. Set the Close Assign option

Select Yes, if a request that is assigned to the System User/Queue is to be automatically assigned to the User who initiates an action that results in the request being moved to an Exit State.

10. Select Save.

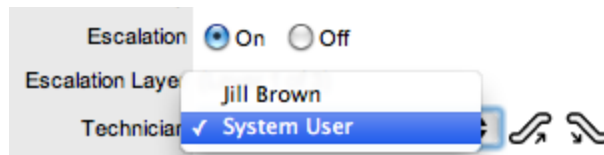


## 1.25.2 Assigning requests from a Queue

All requests displayed within a Queue list are assigned to the System User. To reassign the request to an appropriate User:

1. Select the Request # hyperlink
2. Click Edit
3. Select an appropriate User from the Technician list

The request will now be assigned to the new User and removed from the Queue.



4. Click Save.

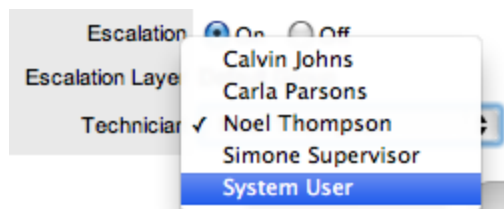
## 1.25.3 Reassign a request to the Queue

When the All States option has been enabled for the Queue within the Team Information screen, the System User will be retained in the Technician drop-down list for the first layer of escalation after it has been assigned to a User. This allows the assigned User to re-assign the request back to the Queue.

To reassign the request to the Queue/System User:

1. Select the Request # hyperlink
2. Click Edit
3. Select System User within the Technician drop-down list

The request will now be assigned to the System User and returned to the Queue.



4. Click Save
5. Click Done.

The system returns to the request list view.

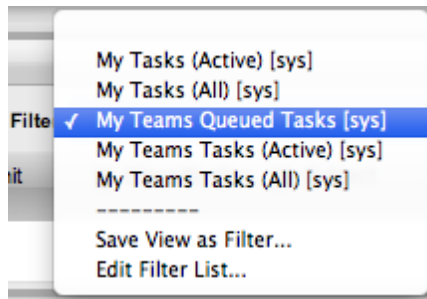
## 1.25.4 Queue Filter

Teams that use the Queue method for request assignment can view and allocate requests using the My Teams Queued Tasks within the Home tab list filter, or within the Service Request, Incidents or Problems tab Queue list filter. They can also see Queued Tasks within the My Teams Tasks filters.

To view all types of requests assigned to the Queue within one list, use the My Teams Queued Tasks within the Home tab:

1. Select the Home tab
2. Go to the Filter List
3. Select the My Teams Queued Tasks option from the drop down list.

The screen will list all of the Service Requests, Incidents and Problems that are currently assigned to the System User.



To view the Queue within the Service Requests tab:

1. Select the Operations>Service Requests tab
2. Go to the Filter List
3. Select the Service Request Queue option from the drop down list.

The screen will list all of the Service Requests that are currently assigned to the System User.

To view the Queue within the Incidents tab:

1. Select the Operations>Incidents tab
2. Go to the Filter List
3. Select the Incident Queue option from the drop down list.

The screen will list all of the Incidents that are currently assigned to the System User.

To view the Queue within the Problems tab:

1. Select the Operations>Problems tab
2. Go to the Filter List
3. Select the Problem Queue option from the drop down list.

The screen will list all of the Problems that are currently assigned to the System User.

## 1.26 Configuration Categories

Within the application the number of Item Categories that can be defined is unlimited. By default the following Categories are included:

- ♦ Audio Visual
- ♦ Documentation
- ♦ Hardware
- ♦ Mobile Devices
- ♦ Network Infrastructure
- ♦ Peripherals
- ♦ Printers & Scanners
- ♦ Software
- ♦ Service.

Within each Category the Lifecycle and Classifications associated with the Category can be defined.



### 1.26.1 Categories Tab

The default templates set at the Category level are used to cover a broad range of Item Types. Within each default Category the following have been configured, but can be customized as required:

- ♦ The Field Labels that will be available on the Details tab of Items using the Category
- ♦ The broadest level of Classifications that are assigned as part of the request creation process.
- ♦ The Lifecycle stages an Item will move through from being proposed or ordered to decommissioned
- ♦ Template responses that Technicians can use when entering a Note for a request that is assigned an Item that uses a Category.

The following table illustrates how Categories can be represented as Manufacturer Models within the Configuration>Types tab:

| Category                  | Proposed Item Type   |
|---------------------------|--|
| Hardware                  | PCs, Servers, Notebooks  |
| Networking Infrastructure | Routers/Switches, UPS, Cabinets, Racks                                 |
| Mobile Devices            | iPhones, PDAs, Windows MDs   |
| Peripherals               | Monitors, External Storage Devices, Docking Stations, Barcode Scanners |
| Audio Visual              | Projectors, Electronic Whiteboards                                     |
| Printers/Scanners         | Printer, Scanner   |
| Digital Cameras           | Digital Still, Digital Video, Thermal Image                            |
| Software                  | Operating Systems, Databases, Applications                             |
| Service                   | Email, Website.  |

The easiest way to create additional Categories, is to duplicate a default Category and tailor it to the organizational requirements.

A Service Portfolio Team can be assigned to the default Service Category by creating the Team within the User>Teams screen, then selecting Edit within the Categories tab of the Service Item Category.

## Creating a Category

1. Select Configuration>Categories

The Item Categories screen appears.

2. Click New



The screenshot shows a software dialog box titled "Item Categories". At the top, there is a tab labeled "Category". Below the tab, the dialog is divided into sections. The first section is labeled "Category" and contains a "Name" field with the text "New Category" and a "Service Category" checkbox which is currently unchecked. Below this is a "Description" field, which is empty. The second section is labeled "Fields" and contains the text "Generated on Save". At the bottom right of the dialog, there are two buttons: "Cancel" and "Save".

3. Enter the name of the new Category
4. Complete the Description

Content entered in this field is visible when the User scrolls over the Category Name in the Item Category list.

5. Click Save

The Item Categories screen expands to display the options to upload an Item Category icon and customize Field labels.

---

**NOTE:** The Item No. Validation option is displayed, if the Admin>Setup>Privileges>System> Edit Item Numbers is set to Yes

This displays the Input Mask and User Mask fields, which are explained in the Categories Fields table below.

---

1. Check the Service Category field if the template is to be used for a Service Item

Ticking this option displays the Portfolio Team drop-down list, if [Service Portfolio Teams](#) have been created within the application. This allows Groups within the Service Portfolio Teams to be assigned to the different stages of the Item Lifecycle, and activates Service Catalog Management functionality within the [Cost Tabs of Types](#) and [Items](#) that use the template.

---

**NOTE:** Customers cannot create Items using Item Categories that have the Service Category option enabled

---

**Item Categories**

Category Lifecycle Classifications Responses Types

Duplicate Sample Category

**Category**

Name

Service Category

Description

Icon

**Fields**

Ordering  Alphabetical  System  User Defined Actions:

| Label                             | Data Type | Style | Active                              | Required |
|-----------------------------------|-----------|-------|-------------------------------------|----------|
| <input type="checkbox"/> Field 1  | String    | Text  | <input checked="" type="checkbox"/> |          |
| <input type="checkbox"/> Field 10 | String    | Text  | <input checked="" type="checkbox"/> |          |
| <input type="checkbox"/> Field 11 | String    | Text  | <input checked="" type="checkbox"/> |          |

1. Select the icon to be replaced, to change the Icon image for the Item Category

This icon is used as the generic visual representation of the Item Category in the Relationship Map. This can also be refined at the Item Type level.

Icon  no file selected

128 x 128 pixels

Use the  to upload a new image or  to cancel the upload.

---

**NOTE:** The dimensions of the uploaded icon must be exactly 128 x 128 pixels

---

2. Customize the Field Labels

Custom fields are visible in the Details tab of Items that use the Category.

Click the Field Label link to open it in Edit mode and display the following options:

3.

---

| Categories Fields | Description  |
|-------------------|--|
| Category          |  |
| Field Label       | The name defines what attribute information is to be recorded in the field.  |
| Active            | Indicates if the field will be visible in the Details tab of an Item.  |
| Required          | Indicates if the field is required or mandatory field.   |
| Customer Visible  | Defines if the Customer can see the field within the Customer Portal.<br><br>If Yes is selected, define if the Customer can edit the field information on the Customer Portal.   |
| Data Type         | Dictates the field's Data Type. The options available include : <ul style="list-style-type: none"><li>◆ String - List or Free Text</li><li>◆ Number</li><li>◆ Boolean - radio buttons for Yes/No and True/False</li><li>◆ Date - creates a date field</li><li>◆ Currency- creates a currency field</li><li>◆ Hyperlink.</li></ul>                                |
| Style             | States the style of the field.<br><br>eg. String- List or Free Text field. See <a href="#">Lists</a> for more information on creating a list field type.   |
| Unique Value      | When active, the system prevents the duplication of data within the customized field.  |
| Default Value     | Value entered is the default system entry for the field, when the field is not completed manually.   |
| Input Validation  | When enabled the Input Mask and User Mask can be defined.<br><br><i>Input Mask</i> : A regular expression to use for data validation of values entered by a User (i.e., Zip/Post Code, telephone no.)<br><br><i>User Mask</i> : A "User Friendly" representation of the Input Mask that Customers can understand should it appear in a validation error message. |

---





| Categories Fields  | Description  |
|--------------------|--|
| Enable Description | When enabled a Description field appears, allowing the User to enter details of what information the field is expected to capture. These details are accessible next to the custom field on the relevant screen. |

- Click Save to complete the field label configuration

Continue to customize all fields as required.

- Define the ordering preference

The option defined here dictates how the fields appear on the Item Details tab.

To move a field, select the checkbox beside the field label followed by the   to move the label up and down the list. To multi-select fields, tick the checkboxes beside the label name and click  to activate or  to deactivate the fields.

The field order can be set to:

- ♦ Alphabetical - the fields will be presented according to the alphabet order of the first letter.
- ♦ System - the fields will appear in the order they are entered into the system.
- ♦ User Defined - the fields can be manually adjusted by the User using the system buttons.

- Click Save.

Modify the Category [Lifecycle](#), [Classifications](#), [Responses](#) and, if the system is synched with more than one asset management discovery tool the [Federated](#) templates, if necessary.

## Duplicating a Category

To fast track the creation of an Item Category, each can be duplicated.

To duplicate an existing Category:

- Select Configuration>Categories
- Tick the box to the left of the Category name



- Click Duplicate

A new Category hyperlink is added to the Category list. The new Category will contain the same custom fields, lifecycle and classifications of the original Item Category.



4. Modify the new Category as required.

## Editing and Configuring an Item Category Template

After an Item Category has been duplicated it can be modified to represent the new Item Category.

To edit a Category:

1. Select Configuration>Categories
2. Click on the appropriate hyperlink
3. Click Edit
4. Enter the name of the new Category
5. Complete the Description

Content entered in this field is visible when the User scrolls over the Category Name in the Item Category list.

6. Click Save

The Item Categories screen expands to display the options to upload an Item Category icon and customize Field labels.

---

**NOTE:** The Item No. Validation option is displayed, if the Admin>Setup>Privileges>System> Edit Item Numbers is set to Yes. This displays the Input Mask and User Mask fields, which are explained in the Categories Fields table at Point 9.

---

1. Check the Service Category field if the template is to be used for a Service Item

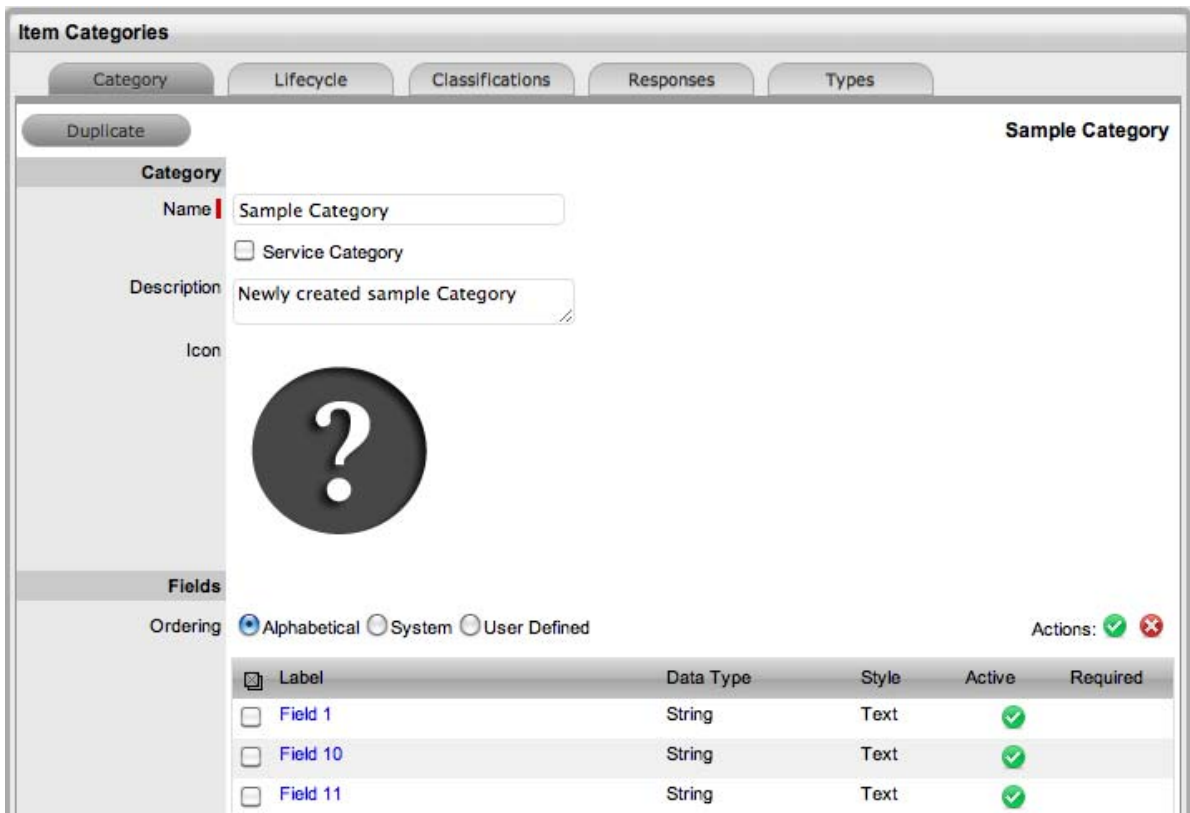
Ticking this option, displays the Portfolio Team drop-down list, if [Service Portfolio Teams](#) have been created within the application. This allows Groups within the Service Portfolio Team to be assigned to the different stages of the Item Lifecycle, and activates Service Catalog Management functionality within the [Cost Tabs of Types](#) and [Items](#) that use the template.

---

**NOTE:** Customers cannot create Items using Item Categories that have the Service Category option enabled

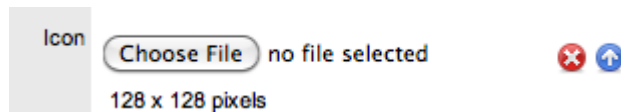
---





1. Select the icon to be replaced, to change the icon image for the Item Category

This icon is used as the generic visual representation of the Item Category in the Relationship Map. This can be refined at the Item Type level.



Use the to upload a new image or to cancel the upload.

---

**NOTE:** The dimensions of the uploaded icon must be exactly 128x128 pixels

Version 7.0 will not apply these icons in the Relationship Map, but they will be used in a future release

---

1. Customize the Field Labels

Custom fields are visible in the Details tab of Items that use the Category.

Click the Field Label link to open it in Edit mode and display the following options:

- 2.

| Categories Fields | Description                       |
|-------------------|-----------------------------------|
| Category          |                                   |
| Field Label       | The name of the field.            |
| Active            | Indicates if the field is active. |





| Categories Fields  | Description  |
|--------------------|--|
| Required           | Indicates if the field is required or mandatory field.   |
| Customer Visible   | <p>Defines if the Customer can see the field within the Customer Portal.</p> <p>For a Service Category, if it is relevant to display costs or other specific details regarding a Service on offer in the Services Tab of the Customer Portal, then set relevant attribute fields to being Customer Visible.</p>  |
| Data Type          | <p>Dictates the field's Data Type. The options available include :</p> <ul style="list-style-type: none"> <li>◆ String - List or Free Text</li> <li>◆ Number</li> <li>◆ Boolean - radio buttons for Yes/No and True/False</li> <li>◆ Date - creates a date field</li> <li>◆ Currency- creates a currency field</li> <li>◆ Hyperlink.</li> </ul>                        |
| Style              | <p>States the style of the field.</p> <p>eg. String- List or Free Text field. See <a href="#">Lists</a> for more information on creating a list field type.</p>  |
| Unique Value       | When active, the system prevents the duplication of data within the customized field.  |
| Default Value      | Value entered is the default system entry for the field, when the field is not completed manually.   |
| Input Validation   | <p>When enabled the Input Mask and User Mask can be defined.</p> <p><i>Input Mask</i> : A regular expression to use for data validation of values entered by a User (i.e., Zip/Post Code, telephone no.)</p> <p><i>User Mask</i>: A "User Friendly" representation of the Input Mask that Customers can understand should it appear in a validation error message.</p> |
| Enable Description | When enabled a Description field appears, allowing the User to enter details of what information is the field is expected to capture. These details are accessible next to the custom field on the relevant screen.  |

3. Click Save to complete the field label configuration

Continue to customize all fields as required.

4. Define the ordering preference

The option defined here dictates how the fields appear on the Item Details tab.

To move a field, select the checkbox beside the field label followed by the   to move the label up and down the list. To multi-select fields, tick the checkboxes beside the label name and click  to activate or  to deactivate the fields.

The field order can be set to:

- ◆ Alphabetical - the fields will be presented according to the alphabet order of the first letter.
- ◆ System - the fields will appear in the order they are entered into the system.
- ◆ User Defined - the fields can be manually adjusted by the User using the system buttons.

5. Click Save.

Modify the Category [Lifecycle](#), [Classifications](#), [Responses](#) and, if the system is synched with more than one asset management discovery tool, the [Federated](#) templates, if necessary.

## 1.27 Service Item Costs Tab

The Costs Tab of a Service Item includes information related to the financial and contractual details associated with the Item. The information more specifically related to the Service Item is recorded in the Charges and Revenue fields, as this information allows service and support organizations to calculate the costs of offering a service and if appropriate, recover the costs from the relevant parties.

As with other Item Types, the screen includes general Item details such as:

- ◆ Base cost
- ◆ Purchase date and related information
- ◆ Depreciation data
- ◆ SLA and Contract details.

The Information recorded on the Costs Tab includes:

| Financial       | Description   |
|-----------------|---|
| Cost            | The financial investment made to purchase the Item. This figure is also used when the Delegate Costs is enabled for allocating costs across related Items.<br><br><b>NOTE:</b> Typically for Service Items, the infrastructure costs would be zero as this would be derived from the associated Parent Items. |
| Monthly Cost    | The amount invested on a monthly basis to maintain the running of an Item. This figure is also used when the Delegate Costs option is enabled for allocating costs across related Items.  |
| Usage Unit Cost | This is used as a reference field, where the User can enter base unit cost, for example per Megabyte data charge, which can be used for calculating costs in custom reports.  |
| Purchase Date   | The date the Item was purchased.  |
| Depreciate Over | Enter the number of years the Item is to be depreciated over, if required.  |

| <b>Financial</b>  | <b>Description</b>  |
|-------------------|---|
| Depreciated Value | The system calculates the current value of the Item based on the Purchase Date and the number of years the Item is to be Depreciated Over.  |
| Audit Date        | Set the date the Item is next to be audited.  |
| PO Number         | If Purchase Orders are enabled for the system, the field is visible and automatically populated with the PO number generated by a User within the Finance>Purchase Orders tab, when the Item order was recorded in the system.          |
| Charges           |   |
| Price (per user)  | Draws the figure from the <a href="#">Service Item Type Costs tab</a> and displays this as a daily amount. This figure is then multiplied with the number of Users/Customers assigned to the Item, to calculate the forecasted Revenue. |
| Cost (per user)   | Draws the figure from the Inherited Costs and displays this as a daily amount. This figure is then multiplied with the number of Users/Customers assigned to the Item, to calculate the actual Costs.                                   |
| Revenue           |   |
| Month to Date     | Uses the Charges Price figure, multiplied by the number of Users and days of month passed, to calculate the month to date figure.   |
| Previous Month    | A reference figure for an average monthly revenue figure, based on the previous month's revenue for the Service Item.   |
| Costs             |   |
| Month to Date     | Uses the Charges Cost figure, multiplied by the number of Users and days of month passed, to calculate the month to date Cost.  |
| Previous Month    | A reference figure for an average monthly cost, based on the previous month's cost for the Service Item.  |
| Inherited Costs   |   |
| Inherited Capital | Total infrastructure costs of parent CI's that directly contribute to the cost of the Service Item. This figure is derived from all the Cost fields within the Item Information>Costs tab of related Parent Items.                      |
| Inherited Ongoing | Running costs of all associated Items that enable the Service Item to continue to function. This figure is derived from all the Monthly Cost fields within the Item Information>Costs tab of related Parent Items.                      |

| Financial        | Description  |
|------------------|--|
| Delegate Costs   | <p>To enable cost delegation across the relationship map allowing associated Items to inherit the costs of the current CI, select Yes. This will take the figures from the Cost and Monthly Cost fields for the Item and apply them across related Child Items.</p> <p>Define the technique to be used to evaluate the cost split:</p> <p><i>Child Count:</i> Costs are split by percentage based on the number of child CI's the costs are being delegated across.</p> <p><i>User Count:</i> Costs are split proportionally based on the number of users of the child CI's the costs are being delegated across.</p> <p><i>Custom %:</i> The relationship itself allows for the % cost to be assigned</p> |
| Availability     |  |
| Avg Repair Time  | <p>Entries displayed here are automatically calculated based on the average length of time an Item is offline.</p>   |
| Avg Time To Fail | <p>Figures displayed here are automatically calculated based on the average time between an Item being moved to an offline State.</p>  |

The figures displayed within the Availability fields are automatically calculated by the application, using the Item Lifecycle as it moves between online and offline States.

**Item Information**

Information   Details   **Costs**   Requests   Relationships

Edit   Duplicate   Print   **Item # 100002 (Service Desk)**

| Financial             |   | SLA Details      |                          |
|-----------------------|---|------------------|--------------------------|
| Cost                  | \$0.00  | Service Level    |                          |
| Monthly Cost          | \$0.00  |                  |                          |
| Usage Unit Cost       |   |                  |                          |
| Purchase Date         |   |                  |                          |
| Depreciate Over       | years   |                  |                          |
| Depreciated Value     | \$0.00  |                  |                          |
| Audit Date (mm/dd/yy) |   |                  |                          |
| PO Number             |   |                  |                          |
| Charges               |   | Availability     |                          |
| Price (per user)      | N/A   | Avg Repair Time  | N/A                      |
| Cost (per user)       | N/A   | Avg Time To Fail | 44 Days, 22 Hrs, 24 Mins |
| Revenue               |   |                  |                          |
| Month to Date         | N/A   |                  |                          |
| Previous Month        | N/A   |                  |                          |
| Costs                 |   |                  |                          |
| Month to Date         | N/A   |                  |                          |
| Previous Month        | N/A   |                  |                          |
| Inherited Costs       |   |                  |                          |
| Inherited Capital     | \$12,000.00   |                  |                          |
| Inherited Ongoing     | \$150.00  |                  |                          |
| Delegate Costs        | <input type="radio"/> Yes <input checked="" type="radio"/> No |                  |                          |

Done

Completing the Depreciate Over field allows the application to automatically keep track of the Item depreciation over the specified number of years. The current value of the Item after depreciation is displayed at Depreciated Value. The Audit Date field is used to record the date when the Item was last audited.

### 1.27.1 Billing Enabled

When Billing is enabled, a Service Level hyperlink is available within the Costs screen. This provides access to the Service Level Agreement details that govern the lifecycle for Requests logged against the Item.

**Item Information**

Information   Details   **Costs**   Requests   Relationships

Duplicate   Print   **Item # 100002 (Service Desk)**

**Financial**

Cost 0.00

Monthly Cost 0.00

Usage Unit Cost

Purchase Date

Depreciate Over years

Depreciated Value \$0.00

Audit Date (mm/dd/yy)

PO Number

**Contract**

Service Level **Gold**

Contract # 7

Start Date 05/09/11

End Date 05/08/12

Expires 11 Months 21 Days

**Availability**

Avg Repair Time N/A

Avg Time To Fail 44 Days, 22 Hrs, 24 Mins

**Charges**

Price (per user) N/A

Cost (per user) N/A

**Revenue**

Month to Date N/A

Previous Month N/A

**Costs**

Month to Date N/A

Previous Month N/A

**Inherited Costs**

Inherited Capital \$12,000.00

Inherited Ongoing \$150.00

Delegate Costs  Yes  No

**Contracts**

| Contract # | Type     | SLA  | Start Date     | End Date       |
|------------|----------|------|----------------|----------------|
| 7          | Per Item | Gold | 05/09/11 00:00 | 05/08/12 23:59 |

1 - 1 of 1 Results

Delete   Cancel   Save

If Invoices are also enabled, an Invoice Number hyperlink is available and when selected, will display the invoice details for the Contract that covers the Item. The Start Date and End Dates stipulate the contract length covered for the Item. It is summarized by the days or hours recorded in the Expires field.

The Contract tab within the Item Information Costs tab summarizes the contract details that cover the Item. Further Contract details can be found within the relevant Contract Number within the Finance>Invoices screen.

## 1.27.2 Create a Contract

Through the Item Costs tab, Contracts with an associated Invoice Number (if relevant) can be generated for an Item, after it has been logged in the system.

To add a Contract to an Item, within the Configuration>Item screen:

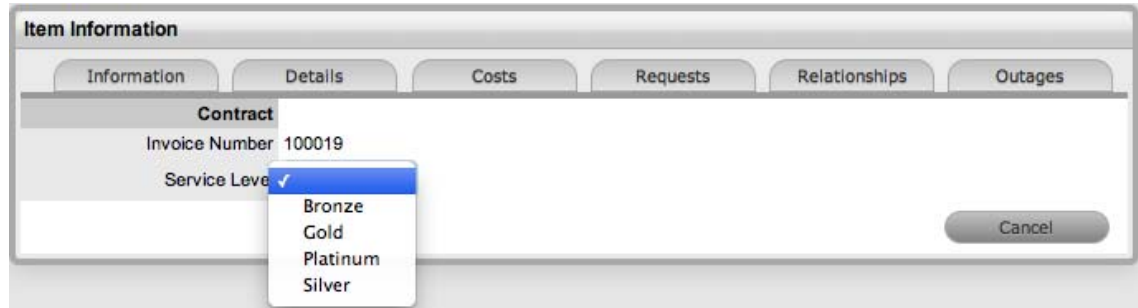
1. Select the Item Number
2. Move to the Costs tab
3. Click Edit

The Add and Delete button are made available within the Contracts tab



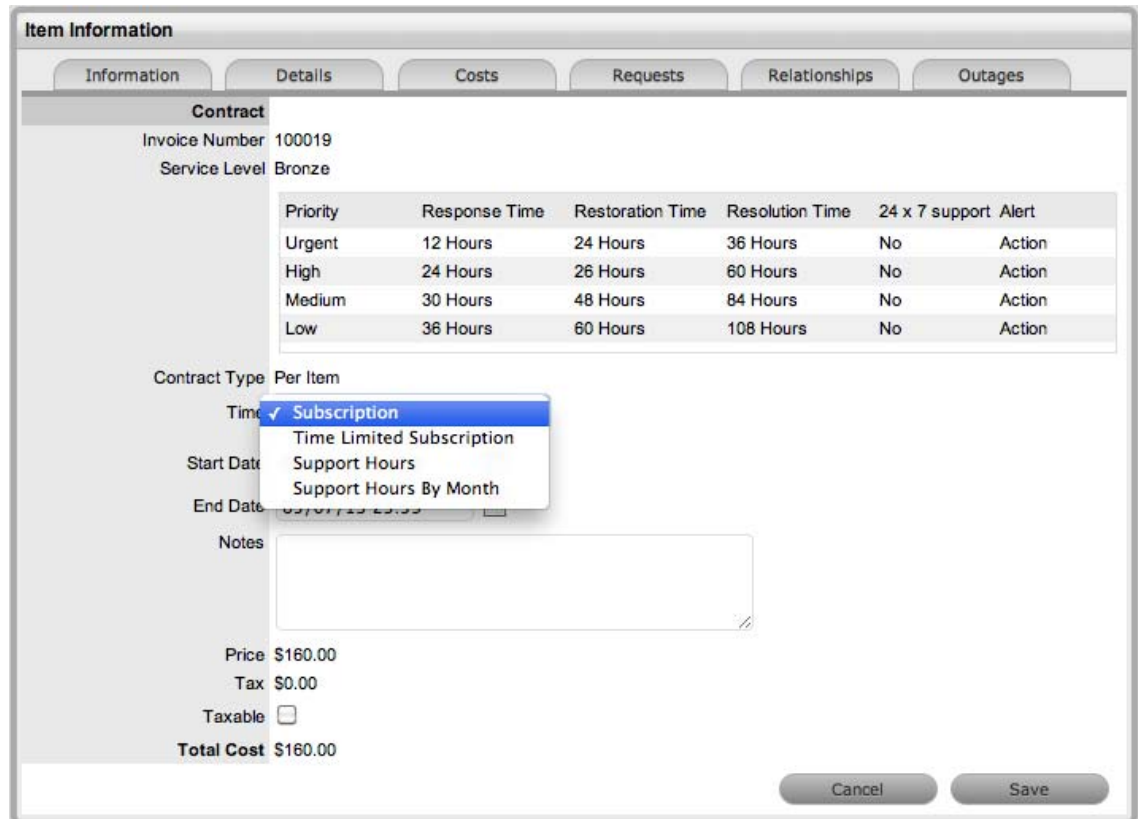
4. Click Add

(If Invoices are enabled in the system, an Invoice number will be automatically generated and assigned to the Contract).



5. Select an SLA from the drop-down option

The screen will display the SLA details and the Contract Type locked to Per Item.



6. Assign the Time period to be covered by the Contract



If *Subscription* is selected, the Start and End Dates are automatically completed by the system, but can be edited if required.

If *Time Limited Subscription* is selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually, entering the length of time for the subscription period.

If *Support Hours* is selected, the number of support hours purchased by the Customers should be entered.

If *Support Hours by Month* is selected, set the number of hours purchased per month and define which day of the month contract is to rollover to start the new month. The Total Support Hours will automatically be calculated based on the Start and End Dates set for the Contract.

(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned. See [Pending Contracts](#).)

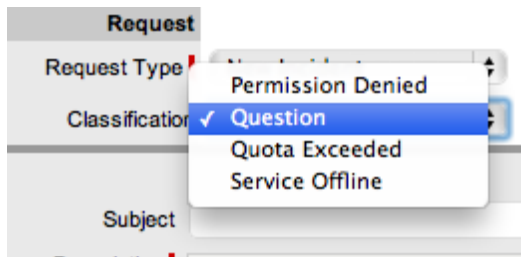
- ◆ Subscription - a contract that covers a specified period of time
- ◆ Time Limited Subscription - a contract that covers either a specified period of time or number of support hours, whichever limit is reached first
- ◆ Support Hours - a contract that defines the number of support hours covered.

7. Add any relevant Invoice Notes
8. Check the Taxable box, if the Contract is to be taxed
9. Click Save.

(If Invoices are enabled in the system, an Invoice number will be automatically recorded for the Contract and made available within Finance>Invoices.)

## 1.28 Creating Custom Field Lists

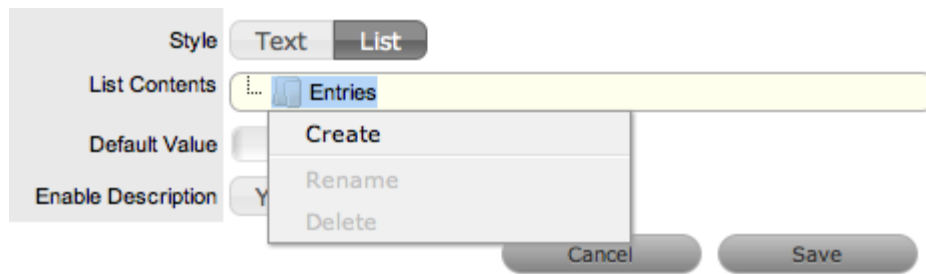
Lists can be created as a data type option within custom fields across the application. They can be created for Item Category and Item Type custom fields, Classifications for requests and system-wide custom fields activated by an Administrator. Lists allow a User to create a series of entries for a custom field that will appear as a drop-down option list.



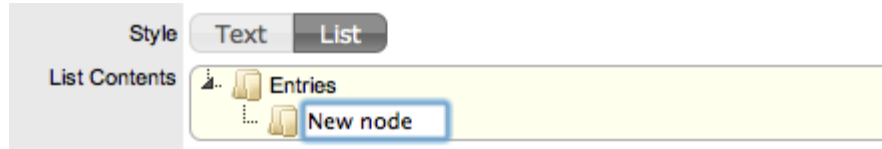
### 1.28.1 Creating a New List Entry

To create a new list entry within the List Contents field:

1. Right click the Entries link  
The Create option is displayed



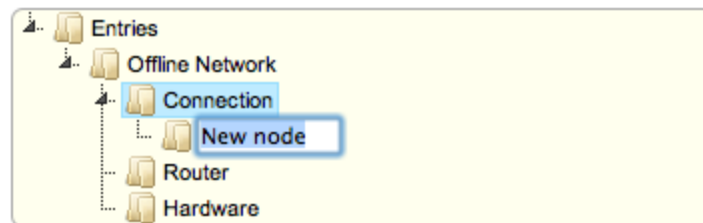
2. Click Create  
A New node link displayed



3. Enter the name of the field
4. Click outside the field to save the entry



5. Repeat this process until all list entries have been added  
To create a nested list, right click on the relevant list entry and repeat the above process.



6. To move an existing entry to a new position, select the entry, then drag and drop the entry into its new location



7. When all the relevant details have been defined for the custom field, click Save.



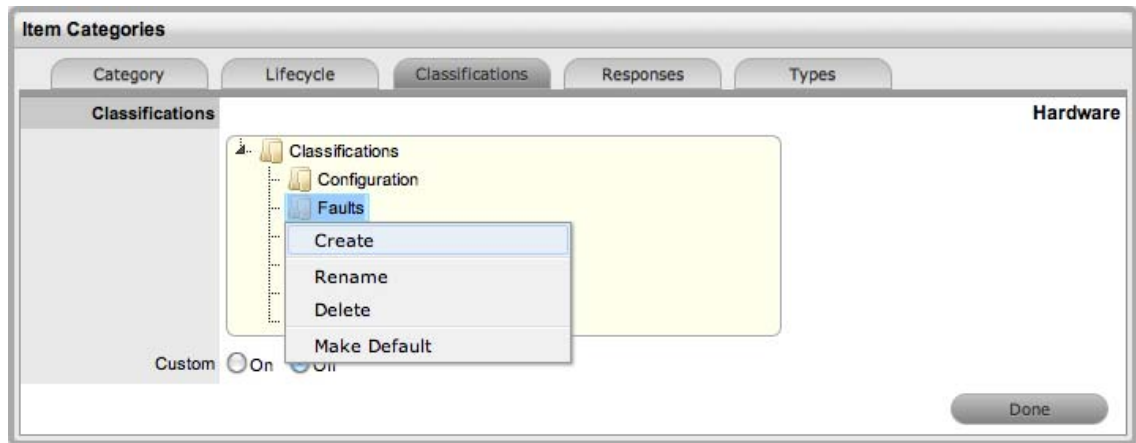
## 1.28.2 Creating Nested List Entries

List entries can be expanded to include nested options.

To create a nested list:

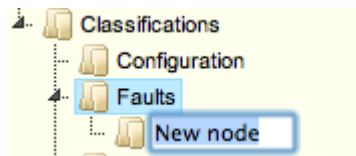
1. Right-click the relevant list entry header

The Create, Rename, Delete and Make Default options are displayed.



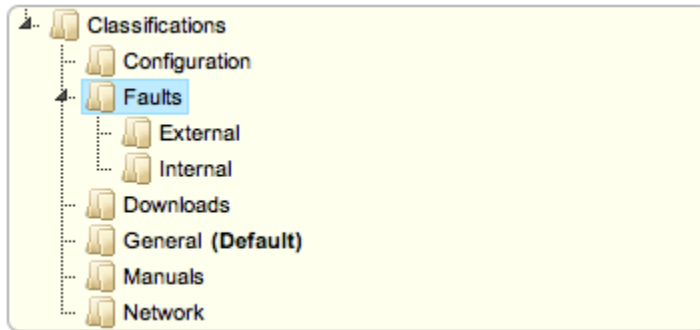
2. Select Create

A text box will appear under the list entry.



3. Enter the name for the list entry
4. Click away from the text box to commit and save the change
5. Move an existing list entry to a new position, if required  
Select the entry, then drag and drop the entry into its new location

6. The above steps can be repeated until the nested list is complete.

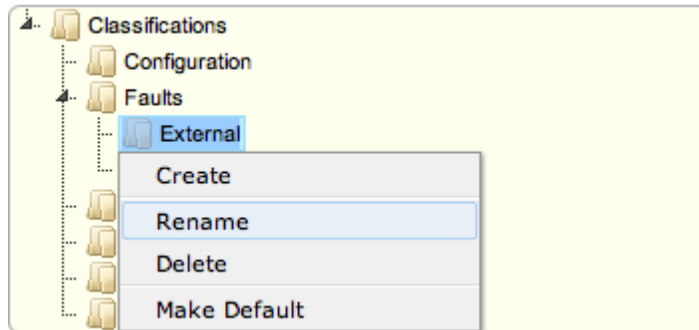


### 1.28.3 Renaming a List Entry

Any list entry can be renamed.

To rename a list entry:

1. Right-click the list entry link



2. Click Rename
3. Edit the field content
4. Click away from the text field to save the change.

### 1.28.4 Deleting a List Entry

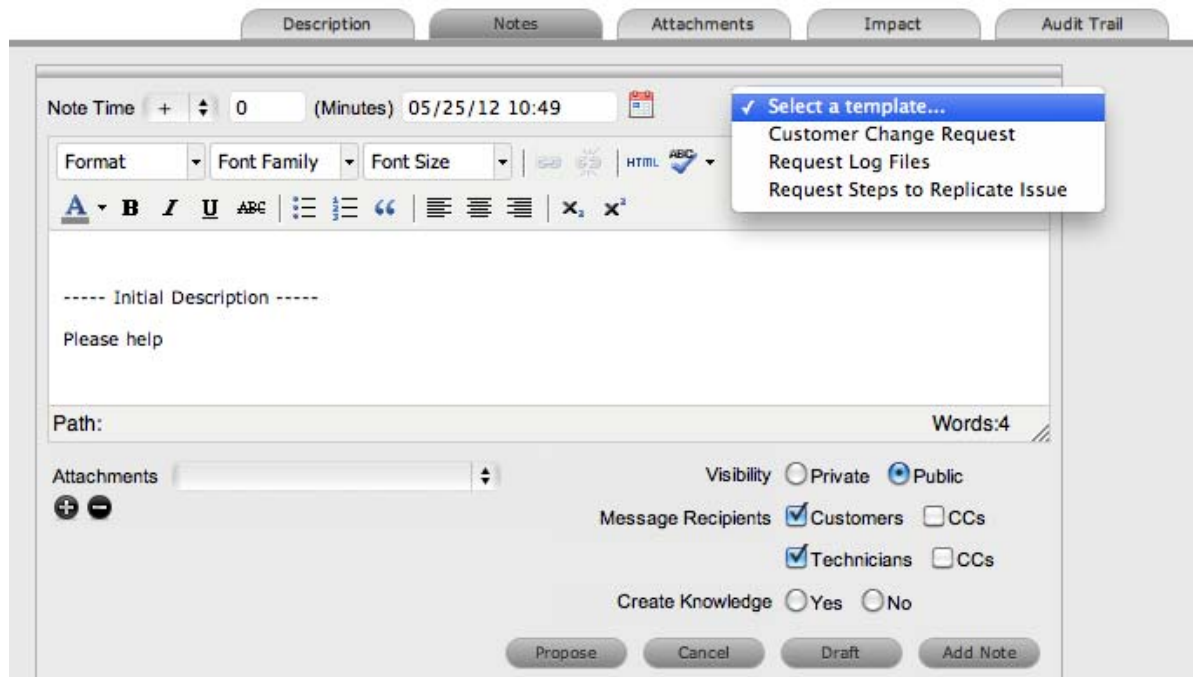
To delete a list entry:

1. Right-click the relevant list entry
2. Click Delete
3. Click Done when the list is complete.

## 1.29 Responses Templates

The Responses tab within an Item Category allows the Supervisor to define template replies for Notes sent related to requests received against the Item Category. This ensures the service desk responds to issues in a consistent manner, and in line with the support organization's policies and protocol. Additional templates can be configured within the Item Type>Responses tab. These templates are only available for requests related to the Item Type.

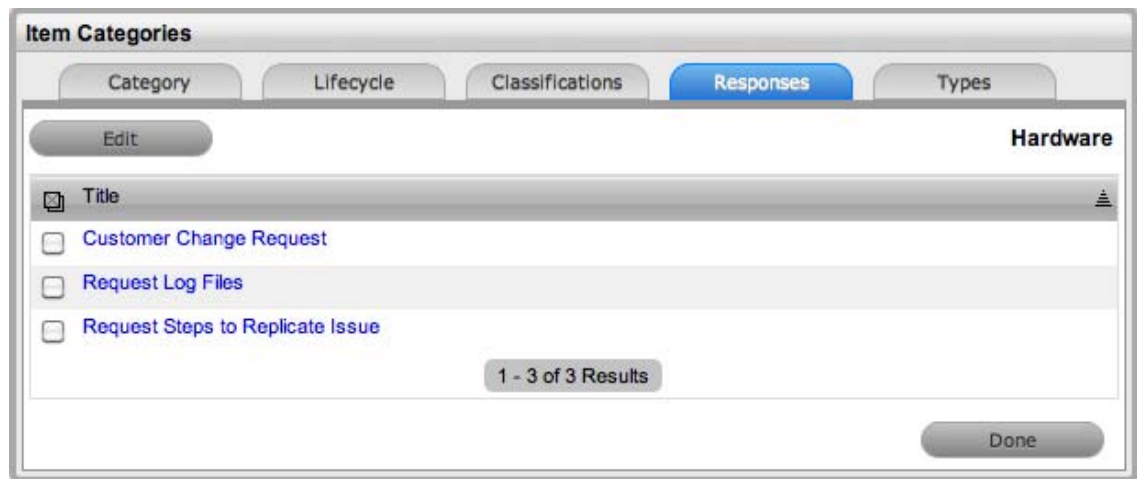
The following screen displays a list of default template options available within the Notes tab of a request:



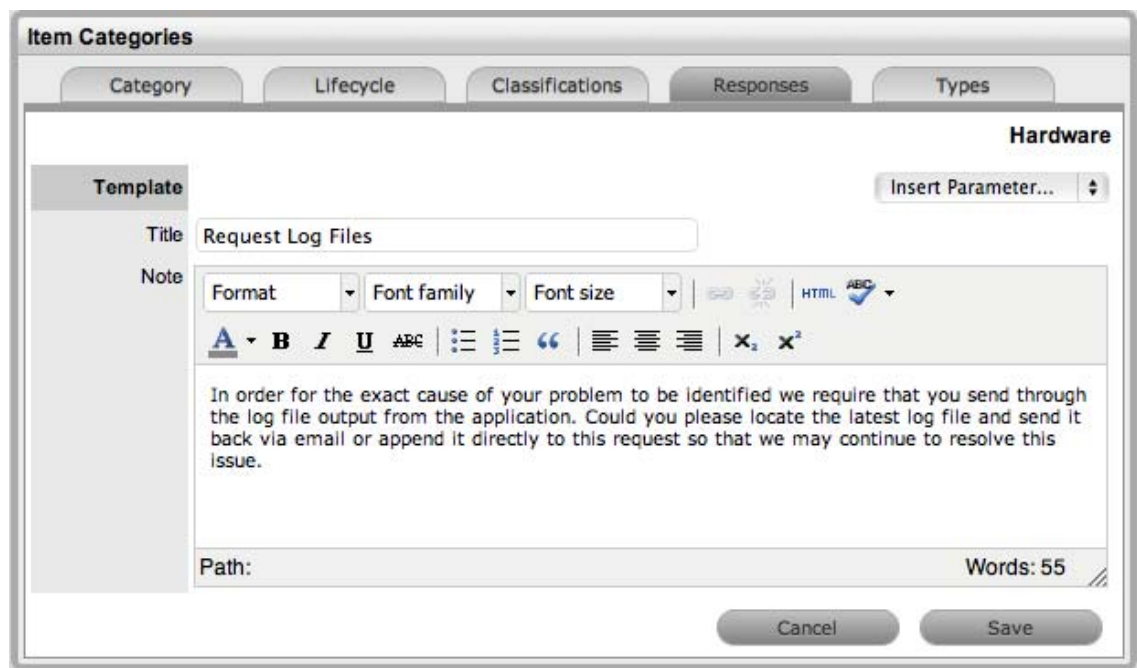
### 1.29.1 Editing a Template

To edit a Response template:

1. Go to Configuration>Categories
2. Select the hyperlink for the relevant Category



3. Move to the Responses tab
4. Click Edit
5. Select the relevant Title hyperlink  
The template contents are displayed.



6. Amend the Note template and insert any relevant parameters
7. Click Save.

## 1.29.2 Adding a Template

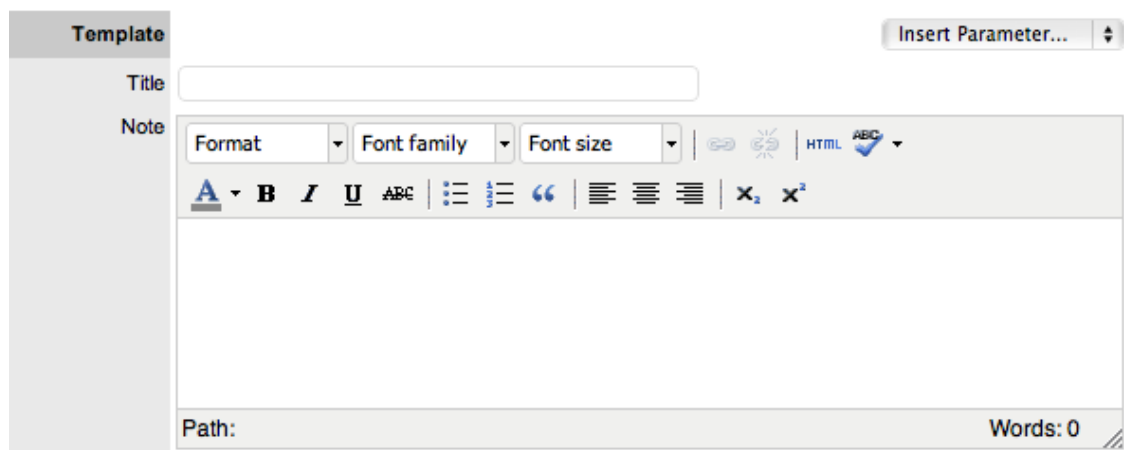
To add a Note template:

1. Go to Configuration>Categories
2. Select the hyperlink for the relevant Category

3. Move to the Responses tab
4. Click Edit



5. Click the Add button
6. Enter the template Title



7. Complete the content for the Note and Save.

### 1.29.3 Deleting a Template

To delete a template:

1. Go to Configuration>Categories
2. Select the hyperlink for the relevant Category
3. Move to the Responses tab
4. Click Edit



5. Check the box in the column next to the template Title
6. Click the Remove button.

## 1.30 Federation Tab

(This tab is only visible when two or more asset management tools are synched within AMIE as configured in Admin>Setup> AMIE tab.)

The Federation tab is used to build the Category Map, which allows for information sourced from multiple asset management systems for a single asset to be recorded against one Item in the CMDB. Based on the map built here, fields within the Item Details tab are populated when [AMIE snapshots](#) are applied to new or updated Items.

### 1.30.1 Creating a Category Map

Within the relevant Category:

1. Go to the Federation tab
2. Click Edit

The system will open each field to display the asset management tools that are configured within AMIE, in the Admin>Setup>AMIE tab.

3. Assign the asset tool source from the pop-up options for each field

The Item Number, Item Type and Manufacturer are included for Categories.

---

**NOTE:** Defining a source for the Item Type and Manufacturer is mandatory

---

4. Complete one or two of the Snapshot Merge fields

The Snapshot Merge fields are used by the system to verify the identity of an Item across the asset management tools configured in AMIE, when synchronizing Item Details from multiple sources.



5. Click Done.

**Item Categories**

Category Lifecycle Classifications Responses Types Federation

**Hardware**

**Details**

Item Number ZENworks Configuration Management v11

Item Status Spiceworks v4.0 (Spiceworks)

Item GUID ZENworks Configuration Management v11

**Item Type**

Type Spiceworks v4.0 (Spiceworks)

Manufacturer Spiceworks v4.0 (Spiceworks)

**Relationship**

Configuration ZENworks Configuration Management v11

**Fields**

CPU ZENworks Configuration Management v11

## 1.31 AMIE Snapshots

(The AMIE submenu option is only visible when two or more asset management tools are configured to be synched within AMIE as defined in Admin>Setup> AMIE>Setup tab.)

The AMIE Snapshot submenu is also known as the staging area for building a federated CMDB, which is a CMDB that uses information sourced from multiple asset management repositories.

When the application is synchronized with multiple asset management tools and the automatic Item creation option is disabled in Admin>Setup>AMIE Import, the system creates an image or Snapshot of the asset information which is made available within the AMIE Snapshot tab. As different asset management tools may not record the same information for an Item, the Supervisor can combine the most relevant information from the different sources into the one Item within the CMDB, by merging snapshots created by the different tools using the Category Map configured for the Item Category. (See: [Federation Tab](#).)

**AMIE Snapshots**

Create Merge Hide Search

Filter: Unassigned Hardware [sys] Display: 10

| Id | Server                            | Source     | Item Type               | User Owner      | Manufacturer | Updated        | Item Number | Platform String         | MAC Address       | Network Address | Network Name    |
|----|-----------------------------------|------------|-------------------------|-----------------|--------------|----------------|-------------|-------------------------|-------------------|-----------------|-----------------|
| 30 | ZENworks Configuration Management | ZENworks   | DM051                   |                 | Dell         | 05/25/11 21:48 |             | Windows XP Professional | 001372B0932B      | 10.0.1.173      | kalaesh-pc      |
| 29 | ZENworks Configuration Management | ZENworks   | VMware Virtual Platform |                 | VMware, Inc. | 05/25/11 21:48 |             | Windows Server 2003 R2  | 000C29EF70F3      | 10.0.1.166      | zen-server      |
| 4  | Spiceworks                        | Spiceworks | VMware Virtual Platform | Darren Williams | VMware       | 05/25/11 21:31 |             |                         | 00:0C:29:D5:3D:58 | 192.168.133.133 | livetime-ns0vfu |
| 3  | Spiceworks                        | Spiceworks | Unknown Hardware        |                 | VMware       | 05/25/11 21:31 |             |                         | 00:50:56:EF:8B:E8 | 192.168.133.2   | 192.168.133.2   |

### 1.31.1 Item creation in the CMDB

When Item information is recorded in multiple AMIE Snapshots, the Supervisor can merge images into one Item within the CMDB by first conducting a search on key fields such as MAC Address or Network Name for Hardware, or Version Number and Parent Id for Software Items. To maintain

relationship data between the Hardware and Software Items (i.e., Parent/Child relationships), the order of Item creation is important. Always create parents first, then children, or in other words, Hardware first then the Software.

After identifying and selecting the relevant Snapshots, by ticking the fields next to the Id#, click the Merge button to display a synthesized Snapshot Detail screen. The information displayed on the Snapshot Detail, and recorded against the Item, is based on the Category Map configured for the Item Category.

If the Control CMS via RFC is enabled in Admin>Setup>Privileges>System, merged or promoted Snapshots are not automatically created as Items in the CMDB, but generate a Change Request that will require approval before the Item is saved in the CMDB. If the option is disabled, when the Save button is selected, the Item is automatically created in the CMDB.

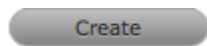
All AMIE Snapshots applied to an Item are removed from the AMIE Snapshot List View, when the list filter is set to display Unassigned Snapshots.

## 1.31.2 Merging Snapshots



Use the Merge button when multiple Snapshots of an Item are to be stored against a single Item record in the CMDB. Select the related Snapshots by checking the relevant boxes next to the Id Number, and click the Merge button.

## 1.31.3 Creating Items from Snapshots



Use the Create button to convert a single Snapshot into an Item record in the CMDB. If the Item already exists in the CMDB, the pre-existing details will be updated. If it is a new Item, a new Item record will be created. To promote a single Snapshot into an Item in the CMDB, check the box next to the Id Number, and click the Promote button.

## 1.31.4 Searching AMIE Snapshots



The search button within the Configuration>AMIE Snapshot screen allows the User to find related AMIE Snapshots using any Item attribute, including the fields created within Item Category templates.

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### Search Parameter Options

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Global Options

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## Search Parameter Options

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|                  |  |
|------------------|--|
| Snapshot Status  | <p><i>All</i> : searches assigned and unassigned AMIE Snapshots.</p> <p><i>Unassigned</i> : searches AMIE Snapshots that are not assigned to an Item.</p> <p><i>Assigned</i> : searches AMIE Snapshots that have been assigned to an Item, and therefore not displayed in the List View.</p> <p><i>Hidden</i> : searches through deleted AMIE Snapshots that have never been applied to an Item.</p> |
| Server           | Select a single server option to refine the search, or leave blank to search through all systems configured in AMIE.   |
| Manufacturer     | Enter Manufacturer details of the Item. This field supports partial text search.   |
| Owner Options    |  |
| Username         | Often the last logged in User for the Item. This field supports partial text search.   |
| Org Unit         | The Org. Unit owner for the Item. This field supports partial text search.   |
| Type Options     |  |
| Item Category    | Select a Category from the popup list to restrict AMIE Snapshots by the Item Category. A selection will display the custom fields for the chosen Category, which can be completed to refine the search.  |
| Item Type        | The Item Type of the Item. This field supports partial text search.  |
| Parent Options   |  |
| AMIE Snapshot Id | Search on a parent AMIE Snapshot Id. This information is useful when merging children Items, such as Software.   |

---

### 1.31.5 Deleting Snapshots

Delete

To ensure that a Snapshot is ignored in future AMIE imports, click the Delete button after checking the field next to the relevant Snapshot Id Number.

### 1.31.6 Enabling deleted Snapshots

Enable

If a search is conducted on deleted or hidden Snapshots, an Enable button becomes available and allows the User to re-enable a hidden Snapshot.

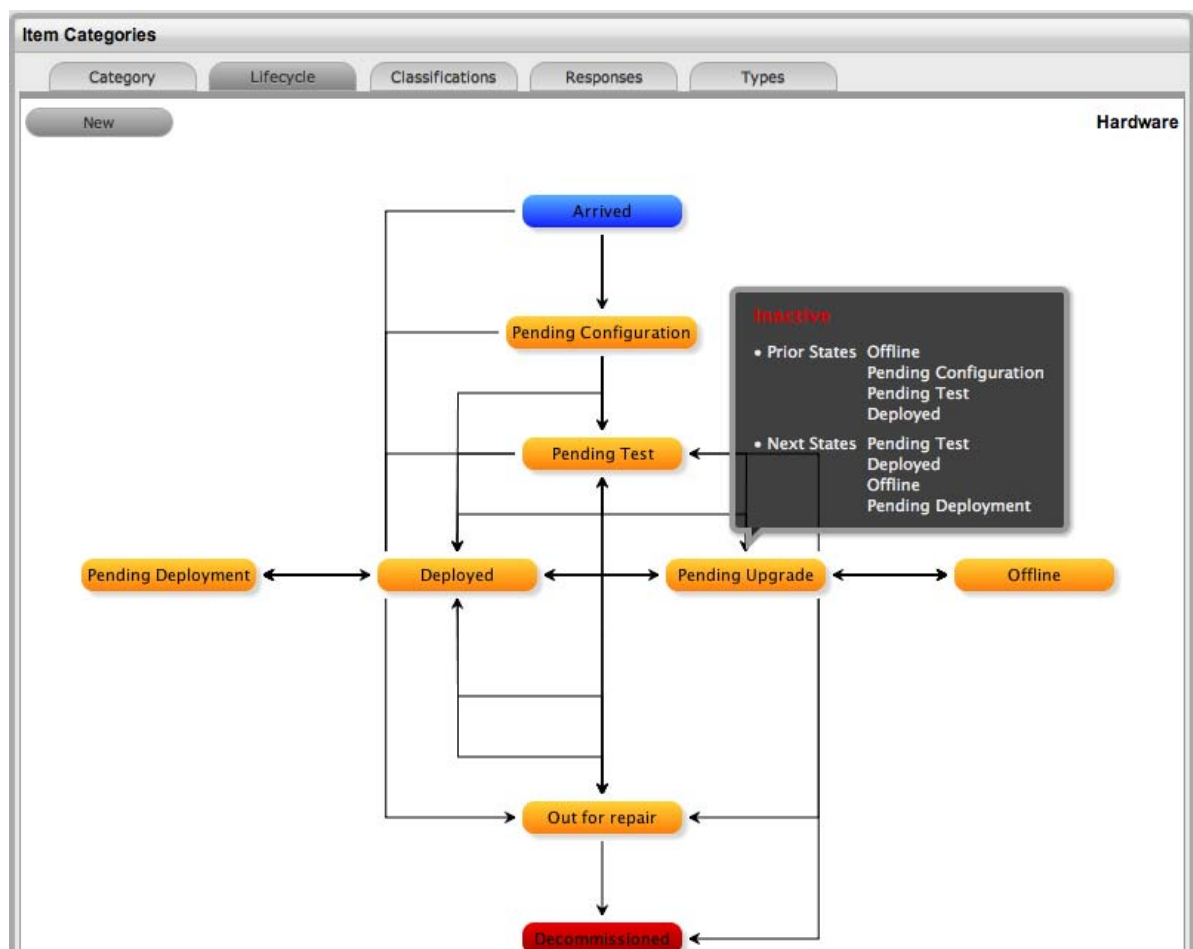
## 1.32 Category Lifecycle

The Lifecycle details the stages of life for a Configuration Item. This allows Items to be tracked from the conceptualization/purchase stage through to being decommissioned/discarded, and can be used to indicate availability levels throughout the Lifecycle.

The States configured here are used within the Item information screen and allow the User to easily see if an Item is at a start or end point of its life, whilst also indicating if the Item is available or not. If an Item is moved to an Offline state, this information is also used on the Outage pages, for easy reference.

By default, the system is installed with some pre-defined Lifecycles, which are displayed with the three types of States:- Previous, Current and Next. Based on the configuration of the Current State, the listings displayed in the Previous or Next column show where an Item can move to from the Current State.

If the default Lifecycles do not match the requirements of the service and support organization, they can be customized. To avoid confusion, it is suggested that the default Lifecycle States be erased completely if they are not relevant to your organization.



## 1.32.1 Creating a Lifecycle

**NOTE:** It is recommended that all Lifecycle States be written down and mapped before this process is started.

1. Select Configuration>Categories
2. Click on the Item Category hyperlink
3. Move to the Lifecycle tab
4. Click the Current State hyperlink to edit the State, or, click New to create a new transitional State  
The States/Status screen appears.

The screenshot shows the 'Item Categories' configuration window with the 'Lifecycle' tab selected. The window title is 'Item Categories' and the category is 'Hardware'. The configuration is for a state named 'Pending Configuration'. The 'Status' section includes: Name (Pending Configuration), Active State (No), Offline State (No), Customer Visible (No), Exit Point (unchecked), and Listener Class (empty). The 'Previous States' section shows 'Available states' (Deployed, Pending Test, Pending Deployment, Pending Upgrade, Out for repair, Offline) and 'Selected states' (Arrived). The 'Next States' section shows 'Available states' (Offline, Decommissioned) and 'Selected states' (Deployed, Pending Test, Pending Deployment, Pending Upgrade, Out for repair). Buttons for 'Delete', 'Cancel', and 'Save' are at the bottom.

5. Rename the State as required
6. Complete the State configuration:
- 7.

| Description |
|-------------|
| Status      |

|                      | <b>Description</b>   |
|----------------------|--|
| Name                 | Enter the name of the Lifecycle State.   |
| Active State         | Stipulates if the Item is Active, when assigned this State.  |
| Offline State        | Only visible when Active is set to No. Indicates if the Item is offline and inactive. Items moved into states where this is enabled, have availability metrics calculated.   |
| Customer Visible     | When selected, Items in this State are visible in the Customer Portal  |
| Pre-production State | Only visible for Service Category lifecycle states. Items that use this state are available within the Service Pipeline filter view of the Configuration>Items tab.  |
| Entry Point          | <p>An Entry Point is used to indicate the start of a Lifecycle. To make the state a Workflow Entry Point, select the Entry Point checkbox.</p> <p>As the Entry Point is the first state, the Previous States field will be removed.</p>  |
| Exit Point           | Select whether the state will be an Exit Point. An Exit Point is used to indicate the end of a Lifecycle.  |
| Listener Class       | <p>This field is visible if the Outbound Webservices option is enabled in the Admin&gt;Setup&gt;Privileges&gt;System tab.</p> <p>Complete this field, if assigning an Item to this State is to trigger an event in an external system.</p> <p>This field should contain the name of a Java class that implements the interface <code>com.livetime.ws.listen.LifecycleListener</code> that has been compiled into a jar file and added to the LiveTime classpath. Please contact support for further details.</p> |

---

**NOTE:** It is advised Users enter the list of all States, before defining any relationships to Previous or Next States

---

1. To return to the Lifecycle Current State list, save the updated State information
2. Continue editing, adding or deleting States until all relevant transitional States exist within the Lifecycle
 

After each Lifecycle State has been configured, the Lifecycle itself should be mapped.
3. Select a Current State hyperlink to configure the Previous State or Next State options,

Using all Available States entered in the Lifecycle, define the status direction options of an Item that uses this Item Category template.

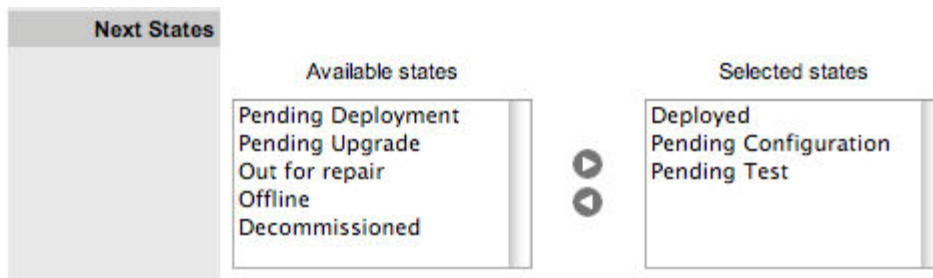
4.

|                  | Description   |
|------------------|---|
| Status           |   |
| Previous States  | If the State is not an Entry Point, use the arrow button to select Previous States from the Available States. |
| Next States      | If the State is not an Exit Point, use the arrow button to select the Next States.                            |
| Available States | Lists all the possible States that can be included in the Lifecycle.  |
| Selected States  | Lists the states that have been included as a Next or Previous State of the Lifecycle.                        |

**NOTE:** When a State is used as a Previous or Next State, it allows an Item to move forward and backward in a Lifecycle

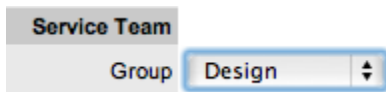
An Entry Point State cannot have any previous States and an Exit Point State cannot have any Next States.

1. Highlight the relevant States in the Available States box
2. Click the arrow pointing towards the Selected States box



3. When all States have been allocated, click Save
4. Save the assignment, and complete the process for all stages of the Item Lifecycle
5. Customise settings if editing a Service Category

Assign a Group within the associated Service Portfolio Team, this will allow these Users to edit the Item details when assigned this stage of the Category Lifecycle



6. Click Save.

Move to the Classifications tab, to define request Classifications for the Item.

## 1.32.2 Deleting a State

It may be necessary to delete a system default State or a State that is no longer in use. Note that a State cannot be deleted if it has been assigned to an Item.

To delete an unused State:

1. Select Configuration>Categories
2. Click on the Item Category hyperlink
3. Move to the Lifecycle tab
4. Select the Current State link
5. Click Delete.

### Item Lifecycle Example

In this example the Item Category Hardware has a Lifecycle State of Arrived. This State is inactive and an entry point. Items assigned this State would not be visible on the Customer Portal.

After this State is assigned to an Item, the next State that the Item can move to is any of the States listed within the Selected States list (i.e., Deployed, Pending Configuration, Pending Test, Pending Deployment or Out for Repair).

Setting up the Lifecycle Status "Arrived"

**Item Categories**

Category Lifecycle Classifications Responses Types

**Hardware**

**Status**

Name

Active State  Yes  No

Offline State  Yes  No

Customer Visible  Yes  No

Exit Point

Listener Class

**Previous States**

Lifecycle entry points do not have 'previous' states

**Next States**

Available states

- Pending Upgrade
- Offline
- Decommissioned

Selected states

- Deployed
- Pending Configuration
- Pending Test
- Pending Deployment
- Out for repair

Cancel Save



### 1.32.3 Assigning the Lifecycle Status of Arrived to an Item with the Category Hardware

**NOTE:** The Item Status list contains all the States defined as Next States for the Arrived Status.

The screenshot displays the 'Item Information' window for Item # 100010 (Macbook Pro). The window is divided into several tabs: Information, Details, Costs, Requests, and Relationships. The 'Information' tab is active, showing fields for Number (100010), Category (Hardware), and Type (Macbook Pro). Below these are dropdown menus for Request Team, Incident Team, Problem Team, and Change Team, all set to 'Request Team', 'Incident Team', 'Problem Team', and 'Change Team' respectively. The Status dropdown menu is open, showing options: Arrived (selected), Deployed, Out for repair, Pending Configuration, Pending Deployment, and Pending Test. Other fields include Criticality, Service Level, Ownership, Customers, Org. Units, and Affects (1 Users). On the right side, there are search fields for 'Find Item Type (Name)', 'Find Customer (Last Name)', and 'Find Org. Unit (Name)'. At the bottom, there are buttons for Duplicate, Print, Delete, Cancel, and Save.

## 1.33 Category Classifications

A list of Classifications used to define issues are created within this tab and used as the generic Classification for requests logged against Items that apply the Item Type Category being configured. The Classifications are also used by the system for proactive Incident analysis and Problem groups.

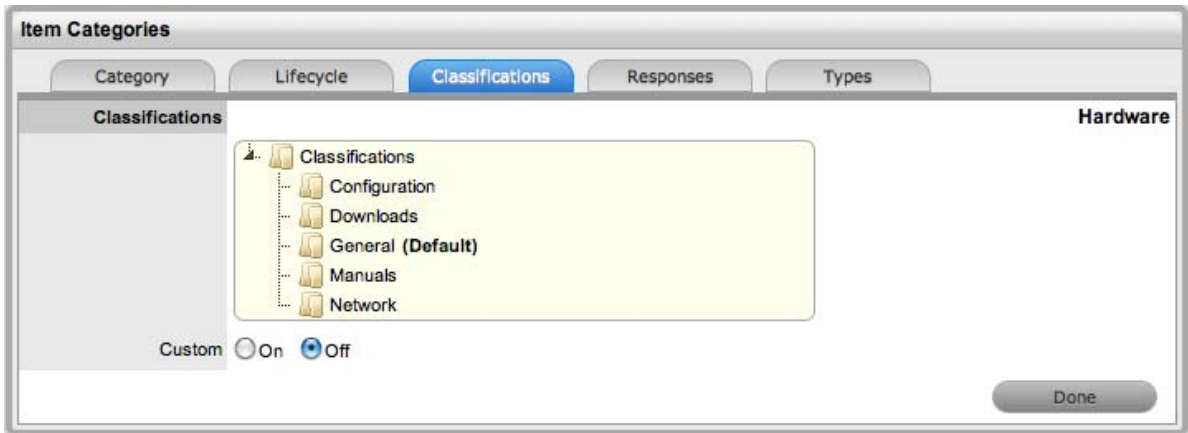
Supervisor Users can define additional Classifications for specific Item Types, within the Configuration>Categories>Item Categories>Classification tab.

The system is installed with several default Classification Type Categories, which can be edited if required.

**NOTE:** The General Classification is owned and used by the system and cannot be deleted. It is also advised that this Classification not be renamed, as this is the Classification assigned to requests when they are created via email.

## 1.33.1 Classification Tab

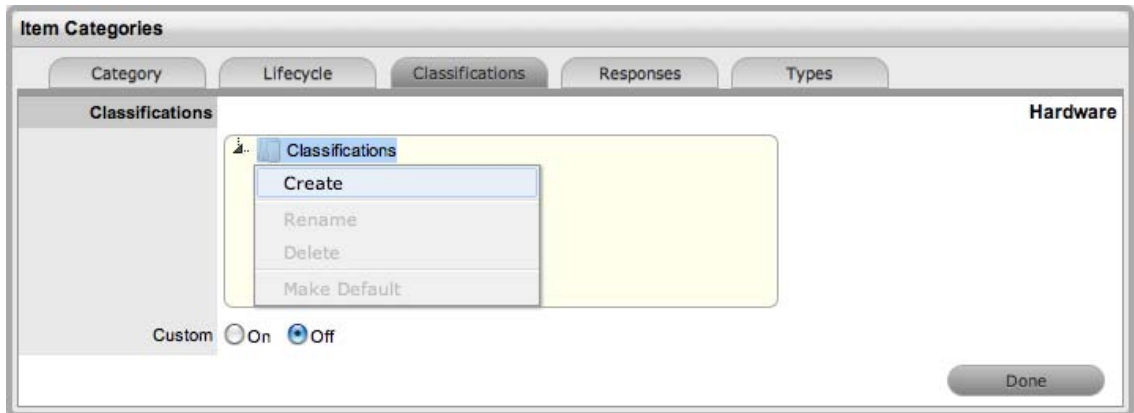
Additional Classifications can be created for each Item Category, while the system provided Classifications can be renamed or deleted. The Custom facility, when enabled, allows Users to add Classifications during the request creation process.



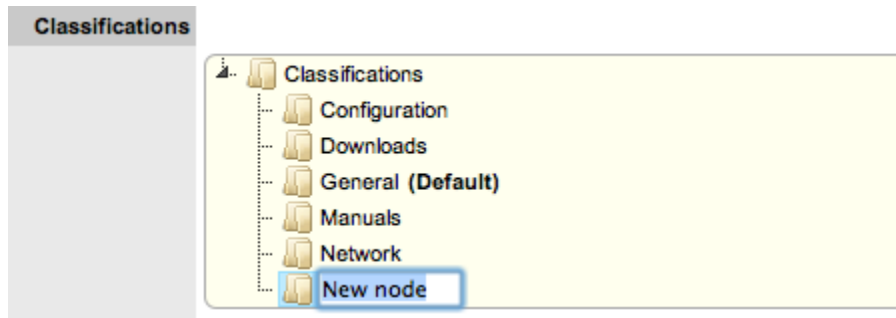
### Creating a New Item Category Classification

To add a new Classification:

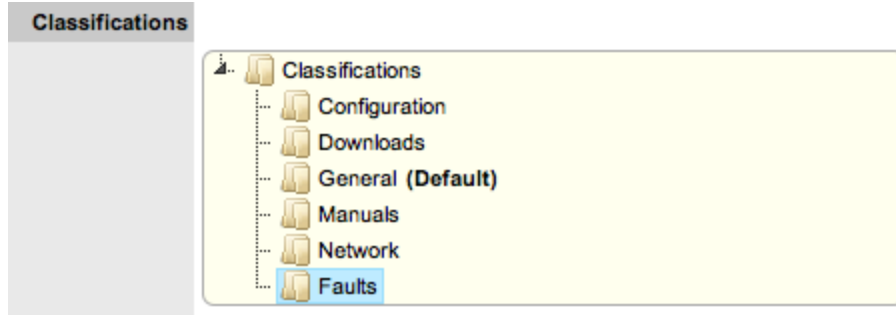
1. Select the Classification tab of an Item Category
2. Right-click on the Classifications header
3. Select Create



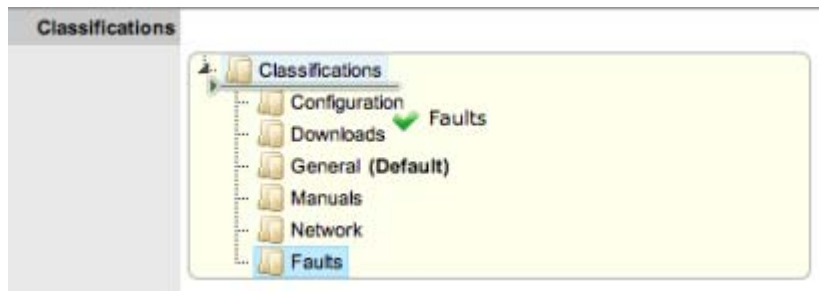
4. Enter the details in the newly created node



5. Click outside the text box to commit the entry listing



6. Repeat the above process to create all required list entries
7. Move an existing Classification to a new position, if required  
Select the entry, then drag and drop the entry into its new location.



8. Click Save.

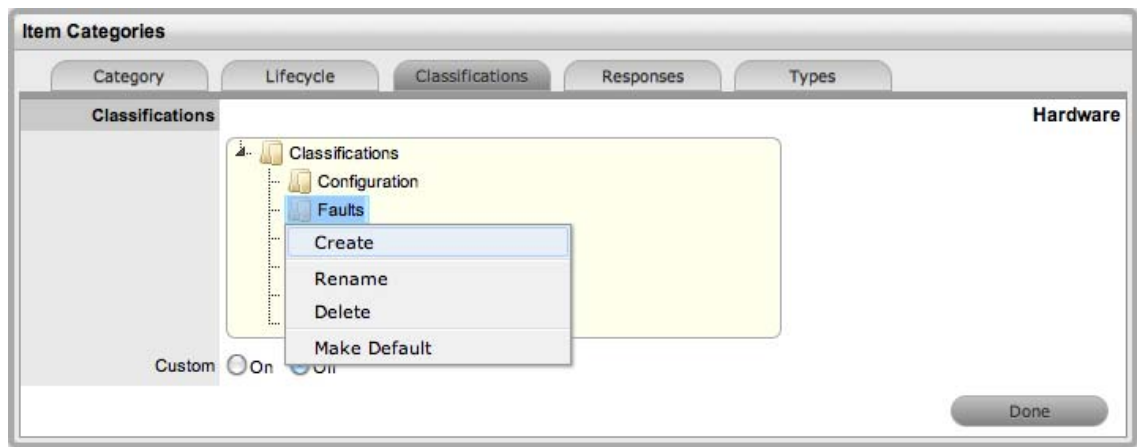
## Creating Sub-Classifications

Classifications can be expanded to include nested Classifications.

To create Sub-Classifications:

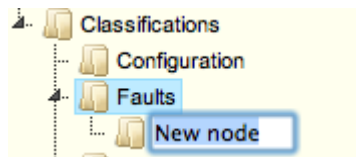
1. Right-click the relevant Classification header

The Create, Rename, Delete and Make Default options are displayed.



2. Select Create

A text box will appear under the Classification.



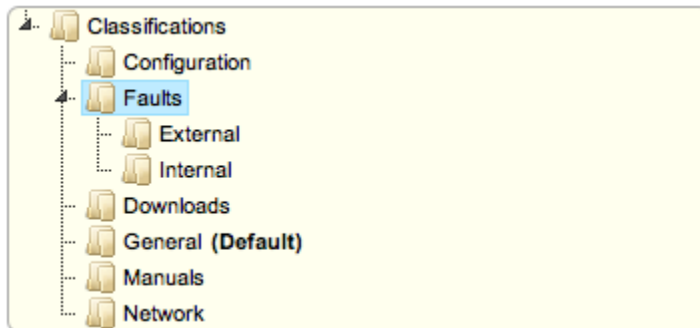
3. Enter the name for the list entry

4. Click away from the text box to commit and save the change

5. Move an existing Classification to a new position, if required

Select the entry, then drag and drop the entry into its new location

6. The above steps can be repeated until the sub-category list is completed.

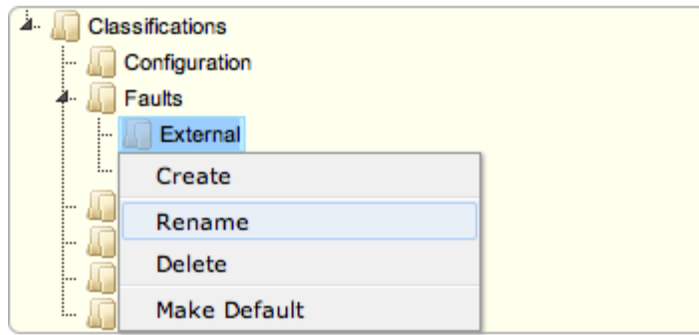


## Renaming a Classification

Any Item Category classification can be renamed.

To rename a Classification:

1. Right-click the Classification



2. Click Rename
3. Edit the field content
4. Click away from the text field to save the change.

## Deleting a Classification

To delete a Classification:

1. Right-click the relevant list entry
2. Click Delete
3. Click Done when the Classification Categories are complete.

## 1.34 Service Catalog

The Service Catalog can be accessed as a filter view within the Items sub-menu screen of the Configuration tab. It is part of the Service Portfolio made available to Customers, displaying information regarding Live IT Services. The Service Catalog may include information about service deliverables, any associated costs, contact points, ordering and request procedures.

For an IT service organization, the Service Catalog may include the following options:

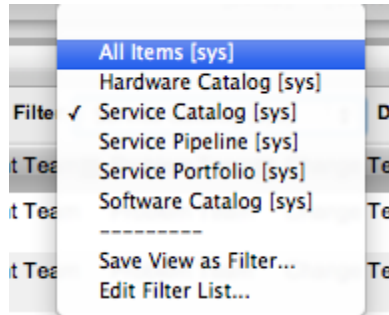
- ◆ Email
- ◆ Network Monitoring
- ◆ Security
- ◆ Video Conference
- ◆ Remote Access
- ◆ Mobile Communications (Cell Phones/PDAs)
- ◆ Wireless
- ◆ Laptop Computing
- ◆ Desktop Computing
- ◆ File Sharing
- ◆ Printing/Scanning.

Items included in the Service Catalog can be included as standalone Items or underpinned by physical Items stored within the Configuration Management Database (CMDB). Within the CMDB, relationships can be mapped between Configuration Items (Items) in the Relationships tab of an Item. This map is then available within the Impact tab of a request, to allow for the impact of a request on the Organization to be assessed.

Service Catalog Relationships are defined and visible within the Relationships tab of an Item.

To view the Service Catalog:

1. Within the Configuration>Items tab
2. Select the Service Catalog (sys) filter



### 1.34.1 Create a Service


To create a new Service, such as Email or Printing, create an Item Type template using the Service Category Template, which has the Service Category option enabled within the Categories tab (See: [Category](#)). As part of the Service Category template, define relevant attribute fields as being Customer Visible, which will display information recorded on the Details tab of the Service within the expanded view of a Service in the Customer Portal.

Home Self Help Requests **Services** Items

This screen includes the Services that you have registered access with the Service Desk. To view the details of a Service click on the Service ID number.

To display a list of all Services offered by the Service Desk, select the Service Catalog option within the Menu sidebar.

Log a request against a Service by clicking the New Request option within the Menu sidebar when the Service details are expanded. Complete any required fields, the Classification, Description and Save.



**Service # 100003**

| Properties            |  |               |                  |                  |                 |                |        |         |          |          |    |      |          |          |          |    |        |          |          |          |    |     |          |          |          |    |
|-----------------------|--|---------------|------------------|------------------|-----------------|----------------|--------|---------|----------|----------|----|------|----------|----------|----------|----|--------|----------|----------|----------|----|-----|----------|----------|----------|----|
| Category              | Service  |               |                  |                  |                 |                |        |         |          |          |    |      |          |          |          |    |        |          |          |          |    |     |          |          |          |    |
| Type                  | Email Service  |               |                  |                  |                 |                |        |         |          |          |    |      |          |          |          |    |        |          |          |          |    |     |          |          |          |    |
| Status                | Available  |               |                  |                  |                 |                |        |         |          |          |    |      |          |          |          |    |        |          |          |          |    |     |          |          |          |    |
| Service Level         | Silver   |               |                  |                  |                 |                |        |         |          |          |    |      |          |          |          |    |        |          |          |          |    |     |          |          |          |    |
| Service Level Targets | <table border="1"> <thead> <tr> <th>Priority</th> <th>Response Time</th> <th>Restoration Time</th> <th>Resolution Time</th> <th>24 x 7 support</th> </tr> </thead> <tbody> <tr> <td>Urgent</td> <td>9 Hours</td> <td>15 Hours</td> <td>27 Hours</td> <td>No</td> </tr> <tr> <td>High</td> <td>15 Hours</td> <td>27 Hours</td> <td>51 Hours</td> <td>No</td> </tr> <tr> <td>Medium</td> <td>21 Hours</td> <td>39 Hours</td> <td>75 Hours</td> <td>No</td> </tr> <tr> <td>Low</td> <td>27 Hours</td> <td>51 Hours</td> <td>99 Hours</td> <td>No</td> </tr> </tbody> </table> | Priority      | Response Time    | Restoration Time | Resolution Time | 24 x 7 support | Urgent | 9 Hours | 15 Hours | 27 Hours | No | High | 15 Hours | 27 Hours | 51 Hours | No | Medium | 21 Hours | 39 Hours | 75 Hours | No | Low | 27 Hours | 51 Hours | 99 Hours | No |
|                       | Priority   | Response Time | Restoration Time | Resolution Time  | 24 x 7 support  |                |        |         |          |          |    |      |          |          |          |    |        |          |          |          |    |     |          |          |          |    |
|                       | Urgent   | 9 Hours       | 15 Hours         | 27 Hours         | No              |                |        |         |          |          |    |      |          |          |          |    |        |          |          |          |    |     |          |          |          |    |
|                       | High   | 15 Hours      | 27 Hours         | 51 Hours         | No              |                |        |         |          |          |    |      |          |          |          |    |        |          |          |          |    |     |          |          |          |    |
|                       | Medium   | 21 Hours      | 39 Hours         | 75 Hours         | No              |                |        |         |          |          |    |      |          |          |          |    |        |          |          |          |    |     |          |          |          |    |
| Low                   | 27 Hours   | 51 Hours      | 99 Hours         | No               |                 |                |        |         |          |          |    |      |          |          |          |    |        |          |          |          |    |     |          |          |          |    |
| Description           | All issues with the Email Service should be logged via the Service Desk Customer Portal or by sending an email to <a href="mailto:servicerequest@servicesupport.com">servicerequest@servicesupport.com</a> .<br>Thanks.  |               |                  |                  |                 |                |        |         |          |          |    |      |          |          |          |    |        |          |          |          |    |     |          |          |          |    |

Visible as the Show Service Targets option is enabled in the Admin>Setup>Privileges>Customer tab

Content from the Description field in the Service Item Details tab

Menu

- New Request
- My Services
- Service Catalog**
- Outages
- Profile
- User Portal
- Admin Portal

Last Login  
Tue, 2 Aug 2011  
13:02:45

Search

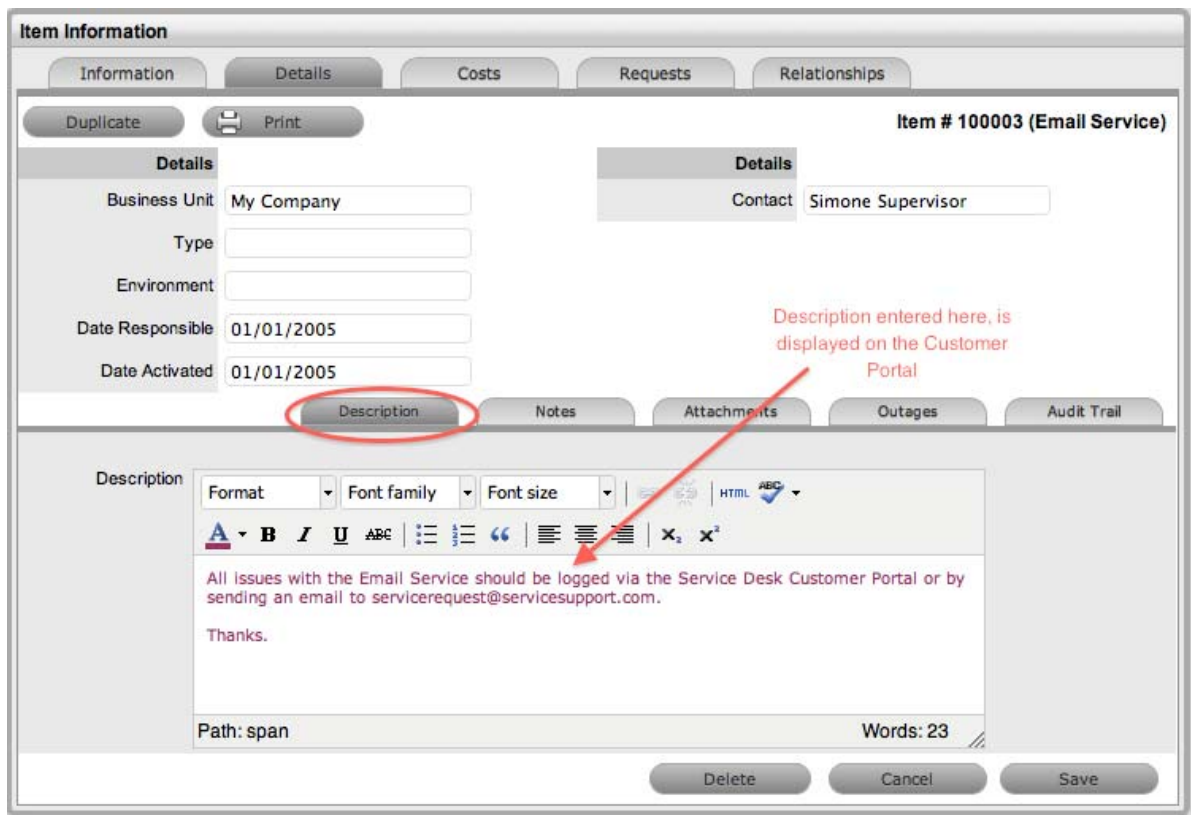
Service #

Type

Category

Done

Then create an Item using the newly created Type template. Within the Details tab of the Service Item, complete the Description to provide information about the Service within the Customer Portal Services tab. (See: [Item Details](#))



Within the Item Relationship tab, define the underpinning infrastructure of the new Service Item, if relevant. (See: [Relationships](#).)

## 1.34.2 Managing Service Costs

Users with the Finance Role are able to manage the information related to Service Item Costs. Items created with the Category Template that have the Service Category option enabled, allow organizations to calculate and recover costs for offering services. At the Item Type level, the costs for offering a service can be calculated against multiple service level agreements. (See: [Item Types](#).) Within the Cost Tab of a Service Item, figures based on the Item Type associated with the Item are provided, to allow the support organization to recover costs for providing the Service. (See: [Service Item Cost Tab](#).)

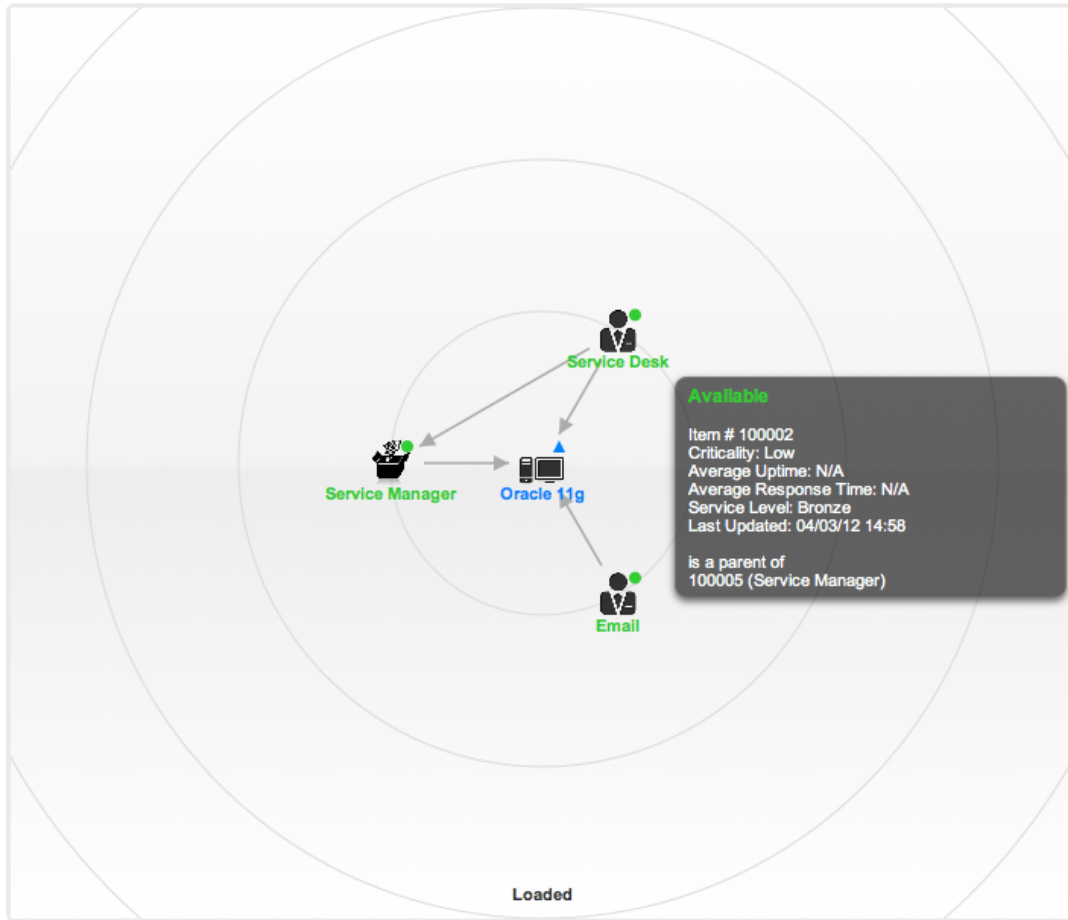
## 1.34.3 View Service Relationships

Within the Relationships tab of the Item Information screen, a Relationship Map visually displays the connections that have been defined for an Item. All Item Relationships are listed in the Relationships Table beneath the Map. The Relationship Map can display up to 48 Child Items and 16 Parent Items in the one diagram.

The central icon of a Map is a visual representation of the selected Item. Scroll over an Item label to view any information recorded on the Information and Details tabs of the Item. To drill-down through the relationships, click on an Item icon label. To change the focus of the Relationship Map to another Item, click on the Item icon label and the system will request that OK be selected before updating the central node of the Map.

The Relationship Table data displayed at the base of the map can be filtered using the Direction filter view of Parent-Child or Child-Parent.





| Direction     | Parent - Child |                 |        |          |              |
|---------------|----------------|-----------------|--------|----------|--------------|
| Relationships |                |                 |        |          |              |
| Current Item  | Relationship   | Related Item    | Item # | Category | Cost Split % |
| Oracle 11g    | is host of     | Service Manager | 100005 | Software | N/A          |
| Oracle 11g    | is a parent of | Service Desk    | 100002 | Service  | N/A          |
| Oracle 11g    | is host of     | Email           | 100003 | Service  | N/A          |

The map displays the relationship between each Lifecycle State by using different colors to represent the type of Lifecycle State.

**Color**

- Green Circle CI is assigned an online status.
- Red Square CI is assigned an offline status.
- Blue Triangle Service CI is assigned a pre-production status.

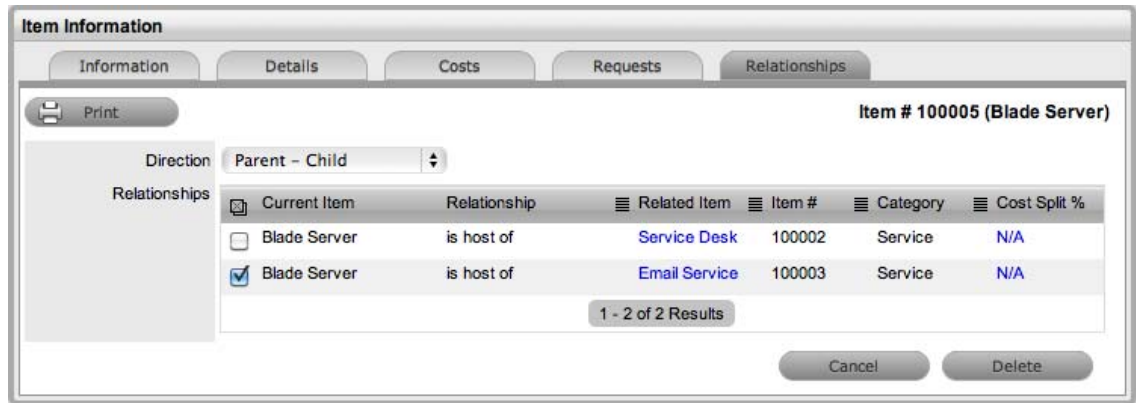
The Lifecycle State name can be accessed by scrolling over the Item icon within the Map.

## 1.34.4 Delete a Relationship:

To remove the Relationship between Items:

1. Select the relevant Item within the Configuration tab
2. Move to the Relationships tab
3. Click Edit
4. Select Delete

A table with the Relationship details is displayed



5. Select the Relationship Direction to display the relevant Relationship table
6. Mark the checkbox next to the Relationship that is to be removed
7. Select Delete
8. Click Done to return to the Item list.

## 1.34.5 Managing the Service Catalog

The portfolio of services offered within an organization can be managed by the Service Portfolio Team. See: [Service Portfolio Team](#).

## 1.35 Details Tab

Once the basic information for an Item has been completed, additional details can be defined for the Item. The Details tab displays a list of custom fields set for the Item's Category. The information to be completed within this section is configured by the Supervisor when customizing the Item Type templates in Configuration > Categories. Fields marked as Required, must be completed for the Item Details of the Item to be saved successfully.

For more information about Item custom fields, see: [Categories](#).

Clicking Save at the far bottom of the page after the Details tab has been completed, will create the Item and save it to the database.

---

**NOTE:** Items can be duplicated at any time by clicking the Duplicate button. A new Item is created with properties that are identical to the original Item (with the exception of the Item Number, as this must be unique and is generated automatically).

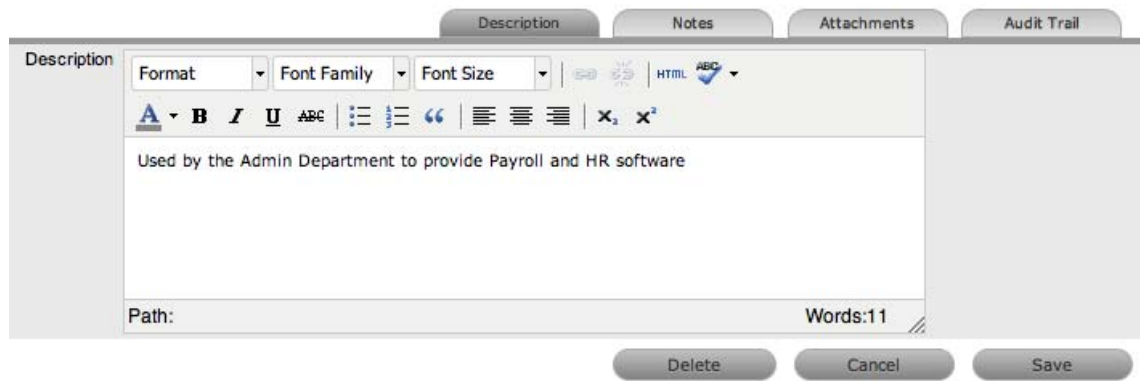
---

## 1.35.1 Item Description

Content entered in the Description field is made available on the Customer Portal in the expanded information window of an Item. For Service Items included in the Service Catalog tab of the Customer Portal, information about the Service can be included within the Item Description field. The Service Item information can be further defined by completing Item attribute fields that are configured as Customer Visible within the Category Information screen, and therefore also displayed in the Customer Portal.

To add an Item Description, within the Item's Details tab:

1. Click Edit
2. Move to the Description tab
3. Add information in the Description field



4. Click Save.

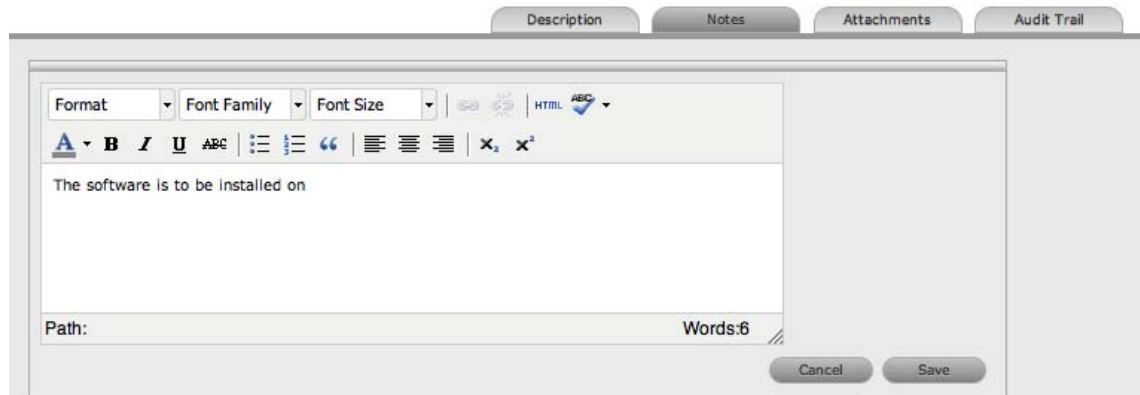
### 1.35.2 Item Notes

To add Notes to an Item, under the Item's Details tab:

1. Click Edit
2. Select the Notes tab



3. Click New
4. Enter details in the Notes field




5. Click Save.  
The Note will be allocated an identification number hyperlink for access. It will also be time- and date-stamped.

### 1.35.3 Item Attachments

To add Attachments to an Item, within the Item's Details tab:

1. Click Edit to display the Attachment tab New button
2. Click New



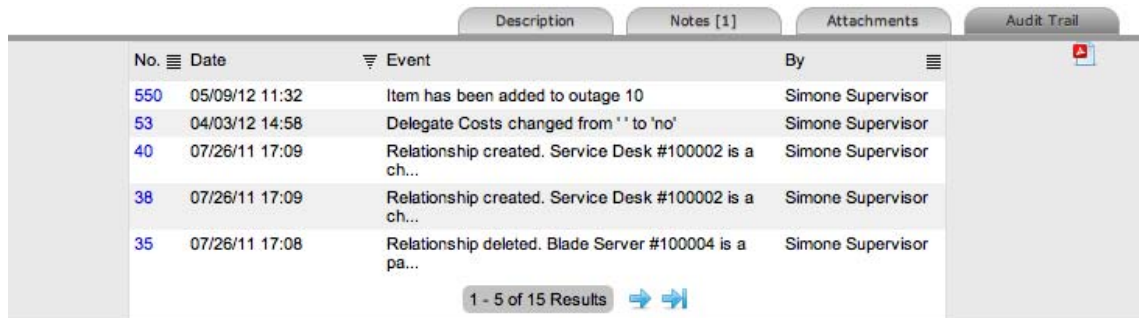
3. Browse and select a file
4. Enter a Description, if required
5. Adjust Private and Public option, if relevant  
Selecting Public will make it accessible on the Customer Portal, when the Item is in a Customer Visible state.
6. Click .

### 1.35.4 Item Audit Trail

The Audit Trail tab records all changes that are made to fields within the Item Information and Details screens. These entries are made to record all the alterations made to Items and the CMDB.

To view an audit trail entry, under the Item Details tab:

1. Select the Audit Trail tab
2. Click on the identification number hyperlink to display the entry details.

A screenshot of the Audit Trail tab interface. At the top, there are four tabs: 'Description', 'Notes [1]', 'Attachments', and 'Audit Trail'. Below the tabs is a table with the following columns: 'No.', 'Date', 'Event', and 'By'. The table contains five rows of data. At the bottom of the table, there is a pagination control showing '1 - 5 of 15 Results' and two blue arrows pointing left and right.

| No. | Date           | Event   | By                |
|-----|----------------|---|-------------------|
| 550 | 05/09/12 11:32 | Item has been added to outage 10                      | Simone Supervisor |
| 53  | 04/03/12 14:58 | Delegate Costs changed from '' to 'no'                | Simone Supervisor |
| 40  | 07/26/11 17:09 | Relationship created. Service Desk #100002 is a ch... | Simone Supervisor |
| 38  | 07/26/11 17:09 | Relationship created. Service Desk #100002 is a ch... | Simone Supervisor |
| 35  | 07/26/11 17:08 | Relationship deleted. Blade Server #100004 is a pa... | Simone Supervisor |

### 1.35.5 Rollback Option

All changes recorded in the Audit Trail can be rolled back to reinstate information recorded against an Item.

To return Item details to previously saved information:

1. Click Edit
2. Select the identification number hyperlink of the entry to be reversed
3. Click the Rollback button

4. Save the Item.

The Item details will revert to information recorded before an update was made.

## 1.36 Relationships Tab

The Relationship Tab allows Users to view and/or create a Relationship Map for the current Item, with other Items within the CMDB.

The Relationship direction can be defined as:

- ♦ Service Oriented - Parent-Child Relationship
- ♦ Component Oriented - Child-Parent Relationship.

Within each view the Relationship Class can be defined as:

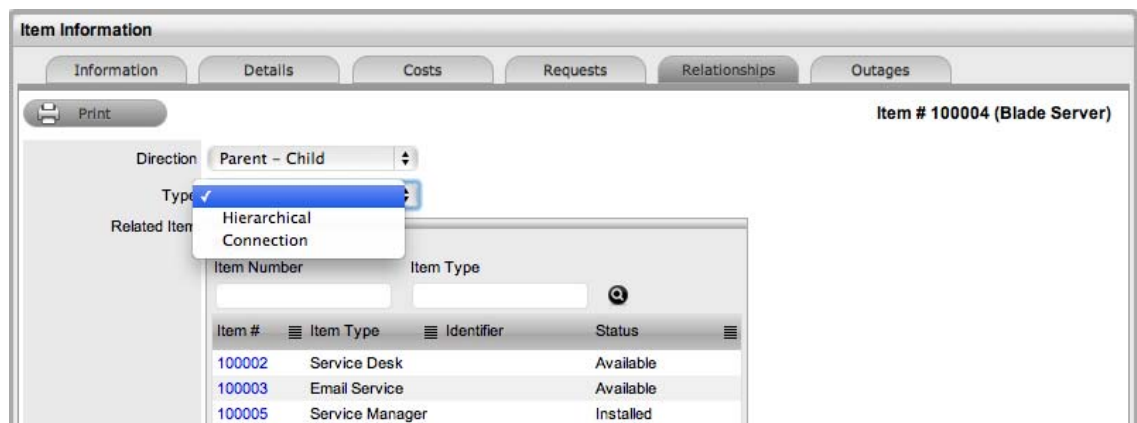
- ♦ Hierarchical Relationship
- ♦ Connection - an association between the selected Items.

For a Service, such as the Email or Web Site Service, it is recommended that the Hardware be defined as the Parent for the Software Items and the Software be defined as the Parent of the Email or Web Site Service.

### 1.36.1 Create a Relationship

To create a new Item Relationship:

1. Select Configuration>Items
2. Select an Item
3. Select the Item's Relationship tab
4. Click Edit
5. Click New
6. Select the Relationship Direction and Class from the drop-down menus
7. Define the Relationship by selecting a description from the drop-down list



---

**NOTE:** If the Relationship Type has the Inherit Parent Ownership option enabled, Child Items that use this relationship will inherit the Parent Item's owners. The ownership will not be editable and no other Parent Item can be assigned to the Child Item. A warning will be displayed if a relationship type has the Inherit Parent Ownership option enabled.

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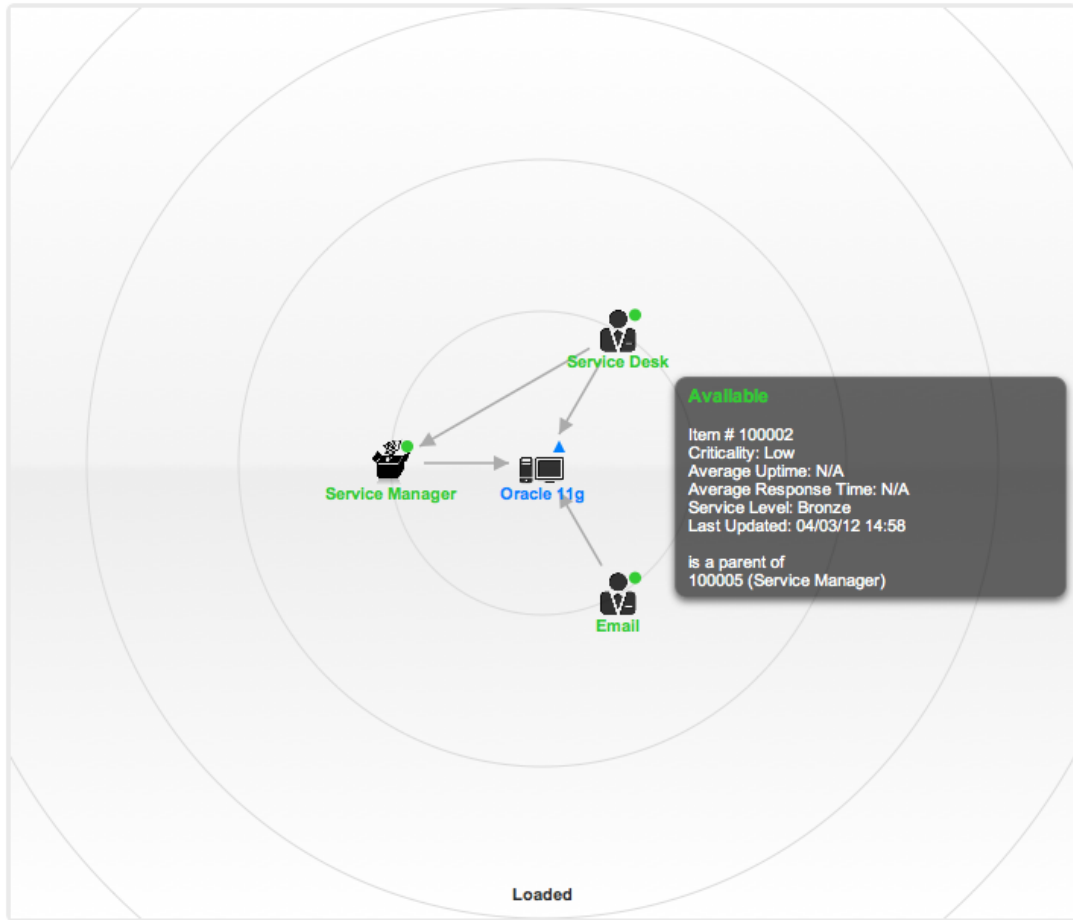
8. Use the Find Item field to locate the relevant Item
9. Click on the Item Number hyperlink to create the Relationship
10. Click Save to default to the Relationship Map view.

## 1.36.2 Relationship Map

Within the Relationships tab of the Item Information screen, a Relationship Map visually displays the connections that have been defined for an Item. All Item Relationships are listed in the Relationships Table beneath the Map. The Relationship Map can display up to 48 Child Items and 16 Parent Items in the one diagram.

The central icon of a Map is a visual representation of the selected Item. Scroll over an Item label to view any information recorded on the Information and Details tabs of the Item. To drill-down through the relationships, click on an Item icon label. To change the focus of the Relationship Map to another Item, click on the Item icon label and the system will request that OK be selected before updating the central node of the Map.

The Relationship Table data displayed at the base of the map can be filtered using the Direction filter view of Parent-Child or Child-Parent.



Direction: Parent - Child

| Relationships | Current Item | Relationship   | Related Item    | Item # | Category | Cost Split % |
|---------------|--------------|----------------|-----------------|--------|----------|--------------|
|               | Oracle 11g   | is host of     | Service Manager | 100005 | Software | N/A          |
|               | Oracle 11g   | is a parent of | Service Desk    | 100002 | Service  | N/A          |
|               | Oracle 11g   | is host of     | Email           | 100003 | Service  | N/A          |

The map displays the relationship between each Lifecycle State by using different colors to represent the type of Lifecycle State.

**Color**

- Green Circle CI is assigned an online status.
- Red Square CI is assigned an offline status.
- Blue Triangle Service CI is assigned a pre-production status.

The Lifecycle State name can be accessed by scrolling over the Item icon within the Map.

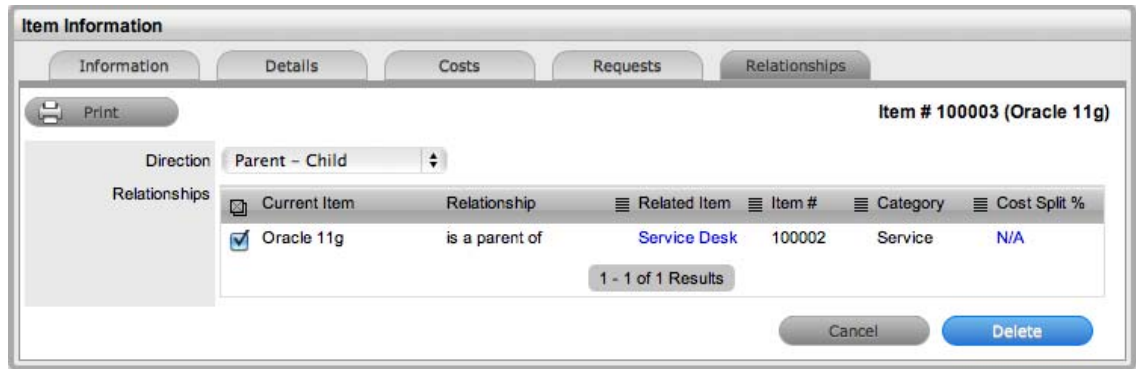


### 1.36.3 To delete a Relationship:

To remove the Relationship between Items:

1. Select the relevant Item within the Configuration tab
2. Move to the Relationships tab
3. Click Edit
4. Select Delete

A table with the Relationship details is displayed.



5. Select the Relationship Direction to display the relevant Relationship table
6. Mark the checkbox next to the Relationship that is to be removed
7. Select Delete
8. Click Done to return to the Item list.

### 1.36.4 AMIE Item Imports and Relationships

Items with Item relationships that have been imported using the AMIE engine, retain the relationships that exist within the Asset Management Tool. A visible map of the relationships is recorded within the Relationships tab.

## 1.37 Item Types

Item Types are templates used to create Items. Items are specific instances of Item Types with individual asset detail information.

In this section, Item Types and their manufacturers can be created and edited. The Item Types default support Team is assigned here, as well as Criticality, service level and other default information.

| Item Type                              | Item Category | Manufacturer | Service Level | Incident Team | Problem Team | Change Team | Request Team | Criticality | Identifier    |
|--|---------------|--------------|---------------|---------------|--------------|-------------|--------------|-------------|---------------|
| <input type="checkbox"/> Blade Server  | Hardware      | Dell         |               | Incident Team | Problem Team | Change Team | Request Team | Moderate    | Serial Number |
| <input type="checkbox"/> Email Service | Service       | My Company   |               | Incident Team | Problem Team | Change Team | Request Team | Moderate    |               |
| <input type="checkbox"/> iWork 09      | Software      | Apple        |               | Incident Team | Problem Team | Change Team | Request Team | Very Low    | Version #     |

For Item Types that use a Category with the Service Category functionality enabled, a Costs tab is also displayed that allows a User with the Finance Role to forecast the costs for offering the Service Item that applies the Item Type.

## 1.37.1 Create a New Item Type

To enter a new Item Type:

1. Select Configuration>Types
2. Click New

The Type Information screen appears.

3. Enter the Name of the Item Type
4. Enter a Manufacturer using the drop-down list

Or, select to add a Manufacturer. The Manufacturer screen appears. See: [Create a Manufacturer](#)

- 5.

---

### Type Information

|              |  |
|--------------|--|
| Name         | Name of the Item Type.   |
| Manufacturer | The manufacturer of the Item Type. New manufacturers can be created and existing manufacturers can be edited and deleted by using the Edit and New buttons that appear beside the drop-down menu of manufacturers. |



---

6. Using the drop-down list, select the relevant Item Category
7. Select the Criticality for the Item Type
- 8.

---

### Item Type

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|                |  |
|----------------|--|
| Item Category  | This signifies the type of Item. (Hardware, Software or Service are the default Types, but Users with the Supervisor Role can create more if required).  |
| Identifier     | The drop-down list that appears is drawn from the fields defined for the Item Category selected. Although this information is not required, the Identifier is used to differentiate similar Items that may be in use throughout an organization. For example, if an organization uses the same printers for all departments, an Item Category field of "Location" could be configured for the Item Details and this could also be used as a secondary Identifier for Printer Item.   |
| Criticality    | <p>Rates the degree of importance of an Item Type within an organization, which can be adjusted on a per Item basis. The 'Impact' of a Request is initially pulled from the Criticality of the Item, but can be adjusted within the request Information screen if required. Requests logged through the Customer Portal, use the Criticality of the Item to set the Priority of the request.</p> <p>The Incident Analyzer, if enabled by the Administrator in Setup&gt;CMS&gt;Incident Analyzer, can apply the Criticality to automatically detect Problems.</p> <p>The minimum Criticality level can also be used to determine the off-line Items that appear on Outages pages, if the Outages pages are enabled by the Administrator in Setup&gt;Privileges&gt;System.</p> |
| Icon           | When the Type details are saved, the Icon selected for the Item Category will be displayed. To customize the icon for the specific Item Type, select the Icon to access the Upload  or Cancel  options. The icon must be 128 x 128 pixels.   |
| Unit Price     | The per-unit price of the Item Type.   |
| Instance Total | Number of instances owned by the organization.   |
| Assigned       | Number of instances assigned to Customers as Items.  |

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---

| Item Type             |  |
|-----------------------|--|
| Hidden                | <p>Select 'On' to ensure Customers cannot view this Item Type within the list in the Customer Portal. If all Item Types use this selection, the Item Type list will be completely removed from the Portal.</p> <p>Items created using Item Types with Hidden enabled, will not allow Customers to generate requests against them in the Customer Portal, nor will they be able to view or receive updates about requests logged by the User against Items with this functionality enabled.</p> |
| Creation              | <p>Enabling this option gives Customers using the portal the ability to create new Items using this Item Type (if they have been granted the ability to create Items by the Administrator in Setup&gt;Privileges&gt;Customer&gt;Create Item. (This option is not displayed when the Hidden option is enabled.)</p>   |
| Ignore Share          | <p>Enabling this option overrides the system level option for sharing requests raised against Items of this Type. Requests raised against Items of this Type will not appear in the customer portal when viewing shared requests is enabled.</p>   |
| Add Forum Topic       | <p>Create a forum topic using the Item Type Name. This option is only displayed when a new Type is being created.</p>  |
| Incident Default      | <p>The Team of Technicians assigned to support Incidents received related to the Item Type. See: <a href="#">Teams</a></p>   |
| Problem Default       | <p>The Team of Technicians assigned to support Problems received related to the Item Type. See: <a href="#">Teams</a></p>  |
| Change Default        | <p>The Team of Technicians assigned to support Change Requests received related to the Item Type. See: <a href="#">Teams</a></p>   |
| Request Default       | <p>The Team of Technicians assigned to support Service Requests received related to the Item Type. See: <a href="#">Teams</a></p>  |
| Service Level Default | <p>The default service level for the Item Type. When Billing is enabled, service levels without a cost are listed as an option. The service level with an associated cost can be applied when the Item created, this ensures Item contract payment is processed.</p>   |
| Support Levels        | <p>All Service Level Agreements assigned to the Item Type, which will be displayed as options when a request is created applying Item that uses this Type template. SLAs listed here, are used within the Costs tab of Service Types to forecast break even points on the Service relative to the number of Users.</p>   |



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## Item Type

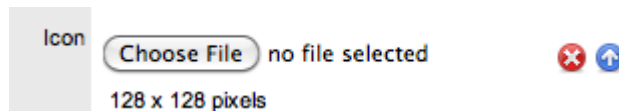
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Find SLA (Name)

To assign multiple SLAs use this option. Click  to view all SLAs or refine the search by entering a specific name. Select the SLA hyperlink to assign the SLA to the Type Information. Click  to clear the search field.

