

ITIL HEROES' HANDBOOK



ITIL FOR THOSE WHO DON'T HAVE THE TIME

Hi there

I am **Alex D Paul**, I work for AdventNet as Product Manager for ManageEngine ITIL Solutions. After a few utterly boring Information Technology Infrastructure Library (ITIL) presentations and speeches completely based on the blue book in Las Vegas, L.A, London, Sao Paulo, Singapore, Brisbane, Melbourne, and Sydney, I thought I should try writing what IT managers really need to know in an interesting way so that they'll actually read it. With all due respect, the blue book covers every aspect of ITIL Service Support and is the ultimate reference guide. This is for all those who don't have the time and patience, but still quickly want the juice. I didn't find an interesting ITIL Service Support article and here is my attempt in writing one. I hope you find it useful

I would love to know your views, send them to at alexdpaul@adventnet.com.

Chapter

1

Introduction



What You Can Expect From This White Paper >

The goal of this white paper is to help you understand ITIL in the right spirit without getting lost in the buzzwords. Just to keep you on your feet, I'll start with ITIL basics but focus more on ITIL implementation. Don't worry if you are just getting started with ITIL, It is written simple enough for anyone with a basic understanding of IT.

ManageEngine's Approach to ITIL >

Most ITIL solutions in the market are too complicated. Let's take an example where a customer wants to implement an ITIL solution. First, customers have to get ITIL consulting to define ITIL processes and align it with business goals. The next task is to buy ITIL software; most ITIL solutions offer incident, problem, and change management as different modules. Even after choosing the software it takes months for product consultants to implement the process. The cost and time factor to implement an ITIL solution drives SMBs away.

ManageEngine's mission is to make ITIL simple so that every business can benefit from it. ManageEngine automates ITIL Service Support, without expensive consultants or shelling out on customization. When you install the products, you will get the ITIL Service Support framework with Incident, Problem, Change and Release Management framework built over a CMDB. You can get started from day one, with minimal configurations to suit y

What is ITIL? Facts and Not History >

A little history is essential here. ITIL is a framework of best practices to manage IT operations and services defined in the mid-1980s by the Government of Commerce, UK. ITIL's main objective is to align business and Information Technology, allowing organizations to implement what is relevant to their business. ITIL is just documented common sense from years of learning from helpdesk managers around the world.

Here is what you really need to know

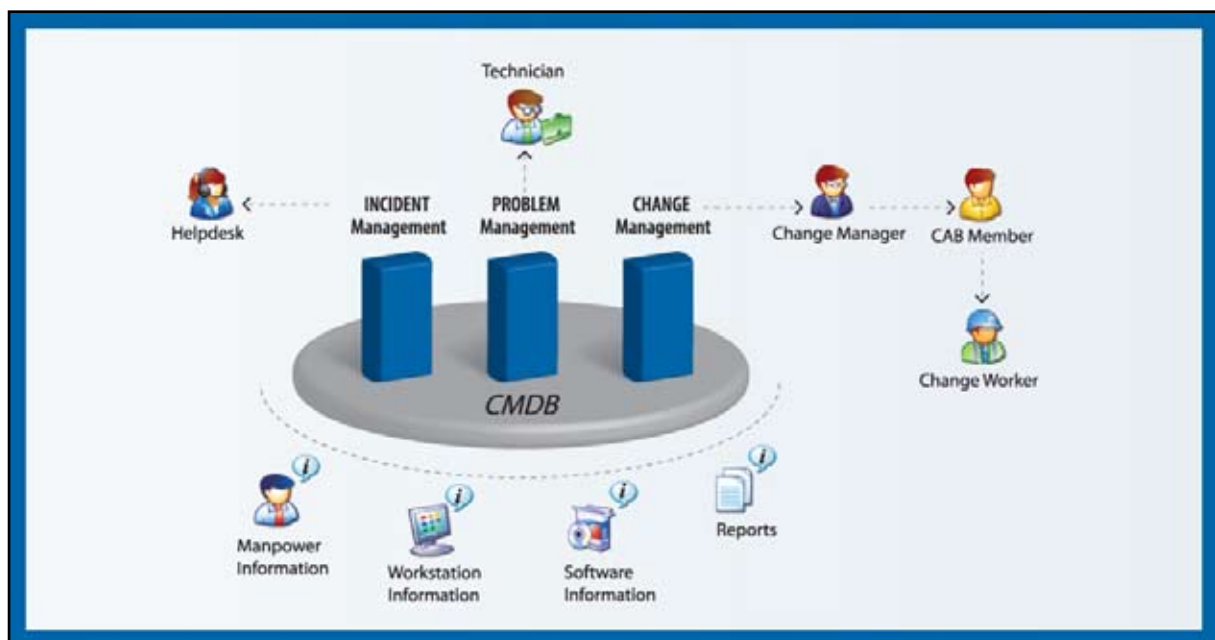
Quick Facts	Let Me Explain
ITIL is not a standard	Consider it good advice from IT Managers who have been there. It is up to you to take it or not. You can implement ITIL the way it works best for you.
You cannot get your company ITIL-certified	If you are targeting certification, you must get ISO 20000 and BS 15000 standards, based on ITIL.
There are no ITIL-compliant products	No one can certify products as ITIL-compliant. It is common for people to refer to PinkElephant's certification. Please read the fine print. more >>
ITIL is for small, medium and large companies	It's true! Anyone can implement ITIL. It makes sense when the size of your helpdesk team is more than 5.
ITIL is not from a single company or person	ITIL is not backed by a single company or person. There is no profit motive or personal promotion.

ITIL is not about Complicated Process Maps >

ITIL is not about complicated strict process maps. You should not follow someone else's process or the processes defined in some book. When you learn ITIL, don't start drawing detailed process maps for all the modules, taking it to consultants to ask whether they are in line with the ITIL specifications. The Truth is that consultants cannot help you without understanding how your support works.

ITIL Service Support will be our focus ›

Today, IT Helpdesk is the lifeline of any business from small to large and most IT managers and helpdesk managers are struggling to have an efficient and productive helpdesk. We will focus on this problem here. As ITIL Service Support offers best practices framework for IT helpdesk, let us see how ITIL can help helpdesk managers and IT managers. ITIL's IT Service Support Module offers best practices to make sure IT Services are highly available. ManageEngine ServiceDesk Plus Enterprise Edition implements these IT Service Support modules.



Chapter

2

Incident Management

Incident Management in your daily life.



Incident Management

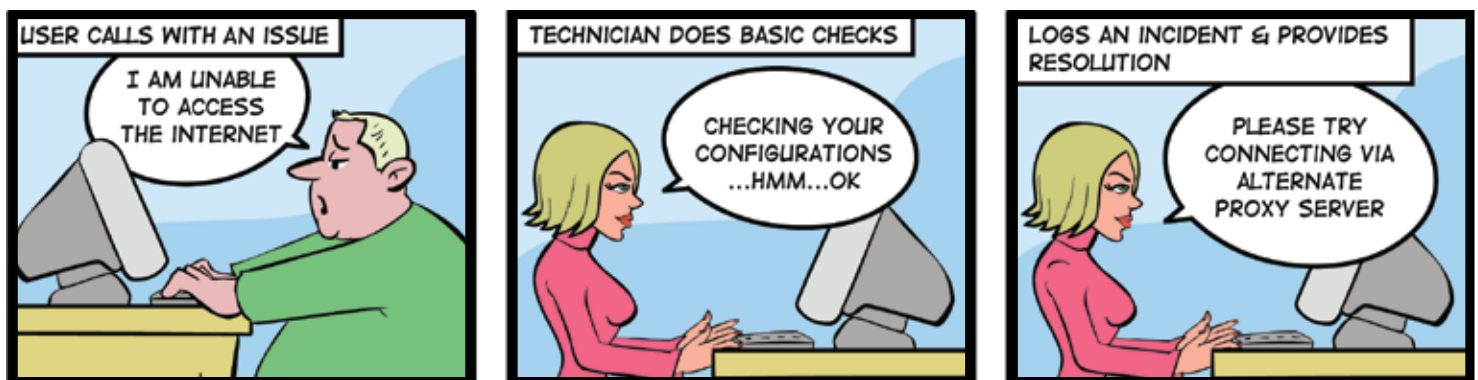
An incident is a disruption of normal service that affects the user and business. The goal of Incident Management is to restore IT services to the normal state as soon as possible with workarounds or solutions to make sure that it does not affect business.

An incident is an event that is not part of the standard operation; it is an event that you don't want to happen but eventually happens. In simple words, Incident Management is a process to manage disruptions in critical IT services and restore them ASAP.

It may sound like a sugar-coated-sophisticated trouble ticketing system. However, Incident management tells you how to implement an IT Helpdesk that understand and works to meet business priorities.

