Fermilab Service Provider Training

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Training Curriculum

- End User Training: How navigate the updated service desk, submit requests for service, and report outages.
- Incident management: Break/Fix activity. How to manage and resolve tickets that reflect an outage or a degradation of service.
- Request management: How to navigate the service catalog, manage and fulfill tickets that reflect a request for service.
- Change management: How to record and plan changes to production.
- Configuration and Event management: How query and view CIs, designate CIs as “pageable”, build and assign on-call rotation schedules, and update categorization of CIs within the CMDB.
- Reporting: How to access reports and queries, and build reports for specific requirements.

Today's Agenda

What's being covered in this training

- Navigating the tool
  - My Self Service
  - My Work, My Group's Work
  - Ticket Initiation and Notifications
- How to "work a ticket" in Incident management
  - Assign Ticket
  - Update Ticket Status
  - Resolving a Ticket
- How to relate Tickets and CIs (related Lists)
  - How to relate a CI to an Incident
  - How to relate to relate other tickets (Change, Problem, Requests, etc.)
  - How to relate tasks
  - How to CREATE tickets from an Incident (Change, Problem, Requests, etc.)
- How to manage email collaboration & watch lists
  - Watch List
  - Email Collaboration and Updates
  - Notifications

What's <u>not</u> being covered

- Request management (this will be covered for each specific support group)
- Event management, on-call Rota & paging
- Reporting
- Data migration & go-live coordination

A Note About Requests

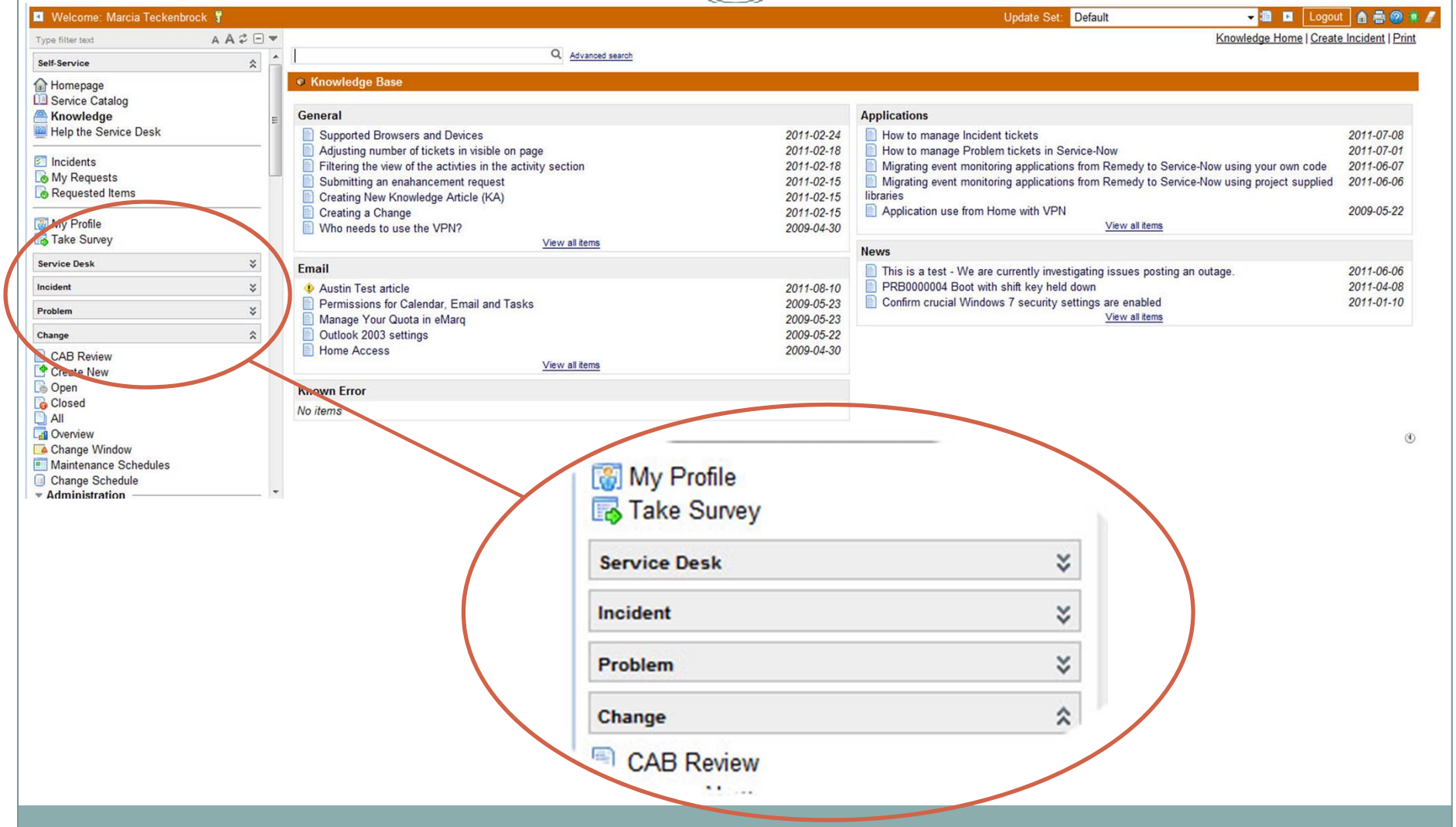
An Incident is a record and response to restore or fix something.
A Request is a record and response to provide a service or item, such as a laptop, a computer account, or information.