---

9. Enter the Unit Price for the Item Type. This is an optional field that is used for asset management  
See [Finance Role](#).
10. Set the Customer options
11. Assign the default support Teams
12. Assign one or multiple SLAs, as required
13. Click Save  
The Type Screen moves out of Edit mode.
14. Click the icon if the generic Item Category icon image is to be changed for the Item Type  
This icon is used as the visual representation of the Item Type in the Relationship Map.



- 
15. **NOTE:** The dimensions of the uploaded icon must be exactly 128 x 128 pixels
  16. Move to the Classification tab to create classifications for issues related to Item of this Item Type.
- 

## 1.37.2 SLAs and Item Types

When an Item Type is created with a defined SLA, any Item created using this Item Type automatically inherits the SLA. The lifecycle of a request raised against this Item is determined by the SLA milestones. However, it should be noted that the SLA can be adjusted within the Item if it is relevant to do so.

## 1.37.3 Classification

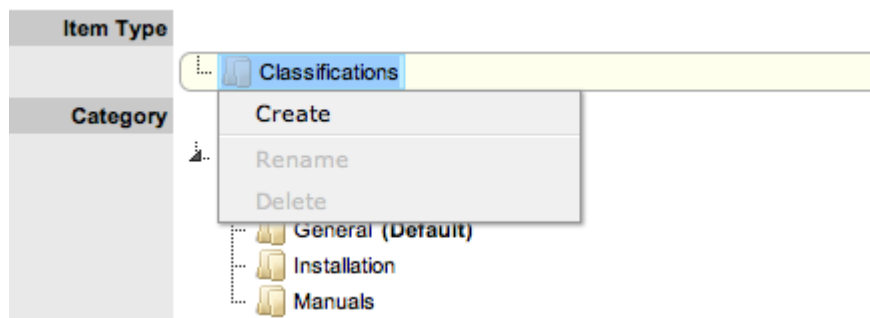
Category Classifications are used as generic problem classification for sorting requests. These are refined within the Item Type Classification to make them more relevant to the actual Item Type. For example, the Item Type category Hardware needs the Category Classification to be refined differently for hardware Item Types such as desktops and servers. To refine the problem types, Item Type Classifications are used.



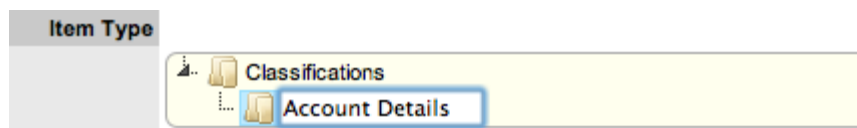
## Editing an Item Type Classification listing

To edit the Item Type Classification entry:

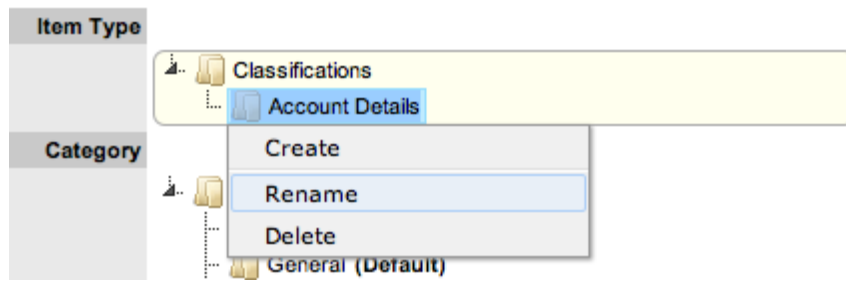
1. Within the Item Type>Classification tab
2. Select Edit
  - A New button is displayed within the Item Type Classification section.
3. Right-click on the Classifications link
  - The Create option is displayed.



4. Select Create
  - A New node field is displayed in Edit mode.
5. Complete the details of the new list entry



6. Click outside the text field to save the entry
7. To re-name an entry, highlight the field



8. Select the Rename option  
The field opens in edit mode
9. Change the details
10. Click outside the text field to save the changes
11. Repeat the above process to create all required list entries
12. Move existing Classifications to a new position, if required  
Highlight the entry, then drag and drop the entry into its new location.
13. Click Save.

## Creating Sub-Classifications

Classifications can be expanded to include sub-categories.

To create sub-classifications:

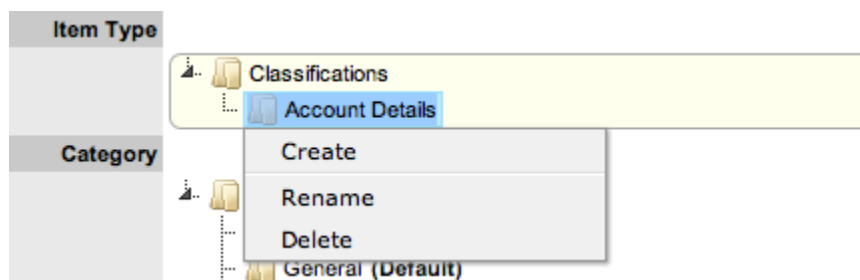
1. Select the relevant Classification header

The Classification header is highlighted.

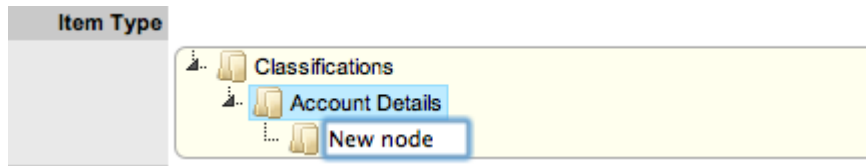


2. Right-click the Classification Entry

The Create, Rename and Delete options are displayed



3. Click Create
4. Complete the details of the new node



5. Click away from the text field to save the change
6. The above steps can be repeated until the Sub-Classification list is completed.
  - To move an existing entry to a new position, select the entry, then drag and drop the entry into its new location

## 1.37.4 Items

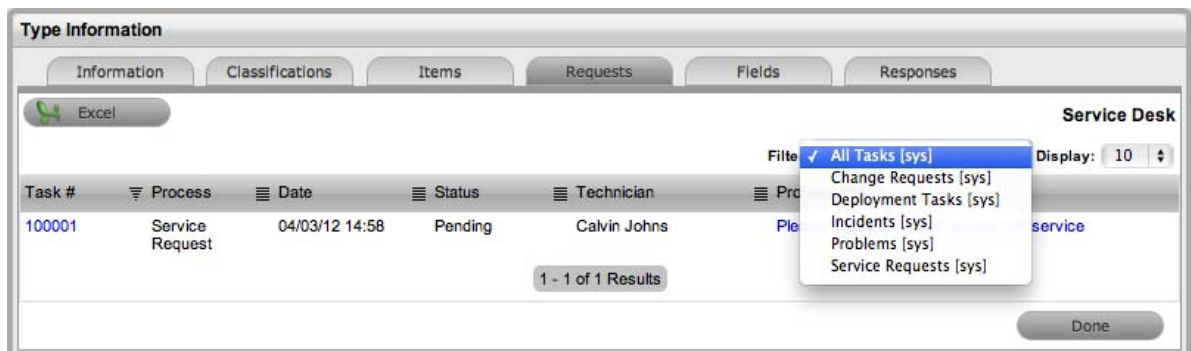
The Items tab lists the Items created using this Item Type. Individual Item details can be viewed by clicking on an Item Number. The list of Items can be exported using the Excel button.



## 1.37.5 Requests

The Requests tab lists all requests that have been created for this Item Type.

Use the Filter to switch between Incident, Problem, Change and Service Requests views. Requests can be viewed from this screen by clicking on the Task# or Problem Report hyperlink. The list of Requests can be exported using the Excel button.



## 1.37.6 Costs

---

**NOTE:** This is only visible to Users with the Finance Role.

---



The Costs tab is only available within the Service Type Information screens and allows organizations to calculate the Break-Even Point (BEP) of a service based on forecasting the number of Customers of that Service. This allows the service organization to account for the per calendar month price of the Service, which is used to calculate the ongoing revenue figures within the Item Costs tab that uses the Service Type template.

**Type Information**

Information | Classifications | Items | Requests | **Costs** | Fields | Responses

Service Desk

Forecast Costs

- Capital \$12,000.00
- Recovery 5 years
- Recurring 400.0 p.c.m

Actual Costs

- Capital \$12,000.00
- Recurring 150.0 p.c.m

| Services | SLA  | Cost (p.a.) | Current Users | Forecast Users | B.E.P. | Price (p.c.m) |
|----------|------|-------------|---------------|----------------|--------|---------------|
|          | Gold | \$2,000.00  | 16            | 100            | \$6.00 | \$173.00      |

Done

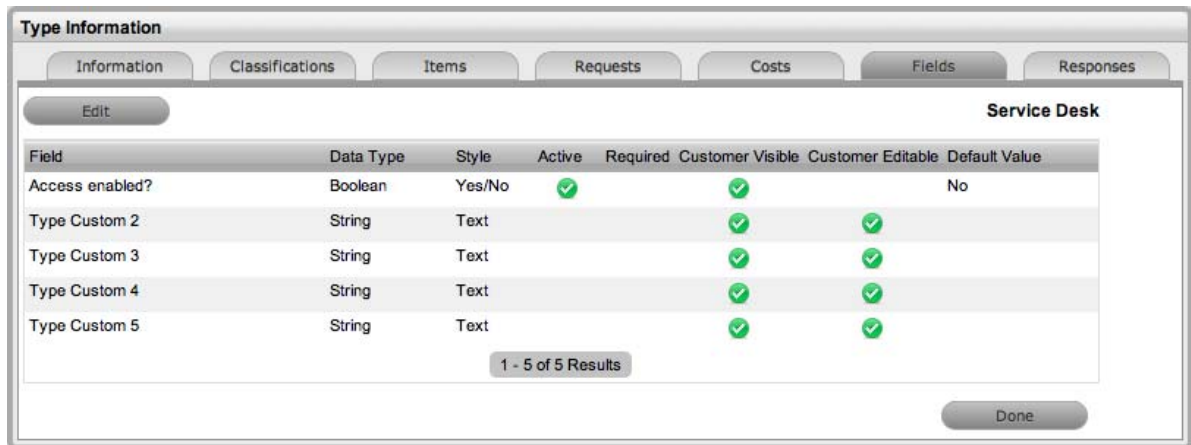
## Forecast Costs

|              |  |
|--------------|--|
| Capital      | Enter the sum total to be invested in hardware and software infrastructure that will underpin the Service.   |
| Recovery     | Complete the field with the expected number of years designated to recover the costs of implementing the Service.  |
| Recurring    | Enter the proposed ongoing cost, on a per calendar month basis, for offering the Service.  |
| Services     | Using the details entered in the Costs fields and the cost per annum of the SLA, enter the forecast number of Customers/Users to calculate the break even point (B.E.P) of the Service. Using the auto-calculated B.E.P., enter a per calendar month Price for the Service to recover costs. This figure is used in the <a href="#">Service Item Costs tab</a> to calculate the ongoing Revenue figures. |
|              | <b>NOTE:</b> If an SLA with an Internal Cost is assigned to the Type, the B.E.P will be the SLA cost divided by 12 plus the cost of recovering the Capital expenditure over the number of years defined for the Capital to be recovered. For example, where the SLA cost is \$240 for the year, the B.E.P will never be less than \$20 per month.  |
| Actual Costs |  |
| Capital      | Content for this field is derived from the Cost field within then Costs tab of the Item created using this Type.   |
| Recurring    | Content for this field is derived from the Monthly Cost field within the Costs tab of the Item created using this Type.  |

## 1.37.7 Fields

Within the system, service organizations can refine custom fields made available during the request creation process based on the Item assigned to the request. In the Fields tab a User can create custom fields that apply to the Item Type. Therefore, when a request is logged against an Item that uses an Item Type with custom fields configured within the Fields tab, the Fields are made available within the Details tab of the request creation process.

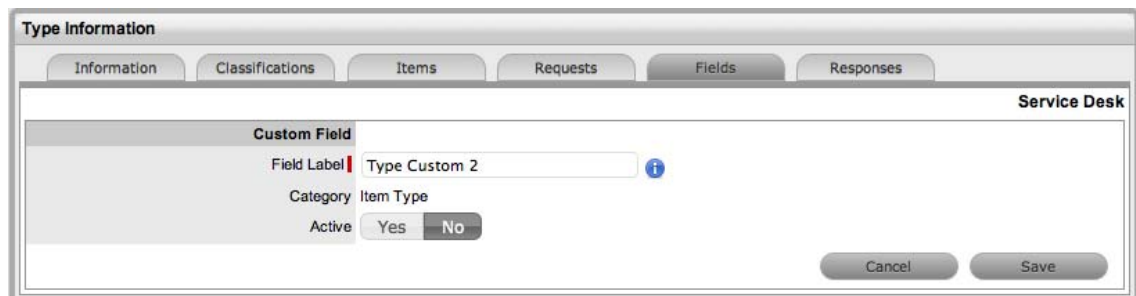
These fields are in addition to the fields created by the Administrator within the Admin>Setup>Custom Fields, which are created for the specific Process, such as Incident, Problem, Change and Service Requests.



To create Field labels within the Type Information screen:

1. Click the Fields tab
2. Click Edit
3. Select a Field hyperlink

The Custom Field screen is displayed



4. Click Yes to activate the Field
5. Complete the following details:
6. \_\_\_\_\_

| Categories Fields | Description                       |
|-------------------|-----------------------------------|
| Category          |                                   |
| Field Label       | The name of the field.            |
| Active            | Indicates if the field is active. |

| Categories Fields  | Description  |
|--------------------|--|
| Required           | Indicates if the field is required or mandatory field.   |
| Customer Visible   | <p>Defines if the Customer can see the field within the Customer Portal.</p> <p>If Yes is selected, define if the Customer can edit the field information on the Customer Portal.</p>  |
| Data Type          | <p>Dictates the field's Data Type. The options available include :</p> <ul style="list-style-type: none"> <li>◆ String - List or Free Text</li> <li>◆ Number</li> <li>◆ Boolean - radio buttons for Yes/No and True/False</li> <li>◆ Date - creates a date field</li> <li>◆ Currency- creates a currency field</li> <li>◆ Hyperlink.</li> </ul>                      |
| Style              | <p>States the style of the field.</p> <p>eg. String- List or Free Text field. See <a href="#">Lists</a> for more information on creating a list field type.</p>  |
| Unique Value       | When active, the system prevents the duplication of data within the customized field.  |
| Default Value      | Value entered is the default system entry for the field, when the field is not completed manually.   |
| Input Validation   | <p>When enabled the Input Mask and User Mask can be defined.</p> <p><i>Input Mask</i> : A regular expression to use for data validation of values entered by a User (i.e., Zip/Post Code, telephone no.)</p> <p><i>User Mask</i>: A User Friendly representation of the Input Mask that Customers can understand should it appear in a validation error message.</p> |
| Enable Description | When enabled a Description field appears, allowing the User to enter details of what information is the field is expected to capture. These details are accessible next to the custom field on the relevant screen.  |

7. Click Save.

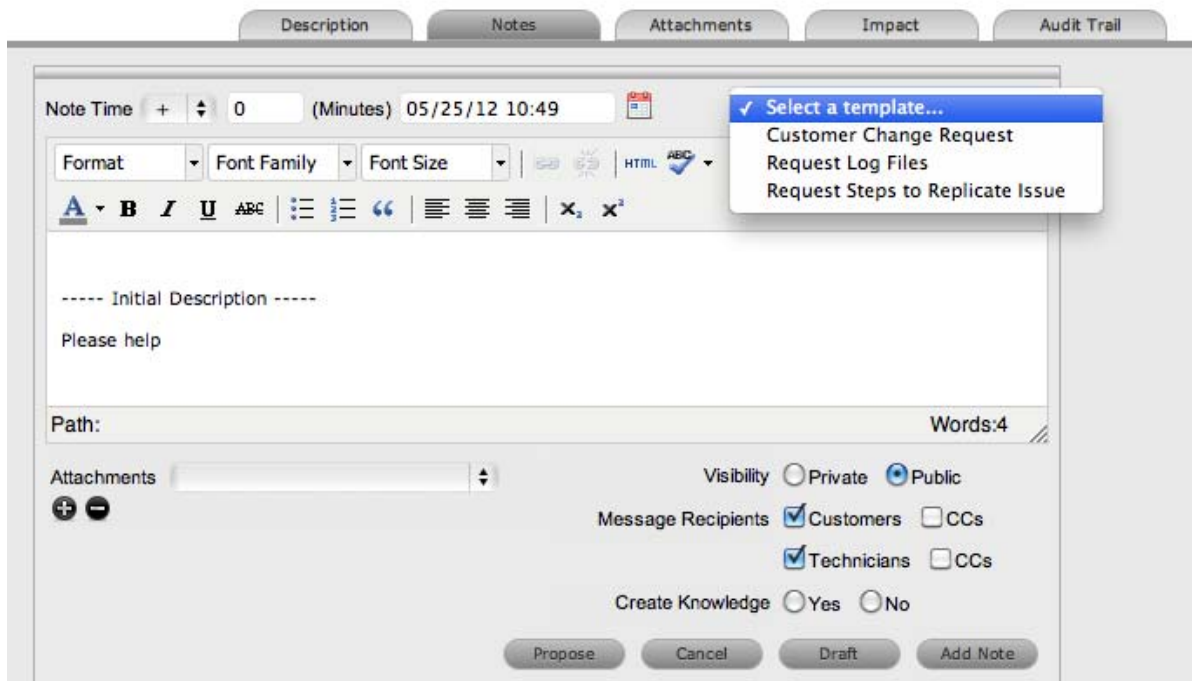
The active Field will now be available during the request creation process, for all Items that use the Item Type.

The screenshot shows a 'Request Information' dialog box with two tabs: 'Customer' and 'Details'. The 'Details' tab is active. Under the 'Request' section, 'Request Type' is set to 'New Incident' and 'Classification' is 'Service Offline'. In the 'Details' section, the 'Access enabled?' field has radio buttons for 'Yes' and 'No', with 'No' selected. A red arrow points to this field with the text 'Field configured in the Item Type>Fields tab'. Below this is a 'Subject' text field and a 'Description' rich text editor with a toolbar (bold, italic, underline, font family, font size, bullet points, numbered list, quote, indent, align, link, unlink, image, video, HTML) and a 'Words: 0' counter. At the bottom are 'Cancel' and 'Done' buttons.

## 1.37.8 Responses

The Responses tab within an Item Type displays the templates configured within the Item Category>Response tab, which can be used as content for Notes sent for requests received against the Item Category. In addition to saving time for customer responses that are sent on a regular basis, these ensure the service desk responds to issues in a consistent manner, in line with the support organization's policies and protocol. Within the Types>Responses tab, additional Note templates can be configured, that will only be available for requests logged against that Item Type.

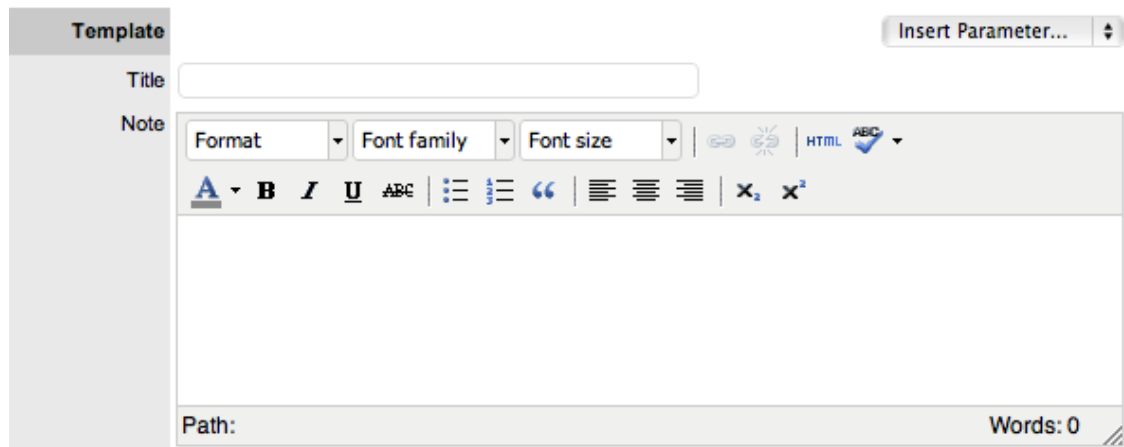
The following screen displays a list of default template options available within the Notes tab of a request:



## Adding a Template for Item Types

To add a Note template:

1. Go to the Responses tab
2. Click Edit
3. Click Add



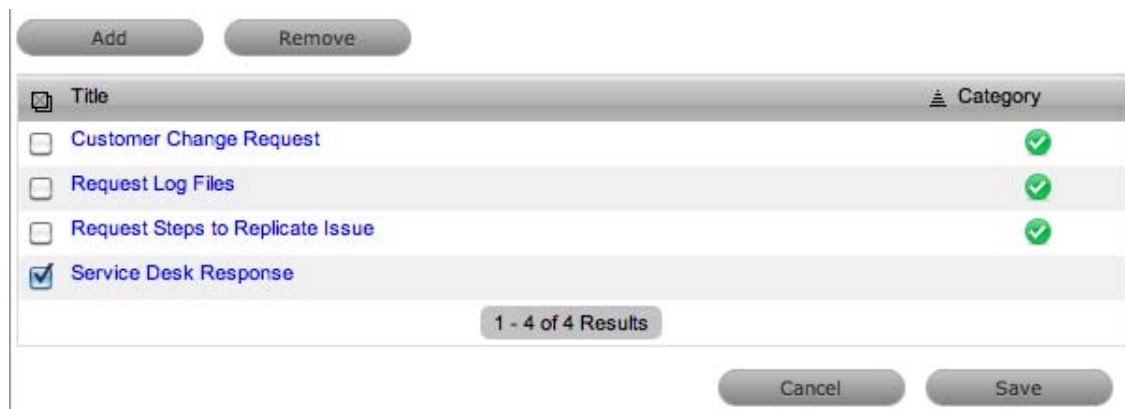
4. Enter the Template Title
5. Complete the content for the Note, inserting any relevant parameters
6. Click Save.

## Removing a Template

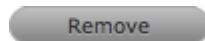
Within the Types>Response tab, only templates created for the Item Type can be deleted. Templates created at the Category level must be deleted within the Category>Responses tab.

To delete a template within an Item Type:

1. Go to the Responses tab
2. Click Edit
3. Check the box in the column next to the template Title



4. Click




5. Click Save.

## 1.38 Create a Manufacturer

Manufacturers are created and assigned to an Item Type to establish the distributor of the Type.

### 1.38.1 Creating a New Manufacturer

To create a new Manufacturer when creating a new Item Type:


1. Leave the Manufacturer field blank
2. Click the  button
3. Enter the Manufacturer name as well as any other details
4. Click Save.

The screen will return back to the Item Type Information window and display a confirmation that the Manufacturer has been created successfully.

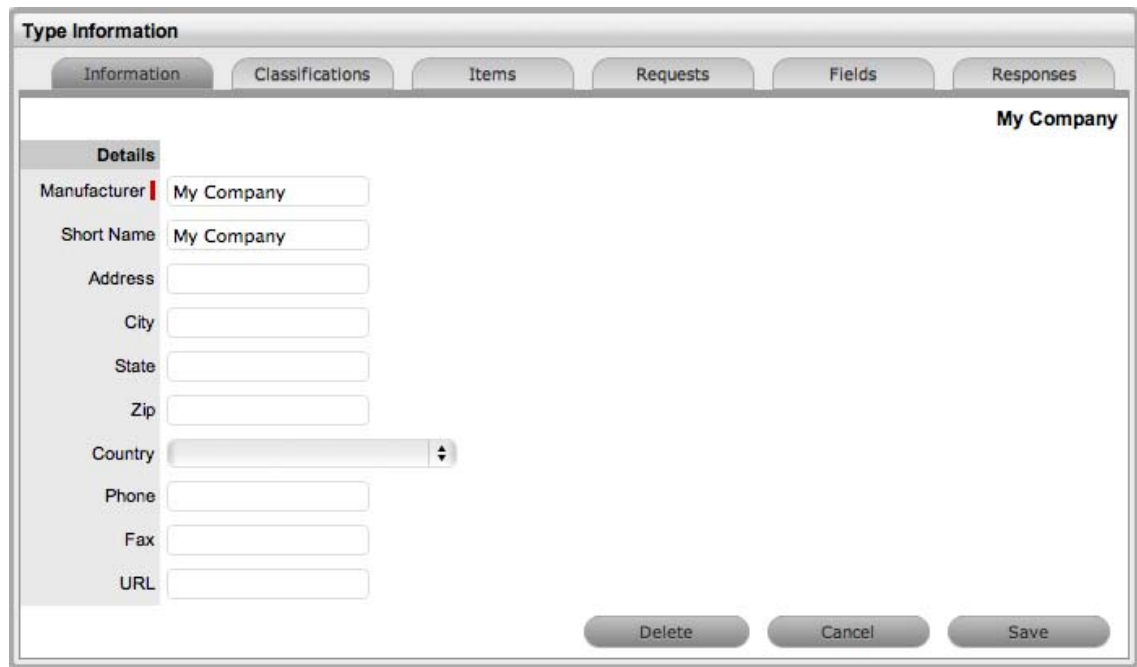
## 1.38.2 Editing a Manufacturer

Existing Manufacturers can be modified within the Item Type screen.

To edit a Manufacturer:

1. Select the Manufacturer from the list provided
2. Select  to open the Manufacturer information screen in Edit mode

The system will inform the User that any changes made to the Manufacturer will undo any unsaved Item Type changes. Click OK to continue.



The screenshot shows a window titled "Type Information" with several tabs: Information, Classifications, Items, Requests, Fields, and Responses. The "Information" tab is active. On the right side of the window, the text "My Company" is displayed. On the left side, under the "Details" section, there are several input fields: "Manufacturer" (containing "My Company"), "Short Name" (containing "My Company"), "Address", "City", "State", "Zip", "Country" (a dropdown menu), "Phone", "Fax", and "URL". At the bottom right of the window, there are three buttons: "Delete", "Cancel", and "Save".

3. Make the required changes
4. Click Save  
The screen returns to the Item Type screen.
5. Click Save and Done.  
The screen reverts to the Item Type list view.

## 1.39 Items



Configuration Items within the system are referred to as Items. Items have multiple connections with other elements throughout the application, these may include Customers, Organizational Units and Service Level Agreements. The table below outlines how Items interact with other system elements:

| Element                         | Relationship   |
|---------------------------------|--|
| Customers                       | Each Item must be assigned to one or more Customers who are the Owners of the Item. This Customer may be Everyone, making the Item a Global Item. Only Item Owners are able to raise requests against an Item. See <a href="#">Creating Items</a> .        |
| Service Level Agreements (SLAs) | Service Level Agreements can be linked as follows: <ul style="list-style-type: none"> <li>◆ Per Item</li> <li>◆ Per Customer</li> <li>◆ Per Request</li> <li>◆ Per Organizational Unit.</li> </ul>   |
| Teams                           | Within Item Types, Default Teams are assigned to Items. When requests are raised for an Item, they will be assigned to the Default Team.   |
| Technicians                     | Technicians can be associated with Skills based on Items, Item Types and Classifications. When a request is raised with the combination of Item Type and issue Classification, it is assigned to that Technician. See <a href="#">Classification Tab</a> . |
| Outages                         | Where states in the Lifecycle of an Item Type are defined as Off-line, when an Item is in an Off-line state, it will appear in the Outages page. See <a href="#">Categories LifeCycle</a> .  |

An Item record consists of the following attributes:

- ◆ [Information Tab](#)
- ◆ [Details Tab](#)
- ◆ [Costs Tab](#)
- ◆ [Requests Tab](#)
- ◆ [Relationships Tab](#)
- ◆ [Outages](#).

Options available within the Items screen include:

- ◆ [New](#) - Create an Item
- ◆ [Search](#) - Search for an Item
- ◆ [Bulk](#) - Allows the User to update details of multiple Items in a single screen.

Filter views that are available within the Configuration>Items screen include:

| Filter    | Relationship  |
|-----------|---|
| All Items | All Items stored within the CMDB, regardless of the assigned Lifecycle State. |



| <b>Filter</b>     | <b>Relationship</b>   |
|-------------------|---|
| Hardware Catalog  | All Items that use the Hardware Category Template stored within the CMDB, regardless of the assigned Lifecycle State.       |
| Service Catalog   | All Items that use the Service Category Template stored within the CMDB that are in an active Lifecycle State.              |
| Service Pipeline  | All Items that use the Service Category Template stored within the CMDB that are assigned a Pre-production Lifecycle State. |
| Service Portfolio | All Items that use the Service Category Template stored within the CMDB, regardless of the assigned Lifecycle State.        |
| Software Catalog  | All Items that use the Software Category Template stored within the CMDB, regardless of the assigned Lifecycle State.       |

### 1.39.1 View an Item

Within the Item sub-menu option, Users can view a list of Items created within the system. To view the details of an Item, select the Item Number hyperlink and the Item Information screen is displayed. The Item Information screen includes tabs for the following information:

- ◆ Attribute details
- ◆ Relevant costs
- ◆ Requests created against the Item
- ◆ Relationships associated with the Item
- ◆ Planned Outages associated with the Item..

## 1.40 Creating an Item

### 1.40.1 Creating an Item during request creation

To create a new Item for the Customer after they have been assigned to the request:

1. Move to the Find Item field

2. Click **+** to add a new Item using the Find Item Type field  
An expanded Item information screen appears, with the Item number field completed.

3. Enter the Item Type Name in the Find field, or leave empty and click **Q**
4. Select the Item Type hyperlink to assign the details to the new Item
5. Enter other required information
6. Click Next

The Item Details tab is displayed.

7. Enter any known Item details
8. Select Save.

The Item details are saved, select Next to complete the request creation process.

---

**NOTE:** This option is only available to Technicians if the system Administrator has enabled the Create Items option within the Setup>Privileges>User screen of the application.

---

## 1.40.2 Item Information

Item information allows the User to configure the basic information for the Item, most of which is pre-populated based on the Item Type selected for the Item. Within this screen the owners of the Item are also assigned.

To create an Item:

1. Select Configuration > Items
2. Click New

The Item Information screen appears.

---

### Item

### Description

Item Number\*

If the Administrator has set the Item Numbers Editable option in Setup> Privileges> System to Yes, the User will have the option of entering a customized Item number. It may contain numbers and/or letters, and be between 1 and 64 characters in length.

As no two Item Numbers can be the same, the User will be prompted to change the value they have entered if it is already in use. If the Item Number field is left blank, the system will automatically create an Item Number.

If the Administrator has set the Item Numbers Editable option to No, an Item Number will be generated automatically and cannot be edited.

---

| Item          | Description   |
|---------------|---|
| Category*     | This is auto-filled, based on the assigned Item Type.   |
| Type*         | This is the Item Type that the Item represents. Click the Search button to view the list of available Item Types.   |
| Team*         | This is the Technician Team that will be assigned to support the Item.  |
| Status*       | Select the status from the drop-down options displayed after the Item Type has been assigned.   |
| Criticality*  | Rates the degree of importance of an Item Type within an organization. The 'Impact' of a request is initially pulled from the Criticality of the Item, but can be adjusted within the request Information screen if required. Requests logged through the Customer Portal, use the Criticality of the Item to determine the Priority of the request. (See additional information below.)  |
| Service Level | Select the Service Level Agreement from the drop-down list, if required.  |
| Ownership     | <p data-bbox="894 919 1443 1035">These are the Customers who own the Item. A single Customer, a group of Customers or all Customers in the application can be assigned to an Item.</p> <ol data-bbox="915 1052 1443 1234" style="list-style-type: none"> <li data-bbox="915 1052 1443 1136">1. Enter a Customer last name, or leave blank then click the Search button to view a list of all available Customers.</li> <li data-bbox="915 1152 1443 1234">2. Click on the hyperlink for the relevant Customer name or names to assign them to the Item.</li> </ol> <p data-bbox="894 1257 1443 1339">If no specific Customer is allocated to the Item, it becomes a Global Item and is assigned to Everyone.</p>  |
| Customers     |   |
| Org Units     | <p data-bbox="894 1369 1443 1453">These are the Org Units who own the Item. The Item can be assigned to one or multiple Organizational Units.</p> <p data-bbox="894 1476 1130 1497">To assign an Org Unit:</p> <ol data-bbox="915 1514 1443 1854" style="list-style-type: none"> <li data-bbox="915 1514 1443 1598">1. Enter an Org Unit name, or leave blank then click the Search button to view a list of available Org Units.</li> <li data-bbox="915 1614 1443 1667">2. Click on the hyperlink for the relevant Org Unit name or names to assign them to the Item.</li> <li data-bbox="915 1684 1443 1854">3. <b>NOTE:</b> If Billing is enabled an owner must be assigned to the Item. The owner can be either a Customer or an Org Unit, but only Org Units that have a Primary Contact, will be displayed in the Org Unit Search list. (See: <a href="#">Primary Contact</a>.)</li> </ol> |

| Item         | Description  |
|--------------|--|
| Notification |  |
| Method       | This field is visible when an active Item moves into an offline State and allows the User to define who (Primary Contact or All Owners of the Item) and how (Email or SMS), Customers will be notified that the Item is not available. |

\*Denotes mandatory fields

4. Search and select an Item Type
5. Select a support Team for each process
6. Select the Item's Status and Criticality
7. Assign a Service Level

If Contracts are enabled for the system, the assignment of an SLA will result in an annual service contract automatically being applied to the Item. If an SLA is not assigned, a Contract can be created for the Item within the Costs tab.

8. Search and select a Customer and/or an Organizational Unit owner
9. Click Next to view the Details tab.

## Item Criticality

The Item Criticality is used to identify the degree of importance of an Item to an Organization.

When the Incident Priority is set to Derived in the Administrator Setup, the Impact of a request is mapped from the Criticality of the Item associated with the request and then combined with the selected Urgency, which derives the Priority of the request. If required, the Impact can be manually adjusted within the request Information screen. Requests logged through the Customer Portal, use the Criticality of the Item to determine the Priority of the request, which can be manually adjusted by the Technician User.

The following table displays the calculations applied by the system to the Item Criticality, which is mapped to a request's Impact to determine a request's Priority:

| Impact / Urgency | Urgent | High  | Moderate | Low   | Very Low |
|------------------|--------|-------|----------|-------|----------|
| Critical         | 1.000  | 0.850 | 0.700    | 0.550 | 0.410    |
| High             | 0.850  | 0.723 | 0.595    | 0.468 | 0.349    |
| Moderate         | 0.700  | 0.595 | 0.490    | 0.385 | 0.287    |
| Low              | 0.550  | 0.468 | 0.385    | 0.303 | 0.226    |
| Very Low         | 0.410  | 0.349 | 0.287    | 0.226 | 0.168    |

The above calculations result in the following Priorities:

| Priority | Upper | Lower |
|----------|-------|-------|
| Urgent   | 1     | 0.83  |
| High     | 0.83  | 0.58  |
| Medium   | 0.58  | 0.34  |
| Low      | 0.34  | 0     |

The Incident Analyzer, if enabled by the Administrator in Setup>CMS>Incident Analyzer, can apply the Criticality to automatically detect Problems. The minimum Criticality level can also be used to determine the off-line Items that appear on Outages pages, if the Outages pages are enabled by the Administrator in Setup>Privileges>System.

## Create an Item with Contracts Enabled

When Contracts are enabled with Billing, Items, Customers and Organizational Units can be linked together using a service contract. To automatically apply the system default support contract when creating an Item, simply select an SLA and an annual contract is applied. However, if an SLA is not required but a service contract is, the contract can be created within the Costs tab of the Item. See: [Costs Tab](#).

### 1.40.3 Details

Once the basic information for an Item has been completed, additional details can be defined for the Item. The Details tab displays a list of custom fields set for the Item's Category. The information to be completed within this section is configured by the Supervisor when customizing the Item Type templates in Configuration > Categories. Fields marked as Required, must be completed for the Item Details of the Item to be saved successfully.

For more information about Item custom fields, see: [Categories](#).

The screenshot shows the 'Item Information' window with the 'Details' tab selected. The 'Item # 100009 (Oracle11g)' is displayed in the top right. The 'Details' section is divided into two columns of fields. The left column includes Location, Environment, Version #, License Key, and License Count. The right column includes License Expiry, Ownership, Order #, Supplier, and Supply Date. Below these columns is a large 'Description' text area. At the top of the window, there are tabs for Information, Details, Costs, Requests, Relationships, Outages, and AMIE Snapshots. Below the tabs are buttons for Edit, Duplicate, and Print. A 'Done' button is located at the bottom right of the window.

Clicking Save at the far bottom of the page after the Details tab has been completed, will create the Item and save it to the database.

---

**NOTE:** Items can be duplicated at any time by clicking the Duplicate button. A new Item is created with properties that are identical to the original Item (with the exception of the Item Number, as this must be unique and is generated automatically).

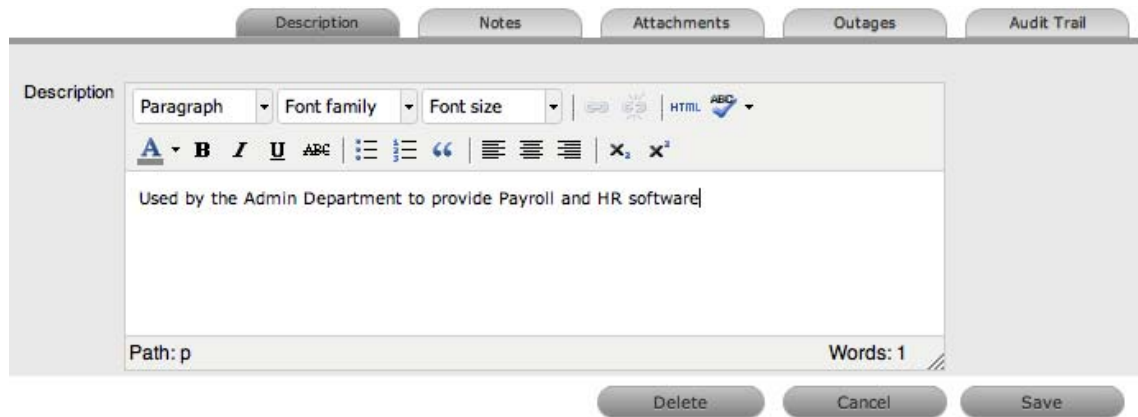
---

## Item Description

Content entered in the Description field is made available on the Customer Portal in the expanded information window for an Item. For Service Items, where a description of the Service may be required within the Customer Portal, details about the Service can be completed within the Item Description field. The Item and Service information can be expanded by completing Item attribute fields that are marked as Customer Visible and therefore displayed in the Customer Portal.

To add an Item Description, within the Item's Details tab:

1. Click Edit
2. Move to the Description tab
3. Add information in the Description field



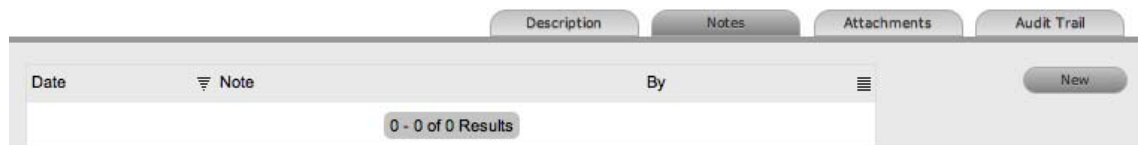
The screenshot shows the 'Description' tab selected in a tabbed interface. The main area contains a rich text editor with a toolbar including options for Paragraph, Font family, Font size, Bold, Italic, Underline, Bulleted list, Numbered list, Quote, Indent, Outdent, and Link/Unlink. The text area contains the text 'Used by the Admin Department to provide Payroll and HR software'. At the bottom, there is a 'Path: p' field and a 'Words: 1' counter. Below the editor are three buttons: 'Delete', 'Cancel', and 'Save'.

4. Click Save.

## Item Notes

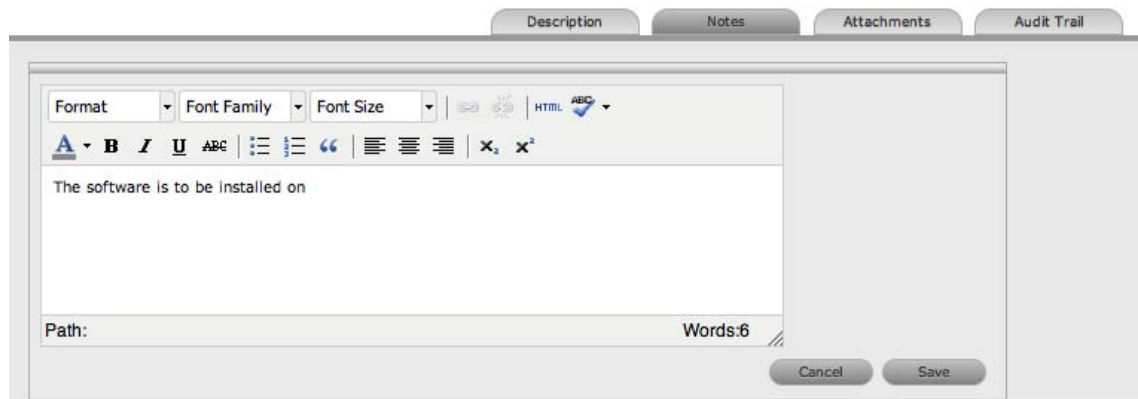
To add Notes to an Item, under the Item's Details tab:

1. Click Edit
2. Select the Notes tab



The screenshot shows the 'Notes' tab selected in a tabbed interface. Below the tabs is a table with columns for 'Date', 'Note', and 'By'. A 'New' button is located on the right side of the table. Below the table, there is a status bar that reads '0 - 0 of 0 Results'.

3. Click New
4. Enter details in the Notes field



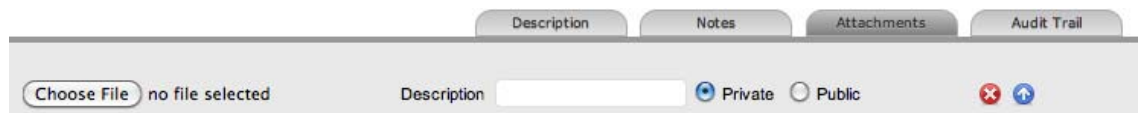
5. Click Save.

The Note will be allocated an identification number hyperlink for access. It will also be time and date-stamped.

## Item Attachments

To add Attachments to an Item, within the Item's Details tab:

1. Click Edit to display the Attachment tab New button
2. Click New



3. Browse and select a file
4. Enter a Description, if required
5. Adjust Private and Public option, if relevant

Selecting Public will make it accessible on the Customer Portal, when the Item is in a Customer Visible state.

6. Click .

## Item Outages

Planned outages can be created for an Item under the Outages tab. This is a period of time an Item will not be available for a Customer's use.

If an Item has an SLA with a specified Blackout Period, Outages should be planned to fall within this time. The Blackout Period is an agreement between the Customer and the Service Desk regarding a period of time when the Customer has no service expectations. This can also be the preferred time for Item upgrades and maintenance without affecting service availability.

When an Outage is being created, the Blackout Periods times are displayed to ensure the User creates a new Outage that does not breach the Item's SLA.



## Creating an Outage

To create an Outage:

1. Select Configuration > Items
2. Select the Item Number
3. Go to the Details tab
4. Click Edit
5. Go to the Outages tab

Item Information

Information Details Costs Requests Relationships Outages

Edit Item Number 100002 (Service Desk)

| No. | Start Date | End Date | Reason | By |
|-----|------------|----------|--------|----|
|-----|------------|----------|--------|----|

0 - 0 of 0 Results

Done

6. Click New

Item Information

Information Details Costs Requests Relationships Outages

Details

Interval One Time

Start Date

End Date

Blackout Periods

| Local Start Time | Local End Time | Actual Start Time | Actual End Time |
|------------------|----------------|-------------------|-----------------|
| Sunday 00:00     | Monday 00:00   | Sunday 00:00      | Monday 00:00    |
| Monday 00:00     | Monday 04:00   | Monday 00:00      | Monday 04:00    |
| Friday 21:00     | Saturday 00:00 | Friday 21:00      | Saturday 00:00  |
| Saturday 00:00   | Sunday 00:00   | Saturday 00:00    | Sunday 00:00    |

Notification None

Offline Status Offline

Online Status Available

Reason

Cancel Save

The screen will expand to display the Outage Editor screen including the Blackout Period, if defined for the Item associated SLA. Within the table the start and end time is displayed as Local Time and Actual Time:

- ◆ Local Time is based on the time zone of the logged in User
- ◆ Actual Time is based on the SLA time zone.

7. Define the Interval for the Outage

Select One Time if the Outage is a one off, or set regular outages based on a weekly or monthly basis.

8. Enter the Outage details

Select the Start/End Date within the calendar, and modify the Time accordingly inside the calendar pop-up.

9. Set the Notification method and recipients, for when the Outage is saved.

10. Tick the Reminder Email field, if a reminder is to be emailed to defined recipients prior to the Outage time

11. Define the length of time before the Outage occurs that the reminder is to be sent

Notification: Email, Primary Contacts  
 Reminder Email:  24 hours before outage.

12. Complete the Reason for the Outage

13. Click Save.

The Outage notification is sent to the defined recipients upon save.

See [Outages](#) for more information on setting up and viewing Item Outages.

## Item Audit Trail

The Audit Trail tab records all changes that are made to fields within the Item Information and Details screens. These entries are made to record all the alterations made to Items and the CMDB.

To view an audit trail entry, under the Item Details tab:

1. Select the Audit Trail tab
2. Click on the identification number hyperlink to display the entry details.

| No. | Date           | Event   | By                |
|-----|----------------|---|-------------------|
| 550 | 05/09/12 11:32 | Item has been added to outage 10                      | Simone Supervisor |
| 53  | 04/03/12 14:58 | Delegate Costs changed from '' to 'no'                | Simone Supervisor |
| 40  | 07/26/11 17:09 | Relationship created. Service Desk #100002 is a ch... | Simone Supervisor |
| 38  | 07/26/11 17:09 | Relationship created. Service Desk #100002 is a ch... | Simone Supervisor |
| 35  | 07/26/11 17:08 | Relationship deleted. Blade Server #100004 is a pa... | Simone Supervisor |

1 - 5 of 15 Results

## Rollback Option

All changes recorded in the Audit Trail can be rolled back to reinstate information recorded against an Item.

To return to Item details to previously saved information:

1. Click Edit
2. Select the identification number hyperlink of the entry to be reversed
3. Click the Rollback button
4. Save the Item.

The Item details will revert to information recorded before an update was made.

## 1.40.4 Costs

For Users who are not assigned the Finance Role, the Costs Tab displays SLA Details and Item Availability information. Users who are assigned the Finance Role, also have access to the Item's financial and contractual details. The following Item Costs details include:

- ♦ Base cost
- ♦ Purchase date and related information
- ♦ Depreciation data
- ♦ Inherited costs
- ♦ SLA and Contract details
- ♦ Availability statistics.

Completing the Depreciate Over field causes the application to automatically keep track of the Item depreciation over the specified number of years. The current value of the Item after depreciation is displayed at Depreciated Value. The Audit Date field is used to record the date when the Item was last audited.

For Service Items see: [Service Item Costs Tab](#)

The screenshot displays the 'Item Information' window for 'Item # 100005 (Server)'. The 'Costs' tab is selected, showing the following details:

| Financial             |                |
|-----------------------|----------------|
| Cost                  | \$0.00         |
| Monthly Cost          | \$0.00         |
| Purchase Date         | 08/01/10 19:03 |
| Depreciate Over       | years          |
| Depreciated Value     | \$0.00         |
| Audit Date (mm/dd/yy) |                |
| PO Number             |                |

| SLA Details   |          |
|---------------|----------|
| Service Level | Warranty |

| Warranty |  |
|----------|--|
| Expires  |  |

| Availability     |     |
|------------------|-----|
| Avg Repair Time  | N/A |
| Avg Time To Fail | N/A |

| Inherited Costs   |   |
|-------------------|---|
| Inherited Capital |   |
| Inherited Ongoing |   |
| Delegate Costs    | <input type="radio"/> Yes <input checked="" type="radio"/> No |

Buttons: Edit, Duplicate, Print, Done. Item # 100005 (Server) is displayed in the top right corner.

The Financial Costs and Inherited Costs fields allow the support organization to assign costs across related Items and charge Users and/or Organizational Units appropriately.

| <b>Financial</b>  | <b>Description</b>  |
|-------------------|---|
| Cost              | The financial investment made to purchase the Item. This figure is also used when the Delegate Costs is enabled for allocating costs across related Items.  |
| Monthly Cost      | The amount invested on a monthly basis to maintain the running of an Item. This figure is also used when the Delegate Costs option is enabled for allocating costs across related Items.  |
| Purchase Date     | The date the Item was purchased.  |
| Depreciate Over   | Enter the number of years the Item is to be depreciated over, if required.  |
| Depreciated Value | The system calculates the current value of the Item based on the Purchase Date and the number of years the Item is to be Depreciated Over.  |
| Audit Date        | Set the date the Item is next to be audited.  |
| PO Number         | If Purchase Orders are enabled for the system, the field is visible and automatically populated with the PO number generated by a User within the Finance>Purchase Orders tab, when the Item order was recorded in the system.  |
| Inherited Costs   |   |
| Inherited Capital | Total infrastructure costs of parent CI's that directly contribute to the cost of the current CI. This figure is derived from all the Cost fields within the Item Information>Costs tab of related Parent Items.  |
| Inherited Ongoing | Running costs of all associated Items that enable the current CI to continue to function. This figure is derived from all the Monthly Cost fields within the Item Information>Costs tab of related Parent Items.  |
| Delegate Costs    | <p>To enable cost delegation across the relationship map allowing associated Items to inherit the costs of the current CI, select Yes. This will take the figures from the Cost and Monthly Cost fields for the Item and spread them across related Child Items.</p> <p>Define the technique to be used to evaluate the cost split:</p> <p><i>Child Count:</i> Costs are split by percentage based on the number of child CI's the costs are being delegated across.</p> <p><i>User Count:</i> Costs are split proportionally based on the number of users of the child CI's the costs are being delegated across.</p> <p><i>Custom %:</i> The relationship itself allows for the % cost to be assigned</p> |

The figures displayed within the Availability fields are automatically calculated by the application, using the Item Lifecycle as it moves between online and offline States:

---

## Availability

---

Avg Repair Time

Entries displayed here are automatically calculated based on the average length of time an Item is offline.

Avg Time To Fail

Figures displayed here are automatically calculated based on the average time between an Item being offline.

---

## Billing Enabled

When Billing is enabled, a Service Level hyperlink is available within the Costs screen. This provides access to the Service Level Agreement details that govern the lifecycle for Requests logged against the Item.

The screenshot displays the 'Item Information' window for 'Item # 100009 (Oracle 11g)'. The 'Costs' tab is active, showing financial and contract information.

**Financial**

- Cost: \$0.00
- Monthly Cost: \$0.00
- Purchase Date: 05/20/11 09:44
- Depreciate Over: years
- Depreciated Value: \$0.00
- Audit Date (mm/dd/yy)
- PO Number

**Inherited Costs**

- Inherited Capital
- Inherited Ongoing
- Delegate Costs:  Yes  No

**Contract**

- Service Level: [Gold](#)
- Contract #: 6
- Invoice #: [100007](#)
- Start Date: 05/23/11
- End Date: 05/31/12
- Expires: 1 Year 9 Days

**Availability**

- Avg Repair Time: N/A
- Avg Time To Fail: N/A

**Contracts Table**

| Contract # | Type     | SLA  | Invoice # | Start Date     | End Date       |
|------------|----------|------|-----------|----------------|----------------|
| 6          | Per Item | Gold | 100007    | 05/23/11 00:02 | 05/31/12 23:59 |

1 - 1 of 1 Results

Done

If Invoices are also enabled, an Invoice Number hyperlink is available and when selected, will display the invoice details for the Contract that covers the Item. The Start Date and End Dates stipulate the contract length covered for the Item. It is summarized by the days or hours recorded in the Expires field.

The Contract tab within the Item Information Costs tab summarizes the contract details that cover the Item. Further Contract details can be found within the relevant Contract Number within the Finance>Invoices screen.

## Create a Contract

Through the Item Costs tab, Contracts with an associated Invoice Number (if relevant) can be generated for an Item, after it has been logged in the system.

To add a Contract to an Item, within the Configuration>Item screen:

1. Select the Item Number

2. Move to the Costs tab

The Contracts tab is visible in the bottom right corner of the screen

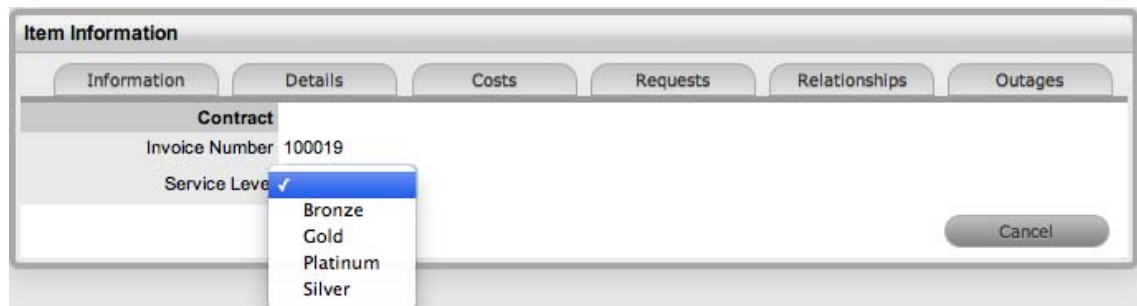
3. Click Edit

The Add and Delete buttons are made available within the Contracts tab



4. Click Add

(If Invoices are enabled in the system, an Invoice number will be automatically generated and assigned to the Contract).



5. Select an SLA from the drop-down option

The screen will display the SLA details and the Contract Type locked to Per Item.

**Item Information**

Information Details Costs Requests Relationships Outages

**Contract**

Invoice Number 100019  
Service Level Bronze

| Priority | Response Time | Restoration Time | Resolution Time | 24 x 7 support | Alert  |
|----------|---------------|------------------|-----------------|----------------|--------|
| Urgent   | 12 Hours      | 24 Hours         | 36 Hours        | No             | Action |
| High     | 24 Hours      | 26 Hours         | 60 Hours        | No             | Action |
| Medium   | 30 Hours      | 48 Hours         | 84 Hours        | No             | Action |
| Low      | 36 Hours      | 60 Hours         | 108 Hours       | No             | Action |

Contract Type Per Item  
Time  Subscription  
Time Limited Subscription  
Support Hours  
Support Hours By Month

Start Date  
End Date 03/07/13 12:00

Notes

Price \$160.00  
Tax \$0.00  
Taxable   
Total Cost \$160.00

Cancel Save

6. Assign the Time period to be covered by the Contract:

If *Subscription* is selected, the Start and End Dates are automatically completed by the system, but can be edited if required.

If *Time Limited Subscription* is selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually, entering the length of time for the subscription period.

If *Support Hours* is selected, the number of support hours purchased by the Customers should be entered.

If *Support Hours by Month* is selected, set the number of hours purchased per month and define which day of the month contract is to rollover to start the new month. The Total Support Hours will automatically be calculated based on the Start and End Dates set for the Contract.

(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned. See [Pending Contracts](#).)

7. Add any relevant Invoice Notes

8. Check the Taxable box, if the Contract is to be taxed

9. Click Save.

If Invoices are enabled in the system, an Invoice number will be automatically generated for the Contract and made available within Finance>Invoices. Payment will need to be processed by a Finance User before the Contract can be enabled in the system. If invoice payment is required before the contract can be enabled in the system the following Warning message is displayed:



## Warning

The invoice has been generated against this item with status "Pending Unpaid". Technicians will not be able to work with this item until the invoice has been paid.

### 10. Click Next

The Contracts information is only populated after the Invoice has been processed. To process the Invoice, as a Finance User move to the Finance>Invoices tab. Once the relevant Invoice payment has been processed the Contract details will be visible in the Costs >Contracts tab.

**Item Information**

Information Details Costs Requests Relationships Outages

Edit Duplicate Print

**Item # 100004 (Blade Server)**

**Financial**

- Cost \$10,000.00
- Monthly Cost \$0.00
- Purchase Date 06/30/10 16:44
- Depreciate Over 5 years
- Depreciated Value \$6,295.89
- Audit Date (mm/dd/yy)
- PO Number

**Inherited Costs**

- Inherited Capital
- Inherited Ongoing
- Delegate Costs  Yes  No
- Strategy User Count

**Contract**

- Service Level Bronze
- Contract # 9
- Contract Type Subscription
- Invoice # 100019
- Start Date 05/07/12
- End Date 05/07/13
- Expires 1 Year 0 Day

**Warranty**

- Expires

**Availability**

- Avg Repair Time N/A
- Avg Time To Fail N/A

Contracts

| Contract # | Type     | SLA    | Invoice # | Start Date     | End Date       |
|------------|----------|--------|-----------|----------------|----------------|
| 9          | Per Item | Bronze | 100019    | 05/07/12 00:00 | 05/07/13 23:59 |

1 - 1 of 1 Results

Done

## 1.40.5 Requests

This section lists all the requests that have been logged against an Item. For Technician Users, this tab is only visible to when the View All Requests option is enabled in the Setup>Privileges>User tab.

Use the system list filter to display the relevant type of request or task. To expand and view the request in full, select the Task # or Problem Report hyperlink.

**Item Information**

Information Details Costs Requests Relationships

**Item # 100003 (Oracle 11g)**

Incidents [sys] ↓

| Task # | Process  | Date           | Status  | Technician  | Problem Report   |
|--------|----------|----------------|---------|-------------|--|
| 100050 | Incident | 06/26/11 18:16 | Pending | System User | Cannot access items hosted on this server on the network |

1 - 1 of 1 Results

Done



## 1.40.6 Item Relationships

This Relationship Tab allows Users to view and/or create a Relationship Map for the current Item, with other Items within the CMDB.

The Relationship direction can be defined as:

- ♦ Service Oriented - Parent-Child Relationship
- ♦ Component Oriented - Child-Parent Relationship.

Within each view the Relationship Class can be defined as:

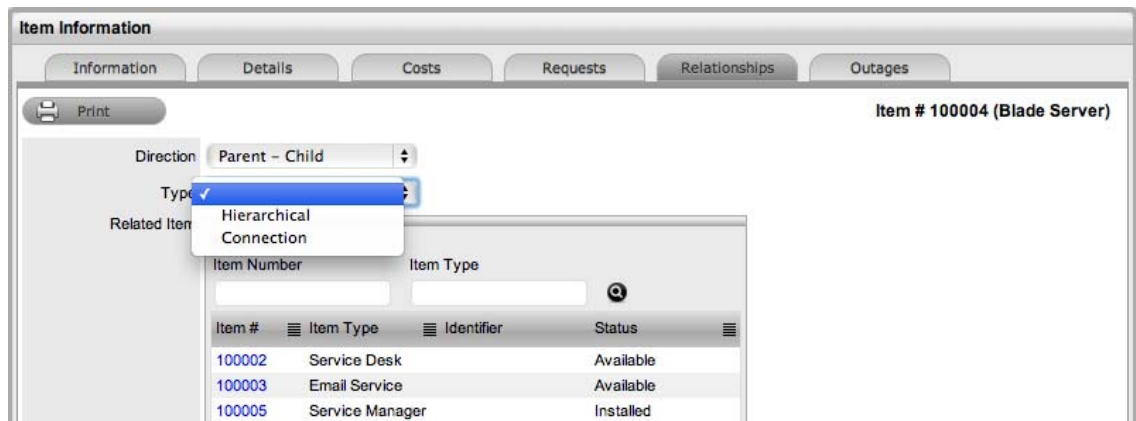
- ♦ Hierarchical Relationship
- ♦ Connection - an association between the selected Items.

For a Service, such as the Email or Web Site Service, it is recommended that the Hardware be defined as the Parent for the Software Items and the Software be defined as the Parent of the Email or Web Site Service.

### Create a Relationship

To create a new Item Relationship:

1. Select Configuration>Items
2. Select an Item
3. Select the Item's Relationship tab
4. Click Edit
5. Click New
6. Select the Relationship Direction and Class from the drop-down menus
7. Define the Relationship by selecting a description from the drop-down list



8. **NOTE:** If the Relationship Type has the Inherit Parent Ownership option enabled, Child Items that use this relationship will inherit the Parent Item's owners. The ownership will not be editable and no other Parent Item can be assigned to the Child Item. A warning will be displayed if a relationship type has the Inherit Parent Ownership option enabled.
9. Use the Find Item field to locate the relevant Item

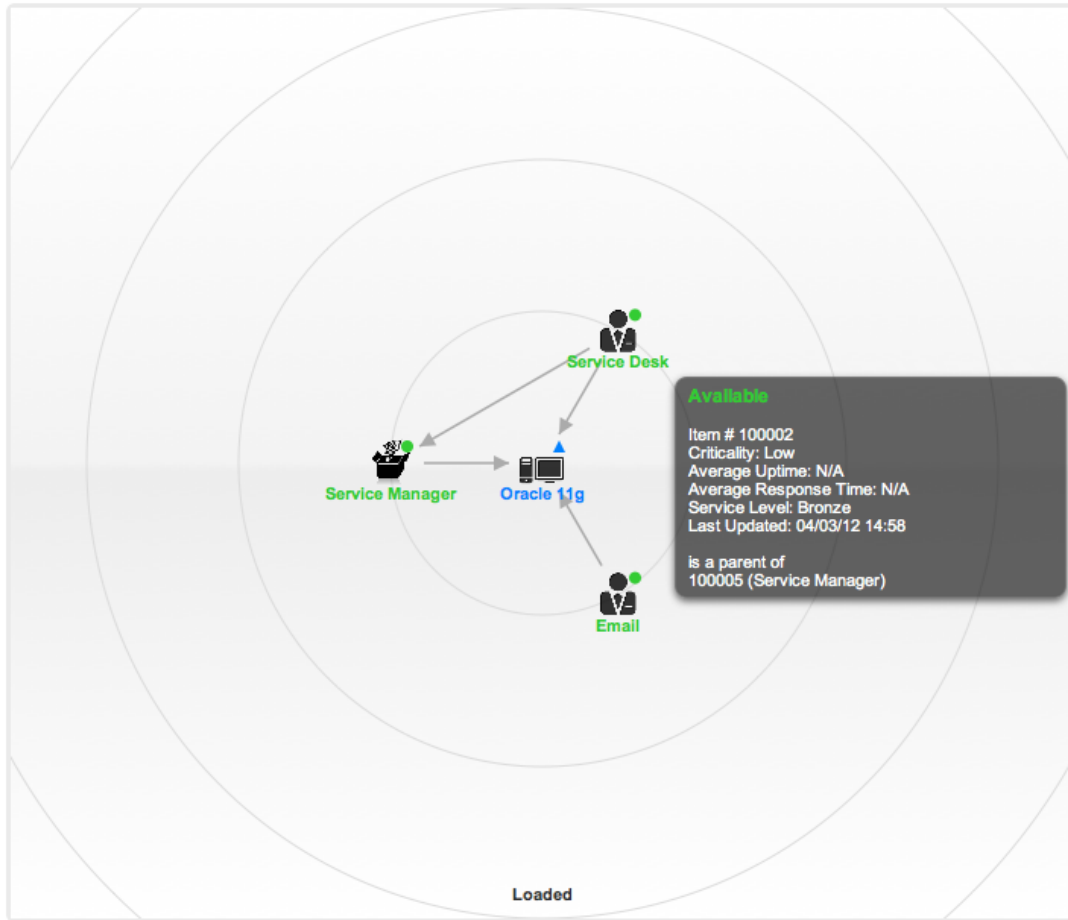
10. Click on the Item Number hyperlink to create the Relationship
11. Click Save to default to the Relationship Map view.

## Relationship Map

Within the Relationships tab of the Item Information screen, a Relationship Map visually displays the connections that have been defined for an Item. All Item Relationships are listed in the Relationships Table beneath the Map. The Relationship Map can display up to 48 Child Items and 16 Parent Items in the one diagram.

The central icon of a Map is a visual representation of the selected Item. Scroll over an Item label to view any information recorded on the Information and Details tabs of the Item. To drill-down through the relationships, click on an Item label. To change the focus of the Relationship Map to another Item, click on the Item label and the system will request that OK be selected before updating the central node of the Map.

The Relationship Table data displayed at the base of the map can be filtered using the Direction filter view of Parent-Child or Child-Parent.



Direction: Parent - Child

| Relationships | Current Item | Relationship   | Related Item    | Item # | Category | Cost Split % |
|---------------|--------------|----------------|-----------------|--------|----------|--------------|
|               | Oracle 11g   | is host of     | Service Manager | 100005 | Software | N/A          |
|               | Oracle 11g   | is a parent of | Service Desk    | 100002 | Service  | N/A          |
|               | Oracle 11g   | is host of     | Email           | 100003 | Service  | N/A          |

The map displays the relationship between each Lifecycle State by using different colors to represent the type of Lifecycle State.

**Color**

- Green Circle CI is assigned an online status.
- Red Square CI is assigned an offline status.
- Blue Triangle Service CI is assigned a pre-production status.

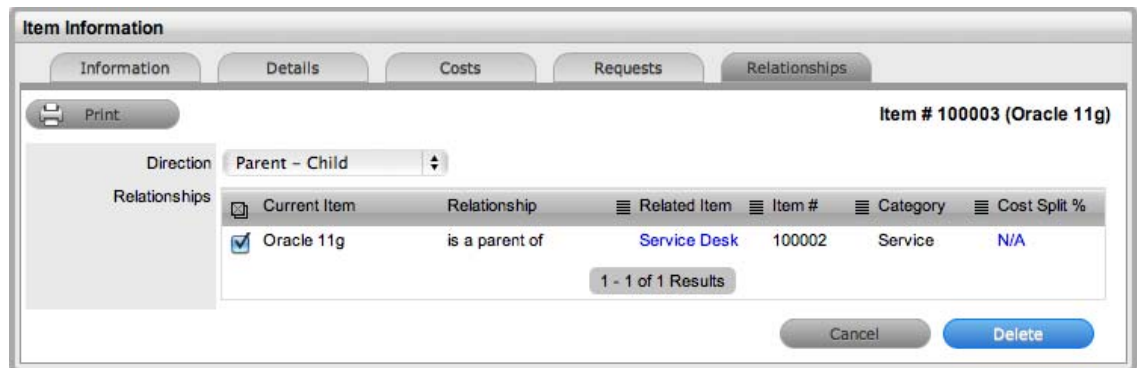
The Lifecycle State name can be accessed by scrolling over the Item icon within the Map.

## To delete a Relationship:

To remove the Relationship between Items:

1. Select the relevant Item within the Configuration tab
2. Move to the Relationships tab
3. Click Edit
4. Select Delete

A table with the Relationship details is displayed.



5. Select the Relationship Direction to display the relevant Relationship table
6. Mark the checkbox next to the Relationship that is to be removed
7. Select Delete
8. Click Done to return to the Item list.

Users can view and create relationship maps for current Item with other Items within the CMDB within the Relationships tab to define the infrastructure that underpins Services within the Service Catalog. For more information about creating a Service catalog and relationship mapping, see: [Service catalog](#).

## AMIE Item Imports and Relationships

Items with Item relationships that have been imported using the AMIE engine, retain the relationships that exist within the Asset Management Tool. A visible map of the relationships is recorded within the Relationships tab.

## 1.41 Create an Item

When an Item is created within the system it takes the generic settings of an Item Type and binds them to a Customer or Customers and/or Organizational Unit. The Item information uses the details defined in the [Item Type](#) template, however these can be adjusted to suit the requirements of the specific Item.

To create an Item:

1. Select Configuration > Items
2. Click New

The Item Information screen appears

\*Denotes mandatory fields.

3.

| Item         | Description  |
|--------------|--|
| Item Number* | <p>If the Administrator has set the Item Numbers Editable option in Setup&gt; Privileges&gt; System to Yes, the User will have the option of entering a customized Item number. It may contain numbers and/or letters, and be between 1 and 64 characters in length.</p> <p>As no two Item Numbers can be the same, the User will be prompted to change the value they have entered if it is already in use. If the Item Number field is left blank, the system will automatically create an Item Number.</p> <p>If the Administrator has set the Item Numbers Editable option to No, an Item Number will be generated automatically and cannot be edited.</p> |
| Category*    | This is auto-filled, based on the assigned Item Type.  |
| Type*        | This is the Item Type that the Item represents. Click the Search button to view the list of available Item Types.  |
| Team*        | This is the Technician Team that will be assigned to support the Item.   |
| Status*      | Select the status from the drop-down options displayed after the Item Type has been assigned.  |

| Item          | Description   |
|---------------|---|
| Criticality*  | Rates the degree of importance of an Item Type within an organization. The 'Impact' of a request is initially pulled from the Criticality of the Item, but can be adjusted within the request Information screen if required. Requests logged through the Customer Portal, use the Criticality of the Item to determine the Priority of the request. (See additional information below.)  |
| Service Level | Select the Service Level Agreement from the drop-down list, if required.  |
| Ownership     | <p>These are the Customers who own the Item. A single Customer, a group of Customers or all Customers in the application can be assigned to an Item.</p> <ol style="list-style-type: none"> <li>1. Enter a Customer last name, or leave blank then click the Search button to view a list of all available Customers.</li> <li>2. Click on the hyperlink for the relevant Customer name or names to assign them to the Item.</li> </ol> <p>If no specific Customer is allocated to the Item, it becomes a Global Item and is assigned to Everyone.</p>  |
| Org Units     | <p>These are the Org Units who own the Item. The Item can be assigned to one or multiple Organizational Units.</p> <p>To assign an Org Unit:</p> <ol style="list-style-type: none"> <li>1. Enter an Org Unit name, or leave blank then click the Search button to view a list of available Org Units.</li> <li>2. Click on the hyperlink for the relevant Org Unit name or names to assign them to the Item.</li> <li>3. <b>NOTE:</b> If Billing is enabled an owner must be assigned to the Item. The owner can be either a Customer or an Org Unit, but only Org Units that have a Primary Contact, will be displayed in the Org Unit Search list. (See: <a href="#">Primary Contact</a>.)</li> </ol> |
| Notification  | <p>This field is visible when an active Item moves into an offline State and allows the User to define who (Primary Contact or All Owners of the Item) and how (Email or SMS), Customers will be notified that the Item is not available.</p>   |

4. Search and select an Item Type
5. Define a support Team for each process

6. Select the Item's Status and Criticality  
(Refer below for further details about Item Criticality.)
7. Assign a Service Level  
If Contracts are enabled for the system, the assignment of an SLA will result in an annual service contract automatically being applied to the Item. If an SLA is not assigned, a Contract can be created for the Item within the Costs tab.
8. Search and select a Customer and/or an Organizational Unit owner
9. Click Next to view the Details tab

## 1.41.1 Item Criticality

The Item Criticality is used to identify the degree of importance of an Item to an Organization.

When the Incident Priority is set to Derived in the Administrator Setup, the Impact of a request is mapped from the Criticality of the Item associated with the request and then combined with the selected Urgency, which derives the Priority of the request. If required, the Impact can be manually adjusted within the request Information screen. Requests logged through the Customer Portal, use the Criticality of the Item to determine the Priority of the request, which can be manually adjusted by the Technician User.

The following table displays the calculations applied by the system to the Item Criticality, which is mapped to a request's Impact to determine a request's Priority:

| Impact / Urgency | Urgent | High  | Moderate | Low   | Very Low |
|------------------|--------|-------|----------|-------|----------|
| Critical         | 1.000  | 0.850 | 0.700    | 0.550 | 0.410    |
| High             | 0.850  | 0.723 | 0.595    | 0.468 | 0.349    |
| Moderate         | 0.700  | 0.595 | 0.490    | 0.385 | 0.287    |
| Low              | 0.550  | 0.468 | 0.385    | 0.303 | 0.226    |
| Very Low         | 0.410  | 0.349 | 0.287    | 0.226 | 0.168    |

The above calculations result in the following Priorities:

| Priority | Upper | Lower |
|----------|-------|-------|
| Urgent   | 1     | 0.83  |
| High     | 0.83  | 0.58  |
| Medium   | 0.58  | 0.34  |
| Low      | 0.34  | 0     |

The Incident Analyzer, if enabled by the Administrator in Setup>CMS>Incident Analyzer, can apply the Criticality to automatically detect Problems. The minimum Criticality level can also be used to determine which off-line Items are displayed on the Outages pages, when the Outages pages are enabled by the Administrator in Setup>Privileges>System.

## 1.42 Costs Tab

For Users who are not assigned the Finance Role, the Costs Tab displays SLA Details and Item Availability information. Users who are assigned the Finance Role, also have access to the Item's financial and contractual details. The following Item Costs details include:

- ◆ Base cost

- ◆ Purchase date and related information
- ◆ Depreciation data
- ◆ Inherited costs
- ◆ SLA and Contract details
- ◆ Availability statistics.

Completing the Depreciate Over field causes the application to automatically keep track of the Item depreciation over the specified number of years. The current value of the Item after depreciation is displayed at Depreciated Value. The Audit Date field is used to record the date when the Item was last audited.

For Service Items see: [Service Item Costs Tab](#)

The Financial Costs and Inherited Costs fields allow the support organization to assign costs across related Items and charge Users and/or Organizational Units appropriately.

| Financial         | Description  |
|-------------------|--|
| Cost              | The financial investment made to purchase the Item. This figure is also used when the Delegate Costs is enabled for allocating costs across related Items.                               |
| Monthly Cost      | The amount invested on a monthly basis to maintain the running of an Item. This figure is also used when the Delegate Costs option is enabled for allocating costs across related Items. |
| Purchase Date     | The date the Item was purchased.   |
| Depreciate Over   | Enter the number of years the Item is to be depreciated over, if required.   |
| Depreciated Value | The system calculates the current value of the Item based on the Purchase Date and the number of years the Item is to be Depreciated Over.   |
| Audit Date        | Set the date the Item is next to be audited.   |



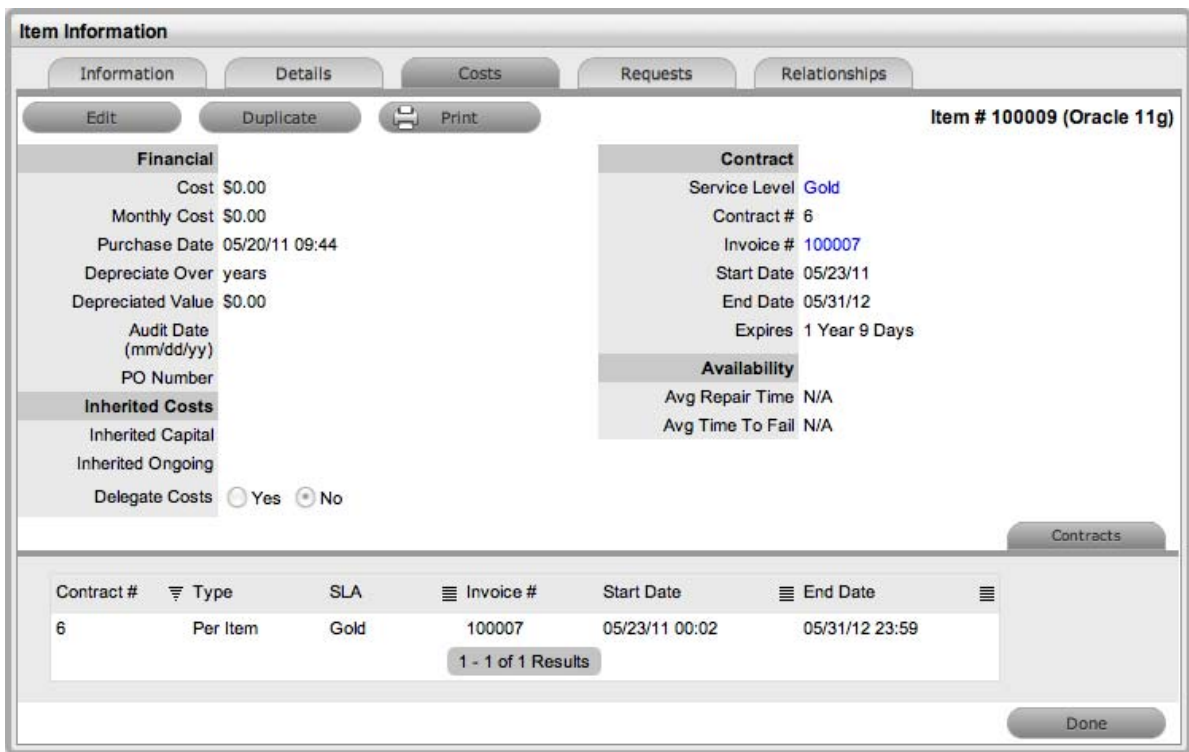
| <b>Financial</b>  | <b>Description</b>  |
|-------------------|---|
| PO Number         | If Purchase Orders are enabled for the system, the field is visible and automatically populated with the PO number generated by a User within the Finance>Purchase Orders tab, when the Item order was recorded in the system.  |
| Inherited Costs   |   |
| Inherited Capital | Total infrastructure costs of parent CI's that directly contribute to the cost of the current CI. This figure is derived from all the Cost fields within the Item Information>Costs tab of related Parent Items.  |
| Inherited Ongoing | Running costs of all associated Items that enable the current CI to continue to function. This figure is derived from all the Monthly Cost fields within the Item Information>Costs tab of related Parent Items.  |
| Delegate Costs    | <p>To enable cost delegation across the relationship map allowing associated Items to inherit the costs of the current CI, select Yes. This will take the figures from the Cost and Monthly Cost fields for the Item and spread them across related Child Items.</p> <p>Define the technique to be used to evaluate the cost split:</p> <p><i>Child Count:</i> Costs are split by percentage based on the number of child CI's the costs are being delegated across.</p> <p><i>User Count:</i> Costs are split proportionally based on the number of users of the child CI's the costs are being delegated across.</p> <p><i>Custom %:</i> The relationship itself allows for the % cost to be assigned</p> |

The figures displayed within the Availability fields are automatically calculated by the application, using the Item Lifecycle as it moves between online and offline States:

| <b>Availability</b> |  |
|---------------------|--|
| Avg Repair Time     | Entries displayed here are automatically calculated based on the average length of time an Item is offline.  |
| Avg Time To Fail    | Figures displayed here are automatically calculated based on the average time between an Item being offline. |

## 1.42.1 Billing Enabled

When Billing is enabled, a Service Level hyperlink is available within the Costs screen. This provides access to the Service Level Agreement details that govern the lifecycle for Requests logged against the Item.



If Invoices are also enabled, an Invoice Number hyperlink is available and when selected, will display the invoice details for the Contract that covers the Item. The Start Date and End Dates stipulate the contract length covered for the Item. It is summarized by the days or hours recorded in the Expires field.

The Contract tab within the Item Information Costs tab summarizes the contract details that cover the Item. Further Contract details can be found within the relevant Contract Number within the Finance>Invoices screen.

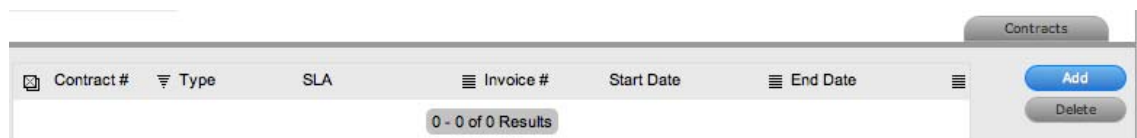
## 1.42.2 Create a Contract

Through the Item Costs tab, Contracts with an associated Invoice Number (if relevant) can be generated for an Item, after it has been logged in the system.

To add a Contract to an Item, within the Configuration>Item screen:

1. Select the Item Number
2. Move to the Costs tab
  - The Contracts tab is visible in the bottom right corner of the screen
3. Click Edit

The Add and Delete buttons are made available within the Contracts tab



4. Click Add

(If Invoices are enabled in the system, an Invoice number will be automatically generated and assigned to the Contract).

The screenshot shows the 'Item Information' window with the 'Contract' section selected. The 'Service Level' dropdown menu is open, showing options: Bronze, Gold, Platinum, and Silver. The 'Invoice Number' is 100019. A 'Cancel' button is visible in the bottom right corner.

5. Select an SLA from the drop-down option

The screen will display the SLA details and the Contract Type locked to Per Item.

The screenshot shows the 'Item Information' window with the 'Contract' section selected. The 'Service Level' is set to 'Bronze'. A table displays SLA details for Priority, Response Time, Restoration Time, Resolution Time, and 24 x 7 support Alert. The 'Contract Type' is 'Per Item' and the 'Time' dropdown is open, showing options: Subscription, Time Limited Subscription, Support Hours, and Support Hours By Month. The 'Price' is \$160.00, 'Tax' is \$0.00, and 'Total Cost' is \$160.00. 'Cancel' and 'Save' buttons are at the bottom right.

| Priority | Response Time | Restoration Time | Resolution Time | 24 x 7 support | Alert  |
|----------|---------------|------------------|-----------------|----------------|--------|
| Urgent   | 12 Hours      | 24 Hours         | 36 Hours        | No             | Action |
| High     | 24 Hours      | 26 Hours         | 60 Hours        | No             | Action |
| Medium   | 30 Hours      | 48 Hours         | 84 Hours        | No             | Action |
| Low      | 36 Hours      | 60 Hours         | 108 Hours       | No             | Action |

6. Assign the Time period to be covered by the Contract:

If *Subscription* is selected, the Start and End Dates are automatically completed by the system, but can be edited if required.

If *Time Limited Subscription* is selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually, entering the length of time for the subscription period.


If *Support Hours* is selected, the number of support hours purchased by the Customers should be entered.

If *Support Hours by Month* is selected, set the number of hours purchased per month and define which day of the month contract is to rollover to start the new month. The Total Support Hours will automatically be calculated based on the Start and End Dates set for the Contract.

(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned. See [Pending Contracts](#).)

7. Add any relevant Invoice Notes
8. Check the Taxable box, if the Contract is to be taxed
9. Click Save.

If Invoices are enabled in the system, an Invoice number will be automatically generated for the Contract and made available within Finance>Invoices. Payment will need to be processed by a Finance User before the Contract can be enabled in the system. If invoice payment is required before the contract can be enabled in the system the following Warning message is displayed:

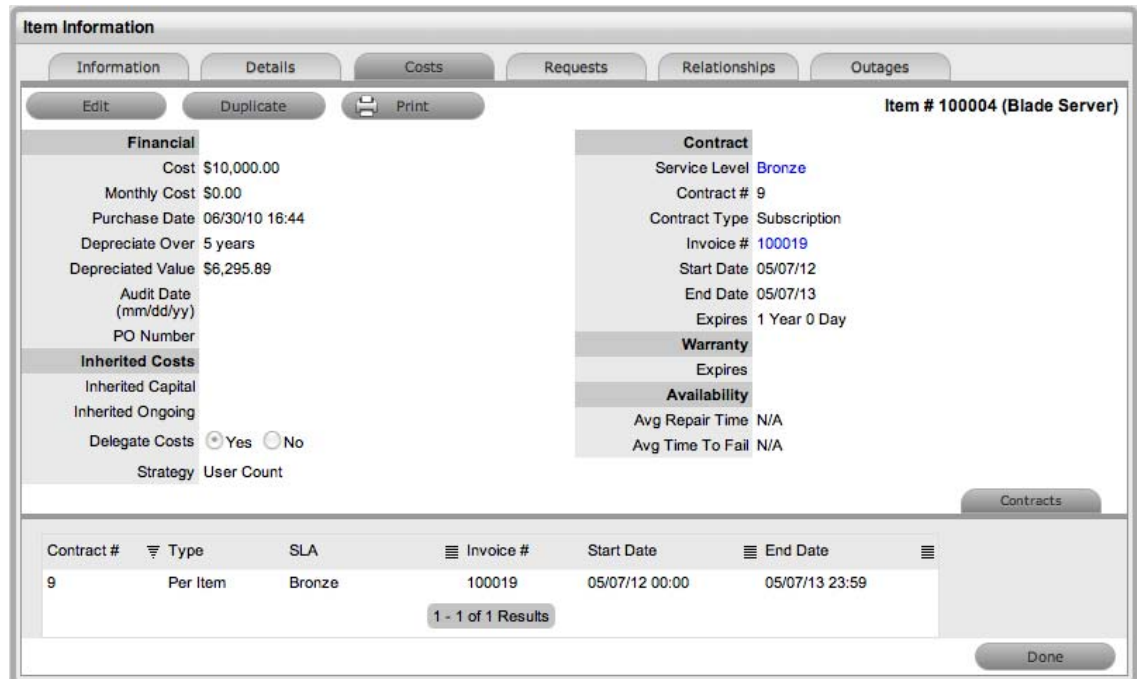


**Warning**

The invoice has been generated against this item with status "Pending Unpaid". Technicians will not be able to work with this item until the invoice has been paid.

10. Click Next

The Contracts information is only populated after the Invoice has been processed. To process the Invoice, as a Finance User move to the Finance>Invoices tab. Once the relevant Invoice payment has been processed the Contract details will be visible in the Costs >Contracts tab.



**Item Information**

Information   Details   **Costs**   Requests   Relationships   Outages

Edit   Duplicate   Print   **Item # 100004 (Blade Server)**

| Financial             |  | Contract         |              |
|-----------------------|--|------------------|--------------|
| Cost                  | \$10,000.00  | Service Level    | Bronze       |
| Monthly Cost          | \$0.00   | Contract #       | 9            |
| Purchase Date         | 06/30/10 16:44                                     | Contract Type    | Subscription |
| Depreciate Over       | 5 years  | Invoice #        | 100019       |
| Depreciated Value     | \$6,295.89   | Start Date       | 05/07/12     |
| Audit Date (mm/dd/yy) |  | End Date         | 05/07/13     |
| PO Number             |  | Expires          | 1 Year 0 Day |
| Inherited Costs       |  | Warranty         |              |
| Inherited Capital     |  | Expires          |              |
| Inherited Ongoing     |  | Availability     |              |
| Delegate Costs        | <input type="radio"/> Yes <input type="radio"/> No | Avg Repair Time  | N/A          |
| Strategy              | User Count   | Avg Time To Fail | N/A          |

| Contract # | Type     | SLA    | Invoice # | Start Date     | End Date       |
|------------|----------|--------|-----------|----------------|----------------|
| 9          | Per Item | Bronze | 100019    | 05/07/12 00:00 | 05/07/13 23:59 |

1 - 1 of 1 Results

Contracts   Done

## 1.43 Requests Tab

This section lists all the requests that have been logged against an Item.

Use the system list filter to display the relevant type of request or task. To expand and view the request in full, select the Task # or Problem Report hyperlink.



## 1.44 Outages Tab

Planned outages can be created for an Item under the Outages tab. This is a period of time an Item will not be available for a Customer's use.

If an Item has an SLA with a specified Blackout Period, Outages should be planned to fall within this time. The Blackout Period is an agreement between the Customer and the Service Desk regarding a period of time when the Customer has no service expectations. This can also be the preferred time for Item upgrades and maintenance without affecting service availability.

When an Outage is being created, the Blackout Periods times are displayed to ensure the User creates a new Outage that does not breach the Item's SLA.

### 1.44.1 Creating an Outage

To create an Outage:

1. Select Configuration > Items
2. Select the Item Number
3. Go to the Outages tab
4. Click Edit



5. Click New

**Item Information**

Information Details Costs Requests Relationships Outages

**Details**

Interval: One Time

Start Date:

End Date:

| Local Start Time | Local End Time | Actual Start Time | Actual End Time |
|------------------|----------------|-------------------|-----------------|
| Sunday 00:00     | Monday 00:00   | Sunday 00:00      | Monday 00:00    |
| Monday 00:00     | Monday 04:00   | Monday 00:00      | Monday 04:00    |
| Friday 21:00     | Saturday 00:00 | Friday 21:00      | Saturday 00:00  |
| Saturday 00:00   | Sunday 00:00   | Saturday 00:00    | Sunday 00:00    |

Notification: None

Offline Status: Offline

Online Status: Available

Reason:

Cancel Save

The screen will expand to display the Outage Editor screen including the Blackout Period, if defined for the Item associated SLA.

---

### Planned Outages

---

| Details      | Description   |
|--------------|---|
| Interval     | Select One Time if the Outage is a one off, or set regular outages based on a weekly or monthly basis.  |
| Start Date   | Select the Start Date within the calendar, and modify the Time accordingly inside the calendar pop-up.  |
| End Date     | Select the End Date within the calendar, and modify the Time accordingly inside the calendar pop-up.  |
| Notification | Select Email or SMS Notification about the Outage is to be sent to the Primary Contact of the Org. Unit, or All Customers/Owners associated with the Item.  |
| Reminder     | This option is displayed when a Notification is set for the Outage.<br><br>If a Reminder notification is to be applied to the Outage, check the box and define the period of time prior to the Planned Outage period that the reminder is to be issued. |

---

---

## Planned Outages

---

|        |   |
|--------|---|
| Reason | Enter a description that details why a Planned Outage is being scheduled. |
|--------|---|

---

Within the table the Start and End Time is displayed as Local Time and Actual Time.

- ◆ Local Time is based on the time zone of the logged in User
- ◆ Actual Time is based on the SLA time zone.

### 6. Define the Interval for the Outage

Select One Time if the Outage is a one off, or set regular outages based on a weekly or monthly basis.

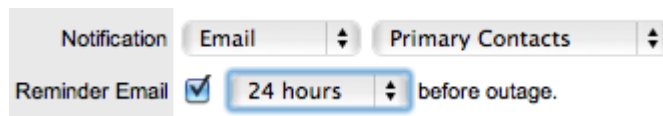
### 7. Enter the Outage details

Select the Start/End Date within the calendar, and modify the Time accordingly inside the calendar pop-up

### 8. Set the Notification method and recipients, for when the Outage is saved

### 9. Set Reminders, if required

Tick the Reminder Email field, if a reminder is to be emailed to defined recipients prior to the Outage time. Define the length of time before the Outage occurs that the reminder is to be sent.



The screenshot shows a configuration panel with the following elements:

- A "Notification" section with a dropdown menu set to "Email" and another dropdown menu set to "Primary Contacts".
- A "Reminder Email" section with a checked checkbox and a dropdown menu set to "24 hours", followed by the text "before outage."

### 10. Define the Offline Status and Online Status for the Item

These are the States the Item will be automatically assigned in the CMDB when the Planned Outage commences and ends.

### 11. Complete the Reason for the Outage

### 12. Click Save.

The Outage notification is sent to the defined recipients upon save.

### 13. Click Save and Done.

To view the details of the Outage, select the Outage No. link in the Outage List View.

See: [Outages](#) for more information on setting up and viewing Item Outages.

## 1.45 Searching for an Item

To search for Items in the CMDB use the Search button on the Configuration>Items screen.

To search for an Item:

1. Click



A search page is displayed with the options to search across the Team, Item Status, Manufacturers, Global Items, Item Ownership, Item Categories and Types. There is also the option for the search results to return deleted Item information.

**Search Items**

**Global Options**  Attributes  Full Text

Item No.

Team

Status  All  Active  Inactive

Manufacturer

Search Globals  All  Deleted Item Only

**Owner Options**

Last Name

Org. Unit

**Type Options**

Item Category

Item Type

Cancel Clear Search

2. Define any Item Attributes

To complete a Full Text search select that option and then enter relevant text in the Term field. (See: [Full text searches.](#))

3. Click



A list of Items will be displayed.

For an advanced search on specific Item details, it is necessary to enter the Item Category. When this is selected the Item search page will expand:



### 1.45.1 Tips on searching for an Item:

- ◆ Select the Deleted Items Only option to return a list of all Items that have been deleted in the system. To re-enable these deleted Items, once the search is executed, select the Item ID# followed by

- ◆ To search on an Item's Status, first select the Item Category
- ◆ To search on attribute fields of an Item, first select the Item Category
- ◆ To return a list of Items that are allocated to Customers or Org Units, select the Assigned Only option from the Search Globals drop-down list.

## 1.46 Full Text Search Options

A variety of search options, including the ability to search using terms or phrases, can be used to find information in the Knowledge Base or using any full text search fields included in system search screens. Search options include:

- ◆ A single character wildcard search using the ? symbol

- ♦ A multiple character wildcard search using the \* symbol
- ♦ A fuzzy search using the tilde, ~, symbol at the end of a single word. For example, to find words similar to roam, enter roam~ and this will return terms like foam and roams.

When searching using a phrase, the group of words need to be entered in the Text field within double quotation marks, for example, "user account access". Complex searches can be conducted using a combination of phrases or terms with boolean operators and all search results are relative to the Team assignment of the User or Item ownership for a Customer.

The boolean operators (i.e., AND, NOT, OR, +) must be entered as uppercase letters. For example:

- ♦ "user" OR "account" returns results related to either word
- ♦ "user" AND "account" returns results with both words
- ♦ "user" NOT "account" returns results including "user" but not "account"
- ♦ +user account returns results that must contain "user" and may contain "account"
- ♦ "user" -"account" returns results that contain "user" but not "account". (Same results as using NOT.)

To further control the boolean logic, more complex searches can be conducted. For example, to search for either "user" or "account" and "access", the search words would be entered as: (user OR account) AND access. This will return results where "access" must be included, while either term of "user" or "account" is found.

Fuzzy logic searches using the '~' (tilde) can be performed on a single word term with the '~' at the end of the word. A value between 0 to 1 can also be applied to the search, where the value closer to 1 ensures terms with higher similarity are matched. If a value is not defined, the default of 0.5 is applied to the search. For example, roam~ should return results with similar spelling, like foam and roams. The search term of roam~0.8 might return words like roams, roamed.

Wildcards can be used to replace single character '?' and multiple characters '\*' in search terms. For example, te?t, test\* or te\*t. Wildcards can not be used as the first character of a search.

Proximity searches can be used to find words in a phrase within a specific distance away from the entered search term. To conduct a proximity search use "~" at the end of the phrase. For example, "user account"~10 will search for results where the word user and account are within 10 words of each other.

Escape character searches are also supported in the system and include: + - & | ! ( ) { } [ ] ^ " ~ \* ? : \

An example of using escape characters when searching for (1+1):2, requires the search syntax of \ (1\+1\) \:2 to be entered. It should be noted that the '\' must be entered before the escape characters.

## 1.46.1 Field Searches

Within the system full text searches can be conducted on specific fields, these include:

| Search Screen  | Fields  |
|----------------|---|
| Request        | Subject, description, notes, attachments and solution.                      |
| Item           | Number, itemtype, category, attachments and notes.                          |
| Knowledge Base | Title, summary, body, attachments, itemtype, classification, and custom1-5. |

| Search Screen | Fields                                 |
|---------------|--|
| Forum         | Title, content and author (last name). |

To search on a specific field, within the Term or All Text field enter the name of the field to be searched on followed by a colon and the term or text. For example, if searching for a specific Title, the Term or All Text search field would be completed as follows for the various search types:

- ◆ single word search - title:canceled
- ◆ phrase search - title:"canceled ticket"
- ◆ multiple word search - title:canceled OR title:ticket.

## 1.47 Bulk Item Update

The new ownership details for multiple Items can be added using the Bulk button within the Items list view. This functionality allows Users to add one or more Customers or Organizational Units to multiple Items within one screen. If the Items have mixed ownership before the update, and these details are no longer relevant, the current ownership details need to be adjusted within each individual Item.

If Parent/Child Relationships are configured for the Items, only the Parent Items' ownership details can be updated. The related Child Items will automatically adopt the amended Parent ownership details.

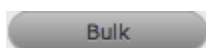
Multiple Items can also be deleted using the Bulk Item button.

To update multiple Items:

1. Go to Configuration > Items
  - The Items List View is displayed.
2. Check the boxes next to the Items numbers that need to be updated

| Item No.                                   | Item Category | Item Type       | Service Level | Customers | Org. Units | Status    | Purchased      | Incident Team | Problem Team | Change Team | Request Team |
|--|---------------|-----------------|---------------|-----------|------------|-----------|----------------|---------------|--------------|-------------|--------------|
| <input type="checkbox"/> 100008            | Service       | Service Desk    |               |           |            | Proposed  | 05/22/11 19:13 | Incident Team | Problem Team | Change Team | Request Team |
| <input checked="" type="checkbox"/> 100007 | Hardware      | Blade Server    |               |           |            | Arrived   | 05/22/11 18:30 | Incident Team | Problem Team | Change Team | Request Team |
| <input type="checkbox"/> 100006            | Software      | Service Manager |               | MyCompany |            | Installed | 05/03/11 00:19 | Incident Team | Problem Team | Change Team | Request Team |
| <input checked="" type="checkbox"/> 100005 | Hardware      | Blade Server    | Gold          |           | MyCompany  | Arrived   | 05/03/11 00:18 | Incident Team | Problem Team | Change Team | Request Team |

3. Click



The Bulk Update screen is displayed with the Details and Ownership fields available for amending. The only Owners displayed within the Ownership field, are those who are assigned ownership to all Items included in the bulk update.

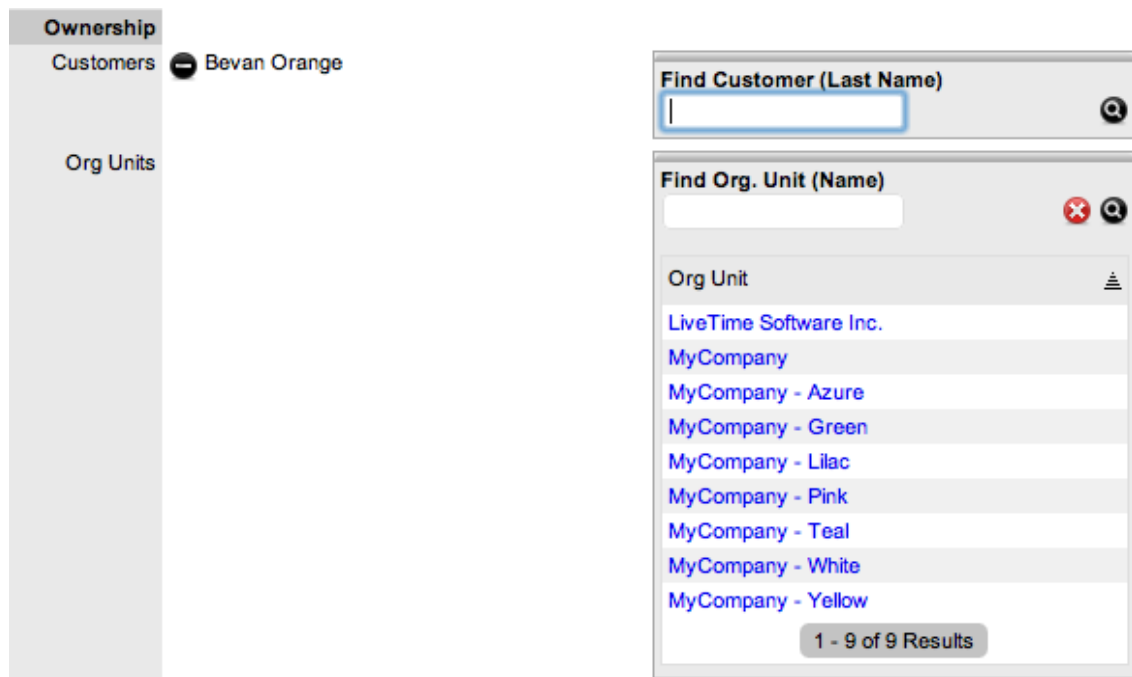
4. Amend the relevant Details

The options include Team, Status, Criticality, Warranty or Ownership for the Items, as required, or select the Delete option to remove the Items from the Items List.

5. For Items that require Ownership adjustments, click  next to the Owner details if the relationship is to be deleted

6. Use the Find options for the Customer and Organizational Unit owner information to be added

Click  without entering names in the Search Fields to return a complete list of Customers or Org Units.



7. Click on the relevant new owner link within the Find box to add the owner
8. Select Save.

The Details and Ownership information of all Items are updated.

## 1.48 Request Fulfilment Overview

The goal of Request Fulfilment is to manage the lifecycle of all Service Requests.

A Service Request is a generic term that describes the numerous and varied demands placed on the service and support organization. Many are small changes, which are considered to be low risk, frequently occurring and low cost in nature, such as change a password or install a software application request. Alternatively, it may simply be a Customer asking for information. It is the scale, frequency and low-risk nature of the Service Requests that require that they be handled by the Request Fulfilment process, and not Incident or Change Management.

The frequent recurrence of Service Requests requires a predefined process Workflow be set with the support Technicians, service targets and escalation paths in place. To cater for the diverse nature of Service Requests, at minimum two Workflows should be customized for Request Fulfilment, one to handle simple requests for information and the other to deal with standard changes.

In the system, Service Requests are logged against Service Items in the Service Catalog and follow Workflows that ensure that each Request is handled with consistency. The Workflows define the actions required to correctly implement any changes to the Service and define the responsibilities, authorization and timeframe expected to manage the changes that may result from a Service Request.

Once a Workflow is assigned to a Service Request, it is routed to an appropriate Technician based on Service Request Workflow State. After a Technician completes their assignment, the Request is forwarded to the next User based on the configuration of the next State for a standard change or closed, if it is a simple request for information.

When Service Requests are raised for Service Item breakdowns, the system allows them to be easily associated with an Incident within the Analysis tab of the Request. Or, if the Service Request results in a change to an Item that is not in the Service Catalog, a Change Request can easily be generated within the Service Request.

If a Service Request is related to an Incident, Problem or Change Request and that related request in the other Process is closed, the Service Request is automatically closed. The system views the request hierarchy from low to high as Service Request, Incident, Problem and Change Request, and if a related request of a higher type is closed, all the lesser type requests are automatically closed, or if the handshaking facility is enabled for the system, moved to the Pending-Approval State.

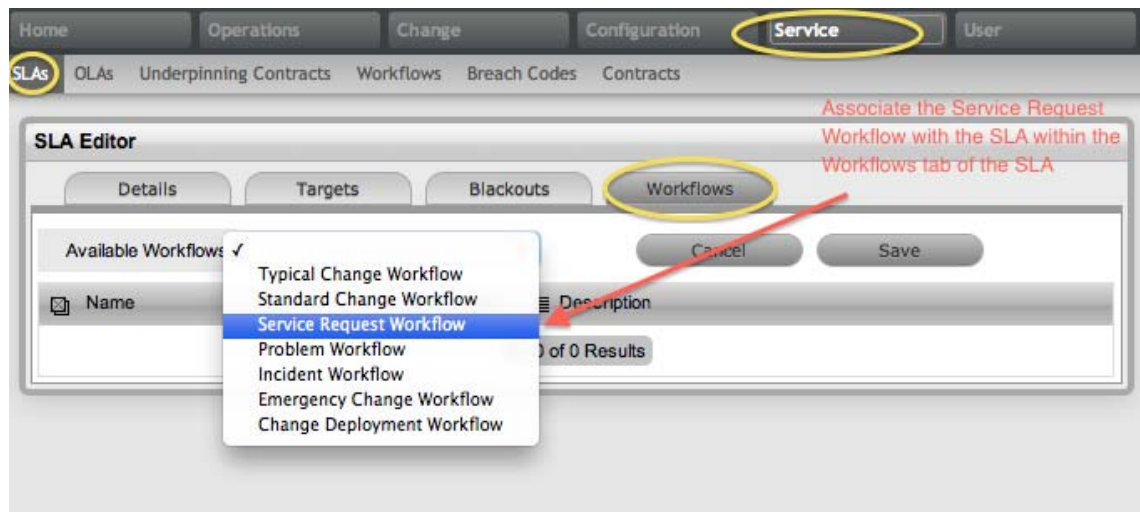
See: [Service Catalog](#).

## 1.48.1 Implementing Request Fulfillment

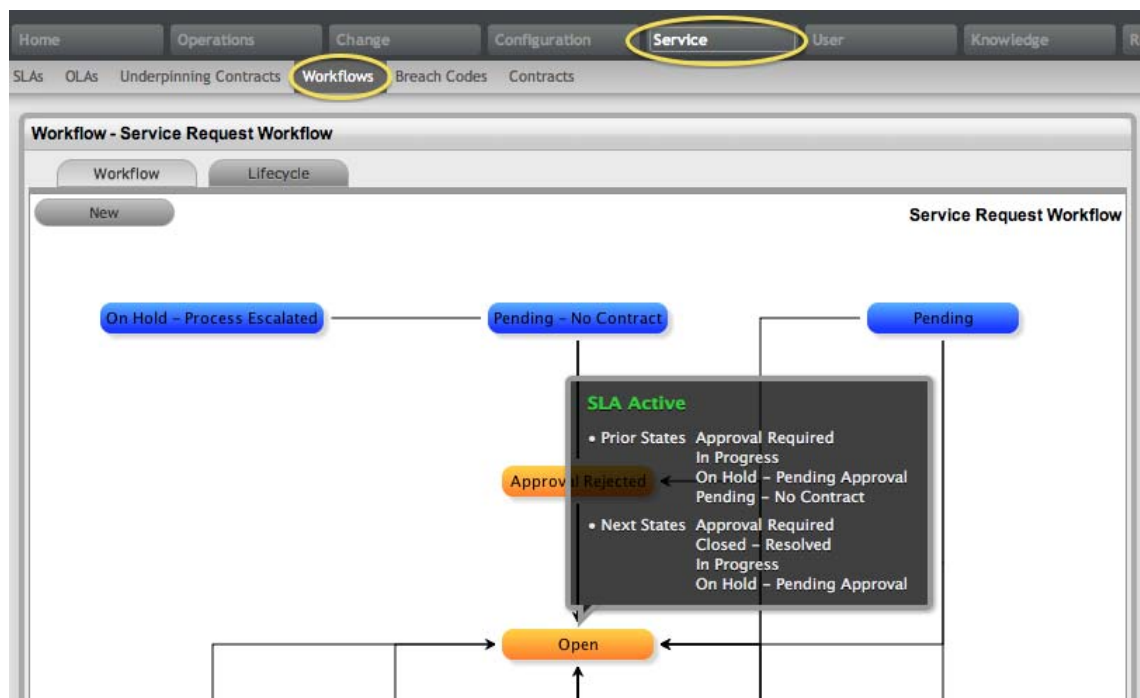
To set up the Request Fulfillment Process in the system, the following steps are to be completed:

1. Assign the Request Process to the relevant Users within the User Information screen under the User>Users tab. (See: [Create a User](#).)

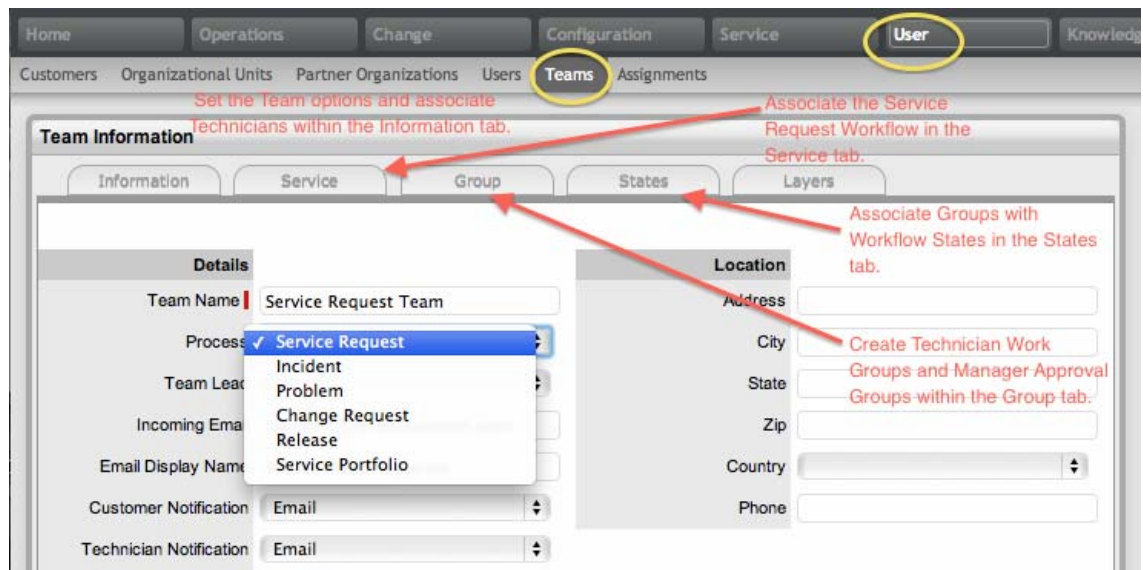
2. Create or review the SLA within the Service>SLAs tab, and associate the Incident Service Request Workflow to the SLA in the SLAs Workflow tab. (NB: The Supervisor User setting up the SLA must be assigned the Internal Process of Service Level in their User Information screen to complete this action.)



3. Review the Service Request Workflow within the Service>Workflows tab. (See: [Service Request Workflow](#).)



4. Create a Service Request Team within the User>Teams screen. (See: [Service Request Team](#).)



5. [Associate the SLA](#) to an Item or Customer or Org Unit. This final step ties all the elements together when a Service Request is created, as the SLA associated with the Item, Customer or Org Unit assigned to the Request determines the Workflow, Team and Technicians that are made available within the Service Request Information screen.

## 1.49 Assigning an SLA

Within the system a Service Level Agreement (SLA) can be assigned to a Customer, Organizational Unit, Item or a request. When a request is created, the system checks if any of these elements have an SLA. The business logic applied to assign an SLA to a request is as follows:

1. If the Customer has an SLA then assign this to the request
2. If the Customer does not have an SLA but the Organizational Unit does, assign this to the request
3. If the Customer or Organizational Unit does not have an SLA but the Item does, then assign this to the request
4. If none of the above elements have an SLA, the system Default SLA as defined by Admin in Setup>Privileges>Requests tab, is assigned to the request.

When Billing is enabled, the system checks that a maintenance contract is in place during the request creation process and assigns a Status of Pending - No Contract when an SLA contract is non-existent or expired. To assign an SLA in this situation, the Technician creates a Per Item or Per Request SLA Contract within the Contract tab of the request Information screen. (See: [Create a Contract](#).)

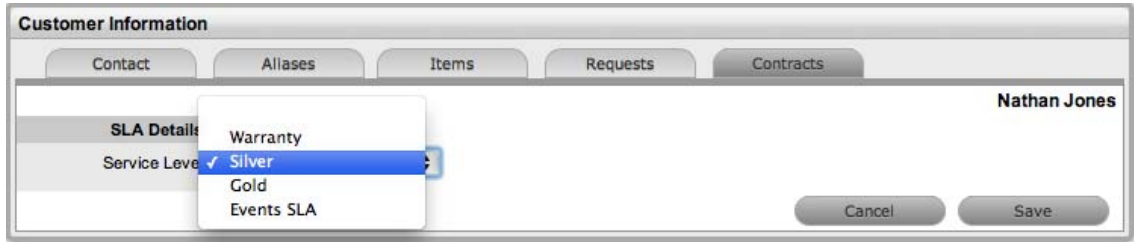
### 1.49.1 Assigning an SLA to a Customer

To assign an SLA to a Customer when Contracts are disabled:

1. Select User>Customers
2. Select the required Customer name link  
The Customer Information screen opens.



3. Move to the Contracts tab
4. Click Edit
5. In SLA Details, use the drop-down menu to select the SLA for this Customer

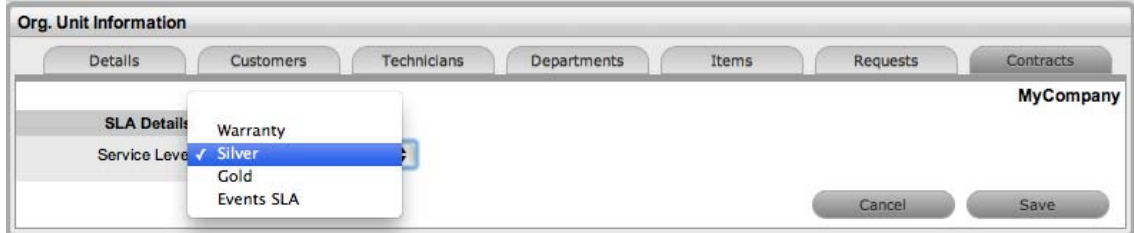


6. Click Save.

## 1.49.2 Assigning an SLA to an Organizational Unit

To assign an SLA to an Organizational Unit when Contracts are disabled:

1. User>Organizational Units
2. Select the required Org Unit Name  
The Org Unit Information screen will open.
3. Select the Contracts tab
4. Click Edit
5. In SLA Details, using the drop-down menu, select the SLA for this Customer



6. Select Save.

## 1.49.3 Assigning an SLA to an Item

To assign an SLA to an Item when Contracts are disabled:

1. Select Configuration>Items
2. Select the required Item number hyperlink  
The Item Information screen will open.
3. Select the Costs tab
4. Click Edit
5. In SLA Details, using the drop-down menu, select the SLA for this Item

6. Select Save.

#### 1.49.4 Assigning an SLA to a Request - Only when Billing is enabled

When a request is created without a valid contract, the system assigns the request a Pending - No Contract Status. The request is locked and cannot be edited by a Technician until a valid Contract is in place. See: [Create a Contract](#).

## 1.50 Incident Management

The function of the Service Desk is to act as the point of contact between customers of IT services (end users) and the IT service provider (IT department). Its role is to handle all requests for service, including Incidents, and provide an interface for other activities such as Request Fulfillment, Change, Problem and Configuration Management.

An Incident is defined as any event that is not part of the standard operation of a service, and causes, or may cause, an interruption to, or a reduction in the quality of service. The goal of Incident Management is to restore normal service as quickly as possible, with minimal disruption to the business. This ensures that the highest achievable levels of availability and service are maintained.

Incident Management objectives include:

- ◆ Incident detection and recording
- ◆ Classification of all Incidents and initial support
- ◆ Investigation and diagnosis
- ◆ Escalation
- ◆ Resolution and recovery
- ◆ Incident closure
- ◆ Incident ownership, monitoring, tracking and communication.

As part of the Incident Management Process, if an Incident is related to a Problem or Change Request and that related request in the other Process is closed, the Incident will be automatically closed. The system views the request hierarchy from low to high as Service Request, Incident, Problem and Change Request, and if a related request of a higher type is closed, all the lesser type requests are automatically closed

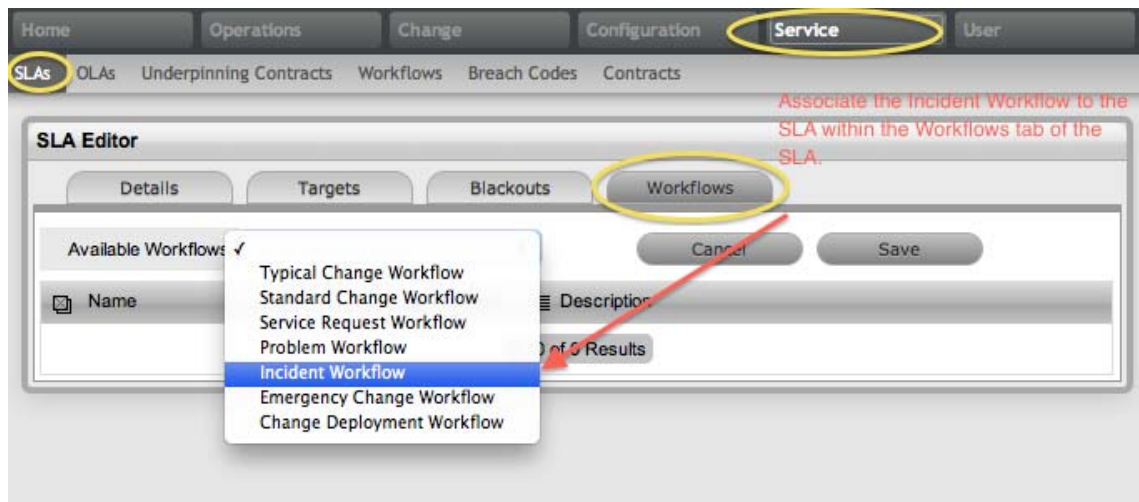
## 1.50.1 Implementing Incident Management

To set up the Incident Management Process in the system, the following steps are to be completed:

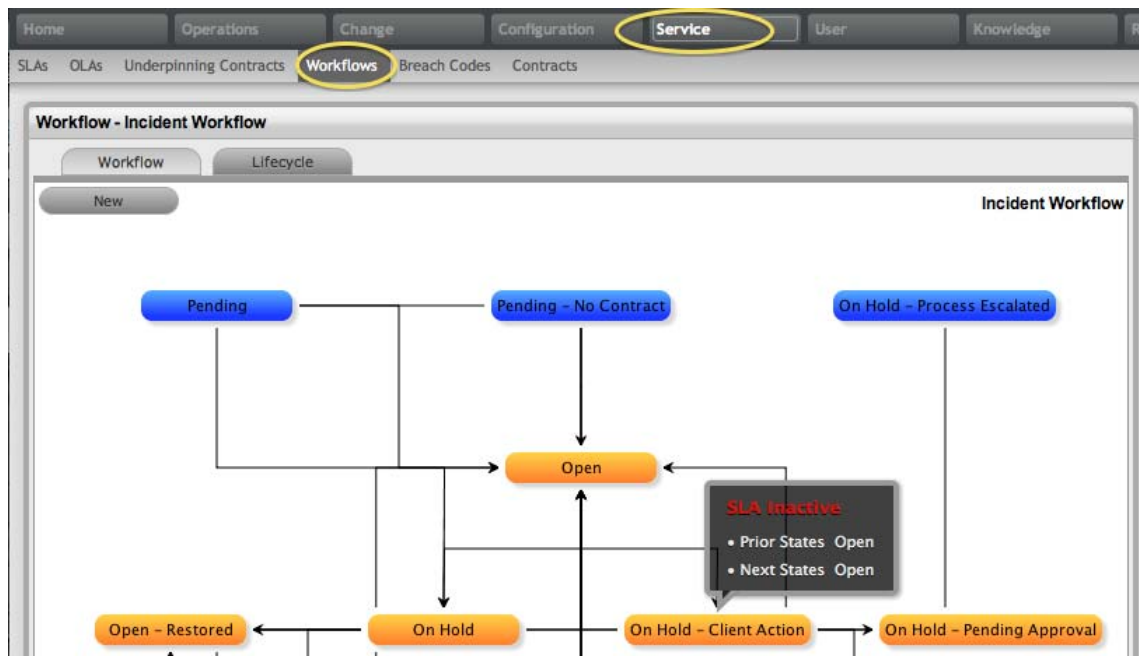
1. Assign the Incident Management Process to the relevant Users within the User Information screen under the User>Users tab. (See:[Create a User.](#))

Assign the Incident Process to the User within the User Information screen.