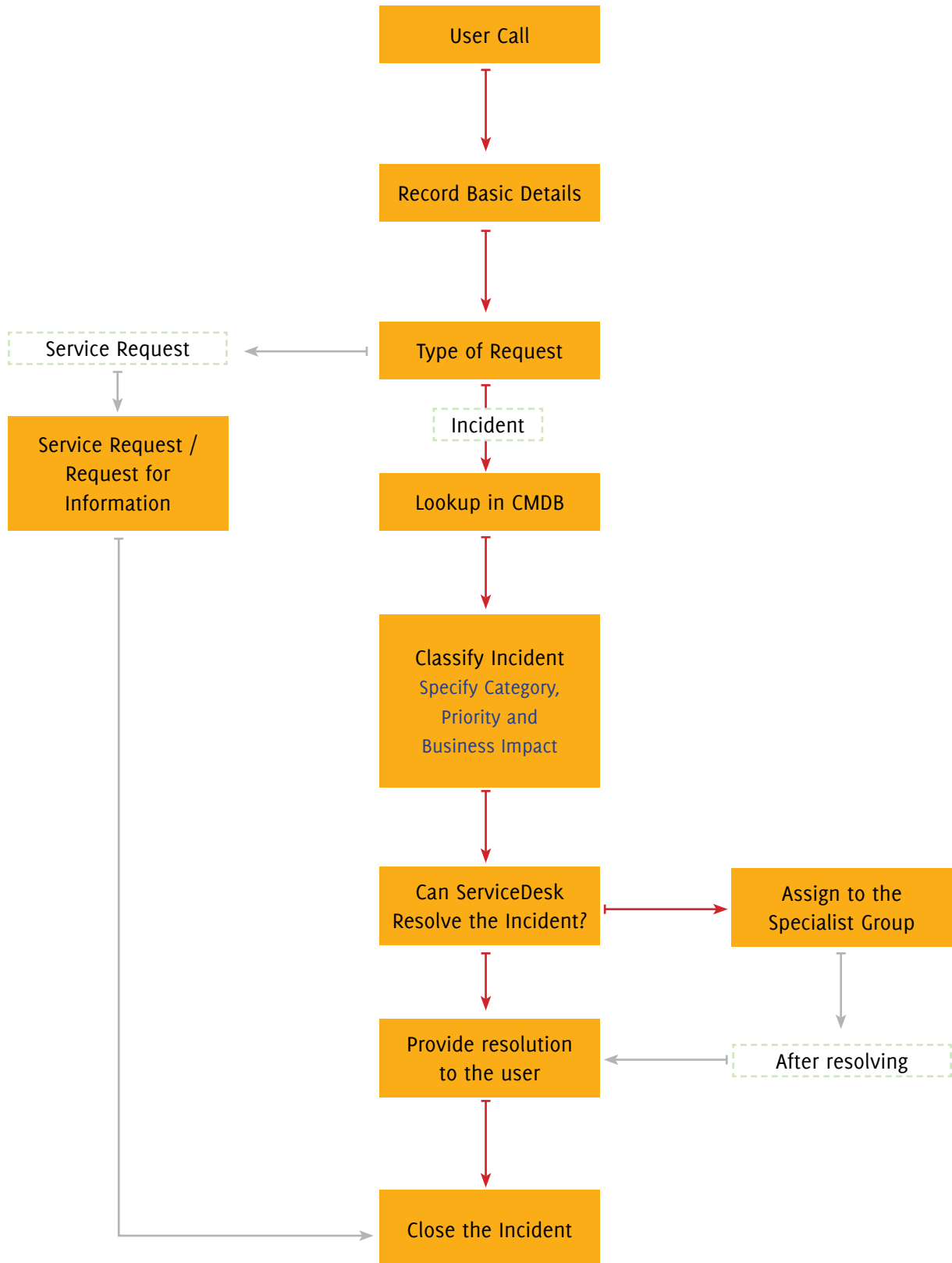
Incident Management outlines the need to have a process to restore services. ServiceDesk function is the glue that binds the Service Support modules together with a Single Point of Contact to the user and ensures that IT Services stay focused on business.

- Record Basic User Details
- Is the user reporting an outage or asking for a new service
- If he is asking for new service – New Service Request
 - o Train your helpdesk analysts to get back to users who ask for new services
 - o Train them to record details of requests with urgency and priority
 - o Train the helpdesk team to look for new service plans and milestones
 - o Train them on where should they look for answers to FAQs
- If he is reporting about outage or disruption—Incident
 - o Determine whether it is an Incident or not with basic diagnosis
 - o Check whether you can help with a resolution from the knowledge base
 - o Assign Incident to Specialist Support Group
 - o Work closely with Specialist Support Group to provide resolution to the user
 - o Close the incident with user confirmation



Here's a sample Incident Management workflow. Consider this as a basic format and make changes wherever required.

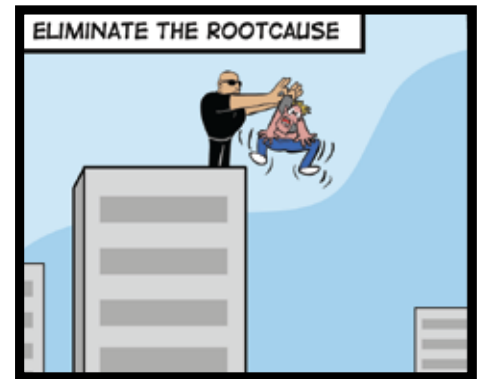
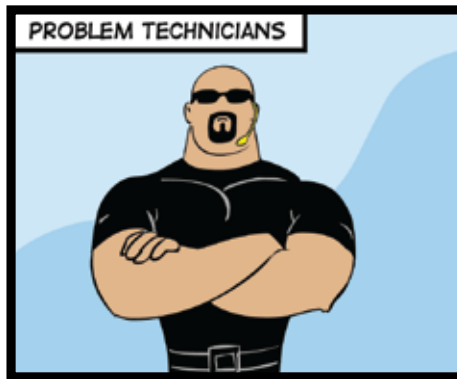
Incident Management workflow



Chapter

3

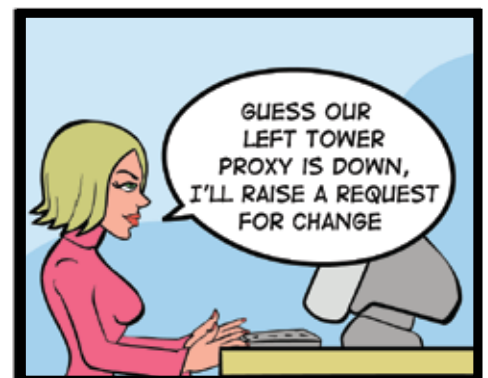
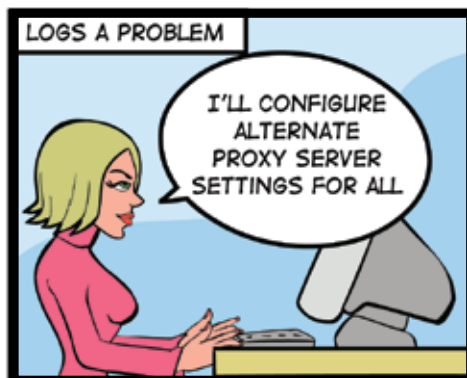
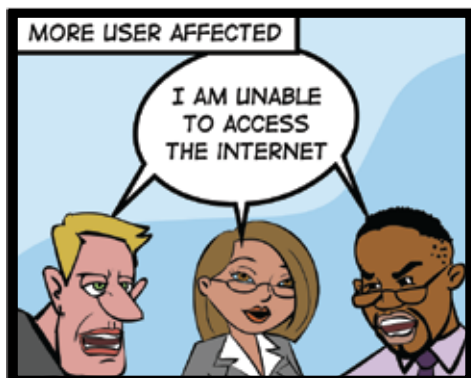
Problem Management