Requests have different identifiers than Incidents (REQ vs. INC).

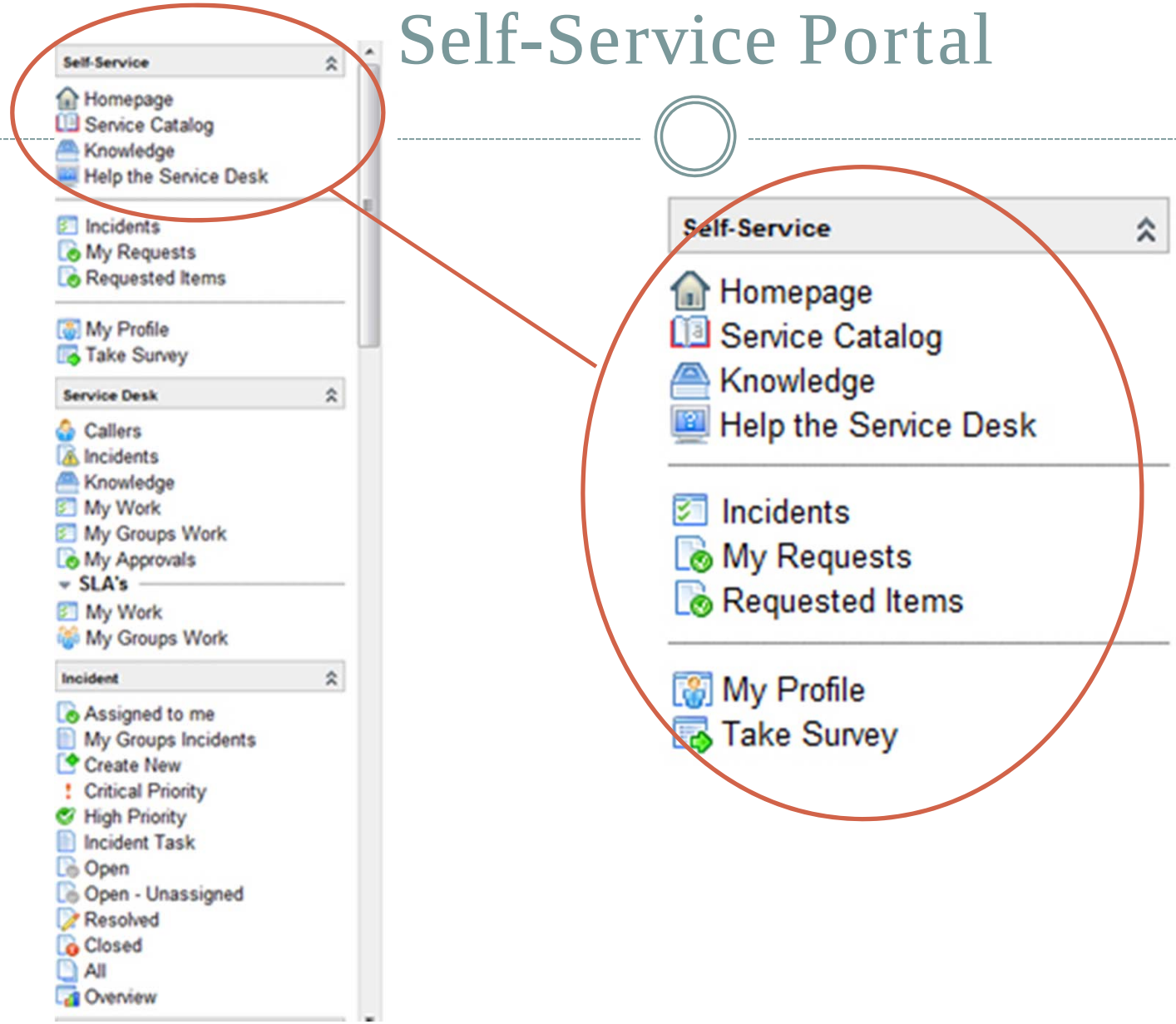
Requests are ordered through the Service Catalog.