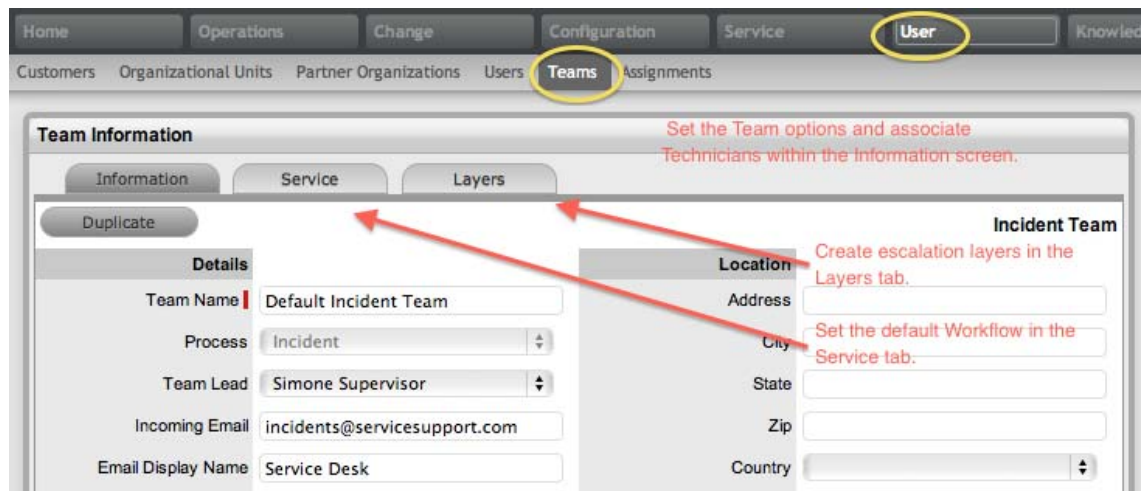
2. Create or review the SLA within the Service>SLAs tab, and associate the Incident Management Workflow to the SLA in the SLAs Workflow tab. (NB: The Supervisor User setting up the SLA must be assigned the Internal Process of Service Level in their User Information screen to complete this action.)



- Review the Incident Management Workflow within the Service>Workflows tab. (See: [Incident Management Workflow](#).)



- Edit the Default Incident Management Team within the User>Teams screen. (See: [Incident Management Team](#).)



5. [Associate the SLA](#) to an Item or Customer or Org Unit. This final step ties all the elements together when an Incident is created, as the SLA associated with the Item, Customer or Org Unit assigned to the Incident determines the Workflow, Team and Technicians that are made available within the Incident Information screen.

## 1.51 Problem Management

Problem Management extends the process of Incident Management. An Incident is a non-standard operational event with the potential to harm the quality of an IT service. Incidents are reported by end-Users, encountered by technicians and system/database Administrators, or automatically detected by system management tools. In all instances, Incidents should be reported to the Service Desk.

A Problem describes the underlying cause of one or more Incidents that are being investigated. However, not all Incidents are investigated as Problems. For example, if the power-supply in a desktop computer blew up, it should be treated as an Incident, and the power-supply replaced. (Although if the power-supply is controlled by Change Management, it would need to be treated as a minor change request.) However, if there was a spate of burnt-out power-supplies in the same model desktop, then an underlying Problem with the desktop may possibly exist and further investigation into the cause and potential solutions may be required.

For Incidents to be correctly categorized as a Problem, organizations must define the evaluation criteria. For example, raise a Problem if more than 10 Incidents are logged in the space of three hours that refer to the same Configuration Item.

After the underlying cause of a Problem has been diagnosed, it is referred to as a Known Error. At this point, the root cause of the Problem is known, and the most appropriate course of action is to be determined. This may take the form of a structural resolution by raising a request for change (RFC). Alternatively, it may be decided, after consultation with Users and Customers, to implement a workaround or recovery action.

In the case of the above example:

- ♦ *Problem*: Brand X Desktops no longer operating
- ♦ *Root Cause*: Faulty power-supply in July '09 models
- ♦ *Known Error*: Warranty - replace with new power-supply.

As part of the Problem Management Process, if a Problem is related to a Change Request and that related Change Request is closed, the Problem will be automatically closed. The system views the request hierarchy from low to high as Service Request, Incident, Problem and Change Request, and if a related request of a higher type is closed, all the lesser type requests are automatically closed.

## 1.51.1 Implementing Problem Management

To set up the Problem Management Process in the system, the following steps are to be completed:

1. Assign the Problem Management Process to the relevant Users within the User Information screen under the User>Users tab. (See:[Create a User](#).)

Home Operations Change Configuration Service **User**

Customers Organizational Units Partner Organizations **Users** Teams Assignments

### User Information

Information Schedule Aliases Team Skills Org Unit

Email vCard

First Name | Mary

Last Name | Calder

Username | marycalder

Password | .....

Confirm Password | .....

Roles

Supervisor  Technician  Partner

Administrator  Manager  Finance

Customer

Default Portal | User Portal

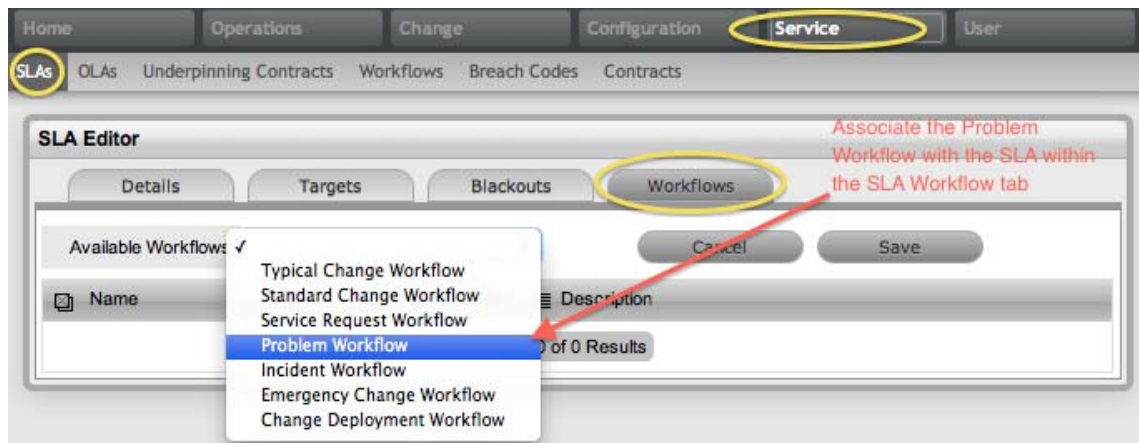
Operations Processes  Request  Incident  Problem

Change Processes  Change  Release  Deployment

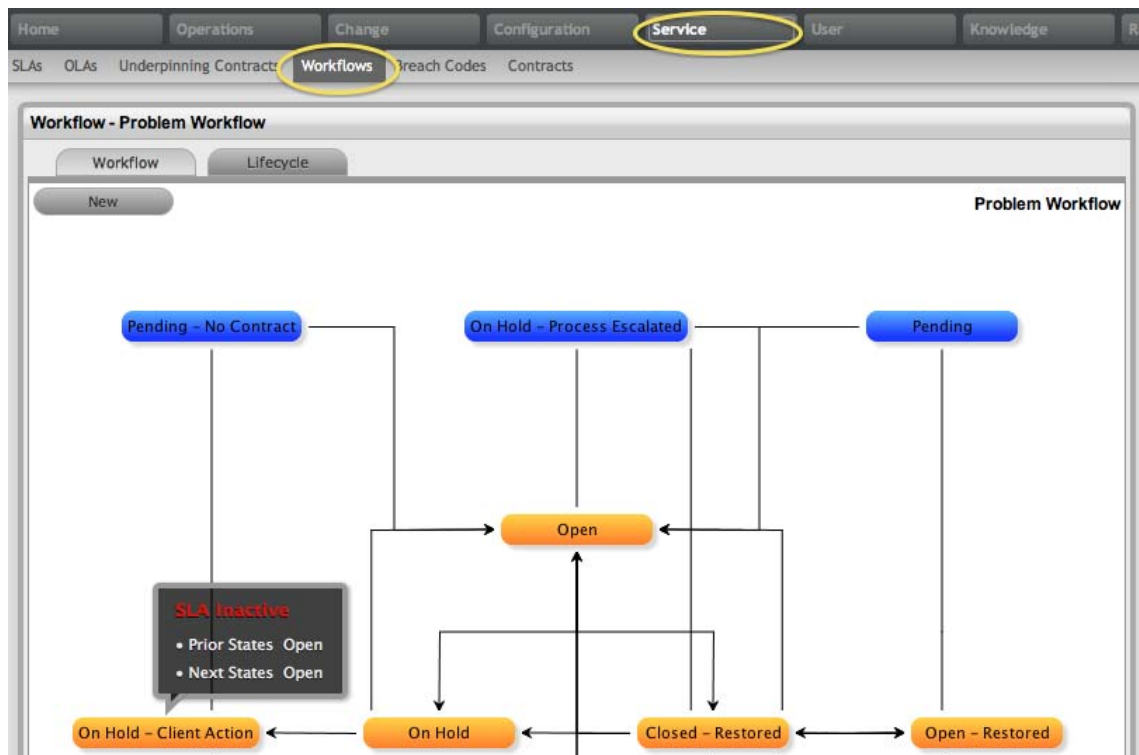
Internal Processes  Service Level  Configuration  Knowledge

Assign the Problem Process to the User within the User Information screen.

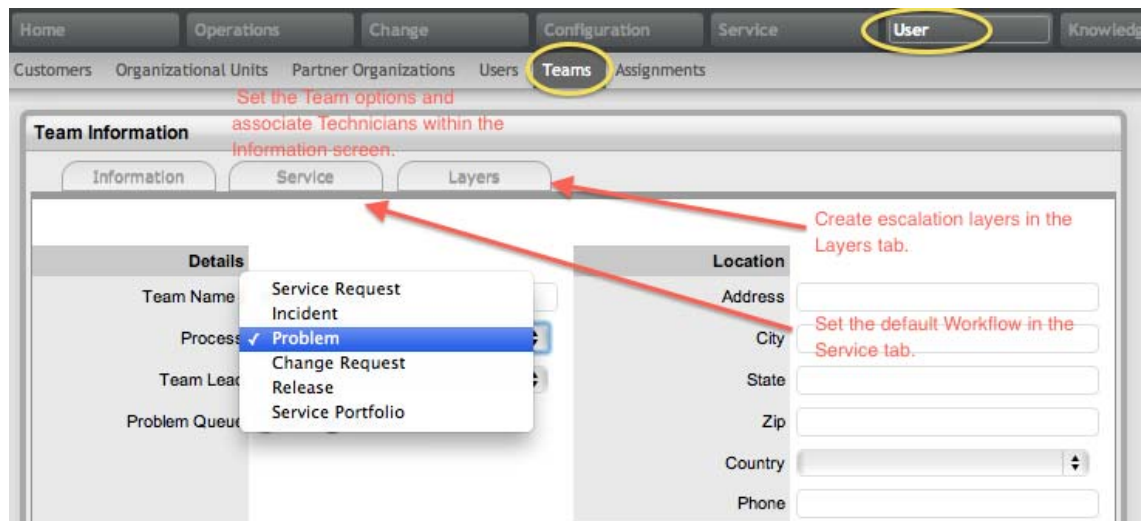
2. Create or review the SLA within the Service>SLAs tab, and associate the Problem Management Workflow to the SLA in the SLAs Workflow tab. (NB: The Supervisor User setting up the SLA must be assigned the Internal Process of Service Level in their User Information screen to complete this action.)



3. Review the Problem Management Workflow within the Service>Workflows tab. (See: [Problem Management Workflow](#).)



4. Create a Problem Management Team within the User>Teams screen. (See: [Problem Management Team](#).)



5. [Associate the SLA](#) to an Item or Customer or Org Unit. This final step ties all the elements together when a Problem is created, as the SLA associated with the Item, Customer or Org Unit assigned to the Problem determines the Workflow, Team and Technicians that are made available within the Problem Information screen.

## 1.52 Change Management

The goal of Change Management is to ensure that standardized procedures are used to efficiently handle all changes, and minimize the impact of any related Incidents upon a service. The Change Management process prevents unauthorized CMDB modifications and reduces disruption to Customers. It does this by coordinating the build, test and implementation of any change that impacts the CMDB.

Changes may arise reactively in response to Problems or externally imposed requirements, for example a new or changed regulatory situation. They may also be proactive, instigated by management to improve an organization's efficiency and effectiveness, or to enable or reflect new service improvement initiatives.

The Change Advisory Board (CAB) is responsible for approving any Request for Change (RFC). This involves assessing the impact, resources and priority of the RFC. The CAB then advises the Change Manager of their assessment and assigns an appropriate Workflow.

Change Workflows within the system ensure that each RFC is handled with consistency, based on the risk and impact assessment of the CAB. Change Workflows define the actions required to correctly implement the change, and define the responsibilities, authorization and timescale expected to manage the change.

Once a Workflow is assigned to an RFC, it is routed to an appropriate Technician based on the Change Workflow State. After a Technician completes their assignment, the RFC is forwarded to the next Technician based on the next state of the Change Workflow.

When the RFC has progressed through all of the required Workflow States, a change review is undertaken to verify that the RFC has achieved its objectives. If the change objectives are not met, the RFC's associated back-out procedure is implemented to rollback the change and restore the CMDB to a valid state.



As part of the Change Management Process, all requests related to a Change Request are automatically closed when the related RFC is closed. The system views the request hierarchy from low to high as Service Request, Incident, Problem and Change Request, and if a related request of a higher type is closed, all the lesser type requests are automatically closed.

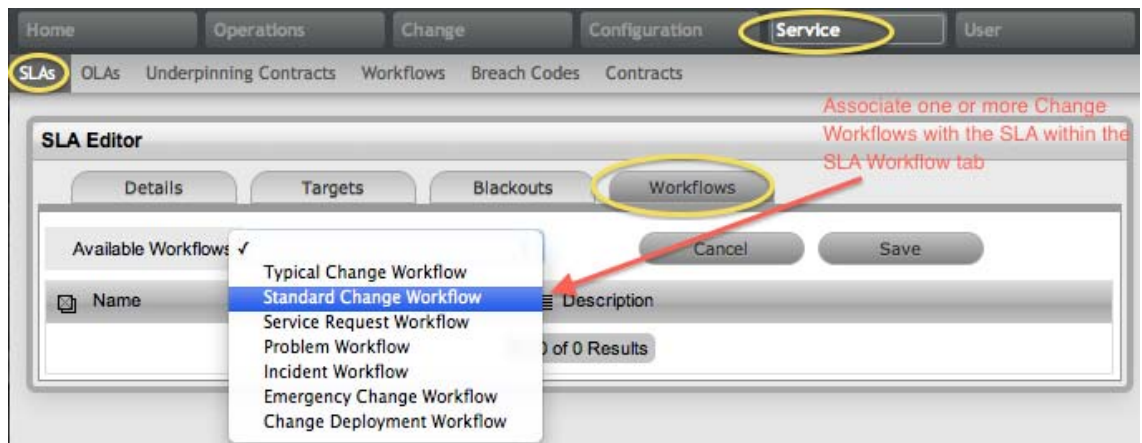
## 1.52.1 Implementing Change Management

To set up the Change Management Process in the system, the following steps are to be completed:

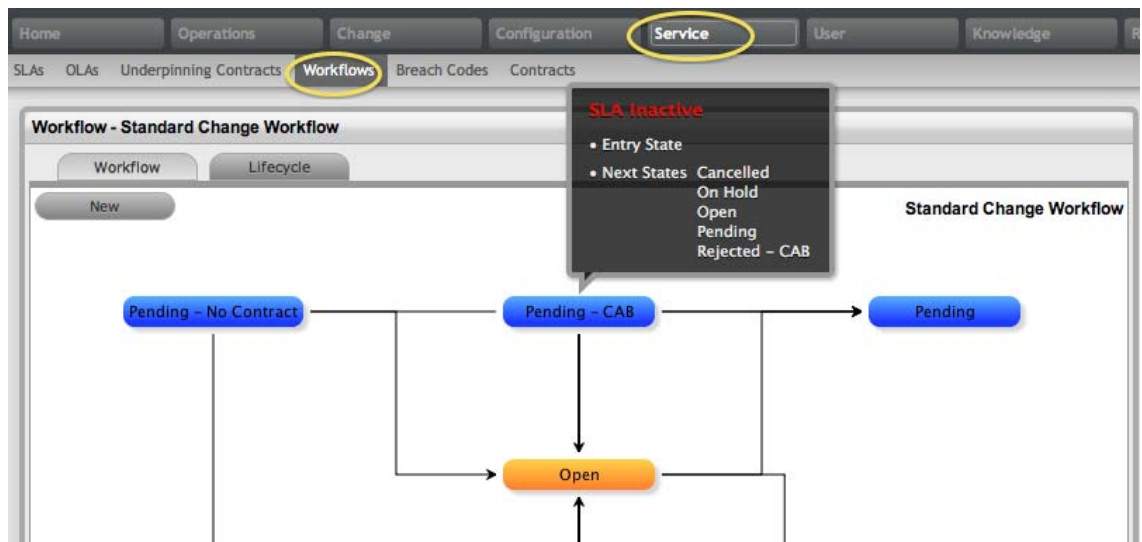
1. Assign the Change Process to the relevant Users within the User Information screen under the User>Users tab. (See:[Create a User](#).)

The screenshot displays the 'User Information' configuration page. The top navigation bar includes 'Home', 'Operations', 'Change', 'Configuration', 'Service', and 'User' (highlighted). Below this, a secondary navigation bar shows 'Customers', 'Organizational Units', 'Partner Organizations', 'Users' (highlighted), 'Teams', and 'Assignments'. The main content area is titled 'User Information' and contains several tabs: 'Information', 'Schedule', 'Aliases', 'Team', 'Skills', and 'Org Unit'. The 'Information' tab is active, showing fields for 'First Name' (Mary), 'Last Name' (Calder), 'Username' (marycalder), 'Password', and 'Confirm Password'. Below these are 'Roles' with checkboxes for Supervisor, Administrator, Customer, Technician, Manager, Partner, and Finance. The 'Default Portal' is set to 'User Portal'. Under 'Operations Processes', 'Request', 'Incident', and 'Problem' are checked. Under 'Change Processes', 'Change' is checked. Under 'Internal Processes', 'Service Level', 'Configuration', and 'Knowledge' are checked. A red arrow points from the 'Change' checkbox to a red text annotation: 'Assign the Change Process to the User within the User Information screen.'

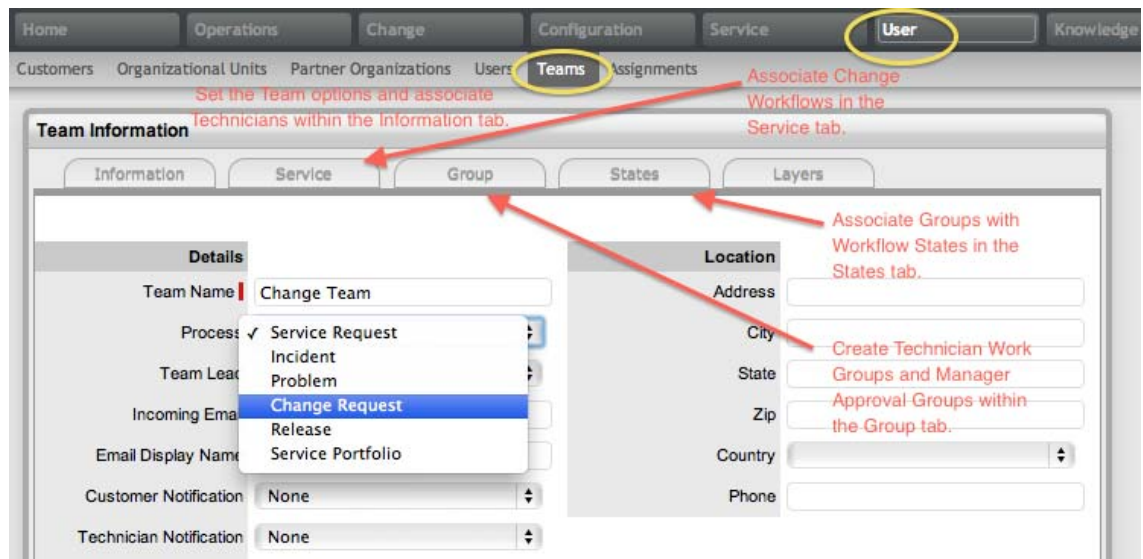
2. Create or review the SLA within the Service>SLAs tab, and associate the Incident Service Request Workflow to the SLA in the SLAs Workflow tab. (NB: The Supervisor User setting up the SLA must be assigned the Internal Process of Service Level in their User Information screen to complete this action.)



3. Review one or more Change Management Workflows within the Service>Workflows tab. (See: [Change Management Workflows](#).)



4. Create a Change Management Team within the User>Teams screen. (See: [Change Management Team](#).)



5. [Associate the SLA](#) to an Item or Customer or Org Unit. This final step ties all the elements together when a Change Request is created, as the SLA associated with the Item, Customer or Org Unit assigned to the Request determines the Workflow, Team and Technicians that are made available within the Service Request Information screen.

## 1.53 Release and Deployment Management

The purpose of Release and Deployment Management is to maintain the integrity of an organization's production environment when deploying releases. Effective Release and Deployment processes allow your service organization to deliver change faster and with minimal risk to the business. It provides consistency in implementation approach and assures customers that they can use a new or changed service in line with business requirements.

Part of the Service Transition phase of the Service Lifecycle, Release is responsible for planning, scheduling and controlling changes and updates from Test to Live environments. It ensures the integrity of the Live Environment is protected and that the correct components are released. While Deployment includes the activities or tasks responsible for moving new or changed hardware, software, documentation and process to the Live Environment.

This process is overseen by the Release Manager, whose role is paramount to the success of a release and a required member of a Release Team. The Release Manager directs the process using all information presented to help assess release readiness, and to efficiently identify deployment targets for the deployment phases of a release. This level of control guarantees the Release Manager can deliver updates to the live environment successfully, to all relevant parties, on time.

The capability to leverage relationship maps defined within the embedded CMDB allows the Release Manager to assess the impact of a release, as all related Items can be easily associated with a release package. The extensive use of CIs to represent all aspects of a release and the capability to directly associate any category of CI with the release itself provides a complete picture of how a release will impact the organization before any tasks are undertaken. The Release Manager can identify CI Types impacted by the deployment and CMDB information details users, organizational units and specific infrastructure affected by a release.

Complex and generally a lengthy process, large scale deployments require project management to ensure success. To this end, Release Management includes related activities that require scheduling in and around the internal activities of the service desk. The Release Manager can readily achieve this by exporting release package information to Microsoft Project and administering the full process using a dedicated project management tool.

Exported project files contain all related Change Requests for a Release, providing all relevant parties with an end-to-end schedule of change. The export can also be filtered to include deployment activities that can be merged into the final schedule once the Implementation of all Changes is completed, resulting in a full historical account of the release cycle.

Within the system, the Release Manager creates and manages the Release within the Change>Release tab. Within the Deploy tab of a Release, the Deployment Tasks are generated and made available as groups within the Change>Deployment tab, while the individual activities are available within the Change>Deployment Tasks tab.

To review examples of Release and Deployments, refer to [Release Management Applied](#).

## 1.54 Release Management Applied

Release Management in the system provides Release and Deployment Managers with a centralized repository for managing the introduction of changes, regardless of size or risk, to the environment. Two examples for rolling out a Release are detailed below, as Releases can potentially be very complex, which requires great flexibility in the system.

The first example illustrates a software rollout, with software being upgraded, replaced and a couple of new installations. Although this Release may be considered a little complicated, the nature of the Release is low risk. Due to the minimal business criticality level of the Release, it has been decided that this deployment will not be controlled by Change Management. The second example that manages the update of Microsoft Exchange, a higher risk Release, controls the Deployment with Change Management.

Before commencing the examples, the system needs to be configured to handle Release Management and the following elements must be in place:

[Users assigned the Release & Deployment Process](#)

[Create a Release & Deployment Team](#)

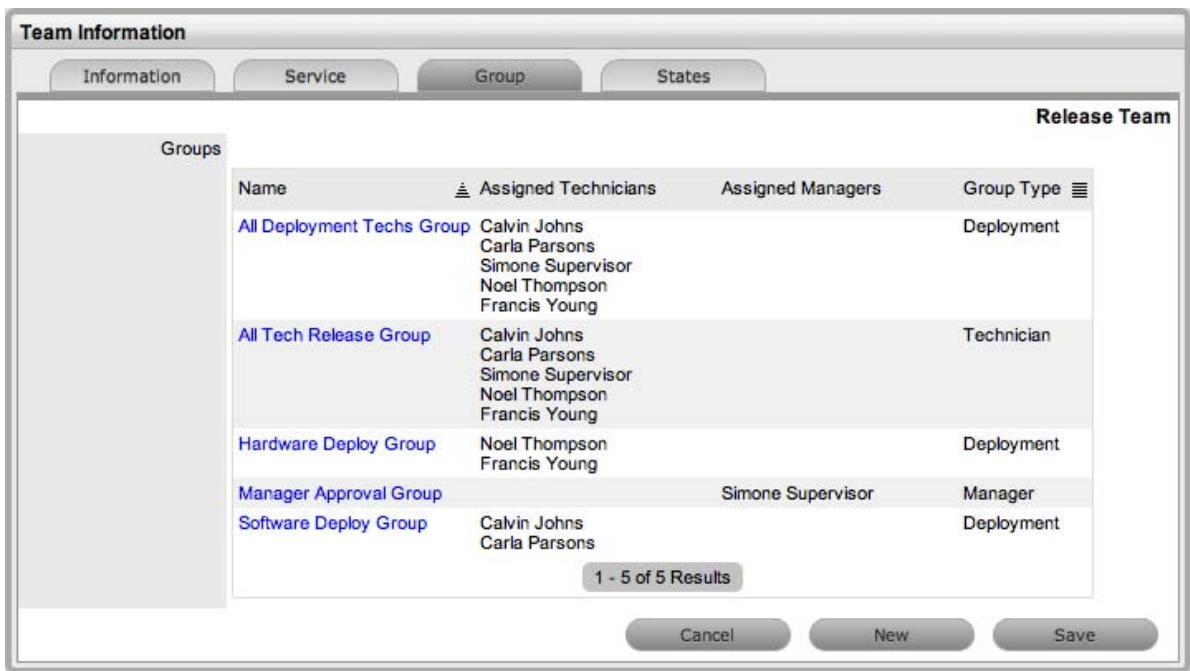
[Build or Edit the Release Workflow.](#)

### 1.54.1 Example 1: Install, upgrade and replace Office packages

Release Objective: To rollout the latest update of Office 2008 to customers. Replacing existing software for customers that have Open Office, and installing new software for customers without access to any Office applications.

The example will apply the system default Release Workflow that includes an added Workflow State of Trial Deploy and also has a number of Approval States. It includes Deploy and Trial Deploy States as the Workflow stages for creating the related Deployment Tasks in the system.

The Release Team that will action the Deployment Tasks has also been divided into three Groups: Software, Hardware and all Deployment Technicians.



To create the Release:

1. Go to Change>Releases
2. Click New
3. Complete the Release information

**Release - Update Office Software**

Details | Item Types | Analysis | Elements | Deployments

**Details**

Name: Update Office Software

Priority: Low

Team: Release Team

Group: All Tech Release Group

Workflow: Release Workflow

Status: Plan

Next Action: Plan

Manager: Simone Supervisor

Description | Attachment | Impact | History

**Description**

Format | Font family | Font size | HTML

Upgrade customer to the latest version of from Microsoft 2008. Replace OpenOffice Software with Microsoft Office 2008. Install Microsoft 2008 for customers with no Office software.

Path: Words: 23

Delete | Cancel | Save

| Release Fields | Description   |
|----------------|---|
| Name           | Enter a Name that reflects the objective of the Release.  |
| Priority       | Set the Priority, which will correspond to the target timeframes for the SLAs associated with the Release via the RFCs.   |
| Team           | Select the Release Team who will oversee all part of the Release.   |
| Workflow       | Set the Workflow that includes the relevant stages to manage the Release.<br><br>The Release Manager moves the Release through the stages of the Workflow, relevant to the events being undertaken and completed. |
| Status         | This is set to the Default Entry State of the selected Workflow.  |

| Release Fields | Description   |
|----------------|---|
| Next Action    | <p>Based on the assigned Workflow, select the next Workflow State for the Release, as required by the next Release activity.</p> <p>Some States are Approval States, when the Release moves to an Approval State the Approve 🗳️ and Reject 🚫 options are visible. The Release Manager selects the appropriate option and the system automatically moves the Release to the pre-configured next State, relative to the option applied.</p> |
| Manager        | <p>From the drop-down list of Managers assigned to the default Entry Point of the assigned Release Workflow, select the Release Manager to manage the project when it is initially created.</p> <p>The User defined here, is the Manager who can edit the Release after it is saved and then move it to the next State.</p>   |
| RFC Control    | <p>If the Control Deployments via RFC option is enabled in Admin&gt;Setp&gt;Privileges&gt;Requests, this field will be displayed.</p> <p>Select Yes if the Deployment is to be routed through Change Management, to enable the scheduling of Deployment Tasks. Select the RFC Workflow to manage the Change Request associated with the Deployment, and set the default open State or Deployment State for the Tasks.</p>                 |
| Description    | <p>Enter information that describes the goal of the Release.</p>  |

#### 4. Select Save.

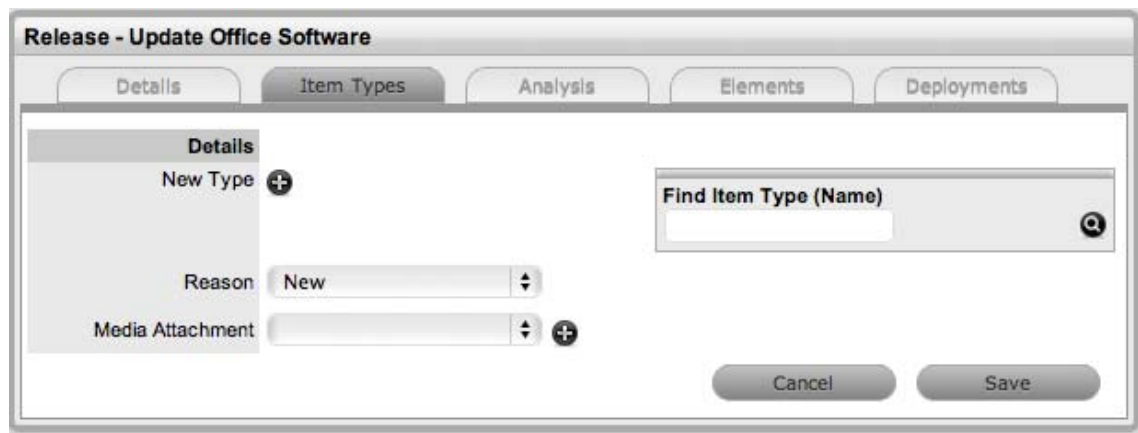
From the above screen snap, we can see that Simone Supervisor is the Release Manager assigned to the Release and that the Release is of low Priority, will be handled by the Release Team and managed using the Release Workflow. The Release is currently in the default entry point of the Release, the Plan State. It should be noted that moving through the Release Workflow is determined by your organization's business processes and the defined Workflow. The system is to be used as a central repository to manage Releases and a point of reference to keep all relevant parties updated regarding a Release.

## 1.54.2 Assign Item Types

To associate the Items that are to be created or updated as part of the Release, the Release Manager has to define the reason for the Release and assign the relevant Item Type to the Release. This is achieved within the Item Types tab of the Release. For our example, there will be three reasons for the Release:- Upgrade existing software, replacing existing software and installing new software.

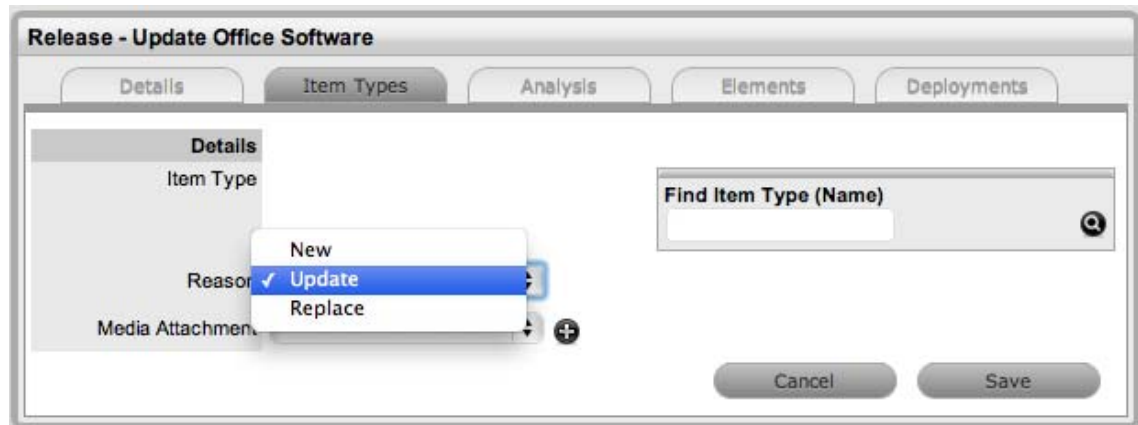
As a Release Manager, to assign Item Types to the Release:

1. Select the Item Types tab inside the Release information screen
2. Click Edit
3. Click Add



4. Assign the Reason of Update

For customers with Office 2008, based on the system configuration within the CMDB Item Type of Office 2008, we will just be updating the software version number in the Item Details tab.



5. Search and select the Item Type Office 2008 in the Find Item Type field

When the Item Type is associated with the Release, the fields available on the Details Tab of Items using the Type are displayed.

6. Enter the information that is to be updated against the Item in the CMDB and Save

For our example 2011 will be entered in the Version # field.



**Release - Update Office Software**

Details    **Item Types**    Analysis    Elements    Deployments

**Details**

Item Type Office 2008

Reason Update

Media Attachment

**Fields**

Location

Environment

Version # 12.0.3

License Key

License Count

License Expiry

Ownership

Order #

Supplier

Supply Date

Find Item Type (Name)

Cancel Save

Details to be updated on the Items included in the Release

7. To *replace* Open Office with Microsoft Office 2008, click Add
8. Select the Reason of Replace  
The Find Item Type field is displayed next to the New Type field.
9. Search and Select the Item Type to be replaced within the Item Type field  
For this example it is Open Office.



10. Select the Item Type link for the Item Type to be replaced
11. Search and Select the Item Type that is to replace the existing Item Type  
For this example, Office 2008 is the replacing Item Type.
12. Select the Item Type link for the Item Type information to be replaced  
The fields contained on the Details tab of Items applying the Item Type are automatically displayed.
13. Enter information into the fields that are to be updated on the Items in the CMDB  
For this example, the Version # details is updated to include 12.0.3.

**Release - Update Office Software**

Details    **Item Types**    Analysis    Elements    Deployments

**Details**

Item Type OpenOffice *Item Type to be replaced*

New Type Office 2008 *Replacement Item Type*

Reason Replace

Media Attachment

**Fields**

Location

Environment

Version # 12.0.3 *Information to be updated on the Details tab of the Item, as part of the replacement process.*

License Key

License Count

License Expiry

Ownership

Order #

Supplier

Supply Date

Find Item Type (Name)

Find Item Type (Name)

Cancel Save

14. Click Save
15. To create new Items in the system, click Add  
The Reason of New is assigned by default.
16. Search and select the Item Type to be applied to newly created Items in the CMDB  
For this example, new Items using Office 2008 are being created.
17. Assign the Item Type to the Release  
The fields available on the Details tab of Items using the Type are displayed.

**Release - Update Office Software**

Details    **Item Types**    Analysis    Elements    Deployments

**Details**

New Type Office 2008

Reason New

Media Attachment

**Fields**

Location

Environment

Version # 12.0.3

License Key

License Count

License Expiry

Ownership

Order #

Supplier

Supply Date

Find Item Type (Name)

New Items to be created using the selected Item Type

Information to be completed on the Details tab of the newly created Items

Cancel Save

18. Enter the information that is to be updated against the Item in the CMDB  
For our example 12.0.3 will be entered in the Version # field.
19. Click Save

**Release - Update Office Software**

Details    **Item Types**    Analysis    Elements    Deployments

Add Remove

**Details**

Related Item Types

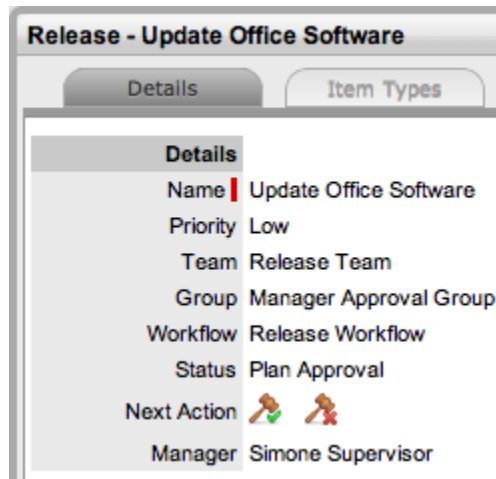
| <input type="checkbox"/> | Item Type   | Reason  | New Type    | <input type="checkbox"/> | Media Attachment |
|--------------------------|-------------|---------|-------------|--------------------------|------------------|
| <input type="checkbox"/> |             | New     | Office 2008 | <input type="checkbox"/> |                  |
| <input type="checkbox"/> | Office 2008 | Update  |             | <input type="checkbox"/> |                  |
| <input type="checkbox"/> | OpenOffice  | Replace | Office 2008 | <input type="checkbox"/> |                  |

1 - 3 of 3 Results

Cancel Save

20. After all Types have been assigned to the Release, move the Release to the next relevant State.

For this example, the Release moves to Plan Approval and approval is given. The system automatically moves the Release to Build.



As the Release is not to be managed using Change Management, the Release Manager can move directly to the Deploy tab to create the Deployment Tasks.

### 1.54.3 Create Deployment Activities

Deployment Tasks, the activities completed by Technicians included in the Release Team Groups, are created in the system by considering the physical location of the Customer or Organizational Unit. That is, when grouping the tasks that are to be completed as part of a Release, the system presents the information based on Customer location so Technicians can be deployed to specific locations to complete jobs.

Tasks can be created on a per Customer Deployment basis for Items that are assigned specifically to Customers. Or, for Items that are shared across Org. Units or by an Org. Unit, the Create option of Deployment per Org. Unit can be used for creating the Deployment. The Global Deployment option allows the Tasks to be created for the whole Organization as the Item being updated, created or replaced is owned/accessed by all Customers in the system.

Once the Customers are assigned to the Deployment, either directly or via an Organizational Unit the Release Manager must define the Group of Technicians within the Release Management Team who will action the Tasks and set the stage of the Release Workflow for the Deployment Tasks to move into an Active State ready to be completed by Technicians.

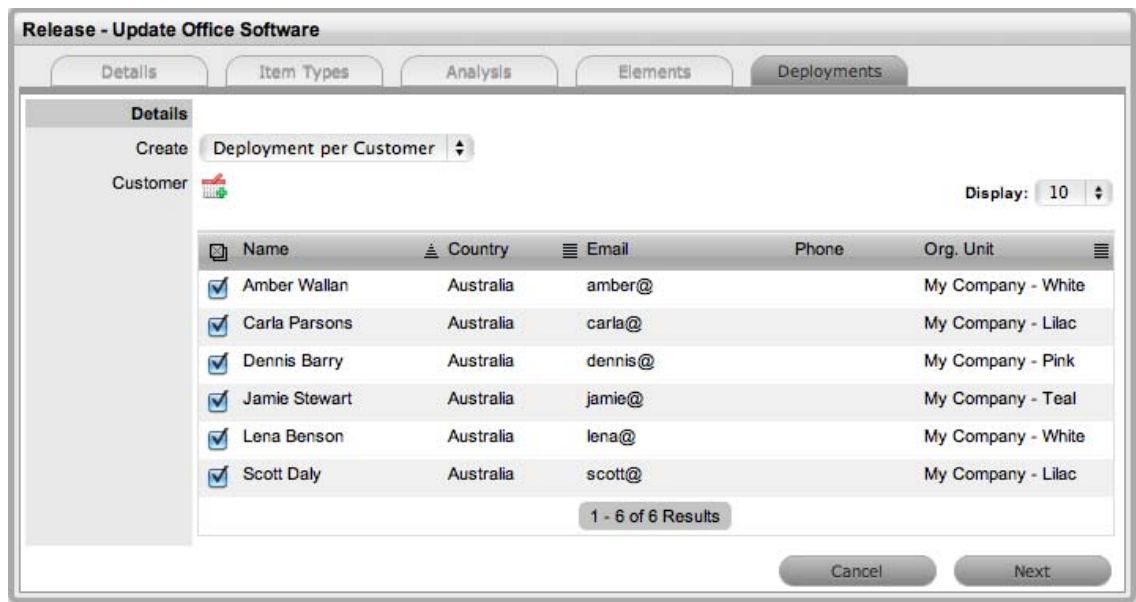
To create the group of Deployment Tasks:

1. Select the Deployments tab inside the Release information screen
2. Click New

The screen expands to show the options for the type of deployment to be created, the list of Customers who own an Item associated with the Item Types included in the Release Types tab and the Search Options box.

3. Select the type of Deployment that is to be created

For this example, per Customer Deployments will be created as all Items associated with the Release are owned directly by Customers. The list of Customers can be sorted into Org. Unit groups by clicking the toggle in the Org. Unit Column Header.

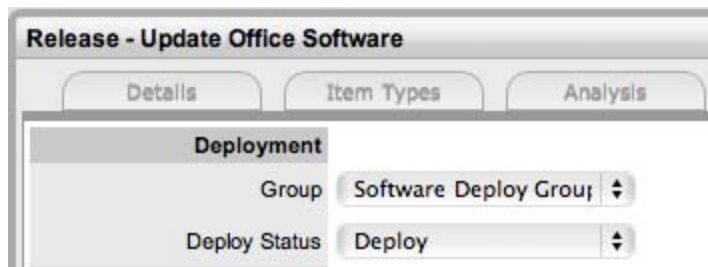


- Assign the Customer(s) to the per Customer Deployment by selecting the field next to the Customer name and clicking 

The selection is included in a Selected Customers window to the right of the main window. When all Customers are assigned to the Deployment, the group of Technicians who will action the Tasks and the Workflow State where the Tasks will become active in the system must be defined.

- Click Next
- Select the Group of Technicians who will work on the Deployment Tasks from the Group drop-down list

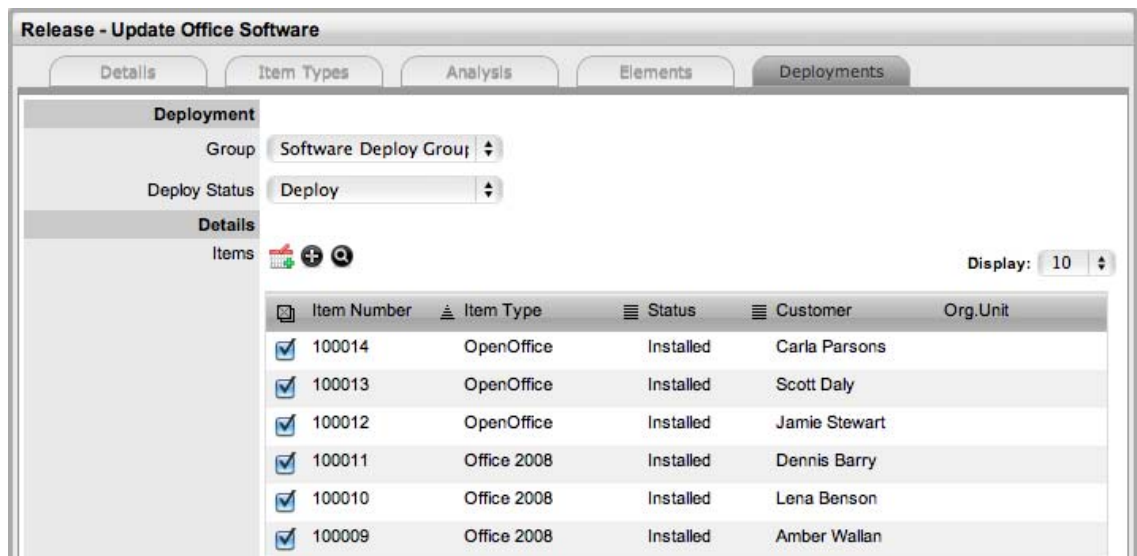
For this example the Software Technicians will be assigned.



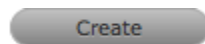
- Assign the stage of the Workflow where the Deployment Tasks will become active in the system  
As the Release is related to simply upgrading or installing Office 2008, the Deploy State will be assigned as the action State.

- Select the Items to be included in the Deployment

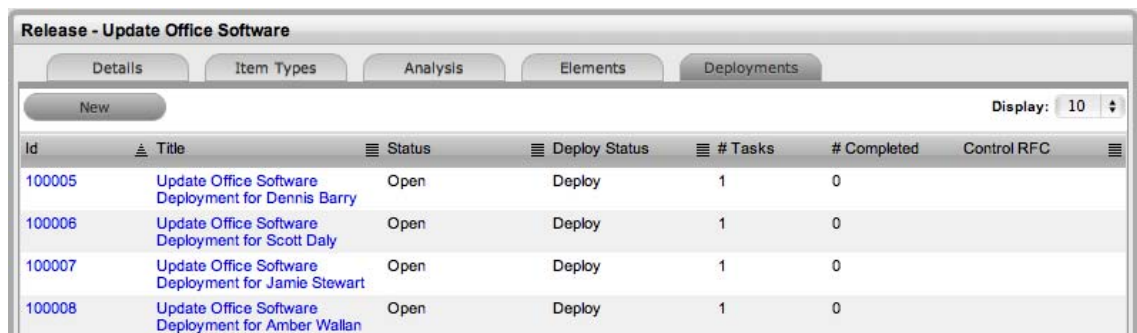
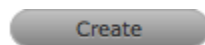
For this example, as the replacement and upgrade of Items is simple software, all Items will be created as one Deployment that will result in individual Tasks being created.



9. Click
10. Click

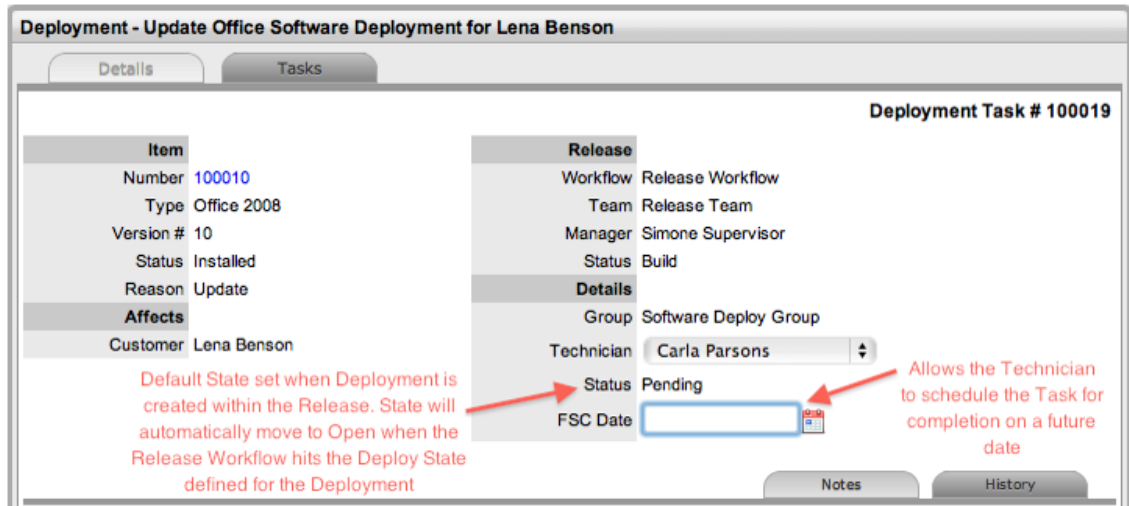


11. For the new installations of Office for customers select within the Items field
12. Tick the relevant Item Type and define if the Item is to be shared or one created for each Customer
13. Click



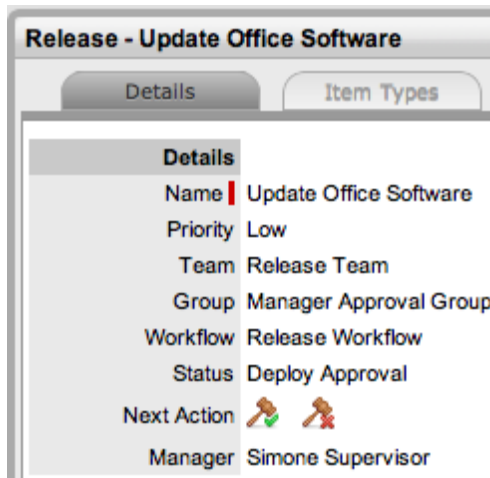
14. Click Done.

All Tasks are now saved with a Status of Pending assigned. When the Release Workflow moves to the Deploy State, the Tasks' Status will automatically be updated to Open, prompting Technicians to complete the Deployment Tasks and move their State to Closed - Resolved. When all Tasks are completed and moved to Closed - Resolved, the Release will be automatically Closed.



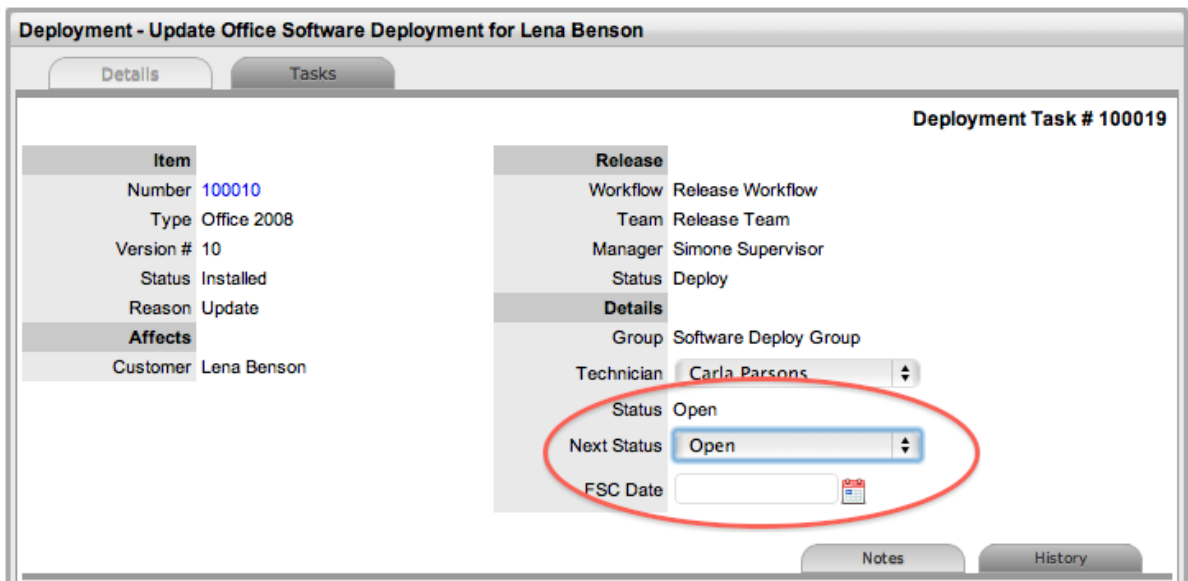
### 1.54.4 Action Deployment Tasks

The Deployment activities created within the Deploy tab of the Release are listed in the Deployments and Deployment Tasks tabs of Change in the system. The Release Manager works the Release through the assigned workflow within the Details tab of the Release. When the Status of the Workflow is set to the Deploy State defined within the Deployment, the Tasks will move from Pending to Open.

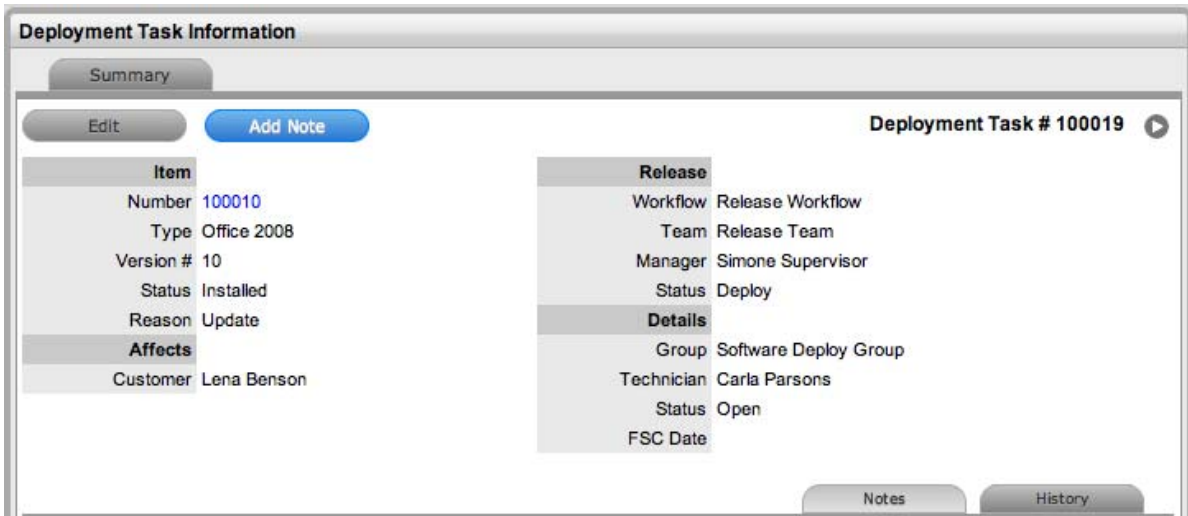


For this example, within the Releases>Release#>Details tab the Release Manager has moved the Release through the Workflow States of Plan, Plan Approval, Build, Test and is currently assigned the State of Deploy Approval. Selecting Accept will move the Release to Deploy, and the associated Tasks will automatically move to Open.

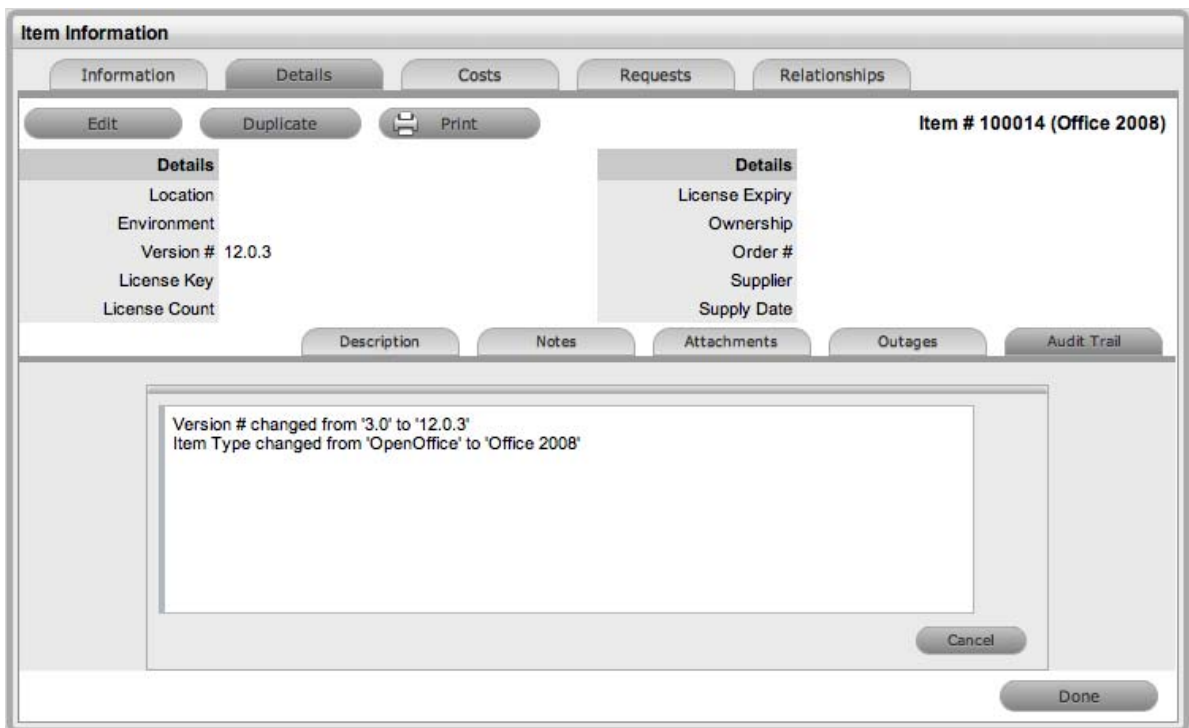




Within the Change > Deployment Tasks tab, Technicians can edit Deployment Tasks by adding Notes using the New Note button, which are stored in the Notes tab, or update the Status of the Task to Closed-Resolved. When all Deployment Tasks are completed, the Deployment is automatically closed by the system. When all Deployments are closed for a Release, the Release Manager can close the Release within the Details tab, by moving the Release Workflow Status to the Exit State.



Item details in the CMDB are also automatically updated, based on the information included in the Release.



### 1.54.5 Example 2: Update Microsoft Exchange

Although this is considered a less complex activity as it involves only one Item, due to the business critical nature of Exchange the risk is higher. Therefore, as a Release Manager, it has been decided to manage this Release using Change Control. To manage Deployments using Change Management, ensure the Administrator has enabled the Control Deployments via RFC option in the Setup>Privileges>Requests Tab.

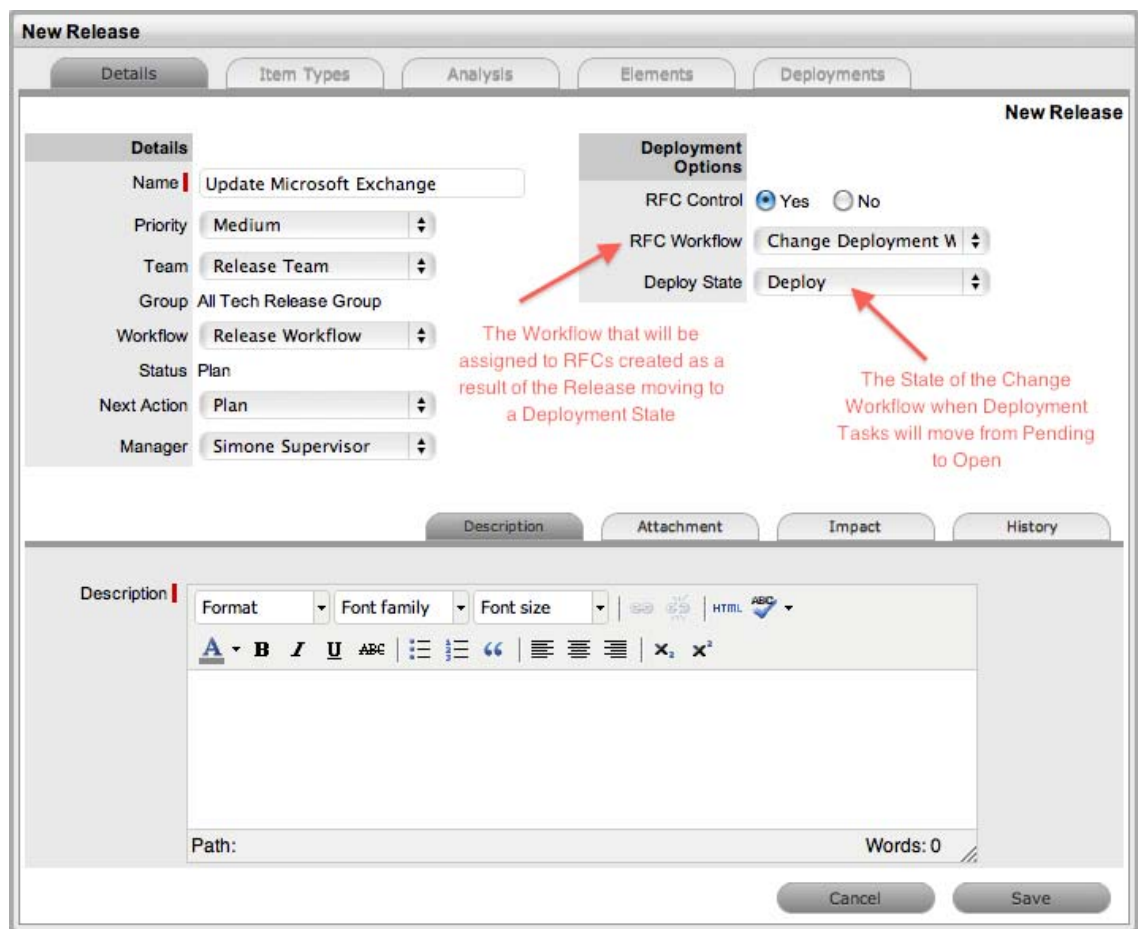
Release Objective: To update Exchange to Microsoft Exchange 2010

The example will apply the system default Release Workflow that includes an added Workflow State of Trial Deploy and also has a number of Approval States. It includes Deploy and Trial Deploy States, as the stages of the Workflow where the related Change Requests (RFCs) are automatically created for the Deployment, and only when the RFCs hit the Deploy State configured for the RFC Control within the Details tab of the Release do the Deployment Tasks become active. The Change Manager can view all Deployment Tasks related to the RFC within the RFC Summary screen, and when all Tasks are moved to Closed-Resolved the Change Manager can close the related RFC.

The Release Team that will action the Deployment Tasks has also been broken down into three groups, Software, Hardware and all Deployment Technicians.

To create a Release with the Deployment Control managed by Change Management:

1. Define the settings within the Details Tab and set the RFC Control option to Yes



2. Click Save

From the above screen snap, we can see that Simone Supervisor is the Release Manager assigned to the Release and that the Release is of low Priority, will be handled by the Release Team and managed using the Release Workflow. The Release is currently in the default entry point of the Release, the Plan State. It should be noted that moving through the Release Workflow is determined by your organization's business processes and the defined Workflow. The system is to be used as a central repository to manage Releases and a point of reference to keep all relevant parties updated regarding a Release.

3. Move to the Item Types tab
4. Click Edit
5. Select Add and set the Reason to Update
6. Within the Find Item Type field, search for Exchange
7. Click on the Exchange link to add it to the Release
8. Upload Media Attachments, if relevant

If an electronic upgrade file is to be used for the upgrade, it can be uploaded within the Media Attachment field. This would then be made available within the Deployment Task associated with the Release.

9. Enter information that is to be updated on the Details tab of the Item being updated

These will automatically be updated in the CMDB when the Deployment Task moves from Open to Closed-Resolved.

**Release - Update Microsoft Exchange**

Details    **Item Types**    Analysis    Elements    Deployments

**Details**

Item Type Exchange

Reason Update

Media Attachment

**Fields**

Location

Environment

Version # 2010

License Key

License Count

License Expiry

Ownership

Order #

Supplier

Supply Date

Find Item Type (Name)

Cancel Save

- Click Save and Save again.  
Move to the Analysis Tab.

## 1.54.6 Associating RFCs with the Release

Within the Analysis tab, the Release Manager can access a list of existing RFCs that are yet to be associated with the Release. To add an existing RFC to the Release, the checkbox is marked next to the Request # link, and the Add button is clicked. The RFC no longer appears in the Analysis tab, and is now visible in the Elements tab, where it can be removed if the association was made in error.

For this example, it is assumed no relevant RFCs exist in the system, so we move to the Deployments tab where the RFC will be created as a result of the Deployment.

To create the Deployment:

- Select the Deployments tab inside the Release information screen
- Click New

The screen expands to show the options for the type of deployment to be created, the list of Customers who own an Item associated with the Item Types included in the Release Types tab and the Search Options box.

- Select the type of Deployment that is to be created

For this example, a per Org. Unit Deployment will be created as the Item associated with the Release has shared ownership. When selected, the Organizational Unit associated with the Item that uses the Item Type associated with the Release is displayed in the Org. Unit. list.

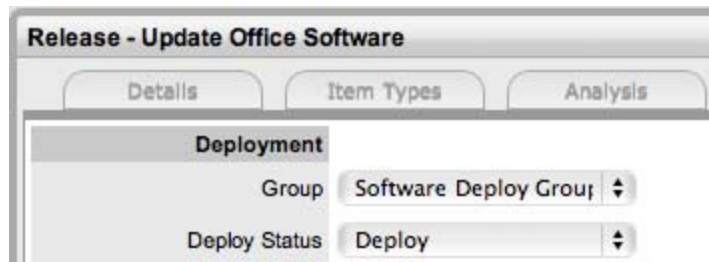


- Assign the Org. Unit by selecting the field next to the Org. Unit name and clicking

The selection is included in a Selected Org. Units window to the right of the main window. The group of Technicians who will action the Tasks and the Workflow State where the RFC will be created to manage the Deployment must be defined.

- Click Next
- Select the Group of Technicians who will work on the Deployment Tasks from the Group drop-down list

For this example the Software Deploy Group of Technicians will be assigned.

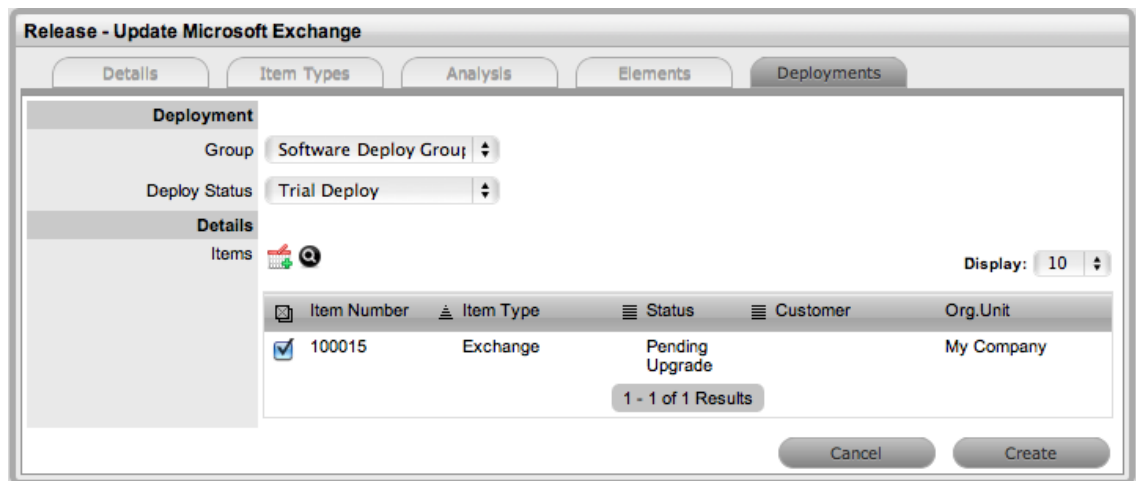


- Assign the stage of the Workflow where the RFC will be created for the Deployment


When the Release Workflow moves into the Deploy State, for this example, an RFC will be generated. This RFC will be assigned the Change Deployment Workflow and be assigned to the Change Team. When the RFC is assigned the Status of Deployed the Deployment Task will move from Pending to Open, allowing the Team member from within the Software Deploy Group of the Release Team to action the Deployment Task.

- Select the Item Type to be upgraded in the Deployment

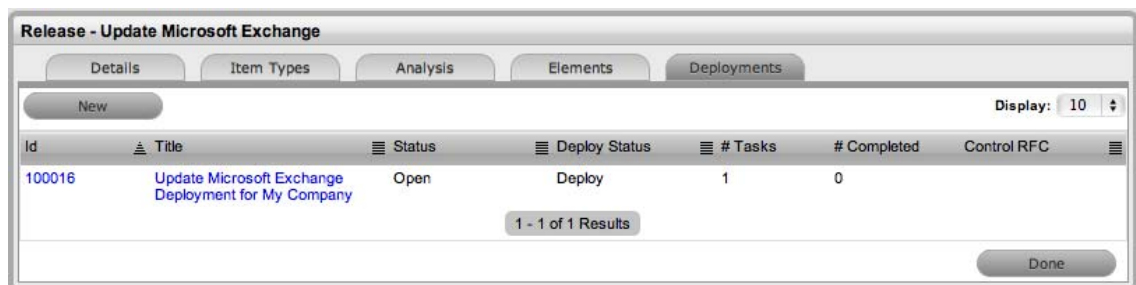
If an Item Type is not displayed in the list, click to search the CMDB.



9. Click 

The selection is displayed in the Select Items window to the right of the main window. If an incorrect assignment has been made, click .

10. Click Create



11. Click Done.

All Tasks are now saved with a Status of Pending assigned. When the Release Workflow moves to the Deploy State an RFC will be created. When the RFC hits the Release's RFC Control Deploy State the Tasks' Status will automatically be updated to Open, prompting Technicians to complete the Deployment Tasks and move the State to Closed-Resolved. When all Tasks are completed and moved to Closed - Resolved, the Release will be automatically Closed.


## 1.54.7 RFC Creation and Management

The Release Manager moves the Release through the lifecycle of the Workflow as activities are completed. For this example, within the Releases>Release#>Details tab the Release Manager has moved the Release through the Workflow States of Plan, Plan Approval, Build, Test and is currently assigned the State of Deploy Approval. Selecting Accept will move the Release to Deploy, and an RFC will automatically be created.

**Change Request Information**

Customer Analysis Summary

Edit Add Note Print **Change Request # 100021**

|                  |   |                       |  |
|------------------|---|-----------------------|--|
| <b>Contact</b>   |   | <b>Notification</b>   |  |
| Customer         | Simone Supervisor   | Customer              | None   |
| Org Unit         |   | Customer CCs          |  |
| Phone            |   | Technician            | None   |
| Local Time       | Tue, 21 Jun 2011 19:33:12                                     | Technician CCs        |  |
| GPS              |   | <b>Change Request</b> |  |
| <b>Item</b>      |   | Team                  | Change Team  |
| Type             | Unknown   | Workflow              | Change Deployment Workflow  |
| Status           |   | Status                | Pending  |
| Criticality      |   |                       |  |
| Room             |   |                       |  |
| <b>Details</b>   |   |                       |  |
| Classification   | General   |                       |  |
| Urgency          | Moderate  |                       |  |
| Impact           | Moderate  |                       |  |
| Priority         | Medium  |                       |  |
| Escalation       | <input checked="" type="radio"/> On <input type="radio"/> Off |                       |  |
| Escalation Layer | Default Group   |                       |  |
| Technician       | Simone Supervisor   |                       |  |

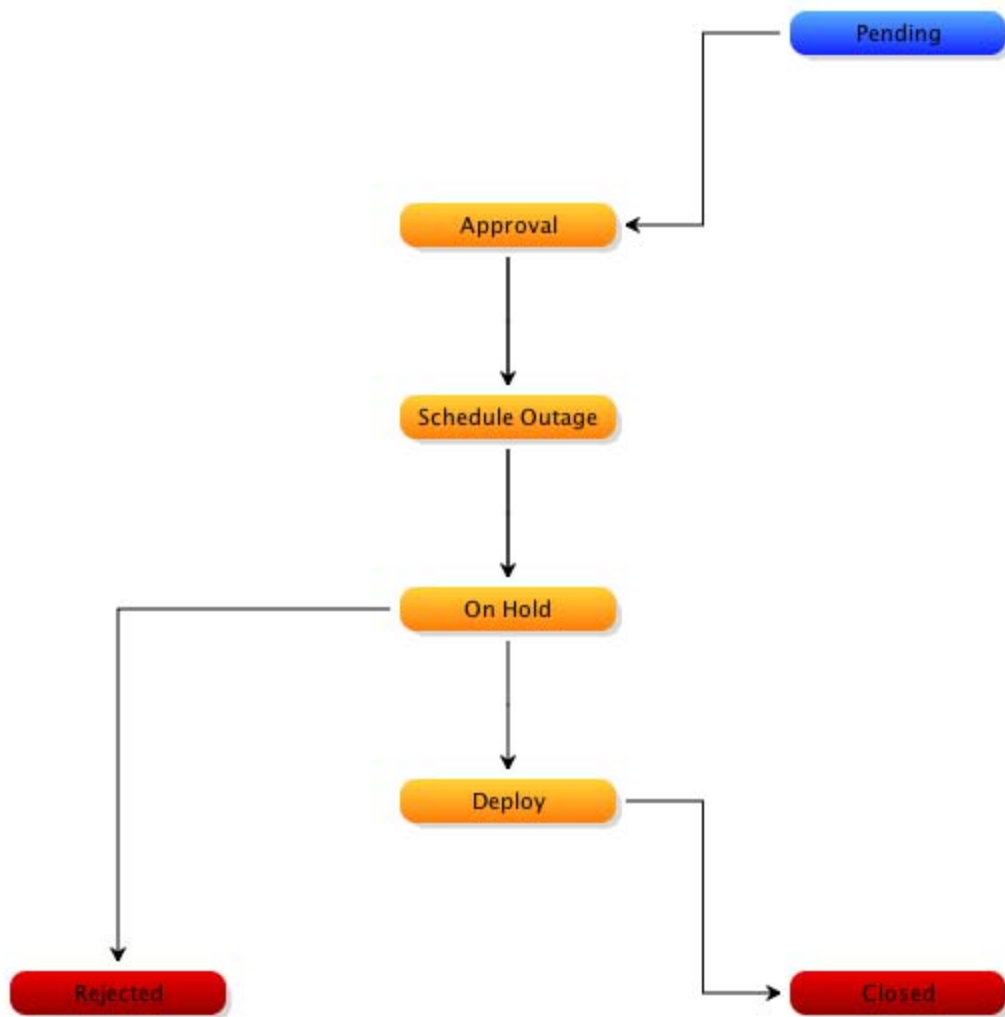
Description Notes Attachments Impact Audit Trail

Subject: Change Control of Update Microsoft Exchange Deployment for My Company

Description: This is the Change Request to control the deployment process.

Cancel Done

From the above RFC, we can see that the Change Team has been assigned the RFC, and they will move the Request through the Change Deployment Workflow.



This Workflow includes the stages of Pending>Approval>Schedule Outage>On Hold>Deploy>Closed. When the RFC is assigned the Deploy State, the Deployment Tasks created in the Release, and now available in the Change>Deployment Tasks tab, will move automatically move from Pending to Open, and the assigned Technician can action the Task before moving the Deployment Task State to Closed - Resolved.



**Deployment Task Information**

Summary

**Deployment Task # 100024**

| Item      |                 | Release     |                       |
|-----------|-----------------|-------------|-----------------------|
| Number    | 100015          | Workflow    | Release Workflow      |
| Type      | Exchange        | Team        | Release Team          |
| Version # | 2007            | Manager     | Simone Supervisor     |
| Status    | Pending Upgrade | Status      | Deploy                |
| Reason    | Update          | Details     |                       |
| Affects   |                 | Group       | Software Deploy Group |
| Org. Unit | My Company      | Technician  | Carla Parsons         |
|           |                 | Status      | Closed - Resolved     |
|           |                 | Next Status | Open                  |
|           |                 | FSC Date    |                       |

When the Task Status is set to Closed-Resolved, the updated Details contained in the Release will automatically be updated on the relevant Item in the CMDB. The Change Manager can view all Deployment Tasks related to the RFC within the RFC Summary screen, and when all Tasks are moved to Closed-Resolved the Change Manager can close the related RFC. When the Deployment Task is completed, the Deployment within the Change > Deployments tab is automatically closed by the system.

**Deployment - Update Microsoft Exchange Deployment for My Company**

Details Tasks

Name Update Microsoft Exchange Deployment for My Company

Release Update Microsoft Exchange

Group Software Deploy Group

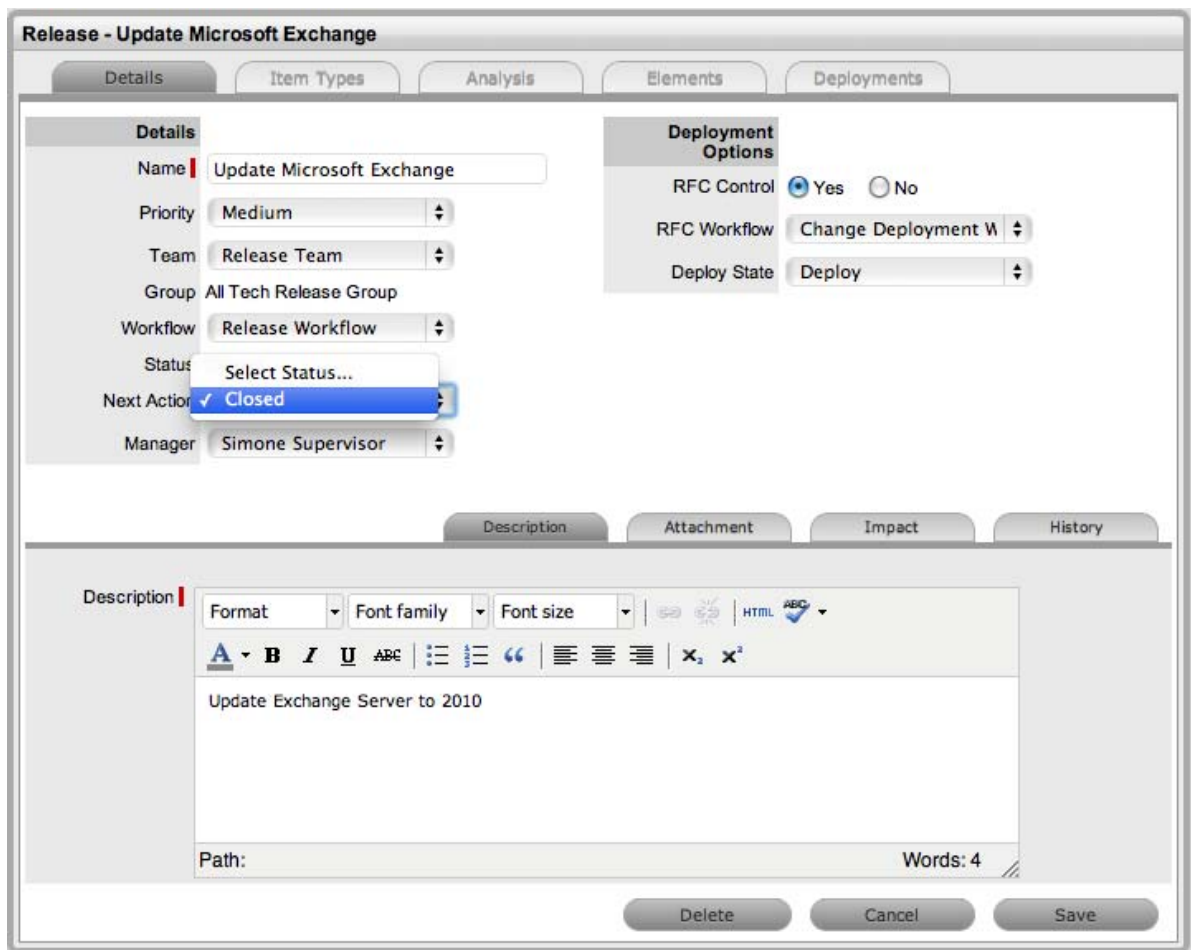
Deploy Status Deploy

Priority Medium

Status Closed - Resolved

Control RFC 100025

When the Deployment is closed for a Release, the Release Manager can close the Release within the Details Tab, by moving the Release Workflow Status to the Exit State.



## 1.55 Release Workflow

Release Workflows define the sequence of States to be followed for Releases logged within the Change>Release tab. By default the system includes one Release Workflow that can be adjusted to suit the service organization's requirements. There is no limit to the number of fully configurable Release Workflows that can be created in the system, so the diverse range of business release implementations required by an organization can be covered by the service and support organization.

### 1.55.1 Approval States

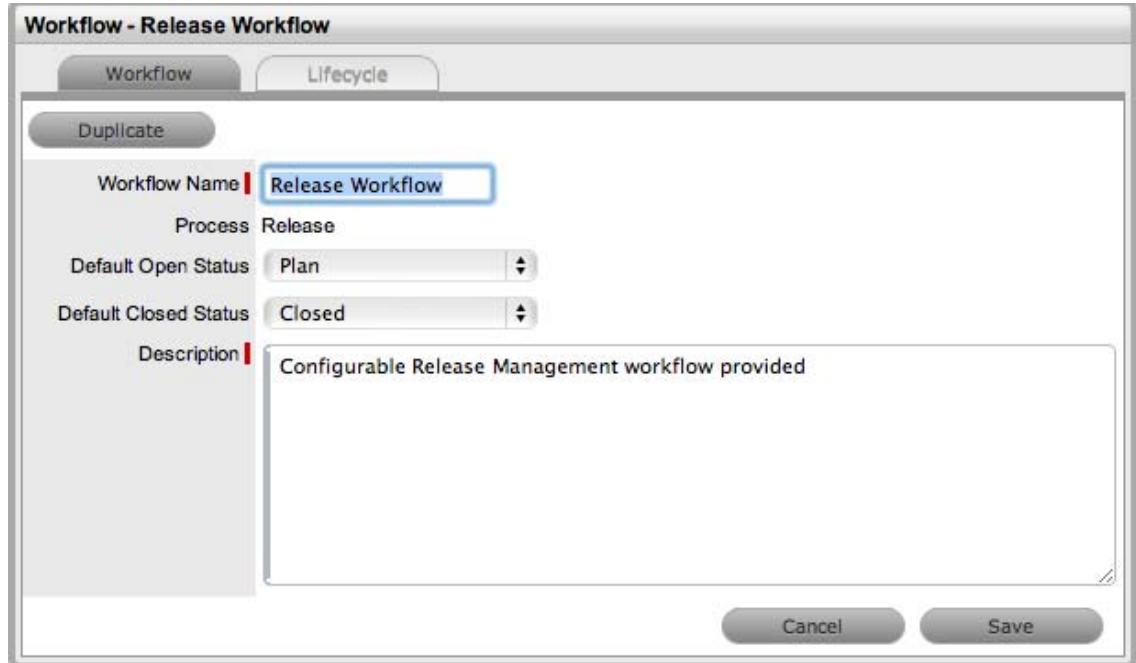
Approval States in Release Workflows provide the facility for Release Managers that have been assigned to the Approval State, to accept or reject Release activity. If Release Managers are to be assigned to an Approval State, then it is not possible for other User Roles to also be assigned to that State. It should be noted that a Technician, Supervisor or Partner user can also be assigned a Manager Role, which will allow them to be assigned to Manager Only Approval States.

For more information about Manager assignment to Approval States, see: [Release Teams](#).

## 1.55.2 Editing the Default Workflow

To edit or duplicate the default Release Workflow:

1. Select Service>Workflows
2. Click the Release Workflow hyperlink to modify the template details or copy the Workflow



3. Click Edit, to amend or duplicate the Workflow

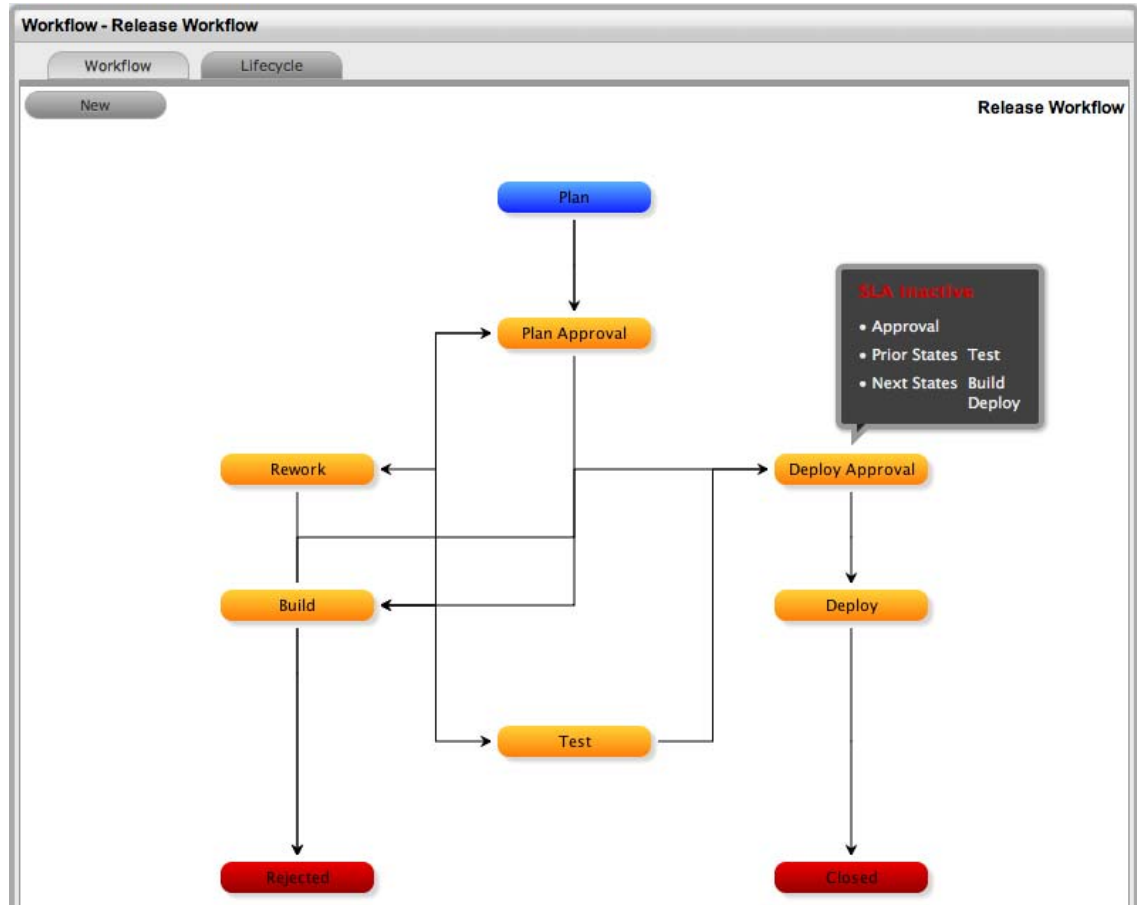
Fields in the following table are now editable

4.

| Field Name            | Description  |
|-----------------------|--|
| Workflow Name         | Enter a relevant name for the Workflow.  |
| Process               | Release Management is assigned as the Workflow Process.                                  |
| Default Open Status   | The open State that a Release automatically applies when it is assigned the Workflow.    |
| Default Closed Status | The Exit State that indicates the Release has reached the end of the Workflow Lifecycle. |
| Description           | Defines the purpose of the Workflow.   |

5. Click Duplicate, if the default Workflow is to be copied
6. Amend the Release Workflow details as required
7. Click Save

8. Select the Lifecycle tab to create or modify Workflow States



### 1.55.3 Adding or editing Workflow States:

1. Click the State field in the Workflow map or State name hyperlink to display the Status information screen

Or, click New to create a new Workflow State.

---

## Status

|              |   |
|--------------|---|
| Name         | System Default States can be re-named if desired. For newly created States, enter a name.   |
| Active State | <p>Assign Yes for requests to be available in the Home tab by default, when assigned to this stage of the Workflow.</p> <p>Yes should be used for States where the User is actively working on the request or waiting for updates." No" generally applies to Workflow exit points and will only be available by default within the Release tab list view.</p> |

---

---

| <b>Status</b>    |  |
|------------------|--|
| Approval State   | <p>Sets the Status as an Approval State. This allows a Release Manager to be assigned to this State and enables them to approve or reject Release Activity when it moves into this stage of the Workflow.</p> <p><b>NOTE:</b> An Entry/Exit status cannot be an Approval State.</p>  |
| Deployment State | <p>If enabled for a State, when a Release is assigned this State the Deployment Tasks associated with the Release can be actioned by the Technician Users.</p>   |
| Entry Point      | <p>An Entry Point is used to indicate the start of a Lifecycle. To make the State a Workflow Entry Point, select the Entry Point checkbox.</p> <p>As the Entry Point is the first State, the Previous States field will be removed.</p>  |
| Exit Point       | <p>Select if the State will be an Exit Point. An Entry Point is used to indicate the end of a Lifecycle.</p> <p><b>NOTE:</b> A Workflow can have only one Entry Point but multiple Exit Points.</p>  |
| Has Notes        | <p>Allows the Supervisor to include instructions or add relevant details to the Workflow that is made available when the Release moves into the State. The information is configured within the Notes tab that is displayed when this option is enabled.</p> <p>Information and attachments included on the Notes tab, are displayed as a scroll-over when the Release moves into the State.</p>   |
| Listener Class   | <p>This field is visible if the Outbound Webservices option is enabled in the Admin&gt;Setup&gt;Privileges&gt;System tab.</p> <p>Complete this field, if assigning this State to a request is to trigger an event in an external system.</p> <p>This field should contain the name of a Java class that implements the interface <code>com.livetime.ws.listenWorkflowListener</code> that has been compiled into a jar file and added to the LiveTime classpath. Please contact support for further details.</p> |
| Previous States  | <p>If the State is not an Entry Point, Previous States can be assigned to the Workflow stage. Highlight the relevant State and use the arrow button to move Available States to the Previous States field. These options designate the Workflow stages a Release can come from, before it arrives in this Workflow State.</p>  |

---

---

**Status**

---

|              |  |
|--------------|--|
| Next States  | If the State is not an Exit Point, Next States can be assigned to the Workflow state. Use the arrow button to select the Next States from the Available States. These options are included in the Next Action drop-down menu of a Request.   |
| Accept State | (Visible when the Approval State option is Yes.)<br><br>Displays the States that a Request can move to when a Release action is Accepted. Select the appropriate State, for the system to automatically route the Release when the Accept option is selected.  |
| Approval     | (Visible when the Approval State or KBA Approval option is Yes.)<br><br>Displays the States that a Request can move to when a Request action is Accepted. Select the appropriate State, for the system to automatically route the Request when the Accept option is selected. <ul style="list-style-type: none"><li>◆ <i>Team Manager</i>, select if a single Manager User assigned to the Team is to process the Request.</li><li>◆ <i>Team Managers#</i> if selected, set the number of Managers that are required to Approve the Request before the system will automatically apply the defined Accept or Reject State.</li><li>◆ <i>Team Managers%</i> if selected, set the percentage weighting that must be achieved by Managers voting before the system will automatically apply the defined Accept or Reject State. When selected, define the percentage weighting.</li></ul> |
| Reject State | (Visible when the Approval State option is Yes.)<br><br>Displays the States that a Release can move to when a Release activity is Rejected. Select the appropriate State, for the system to automatically route the Release when the Reject option is selected.  |

- 
2. Configure the State details, as required
  3. Save the updated State details

---

**NOTE:** It is recommended that all States that are to be included in the Workflow be added or re-named now

After all States have been entered in the system, the mapping of the Workflow can be more easily achieved.

---

4. Continue to edit, add or delete States until all relevant States exist for the Workflow
5. To create the Workflow Lifecycle, States need to be assigned to the transitional states of Previous and/or Next

To move Available States to the Previous State or Next State field, open the Status Details screen by clicking the State object in the Workflow map or select the State hyperlink in the table beneath the Workflow map.

6. Assign States to be Next and/or Previous States

For the Current Status highlight an option in the Available State list and click the right-pointing arrow to move it to the Selected States field.

---

**NOTE:** When a State is used as a Previous and a Next State, it allows a request to move forward and backward in a Lifecycle

An Open State cannot have any previous States and a Closed State cannot have any Next States.

---

7. Click Save to return to the Workflow map and to access other States to build on the Workflow lifecycle.

8. Repeat Steps 12 to 14 until all transitional stages of the Workflow have been mapped.

---

**NOTE:** To successfully save a Workflow, the sum Resolution Time of the individual Contract Types assigned to each transitional state of the Workflow Lifecycle, must be less than or equal to the Workflow's SLA Resolution Time

---

9. Click Save.

The visual representation of the Workflow is displayed.

## 1.55.4 Workflow Map

The Workflow Map is a visual representation of the Workflow Lifecycle. The map displays the relationship between each Lifecycle State by using different colors to represent the type of Lifecycle State.

---

**Color**

---

|        |   |
|--------|---|
| Blue   | Indicates the Entry point of the Lifecycle. |
| Orange | Is a Transitional stage of the Lifecycle.   |
| Red    | Indicates the Exit point of the Lifecycle.  |

---

Detailed information about a Lifecycle State can be accessed by clicking on the State field within the Map.

## 1.55.5 Deleting the default Release Workflow

To delete the default Release Workflow:

1. Select Service>Workflow

The Workflows screen appears.

2. Select the checkbox to the left of the Release Workflow

3. Click Delete

The checked Workflow is no longer visible.

---

**NOTE:** A Workflow that belongs to a Team cannot be deleted.

---



## 1.55.6 Deleting a Workflow State

It may be necessary to delete a system default State or a State that is no longer in use. Note that a State cannot be deleted if it has been assigned to a Release.

---

**NOTE:** It is recommended that any States listed in the table of States included on the Life Cycle tab that are not included in the Workflow or used by the system, be removed from the table as all States included here are listed in the States tab when Workflow Manager assignment is being configured. By removing unused States from the table, assigning Technicians to the relevant stages of the Workflow becomes an easier task.

---

To delete an unused State:

1. Select Service>Workflows
2. Click on the Workflow hyperlink
3. Move to the Lifecycle tab
4. Select the State name link in the table of States included in the Lifecycle tab
5. Click Delete
6. Click Done.

## 1.56 Basic Procedures

All sections throughout the application use a uniform system for creating, editing and deleting elements. Whether you are working with requests, Customers, Items or Item Types, the procedure for creating, editing or deleting existing elements is the same.

### 1.56.1 Mandatory Fields

When entering details relating to any element throughout the system, required information is marked with a *I*.



The screenshot shows a web form titled "Customer Information" with three tabs: "Contact", "Aliases", and "Items". The "Contact" tab is active. Under the "Access" section, there are three input fields: "First Name", "Last Name", and "Username". Each field has a small red vertical bar to its left, indicating it is a mandatory field. The "First Name" field is highlighted with a blue border, and a red circle is drawn around the red bar. To the right of the "First Name" field, the text "Required Information" is displayed in red.

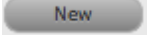
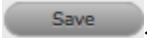
*I* Denotes Mandatory fields

### 1.56.2 Creating an Element

To create an element:

1. Navigate to the appropriate section

For example, if you want to create a Customer, navigate to the User>Customers section.

2. Click  in the upper left-hand corner of the list of Customers  
This will open a new Customer window.
3. Fill in the appropriate details
4. Click .

The new Customer now exists in the system and will appear in the list of Customers.

### 1.56.3 Editing an Element

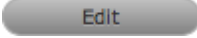
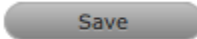
To edit an element:

1. Navigate to the appropriate section
2. Click the Entry link in the list

For instance, to edit a Customer, navigate to the User>Customers section and click on the Customer name hyperlink. This will open up the Customer's details screen.



| Customer Name                         | Email Address       | Phone        | Org. Unit          | Country   | Roles                             | Web Access |
|---------------------------------------|---------------------|--------------|--------------------|-----------|-----------------------------------|------------|
| <input type="checkbox"/> Dennis Barry | dennis@mycompany.co | 02 9797 9797 | MyCompany          | Australia | Customer                          | Disabled   |
| <input type="checkbox"/> Lena Benson  | lena@mycompany.co   | 03 9797 999  | MyCompany          | Australia | Customer                          | Disabled   |
| <input type="checkbox"/> John Brown   | john@mycompany.co   | 02 9797 9797 | MyCompany - Pink   | Australia | Customer                          | Enabled    |
| <input type="checkbox"/> Mary Calder  | mary@mycompany.co   | 03 9797 999  | MyCompany - Yellow | Australia | Technician<br>Manager<br>Customer | Disabled   |

3. Click  in the upper-left corner of the window to enter Edit mode
4. Update the necessary information
5. Click .

The changes will now take effect and the User will be returned to the list.

### 1.56.4 Deleting an Entry

To delete an entry:

1. Navigate to the appropriate section

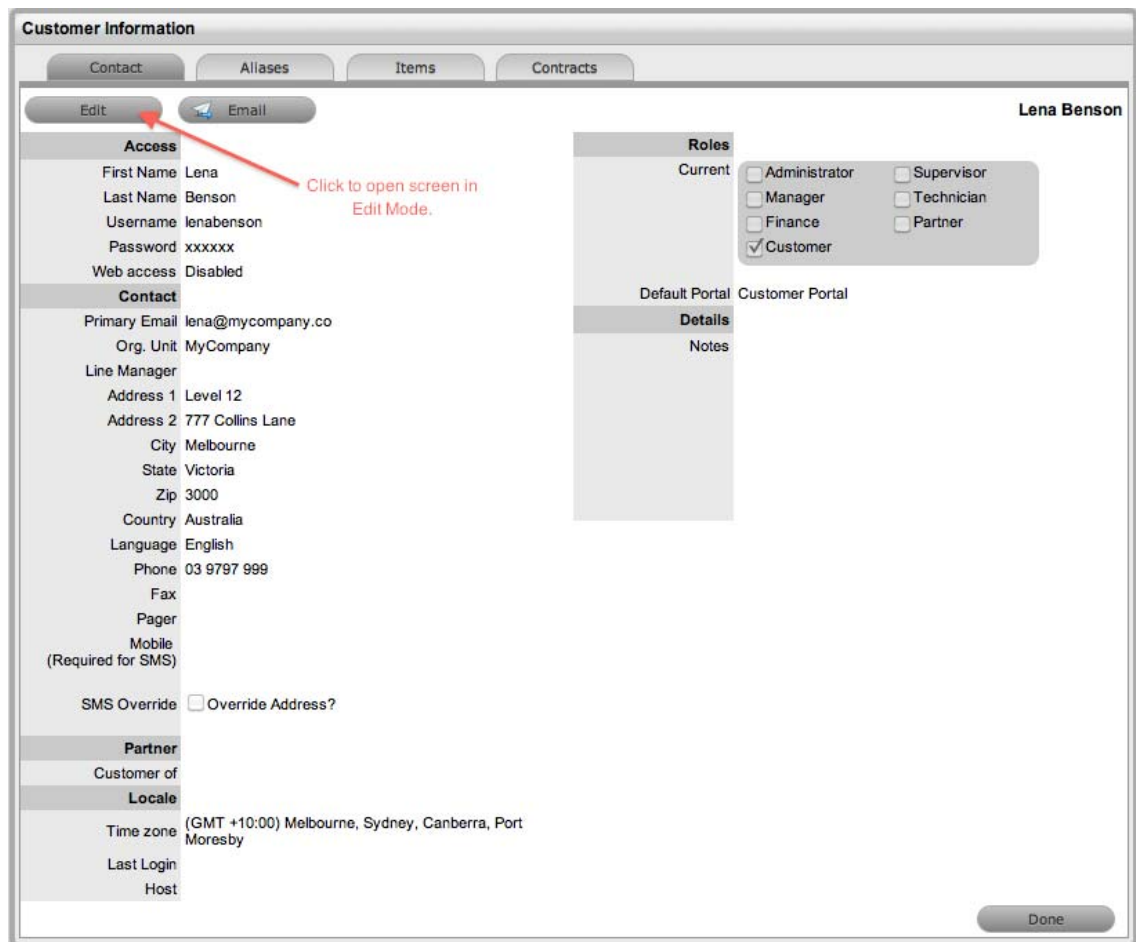
---

**NOTE:** Technicians do not have the ability to delete requests or Customers

---

1. Click the link in the list corresponding to the entry to be deleted

For instance, to delete a Customer, navigate to the User>Customers section and click on the Customer you want to delete. The Information screen opens.



2. Click **Edit** in the upper-left corner of the window to enter Edit mode
3. Click **Delete** at the bottom of the section.

The entry is now deleted and the User will be returned to the list.

## 1.56.5 Exporting to PDF and Excel

Most lists within the system can be exported to PDF and/or Excel. This functionality is available wherever the PDF and/or Excel buttons are visible.

---

**NOTE:** To customize the view of an Excel export, create a list view with the preferred columns, use the view and select the Excel button. See [List Views](#) for more information on customizing a list.

---

## 1.56.6 Formatting Print Views

Enable the print background setting on your web browser for better formatted and more User-friendly hard copies of request summary screens print views. Using Internet Explorer this setting is found in: Tools>Internet Options>Advanced>Printing>Print background colors and images.

## 1.57 List Views

Application List Views are pre-sorted by ID #, and default to display ten Incidents per batch. A List can be re-sorted by clicking on a column header, and the number of elements displayed per batch can be changed using the Display pop-up option.

List Views allow Users to customize the list displayed for each screen within the application. When a List View is created, the screen editor will display only the relevant columns for the module being customized. For example, when creating an Item List View, the available columns will include only Item information.


The system includes at least one default List View for each screen within the application. These Views cannot be edited, however additional Views can be created.

To access details regarding the List View field options throughout the application, refer to:

- ♦ [Home, Operations and Change tab](#)
- ♦ [Configuration tab](#)
- ♦ [Users tab](#)
- ♦ [Knowledge tab](#).

### 1.57.1 Create a List View:

As an example we will create a List View for the Incident screen.

1. Select Operations>Incident  
The Incidents screen appears
2. Select  available on the far right of the screen
3. Click New

The screenshot shows a 'Views Editor' dialog box. At the top, there is a 'Name' field with a blue border. Below it, the 'Shared' section has three radio buttons: 'No' (selected), 'By Role', and 'By Team'. The main area contains 15 columns, each with a dropdown menu. Column 1 is set to 'Request #', while columns 2 through 15 are set to 'Not Included'. At the bottom of the dialog are two buttons: 'Cancel' and 'Save'.

4. Enter the View Name and specify if the View is to be shared by other Users or between Team members

Shared Views allow other Users to apply the List View to their screen but does not permit them to edit it.

5. Select at least 8 columns

This only applies to the request list screens, all other screens require at least 6 columns.

6. Click Save.

---

**NOTE:** Create a List View that includes New Tasks and New Notes to use as the default request screen in order to have a visual cue when new Notes and requests are created.

---



## 1.57.2 Selecting a List View as the Default View

To use the same List View each time a screen is displayed, select the List View to be the default view. To do this:

1. Select , displayed on the far right of the screen
2. Click the button in the Default column
3. The icon will then change to a , indicating that it has become the default
4. Select Done to view this List.

From this point, this will be the default List View for the selected screen.

## 1.57.3 Displaying a Different List View

To use a different List View:

1. Select , displayed on the far right of the screen
2. Select the link in the Use View column.

## 1.57.4 Editing a List View Column

To edit a List View, and change the columns:

1. Select , displayed on the far right of the screen
2. Select the link in the View Name column
3. Make the required changes
4. Click Save.

## 1.57.5 Duplicating a List View

To fast-track the creation of similar List Views, a List View can be duplicated. To duplicate a List View:

1. Select , available on the far right of the screen
2. Click the checkbox beside the View Name to duplicate
3. Click the Duplicate button


The List View Editor appears with the columns of the original List View.

4. Complete the List View name
5. Modify the columns as required
6. Click Save.

To access details regarding the List View information options throughout the application, refer to:







- ♦ [Home, Operations and Change tab](#)
- ♦ [Configuration tab](#)
- ♦ [User tab](#)
- ♦ [Knowledge tab](#).

## 1.58 List View Options for all Request Types



The List View options are derived from the database fields and can be customized by selecting  within the My Tasks Home tab, Service Request, Incident or Problems screens within the Operations tab and the Change tab list view.

The options within the Home, Operations and Change tabs are detailed in the following table:

|                    | Description  |
|--------------------|--|
| # Attachments      | Displays the total number of Attachments assigned to the request.  |
| # Notes            | Displays the total number of Notes assigned to the request.  |
| % SLA Remaining    | Displays the percentage of time available before the SLA expires.  |
| Classification     | Shows the Classification assigned to the request.  |
| Client Room        | Displays the Room where the Customer can be located.   |
| Close Date         | Specifies when the request was first moved into an Exit State of the Workflow.   |
| Created            | The date when the request was first logged with the system.  |
| Customer           | The name of the person for whom the request was logged in the system.  |
| Customer Item      | The identification number of the Configuration Item associated with the Customer. (This is especially relevant when Item Shadowing is enabled for the Customer Portal and a request is logged against an Item that is different to the Customer's Item.) |
| Customer Item Type | The Item Type associated with the Customer Item.   |
| Customer Solution  | Shows the Customer Note when they use the Close option on the Customer Portal.   |
| Description        | Displays the initial information logged for the Customer's request.  |


|                    | Description   |
|--------------------|---|
| Due Date           | Typically based in the SLA and Priority assigned to the request, but in some cases may be manually overwritten.   |
| Escalation         |  is visible when the Escalation option is On for the request.  |
| Group              | Displays the Group identification number, if the request is assigned to a request group.  |
| IP                 | Shows the ITIL process that the request belongs to:<br> Incident Management;<br> Problem Management;<br> Change Management;<br> Request Fulfillment |
| Identifier         | Shows the Identifier field information of the Item assigned to the request.   |
| Impact             | Shows the Impact associated with the request. This is usually derived from the Criticality of the Item, but can be adjusted manually on a request.  |
| Item               | Shows the identifying number of the Item assigned to the request.   |
| Item Category      | Shows the Category name of the Item assigned to the request.  |
| Item Criticality   | States the Criticality of the Item as defined in the CMDB.  |
| Item Room          | Displays the Room details to which the Item is assigned.  |
| Item Status        | Displays the stage of the Item Lifecycle that the Item is assigned.   |
| Item Type          | Shows the Type name of the Item assigned to the request.  |
| Last Action        | Details the date that action was last recorded against the request.   |
| Layer              | Details the Escalation Layer/level or work group assigned to the request.   |
| Logged Time (mins) | Shows the total time recorded against the request.  |
| Logged by          | Shows the name of the person logged the request with the system.  |
| New Note           |  is visible when a new Note is added to a request and has not been opened by the assigned Technician.  |



|                          | Description   |
|--------------------------|---|
| New Task                 |  is displayed when a new request is added to the List View.                              |
| Number of Affected Users | Displays the number of Customers associated with the Item assigned to the request.  |
| Open Date                | Details the date the request was first logged in the system.  |
| Open Time                | Details the time the request was first logged in the system.  |
| Org. Unit                | The name of the Organizational Unit to which the Customer is assigned.  |
| Priority                 | Shows the Priority setting for the request.   |
| Request#                 | The identifying number for the request.   |
| Restore Date             | Shows the date the request was moved into a Workflow State where the SLA Restoration option is set to Yes.  |
| SLA                      | Displays the Service Level Agreement assigned to the request.   |
| Source                   | Displays if the request was created via Email, Portal, Widget, Phone (Technician) or Web Service.   |
| Status                   | Shows the stage of the request Workflow that the request is assigned.   |
| Subject                  | Shows content entered in the Subject field of a request. Usually derived for the Subject line of requests created via email, if not populated manually.                   |
| Team                     | Shows the Team assigned to the request.   |
| Technician               | Displays the name of the Technicians assigned to the request.   |
| Urgency                  | Shows the Urgency associated with the request.  |
| Warning Sent             |  is visible if an SLA Warning has been sent to the Technician assigned to the request. |
| Workflow                 | Details the Workflow assigned to the request.   |

If Custom Fields have been enabled for a Request Type in Admin>Setup>Custom Fields, they will also be available in the Views Editor drop-down list options.

## 1.59 List View Options: Configuration Tab

The List View options are derived from the database fields and can be customized by selecting  within the Configuration tab.

The options within the Configuration Tab are outlined in the following table.

|                       | <b>Description</b>   |
|-----------------------|--|
| # Users               | Displays the number of Users assigned to the Item.   |
| % SLA Uptime          | Displays the percentage uptime expectation of the SLA assigned to the Item.  |
| % Uptime              | Shows the actual uptime of the Item, based on the time the Item is associated with Active Lifecycle States.  |
| Avg Repair Time       | Entries displayed here are automatically calculated based on the average length of time an Item is offline.  |
| Avg Time to Fail      | Figures displayed here are automatically calculated based on the average time between an Item being offline.   |
| Change Team           | Shows the Change Team assigned to the Item.  |
| Child R'Ships         | Displays the number of Child Relationships associated with the Item.   |
| Contract              | Displays the Contract Number associated with the Item.   |
| Contract End Date     | Displays the date a Service Contract period ended.   |
| Contract Expiry       | Shows the date that a Service Contract is due to expire.   |
| Cost                  | Displays the value entered in the Costs field.   |
| Criticality           | States the Criticality of the Item as defined in the CMDB.   |
| Current Month Costs   | Uses the Charges figure within the Service Item Costs tab, multiplied by the number of Users and days of month passed, to calculate the month to date cost figure.     |
| Current Month Revenue | Uses the Revenues figure within the Service Item Costs tab, multiplied by the number of Users and days of month passed, to calculate the month to date revenue figure. |
| Customers             | Lists Customers assigned to the Item.  |
| Deleted Date          | Shows the date the Item was deleted from the CMDB.   |
| Depreciated Value     | Displays the figure entered in the Depreciated Value.  |
| Identifier            | Shows the Identifier field information of the Item assigned to the request.  |
| Incident Team         | Shows the Incident Team assigned to the Item.  |
| Item Category         | Shows the Category associated with the Item.   |
| Item No.              | Displays the identifying number for the Item.  |
| Item Type             | Shows the Item Type associated with the Item.  |
| Manufacturer          | Displays the Manufacturer name.  |

|                        | Description   |
|------------------------|---|
| Open Requests          | Shows the number of requests assigned an Active Status, associated with the Item.                                   |
| Org. Units             | Lists the Org. Units associated to the Item.  |
| Parent R'Ships         | Displays the number of Parent Relationships associated with the Item.   |
| Previous Month Costs   | A reference figure for an average monthly cost, based on the previous months costs for the Service Item.            |
| Previous Month Revenue | A reference figure for an average monthly revenues, based on the previous months revenue for the Service Item.      |
| Problem Team           | Shows the Problem Team assigned to the Item.  |
| Purchased              | Displays the date entered in the Purchased field.   |
| Request Team           | Shows the Service Request Team assigned to the Item.  |
| Room                   | Displays the Room associated with the Item.   |
| Service Components     | For Service Items, the Item Number and Type is displayed for other Service Items related as Children for this Item. |
| Service Level          | Shows the Service Level Agreement assigned to the Item.   |
| Status                 | Displays the stage of the Item Lifecycle that the Item is assigned.   |

## 1.60 List View Options: Users Tab

The List View options are derived from the database fields and can be customized by selecting  within the Customers, Organizational Units, Partner Organizations and Users tab.

The options within the Users Tab are outlined in the following tables:

### 1.60.1 Customers List View options:

| Customers     | Description  |
|---------------|--|
| Contract #    | Displays the Contract Number associated with the Customer.   |
| Country       | Shows the Country assigned to the Customer's account.  |
| Custom 1 to 5 | Shows the Custom Fields that have been configured in the <a href="#">Admin&gt;Setup&gt;Custom Fields</a> tab for Customer Information. |
| Customer Name | Displays the Customer's name.  |




| <b>Customers</b> | <b>Description</b>  |
|------------------|---|
| Date Added       | Displays the date the Customer account was first created.   |
| Email Address    | Shows the Customer's email address as a link that can be clicked to open a New Message email window.  |
| Email Locale     | Displays the language file associated with the Customer for automated system correspondence.  |
| FAX              | Includes the Customer's facsimile number.   |
| Last Login       | States the time and date when the Customer last logged into the system.   |
| Last Logout      | States the time and date when the Customer last logged out of the system.   |
| Ldap Source      | When multiple LDAP servers are synchronized with the system, this will display the LDAP details from where the Customer information is sourced. |
| Line Manager     | Shows the name of Manager User associated with the Customer, which maybe relevant when seeking approvals for Service or Change Requests.        |
| Local Time       | Displays the local time for the Customer.   |
| Mobile           | Includes the Customer's mobile number.  |
| Notes            | Displays information recorded in the Notes field of the Customer Information screen.  |
| Open Requests    | Shows the number of requests assigned an Active Status, logged by the Customer.   |
| Org. Unit        | Displays the Organizational Unit assigned to the Customer.  |
| Owned Items      | Lists the Item's assigned to the Customer by showing the Item Numbers.  |
| Pager            | Includes the Customer's pager details.  |
| Phone            | Includes the Customer's telephone number.   |
| Roles            | Lists the Roles the Customer has been assigned within the system  |
| Room             | Displays the Room assigned to the Customer.   |
| User Name        | Displays the User Name access credentials for the Customer's account.   |
| Web Access       | Shows the Customer setting for the Web Access option.   |

## 1.60.2 Organizational Units and Partner Organizations List View options:

| Org. Units            | Description   |
|-----------------------|---|
| # Customers           | Shows the number of Customers associated with the Org. Unit.  |
| City                  | Shows the City details for the Org. Unit.   |
| Contract #            | Displays the Contract Number associated with the Org. Unit.   |
| Country               | Shows the contact telephone number for the Org. Unit.   |
| Custom 1 to 5         | Shows the Custom Fields that have been configured in the <a href="#">Admin&gt;Setup&gt;Custom Fields</a> tab for Org. Unit Information. |
| Name                  | Details the Organizational Unit's name.   |
| Org Unit Email        | Shows the Org Unit's email address as a link that can be clicked to open a New Message email window.                                    |
| Phone                 | Shows the contact telephone number for the Org. Unit.   |
| Primary Contact       | Shows the name of the Customer who has been assigned as the point of contact for the Organizational Unit.                               |
| Primary Contact Email | Shows the Primary Contact's email address as a link that can be clicked to open a New Message email window.                             |
| Service Level         | Displays the Service Level Agreement assigned to the Org. Unit.   |
| State                 | Displays the State information for the Org. Unit.   |
| Website               | Displays the Org. Unit's Website details.   |
| Zip                   | Shows the contact telephone number for the Org. Unit.   |


## 1.60.3 Users List View options:

| Users           | Description  |
|-----------------|--|
| Active Requests | Shows the number of requests assigned an Active Status, allocated to the User. |

| Users           | Description   |
|-----------------|---|
| Available       | <p data-bbox="870 218 1414 275">Includes a visual icon to easily identify if the User is available within the system for request allocation:</p> <p data-bbox="870 302 1414 394">  : The User is not on leave and is available for request assignment based on their assigned work hours. </p> <p data-bbox="870 422 1414 514">  : The User is not on leave but is not available for request assignment based on their assigned work hours. </p> <p data-bbox="870 541 1414 575">  : The User has the On Vacation option enabled. </p> |
| Classifications | Lists any Item Classifications that have been assigned to the User within the Skills tab.   |
| Custom 1 to 5   | Shows the Custom Fields that have been configured in the <a href="#">Admin&gt;Setup&gt;Custom Fields</a> tab for User Information.  |
| Date Added      | Displays the date the Customer account was first created.   |
| Default Items   | Lists any Items that have been assigned to the User within the Skills tab.  |
| Default Portal  | For Users assigned multiple Roles within the system, this field will display which Portal the User accesses by default when they log into the system.   |
| Email Address   | Shows the User's email address as a link that can be clicked to open a New Message email window.  |
| FAX             | Includes the User's facsimile number.   |
| Last Login      | States the time and date when the User last logged into the system.   |
| Last Logout     | States the time and date when the User last logged out of the system.   |
| Ldap Source     | When multiple LDAP servers are synchronized with the system, this will display the LDAP details from where the User information is sourced.   |
| Line Manager    | Shows the name of Manager User associated with the User, which maybe relevant when seeking approvals for Service or Change Requests.  |
| Mobile          | Includes the User's mobile number.  |
| Name            | Shows the User's name.  |
| Pager           | Includes the User's pager details.  |
| Phone           | Shows the contact telephone number for the User.  |
| Processes       | Lists the ITIL Processes the User has access to within the system.  |

| <b>Users</b> | <b>Description</b>   |
|--------------|--|
| Roles        | List the Roles the User has been assigned within the system.                   |
| Supervisor   | Shows the assigned Supervisor for Users assigned a Technician or Partner Role. |
| Teams        | Lists the service Teams the User has been assigned to.                         |
| Username     | Displays the User Name access credentials for the User's account.              |

## 1.61 List View Options: Knowledge Tab

The List View options are derived from the database fields and can be customized by selecting  within the Knowledge Tab.