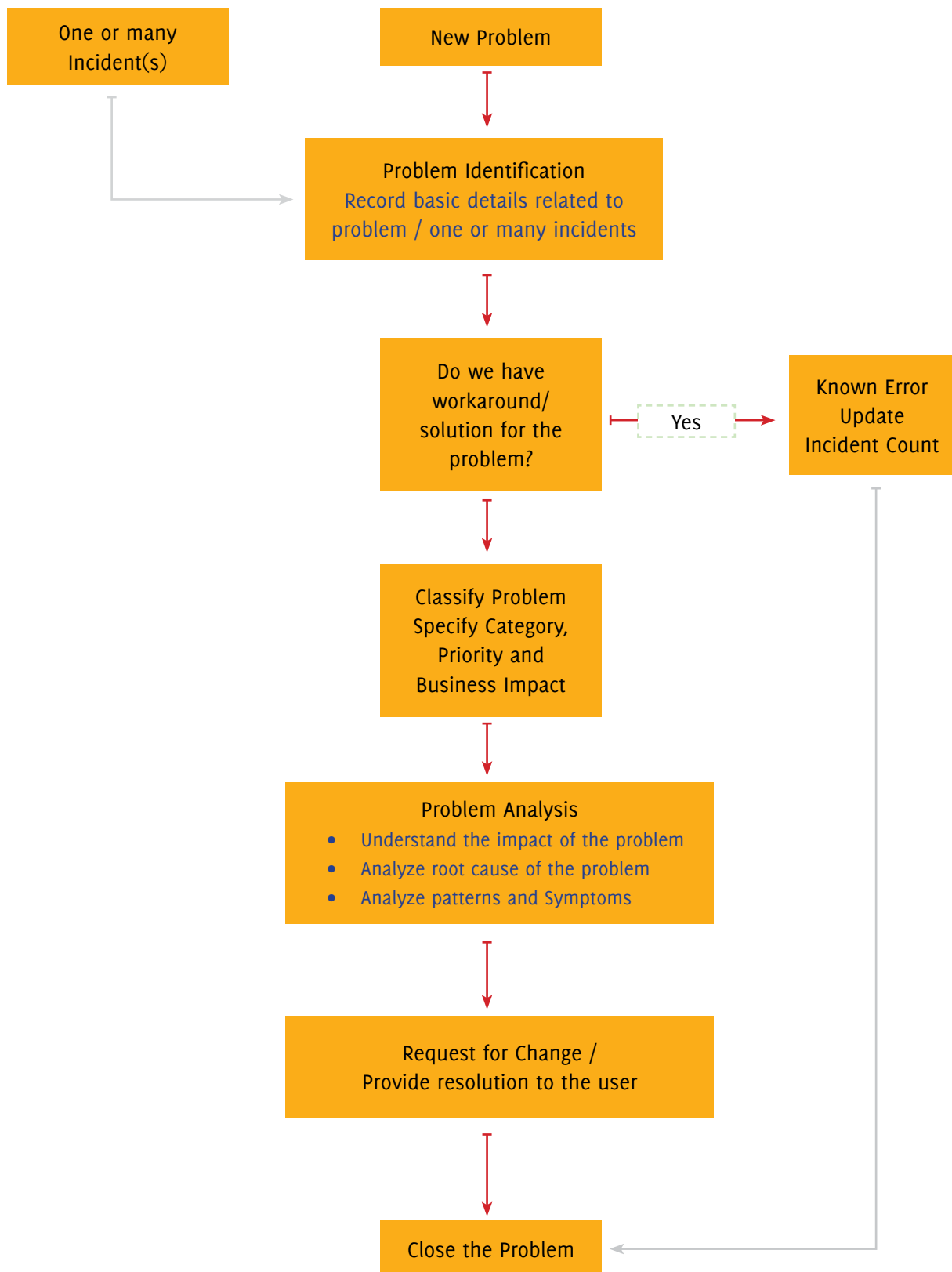
Problem Management

The goal of Problem Management is to find the root cause of incidents and reduce the impact on business. Problem Management is a proactive approach that prevents recurrence of incidents.

Problem management brings strategy to your helpdesk; it helps you to move from your firefighting mode to a proactive mode. In simple words, the disruptions faced by users are mostly different instances of a problem. When you find and eliminate the root cause of all the Incidents, you also prevent future incidents.



Problem Management Workflow



Record the Problem and Match with Known Error Database

A problem can be raised directly or by combining one or more Incidents. Once the problem is recorded, the problem technicians will check if it has been reported before and if there is a known workaround or solution.

Problems that have Workaround/Solution: Known Error

If the reported problem has a workaround or solution, it is a Known Error. The Helpdesk technician can get back to the user with the workaround/solution. The technician needs to note that the problem has occurred and increase the problem count to measure the frequency of the problem.

Classify the Problem to Determine the Right Priority

It is important to classify the problem with

- Category, Sub Category and Item
- Business impact and urgency

The classification helps technicians to determine the priority of the problem.

Analyze the problem to determine the root cause

When the problem is classified, it gives a clear picture to the problem technicians as to where they should start. Depending on whether the problem is in the users' machine, or in the proxy server or in the firewall, technicians may use various tools to diagnose and resolve it. The technician records all symptoms and the root cause along with a workaround or solution.

Provide Resolution or Initiate a Request for Change

Technicians can get back to users if there is a resolution readily available. If the problem requires a few changes in the system, they can provide a workaround and initiate a Request for Change.

Eg: A group of users are not able to access the Internet, the root cause of which is the firewall. Technicians can provide users with a workaround to access the Internet and initiate a Change Request to replace the firewall to prevent Internet unavailability in the future.

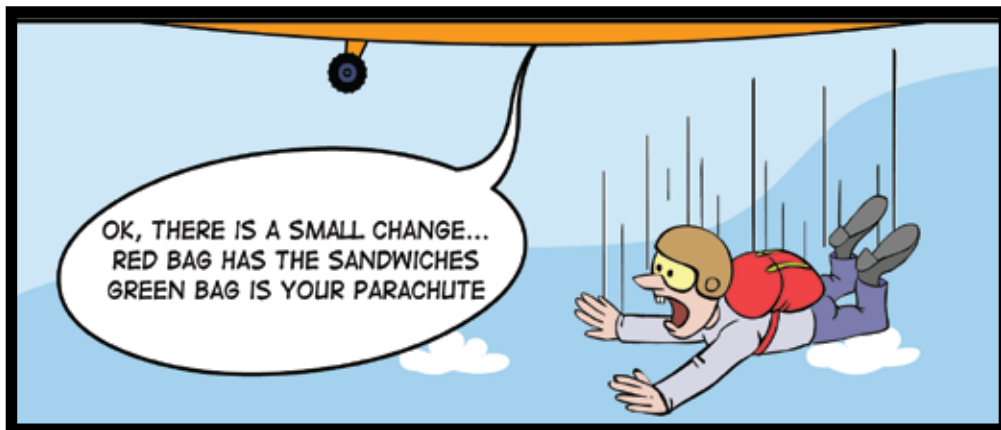
Closing the Problem

Although the Problem technicians close the problem, it is the responsibility of helpdesk engineers or frontline support staff to update users about all the activities. When users have a single point of contact, they don't have to repeat themselves to different technicians. Also, the frontline staff who have logged the call ensure that the solution meets the users' needs exactly.

Chapter

4

Change Management



Change Management

The change management process helps you to co-ordinate changes with minimal disruptions and accepted risk.



Most small businesses feel that Change Management is too controlling and that it is not possible to implement change quickly when you have a long-drawn process. Change Management will not be complicated unless you plan to complicate it. It is about having a simple plan and organizing yourself so that you don't have surprise downtime.

In my opinion every organization needs change management. It helps IT Managers and IT staff to keep executives and stake holders informed when important change happen. When everyone from executives to IT staff is involved from decision-making to implementation it leaves no space for unwanted surprises.

Why did we adopt change management?

Our recruitment process for a fresher includes two parts: aptitude tests and personal interviews. Users have to log on to our testing platform, Zoho Challenge, which runs on a Windows server. Just like another day and another test, our HR team seated all our candidates, in preparation for the test.

The server was down; so our testing system was down. And...I tell you...it was really embarrassing.

When we checked, we found that our helpdesk staff had applied the latest security patch in the system and it failed to start. It turned out that it was not completely their fault as they had a policy to ensure that the latest security patch was applied on all servers.

It was a simple communication gap, but a big loss of face.

Lesson:

We did not have a method to communicate to the HR department about the system update. If informed, they could have scheduled the test later and if it was an important test, the upgrade could have done later that night.

Result: We got change management in place.