There will be shorter training sessions specific to Service Groups on Request Management.

Navigating the Tool

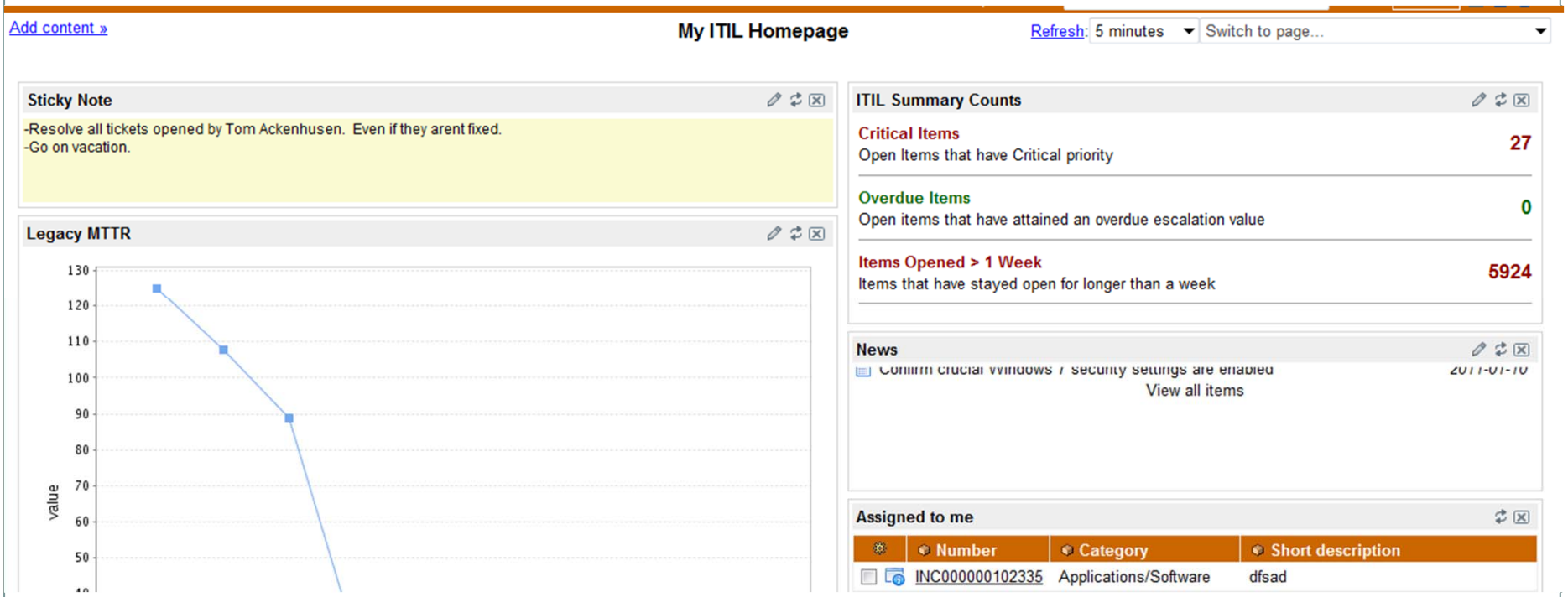


Self-Service Portal



Self-Service Portal, cont'd

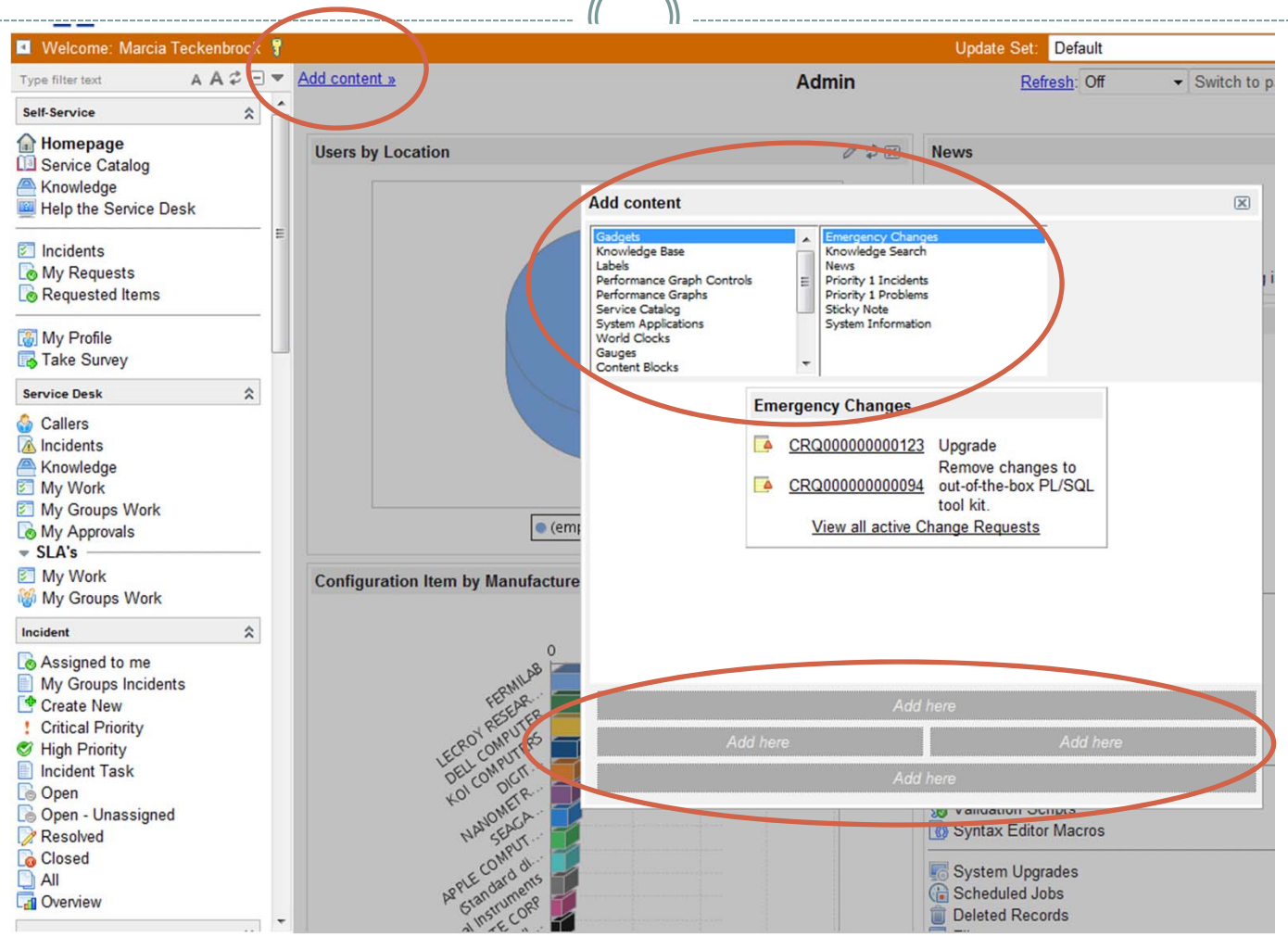
We'll provide a standard home page that will look something like this.



Self-Service Portal, cont'd

You can also customize a version for your needs. This will become your default view. It is easy to switch back and forth between the standard and customized views.

Customizing Your Portal



Customizing Your Portal, cont'd

YOUR Sticky Notes Module

YOUR Pending Approvals

Sticky Note

-Resolve all tickets opened by Tom Ackenhusen. Even if they arent fixed.
-Plan a vacation....immediately.