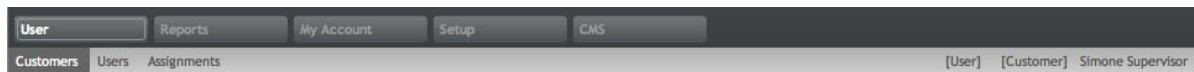
The options within the Knowledge Tab are outlined in the following table:

|                | <b>Description</b>  |
|----------------|---|
| Age            | Based on when the content was created, shows the age of the Article or FAQ.   |
| Article No.    | The identifying number for the Article or FAQ.  |
| Classification | Shows the Item Classification assigned to the Article or FAQ.   |
| Created        | Displays the date when the Article or FAQ was created.  |
| Custom 1 to 5  | Shows the Custom Fields that have been configured in the Admin>Setup>Custom Fields tab for Customer Information.                    |
| Item Type      | Shows the Item Type assigned to the Article or FAQ.   |
| Last Updated   | Displays when the Article or FAQ was last updated.  |
| Mean Rating    | Displays the mean score rating for helpfulness of the Article or FAQ.   |
| Owner          | The User who created the Article or FAQ.  |
| Status         | Details the stage of publication the Article or FAQ is assigned (i.e., In Development, Pending Publication, Published or Archived.) |
| Summary        | Shows the information recorded in the Summary field of the Article, or the Question field of an FAQ.                                |
| Title          | Displays the Article Title.   |
| Type           | Shows the Item Type assigned to the Article or FAQ.   |
| View Date      | Displays when the Article or FAQ was last viewed.   |
| Views          | Details the number of times the Article or FAQ has been viewed by a Customer.   |

|            | Description   |
|------------|---|
| Visibility | Shows who can access the Article or FAQ in the Knowledge Base.      |
| Votes      | Shows the total number of votes recorded against an Article or FAQ. |

If Custom Fields have been enabled for a Articles in Admin>Setup>Custom Fields, they will also be available in the Views Editor drop-down list options.

## 1.62 Administrator View



Users with the Administrator Role can configure the customized settings within the application, enable or disable privileges and control the synchronization with third party tools.

The Administrator view has five tabs:

- ♦ [User](#) - Allows the User to create accounts for Users and Customers, and also define User assignment templates for adding Users to multiple Teams and Escalation layers within the User Information screen
- ♦ [Reports](#) - Provides the Administrator with real time System and Login reports. System logs can also be downloaded in the screen
- ♦ [My Account](#) - The Administrator can view and configure their account details or create Alerts
- ♦ [Setup](#) - Allows the Administrator to define how Customers and Users can interact with the system, customize the application and synchronize it with third party tools
- ♦ [CMS](#) - Provides configuration access to Relationship Types, Warranty Durations and the Incident Analyzer, for Problem Management.

If an Administrator is assigned other User Roles within the system, they can access the Admin Portal when logged in using the different Role, by selecting the Setup link within the sub-menu bar of the User login screen or the Customer Portal Menu options.

## 1.63 User



The User tab is used to create, modify and view accounts for:

- ♦ [Customers](#)
- ♦ [Organizational Units](#)
- ♦ [Users](#)
- ♦ [Teams.](#)

Users within the service management system can have one of the following Roles:

- ♦ [Technician](#)



- ◆ [Supervisor](#)
- ◆ [Partner](#).

and one or more of:

- ◆ [Administrator](#)
- ◆ [Finance](#)
- ◆ [Manager](#)
- ◆ [Customer](#).

If a User is assigned multiple Roles, the User Roles of Supervisor or Technician, Finance and Manager are consolidated within one User view. Therefore, if a User is assigned Finance, Manager and Supervisor/Technician access, they can view all functionality related to these Roles within the User view. If the User is also assigned Admin and Customer access, next to their login name, the options of Setup and Customer will be displayed. See [Changing Roles](#).

The Supervisor can create User accounts within the User >Users tab.

The system Administrator can synchronize the system with a Directory Server to import Customer and User details. Imported Users can only be modified through the appropriate server console, not via the application. For further details about this topic refer to the Authorization section within the Administrator Guide.

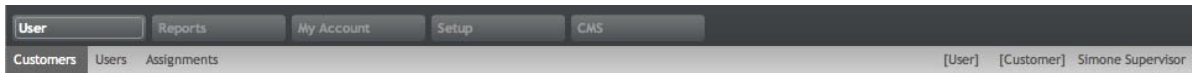
Alternatively, the Administrator can also import Customers via a .CSV file.



---

# 2 Users

## 2.1 User Tab



The User tab is used to create, modify details for:

- ◆ [Customers](#)
- ◆ [Users](#)
- ◆ [Assignments](#)

Users can be assigned one of the following Roles:

- ◆ Technician
- ◆ Supervisor
- ◆ Partner.

and one or more of:

- ◆ Administrator
- ◆ Customer
- ◆ Finance
- ◆ Manager.

When a User has more than one Role, they can switch between Roles easily by selecting the Setup, User or Customer link displayed in the sub-menu bar next to their login Name. See [Changing Roles](#).

### 2.1.1 User Availability

The User List View includes the User Availability status by default, this is based on work hours configured in the Schedule tab of the User and their Vacation Status.

The following icons may be displayed in the List View:

---

#### Available

---



The User is not on leave and is available for request assignment based on their assigned work hours.

---

---

**Available**

---



The User is not on leave but is not available for request assignment based on their assigned work hours.

Or, if no hours are set within the Schedule tab when the "Define Work Hours" is enabled within Admin>Setup>Privileges>User screen and the User is not on vacation, the system will consider Users to be unavailable.



The User has the On Vacation option enabled.

---

An Administrator can synchronize the system with a Directory Server to import User details. Imported Users can only be modified through the appropriate server console, not via the application. See [Authentication](#).

Alternatively, the Administrator can also import Customers via a .CSV file.

---

**NOTE:** If new User accounts are to be created directly in the system, new Administrator Users can only be created within the User tab of the Administrator Portal.

---

## 2.2 Customers

### 2.2.1 Customers

The Customers tab is used to create, modify and delete Customer Accounts within the system.

A Customer is a User assigned the [Customer Role](#). They can be internal or external to the organization. Customers can raise requests, update, and if relevant approve requests, through the Customer Portal or via email. Service Desk staff can also generate requests on behalf of the Customer.

Customers can be created within this tab, imported from a CSV file, or imported and synchronized using a directory server. See [Authentication](#).

---

**NOTE:** If Customers are imported using a directory server and the mixed mode authentication method is disabled, the option to create Customers within the Users tab is not available.

---

| <input type="checkbox"/> | Customer Name | Email Address       | Phone        | Org. Unit            | Country   | Roles                             | Web Access |
|--------------------------|---------------|---------------------|--------------|----------------------|-----------|-----------------------------------|------------|
| <input type="checkbox"/> | Dennis Barry  | dennis@mycompany.co | 02 9797 9771 | MyCompany - White    |           | Customer                          | Disabled   |
| <input type="checkbox"/> | Lena Benson   | lena@mycompany.co   | 02 9797 9789 | MyCompany - ICT Dept |           | Customer                          | Disabled   |
| <input type="checkbox"/> | John Brown    | john@mycompany.co   | 02 9797 9797 | MyCompany - Pink     | Australia | Customer                          | Enabled    |
| <input type="checkbox"/> | Mary Calder   | mary@mycompany.co   | 03 9797 999  | MyCompany - Yellow   | Australia | Technician<br>Manager<br>Customer | Disabled   |

If using Organizational Units (configured by a Supervisor User) or Customer Custom fields (configured by an Administrator User), it is recommended that these be configured prior to creating Customers.

See: [Creating a Customer Account \(Internal Authentication\)](#)

See: [Importing Customers Using a CSV File](#)

See: [Importing Customers using LDAP/Active Directory Server](#).

## 2.2.2 Creating a Customer (Internal Authentication)

Use the Customer Information Tab to view and edit Customer details. It is also possible to set Customer Roles, line managers and default login details.

### Creating a Customer Account

When creating a Customer, the following four tabs are available:

- ◆ Contact
- ◆ Aliases
- ◆ Items
- ◆ Contracts.

### Information Tab

This tab is used to enter contact information for a Customer, when creating a new customer account.

---

**NOTE:** If Custom Fields are to be created for Customer Information it is recommended that the Administrator complete the configuration prior to creating Users. See [Custom Fields](#).

---

To create a Customer account using internal system authentication:

1. Select User>Customers
2. Select New
3. The Customer Information screen appears, with the following fields:
- 4.

---

#### Customer Information Fields

---

Access

|             |  |
|-------------|--|
| Title       | If enabled, select the appropriate title from the drop-down options. (This field is displayed if the Enable Titles option is set to Yes in the Admin>Setup>Setup>Privileges>Customer tab.) |
| First Name* | Customer's First Name.   |
| Last Name*  | Customer's Last Name.  |
| User Name*  | The login User name credentials for the User. If this is imported via LDAP or Active Directory, it can not be edited. Otherwise, enter a Username. Note that the value must be unique.     |

---

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**Customer Information Fields**

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|                            |  |
|----------------------------|--|
| Password/ Confirm Password | <p>The Default Password is set to the Customer's email address or a random string can be enabled by the Administrator in Setup&gt;Privileges&gt;System. See <a href="#">Authentication</a>.</p> <p>Customers can reset their password from the Customer Portal, or a Service Desk User can reset it in the customer account details using the Reset Password button through the Customer&gt;Information tab.</p> |
| Web Access                 | Web Access allows Customers to view their account information and Incidents via the Customer Portal.   |
| Contact                    |  |
| Primary Email*             | The Customer's Email address. System messages are sent to this address.  |
| Send To                    | <p>This field becomes when alternate email addresses are entered on the Aliases tab.</p> <p>Select the most appropriate email address to be set as the default address applied to Customer correspondence. When the Send To field is set to an alias address, the Primary Email address is not included in the cc list, unless specified in the request Information tab cc list.</p>                             |
| Org. Unit                  | <p>The Organizational Unit, be it a Company or Department with which the Customer is associated.</p> <p>(Organizational Units are created by the Supervisor, in Users &gt;Organizational Units.)</p>   |
| Line Manager               | If relevant, assign a system user with the Customer Role who can approve/reject requests made by this Customer, as part of the Change Management or Service Request approval process. (This information can not be edited if the line manager details are set by the LDAP synchron.)   |
| Room                       | This field is visible if the Display Rooms option is set to Yes in the Setup>Privileges>Customer screen and there are Room details configured in Organizational Units.   |
| Address 1                  | First line of Customer's address.  |
| Address 2                  | Second line of Customer's address.   |
| City                       | Customer's city details  |
| State                      | Customer's State details. Options will be displayed for the State, once the Country is selected, if Regions are configured for the Country in the system.  |
| Zip/Postcode               | Customer's area code.  |

---

---

**Customer Information Fields**

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|              |  |
|--------------|--|
| Country      | Customer's country. The country selected will determine the time zone and state options for the Customer.  |
| Email Locale | Set the default language for email correspondence.   |
| Phone        | Enter Phone details.   |
| Fax          | Enter the Customer's fax number, if relevant.  |
| Pager        | Enter the Customer's pager details, if relevant.   |
| Mobile       | <p>A mobile number can be entered as a contact number or for use with SMS (Short Mail Service message). An SMS can be sent to notify the assigned Technician when a request is created.</p> <p>SMS Messaging options:</p> <ol style="list-style-type: none"><li>1. From the drop-down list, select the SMS Service Provider.</li><li>2. Override SMS Address. If your service provider does not appear in the list, click this checkbox and enter an alternate Service Provider.</li></ol> |
| SMS Override | Enter SMS Gateway override details for the Customer, if a number other than the one entered in the Mobile field is to be used to send/receive updates via SMS. Enter the complete SMS details in email address format, i.e., 000777891@smsgateway.provider.com.  |
| Partner      |  |
| Customer of  | <p>Nominate the Partner Organization associate with the Customer. This is an external service provider who manages the Customer's request.</p> <p>(The option is enabled by the Administrator in Setup Privileges&gt; Use &gt;Edit Customer Partner. The Partner Organizations are defined by the Supervisor in the User&gt;Partner Organizations tab.)</p>  |
| Locale       |  |
| Time zone    | The Customer automatically adopts the default Timezone set for the system. However, the Timezone can be manually adjusted here for the specific Customer.  |
| Last Login   | Auto-populated with the date the Customer last logged into the system.   |
| Host         | The IP address of the last login for the Customer  |
| GPS          | The GPS coordinates of the last known address for the Customer. (This field is displayed when the Record GPS option is enabled in Admin>Setup>Setup>Privileges>Customer tab.)  |
| Roles        |  |

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## Customer Information Fields

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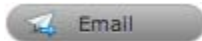
|                |   |
|----------------|---|
| Current*       | Multiple Roles can be assigned to a User. Select other Roles the Customer will use, by ticking the check boxes.<br><br>Note: If the Technician Role is selected, a Supervisor must be allocated.  |
| Default Portal | The Default Portal is the user interface a Customer, who is assigned multiple Roles, accesses by default when they log into the system.<br><br><b>NOTE:</b> If the Users Default Portal is set to Customer, the User details will not be accessible in the Users list, but included in the list within the User>Customer tab. |
| Details        |   |
| Notes          | Click on the field to enter any Customer relevant information.  |

---

\* Denotes mandatory fields

1. Click Done.

## Emailing Customers Credentials



To email a newly created Customer details regarding their system log in details, click the Email button within the Customer Information screen. If Random Passwords is enabled, selecting Email will reset the Password and forward the details to the Customer. If Password Questions is enabled in Setup>Privileges>System, selecting Email will send a link to the Customer directing them to a page that includes the security questions set for their account and reset the password based on the answers provided. Customers must complete this process within an hour of the email being sent.

## vCard Button



Select this option to download and open the Customer's information in an electronic business card format, to email or save outside the system.



## Aliases Tab

The Aliases tab is used to enter additional email addresses. Email addresses in the Aliases tab allow the Customer to send emails to the System or Team support addresses from more than one address. The system creates requests from these emails. Notifications for requests created using an address in the Aliases tab, are sent to the main email address and cc'd to the alias address that was used to create the request.

When one or more alias email addresses have been created for a Customer, a Send To field is displayed on the Customer Information screen, which allows the most appropriate email address to be set as the default address applied to Customer correspondence. When the Send To field is set to an alias address the Primary Email address is not included in the cc list, unless specified in the request Information tab cc list.



To add an alias email address:

1. Select User>Customers
2. Click on the Customer name  
The Customer Information screen appears.
3. In the Information tab, click Edit
4. In the Aliases tab, click Add
5. Enter an alias email address
6. Click Save
7. Select Done.

When an alias email address has been created for a Customer, a Send To field is displayed on the Customer Information screen, which allows the alias email address to be set as the default address applied to Customer correspondence.

To remove an alias email address, in Edit mode, tick the checkbox next to the relevant email address and then click Remove.

## Items Tab

The Items tab defaults to list of Items assigned to the Customer. To view Shared Items, tick the Include Shared option. To view the Item details, select the Item Number hyperlink. Select the Excel button to output the Item List to Excel format.



To add an Item:

1. Select User>Customers
2. Click on the Customer name  
The Customer Information screen appears.
3. In the Information tab, click Edit
4. In the Item tab, click Add  
The Find Item editor is displayed.
5. Search for the relevant Item  
For details regarding an advanced Item search see: [Advanced Search](#).
6. Select the Item # hyperlink  
The selected Item will be associated with the Customer.
7. Click Save
8. Select Done.

To remove an Item, in Edit mode, tick the checkbox next to the relevant Item and then click Remove.

## Contracts Tab

The Contracts tab displays a Customer's current contract status. A Customer can be assigned an SLA or Contract when Billing>Contracts is enabled. A Customer can only have one active Contract.



To create a new Contract for a Customer:

1. Select User>Customers
2. Select the Customer Name

3. Move to the Contracts tab

4. Click Edit

The system will display the Add button in the Customers tab

**Customer Information**

Contact Allases Items Requests **Contracts**

**Lena Benson**

**SLA Details**

Service Level

Contract # No Contract Assigned

Customers Items

| Contract #         | Type | SLA | Start Date | End Date |
|--------------------|------|-----|------------|----------|
| 0 - 0 of 0 Results |      |     |            |          |

Add Delete

Cancel Save

5. Click Add

The SLA options are displayed.

6. Select a Service Level from the list

When selected, the screen expands to display the Time, Start and End date fields.

**Customer Information**

Contact Allases Items Requests **Contracts**

**Contract**

Service Level Gold

| Priority | Response Time | Restoration Time | Resolution Time | 24 x 7 support | Alert  |
|----------|---------------|------------------|-----------------|----------------|--------|
| Urgent   | 6 Hours       | 12 Hours         | 24 Hours        | No             | Action |
| High     | 12 Hours      | 24 Hours         | 48 Hours        | No             | Action |
| Medium   | 18 Hours      | 36 Hours         | 72 Hours        | No             | Action |
| Low      | 24 Hours      | 48 Hours         | 96 Hours        | No             | Action |

Contract Type Per Customer

Time Time Limited Subscription

Support Hours

Start Date 05/25/11 23:53

End Date 05/24/12 23:59

Cancel Save

7. Define the Contract Time period

For the Per Customer Contract Type the Time Period for the Contract can be defined:

If *Subscription* is selected, the Start and End Dates are automatically completed by the system, but can be edited if required.

If *Time Limited Subscription* is selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually, entering the length of time for the subscription period.

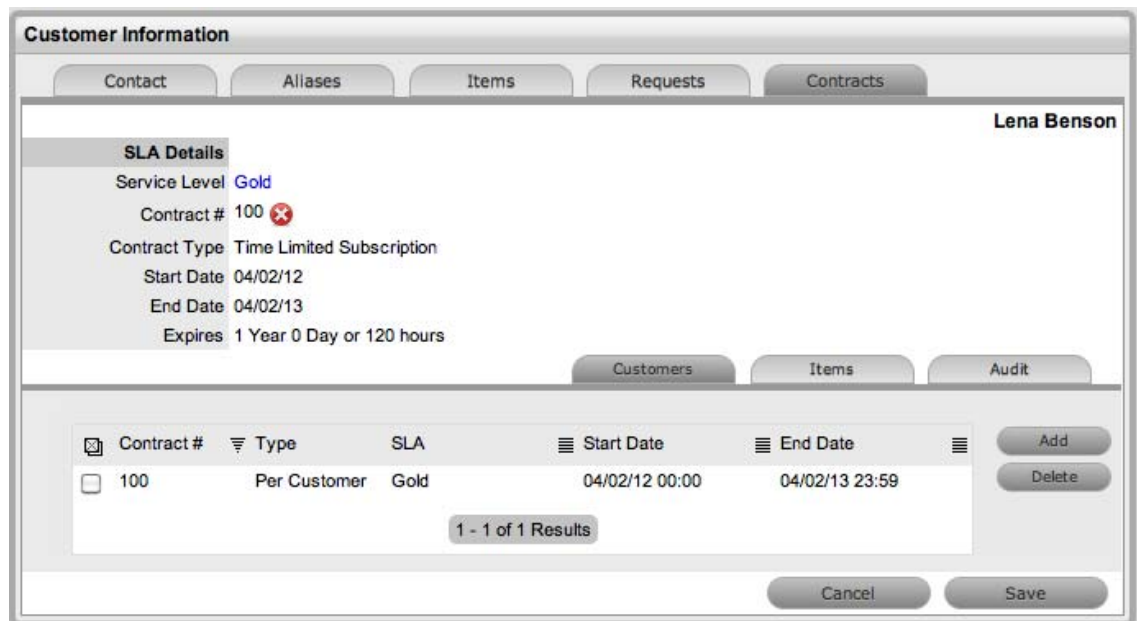
If *Support Hours* is selected, the number of support hours purchased by the Customers should be entered

If *Support Hours By Month* is selected, define the number of Support Hours covered per month and on which day of the month the Contract is designated as the Rollover Day. The Start Date and End Date fields are automatically completed as an annual contract subscription but can be edited, as required.

If the Start Date is set as a future date, the Pending Contract status is assigned. See [Pending Contracts](#).

8. Click Save
9. Click Next to continue

The system reverts to the Contracts summary screen.



10. Click Save. Click Done.

To delete a current Contract select  next to the Contract Number. Alternatively, to delete a current or queued Contract, within the Contract>Customers tab check the field next to the relevant Contract # and select the Delete button.

The Items tab within the Customer>Contracts screen is used to list all the Items with a Contract that are owned by a Customer.

The list of requests with the time recorded against the Contract is displayed within the Audit tab. The Summary view displays the list of requests with total number of Notes and Time allocated to the Contract, while the Detail view includes a breakdown of all Notes and the associated time related to each request.v

## Searching for Customers

To search for Customers within the Users>Customers tab:

1. Go to Users>Customer
2. Click



3. Enter any known Customer details  
Or, for a complete Customer list enter a before or after date for Customer creation
4. Click Search  
The results will be displayed in a table with the Customer Name and contact information.
5. Click on the Customer Name to open the Customer Information module or select the Email Address to send an email.

## Re-enabling Deleted Accounts

Administrators have the ability to reactivate deleted Customer accounts.

To enable a deleted account:

1. Within the User > Customers tab select



2. Toggle the Account Status option to Deleted
3. Click Search  
A list of deleted Customers is displayed.
4. Select a Customer to re-enable  
The Customer information page appears.
5. Click the Enable button, to reactivate the account.  
The Customer account becomes active and is available within the system.

### 2.2.3 Advanced Search Option

To search for a Customer or an Item based on custom field information, use the Advanced Search option. The Advanced Search enables the User to search on Customer or Item custom fields, if they have been enabled.

During request creation the option Advanced Search will be visible within the Find Customer and Find Item screens.

**Find Item**

Item Number

Item Type

Include Global\* Items

Active Items Only

All Items

All Assigned Items

By Customer

By Org. Unit

Category

Mobile Devices

Advanced Search

| Field                               | Value |
|-------------------------------------|-------|
| <input checked="" type="checkbox"/> |       |
| Resolution                          |       |
| Input Type                          |       |
| Memory                              |       |
| Memory Card                         |       |

To use the search option:

1. Tick the Advanced Search option

For the Find Customer, a custom field list will appear. For Find Item, an Item Category drop-down list is displayed.

2. For Find Item, select the Category. Two custom field lists appear
3. Select the custom field/s to search on

**Find Item**

Item Number

Item Type

Include Global\* Items

Active Items Only

All Items

All Assigned Items

By Customer

By Org. Unit


Category

Mobile Devices

Advanced Search

| Field       | Value                |
|-------------|----------------------|
| Memory Card | <input type="text"/> |
| IMEI Number | <input type="text"/> |

4. In the Value field, enter the details to be searched

5. Click  to return a list of Customers/Items based on the custom field value entered
6. Click the relevant Customer Name or Item number to assign it to the request.

## 2.2.4 Pending Contracts

Contracts that have been forward dated on creation or that require invoice payment before they can become active in the system, are recorded as Pending Contracts. The list of Pending Contracts can be viewed in the All Agreements filter within the Service Level > Contracts screen.

A Pending Contract will automatically become active in the system on the start date assigned to the contract, if an invoice is not associated with the contract.

To enable a Contract before the start date:

1. Go to the Costs tab of the Item or Contracts tab of the Org Unit or Customer

The tab is available relative to where the contract is being activated. It will be Costs within the Item screen, or Contracts within the Customer or Org Unit Information screen.

2. Select Edit

The Enable button is displayed next to the Pending Contract Field



3. Click Enable

The system prompts that the start date will be updated.

4. Click OK

The Contract is created with the new start date.



5. Click Save.

6. **NOTE:** Requests raised against a Customer/Org Unit/Item with a Pending Contract, are assigned a Pending-No Contracts status. The Item/Customer/Org Unit's Contract needs to be activated before a Technician can work on the request.

## 2.2.5 Importing Customers using a CSV File

Using a .CSV file (comma-delimited text file), Customers can be imported instantly.

The fields that are required within the text file for Customers to be imported are:

- ◆ First Name
- ◆ Last Name
- ◆ Email address
- ◆ Username (unique)
- ◆ Password.

To import Customers using a .CSV File:

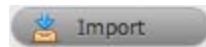
1. Select User>Customers

The Customers screen is displayed.



| Customer Name                         | Email Address       | Phone        | Org. Unit            | Country   | Roles                             | Web Access |
|---------------------------------------|---------------------|--------------|----------------------|-----------|-----------------------------------|------------|
| <input type="checkbox"/> Dennis Barry | dennis@mycompany.co | 02 9797 9771 | MyCompany - White    |           | Customer                          | Disabled   |
| <input type="checkbox"/> Lena Benson  | lena@mycompany.co   | 02 9797 9789 | MyCompany - ICT Dept |           | Customer                          | Disabled   |
| <input type="checkbox"/> John Brown   | john@mycompany.co   | 02 9797 9797 | MyCompany - Pink     | Australia | Customer                          | Enabled    |
| <input type="checkbox"/> Mary Calder  | mary@mycompany.co   | 03 9797 999  | MyCompany - Yellow   | Australia | Technician<br>Manager<br>Customer | Disabled   |

2. Click



The Customer Import Wizard appears.



**Customer Import**

**Welcome to the Import Wizard**

Select the CSV (Comma separated file) you wish to use for importing data. ([Download Template](#))

The following fields are required:

- First Name
- Last Name
- Email
- Username (Unique)
- Password

no file selected



To view a template that illustrates the fields the application is looking for and the data types (see below), click the Download Template link on the Customer Import Wizard screen.

The following fields should be visible:

Title (char 128), First Name(char 64), Last Name(char 64), Email Address(char 64), Company(char 64), Department (char 64), Primary Company Contact (int 1), Primary Department Contact (int 1), Address 1(char 128), Address 2(char 128), City(char 64), State(char 32), Postcode/ Zip (char 20), Country(char 64), Phone(char 20), Mobile(char 20), Fax (char 20), Pager (char 32), Username (Unique char 64), Password (char 64), Partners Email (char 64), Custom1(char 256), Custom2(char 256), Custom3(char 256), Custom4(char 256), Custom5(char 256), Notes (clob), Locale (char 5), Line Manager Username (char 128)

The 'char ###' designation in parentheses after each field name signifies what type of data the import utility expects to see in each field. For instance:

- ◆ 'First Name (char 64)' means that the first name field cannot exceed 64 characters.
- ◆ 'Company Contact (int 1)' means that a 1 in the field will assume the Customer is the Primary Contact for the Company, if the field is left empty or completed with a zero, it is assumed the Customer is not a Primary Contact.
- ◆ Fields marked as 'Unique' must be unique in the system
- ◆ Locale is the Email Locale for the Customer and will be set to the option applied in the Setup>Email>Setup>Default Locale field if the column is empty
- ◆ Line Manager Username is the Customer's Username as recorded in the system or to be created as part of the .CSV import.

If the Partner option has been enabled in the application Setup, a Partner can be assigned to a Customer by defining the Partner email within the .CSV file.

---

**NOTE:** The Country specified must be the same as what is found within the application

If the spelling is different in the .CSV file, a Customer's Country details will not be imported.

---

1. Click Choose File  
Select a .CSV file to be imported
2. Click Upload

Displayed are lists of fields that are mapped to the corresponding fields in the .CSV file that is to be imported.

The screenshot shows the 'Customer Import' dialog box with the 'Field Mapping Wizard' tab selected. The wizard prompts the user to 'Select the fields you wish to map to the internal database records.' It features two columns of dropdown menus for field selection. The left column includes: First Name (1) First Name (char 64), Last Name (2) Last Name (char 64), Email (3) Email Address (char 128), Company (4) Company (char 128), Department (5) Department (char 128), Company Contact (6) Primary Contact Company (int 1), Department Contact (7) Primary Contact Department (int 1), and Address 1 (8) Address 1 (char 128). The right column includes: Username (18) Username (char 128), Password (19) Password (char 64), Partner's Email (20) Partner's Email Address (char 128), Line Manager Username (28) Line Manager Username (char 128), Notes (26) Notes (CLOB), and Locale (27) Locale (char 5). Below the dropdowns are two checkboxes: 'Ignore First Line' (checked) and 'Web Access' (unchecked). A magic hat icon is visible in the top right corner of the wizard area.

\*Fields marked with a *I* are mandatory.

\*Fields marked with a *I* that do not contain matching system records automatically create new records in system.

1. Adjust mapped fields, if relevant
2. Check Ignore First Line if the imported .CSV file uses its first line as a header to define the field information

Leave the box unchecked if the .CSV file begins with usable data.

3. Check Web Access if the imported Customers are to have immediate access to the Customer Portal

If this option is not selected, Customers will not be able to log into the application until they have been designated web access within the Customer Information>Contact tab.

4. Click Import

The results of the import attempt will be displayed. If the import was successful, the new Customer details can now be accessed in the system.

The screenshot shows the 'Customer Import' dialog box with the 'Import Wizard Results' tab selected. The results area displays the text 'Total of 4 Records Imported Successfully.' and a magic hat icon. A 'Done' button is located at the bottom right of the dialog box.

5. Click Done.

After the Customer has been imported, other fields require manual configuration, including:

- ◆ Room (if relevant)
- ◆ [User Roles](#).

## 2.2.6 Importing Customers using LDAP/Active Directory Server

Administrators can connect the application to a Directory Server for Customer and User authentication purposes. This removes the need to create Customer and User accounts as it allows the system to synchronize accounts and access levels with an existing Directory Server. It has the added benefit of allowing the Administrator to work with existing infrastructure.

As part of the mapping process, if no values exist on the authentication server for a mapped field, no drop-down menu will appear and Users cannot edit the field.

When the authentication server is used, the Customer's password is not visible within the service management tool, regardless of whether the Customer is new or existing in the system. This is due to the Customer's account being validated against an authentication server account rather than an internally authenticated account. The password is stored in the authentication server's database and it is not accessible through the service management system.

Also, Customers using LDAP or Active Directory authentication are not able to edit their first name, last name, LDAP/ADS username or email address. These fields are stored on the authentication server, and cannot be modified within the service management system.

To import Customers using a directory server, see [Authentication](#).

## 2.3 Users

### 2.3.1 Users

The User menu allows an Administrator to create accounts for other Users. The tab gives Administrators and Supervisors control over all User accounts in the system. User accounts can be created, modified and deleted.

Users can have *one* of the following Roles:

- ◆ [Technician](#)
- ◆ [Supervisor](#)
- ◆ [Partner](#);

and one or more of:

- ◆ [Administrator](#)
- ◆ [Customer](#)
- ◆ [Finance](#)
- ◆ [Manager](#).

It is possible for any User to have multiple Roles. (For example, a Technician may also be assigned a Customer Role so they can log requests related to their own equipment. When a User has more than one Role, they can switch between interfaces easily.) See: [Changing Roles](#)

User Accounts can be created within the application or imported from one or more authentication servers.

If using User Custom fields, we recommend these be configured prior to creating Users. See: [Custom Fields](#).

See: [Creating a User Account \(Internal Authentication\)](#)

See: [Importing a User Account \(External Authentication\)](#).

## 2.3.2 Creating a User Account (Internal Authentication)

Users within the system that are to be assigned to support Teams must be allocated one of the following Roles:

- ◆ [Technician](#)
- ◆ [Supervisor](#)
- ◆ [Partner](#).

The above User Roles can work on requests. The About Roles section of the User Guide provides more information regarding specific User Roles in the system.

### Creating a User Account

When creating a new User, the following four tabs are available:

- ◆ Information
- ◆ Schedule
- ◆ Aliases
- ◆ Team
- ◆ Skills
- ◆ Types.

### Information Tab

Within the User Information tab, User details can be created, viewed and edited. User Roles, Process assignment and default logins can all be customized within this tab.

To create a new User:

1. Select User>Users
2. Click New  
The User Information screen appears.
3. \_\_\_\_\_

---

#### User Information Fields

---

|             |   |
|-------------|---|
| Title       | Select a title from the drop-down menu options. (This field is displayed if the Enable Titles option is set to Yes in the Admin>Setup>Setup>Privileges>Customer tab.) |
| First Name* | Enter the User's First Name.  |
| Last Name*  | Enter the User's Last Name.   |
| User Name*  | Enter a LiveTime User Name (unique).  |

---

---

## User Information Fields

---

|                      |   |
|----------------------|---|
| Password*            | Enter a User Password. Note: Passwords can be changed under the Users Tab or reset by the User under their My Account tab.  |
| Roles*               | <p>Assign a Role for the User. Each Role has associated permissions. See <a href="#">Roles</a>.</p> <p>Every Technician Role assigned also needs a Supervisor assigned.</p> <p><b>NOTE:</b> Note: More than one Role can be assigned but only one of Supervisor, Partner or Technician can be allocated per User.</p>   |
| Default Portal*      | <p>The Default Portal is the User Interface accessed by default when a User with multiple Roles logs into the system.</p> <p><b>NOTE:</b> If the Users Default Portal is set to Customer, the User details will not be accessible in the Users list, but included in the list within the User&gt;Customer tab.</p>  |
| Assignment Template  | <p>This option is visible in a new User Information screen if Job Assignment Templates are configured in the User&gt; Assignments tab.</p> <p>Select a template to assign the new User to multiple Teams, Escalation layers and Processes.</p>  |
| Operations Processes | <p>Assign the licensed access for Request Fulfilment, Incident and Problem Management.</p> <p>Assigning Processes to the User gives them access to support those Processes and enables them to be assigned as Team members for those Processes' Teams.</p> <p>See <a href="#">User Processes</a>.</p>   |
| Change Processes     | <p>Assign the licensed access for Change, Release and Deployment Management. Note, Users assigned Release are automatically assigned Deployment.</p>  |
| Internal Processes   | <p>Enable the Users privilege to maintain Service Level, Configuration and Knowledge Management.</p> <p>Selecting the Configuration and Knowledge options displays the relevant fields that enable granular controls to be set for those processes.</p> <p><b>NOTE:</b> The Finance Role is limited to the processes of Configuration and Service Level Management.</p> |
| Knowledge            | <p>If the User is assigned the Knowledge Management process, their privilege to create, edit, delete and/or publish KBAs can be configured.</p>   |

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## User Information Fields

---

|                   |   |
|-------------------|---|
| Configuration     | If the User is assigned the Configuration Management process, their privilege to create, edit and/or delete Items within the CMDB can be configured on a per task basis.  |
| Customer Org Unit | If the User is also allocated a Customer Role within the system, this field is displayed. Enter Company or Department details that apply to the User in their Customer Role.  |
| Line Manager      | <p>(This field is visible if the User is also assign a Customer Role within the system. The information can not be edited if the line manager details are set by the LDAP synch.)</p> <p>If relevant, assign a system user with the Customer Role who can approve/reject requests made by this Customer.</p>  |
| Primary Email*    | Enter the User's email address. System messages are sent to this address.   |
| Send To           | <p>This field becomes available for Users that have the Customer Role and have alternate email addresses entered on the Aliases tab.</p> <p>Select the most appropriate email address to be set as the default address applied to Customer correspondence. When the Send To field is set to an alias address the Primary Email address is not included in the cc list, unless specified in the request Information tab cc list.</p>   |
| Phone             | Enter telephone details.  |
| Mobile            | <p>A mobile number can be entered as a contact number or for use with SMS (Short Mail Service message). An SMS can be sent to notify the assigned Technician when a Service Request is raised.</p> <p>SMS Messaging options:</p> <ul style="list-style-type: none"><li>◆ From the drop down list, select the SMS service provider.</li><li>◆ Override SMS Address. If your service provider does not appear in the list, click this checkbox and enter an alternate Service Provider.</li></ul> |
| SMS Override      | Enter SMS Gateway override details for the User, if a number other than the one entered in the Mobile field is to be used to send/receive updates via SMS. Enter the complete SMS details in email address format, i.e.,<br>000777891@smsgateway.provider.com.  |
| Fax               | Enter known fax details.  |
| Pager             | Enter pager details.  |

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---

## User Information Fields

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|                 |  |
|-----------------|--|
| Salary          | An annual salary can be entered. This value is used for reporting.   |
| Forum Moderator | Select this checkbox to designate this User as a forum moderator. See Forums.  |
| Survey Manager  | Select this checkbox to enable this User to create and manage surveys in the system.   |
| Supervisor*     | Select a Supervisor, if the User has a technician role. Users with the Technician Role must be allocated a Supervisor.   |
| Partner For     | When a User is assigned the Partner Role, their associated Partner Organization must be assigned within this field.  |
| Partner         | If the User is also assigned a Customer Role, this field allows the Customer to be associated with a Partner Organization who will handle their requests when they are logged in the system.   |
| Available       | Shows if the User is available for requests to be assigned to them. This is based on work hours configured in the Schedule tab of the User and their Vacation Status. If no hours are set within the Schedule tab when the "Define Works Hours" is enabled within Admin>Setup>Privileges>User screen and the User is not on vacation, the system will consider them to be unavailable. |
| Assignment      | **Visible when the Assignment Control is enabled in Admin>Setup>Privileges>User.<br><br>Set to Off if the User is not to be assigned new requests, irrespective of their Availability status.  |
| On Vacation     | Placing a Technician on vacation excludes them from being assigned new requests automatically. When On Vacation is activated a Technician's existing requests are not reassigned.  |
| Training        | This option is only visible for Technician Users, and when enabled allows the User to be included in Teams to view requests but does not allow them to put the request in edit mode or add Notes.  |
| Email Locale    | Adjust the default language for email correspondence, if required.   |
| Country         | The User automatically adopts the default Country set for the system. However, the Country can be manually adjusted here for the specific User.  |
| State           | Set the State information based on the Country selected, if required.  |
| Timezone        | The User automatically adopts the default Timezone set for the system. However, the Timezone can be manually adjusted for the specific User.   |

---

---

## User Information Fields

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GPS

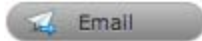
The GPS coordinates of the last known address.

---

\* Denotes Mandatory Fields

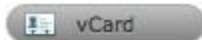
1. Complete the User detail information
2. Click Done.

## Emailing User Details



To email a User regarding their system log in credentials, click the Email button within the User Information screen. If Random Passwords is enabled, selecting Email will reset the Password and forward the details to the User. If Password Questions is enabled in Setup>Privileges>System, selecting Email will send a link to the User directing them to a page that includes the security questions set for their account and reset the password based on the answers provided. Customers must complete this process within an hour of the email being sent.

## vCard Button



Select this option to download and open the User's information in an electronic business card format, to email or save outside the system.

## Schedule Tab

By default the Schedule tab includes the On Vacation option, which can be set to Yes when the User takes leave. The system will automatically reassign the User's active requests, if the Vacation Reassign option has been enabled in the Admin>Setup>Privileges>User tab. If this option has not been enabled, a Supervisor User will need to manually reassign the requests, if required.

If the system Setup has been configured to Define Work Hours and Schedule Vacations, this additional functionality is available within the Schedule tab.



**User Information**

Information | **Schedule** | Aliases | Team | Skills | Org Unit

**Calvin Johns**

**Working Hours**

Relative To (GMT +10:00) Melbourne, Sydney, Canberra, Port Moresby

Apply Template

|           |               |    |               |
|-----------|---------------|----|---------------|
| Sunday    | <unavailable> | to | <unavailable> |
| Monday    | 09:00         | to | 17:00         |
| Tuesday   | 09:00         | to | 17:00         |
| Wednesday | 09:00         | to | 17:00         |
| Thursday  | 09:00         | to | 17:00         |
| Friday    | 09:00         | to | 17:00         |
| Saturday  | <unavailable> | to | <unavailable> |

**Holidays**

On Vacation  No  Yes

Schedule

| <input type="checkbox"/> Purpose | <input type="checkbox"/> Start Date | <input type="checkbox"/> End Date | <input type="checkbox"/> Active |
|----------------------------------|-------------------------------------|-----------------------------------|---------------------------------|
| 0 - 0 of 0 Results               |                                     |                                   |                                 |

## Define Work Hours

Use the drop-down lists to set the hours of work when the User is available for the week. Based on what is set here, the system will assign requests to the User during their available hours. However, if no other Technician is available for requests based on their defined work hours, the system will assign the User new requests outside of their set work hours.

---

**NOTE:** If the Technician Define Work Hours option has been enabled, the hours of work **MUST** be defined, otherwise the system will ignore the Technician Assignment logic and automatically allocate new requests to the Team Lead.


---

## Schedule Holidays

The Schedule Holidays functionality allows the Supervisor to pre-book leave in the system for Users. There are no restrictions on the number of days that can be set, and based on the configuration, when a leave period is activated, the system will automatically reassign active requests to other available Users applying the Technician Assignment logic. If the request was initially drawn from an Incident Queue, it will not return to the Queue but be reassigned to the most relevant Technician based on the Technician Assignment logic.


As a Supervisor User, to schedule User leave:


1. Go to the Users>User option
2. Select the hyperlink name of the User
3. Move to the Schedule tab

4. Click Edit
5. Select 
  - The Vacation Details window is expanded.
6. Enter the reason for leave in the Purpose box

**Vacation Details**

Purpose

Start Date  

End Date  

7. Complete the Start and End date details
8. Click Save

The details are recorded in the database and when the Start Date is reached, new requests will not be assigned to the User. After the scheduled End Date, the User account will be automatically re-activated.

**Holidays**

On Vacation  No  Yes

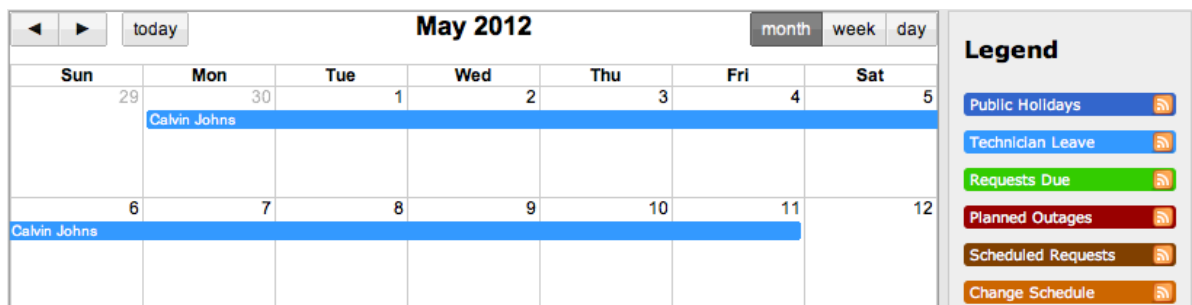
Schedule  

| Purpose                               | Start Date     | End Date       | Active |
|---------------------------------------|----------------|----------------|--------|
| <input type="checkbox"/> Annual Leave | 04/30/12 12:00 | 05/11/12 11:59 |        |

1 - 1 of 1 Results

9. **NOTE:** It should be noted that if the User on vacation is a Team Lead for any Teams where there are no Technicians available for new request assignment, the system will allocate new requests to the Team Lead, regardless of their vacation status.

The Supervisor Events calendar in the Home Tab shows when Users on vacation:



## Aliases Tab

**NOTE:** This is only applicable if the User has the Customer Role.

Use the Aliases tab to enter additional email addresses. Email addresses in the Aliases tab allow the User to send emails to the System or Team support addresses from more than one address. The system creates requests from these emails. Notifications for requests created using an address in the Aliases tab, are sent to the main email address and cc'd to the alias address that was used to create the request.

When one or more alias email addresses have been created for a Customer, a Send To field is displayed on the Customer Information screen, which allows the most appropriate email address to be set as the default address applied to Customer correspondence. When the Send To field is set to an alias address the Primary Email address is not included in the cc list, unless specified in the request Information tab cc list.



To add an alias email address:

1. Select User>Users
2. Click on the User name  
The User Information screen appears.
3. In the Information tab, click Edit
4. Select the Aliases tab
5. Enter an alias email address
6. Click Save.

When an alias email address has been created for a Customer, a Send To field is displayed on the Customer Information screen, which allows the alias email address to be set as the default address applied to Customer correspondence.

- 
7. **NOTE:** An alias will only be used if the User has a Customer Role.
- 

## Team Tab

The User Team tab lists Teams associated with the selected User. Use this section to assign the User to one or more support Teams, making the additions by Team or job Assignment templates that have been configured in the system. Processes selected in the Information Tab for the User determine the Teams available in the Team tab.

Once a User is assigned to the Team, the Supervisor must configure the escalation layers for the Team to include the new User. However, the User can easily be added to Layer One of escalation when associated with a new Team by ticking the "Assign new users to layer one option" when assigning the Team within this tab. Also, if Assignment templates are created in the system, by selecting the Team template, the User will automatically be added to Teams, Escalation Layers and Work Groups configured within the selected template.

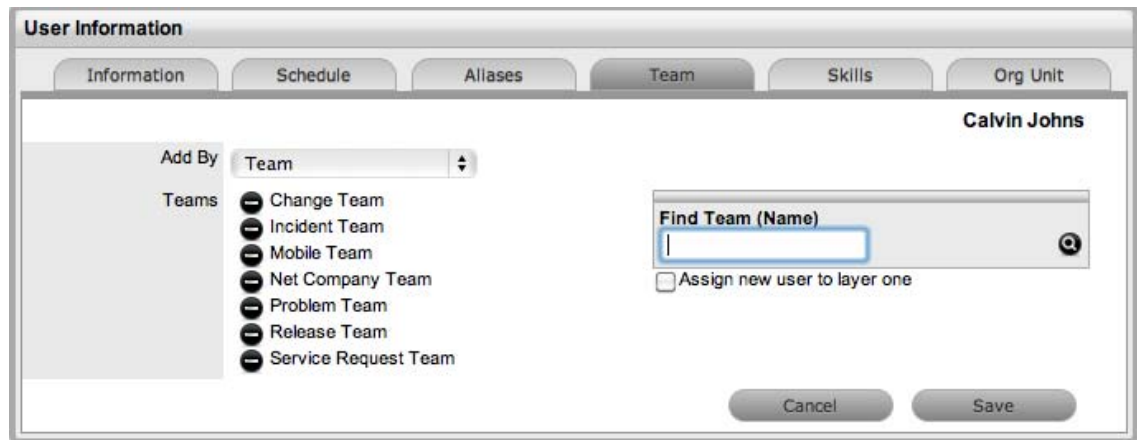
---



**NOTE:** The User must be assigned the relevant Processes for Support Teams to be shown in Team search results. If an Assignment template is selected and includes Teams for Processes the current User is not allocated, those Teams will not be included on the template.

---

To add a User to a Team within the Team tab:

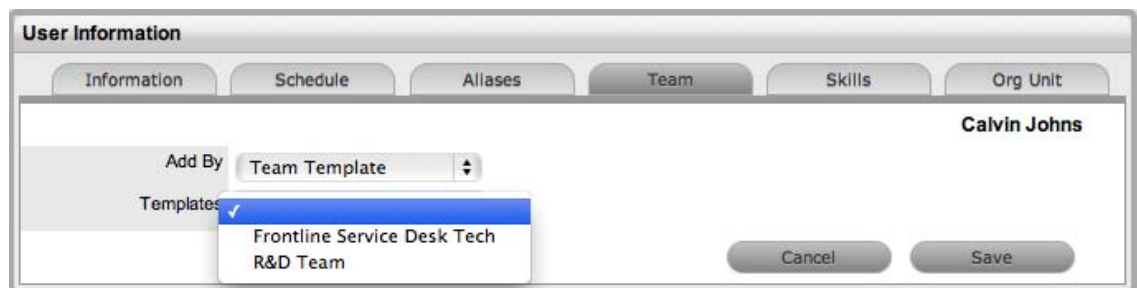
1. Click Edit



2. Using Add By Team, enter a Team Name in the Find Team field and click 
- Or, leave the field empty and click . The Teams for Processes that the User is assigned are displayed in the search results.
3. Tick "Assign new user to layer one", if relevant
4. Select a Support Team link  
The User is assigned to the Team and layer one of escalation if appropriate.
5. Click Save.

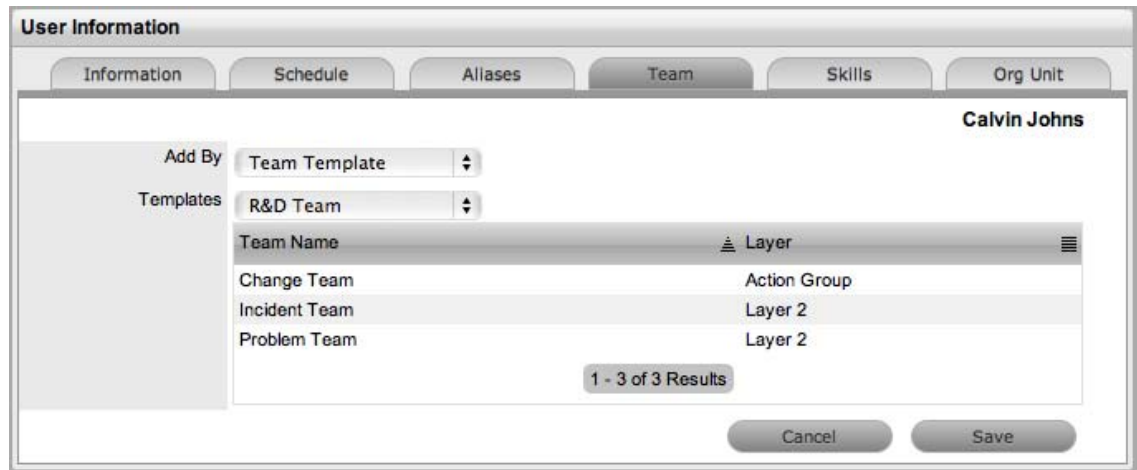
To add a User to a Team within the Team tab using Assignment templates:

1. Click Edit
2. Within the Add By field, select Team Template  
Job Assignment Templates that have been configured in the User>Assignments tab are displayed, but only including Teams consistent with the Processes assigned to the User.



3. Select one or more Template options
4. Click Save.


The User is automatically included in the Teams, Escalation Layers and Work Groups configured in the Template.



To remove a User from a Team:

1. Select User>Users

The User Information screen appears.

2. Click on the name of the User
3. Select the Team Tab
4. Click Edit
5. Select  to remove a Team assignment
6. Click Save
7. Click Done.

8. **NOTE:** If a User is the Team Lead or the only person assigned to an escalation layer they cannot be removed from a Team under this tab.

## Skills Tab

Use this section to assign any specific Classifications that are to be handled by a Supervisor, Technician or Partner. This assignment assumes areas of expertise for Users assigned to these Classifications. This allows the system to automatically route requests logged against these Classifications to the most appropriate User.

**NOTE:** Prior to using the Skills tab, the Supervisor should configure Items and Classifications.

## Assigning a Classification

To assign a Classification:

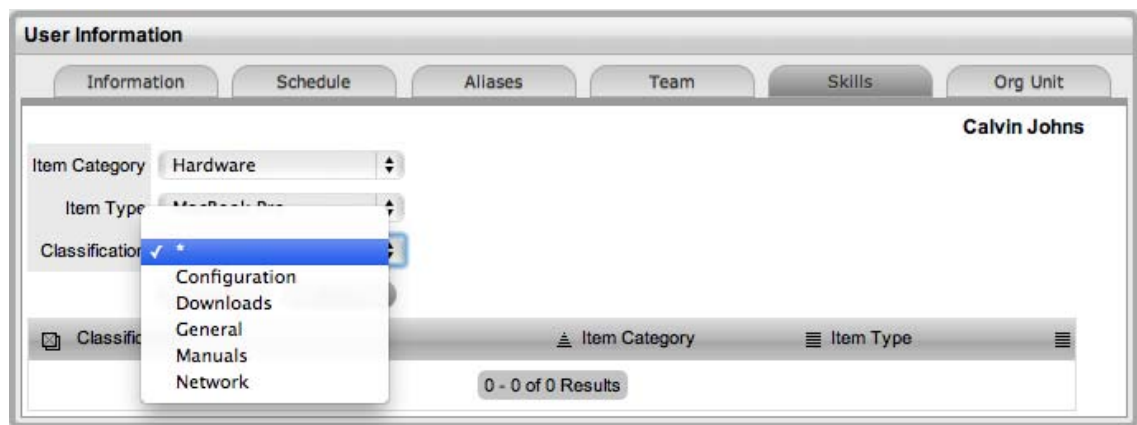
1. Select User>Users>Skills
2. Click Edit to display the Add button
3. Click Add
4. Select the Item Category

The Item Type and Classification Type drop-down list is displayed.



5. Choose an Item Type, if relevant
6. Select \* to assign all Classifications as Skills or choose a specific Classification

The list displayed will include all Classifications configured for the Item Category and the Item Type, if an Item Type is selected.



7. Click Save
8. Click Done.

---

**NOTE:** The Classification assigned to the User is either based on the Classifications of an Item Category or Item Type, hence displaying two columns. However, the Item Type column will only include information when the Classification selected is specific to that Item Type, and not directly related to the Item Category.

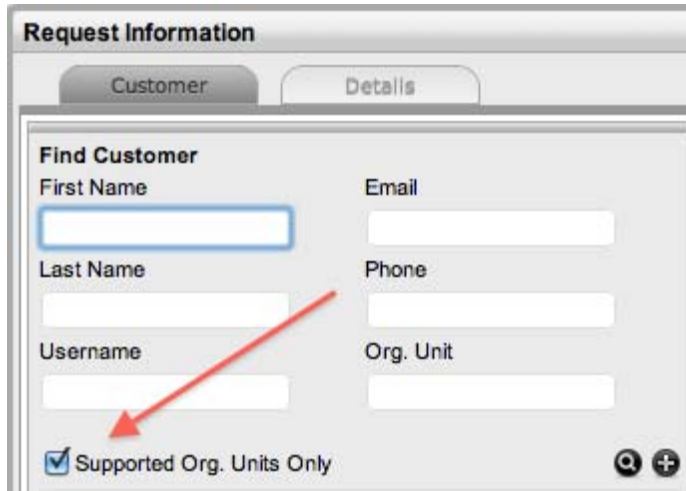
---

To remove a Classification:

1. Select User>Users  
The User Information screen appears.
2. Click on the name of the User
3. In the Skills tab, click Edit  
The Delete button appears at the bottom right.
4. Click the checkbox next to the Classification. Multiple Classifications can be checked
5. Click Remove
6. Click Done.

## Org Unit Tab

Use this section to assign one or more Org Units to a Supervisor, Technician or Partner, which will result in requests that are logged by these Org Units being routed to the assigned Users. When Users are assigned to support Organizational Units, the Find Customer option during the request creation process displays the "Supported Org. Units Only" option. This limits the Customer search results to those Customers who belong to the Org. Units the logged in Technician is assigned to support.

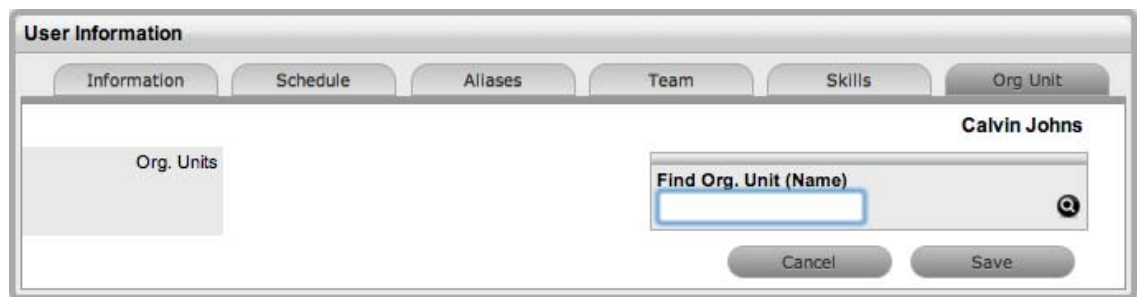


The screenshot shows the 'Request Information' dialog box with the 'Find Customer' section. The 'Supported Org. Units Only' checkbox is checked and highlighted with a red arrow. The search fields include First Name, Last Name, Username, Email, Phone, and Org. Unit.


## Assigning an Org Unit

To assign an Org Unit:

1. Select User>Users>Org Units
2. Click Edit to display the Find Org. Unit search field
3. Enter any known Org. Unit details or leave the field blank to return the full list of Org. Units recorded in the system




The screenshot shows the 'User Information' dialog box with the 'Org Unit' tab selected. The 'Find Org. Unit (Name)' search field is visible, along with 'Cancel' and 'Save' buttons. The user name 'Calvin Johns' is displayed at the top right.

4. Click 
5. Click on the Org. Unit name hyperlink to associate it with the User  
Multiple selections may be made, if required.
6. Click Save.

## Removing an Org Unit

To remove the association between a User and an Org Unit:

1. Select User>Users  
The User Information screen appears.
2. Click on the name of the User
3. In the Org Units tab, click Edit
4. Select  next to the relevant Org Unit/s  
The Org Unit/s details are removed from the tab
5. Click Save
6. Click Done.

## Re-enabling Deleted Accounts

Administrators have the ability to reactivate deleted User accounts.

To enable a deleted account:

1. Within the User>Users tab, select the Search button
2. Select Deleted as the Account Status search option
3. Click Search  
A list of deleted Users is displayed.
4. Select a User to re-enable  
The User information page appears.
5. Click the Enable button, to reactivate the account.  
The User account becomes active and is available within the application.

### 2.3.3 Importing Users using LDAP/Active Directory Server (External Authentication)

Administrators can connect the system to a Directory Server for User authentication purposes. This removes the need to create User accounts as it allows the application to synchronize User accounts and access levels with an existing Directory Server. It has the added benefit of allowing the Administrator to work with existing infrastructure.

As part of the mapping process, if no values exist on the authentication server for a mapped field, no drop-down menu will appear and Users cannot edit the field.

When the authentication server is used, the User's password is not visible through the service management application, regardless of whether the User is new or existing in the system. This is due to the User's account being validated against an authentication server account rather than a system account. The password is stored in the authentication server's database and it is not accessible through the application.

Also, Users using LDAP or Active Directory authentication are not able to edit their first name, last name, LDAP/ADS username or email address. These fields are stored on the authentication server and cannot be modified within the service management tool.

To import Users using a directory server, see [Authentication](#).



## 2.4 Assignments

The Assignments tab allows job function templates to be created for new and existing Technician Users. Users can be assigned to multiple Teams, Escalation Layers and, for new Users, Processes by applying the templates. Administrator and Supervisor Users can apply these templates within the User Information screen for new Users, and the Team tab of the User Information screen for existing Users who are assigned the relevant Processes.

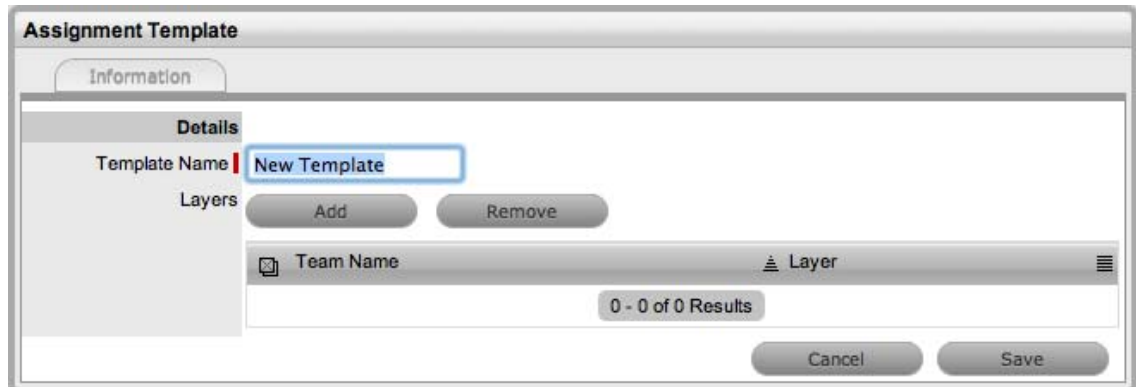
For example, a Frontline Support template may be created, where a User is assigned to Layer 1 of an Incident Team and a Work Group of a Service Request Team. They may also be assigned to an Update Customer Group within a Change Management Team. This template could then be easily applied to all Users created directly in the system, within the User Information screen. Or, if the User was created using an authentication server, the template could be applied within the Team tab of the User Information screen.

### 2.4.1 Creating an Assignment Template

Before creating an Assignment template, be sure all the relevant Teams and Escalation Layers or Groups exist in the system. However, should you create additional Teams, Escalation Layers or Groups at a later date, the Assignment template can easily be updated.

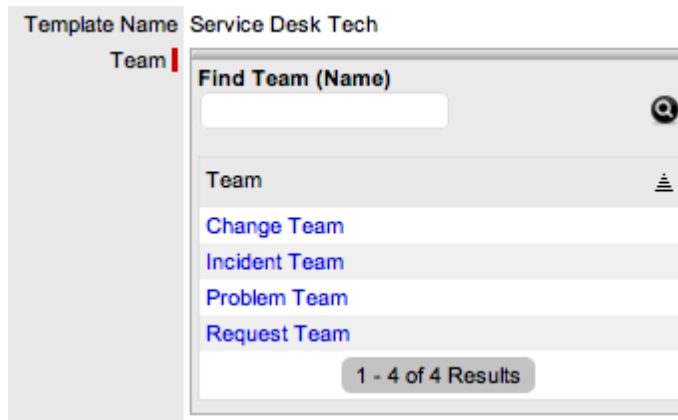
To create an Assignment Template:

1. Select User>Assignments
2. Click New

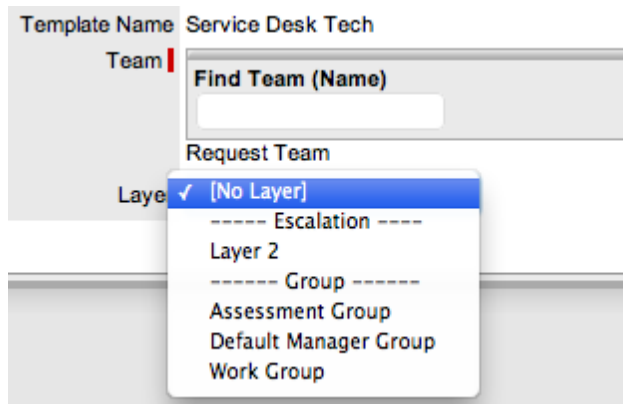


The screenshot shows the 'Assignment Template' dialog box. It has a title bar 'Assignment Template' and a tab 'Information'. Under the 'Details' section, there is a 'Template Name' field containing 'New Template'. Below this, there is a 'Layers' section with 'Add' and 'Remove' buttons. At the bottom, there is a search field for 'Team Name' with a 'Layer' dropdown and a '0 - 0 of 0 Results' indicator. 'Cancel' and 'Save' buttons are at the bottom right.

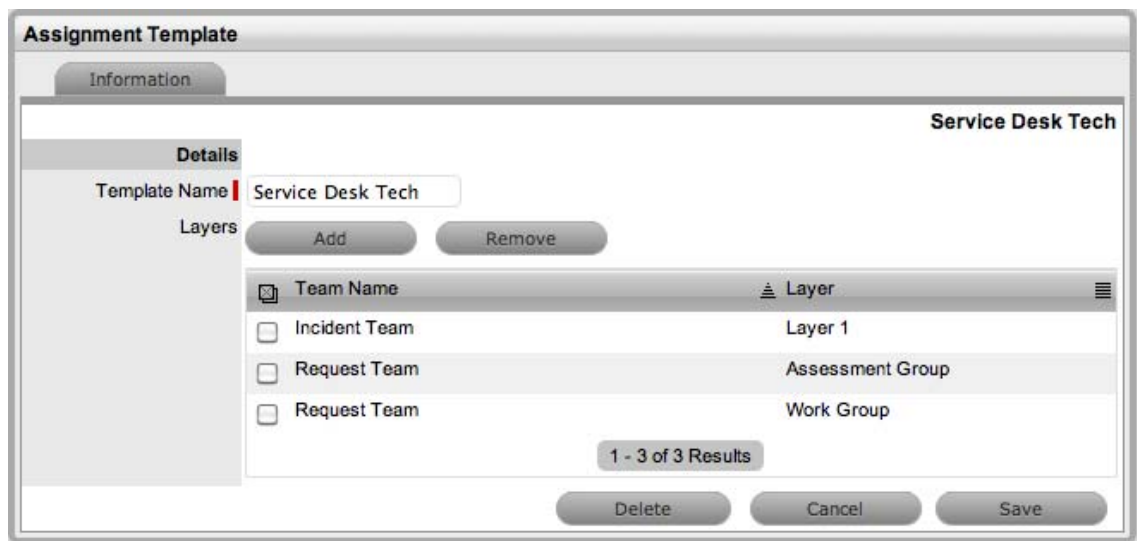
3. Enter the Template Name
4. Click Add  
The Find Team editor is displayed.
5. Enter a Name to find a specific Team, or leave the field blank to return a list of all Teams and click 🔍



6. Select the Team name link  
The Layer or Groups drop down list is displayed.
7. Select an option from the available list



8. Click Save
9. Repeat steps 4 to 8, until all relevant assignments have been created for the template



10. Click Save.

The template is now available within the User Information screen for new User creation, or the Teams tab for existing Users.

## 2.4.2 Editing an Assignment Template

To make changes to an existing User Assignment template, such as adding or removing Teams and the related Layer or Group assignment:

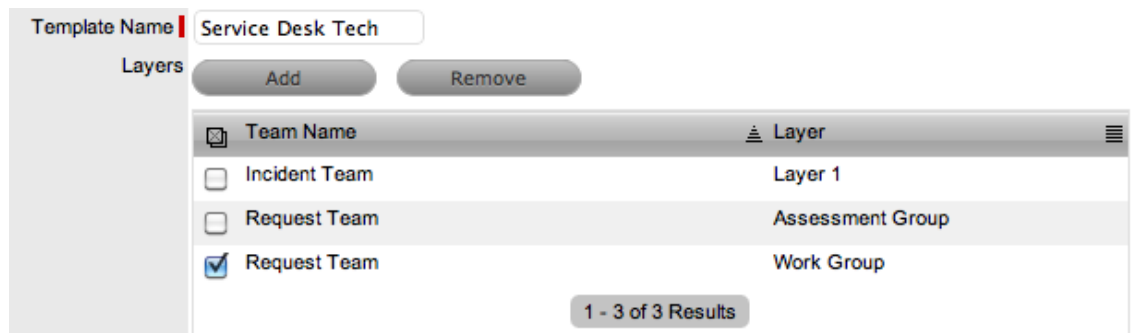
1. Select User>Assignments



| Template Name                     | Owner             | Teams | Layers |
|-----------------------------------|-------------------|-------|--------|
| <a href="#">Developer</a>         | Simone Supervisor | 3     | 3      |
| <a href="#">Service Desk Tech</a> | Simone Supervisor | 2     | 3      |

1 - 2 of 2 Results

2. Click on the relevant Template Name hyperlink
3. Click Edit
4. To remove a Team/Layer association, check the box next to the Team Name



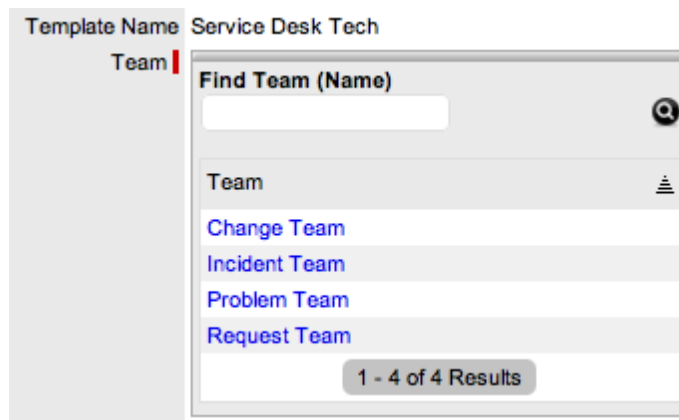
Template Name:

Layers:

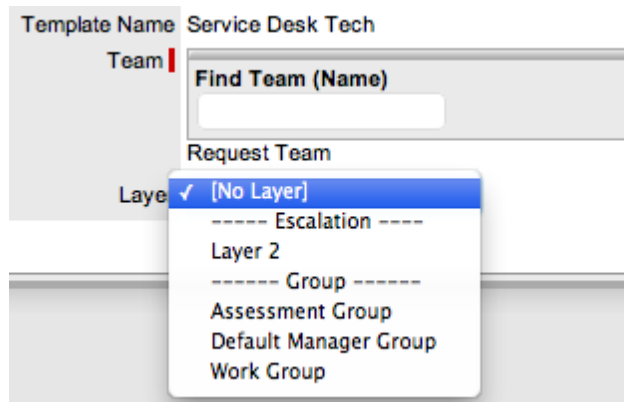
| Team Name  | Layer            |
|--|------------------|
| <input type="checkbox"/> Incident Team           | Layer 1          |
| <input type="checkbox"/> Request Team            | Assessment Group |
| <input checked="" type="checkbox"/> Request Team | Work Group       |

1 - 3 of 3 Results

5. Click Remove
6. To add a Team/Layer association, click Add
7. Enter a Name to find a specific Team, or leave the field blank to return a list of all Teams and click 🔍



8. Select the Team name link  
The Layer or Groups drop down list is displayed.
9. Select an option from the available list



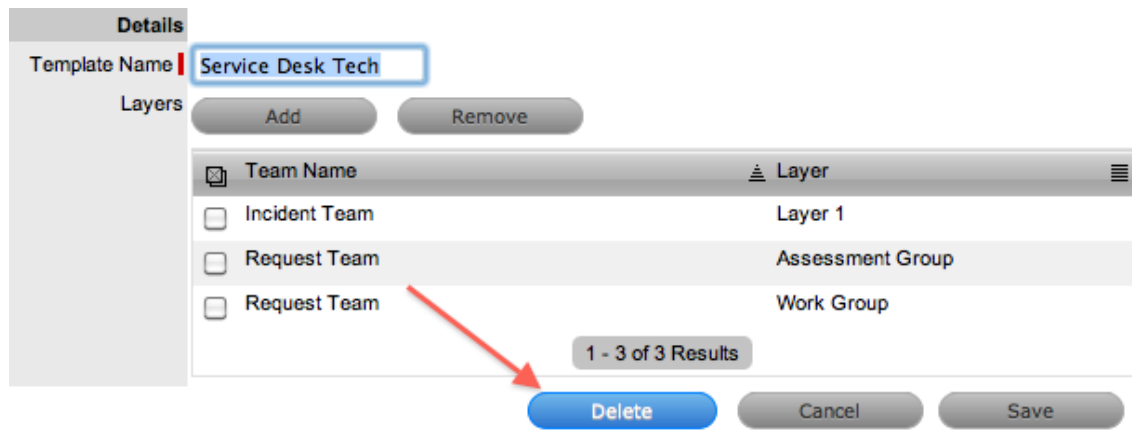
10. Click Save
11. To save all changes, click Save.  
The screen defaults to the Assignments list view.

### 2.4.3 Deleting an Assignment Template

To delete an Assignment template from the system:

1. Select User>Assignments
2. Click on the relevant Template Name hyperlink
3. Click Edit
4. Select Delete

A warning message is displayed.



5. Click OK.

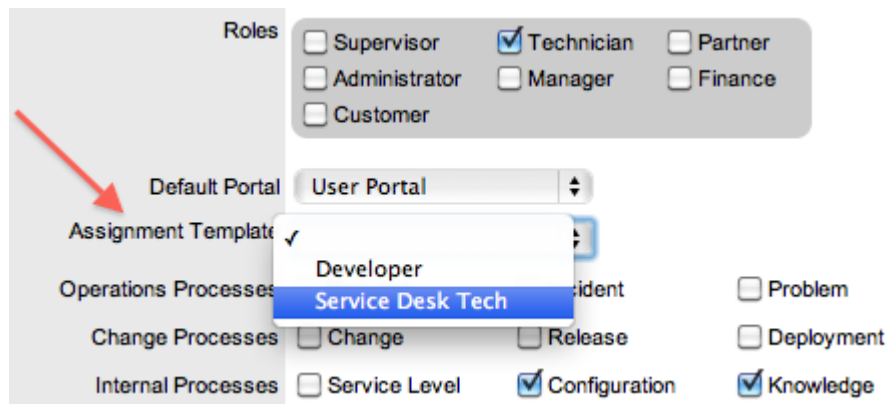
The screen defaults to the Assignments list view.

## 2.4.4 Applying Assignment Templates to New Users

For new Users created directly in the system, the Assignment template is available within the User Information screen. By selecting a template, the newly created User is automatically associated with all relevant Processes, Teams, Escalation Layers and Groups. To remove a Team assignment after a template has been applied during the new User creation, deselect the Process and the Team Name will be removed from the assigned list.

To use an Assignment template for a new User:

1. Select the User>Users tab
2. Click New
3. Enter the User details
4. Within the Assignment Template field, select the relevant option  
All Processes are automatically ticked for the User.



5. Uncheck any Processes that are to be removed for the User

The Team association will automatically be removed from the Team Name list.

6. Complete remaining User details, including assigning a Supervisor and Email address
7. Click Save.

## 2.4.5 Applying Assignment Templates to Existing Users

For Users who have active accounts in the system and are assigned the relevant Processes, the Assignment template is available within the Team tab of the User Information screen.

To apply a template to an existing User:

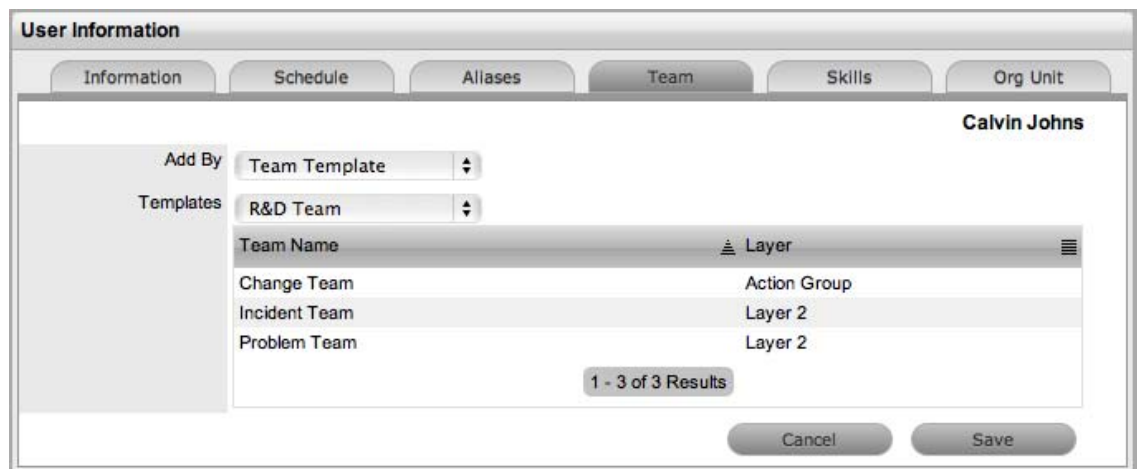
1. Go to User>Users
2. Select the Technician Name hyperlink
3. Click Edit
4. Verify the User has all the relevant Processes with the User Information screen
5. Select the Team tab
6. Within the Add By field, select the Team Template option

The drop down list of Templates is made available.



The screenshot shows the 'User Information' window for 'Calvin Johns'. The 'Team' tab is active. The 'Add By' dropdown menu is set to 'Team Template'. The 'Templates' dropdown menu is open, displaying a list of options: 'Frontline Service Desk Tech' and 'R&D Team'. The 'R&D Team' option is currently selected and highlighted in blue. 'Cancel' and 'Save' buttons are visible at the bottom right.

7. Select the relevant Template from the list
8. Click Save.



The screenshot shows the 'User Information' window for 'Calvin Johns'. The 'Team' tab is active. The 'Add By' dropdown menu is set to 'Team Template'. The 'Templates' dropdown menu is open, displaying a list of teams: 'Change Team', 'Incident Team', and 'Problem Team'. The 'Change Team' option is currently selected and highlighted in blue. Below the list, it says '1 - 3 of 3 Results'. 'Cancel' and 'Save' buttons are visible at the bottom right.

| Team Name     | Layer        |
|---------------|--------------|
| Change Team   | Action Group |
| Incident Team | Layer 2      |
| Problem Team  | Layer 2      |

## 2.5 About Roles

### 2.5.1 User Roles

There are seven access levels in the system that determine the functionality and privileges. These include the Administrator and Customer Roles, plus five User Roles:

- ◆ Supervisor
- ◆ Technician
- ◆ Partner
- ◆ Manager
- ◆ Finance.

A Default Role is assigned if multiple Roles are allocated to an individual.

A User can have more than one Role but only one of the licensed Roles of:

- ◆ Supervisor
- ◆ Partner
- ◆ Technician.

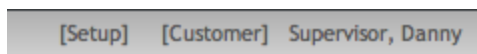
#### Default Portal

Individuals can be allocated more than one Role. For Users assigned more than one Role, define a Default Portal within their Information screen. When they log into the system, the Default Portal is displayed and they can move to other Portals using the links provided next to their login name.

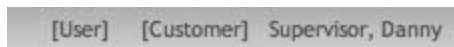
The Default Portal options include Customer, Setup for system Administrators and User, for those assigned a Supervisor/Technician/Partner, Finance and Manager Role(s).

When a person has multiple Roles, the Default Role is used to log into the system and the privileges of multiple User Roles are consolidated in one view. For example, if a User is assigned Finance, Manager and Supervisor/Technician access, they can view all functionality related to these Roles within the User view.

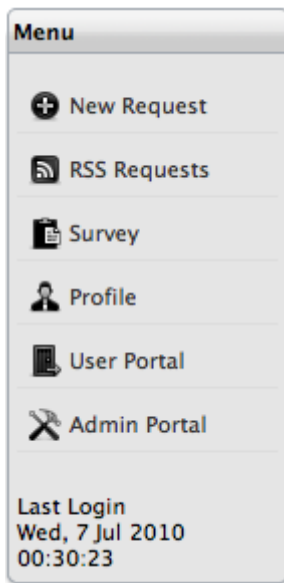
When the User is also assigned Admin and Customer access, next to their login name, the options of Setup and Customer will be displayed.



The Administrator can access the admin functionality within the Setup view. If the Administrator is also assigned User and Customer access, next to their login name, the options of Setup and Customer will be displayed.



Users or Administrators who are also assigned Customer access can view the Customer Portal through the Customer link displayed in the sub-menu bar. Whilst logged in as the Customer, the options of User and Admin Portal will be displayed within the Customer Portal sidebar Menu.



To move to another User Role portal:

1. Log in using the credentials for the default User Role
2. Click on the Setup/User/Customer link, as required.

The screen defaults to the selected functionality.

## 2.5.2 User Processes

The service management application includes processes to manage the different types of requests:

- ♦ Service Requests
- ♦ Incidents
- ♦ Problems
- ♦ Change Requests
- ♦ Release and Deployment
- ♦ Service Level Management.

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**NOTE:** Service Requests, Problem, Change, Release and Deployment Management apply based on installed license.

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When User accounts are created, access to Incident, Problem, Change, Release, Deployment, Request, Service Level, Configuration and Knowledge Management processes are allocated to the Roles. Allocating processes gives the User access to requests and information within each assigned process.

Providing access to the licensed processes of Incident, Problem, Change and Service Requests means the User can be assigned as a member of support Teams within that process.

Setting access to the support process of Service Level Management displays the Service Tab for the User when they log into the application. This allows the User to create and edit SLAs, OLAs and Underpinning Contracts.

When the privileges of Configuration and Knowledge are selected, the options to define control at a more granular level are displayed in the User Information screen, and Users can be assigned permission to create, edit, delete and publish elements within these processes.



The following User Roles have limitations for the processes they are assigned:

- ♦ The Finance Role can only be assigned Configuration and Service Level Management
- ♦ The Management Role can be allocated all processes but with 'Read Only' access.

## 2.5.3 User Roles & Privileges

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### Service Manager 7.0 User Roles and Privileges

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| Modules & Features                       | Administrator | Supervisor | Technician | Partner | Finance | Manager | Customer |
|--|---------------|------------|------------|---------|---------|---------|----------|
| Setup                                    |               |            |            |         |         |         |          |
| Email Setup and email customization      | Yes           |            |            |         |         |         |          |
| Create Custom Fields                     | Yes           |            |            |         |         |         |          |
| Set User, Customer & System Privileges   | Yes           |            |            |         |         |         |          |
| UI customization                         | Yes           |            |            |         |         |         |          |
| Dynamic database switching               | Yes           |            |            |         |         |         |          |
| Schedule LDAP/ ADS Integration           | Yes           |            |            |         |         |         |          |
| Item import via AMIE or .CSV file        | Yes           |            |            |         |         |         |          |
| Customer Import                          | Yes           |            |            |         |         |         |          |
| Scheduled Reports                        | Yes           |            |            |         |         |         |          |
| Incident Analyzer for Problem Management | Yes           |            |            |         |         |         |          |
| Enable Billing module                    | Yes           |            |            |         |         |         |          |
| Customize Workflows                      |               | Yes        |            |         |         |         |          |
| Customize System Messages and Keywords   | Yes           |            |            |         |         |         |          |
| Chat                                     |               | Yes        | Yes        | Yes     |         |         | Yes      |

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**Service Manager  
7.0 User Roles  
and Privileges**

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|  |     |     |       |       |       |       |     |
|--|-----|-----|-------|-------|-------|-------|-----|
| Context Sensitive Help                       | Yes | Yes | Yes   | Yes   | Yes   | Yes   | Yes |
| Create Users                                 | Yes | Yes |       |       |       |       |     |
| Assign User Roles & Processes                | Yes | Yes |       |       |       |       |     |
| Create Teams, Escalation layers & Workgroups |     | Yes |       |       |       |       |     |
| Create Customers                             | Yes | Yes | Setup | Setup | Setup | Setup |     |
| Enable Customer access                       | Yes | Yes | Yes   | Yes   | Yes   | Yes   |     |
| View/ Edit Customer                          | Yes | Yes | Yes   | Yes   | Yes   | Yes   |     |
| Search Customers                             | Yes | Yes | Yes   | Yes   | Yes   | Yes   |     |
| Re-enable deleted Users & Customers          | Yes |     |       |       |       |       |     |
| Create Organizational Units                  |     | Yes | Yes   | Yes   | Yes   | Yes   |     |
| Assign Contracts to Cust Org. Units          | Yes | Yes | Yes   | Yes   | Yes   | Yes   |     |
| Incident Management                          |     |     |       |       |       |       |     |
| Create/Edit Incidents                        |     | Yes | Yes   | Yes   |       |       |     |
| Delete Incidents                             |     | Yes |       |       |       |       |     |
| View/ Edit other Technicians' Incidents      |     | Yes | Setup |       |       |       |     |
| Re-assign Incidents                          |     | Yes | Setup | Setup |       |       |     |
| Escalate Incidents                           |     | Yes | Setup | Setup |       |       |     |
| View all Incidents                           |     | Yes | Setup |       |       |       |     |
| Handshaking                                  |     | Yes | Yes   | Yes   |       |       |     |
| Incident Groups                              |     | Yes | Yes   | Yes   |       | Yes   |     |

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**Service Manager  
7.0 User Roles  
and Privileges**

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|  |     |       |       |     |     |
|--|-----|-------|-------|-----|-----|
| Impact analysis                                | Yes | Yes   | Yes   | Yes |     |
| View Proposed Solutions                        | Yes | Yes   | Yes   |     |     |
| Incident analysis                              | Yes | Yes   | Yes   |     |     |
| Subscribe to RSS feeds                         | Yes | Yes   | Yes   |     |     |
| Request Fulfilment                             |     |       |       |     |     |
| Create/Edit Service Requests                   | Yes | Yes   | Yes   |     |     |
| Delete Service Requests                        | Yes |       |       |     |     |
| View/ Edit other Technicians' Service Requests | Yes | Setup | Setup |     |     |
| View all & re-assign Service Request           | Yes | Setup | Setup |     |     |
| Approve Service Request                        |     |       |       | Yes | Yes |
| Escalate Service Request status                | Yes | Yes   | Yes   | Yes |     |
| Handshaking                                    | Yes | Yes   | Yes   |     |     |
| View Proposed Solutions                        | Yes | Yes   | Yes   |     |     |
| Service Request Groups                         | Yes | Yes   | Yes   | Yes |     |
| Impact analysis                                | Yes | Yes   | Yes   | Yes |     |
| Update Workflow State                          | Yes | Yes   | Yes   |     |     |
| Problem Management                             |     |       |       |     |     |
| Create/Edit Problems                           | Yes | Yes   | Yes   |     |     |
| Delete Problems                                | Yes |       |       |     |     |
| View/ Edit other Technicians' Problems         | Yes | Setup |       |     |     |
| Re-assign Problems                             | Yes | Setup | Setup |     |     |

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**Service Manager  
7.0 User Roles  
and Privileges**

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|   |     |       |       |     |     |
|---|-----|-------|-------|-----|-----|
| Escalate Problems                             | Yes | Setup | Setup |     |     |
| View all Problems                             | Yes | Setup |       |     |     |
| Create Known Errors                           | Yes | Yes   | Yes   | Yes |     |
| Impact analysis                               | Yes | Yes   | Yes   | Yes |     |
| View Proposed Solutions & Workarounds         | Yes | Yes   | Yes   |     |     |
| Problem analysis                              | Yes | Yes   | Yes   |     |     |
| Create Workarounds                            | Yes | Yes   | Yes   |     |     |
| Change Management                             |     |       |       |     |     |
| Create/Edit Change Requests                   | Yes | Yes   | Yes   |     |     |
| Delete Change Requests                        | Yes |       |       |     |     |
| View/ Edit other Technicians' Change Requests | Yes | Setup | Setup |     |     |
| View all & re-assign Change Request           | Yes | Setup | Setup |     |     |
| Escalate Change Request/Change CR status      | Yes | Yes   | Yes   | Yes |     |
| Approve Change Request                        |     |       |       | Yes | Yes |
| Change Groups                                 | Yes | Yes   | Yes   | Yes |     |
| Impact analysis                               | Yes | Yes   | Yes   | Yes |     |
| Create Back Out procedure                     | Yes | Yes   | Yes   |     |     |
| Update Workflow State                         | Yes | Yes   | Yes   |     |     |
| Release & Deployment                          |     |       |       |     |     |
| Create/Delete Tasks                           | Yes |       |       |     |     |
| Edit Tasks                                    | Yes | Yes   | Yes   |     |     |

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**Service Manager  
7.0 User Roles  
and Privileges**

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|   |     |       |       |       |       |       |       |
|---|-----|-------|-------|-------|-------|-------|-------|
| View/ Edit other Technicians' Tasks   | Yes | Setup | Setup |       |       |       |       |
| View all & Re-assign Tasks  | Yes | Setup | Setup |       |       |       |       |
| Define a Release  | Yes |       |       |       |       | Yes   |       |
| Define a Deployment Package   | Yes |       |       |       |       | Yes   |       |
| Control Release Lifecycle   | Yes |       |       |       |       | Yes   |       |
| Create and Modify Workflow  | Yes |       |       |       |       |       |       |
| Service Asset & Configuration, Service Portfolio & Service Catalog Management |     |       |       |       |       |       |       |
| Create/Edit/Delete Items  | Yes | Setup | Setup | Setup | Setup | Setup | Setup |
| View/Edit Items   | Yes | Yes   | Yes   | Yes   | Yes   | Yes   |       |
| Search Items  | Yes | Yes   | Yes   | Yes   | Yes   | Yes   | Yes   |
| Re-enable deleted Items   | Yes |       |       |       |       |       |       |
| Create Item Categories, Types & Classifications                               | Yes |       |       |       |       |       |       |
| Create Outages  | Yes | Setup |       |       | Yes   | Yes   |       |
| View Outages  | Yes | Yes   | Yes   | Yes   | Yes   | Yes   | Yes   |
| Assign Contracts  | Yes | Yes   | Yes   | Yes   | Yes   | Yes   |       |
| Service Level Management  |     |       |       |       |       |       |       |
| Define SLAs   | Yes | Yes   |       |       | Yes   | Yes   |       |
| Define Underpinning Contracts   | Yes | Yes   |       |       | Yes   | Yes   |       |
| Define OLAs   | Yes | Yes   |       |       | Yes   | Yes   |       |
| Create Vendors  | Yes | Yes   |       |       | Yes   | Yes   |       |
| Create SLA Breach Codes   | Yes |       |       |       |       |       |       |

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**Service Manager  
7.0 User Roles  
and Privileges**

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|                                       |       |       |       |     |       |       |
|---------------------------------------|-------|-------|-------|-----|-------|-------|
| View SLA breaches                     | Yes   | Yes   | Yes   | Yes |       |       |
| Financial Management                  |       |       |       |     |       |       |
| Create Purchase Orders                |       |       |       | Yes |       |       |
| Process Purchase Orders               |       |       |       | Yes |       |       |
| Create and Assign Contracts           |       |       |       | Yes |       |       |
| Process Contracts                     |       |       |       | Yes |       |       |
| Create and Process Invoices           |       |       |       | Yes |       |       |
| Create, Manage & View Item Costs      |       |       |       | Yes |       |       |
| Forecast Service Item Costs           |       |       |       | Yes |       |       |
| Knowledge Management                  |       |       |       |     |       |       |
| Create Articles/ FAQs                 | Setup | Setup | Setup |     | Setup |       |
| Publish Articles                      | Setup | Setup | Setup |     | Setup |       |
| Create Article Groups                 | Yes   | Setup | Setup |     |       |       |
| Search Articles                       | Yes   | Yes   | Yes   |     | Yes   | Yes   |
| Administer Forums                     | Setup | Setup | Setup |     |       |       |
| Create/Modify/ Reply to topic threads | Setup | Setup | Setup |     |       | Setup |
| Create Surveys                        | Setup | Setup | Setup |     | Setup |       |
| Complete Surveys                      | Yes   | Yes   | Yes   | Yes | Yes   | Yes   |
| Reports                               |       |       |       |     |       |       |
| KPI Reports                           | Yes   | Yes   |       |     | Yes   |       |
| Incident Reports                      | Yes   | Yes   |       |     | Yes   |       |
| Problem Reports                       | Yes   | Yes   |       |     | Yes   |       |

---

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**Service Manager  
7.0 User Roles  
and Privileges**

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|                                  |     |     |       |     |     |     |     |       |
|----------------------------------|-----|-----|-------|-----|-----|-----|-----|-------|
| Change Request Reports           |     | Yes | Yes   |     |     |     | Yes |       |
| Configuration Reports            |     | Yes |       |     |     | Yes | Yes |       |
| Service Agreement Reports        |     | Yes |       |     |     | Yes | Yes |       |
| Contract Reports                 |     | Yes |       |     |     | Yes | Yes |       |
| Organization Reports             |     | Yes |       |     |     | Yes | Yes |       |
| Technician Reports               |     | Yes |       |     |     |     | Yes |       |
| Knowledge Reports                |     | Yes | Yes   |     |     |     | Yes |       |
| Finance Reports                  |     | Yes |       |     |     | Yes | Yes |       |
| Login Reports                    | Yes | Yes |       |     |     |     | Yes |       |
| System Reports                   | Yes | Yes |       |     |     |     |     |       |
| Build Reports                    |     | Yes |       |     |     | Yes | Yes |       |
| Custom Reports                   |     | Yes |       |     |     |     | Yes |       |
| Home                             |     |     |       |     |     |     |     |       |
| Create Alerts                    | Yes | Yes | Setup |     |     |     |     |       |
| View Alerts                      | Yes | Yes | Yes   | Yes | Yes | Yes | Yes | Yes   |
| Enable Quick Calls               | Yes |     |       |     |     |     |     |       |
| Create Quick Call Templates      |     | Yes |       |     |     |     |     |       |
| Set User Preferences             | Yes | Yes | Yes   | Yes | Yes | Yes | Yes | Yes   |
| Disable receiving personal email | Yes | Yes | Yes   | Yes | Yes | Yes | Yes |       |
| Dashboard across Processes       |     | Yes | Yes   | Yes |     |     | Yes |       |
| Customer Portal                  |     |     |       |     |     |     |     |       |
| Create/View/Edit requests        |     |     |       |     |     |     |     | Yes   |
| Edit & close existing requests   |     |     |       |     |     |     |     | Setup |
| View Proposed Solutions          |     |     |       |     |     |     |     | Yes   |

---

---

**Service Manager  
7.0 User Roles  
and Privileges**

---

|                                   |       |
|-----------------------------------|-------|
| Search Knowledge Base             | Yes   |
| View FAQ's                        | Yes   |
| View Service Catalog              | Setup |
| Create Items                      | Setup |
| View Outages                      | Yes   |
| Chat Technician regarding request | Setup |
| Search Forums                     | Setup |
| Complete Surveys                  | Yes   |
| Subscribe to RSS feeds            | Yes   |

---

## 2.5.4 Administrator Role

The Administrator Role performs System Configuration and Setup tasks including:

- ♦ Customizing the application and automated messages
- ♦ Configuring the interaction between external systems, including the authentication servers and asset management tools
- ♦ Enabling Customer, User, Request and System Privileges
- ♦ For systems with Problem Management, set parameters for automatic Problem identification and creation.

---

**NOTE:** Multiple Administrator Roles can be created within the system

It is recommended that organizations create only one or, at maximum, two Administrators. Only an existing Administrator can create other Administrator accounts.

If a User is assigned multiple Roles, the privileges are consolidated within a single User view. See: [Changing Roles](#).

---

## 2.5.5 Supervisor Role

The Supervisor Role provides maximum access to the system for day-to-day management of the service desk and configuration control.

Supervisor Users can:

- ♦ Create User and Customer accounts
- ♦ Assign Roles & Processes
- ♦ Build workflows



- ◆ Configure the CMDB
- ◆ Allocate Technicians to Teams and Escalation Layers
- ◆ Define Service and Operational Level Agreements (SLAs and OLAs) for the organization.

The Configuration Management Database (CMDB) is the central data repository for the support tool. The CMDB allows centralized management of IT infrastructure through Configuration Items (Items). Within the application, everything is tied to Items in the CMDB. Supervisors control the configuration of the CMDB, which includes:

- ◆ Item Categories
- ◆ Lifecycle Templates
- ◆ Item Types
- ◆ Classifications
- ◆ Configuration Items.

---

**NOTE:** The ability to create Items can also be assigned to other Roles, if the Administrator has enabled the option

If a User is assigned multiple Roles, the privileges are consolidated within a single User view. See: [Changing Roles](#).

---

## 2.5.6 Technician Role

The Technician Role is assigned to service desk staff who work on requests.

Technicians are allocated support Processes and can then be assigned to Teams and Escalation Layers. Technicians can belong to any number of Teams within Processes.

When enabled by the Administrator, Technicians can:

- ◆ Create new Customers
- ◆ Create new Items
- ◆ Reassign requests
- ◆ Edit other Technicians' requests
- ◆ Create Alerts
- ◆ Create, edit, publish and delete Knowledge Base Articles by default.

---

**NOTE:** Every Technician must be assigned to a Supervisor

If a User is assigned multiple Roles, the privileges are consolidated within a single User view. See: [Changing Roles](#).

---

## 2.5.7 Partner Role

A Partner User is assigned to a Partner Organization and has the same privileges as a Technician User, but can only view and support Customers associated with their assigned Partner Organization.

A Partner Role gives a User the ability to:

- ◆ Manage their Customers
- ◆ Manage their Customers' requests

- ♦ Create and maintain their Customers' Items
- ♦ View reports.

Users who are assigned the Partner Role must be associated with a Partner Organization, and this is done manually within the User Information screen or within the Partner Organization > Technician tab. Partner Organizations are used in the management of requests between Customers/Organizational Units and external service providers within the support system. It allows multiple Partner Users to be available within a Team, and assigned at relevant levels of escalations for working on requests.

If a Partner User is created and not associated with a Partner Organization, they cannot be assigned to a Team and therefore cannot be assigned to work on requests.

When a request is created for a Partner Organization's Customer it is automatically allocated to the Partner User within the Partner Organization.

## 2.5.8 Manager Role

The Manager Role is a User who can oversee the activities of the service desk or specific Processes. Managers have access to most parts of the system, primarily on a *read-only* basis.

The Manager access can be provided to Users who do not actively participate in the day-to-day happenings of service and support Teams, but may require detailed information about the actions and status of requests.

As a Manager, the User can:

- ♦ Create Customers
- ♦ View requests within their allocated Processes
- ♦ Access the full range of reports
- ♦ Create and modify Items
- ♦ Approve Service and Change Requests. (Based on licenses for Service Manager product.)

Users who manage the service desk and are to be included in Teams with edit access to requests, should be allocated a Supervisor Role.

---

**NOTE:** If a User is assigned multiple User Roles, the privileges are consolidated within a single User view. See: [Changing Roles](#).

---

## 2.5.9 Finance Role

Users with the Finance Role are assigned Service Level Management and Configuration Management by default. Their Role is primarily for driving the service costing models and, if relevant, maintaining the Billing module that uses system Contracts and Purchase Orders.

A Finance User can:

- ♦ Create Customers and Items
- ♦ Project end to end Service costs
- ♦ Complete access to SLA's and OLA's
- ♦ Access reports
- ♦ Bill for services

- ♦ Process payment for Invoices
- ♦ Cancel Maintenance Contracts
- ♦ Manage IT and Service Assets.

---

**NOTE:** A User assigned the Finance Role is the only User with the privilege to process the payment of Invoices

This is relevant for systems that have the Invoice option enabled in the Billing Setup.

If a User is assigned the Supervisor and Finance Role, the privileges are consolidated within a single User view. See: [Changing Roles](#).

---

## 2.5.10 Customer Role

The Customer Role is for users who submit Service Requests, Incidents and possibly Change Requests to the service desk.

Within the system, based on the system configuration, Customers can:

- ♦ Create and manage requests via email
- ♦ Create, view or edit their requests through the Customer Portal
- ♦ Self-diagnose issues using the Knowledge Base
- ♦ Access proposed Solutions during the request creation process
- ♦ Participate in a live chat with Technicians to discuss their issues
- ♦ Subscribe to RSS feeds for the latest information on their requests
- ♦ Access the Knowledge Base, Forums and FAQs
- ♦ Customers have access to their Items' Outages information
- ♦ View all Services offered by the Service Organization, if enabled for the system
- ♦ Approve Service and Change Requests. (Based on licenses for Service Manager product.)



---

# 3 Reports

## 3.1 Reports



The Reports tab is used to view:

- ◆ [Login Reports](#)
- ◆ [System Reports](#)
- ◆ [Log](#).

These reports provide the Administrator with details of system activity in real time. The Reports outline who has logged into the system and how the application is performing. The Login report can be used to log out Users who have closed a session without logging out.

Within the Log tab, the Administrator can view the system log files and export them when they require assistance with the system.

## 3.2 Login Report

The information displayed on the Login Report screen includes:

- ◆ Recent Logins with IP addresses, host details and login dates for Users who recently accessed the system
- ◆ Alert Manager Statistics showing active Alerts in the system  
Alerts can be created manually by Users and automatically by the system to notify Users about service and support activities.
- ◆ Current sessions, with an End Session option at the bottom of the screen.

---

**NOTE:** Administrator Users can click on Logout to end a User's session. This may be required if a User has disconnected from the system without logging out and needs access to log back in. This option is not required if the Terminate Active Session option is set to Yes in the Setup>Privileges>System tab.

---

## 3.3 System Reports

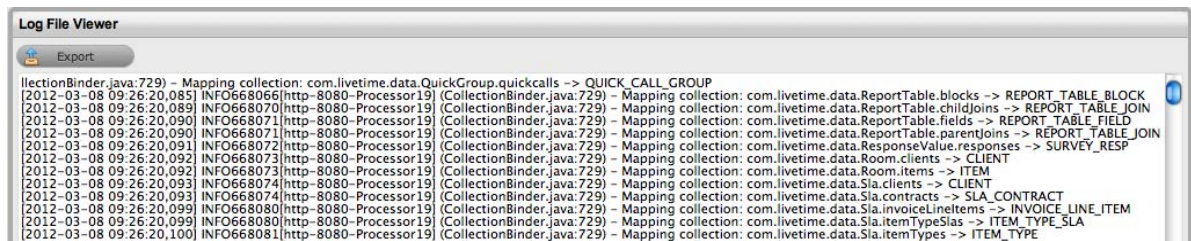
System reports are a real time summary of the system status and environment.

Report information includes:

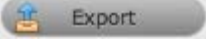
- ◆ Statistics including a summary of key system metrics regarding the current session, the hosting environment and memory usage
- ◆ Overall application and database statistics
- ◆ Tasks lists all background system jobs including Indexing, which allows the Supervisor to view that the system is indexing correctly without sticking
- ◆ Information about the Java Virtual Machine running on the server.

## 3.4 Log File View

To assist with the diagnosis of issues experienced when using the system, the Administrator can access system log files within the Log File Viewer screen. The information contains the last 250K of the 1MB log file.



### 3.4.1 Log File Request

Administrators experiencing issues with the application, can easily export their Log File information using . The output of a log file export, which includes system and license information, can then be uploaded to a pre-existing incident or emailed to your local system support team.

---

# 4 My Account

## 4.1 My Account

The My Account tab allows the User to:

- ◆ Edit personal information and notification preferences
- ◆ Reset their Username and password
- ◆ Set Password questions, if enabled in the system
- ◆ Select the Default Portal and Home tab landing page
- ◆ Set a Time Zone and Date Format.

---

**NOTE:** Fields imported through an LDAP or Active Directory server cannot be changed.

---

### 4.1.1 Editing Account Information

To edit account information:

1. Select Home>My Account

The Account Information screen appears.

| Account Information  |  |
|--|--|
| <span>Edit</span> <span style="float: right;">Simone Supervisor</span> |  |
| First Name   | Simone   |
| Last Name  | Supervisor   |
| Username   | super  |
| Password   | xxxxxxxxxx   |
| Password Question One  | What is the name of your favorite childhood friend?    |
| Answer One   | Lisa   |
| Password Question Two  | What was the name of your first stuffed animal?        |
| Answer Two   | Big Ted  |
| Email  | supervisor@mycompany.com                               |
| Default Portal   | User Portal  |
| Default Home   | Tasks  |
| Notifications  | On   |
| Notify Via   | SMS  |
| Phone  | 02 9997 7779   |
| Mobile   |  |
| Fax  |  |
| Pager  |  |
| Date Format  | mm/dd/yy   |
| Country  | Australia  |
| State  | New South Wales  |
| Time Zone  | (GMT +10:00) Melbourne, Sydney, Canberra, Port Moresby |

2. Click Edit
3. Make the required changes



4.

---

### Account Information

---

|                             |  |
|-----------------------------|--|
| First Name                  | First name of the Account User. If account information is imported via LDAP or Active Directory, First Name will not be editable.  |
| Last Name                   | Last name of the Account User. If account information is imported via LDAP or Active Directory, Last Name will not be editable.  |
| Username                    | Username name of the Account User.   |
| Password                    | Password reset.  |
| Confirm Password            | Re-enter the password to confirm correct entry of the selected password.   |
| Password Question One/Two   | Select questions that are to be asked when the Lost Password link is selected in the Login Page and the challenge questions are required to verify Users details before re-sending the system password.<br><br>(These fields are displayed when Password Questions option has been enabled in Setup>Privileges>System.)                            |
| Answer One/Two              | Enter the answers to the questions.  |
| Default Portal              | Where a User has more than one Role, the Default Role will be the Role used at login.  |
| Default Home                | The User can define the tasks Home tab or the Dashboard tab as the default landing page when they log into the system.   |
| Preferred Communication     | Select Email or SMS as the preferred method of receiving updates from the system.<br><br>This field is visible if the User also has a Customer Role in the system and the Customer Defined Contact option is enabled in Setup>Privileges>CustomerTab. It only applies, when the Team has the Customer Notification option set to Customer Defined. |
| Email                       | Email address for the Account User.  |
| <i>Receive Notification</i> | When set to No the User will not receive system-generated emails when requests are created or updated. Irrespective of the setting in this field when a request is escalated to a User, an email notification will be sent.  |
| Phone, Mobile, Pager        | Telephone, mobile and pager details. If these fields are imported via LDAP or Active Directory they will not be editable.  |
| Date Format                 | Preferred date format.   |

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**Account Information**

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|                    |   |
|--------------------|---|
| Country            | When Country details are entered, if the Country has States, a States list will be displayed. (If the option is not available is the displayed list, additional options can be configured by the Administrator in Setup>Localization> Regions.) |
| Time Zone          | User's Time zone  |
| Available for Chat | Using this option Users can select whether they are available for a Chat request, when the Chat facility is enabled.  |

---

5. Click Save.

## 4.1.2 Receiving Email

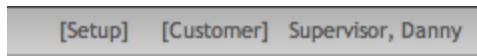
If a User does not wish to receive email notifications when they are assigned a new request, or when changes are made to a request (i.e., a new request Note has been logged by the Customer) set the Receive Email option to No.

It should be noted that regardless of what is selected for the Receive Email option, if a request is escalated to the User, a notification email is forwarded to them by the system.

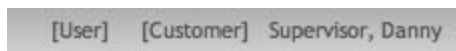
## 4.2 Changing Roles

If a User is assigned more than one Role in the application, they can switch to another Role after logging into the system that provides the User access to their assigned Default Portal.

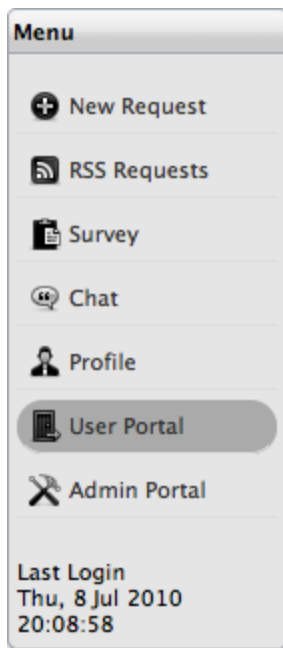
The User Roles of Supervisor or Technician, Finance and Manager are consolidated within one User view. Therefore, if a User is assigned Finance, Manager and Supervisor/Technician access, they can view all functionality related to these Roles within the User view. If the User is also assigned Admin and Customer access, next to their login name, the options of Setup and Customer will be displayed.



The Administrator can access the administrator functionality within the Setup view. If the Administrator is also assigned User and Customer access, next to their login name, the options of User and Customer will be displayed.



Users or Administrators who are also assigned Customer access can view the Customer Portal through the Customer link displayed in the sub-menu bar. Whilst logged in as the Customer, the options of User and Admin Portal will be displayed within the Customer Portal sidebar Menu.



To move to another User Role portal:

1. Log in using the credentials for the default User Role
2. Click on the Setup/User/Customer link, as required.

The screen defaults to the selected functionality.

## 4.3 Alerts

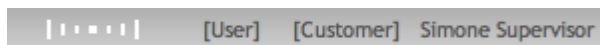
Alerts are an internal mechanism used by Administrators to notify Users about important issues relevant to them or their environment. System generated Alerts are created for Administrator Users when:

- ♦ An ADS/LDAP sync has been performed
- ♦ An AMIE Item import has been completed
- ♦ SLA warnings and breaches.

Alerts generated within the My Account tab can act as reminders or notifications for personal use, for a specific User, or for Users of a particular Role. Alerts can be scheduled to be published and dismissed.

Viewing Alerts

When an Alert is received, the Alert icon flashes in the top right corner, next to the login name:



To view a received Alert:

1. Click on the icon

The Alert screen opens with all current Alerts. The icon in the first column indicates whether the Alert is Information, a Warning or Urgent.



2. Click on the date link in the Publish column to view the details of the Alert
3. Click Done to close and retain the Alert  
Or, select Dismiss to delete it from the pop-up window and disable the flashing icon
4. To dismiss one or multiple Alerts within the Alerts list, check the boxes next to the relevant Alerts and then select the Dismiss option



5. To subscribe to RSS feeds for Alert updates, select the RSS button.

### 4.3.1 Creating Alerts

To create an Alert:

1. Select Home>Alerts
2. Select New  
The Alerts editor appears.
3. Enter a Publish and Dismiss date
- 4.

| Alert Details | Description  |
|---------------|--|
| Created       | The current date and time.   |
| Publish       | The date the Alert is published. Use the calendar icon to the right of the field, to select a Publish date.<br><br>Set to a date in the future, or use the default to publish the Alert immediately. |
| Dismiss       | The date the Alert ceases to be available. Use the calendar icon to the right of the field, to select a Publish date. On this date, the Alert will disappear from a User's Alert list.               |

| Alert Details | Description  |
|---------------|--|
| Severity      | <p>The type of Alert to be published. The choices are:</p> <ul style="list-style-type: none"> <li>◆ Information – for general Alerts</li> <li>◆ Warning – to warn Users of potential issues</li> <li>◆ Urgent – to publish an urgent actionable message.</li> </ul> <p>The icon appearing with the message will depend on the type of Alert.</p>   |
| User          | <p>The type of Users to receive the Alert, which include:</p> <ul style="list-style-type: none"> <li>◆ Specific Customer or User</li> <li>◆ User Role</li> <li>◆ Personal Alert</li> <li>◆ Organizational Units</li> <li>◆ Public.</li> </ul> <p>In the Find User or Customer list, click search to select the recipient from the drop-down list.</p> <p>An Alert sent to a User Role will go to all Users with that Role.</p> <p>A personal Alert appears on the User's own screen at the Publish date.</p> <p>A Public Alert appears when the Public Alert link is selected on the Login Page.</p> |
| Title         | Enter the title of the Alert.  |
| Message       | Enter the main content of the Alert.   |

5. Select the Severity for the Alert message
6. Select the User
  - Options include selecting User Roles, a specific User or personal.
7. Enter a Title for the Alert
8. Enter the Message content for the Alert
9. Click Save

Alerts with current Publish dates will be sent immediately.

**Alert Editor**

Created 02/06/12 13:30

Publish 02/06/12 13:30

Dismiss 02/13/12 00:00

Severity Information

User User Role

Supervisor  Technician  Partner

Manager  Finance  Customer

Title User alert updates

Message

Format Font Family Font Size HTML ABC

**A** **B** *I* U ~~ABC~~ | | x<sub>2</sub> x<sup>2</sup>

To receive alert updates subscribe to an RSS feed.

Path: Words:8

Cancel Save

10. Click Done.

### 4.3.2 Deleting Alerts

Alerts can be deleted within the List View by selecting one or more Alert checkboxes and clicking the Delete button. Alternatively, they can be deleted individually within the Alert Editor information screen by selecting the Delete button.

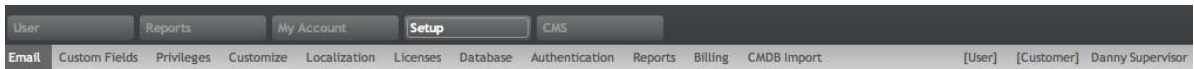
### 4.3.3 SLA Breach Alerts

Alerts are also used by the system to inform Users about SLA breaches. The Alert will be addressed to the User and assigned to the request that has failed to reach an SLA target. The breach will contain information such as the affected Request ID, and how the SLA has been breached.

---

# 5 Setup

## 5.1 Setup Tab



The Setup tab allows the Administrator to configure the application and control the behavior of the system.

The following options are included:

- ◆ Email configuration, including customizing all email templates used by the system
- ◆ Customize fields and Portal messages
- ◆ Integrate the system with external applications, define Open ID options and enable outbound Web Services functionality
- ◆ Define User, Customer, Request and System privileges
- ◆ Localize the application, including language of content automatically generated by the system, public holidays and time-zones for the scheduling functionality
- ◆ Enable the Billing module for using Contracts, Purchase Orders and SLA costs
- ◆ Import Items via a.CSV file and AMIE.

The tabs available within Setup include:

- ◆ [Email](#)
- ◆ [Custom Fields](#)
- ◆ [Privileges](#)
- ◆ [Customize](#)
- ◆ [Localization](#)
- ◆ [Licenses](#)
- ◆ [Database](#)
- ◆ [LDAP](#)
- ◆ [SSO](#)
- ◆ [Reports](#)
- ◆ [Billing](#)
- ◆ [AMIE.](#)

## 5.2 Email

### 5.2.1 Email

The Email sub-menu option is used to configure the system's incoming and outgoing email settings.

The system uses email to notify Customers about:

- ◆ Login information
- ◆ Request creation, updates and closure
- ◆ Contract renewals
- ◆ Invoice management
- ◆ Purchase Order creation.

Emails notify Service Desk Users of:

- ◆ Request allocation
- ◆ Escalations and SLA reminders, warnings and breaches
- ◆ Amendments to requests made by other Users
- ◆ Addition or removal of requests from Groups
- ◆ Required request approvals.

For detailed information regarding managing requests using email polling see [Email Polling and Request Creation](#) in the Appendices of this guide.

### Server Tab

To enter email server details:

1. Select Setup >Email > Server



**Email**

Server Setup Templates SMS Log

**Receiving**

Incoming Server

Protocol **IMAP** IMAPS POP3 POP3S

Transport  TLS

Port  (Leave blank for default)

User Name

Password

**Sending**

Reply To

Outgoing Server

Authentication **None** Login SSL TLS TLS (SSL)

Port  (Leave blank for default)

Reset Test Save

2. Enter the Receiving and Sending Details:

---

## Receiving

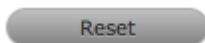
---

|                 |  |
|-----------------|--|
| Incoming Server | The incoming server used by the system to receive emails.  |
| Protocol        | The protocol of the incoming email account- IMAP, IMAPS, POP3, POP3S.  |
| Transport       | This option is visible if IMAP or POP3 has been set for the email account protocol. Select to secure the transport layer to encrypt the whole channel, if relevant to your email server configuration.   |
| Port            | Can be left blank for the default, or enter a port.  |
| Interval        | Enter a timing interval if polling is enabled.<br><br>This will be the period of time the system will use to check if any messages need to be polled.  |
| User Name       | Enter User Name for the incoming mail server.  |
| Password        | Enter the account Password.  |
| Sending         |  |
| Reply To        | The default system email address and the account that the email polling feature uses.  |
| Outgoing Server | The outgoing (or SMTP) server used by the system to send emails.   |
| Authentication  | If your SMTP server requires sender identification before sending email select between Login, SSL or TLS depending on the server configuration. The User Name and Password fields will be displayed when options other than None are selected. |
| Port            | Enter a different port, or leave blank to use the default.   |
| User Name       | When authentication is required, enter the SMTP authorization details.   |
| Password        | When authentication is required, enter the account password.   |

---

3. Click Save.

## Reset Button



To delete the content in all fields within the Server tab, select the Reset button. The system will display a message requiring verification of the Reset selection. Click OK to verify and clear all fields.

## Test Button

Test

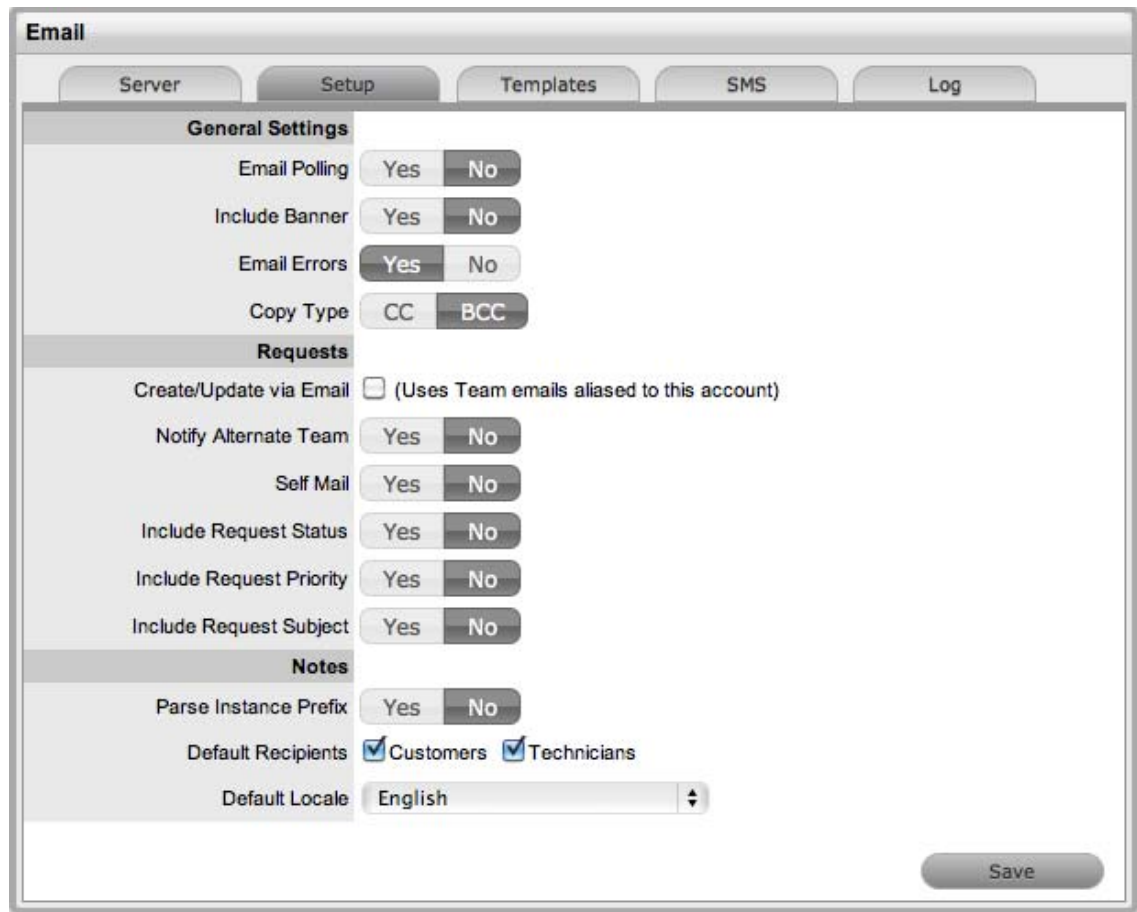
To test if the email configuration is correct for sending email, click Test. This will send a message to the Administrator, using the Outgoing Server details that have been provided.