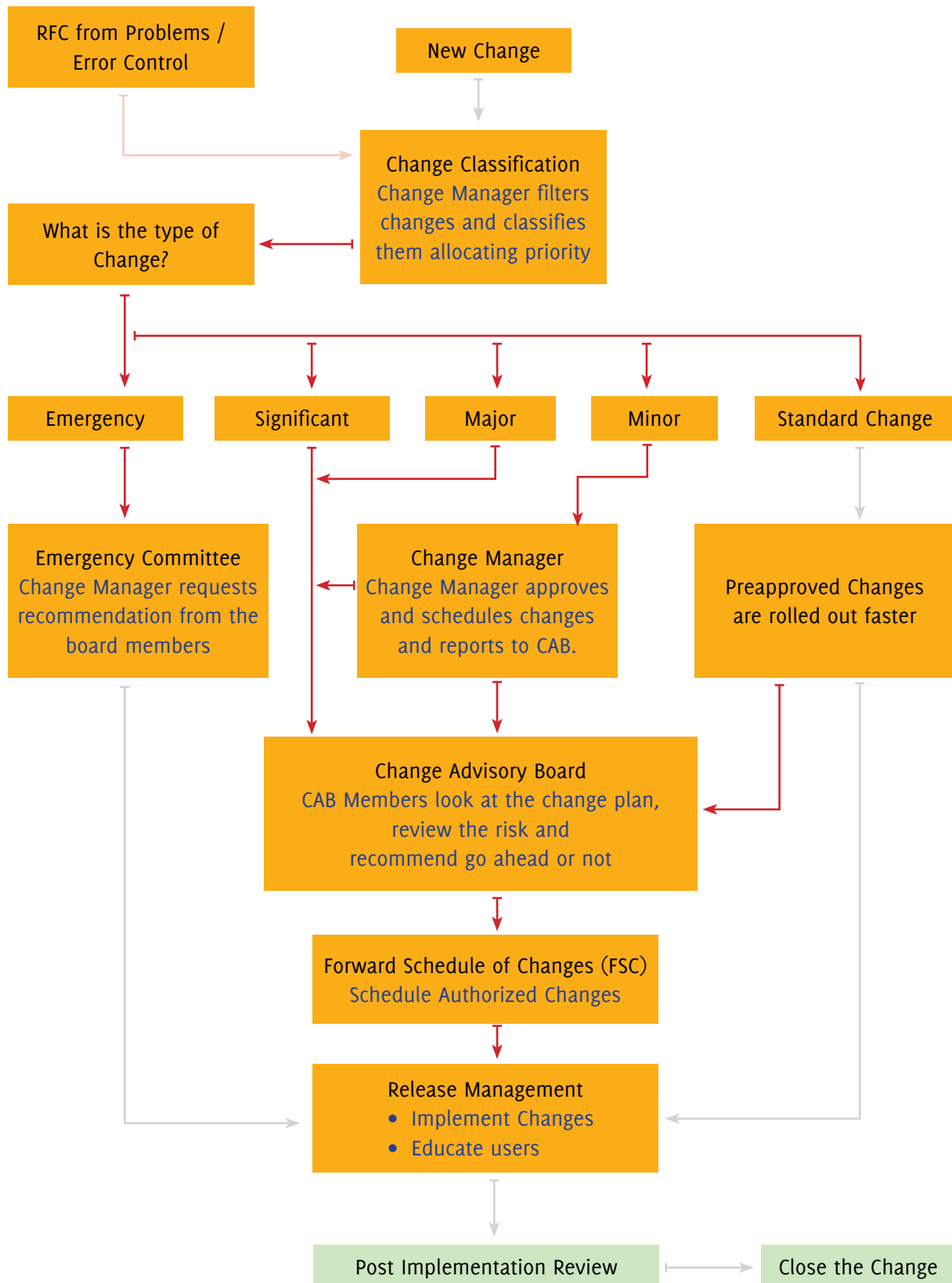
Implement a change management system without complication, with freedom you always love

Here's a simple and effective change management process that maps a common sense plan to ITIL.

Common Sense Plan	ITIL Plan
<p>Formulate a well-defined Plan</p> <ul style="list-style-type: none">• Define your proposed change• How complex is the change: major/minor/regular• How and when are you planning to roll out this change?• Will your business be affected when you are implementing this change?• If your change plans fail, will you restore the last-known good service?• Make a checklist of the things you are assuming to be available.	<p>Request for Change Change Plan should contain</p> <ul style="list-style-type: none">• Rollout Plan• Back out Plan• Assess Impact on Business• Dependency Checklist
Identify and obtain approval from stake holders who might be affected by the change	Change Advisory Board
Prioritize and schedule the change	Forward Schedule of Changes
Test the change in a sandbox and implement it	Release Management
How did the change go? Catch all the glitches. Improve your plan next time.	Post Implementation Review

For Large businesses looking at controlled Change Management with projects, I recommend you to look at <http://www.PRINCE2.com>

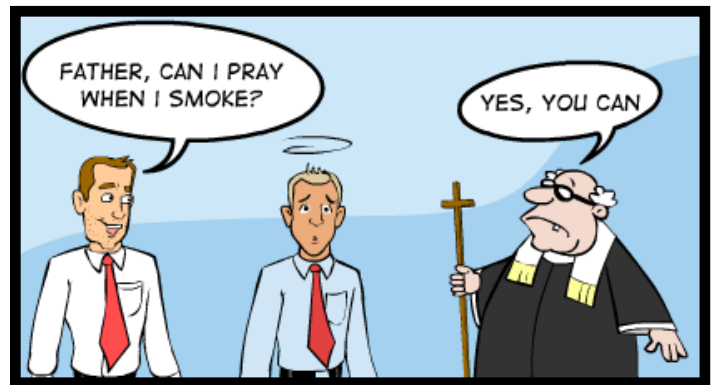
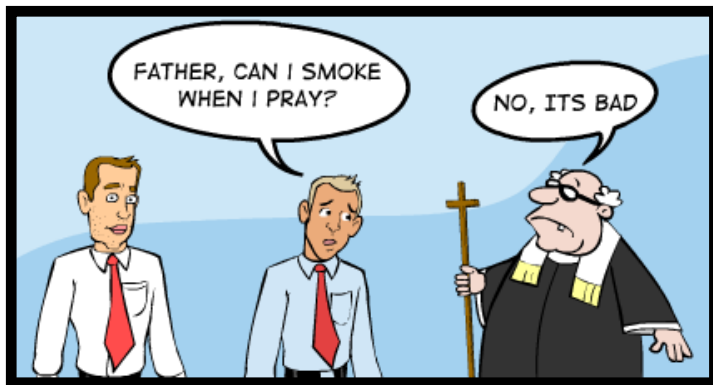
A simple workflow based on these questions will help you to design an effective change management process.



Chapter

5

Release Management



Release Management

The goal of Release Management is to plan, educate users and implement changes smoothly

Release Management works closely with Change Management. Change Management is responsible for planning and Release Management for execution/implementation.

Let's take an example from our daily lives. Whenever there is an important sewage pipe repair on a busy road, traffic cannot be stopped immediately. City officials inform commuters through news paper ads and local TV news that the road will be closed on a particular day and alternative routes are given. Commuters are able to plan things in advance so that there is no disappointment and changes are done smoothly.

That's Release Management in action.



From the perspective of IT, Release Management helps you smoothly roll out changes to your IT without any disruptions.

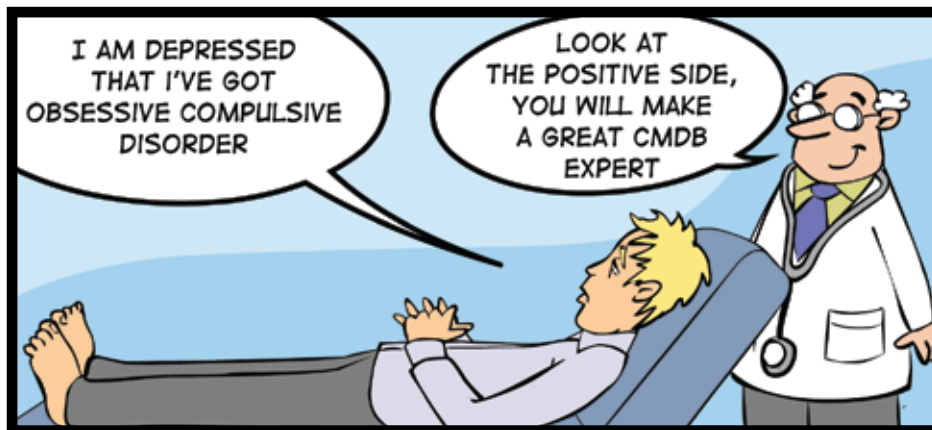
- A Release plan with information about what to deploy, how to deploy and specifications in which it will work
- The Build/change to the deployed is thoroughly tested in a sandbox condition similar to the live condition
- The baseline value configuration value before the change is recorded.
- Release and distribution as planned
- Verify and test, if the changes requested are met

Chapter

6

CMDB

(Configuration Management Database)



CMDB (Configuration Management Database)

The goal of CMDB is to build and maintain an asset database of hardware, software, associated documents and their relationships.

The main idea behind CMDB is to build an asset repository that can be uniquely identified, controlled and managed.

What will the CMDB have?

CMDB should contain information on all the critical components of the business.

- People: User name, department they belong to, location...and so on
- Assets: All assets that are part of business such as workstation, desktop, routers, printers
- Software: All paid software installed in your IT environment

The assets and components in the CMDB are known and Configured Items (CIs).

The FedEx quote is so true for CMDB

“Information about a package is as important as the package itself” - **Mike Glenn, FedEx.**

Where should I Start?

The first thing you need to implement a CMDB is a plan. Here are a few process guidelines that can help you draft a good plan.