My Groups Work

Number	Short description	Opened by	Assigned to
RITM0010371	General Request	Brian Mckittrick	
RITM0010370	Additional Kerberos Items	Heather Kumlin	
RITM0010369	Additional Kerberos Items	Heather Kumlin	
RITM0010368	Additional Kerberos Items	Heather Kumlin	
RITM0010367	Additional Kerberos Items	Heather Kumlin	
RITM0010366	Additional Kerberos Items	Heather Kumlin	
RITM0010364	Additional Kerberos Items	Heather Kumlin	
RITM0010363	Additional Kerberos Items	Heather Kumlin	
RITM0010360	Additional Kerberos Items	Heather Kumlin	
RITM0010357	Hardware Service Request	Krysta Jacobs	Jack Schmidt
RITM0010356	asdf asdf	Jeff Pierce	
RITM0010355	short	Jeff Pierce	
RITM0010354	short	Jeff Pierce	
RITM0010353	short	Jeff Pierce	
RITM0010352	Request New Office Space	Jeff Pierce	
RITM0010351	Proprietary Property Request	Jeff Pierce	
RITM0010350		Jeff Pierce	
RITM0010349	Additional Kerberos Items	Heather Kumlin	
RITM0010348	Cryptocard Request	Heather Kumlin	
RITM0010347	Additional Kerberos Items	Heather Kumlin	

Actions on selected rows... 1 to 20 of 2019

My Pending Approvals

State	Approver	Comments	Approval for	Created
Requested	Thomas Bozonelos		CRQ000000000112	2011-02-10 16:40:10
Requested	Thomas Bozonelos		CRQ000000000303	2011-02-10 16:40:31
Requested	Thomas Bozonelos		CRQ000000000110	2011-02-10 16:40:57
Requested	Thomas Bozonelos		CRQ000000000079	2011-02-10 16:41:00
Requested	Thomas Bozonelos		CRQ000000000742	2011-02-10 16:41:21
Requested	Thomas Bozonelos		CHG0030093	2011-02-11 09:37:05
Requested	Thomas Bozonelos		CHG0030099	2011-02-17 10:15:10

Actions on selected rows... 1 to 7 of 7

My work

Number	Short description	Opened by	Assigned to
INC000000102704	adfasdf	austin buono	Thomas Bozonelos
INC000000102694	dsfasd	austin buono	Thomas Bozonelos
INC000000102689	dafads asdf asdf asdf	austin buono	Thomas Bozonelos
INC000000102686	test	Tyrone Killebrew	Thomas Bozonelos
INC000000102681	tesgasdfa sd fa sdf a sdf	austin buono	Thomas Bozonelos
INC000000102677	Outage on application beginning at 2011-07-21 16:28:56	Alicia Simmons	Thomas Bozonelos
INC000000102676	Unable to access Leave Usage	Alicia Simmons	Thomas Bozonelos
INC000000102675	I would like to request SharePoint Permissions to xyz site	Alicia Simmons	Thomas Bozonelos
INC000000102674	Request for MM Proxy to CD 117	Alicia Simmons	Thomas Bozonelos
INC000000102584	dont have any rules	austin buono	Thomas Bozonelos
INC000000101876	a	Brian Mckittrick	Thomas Bozonelos
INC000000101852	Can't print	Thomas Bozonelos	Thomas Bozonelos
INC000000101847	Need a monitor	Brian Mckittrick	Thomas Bozonelos
INC000000064731	Hardware Loan Request :Jack Schmidt	Jason Ormes	Thomas Bozonelos
INC000000063146	Hardware Loan Request :Laurie Pederson	Laurie Pederson	Thomas Bozonelos
CHG0030099	This is an example of a short description for a Major Change	Michael Kaiser	Thomas Bozonelos

Actions on selected rows... 1 to 16 of 16

YOUR open Incidents,* Requests, Changes, Problems

* Incidents are still "active" until they are in closed status (after ~24 hours)

Working an Incident Ticket

You will receive a notification when an Incident is assigned to your group (or directly to you).