## 5.2.2 Setup

The Email Setup tab allows the Administrator to define the behavior of the email polling functionality.

To set the email functionality details:

1. Select Setup >Email > Setup



The screenshot shows the 'Email Setup' configuration window. It has a title bar 'Email' and five tabs: 'Server', 'Setup', 'Templates', 'SMS', and 'Log'. The 'Setup' tab is selected. The window is divided into several sections:

- General Settings:**
  - Email Polling: Yes (selected), No
  - Include Banner: Yes (selected), No
  - Email Errors: Yes (selected), No
  - Copy Type: CC (selected), BCC
- Requests:**
  - Create/Update via Email:  (Uses Team emails aliased to this account)
  - Notify Alternate Team: Yes (selected), No
  - Self Mail: Yes (selected), No
  - Include Request Status: Yes (selected), No
  - Include Request Priority: Yes (selected), No
  - Include Request Subject: Yes (selected), No
- Notes:**
  - Parse Instance Prefix: Yes (selected), No
  - Default Recipients:  Customers  Technicians
  - Default Locale: English (dropdown menu)

A 'Save' button is located at the bottom right of the window.

2. Define the settings in line with your organizational requirements:

3.

---

### General Settings

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|                         |   |
|-------------------------|---|
| Email Polling           | <p>Enable Email Polling to allow the application to check for new email received in the mailbox on the incoming server defined within the Server tab.</p> <p>For new messages that are received, the system will send a message to the sender acknowledging their message. System generated messages are customized within the Setup&gt;Email&gt;Templates tab.</p> <p><b>NOTE:</b> This option will be locked down if the Create via Email option is selected.</p> |
| Interval                | <p>Enter the time period the system will use to check the incoming server for any messages sent to the support system.</p>  |
| Include Banner          | <p>Select Yes to include a banner within emails sent from the system.</p> <p>The banner will be derived from:<br/>Setup&gt;Customize&gt;Setup&gt;Public Banner.</p>   |
| Email Errors            | <p>When enabled, details of any system errors occurring while the application is running will be sent to the development lab.</p>   |
| Copy Type               | <p>For emails sent within requests, define if the Technician is to be copied or blind copied the correspondence.</p>  |
| Requests                |   |
| Create/Update via Email | <p>Select this option to enable requests to be created from emails addressed to the support system and Team addresses aliased on the email server. (See: <a href="#">Email Polling</a>.)</p> <p><b>NOTE:</b> Email Polling will be locked down to Yes when this option is selected and the Accept Anonymous option is displayed.</p>  |
| Accept Anonymous        | <p>When enabled, the system will create requests from emails received from email addresses that do not exist in the application's database. (Refer below for more information regarding this setting.)</p>  |
| Notify Alternate Team   | <p>When enabled, and if there is more than one Team created for a Process, within the Summary tab of a request the Alternate Team field is displayed. Members of the Alternate Team will be notified relative to the settings defined for the Current Team, and for New Notes, if Technicians is selected in the New Notes screen.</p>  |
| Self Mail               | <p>When set to Yes, new Notes created by a Technician or Customer are also sent to them when they save the Note.</p>  |

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## General Settings

---

|                          |   |
|--------------------------|---|
| Include Request Status   | When enabled, the system will include the request Status within the Email Subject line of any correspondence sent from the system, regarding a request.   |
| Include Request Priority | When enabled, the system will include the request Priority within the Email Subject line of any correspondence sent from the system, regarding a request.   |
| Include Request Subject  | When enabled, the system will include the content from the Subject line of a request within the Email Subject line of any correspondence sent from the system, regarding a request.   |
| Notes                    |   |
| Parse Instance Prefix    | The Instance prefix is used to process email correspondence from multiple instances. If this is not required, set the option to No.   |
| Default Recipients       | Within the new Notes editor of requests, the default email settings can be defined for the recipient groups. Define the groups who are more likely to be sent every New Note created related to a request.  |
| Default Locale           | Set the default language file to be used for email correspondence. The option set is applied to the Email Locale field in the Customer and User Information screens and can adjusted on a per account basis, as required.<br><br><b>NOTE:</b> The content for automated emails sent from the system for languages other than English, is defined within the Localization>Content tab. |

---

4. Click Save.

## Receiving emails from anonymous email addresses

When the Accept Anonymous option is enabled, the system will create requests from emails received from email addresses not recorded in the application. This process is managed by the System User being assigned as the Customer, and the original sender being added to the email address list, in the Notify section.

It should be noted, that enabling this option increases the likelihood of spam emails being converted into unwanted requests in the system. Email administrators should ensure that spam filtering is performed prior to the request being received in the inbox polled by the application. It is not the function of the service management tool to monitor, parse or filter emails prior to the creation of records based on the contents of the target inbox.

## 5.2.3 Templates

### Email Templates

Administrators can customize the content and template details for emails automatically generated by the system within the Templates tab.

The labels for the Templates are generated in English, but can be customized within the [Setup>Localization>Content](#) tab.

The filter views within the Templates tab include:

| View Option             | Description   |
|-------------------------|---|
| Full Email Templates    | Allows Users to customize the content and insert <a href="#">parameters</a> of emails automatically generated and sent by the system.   |
| Email Summary Templates | Users configure the content of templates that are included in the automatically generated emails, which summarize the specific details of the matter at hand. See: <a href="#">Summary Templates</a>  |
| Email Keywords          | Allows Users to enter alternative words for the system to use when sending mail and parsing emails received at the support email address.<br><br>See: <a href="#">Keywords</a> for a description of where the words are used by the system. |
| Error Message Templates | Allows the Use to customize the error messages automatically generated and sent by the system. See: <a href="#">Error Messages</a> .  |
| Out of Office           | Allows the User to customize multiple Out of Office options for the system to identify in incoming email Subject lines, so it knows to ignore the email. See: <a href="#">Out of Office</a> .   |
| SMS Templates           | Allows Users to customize the content and insert <a href="#">parameters</a> for text messages automatically generated and sent by the system.   |

Content for the automatically generated email messages sent by the system is configured within the Full Email Templates filter screen of the Email > Templates tab. In addition to customizing the content of the messages, there is also the facility to insert parameters for specific details sourced from the database.

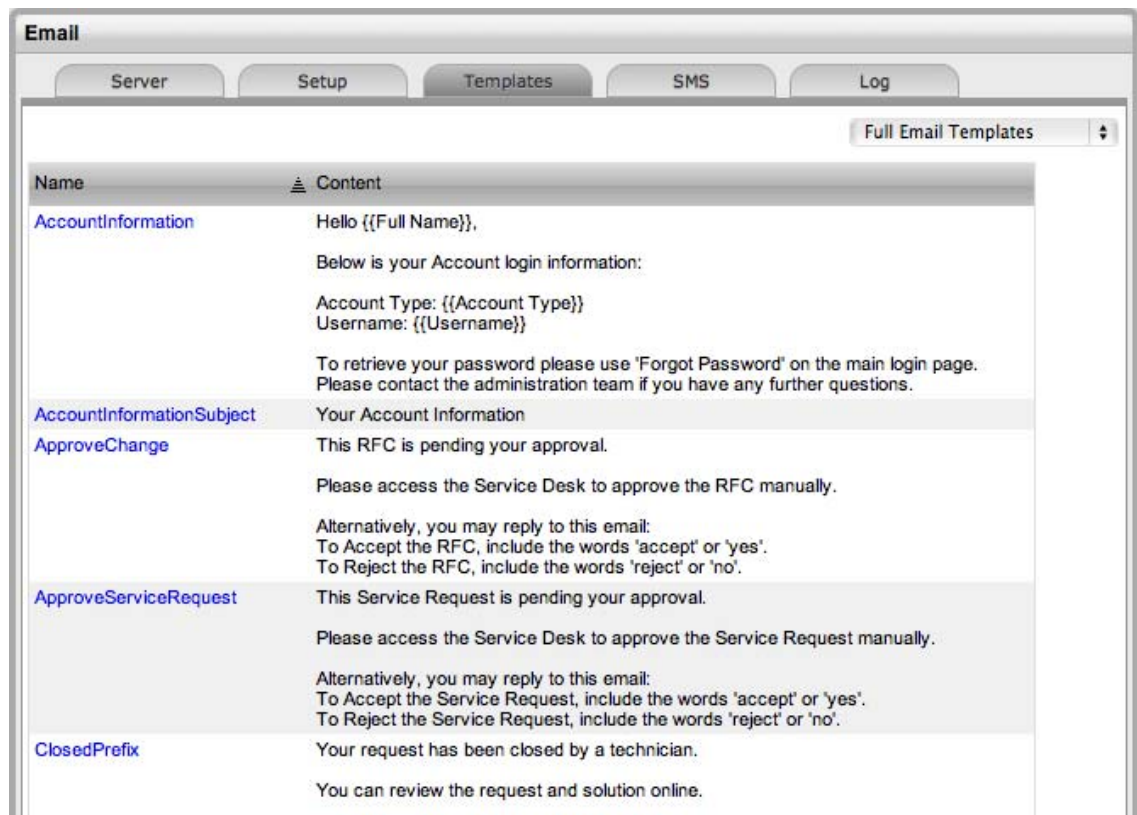
The template parameters, look and feel of email messages sent in regard to Knowledge Base Articles, Items, Requests, Invoices and Contracts are configured within the Email Summary Templates filter screen of the Templates tab.

### Configuring Full Email Templates

To configure messages:

1. Select Setup>Templates>Full Email Templates filter

The Full Email Template filter screen is displayed.




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## Email Templates

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|                            |   |
|----------------------------|---|
| AccountInformation         | Sent when a Customer or User is emailed the login details of their account.   |
| AccountInformation Subject | Content to be included in the Email Subject line when a Customer or User is emailed the login details of their account.   |
| ApproveChange              | Message sent to Managers when an RFC moves to an Approval State.<br><br>The configured message must indicate to Managers that they are specific with their reply, using:<br><br>The words 'accept' or 'yes', to Accept the Change<br><br>The words 'reject' or 'no', to Reject the Change.              |
| ApproveServiceRequest      | Message sent to Managers when a Service Request moves into an Approval State.<br><br>The configured message must indicate to Managers that they are specific with their reply, using:<br><br>The words 'accept' or 'yes', to Accept the Change<br><br>The words 'reject' or 'no', to Reject the Change. |
| ClosedPrefix               | Included at the beginning of the email when a request is closed.  |

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## Email Templates

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|                                    |  |
|------------------------------------|--|
| ClosedTimeout                      | Used by the handshake facility and prefaces emails sent as Incident Note using the Propose button.   |
| CloseRequest                       | Message included in the Email that uses the handshaking facility and proposes a Solution to the Customer.  |
| CloseRequestLink                   | The message sent with the hyperlink to enable Customers to keep a request open after a possible solution has been sent to them. This template is used in conjunction with the CloseRequest message when the Handshaking facility is used to by a Technician to propose a Note as a solution.       |
| ContractExpired Message            | Email sent to a Customer when a Contract has expired and a new request is logged or an existing request is still open when the expiration date is hit.   |
| ContractTimeElapsed (Subject Line) | Subject line for ContractExpiredMessage, which is the email sent to a Customer when a Contract period has elapsed or all purchased support hours have been used.   |
| ContractTimeLow                    | Email sent to a Customer when the amount of time remaining on a Contract triggers the low time percentage threshold. (The default percentage is defined in the Setup>Billing>Contracts tab.)   |
| CreateChange                       | Included at the beginning of the email to a Customer when a Change Request is first created.   |
| CreateIncident                     | Included at the beginning of the email to a Customer when an Incident is first created.  |
| CreateProblem                      | Included at the beginning of the email to a Customer when a Problem is first created.  |
| CreateServiceRequest               | Included at the beginning of the email to a Customer when a Service Request is first created.  |
| InvoicePrefix                      | Included at the start of an email sent to the Customer with a newly created Invoice.<br><br>(This email content is also used for the email sent to Customers when the Setup>Billing>Contracts option is enabled and the number of days for the Subscription "Contract Renewal Time" is triggered.) |
| ItemStatusChangePrefix             | Included at the beginning of the email sent to a Customer when an Item Status has been amended and the option to notify customer is selected in the Item Information tab.  |
| LDAPInformation                    | Sent when a new Customer or User is emailed the login details of their account after an authentication server synch.   |
| NewAttachmentToTech                | Sent when to a User when a new attachment is added to a request in the Customer Portal.  |

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## Email Templates

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|                                    |  |
|------------------------------------|--|
| NoAccount                          | <p>This message is sent to a Customer when they have attempted to log an Incident via Email but are not registered with the system.</p> <p><b>NOTE:</b> The Subject line of this email can be customized in the Error Message Templates filter of the Email&gt;Templates tab.</p>  |
| NoContractCreate<br>RequestSummary | <p>Message sent to a Customer to inform them that work cannot commence on newly logged request as no contract is in place.</p>   |
| NoContractReminder<br>Summary      | <p>Reminder message sent to a Customer to inform them that work cannot commence on newly logged request as no contract is in place.</p>  |
| NoteClosedPrefix                   | <p>Email sent to a Customer when they have sent an email Note to the system, when a request was already closed.</p>  |
| NotePrefix                         | <p>Included each time a new Note is associated with an existing request.</p>   |
| PasswordLost                       | <p>Sent when a Customer or User is emailed their account information for login as a result of their selecting the Forgot Password link on the Login Page.</p>  |
| PasswordQuestion                   | <p>Sent when a Customer or User is emailed a challenge question for resetting their password for login as a result of their selecting the Forgot Password link on the Login Page. (The Password Questions option is enabled in the Setup&gt;Privileges&gt;System tab. The questions/answers are set within the Customer/User My Account Information screen.)</p> |
| PasswordReset                      | <p>Sent when a Customer or User is emailed their account information for login after their Password has been re-set within the Customer Information or User Information screen.</p>  |
| PlannedOutagePrefix                | <p>Included in the email sent when an Item is scheduled to be taken offline.</p>   |
| RequestAccepted<br>Prefix          | <p>Acknowledgement sent to the person responsible for a Request in an Approval State, when a Request is approved.</p>  |
| RequestDeescalate<br>FromTo        | <p>When a request is manually de-escalated this message is sent to the newly assigned Technician.</p>  |
| RequestDeescalate<br>NotAvailable  | <p>When a request is manually de-escalated this message is sent to the previously assigned Technician to let them know that the request is no longer available for them to work on.</p>  |
| RequestEscalateFromTo              | <p>When a request is manually escalated this message is sent to the newly assigned Technician.</p>   |

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## Email Templates

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|  |  |
|--|--|
| RequestEscalateNotAvailable              | When a request is manually escalated this message is sent to the previously assigned Technician to let them know that the request is no longer available for them to work on.            |
| RequestReassignedManager<br>Prefix       | This message is sent when the Manager responsible for processing the approval of a request is changed and is sent to the previously assigned Manager.                                    |
| RequestReassignedManager<br>ToTechPrefix | The message included in an email when a request moves from a Manager Approval State to the newly assigned Technician User.   |
| RequestReassignPrefix                    | When a request is reassigned this message is sent with the request details to the previously assigned User.  |
| RequestReassignToPrefix                  | When a request is reassigned this message is sent with the request details to the newly assigned User.   |
| RequestRejectedPrefix                    | Acknowledgement sent to the person responsible for a Request in an Approval State, when a Request is rejected.   |
| RequestStatusChanged<br>Prefix           | The content of an email sent when the Status of a request is moved from Pending-No Contract to the default open state of the assigned Workflow. This is sent to the assigned Technician. |
| RequestStatusChanged<br>Subject          | The content of the sent when the Status of a request is moved from Pending-No Contract to the default open state of the assigned Workflow. This is sent to the assigned Technician.      |
| RequestWorkaround                        | Message sent when a Workaround is applied to a request in the Analysis tab and emailed to the Customer.  |
| Responder                                | Message sent from the monitored email account when the system does not accept new requests via email.  |
| Signature                                | The details included at the bottom of emails sent from the system.<br><br><b>NOTE:</b> Signatures can be customized on a per Team basis in the Setup>Localization>Content tab.           |
| SlaBreached                              | Email sent to the assigned User when an SLA is breached.   |
| SlaBreachedSubject                       | The content in the Subject line of an email sent to an assigned User and Service Level Manager, and if configured within the SLA the Team Lead, when an SLA is breached.                 |
| SlaTimeElapsed                           | Sent to the assigned User and Service Level Manager, and if configured within the SLA the Team Lead, when an SLA Reminder/Warnings is triggered.   |

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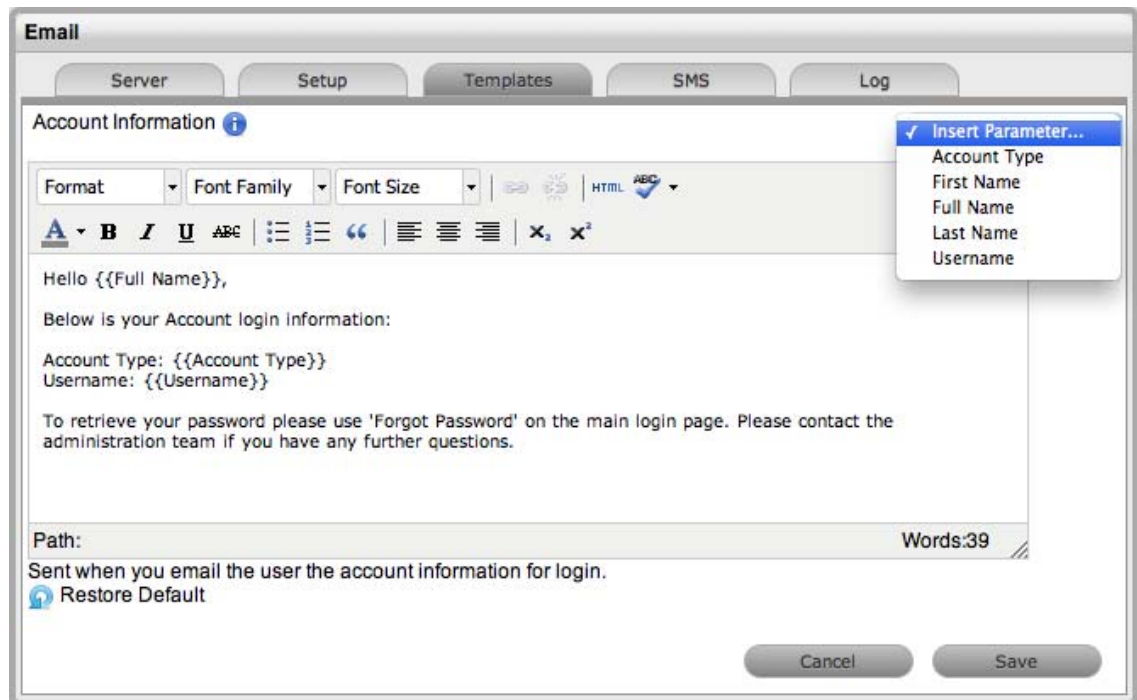
## Email Templates

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|                       |  |
|-----------------------|--|
| SlaTimeElapsedSubject | The content in the Subject line of an email sent to an assigned User and Service Level Manager, and if configured within the SLA the Team Lead, when an SLA Reminder/Warning is triggered. |
| SurveyCompleted       | Thank you message automatically generated for Customers who have submitted a completed survey.   |
| SurveyPrefix          | Message sent when a Customer or User is invited to complete a survey.  |
| SurveyReminderPrefix  | Message sent to a Customer or User to remind them to complete a survey.  |

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2. Click on the required message name link  
The default text will be displayed.
3. Edit the message including inserting any relevant [Parameters](#)



4. Click Save.

---

**NOTE:** Approval Change, Approval Service Request, Create Problem and Create Change, Create Service Request apply to Service Manager Only.

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## Approval Messages

As the system allows Managers to approve or reject RFCs and Service Requests via email, the automatically generated emails must include specific instructions for the Manager to include either the words "accept" or "yes" to approve the RFC, or "reject" or "no" to reject the RFC in their reply. This is essential as the system will only recognize these key words when it automatically processes the email reply sent by the Manager.

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**NOTE:** This is only applicable to Service Manager.

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To use the [Manager Approval Process](#) via email, the system's email set-up must include the activation of the Email Polling functionality and the relevant Team details must include an incoming email address.

## Request Approval Process

As part of the Request Fulfillment approval process, Users that have a Manager Role and are assigned to a Service Request Team can approve or reject Service Requests. To allow a Manager to approve a Request they must be assigned to the Service Request Workflow Approval State. (See: [Service Request Teams](#).) Then, when a Request is moved into an Approval State, the Manager is assigned the Request allowing them to view and reject or accept the Request.

The security of the approval process can be enhanced by forcing the assigned Manager to re-enter their User Name and Password when processing a request. This is achieved by enabling the Strong Authentication option for the Team. (See: [Service Request Teams](#).)




The service management system allows Managers to approve a Request either via the application's interface or email.

### Accept or Reject a Service Request via the application

1. Select the Request tab
2. Select the filter option Pending Approvals  
From the list provided select a Request ID hyperlink.
3. Click Edit

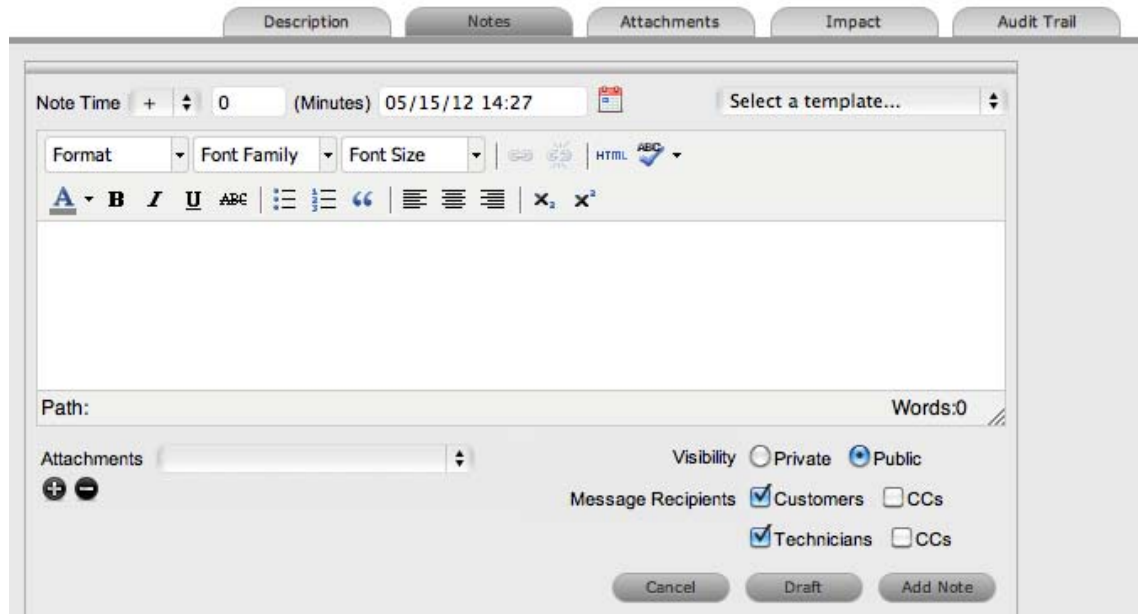
The Accept and Reject will be available to process the Request.



4. Select the Next Action option  
Click  (Accept) or  (Reject) button to move the Service Request into the relevant pre-defined state and re-assign the Request to a Technician allocated to the status.
5. Enter Authentication details, if prompted  
When the Strong Authentication option is enabled for the Change Team associated with the request, an Approve Change Request window is displayed prompting the User to enter their Password details. Enter your Password and select the Authenticate button and click  to close the pop-up window.

6. Enter additional details in the Notes Tab, if relevant

A Notes window is displayed to allow the Manager to add detailed information regarding the approval option selected.



7. Click Add Note.

Note that the Manager User will no longer be able to edit the Request after the selection is made, and the Request will continue through the Service Request Workflow Lifecycle.

8. **NOTE:** If the Approval State is configured to be an Item Details Editable state, the Manager can amend the Item details when in this State.

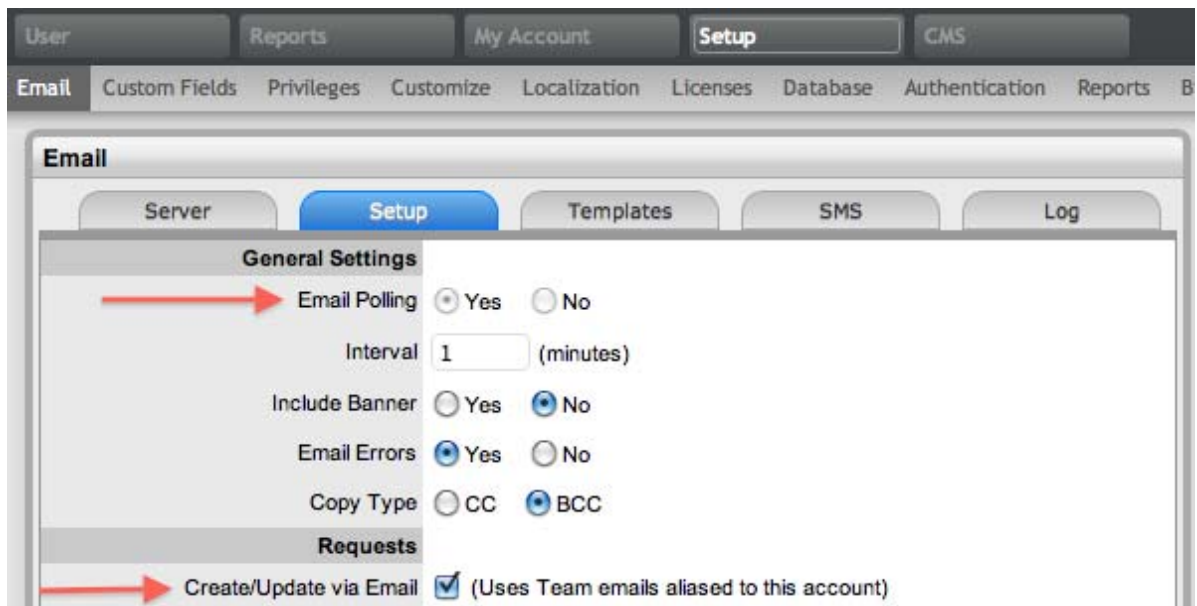
## Accept or Reject a Request via email

To use the Manager Request approval process via email, the following configuration must be in place:

The Administrator must configure the system Setup>Email screens to include:

- ♦ Email Polling functionality
- ♦ Create via Email option
- ♦ Customise the ApproveServiceRequest email content, as required.

The Supervisor must also include an incoming email address for the Service Request Team.



When a Service Request is escalated to an Approval State, an email is sent to the assigned Manager User informing them that a Request is pending approval. The Manager can approve or reject the Service Request by simply replying to the escalation email using the words Accept /Yes or Reject/No.

When the system polls for incoming email, the Manager's response is automatically applied to the relevant Request and based on the Manager's response, the Request is routed to a Technician allocated to the next Workflow State. The Manager is also sent a confirmation email informing them that their selected action has been applied to the Request.

Example of email sent to Manager:

This Service Request is pending your approval.

Please access the Service Desk to approve the Service Request manually.

Alternatively, you may reply to this email:

To Accept the Service Request, include the words 'accept' or 'yes'.

To Reject the Service Request, include the words 'reject' or 'no'.

| Service Request Information |                                       |
|-----------------------------|---------------------------------------|
| <b>Service Request #:</b>   | 100016                                |
| <b>Date Opened:</b>         | 11/25/09 13:01 (MM/dd/yy HH:mm)       |
| <b>Classification:</b>      | General                               |
| <b>Technician:</b>          | Manager User                          |
| <b>Item #:</b>              | 100002                                |
| <b>Item Type:</b>           | Service Desk                          |
| <b>Identifier:</b>          |                                       |
| <b>Customer:</b>            | Dan Springer                          |
| <b>Org Unit:</b>            |                                       |
| <b>Customer Room:</b>       |                                       |
| <b>Country:</b>             |                                       |
| <b>Due Date:</b>            | 11/25/09 16:01                        |
| <b>Description:</b>         | Request to update to Microsoft Vista. |

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LiveTime Software, Inc  
<http://www.livetime.com>

## Email Parameters

The drop-down options included in the Email Parameters lists used within the Full Email Templates throughout the application, are drawn from the following parts of the system:

Parameter options for Account Information, LDAP Information, Password Information templates:

| Parameter    | Source  |
|--------------|---|
| Account Type | The Default User Role derived from the Customer or User information screen.   |
| First Name   | Derived from Customer or User information screen.   |
| Full Name    | Derived from Customer or User information screen and combines the First and Last Name.  |
| Password     | Derived from Customer or User information screen.   |
| Title        | Derived from Customer or User information screen.<br><br><b>NOTE:</b> This option is visible if Enable Titles is selected within the Admin>Setup>Privileges>Customer. |
| Username     | Derived from Customer or User information screen.   |

Parameters for the request, Approve Change, Approve Service Request, Closed, Closed Timeout templates:

| Parameter              | Source   |
|------------------------|--|
| Classification         | Drawn from the Classification field, in the Summary tab of a request.  |
| Close Date             | Shows the Close Date as recorded in the Service Terms information of the request.  |
| Country                | Derived from the Country field window in the Customer Tab of a request.  |
| Customer Name          | Derived from the Customer Field in the Summary tab of a request.   |
| Customer Phone         | Derived from the Contact Phone Field in the Summary tab of a request.  |
| Customer Room          | Derived from the Item Room Field in the Summary tab of a request.  |
| Date Style             | Detail drawn from the Admin>Setup>Privileges>Customer tab.   |
| Due Date               | Derived from the Service Terms window in the Summary Tab of a request.   |
| Email Locale           | Derived from the Contact tab of the Customer Information details.  |
| FSC Date               | Derived from the Service Terms window in the Summary Tab of a Change Request.  |
| Handshaking Close Days | Derived from the Org Unit associated with the Customer or number of default days defined in the Setup>Privileges>Requests tab. |
| Identifier             | Derived from the Item Identifier Field in the Summary tab of a request.  |



| Parameter           | Source   |
|---------------------|--|
| Item #              | The Item Number is derived from the Item details recorded in the Customer Tab of a request.  |
| Item Type           | The Item Type is derived from the Item details recorded in the Customer Tab of a request.  |
| Last Note ID        | Shows the system generated Note identification number as a hyperlink, for the Note last added to a request. When clicked by the Customer or User, defaults to the request information screen for that request inside the system. |
| Notes               | Details the number of Notes added to a request.  |
| Open Date           | Derived from the Service Terms window in the Summary Tab of a request.   |
| Org Unit            | Derived from the Org Unit field window in the Customer Tab of a request.   |
| Priority            | Derived from the Priority Details as recorded in the Summary tab of a request.   |
| Process             | Shows if the request is a Service Request, Incident, Problem or Change.  |
| Request Description | Derived from the initial Description entered for the request, as recorded in the Summary tab.  |
| Request Id          | Shows the system generated request identification number.  |
| Request URL         | Shows the request identification number as a URL to allow the Customer to enter the system within the specific request screen by clicking the URL.   |
| Subject             | Derived from the Subject entered for the request that is populated from an Email Subject line or directly into the application, and recorded in the Summary tab.   |
| Team                | Shows the Team assigned to manage the request.   |
| Team Phone          | Display the Team telephone number as recorded in the Team Information screen.  |
| Technician Name     | Shows the name of the Technician assigned to the request.  |
| Title               | Derived from Customer or User information screen.<br><br><b>NOTE:</b> This option is visible if Enable Titles is selected within the Admin>Setup>Privileges>Customer.  |

Parameter available in Contract Time templates:

| Parameter | Source  |
|-----------|---|
| Threshold | Draws the percentage from the Threshold field in the Setup>Billing>Contracts tab. |

Options for the Invoice templates:

| Parameter                               | Source  |
|---|---|
| Adjustment                              | Drawn from the Cost Calculations field, and is the amount that is deducted from the sub-total.  |
| Customer Name                           | Derived from the Customer Details Name field on the invoice.  |
| Customer Title                          | Derived from Customer Information screen.<br><b>NOTE:</b> This option is visible if Enable Titles is selected within the Admin>Setup>Privileges>Customer. |
| Delivery Status                         | Shows the assigned Delivery Status from the Invoice.  |
| Due Date                                | Drawn from the Order Details of the invoice.  |
| Entered By                              | Drawn from the Order Details of the invoice.  |
| Invoice #                               | Shows the system generated Invoice Number.  |
| Invoice Date                            | Drawn from the Order Details of the invoice.  |
| Invoice Status                          | Derived from the Status field of the invoice.   |
| Line Items Total                        | Derived from the Costs section of the Invoice and shows the overall cost for Items on the invoice.  |
| List of Item Type Line Items            | When Items are associated with an invoice, shows the details recorded in the Item Type field.   |
| List of Maintenance Contract Line Items | When Contracts are associated with an invoice, shows the details recorded in the Contract Type Name field.  |
| Notes                                   | Shows any details recorded in the Notes field of the invoice.   |
| Order Date                              | Drawn from the Order Details and shows the date the invoice was received.   |
| Org Unit                                | Derived from the Customer Details and shows the customer's associated Org Unit.   |
| PO Number                               | Drawn from the Order Details and shows the Purchase Order number associated with the invoice.   |
| Payment Date                            | Shows date of payment for the invoice based on details recorded in the Invoice Status section.  |
| Payment Status                          | Shows if payment has been received for the invoice based on details recorded in the Invoice Status section.   |
| Processed By                            | Drawn from the Order Details and shows the name of the User who processed payment of the invoice.   |
| Shipping                                | Shows the Shipping Costs as derived from the Costs section of the invoice.  |
| Shipping Date                           | Derived from the Status section of the invoice and shows the expected shipping date of goods.   |

| <b>Parameter</b>     | <b>Source</b>  |
|----------------------|--|
| Tax                  | Drawn from the Costs Section and shows the tax applied to the invoice.         |
| Tax Rate             | Drawn from the Costs Section and shows the tax rate applied to the invoice.    |
| Terms and Conditions | Shows details recorded in the Terms and Conditions field of the invoice.       |
| Total                | The Grand Total of the Invoice, including tax and any adjustments.             |
| Tracking Number      | Drawn from the Tracking Number field within the Status section of the Invoice. |

Parameters for the Item Status Change template:

| <b>Parameter</b> | <b>Source</b>   |
|------------------|---|
| Category         | Shows the Item Category from the Item Information tab.                              |
| Criticality      | Shows the assigned Criticality of the Item as recorded in the Item Information tab. |
| Item Number      | Shows the Item Number as recorded in the Item Information tab.                      |
| Item Type        | Details the Item Type as entered in the Item Information tab.                       |
| Status           | Shows the Status of the Item as recorded in the Item Information tab.               |

Parameter for the New Attachment template:

| <b>Parameter</b> | <b>Source</b>  |
|------------------|--|
| File Name        | Allows the file name of the newly received attachment to be included in the email to the User. |

Parameters for the Escalation templates:

| <b>Parameter</b>    | <b>Source</b>  |
|---------------------|--|
| Current Technician  | Shows the name of the newly assigned Technician.   |
| Previous Technician | Shows the name of the Technician who was previously assigned the request.                  |
| Process             | Shows the ITIL Process of the request, i.e., Change, Incident, Problem or Service Request. |
| Request ID          | Shows the Request identification number.   |

Parameters for the request Status update templates:

| Parameter       | Source   |
|-----------------|--|
| New Status      | Shows the details of the newly assigned Workflow State.                                    |
| Previous Status | Shows the Status name of the previously assigned to the request.                           |
| Process         | Shows the ITIL Process of the request, i.e., Change, Incident, Problem or Service Request. |
| Request ID      | Shows the Request identification number.   |

Parameters for the SLA templates:

| Parameter    | Source   |
|--------------|--|
| Hr/Min       | Shows the time as recorded in hours or minutes, based on the SLA configuration.            |
| Name         | Shows the name of the SLA.   |
| Phase        | Shows the SLA phase of Response Time, Restoration Time or Resolution Time.                 |
| Process      | Shows the ITIL Process of the request, i.e., Change, Incident, Problem or Service Request. |
| Time Elapsed | Shows the amount of time passed for the phase of the SLA.                                  |
| Time Limit   | Shows the amount of total time associated with the phase of the SLA.                       |

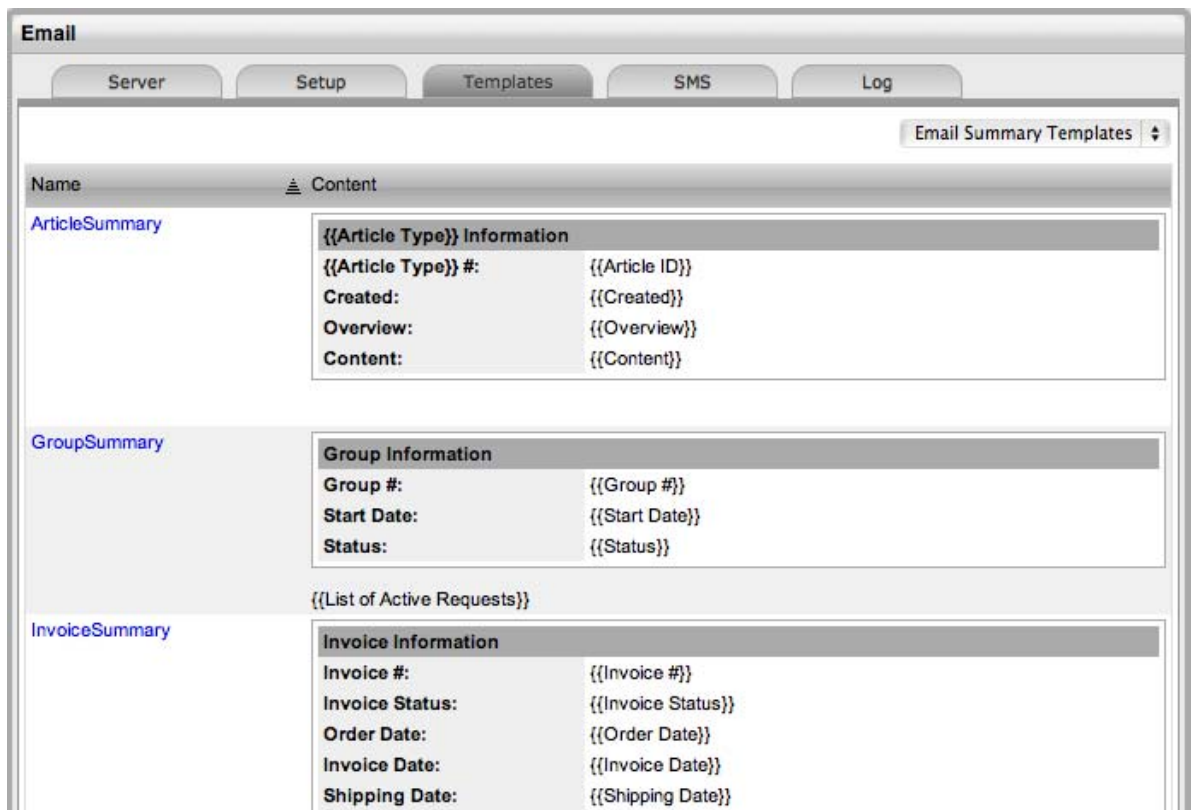
Parameters for the Survey templates:

| Parameter           | Source   |
|---------------------|--|
| Description         | Shows the content included in the Description field of the survey. |
| Name                | Shows the Title of the survey.                                     |
| Number of Questions | Shows the number of questions included in the survey.              |

## Email Summary Templates

Automated email messages sent in relation to requests, Knowledge Base Articles, Items, Invoices and Contracts include a summary table of information or template. The information included in these tables, parameters, look and feel are configured within the Email Summary Templates filter screen of the Templates tab.

Knowledge of HTML would be useful when customizing the templates, but is not mandatory.



The templates for messages that can be configured within this screen include:

| Message               | Description  |
|-----------------------|--|
| Article Summary       | Email that notifies User about the pending Review date of a Knowledge Base Article.  |
| Group Summary         | Email sent to the Users when a Request Group is created, updated or closed.  |
| Invoice Summary       | Email sent to a Customer that summarizes their Invoice information and included in all correspondence regarding the Invoice. This is forwarded with the InvoicePrefix content that is configured in the Email>Templates>Full Email Templates filter view.<br><br>This template is also used for the email sent to Customers when the Setup>Billing>Contracts option is enabled and the number of days for the Subscription "Contract Renewal Time" is triggered. |
| Item Summary          | Email sent to a Customer when a Service Item moves into an inactive State, when the email notification option is selected within the Item.   |
| MaintContract Summary | Email sent to a Customer including their service maintenance contract details.   |
| Request Summary       | Email sent to Users when a request is created or updated.  |

| Message        | Description   |
|----------------|---|
| Survey Summary | The survey summary template is included in system generated emails regarding survey notification and reminders. |

To customize the message template:

1. Select Setup > Email > Templates
2. Select the Email Summary Templates filter
3. Click the Template Name hyperlink

The HTML editor appears.

4. Modify the table, as required

As part of the customization, the Administrator can use system parameters included in the Insert Parameter drop down list. Using these options ensures the customized template includes the correct format for the information to be sent in the email.

- 5.

| Icon             | Description  |
|------------------|--|
| Insert Parameter | The drop-down list options ensure that the HTML correct format is used for these details to be included on the customized message. |
| Restore Defaults | Restores the System default email message.   |

6. Adjust the Date Style format, if relevant
7. Click Save.

## Template Field Options

### ArticleSummary

This template is included in the system generated emails for Knowledge Base Article reviews.

| Field         | Source  |
|---------------|---|
| Article ID    | Knowledge Base Article number.                                |
| Article Title | Displays content drawn from the Title field.                  |
| Article Type  | Shows if it is a general Article, Solution Workaround or FAQ. |
| Content       | Drawn from the Title field of a KBA.                          |
| Created       | Displays the date the Article was created.                    |
| Overview      | Derived from the Problem field of a KBA.                      |

### GroupSummary

This template is included in system generated emails when a request group is created, updated and closed.

| Field                   | Source  |
|-------------------------|---|
| Description             | Derived from the Description field on the Details tab of a requests group.          |
| Group #                 | The identifying group number generated by the system for the request group.         |
| List of Active Requests | Indicates the number of requests in an Active State contained in the request group. |
| Name                    | Drawn from the Name field on the Details tab of a request group.                    |
| Start Date              | Is derived from the date that a request group is created.                           |
| Status                  | Derived from the Status field on the Details tab of a request group.                |

## InvoiceSummary

The Invoice Summary template is used when the Email button is selected within the Invoice Editor screen and when an Invoice is created and updated.

| Field                                   | Source  |
|---|---|
| Adjustment                              | Drawn from the Cost Calculations field, and is the amount that is deducted from the sub-total.  |
| Customer Name                           | Derived from the Customer Details Name field on the invoice.  |
| Customer Title                          | Derived from Customer Information screen.<br><br><b>NOTE:</b> This option is visible if Enable Titles is selected within the Admin>Setup>Privileges>Customer. |
| Delivery Status                         | Shows the assigned Delivery Status from the Invoice.  |
| Due Date                                | Drawn from the Order Details of the invoice.  |
| Entered By                              | Drawn from the Order Details of the invoice.  |
| Invoice #                               | Shows the system generated Invoice Number.  |
| Invoice Date                            | Drawn from the Order Details of the invoice.  |
| Invoice Status                          | Derived from the Status field of the invoice.   |
| Line Items Total                        | Derived from the Costs section of the Invoice and shows the overall cost for Items on the invoice.  |
| List of Item Type Line Items            | When Items are associated with an invoice, shows the details recorded in the Item Type field.   |
| List of Maintenance Contract Line Items | When Contracts are associated with an invoice, shows the details recorded in the Contract Type Name field.  |
| Notes                                   | Shows any details recorded in the Notes field of the invoice.   |

| <b>Field</b>         | <b>Source</b>   |
|----------------------|---|
| Order Date           | Drawn from the Order Details and shows the date the invoice was received.                                   |
| Org Unit             | Derived from the Customer Details and shows the customer's associated Org Unit.                             |
| PO Number            | Drawn from the Order Details and shows the Purchase Order number associated with the invoice.               |
| Payment Date         | Shows date of payment for the invoice based on details recorded in the Invoice Status section.              |
| Payment Status       | Shows if payment has been received for the invoice based on details recorded in the Invoice Status section. |
| Processed By         | Drawn from the Order Details and shows the name of the User who processed payment of the invoice.           |
| Shipping             | Shows the Shipping Costs as derived from the Costs section of the invoice.                                  |
| Shipping Date        | Derived from the Status section of the invoice and shows the expected shipping date of goods.               |
| Tax                  | Drawn from the Costs Section and shows the tax applied to the invoice.                                      |
| Tax Rate             | Drawn from the Costs Section and shows the tax rate applied to the invoice.                                 |
| Terms and Conditions | Shows details recorded in the Terms and Conditions field of the invoice.                                    |
| Total                | The Grand Total of the Invoice, including tax and any adjustments.  |
| Tracking Number      | Drawn from the Tracking Number field within the Status section of the Invoice.                              |

## ItemSummary

This template is included in system generated emails for Item Status changes:

| <b>Field</b> | <b>Source</b>   |
|--------------|---|
| Category     | Shows the Item Category from the Item Information tab.                              |
| Criticality  | Shows the assigned Criticality of the Item as recorded in the Item Information tab. |
| Item Number  | Shows the Item Number as recorded in the Item Information tab.                      |
| Item Type    | Details the Item Type as entered in the Item Information tab.                       |
| Status       | Shows the Status of the Item as recorded in the Item Information tab.               |



## MaintContractSummary

This template is included in system generated emails regarding the creation and update of service contracts.

| Field         | Source  |
|---------------|---|
| Contract #    | Shows the system generated Contract Number.                       |
| Contract Type | Specifies if the Contract is a Per Incident or Per Item Contract. |
| End Date      | Includes the date the current Contract date ends.                 |
| Invoice #     | Shows the system generated Invoice Number.                        |
| Remaining     | Shows the amount of time remaining on a Contract.                 |
| SLA           | Includes the name of the SLA included as part of the Contract.    |
| Start Date    | Shows the commencement date of the current valid Contract.        |

## MaintContractSummaryByMonth

This template is included in system generated emails regarding the creation and update of service contracts that are automatically renewed on a monthly or quarterly basis.

| Field               | Source  |
|---------------------|---|
| Contract #          | Shows the system generated Contract Number.                       |
| Contract Type       | Specifies if the Contract is a Per Incident or Per Item Contract. |
| End Date            | Includes the date the current Contract date ends.                 |
| Interval End Date   | Shows the contract.   |
| Interval Remaining  | Shows the contract.   |
| Interval Start Date | Shows the contract.   |
| Invoice #           | Shows the system generated Invoice Number.                        |
| Remaining           | Shows the amount of time remaining on a Contract.                 |
| SLA                 | Includes the name of the SLA included as part of the Contract.    |
| Start Date          | Shows the commencement date of the current valid Contract.        |

## OutageSummary

This template is included in system generated emails related to Planned Outages.

| <b>Field</b>            | <b>Source</b>  |
|-------------------------|--|
| Outage Items            | Shows the details of Items associated with the Outage.                 |
| Outage Reason           | Displays the content of Reason field in the Outage information screen. |
| Outage Related Requests | Shows Requests related to the Outage.                                  |
| Outage Schedule         | Details the Start and End Date of the Outage.                          |

## RequestSummary

The request summary template is included in emails relating to the creation, update and closure of requests.

| <b>Field</b>           | <b>Source</b>   |
|------------------------|---|
| Classification         | Drawn from the Classification field, in the Summary tab of a request.   |
| Close Date             | Derived from the Service Terms window in the Summary Tab of a request.  |
| Country                | Derived from the Country field window in the Customer Tab of a request.   |
| Customer Name          | Derived from the Customer Field in the Summary tab of a request.  |
| Customer Phone         | Derived from the Contact Phone Field in the Summary tab of a request.   |
| Customer Room          | Derived from the Item Room Field in the Summary tab of a request.   |
| Date Style             | Detail drawn from the Admin>Setup>Privileges>Customer tab.  |
| Due Date               | Derived from the Service Terms window in the Summary Tab of a request.  |
| Email Locale           | Derived from the Customer Information details screen and defines the language used by emails sent from the system.                    |
| FSC Date               | Derived from the Service Terms window in the Summary Tab of a Change Request.   |
| Handshaking Close Days | Drawn from the Admin>Setup>Privileges>System, unless overridden by the number of days defined in the Super>User> OrgUnit>Details tab. |
| Identifier             | Derived from the Item Identifier Field in the Summary tab of a request.   |
| Item #                 | The Item Number is derived from the Item details recorded in the Customer Tab of a request.   |
| Item Type              | The Item Type is derived from the Item details recorded in the Customer Tab of a request.   |

| <b>Field</b>        | <b>Source</b>  |
|---------------------|--|
| Last Note Id        | Shows the system generated Note identification number as a hyperlink, for the Note last added to a request. When clicked by the Customer or User, defaults to the request information screen for that request inside the system. |
| Notes               | Details the number of Notes added to a request.  |
| Open Date           | Derived from the Service Terms window in the Summary Tab of a request.   |
| Org Unit            | Derived from the Org Unit field window in the Customer Tab of a request.   |
| Priority            | Derived from the Priority Details as recorded in the Summary tab of a request.   |
| Process             | Shows if the request is a Service Request, Incident, Problem or Change.  |
| Request Description | Derived from the initial Description entered for the request, as recorded in the Summary tab.  |
| Request Id          | Shows the system generated request identification number.  |
| Request URL         | Shows the system generated request identification number as a hyperlink. When clicked by the Customer or User, defaults to the request information screen for that request inside the system.                                    |
| Subject             | Derived from the Subject entered for the request that is populated from an Email Subject line or directly into the application, and recorded in the Summary tab.   |
| Team                | Shows the Team assigned to manage the request.   |
| Team Phone          | Display the Team telephone number as recorded in the Team Information screen.  |
| Technician Name     | Shows the name of the Technician assigned to the request.  |

## SurveySummary

The survey summary template is included in system generated emails regarding survey notification and reminders.

| <b>Field</b>        | <b>Source</b>   |
|---------------------|---|
| Description         | Drawn from the Survey Description Field.              |
| Name                | Displays the Name given to the Survey.                |
| Number of Questions | Shows the number of questions included on the Survey. |

## Keywords

Keywords are used by the system to identify how to handle inbound and outbound email from the system.

The following table includes a list of all Keywords that are used by the system, which can be customized, and where they appear in the application:

| Keyword        | Direction | Description   |
|----------------|-----------|---|
| Accept         | Inbound   | Accept or Yes is used to Approve Requests and must be included in the approval email.   |
| Accepted       | Outbound  | Included in Subject line for emails generated when a request has been accepted and sent to the person responsible managing the approval.            |
| AddToGroup     | Outbound  | Not Used.   |
| Article        | Outbound  | Included in the Subject line of emails sent to Customers including an Knowledge Base Articles.  |
| Author         | Outbound  | Included in content of Forum update message.  |
| AutoReply      | Outbound  | Included in the Subject line of emails for error messages.  |
| ChangeRequest  | Inbound   | Customer must include in email Subject line when updating a Change Request.<br><br>Automatically included in Subject line of Change Request emails. |
|                | Outbound  |   |
| ChatLog        | Outbound  | Used in the Subject line of emails sent to Customer with a copy of a chat transcript.   |
| Classification | Inbound   | Included in Subject line with keyword "Item" e.g. Item Classification. Cannot be used alone.  |
| Closed         | Outbound  | Included in Subject line of email responding to request, e.g. Incident Closed.  |
| Contract       | Outbound  | Used in Subject line regarding Contract activity (i.e, Contract Active or Contract Low).  |
| Created        | Outbound  | Included in Subject line of email responding to creation of a request, e.g. Request (or Invoice) Created.   |

| <b>Keyword</b> | <b>Direction</b>    | <b>Description</b>  |
|----------------|---------------------|---|
| Customer       | Outbound            | Keyword in Subject line of email regarding a Contract status, e.g. Customer Name Contract Active  |
| DeEscalated    | Outbound            | Included in Subject line of email to User regarding a request being de-escalated.   |
| Deleted        | Outbound            | Included in Subject line of email regarding a deleted request (or Invoice), e.g. Request Deleted.   |
| Delivered      | Outbound            | Included in Subject line of email regarding an Invoice, e.g. Item Delivered.  |
| Details        | Outbound            | Included in Subject line of email responding to a request, e.g. Request (or Invoice) Details.   |
| Escalated      | Outbound            | Included in Subject line of email responding to request, e.g. Request Escalated.  |
| Forum          | Outbound            | Keyword in Subject line e.g. Forum Update   |
| Group          | Outbound            | Not used  |
| Hours          | Inbound & Outbound  | Used in emails when the system refers to hours. For example, SLA and Contract emails.   |
| Incident       | Inbound<br>Outbound | Customer must include in Subject line, when updating an Incident.<br><br>Automatically included in Subject line for emails generated regarding Incidents.   |
| IncidentQueue  | Outbound            | Inserted as the technician name when a request is assigned to the request Queue and the Technician Name is configured as a parameter in the outgoing email. |
| Invoice        | Outbound            | Keyword in Subject line, e.g. Invoice Created (or Details/Deleted/Delivered).   |
| Item           | Inbound<br>Outbound | Keyword in Subject line, e.g. Item Classification.<br><br>Keyword in Subject line e.g. Item # Contract Active, or Item # Status Update                      |
| Minutes        | Inbound & Outbound  | Used in emails when the system refers to minutes. For example, SLA and Contract emails.   |

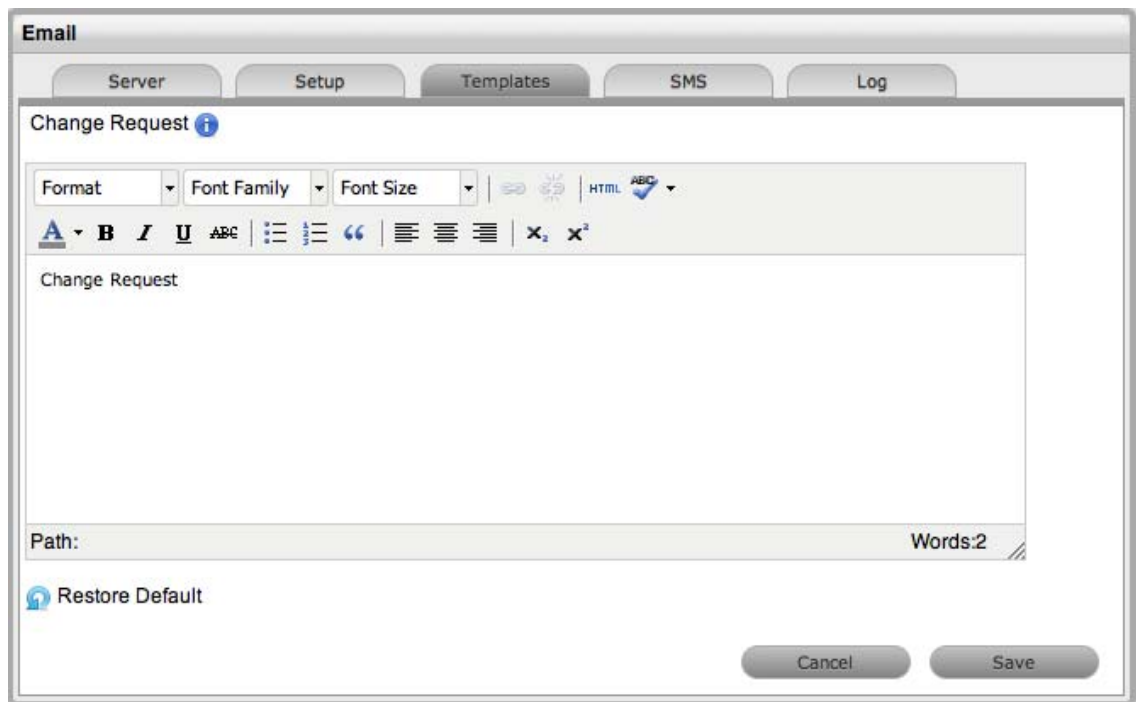
| <b>Keyword</b>  | <b>Direction</b>   | <b>Description</b>  |
|-----------------|--------------------|---|
| NewNote         | Outbound           | Included in content of email advising that a new Note has been added to a request.  |
| NewSolution     | Outbound           | Not used.   |
| No              | Inbound            | Reject or No is used to Reject Requests and must be included in the rejection email.  |
| OrgUnit         | Outbound           | Keyword in Subject line of email regarding contract status, e.g. OrgUnit Name Contract Active   |
| PlannedOutage   | Outbound           | Included in Subject line of automated email notifications about planned Item outages.   |
| Prefix          | Inbound & Outbound | Included as prefix in email subject line.   |
| Problem         | Outbound           | Automatically included in Subject line for emails generated regarding Service Requests.   |
| Reassigned      | Outbound           | Included in the Subject line of emails sent regarding reassigned requests.  |
| ReceivedMessage | Outbound           | Included in content of email replying to Customer attempting to update a request that has already been closed. (Subject line Request closed.) |
| Reject          | Inbound            | Reject or No is used to Reject Requests and must be included in the rejection email.  |
| Rejected        | Outbound           | Included in Subject line for emails generated when a request has been rejected and sent to the person responsible managing the approval.      |
| Reminder        | Outbound           | Reminding the Manager to process a Request that is waiting for approval.  |
| Resolution      | Outbound           | Included in Subject line for emails generated regarding SLA Resolution times.   |
| Resolved        | Outbound           | Included in Subject line for emails generated regarding SLA Resolution times.   |
| Response        | Outbound           | Included in Subject line for emails generated regarding SLA Response times.   |

| <b>Keyword</b>  | <b>Direction</b> | <b>Description</b>   |
|-----------------|------------------|--|
| Restoration     | Outbound         | Included in Subject line for emails generated regarding SLA Restoration times.   |
| ReviewReminder  | Outbound         | In Subject line of email reminding User to review Article,<br><br>e.g. ReviewReminder Article #  |
| Service Request | Inbound          | Customer must include in Subject line, when updating a Service Request.<br><br>Automatically included in Subject line for emails generated regarding Service Requests. |
|                 | Outbound         |  |
| SolutionCreated | Outbound         | Included in Subject line of email to Customer when a solution has been created for an open request.  |
| SolutionFound   | Outbound         | Included in Subject line of email to Customer when a solution has been found and applied to an open request.   |
| Status          | Outbound         | Included in Subject line for emails regarding , e.g. Item # Status Update  |
| SystemWarning   |                  | Outbound: Warning of unpaid invoice.   |
| Unknown         | Outbound         | Used in emails when the value of parameters selected for inclusion are not known.  |
| Unpaid          | Outbound         | Warning of unpaid invoice.   |
| Updated         | Outbound         | Included in Subject line of email, e.g. Request Updated.   |
| Yes             | Inbound          | Accept or Yes is used to Approve Requests and must be included in the approval email.  |

## **Customize Keywords**

To allow the system to recognize an alternative word for a System Keyword:

1. Select Setup>Email>Templates
2. Choose the Keywords filter view
3. Click on the relevant Name hyperlink



4. Enter the customized word
5. Click Save.

## Error Messages

Error Messages are automatically generated and sent by the system in relation to various application activities. The following table includes details for when each Error Message is used by the system:

| Message                 | Description   |
|-------------------------|---|
| ApprovalRequiredContent | The main content of an email sent to a Customer attempting to edit request, which is currently in "Approval" State. Such requests cannot be edited until approval is given.   |
| ApprovalRequiredSubject | Email Subject Line content for ApprovalRequiredContent emails.  |
| InvalidTeam             | The main content of an email sent regarding the system receiving an email including an address and name of Team that does not match. For example, email may have been intended for Change Team but used Incident Team address, or vice versa. |
| NoAccessToItemContent   | The main content of an email sent when the system receives a request via email that includes an Item# in the Subject line that the Customer does not have access.   |
| NoAccessToItemSubject   | The Subject Line of an email sent when the system receives a request via email that includes an Item# in the Subject line that the Customer does not have access.   |

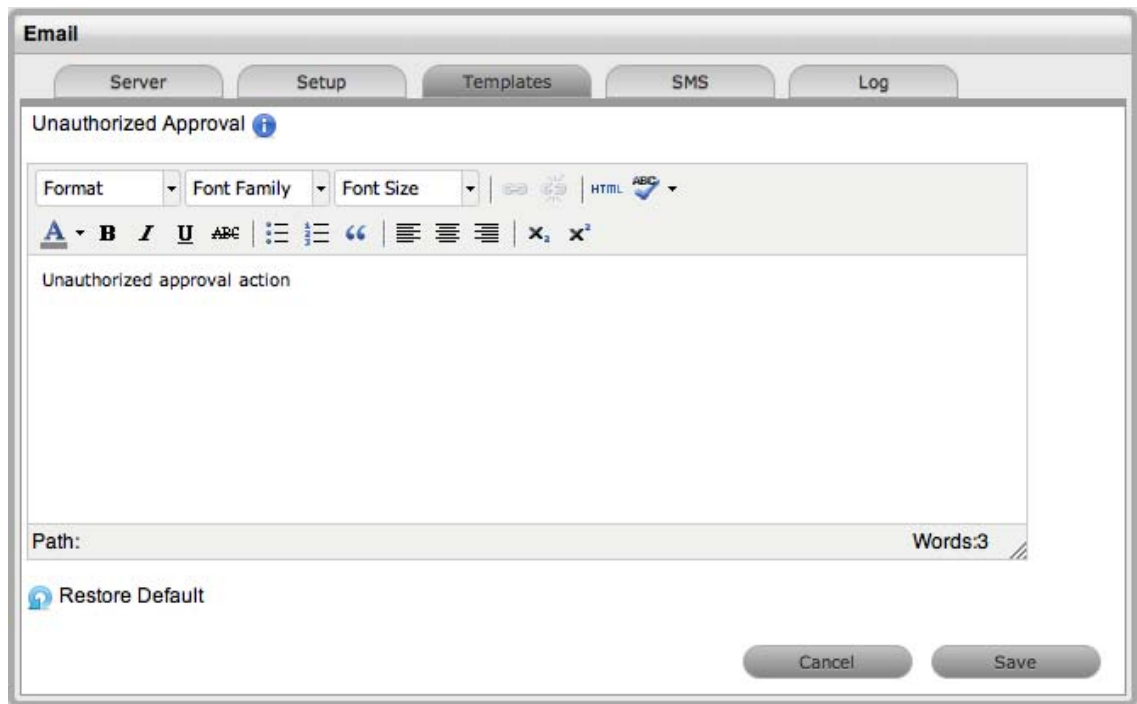


| Message                     | Description  |
|-----------------------------|--|
| NoIncidentFoundContent      | The main content of an email sent by the system when it cannot find the Incident # referred to in the email.   |
| NoIncidentFoundSubject      | Email Subject Line content for NoIncidentFoundContent emails.  |
| NoPermissionChangeContent   | The body of the email sent when a Customer tries to log a Change Request via email and the "Create Change Requests" option is disabled in the Admin>Setup>Privileges>Customer tab.   |
| NoPermissionChangeSubject   | The Subject line content included on NoPermissionChangeContent emails.   |
| NoPermissionIncidentContent | The body of the email sent when a Customer tries to log an Incident via email and the "Create Incidents" option is disabled in the Admin>Setup>Privileges>Customer tab.  |
| NoPermissionIncidentSubject | The Subject line content included on NoPermissionIncidentContent emails.   |
| NoPermissionProblemContent  | The body of the email sent when a Customer sends a request a Problem Management Team.  |
| NoPermissionProblemSubject  | The Subject line content included on NoPermissionProblemContent emails.  |
| NoPermissionRequestContent  | The body of the email sent when a Customer tries to log a Service Request via email and the Create Service Requests option is disabled in the Admin>Setup>Privileges>Customer tab.   |
| NoPermissionRequestSubject  | The Subject line content included on NoPermissionRequestContent emails.  |
| NoServiceIncidentContent    | The content of the email sent when a Customer tries to log an Incident for a Service by including the Item# in the Subject line of their email addressed to the Incident Team, and the "Service Incident" option is disabled in the Admin>Setup>Privileges>Customer tab.                         |
| NoTeamFound                 | The main content of an email sent by the system when it receives an email sent a Team email address that is not in the system.   |
| NoUserFound                 | The Subject Line included on the NoAccount emails.<br><br><b>NOTE:</b> The content for emails sent by the system when it receives emails from addresses that do not exist in the system, i.e., NoAccount email, can be configured in the Full Email Templates filter of the Email>Templates tab. |
| RequestCreationErrorContent | The system generated email sent when an error occurs during the creation of request. An example of an error would be if the database becomes unavailable during the request creation process.  |

| Message                     | Description   |
|-----------------------------|---|
| RequestCreationErrorSubject | The Subject line content included on the RequestCreationErrorContent email.   |
| UnauthorizedApprove         | The email sent when a Manager sends email attempting to approve change but does not have approval permission enabled.                           |
| UnrecognizedAction          | The email sent when a Manager sends an email attempting to accept or reject a Change but does not use the keywords YES or ACCEPT, NO or REJECT. |

To edit a Message:

1. Click on the required message name link



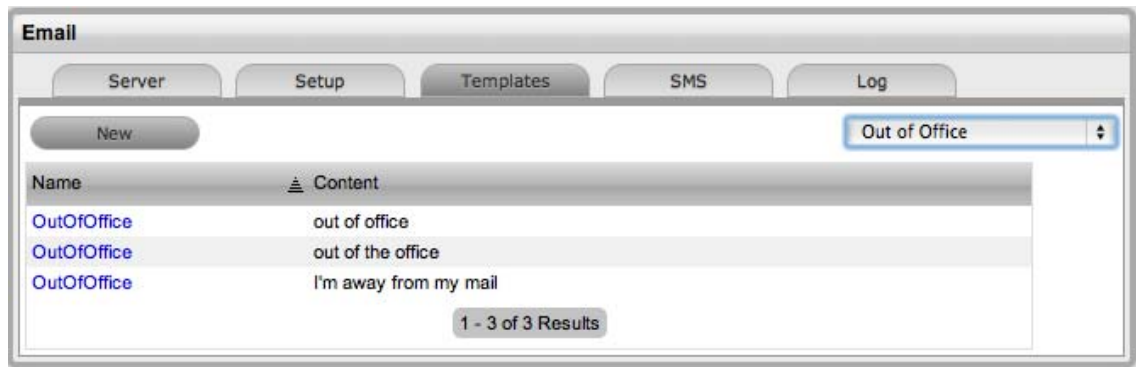
2. Update the message content
3. Click Save.

## Out of Office

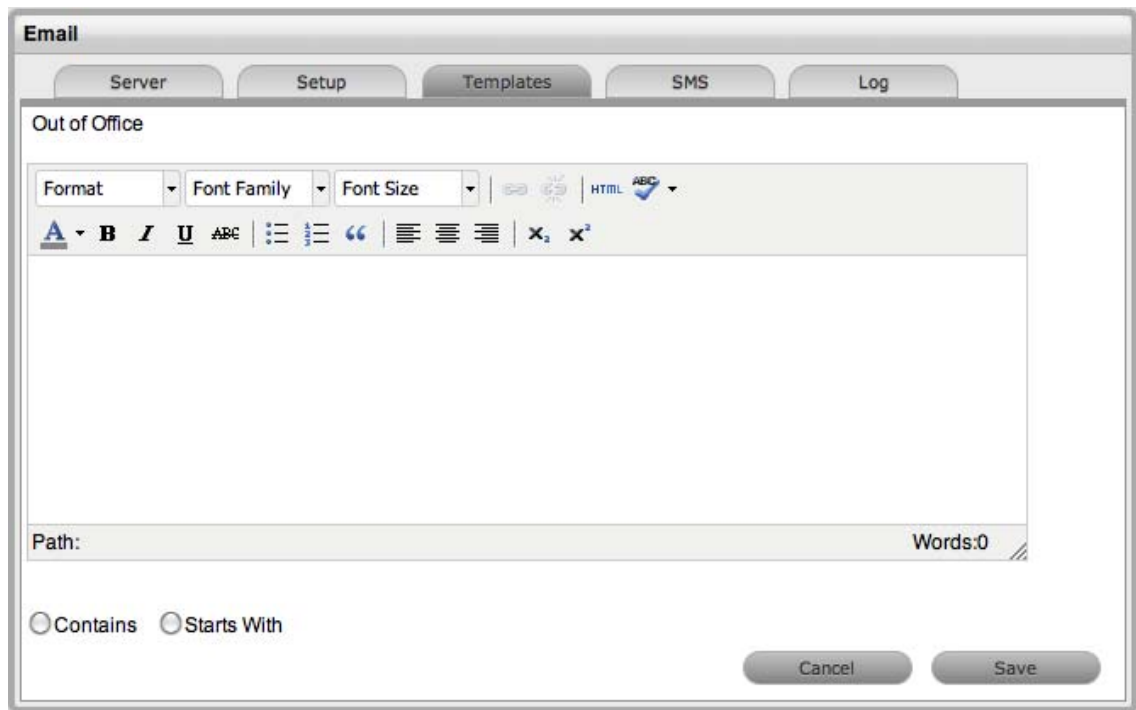
Users can customize multiple Out of Office options within the application, which allows the system to identify incoming email Subject lines with this message in different languages. The system will ignore emails with this content in the Subject line of emails.

To add or edit out of office messages as an Administrator:

1. Go to the Setup tab
2. Move to the Email>Templates tab



3. Select the Out of Office option
4. Click New or select the relevant message link
5. Add or amend the Subject line content that is to be identified by the system



6. Click Save.

## SMS Templates

The templated text and parameters for SMS messages sent from the system regarding requests and Item outages are configured within the SMS Templates filter screen of the Templates tab.

Template can be customized for the following messages sent from by the system:

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### SMS Templates

ApproveChangeSMS

Message sent to Managers when an RFC moves to an Approval State.

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**SMS Templates**

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|                                  |   |
|----------------------------------|---|
| ApproveServiceRequestSMS         | Message sent to Managers when a Service Request moves into an Approval State.   |
| ClosedRequestSMS                 | Included at the beginning of the email when a request is closed.  |
| ClosedTimeoutSMS                 | Used by the handshake facility and prefaces emails sent as Incident Note using the Propose button.  |
| CloseRequestLinkSMS              | Message sent with the hyperlink to enable Customers to keep a request open after a possible solution has been sent to them. If the Customer clicks on the link, the automated close process is deactivated. |
| CloseRequestSMS                  | Message sent when the handshaking facility is applied and the Technician proposes a Solution to the Customer.   |
| CreateRequestSMS                 | Message sent to a Customer when a request is created.   |
| DeleteRequestSMS                 | SMS sent to a User when a request is deleted.   |
| GroupCreateSMS                   | SMS sent to a User when a request group has been created in the system.   |
| InvoicePrefixSMS                 | Message sent to a Customer with a newly created Invoice.  |
| ItemStatusChangeSMS              | SMS sent to a Customer when an Item Status is changed.  |
| NewAttachmentToTechSMS           | SMS sent to a Technician when a Customer uploads an attachment to a request in the Customer Portal.   |
| NoteClosedPrefixSMS              | SMS sent to when a new Note is added to a closed request.   |
| NoteClosedSMS                    | Sent to a Customer when they have attempted to a Note to a request that is already closed.  |
| NotePrefixSMS                    | Sent each time a new Note is associated with an existing request.   |
| PlannedOutageSMS                 | Included in the SMS sent when an Item is scheduled to be taken offline.   |
| RequestDeescalateFromToSMS       | Message sent when a request is manually de-escalated this message is sent to the newly assigned Technician.   |
| RequestDeescalateNotAvailableSMS | Message sent when a request is manually de-escalated this message is sent to the previously assigned Technician to let them know that the request is no longer available for them to work on.               |
| RequestEscalateFromToSMS         | Message sent when a request is manually escalated this message is sent to the newly assigned Technician.  |

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## SMS Templates

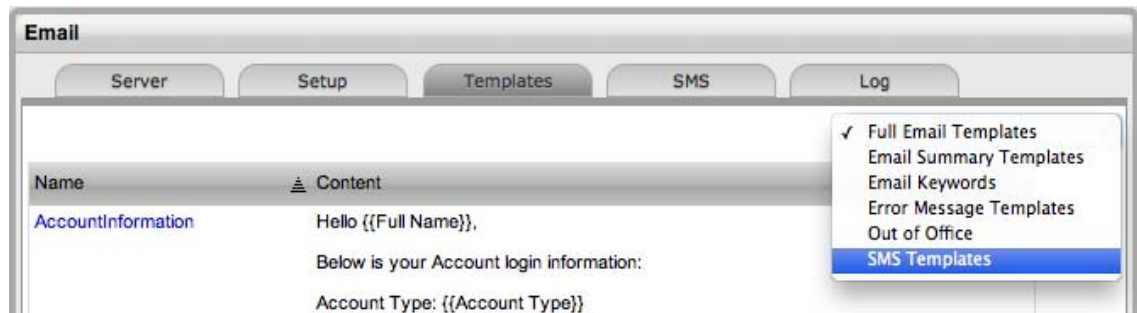
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|                            |  |
|----------------------------|--|
| RequestEscalateNot         | Message sent when a request is manually escalated this message is sent to the previously assigned Technician to let them know that the request is no longer available for them to work on. |
| AvailableSMS               |  |
| RequestReassignedManager   | This message is sent when the Manager responsible for processing the approval of a request is changed and is sent to the previously assigned Manager.                                      |
| PrefixSMS                  |  |
| RequestReassignedManager   | The message included in an email when a request moves from a Manager Approval State to the newly assigned Technician User.   |
| ToTechPrefixSMS            |  |
| RequestReassignPrefixSMS   | When a request is reassigned this message is sent with the request details to the previously assigned User.  |
| RequestReassignToPrefixSMS | When a request is reassigned this message is sent with the request details to the newly assigned User.   |
| RequestStatusChanged       | The content of an email sent when the Status of a request is moved from Pending-No Contract to the default open state of the assigned Workflow. This is sent to the assigned Technician.   |
| PrefixSMS                  |  |

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To customize an SMS message template:

1. Select Setup > Email > Templates
2. Move to the SMS Templates filter



3. Select the Message Name hyperlink
- The HTML editor appears.
- 4.

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| Icon | Description   |
|------|---|
|      | The drop-down list options provides specific details to be included on the SMS message. |
|      | Restores the system default SMS message.  |

---

5. Modify the message as required

As part of the customization, the Administrator can use the existing parameters included in the Insert Parameter drop down list. Using these options ensures the customized message use the correct format for the details regarding this information.

6. Click Save.

## SMS Parameters

Parameters for new and updated Request templates:

| Parameter   | Source  |
|-------------|---|
| Process     | Shows if the request is a Service Request, Incident, Problem or Change. |
| New Status  | Shows the Workflow State assigned to the request.                       |
| Request Id  | Shows the system generated request identification number.               |
| Request URL | A direct link to the request.   |

Parameters for the Group templates:

| Parameter  | Source   |
|------------|--|
| Group #    | Shows the Group ID number.   |
| Group URL  | A direct link to the request Group.  |
| Group Type | Identifies the Group as Service Request, Incident, Problem or Change requests. |

Parameters for the Invoice template:

| Parameter   | Source                        |
|-------------|-------------------------------|
| Invoice #   | Shows the Invoice number.     |
| Invoice URL | A direct link to the invoice. |

Parameters for the Item Status Change templates:

| Parameter   | Source  |
|-------------|---|
| Item Number | Shows the Item Number as recorded in the Item Information tab.        |
| Status      | Shows the Status of the Item as recorded in the Item Information tab. |

Parameter for the New Attachment template:

| Parameter | Source   |
|-----------|--|
| File Name | Allows the file name of the newly received attachment to be included in the email to the User. |

Parameters for the Planned Outage templates:

| Parameter         | Source   |
|-------------------|--|
| Outage End Date   | Drawn from the End Date field in the Configuration>Planned Outages screen.                   |
| Outage Items      | Shows the Items associated with the Planned Outage in the Configuration>Planned Outages tab. |
| Outage Start Date | Drawn from the Start Date field in the Configuration>Planned Outages screen.                 |

Parameters for the Escalation templates:

| Parameter           | Source   |
|---------------------|--|
| Current Technician  | Shows the name of the newly assigned Technician.   |
| Previous Technician | Shows the name of the Technician who was previously assigned the request.                  |
| Process             | Shows the ITIL Process of the request, i.e., Change, Incident, Problem or Service Request. |
| Request ID          | Shows the Request identification number.   |

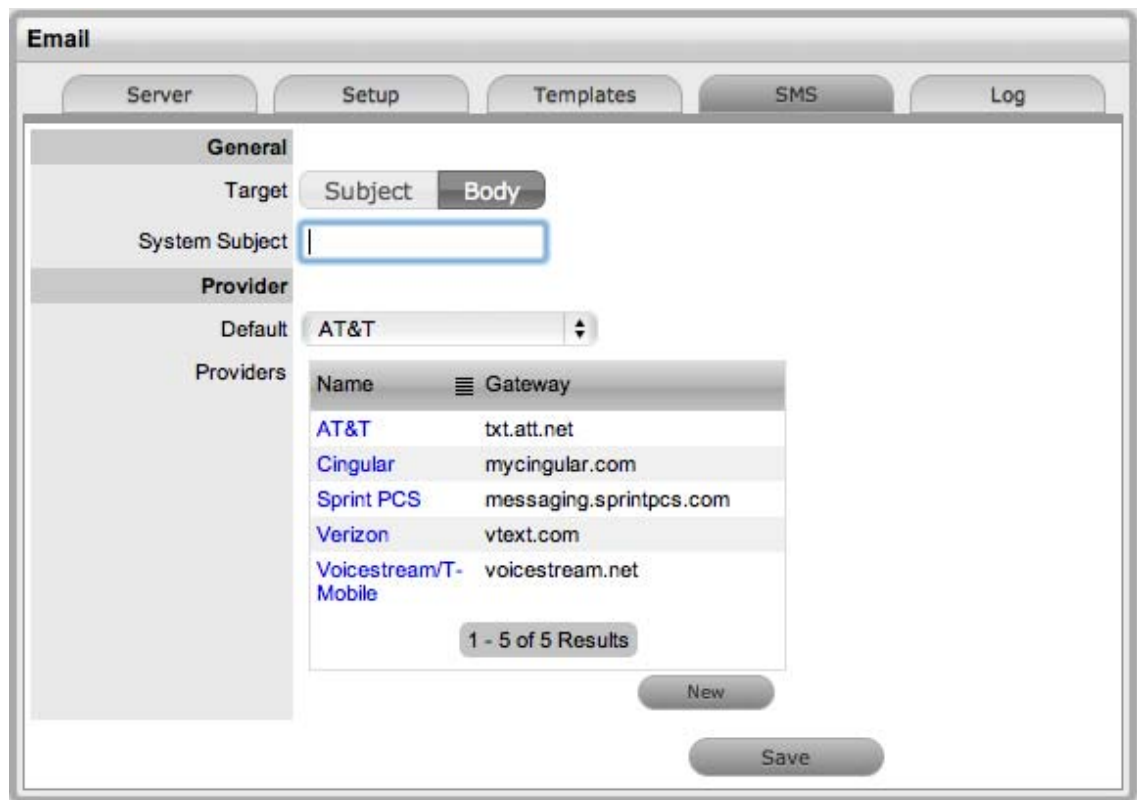
## 5.2.4 SMS

The details of the SMS service providers that are to be applied within Customer and User account information screens, are configured within the SMS tab of the Setup>Email sub-menu option. Within this screen, the default Customer Service Provider is defined and automatically applied to Customer account information when SMS notification is selected as the preferred method of notification by the Customer or User.

The SMS functionality allows a subject line to be specified for providers that require a security token or account number in the subject line, with the message to be sent in the body. On install, the default setting is set to Subject, not requiring an account number or security token as the provider only requires email server information. This can be customized to meet the provider's requirements.

To configure the SMS setting:

1. Select Setup >Email > SMS



2. Set the Target location for sent message:

- ◆ *Subject*: this is selected when the system is to include the message content in the email Subject Field, as the service provider only needs to know the email server details.
- ◆ *Body*: this is selected when the system is to include the message content in the email Body, allowing a System Subject to be configured as required by the service provider, with content such as an account number or security token.

To edit the details of default entries:

1. Select the hyperlink of the relevant service provider
2. Amend details
3. Click Save.

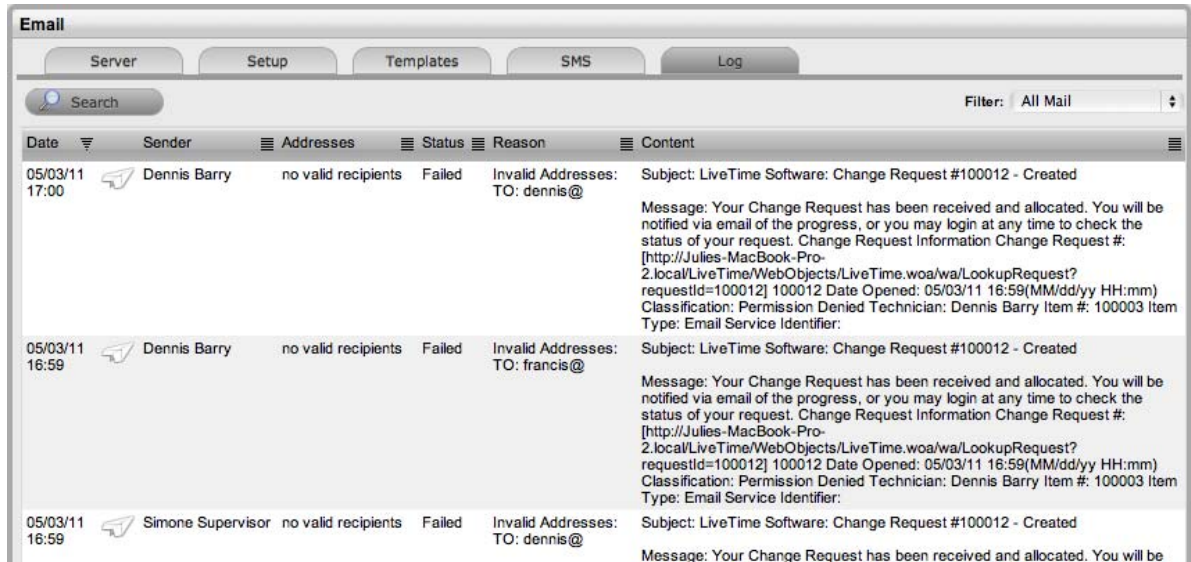
To add a service provider:

1. Click New
2. Enter the Name and Gateway details
3. Select Save
4. Set the Default Customer Service Provider from the drop-down list options
5. Click Save.



## 5.2.5 Email Log

The Email Log facility allows an Administrator to access a complete list of email activity that occurs within the service management application. This enables an Administrator to determine whether an email is successfully sent or if it has failed. If an email fails to send, the system provides an explanation for the failure.



The Email Log screen has the following filter views:

| Filter              | Description   |
|---------------------|---|
| All Mail            | Displays all email activity.  |
| Inbound Mail        | Lists the emails that have been sent to the system.   |
| Inbound Mail Errors | List the emails received by the system mailbox in error (i.e., from email addresses with no account.) |
| Outbound Mail       | Lists the emails that are sent from the application by Users.   |
| Outbound Sys Mail   | Lists the emails that are automatically sent by the system e.g. Escalations, SLA breaches.            |

**NOTE:** Automatic system maintenance deletes 14 day old Email Log entries.

### Search Email Activity

Administrators can conduct searches on inbound and outbound emails recorded in the system Email log.

To search for an email as an Administrator:

1. Go to the Setup>Email>Log tab
2. Select the Search button
3. Define:

4.

---

**Option**

---

|            |   |
|------------|---|
| Start Date | Enter the earliest relevant date for the system to include in the search.   |
| End Date   | Enter the latest relevant date for the system to include in the search.   |
| Direction  | Define if the search is to include either inbound or outgoing email.  |
| Status     | Define the email status option to be searched: <ul style="list-style-type: none"><li>◆ Sent email</li><li>◆ Failed to send email</li><li>◆ Email set a Pending status</li><li>◆ Email Sent with Errors.</li></ul> |

---

5. Click Search.

## 5.3 Custom Fields

The Custom Fields function allows screens in the system to be adapted to meet specific requirements of an organization, as additional fields can be created for different parts of the application.

Custom fields can be set for different system screens and include the option to select:

- ◆ Data type
- ◆ Style
- ◆ Defining if the field is required or includes a description
- ◆ Determining whether it can be viewed or edited by the Customer (Incident, Change and Service Request Custom fields only.)

---

**NOTE:** A maximum of 5 fields is allowed for each option.

---

### 5.3.1 Enabling a Custom Field

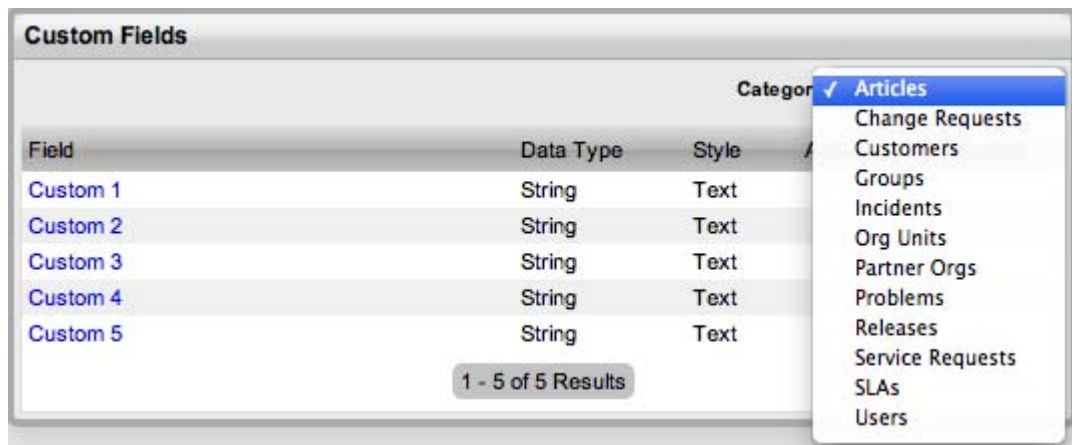
To enable a Custom Field:

1. Select Setup>Custom Fields

The Custom Fields screen appears.

2. From the Category Filter drop-down list select the screen option

The displayed list includes all screens where custom fields can be added.



| Custom Fields     | Custom Field Locations  |
|-------------------|---|
| Articles          | Additional field for Articles in the Knowledge Base.  |
| Change Requests   | Additional field for a Change Request.  |
| Customers         | Additional field for Customer Information.  |
| Groups            | Additional field for Service Request, Incident, Problem and Change Groups.  |
| Incidents         | Additional field for Incident Information.  |
| Invoices          | Additional field for Invoices. (Option visible when Billing>Invoices have been enabled for the system.)                                       |
| Org Units         | Additional field for an Organizational Unit.  |
| Partner Orgs      | Additional field for Partner Organization.  |
| LDAP/ADS Accounts | Customized LDAP/ADS fields can be used to map to a Directory Server when importing user account details. See <a href="#">Authentication</a> . |
| Problems          | Additional field for Problem details.   |
| Releases          | Additional field for Release Management details.  |
| Service Requests  | Additional field for Service Request information.   |
| SLAs              | Additional fields for Service Level Agreement Information screen.   |
| Users             | Additional field for the Users Information screen.  |
| Purchase          | Additional field for Purchase Orders. (Option visible when Billing>Purchase Orders have been enabled for the system.)                         |

**NOTE:** Problem, Change, Release and Service Requests are in Service Manager only

1. To define a custom field, click on the appropriate field label hyperlink  
An editable window appears.

**Custom Fields**

**Custom Field**

Field Label  i

Category Customer

Active  Yes  No

2. Toggle the Active field to Yes  
Once activated, a list of options is displayed.

**Custom Fields**

**Custom Field**

Field Label  i

Category Customer

Active  Yes  No

Required  Yes  No

Customer Visible  Yes  No

Data Type  ↕

Style  Text  List

Unique Value

Default Value

Input Validation  Yes  No

Enable Description  Yes  No

| Options     | Description   |
|-------------|---|
| Field Label | Edit the Field Label by entering the relevant name. (Required.)<br><br><b>NOTE:</b> The label entered within this field is applied to the English UI. For it to appear in another language, configure this label in the Setup>Localization>Content tab. |
| Active      | Defines the Custom Field visibility.  |
| Required    | Defines if the field is mandatory when displayed.   |

| Options            | Description  |
|--------------------|--|
| Data Type          | <p>The format required for the field.</p> <p>Select the data type from the following:</p> <ul style="list-style-type: none"> <li>◆ String (Text or List)</li> <li>◆ Number-Custom Field that requires a number</li> <li>◆ Boolean (Radio Buttons)</li> <li>◆ Date-Custom Field that requires a value in a date format</li> <li>◆ Currency- A currency can be defined for the Field</li> <li>◆ Hyperlink - A URL can be included in the field.</li> </ul> |
| Style              | <p>From the options provided, the way the data type will be displayed.</p> <ul style="list-style-type: none"> <li>◆ String custom field - either an open text field or a list, or</li> <li>◆ Boolean custom field - uses radio buttons to define Yes/No or True/False.</li> </ul>  |
| Unique Value       | <p>When active, the system prevents the duplication of data within the customized field.</p>   |
| Input Validation   | <p>When enabled the Input Mask and User Mask can be defined.</p> <p><i>Input Mask</i>: A regular expression to use for data validation of values entered by a User (i.e., Zip/Post Code, telephone no.)</p> <p><i>User Mask</i>: A User Friendly representation of the Input Mask that Customers can understand should it appear in a validation error message.</p>  |
| Enable Description | <p>When enabled, a Description field appears that allows the User to enter details of what information the field is expected to capture. These details are accessible next to the custom field on the relevant screen.</p>   |

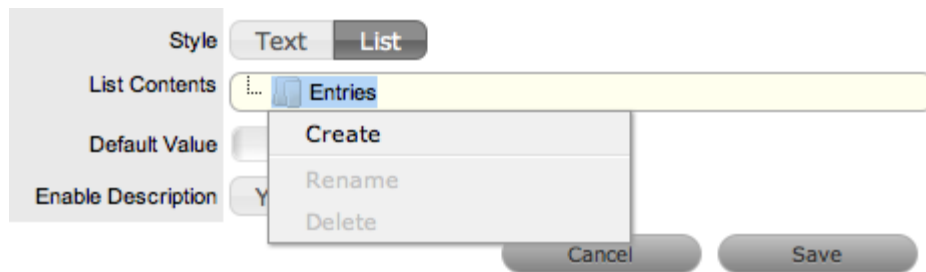
### 5.3.2 Data Type - List

When the Data Type String - List is selected the List Contents field is displayed, which provides the facility to create a drop down list to be created as options within the field.

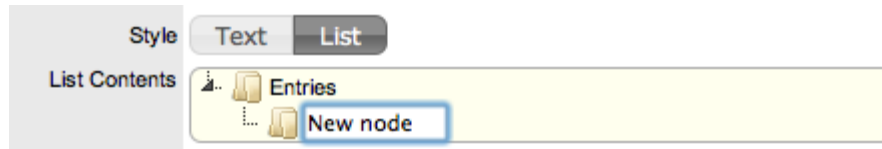
To create a new list entry within the List Contents field:

1. Right click the Entries link

The Create option is displayed



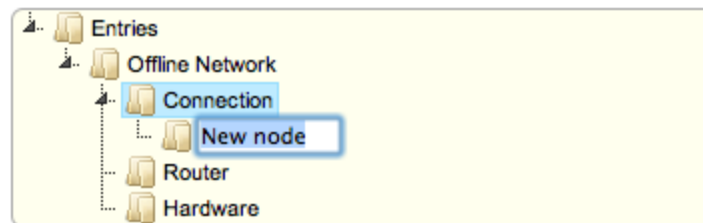
2. Click Create  
A New node link displayed



3. Enter the name of the field
4. Click outside the field to save the entry



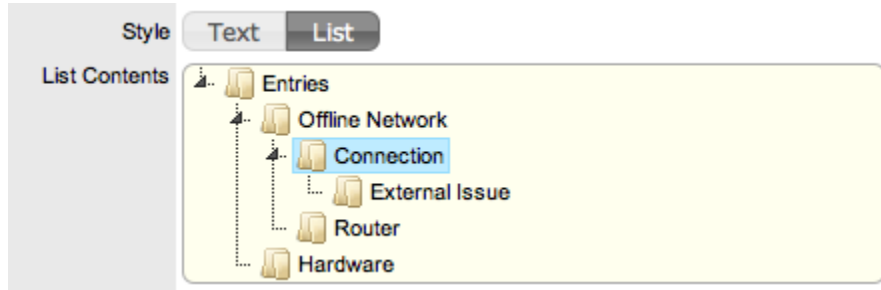
5. Repeat this process until all list entries have been added  
To create a nested list, right click on the relevant list entry and repeat the above process.



6. To move an existing entry to a new position, select the entry, then drag and drop the entry into its new location



7. When all the relevant details have been defined for the custom field, click Save.



### 5.3.3 Custom Fields for Incidents, Change and Service Requests

If a custom field is enabled for an Incident, Change or Service Request, additional options are displayed. These include:

|                   | Description  |
|-------------------|--|
| Customer Visible  | The custom field is visible in the Customer Portal, otherwise it can only be viewed via Technician access.   |
| Customer Editable | Allows the Customer to edit the content within this field.   |
| Default Value     | The custom field will automatically be populated with the value entered here when a request is created. This value can be edited within the request screen, if required. |

**Custom Fields**

**Custom Field**

Field Label  i

Category Incident

Active  Yes  No

Required  Yes  No

Customer Visible  Yes  No

Customer Editable  Yes  No

Data Type  ▾

Style  Text  List

Unique Value

Default Value

Input Validation  Yes  No

Enable Description  Yes  No

Description

Custom Field description text can be used to detail they type of information to be recorded in the field. This may also include other useful data that could benefit the Users and Customers.

Cancel Save

---

**NOTE:** If Customer Visibility is set to No for a required field, then a Default Value must be defined. This will enable the Customer to save a new request without seeing the relevant field.

---

### 5.3.4 LDAP/ADS Accounts Custom Fields

The LDAP/ADS custom fields are used to define specific Customer and User fields configured within LDAP/ADS. The custom fields for Customers and Users are completed when Users and Customers are entered manually or imported using a .CSV file.

If Mixed Mode LDAP is applied, the same set of custom fields are used. These are listed with the label Mixed Mode within the Custom Field Category filter list.



## 5.4 Privileges

### 5.4.1 Privileges

The Privileges tab contains global setup options that govern the application behavior, how Customers and Users can interact with the system and define system defaults.

Ideally, Privileges are set upon initial configuration, however, the system will adapt to changes made later.

There are four tabs within Privileges:

- ◆ [User](#)
- ◆ [Customer](#)
- ◆ [Requests](#)
- ◆ [System](#).

### 5.4.2 User Privileges

Within the User tab, privileges for Users with the Technician and Partner Role can be configured by customizing the options within the Technicians options list. This also includes enabling functionality related to all User work hours and public holidays. Defaults can also be adjusted for Users across the Knowledge Management and Configuration Management processes.

Specific to Technician Users, the following privileges include the ability to:

- ◆ Create new Customers
- ◆ Create new Items
- ◆ Reassign requests
- ◆ Edit other Technicians' requests
- ◆ Create, edit, publish and delete Knowledge Base Articles by default.

---

**NOTE:** Privileges assigned to the Technician Role are also applied to the [Partner Role](#).

---

### Enabling User Privileges

To configure User Privileges:

1. Select Setup>Privileges

The User tab is displayed.

**Privileges**

User    Customer    Requests    System

---

**Technicians**

|                         |                                     |                                     |  |  |  |
|-------------------------|-------------------------------------|-------------------------------------|--|--|--|
| Create Customers        | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |  |  |  |
| Reassign Requests       | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |  |  |  |
| Duplicate Requests      | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |  |  |  |
| View All Requests       | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |  |  |  |
| Update Closed Requests  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |  |  |  |
| Search All Items        | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |  |  |  |
| Include Globals Default | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |  |  |  |
| Subject Required        | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |  |  |  |
| Technician Alerts       | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |  |  |  |
| Define Work Hours       | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |  |  |  |
| Assignment Control      | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |  |  |  |
| Scheduled Vacations     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |  |  |  |
| Observe Public Holidays | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |  |  |  |
| Edit Customer Partner   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |  |  |  |
| Create Outage           | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |  |  |  |
| Force Analysis          | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |  |  |  |

**Configuration**

|             |                                       |                                     |                                       |  |  |
|-------------|---------------------------------------|-------------------------------------|---------------------------------------|--|--|
| Supervisors | <input type="button" value="Create"/> | <input type="button" value="Edit"/> | <input type="button" value="Delete"/> |  |  |
| Technicians | <input type="button" value="Create"/> | <input type="button" value="Edit"/> | <input type="button" value="Delete"/> |  |  |
| Partners    | <input type="button" value="Create"/> | <input type="button" value="Edit"/> | <input type="button" value="Delete"/> |  |  |
| Finances    | <input type="button" value="Create"/> | <input type="button" value="Edit"/> | <input type="button" value="Delete"/> |  |  |

**Knowledge**

|             |                                       |                                     |                                       |  |  |
|-------------|---------------------------------------|-------------------------------------|---------------------------------------|--|--|
| Supervisors | <input type="button" value="Create"/> | <input type="button" value="Edit"/> | <input type="button" value="Delete"/> | <input type="button" value="Publish"/> |  |
| Technicians | <input type="button" value="Create"/> | <input type="button" value="Edit"/> | <input type="button" value="Delete"/> | <input type="button" value="Publish"/> |  |
| Partners    | <input type="button" value="Create"/> | <input type="button" value="Edit"/> | <input type="button" value="Delete"/> | <input type="button" value="Publish"/> |  |
| Managers    | <input type="button" value="Create"/> | <input type="button" value="Edit"/> | <input type="button" value="Delete"/> | <input type="button" value="Publish"/> |  |

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**User Privileges**

---

Technicians

Create Customers

Allows Technicians to create Customer Accounts.

---

---

## User Privileges

---

|                         |  |
|-------------------------|--|
| Reassign Requests       | Allows Technicians to reassign requests to another Technician within the same Team. When disabled, requests can only be reassigned through Escalation or changing the status of the request by the Supervisor.   |
| Duplicate Requests      | Allows Technicians to copy requests to fast track request creation. Supervisors have this privilege by default.  |
| Manual Request Time     | Disables the timer that automatically monitors and records the time when a request is in Edit Mode.<br><br><b>NOTE:</b> This option is not available when Contracts are enabled in the Setup>Billing tab, as time worked on a request must be added to Notes manually by Users.  |
| View All Requests       | Allows Technicians to view all the requests, regardless of Team assignment, logged in the system for the Processes they are assigned.<br><br>It also allows Technicians to edit requests that are assigned to fellow Team members.   |
| Update Closed Requests  | Set to Yes to enable Technicians to add Notes to requests that are assigned a Workflow Exit State.   |
| Search All Items        | Within the Items tab of a request, the All Items option is displayed in the Find Item box for Technician Users, if this option is enabled.   |
| Include Globals Default | By enabling this option, the "Include Global* Options" is ticked by default in the Find Item field, when a User is creating a request.   |
| Subject Required        | To make the completion of the Subject field mandatory for Users during the request creation process, set the option to Yes.  |
| Technician Alerts       | Allows Technicians to create system Alerts.  |
| Define Work Hours       | Allows the Technician's availability to be configured within the Users>Schedule tab. This ensures that Requests are only forwarded to the User during the Defined Work hours, unless there are no other Users available.<br><br>*If this option is enabled, the Users Work Hours must be defined for each User, otherwise the built-in technician assignment logic will be ignored and all new requests will be assigned to the Team Lead. |
| Assignment Control      | When enabled provides the Assignment option within the User Information screen. This allows a Supervisor or Administrator to turn request assignment off for a User who is available in the system.  |

---

---

## User Privileges

---

|                         |  |
|-------------------------|--|
| Scheduled Vacations     | Allows leave to be scheduled for Users, within the Users>Schedule tab. This allows vacations to be planned and automatically detected by the System when the User commences leave. The System will not assign the User new Requests when they are on vacation. |
| Vacation Reassign       | This option becomes available when the 'Schedule Vacations' option is active. When enabled, this option ensures active requests of the User commencing leave are automatically re-assigned to available Technicians within the User's Team.                    |
| Observe Public Holidays | This option ensures the System gives consideration to public holidays when calculating SLA times, escalations and breaches.<br><br><b>NOTE:</b> When enabled, the Public Holidays sub-menu option is visible within the Admin>Localization>Holidays tab.       |
| Edit Customer Partner   | Allows Customers to be assigned to Partners within the Customer Information tab.   |
| Create Outage           | Enables a Technician to create outages for Items.  |
| Force Analysis          | The system will propose relevant Solutions within the Analysis tab, during the request creation process.   |
| Configuration           |  |
| Roles                   | Set the default privileges for the User Roles' ability to create, edit and delete Item information in the CMDB.  |
| Knowledge               |  |
| Roles                   | Configure the default Knowledge Base authoring permissions for each User Role.   |

---

2. Click Yes to enable, or No to disable a Privilege option
3. Click Save.

### 5.4.3 Customer Privileges

Customer Privileges specify the options that are available to Customers within the Customer Portal.

#### Enabling Customer Privileges

To enable Customer Privileges:

1. Select Setup>Privileges>Customer

The Privileges screen is displayed.

**Privileges**

User Customer Requests System

**Customers**

Create Account  Yes  No

Default Web Access  Yes  No

Incidents  ▾

Change Requests  ▾

Service Requests  ▾

Service Incidents  Yes  No

Items  ▾

Show Only Active Items  Yes  No

Show Subject Field  Yes  No

Show Priority  Priority  Urgency  Off

Item ID Search  Yes  No

Force Search  Yes  No

Create Forum Topics  Yes  No

Display Room  Yes  No

View Technician  Yes  No

Show All Services  Yes  No

Show Service Targets  Yes  No

Enable RSS  Yes  No

Enable Titles  Yes  No

Enable Item Shadow  Yes  No

Customer Defined Contact  Yes  No

Record GPS  Yes  No

Default Date Style  ▾

Default Timezone  ▾

**View Shared Requests**

By Ownership  Yes  Limited  No

Save

**Customer Privileges**

**Description**

Create Account

Allows Customers to create their own account from the Login screen.

| <b>Customer Privileges</b> | <b>Description</b>   |
|----------------------------|--|
| Default Web Access         | Define the default setting for Web Access on newly created Customer Accounts.  |
| Incidents                  | Define if Customers can view, create or edit Incidents in the Customer Portal.   |
| Change Requests            | Define if Customers can view, create or edit Change Requests in the Customer Portal.   |
| Service Requests           | Define if Customers can view, create or edit Service Requests in the Customer Portal.  |
| Service Incidents          | <p>If the option to create Incidents in the Customer Portal is enabled, this can be refined by defining if Incidents can be logged against Service Items. If this option is disabled then Services are not displayed in the Category drop-down list during the Incident creation process.</p> <p>Also, if a Customer attempts to log an Incident against a Service via email by including the Item# in the Subject line, and this option is disabled, the system will send an error message. The "NoServiceIncidentContent" error message can be customized in the Admin&gt;Setup&gt;Email&gt;Templates&gt;Error Message filter.</p> |
| Items                      | Define if Customers can view, create or edit their own Item details within the Customer Portal.  |
| Show Only Active Items     | Allows Customers to only view Items that are marked as Active in the system.   |
| Show Subject Field         | Displays the Subject field above the Description field in the Customer Portal.   |
| Show Priority              | Enables Customers to view and set the Priority of their requests. Alternatively, the Urgency can be shown, which will be associated with the Item Criticality to set the Priority. Select "Off" to disable this functionality completely.  |
| Item ID search             | Allows Customers to search by an Item's ID when creating a new request.  |
| Force Search               | When enabled, proposes solutions for Incidents based on the Item Type, Classification and Description provided.  |
| Create Forum Topics        | Allows Customers to create a new Forum topic through the Customer Portal.  |
| Display Room               | Displays the Room for an Item when creating a request.   |
| View Technician            | Yes allows Customers to view the details of Technician assigned to their request in the Customer Portal.   |

| <b>Customer Privileges</b> | <b>Description</b>  |
|----------------------------|---|
| Show All Services          | Enables the Service Catalog link in the Services tab of the Customer Portal. This allows Customers to view and log requests against all Services offered by the support organization (i.e., request access to a service). Services listed here are not assigned an Exit Item Lifecycle State. |
| Show Service Targets       | Displays the Response, Restoration and Resolution targets for the SLA assigned to the request in the Customer Portal.   |
| Enable RSS                 | When enabled, provides the RSS Requests Menu option in the Customer Portal.   |
| Enable Titles              | When enabled, displays the Titles Tab within the Setup, which can be customized. This list is then displayed in the Title field in the User and Customer Information screen. See <a href="#">Titles</a> .   |
| Enable Item Shadow         | When enabled, if requests are logged against an Item on the Customer Portal, Technicians can amend the Item assigned to the request without the Customer seeing the change.   |
| Customer Defined Contact   | When enabled, this option allows the Customer to define their preferred method of contact in their Profile or My Account screen. Their preference applies when a Team has the Customer Notification option set to Customer Defined.   |
| Record GPS                 | When enabled, the Customer's GPS location when they last logged into the Customer Portal, is recorded within their Customer Information screen.   |
| Default Date Style         | Sets the default Date format to be used across the application.   |
| Default Timezone           | Sets the default time zone across the application. This can be overridden on a per User basis, by a User who sets their time zone for their log in account  |
| LDAP/AD                    | (Visible when an LDAP/AD connection is configured.)   |
| Include Customers          | Set to Yes if the system is to import Customer details when synched with an LDAP/AD server.   |
| Mixed Mode                 | Allows Customer accounts to be created directly through the system, as well as being imported via LDAP/AD.  |
| View Shared Requests       | (Request visibility options for the Customer Portal.)   |
| By Ownership               | Allows requests to be viewed by all Owners of the Item, when logged against a Shared or Global Item.<br><br>(See the table below for toggle option outcomes.)   |

| Customer Privileges | Description   |
|---------------------|---|
| By Org Unit         | (This option is visible when the By Ownership is enabled.)<br><br>Allows requests to be viewed by all Customers of an Org Unit assigned to the Item, when logged against a Shared or Global Item. |

2. Click Yes to enable, or No to disable a Privilege option
3. Click Save.

## Setting the View Shared Requests options

When setting the visibility of requests logged against shared Items, refer to the table below to ensure the correct visibility option is configured for your organizational requirements:

| By Ownership | By Org Unit | Shared Request Visibility   |
|--------------|-------------|---|
| No           |             | Only visible to the Customer who logged the request.  |
| Limited      | No          | Visible to the Customer who logged the request and other Owners in the same Org Unit, assigned to the Item.   |
| Limited      | Limited     | Visible to Customer who logged the request and members of Org Unit they belong to, if the Org Unit is also assigned to the Item.                              |
| Limited      | Yes         | Requests visible to Owners within all Org Units assigned to the Item.   |
| Yes          | No          | Visible to Customer who logged the request and other assigned Owners.   |
| Yes          | Limited     | Visible to Customer who logged the request, other members of the Org Unit the Customer logging the request belongs to and other Owners assigned to the Item . |
| Yes          | Yes         | Visible to everyone who share the Item assigned to the request.   |

### 5.4.4 Requests Privileges

Requests Privileges allows the Administrator to control the functionality available for requests and set default requirements. These privileges are applied system-wide.

#### Enabling Requests Privileges

To enable Requests Privileges:

1. Select Setup>Privileges>Requests



The Requests Screen appears.

**Privileges**

User Customer **Requests** System

**Requests**

Enable Escalation Control  Yes  No

Queues  On  Off

Control Deployments via RFC  On  Off

Control CMS via RFC  Yes  No

Customer CMS via RFC  Yes  No

Minimum Solution Relevance  %

Enable Quick Calls  Yes  No

Request Priority  Derived  Selected

Handshaking  Yes  No

Handshaking Close Action  Days

Approval Reminder  Yes  No

Default Notes Visibility  Public  Private

Allow Unknown  Yes  No

Archive Requests  Yes  No

Default SLA

Default Incident Team

Default Problem Team

Default Change Team

Default Request Team

**Review Options**

Review SLA  Yes  No

Review RFC  Yes  No

**KBA Options**

Control KBA via Request  Yes  No

---

### Request Options

Enable Escalation Control

Enables escalation to be enabled or disabled on a per request basis. This option is only available to Supervisor Users.

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---

## Request Options

---

|  |   |
|--|---|
| Queues                                 | Allows Teams to use a holding bay for requests that are received via email or the Customer Portal. The Queues can be enabled within the Team Information screen, on a per Team basis.   |
| Control Deployments via RFC            | When enabled, Change Requests are automatically created from newly entered Deployments, and will require approval before work commences on the Deployment.  |
| Control CMS via RFC                    | When enabled, changes made within the CMDB by a Technician will generate a Change Request requiring approval before the change is implemented.  |
| Customer CMS via RFC                   | When enabled, Customers creating Items via the Customer Portal generate a Change Request that requires approval before the change is implemented in the CMDB.   |
| Minimum Solution Relevance             | Define the minimum degree of relevancy for content included in the Description field of a request, when the system automatically searches the Knowledge Base to propose solutions.  |
| Enable Quick Calls                     | Enables the functionality that allows the Supervisor to profile Requests using Quick Call Templates. These can be used by other system Users when creating new requests.  |
| Request Priority<br>(Derived/Selected) | Enable Derived to allow the system to derive the Priority based on Urgency and Impact of the request . Enable 'Selected' to manually apply the Priority from a list of options.   |
| Default Priority                       | **This option is displayed when the Incident Priority is set to Selected. The selection made from the drop-down menu, is automatically applied as the default Priority for newly created requests.  |
| Handshaking                            | <p>Enables notifications to be sent to a Customer using the Propose button within an Incident or Request, stating the Incident/Request will be closed if no reply is received from them within a set number of days.</p> <p><b>NOTE:</b> Note: The Solution button within an open Incident/Request is not accessible when the Handshaking facility is enabled.</p> <p>When enabled, if Problems or Changes are closed, any related Incidents or Requests are moved to the Pending - Approval State not to the default Closed State.</p> |

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## Request Options

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|   |  |
|---|--|
| Handshaking Close Action                        | <p>Sets the system default number of days to lapse before an Incident or Request will close if the Customer does not respond to the handshake email notification. This can be adjusted on a per Org Unit basis.</p> <p><b>NOTE:</b> Note: To allow Customers to re-open an Incident or Request using the link in the handshake email, the web server must be using Port 80.</p>              |
| Approval Reminder                               | <p>To automatically send Managers reminder emails regarding Requests requiring their approval, set this option to Yes. When Yes is selected, define the number of days to lapse before a reminder will be sent.</p> <p>The content of the reminder email is drawn from the ApproveChange or ApproveServiceRequest template. These are configured within Setup&gt;Email&gt;Templates tab.</p> |
| Default Notes Visibility                        | <p>Sets the system default visibility of Notes, when added to requests. If it is expected that the majority of Notes are to be emailed to Customers, select Public.</p>  |
| Allow Unknown                                   | <p>When set to No and a User opens a request that is assigned the Unknown Service Item, the User will be prompted to update the Item before saving the request.</p>  |
| Archive Requests                                | <p>When enabled, the number of days a request is closed before being removed from the List View and archived is to be set.</p> <p>Requests that are archived have attachments removed and they are no longer included in the full text index for searching. They are still accessible for reporting purposes and attribute based searches.</p>   |
| Default SLA                                     | <p>Is used as the Default SLA when a new request is created without an SLA defined for the Item, Customer or Org Unit.</p>   |
| Default Incident* Team (required if using AMIE) | <p>Set the Default Incident Team, which is used for AMIE integration and also set as a default Support Team for Item Types.</p>  |
| Default Problem* Team (required if using AMIE)  | <p>Set the Default Problem Team, which is used for AMIE integration and also set as a default Support Team for Item Types.</p>   |
| Default Change* Team (required if using AMIE)   | <p>Set the Default Change Team, which is used for AMIE integration and also set as a default Support Team for Item Types.</p>  |
| Default Request Team* (required if using AMIE)  | <p>Set the Default Request Team, which is used for AMIE integration and also set as a default Support Team for Item Types.</p>   |
| Review Options                                  |  |

---

---

## Request Options

---

|                         |   |
|-------------------------|---|
| Review SLA              | When enabled will display the Review date field in the Service Level Information screen. The default number of days between reviewing SLAs should be set and the number of days before the review date for an Alert Reminder, should also be entered. |
| Review RFC              | When enabled the system will display a Review date in the RFC Information tab. The default number of days between reviewing RFCs should be set and the number of days before the review date for an Alert Reminder, should also be entered.           |
| KBA Options             |   |
| Control KBA via Request | When enabled, a Request is generated when the KBA is created, deleted or amended and can only be published to the KB by a User with publishing privileges.  |
| Request Type            | Specify the type of request to be generated when new or amended KB content is moved to a "Pending Publication" state.<br><br>(The options are based on the ownership of Change and Service Request licenses.)   |
| Default SLA             | Set the default SLA to be used for when requests are logged regarding updates in the knowledge base. Applying an SLA here, determines which workflow and team will receive the requests for approval, as with any other request logged in the system. |

---

\* To be set after Teams have been configured.

1. Click Yes to enable, or No to disable a Privilege option
2. Click Save.

## 5.4.5 System Privileges

The System Privileges screen allows an Administrator to control the following options:

- ◆ Knowledge Base
- ◆ Surveys
- ◆ Forums
- ◆ Chat
- ◆ Outages
- ◆ Other general settings.

### Enable System Privileges

To enable System Privileges:

1. Select Setup>Privileges>System

The System Privileges tab is displayed.