Plan	<p>Have a clear idea of</p> <ul style="list-style-type: none">• Why you should have a CMDB• What you plan to achieve• Who will control and manage• The procedures to be followed
Identify	<p>Assets/CIs have to be uniquely identified; so, you should have a system to</p> <ul style="list-style-type: none">• Define pattern for label name• An identifier to easily locate and version number• A provision to define owners for the CIs and relationships with other CIs

Control	Maintain a controlled environment of CIs so that only CIs are added, modified or removed through a specific procedure. All your assets need not be in the CMDB; you can choose to have the ones that really matter to your business.
Asset Life Cycle Management Status	It is important to track assets throughout their life cycle. Assets can be in maintenance, in repair or in a live environment. Asset Life cycle reports can be useful for determining maintainability and dependability of the assets.
Audit and Verify	CMDB is not a one-time thing. Conduct timely audits to ensure that the CMDB reflects live environments. If you fail on a periodic update, CMDB will be only a myth.

Understand the Spirit of CMDB

Also, remember that the goal of CMDB is to build an asset repository with all the information about the assets. An asset repository can be logical and distributed. Building a CMDB does not mean trying to have everything in one big physical database.

A Definitive Software Library (DSL) is essential

With software releases every quarter and security patches every week, it is important to include the copies of software in a live environment. If one of your important servers crashes and you have the version number of the software, but not a copy of the exact same version with you, you could land yourself in big trouble.

Have a Baseline Configuration

Baseline configuration is a snapshot of CMDB. In every IT environment there are so many systems with different configurations, software, memory, processors and what not. When you have so many variables, you have to make sure that any change you make supports all versions. It is simply inviting trouble. IT managers have to plan and reduce the number of variables so that you have them under control.

You could standardize on a stable operating system and version of browser and ensure that everyone is on the optimum configuration baseline.

Eg: You can define a baseline with the following parameters to ensure that all business applications run normally

- Standard OS – Windows xp,
- RAM – 1 GB,
- Processor Intel Mobile Centrino,
- Supported Browser – IE 7

Now you can generate the list of users who meet the standards and fall below the standard and you have a program to move users below the baseline to meet the baseline so that issues and fixes can be applicable to all.

Selecting the Right ITIL Solution

Now that you have understood ITIL Service Support, it is time for you to choose the right ITIL solution that helps you to realize the value to ITIL. Never go with yesterday's leader because someone flew in to give you a fantastic sales presentation. Remember: marketing and sales presentations are bound to be impressive, and sales guys will be gone once you buy. Try to evaluate at least four or five different products from the leader to the new players. Run it in your environment, check out how easy it is to deploy, customize, and maintain. Work out how much you are going to pay and leave no room for surprises. Put it through the test of fire, in every way.

Before you make your decision, do your homework!

Let me help you take the first step forward.

Vendors	ITIL Solutions	Website
AdventNet	ManageEngine ServiceDesk Plus	http://www.servicedeskplus.com
Axios	Axios Assyst	http://www.axiossystems.com
BMC	BMC Incident and Problem Management BMC Change Management BMC Atrium (CMDB)	http://www.bmc.com
FrontRange	FrontRange ITSM	http://itsm.frontrange.com/detail.aspx?id=6018
Infra	ITIL Solutions	http://www.infra.co.uk/
Service Now	IT Service Management on demand	www.service-now.com
Symantec (formerly Altiris)	Altiris IT Lifecycle Management	http://www2.altiris.com/itil/
Numara Software	Footprints	http://www.numarasoftware.com/FootPrints.asp

Chapter

7

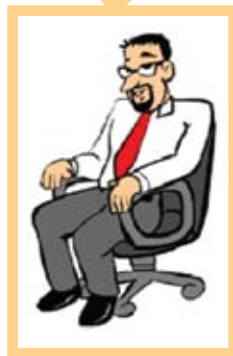
Implementing ITIL Service Support with Service Desk Plus



ITIL Processes



ServiceDesk Plus



You

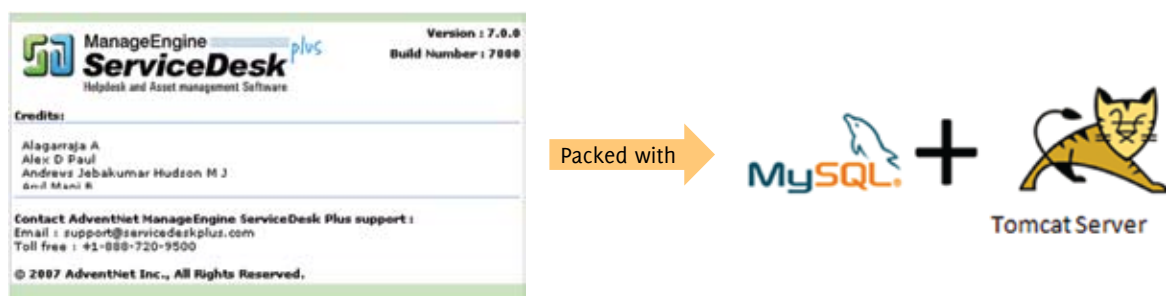
You + ITIL Processes + ServiceDesk Plus – Get It Right

ITIL Service Support and ServiceDesk Plus

ServiceDesk Plus gives you the complete ITIL Service Support Framework with Incident, Problem, Change Management, and Release Management with CMDB. You will see all the modules as soon as you install ServiceDesk Plus.

Install ServiceDesk Plus- Blindfolded

ServiceDesk Plus Installation is simple and straightforward. You can install it any Windows Server / workstation or Linux Server/ workstation. There is no web server or database configuration required. It packs a MySQL database and an Apache tomcat server that will be configured automatically when you install. Follow the installation wizard when you are click Finish, you are done.



To understand how easy it is to get started, you have to run it.

Download a 30 day trial version from the website

<http://www.servicedeskplus.com/download.html>

After you install and start your web client you will see it in action.... Tada



Let's Get It Started

To quickly help you understand how ServiceDesk Plus maps to the ITIL Service Support process, we need **Users**, **Requests** and **Assets**. Let's see how fast we can get them into the system.

1. Get your Users in

Import Users from Active Directory

ServiceDesk Plus integrates with your Active Directory helping you to connect and import users. To make the demo easier, select only one Organization Unit (OU) and import users.

Admin > Users > Active Directory



Don't have an active Directory?

If you don't have an Active Directory, it's ok, you can import users from a CSV file or key a few requestors in manually.



The screenshot shows a web interface for user management. At the top, there are three tabs: "Import from Active Directory", "Import from CSV", and "Add New Requester". Below these tabs is a row of buttons labeled with letters M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z. Underneath the letters, it says "Showing: 1 - 677 of 677" with navigation arrows and a "Show 100 per page" dropdown. At the bottom, there is a table with columns for "Department Name", "Phone", and "Job title".

Configure Email to get requests In

To make sure that you don't mess with the production system, I would recommend you to run this whole setup in a test environment.

1. Create a email account say demo in your mail server
2. To get requests in, you have to configure Mail Server Setting under the Admin tab
3. Specify the email address you just created demo@yourdomainname.com and the username.
4. Select the protocol in the Email Type

After you are done with this, send an email or ask requestors to send email, you will see that it will be fetched and converted to a request.



The screenshot shows a status bar for "Mail Server Settings". On the left is an icon of a mail server. In the center, it says "Mail Server Settings : STOPPED" in red text. On the right, there is a button labeled "Start Fetching".

Please keep in mind that when mails are fetched in ServiceDesk Plus it will be **deleted from the mail server**. You have been warned!



The screenshot shows a configuration window titled "Incoming Mail Settings". It has tabs for "Incoming", "Outgoing", and "Spam Filter". A warning message at the top states: "During mail fetching, Assetlist Manager Engine ServiceDesk Plus will delete email messages for the mail account and also it in this mail id." Below the warning, there are several fields: "Server Name / IP Address" (pop), "User Name" (alan), "Password" (password), "Email Address" (alan@servicehelp.com), "Email Type" (POP), "Port" (110), and "Fetch mails every" (1 minute). There is a "Save" button at the bottom left.

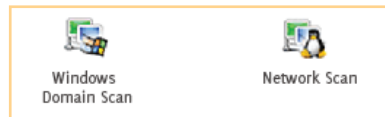
Scan and Get your Assets In

ServiceDesk Plus helps you to get all your IT and Non-IT assets in.

IT Assets: You will be able to scan

- All workstations and Servers – Windows, Linux, Apple Macs and HP Thin Clients
- Network Devices – Printers, Routers, Switches, and Access Points (and most devices that have an IP address)

Use the Windows Domain Scan to discover all windows workstations and Servers and use the Network Scan to discover Linux Servers, Linux workstations, Apple Macs and all network devices. There are no agents to be installed to scan assets. The windows scan uses WMI to connect to the workstations / Server. The Network Scan uses SSH to scan Linux and Apple Macs and SNMP for all network devices.



Domain List			
Showing 1-7 of 7 [Icons] Show 7 per page			
	Domain Name	Domain Controller	Discovery Status
Public Domains			
[Icons]	ADVENTHEIT	win2kmaster	Scanned
[Icons]	HELECESKDC	198.168.118.80	Yet to scan
[Icons]	MDKGROUP		Yet to scan
[Icons]	MSHOME		Yet to scan
Private Domains			
[Icons]	NETFLOW		Yet to scan
[Icons]	VMSBU		Yet to scan
[Icons]	WORKGROUP		Yet to scan

Network List	
Showing 1-4 of 4 [Icons] Show 4 per page	
	Network / IP Range
[Icons]	192.168.112.221 - 192.168.112.223
[Icons]	192.168.118.0
[Icons]	192.168.112.0
[Icons]	192.168.7.7 - 192.168.7.7=0

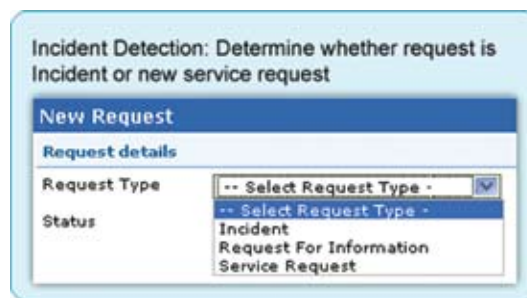
Incident Management

Incident Workflow in ServiceDesk Plus

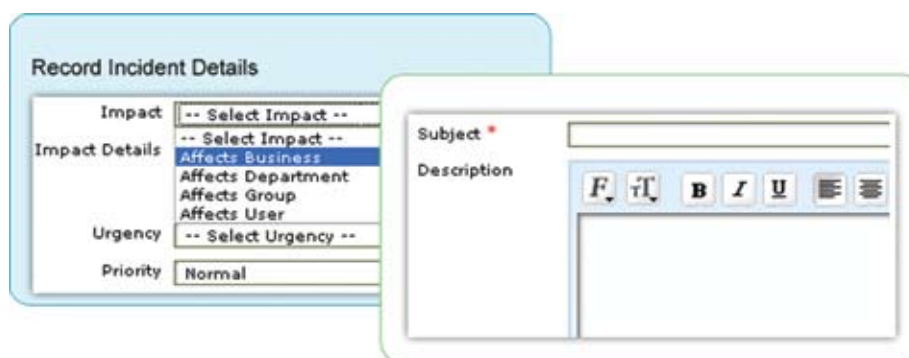
- Incident Detection
- Record the Incident details
- Classify Incident
- Provide Workaround or Solution
- Escalate / File a new problem or associate to an existing problem
- Incident Closure

Step 1: Incident Detection:

When a Request comes in, ServiceDesk Plus helps you to define the Request Type. When the Request reports about an outage or a drop in the Quality of Service, the Request is classified as an Incident. When the request requires a New Service to be setup, it is classified as a New Service Request.



Step 2: Record Incident Details



When a new Incident is detected, it is important for the helpdesk technician to qualify the incident. Helpdesk technicians can qualify the incident by asking the right questions that will help Level 2 technicians to resolve the Problem faster. ServiceDesk Plus helps you record all the incident details.

Define Priority Matrix

The Priority Matrix helps you determine the right priority based on the given values of Business Impact and Urgency. Helpdesk Managers can configure this one time and ServiceDesk Plus will assign the right priority, this is one of the ITIL Incident Management best practices. However it is designed to be flexible enough for you to ignore the Priority Matrix and allow technicians and users to define priority (I wouldn't recommend that)

Admin > Helpdesk Customizer > Priority Matrix

Impact:	High	Low	Normal	Urgent
Affects Business	High	Low	Medium	High
Affects Department	High	Low	Select Priority	Select Priority
Affects Group	High	Medium	Normal	High
Affects User	Medium	Normal	Medium	High

☒ Allow Requesters and Technicians to override the Priority Matrix
This will allow requesters and technicians to define their priority for the request ignoring the global Priority matrix values.

Step 3: Classify the Incident

Helpdesk technicians can classify the incident while creating a new Incident or update **Category > Sub Category > Item** in an incident raised by the user. Incident classification is very important to understand the source of all your incidents.

Classify the Incident

Category Details

Category: Software

Sub Category: Adobe

Item: Photoshop 7

Step 4: Provide Workaround or Solution

Helpdesk Technicians can search for existing workarounds or solution from the request and get back to users immediately.

Provide Work Around or Solution

Unable to open image file
Request ID : 1
Status : Open
Priority : High

Request Resolution History

Time Elapsed

Technician	Description	Executed Time	Time Elapsed	Charges (\$)
Heather Graham		31 Jul 2007, 15:21:26	0 Hrs 20 Mins	0.00
Total :			0 Hrs 20 Mins	\$ 0.00

Search Solutions
Resolution submitted by : administrator
Submitted on : 31 Jul 2007, 04:19:32

Hi,
Photoshop 7 could be slow due to the following reasons
More than 6 large image files open at the same time
Mays - 3 D rendering Software Applications was also active at the same time
Can you try closing a few open files or close the Mays as it consumes most of CPU time and RAM space.
Lex

Step 5: File a new problem or associate to an existing problem

Helpdesk technicians to group similar incidents together that point to the same **Category > Sub Category > Item** and file a new problem or associate to an existing problem . Once a Problem is created Level 2 technicians or problem technicians take control.

The screenshot displays two parts of the ServiceDesk Plus interface. The top part shows a 'Problem' view for 'Problem ID : 2' with the title 'no network is available in the system'. It includes tabs for 'Problem', 'Analysis', 'Solution', 'Tasks (6)', 'Incidents (2)', and 'History'. Below these is a table of incidents:

Subject	Requester Name	Assigned To	Due By	Status	Created Date
test for resolved2	nima	Administrator	-	Open	Oct 1, 2007
printer not working	akarthik	Jennifer Doe	Sep 27, 2007	Open	Sep 27, 2007

The bottom part shows a 'Request' view for 'Request ID : 433' with the title 'Undelivered Mail Returned to Sender'. It includes tabs for 'Request', 'Resolution', and 'History'. The 'Requester' is 'mailer-daemon' and the 'Subject' is 'Undelivered Mail Returned to Sender'. The 'Description' states: 'This message was created automatically by mail delivery software. A message that you sent could not be delivered to one or more of its recipients. This is a permanent error.'

Step 6: Incident Closure

An incident must be closed only when the user confirms that the solution has helped the user. Helpdesk technicians need to be the Single Point of Contact and keep users informed, tracking the status and making sure that all incidents are responded to and closed. It is really a painful process to make sure that all users to confirm on incident closure.

Create and Educate users about your closure policies

You can define that helpdesk will resolve issues and get back to you. Users must confirm if the Incident has been resolved if users don't respond within 10 days. We'll assume that you agree on the incident closure.

ServiceDesk Plus helps you with Incident Closure

Your Helpdesk Technicians can resolve incidents and change the status of the request to resolved state. ServiceDesk Plus will send an email to the requester asking if the resolution helped. If the users do not respond within 10 days the request will be automatically closed.

The screenshot shows the 'Request Closing Process' configuration window. It has two radio buttons: 'Manual Close' and 'Automated Close', with 'Automated Close' selected. Below this, it says 'Close resolved requests after 10 days'. There is a section titled 'In Automatic Mode' with a list of bullet points:

- In Automatic Mode **Resolved** state
- The Requester can Close the Request with the close link gi
- If the Requester takes no action the Request will be close

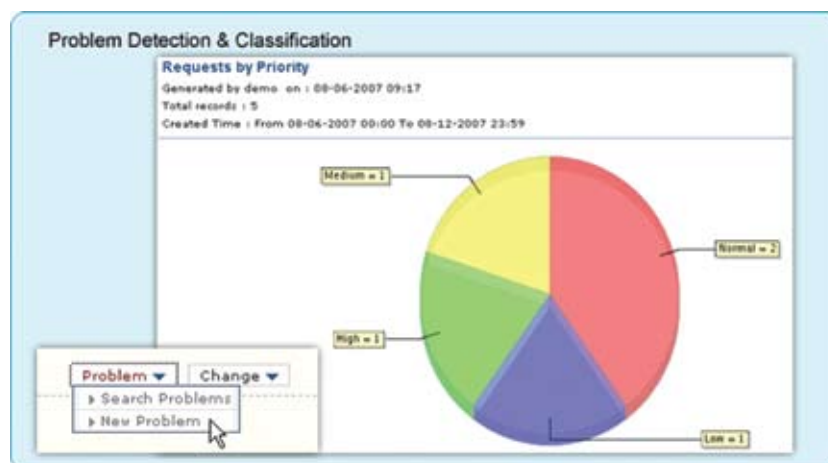
At the bottom, there is a 'Save' button.

Problem Management Workflow in ServiceDesk Plus:

- Problem Detection & Classification
- Problem Priority
- Problem Analysis
- Solutions, Work Around, and Known error record
- Problem Closure

Step 1: Problem Detection & Classification

Problem Technicians can look into source of all the incidents based on the classification in the (Category > Sub Category > Item). Reports about top 10 repeated incidents in a category gives a clear picture on what needs to be fixed first.