The screenshot shows the 'Privileges' configuration window with the 'System' tab selected. The window is organized into several sections, each with a set of configuration options. The 'General Settings' section includes fields for Host Address, Edit Item Numbers, Public Knowledge Base, Public Surveys, Public Alerts, Passwords (with sub-options Random, Email, and Manual), Password Questions, Session Timeout (30 minutes), Terminate Active Session, Default Name Pattern, Outbound Web Services, OpenID Provider, and OpenID Consumer. The 'Forum Options' section includes Use Forums, Default Sort Order (Ascending/Descending), and Public Forums. The 'Chat Options' section includes Enable Chat. The 'Outages Options' section includes Planned Outages Page, Outages Page, Minimum Criticality, Show Affected Relationships, Show Affected Users, Show Inactive Items, Show Change Requests, and Search Outages. The 'KBA Review Options' section includes Review KBA. At the bottom right, there are 'Re-index' and 'Save' buttons.

| Section            | Setting                     | Value                   |
|--------------------|-----------------------------|-------------------------|
| General Settings   | Host Address                | [Empty Field]           |
|                    | Edit Item Numbers           | Yes                     |
|                    | Public Knowledge Base       | Yes                     |
|                    | Public Surveys              | Yes                     |
|                    | Public Alerts               | Yes                     |
|                    | Passwords                   | Random, Email, Manual   |
|                    | Password Questions          | Yes                     |
|                    | Session Timeout             | 30 (minutes)            |
|                    | Terminate Active Session    | Yes                     |
|                    | Default Name Pattern        | [First name] [Last nam] |
|                    | Outbound Web Services       | On                      |
|                    | OpenID Provider             | On                      |
|                    | OpenID Consumer             | On                      |
| Forum Options      | Use Forums                  | Yes                     |
|                    | Default Sort Order          | Ascending               |
|                    | Public Forums               | Yes                     |
| Chat Options       | Enable Chat                 | Yes                     |
| Outages Options    | Planned Outages Page        | Yes                     |
|                    | Outages Page                | Yes                     |
|                    | Minimum Criticality         | Moderate                |
|                    | Show Affected Relationships | Yes                     |
|                    | Show Affected Users         | Yes                     |
|                    | Show Inactive Items         | Yes                     |
|                    | Show Change Requests        | Yes                     |
|                    | Search Outages              | Yes                     |
| KBA Review Options | Review KBA                  | Yes                     |

2.

| Customer Privileges      | Description   |
|--------------------------|---|
| Host Address             | To be completed with details of the machine hosting the application, if required.   |
| Edit Item Numbers        | Allows users to edit the identification number of an Item.  |
| Public Knowledge Base    | Allows access to the Public Knowledge Base on the Login Page.   |
| Public Surveys           | Provides access to Public Surveys on the Login Page.  |
| Public Alerts            | Alerts with the visibility defined as "Everyone" will be made available on the Login Page.  |
| Passwords                | <p>When LDAP or Active Directory Authorization is not used internal authentication is used. To define the password type to be used by the system select:</p> <p><i>Random:</i> the system will generate a random string whenever a password is reset.</p> <p><i>Email:</i> The Users Email Address will be used as the password.</p> <p><i>Manual:</i> Allows the User to manually create a password.</p>   |
| Password Questions       | Enables the ability to set security questions within the My Account screen for Customers and Users, which are referenced when resetting or re-sending login credentials.  |
| Session Timeout          | <p>The number of minutes the system waits before terminating idle sessions.</p> <p><b>NOTE:</b> Ensure that the session timeout on the server hosting the application, is equal to or greater than the Timeout option defined in the System Privileges. For changing the timeout option on the server that is hosting the application, edit as follows:</p> <ul style="list-style-type: none"> <li>◆ For a standalone application: Edit the / &lt;NSD_server_installation_path&gt;/ Server/webapps/LiveTime/WEB-INF/web.xml file.</li> <li>◆ For an appliance: Edit the srv/tomcat6/webapps/LiveTime/WEB-INF/web.xml file.</li> </ul> |
| Terminate Active Session | When enabled, if a User attempts to log into the system when they already have an active session, they will be prompted to end the active session to allow for the new login.   |
| Default Name Pattern     | Select the order for names being displayed in the system, when the First and Last Name are shown together on a screen.  |

| Customer Privileges             | Description   |
|---------------------------------|---|
| Outbound Web Services           | When enabled, request Workflow States and Item Lifecycle States can be assigned a 'listener', which allows these details to be updated in external systems. (Refer to the Extend section of the LiveTime website for details on how to develop a listener.)   |
| OpenID Provider                 | <p>Enables the system to function as an OpenID Provider for User authentication across network resources, as the user authentication source.</p> <p>The OpenIDProvider URL should be:</p> <pre data-bbox="899 575 1317 680">&lt;PROTOCOL&gt;://&lt;SERVER&gt;/LiveTime/ WebObjects/LiveTime.woa/ wa/providerLookup</pre> <p>The Protocol should be set to http or https and the server details should include where the system is hosted.</p> |
| OpenID Consumer                 | Enables the system to delegate authentication of Users and/or Customers to one or more OpenID Providers (i.e., Google, Yahoo). OpenID Providers that are to be used as delegates are configured in the Setup>Authentication>Social tab.   |
| Forum Options                   | <p>Use Forums</p> <p>This option enables and disables all Forums within the system.</p>   |
| Default Sort Order              | Sets the default Forum Topic sort order to either ascending or descending.  |
| Public Forums                   | This option enables Public Forums to be viewed from the login page and does not require an account to view.   |
| Chat Options                    | <p>Enable Chat</p> <p>Select 'Yes' to activate Chat facility within the application.</p>  |
| Chat Request Assignment         | Set to Technician if Customers are to be restricted to chatting only with the Technician assigned to their Request. Set to 'Team' to allow Customers to chat with any member of the Team assigned to their request.   |
| Default Technician Availability | Sets the default availability for chat status in newly created Technician Account information screens.  |
| Outages Options                 | <p>Planned Outages Page</p> <p>A link to the Planned Outages page is displayed on the Login Screen. Outages can be set within Configuration Item properties to schedule when the item will be off-line.</p>   |

| Customer Privileges         | Description   |
|-----------------------------|---|
| Outages Page                | A link to the Outages Page is displayed on the Login Screen.  |
| Minimum Criticality         | Defines the Minimum Criticality required for Items to be displayed on the Outages pages.  |
| Show Affected Relationships | Enables Item from the Outages page to show the Item's Relationships.  |
| Show Affected Users         | Allows Item owner's details to be displayed on the Outages page.  |
| Show Inactive Items         | Displays inactive Items on the Outages page.<br><br>An inactive Item is an Item that is currently not in use by the organization.   |
| Show Change Requests        | Allows Customers to view Change Requests related to Outages displayed in the Customer Portal.   |
| Search Outages              | Enables Outages to be searched using the Customer email addresses or Item number.   |
| KBA Review Options          |   |
| Review KBA                  | When enabled a Review date field is displayed in the KBA Information screen. The default number of days between reviewing KBAs should be set and the number of days before the review date for an Alert Reminder, should also be entered. |

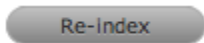
3. Click Yes to enable, or No to disable a Privilege option
4. Click Save.

---

**NOTE:** Note: All Outages options apply to Service Manager only.

---

## Re-Index Button



The Re-Index button at the base of the System Privileges page is used to re-build the system index. If the search engine appears to be failing text searches, this process will re-create the index. The indexing rebuild runs as a background process.

The following content and attachments is re-indexed:

- ◆ Knowledge Base
- ◆ Forums
- ◆ All requests
- ◆ Items.



## 5.5 Customize

### 5.5.1 Customize

The *Customize* menu allows the Administrator to brand the application where system banners can be replaced with the appropriate organizational banners. Graphics included should be . PNG images. The Application Banner should be 200 x 60 pixels and all other banners should be 500 x 70 pixels.

#### Adding a Customized Banner

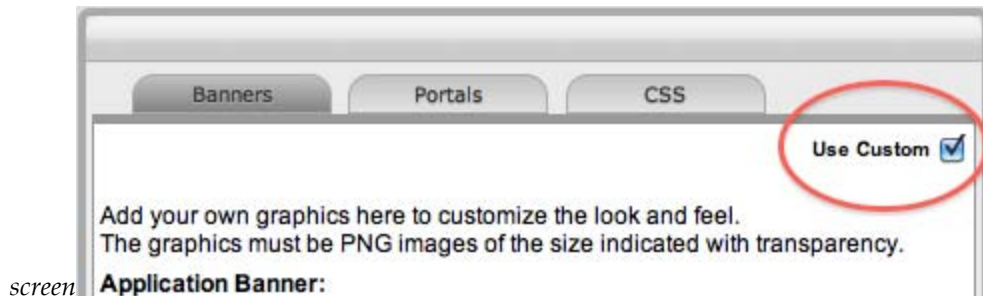
To add a customized banner:

1. Select Setup>Customize
- 2.

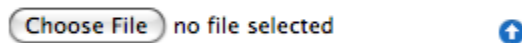
| Banner Type  | Displayed   |
|--------------|---|
| Application  | Visible on the Log in page of the system.   |
| User         | Visible in the portals for Supervisor, Technician, Administrator, Partner, Finance and Manager Users  |
| Public/Email | Displayed on public portals for Knowledge, Outages, Surveys and Forums. This banner is also included in emails when the Setup>Email>Setup option of Include Banner is set to Yes. |
| Customer     | Visible in the Customer Portal.   |


**NOTE:** Banners for Partner Organizations can be uploaded in the Banners tab of the User>Partner Organization screen. This will override the system Customer Portal banner for Customers associated with the Partner Organization.

3. To use *Custom Banners*, select the *Use Custom* checkbox at the top of the *Customize Banners*



4. To upload a new banner, click *New*  
A window with a browse function appears.



5. *Browse* to the location of the image and click   
The image will be uploaded.

6. Repeat the process until all banners have been replaced

7. Click Save.

---

**NOTE:** When the Purchase Orders functionality is enabled within the Setup>Billing tab, the option to upload a logo that will be used for system generated POs is displayed. The graphic should be saved as 150x150 PNG file.

---

## Portals Tab

All Public Access home page messages can be fully customized under the Portals tab. Links to documents and downloads may be added. The home page messages can be customized for:

- ◆ Alerts
- ◆ Forums
- ◆ Knowledge Base
- ◆ Login Page
- ◆ Public Outages
- ◆ Planned Outages
- ◆ Surveys
- ◆ Customer Portal welcome message.

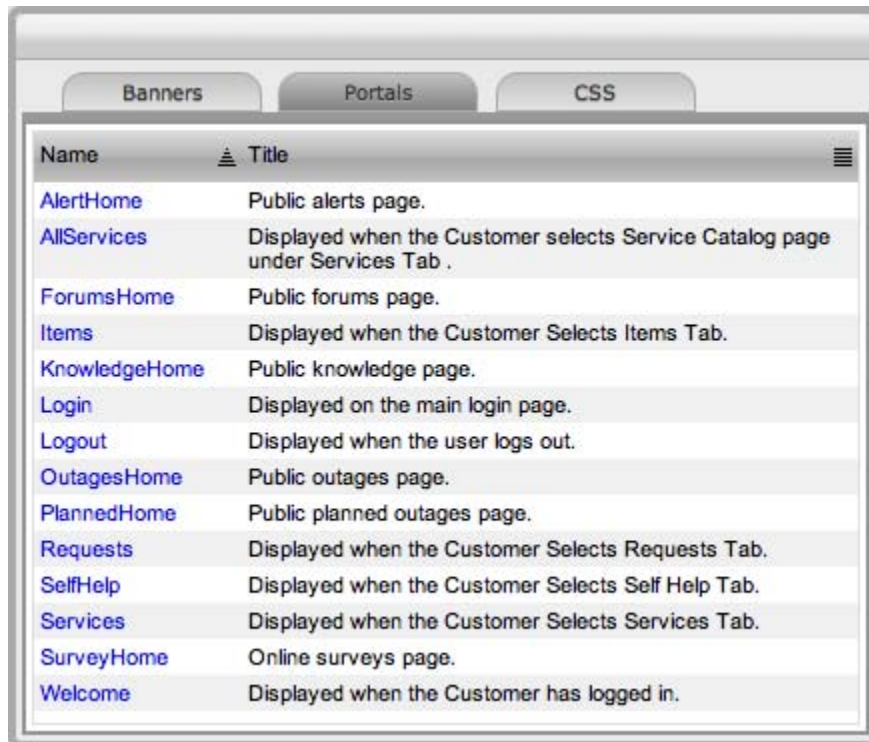
---

**NOTE:** Outage Home and Planned Home Messages apply in Service Manager only.

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To customize a Public Access message:

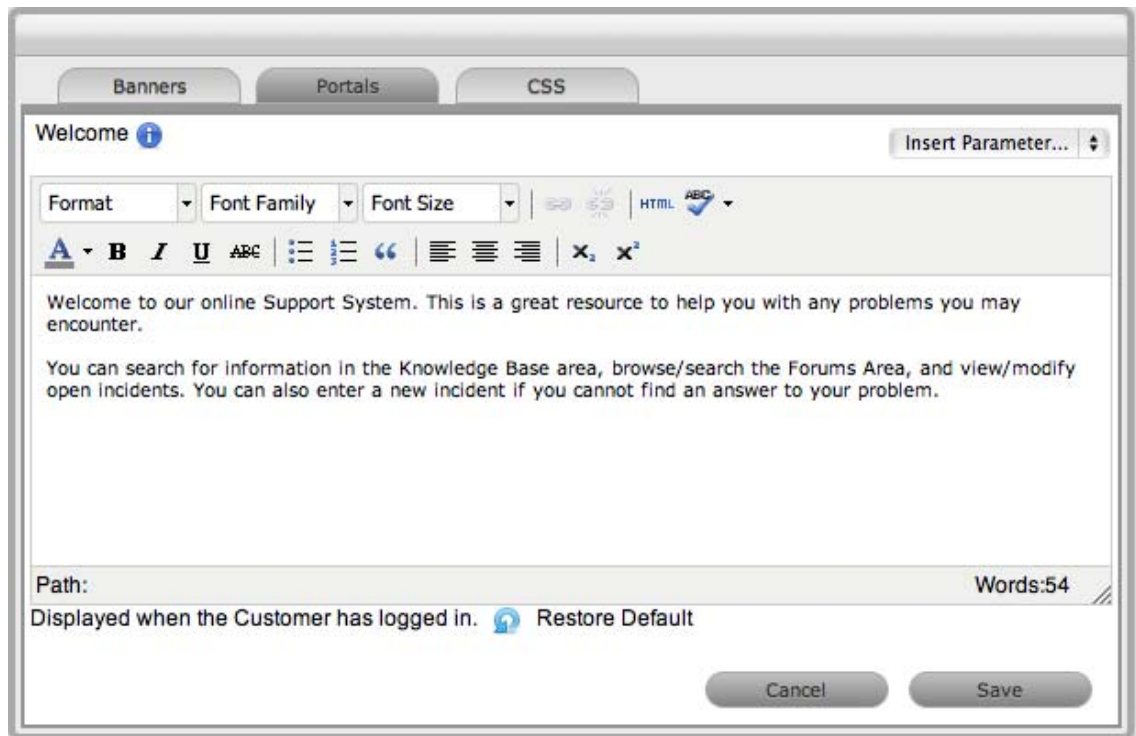
1. Select Setup > Customize
2. Click the Portals tab



The screenshot shows a window titled 'Portals' with three tabs: 'Banners', 'Portals', and 'CSS'. The 'Portals' tab is active, displaying a table with two columns: 'Name' and 'Title'. The table lists various messages and their descriptions.

| Name                          | Title   |
|-------------------------------|---|
| <a href="#">AlertHome</a>     | Public alerts page.   |
| <a href="#">AllServices</a>   | Displayed when the Customer selects Service Catalog page under Services Tab . |
| <a href="#">ForumsHome</a>    | Public forums page.   |
| <a href="#">Items</a>         | Displayed when the Customer Selects Items Tab.                                |
| <a href="#">KnowledgeHome</a> | Public knowledge page.  |
| <a href="#">Login</a>         | Displayed on the main login page.   |
| <a href="#">Logout</a>        | Displayed when the user logs out.   |
| <a href="#">OutagesHome</a>   | Public outages page.  |
| <a href="#">PlannedHome</a>   | Public planned outages page.  |
| <a href="#">Requests</a>      | Displayed when the Customer Selects Requests Tab.                             |
| <a href="#">SelfHelp</a>      | Displayed when the Customer Selects Self Help Tab.                            |
| <a href="#">Services</a>      | Displayed when the Customer Selects Services Tab.                             |
| <a href="#">SurveyHome</a>    | Online surveys page.  |
| <a href="#">Welcome</a>       | Displayed when the Customer has logged in.                                    |

3. Select the Name hyperlink  
The HTML editor appears.



4. Edit the message as required
5. Click Save.

## Cascading Style Sheets

The system can be further customized using cascading style sheets (CSSs) to amend:

- ♦ Color
- ♦ Fonts
- ♦ Tabs
- ♦ Graphics.

See: [CSS Tab](#).

## 5.5.2 Portals

All Public Access home page messages and some Customer Portal pages can be customized within the Portals tab.

Knowledge of HTML is required to edit this section. Links to documents and downloads may be added. The content can be customized for the following system Portals:

1.

| Name           | Description   |
|----------------|---|
| AlertHome      | Accessed by clicking the Alerts link on the system Login screen.  |
| AllServices    | Visible as the header within the Service Catalog screen of the Services tab in the Customer Portal.       |
| CustomerForums | Visible as the header within the Forums page of the Customer Portal.                                      |
| ForumsHome     | Visible as the header within the Forums pages of Public Forums.   |
| Items          | Visible in the Items tab within the Customer Portal.  |
| KnowledgeHome  | Accessed by clicking the Knowledge Base link on the system Login screen.                                  |
| Login          | Visible on the screen where system users enter their login credentials.                                   |
| Logout         | Visible on the page displayed when system users log out.  |
| OutagesHome    | Accessed by clicking the Outage link on the system Login screen of Service Manager installations.         |
| PlannedHome    | Accessed by clicking the Planned Outage link on the system Login screen of Service Manager installations. |
| Requests       | Visible in the Requests tab within the Customer Portal.   |
| SelfHelp       | Visible in the Self Help tab within the Customer Portal.  |
| Services       | Visible as the header within the Services tab of the Customer Portal.                                     |
| SurveyHome     | Displayed in the public online surveys page.  |
| Welcome        | Displayed on the landing page when the Customer logs into the Customer Portal.                            |

To customize a Portal message:

1. Select Setup > Customize

| Name                          | Title   |
|-------------------------------|---|
| <a href="#">AlertHome</a>     | Public alerts page.   |
| <a href="#">AllServices</a>   | Displayed when the Customer selects Service Catalog page under Services Tab . |
| <a href="#">ForumsHome</a>    | Public forums page.   |
| <a href="#">Items</a>         | Displayed when the Customer Selects Items Tab.                                |
| <a href="#">KnowledgeHome</a> | Public knowledge page.  |
| <a href="#">Login</a>         | Displayed on the main login page.   |
| <a href="#">Logout</a>        | Displayed when the user logs out.   |
| <a href="#">OutagesHome</a>   | Public outages page.  |
| <a href="#">PlannedHome</a>   | Public planned outages page.  |
| <a href="#">Requests</a>      | Displayed when the Customer Selects Requests Tab.                             |
| <a href="#">SelfHelp</a>      | Displayed when the Customer Selects Self Help Tab.                            |
| <a href="#">Services</a>      | Displayed when the Customer Selects Services Tab.                             |
| <a href="#">SurveyHome</a>    | Online surveys page.  |
| <a href="#">Welcome</a>       | Displayed when the Customer has logged in.                                    |

2. Select the Name hyperlink  
The HTML editor appears.

The screenshot shows an HTML editor window with the following elements:

- Tabbed interface with 'Banners', 'Portals', and 'CSS' tabs.
- Header: 'Welcome' with an information icon and an 'Insert Parameter...' dropdown.
- Toolbar: Includes 'Format', 'Font Family', 'Font Size', 'HTML' (checked), and various text formatting icons (bold, italic, underline, text color, background color, bulleted list, numbered list, quote, indent, outdent, link, unlink).
- Text Area: Contains the message:
 

Welcome to our online Support System. This is a great resource to help you with any problems you may encounter.

You can search for information in the Knowledge Base area, browse/search the Forums Area, and view/modify open incidents. You can also enter a new incident if you cannot find an answer to your problem.
- Footer: Shows 'Path:' followed by the text 'Displayed when the Customer has logged in.' and a 'Restore Default' button. A word count 'Words:54' is also visible.
- Buttons: 'Cancel' and 'Save' buttons at the bottom right.

3. Edit the message as required
4. Click Save.

## Cascading Style Sheets

The system can be further customized using cascading style sheets (CSSs) to amend:

- ♦ Color
- ♦ Fonts
- ♦ Tabs
- ♦ Graphics.

See: [CSS Tab](#).

### 5.5.3 Cascading Style Sheets (CSS)

The CSS tab allows Users to customize the look and feel of banner backgrounds and tabs within the system. Knowledge of working with cascading style sheets is recommended when making changes to these settings.

The options available for configuration include:

---

#### CSS Editor

---

##### Application Banners

|  |  |
|--|--|
| div.login-panel div.login-header div.login-title-custom    | This controls the style of the customized banner on the Login page.                    |
| div.login-panel div.login-header div.login-title-container | This controls the style of the default banner on the Login page.                       |
| div.login-panel div.login-header span.login-app-logo       | This controls the helpdesk icon graphic on the Login page.                             |
| #header .customPngBanner                                   | This controls the style of the customized banner within the User portal.               |
| #header .defaultBanner                                     | This controls the style of the default banner graphic within the User portal.          |
| #header .customPngBanner                                   | This controls the style of the customized banner within the Customer & Public portals. |
| #pageHeader .defaultBanner                                 | This controls the style of the default banner within the Customer & Public portals.    |

##### Menu Options (User Portal)

|                       |   |
|-----------------------|---|
| #menu a.active        | This controls the highlight on the active (main) menu selection.                                  |
| submenu a:hover       | This (in tandem with the span extension) controls the mouseover (hover) on the submenu tabs.      |
| #submenu a:hover span | This (in tandem with the hover default above) controls the mouseover (hover) on the submenu tabs. |
| #submenu a.active     | This controls the highlight applied to the selected submenu options.                              |

---

If unwanted changes are made to the system Style Sheets, use the Default button to return the system to the out-of-the-box format.

## 5.6 Localization

### 5.6.1 Regions

This option allows the Administrator to customize the geographic regions or States that are available for each Country. This information is applied to Customers and Org Units when their contact details are being defined. When the Customer or Org Unit "Country" field is completed within the information screen, the States that are displayed are drawn from the Geographic Regions defined here.

To define a State for a Country:

1. Go to Setup > Localization > Regions tab
2. Search and select a Country hyperlink from the list provided

The screenshot shows the 'Localization' window with the 'Regions' tab selected. The 'Details' section shows the following information:

- Name: Australia
- Continent: Asia Pacific
- Default Time Zone: (GMT +10:00) Melbourne, Sydney, Canbe
- States: A plus sign icon is visible next to the 'States' label.

Below the 'States' label is a table with the following data:

| Name   | Time Zone  |
|--|--|
| <a href="#">Australian Capital Territory</a> | (GMT +10:00) Melbourne, Sydney, Canberra, Port Moresby |
| <a href="#">New South Wales</a>              | (GMT +10:00) Melbourne, Sydney, Canberra, Port Moresby |
| <a href="#">Northern Territory</a>           | (GMT +9:30) Adelaide, Darwin                           |
| <a href="#">Queensland</a>                   | (GMT +10:00) Melbourne, Sydney, Canberra, Port Moresby |
| <a href="#">South Australia</a>              | (GMT +9:30) Adelaide, Darwin                           |
| <a href="#">Tasmania</a>                     | (GMT +10:00) Melbourne, Sydney, Canberra, Port Moresby |
| <a href="#">Victoria</a>                     | (GMT +10:00) Melbourne, Sydney, Canberra, Port Moresby |
| <a href="#">Western Australia</a>            | (GMT +8:00) Beijing, Perth, Singapore, Taipei          |

At the bottom of the table, it says '1 - 8 of 8 Results'. There are 'Cancel' and 'Save' buttons at the bottom right of the window.

3. Click **+** to add another State or region

The screenshot shows the 'Localization' window with the 'Regions' tab selected. The 'Details' section shows the following information:

- Name:
- Initials:
- Time Zone: (GMT +10:00) Melbourne, Sydney, Canbe

At the bottom right of the window, there are 'Cancel' and 'Save' buttons.

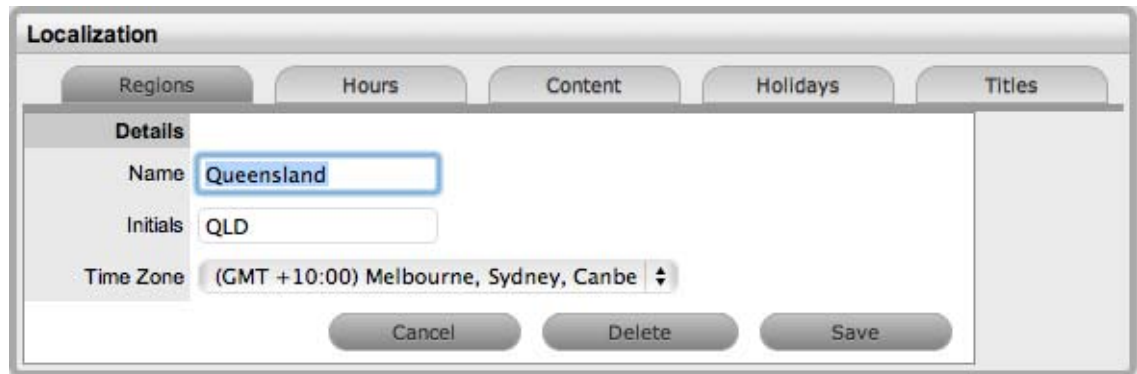
4. Enter the Name, representative Initials and select the relevant Time Zone

5. Click Save
6. Repeat Steps 3 to 5 to add more regions
7. Select Save.

## Editing States

A default or customized template can be easily edited:

1. Go to Setup > Localization > Regions tab
2. Search and select a Country hyperlink from the list provided
3. Select the relevant State Name hyperlink.



The screenshot shows a web application window titled "Localization". It has five tabs: "Regions", "Hours", "Content", "Holidays", and "Titles". The "Regions" tab is selected. Below the tabs is a "Details" section with the following fields:

- Name:** A text input field containing "Queensland".
- Initials:** A text input field containing "QLD".
- Time Zone:** A dropdown menu showing "(GMT +10:00) Melbourne, Sydney, Canbe".

At the bottom of the form are three buttons: "Cancel", "Delete", and "Save".

4. Edit the Name, Initials or Time Zone details
5. Select Save.

## Deleting a State

A default or customized template can be easily deleted:

1. Go to Setup > Localization > Regions tab
2. Search and select a Country hyperlink from the list provided
3. Select the relevant State Name hyperlink
4. Select the Delete button
5. Select Save.

## Region Search

To find a Country or State within a Country, the Search facility can be used. To conduct a search:

1. Go to Setup > Localization > Regions tab
2. Select Search



3. Enter the known details  
Search options include Country Name, Continent or can also be refined by the State within a Country.
4. Click Search.

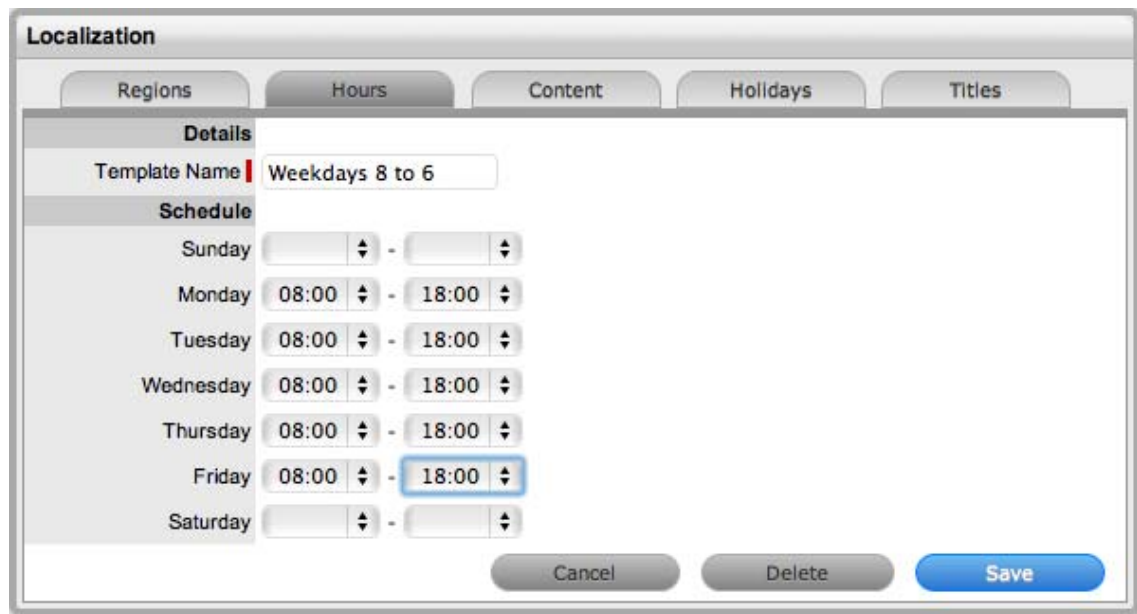
## 5.6.2 Hours

For the ease of configuring the Technician Scheduled hours of work and customizing hours of operation for Service Level Agreements, work hour templates can be created within the Setup>Localization>Hours screen. These templates are then made available throughout the application, wherever hours of operation are defined.

| Template Name   | Sunday | Monday        | Tuesday       | Wednesday     | Thursday      | Friday        | Saturday |
|-----------------|--------|---------------|---------------|---------------|---------------|---------------|----------|
| Weekdays 8 to 5 | N/A    | 08:00 - 17:00 | 08:00 - 17:00 | 08:00 - 17:00 | 08:00 - 17:00 | 08:00 - 17:00 | N/A      |
| Weekdays 9 to 5 | N/A    | 09:00 - 17:00 | 09:00 - 17:00 | 09:00 - 17:00 | 09:00 - 17:00 | 09:00 - 17:00 | N/A      |

To create a template:

1. Go to Setup>Localization>Work Hours tab
2. Click New
3. Enter the Template Name  
(Required.)
4. Set the hours of operation



5. Select Save.

## Editing a Template

A default or customized template can be easily edited:

1. Go to Setup>Localization>Work Hours tab
2. Click the relevant Template Name hyperlink
3. Amend the hours, as required
4. Select Save.

## Deleting a Template

A default or customized template is deleted from the List View:

1. Go to Setup>Localization>Work Hours tab
2. Click the Template Name hyperlink
3. Select Delete  
A warning message will be displayed.
4. Click OK.

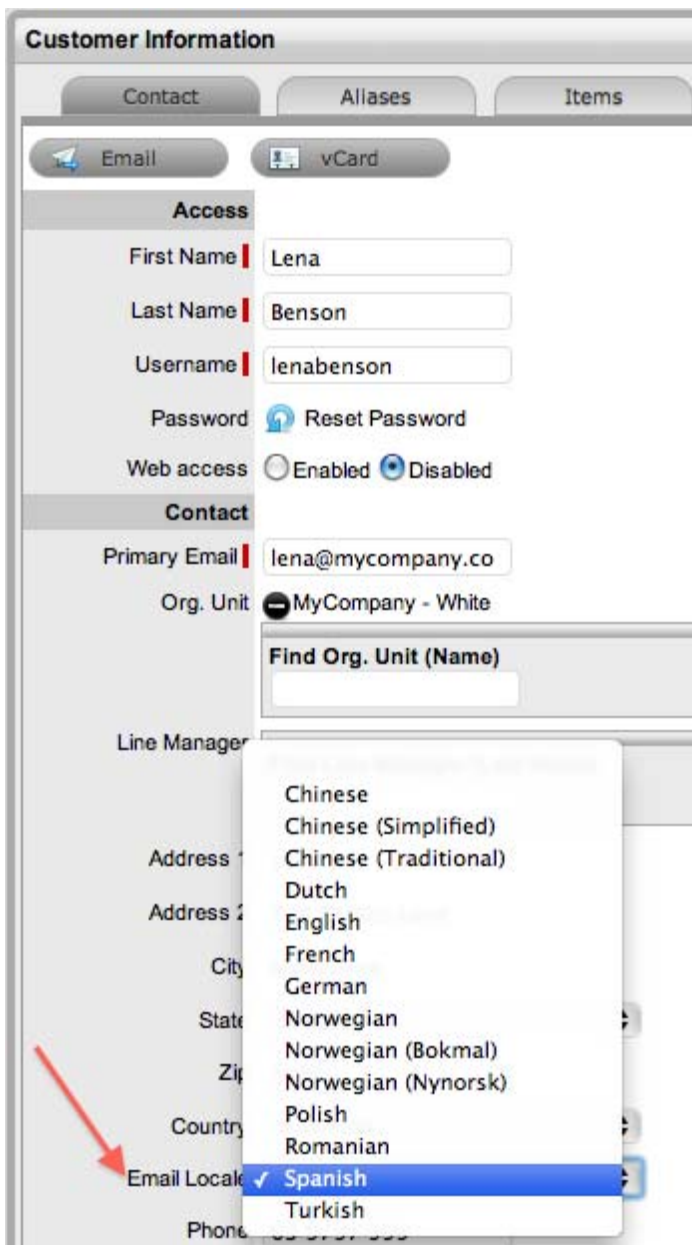
### 5.6.3 Content

The Content tab allows Users to configure automated messages, user interface and system objects content for language files used by the application.

| Localization      |                   |         |               |
|-------------------|-------------------|---------|---------------|
| Regions           | Hours             | Content | Titles        |
| Locale            | Language          | Country | Character Set |
| Chinese           | Chinese           |         | UTF-8         |
| Chinese (China)   | Chinese           | China   | UTF-8         |
| Chinese (Taiwan)  | Chinese           | Taiwan  | UTF-8         |
| Dutch             | Dutch             |         | UTF-8         |
| English           | English           |         | UTF-8         |
| French            | French            |         | UTF-8         |
| German            | German            |         | UTF-8         |
| Norwegian         | Norwegian         |         | UTF-8         |
| Norwegian Bokmål  | Norwegian Bokmål  |         | UTF-8         |
| Norwegian Nynorsk | Norwegian Nynorsk |         | UTF-8         |

1 - 10 of 14 Results

The customized content is applied to Customers and Users by setting the Email Locale option in their account information screen.



Content can be customized across the following elements and messages:

- ◆ [Email Keywords](#)
- ◆ [Email Message Templates](#)
- ◆ [Email Summary Tables](#)
- ◆ [Error Message Templates](#)
- ◆ [General Custom Fields](#)
- ◆ [Item Type Request Fields](#)
- ◆ [SMS Message Templates](#)
- ◆ [System Objects](#)
- ◆ [User Interface messages](#)
- ◆ [Email Signatures.](#)

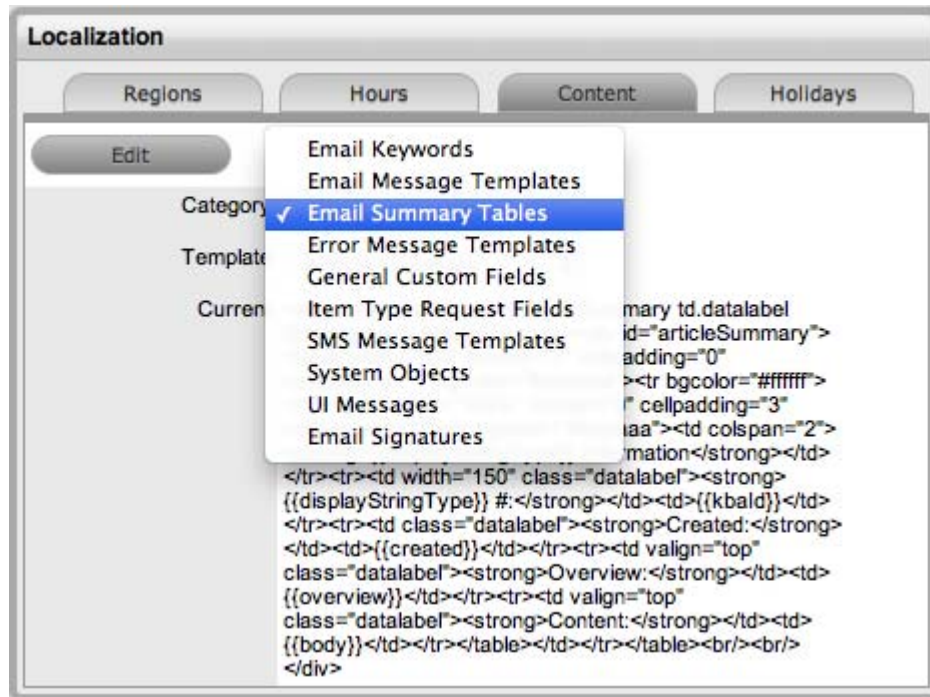
---

**NOTE:** It is recommended that the localization of user interface content, email and sms messages be done after they have been configured and reviewed within the Setup>Email and Setup>Customize tabs, respectively.

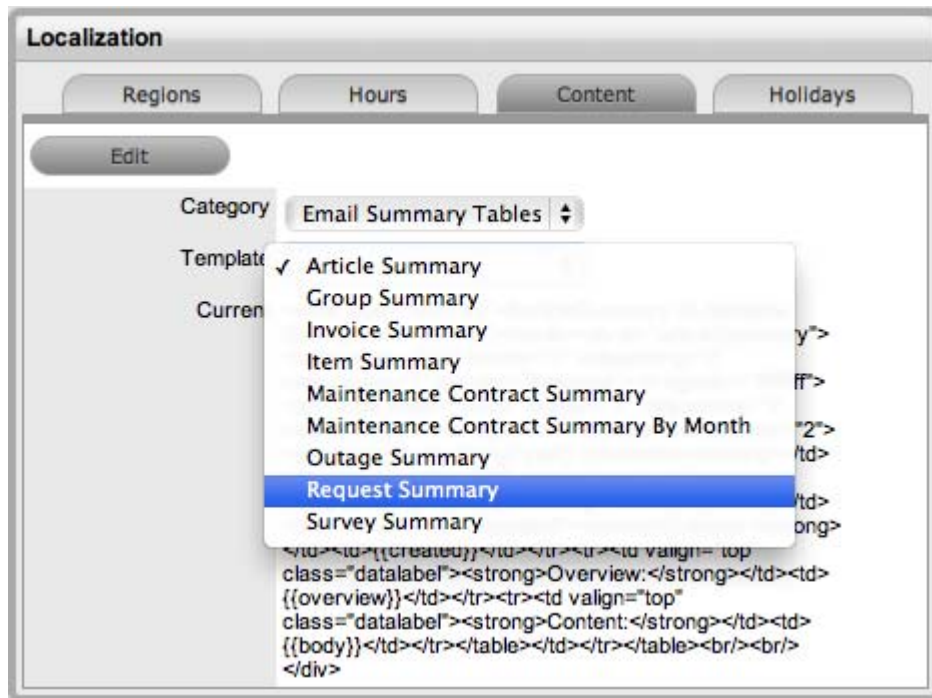
---

To customize content:

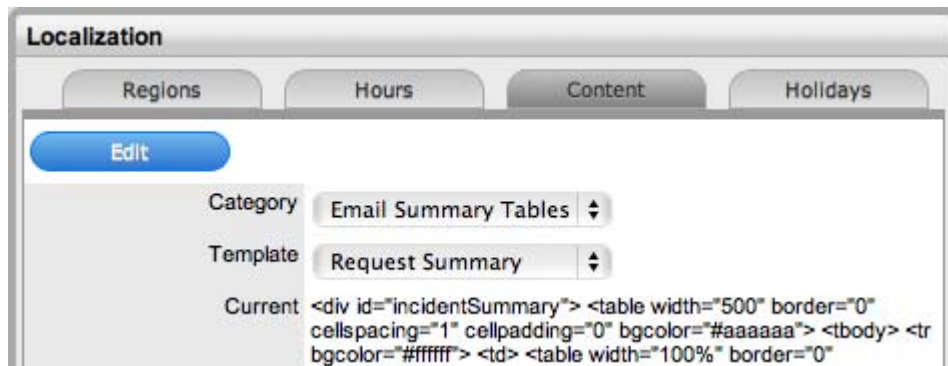
1. Select Setup>Localization
2. Move to the Content tab
3. Select the Locale link for the language file that is to be edited
4. Within the Category field, select the element to be customized



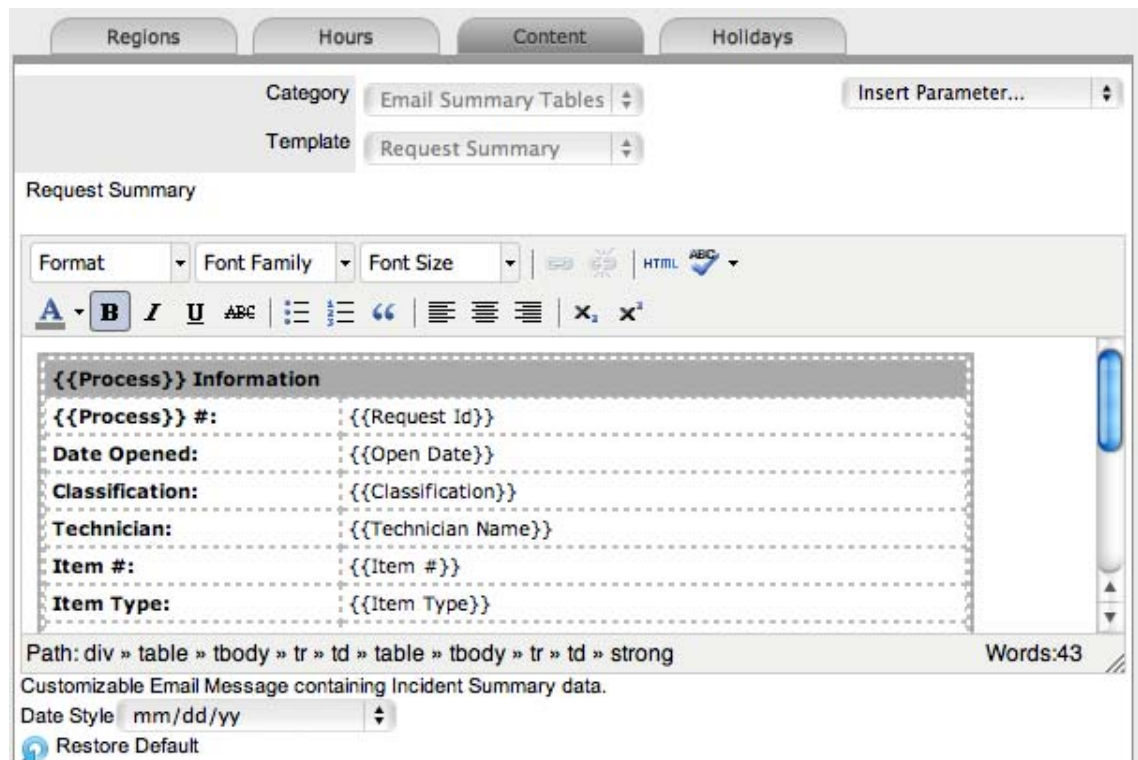
5. Within the default field displayed when the relevant Category is selected, choose the element to be customized



6. Click Edit



7. Amend the content and format, if required



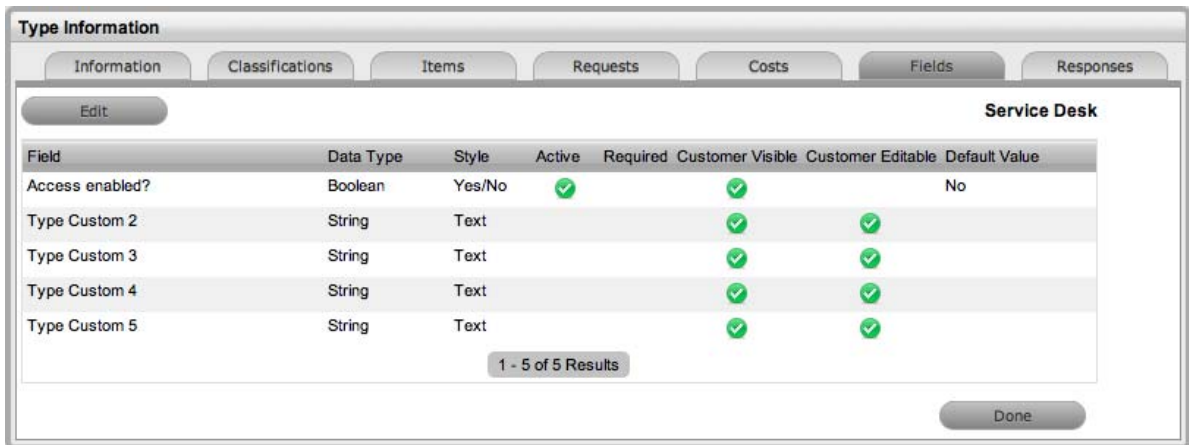
8. Click Save.

Repeat the above process for all the relevant elements in the default list or select the Content tab to return to the Locale list.

## 5.6.4 Item Type Request Fields

Within the system, service organizations can refine custom fields made available during the request creation process based on the Item assigned to the request. In the Fields tab a User can create custom fields that apply to the Item Type. Therefore, when a request is logged against an Item that uses an Item Type with custom fields configured within the Fields tab, the Fields are made available within the Details tab of the request creation process.

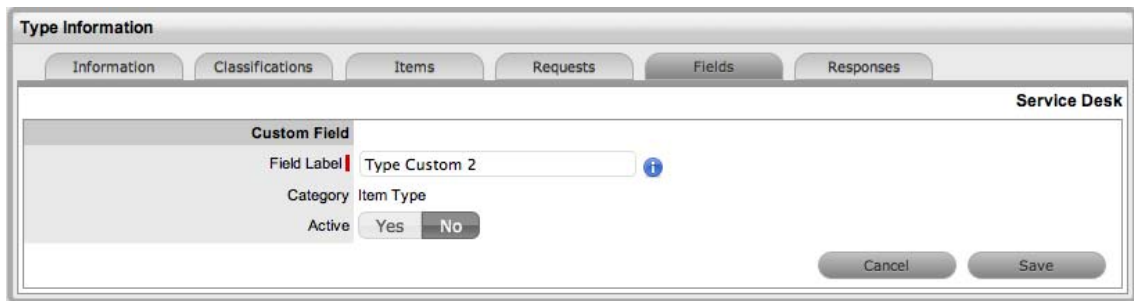
These fields are in addition to the fields created by the Administrator within the Admin>Setup>Custom Fields, which are created for the specific Process, such as Incident, Problem, Change and Service Requests.



To create Field labels within the Type Information screen:

1. Click the Fields tab
2. Click Edit
3. Select a Field hyperlink

The Custom Field screen is displayed.



4. Click Yes to activate the Field
5. Complete the following details:
- 6.

| Categories Fields | Description   |
|-------------------|---|
| Category          |   |
| Field Label       | The name of the field.  |
| Active            | Indicates if the field is active.   |
| Required          | Indicates if the field is required or mandatory field.  |
| Customer Visible  | Defines if the Customer can see the field within the Customer Portal.                             |
|                   | If Yes is selected, define if the Customer can edit the field information on the Customer Portal. |



| Categories Fields  | Description  |
|--------------------|--|
| Data Type          | <p>Dictates the field's Data Type. The options available include :</p> <ul style="list-style-type: none"> <li>◆ String - List or Free Text</li> <li>◆ Number</li> <li>◆ Boolean - radio buttons for Yes/No and True/False</li> <li>◆ Date - creates a date field</li> <li>◆ Currency- creates a currency field</li> <li>◆ Hyperlink.</li> </ul>                      |
| Style              | <p>Defines how the data is recorded or presented in the field. (e.g., String - List or Free Text field.)</p> <p>See <a href="#">Lists</a> or below for more information about creating a list within the field.</p>  |
| Unique Value       | <p>When active, the system prevents the duplication of data within the customized field.</p>   |
| Default Value      | <p>Value entered is the default system entry for the field, when the field is not completed manually.</p>  |
| Input Validation   | <p>When enabled the Input Mask and User Mask can be defined.</p> <p><i>Input Mask</i> : A regular expression to use for data validation of values entered by a User (i.e., Zip/Post Code, telephone no.)</p> <p><i>User Mask</i>: A User Friendly representation of the Input Mask that Customers can understand should it appear in a validation error message.</p> |
| Enable Description | <p>When enabled a Description field appears, allowing the User to enter details of what information is the field is expected to capture. These details are accessible next to the custom field on the relevant screen.</p>   |

7. Click Save

The active Field will now be available during the request creation process, for all Items that use the Item Type.

The screenshot shows a 'Request Information' window with two tabs: 'Customer' and 'Details'. The 'Details' tab is active. Under the 'Request' section, 'Request Type' is 'New Incident' and 'Classification' is 'Service Offline'. Under the 'Details' section, 'Access enabled?' has radio buttons for 'Yes' and 'No', with 'No' selected. A red arrow points to the 'Access enabled?' field with the text 'Field configured in the Item Type>Fields tab'. Below this is a 'Subject' field and a 'Description' field with a rich text editor toolbar. At the bottom, there is a 'Path' field and a 'Words: 0' counter. 'Cancel' and 'Done' buttons are at the bottom right.

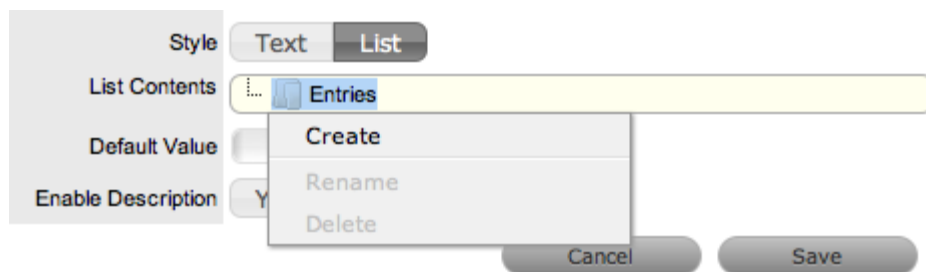
## Data Type - List

When the Data Type String - List is selected the List Contents field is displayed, which provides the facility to create a drop down list to be created as options within the field.

To create a new list entry within the List Contents field:

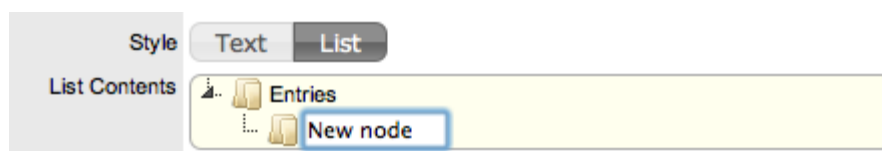
1. Right click the Entries link

The Create option is displayed

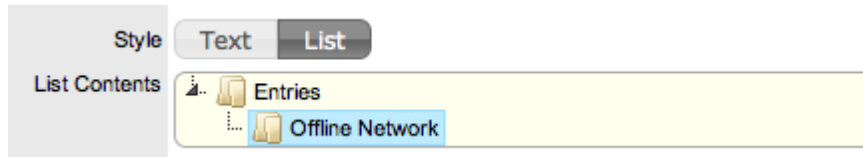


2. Click Create

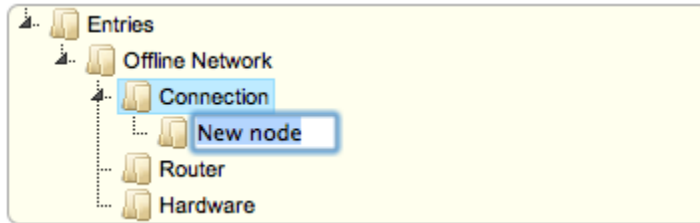
A New node link displayed



3. Enter the name of the field
4. Click outside the field to save the entry



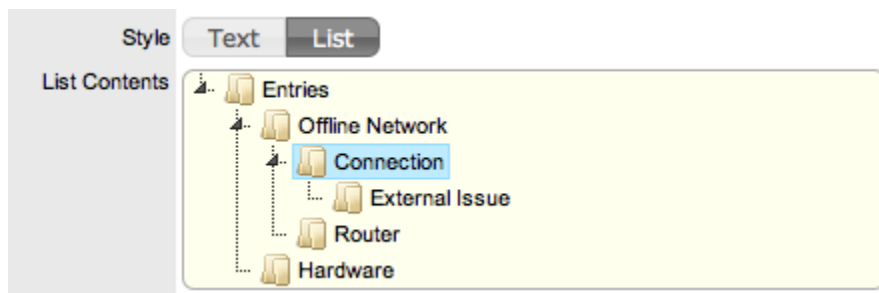
5. Repeat this process until all list entries have been added  
To create a nested list, right click on the relevant list entry and repeat the above process.



6. To move an existing entry to a new position, select the entry, then drag and drop the entry into its new location



7. When all the relevant details have been defined for the custom field, click Save.

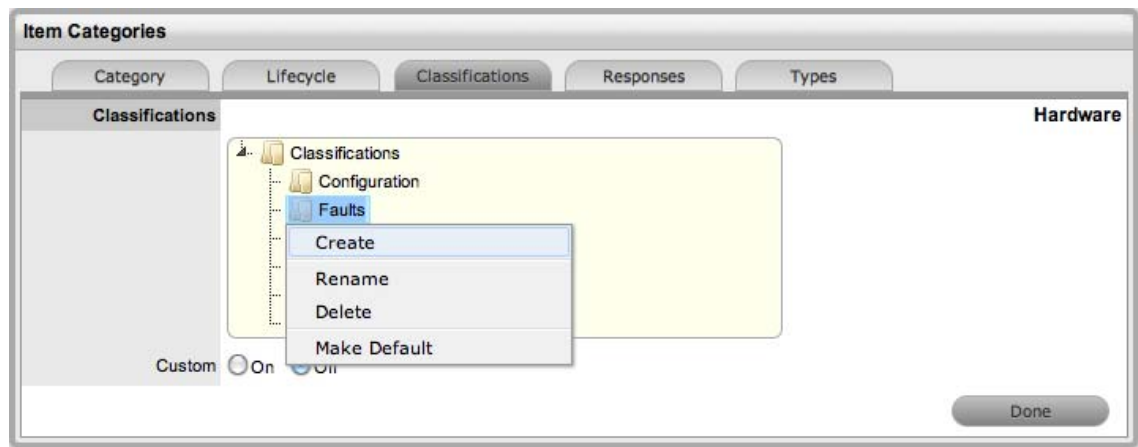


## Creating Nested List Entries

List entries can be expanded to include nested options.

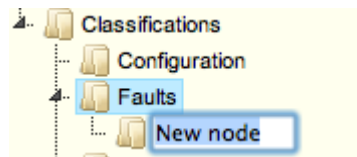
To create a nested list:

1. Right-click the relevant list entry header  
The Create, Rename, Delete and Make Default options are displayed.

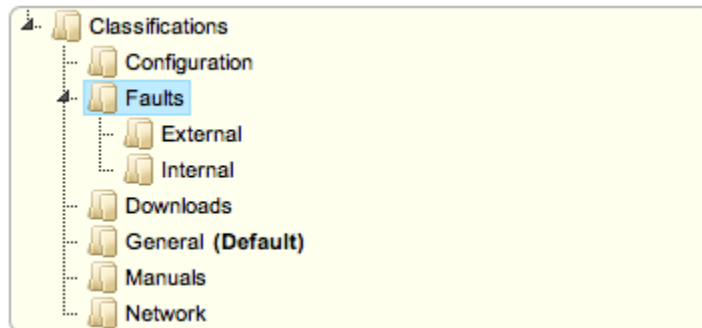


2. Select Create

A text box will appear under the list entry.



3. Enter the name for the list entry
4. Click away from the text box to commit and save the change
5. Move an existing list entry to a new position, if required  
Select the entry, then drag and drop the entry into its new location
6. The above steps can be repeated until the nested list is complete.

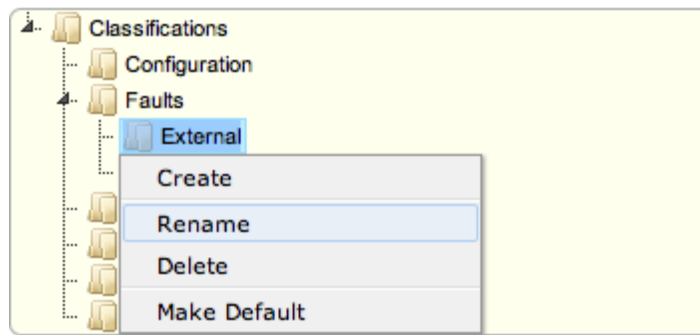


## Renaming a List Entry

Any list entry can be renamed.

To rename a list entry:

1. Right-click the list entry link



2. Click Rename
3. Edit the field content
4. Click away from the text field to save the change.

## Deleting a List Entry

To delete a list entry:

1. Right-click the relevant list entry
2. Click Delete
3. Click Done when the list is complete.

## 5.6.5 Priority

The Priority determines the timeframe in which an Incident should be handled and sets the service level targets adopted by the Incident that drive the SLA triggers and actions. It represents the degree of importance of the Incident to the Customer and also indicates the urgency of the request to the Technician.

An Incident can have one of four possible Priorities:

- ◆ Urgent
- ◆ High
- ◆ Medium
- ◆ Low.

### Setting Incident Priority

The Administrator configures the options for determining the Priority within the Setup>Privileges>Request tab. The Priority options include:

- ◆ Selected Priority - where the system configured default Priority is applied to the request but can be manually adjusted by the User
- ◆ Derived Priority - where the Impact is derived from the Item Criticality and the User enters the Urgency, enabling the system to calculate the Priority.

*Urgency:* The value selected reflects how quickly a resolution is required

*Impact:* The value selected indicates the impact the Incident has on the User and Organization. The higher the Impact the higher the Priority to resolve the Incident.

If the Administrator has set the Request Priority option to Derived, the Priority of an Incident results from the Impact being mapped from the Criticality of the Item and then combined with the selected Urgency. However, if required, the Impact can be manually adjusted within the Incident Information screen to affect the Priority.

The following table displays the calculations applied by the system using the Item Criticality mapped directly to the Incident Impact, to determine an Incident's Priority:

| Impact / Urgency | Urgent | High  | Moderate | Low   | Very Low |
|------------------|--------|-------|----------|-------|----------|
| Critical         | 1.000  | 0.850 | 0.700    | 0.550 | 0.410    |
| High             | 0.850  | 0.723 | 0.595    | 0.468 | 0.349    |
| Moderate         | 0.700  | 0.595 | 0.490    | 0.385 | 0.287    |
| Low              | 0.550  | 0.468 | 0.385    | 0.303 | 0.226    |
| Very Low         | 0.410  | 0.349 | 0.287    | 0.226 | 0.168    |

The above calculations result in the following Priorities:

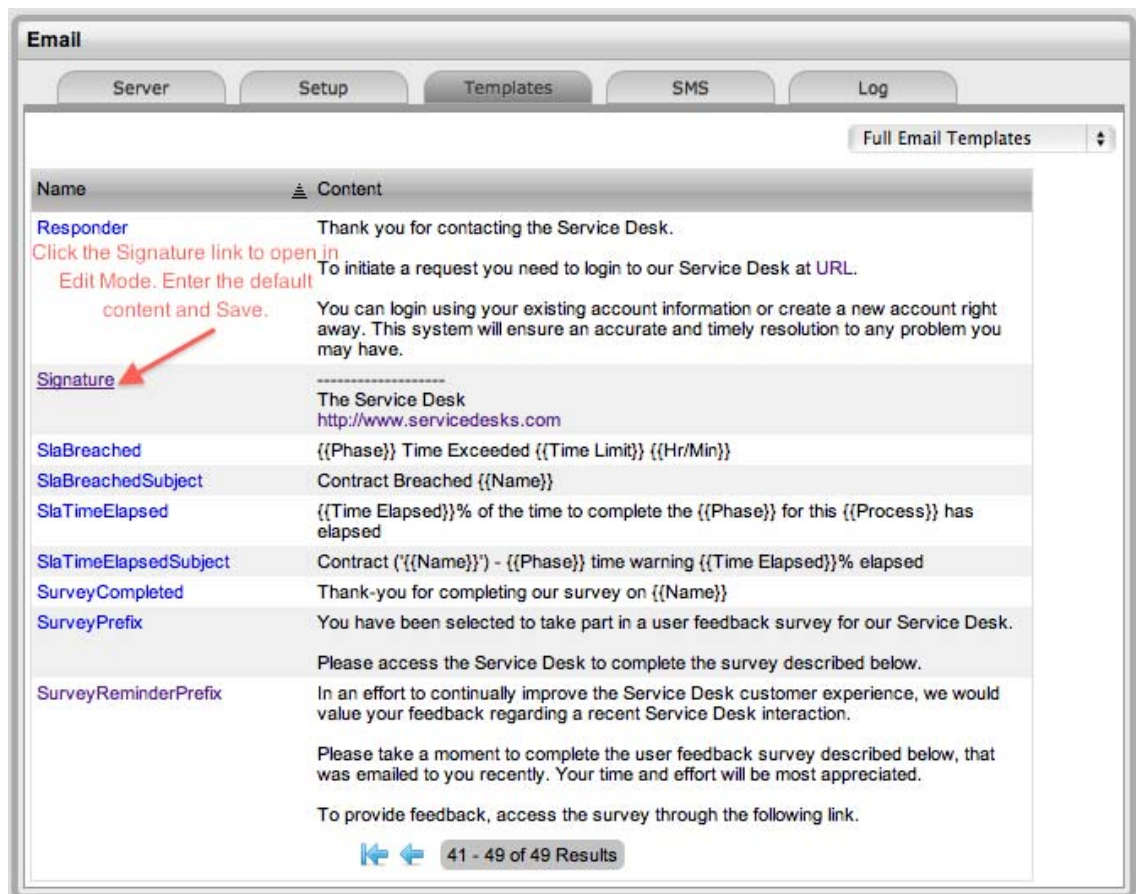
| Priority | Upper | Lower |
|----------|-------|-------|
| Urgent   | 1     | 0.83  |
| High     | 0.83  | 0.58  |
| Medium   | 0.58  | 0.34  |
| Low      | 0.34  | 0     |

## 5.6.6 Email Signatures

Email Signatures that are applied at the base of all emails sent by the system are customized within the Full Email Templates filter of the Setup>Email>Templates tab. These can also be customized on a per Team basis using the Localization functionality.

To set the system default Signature:

1. Select Setup>Email
2. Go to the Templates Tab  
The Full Email Templates filter view is displayed
3. Click to the final page of the Email Templates
4. Select the Signatures link



5. Edit the content
6. Click Save.

## Team Signatures

After Teams have been created by the Supervisor in the User>Teams tab, an Administrator can customize the content of the Signature for the Team within the Setup>Localization>Content tab. This function allows individual signatures to be customized for each Team and in the relevant language for Customers.

To amend the Signature details on a per Team basis:

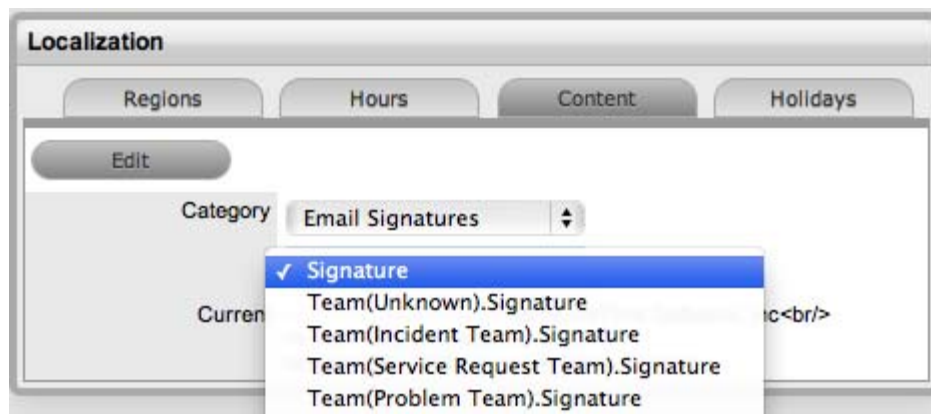
1. Select Setup>Localization
2. Click the Content tab
3. Select the Link of the language file to be customized

To create a signature file for each Team in English, select the English Locale link.

4. In the Category list select Email Signatures

A Signature list is displayed that includes the default Signature and the list of Team names configured in the system.

5. Select the Team Signature within the drop down list



6. Click Edit
7. Amend the signature details
8. Click Save.

## 5.6.7 Titles

When the Use Titles option is enabled in the Setup>Privileges>Customer tab, the Titles option is visible within the Setup>Localization screen. Titles configured here become an option within the Customer and User Information screens. When this option is enabled, a list of title options are displayed in the Titles table.

| Title      | Sort |
|------------|------|
| Dott.      | 1    |
| Dott.ssa   | 2    |
| Dr.        | 3    |
| Dra.       | 4    |
| Frau       | 5    |
| Frau Dr.   | 6    |
| Herr       | 7    |
| Herr Dr.   | 8    |
| Herr Prof. | 9    |
| Ing.       | 10   |
| M.         | 11   |

### Edit a Title

Titles listed can be re-named or have their sort order changed as required.

To edit a pre-existing entry in the Titles list:

1. Within Setup>Localization>Titles
2. Select the relevant Title hyperlink



3. Amend the Title detail, if required



The screenshot shows a window titled "Localization" with a "Titles" tab selected. Under the "Details" section, the "Title" field contains the text "Dott." and the "Sort Order" field contains the number "1". At the bottom of the window, there are three buttons: "Cancel", "Delete", and "Save".

4. Update the Sort Order detail, if required

This will change where the Title appears in the drop-down list options when the Title field is included in the Customer Information screen.

5. Click Save.

Alternatively, to remove an entry from the Titles list, select the Title hyperlink and click Delete.

## Create a Title

To create an additional Title list option:

1. Within Setup>Localization>Titles
2. Select the New button



The screenshot shows the same "Localization" window with the "Titles" tab selected. The "Title" field is now empty and has a blue border around it. The "Sort Order" field is also empty. The "Cancel" and "Save" buttons are visible at the bottom.

3. Complete the Title details
4. Enter Sort Order number

This will define where the Title appears in the drop-down list options when the Title field is included in the Customer Information screen.

5. Click Save.

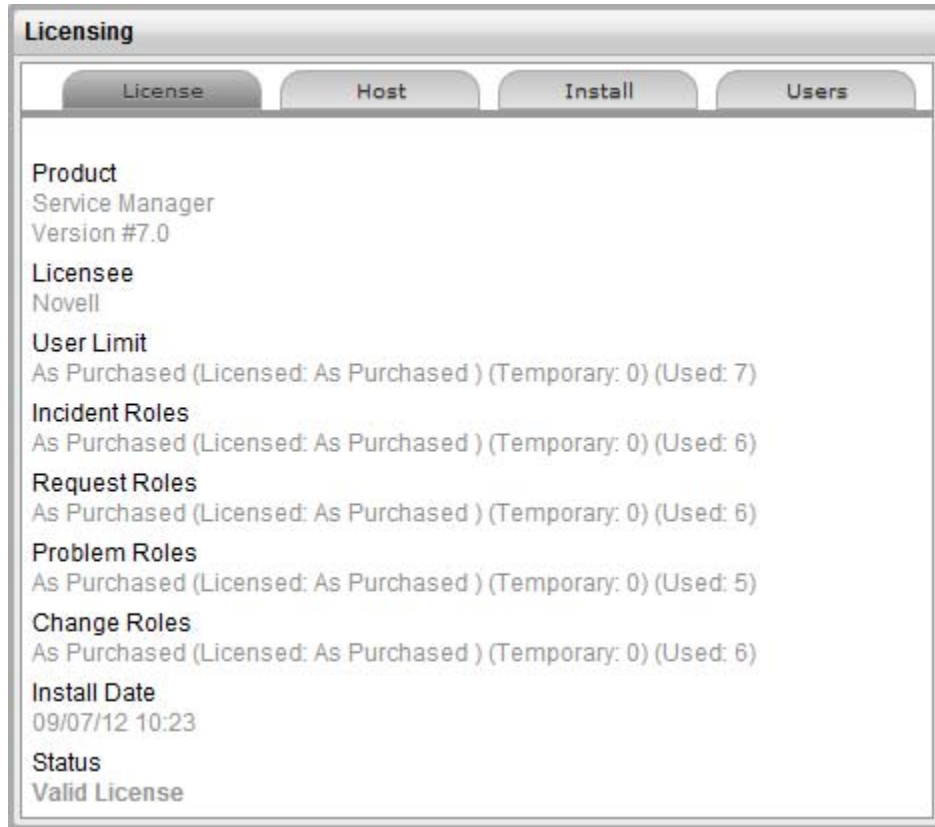
## 5.7 Licenses

The Licenses menu displays information about the currently installed license. Details of the current license, hosting server and licensed users can be viewed from this screen. A new license can also be installed.

## 5.7.1 Viewing a License

To view a license:

1. Select Setup > License. The Licensing page appears.



You can see the details about License information below:

| License Information | Details  |
|---------------------|--|
| Product             | Identifies which service management product is currently installed.  |
| Licensee            | The organization that holds the license.   |
| User Limit          | The maximum number of non-Customer users that are allowed to use the system. Value inside brackets indicates how many licenses have already been used. |
| Incident Roles      | The number of individual Incident Management licenses purchased.   |
| Request Roles       | The number of individual Request Fulfillment licenses purchased.   |
| Problem Roles       | The number of individual Problem Management licenses purchased.  |
| Change Roles        | The number of individual Change Management licenses purchased.   |

| License Information | Details   |
|---------------------|---|
| Install Date        | The date on which the license is installed.       |
| Status              | Indicates whether the license is currently valid. |

**NOTE:** Highlighted fields apply in Service Manager only.

## 5.7.2 Host Tab

The Host Tab shows the host name and IP address for the server where the application is deployed.

## 5.7.3 Install Tab

The Install Tab allows a new license to be entered using a License Key and Certificate for the application.

### Updating License Information

To update License Information:

1. Select Setup > Licenses > Install. The Install Tab appears.

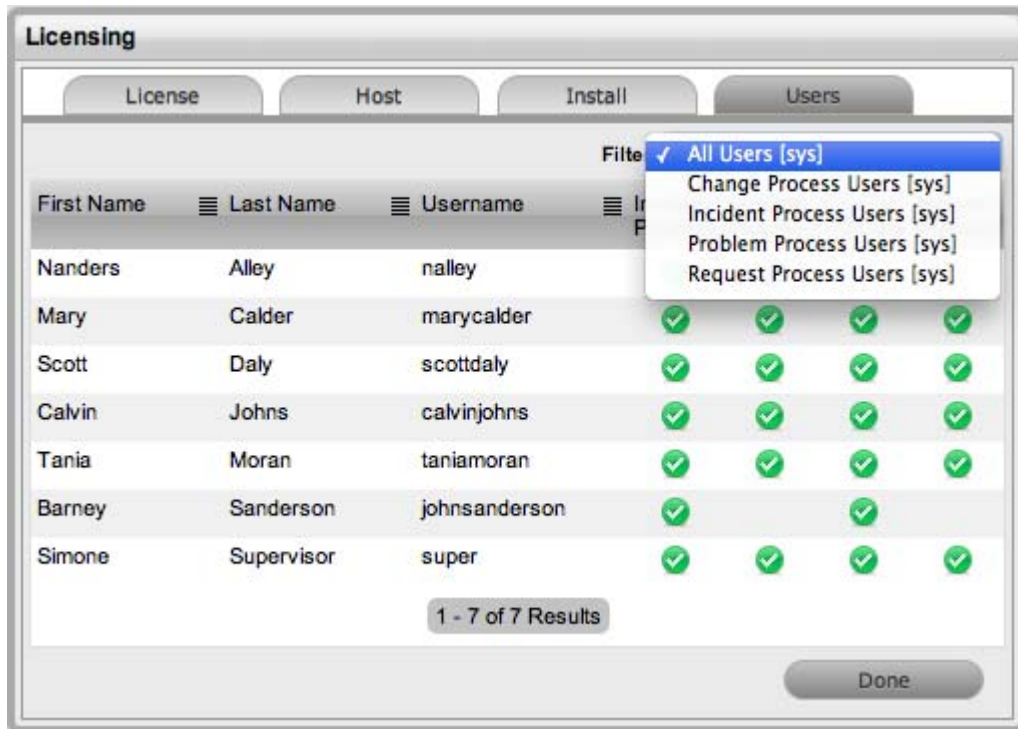


The screenshot shows a window titled "Licensing" with four tabs: "License", "Host", "Install", and "Users". The "Install" tab is selected and active. It contains two input fields: "License Key" (a text box) and "Certificate" (a larger text area). A "Save" button is located at the bottom right of the window.

2. Enter the license key for the application.
3. Enter the Certificate details.
4. Click Save. The License tab will show the updated license details.

## 5.7.4 Users Tab

The Users Tab lists all current Users of the system, including their assigned processes. Administrators can filter the list based on process by using the Filter drop-down box in the top right corner of the Users tab.



---

**NOTE:** The Process filter and columns (Problem, Change and Request Process Users) apply in Service Manager only.

---

## 5.8 Database

This section is used to specify the JDBC Database connection details that the service management application uses to connect to the database.

### 5.8.1 Configuring Database Settings

To configure database settings:

1. Select Setup>Database>Edit The Database Configuration screen appears.

---

### Database Setup

---

|               |  |
|---------------|--|
| Database Type | Use the dropdown box to select the type of database. |
| Server Host   | Enter the IP Address of the Server Host.             |
| Server Port   | Enter the Server Port number.                        |
| Database      | Enter the database name.                             |
| User name     | Enter the Username                                   |
| Password      | Enter the Password.                                  |

---

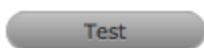
2. Enter or modify database connection details
3. Select the Test button to verify the details entered and check the connection
4. Click Save.

---

**NOTE:** The system must be re-started for any changes to take effect.

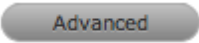
---

## 5.8.2 Test Button



Allows the Administrator to validate the database connection details between the service management application and the database. A system message will advise whether the connection was successful.

### 5.8.3 Advanced Button



The Advanced options allows the Administrator to change the default connection type, as well as generating scripts based on the database selected. *When the Advanced button is clicked, the Connection Type field displays a drop-down menu to select the JDBC connection. This option is set by default to Internal JDBC.*

---

**NOTE:** Changing the connection type to Custom JDBC Driver allows the Administrator to change the driver. *This option is NOT recommended.*

---

The screenshot shows a 'Database Configuration' dialog box with a 'Database' tab. It contains several fields: 'Connection Type' (Internal JDBC), 'Database Type' (MySQL), 'Server Host' (10.2.2.331), 'Server Port' (3306), 'Database' (ServiceManager\_65), 'Username' (stanley), and 'Password' (masked with dots). At the bottom, there are six buttons: Cancel, Create, Upgrade, Drop, Test, and Save.

The buttons displayed provide the following functionality:

---

| Advanced Settings | Description  |
|-------------------|--|
| Create            | Generates a SQL creation script for the connected database that can be used by a DBA to create the system database.                |
| Upgrade           | Allows DBAs to upgrade to the database for a new release.<br><b>NOTE:</b> Before upgrading make a backup of the existing database. |

---

| Advanced Settings | Description   |
|-------------------|---|
| Drop              | Creates a script that the database administrator can run against an existing system database to erase the schema and content. |

## 5.9 LDAP

### 5.9.1 LDAP Authentication

There are several ways to authenticate users of the service management application. By default the system uses its internal authentication mechanism but there is also the option to authenticate against one or more Directory Servers or use OpenID Providers.

#### Internal Authentication

Using internal authentication requires the Administrator or Supervisor to create accounts for all User types by entering the contact information, access levels and password. This information is then saved to the system database. The typical case for using Internal Authentication is where there are few Users, or in an environment that has no pre-existing directory server. Usually, the Administrator would configure the User accounts prior to announcing the system is operational, and from that point on, maintain the accounts as necessary. (See: [Create Customers](#) or [Create Users](#).)

#### OpenID Providers

OpenID is a decentralized process to verify a Customer's or User's online identity. It addresses the single sign-on issue by not relying on a centralized website to confirm a User's identity. The system can be enabled to be an OpenID consumer, which provides seamless authentication between third party authentication utilities and the service management system. OpenID Providers are configured within the Social tab, and Customers or Users that have accounts with the configured OpenID Providers can log into the system by selecting the relevant icon on the Login page.

#### Directory Server Authentication

The system allows the Administrator to connect to one or more Directory Servers for User authentication purposes. This removes the need to create User accounts as it allows the application to synchronize User accounts and access levels with the existing Directory Server. It has the added benefit of allowing the Administrator to work with existing infrastructure. (See: [AD Authentication](#) or [LDAP Authentication](#).)

#### Directory Server Groups (External Authentication)

[Roles](#) are used to grant access within the application. Users must be assigned to Groups on the directory server that correspond to the Roles within the support system. Group members are assigned Roles and access levels within the service management tool.

The default group names the system expects to find on the directory server are:

- ◆ Administrators
- ◆ Supervisors
- ◆ Technicians

- ◆ Partners
- ◆ Managers
- ◆ Finance
- ◆ Customers.

The Group names can be customized in the [LDAP/Active Directory Advanced tab](#). Users can belong to more than one group, for example if a User holds the Roles of Technician and Manager, they would belong to the Technicians and Managers groups.

---

**NOTE:** Users can have only one of the Partner, Supervisor and Technician Roles. Therefore, they can belong to only one of these groups. However, they may also belong to any other group, or combination of groups.

---

The following fields may or may not be mapped, depending on the options set by the system Administrator:

- ◆ First Name
- ◆ Last Name
- ◆ Email
- ◆ Phone
- ◆ Mobile
- ◆ Pager
- ◆ Address
- ◆ City
- ◆ Zip
- ◆ Country.

## Email Address

All User accounts must include an email address to be successfully imported into the system. If additional fields have been mapped from the authentication server to corresponding fields in the application, a drop-down menu containing all the optional values for the field will be available beside the mapped field. Choose the correct value from each list.

## Mixed Mode Authentication

The application can use a combination of internal and external authentication. This means, the service management tool can be synchronized with a Directory Server to import User and Customer details as well as allowing Customer Accounts to be created directly within the system. Such a feature is useful, if the service and support solution is being used for internal and external customer support.

To enable Mixed Mode authentication, after the system has connected to the Directory Server, move to the Setup>Privileges>Customer tab and enable the Include Customers option to display the Mixed Mode field. Set the Mixed Mode option to Yes.



---

**NOTE:** If authenticating against a Directory Server, all User accounts will validate against the server except for the application default Administrator User. The default Administrator User account details can be modified within the My Account tab of the application.

---

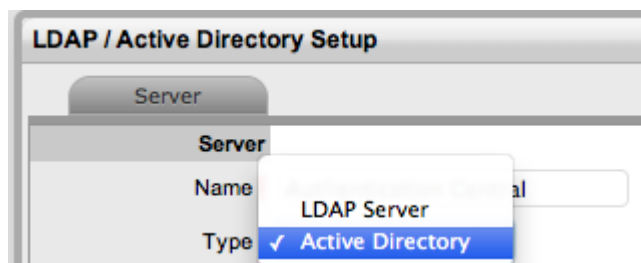
## 5.9.2 Active Directory Integration

Active Directory is a unique implementation of the LDAP standard, as the requirements for communication need to conform to the Microsoft™ Windows Authentication protocols. To meet this need, it is necessary to enter all domains from which Users will authenticate. Multiple sources of Active Directory can be synchronized with the system, if required.

### Configuring the Active Directory Integration

To configure the Active Directory integration:

1. Select Setup>LDAP
2. Click New  
The LDAP/Active Directory Server screen tab is displayed.
3. Enter the Server Name
4. Select Active Directory within the Type drop down list



5. Define all the Domains from which Users will be authenticated

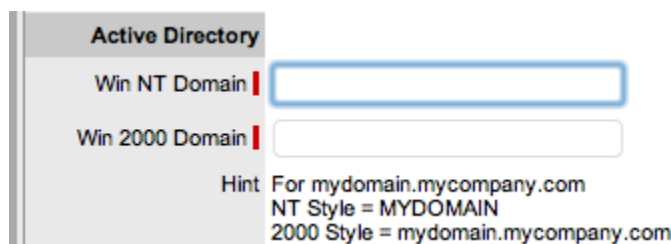
Domains will need to be entered in both NT and Windows 2000 domain naming systems formats. This is because Active Directory conforms to Microsoft™, Windows NT and Windows 2000 authentication protocols.

Make entries with care, as they are not validated against the Directory Server by the system Domain Editor.

---

**NOTE:** Verify the Active Directory setup before you provide the Windows NT domain and Windows 2000 domain credentials.

---



---

**NOTE:** Here is an example of both the naming conventions for the domain:

mydomain.mycompany.com

NT Style = MYDOMAIN

2K Style = mydomain.mycompany.com

---

6. Click New and enter domain information
  7. Click Save
  8. Using the drop-down arrow, select the Default Domain, which is used in the following three ways:
    - ◆ on the login page
    - ◆ to authenticate against, when synchronizing with the Directory Server
    - ◆ where the system expects to find the User Groups.
  9. Enter all other required fields to configure the Directory Server
  - 10.
- 

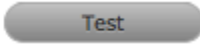
| Settings         | Description  |
|------------------|--|
| Security         | Determines how the integration layer will authenticate. For Active Directory this should be set to Cleartext– Username + Password. Anonymous connections to Active Directory are rarely enabled.   |
| Server Host      | Enter the hostname or IP address of the Active Directory Server. On a Windows NT domain this will be the primary domain controller.  |
| Server Port      | The default Active Directory Server Port is 389. This is rarely changed.   |
| Username         | Used by the system to authenticate against the Active Directory Server when reading account information. The domain prefix/suffix will be appended, based on the default domain, when connecting to the Server.  |
| Password         | Enter the Password for the Username account.   |
| Users Node       | <p>The component of the base domain name that refers to the location of the User Groups .For example, if the location of the User Groups is the following:</p> <p>ou=UserGroups, ou=MIS, dc=myoffice, dc=mycompany, dc=com (See <a href="#">LDAP/Active Directory Advanced Settings</a> for information on Group configuration.)</p> <p>Groups must be in the default domain, in this case myoffice.mycompany.com. The Users Node only needs the location of the Groups within the default domain, so the Users Node in this example will be: ou=UserGroups, ou=MIS.</p> |
| <i>Locale</i>    |  |
| Default Timezone | Select the default Timezone to be applied to all User accounts imported via Active Directory.  |

---

11. Click Save.

Repeat the above process to add more than one authentication server for authorizing User access.

## Test Button



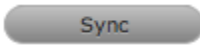
The Test button creates a connection to the Active Directory Server, applying the configuration settings. If successful, it will attempt to determine how many Users are in each group and display a Results Screen.

---

**NOTE:** If the test fails, an error message will display the cause.

---

## Sync Button



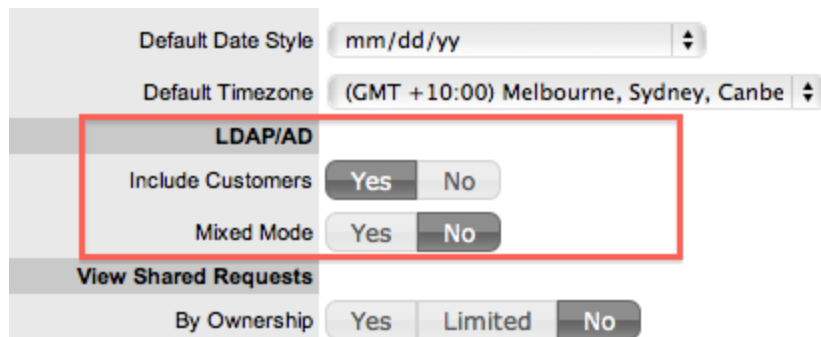
The Sync button runs the synchronization process to import all Users from the Server Directory. If new Active Directory Accounts have been created and those Users require immediate access to the system, a manual synchronization would be used.

Only one synchronization can run at a time. When multiple Users need access, create the accounts, then run a single manual synchronization.

A manual synchronization may take some time as it depends on the connection speed with the external service. The manual synchronization works best for small directories. Larger Active Directory implementations can take some time to propagate the changes, so account information may not be immediately available.

## Importing Customers

Customer details can be imported using Active Directory by enabling the option, if required. When the system is setup to synchronize with Active Directory, move to the Setup>Privileges>Customer tab and enable the Include Customers option.

A screenshot of a configuration form. At the top, there are two dropdown menus: "Default Date Style" set to "mm/dd/yy" and "Default Timezone" set to "(GMT +10:00) Melbourne, Sydney, Canbe". Below these is a section titled "LDAP/AD" enclosed in a red rectangular box. This section contains two rows of toggle buttons: "Include Customers" with "Yes" selected and "Mixed Mode" with "Yes" selected. Below the "LDAP/AD" section is another section titled "View Shared Requests" with "By Ownership" and three toggle buttons: "Yes", "Limited", and "No".

If there is a need to create Customers using Active Directory and the system's internal authentication capability, Mixed Mode authentication can also be enabled. After the option to Include Customers is set to Yes in the Customer Privilege tab, the Mixed Mode field is displayed. Set this option to Yes to allow Customers to be created directly in the system and using Active Directory.

## Imported Account Usernames

Accounts imported from Active Directory use the UPN as the Username, as opposed to the NT style login. The domain component of the UPN is derived from the selected domain in the popup on the login page, which means Users need to enter their login name only to connect to the support application.

Login details are passed directly to the directory server for authentication and are not retained within the service management system.

### 5.9.3 LDAP Server Integration

Multiple types and sources of directory servers can be synchronized with the system at any one time. Among the several LDAP servers supported by the system, and which this section discusses, are the following:

- ♦ Open LDAP
- ♦ Netscape Directory Server
- ♦ Novell eDirectory.

It should, however, be noted that LDAP does follow a standard and as such the settings detailed herein should also apply to other implementations.

## Configuring LDAP Server Integration

To configure LDAP Server integration:

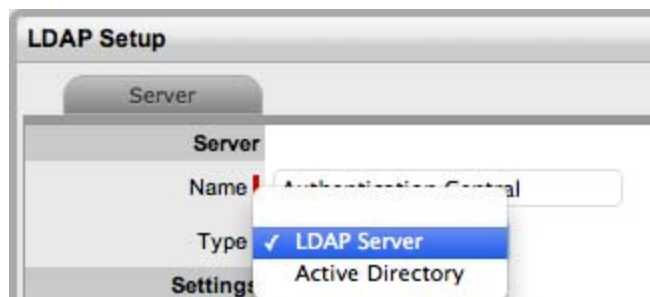
1. Select Setup>LDAP
2. Click New

The LDAP /Active Directory Server tab is displayed.

3. Enter the Server Name

(If the system is to synch with Zenworks, ensure the Server Name matches the User Source Name used by Zenworks.)

4. Select LDAP within the Type drop down list



5. Complete the Settings fields

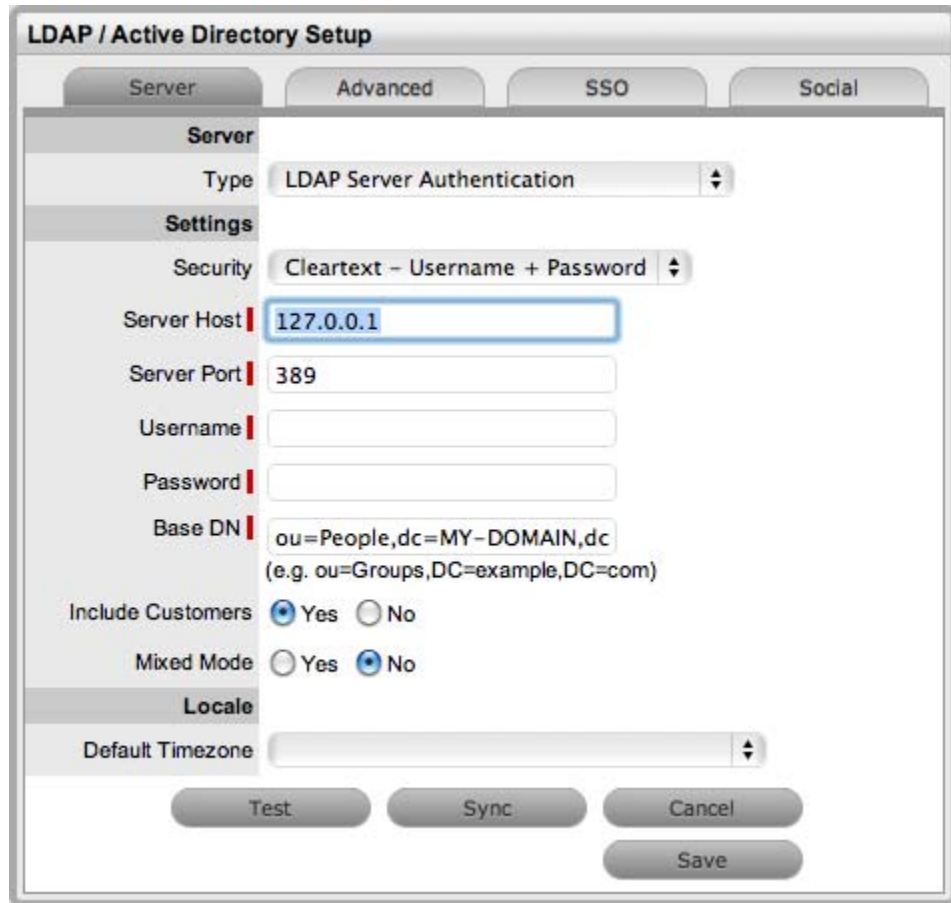
6.

---

| <b>Fields</b>      | <b>Description</b>   |
|--------------------|--|
| <i>Security</i>    | <p>Secure Socket Layering (SSL) encryption is provided for Active Directory and LDAP server integration. Details entered here determines how the integration layer authenticates.</p> <p>User authentication can be with Secure Socket Layering (SSL) or Clear Text. Select Anonymous or User name and Password.</p> <p>If Anonymous is selected, ensure anonymous access to the directory is available.</p>   |
| Server Host        | Enter the host name or IP Address of the LDAP Server.  |
| <i>Server Port</i> | This is the LDAP Server Port. The default is 389.  |
| <i>User name</i>   | <p><i>The system authenticates the user name against the LDAP Server. Leave this blank for anonymous connections.</i></p> <p>Where a user name is provided, Netscape allows the internal users to connect as the account name, so using 'cn=Directory Manager' is acceptable.</p> <p>Open LDAP expects the fully qualified Domain Name for the user, regardless of access level, so at the very least 'cn=Manager,dc=example,dc=com'.</p> <p>For other accounts the user BaseDN is required. Users logging in need only enter their login name, it is assumed the login name will be unique across the entire directory.</p> |
| <i>Password</i>    | If a User account is specified in the User name field, enter the account password.   |
| <i>BaseDN</i>      | <p><i>The Base Domain Name refers to the domain location of the User Groups. For example, assume that the location of the User Groups is the following:</i></p> <p><code>ou=UserGroups,ou=MIS,dc=myoffice,dc=mycompany,dc=com</code></p> <p>The above String would be the BaseDN.</p>  |
| <i>Locale</i>      |  |
| Default Timezone   | Select the default Timezone to be applied to all User accounts imported using the authentication server.   |

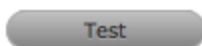
---

7. Enter all required fields to configure the Directory Server



The image shows a dialog box titled "LDAP / Active Directory Setup". It has four tabs: "Server", "Advanced", "SSO", and "Social". The "Server" tab is selected. The "Server" section contains a dropdown menu for "Type" set to "LDAP Server Authentication". The "Settings" section includes a "Security" dropdown set to "Cleartext - Username + Password", a "Server Host" text field containing "127.0.0.1", a "Server Port" text field containing "389", empty "Username" and "Password" text fields, and a "Base DN" text field containing "ou=People,dc=MY-DOMAIN,dc" with a note "(e.g. ou=Groups,DC=example,DC=com)". Below these are two radio button options: "Include Customers" (Yes selected) and "Mixed Mode" (No selected). The "Locale" section has a "Default Timezone" dropdown. At the bottom are four buttons: "Test", "Sync", "Cancel", and "Save".

Test Button



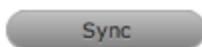
The Test button will create a connection to the LDAP Server using the configuration settings. If successful, it will attempt to determine how many Users are in the top level of each group and display a Results screen.

---

**NOTE:** If the test fails, an error message will display the cause.

---

## Synch Button



The Synchronization button runs the synchronization process manually. It is most useful for the initial deployment, and when new directory server accounts have been created for Users who require immediate access to the system.

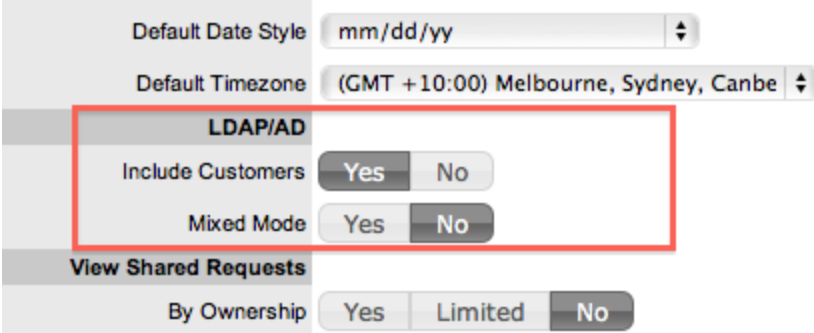
If using Certificates ensure the certificate details are entered in the Certificates tab before synchronizing.

Only one synchronization can run at a time. For multiple users needing access, create the accounts on the LDAP server then run a single manual synchronization.

A manual synchronization may take some time as it depends on the connection speed with the external service. The manual synchronization works best for small directories, as larger directories take more time to propagate changes.

## Importing Customer Details

Customer details can be imported using LDAP by enabling the option, if required. When the system is setup to synchronize with LDAP, move to the Setup>Privileges>Customer tab and enable the Include Customers option.



The screenshot shows a configuration window for LDAP/AD. At the top, there are two dropdown menus: 'Default Date Style' set to 'mm/dd/yy' and 'Default Timezone' set to '(GMT +10:00) Melbourne, Sydney, Canbe'. Below these is a section titled 'LDAP/AD' which is highlighted with a red box. Inside this section, there are two rows of radio button options: 'Include Customers' with 'Yes' selected and 'No' unselected, and 'Mixed Mode' with 'Yes' selected and 'No' unselected. Below the 'LDAP/AD' section is a section titled 'View Shared Requests' with a 'By Ownership' dropdown menu set to 'No'.

If there is a need to create Customers using LDAP and the system's internal authentication capability, Mixed Mode authentication can also be enabled. After the option to Include Customers is set to Yes in the Customer Privilege tab, the Mixed Mode field is displayed. Set this option to Yes to allow Customers to be created directly in the system and using LDAP.

### 5.9.4 LDAP/Active Directory Advanced Settings

Before setting up the LDAP/ADS configuration within the system, the Advanced settings should be revised. The default setup assumes that the User Groups that the system uses to authenticate match what is on the server, and that the User information imported matches the attributes available on the server.

#### LDAP/Active Directory Advanced Options Set-up

To configure the Advanced options within the LDAP/Active Directory Setup window:

1. Select Setup>Authentication
  - The LDAP /Active Directory Setup screen appears.
2. Click Edit
3. Move to the Advanced tab of the selected Authentication Server

**LDAP Advanced Setup**

Server    **Advanced**

[Revert to defaults](#)

| Update Schedule    |                |
|--------------------|----------------|
| Interval           | Weekly         |
| Commencement Time  | Sun @ 0:00     |
| User Groups        |                |
| Administrator Role | Administrators |
| Supervisor Role    | Supervisors    |
| Technician Role    | Technicians    |
| Partner Role       | Partners       |
| Manager Role       | Managers       |
| Finance Role       | Finance        |
| Customer Role      | Customers      |

| Attribute Mapping |   |
|-------------------|---|
| First Name        | Standard <input checked="" type="radio"/> Custom <input type="radio"/><br>givenName       |
| Last Name         | Standard <input checked="" type="radio"/> Custom <input type="radio"/><br>sn              |
| Primary Email     | Standard <input checked="" type="radio"/> Custom <input type="radio"/><br>mail            |
| Email Alias       | Standard <input checked="" type="radio"/> Custom <input type="radio"/><br>mail            |
| Phone             | Standard <input checked="" type="radio"/> Custom <input type="radio"/><br>telephoneNumber |
| Mobile            | Standard <input checked="" type="radio"/> Custom <input type="radio"/><br>mobile          |

4. Enter the relevant details for the fields, as required



5.

| Field                     | Description   |
|---------------------------|---|
| <i>Revert to Defaults</i> | <i>Resets the installation defaults.</i>  |
| <i>Update Schedule</i>    | <i>Sets a routine synchronization to update the system with current AD/LDAP accounts. Select the required Daily, Weekly or Monthly intervals and Commencement details.</i>  |
| Commencement Time         | <i>Set the day of the week and time the system is to start automatically synchronizing with the directory server.</i>   |
| <i>User Groups</i>        | <p>Provides imported Users Roles. (The system will look for these groups by default)</p> <p>The User Group names can be customized, only requiring a unique name for each group. The group names on the Directory Server must be identical to the User Group names entered here. Customize or use the default User Group names as necessary.</p> <p>Members of each group will be assigned the appropriate Role within the system. To assign multiple Roles to a User, make sure they are members of each of the required groups.</p> <p>Users can have only one of the <a href="#">Supervisor</a>, <a href="#">Technician</a> or <a href="#">Partner Roles</a> but they can also have any other Role or combination of Roles.</p>  |
| Attribute Mapping         | <p>Maps attributes from the directory server to corresponding fields in the system. Native system fields are First Name, Last Name, Email (A unique Email Address must be included for a User account to be created), Phone, Mobile, Pager, Address, City, Zip and Country.</p> <p><b>NOTE:</b> Mandatory User information for new and existing User accounts include the First Name, Last Name and Email address. If these details are not available, the application will not validate an existing User account and automatically reassign any open or active requests to another valid User.</p> <p><i>Standard:</i>Next to each field is a drop-down menu containing the list of default fields specific to either LDAP or ActiveDirectory server type. For each native name, the default fields are selected. Use the default mapping or select the mapping attribute as required.</p> <p>Custom: Select the Custom option to manually enter an Attribute Field.</p> |

| Field                                    | Description   |
|--|---|
| GUID                                     | <p>Global Unique Identifier</p> <p>For ADS select objectGUID</p> <p>For OpenLDAP select entryUUID</p> <p>For eDirectory select GUID.</p>  |
| LDAP User fields/ Mixed Mode User Fields | <p>The LDAP User field headings will be replaced with any custom LDAP/ADS Accounts fields created by the Administrator in Setup&gt;Custom Fields ( See <a href="#">Custom Fields</a>.), or Mixed Mode User Fields if the Mixed Mode option is enabled in the Server tab.</p> <p>Use the drop-down list to select the appropriate mapping to the matching directory server field or select Custom to manually enter a Field.</p> |
| Customer Orgs                            | <p>Organizational Unit relationships can also be mapped from the authentication server. By default this is not enabled. To activate Customer Organizational Unit mapping, select Yes for the Import Customer Organizational Units option and define where the Company and Department information is to be derived.</p>  |
| Line Managers                            | <p>LDAP attribute that defines a Customer's line manager, which is used for processing approvals on Service and Change Requests. Only system users with the Customer Role can be assigned as Line Managers.</p>   |

6. Click Save.

## Mapping Fields to the Matching Directory Server Field

The LDAP User field headings will be replaced with any custom LDAP/ADS fields created by the Administrator in Setup>Custom Fields. See [Custom Fields](#). Use the drop-down list to select the appropriate mapping to the matching directory server field or select Custom to manually enter a Field.

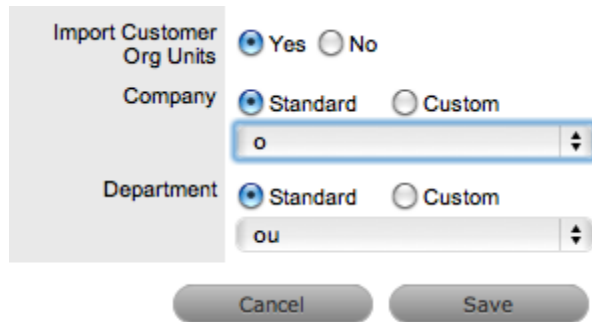
LDAP User field 1  Standard  Custom

LDAP User field 2  Standard  Custom

User details are imported when synchronization with the Active Directory/LDAP server takes place. Imported fields cannot be modified through the service management tool directly, the appropriate authentication server console must be used.

## Import Customer Org Units

Organizational Unit relationships can also be mapped from the authentication server. By default this is not enabled. To activate Customer Organizational Unit mapping, select Yes for the Import Customer Organizational Units option.



Import Customer Org Units  Yes  No

Company  Standard  Custom  
o

Department  Standard  Custom  
ou

Cancel Save

---

**NOTE:** The details of the Org. Units are not populated upon this synch, only the Org. Unit names.

For the Org. Unit details to be assigned to Customer or User Information, create the Org. Unit in the Supervisor>User>Organizational Units tab and ensure the Org. Unit name is identical to what is stored in the authentication server. If the details are not identical, the system will create another Org. Unit.

---

## 5.10 SSO

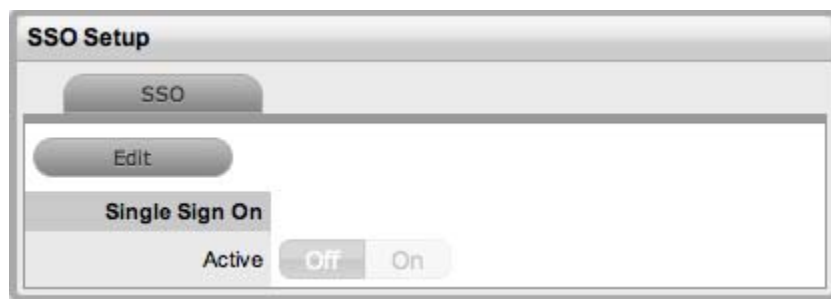
### 5.10.1 Single Sign On

Single sign on (SSO) options are provided for organizations using request header based, single sign-on technologies such as JOSSO, Shibboleth or Site Minder. These work best with directory server technologies, as they keep the account details synchronized. It should be noted that some of these technologies rely on application server redirects to be implemented, so Administrators are advised to check the documentation of their SSO provider for details on how to activate and use request header based Single Sign On.

When configured, SSO allows Customers and Users who have logged onto their networks using their directory server authentication credentials, to automatically access the service management application without re-entering their login details.

To configure SSO:

1. Select Setup>SSO



SSO Setup

SSO


Edit

Single Sign On

Active Off On

2. Click Edit
3. Toggle On

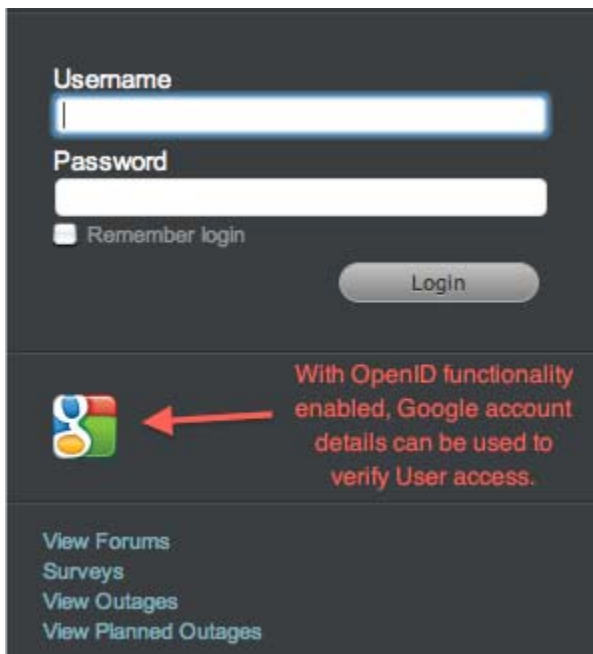
4. Complete all fields
- 5.

| Fields            | Description  |
|-------------------|--|
| <i>Session ID</i> | Enter the name of the HTTP Header that contains the SSO session id. All the Headers can be viewed by clicking  . |
| <i>Username</i>   | Enter the name of the HTTP Header that will contain the Login of the User attempting to access the support system.   |
| <i>Email</i>      | Enter the name of the HTTP Header that will contain the email address of the User attempting to access the support system.   |

6. To view all Session Headers click .
7. Select Save.

## 5.10.2 Social

The Social tab is available when the OpenID Consumer option is enabled within the Setup>Privileges>System tab. This functionality delegates the authentication of Customers and Users when accessing the system to OpenID Providers. Users and Customers with accounts with OpenID Providers recorded in the system can invoke the functionality by clicking the appropriate icon displayed on the system Log in page.



Within the Social tab, the OpenID Providers that are to be used to verify the online identity of Customers and Users accessing the system are configured. By default the system includes the details for Google and Yahoo, which can be enabled by opening the relevant link and selecting Yes.

## Enabling Default Providers

To use the default OpenID Provider options of Google or Yahoo to authenticate Customer and User access:

1. Select Setup > SSO > Social tab



2. Click the URL Name of the relevant Provider
3. Select Edit
4. Toggle the Enable option to Yes

5. Click Save.

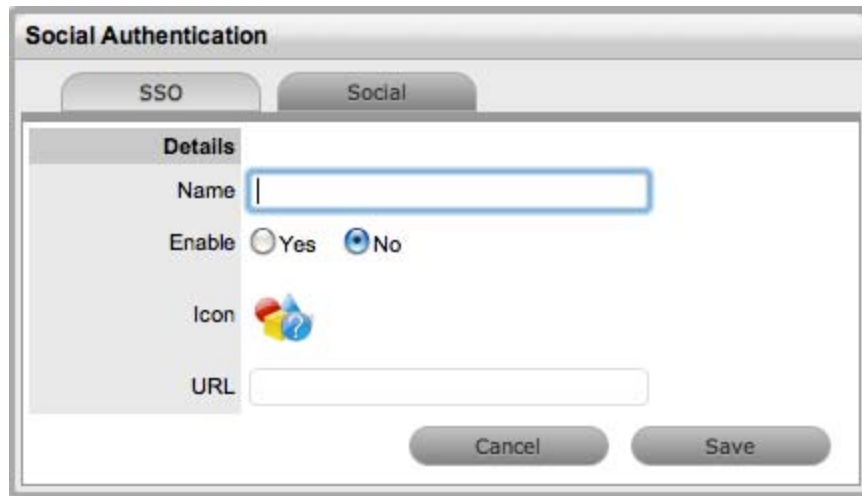
The Open ID Provider icon will now be visible on the system Login page.

To remove the system default OpenID Provider list options, follow the above steps, but select the Delete button within the Details view of the OpenID Provider.


## Defining an OpenID Provider

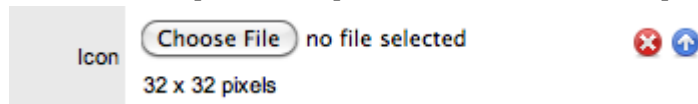
To enter the account details for an OpenID Provider:

1. Select Setup > SSO > Social tab
2. Click New




The screenshot shows a window titled "Social Authentication" with two tabs: "SSO" and "Social". The "Social" tab is active. Under the "Details" section, there are four fields: "Name" (a text input field), "Enable" (radio buttons for "Yes" and "No", with "No" selected), "Icon" (a small icon of a globe with a question mark), and "URL" (a text input field). At the bottom of the window are "Cancel" and "Save" buttons.

3. Complete the Name field
4. Select Yes to enable the Provider to authenticate Users and Customers
5. Click  to upload the OpenID's icon that will be displayed on the system Log in page



The screenshot shows a file selection interface. On the left, there is a label "Icon" next to a small icon placeholder. To the right, there is a "Choose File" button, followed by the text "no file selected". Below this, it says "32 x 32 pixels". To the right of the text are two icons: a red "X" and a blue "up" arrow.

6. Click Choose File to search for the image file  
The image must be 32x32 pixels.
7. Click  to upload
8. Define the URL details for the OpenID Provider
9. Click Save.

The icon for the OpenID Provider will now be active on the system Log in page.

## 5.11 Reports

### 5.11.1 Schedule Reports

Schedule Reports allow the Administrator to configure the system to automatically send reports via email to Supervisor, Technician, Finance, Partner and Manager Users on a regular basis. The content of the email is defined on a per Role basis with the reports drawn from the default system reports or those built using the system report builder.

#### Setting Up Scheduled Reports

To set up scheduled reports:

1. Select Setup>Reports





2. Select the relevant Role link

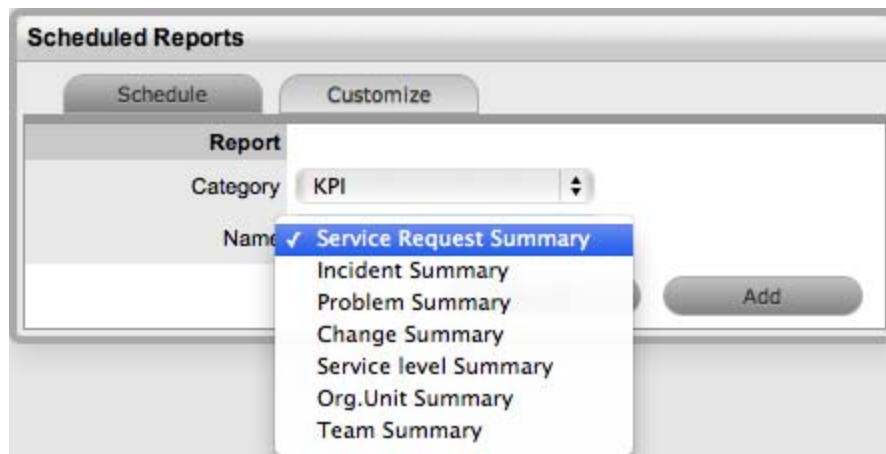
The screen defaults to the Details screen.

3. Click Yes within the Active field

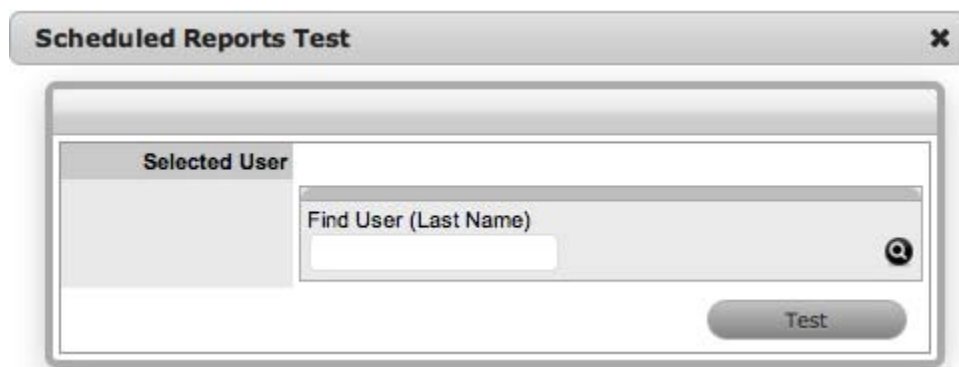
Scheduled reports are enabled for all Users of selected Role.

| Email   | Description   |
|---|---|
| Send  | Define if the automated reports are to be sent Daily, Weekly or Monthly.                          |
| Time  | Using the 24 hour clock, set what time of day the report is to be emailed to the User Role group. |
| Content   |   |
| Date Range  | Set the number of previous days, weeks or months that the report is to be calculated over.        |
| Page Size   | Nominate A4, Legal or Letter as the page format size for the report.                              |
| Selected Reports  |   |
|  | Add or remove reports in this section.  |

4. Complete the Email details  
Nominate the frequency and time of day the reports are to be sent.
5. Complete the Date Range for the emailed reports  
The Date Range intervals include daily, weekly and monthly. Define the number and interval type for sending the reports.
6. Set the paper size
7. Click  to add reports to the schedule  
The screen defaults to the display Category and Name drop down lists.
8. Select the Report Category  
The Name list is refined based on the Category selected. For example, if KPI is set as the Report Category the Names list includes all types of KPI summary reports included by default in the system.



9. Define the report Name and any other required options  
Based on the Report Name selected, the options to create a trend report or define the results by specific parameters (i.e., Customer Name, Item Type, etc) are displayed.
10. Click Add  
Repeats steps 7 to 10 to associate all the required reports with the scheduled reports email.
11. Select Test, if required



12. Search and select the User who is to receive the test report
13. Click Test



A test copy of the report is sent to the defined User with the test interval range based on *one* day, week or month, not the actual number defined in the Previous field for the scheduled reporting period.

14. Click Save.

Repeat the above process for all relevant User Roles.

## 5.11.2 Customize Reports

The Customize tab displays a list of sample customized reports that have been created within Pentaho and made available for publication within the Supervisor>Reports>Customize tab. These default customized reports can be deleted, if required. Alternatively, more reports can be imported for publication within the support system using the Customize tab.

For more information about creating customized reports using Pentaho, see [Creating Custom Reports](#).

### Importing Reports

Using the ZIP files exported from Pentaho, to import the customized reports:

1. Select Setup>Reports
2. Click Import



3. Select Choose File to search and select the Zip file to be imported
4. Click Upload



5. Click Import.

## Deleting Reports

To remove custom reports from the system:

1. Select Setup>Reports
2. Check the report in the list to be removed



3. Click Delete.

### 5.11.3 Creating Custom Reports

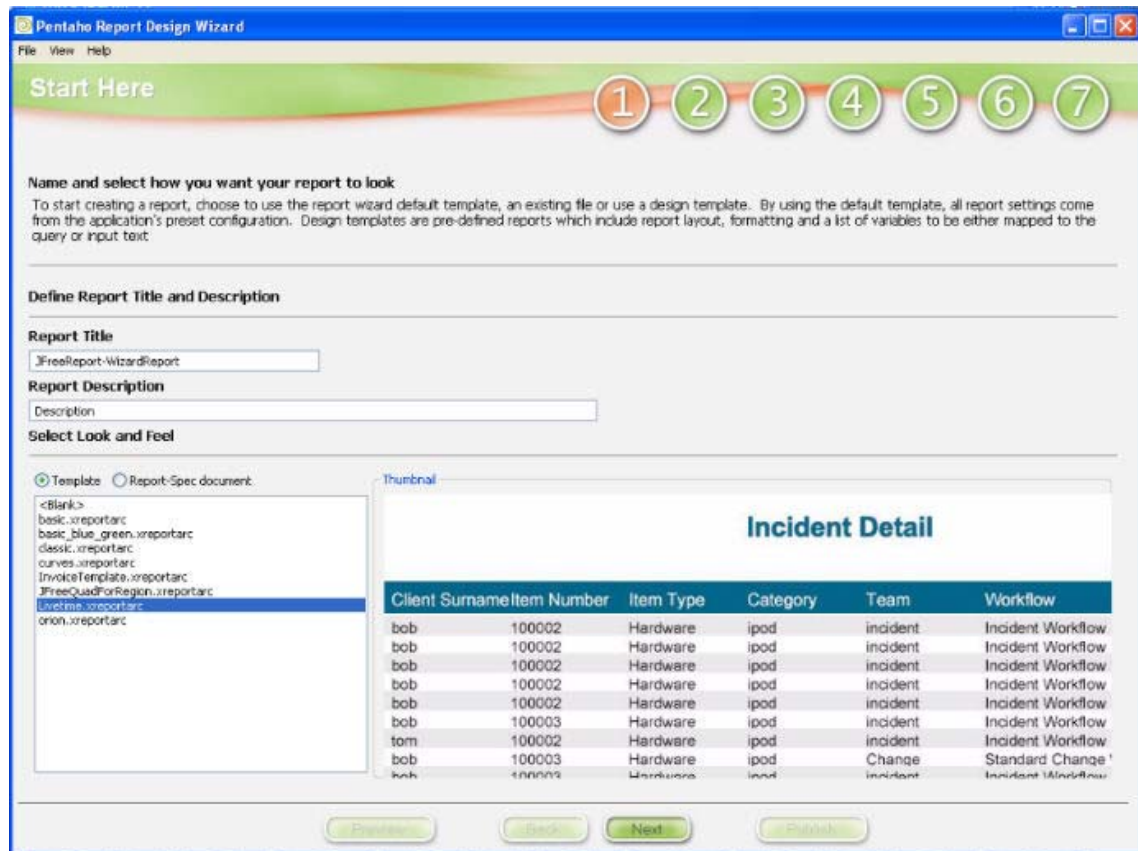
To provide Users with access to service management data that is meaningful to their organization, the reporting capability of the system has been extended through the integration with Pentaho Design Wizard. Pentaho allows Users to create customized reports relevant to their organizational requirements that are published in the Reports tab .

## Creating a Custom Report - Example

To create a report using Pentaho Report Design Wizard:

1. Start Pentaho Report Design Wizard
2. Enter a Title and Description for the report
3. Select a Template

For this example, LiveTime.xreportarc is selected. This template is available from system support and can be supplied on request.



4. Click Next
5. Enter Database Connection information  
Select the Connection Type: JNDI.
6. Click Add

The Add JNDI Connection page appears.

**NOTE:** It is important to note that the appropriate JDBC driver must be added in order to connect to the database. To add the driver go to

<Design\_Wizard\_Home>\Jfree\designwizard\lib\jdbc .