Step 2: Problem Priority

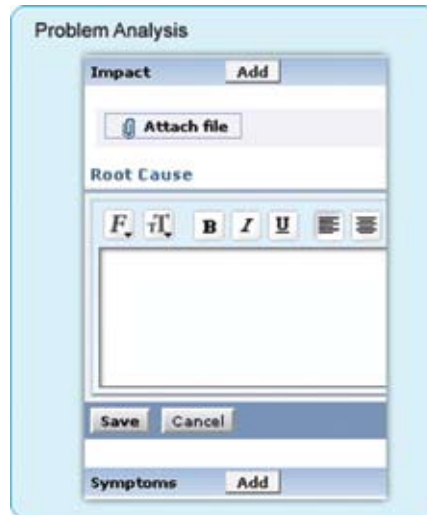
The figure shows a 'Problem Priority' form with three dropdown menus. The 'Impact' field is set to 'Affects Business', the 'Urgency' field is set to 'High', and the 'Priority' field is set to 'High'.

Field	Value
Impact	Affects Business
Urgency	High
Priority	High

Depending on the Urgency and Impact level of the problem, the priority can be set for the problem. This prioritization will help the technician to assess the various problems and take necessary action, focusing on the critical problems first.

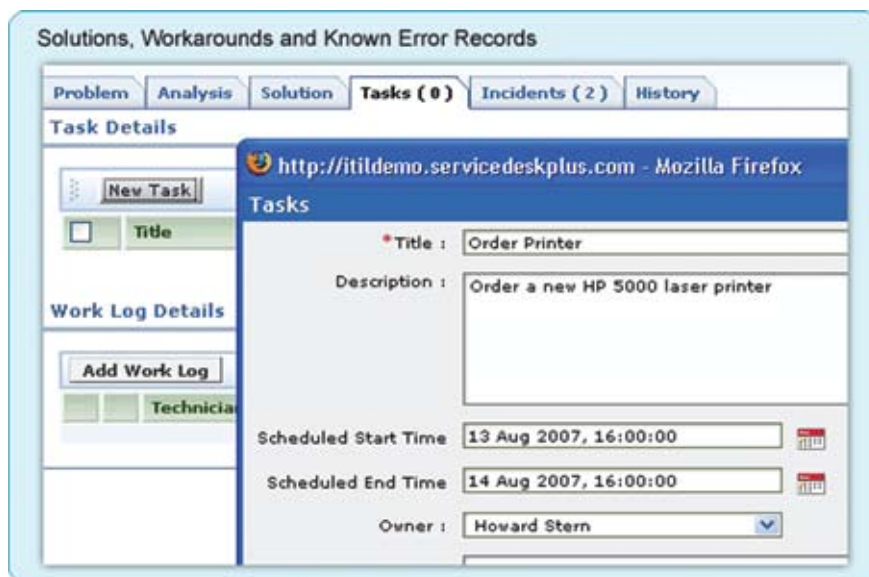
Step 3: Problem Analysis

The technician can analyze the root cause and impact of the problem and attach the same in SDP as part of the problem. This helps in giving a one stop understanding of what may be cause of the problem and solution or work-around that can be given.



The screenshot shows the 'Problem Analysis' form. It has a title bar 'Problem Analysis'. Below it, there's an 'Impact' section with an 'Add' button and an 'Attach file' button. Below that is a 'Root Cause' section with a rich text editor containing formatting icons (Bold, Italic, Underline, etc.) and a large text area. At the bottom, there are 'Save' and 'Cancel' buttons, and a 'Symptoms' section with an 'Add' button.

Step 4: Solutions, Workarounds and Known Error Records



The screenshot shows the 'Solutions, Workarounds and Known Error Records' interface. It has a tabbed interface with tabs for 'Problem', 'Analysis', 'Solution', 'Tasks (0)', 'Incidents (2)', and 'History'. The 'Tasks (0)' tab is selected. On the left, there's a 'Task Details' section with a 'New Task' button and a 'Title' field. Below that is a 'Work Log Details' section with an 'Add Work Log' button and a 'Technician' dropdown. The main area shows a task titled 'Order Printer' with a description 'Order a new HP 5000 laser printer'. It also shows 'Scheduled Start Time' as '13 Aug 2007, 16:00:00', 'Scheduled End Time' as '14 Aug 2007, 16:00:00', and 'Owner' as 'Howard Stern'.

Solutions are permanent fixes to the problems raised. Workarounds are temporary solutions that can be used by the technician till actual solution is ready. Optionally, you can also add Tasks that need to be done to clear the Incident.

Step 5: Problem Closure

Technicians rush to close the problem, but managers need clear reports to analyze patterns of the problem. The problem closure rules allow technicians to close the problem only if they provide all the mandatory fields. You can set rules for problem closure in Admin > Problem/Change Management > Problem Closure Rules. Only if the mandatory fields are completed can the problem be closed.

The screenshot displays a 'Problem Closure' window. At the top, it says 'Mandatory fields for Closing Problem'. Below this, there is a table of fields with checkboxes indicating if they are mandatory. The fields are: Category (checked), Sub Category (checked), Item (checked), Solution (unchecked), Root Cause (checked), Urgency (unchecked), Priority (unchecked), Impact (unchecked), IT Services (unchecked), Asset (unchecked), Associa (unchecked), and sdgfafg (unchecked). A 'Save' button is at the bottom left. An 'Actions' dropdown menu is open, showing options: Assign Technician, Close Problem (highlighted), Delete, Associate Incidents, View Change, Detach From Change, View Reminder(s), Others, Make an announcement, and Send Notification.

Field	Mandatory
Category	Yes
Sub Category	Yes
Item	Yes
Solution	No
Root Cause	Yes
Urgency	No
Priority	No
Impact	No
IT Services	No
Asset	No
Associa	No
sdgfafg	No

Change Management Workflow

- Initiate Change Request
- Change Plans and CAB (Change Advisory Board)
- Approval from CAB Members
- Co-ordinate Change Implementation
- Post Implementation Review
- Change History

Initiate Change Request

You can initiate **New Change Request** or initiate a change from one or more Problems. The Request for Change is considered based on the Business Impact, Urgency and Priority. The Change plan is formulated to get started with a the change process

The Change Plan needs to have complete details about the reasons for considering the change, how this change can impact business. The **Change Planning** stage needs to have following information so that Change Managers and CAB have all the detailed to make informed decisions.

- Impact Analysis - risk involved in implementing the change
- Rollout Plan - how the plan will be implemented
- Back out Plan - plan to restore things to back to original state if plan fails
- Checklist - List of mandatory items required for the plan to succeed

Change Plans and CAB (Change Advisory Board)

- ServiceDesk Plus offers 4 different types of built-in Change Plans.
- Standard Change
- Minor Change
- Major Change
- Significant Change

ServiceDesk Plus allows you to define and configure your own Change Types with color codes to denote severity.

Standard Change

Standard Changes are pre-approved changes authorized by the Change Manager based on Management policies. Frequent changes such as permitted RAM upgrade to users or list of allowed software applications can be pre-approved by the Change Manager so that changes are fulfilled faster.

Minor Change

A Minor change is defined as a change that has low impact on business and does not consume lot of resources. The Change Manager approves the Minor Changes.

Major and Significant Changes

Major and Significant Changes need the approvals from all the members of the Change Advisory Board and the Change Manager. The members of the CAB (Change Advisory Board) are determined based on stakeholders who will be affected by the change. Based on the change plans and risk involved the CAB members will vote and recommend to Accept or Decline a change plan.



Major and Significant Changes

ConfigurationWizard

Helpdesk - Change type

ChangeType List [New]

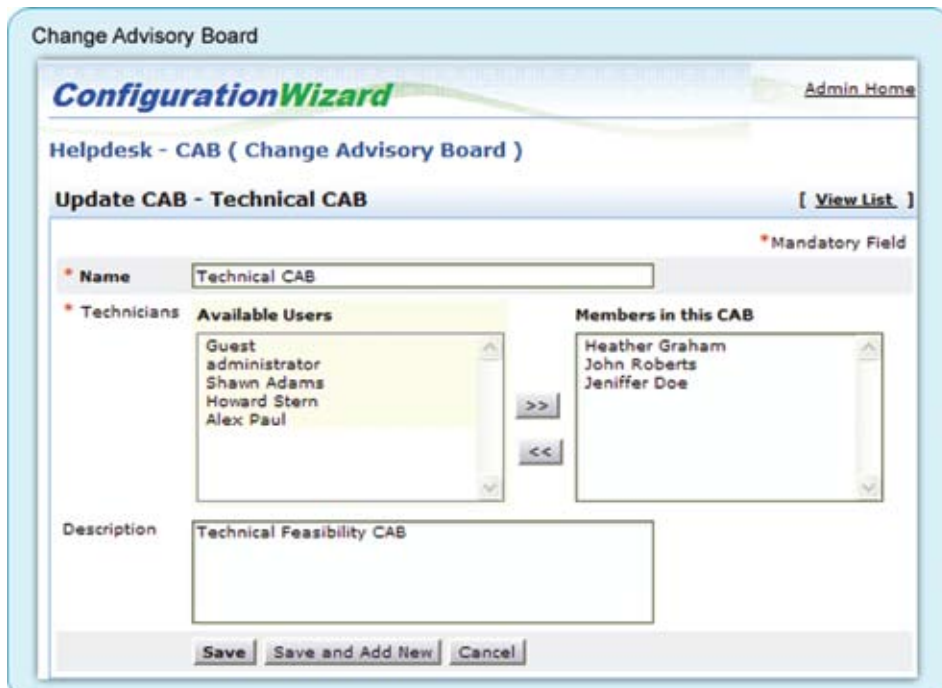
Delete Showing : 1 - 4 of 4 | Show 25

Note : Inactive record(s) have been marked in grey colour. Edit option can be used to activate the record.

<input type="checkbox"/>	Name	Description	Color
<input type="checkbox"/>	Standard	Routine, low-impact changes that do not require a formal approval	Green
<input type="checkbox"/>	Major	High impact and /or Resource requirements usually approved after	Red
<input type="checkbox"/>	Significant	Routine, low-impact changes that do not require a formal approval.	Yellow
<input type="checkbox"/>	Minor	Minor impact and Resource requirements usually approved by a Ch	Yellow

Change Advisory Board

ServiceDesk Plus enables you to create CABs. Based on the defined change type, you can choose to send the change plan for approval to CAB members. You can create different CABs such as Emergency CAB, Technical CAB and so on.



Change Advisory Board

ConfigurationWizard Admin Home

Helpdesk - CAB (Change Advisory Board)

Update CAB - Technical CAB [View List]

*Mandatory Field

* Name Technical CAB

* Technicians

Available Users

- Guest administrator
- Shawn Adams
- Howard Stern
- Alex Paul

Members in this CAB

- Heather Graham
- John Roberts
- Jeniffer Doe

Description Technical Feasibility CAB

Save Save and Add New Cancel

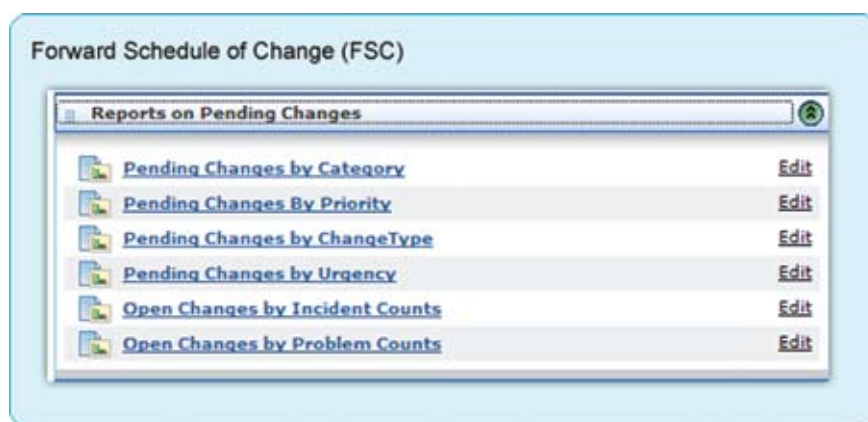
Approval from CAB Members

The CAB Members meet once in two weeks or once in a month to discuss the changes that are submitted for approval. Based on the change plan and the risk analysis, the CAB Members take a unanimous decision to **Accept or Reject** a Change Plan.

Co-ordinate Change Implementation

- Forward Schedule of Change (FSC)

All Approved Changes have to be implemented with minimal service downtime. ServiceDesk Plus gives you built-in reports based on Priority, Urgency, by Incident, and Problem counts that helps Change Managers to prioritize and schedule changes.



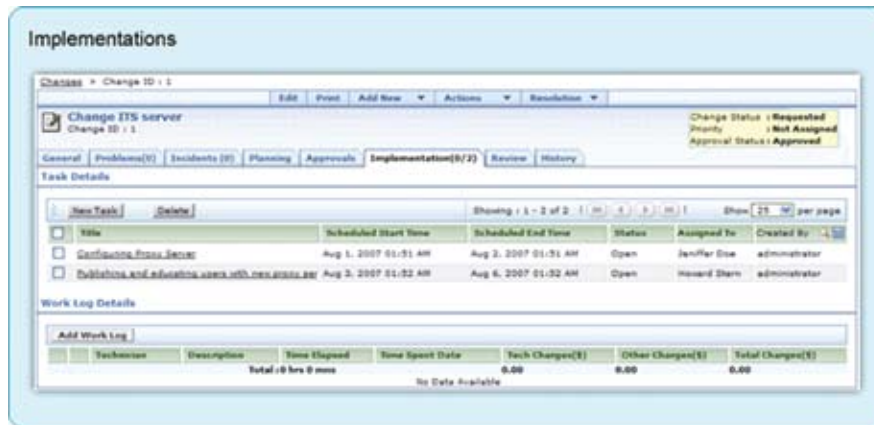
Change Calendar

Based on the changes considered for the next implementation, the changes are scheduled and published. The Change Calendar keeps everyone informed when a particular service will be down for maintenance and when it will be restored.



Implementations

ServiceDesk Plus helps you keep track of important tasks involved in implementing an approved change. The Change Request can be broken down into multiple tasks with different owners. The Change Manager can delegate tasks to technicians, schedule and track status of the task completion. Tasks give Change Managers more fine-grained control while implementing a change.



Post Implementation Review

The Post Implementation Review helps Change Manager to keep track of the rolled out change to

- Capture the glitches that happened during the change
- Track KPI to measure the effectiveness of the change

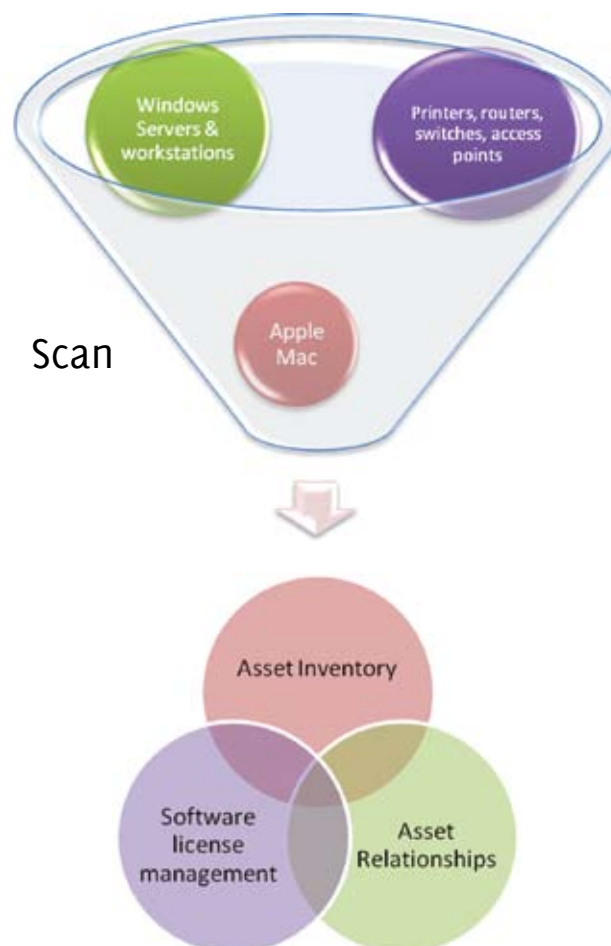


Keep Track of the Change History:

As Change Management involves key business, it is important to maintain clear documentation about the change. ServiceDesk Plus keeps track of the complete change History. This helps to audit changes and get all the information such as, when the change plan was edited, when it was approved, who approved it and what time. The Property View helps you keep a record of all changes for auditing purposes.



Configuration Management Database (CMDB)



Discover Assets:

Plus helps you discover all your IT assets such as workstations(windows, Linux and apple Mac), printers, routers, switches, and access points and get all the asset and asset details in one place. ServiceDesk Plus helps you assign asset id and asset name to uniquely identify assets.

Summary:

ITIL was meant for businesses of all sizes small, medium, and large. Today, ITIL is not given a fair chance in SMB market place, mostly dismissed for being complicated and expensive. The ITIL Heroes Handbook is an initiative that hopes to change the general perspective and help IT Managers and staff to understand ITIL in the right Spirit.

The whitepaper presents a practical approach to ITIL. Get started with practical ITIL processes and workflows that worked for most business worldwide. Implement an ITIL solution in a day; you have to try it to believe it.

www.ManageEngine.com

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[8 a.m to 5 p.m]