7. Enter database connection details, click Test to confirm the connection



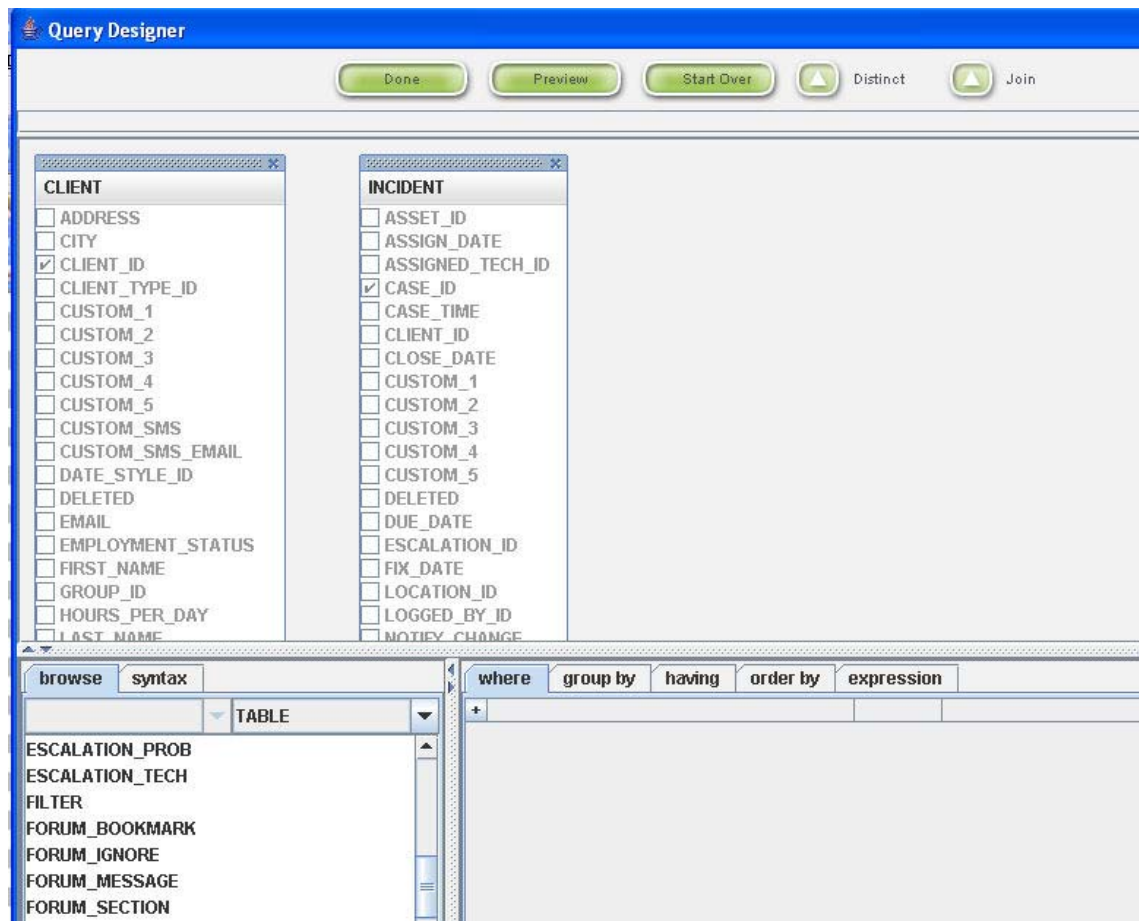
8. Click OK
9. Select the Query Designer button to open the Query Designer window (ensure that the database is selected first)  
Alternatively, enter a query in the text area provided.

---

**NOTE:** For a description of the system schema please contact [support@livetime.com](mailto:support@livetime.com) for a current Entity-Relationship Diagram.

---

10. Create a query as desired



11. Click Done when complete

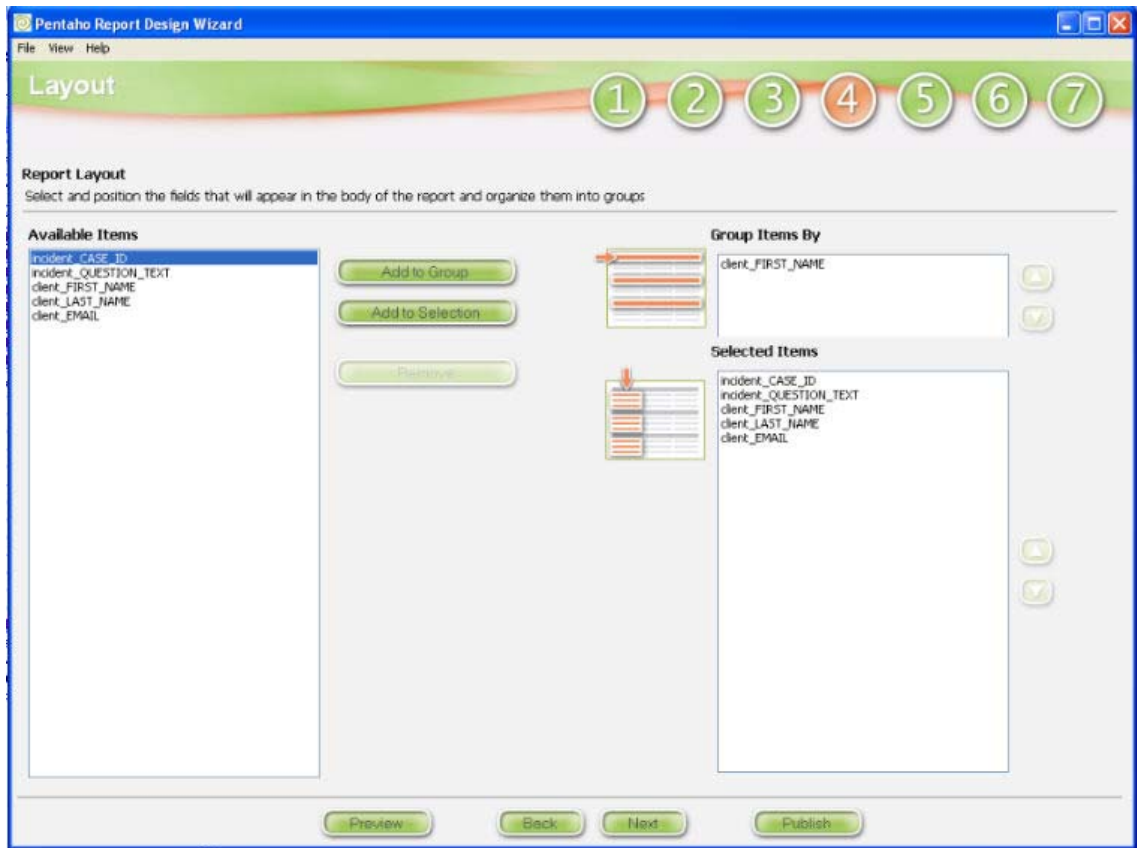
The Query String will be displayed.

12. Click Next

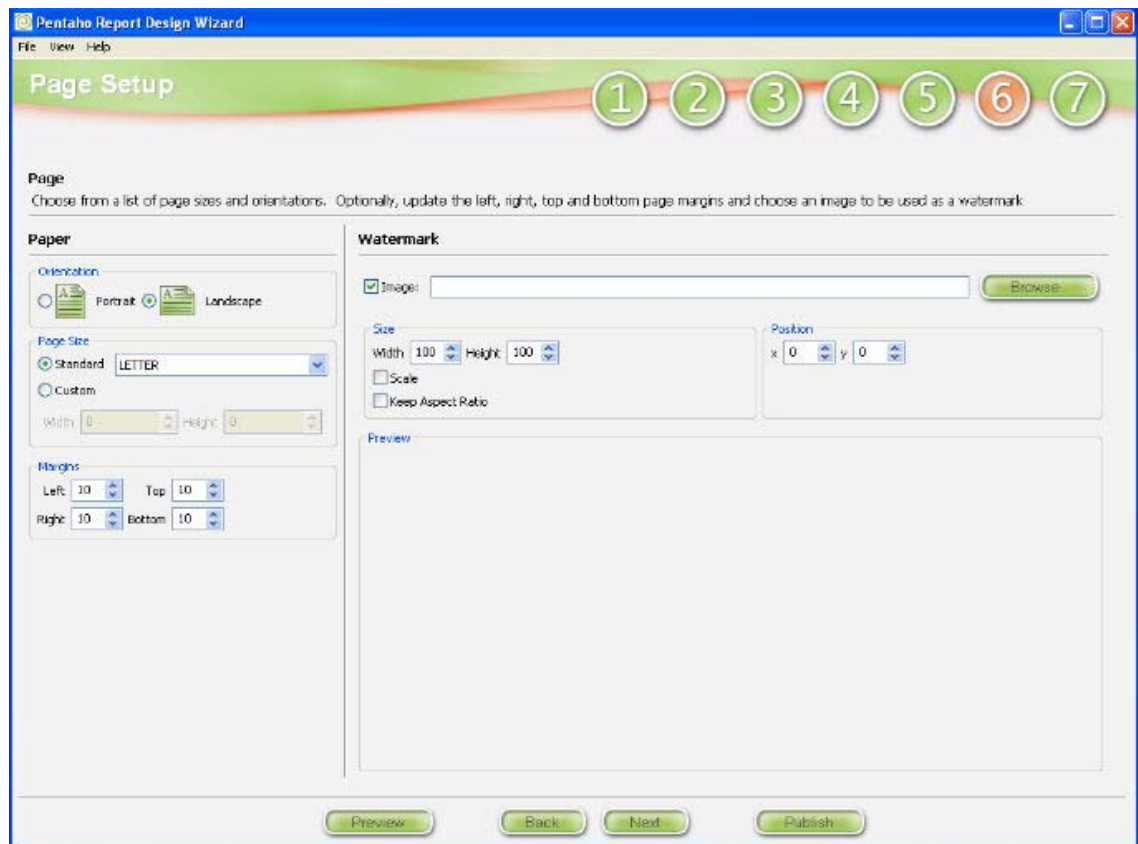
13. Replace any variables within the template. For example, rename the Report Title, Page Headers and Footers

Select the Property to Map, then modify the property by selecting the Custom Value or Column options where relevant.





16. Click Next
17. Set the formatting and group computations  
These include options such as SUM, AVG, MIN and MAX.
18. Select and update the display name for each field
19. Click Next
20. Configure the page layout  
The options include orientation, margins or add a watermark.



21. Click Next
22. Add to the report by configuring a chart or grand total
23. Modify column sizes or fonts
24. Click Publish.

## Publishing a Report

For a newly created report to be available within the Reports tab of the service management application, it must be published.

To publish a Report:

1. Open a report within the Pentaho Report Design Wizard
2. Click the Publish button  
The Publish Report to Server screen is displayed.
3. Select Publish To: Location





4. Enter a Name for the published report
5. Update the Publish Location to Desktop or on your local disk
6. Click OK
7. Locate the files and zip them into a single archive.

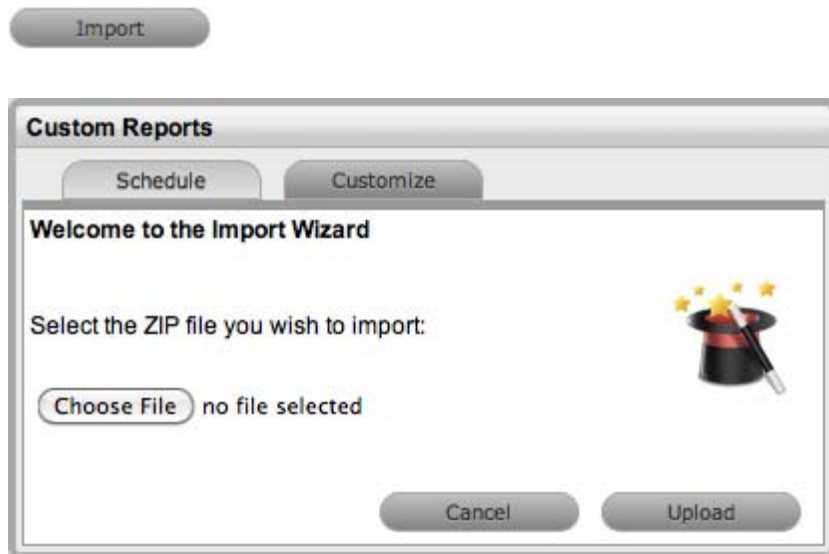
## Customize

The Customized tab displays a list of sample customized reports that have been created within Pentaho and made available for publication within the Supervisor>Reports>Customize tab. These default customized reports can be deleted, if required. Alternatively, more reports can be imported for publication within the support system using the Customize tab.

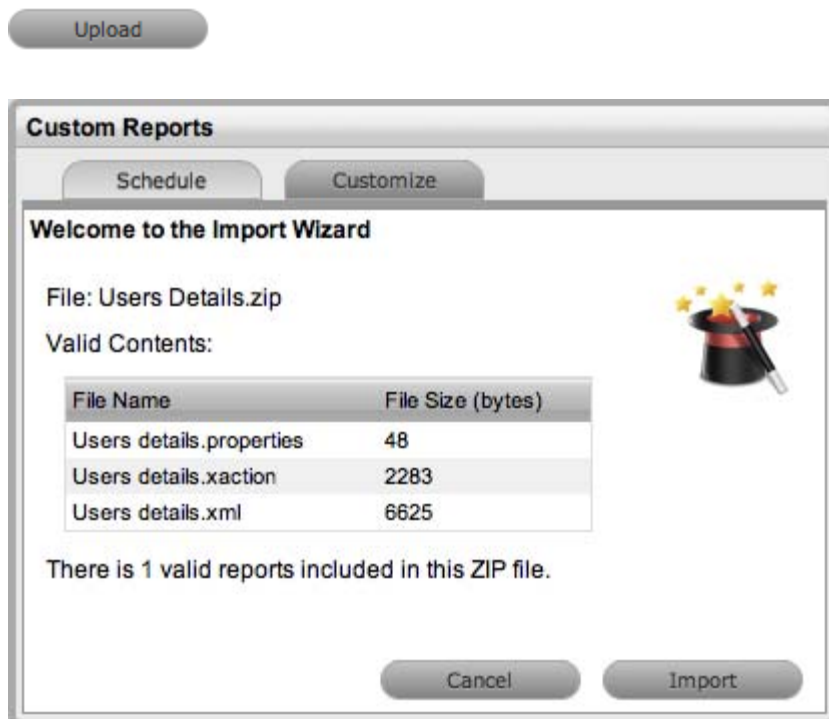
## Importing Reports

Using the ZIP files exported from Pentaho, to import the customized reports:

1. Select Setup>Reports
2. Click



3. Select Choose File to search and select the Zip file to be imported
4. Click



5. Click  .

## Sample Reports

A number of sample reports are included with the system, which can be accessed by the system Administrator in Admin>Setup>Reports>Customize tab.

## Deleting Reports

To remove custom reports from the system:

1. Select Setup>Reports
2. Check the report in the list to be removed



3. Click  .

---

**NOTE:** For more information about configuring Pentaho and customizing parameters, see the following Articles in the support Knowledge Base:

- ♦ Enhancing LiveTime Custom Reports
  - ♦ Creating Custom Reports within LiveTime.
- 

## 5.12 Billing

### 5.12.1 Billing

The Billing module allows Users to create Invoices, Purchase Orders and manage Customer support Contracts. Billing allows support organizations to charge Customers for support services provided, and manage Items purchased with Service Contracts.

When the Billing module is enabled by the system administrator, the Invoices and Purchase Orders sub-menu options are available within the application Finance tab. Purchase orders can simplify the tracking of where and when new Items are purchased or leased. This feature is not meant to replace an organization's original PO system, it is designed to easily link a specific PO number (and its associated vendor and date information) with an Item.

The Invoices section allows Customers to be billed for products (Items) or support services (Contracts) provided by the organization. An Invoice can be created when an Item and Service Contract is ordered by a Customer. Alternatively, Invoices can be created for Service Contracts alone, as the Item may already exist in the system.

Invoices can be generated through the following screens:

- ♦ Within the Invoices section
- ♦ When a request is created against an out-of-contract Item
- ♦ When an Item, Customer or Organizational Unit is created, or edited to assign a new SLA.

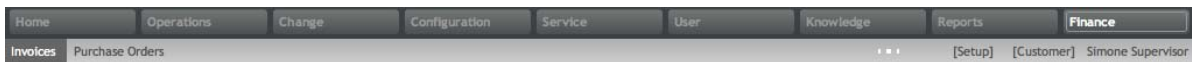
The Billing options include:

- ◆ [Purchase Orders](#)
- ◆ [Contracts](#)
- ◆ [Invoices](#).

| Billing             | Description  |
|---------------------|--|
| Purchase Orders     | Allow Users to track Items from the moment an order is placed to its delivery and implementation. POs cover leased and purchased Items.  |
| Contracts           | Within Contracts, Users can manage Customer Service agreements over a specific time period.  |
| Invoices            | Allow Users to charge Customers for contracts. When Invoices are activated, Contracts are automatically enabled  |
| Display SLA Prices  | Enables SLA Price fields to be visible in the SLA Editor screen. This allows the Supervisor to allocate costs to SLAs and assists with the calculation of Break Even Point costs for Service Items.<br><br>See: <a href="#">SLAs</a> . |
| Email Notifications | (This option is visible when Contracts are enabled.)<br><br>Enables the system to update Finance Users via automated emails, regarding Invoice and/or Contract related matters.  |
| Global Settings     |  |
| Currency            | Defines the currency that is to be automatically applied by the system for all financial transactions.   |

**NOTE:** Invoices and Contracts will not work when Global Items are in use. If Billing is enabled after the application has been in use, a Supervisor will need to assign owners to Global Items before Billing can be activated.

## 5.12.2 Invoices



The Invoices sub-menu option is available within the Finance tab when the option has been enabled by the system administrator. Invoices allows support organizations to charge Customers for support services provided, and manage Items purchased with Service Contracts.

(For more information about enabling Billing, see: Setup>Billing within the Administrator Guide.)

An Invoice can be created when an Item and Service Contract is ordered by a Customer. Alternatively, Invoices can be created for Service Contracts alone, as the Item may already exist in the system.

Invoices can be generated by the system through the following screens:

- ◆ Within the Invoices section
- ◆ When an Incident is created against an out-of-contract Item
- ◆ When an Item, Customer or Organizational Unit is created, or edited to assign a new SLA.

The following sections are covered within Invoices:

- ◆ [Invoice creation](#) - creating an invoice for a Service Contract or an Item with a Service Contract
- ◆ [Invoice summary screen](#) - Summary tabs, emailing and editing an Invoice, and information about an Invoice Status
- ◆ [Invoice payment and delivery](#) - processing an Invoice when payment is required.

### 5.12.3 Creating Invoices

Invoices can be created for Items and associated service Contracts, and for Items or Service Contracts only.

#### Creating an Invoice to purchase an Item and Service Contract

To create an Invoice:

1. Select Finance>Invoices
2. Click New

The Customer tab appears.

3. To assign a Customer to the Invoice:

- a. Search for a Customer who already exists in the system

Enter any known information such as their First Name, Last Name, Email Address, Org. Unit or Username in the Find Customer fields. To view a list of all Customers in the database, leave all the fields blank.

The screenshot shows the 'Invoice Editor' window with four tabs: 'Customer', 'Items', 'Contract', and 'Summary'. The 'Customer' tab is active. On the left, there is a 'Contact' list with fields: Name, Email, Phone, Fax, Pager, Mobile, Org. Unit, Address 1, Address 2, City, State, Zip, and Country. Below this is a 'Delivery Details' section with a checked checkbox for 'Use Customer Details'. On the right, there is a 'Find Customer' search form with fields for First Name, Email, Last Name, Phone, Username, and Org. Unit. A magnifying glass icon is located at the bottom right of the search form. At the bottom of the window are 'Cancel' and 'Next' buttons.

- b. Click 

- c. Click on a Customer's name to assign them to the Invoice

The Delivery Details are automatically extracted from the Customer Details. If they are not the same, uncheck by clicking the tick in the Use Customer Details box and enter the correct details.

- d. Select Next to continue.

The system moves to the Items tab.

- 4. To add an Item Type for an Item Order:

- a. Select **Add** if the Invoice is to purchase a new Item

Otherwise, click Next to purchase a Service Contract.

- b. Search for the Item Type to be associated with the Invoice

Leave the search field blank and click the Search button to display a list of Item Types that can be assigned to the Invoice

- c. Select the relevant Item Type link to add it to the Invoice

The screenshot shows the 'Invoice Editor' window with the 'Items' tab selected. The 'Item Type' is 'Nokia 3720'. The 'Unit Price' is '\$0.00'. The 'Actual Price' is '0.00'. The 'Units' is '1'. The 'Taxable' checkbox is unchecked. There are 'Cancel' and 'Save' buttons at the bottom right. Below the form is a table header with columns: Item Type, Item #, Unit Price, Actual Price, Units, Taxable, and Total Price. The table currently shows '0 - 0 of 0 Results'.

- d. Enter the Actual Price information, if relevant and the number of Units to be ordered

- e. Mark the order as Taxable if required

The tax is not included in the Actual Price but will be calculated within the Invoice Summary tab.

- f. Click Save to add

The Item Type details are applied to the Invoice

The screenshot shows the 'Invoice Editor' window with the 'Items' tab selected. The table now contains one row: 'Nokia 3720' with 'TBA' as the Item #, '\$0.00' as the Unit Price, '\$990.00' as the Actual Price, '2' as the Units, and a checked 'Taxable' checkbox. The 'Total Price' is '\$1,980.00'. There are 'Delete', 'Add', 'Cancel', and 'Next' buttons at the bottom. The table shows '1 - 1 of 1 Results'.

- g. To add more Item Types, select **Add** and repeat the above process.  
Alternatively, click Next to move to the Contract tab, if required.
5. To add a Service Contract for a newly ordered Item Type:
- Select **Add** to add a Service Contract to the Invoice  
Or, click Next to go to the Invoice summary.
  - Select the appropriate SLA from the drop-down options
  - Select the Item Type related to the Service Contract  
To search for an Item Type enter any known details in the Find Item Type search field.
  - Click the Item Type link to assign it to the Invoice


The screenshot shows the 'Invoice Editor' window with the 'Contract' tab selected. The form contains the following fields and values:

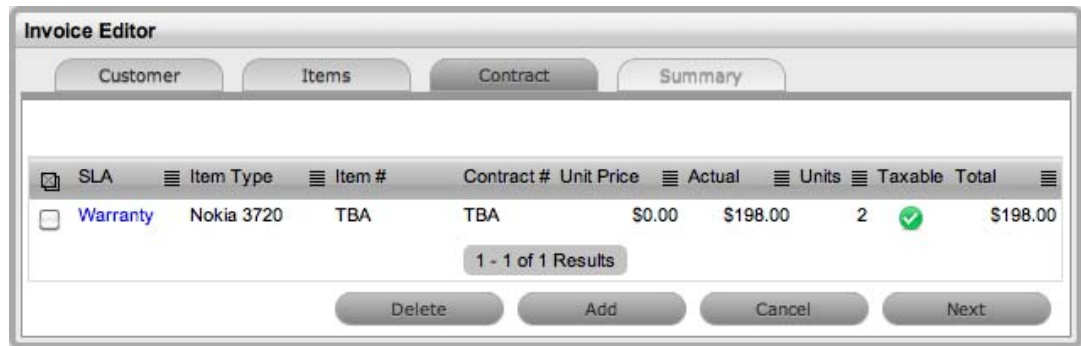
- SLA: Warranty
- Item Type: Nokia 3720
- SLA Price: \$0.00 per Annum
- Actual: 198
- Units: 1
- Taxable:
- Time: Subscription
- Start Date: 07/06/11 10:29
- End Date: 06/06/12 23:59

Buttons for 'Cancel' and 'Save' are located at the bottom right of the form area. Below the form is a table header with columns: SLA, Item Type, Item #, Contract #, Unit Price, Actual, Units, Taxable, Total. Below the table header, it displays '0 - 0 of 0 Results'.

- Amend the Actual Price, if relevant
- Check the Contract as taxable, if relevant
- Select the Time period covered by the Contract:
  - Subscription* - a contract that covers a specified period of time
  - Time Limited Subscription* - a contract that covers either a specified period of time or number of support hours, whichever limit is reached first
  - Support Hours* - a contract that defines the number of support hours covered
  - Support Hours by Month* - a contract that covers a total number of support hours purchased for a defined timeframe and allocated on a per month basis.
- Click Save.

i. To add another contract to the Invoice, click

 and repeat the above process.



6. Click Next to move onto the Summary page



**Invoice Editor**

Customer    Items    Contract    Summary

**Invoice # 100015**

---

**Customer Details**

Name Andrea Scotchmore  
 Org. Unit Windy City Enterprises  
 Address 1 Level 8  
 Address 2 1 Autumn Road  
 City Sydney  
 State Victoria  
 Zip 2000  
 Country Australia

**Delivery Details**

First Name Andrea  
 Last Name Scotchmore  
 Address 1 Level 8  
 Address 2 1 Autumn Road  
 City Sydney  
 State Victoria  
 Zip 2000  
 Country Australia

---

**Order Details**

PO Number

Order Date 07/06/11 10:29

Invoice Date 07/06/11 10:29

Due Date 07/07/11 00:00

Entered By Simone Supervisor

Processed By

**Status**

Invoice Status Pending  
 Delivery Status Undelivered  
 Payment Status Pending Unpaid  
 Payment Date  
 Shipping Date 07/06/11 10:29

Tracking Number

---

**Line Items**

Items

| Item Type  | Actual Price | Units | Taxable | Total Price |
|------------|--------------|-------|---------|-------------|
| Nokia 3720 | \$990.00     | 2     | ✓       | \$1,980.00  |
| Subtotal   |              |       |         | \$1,980.00  |

Contracts

| SLA      | Item Type  | Actual Price | Units | Taxable  | Total Price |
|----------|------------|--------------|-------|----------|-------------|
| Warranty | Nokia 3720 | \$198.00     | 2     | ✓        | \$198.00    |
| Subtotal |            |              |       | \$198.00 |             |

Apply Terms

Notes

**Costs**

Line Items Total \$2,178.00

Shipping

Tax \$217.80 (@ 10.00 %)

Adjustment

**Total**

7. Enter a PO Number and make any other adjustments, if relevant
8. Click Save
9. Select  to send the Invoice to the Customer, if required
10. Click Done.

## Creating an Invoice to Purchase a Service Contract

To create a Service Contract Invoice:

1. Select Finance>Invoices
2. Click New

The Customer tab appears.

3. To assign a Customer to the Invoice:

- a. To search for a Customer who already exists in the system

Enter any known information such as their First Name, Last Name, Email Address, Org. Unit or Username in the Find Customer fields. To view a list of all Customers in the database, leave all the fields blank.

The screenshot shows the 'Invoice Editor' window with the 'Customer' tab selected. On the left, there is a list of fields for customer details: Name, Email, Phone, Fax, Pager, Mobile, Org. Unit, Address 1, Address 2, City, State, Zip, and Country. Below this list is the 'Delivery Details' section with a checked box for 'Use Customer Details'. On the right, there is a 'Find Customer' search panel with input fields for First Name, Email, Last Name, Phone, Username, and Org. Unit. A magnifying glass icon is located at the bottom right of the search panel. At the bottom of the window are 'Cancel' and 'Next' buttons.

- b. Click 

- c. Click on a Customer's name to assign them to the Invoice

The Delivery Details are automatically extracted from the Customer Details. If they are not the same, uncheck by clicking the tick in the Use Customer Details box and enter the correct details.

- d. Select Next

The system moves to the Items tab and displays the following message

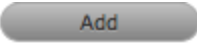
The message box has a blue border and a magnifying glass icon on the left. The text inside reads: 'Information' followed by a horizontal line and 'Select Add to add an Item or Next to create a contract'.

- e. Click Next again

The system moves to the Contract tab.

The screenshot shows the 'Information' section with a blue information icon and the text 'Select Add to create a contract'. Below it is the 'Invoice Editor' window with tabs for 'Customer', 'Items', 'Contract', and 'Summary'. The 'Contract' tab is active, displaying a table with columns: SLA, Contract Type, Name, Contract #, Unit Price, Actual, Units, Hours, Taxable, and Total. The table is currently empty, showing '0 - 0 of 0 Results'. At the bottom of the table are buttons for 'Delete', 'Add', 'Cancel', and 'Next'.

4. To create a Service Contract:

- a. Select  to create the Service Contract
- b. Select the appropriate SLA from the drop-down options

The screenshot shows the 'Invoice Editor' window with the 'Contract' tab active. The 'Contract Type' dropdown menu is open, showing options: 'Select Contract Type...' (highlighted), 'Item Contract', 'Customer Contract', and 'Org Unit Contract'. Other fields include 'SLA' (Standard), 'SLA Price', 'Actual', 'Taxable' (checkbox), 'Time' (Subscription), 'Start Date' (07/06/11 10:42), and 'End Date' (06/06/12 23:59). At the bottom right are 'Cancel' and 'Save' buttons. The table at the bottom shows the same columns as the previous screenshot and is empty.

c. Select the Contract Type

d.

| Contract Type     | Description  |
|-------------------|--|
| Item Contract     | To purchase a contract for an Item. Search and select an Item using the Find Item search.                        |
| Customer Contract | To purchase a contract for a Customer. Search and select a Customer using the Find Customer search.              |
| Org Unit Contract | To purchase a contract for an Organizational Unit. Search and select an Org Unit using the Find Org Unit search. |

e. Amend the Actual Price, if relevant

f. Check the Contract as taxable, if relevant

g. Select the Time period covered by the Contract:

If *Subscription* is selected, the Start and End Dates are automatically completed by the system.

If *Time Limited Subscription* is selected, the Support Hours field is displayed and the number of support hours purchased by the Customer should be entered. Also, the Start Date and End Date fields should be completed manually, entering the length of time for the subscription period.


If *Support Hours* is selected, the number of support hours purchased by the Customers should be entered.

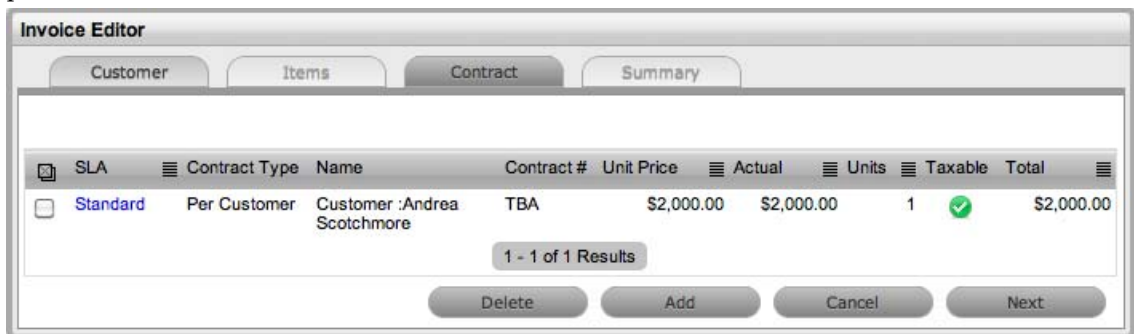
If *Support Hours by Month* is selected, a contract that covers a total number of support hours purchased for a defined timeframe and allocated on a per month basis.

(If a Contract is forward dated with a Start Date set in the future, the Pending Contract status is assigned. See [Pending Contracts.](#))

h. Click Save

5. To add another contract to the Invoice, click

 and repeat the above process.



6. Click Next to move onto the Summary page

7. Make any adjustments, as required

8. Click Save

9. Select  to send the Invoice to the Customer, if required

10. Click Done.

## 5.12.4 Invoice Summary

The Invoice Summary tab includes the invoiced Customer, delivery and order details. It allows Users to email the Invoice to relevant parties and displays the status of the Invoice. The summary screen also allows Finance Users to process an Invoice when payment is received.

The following fields are included with the Invoice Summary tab:

| Fields                        | Description   |
|-------------------------------|---|
| PO Number                     | Auto-generated or manually entered order identification number.   |
| Order Date                    | Auto-generated or manually adjusted order date.   |
| Invoice Date                  | Auto-generated or manually adjusted date for the invoice creation.  |
| Due Date                      | The date the invoice is due. Auto-generated based on the Default Invoice Due value defined by the Administrator.                            |
| Entered By                    | The User who created the invoice.   |
| Processed By                  | The User who processed the invoice.   |
| Invoice Status                | Displays what stage of the order process the invoice is in.   |
| Delivery Status               | Details the status of delivery for items on the invoice   |
| Payment Status                | Details if the invoice has been paid  |
| Payment Date                  | Date the invoice was processed for payment.   |
| Shipping Date                 | Manually entered date of shipping.  |
| Tracking Number               | Reference number manually entered to track the order.   |
| Apply Terms                   | For the system terms and conditions to be included in the PDF Invoice and the Invoice emailed to the Customer, tick the Apply Terms option. |
| Notes                         | Enter any additional Invoice information within the Notes field.  |
| Shipping, Discounts and Taxes | Before saving an Invoice, any shipping costs to be included in the grand Invoice total can be entered in the Shipping field.                |
| Adjustment                    | The Adjustment field records Customer discounts and will be subtracted from the final order total.  |

**NOTE:** A flat tax percentage can be added to taxable line Items included on the Invoice. This is a global property that is configured by the system Administrator, in Setup>Billing>Tax Rate, but can be edited if required.

**Invoice Editor**

Customer    Items    Contract    **Summary**

Edit    PDF    **Invoice # 100015**

| Customer Details |                        | Delivery Details |               |
|------------------|------------------------|------------------|---------------|
| Name             | Andrea Scotchmore      | First Name       | Andrea        |
| Org. Unit        | Windy City Enterprises | Last Name        | Scotchmore    |
| Address 1        | Level 8                | Address 1        | Level 8       |
| Address 2        | 1 Autumn Road          | Address 2        | 1 Autumn Road |
| City             | Sydney                 | City             | Sydney        |
| State            | Victoria               | State            | Victoria      |
| Zip              | 2000                   | Zip              | 2000          |
| Country          | Australia              | Country          | Australia     |

| Order Details |                   | Status          |   |
|---------------|-------------------|-----------------|---|
| PO Number     |                   | Invoice Status  | Pending   |
| Order Date    | 07/06/11 10:29    | Delivery Status | Undelivered <a href="#">Process</a>             |
| Invoice Date  | 07/06/11 10:29    | Payment Status  | Pending Unpaid <a href="#">Payment Received</a> |
| Due Date      | 07/07/11 00:00    | Payment Date    |   |
| Entered By    | Simone Supervisor | Shipping Date   | 07/06/11 10:29                                  |
| Processed By  |                   | Tracking Number |   |

| Line Items |   |              |              |              |             |             |             |          |            |          |            |          |          |          |  |            |  |          |
|------------|---|--------------|--------------|--------------|-------------|-------------|-------------|----------|------------|----------|------------|----------|----------|----------|--|------------|--|----------|
| Items      | <table border="1"> <thead> <tr> <th>Item Type</th> <th>Actual Price</th> <th>Units</th> <th>Taxable</th> <th>Total Price</th> </tr> </thead> <tbody> <tr> <td>Nokia 3720</td> <td>\$990.00</td> <td>2</td> <td>✓</td> <td>\$1,980.00</td> </tr> <tr> <td colspan="4">Subtotal</td> <td>\$1,980.00</td> </tr> </tbody> </table>                            | Item Type    | Actual Price | Units        | Taxable     | Total Price | Nokia 3720  | \$990.00 | 2          | ✓        | \$1,980.00 | Subtotal |          |          |  | \$1,980.00 |  |          |
| Item Type  | Actual Price  | Units        | Taxable      | Total Price  |             |             |             |          |            |          |            |          |          |          |  |            |  |          |
| Nokia 3720 | \$990.00  | 2            | ✓            | \$1,980.00   |             |             |             |          |            |          |            |          |          |          |  |            |  |          |
| Subtotal   |   |              |              | \$1,980.00   |             |             |             |          |            |          |            |          |          |          |  |            |  |          |
| Contracts  | <table border="1"> <thead> <tr> <th>SLA</th> <th>Item Type</th> <th>Actual Price</th> <th>Units</th> <th>Taxable</th> <th>Total Price</th> </tr> </thead> <tbody> <tr> <td>Warranty</td> <td>Nokia 3720</td> <td>\$198.00</td> <td>2</td> <td>✓</td> <td>\$198.00</td> </tr> <tr> <td colspan="4">Subtotal</td> <td>\$198.00</td> </tr> </tbody> </table> | SLA          | Item Type    | Actual Price | Units       | Taxable     | Total Price | Warranty | Nokia 3720 | \$198.00 | 2          | ✓        | \$198.00 | Subtotal |  |            |  | \$198.00 |
| SLA        | Item Type   | Actual Price | Units        | Taxable      | Total Price |             |             |          |            |          |            |          |          |          |  |            |  |          |
| Warranty   | Nokia 3720  | \$198.00     | 2            | ✓            | \$198.00    |             |             |          |            |          |            |          |          |          |  |            |  |          |
| Subtotal   |   |              |              | \$198.00     |             |             |             |          |            |          |            |          |          |          |  |            |  |          |

Apply Terms

Notes

| Costs            |                   |
|------------------|-------------------|
| Line Items Total | \$2,178.00        |
| Shipping         |                   |
| Tax (@ 10.00%)   | \$217.80          |
| Adjustment       | \$0.00            |
| <b>Total</b>     | <b>\$2,395.80</b> |

Email    Done

## Emailing an Invoice

Once an invoice is created, selecting the Email button will send a copy of the Invoice to:

- ♦ The Customer who placed the order
- ♦ The system Finance User
- ♦ The User who recorded the Invoice
- ♦ The Customer who will take delivery, if different to the person who placed the order.

If the system Administrator has enabled the Email Invoice functionality in the application Setup, the Invoice will be emailed automatically to the relevant parties when it is created.

## Invoice Status

When an Invoice is first logged in the system it has a status of Pending. A pending Invoice can be edited. However, when an Invoice has been successfully delivered or processed, the Invoice Status moves to Active and it is no longer editable.

| Status          |                                     |
|-----------------|-------------------------------------|
| Invoice Status  | Pending                             |
| Delivery Status | Undelivered <a href="#">Process</a> |
| Payment Status  | Paid                                |
| Payment Date    | 07/29/10 14:35                      |

An Invoice changes to a status of Cancelled when one of the following events occurs:

- ◆ Another Invoice is created to supersede the original Invoice; or
- ◆ The Invoice was created for a specific Incident and that Incident was deleted/cancelled either manually or due to the Incident Cancel Time, set by the system Administrator, being exceeded. See Setup>Billing within the Administrator Guide.

## Editing an Invoice

To amend Invoice details or to include additional Line Items, edit or enter the information prior to selecting the Process hyperlink. This link is not available when the Invoice is in Edit mode, as all Invoice information must be locked down to ensure the application has control of the details of the Items and their delivery.

### 5.12.5 Invoice Payment & Delivery

Relative to the workings of your support organization, Item and/or Support Contract Invoices may or may not need to be paid before an Item can be delivered to your Customer or Support Contract used by your Customer.

To update the Shipping Date, open the Invoice in Edit mode when the Delivery Status is Undelivered and enter the relevant date within the Shipping Date field.

## Processing an Invoice when Payment is Required

For organizations where the option of Payment Required is enabled by the Administrator, a User with Finance access is the only User who can update the Payment Status of an Invoice. To update the Payment Status, the Finance User selects the Payment Received hyperlink of an Invoice to change the status to Paid. Once payment has been made, any other User, such as a Supervisor, can process the Invoice.

| Status          |   |
|-----------------|---|
| Invoice Status  | Pending   |
| Delivery Status | Undelivered <a href="#">Process</a>             |
| Payment Status  | Pending Unpaid <a href="#">Payment Received</a> |
| Payment Date    |   |

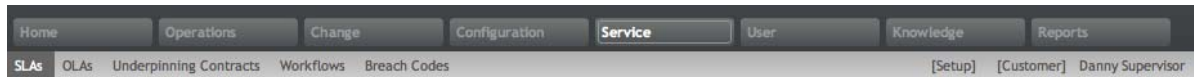
## Processing an Invoice when Payment is not Required

If the Payment Required option has not been enabled by the system Administrator, a Line Item can be activated in the support system by selecting the Delivery Status Process hyperlink. This means that Customer payment does not need to be received by the organization before the Customer Item is delivered or a support contract is activated in the system.

When the Process hyperlink is clicked, the Invoice Status is updated to Active, and the Delivery Status changes to Delivered. (If the invoice is related to a support contract, the request status is moved from Pending - No Contract to the Workflow default open State, such as Pending.)

| Status          |   |
|-----------------|---|
| Invoice Status  | Active  |
| Delivery Status | Delivered                                       |
| Payment Status  | Pending Unpaid <a href="#">Payment Received</a> |
| Payment Date    |   |
| Shipping Date   | 07/29/10 14:01                                  |

### 5.12.6 Service Level Agreements (SLAs)



Service Level Agreements (SLAs) are used by organizations to manage the levels of service expected of the IT and to ensure optimal maintenance of critical business systems and services. SLAs are documents that are negotiated between the Service Provider and Customer departments, to identify expectations and clarify responsibilities.

This tab is used to create and modify Service Level Agreements that provide request management capabilities.

SLAs include the following elements:

- ◆ Name
- ◆ Service Level Manager
- ◆ Priority Targets
- ◆ Automated Alert Notifications
- ◆ Pricing (if enabled in Admin>Setup>Billing)
- ◆ Blackout Periods
- ◆ Workflows.

#### Details

### Creating a Service Level Agreement

To create a new Service Level Agreement:

1. Select Service >SLAs
2. Click New

The screen defaults to the Details tab of the SLA Editor screen.



The screenshot shows the 'SLA Editor' window with four tabs: 'Details', 'Targets', 'Blackouts', and 'Workflows'. The 'Details' tab is active and contains the following sections:

- Details:** Name (text field), On Breach (checkbox for 'cc Team Leader'), Pause on Holiday (checkbox), Customer Timezone (checkbox), Timezone (dropdown menu showing '(GMT +10:00) Melbourne, Syd').
- Requirements:** Availability (text field '97.0' followed by '% Uptime'), Interval Measured in (text field) followed by 'Days'.
- SLM:** Name, Email.

On the right side of the 'Details' tab, there are two sections:

- Internal Costs:** Annual Cost (0.00), Request Cost (0.00), Hourly Cost (0.00).
- Customer Prices:** Annual Price (0.00), Request Price (0.00), Hourly Price (0.00).

At the bottom right, there is a 'Find Service Level Manager' dialog box with fields for First Name, Last Name, Email, and Phone, and 'Cancel' and 'Next' buttons.

3. Complete the fields, including any custom fields, as required:
- 4.

---

#### SLA Editor

---

##### Details

|                  |  |
|------------------|--|
| Name*            | The name to identify the SLA.  |
| Review Date      | Details are completed based on the Admin default settings but can be edited by the User. An Alert is sent based on the default days set in the Review SLA Alert field in Admin>Setup>Privileges>Requests.  |
| On Breach        | Notification can be set to Carbon Copy (CC) an email to the Team Leader when the Warning or Escalation alert is sent to the Technician assigned to the request. It should be noted that the Service Level Manager is also notified when an SLA is breached.  |
| Pause on Holiday | <p>**This option is only displayed if the Observe Public Holidays option has been enabled within the Administrator&gt;Setup&gt;Privileges&gt;User tab.</p> <p>Enable this option, if the SLA is to be adjusted on designated Public Holidays. The Public Holidays are defined within the Administrator&gt;Setup&gt;Public Holidays screen and associated with requests via the assigned Technician and their associated Country.</p> |

---

---

**SLA Editor**

---

|                             |  |
|-----------------------------|--|
| Customer Timezone           | When enabled, SLA times displayed within the Technician request view uses the Customer timezone.   |
| Timezone                    | This is visible when Customer Timezone is not set and all SLA dates are calculated based on the Timezone set within this field. This is especially applicable for User Work Hours, Blackouts, which also impacts the SLA Reports.  |
| Requirements                |  |
| Availability*               | Used to state the time an Item under the SLA is required to be online. The default value is set to 97%.  |
| Interval Measured in        | Defines the number of days over which the Availability requirement is calculated.  |
| Priority                    |  |
| Process Name                | <p>The field is displayed when Workflows have been assigned to the SLA.</p> <p>If multiple Workflows have been assigned for each Process, this field allows the User to assign a default Workflow for the SLA. When a request is created using the SLA, the default Workflow is assigned to the request.</p>   |
| SLM (Service Level Manager) |  |
| Name                        | Use the Find Service Level Manager search option, to enter the contact details of the Manager who will monitor the performance of the SLA.   |
| Email                       | <p>This is also the User who is assigned responsibility for managing the performance of external support providers when a request moves into a Workflow State that is supported by an Underpinning Contract</p> <p>.</p>   |
| Internal Cost ^             |  |
| Annual Cost ^               | <p>The SLA cost is calculated on the basis of what is costs the service organization to provide the service agreement, as applied on a yearly basis per User. The figure is associated with Items and used to calculate the cost of supplying a Service. This figure can be used as the basis for setting the Annual Price.</p> <p>The figure entered should be on a Annual Cost per User basis.</p> |
| Request Cost ^              | Indicates the cost applied on a Per Request basis. This figure can be used as a reference for setting the Incident Price.  |

---

---

**SLA Editor**

---

|                    |  |
|--------------------|--|
| Hourly Cost ^      | Indicates the cost applied on an Hourly basis. This figure can be used as a reference for setting the Hourly Price.  |
| Customer Pricing ^ |  |
| Annual Price ^     | This is the charge applied to the SLA on a yearly basis and paid by the customer consuming the Service associated with the SLA. (It should be greater than the SLA Cost, as it would include the cost of servicing the SLA plus a profit margin, if relevant.) The figure is associated with Items and used to calculate the price paid by the customer for consuming a Service.<br><br>The figure entered should be on a Annual Price per User basis. |
| Request Price ^    | Indicates the price paid by the customer when the SLA is applied on a Per Request basis.   |
| Hourly Price ^     | Indicates the price paid by the customer when the SLA is applied on an Hourly basis.   |

---

\* Denotes a mandatory field

^ Only applicable when SLA Prices are enabled in Setup>Billing

## Targets

The Targets tab is used to configure the SLA's priority Response, Restoration and Resolution Times.

To modify a Priority:

1. Select Service > SLAs
2. Select an SLA
3. Select the Targets tab to display the following fields:
- 4.

---

**SLA Editor**

---

|              |  |
|--------------|--|
| Targets      |  |
| Targets      | <i>Common:</i> Select Common if the SLA is to apply across Incidents, Requests, Problems and Change Management.<br><br><i>Per Process:</i> If the SLA is specific to a Process, select Per Process and choose a Process displayed in the drop-down list. |
| Interval     | Define if the time is to be calculated in Hours or Minutes.  |
| Service Time |  |
| Priority     | Urgent, High, Medium and Low.  |
| Milestones   |  |

---

---

**SLA Editor**

---

|                   |   |
|-------------------|---|
| Initial Response  | The maximum time the Customer would wait from the point of request creation before receiving a Note update for a Technician. The Response trigger is stopped when a Note has been added to the request by the assigned Technician and an email is sent to the Customer. If the Response Time is reached, without a Note being added, the request will be escalated. |
| Restoration Time  | The maximum time the Customer would wait from the time the request was created until a workaround or temporary fix has been implemented. The Restoration trigger stops by assigning the request a Workflow State that has to the SLA Restoration option set to Yes. By default, this Workflow State is Open - Restored.   |
| Resolution Time   | The taken time from the point of request creation until it the request is moved to a Workflow State with the SLA Resolution option set to Yes. Any of the default Workflow Exit States stop the Resolution Timer.   |
| Notify Override   | If the system is to override the default notification method set for a request when the Priority being edited is assigned to a request, check this option.  |
| Notification Type | Set Email or SMS as the type of notification when the override action is applied to a Priority.   |
| Alerts            |   |
| Reminder          | Sends a reminder email to the Technician when the defined percentage of time elapses for a Response, Restoration or Resolution target that has not been met on a request. Can be set up to 200% of the SLA. Note, Alert intervals are not cumulative.   |
| Warning           | Sends a warning email to the Technician when the defined percentage of time elapses for a Response, Restoration or Resolution target that has not been met on a request. Can be set up to 200% of the SLA.  |
| Escalation        | Escalates the request to a higher escalation layer when the defined percentage of time elapses for a Response, Restoration or Resolution target that has not been met on a request. Can be set up to 200% of the SLA. It should be noted that the Service Level Manager is also notified when an SLA is breached.   |
| Support           |   |
| 24 x 7            | Do not amend if the SLA is to apply 24 hours a day, 7 days a week.  |

---

## SLA Editor

Normal Support

Select if service hours are to be defined for the SLA. When checked, define the service hours by either selecting a template (Templates are configured by the Administrator in the Setup>Localization>Hours tab) or manually define the days and time by making selections within the drop-down lists.

5. Click Edit, if not already in Edit mode

| Priority | Response Time | Restoration Time | Resolution Time | 24 x 7 support | Alert  |
|----------|---------------|------------------|-----------------|----------------|--------|
| Urgent   | 6 Hours       | 12 Hours         | 24 Hours        | No             | Action |
| High     | 12 Hours      | 24 Hours         | 48 Hours        | No             | Action |
| Medium   | 18 Hours      | 36 Hours         | 72 Hours        | No             | Action |
| Low      | 24 Hours      | 48 Hours         | 96 Hours        | No             | Action |

6. Define if the SLA applies across all Processes or to a specific Process
7. Define if the SLA is to be calculated in minutes or hours
8. Select the Priority link to customize Milestones, Alerts and Support hours

Initial Response: 12 Hours  
Restoration Time: 24 Hours  
Resolution Time: 48 Hours

Notify Override:   
Notification Type: None

Alerts: **Reminder** @  %  
Warning  
Escalation

9. Modify the Milestone intervals for the Response Time, Restoration Time and Resolution Time, as required

---

**NOTE:** The time will be set in minutes or hours, as defined for the SLA.

Milestone intervals are not cumulative

For example, for the default Warranty SLA, the Priority of Urgent has the default Milestone times of 6, 12 and 24 hours. This means a User has 6 hours to send a response to a Customer before the Response time is breached, 12 hours from the point of request creation to meet the Restoration time, and 24 hours from the point of request creation to meet the Resolution time. It should be noted that requests may be moved to non-SLA timed States during these Milestone periods, so the 12 or 24 hours may not be consecutive hours.

---

10. Check the Notify Override option, if relevant

Set the type of notification, email or SMS, that is to be used to contact the User assigned to the request with this Priority.

11. Create one or multiple Reminder, Warning or Escalation Alerts, if relevant
- 

**NOTE:** Enter the percentage of time to elapse for an Alert to be triggered for a Milestone. Selecting Warning as the Alert will cause a warning e-mail to be sent to the request's Technician when the specified percentage of a milestone has been reached.

Selecting Escalation will trigger a request escalation to the next support layer of the Team. The escalation system will also fire if the SLA threshold is breached.

It is recommended that reminders be sent at 50% of elapsed time and escalations at 75-80%

These figures are advisory only. The internal processes of your organization will dictate the appropriate values. The Reminder percentage must be less than the Warning or Escalation percentages.

Alerts can be set to 200% of the SLA time, which ensures notifications can be still be received against breached requests

If Alerts are not customized, the application will automatically escalate the request when the Priority milestone is breached

---

12. Click Save

13. Modify other Priorities as necessary.

## Configuring Support Hours

After the Priority times and Alerts of an SLA have been configured, Support Hours can be defined. These can be set to 24 hours by 7 days a week (24 X 7), or manually adjusted to reflect the support operation open hours.

Under 24 X 7 mode, if the SLA's urgent Initial Response field is set to six hours, and an urgent request that uses the SLA is created at midnight in the assigned Technician's time zone, those six hours will expire by 6:00 AM. This is the option to use if a support operation is staffed 24 hours a day.

If a support operation is not open 24 hours a day, the request timers are not required to run when Technicians are not available. For instance, if the support hours are 9:00 AM to 5:00 PM and the SLA hours reflect this, the SLA timers of the urgent request created at midnight would not start ticking until 9:00 AM the following business day and would expire at 3:00 PM.

To define the SLA support hours:

1. Select Service > SLAs
2. Select an SLA
3. Click the Priority link

This will display the Details tab with Support Hours options of 24x7 and Normal

4. The default setting is 24 X 7, to amend the support hours select the Normal Support option

**SLA Editor**

Details | **Targets** | Blackouts | Workflows

**Criticality**  
Priority High

**Milestones**  
Initial Response 12 Hours  
Restoration Time 24 Hours  
Resolution Time 48 Hours

Notify Override   
Notification Type None

**Alerts** +  
- Reminder @ 50 %  
- Warning @ 75 %  
- Escalation @ 90 %

**Support**  24 x 7  Normal Support

Hours

Apply Template ✓  
Weekdays 8 to 5  
Weekdays 9 to 5

Sunday <closed> to <closed>  
Monday 08:00 to 17:00  
Tuesday 08:00 to 17:00  
Wednesday 08:00 to 17:00  
Thursday 08:00 to 17:00  
Friday 08:00 to 17:00  
Saturday <closed> to <closed>

Cancel Save

5. Select a template from the Apply Template drop-down options or customize Weekdays manually.

Note that the SLA timers become inactive when the support desk is closed.

6. Click Save.

## Blackouts

Blackouts are used as part of Change and Configuration Management to advise Users about the appropriate periods of time that an Item associated with an SLA should be scheduled to be taken off-line if an Outage is needed. Within the system, when an Outage is being scheduled (Item>Details>Outages) the Blackout period is displayed, informing the User of the best time to schedule a Planned Outage.

A Blackout Period is based on an agreement between the Customer and the Service Desk regarding set times that the Customer has no service expectations. This can also be the preferred time for Item upgrades and maintenance as they will not affect service availability.

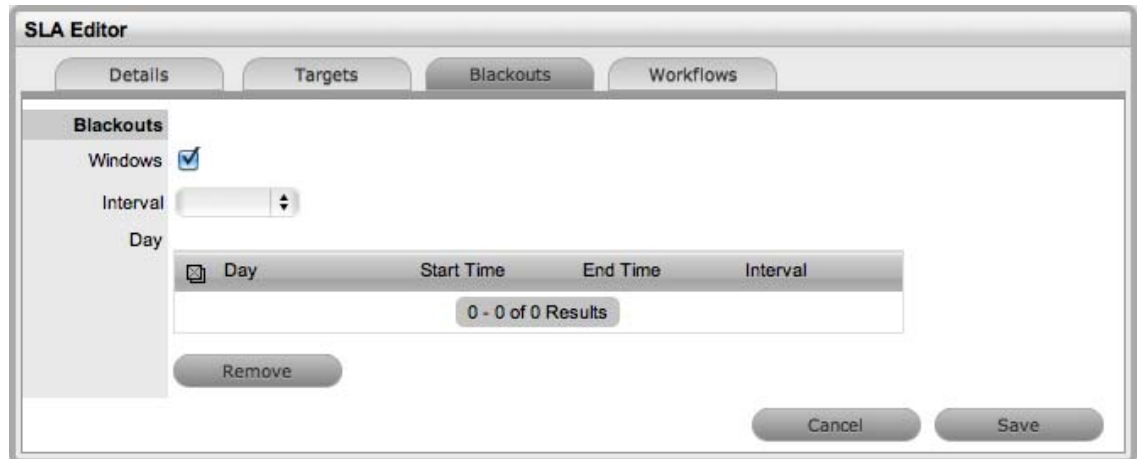
A Blackout Period is specified within an SLA. During this time the SLA is viewed as inactive and its measuring time is stopped. OLAs that underpin a Workflow State that apply an SLA with a Blackout Period, also adopt the Blackout Period.

## Specifying an SLA Blackout

To specify an SLA Blackout:

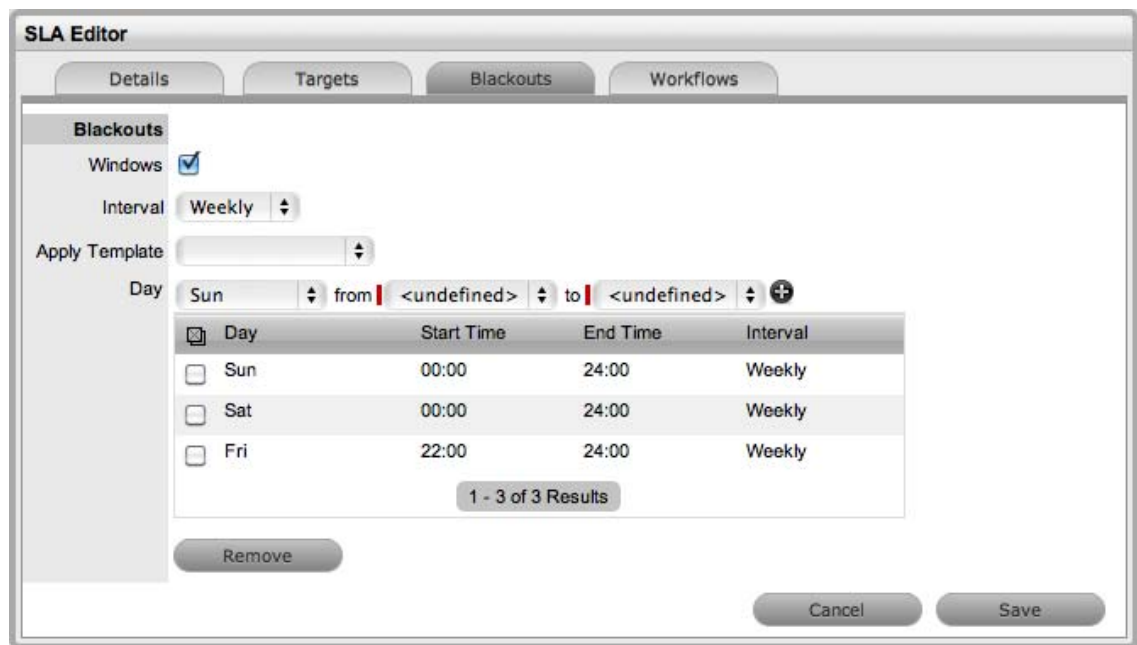
1. Select Service >SLAs
2. Click an SLA hyperlink
3. Click Edit
4. Move to the Blackouts tab

5. Tick the Windows option



6. Set the Interval of weekly or monthly
7. Apply a Template or define the day and time period for the approved Blackout manually, then click **+**
8. Define the preferred Timezone

This is required information to save the Blackout information.



9. Click Save.

See: [Item Planned Outages using Blackout Periods](#)

To remove time-frames from the Blackout Period:

1. Select Service >SLAs
2. Click an SLA hyperlink
3. Click Edit



4. Move to the Blackouts tab
5. Check the box next to the Day to be deleted from the Blackout

| <input type="checkbox"/> Day            | Start Time | End Time | Interval |
|---|------------|----------|----------|
| <input type="checkbox"/> Sun            | 00:00      | 24:00    | Weekly   |
| <input type="checkbox"/> Sat            | 00:00      | 24:00    | Weekly   |
| <input checked="" type="checkbox"/> Mon | 00:00      | 05:30    | Weekly   |
| <input checked="" type="checkbox"/> Fri | 22:00      | 24:00    | Weekly   |

1 - 4 of 4 Results

[Remove](#)

6. Click Remove.

## Workflows

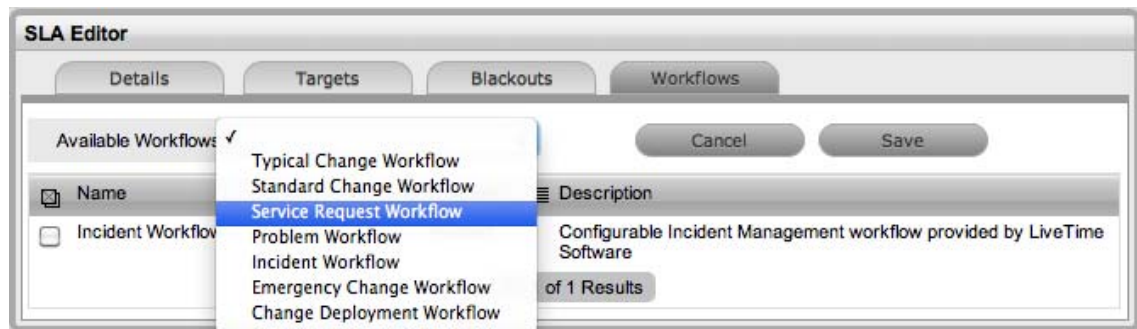
Workflows are associated with an SLA through the Workflows tab of the SLA Editor screen or within the Workflow itself. All SLAs assigned to the SLA are listed within this tab and Workflows can be added or removed within this tab, as required.

### Assigning a Workflow

To assign a Workflow:

1. Select Service>SLAs
2. Click the relevant SLA link
3. Move to the Workflows tab
4. Click Edit
5. Select Add

The Available Workflow drop-down list will be displayed.



6. Select a Workflow
7. Click Save.

To remove a Workflow assignment, use the checkbox next to the relevant Workflow and click the Remove button.

## Default Warranty SLA

The system includes a default SLA that does not include costs, called Warranty. The Warranty SLA can be used or edited as required.

## Integration with Request Creation and the Billing System

The prices specified in the SLA provide the basis for fees charged for support on both a Per Request basis and on a subscription basis. The hourly rate is included for reporting purposes. Rather than an Item using an SLA, Items can be covered by maintenance contracts. A contract can cover a particular request, or exist as a subscription.

Maintenance Contracts form part of the request creation process. Requests can be entered into the system without a valid contract, but are flagged as unpaid, and are unable to be worked on until the invoice is processed. There is also a control (configured in the Billing Preferences) for the length of time an unpaid request can exist in the system.

See: [Assigning an SLA to a Customer](#)

See: [Assigning an SLA to an Organizational Unit when Contracts are Disabled](#)

## Assigning a Default Workflow to an SLA

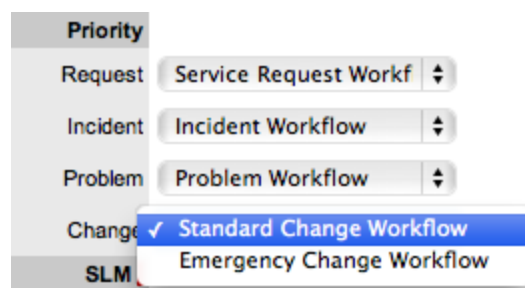
If more than one process Workflow is assigned to an SLA, it is required to select a default Workflow. This default Workflow will be the Workflow assigned to a request when the SLA assigned supports more than one Workflow.

To assign a Default Workflow:

1. Select an SLA from the Service > SLA tab
2. Click Edit

Note that the system automatically assigns a default Workflow to an SLA, as Workflows are being assigned.

3. Within the Priority Field, use the drop-down lists to update the relevant Incident, Problem, Change and Service Request default Workflows



The screenshot shows a configuration interface for the 'Priority' field. It consists of a table with five rows, each representing a different request type. Each row has a label on the left and a dropdown menu on the right. The 'Change' dropdown menu is currently open, showing two options: 'Standard Change Workflow' (which is selected with a checkmark) and 'Emergency Change Workflow'. The 'SLM' row is partially visible at the bottom.

| Priority |   |
|----------|---|
| Request  | Service Request Workf                                 |
| Incident | Incident Workflow                                     |
| Problem  | Problem Workflow                                      |
| Change   | Standard Change Workflow<br>Emergency Change Workflow |
| SLM      |   |

4. Click Save to apply the change.

### 5.12.7 Outages

An Outage is when an Item Status is unavailable due to expected or unexpected events. For example, the Item may be out for repair or faulty. To move an Item into an unavailable State, and therefore list it as inactive, the Item Status selected for the Active State option within the [Item Category Lifecycle](#) must be set to No, and the Offline State option set to Yes.

## Planned Outages

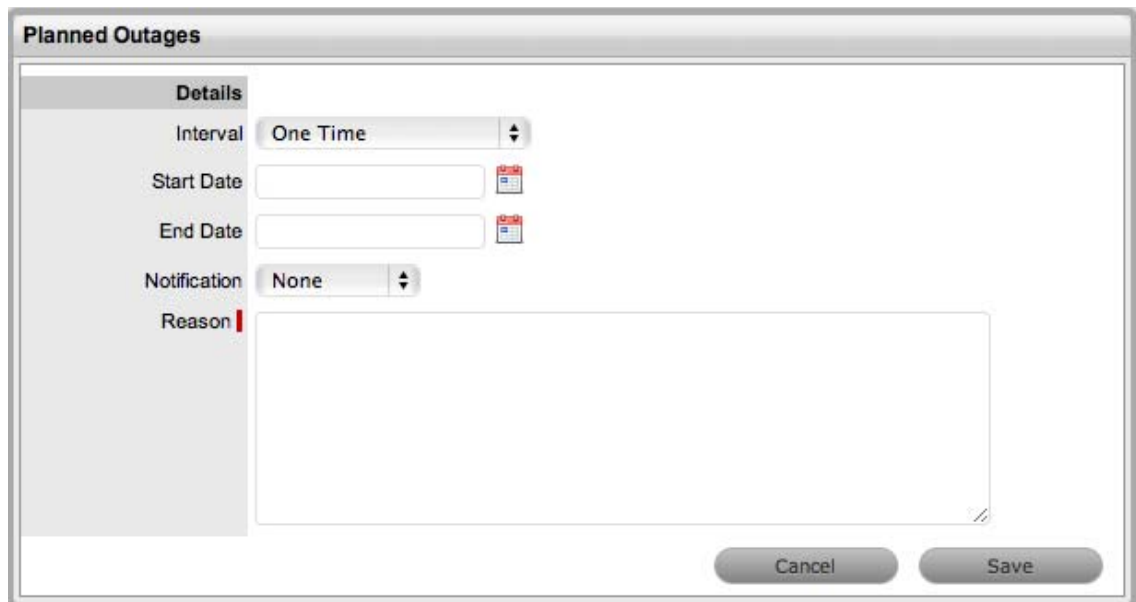
Planned Outages are used to manage Items' proposed unavailability. This is useful for informing Customers and Users about planned changes to infrastructure that may cause an Item to be taken offline or out of service.

If an Item has an SLA with a specified Blackout Period, ideally Outages should be planned to fall within this time. The Blackout Period is an agreement between the Customer and the service provider regarding a period of time when the Customer has no service expectations. This can also be the preferred time for Item upgrades and maintenance without affecting service availability. To access the Blackout Period details for an SLA associated with an Item, create the Planned Outage within the [Outages tab](#) of the Item Information screen.

## Creating a Planned Outage

To create an Outage:

1. Select Configuration > Outages
2. Click New



**Planned Outages**

**Details**

Interval: One Time

Start Date: [Calendar Icon]

End Date: [Calendar Icon]

Notification: None

Reason: [Text Area]

Cancel Save

3.

---

### Planned Outages

---

| Details    | Description  |
|------------|--|
| Interval   | Select One Time if the Outage is a one off, or set regular outages based on a weekly or monthly basis. |
| Start Date | Select the Start Date within the calendar, and modify the Time accordingly inside the calendar pop-up. |
| End Date   | Select the End Date within the calendar, and modify the Time accordingly inside the calendar pop-up.   |

---

---

## Planned Outages

---

|              |   |
|--------------|---|
| Notification | Select Email or SMS Notification about the Outage is to be sent to the Primary Contact of the Org. Unit, or All Customers/Owners associated with the Item.  |
| Reminder     | This option is displayed when a Notification is set for the Outage.<br><br>If a Reminder notification is to be applied to the Outage, check the box and define the period of time prior to the Planned Outage period that the reminder is to be issued. |
| Reason       | Enter a description that details why a Planned Outage is being scheduled.   |

---

### 4. Define the Interval for the Outage

The options of One Time, Weekly and Monthly are available.

### 5. Set the Outage Start and End dates

### 6. Set the Notification method and recipients

These are applied when the Outage is saved.

### 7. Tick the Reminder Email field

If a reminder is to be emailed to defined recipients prior to the Outage time. Define the length of time before the Outage occurs that the reminder is to be sent.

Notification: Email | Primary Contacts

Reminder Email:  24 hours before outage.

### 8. Enter the Reason for the Outage

### 9. Click Save

The add Items option is displayed.

Items + -

| Item Number | Type | Identifier | Status |
|-------------|------|------------|--------|
|-------------|------|------------|--------|

0 - 0 of 0 Results

### 10. Click +

The Find Item/Item Type field is displayed.

### 11. Enter the known Item Number or Type and click 🔍

### 12. Click the Item Number hyperlink to add the Item to the Outage

**Planned Outages**

| Item           |              |
|----------------|--------------|
| Item Number    | 100002       |
| Item Type      | Service Desk |
| Offline Status | Offline      |
| Online Status  | Available    |

Cancel Save

- Define the Offline Status and Online Status for the Item

These are the States the Item will be automatically assigned in the CMDB when the Planned Outage commences and ends.

- Click Save

Repeat Steps 9 to 12 to add more than one Item to the Outage. Click to remove Item details from the Outage.

- Click Save and Done.

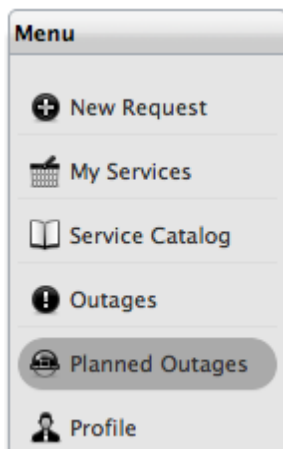
The Outage details are visible in the Planned Outage page, if the Criticality of the Item is equal to or greater than the Minimum Criticality set by the Administrator within the Setup>Privileges>System tab.

## Viewing Outages

Planned Outages can be viewed from the Login Page and the Customer Portal, if the Administrator has toggled the Setup>Privileges>System Outages Page option to Yes. This enables the Planned and Unplanned Outage links in the Customer Portal and Login Page.

## Customer Portal View

In the Customer Portal the Planned Outages information is accessible in the side bar menu of the Items and Services tab.



| Planned Outages |                |                |                       |                 |
|-----------------|----------------|----------------|-----------------------|-----------------|
| No.             | Start Date     | End Date       | Items                 | Reason          |
| 10              | 02/27/12 00:00 | 02/28/12 00:00 | 100002 (Service Desk) | Upgrade Service |

Click to view details

1 - 1 of 1 Results

To view the Outage details, click the Outage No. link. To close the window, click Done.

| Outage Details |                |        |                 |
|----------------|----------------|--------|-----------------|
| No.            | 10             | Reason | Upgrade Service |
| Start Date     | 02/27/12 00:00 |        |                 |
| End Date       | 02/28/12 00:00 |        |                 |

| Items       |              |          |
|-------------|--------------|----------|
| Item Number | Type         | Category |
| 100002      | Service Desk | Service  |

Done

## Login Page View

Planned Outage information can also be accessed from the Login page, Click the View Outages link to display a complete list of current outages. Select the View Planned Outages link to access planned downtime details.

|   |
|---|
| <a href="#">View Knowledge Base</a><br><a href="#">View Forums</a><br><a href="#">Surveys</a><br><a href="#">Alerts</a><br><a href="#">View Outages</a><br><a href="#">View Planned Outages</a> |
| <a href="#">Forgot Password</a><br><a href="#">New Account</a>  |

| Planned Outages |                |                |                       |                 |
|-----------------|----------------|----------------|-----------------------|-----------------|
| No.             | Start Date     | End Date       | Items                 | Reason          |
| 10              | 02/27/12 00:00 | 02/28/12 00:00 | 100002 (Service Desk) | Upgrade Service |

Click to view details

1 - 1 of 1 Results

## Planned Outage Page Options

- ◆ Search for Outages based on the Item Type

This functionality is enabled by the Administrator in Setup>Privileges>System Search Outages.

- Within the Outage Details window, click on the Item Number link to show the Item Relationship Map  
To enable this feature, the Show Affected Relationships option must be activated by the Administrator in Setup>Privileges>System Outages.
- To return to the Planned Outage list, click the Done.

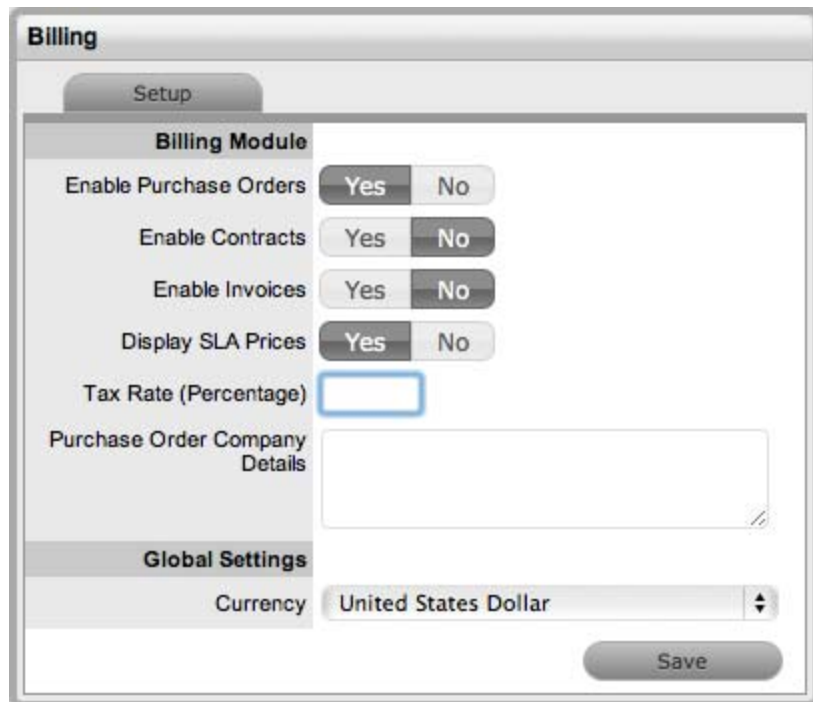
## 5.12.8 Purchase Orders

Purchase Orders can simplify the tracking of where and when new Items are purchased or leased. This feature is not meant to replace an organization's original PO system, it is designed to easily link a specific PO number (and its associated vendor and date information) with an Item.

### Enabling Purchase Orders

To enable Purchase Orders:

1. Select Setup>Billing
2. Set the option Enable Purchase Orders to Yes



The screenshot shows the 'Billing' window with a 'Setup' tab selected. Under the 'Billing Module' section, there are four toggle buttons: 'Enable Purchase Orders' (set to Yes), 'Enable Contracts' (set to No), 'Enable Invoices' (set to No), and 'Display SLA Prices' (set to No). Below these is a text input field for 'Tax Rate (Percentage)'. Under the 'Global Settings' section, there is a dropdown menu for 'Currency' currently set to 'United States Dollar'. A 'Save' button is located at the bottom right of the window.

3. Set the default tax rate  
The percentage amount entered here is applied by default to all POs.
4. Enter the Company Details to be used on the PO
5. In Global Settings, select the preferred currency
6. Click Save.

---

**NOTE:** A logo can be applied to system generated POs by adding the graphic within the [Setup>Customize](#) tab. (This option is only displayed when the Purchase Orders functionality is enabled within the Setup>Billing tab.)

---

The Purchase Order sub-menu option is made available within the Finance tab for Finance, Supervisor and Technician Users, when enabled.

## 5.12.9 Contracts

A Contract is made up of a Service Level Agreement (SLA) and a Service Delivery Period (start and end time). They can be used to manage an entitlement to service from a start date, through to an end date.

Contracts and Invoices are used together when the Service Desk needs to charge its Customers for any support provided. Billing within the system is on a per Contract basis, and is enabled automatically when Invoices are activated.

Contracts can be created for different elements to suit organizational needs. Contracts can cover the individual elements:

- ◆ Items
- ◆ Customers
- ◆ Organizational Units
- ◆ Requests.

Pending Contracts are contracts that have a start date set in the future. They automatically become active on the contract start date or can be enabled manually.

### Enabling Contracts

To enable a Contract:

1. Select Setup>Billing
  2. Click Yes to enable Contracts
- A Contracts tab will be visible.



**Billing**

Setup Contracts

**Billing Module**

Enable Purchase Orders  Yes  No

Enable Contracts  Yes  No

Enable Invoices  Yes  No

Display SLA Prices  Yes  No

Email Notifications  Enabled  Disabled

**Global Settings**

Currency

Save

3. Define the Email Notifications option for Finance Users  
When enabled, automated emails are sent to Finance Users regarding matters relating to POs, Invoices and/or Contracts.
4. Set the Currency for all financial transactions managed by the system
5. Move to the Contracts tab to define parameters for

**Billing**

Setup Contracts

**Subscription**

Contract Renewal Time  days

Default Contract Duration  months

**Time**

Low Time Alert  Yes  No

Threshold  % Elapsed

Low Time Email  Yes  No

Threshold  % Elapsed

**Expiration**

Time Expired  Complete Request  Purchase Time

Overtime  Rollover  Ignore

Save

6. Contracts

| Options      | Description |
|--------------|-------------|
| Subscription |             |

| Options                           | Description  |
|-----------------------------------|--|
| Contract Renewal Time             | <p>The system can automatically send a Contract Renewal Invoice before a contract expires. Enter the number of days prior to the contract expiration date for the system to send the renewal invoice.</p> <p>For Contracts not to be automatically created, leave this field blank.</p> <p>(The information for the invoice can be configured in the InvoiceSummary link within the Setup&gt;Email&gt;Templates&gt;Email Summary Templates filter screen. This template is sent with the InvoicePrefix email that can be edited in Setup&gt;Email&gt;Templates&gt;Full Email Templates list.)</p>  |
| Default Contract Duration<br>Time | <p>The system sets the default contract renewal period to 12 months, adjust or delete the entry as required.</p>   |
| Low Time Alert                    | <p>The system can automatically create an alert within the Customer Portal for customers that have Time-based contracts (i.e., purchased a quantity of support hours.) The Alert can be sent based on the percentage of hours that have been used.</p>   |
| Low Time Email                    | <p>The system can automatically send an email to a Customer that is getting close to using all their support hours in their Time-based contracts. The Email can be sent based on the percentage of hours that have been used.</p> <p>The Email content is set in the ContractTimeLow option of Setup&gt;Email&gt;Templates.</p>  |
| Expiration<br>Time Expired        | <p>When a Customer's contract is expired when a User is working on a request, this option specifies if the User can Complete the request although the Contract has expired and if the system will lock out the User until the Customer has purchased additional time.</p> <p>When Complete Request is selected, the following options are displayed:</p> <ul style="list-style-type: none"> <li>◆ Rollover - means the time used to resolve the issue will be subtracted from the Customer's renewed contract.</li> <li>◆ Ignore - means the time used to resolve the issue, although the Customer contract has expired, is not allocated to a future contract.</li> </ul> <p>(The subject line and content for the automated emails sent on contract expiration is configured in the ContractTimeElapsed and ContractTimeElapsed of Setup&gt;Email&gt;Templates.)</p> |

7. Enter the Contract Renewal Time, if required  
For contracts not to be automatically created, leave this field blank.
8. Set Notifications and Thresholds
9. Set Time Expired option

|                   |                          |               |
|-------------------|--------------------------|---------------|
| <b>Expiration</b> |                          |               |
| Time Expired      | <b>Complete Incident</b> | Purchase Time |
| Overtime          | Rollover                 | <b>Ignore</b> |

10. Click Save.

## 5.12.10 Invoices

Invoices are used for the billing of Contracts and can also be used for Purchase Orders. When Invoices are enabled, Contracts are enabled automatically. Invoices can be used to maintain the purchasing of Items as well as Contracts for these and existing Items.

### Enabling Contracts and Invoices

When an Invoice is created, a Contract is automatically generated.

To enable Invoices:

1. Select Setup>Billing
2. Click Yes to enable Invoices

When an Invoice is enabled, the following options become

The screenshot shows a 'Billing' window with two tabs: 'Setup' and 'Contracts'. The 'Setup' tab is active. Under the 'Billing Module' section, there are several options with radio buttons: 'Enable Purchase Orders' (Yes/No), 'Enable Contracts' (Yes/No), 'Enable Invoices' (Yes/No), 'Payment Required' (Yes/No), and 'Display SLA Prices' (Yes/No). Below these are input fields for 'Tax Rate (Percentage)', 'Request Warning Time' (hours), 'Request Cancel Time' (hours), 'Invoice Warning Time' (days), and 'Default Invoice Due' (days). There are also radio buttons for 'Email Notifications' (Enabled/Disabled) and a text area for 'Terms and Conditions'. The 'Global Settings' section includes a 'Currency' dropdown menu set to 'United States Dollar'. A 'Save' button is located at the bottom right.

available.

3.

| Options               | Description  |
|-----------------------|--|
| Contracts             | Contracts are enabled automatically when Invoices are activated.   |
| Payment Required      | Setting Payment Required to Yes will require line items on invoices to be paid before they become active in the system. Any incidents logged against an unpaid Contract or Item cannot be worked on until payment is received.<br><br><b>NOTE:</b> Note: Invoice payments can only be processed by a Finance User. |
| Tax Rate (Percentage) | The rate used to calculate tax on an invoice subtotal.   |
| Request Warning Time  | Where a Contract has not been paid and requests have been raised, a reminder email can be sent stating that payment is due. Use this field to specify the length of time in hours from the opening of the incident before sending a reminder email.  |

| <b>Options</b>                 | <b>Description</b>  |
|--------------------------------|---|
| Request Cancel Time            | Specifies a waiting time for requests with a Status of Pending-Unpaid before they are cancelled.  |
| Invoice Warning Time           | Enter the number of days prior to the due date to send the Customer a reminder email regarding non-payment of an invoice.   |
| Contract Renewal Time          | The system can automatically send a Contract Renewal Invoice before the end of a contract. Enter the number of days prior to the contract expiry to send the renewal invoice. |
| Default Invoice Due*           | Enter the number of days to calculate an invoice due date.  |
| Email Notifications            | Enables the system to update Finance Users, via automated emails, regarding matters relating to POs, Invoices and/or Contracts.   |
| Terms and Conditions           | Free text entered in this field is included in the invoice emailed to the Customer.   |
| Purchase Order Company Details | This option is displayed if the Purchase Orders option is also enabled.<br><br>Enter the Company details to be displayed on Purchase Orders.                                  |
| Currency                       | Select the currency for all financial transactions within the system.   |

\*Denotes mandatory field.

1. Enable the Payment Required and Email Notification options, if necessary
2. Complete all the necessary fields
3. Select preferred currency
4. Click Save.

## 5.13 AMIE

### 5.13.1 AMIE Mappings for Servers

The Asset Management Import Engine (AMIE) integrates with the following Inventory Management Products:

- ◆ Absolute Manage 6.0
- ◆ Centennial Discovery 2005, 9
- ◆ Express Software Manager 9.0, 9.5
- ◆ HP Universal CMDB 8.0
- ◆ LANDesk 8.5, 9.0, 9.0 (Hardware)
- ◆ LANrev 5.1
- ◆ LiveTime Discovery 2005, 2007

- ♦ LOGINventory 4.3
- ♦ Manage Engine Desktop Central 7.0
- ♦ Microsoft SMS Version 2003 SP1
- ♦ Microsoft SCCM 2007
- ♦ Spiceworks 4.0, 5.0
- ♦ ZENworks Asset Management 6.5+
- ♦ ZENworks Configuration Management 11.1, 11.1 (Hardware).

The default AMIE mappings for each server type are as follows:

## Absolute Manage 6.0

| ITEM CATEGORY              | Hardware                          |
|----------------------------|-----------------------------------|
| FIELD1 = "CPU"             |                                   |
| FIELD                      | "field1"                          |
| VALUE                      | "computer.PROPCPUSPEED"           |
| VALUE_PREFIX               | ""                                |
| VALUE_SUFFIX               | "Mhz"                             |
| FIELD2 = "RAM" --          |                                   |
| FIELD                      | "field2"                          |
| VALUE                      | "computer.PROPPHYSICALMEMORYSIZE" |
| VALUE_PREFIX               | ""                                |
| VALUE_SUFFIX               | "B"                               |
| FIELD3 = "MAC Address"     |                                   |
| FIELD                      | "field3"                          |
| VALUE                      | "computer.PROPPRIMARYMACADDRESS"  |
| VALUE_PREFIX               | ""                                |
| VALUE_SUFFIX               | ""                                |
| FIELD4 = "Network Address" |                                   |
| FIELD                      | "field4"                          |
| VALUE                      | "network.PROPIPADDRESS"           |
| VALUE_PREFIX               | ""                                |
| VALUE_SUFFIX               | ""                                |
| FIELD5 = "Network Name"    |                                   |
| FIELD                      | "field5"                          |
| VALUE                      | "network.PROPWINDHOST"            |
| VALUE_PREFIX               | ""                                |

| ITEM CATEGORY             | Hardware                       |
|---------------------------|--------------------------------|
| VALUE_SUFFIX              | ""                             |
| FIELD10 = "Serial Number" |                                |
| FIELD                     | "field10"                      |
| VALUE                     | "computer.PROPMACHINESERIALNO" |
| VALUE_PREFIX              | ""                             |
| VALUE_SUFFIX              | ""                             |

## Centennial Version 2005 & 9

| Item Category              | Hardware            |
|----------------------------|---------------------|
| <i>FIELD1 = "CPU"</i>      |                     |
| FIELD                      | "field1"            |
| VALUE                      | "Hardware.size"     |
| VALUE_PREFIX               | ""                  |
| VALUE_SUFFIX               | "MHz"               |
| FIELD2 = "RAM"             |                     |
| FIELD                      | "field2"            |
| VALUE                      | "Hardware.size"     |
| VALUE_PREFIX               | ""                  |
| VALUE_SUFFIX               | "KB"                |
| FIELD3 = "MAC Address"     |                     |
| FIELD                      | "field3"            |
| VALUE                      | "Client.macAddr1"   |
| VALUE_PREFIX               | ""                  |
| VALUE_SUFFIX               | ""                  |
| FIELD4 = "Network Address" |                     |
| FIELD                      | "field4"            |
| VALUE                      | "Client.ipaddr1"    |
| VALUE_PREFIX               | ""                  |
| VALUE_SUFFIX               | ""                  |
| FIELD5 = "Network Name"    |                     |
| FIELD                      | "field5"            |
| VALUE                      | "Client.sysMachine" |
| VALUE_PREFIX               | ""                  |

| Item Category             | Hardware               |
|---------------------------|------------------------|
| VALUE_SUFFIX              | ""                     |
| FIELD6 = "Platform"       |                        |
| FIELD                     | "field6"               |
| VALUE                     | "Windows"              |
| VALUE_PREFIX              | ""                     |
| VALUE_SUFFIX              | ""                     |
| FIELD10 = "Serial Number" |                        |
| FIELD                     | "field10"              |
| VALUE                     | "Hardware.driver"      |
| VALUE_PREFIX              | ""                     |
| VALUE_SUFFIX              | ""                     |
| Item Category             | Software               |
| FIELD3 = "Version"        |                        |
| FIELD                     | "field3"               |
| VALUE                     | "Products.versionName" |
| VALUE_PREFIX              | ""                     |
| VALUE_SUFFIX              | ""                     |

## Express Software Manager 9.0 & 9.5

| Item Category          | Hardware                      |
|------------------------|-------------------------------|
| FIELD1 = "CPU"         |                               |
| FIELD                  | "field1"                      |
| VALUE                  | "machinehardware.c_processor" |
| VALUE_PREFIX           | ""                            |
| VALUE_SUFFIX           | "Mhz"                         |
| FIELD2 = "RAM"         |                               |
| FIELD                  | "field2"                      |
| VALUE                  | "machinehardware.c_ram"       |
| VALUE_PREFIX           | ""                            |
| VALUE_SUFFIX           | "B"                           |
| FIELD3 = "MAC Address" |                               |
| FIELD                  | "field3"                      |
| VALUE                  | "machine.nicaddress"          |



| Item Category              | Hardware                              |
|----------------------------|---------------------------------------|
| VALUE_PREFIX               | ""                                    |
| VALUE_SUFFIX               | ""                                    |
| FIELD4 = "Network Address" |                                       |
| FIELD                      | "field4"                              |
| VALUE                      | "machine.ipaddress"                   |
| VALUE_PREFIX               | ""                                    |
| VALUE_SUFFIX               | ""                                    |
| FIELD5 = "Network Name"    |                                       |
| FIELD                      | "field5"                              |
| VALUE                      | "machine.name"                        |
| VALUE_PREFIX               | ""                                    |
| VALUE_SUFFIX               | ""                                    |
| FIELD10 = "Serial Number"  |                                       |
| FIELD                      | "field10"                             |
| VALUE                      | "machinehardware.machineserialnumber" |
| VALUE_PREFIX               | ""                                    |
| VALUE_SUFFIX               | ""                                    |

## HP Universal CMDB 8.0

| Item Category           | Hardware                        |
|-------------------------|---------------------------------|
| FIELD2 = "RAM"          |                                 |
| FIELD                   | "field2"                        |
| VALUE                   | "CDM_NT_1.A_NT_PHYSICAL_MEMORY" |
| VALUE_PREFIX            | "B"                             |
| VALUE_SUFFIX            | ""                              |
| FIELD5 = "Network Name" |                                 |
| FIELD                   | "field5"                        |
| VALUE                   | "CDM_HOST_1.A_HOST_HOSTNAME"    |
| VALUE_PREFIX            | ""                              |
| VALUE_SUFFIX            | ""                              |
| Item Category           | Software                        |
| FIELD1 = "Path"         |                                 |
| FIELD                   | "field1"                        |

| Item Category      | Hardware   |
|--------------------|--|
| VALUE              | "CDM_APPLICATION_1.A_APPLICATION_PATH"           |
| VALUE_PREFIX       | ""   |
| VALUE_SUFFIX       | "MHz"  |
| FIELD3 = "Version" |  |
| FIELD              | "field3"   |
| VALUE              | "CDM_APPLICATION_1.A_APPLICATION_VERSION_NUMBER" |
| VALUE_PREFIX       | ""   |
| VALUE_SUFFIX       | ""   |

## LANDesk 8.5

| ITEM CATEGORY              | Hardware                     |
|----------------------------|------------------------------|
| FIELD1 = "CPU"             |                              |
| FIELD                      | "field1"                     |
| VALUE                      | "Processor.mhzSpeed"         |
| VALUE_PREFIX               | ""                           |
| VALUE_SUFFIX               | "MHz"                        |
| FIELD2 = "RAM" --          |                              |
| FIELD                      | "field2"                     |
| VALUE                      | "Memory.bytesTotal"          |
| VALUE_PREFIX               | ""                           |
| VALUE_SUFFIX               | "B"                          |
| FIELD3 = "MAC Address"     |                              |
| FIELD                      | "field3"                     |
| VALUE                      | "NetworkSoftware.nicAddress" |
| VALUE_PREFIX               | ""                           |
| VALUE_SUFFIX               | ""                           |
| FIELD4 = "Network Address" |                              |
| FIELD                      | "field4"                     |
| VALUE                      | "TCP.address"                |
| VALUE_PREFIX               | ""                           |
| VALUE_SUFFIX               | ""                           |
| FIELD5 = "Network Name"    |                              |

| ITEM CATEGORY             | Hardware                        |
|---------------------------|---------------------------------|
| FIELD                     | "field5"                        |
| VALUE                     | "Computer.deviceName"           |
| VALUE_PREFIX              | ""                              |
| VALUE_SUFFIX              | ""                              |
| FIELD6 = "Platform"       |                                 |
| FIELD                     | "field6"                        |
| VALUE                     | "Windows"                       |
| VALUE_PREFIX              | ""                              |
| VALUE_SUFFIX              | ""                              |
| FIELD10 = "Serial Number" |                                 |
| FIELD                     | "field10"                       |
| VALUE                     | "Computer.compSystem.serialNum" |
| VALUE_PREFIX              | ""                              |
| VALUE_SUFFIX              | ""                              |
| ITEM CATEGORY             | Software                        |
| FIELD1 = "Path"           |                                 |
| FIELD                     | "field1"                        |
| VALUE                     | "software.path"                 |
| VALUE_PREFIX              | ""                              |
| VALUE_SUFFIX              | ""                              |
| FIELD3 = "Version"        |                                 |
| FIELD                     | "field3"                        |
| VALUE                     | "FileInfo.version"              |
| VALUE_PREFIX              | ""                              |
| VALUE_SUFFIX              | ""                              |

## LANrev 5.1

| ITEM CATEGORY  | Hardware                 |
|----------------|--------------------------|
| FIELD1 = "CPU" |                          |
| FIELD          | "field1"                 |
| VALUE          | "hardware_info.CPUSpeed" |
| VALUE_PREFIX   | ""                       |
| VALUE_SUFFIX   | "Mhz"                    |

| ITEM CATEGORY              | Hardware                           |
|----------------------------|------------------------------------|
| FIELD2 = "RAM" --          |                                    |
| FIELD                      | "field2"                           |
| VALUE                      | "hardware_info.PhysicalMemorySize" |
| VALUE_PREFIX               | ""                                 |
| VALUE_SUFFIX               | "B"                                |
| FIELD3 = "MAC Address"     |                                    |
| FIELD                      | "field3"                           |
| VALUE                      | "hardware_info.PrimaryMACAddress"  |
| VALUE_PREFIX               | ""                                 |
| VALUE_SUFFIX               | ""                                 |
| FIELD4 = "Network Address" |                                    |
| FIELD                      | "field4"                           |
| VALUE                      | "network_adapter_info.IPAddress"   |
| VALUE_PREFIX               | ""                                 |
| VALUE_SUFFIX               | ""                                 |
| FIELD5 = "Network Name"    |                                    |
| FIELD                      | "field5"                           |
| VALUE                      | "network_adapter_info.WinHost"     |
| VALUE_PREFIX               | ""                                 |
| VALUE_SUFFIX               | ""                                 |
| FIELD10 = "Serial Number"  |                                    |
| FIELD                      | "field10"                          |
| VALUE                      | "hardware_info.MachineSerialno"    |
| VALUE_PREFIX               | ""                                 |
| VALUE_SUFFIX               | ""                                 |

## LOGInventory 4.3+

| ITEM CATEGORY  | Hardware         |
|----------------|------------------|
| FIELD1 = "CPU" |                  |
| FIELD          | "field1"         |
| VALUE          | "LI_CUP.LI_NAME" |
| VALUE_PREFIX   | ""               |
| VALUE_SUFFIX   | ""               |

| ITEM CATEGORY              | Hardware                 |
|----------------------------|--------------------------|
| FIELD2 = "RAM" --          |                          |
| FIELD                      | "field2"                 |
| VALUE                      | "LI_SYSTEM.LI_PCMEMORY"  |
| VALUE_PREFIX               | ""                       |
| VALUE_SUFFIX               | "MB"                     |
| FIELD3 = "MAC Address"     |                          |
| FIELD                      | "field3"                 |
| VALUE                      | "LI_NET.LI_MACADDRESS"   |
| VALUE_PREFIX               | ""                       |
| VALUE_SUFFIX               | ""                       |
| FIELD4 = "Network Address" |                          |
| FIELD                      | "field4"                 |
| VALUE                      | "LI_NET.LI_IPADDRESS"    |
| VALUE_PREFIX               | ""                       |
| VALUE_SUFFIX               | ""                       |
| FIELD5 = "Network Name"    |                          |
| FIELD                      | "field5"                 |
| VALUE                      | "LI_PCINFO.LI_PCNAME"    |
| VALUE_PREFIX               | ""                       |
| VALUE_SUFFIX               | ""                       |
| FIELD10 = "Serial Number"  |                          |
| FIELD                      | "field10"                |
| VALUE                      | "LI_SYSTEM.LI_SERIAL"    |
| VALUE_PREFIX               | ""                       |
| VALUE_SUFFIX               | ""                       |
| Item Category              | Software                 |
| FIELD3 = "Version"         |                          |
| FIELD                      | "field3"                 |
| VALUE                      | "LI_SOFTWARE.LI_VERSION" |
| VALUE_PREFIX               | ""                       |
| VALUE_SUFFIX               | ""                       |

## Manage Engine Desktop Central 7.0

| Item Category              | Hardware                          |
|----------------------------|-----------------------------------|
| FIELD2 = "RAM"             |                                   |
| FIELD                      | "field2"                          |
| VALUE                      | "invcomputer.TOTAL_RAM_MEMORY_MB" |
| VALUE_PREFIX               | "MB"                              |
| VALUE_SUFFIX               | ""                                |
| FIELD3 = "MAC Address"     |                                   |
| FIELD                      | "field3"                          |
| VALUE                      | "resourcemacip.MAC_ADDRESS"       |
| VALUE_PREFIX               | ""                                |
| VALUE_SUFFIX               | ""                                |
| FIELD4 = "Network Address" |                                   |
| FIELD                      | "field4"                          |
| VALUE                      | "resourcemacip.IP_ADDRESS"        |
| VALUE_PREFIX               | ""                                |
| VALUE_SUFFIX               | ""                                |
| FIELD10 = "Serial Number"  |                                   |
| FIELD                      | "field10"                         |
| VALUE                      | "invcomputeros.SERIAL_NUMBER"     |
| VALUE_PREFIX               | ""                                |
| VALUE_SUFFIX               | ""                                |
| Item Category              | Software                          |
| FIELD3 = "Version"         |                                   |
| FIELD                      | "field3"                          |
| VALUE                      | "invsw.SOFTWARE_VERSION"          |
| VALUE_PREFIX               | ""                                |
| VALUE_SUFFIX               | ""                                |

## Microsoft SMS 2003 SP1 and Microsoft SCCM 2007

| Item Category  | Hardware |
|----------------|----------|
| FIELD1 = "CPU" |          |
| FIELD          | "field1" |

| Item Category              | Hardware                              |
|----------------------------|---------------------------------------|
| VALUE                      | "Processor_DATA.currentClockSpeed0"   |
| VALUE_PREFIX               | ""                                    |
| VALUE_SUFFIX               | "MHz"                                 |
| FIELD2 = "RAM"             |                                       |
| FIELD                      | "field2"                              |
| VALUE                      | "PC_Memory_DATA.totalPhysicalMemory0" |
| VALUE_PREFIX               | ""                                    |
| VALUE_SUFFIX               | "B"                                   |
| FIELD3 = "MAC Address"     |                                       |
| FIELD                      | "field3"                              |
| VALUE                      | "Network_DATA.macaddress0"            |
| VALUE_PREFIX               | ""                                    |
| VALUE_SUFFIX               | ""                                    |
| FIELD4 = "Network Address" |                                       |
| FIELD                      | "field4"                              |
| VALUE                      | "Network_DATA.ipaddress0"             |
| VALUE_PREFIX               | ""                                    |
| VALUE_SUFFIX               | ""                                    |
| FIELD5 = "Network Name"    |                                       |
| FIELD                      | "field5"                              |
| VALUE                      | "Computer_System_DATA.propName0"      |
| VALUE_PREFIX               | ""                                    |
| VALUE_SUFFIX               | ""                                    |
| FIELD6 = "Platform"        |                                       |
| FIELD                      | "field6"                              |
| VALUE                      | "Windows"                             |
| VALUE_PREFIX               | ""                                    |
| VALUE_SUFFIX               | ""                                    |
| FIELD10 = "Serial Number"  |                                       |
| FIELD                      | "field10"                             |
| VALUE                      | ""                                    |
| VALUE_PREFIX               | ""                                    |
| VALUE_SUFFIX               | ""                                    |

| Item Category      | Hardware                            |
|--------------------|-------------------------------------|
| ITEM CATEGORY      | Software                            |
| FIELD3 = "Version" |                                     |
| FIELD              | "field3"                            |
| VALUE              | "SoftwareProductMap.productVersion" |
| VALUE_PREFIX       | ""                                  |
| VALUE_SUFFIX       | ""                                  |

## Spiceworks 4.0, 5.0

| Item Category              | Hardware                 |
|----------------------------|--------------------------|
| FIELD1 = "CPU"             |                          |
| FIELD                      | "field1"                 |
| VALUE                      | "devices.processor_type" |
| VALUE_PREFIX               | ""                       |
| VALUE_SUFFIX               | ""                       |
| FIELD2 = "RAM"             |                          |
| FIELD                      | "field2"                 |
| VALUE                      | "devices.memory"         |
| VALUE_PREFIX               | ""                       |
| VALUE_SUFFIX               | "B"                      |
| FIELD3 = "MAC Address"     |                          |
| FIELD                      | "field3"                 |
| VALUE                      | "devices.mac_address"    |
| VALUE_PREFIX               | ""                       |
| VALUE_SUFFIX               | ""                       |
| FIELD4 = "Network Address" |                          |
| FIELD                      | "field4"                 |
| VALUE                      | "devices.ip_address"     |
| VALUE_PREFIX               | ""                       |
| VALUE_SUFFIX               | ""                       |
| FIELD5 = "Network Name"    |                          |
| FIELD                      | "field5"                 |
| VALUE                      | "devices.name"           |
| VALUE_PREFIX               | ""                       |



| Item Category             | Hardware                         |
|---------------------------|----------------------------------|
| VALUE_SUFFIX              | ""                               |
| FIELD10 = "Serial Number" |                                  |
| FIELD                     | "field10"                        |
| VALUE                     | "devices.serial_number"          |
| VALUE_PREFIX              | ""                               |
| VALUE_SUFFIX              | ""                               |
| Item Category             | Printers & Scanners              |
| FIELD5 = "IP Address"     |                                  |
| FIELD                     | "field5"                         |
| VALUE                     | "devices.ip_address"             |
| VALUE_PREFIX              | ""                               |
| VALUE_SUFFIX              | ""                               |
| FIELD6 = "Serial Number"  |                                  |
| FIELD                     | "field6"                         |
| VALUE                     | "devices.serial_number"          |
| VALUE_PREFIX              | ""                               |
| VALUE_SUFFIX              | ""                               |
| Item Category             | Network Infrastructure           |
| FIELD5 = "IP Address"     |                                  |
| FIELD                     | "field5"                         |
| VALUE                     | "devices.ip_address"             |
| VALUE_PREFIX              | ""                               |
| VALUE_SUFFIX              | ""                               |
| FIELD6 = "Serial Number"  |                                  |
| FIELD                     | "field6"                         |
| VALUE                     | "devices.serial_number"          |
| VALUE_PREFIX              | ""                               |
| VALUE_SUFFIX              | ""                               |
| Item Category             | Software                         |
| FIELD3 = "Version"        |                                  |
| FIELD                     | "field3"                         |
| VALUE                     | "software_installations.version" |
| VALUE_PREFIX              | ""                               |

| Item Category | Hardware |
|---------------|----------|
| VALUE_SUFFIX  | ""       |

## ZENworks Asset Management 6.5+

| Item Category              | Hardware                      |
|----------------------------|-------------------------------|
| FIELD1 = "CPU"             |                               |
| FIELD                      | "field1"                      |
| VALUE                      | "NC_CPU.speed"                |
| VALUE_PREFIX               | ""                            |
| VALUE_SUFFIX               | "MHz"                         |
| FIELD2 = "RAM"             |                               |
| FIELD                      | "field2"                      |
| VALUE                      | "NC_Workstation.totalMemory"  |
| VALUE_PREFIX               | ""                            |
| VALUE_SUFFIX               | "MB"                          |
| FIELD3 = "MAC Address"     |                               |
| FIELD                      | "field3"                      |
| VALUE                      | "NC_Workstation.lanaddress"   |
| VALUE_PREFIX               | ""                            |
| VALUE_SUFFIX               | ""                            |
| FIELD4 = "Network Address" |                               |
| FIELD                      | " field4"                     |
| VALUE                      | " NC_Workstation.ipaddress"   |
| VALUE_PREFIX               | ""                            |
| VALUE_SUFFIX               | ""                            |
| FIELD5 = "Network Name"    |                               |
| FIELD                      | " field5"                     |
| VALUE                      | " NC_Workstation.machinename" |
| VALUE_PREFIX               | ""                            |
| VALUE_SUFFIX               | ""                            |
| FIELD6 = "Platform"        |                               |
| FIELD                      | "field6"                      |
| VALUE                      | "Windows"                     |
| VALUE_PREFIX               | ""                            |

| Item Category             | Hardware                      |
|---------------------------|-------------------------------|
| VALUE_SUFFIX              | ""                            |
| FIELD10 = "Serial Number" |                               |
| FIELD                     | "field10"                     |
| VALUE                     | "NC_Workstation.serialNumber" |
| VALUE_PREFIX              | ""                            |
| VALUE_SUFFIX              | ""                            |
| Item Category             | Software                      |
| Item Category             | Software                      |
| FIELD3 = "Version"        |                               |
| FIELD                     | "field3"                      |
| VALUE                     | "NC_Product.model"            |
| VALUE_PREFIX              | ""                            |
| VALUE_SUFFIX              | ""                            |

## Zenworks Configuration Management 11.1

| Item Category              | Hardware                     |
|----------------------------|------------------------------|
| FIELD1 = "CPU"             |                              |
| FIELD                      | "field1"                     |
| VALUE                      | "NC_CPU.speed"               |
| VALUE_PREFIX               | ""                           |
| VALUE_SUFFIX               | "MHz"                        |
| FIELD2 = "RAM"             |                              |
| FIELD                      | "field2"                     |
| VALUE                      | "NC_Workstation.totalMemory" |
| VALUE_PREFIX               | ""                           |
| VALUE_SUFFIX               | "MB"                         |
| FIELD3 = "MAC Address"     |                              |
| FIELD                      | "field3"                     |
| VALUE                      | "NC_Workstation.lanaddress"  |
| VALUE_PREFIX               | ""                           |
| VALUE_SUFFIX               | ""                           |
| FIELD4 = "Network Address" |                              |
| FIELD                      | " field4"                    |

| <b>Item Category</b>        | <b>Hardware</b>               |
|-----------------------------|-------------------------------|
| VALUE                       | " NC_Workstation.ipaddress"   |
| VALUE_PREFIX                | ""                            |
| VALUE_SUFFIX                | ""                            |
| FIELD5 = "Network Name"     |                               |
| FIELD                       | " field5"                     |
| VALUE                       | " NC_Workstation.machinename" |
| VALUE_PREFIX                | ""                            |
| VALUE_SUFFIX                | ""                            |
| FIELD7 = "OS Version"       |                               |
| FIELD                       | "field7"                      |
| VALUE                       | " NC_Workstation.osmodel"     |
| VALUE_PREFIX                | ""                            |
| VALUE_SUFFIX                | ""                            |
| FIELD10 = "Serial Number"   |                               |
| FIELD                       | "field10"                     |
| VALUE                       | "NC_Workstation.serialnumber" |
| VALUE_PREFIX                | ""                            |
| VALUE_SUFFIX                | ""                            |
| Item Category               | Software                      |
| FIELD20 = "Platform String" |                               |
| FIELD                       | "field10"                     |
| VALUE                       | "NC_Workstation.osproduct"    |
| VALUE_PREFIX                | ""                            |
| VALUE_SUFFIX                | ""                            |
| Item Category               | Software                      |
| Item Category               | Software                      |
| FIELD3 = "Version"          |                               |
| FIELD                       | "field3"                      |
| VALUE                       | "NC_Product.model"            |
| VALUE_PREFIX                | ""                            |
| VALUE_SUFFIX                | ""                            |

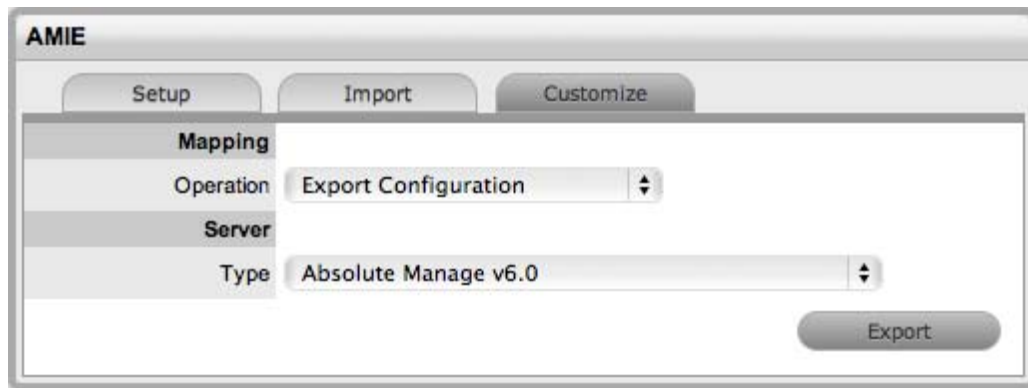
## 5.13.2 AMIE Customized Mapping

The customized mapping functionality provides the Administrator with greater control over the Item Types and Categories information accessed during the Item import process. It allows the Administrator to customize queries by defining parameters for importing Items.

### Export Configuration

Prior to importing Items, to define the parameters of the Items to be imported, the Item parameters must be exported to a file. To export the parameters file:

1. Log in as an Administrator
2. Select Setup > Item Import > Customize



3. From the Mapping Operation drop-down list, select Export Configuration
4. Select the Server Type for the configuration export
5. Click Export.

An .xml file is produced.

### Customizing the XML File

To customize the Item import, the above exported configuration file will need to be modified. To modify the file:

1. In the text editor of your choice, open the XML file
2. Modify the properties as required.

The example below explains how the Centennial 2006 6.1 configuration can be customized.

### Server Type Identifier

The first line within the XML file displays the following three fields:

```
<IMPORT_DEFN SERVER="Centennial" VERSION="2006 6.1" AUTHOR="LiveTime Software Inc.">
```

They identify an entry for an Asset Management Server type. By modifying these fields, we can effectively create another configuration for Centennial 2006 6.1, for example:

```
<IMPORT_DEFN SERVER="Centennial" VERSION="2006 6.1 (Bob's Config)" AUTHOR="Bob">
```

This newly configured name will be the Server Type listed as an option when setting up AMIE.

## Item Categories

The configuration mapping file is divided into "blocks" of Item Categories. In each block, we define a number of instructions to execute during AMIE's import process.

For example:

```
<ITEM CATEGORY="Hardware" ID_KEY_FORMAT="Client.Client">
```

"ITEM CATEGORY" instructs AMIE to import all items within the defined XML block, as generic "Hardware". If we wanted to be more specific about our import for Hardware, we could break this down into sub-categories, for example: "Computer", "Printer", and "Network Peripheral".

Assuming the selected Asset Management Server supports the inventory control of these individual categories, defining an XML block for each category would allow the Administrator to import each Hardware Item as a "Computer", "Printer" or "Network Peripheral".

The "r;ID\_KEY\_FORMAT" attribute is simply used to illustrate the format of the primary key field for this category in the Asset Management database. In the example, "Client.Client" says that the "Client" column of the "Client" table will contain the primary key for our Hardware.

---

**NOTE:** Note that this only affects systems that support the feature of manually editing the Item Number field (when the Setup > Privileges > System > Edit Item Numbers option is enabled). In order to use editable Item numbers when AMIE is enabled, the 'Edit Asset Mgmt IDs' option must also be set to "Yes".

---

## Item Properties

Item Properties are typically the fields used to describe the Item Details, such as "CPU", "RAM", "Serial Number" etc. The instructions to retrieve property data are defined in the "<QUERY ...>" and "<ITEM\_PROPERTY ...>" elements.

### "<QUERY >" Element :

Define the 'Query' property to locate the table data.

For example, the query below will retrieve the 'CPU' data for Hardware. The Query Name (cpu) is used to reference the property field as described later.

```
<QUERY NAME="cpu">SELECT cpu FROM com.livetime.assetimport.Hardware cpu WHERE  
cpu.propClient = :ASSETID and cpu.propHardwareType = 4</QUERY>
```

### "<ITEM\_PROPERTY>" Element:

Define the 'Item Property' to extract column data for the above Query.

Each of these entries maps an Item property, from the Asset Management Server to the service management system. For example, the value in the CPU field of the Asset Management Server will be mapped to the CPU field of the application database.

```
<ITEM_PROPERTY FIELD="field1"VALUE_PREFIX=""  
VALUE="cpu.propASize"VALUE_SUFFIX="MHz" TYPE="LOOKUP" />
```

Below is an explanation for each of these attributes:

| Attribute           | Description   |
|---------------------|---|
| ITEM_PROPERTY_FIELD | <p>This is the name of the field that exists in the system database. The field "field1" for the "Hardware" Item Category maps to the "CPU" field.</p> <p>For a current Entity- Relationship Diagram that includes these database fields, please contact your local support contact.</p>   |
| VALUE_PREFIX        | <p>This will prefix the actual value returned from the Asset Management Server database.</p>  |
| VALUE               | <p>This value can either be a hard-coded value, or a value the Administrator wants to import from the Asset Management Server database (see: TYPE attribute below)</p> <p>For the latter, we define a string using the query.property notation, which will reference the actual value in the database.</p> <p>In our example, our <i>VALUE</i> attribute is "cpu.propAsize".</p> <ul style="list-style-type: none"> <li>♦ "cpu" - the query name where our results are contained, the "Hardware" table.</li> <li>♦ "propAsize" - the property name, where the actual cpu value is stored, the "SIZE" column.</li> </ul> <p>In most cases, the property name is identical to the database column name, with the first letter capitalized followed by lower-case. Property names are always pre-appended with the word "prop", to ensure uniqueness in the import process.</p> <p>Take this into consideration when defining custom properties.</p> |
| VALUE_SUFFIX        | <p>This will suffix the actual value returned from the Asset Management Server database. In our example, we set it to "Mhz", as it is the CPU field.</p> <p>Suffixing "Mhz" in this case gives the imported value more meaning.</p>   |
| TYPE                | <p>"LOOKUP" - retrieves the data from the VALUE attribute as specified using the query.property notation.</p> <p>"QUOTED" - treats the VALUE attribute as a hard-coded value.</p>   |

---

**NOTE:** Query entries allow AMIE to retrieve necessary data from the Asset Management Server database. AMIE queries are written in a query language called HQL, which is similar to SQL. For more information on HQL and some examples on how to write HQL queries, see: [http://www.hibernate.org/hib\\_docs/reference/en/html/queryhql.html](http://www.hibernate.org/hib_docs/reference/en/html/queryhql.html)

---

Item Relationships

When defining multiple Item Category types to import, for example Hardware and Software, an Administrator can specify how they are related. Configuring these properties will allow Items to be imported with predefined relationships.

---

**NOTE:** It is important to note that children should only ever contain this information, as relationships are defined from the bottom up.

---

In this example, the Centennial 2006 6.1 Software Relationship block is as follows:

```
<RELATIONSHIP RELATED_TO="Hardware" TO="is a parent of" NAME="Parent of / Child of"
FROM="is a child of" CLASS="1000" INHERIT_OWNERSHIP="1">
<NATIVE_ID_QUERY>SELECT computer.client FROM com.livetime.assetimport.Client computer
WHERE computer.propAddress is not null and computer.client :SW_ASSETID.0</
NATIVE_ID_QUERY>
</RELATIONSHIP>
```

This "Parent of / Child of" relationship already exists as one of the factory supplied relationship types. However any newly defined relationships can be mapped and created as part of the import process.

The attributes and child elements are explained as follows:

| Attribute         | Description  |
|-------------------|--|
| RELATED_TO        | The Item Category another Item Category can relate to. For example "Software" is to be related to "Hardware".  |
| TO                | A label describing the relationship from the parent to the child.<br><br>For example: [Hardware] is a parent of [Software]   |
| NAME              | The name of the relationship.  |
| FROM              | A label describing the relationship from the child to the parent.<br><br>For example: [Software] is a child of [Hardware]  |
| CLASS             | "1000" - Hierarchical-based relationship.<br><br>"2000" - Connection-based relationship.   |
| INHERIT_OWNERSHIP | "1" - Propagates ownership data (customer and organizational unit) from each parent Item to all of its children.<br><br>"0" - Relationship does not inherit parent ownership data. |

## Upload / Edit the XML Configuration

Once the XML has been customized it needs to be imported back into the system to enable the application to import Items using the new specifications.

To import the XML:

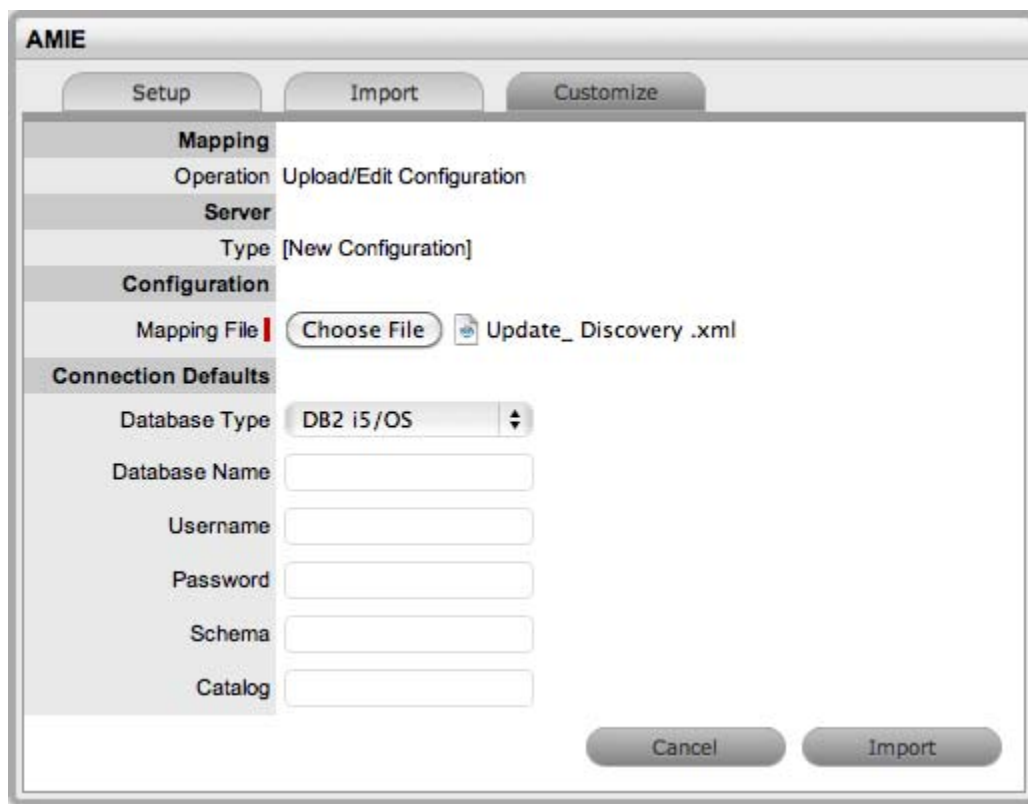
1. Log in as an Administrator



2. Select Setup > Item Import > Customize
3. From the Mapping Operation drop-down list, select Upload/Edit Configuration



4. Select [New Configuration] in the Type list
5. Click New
6. Select Choose File
7. Search and upload the XML file



8. Enter Connection Default values for the database type, name, username, password, schema and catalog, if necessary  
These will be the pre-set values when selecting and mapping the new Server Type.
9. Click Import button to import the XML file  
When the import is complete, the new configuration file will appear as a new Server Type.

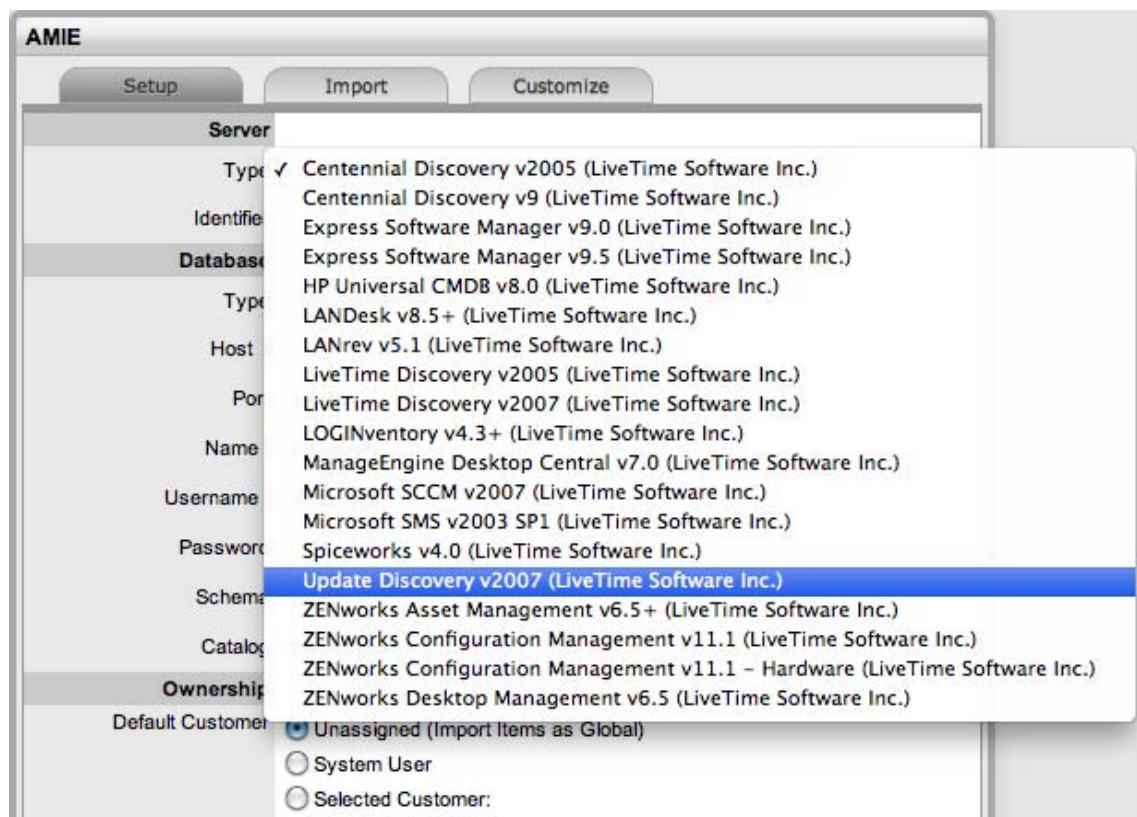
10. The Server Connection Details can be modified or updated by clicking Edit and making the required changes
11. Click Save.

## Using the customized Server Type

Once a new Server configuration has been imported into the system, it can be selected as an option when configuring AMIE in the Setup tab.

To use the new Server Type:

1. Log in as an Administrator
2. Select Setup > Item Import > Setup
3. Select the System Type as Database Mapping (AMIE)
4. From the Server Type list select the customized server



5. Configure the database connect, ownership and synchronization period
6. Click Test to confirm the connection then Save when complete.

For more information on importing Items via AMIE, see: [Importing Items Using Database Mapping](#).

### 5.13.3 Managing Items using Database Mapping (AMIE)

Within the CMDB Import screen multiple asset management datasources can be synchronized with the service management system. When one or more applications are configured within AMIE, a list is displayed within the AMIE Setup tab.

The screenshot shows the AMIE application interface. At the top, there are three tabs: 'Setup', 'Import', and 'Customize'. Below these are two buttons: 'New' and 'Delete'. The main area contains a table with the following data:

| Server  | Identifier | Last Updated   |
|---|------------|----------------|
| ZENworks Configuration Management v11.1 (LiveTime Software Inc.)            | Blue       | 04/16/12 15:52 |
| ZENworks Configuration Management v11.1 - Hardware (LiveTime Software Inc.) | Green      |                |

At the bottom of the table area, there is a button labeled '1 - 2 of 2 Results'.

## Importing Items Using Database Mapping

To import Items using Database Mapping, the following configuration steps need to be completed:

1. Select Setup>AMIE
2. Click New

The Server, Database, Ownership and Synchronization fields appear.

The screenshot shows the AMIE configuration window with the following settings:

- Server**
  - Type: LiveTime Discovery v2007 (LiveTime Software Inc.)
  - Identifier: (empty)
- Database**
  - Type: SQLServer
  - Host: (empty)
  - Port: 1433
  - Name: discovery
  - Username: discovery
  - Password: (empty)
  - Schema: dbo
  - Catalog: Discovery
- Ownership**
  - Default Customer:  Unassigned (Import Items as Global),  System User,  Selected Customer:
  - Ignore Domain Info:
- Synchronization**
  - Auto Create New Items: Yes/No (No is selected)
  - Frequency: Never

Buttons at the bottom: Test, Cancel, Save.

---

### Configuration

---

|             |  |
|-------------|--|
| System Type | Define the system type as Database Mapping.  |
| Identifier  | An identifying label that is used in List Views to inform Users regarding the Source of an Item. |
| Server      |  |
| Type        | Select the Type of inventory management product.   |
| Database    |  |
| Type        | Select the Database Type.  |
| Host        | Enter the Host name or IP Address.   |
| Port        | Enter the Port Number for the database server.   |

---

---

## Configuration

---

|   |   |
|---|---|
| Name  | Enter the Database name.  |
| Username  | Complete User name details.   |
| Password  | Complete Password details.  |
| Schema  | Enter the Schema type.  |
| Catalog   | Enter the Catalog name. Typically this would be the name of the Database.   |
| Notification (Only If 'Control CMS via RFC' is enabled) |   |
| Email RFC's to Tech?                                    | Select this option if technicians are to be notified of generated change requests.  |
| Ownership   |   |
| Unassigned (Import Items as Global)                     | Select this option if Items are to be globally owned.   |
| System User   | Select this option to assign imported Items to the System User.   |
| Selected Customer                                       | Select this option to assign imported Items to a specific Customer.   |
| Ignore Domain Info                                      | Tick this field if the system is to disregard domain details attached to the User Name inside the AMIE source when assigning an owner.  |
| Synchronization   |   |
| Auto Create New Items                                   | <p>This option is only visible when a single AMIE source is defined within AMIE. When enabled, Items are automatically created upon synchronization, relative to the Control CMS via RFC setting within the Setup&gt;Privileges&gt;Requests tab .</p> <p>If disabled, a snapshot of imported asset information is listed within the Super&gt;Configuration&gt;AMIE Snapshots tab.</p> |
| Frequency   | <p>Choose a synchronization interval. This can be left as Never if the database will be synchronized manually.</p> <p><b>NOTE:</b> Synchronization times will vary depending on the connection speed with the external service and the database size.</p>   |

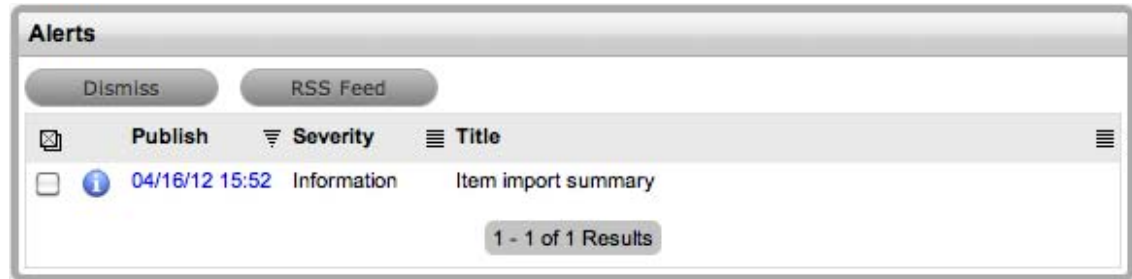
---

3. Click Test, to initiate a connection and test the setup

If a connection is not made, a system message will advise which part of the configuration was not successful.

4. Click Save
5. To execute the import, click the Import button
6. After the import is complete, an Alert appears providing results of the import.

Click on the Publish link to read the Alert details.



## AMIE Import Alert

Alerts are generated for the Admin User after the AMIE synch is completed. The import alert summary displays:

- ♦ the details of the system that the synchronization was run against, as it is possible to import from multiple sources.
- ♦ the number of assets found in the datasource.
- ♦ the number of assets automatically created if a single datasource is configured in AMIE and the auto-create option is enabled; or if the Auto-Create option is disabled and Items already exists in the system, the number of Items that were updated.
- ♦ the number of AMIE Snapshots successfully imported, with a breakdown of new Items added and number of Items updated.

## Delete Options and AMIE

The options to delete AMIE configurations can be achieved through the List View on the AMIE Setup tab, or by clicking on the a hyperlink within the Server column within the List View, which displays the expanded Setup view for the specific asset management tool.

The Delete button clicked in the AMIE>Setup tab>List View results in Global level "delete" flags being applied to all AMIE-managed Items stored in the system, however it retains the server details configured in AMIE and their associated snapshots.

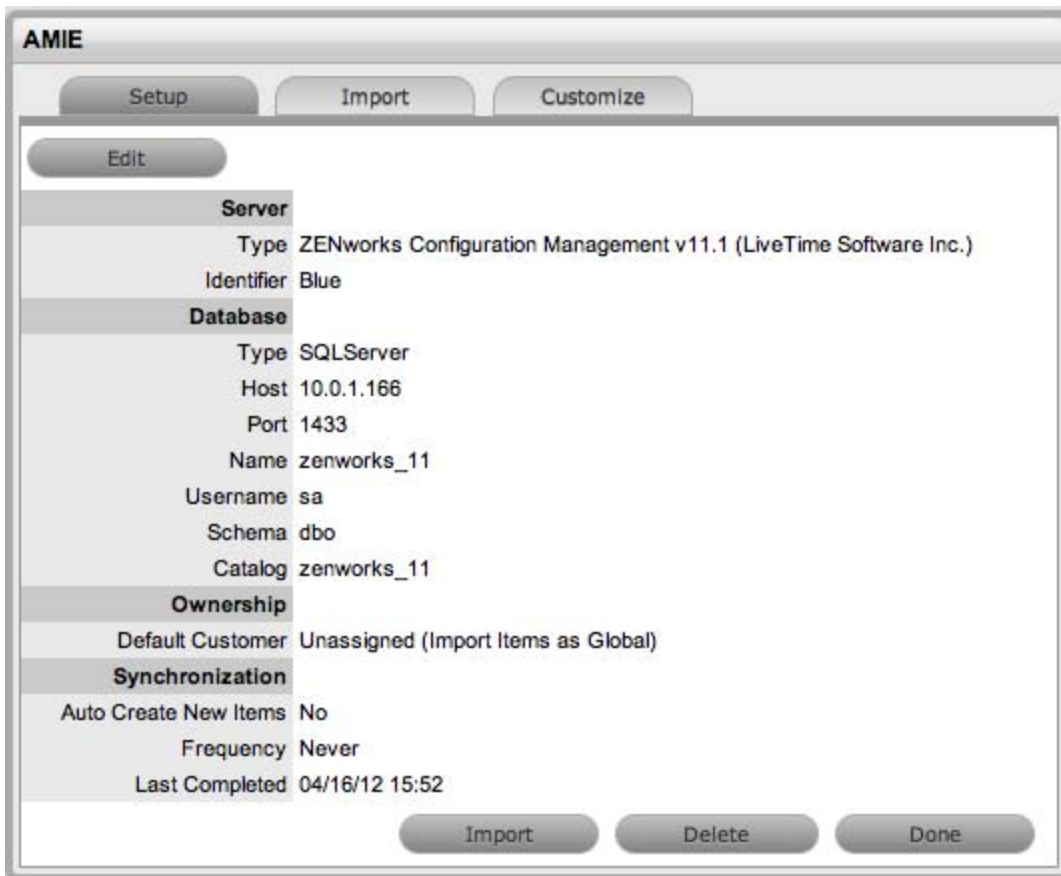
The imported Items that are deleted are not completely removed from the database but are flagged as not available . By not erasing the Items completely, the historical data is maintained and allows these Items to be re-enabled in the future. It should be noted that the Item Types associated with the deleted imported Items are not disabled in the application.

The Delete button selected within the expanded Setup tab view for the specific asset management datasource, results in Configuration level deletion of the configured server and any related AMIE snapshots.

---

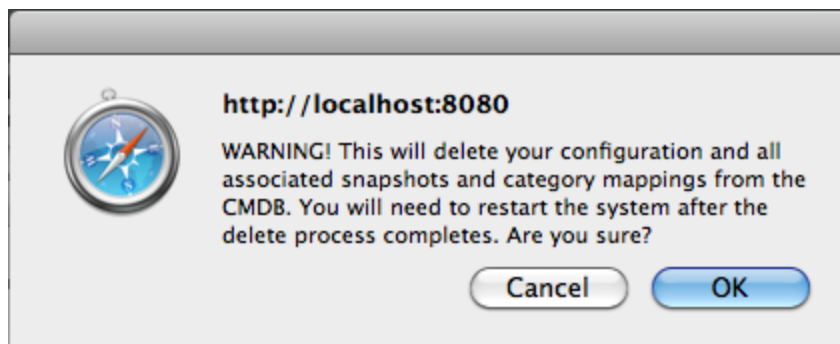
**NOTE:** The application must be restarted after the performance of either deletion operation, to allow the changes to take effect and prevent unpredictable behavior of the system.

---



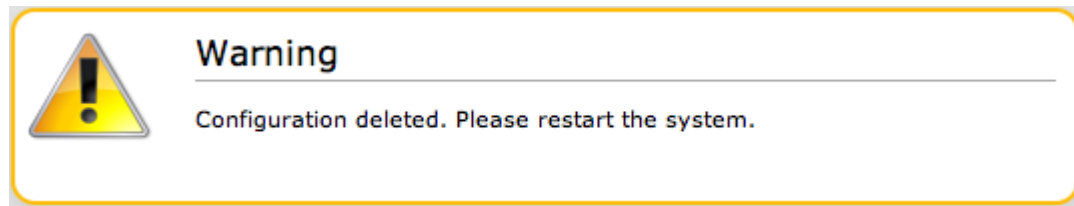
To delete the server configuration within AMIE and related snapshots:

1. Select Setup>AMIE>Setup
2. Select the Server link option within the AMIE list view  
The expanded Setup screen is displayed with the Delete button.
3. Select the Delete button  
A pop-up message is displayed asking your to confirm the deletion action.



4. Click OK.

A warning message is displayed informing you to restart the application server to complete the deletion process.



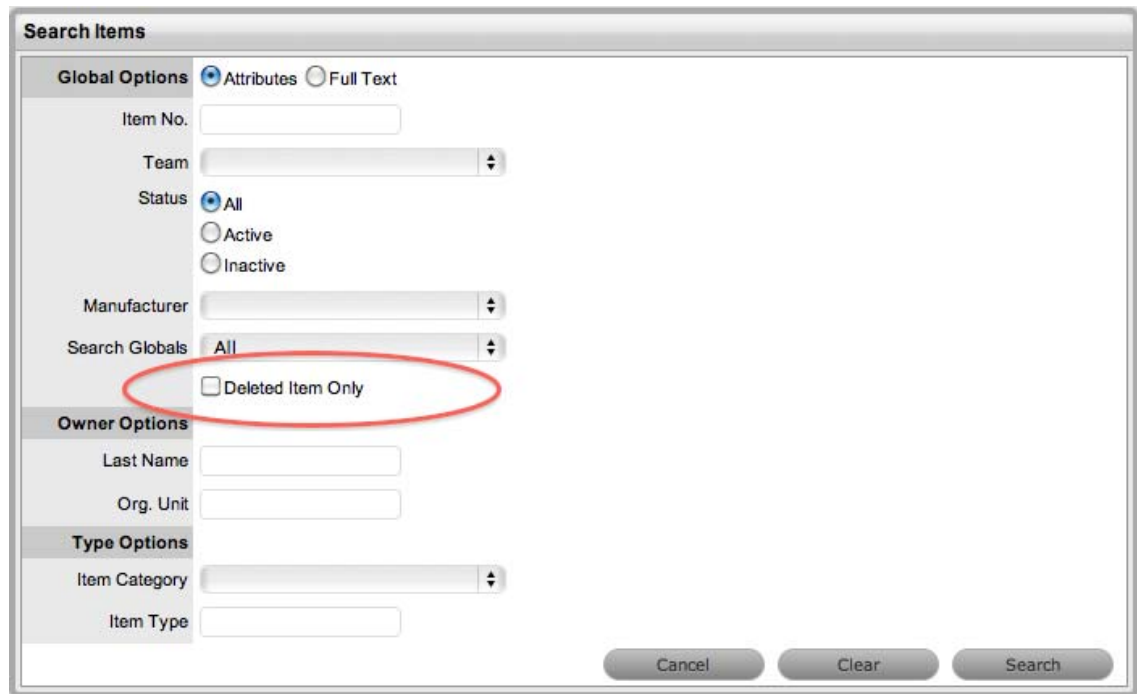
## Re-enabling Deleted Items

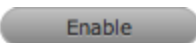
To re-enable Deleted Items, initiate an Item search on deleted Items within the Configuration>Items screen of the Supervisor view.

Within the Supervisor view to search for a deleted Item:

1. Select Configuration>Items
2. Click the Search button

A simple search page will be displayed

A screenshot of the "Search Items" dialog box. It has a sidebar with sections: "Global Options" (radio buttons for "Attributes" and "Full Text"), "Item No." (text input), "Team" (dropdown), "Status" (radio buttons for "All", "Active", "Inactive"), "Manufacturer" (dropdown), "Search Globals" (dropdown), "Owner Options" (text inputs for "Last Name" and "Org. Unit"), "Type Options" (dropdown for "Item Category" and text input for "Item Type"), and "Deleted Item Only" (checkbox). The "Deleted Item Only" checkbox is circled in red. At the bottom right are "Cancel", "Clear", and "Search" buttons.

3. Enter a search term
4. Select the Deleted Item Only option
5. Click Search  
A list of Items is displayed.
6. For the Item to be re-enabled, select the Item ID#
7. Click  .



## 5.13.4 Importing Items using a .CSV File

To import Items using a .CSV file, a .CSV template, containing all available fields, can be downloaded and populated. The service management system uses a field mapping Wizard to match fields in the template to those in the system. To download the template go to Setup > Item Import > Import. See [Downloading an Item .CSV Template](#) for more information on configuring the .CSV file.

### Before Importing a CSV File

For an Item to be successfully imported, the following fields must be mapped:

- ◆ Team/s
- ◆ Status.

*The Teams within the .CSV file must be created in the system before they can be associated with an Item as part of a .CSV import. Teams are created by a Supervisor under the User>Teams tab.*

Items are imported based on Category (i.e. Hardware, Software, etc.), which must be configured by the Supervisor within the Configuration>Categories tab before conducting a .CSV import. The Categories configuration defines the Details recorded in the Item to be imported into the system. The Administrator must create separate .CSV files based on the Categories configured, that are then individually uploaded into the application.

For Items imported with owners, the Username in the .CSV file must match the Username within the support system. If the owner does not exist in the system, the imported Item will become a Global Item.

---

**NOTE:** If relationships are to be created between Items upon import, Parent Items should be imported first. If the system generated Item Number is to be used for the Parent Item, it needs to be included in the Parent Item Number field of the Related Items when they are imported.

---

### Importing Items

To import a CSV File using the Import Wizard:

1. Select Setup>AMIE
2. Select the Import tab



To access a template that illustrates the fields the application maps and the data types (see below), click the Download Template link on the Item Import Wizard screen within the Setup>AMIE>Import tab.

The following fields should be visible:

Item Number(Unique char 64),Item Type(char 128),Manufacturer(char 128),Incident Team(char 64),Problem Team(char 64),Change Team(char 64),Request Team(char 64), Company(char 128),Department(char 128),Room(char 64),Username (char 64),Status(char 128),Criticality(char 64)Purchase Date(datetime),Cost(decimal),Field1(char 256),Field2(char 256),Field3(char 256),Field4(char 256),Field5(char 256),Field6(char 256),Field7(char 256),Field8(char 256),Field9(char 256), Field10(char 256),Field11(char 256),Field12(char 256),Field13(char 256),Field14(char 256),Field15(char 256),Field16(char 256),Field17(char 256),Field18(char 256),Field19(char 256),Field20(char 256),Notes(CLOB),Relationship Name(char 256),Parent Item Number(char 64)

The char ### designation in parentheses after each field name signifies what type of data the import utility expects to see in each field. For instance:

- ◆ Item Type (char 128) means that the first name field cannot exceed 128 characters.
- ◆ Fields marked as Unique must be unique in the system.
- ◆ Note the Room details MUST be in the following format: COMPANY-DEPARTMENT;Room

When creating a .CSV file for a Category, to determine the Field number of a configured Custom Field, within the [Category](#) tab of an Item Category select the System defined Ordering option. The field labels will then be listed in sequential order from one to twenty.

3. To import, select the Item Category

The drop-down list consists of all Categories created by the Supervisor in Configuration>Categories.

4. Enter the file location, or use the Browse button

5. Select Upload

The Field Mapping Wizard appears. Fields that can be mapped to the CSV file are available in the drop-down list.

## Field Mapping Wizard

Select the fields you wish to map to the internal database records.



| General         |                                   |
|-----------------|-----------------------------------|
| Item Number     | [0] Item Number(Unique char 64) ▾ |
| Username        | [11] Username (char 128) ▾        |
| Item Type I     | [1] Item Type(char 128) ▾         |
| Manufacturer I  | [2] Manufacturer(char 64) ▾       |
| Incident Team I | [3] Incident Team(char 64) ▾      |
| Problem Team I  | [4] Problem Team(char 64) ▾       |
| Change Team I   | [5] Change Team(char 64) ▾        |
| Request Team I  | [6] Request Team(char 64) ▾       |
| Criticality     | [13] Criticality(char 64) ▾       |
| Status I        | [12] Status(char 64) ▾            |

| Details         |                         |
|-----------------|-------------------------|
| CPU             | [17] Field1(char 128) ▾ |
| RAM             | [18] Field2(char 128) ▾ |
| MAC Address     | [19] Field3(char 128) ▾ |
| Network Address | [20] Field4(char 128) ▾ |
| Network Name    | [21] Field5(char 128) ▾ |
| Platform        | [22] Field6(char 128) ▾ |

| Relationships      |                                    |
|--------------------|------------------------------------|
| Relationship Name  | [38] Relationship Name(char 256) ▾ |
| Parent Item Number | [39] Parent Item Number(char 64) ▾ |

| General             |                                |
|---------------------|--------------------------------|
| Company I           | [8] Company(char 128) ▾        |
| Department I        | [9] Department(char 128) ▾     |
| Room I              | [10] Room(char 64) ▾           |
| Service Level       | [7] Service Level(char 256) ▾  |
| Date Format         | MM/dd/yy HH:mm                 |
| Contract Start Date | <not selected> ▾               |
| Contract End Date   | <not selected> ▾               |
| Purchase Date       | [14] Purchase Date(datetime) ▾ |
| Cost                | [15] Cost(decimal) ▾           |
| Monthly Cost        | [16] Monthly Cost(decimal) ▾   |
| Notes               | [37] Notes(CLOB) ▾             |

| Details         |                          |
|-----------------|--------------------------|
| OS Version      | [23] Field7(char 128) ▾  |
| Version         | [24] Field8(char 128) ▾  |
| Licenses        | [25] Field9(char 128) ▾  |
| Serial Number   | [26] Field10(char 128) ▾ |
| Platform String | [36] Field20(char 128) ▾ |

Options  Ignore First Line  
 Verbose Errors

**I** Fields that do not contain matching system records automatically create new records.

### 6. Review and map the fields within the .CSV

#### Field Mapping Wizard

##### General

|                 |  |
|-----------------|--|
| Item Number     | Unique Item number of the Configuration Item, this can be generated by the system or defined in the .CSV file. |
| Username        | Customer owning the Configuration Item, imported by entering their user name.                                  |
| Item Type II    | Item Type of the Configuration Item.   |
| Manufacturer I  | Sets the manufacturer details of the Item.   |
| Incident Team I | Incident Team assigned to the Configuration Item.  |

---

**Field Mapping Wizard**

---

|                     |  |
|---------------------|--|
| Problem Team I      | Problem Team assigned to the Configuration Item.   |
| Change Team I       | Change Team assigned to the Configuration Item.  |
| Request Team I      | Request Team assigned to the Configuration Item  |
| Criticality         | Sets the default Criticality (i.e, critical, high, moderate, low, very low) for the Item. Optional.                                |
| Status I            | Default Configuration Item Status.   |
| Company I           | Company owning the Configuration Item.   |
| Department I        | Department owning the Configuration Item.  |
| Room I              | The location of the Item. The .csv file data format to import this information MUST be:<br><br>COMPANY-DEPARTMENT;Room             |
| Service Level       | Configuration Item assigned SLA.   |
| Date Format         | Displays the date format required for the contract details to be imported successfully.  |
| Contract Start Date | Sets the start date of a contract associated with an Item.   |
| Contract End Date   | Sets the end date of a contract associated with an Item.   |
| Purchase Date       | Date the Item was purchased.   |
| Cost                | The cost of the Item.  |
| Monthly Cost        | Sets the monthly Service Cost on per month basis for the Item.   |
| Notes               | Free text to add notes to the Item. Optional.  |
| Details             |  |
| Fields 1 to 20      | Custom fields created for the Category are displayed and can be mapped to the Item based on information included in the .CSV file. |
| Relationships       |  |
| Relationship Name   | Defines the description of the relationship between the Item set in the following field.   |
| Parent Item Number  | Identifies the Item with which an Item is related using the Item Number.   |
| Options             |  |
| Ignore First Line   | Option to ignore first row upon import.  |
| Verbose Errors      | Detailed description of any errors that occur during the import process.   |

---

*I* = Information that needs to exist in the system before the import

*I* = Fields that are mandatory

---

**NOTE:** If relationships are to be created between Items upon import, Parent Items should be imported first. If the system generated Item Number is to be used for the Parent Item, it needs to be included in the Parent Item Number field of the Related Items when they are imported.

---

| Relationships      |                                    | <input type="checkbox"/> Verbose Errors  |
|--------------------|------------------------------------|--|
| Relationship Name  | [38] Relationship Name(char 256) ↓ | Fields that do not contain matching system records automatically create new records. |
| Parent Item Number | [39] Parent Item Number(char 64) ↓ |  |

1. Select the Ignore First Line checkbox if the first line of the imported CSV file has field headings  
Leave the checkbox clear if the CSV file begins with usable data.
2. Click Verbose Errors to record a detailed description of any errors that occur during the import  
Leaving the box unchecked will return a summarized error report.
3. Select Import to bring into the system the mapped field data  
The Item Import screen displays the results of the import.
4. Select Done.

## Configuring Items after the Import

During the Item Import, elements that do not exist in the database are created. These are the fields marked with a blue line within the Field Mapping Wizard:

- ◆ Item Type
- ◆ Warranty
- ◆ Organizational Units.

After an import, all Item Types that have been created will need to be further configured.

To complete Item Type configuration:

1. Log in to the Supervisor Portal
2. Select Configuration>Types
3. In the Item Types screen, click on the newly created Item  
The Type Information screen appears.
4. Complete the following fields:
- 5.



---



### Item Type

---

|               |  |
|---------------|--|
| Name          | Name of the Item Type.   |
| Manufacturer  | The manufacturer of the Item Type. New manufacturers can be created and existing manufacturers can be edited and deleted by using the Edit and New buttons that appear beside the drop-down menu of manufacturers. |
| Item Category | This signifies the type of Item. (Hardware, Software or Service are the default Types, but Users with the Supervisor Role can create more if required).  |

---

| Item Type      |  |
|----------------|--|
| Identifier     | <p>The drop-down list that appears is drawn from the fields defined for the Item Category selected. Although this information is not required, the Identifier is used to differentiate similar Items that may be in use throughout an organization. For example, if an organization uses the same printers for all departments, an Item Category field of "Location" could be configured for the Item Details and this could also be used as a secondary Identifier for Printer Item.</p>  |
| Criticality    | <p>Rates the degree of importance of an Item Type within an organization, which can be adjusted on a per Item basis. The 'Impact' of a Request is initially pulled from the Criticality of the Item, but can be adjusted within the request Information screen if required. Requests logged through the Customer Portal, use the Criticality of the Item to set the Priority of the request.</p> <p>The Incident Analyzer, if enabled by the Administrator in Setup&gt;CMS&gt;Incident Analyzer, can apply the Criticality to automatically detect Problems.</p> <p>The minimum Criticality level can also be used to determine the off-line Items that appear on Outages pages, if the Outages pages are enabled by the Administrator in Setup&gt;Privileges&gt;System.</p> |
| Icon           | <p>When the Type details are saved, the Icon selected for the Item Category will be displayed. To customize the icon for the specific Item Type, select the Icon to access the Upload  or Cancel  options.</p>   |
| Unit Price     | <p>The per-unit price of the Item Type.</p>  |
| Instance Total | <p>Number of instances owned by the organization.</p>  |
| Assigned       | <p>Number of instances assigned to Customers as Items.</p>   |
| Hidden         | <p>Select 'On' to ensure Customers cannot view this Item Type within the list in the Customer Portal. If all Item Types use this selection, the Item Type list will be completely removed from the Portal.</p> <p>Items created using Item Types with Hidden enabled, will not allow Customers to generate requests against them in the Customer Portal, nor will they be able to view or receive updates about requests logged by the User against Items with this functionality enabled.</p>   |

| Item Type             |  |
|-----------------------|--|
| Creation              | Enabling this option gives Customers using the portal the ability to create new Items using this Item Type (if they have been granted the ability to create Items by the Administrator in Setup>Privileges>Customer>Create Item. (This option is not displayed when the Hidden option is enabled.)   |
| Ignore Share          | Enabling this option overrides the system level option for sharing requests raised against Items of this Type. Requests raised against Items of this Type will not appear in the customer portal when viewing shared requests is enabled.  |
| Add Forum Topic       | Create a forum topic using the Item Type Name. This option is only displayed when a new Type is being created.   |
| Incident Default      | The Team of Technicians assigned to support Incidents received related to the Item Type. See: <a href="#">Teams</a>  |
| Problem Default       | The Team of Technicians assigned to support Problems received related to the Item Type. See: <a href="#">Teams</a>   |
| Change Default        | The Team of Technicians assigned to support Change Requests received related to the Item Type. See: <a href="#">Teams</a>  |
| Request Default       | The Team of Technicians assigned to support Service Requests received related to the Item Type. See: <a href="#">Teams</a>   |
| Service Level Default | The default service level for the Item Type. When Billing is enabled, service levels without a cost are listed as an option. The service level with an associated cost can be applied when the Item created, this ensures Item contract payment is processed.  |
| Support Levels        | All Service Level Agreements assigned to the Item Type, which will be displayed as options when a request is created applying Item that uses this Type template. SLAs listed here, are used within the Costs tab of Service Types to forecast break even points on the Service relative to the number of Users.  |
| Find SLA (Name)       | To assign multiple SLAs use this option. Click  to view all SLAs or refine the search by entering a specific name. Select the SLA hyperlink to assign the SLA to the Type Information. Click  to clear the search field. |

6. Enter the Unit Price for the Item Type. This is an optional field that is used for asset management See [Finance Role](#).
7. Set the Customer options

8. Assign the default support Teams
9. Assign one or multiple SLAs, as required
10. Click Save
11. Move to the Classification tab to create problem classification for this Item Type.  
Click on the Item Type name to continue configuration.

## Assigning multiple Companies and Departments to an Item

The .CSV file import facility can also be used to assign more than one Company and Department to an Item, if required. To assign multiple companies within the Company column of the .CSV file, enter the company names separated by a semi-colon (;) If the Company or Companies do not exist in the system, or have been deleted, a new Company will be created.

When importing multiple Departments related to the multiple Companies, the Department related to the Company must be listed in the same order as the Companies and separated by a semi-colon. For example:

Company Field: comp1;comp2

Department Field: dept1:dept2 or ;dept2 or dept1;

Any departments that do not exist in the database or have been deleted, will be created as a result of the .CSV import.

To assign rooms to one of the locations of this multiple Company/Department assignment, the full details of the Company and Department must be entered into the column followed by a semi-colon and the Room number. An example of the Room import format is:

Company Field:CompName1;CompName2

Department Field:Dept1;Dept2

Room Field: CompName1 - Dept1;Room1

## Updating Item Information via .CSV

To easily update multiple Items that already exist within system, information can be imported using a .CSV file. For the update to be successful, the Item number in the .CSV file must match the Item number in the system.

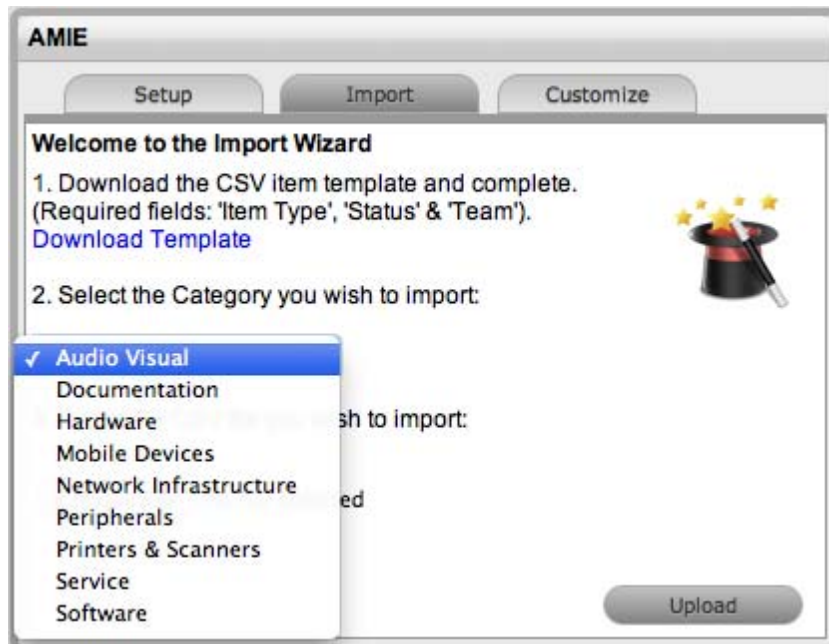
Follow the above *Importing Items* procedure and ensure the Item Number field is mapped correctly. If an Item Number is not included in the .CSV file, a new Item will be created.

### 5.13.5 Downloading an Item .CSV Template

**To download and populate the CSV Template for the CMDB Item Import process:**

1. Select Setup>AMIE
2. Select the Import tab





To view a template that illustrates the fields the application is looking for and the data types (see below), click the Download Template link on the Item Import Wizard screen within Import tab of Item Import in the Setup tab.

The following fields should be visible:

Item Number(Unique char 64),Item Type(char 128),Manufacturer(char 128),Incident Team(char 64),Problem Team(char 64),Change Team(char 64),Request Team(char 64), Company(char 128),Department(char 128),Room(char 64),Username (char 64),Status(char 128),Criticality(char 64)Purchase Date(datetime),Cost(decimal),Field1(char 256),Field2(char 256),Field3(char 256),Field4(char 256),Field5(char 256),Field6(char 256),Field7(char 256),Field8(char 256),Field9(char 256), Field10(char 256),Field11(char 256),Field12(char 256),Field13(char 256),Field14(char 256),Field15(char 256),Field16(char 256),Field17(char 256),Field18(char 256),Field19(char 256),Field20(char 256),Notes(CLOB),Relationship Name(char 256),Parent Item Number(char 64)

The char ### designation in parentheses after each field name signifies what type of data the import utility expects to see in each field. For instance:

- a. Item Type (char 128) means that the first name field cannot exceed 128 characters.
- b. Fields marked as Unique must be unique in the system.
- c. Note the Room details MUST be in the following format: COMPANY-DEPARTMENT;Room

3. To import, select the Item Category

The drop-down list consists of all Categories created by the Supervisor in Configuration>Categories.

4. Enter the file location, or use the Browse button

5. Select Upload

The Field Mapping Wizard appears. Fields that can be mapped to the CSV file are available in the drop-down list.

## Field Mapping Wizard

Select the fields you wish to map to the internal database records.



| General         |                                   |
|-----------------|-----------------------------------|
| Item Number     | [0] Item Number(Unique char 64) ▾ |
| Username        | [11] Username (char 128) ▾        |
| Item Type II    | [1] Item Type(char 128) ▾         |
| Manufacturer I  | [2] Manufacturer(char 64) ▾       |
| Incident Team I | [3] Incident Team(char 64) ▾      |
| Problem Team I  | [4] Problem Team(char 64) ▾       |
| Change Team I   | [5] Change Team(char 64) ▾        |
| Request Team I  | [6] Request Team(char 64) ▾       |
| Criticality     | [13] Criticality(char 64) ▾       |
| Status I        | [12] Status(char 64) ▾            |

| Details         |                         |
|-----------------|-------------------------|
| CPU             | [17] Field1(char 128) ▾ |
| RAM             | [18] Field2(char 128) ▾ |
| MAC Address     | [19] Field3(char 128) ▾ |
| Network Address | [20] Field4(char 128) ▾ |
| Network Name    | [21] Field5(char 128) ▾ |
| Platform        | [22] Field6(char 128) ▾ |

| Relationships      |                                    |
|--------------------|------------------------------------|
| Relationship Name  | [38] Relationship Name(char 256) ▾ |
| Parent Item Number | [39] Parent Item Number(char 64) ▾ |

| General             |                                |
|---------------------|--------------------------------|
| Company I           | [8] Company(char 128) ▾        |
| Department I        | [9] Department(char 128) ▾     |
| Room I              | [10] Room(char 64) ▾           |
| Service Level       | [7] Service Level(char 256) ▾  |
| Date Format         | MM/dd/yy HH:mm                 |
| Contract Start Date | <not selected> ▾               |
| Contract End Date   | <not selected> ▾               |
| Purchase Date       | [14] Purchase Date(datetime) ▾ |
| Cost                | [15] Cost(decimal) ▾           |
| Monthly Cost        | [16] Monthly Cost(decimal) ▾   |
| Notes               | [37] Notes(CLOB) ▾             |

| Details         |                          |
|-----------------|--------------------------|
| OS Version      | [23] Field7(char 128) ▾  |
| Version         | [24] Field8(char 128) ▾  |
| Licenses        | [25] Field9(char 128) ▾  |
| Serial Number   | [26] Field10(char 128) ▾ |
| Platform String | [36] Field20(char 128) ▾ |

Options  Ignore First Line  
 Verbose Errors

**I** Fields that do not contain matching system records automatically create new records.

### 6. Review and map the fields within the .CSV

#### Field Mapping Wizard

##### General

|                 |  |
|-----------------|--|
| Item Number     | Unique Item number of the Configuration Item, this can be generated by the system or defined in the .CSV file. |
| Username        | Customer owning the Configuration Item, imported by entering their user name.                                  |
| Item Type II    | Item Type of the Configuration Item.   |
| Manufacturer I  | Sets the manufacturer details of the Item.   |
| Incident Team I | Incident Team assigned to the Configuration Item.  |

---

**Field Mapping Wizard**

---

|                     |  |
|---------------------|--|
| Problem Team I      | Problem Team assigned to the Configuration Item.   |
| Change Team I       | Change Team assigned to the Configuration Item.  |
| Request Team I      | Request Team assigned to the Configuration Item  |
| Criticality         | Sets the default Criticality (i.e, critical, high, moderate, low, very low) for the Item. Optional.                                |
| Status I            | Default Configuration Item Status.   |
| Company I           | Company owning the Configuration Item.   |
| Department I        | Department owning the Configuration Item.  |
| Room I              | The location of the Item. The .csv file data format to import this information MUST be:<br><br>COMPANY-DEPARTMENT;Room             |
| Service Level       | Configuration Item assigned SLA.   |
| Date Format         | Displays the date format required for the contract details to be imported successfully.  |
| Contract Start Date | Sets the start date of a contract associated with an Item.   |
| Contract End Date   | Sets the end date of a contract associated with an Item.   |
| Purchase Date       | Date the Item was purchased.   |
| Cost                | The cost of the Item.  |
| Monthly Cost        | Sets the monthly Service Cost on per month basis for the Item.   |
| Notes               | Free text to add notes to the Item. Optional.  |
| Details             |  |
| Fields 1 to 20      | Custom fields created for the Category are displayed and can be mapped to the Item based on information included in the .CSV file. |
| Relationships       |  |
| Relationship Name   | Defines the description of the relationship between the Item set in the following field.   |
| Parent Item Number  | Identifies the Item with which an Item is related using the Item Number.   |
| Options             |  |
| Ignore First Line   | Option to ignore first row upon import.  |
| Verbose Errors      | Detailed description of any errors that occur during the import process.   |

---

*I* = Information that needs to exist in the system before the import

*I* = Fields that are mandatory

---

**NOTE:** If relationships are to be created between Items upon import, Parent Items should be imported first. If the system generated Item Number is to be used for the Parent Item, it needs to be included in the Parent Item Number field of the Related Items when they are imported.

---

**Relationships**  Verbose Errors

Relationship Name [38] Relationship Name(char 256) ↓

Parent Item Number [39] Parent Item Number(char 64) ↓

Fields that do not contain matching system records automatically create new records.

Cancel Import

1. Select the Ignore First Line checkbox if the first line of the imported CSV file has field headings. Leave the checkbox clear if the CSV file begins with usable data.
2. Click in Verbose Errors for detailed descriptions of any errors that may occur during the import. Leaving the box unchecked will return abbreviated errors.
3. Select Import to bring into the system the mapped field data. The Item Import screen displays the results of the import.
4. Select Done.

## Configuring Items after the Import

During the Item Import, elements that do not exist in the database are created. These are the fields marked with a blue line within the Field Mapping Wizard:

- ◆ Item Type
- ◆ Warranty
- ◆ Organizational Units.

After an import, all Item Types that have been created will need to be further configured.

To complete Item Type configuration:

1. Log in to the Supervisor Portal
2. Select Configuration>Types
3. In the Item Types screen, click on the newly created Item. The Type Information screen appears.
4. Complete the following fields:
- 5.

---

### Item Type

---



|               |  |
|---------------|--|
| Name          | Name of the Item Type.   |
| Manufacturer  | The manufacturer of the Item Type. New manufacturers can be created and existing manufacturers can be edited and deleted by using the Edit and New buttons that appear beside the drop-down menu of manufacturers. |
| Item Category | This signifies the type of Item. (Hardware, Software or Service are the default Types, but Users with the Supervisor Role can create more if required).  |

---



---

**Item Type**

---

|                |  |
|----------------|--|
| Identifier     | <p>The drop-down list that appears is drawn from the fields defined for the Item Category selected. Although this information is not required, the Identifier is used to differentiate similar Items that may be in use throughout an organization. For example, if an organization uses the same printers for all departments, an Item Category field of "Location" could be configured for the Item Details and this could also be used as a secondary Identifier for Printer Item.</p>  |
| Criticality    | <p>Rates the degree of importance of an Item Type within an organization, which can be adjusted on a per Item basis. The 'Impact' of a Request is initially pulled from the Criticality of the Item, but can be adjusted within the request Information screen if required. Requests logged through the Customer Portal, use the Criticality of the Item to set the Priority of the request.</p> <p>The Incident Analyzer, if enabled by the Administrator in Setup&gt;CMS&gt;Incident Analyzer, can apply the Criticality to automatically detect Problems.</p> <p>The minimum Criticality level can also be used to determine the off-line Items that appear on Outages pages, if the Outages pages are enabled by the Administrator in Setup&gt;Privileges&gt;System.</p> |
| Icon           | <p>When the Type details are saved, the Icon selected for the Item Category will be displayed. To customize the icon for the specific Item Type, select the Icon to access the Upload  or Cancel  options.</p>   |
| Unit Price     | <p>The per-unit price of the Item Type.</p>  |
| Instance Total | <p>Number of instances owned by the organization.</p>  |
| Assigned       | <p>Number of instances assigned to Customers as Items.</p>   |
| Hidden         | <p>Select 'On' to ensure Customers cannot view this Item Type within the list in the Customer Portal. If all Item Types use this selection, the Item Type list will be completely removed from the Portal.</p> <p>Items created using Item Types with Hidden enabled, will not allow Customers to generate requests against them in the Customer Portal, nor will they be able to view or receive updates about requests logged by the User against Items with this functionality enabled.</p>   |

---

| Item Type             |  |
|-----------------------|--|
| Creation              | Enabling this option gives Customers using the portal the ability to create new Items using this Item Type (if they have been granted the ability to create Items by the Administrator in Setup>Privileges>Customer>Create Item. (This option is not displayed when the Hidden option is enabled.)   |
| Ignore Share          | Enabling this option overrides the system level option for sharing requests raised against Items of this Type. Requests raised against Items of this Type will not appear in the customer portal when viewing shared requests is enabled.  |
| Add Forum Topic       | Create a forum topic using the Item Type Name. This option is only displayed when a new Type is being created.   |
| Incident Default      | The Team of Technicians assigned to support Incidents received related to the Item Type. See: <a href="#">Teams</a>  |
| Problem Default       | The Team of Technicians assigned to support Problems received related to the Item Type. See: <a href="#">Teams</a>   |
| Change Default        | The Team of Technicians assigned to support Change Requests received related to the Item Type. See: <a href="#">Teams</a>  |
| Request Default       | The Team of Technicians assigned to support Service Requests received related to the Item Type. See: <a href="#">Teams</a>   |
| Service Level Default | The default service level for the Item Type. When Billing is enabled, service levels without a cost are listed as an option. The service level with an associated cost can be applied when the Item created, this ensures Item contract payment is processed.  |
| Support Levels        | All Service Level Agreements assigned to the Item Type, which will be displayed as options when a request is created applying Item that uses this Type template. SLAs listed here, are used within the Costs tab of Service Types to forecast break even points on the Service relative to the number of Users.  |
| Find SLA (Name)       | To assign multiple SLAs use this option. Click  to view all SLAs or refine the search by entering a specific name. Select the SLA hyperlink to assign the SLA to the Type Information. Click  to clear the search field. |

6. Enter the Unit Price for the Item Type. This is an optional field that is used for asset management See [Finance Role](#).
7. Set the Customer options

8. Assign the default support Teams
9. Assign one or multiple SLAs, as required
10. Click Save
11. Move to the Classification tab to create problem classification for this Item Type.  
Click on the Item Type name to continue configuration.

## Assigning multiple Companies and Departments to an Item

The .CSV file import facility can also be used to assign more than one Company and Department to an Item, if required. To assign multiple companies within the Company column of the .CSV file, enter the company names separated by a semi-colon (;) If the Company or Companies do not exist in the system, or have been deleted, a new Company will be created.

When importing multiple Departments related to the multiple Companies, the Department related to the Company must be listed in the same order as the Companies and separated by a semi-colon. For example:

Company Field: comp1;comp2

Department Field: dept1:dept2 or ;dept2 or dept1;

Any departments that do not exist in the database or have been deleted, will be created as a result of the .CSV import.

To assign rooms to one of the locations of this multiple Company/Department assignment, the full details of the Company and Department must be entered into the column followed by a semi-colon and the Room number. An example of the Room import format is:

Company Field:CompName1;CompName2

Department Field:Dept1;Dept2

Room Field: CompName1 - Dept1;Room1

## Updating Item Information via .CSV

To easily update multiple Items that already exist within system, information can be imported using a .CSV file. For the update to be successful, the Item number in the .CSV file must match the Item number in the system.

Follow the above *Importing Items* procedure and ensure the Item Number field is mapped correctly. If an Item Number is not included in the .CSV file, a new Item will be created.

## 5.13.6 Financial Management

Financial Management quantifies, in financial terms, the value of IT services for the business and IT department. This includes measuring the value of the underpinning infrastructure that provides the services and qualifying operational forecasts. Applying a services approach to IT, financial management helps identify, document and agree on the value of services being provisioned by IT, and provides service demand modeling and management.

With a goal to ensure funding for the delivery and consumption of services, Financial Management focuses on the demand and supply requirements based on business strategy, capacity inputs and forecasting use. As a transitional role between an organization's corporate finances and service management, Financial Management calculates and assigns a monetary value to a Service and service components to allow costs to be spread across the organization.

The monetary value is derived by calculating the operating and capital costs, which include the investments made in hardware and software license costs, annual maintenance fees for hardware and software and personnel resources used to support and maintain the services, across the number of Users.

Tightly integrated throughout the application, Financial Management derives hierarchical costs from within the CMDB and considers Org Units as Cost Centers, while extending functionality built into the Service Item costs calculator. Used as a forecasting tool, it provides the service organization with information about pricing a service, by detailing the contributing cost factors and applying concepts such as cost splitting across services that leverage common infrastructure. Stored in the CMDB, the central repository, organizations can generate their own reports and all data is broken down by cost center, ready to be reassembled in real time for the User interface to assist with business planning and the budgeting processes.

Financial Management is not a standalone process in this service management application, but a component of [Service Portfolio Management](#) and the [Service Catalog](#), with direct access being found within the [Service Item Costs tab](#) of any Service Category Item.

To access this functionality, Users must be assigned the Finance Role, in the Information tab of their User information screen. For detailed information about using Financial Management, refer to [Financial Management Applied](#).

## 5.13.7 Service Portfolio Management

The Service Portfolio details the commitments and investments made by a Service Provider to its customers and within the markets they service. It contains current contractual obligations, services under development and continuing service improvement programs.

The Portfolio represents all engaged resources and resources being released during the different phases of the Service Lifecycle. It includes the Service Pipeline that consists of services under development and the Service Catalog, which includes customer visible active services that have the potential to recover costs or earn profits for the Services provided.

Service Portfolio Management is a dynamic and ongoing process that covers the following stages in work practices:

- ♦ Define - list services, confirm business cases and verify portfolio data
- ♦ Analyze - maximize portfolio value, set priorities
- ♦ Approve - finalize portfolio proposal, authorize services and resources
- ♦ Charter - communicate decision and allocate resources.



The service management system includes ITIL certified Service Portfolio Management, with Service Pipeline and [Service Catalog](#) functionality, as part of the base product. Combining the Service Item Lifecycle stored in the embedded CMDB, with assigned Service Level Agreements and service Teams, the system enables organizations to manage their Service Offerings from strategy to design through to transition, operation and retirement.

Service Portfolio Management in the system allows organizations to create Service Categories that include business-related attributes, such as business processes supported, business owners and business users. This ensures organizations record all relevant information against the Service.

Organizations can further optimize their Service Portfolio Management by tracking and reporting on Service Offering and Service Component usage, Service Level performance and costs. This includes the functionality to calculate break-even points (B.E.P.) for offering a service, which allows support organizations to charge the appropriate cost for offering the service to their internal or external customers. This is achieved by recording of financial attributes against services, including service cost, service charges and service revenue.

The service management system SPM capability also allows organizations to easily record the technical aspects of services such as applications used, IT Owners, supporting services, dependent services, SLAs and OLAs, Contracts and Agreements by defining Relationship Maps.

## Working with SPM

Using the SPM functionality, organizations can create and publish all Service Offerings throughout the Service Lifecycle, which include the phases of:

1. Services under development, that are being considered but are not yet released (Service Pipeline)
2. Services in production/operation, that would be included in the Service Catalog
3. Retired/discontinued Service Offerings.

Service Items are recorded against the different stages of the Lifecycle and easily accessed through the filter views, available within the Configuration>Items screen:

| Filter            | Relationship  |
|-------------------|---|
| All Items         | All Items stored within the CMDB, regardless of the assigned Lifecycle State.   |
| Hardware Catalog  | All Items that use the Hardware Category Template stored within the CMDB, regardless of the assigned Lifecycle State.       |
| Service Catalog   | All Items that use the Service Category Template stored within the CMDB that are in an active Lifecycle State.              |
| Service Pipeline  | All Items that use the Service Category Template stored within the CMDB that are assigned a Pre-production Lifecycle State. |
| Service Portfolio | All Items that use the Service Category Template stored within the CMDB, regardless of the assigned Lifecycle State.        |
| Software Catalog  | All Items that use the Software Category Template stored within the CMDB, regardless of the assigned Lifecycle State.       |

Consistent with the Lifecycle model used for all Configuration Items (CIs) throughout the application, Service CIs are created using the Service Category template, with a series of Lifecycle States customized to represent the different phases a CI can transition through (i.e., inception, design, implementation, operation or retirement phases).

Within each State of the Service Lifecycle, the relevant Users included in the Service Portfolio Team can be assigned, allowing them to manage Service Item information when the Item is allocated the State.

## Using the SPM Functionality

The following outlines how the SPM Team define, analyze, authorize and charter a Service Offering in the system. This is achieved as a Supervisor User with Configuration and Service Level Management privileges enabled.

To begin:

1. Create the Service Portfolio Team in the Service > Teams tab, and assign all the relevant Users  
Then within the Group tab, create the work and management groups associated with the Service Lifecycle and assign the relevant Users. (See: [SPM Teams](#).)
2. Within the Configuration>Categories Tab, edit the existing Service Category  
Duplicate and edit an existing Service Category or click New, to create a new Service Category. (See: [Categories](#).)
3. In Edit mode, click the Service Category option and assign the Service Portfolio Team  
Set field labels for the Item, including any relevant business related attributes. Save and move to the Lifecycle tab.
4. Edit the default Lifecycle, to include all the applicable States defined by the SPM Team  
Some example States include requirements, defined, analyzed, approved, chartered, designed, developed, built, test, released, operational, retired. (See: [Categories Lifecycle](#).)
5. Within each stage of the Lifecycle define the following State options:
- 6.

|                      | Description  |
|----------------------|--|
| Status               |  |
| Name                 | Enter the name of the Lifecycle State.   |
| Active State         | Stipulates if the Item is Active, when assigned this State.  |
| Offline State        | Only visible when Active is set to No. Indicates if the Item is offline and inactive. Items moved into states where this is enabled, have availability metrics calculated. |
| Pre-production State | Only visible for Service Category lifecycle states. Items that use this state are available within the Service Pipeline filter view of the Configuration>Items tab.        |

|                    | Description   |
|--------------------|---|
| Entry Point        | <p>An Entry Point is used to indicate the start of a Lifecycle. To make the state a Workflow Entry Point, select the Entry Point checkbox.</p> <p>As the Entry Point is the first state, the Previous States field will be removed.</p> |
| Exit Point         | Select whether the state will be an Exit Point. An Exit Point is used to indicate the end of a Lifecycle.   |
| Service Team Group | Assign a Group within the associated Service Portfolio Team, to allow these Users to edit the Item details when it is assigned this stage of the Category Lifecycle.  |

- Continue to configure the Category like any other Category and Save
- Within the Configuration > Types tab, create an Item Type using the Service Category (See: [Item Types](#).)
- Assign one or more SLAs

Multiple SLAs can be associated with the Type template as it allows the User to calculate the service costs for all Items that apply the Type template but that may need to be associated with different SLAs.

- Move to the Costs tab and complete known details

Within the Costs tab, organizations can calculate the Break-Even Point (BEP) of a Service based on forecasting the number of Customers of that Service. This enables the organization to account for the per calendar month price of the Service, which is used to calculate the ongoing revenue figures within the Item Costs tab that uses the Service Type template.

| Type Information |             |               |                |          |               |  |
|------------------|-------------|---------------|----------------|----------|---------------|--|
| Forecast Costs   |             | Actual Costs  |                |          |               |  |
| Capital          | 12000       | Capital       | \$0.00         |          |               |  |
| Recovery         | 5 years     | Recurring     | 0.0 p.c.m      |          |               |  |
| Recurring        | 400 p.c.m   |               |                |          |               |  |
| Services         |             |               |                |          |               |  |
| SLA              | Cost (p.a.) | Current Users | Forecast Users | B.E.P.   | Price (p.c.m) |  |
| Gold             | \$2,000.00  | 17            | 100            | \$172.67 | 173           |  |

- 

### Forecast Costs

|           |   |
|-----------|---|
| Capital   | Enter the proposed total cost to be invested in the Service.  |
| Recovery  | Complete the field with the expected number of years designated to recover the costs of implementing the Service. |
| Recurring | Enter the proposed ongoing cost, on a per calendar month basis, for offering the Service.                         |

---

**Forecast Costs**

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|              |  |
|--------------|--|
| Services     | Using the details entered in the Costs fields and the cost per annum of the SLA, enter the forecast number of Customers/Users to calculate the break even point (B.E.P) of the Service. Using the auto-calculated B.E.P., enter a per calendar month Price for the Service to recover costs. This figure is used in the <a href="#">Service Item Costs tab</a> to calculate the ongoing Revenue figures. |
| Actual Costs |  |
| Capital      | Content for this field is derived from the Cost field within then Costs tab of the Item created using this Type.   |
| Recurring    | Content for this field is derived from the Monthly Cost field within the Costs tab of the Item created using this Type.  |

---

12. [Create the Item](#) and assign the relevant State, which in turn associates the relevant Users included in the SPM Team.

Assign the Users and/or Org Units to set the number of affected Users, and set the appropriate SLA.

The Costs tab of a Service Item includes information related to the financial and contractual details associated with the Item. The information more specifically related to the Service Item is recorded in the Charges and Revenue fields, as this information allows service and support organizations to calculate the costs of offering a service and if appropriate, recover the costs from the customers.

- 13.

---

**Charges**

---

|                  |   |
|------------------|---|
| Price (per user) | Draws the figure from the <a href="#">Service Item Type Costs tab</a> and displays this as a daily amount. This figure is then multiplied with the number of Users/ Customers assigned to the Item, to calculate the Revenue costs. |
| Cost (per user)  | Draws the figure from the Inherited Costs and displays this as a daily amount. This figure is then multiplied with the number of Users/Customers assigned to the Item, to calculate the actual Costs.                               |
| Revenue          |   |
| Month to Date    | Uses the Charges figure, multiplied with the number or Users and days of month passed, to calculate the month to date figure.   |
| Previous Month   | A reference figure for an average monthly cost, based on the previous months revenue for the Service Item.  |
| Availability     |   |
| Avg Repair Time  | Entries displayed here are automatically calculated based on the average length of time an Item is offline.   |

---

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## Charges

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Avg Time To Fail

Figures displayed here are automatically calculated based on the average time between an Item being moved to an offline State.

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## 5.13.8 Financial Management Applied

Financial Management can be used to forecast the costs for offering a Service and can also calculate the amount that should be charged to the Service Users in order to recover costs.

To use Financial Management as a tool for calculating the financial value of the underpinning infrastructure that provisions services and to qualify operational forecasts, you need to:

- ♦ Provide the User access to the functionality
- ♦ Enable SLA costing functionality
- ♦ Enable the functionality within the Category
- ♦ Create the Item Type and enter forecast figures
- ♦ Create the Service Item, which automatically applies the forecast figures
- ♦ Build the relationships between the Service and underpinning hardware and software, to associate actual costs
- ♦ Use Finance Reports to compare forecast costs with actual costs, and chargeback costs to the Org. Unit Users.

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**NOTE:** To complete the following outlined process, a User must have Supervisor and Administrator access.

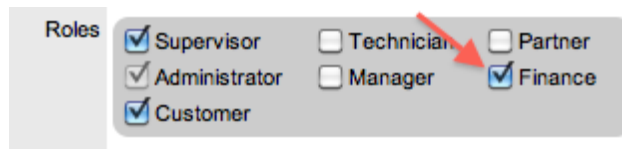
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### Enable Financial Management Access

To access the Financial Management functionality a User must be assigned the Finance Role within the Information tab of their User Information screen. Assigning the Role within a system synchronized with an authentication server, the system administrator needs to include the User in the Finance group in LDAP.

To switch on the functionality for an existing User in a system not synched with an LDAP server, as a Supervisor:

1. Select the User > Users tab
2. Click on the Name hyperlink of the relevant User
3. Select Edit
4. Tick the Finance box in the Roles field



5. Click Save.

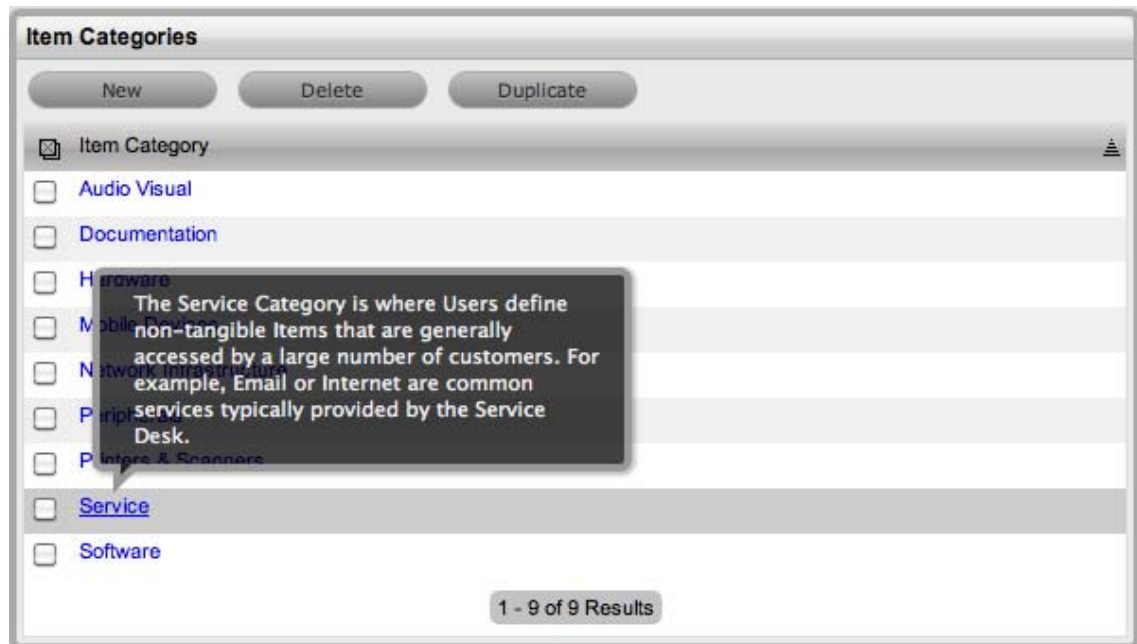
The User can now access the Finance Management functionality within the consolidated User view.

## Enable Functionality

Financial information can only be calculated for Service Items that are created using a Category, which has the Service Category option enabled. By enabling this option, the Costs Tab is made available with the Item Type where baseline figures can be recorded.

As a User with the Finance Role:

1. Move to the Configuration > Categories tab
2. Click the Service Item Category hyperlink



3. Verify the Service Category option is checked



4. Click Done.

## Charging for Service

If the service and support organization is to charge Organizational Units, that is companies or departments, for the ongoing service they provide the costing functionality for the Service Level Agreements (SLAs) needs to be enabled, and the Prices for the different Agreements need to be assigned to each of the SLAs.

As a User with Administrator access, within the Setup screen:

1. Select Setup > Billing
2. Click Yes for the Display SLA Prices option



The screenshot shows a 'Billing' window with a 'Setup' tab. Under the 'Billing Module' section, there are four options, each with 'Yes' and 'No' radio buttons: 'Enable Purchase Orders', 'Enable Contracts', 'Enable Invoices', and 'Display SLA Prices'. A red arrow points to the 'Yes' button for 'Display SLA Prices'. Below this is the 'Global Settings' section with a 'Currency' dropdown menu set to 'United States Dollar'. A 'Save' button is located at the bottom right of the window.

3. Click Save  
The Annual, Request and Hourly Price fields are now made available within an SLA Editor screen.
4. Switch to the User Portal to access the Supervisor view
5. Move to the Service > SLAs tab
6. Select the Name hyperlink for an SLA  
The SLA Editor is now displayed.
7. Click Edit
8. Enter the relevant figure in the Annual Price field  
The Annual Price entered should be the per User, per year price for the SLA.

The screenshot shows the 'SLA Editor' interface with the following configuration:

- Details:** Name: Bronze; On Breach:  cc Team Leader; Pause on Holiday: ; Customer Timezone: ; Timezone: (GMT +10:00) Melbourne, Syd
- Requirements:** Availability: 97.00 % Uptime
- Internal Costs:** Annual Cost: 150.00; Request Cost: 0.00; Hourly Cost: 0.00
- Customer Prices:** Annual Price: 160.00; Request Price: 0.00; Hourly Price: 0.00

9. Click Save and Done.

Repeat the process for all relevant SLAs configured in the system. For detailed information about configuring SLAs see [Creating SLAs](#).

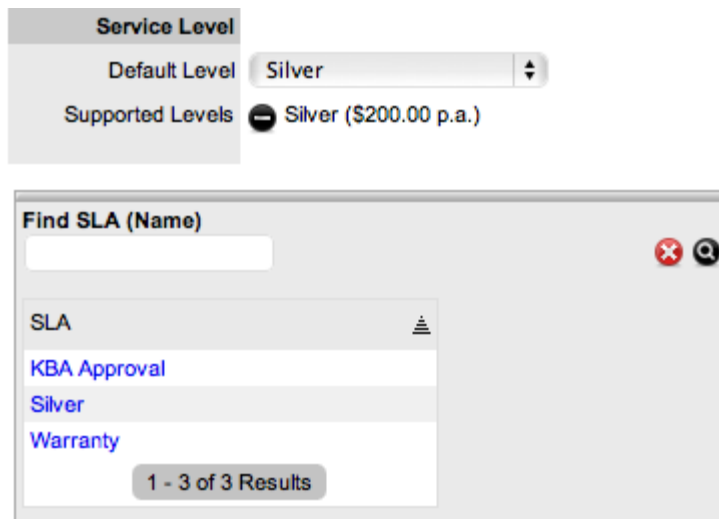
## Forecast Service Costs

When proposing a Service as part of Service Portfolio Management, the investment and ongoing costs for offering a Service can be calculated. This information can then be used to project potential revenue for offering the Service and allow consumers of the Service to be charged for accessing the Service based on User access. For an example, we will use the Service Desk Service, considering the investment in hardware and software plus the ongoing SLA expense for offering the Service, when forecasting costs.

To forecast the cost of offering a Service, as a Financial User:

1. Move to the Configuration > Types tab
2. Select the default Service Desk Item Type  
If creating a new Item Type refer to [Creating Item Types](#).
3. Click Edit
4. Search and select the relevant SLAs for the Supported Levels field  
This is where SLAs that have Prices are associated with them.





5. Move to the Costs Tab

The Capital, Recovery and Recurring cost fields are now displayed.

6. Complete the following fields:

7.

---

**Costs**

|              |   |
|--------------|---|
| Capital      | Enter the sum total to be invested in hardware and software infrastructure that will underpin the Service.  |
| Recovery     | Complete the field with the number of years designated to recover the costs of implementing the Service.  |
| Recurring    | Enter the ongoing cost, on a per calendar month basis, for offering the Service. For example, annual support and maintenance agreement costs charged on a monthly basis.  |
| Services     | Using the details entered in the Costs fields and the cost per annum of the SLA, enter the forecast number of Customers/Users to calculate the break even point (B.E.P) of the Service. Using the auto-calculated B.E.P., enter a per calendar month Price for the Service to recover costs. This figure is used in the <a href="#">Service Item Costs tab</a> to calculate the ongoing Revenue figures.<br><br><b>NOTE:</b> If an SLA with an Internal Cost is assigned to the Type, the B.E.P will be the SLA cost divided by 12 plus the cost of recovering the Capital expenditure over the number of years defined for the Capital to be recovered. For example, where the SLA cost is \$240 for the year, the B.E.P will never be less than \$20 per month. |
| Actual Costs |   |
| Capital      | Content for this field is derived from the Cost field within the Costs tab of the Item created using this Type.   |
| Recurring    | Content for this field is derived from the Monthly Cost field within the Costs tab of the Item created using this Type.   |

---

8. Enter a figure in the Forecast Users field for each SLA  
 (The displayed SLAs are based on the ones assigned to the Supported Levels field in the Information tab.)

If multiple SLAs are assigned to the Item Type and Forecast Users are assigned to each SLA, the Costs are divided by the total number of Forecast Users as calculated across the SLAs to arrive at the B.E.P. The system does not differentiate between who the Users are, it only accounts for the number of Users

9. Enter the Price for the Service to recover costs in a per calendar month

Use the calculated Break Even Point (B.E.P.) to set the Price. This figure is then used as a comparison figure for the Actual cost in the Service Item Costs Tab.

| SLA    | Cost (p.a.) | Current Users | Forecast Users | B.E.P.  | Price (p.c.m) |
|--------|-------------|---------------|----------------|---------|---------------|
| Bronze | \$300.00    | 1             | 70             | \$30.50 | 32.00         |
| Gold   | \$400.00    | 1             | 10             | \$38.83 | 40.00         |
| Silver | \$350.00    | 1             | 20             | \$34.67 | 36.00         |

10. Click Save and Done.

The forecasted Price per User is now available within the Charges Price field on the Costs tab of the Service Item.

**Forecast price per month per User for providing the Service. Estimation is based on 100 Users and the supported SLA**

**Actual cost per month per User based on 19 assigned Users and costs delegated from related Items.**

## Calculate Actual Service Costs

To calculate the actual Service Costs, the relationships of the infrastructure Items that underpin the Service need to be mapped within the Relationships tab. Working with these relationships, it should be noted that the Service is considered a Child Item within the hierarchy.

To build the relationship map refer to the [Relationships Tab](#).

After the underpinning infrastructure and its associated costs are related to the Service Item, the following financial information is available in the Service Item Costs tab:

| Financial         | Description   |
|-------------------|---|
| Cost              | The financial investment made to purchase the Item. This figure is also used when the Delegate Costs is enabled for allocating costs across related Items.<br><br><b>NOTE:</b> Typically for Service Items, the infrastructure costs would be zero as this would be derived from the associated Parent Items. |
| Monthly Cost      | The amount invested on a monthly basis to maintain the running of an Item. This figure is also used when the Delegate Costs option is enabled for allocating costs across related Items.  |
| Usage Unit Cost   | This is used as a reference field, where the User can enter base unit cost, for example per Megabyte data charge, which can be used for calculating costs in custom reports.  |
| Purchase Date     | The date the Item was purchased.  |
| Depreciate Over   | Enter the number of years the Item is to be depreciated over, if required.  |
| Depreciated Value | The system calculates the current value of the Item based on the Purchase Date and the number of years the Item is to be Depreciated Over.  |
| Audit Date        | Set the date the Item is next to be audited.  |
| PO Number         | If Purchase Orders are enabled for the system, the field is visible and automatically populated with the PO number generated by a User within the Finance>Purchase Orders tab, when the Item order was recorded in the system.  |
| Charges           |   |
| Price (per user)  | Draws the figure from the <a href="#">Service Item Type Costs tab</a> and displays this as a daily amount. This figure is then multiplied with the number of Users/Customers assigned to the Item, to calculate the forecasted Revenue.   |
| Cost (per user)   | Draws the figure from the Inherited Costs and displays this as a daily amount. This figure is then multiplied with the number of Users/Customers assigned to the Item, to calculate the actual Costs.   |
| Revenue           |   |

| Financial         | Description  |
|-------------------|--|
| Month to Date     | Uses the Charges Price figure, multiplied by the number of Users and days of month passed, to calculate the month to date figure.  |
| Previous Month    | A reference figure for an average monthly revenue figure, based on the previous month's revenue for the Service Item.  |
| Costs             |  |
| Month to Date     | Uses the Charges Cost figure, multiplied by the number of Users and days of month passed, to calculate the month to date Cost.   |
| Previous Month    | A reference figure for an average monthly cost, based on the previous month's cost for the Service Item.   |
| Inherited Costs   |  |
| Inherited Capital | Total infrastructure costs of parent CI's that directly contribute to the cost of the Service Item. This figure is derived from all the Cost fields within the Item Information>Costs tab of related Parent Items.   |
| Inherited Ongoing | Running costs of all associated Items that enable the Service Item to continue to function. This figure is derived from all the Monthly Cost fields within the Item Information>Costs tab of related Parent Items.   |
| Delegate Costs    | <p>To enable cost delegation across the relationship map allowing associated Items to inherit the costs of the current CI, select Yes. This will take the figures from the Cost and Monthly Cost fields for the Item and spread them across related Child Items.</p> <p>Define the technique to be used to evaluate the cost split:</p> <p><i>Child Count:</i> Costs are split by percentage based on the number of child CI's the costs are being delegated across.</p> <p><i>User Count:</i> Costs are split proportionally based on the number of users of the child CI's the costs are being delegated across.</p> <p><i>Custom %:</i> Allows for the % cost to be assigned within the relationship. To do this, within the Service Item Relationships tab, all Items within the defined relationship map must have the same setting and then the Cost Split % can be set within the table included on the Relationships tab by clicking on the 0.00 link. Note, if a N/A link is visible within the Cost Split % column, then that Item does not have the Custom % option selected.</p> |
| Availability      |  |
| Avg Repair Time   | Entries displayed here are automatically calculated based on the average length of time an Item is offline.  |

**Financial**

**Description**

Avg Time To Fail

Figures displayed here are automatically calculated based on the average time between an Item being moved to an offline State.

**Inherited Costs**

Charging Organizational Units appropriately for a Service can be based on figures derived from the Items associated with the Service. For example, the Service Desk is hosted on a server and uses service management software. The costs associated with the server and software are combined to make the Inherited Capital cost, while any ongoing support contracts would be assigned as an Inherited Ongoing cost on a per month basis.

**Item Information**

Information Details Costs Requests Relationships Outages

New Delete Print Item # 100004 (Oracle 11g)

Service Desk

Oracle 11g

Service Manager

Available

Item # 100002  
Criticality: Low  
Average Uptime: N/A  
Average Response Time: N/A  
Service Level: Bronze  
Last Updated: 05/21/12 12:12

is a parent of  
100005 (Service Manager)

Loaded

Direction: Parent - Child

| Current Item | Relationship | Related Item    | Item # | Category | Cost Split % |
|--------------|--------------|-----------------|--------|----------|--------------|
| Oracle 11g   | is host of   | Service Manager | 100005 | Software | N/A          |

To derive the amounts from the related infrastructure and populate the fields within the Child Item, the Delegate Costs field must be enabled within the Inherited Costs for the Parent Items and the technique for deriving the cost must be assigned to the CI.

In the Service Desk example, for the server hosting the Service Desk Service it would be appropriate to delegate costs applying the Child Count technique as multiple software/service CIs may be associated with the server. While, the User Count would be used to delegate costs to the service management software.

After the relationships have been defined for the Service and the Inherited Costs applied, the Finance User can verify the forecast numbers by comparing the Inherited Costs within the Item>Costs tab, to the Capital and Recurring Costs recorded in the Item Types Costs tab. Any disparity between the figures should alert the Finance User as to whether the Service is within budget and if relevant, making or costing money.

## Finance Reports

The Finance User can access the following Reports within the Reports>Finance tab, to assist with verifying the cost and revenue generated by a Service, and monitoring how a Service is used.

| <b>Finance Reports</b> | <b>Description</b>   |
|------------------------|--|
| Service Cost           | <p>The cost of providing a Service is calculated nightly and saved, along with the revenue figures, in the ITEM_REVENUE table.</p> <p>The cost of the Service includes all the cost factors and saves a figure each night, per service, per cost centre. This is the sum of these for a Service.</p>     |
| Service Revenue        | <p>The price charged for providing a Service is calculated nightly and saved, along with the cost figures in the ITEM_REVENUE table.</p> <p>The price charge for the Service is determined in the cost calculator configured in the Service Item Type.</p>   |
| Total Service Cost     | <p>The cost of providing a Service is calculated nightly and saved, along with the revenue figures, in the ITEM_REVENUE table.</p> <p>The cost of a Service includes all the cost factors and saves a figure each night, per service, per cost centre. This is the sum of these across all Services.</p> |
| Total Service Revenue  | <p>The price charged for providing all Services is calculated nightly and saved, along with the cost figures in the ITEM_REVENUE table.</p> <p>The price charge for the Service is determined in the cost calculator configured in the Service Item Types associated with all Services.</p>              |
| Service Consumption    | <p>Uses the total number of consumers of a service as recorded in the ITEM_REVENUE table, which is broken down by cost centre,</p> <p>to illustrate how the number of consumers of a service varies over time.</p>   |

## 5.13.9 ZENWorks

Within the ZENWorks tab the Service Desk can be configured to work seamlessly with the Configuration Management tool. In the first instance this is achieved by using ZENWorks as the OpenID Provider for authenticating Service Desk Users and Customers. On a day to day basis, the ability to use the Remote Control and Bundle Management capability for the Configuration tool within a request, increases the efficiency of Service Desk Users when managing their workload.

### Enabling OpenID for Authentication

To enable authentication of Service Desk Users through ZENWorks the OpenID Consumer option within Setup>Privileges>System must first be enabled.

The screenshot shows the 'Privileges' configuration window with the 'System' tab selected. Under the 'General Settings' section, the following options are visible:

- Host Address: [Text Input Field]
- Edit Item Numbers: Yes (selected) / No
- Public Knowledge Base: Yes (selected) / No
- Public Surveys: Yes (selected) / No
- Public Alerts: Yes (selected) / No
- Passwords: Random / Email (selected) / Manual
- Password Questions: Yes (selected) / No
- Session Timeout: 30 (minutes) [Dropdown]
- Terminate Active Session: Yes (selected) / No
- Default Name Pattern: [First name] [Last nam] [Dropdown]
- Outbound Web Services: On / Off (selected)
- OpenID Provider: On / Off (selected)
- OpenID Consumer: On / Off (selected) - A red arrow points to this option.

Once enabled, the ZENWorks location details and OpenID information is to be configured within the AMIE>ZENWorks tab.

## Defining Settings

To define the ZENWorks server information and OpenID Provider details, as an Administrator:

1. Select Setup > AMIE >ZENWorks tab



2. Complete all the following fields:
3. \_\_\_\_\_

---

### AMIE

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#### General Settings

**Server Address** Complete the server details hosting the ZENWorks instance.

**IP Field** By default within the AMIE mapping file, Field 4 within the Details Tab of an Item will be used for the IP address (Network Address) of a device. This can be edited, if required.

**OS Field** By default within the AMIE mapping file, Field 20 within the the Details Tab of an Item will be used to record the OS information of a device. This can be edited if required.

#### OpenID Provider

**Name** Enter ZENWorks as the OpenID Provider name.

**Icon** By default the ZENWorks icon that is to be available on the Service Desk log in page for Customers and Users accessing the Service Desk by the relevant Portals.

**URL** The OpenID Provider URL is automatically generated based on the Server Address details when the Save button is selected..

---

4. Click Save.

## Reset Button

Select the Reset button for the system to generate a new certificate that allows the service desk to communicate with Zenworks. When selected, the system will display an information message providing the location details for downloading the new certificate.

To complete the ZENWorks integration:

- ◆ Import Customer and User details from the eDirectory [authentication server](#)
- ◆ Import Items using the [AMIE](#) and the ZENWorks 11.

When validating account details of Users and Customers accessing the Service Desk, the system will query two locations for unique identifiers:

- ◆ details in the GUID field imported from eDirectory for the Customer or User
- ◆ the Customer's or User's email address.

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# 6 CMS

## 6.1 Configuration Management System (CMS)



Within the ITIL framework the Configuration Management System (CMS) includes the Knowledge Management Database (KMDB) and the Configuration Management Database (CMDB). Within the LiveTime CMS tab, the Administrator can define elements that are used within the CMDB, such as the terminology used to describe Item relationships and durations of warranties used by Service Contracts.

It also allows the Administrator to define parameters within Incident Management to implement proactive Problem Management.

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**NOTE:** The CMS tab applies to Service Manager only.

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## 6.2 Relationships

Relationships can be defined between Configuration Items of the CMDB to create a Service Catalog. The Catalog allows Users to assess the impact of a request on the organization. To build a Catalog, the Relationships are defined within the properties of a Configuration Item within Configuration Management.

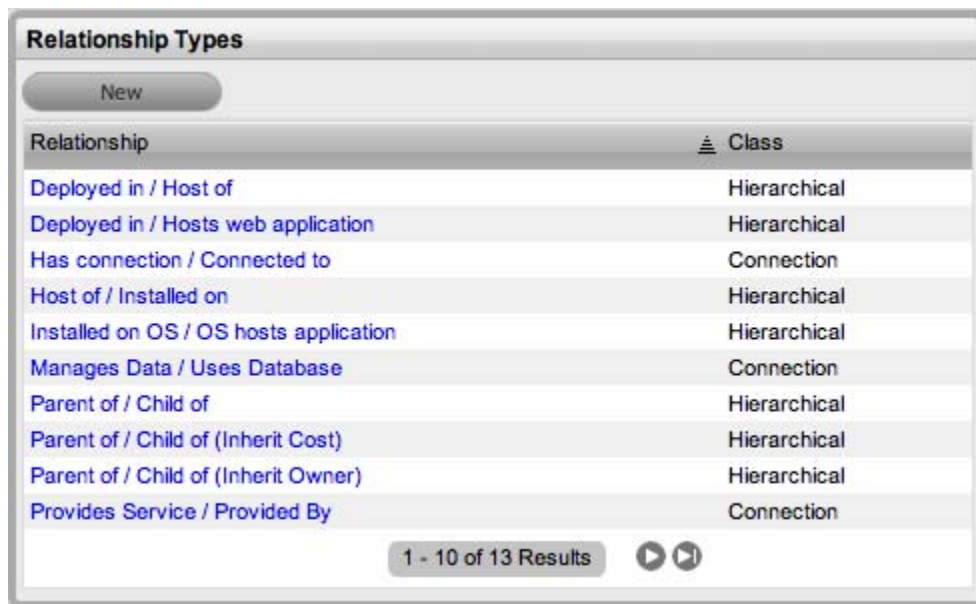
To assist with the building of a CMDB, the Administrator refines the list of Relationship Types available for the Supervisor.

### 6.2.1 Edit or Create Relationship Types

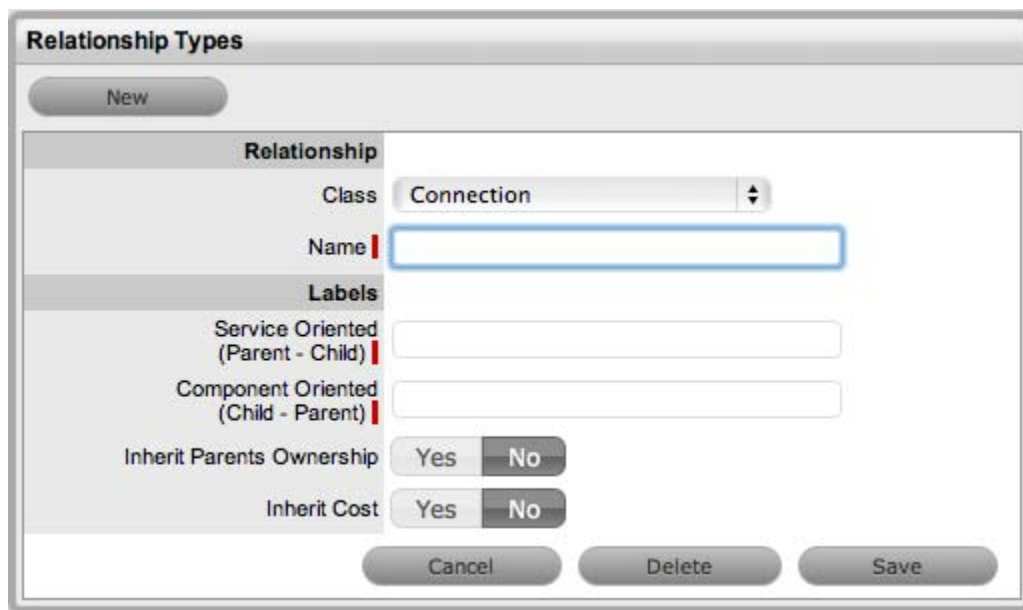
To edit or create a Relationship Type:

1. Select CMS>Relationships

The Relationship Types screen appears.



- To edit, click on the Relationship, or, to create a Relationship click New



- Select the Relationship Class
- Enter a Name for the relationship
- Define the Service Oriented and Component Oriented labels
- 

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### Relationship Types

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Relationship

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## Relationship Types

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|                                      |  |
|--------------------------------------|--|
| Class                                | Select either a Hierarchical or Connection Class.<br><br><i>Hierarchical</i> describes ownership, such as a Parent/Child relationship, for example, an operating system hosting an application.<br><br><i>Connection</i> defines a connection association. For example, an application accessing a database. |
| Name                                 | Enter a Name that reflects the nature of the relationship for both Component or Service views. For example, component view Name = Deployed in/ Host of.  |
| Labels                               | Each Relationship between Items can be described from a Service Oriented or Component Oriented view.   |
| Service Oriented<br>(Parent-Child)   | A Service Oriented view describes relationships top-down with the Service at the top. For example, the Service Email Provision, would be at the top level with relationships between Configuration Items described, ending at an individual User.  |
| Component Oriented<br>(Child-Parent) | A Component Oriented view starts from the bottom up, with the Service being the top layer.   |
| Inherit Parent Ownership             | When this option is enabled, Child Items that use this Relationship Type will inherit the Parent Item's owners.  |
| Inherit Cost                         | When this option is enabled, Child Items that use this Relationship Type will inherit the costs associated with Parent Item.   |

---

7. Click Save. *Sample Relationship Labels*

8.

---

| Relationship Class | Relationship Name    | Current Item | Relationship Label | Related Item |
|--------------------|----------------------|--------------|--------------------|--------------|
| Service            | Host of/Installed on | Application  | is host of         | Server       |
| Component          | Host of/Installed on | Application  | is installed on    | Server       |

---

## 6.2.2 Delete a Relationship Type

To remove an entry on the Relationship Type list:

1. Select CMS>Relationships  
The Relationship Types screen appears.
2. Click on the Relationship link that is to be deleted
3. Select the Delete button  
A warning message is displayed.

**Relationship Types**

New

**Relationship**

Class: Connection

Name: Manages Data / Uses Database

**Labels**

Service Oriented (Parent - Child): manages data for

Component Oriented (Child - Parent): uses database

Inherit Parents Ownership: Yes No

Inherit Cost: Yes No

Cancel Delete Save

4. Click OK in the warning message.

## 6.3 Durations

**NOTE:** Note, this menu option is only visible when Purchase Orders is enabled in Admin>Setup>Billing.

Note, within the *Help Desk* application this option is found within Supervisor>Service tab.

The Durations menu is used to configure periods of time used for warranty and lease durations. They appear as a drop-down list when a default Warranty Service Level Agreement (SLA) is assigned to an Item Type. The duration selected determines the length of the warranty period.

Within Purchase Orders, the Lease Durations appear when a PO is created for leased Items, to specify the lease period.

**Durations**

New

| Interval Name | Duration (days) |
|---------------|-----------------|
| 30 days       | 30              |
| 90 days       | 90              |
| 6 months      | 183             |
| 12 months     | 365             |
| 2 years       | 730             |
| 3 years       | 1095            |
| 4 years       | 1460            |
| 5 years       | 1825            |

1 - 8 of 8 Results

Within the Duration menu, a number of default durations exist. These can be edited or new durations created.

## 6.3.1 Creating or editing durations

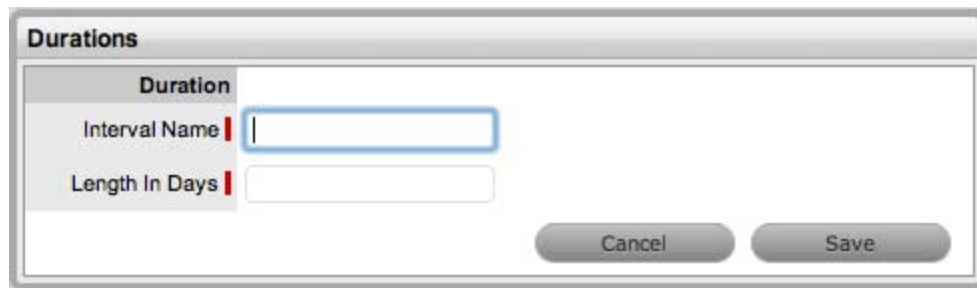
To create or edit durations:

1. Select CMS > Durations

(In the Help Desk application as a Supervisor select the Service > Durations tab)

2. Select the New button to create a new duration

Or, click on the duration Interval Name to edit an existing duration. The individual Duration screen appears.



The screenshot shows a window titled "Durations". Inside, there is a section labeled "Duration" with two input fields: "Interval Name" and "Length In Days". The "Interval Name" field is currently empty and has a blue border. The "Length In Days" field is also empty. At the bottom right of the form, there are two buttons: "Cancel" and "Save".

3. Enter the required interval name
4. Define the time period for the Duration
5. Click Save.

## 6.3.2 Delete a Duration

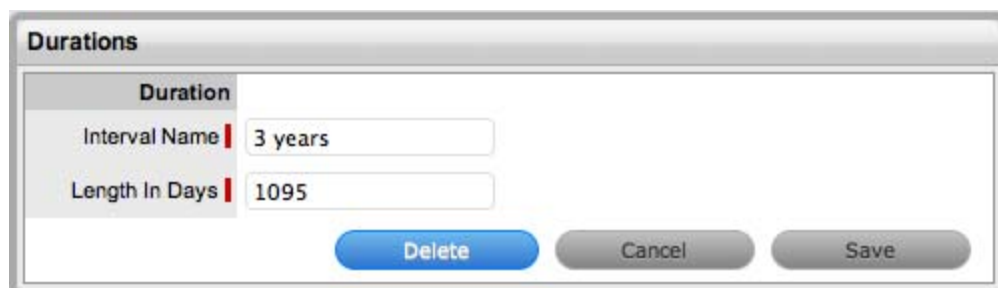
To remove an entry on the Durations list:

1. Select CMS>Durations

The Durations screen appears.

2. Click on the Duration link that is to be deleted
3. Select the Delete button

A warning message is displayed.



The screenshot shows a window titled "Durations". Inside, there is a section labeled "Duration" with two input fields: "Interval Name" and "Length In Days". The "Interval Name" field contains the text "3 years" and the "Length In Days" field contains the text "1095". At the bottom of the form, there are three buttons: "Delete" (highlighted in blue), "Cancel", and "Save".

4. Click OK in the warning message.

## 6.4 Incident Analyzer

---

**NOTE:** Relevant to Organizations with system implementations using Problem Management.

---

The Incident Analyzer menu is used to set parameters to provide proactive Incident and Problem analysis. The Analysis Engine automates inter-process escalation between the Incident and Problem Processes. It automatically groups similar Incidents into a Problem based on the criteria set in the Incident Analyzer tab. Also, the Analysis Engine is able to retrieve Problems relevant to an Incident and present them for consideration.

A Problem is used to manage a number of Incidents related to one cause or Incidents associated with highly critical Items. Problems are managed through the Problem Management Process.

### 6.4.1 Configuring the Incident Analyzer

To configure the Incident Analyzer:

1. Select CMS>Incident Analyzer
2. Click On to enable the Analysis Engine

The Analyzer screen expands.



**Analyzer**

|                                   |   |
|-----------------------------------|---|
| <b>Analysis Engine</b>            |   |
| Status                            | <input checked="" type="checkbox"/> On <input type="checkbox"/> Off |
| <b>Full Text Matching</b>         |   |
| Status                            | <input type="checkbox"/> On <input checked="" type="checkbox"/> Off |
| Relevance                         | <input type="text" value=""/> %                                     |
| <b>Item Classification</b>        |   |
| Status                            | <input type="checkbox"/> On <input checked="" type="checkbox"/> Off |
| Problem Threshold                 | <input type="text" value=""/> Incidents                             |
| Interval                          | <input type="text" value=""/> Days                                  |
| <b>Item Type Classification</b>   |   |
| Status                            | <input type="checkbox"/> On <input checked="" type="checkbox"/> Off |
| Problem Threshold                 | <input type="text" value=""/> Incidents                             |
| Interval                          | <input type="text" value=""/> Days                                  |
| <b>Infrastructure Impact</b>      |   |
| Status                            | <input type="checkbox"/> On <input checked="" type="checkbox"/> Off |
| Relationships                     | <input type="text" value=""/> Items Affected                        |
| <b>Infrastructure Criticality</b> |   |
| Status                            | <input type="checkbox"/> On <input checked="" type="checkbox"/> Off |
| Minimum Criticality               | <input type="text" value="Critical"/> ▾                             |
| <b>Problem Impact</b>             |   |
| Status                            | <input type="checkbox"/> On <input checked="" type="checkbox"/> Off |
| Weighting                         | <input type="text" value=""/> Affected Users                        |
| <b>Problem Urgency</b>            |   |
| Status                            | <input type="checkbox"/> On <input checked="" type="checkbox"/> Off |
| Weighting                         | <input type="text" value=""/> Incidents                             |

3. Enable the relevant Analyzer functions
4. Define the relevant parameters for one or all of the following options:

5.

| Field                      | Description  |
|----------------------------|--|
| <i>Full Text Matching</i>  | Searches for matching text between Incidents and Problems. We recommend the Relevance percentage be set between 75-80%.  |
| <i>Item Classification</i> | Searches Incidents based on matching the Item and Problem Classifications. If the number of Incidents entered in the Problem Threshold is met within the Time Interval entered, a new Problem will be created.   |
| Item Type Classification   | Searches by matching Item Type and Problem Classification of Incidents. If the matching number of incidents in the Problem Threshold for the Time Interval is met, a new Problem is created.<br><br><b>NOTE:</b> Note: We expect either Item/Classification or Item Type/Classification would be used exclusively.   |
| Infrastructure Impact      | Automatically escalates an Incident to a Problem if the number of related Items affected by the Incident is equal to or greater than the value entered here.   |
| Infrastructure Criticality | Automatically escalates an Incident to a Problem if an Incident's Item criticality is equal to or greater than the value selected here. Select the criticality level from the drop-down list.  |
| Problem Impact             | Used to calculate the relevant impact rating that is assigned to an auto-created Problem.<br><br>Multiplying by 4 the number entered in the Weighting field will give the required number of Affected Users for the problem to have the highest Problem Impact of Severe.<br><br>The system calculates the number of Affected Users on the number of owners attached to an Item.<br><br>An integer between 1-6 for the Problem Weighting is recommended. |
| Problem Urgency            | Used to calculate the relevant urgency rating that is assigned to an auto-created Problem.<br><br>Applied when a new Problem is created or an Incident is added to an existing Problem.<br><br>Multiply by 4 the number entered in the Weighting field to get the required number of current Incidents or Problems for the rating of Urgent to be applied.<br><br>An integer between 1-4 for Problem Urgency is recommended.                             |

6. Click Save.

# A Appendix

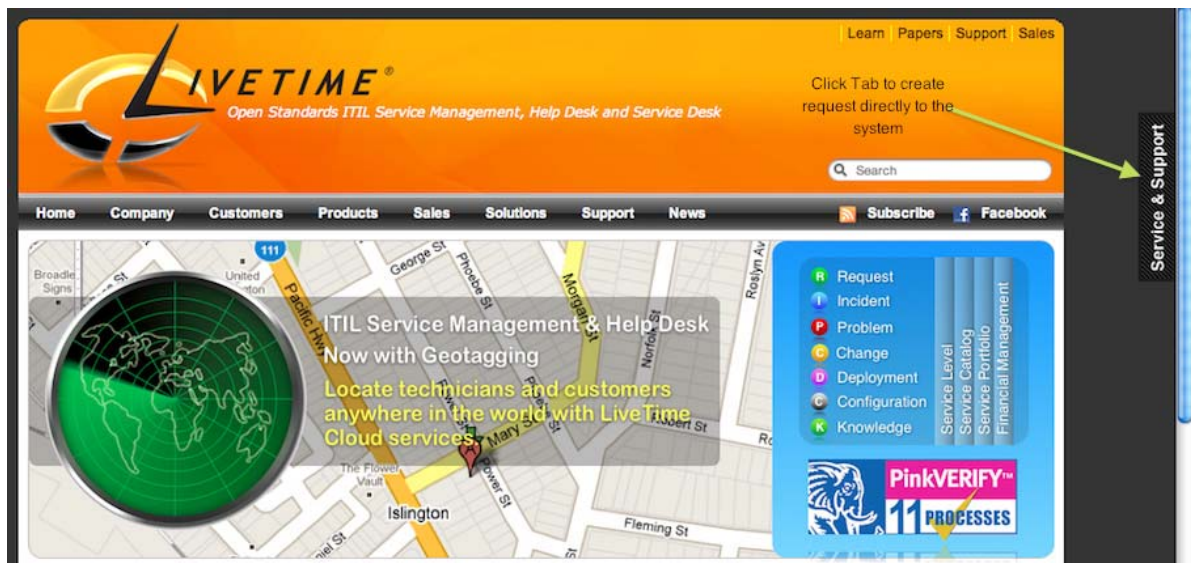
## A.1 Embedded Support Form

To create requests directly from a website, add the following script, with an amendment to the Protocol and BaseHost details, to the target Web Site Page Source:

```
<script type="text/javascript" defer="defer">  
var protocol = "https://"; // use "http://" if not running ssl  
var baseHost = "servicedesk.mycompany.com"; // service desk hostname  
document.write(unescape("%3Cscript src=" + protocol + baseHost + "/LiveTime/js/livetime.js'  
type='text/javascript'%3E%3C/script%3E"));  
</script>
```

In the above script, adjust the details for the protocol and baseHost, to those of the server hosting the support system.

The following functionality is now accessible from your designated Web Site:



Request form displayed for completion:

The screenshot displays the 'Service & Support' interface. At the top, there is a dark header with a user icon, the text 'Service & Support', and a 'Close' button. Below the header, there are two tabs: 'New Request' (which is active) and 'Knowledge Base'. The main content area contains a form with the following fields:

- Email:** A text input field.
- Subject:** A text input field.
- Description:** A large text area for entering details.
- Request Type:** A dropdown menu currently set to 'Incident'.

At the bottom of the form is a 'Create' button. The footer of the interface includes the text 'Powered by LiveTime.' and a 'Login' button with a user icon.

## A.2 Email Polling & Request Creation via Email

The Email Polling feature automatically manages incoming support requests via email, helping organizations to respond quickly and efficiently to Customer inquiries and minimizes time-consuming data entry tasks for Technicians.

### A.2.1 Email Polling

By itself, the Email Polling feature acts as an auto-responder.

To turn on Email Polling:

1. Log in as Administrator
2. Select Setup>Email
3. Enter the Server Details
  - These are the system accounts for the incoming and outgoing mail servers.
4. Within the Setup Tab, select Yes for Email Polling

5. Complete the Interval field

Specify (in minutes) how long the system should wait between automated scans of the system email account. (At minimum this can be set to 5 minutes.) At the specified interval, the system will automatically scan the inbox of the system email address for messages.

6. Define remaining General, Requests and Notes Settings:

---

**General Settings**

---

|                         |   |
|-------------------------|---|
| Email Polling           | <p>Enable Email Polling to allow the application to check for new email received in the mailbox on the incoming server defined within the Server tab.</p> <p>For new messages that are received, the system will send a message to the sender acknowledging their message. System generated messages are customized within the Setup&gt;Email&gt;Templates tab.</p> <p><b>NOTE:</b> This option will be locked down if the Create via Email option is selected.</p> |
| Interval                | <p>Enter the time period the system will use to check the incoming server for any messages sent to the support system.</p>  |
| Include Banner          | <p>Select Yes to include a banner within emails sent from the system.</p> <p>The banner will be derived from:<br/>Setup&gt;Customize&gt;Setup&gt;Public Banner.</p>   |
| Email Errors            | <p>When enabled, details of any system errors occurring while the application is running will be sent to the development lab.</p>   |
| Copy Type               | <p>For emails sent within requests, define if the Technician is to be copied or blind copied the correspondence.</p>  |
| Requests                |   |
| Create/Update via Email | <p>Select this option to enable requests to be created from emails addressed to the support system and Team addresses aliased on the email server.</p> <p><b>NOTE:</b> Email Polling will be locked down to Yes when this option is selected and the Accept Anonymous option is displayed.</p>  |
| Accept Anonymous        | <p>When enabled, the system will create requests from emails received from email addresses that do not exist in the application's database. (Refer below for more information regarding this setting.)</p>  |
| Notify Alternate Team   | <p>When enabled, and if there is more than one Team created for a Process, within the Summary tab of a request the Alternate Team field is displayed. Members of the Alternate Team will be notified relative to the settings defined for the Current Team, and for New Notes, if Technicians is selected in the New Notes screen.</p>  |

---

---

## General Settings

---

|                          |  |
|--------------------------|--|
| Self Mail                | When set to Yes, new Notes created by a Technician or Customer are also sent to them when they save the Note.  |
| Include Request Status   | When enabled, the system will include the request Status within the Email Subject line of any correspondence sent from the system, regarding a request.  |
| Include Request Priority | When enabled, the system will include the request Priority within the Email Subject line of any correspondence sent from the system, regarding a request.  |
| Include Request Subject  | When enabled, the system will include the content from the Subject line of a request within the Email Subject line of any correspondence sent from the system, regarding a request.  |
| Notes                    |  |
| Parse Instance Prefix    | The Instance prefix is used to process email correspondence from multiple instances. If this is not required, set the option to No.  |
| Default Recipients       | Within the new Notes editor of requests, the default email settings can be defined for the recipient groups. Define the groups who are more likely to be sent every New Note created related to a request.   |
| Default Locale           | Set the default language file to be used for email correspondence. The option set is applied to the Email Locale field in the Customer and User Information screens and can be adjusted on a per account basis, as required.<br><br><b>NOTE:</b> The content for automated emails sent from the system for languages other than English, is defined within the Localization>Content tab. |

---

7. Click Save

8. Customize the content of emails automatically sent by the system within the Templates tab

This includes [Handshaking \(CloseRequest\)](#), [No Account](#) and [Signature](#) Templates. The message prefix used by the system to recognize correspondence related to requests stored in the system can also be edited within the Prefix template.

If the request creation feature is turned off (i.e., the Create Incidents checkbox is not ticked), a reply is automatically emailed to the sender. The email informs the sender that requests are not received via email, and if they want to log a request they are advised to do so via the Customer Portal. The content of the Responder message can be configured by the Administrator in Setup> Email>Templates.

---

**NOTE:** Important: Before using the Email Polling feature, ensure that the main system email accounts inbox is empty. Otherwise, any messages in the inbox will be acted upon either with an auto-response message being bounced back to the sender or the system will attempt to create requests for the messages. The action will depend on the application's settings.

---

Please take special caution if the main system email account is an IMAP account. Unlike POP accounts, messages generally are not removed from an IMAP server's inbox after they are read. This means that failure to clear out the inbox prior to using the Email Polling feature could result in auto-responses being sent to (or requests being created for) every message in the inbox.

## A.2.2 Creating requests via Email

If the Create Incidents feature is turned on, the system will attempt to either create a new request or update an existing one each time a message arrives in the system inbox.

To activate this feature:

1. Tick the Create/Update via Email checkbox under Setup>Email>Setup
2. If all Team members are to receive a copy of the notification that a new request has been received, set the Notify Alternate Team option within the Information tab of the Team.

To create a request via email, a Customer with a pre-existing account can simply send an email message describing the issue to the appropriate Team email address (refer to Setting Up Team Aliases, below).

When a new message arrives, the system identifies the Customer by matching the sender's email address against the addresses of Customers registered in the database. If it fails to find a match, an email is bounced back to the sender notifying them that they must create an account before creating requests via email. The content of this message is configured in the No Account field under Setup>Email>Messages.

If a matching Customer account is found, and the address that the email was sent to belongs to an existing Team, a request is created in the system. The body of the email becomes the main text of the request description. Any attachments included with the email will also be attached to the request. The new request is assigned a priority type of Medium, and uses the default Classification - General.

If the Customer only owns a single Item, this Item is automatically assigned to the request and the standard system SLA check of Customer>OrgUnit>Item will be run to verify which SLA should be assigned to the request.

If the Customer owns multiple Items, the system can automatically assign the relevant Item upon request creation if the Customer prefixes the email subject with 'Item #' followed by the Item identification number as recorded in the CMDB. If the Customer has an account in the system and is assigned as an owner of the Item, the system will refer to Relationships and Skills configured in the CMDB, resulting in the request being routed to the most relevant Technician for the job.

In the case where the "Item #" is not included in the email subject line, and if the matching Customer is assigned zero or multiple Items, the new request uses the Unknown Item and the system default SLA. It is assigned to the Team or Technician who support the Unknown Item. When the Item is changed from Unknown to a specific Item, the Team or Technician assigned may change based on the Team configured to support the Item. The SLA may also be automatically reset by the system as it applies the SLA derivation logic of Customer>OrgUnit>Item to assign the relevant SLA.

Once the request has been created, an entry is added to the request Audit Trail, stating the request was generated via email. The Customer and the assigned Technician then receive emails notifying them of the request number and details.

## A.2.3 Monitoring Tools and Request Creation

To automatically create requests from emails sent by monitoring tools, the monitoring tool must be created as a Customer within the system. The email address used by the monitoring tool can be the system default support address or a specific Team address. (See: Setting up Team Aliases below for sending to a Team address.) Once the request is created, an entry is added to the request Audit Trail, stating the request was generated via email. The monitoring tool Customer account and the assigned Technician receive emails notifying them of the request number and details.

If the monitoring tool Customer account is assigned to a single Item, this Item is automatically associated with the request and the standard system SLA check of Customer>OrgUnit>Item will be run to verify which SLA should be assigned to the request.

If the monitoring tool Customer account is associated with multiple Items within the CMDB, the system can automatically assign a specific Item upon request creation if the monitoring tool email prefixes the email subject with 'Item #' followed by the Item identification number as recorded in the CMDB. In this situation, if multiple Customers own the Item and if the request is to be associated with a different Customer after the request is created, Technicians can update the Customer details to move it from the monitoring tool Customer account within the Customer tab of the request Summary Tab.

In the case where the "Item #" is not included in the email subject line, and if the matching monitoring tool Customer account is assigned zero or multiple Items, the new request uses the Unknown Item and the system default SLA. It is assigned to the Team or Technician who support the Unknown Item. When the Item is changed from Unknown to a specific Item, the Team or Technician assigned may change based on the Team configured to support the Item. The SLA may also be automatically reset by the system as it applies the SLA derivation logic of Customer>OrgUnit>Item to assign the relevant SLA.

## A.2.4 Adding Notes via Email

Managing requests via email is handled by the application sending its initial email with the subject line prefixed by the 'Incident #' or in the case of Change Management, prefixing the RFC subject line with 'Change Request #', followed by a series of numbers that make up the individual request identification number. Customers simply reply to this email and their correspondence is assigned to the relevant request, and any attachments are also uploaded to their request. Technicians can also reply to these emails to update the request, if convenient.

When the Note has been created, an entry is added to the request Audit Trail, indicating that a Note was added via email. The Customer and assigned Technician are then sent emails alerting them to the creation of a new Note.

## A.2.5 Setting Up Team Aliases

For an incoming message to result in the successful creation of a request, it must be addressed either to the main system email address or to an email account that is an alias for the main system account and assigned to an existing Incident, Change or Service Request Team.

For example, if your main system email address is support@yourcompany.com and you want to set up three Teams, Team A, Team B and Team C, those three Teams should use email addresses that are aliases for support@yourcompany.com.

- ♦ teamA@yourcompany.com should forward messages to support@yourcompany.com
- ♦ teamB@yourcompany.com should forward messages to support@yourcompany.com
- ♦ teamC@yourcompany.com should forward messages to support@yourcompany.com.



---

**NOTE:** Consult the documentation that came with your mail server for information on setting up email aliases.

---

Using this technique, any message that is sent to teamA@yourcompany.com, teamB@yourcompany.com or teamC@yourcompany.com is automatically forwarded to support@yourcompany.com. The Email Polling mechanism then picks up those messages and responds accordingly. The resulting request is assigned to a Technician within the Team the message was addressed to.

An alternate configuration would involve setting a single Team's email address to the main system address, which by-passes the need for aliases but does not allow the system to funnel requests to specific Teams.

## A.2.6 Troubleshooting

If you have trouble setting up or using email polling and creation, keep the following tips in mind:

- ◆ For the request creation feature to work properly, both the Email Polling and Create/Update via Email options must be selected under the Admin>Setup>Email>Setup tab
- ◆ Only emails sent to the main system address or to an alias that is currently in use by an existing Team can be accepted
- ◆ All pertinent information regarding the main system email address and the incoming and outgoing mail servers must be completed correctly
- ◆ Ensure the Customer sending the email has a valid email address within the system.

---

**NOTE:** Only Incidents, Change and Service Requests can be created via email. If a User attempts to send an email to a Problem Team, a reply email will be forwarded to them informing the User that the email must be sent to an Incident, Change or Service Request Team, for a request to be logged with the system.

---

## A.3 Web Services

The Web Services Interface enables third party applications to interact directly with the service management application in a secure and controlled fashion. The interface is based on the SOAP standard for Web Services. For more information about SOAP Web Services, please see: <http://www.w3.org/standards/webofservices/>.

The system's Web Services Interface is intended for developers to use to extend the application's accessibility and requires a basic familiarity with Java. For detailed information and instructions, please contact support@livetime.com to obtain a copy of the *WebServices API* document or visit <http://www.livetime.com/developer/>.

## A.4 Internationalization

*Internationalization* is the process of designing an application so that it can be adapted to various languages and regions without engineering changes. Sometimes the term internationalization is abbreviated as i18n, because there are 18 letters between the first "i" and the last "n."

The system is an internationalized program that has the following characteristics:

- ◆ The addition of localized data that allows the same executable to run worldwide

- ♦ Textual elements, such as status messages and the GUI component labels, are not hard-coded in the program. Instead they are stored outside the source code and retrieved dynamically
- ♦ Support for new languages does not require re-compilation
- ♦ Culturally-dependent data, such as dates and currencies, appear in formats that conform to the end user's region and language
- ♦ The application can be localized quickly.

*Localization* is the process of adapting software for a specific region or language by adding locale-specific components and translating text. The term localization is often abbreviated as l10n, because there are 10 letters between the "l" and the "n."

## A.4.1 Internationalization

The support system internationalized framework is very intuitive and flexible, which allows Users to localize it for a particular language and character encoding schema.

The primary task of Users performing localization of the application is translating the user interface elements in the external text file - LiveTime.properties.

The following steps are a guide through the localization process. This example assumes French localization of the application and uses the ISO-8859-1 character set.

1. *Ensure the Desktop's Operating System has the appropriate character set installed*

The localization file and rendering requires the character set to be available for data entry and data presentation.

2. *Ensure the RDBMS is created using the appropriate character set*

This is required so that French data entry can be successfully saved and retrieved from the database.

3. *Specify the correct character set encoding for the system*

Edit the 'Properties' file (/CONTAINER\_APPS\_PATH>/LiveTime/WEB-INF/LiveTime.woa/Contents/Resources folder) and specify the character set to use for presentation to the end user. This character set is sent to the end users to control presentation in both the user interface and outbound email.

4. *Edit the UI strings in the external properties file*

The 'LiveTime.properties' file (/CONTAINER\_APPS\_PATH>/LiveTime/WEB-INF/LiveTime.woa/Contents/Resources folder) stores the externalized user interface content. This file is stored in plain text, the default (English) is encoded using the ISO-8859-1 character set. Alternative versions of this file can be created in any text editor that allows the file to be saved in the necessary character set.

The first step in creating a local version of this file is to save a copy of it, representing the appropriate language. For this example of the French translation, there is no need to worry about the file encoding, simply save a copy of the file called 'livetime\_fr.properties'

## A.4.2 Simple Messages

The copy of this file consists of a collection of name-value pairs, each are broken up into clusters representing user interface components.

For example:

ClassName.greetings=Hello

ClassName.farewell=Goodbye

ClassName.inquiry=How are you?

The 'name' or 'key' section (ClassName.greetings) of these strings is of little relevance to the end user except to note that if they are changed, the system is not able to look them up.

The 'value' component of these pairs (Hello) represents the corresponding user interface value. The (French) translator can safely edit these values and they will appear within the system.

ClassName.greetings=Bonjour.

ClassName.farewell=Au revoir.

ClassName.inquiry=Comment allez-vous?

### A.4.3 Compound Messages

Compound messages contain variable data i.e., data that the support system substitutes into a message at run time. For example, given the message 'Hello Sunshine', the string Sunshine may vary. This message is difficult to translate because the position of the string in the sentence is not the same in all languages, or alternatively the value may need to be generated by the application based on some business logic.

Where this substitution is necessary, the localized strings have a set of braces containing an id number (a substitution variable). These blocks are replaced at run time by the system and are identified by its presence. The localized version of a given string must contain the same number of substitution variables.

For example:

ClassName.helloSunshine=hello {0}

This will render as "hello sunshine", however we could modify this message to read "sunshine, hello" by doing this:

ClassName.helloSunshine={0}, hello

1. Edit the Locale Definitions file

The 'LiveTimeLocales.xml' file (/Resource folder) defines the language code and charset used in order to process the strings defined in the external properties file.

Typically, this is the charset used when the external properties file is saved.

By default the following language locale is selected:

```
<LOCALE language="en" country="" charset="ISO-8859-1"/>
```

To enable the French external properties file to behave correctly, comment the above line and uncomment the following line:

```
<LOCALE language="fr" country="" charset="ISO-8859-1"/>
```

For convenience, many values are already supplied in this file so it is just a matter of uncommenting the necessary entry.

If an entry for the locale language is non-existent, then define it in the file by supplying the language code, country code, and charset, as illustrated in the above examples.

1. File Names.

The names of the localized files do follow a standard. In the French example, `livetime_fr.properties` was the resulting file name. The 'fr' component of this name comes from iso 639-1. A full list of these codes is available here:

<http://www.ics.uci.edu/pub/ietf/http/related/iso639.txt>

*Example of Login Page Translated:*

Bienvenue à notre système en ligne de soutien. Veuillez entrer votre username et mot de passe à l'ouverture

Nom d'utilisateur

Mot de passe

Ne pas oublier le code d'accès

Connectez-vous

[Afficher la base des connaissances](#)  
[Afficher les forums](#)  
[Enquêtes](#)  
[Afficher les interruptions de service](#)  
[Afficher les interruptions de service planifiées](#)

[Mot de passe oublié](#)

Licensee: LiveTime Software Inc.

## A.5 AMIE Import

The Item Import menu allows Configuration Items to be imported from an external asset management database using Database Mapping (AMIE) and via a .CSV file.

Database Mapping with the AMIE option can be used with common asset management systems, including:

- ◆ Absolute Manage 6.0
- ◆ Centennial Discovery 2005, 9
- ◆ Express Software Manager 9.0, 9.5
- ◆ HP Universal CMDB 8.0
- ◆ LANDesk 8.5, 9.0, 9.0 (Hardware)
- ◆ LANrev 5.1
- ◆ LiveTime Discovery 2005, 2007

- ♦ LOGINventory 4.3
- ♦ Manage Engine Desktop Central 7.0
- ♦ Microsoft SMS Version 2003 SP1
- ♦ Microsoft SCCM 2007
- ♦ Spiceworks 4.0, 5.0
- ♦ ZENworks Asset Management 6.5+
- ♦ ZENworks Configuration Management 11.1, 11.1 (Hardware).

If Items have been managed externally, adding them to a .CSV file allows them to be easily imported into the support system.

See Item Import:

- ♦ [AMIE](#)
- ♦ [CSV File](#).