Incident INC000000102503 has been assigned to you

owner-sn-poc@listserv.fnal.gov on behalf of Service-Now Service Desk

Sent: Wed 8/17/2011 7:31 AM

To: sn-poc@fnal.gov

Short Description: Testing the email collaboration
Click here to view incident: LINK

Severity: 3 - Low
Priority: 3 - Medium
Category: General
Comments:

Ref:MSG0052951

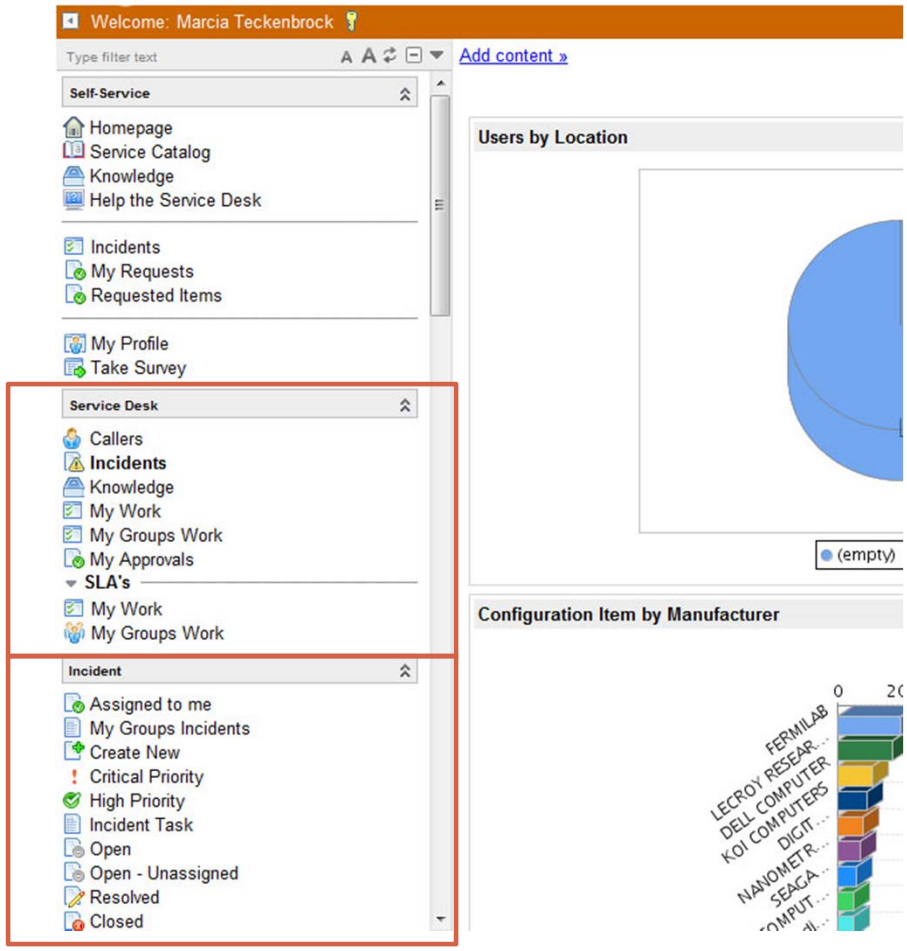
Click the link to view Incident ticket.

Working an Incident Ticket, cont'd

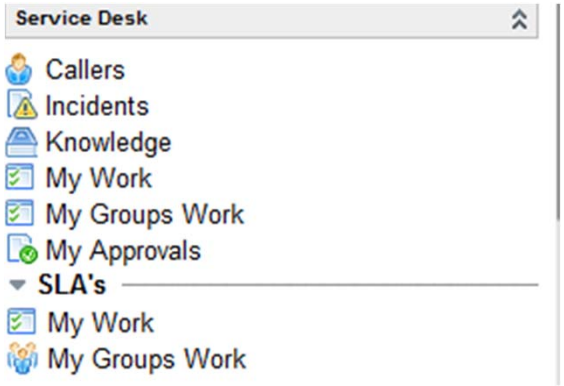
Service Desk view after login

Service Desk module

Incident module



Working an Incident Ticket, cont'd



Service Desk Module – From this entry point, the following views are available:

Callers: Shows list of caller records. Callers are people that can have a ticket opened under their name (= Remedy Requestors).
Incidents: All active incidents.
Knowledge: Entry point to the knowledge base.
My Work: All incidents, changes, requests and problems assigned to you.
My Groups Work: All active incidents, changes, requests and problems assigned to your support group(s).
My Approvals: Approvals that have been assigned to you, the states they are in and task each approval is associated with.
SLAs – My Work: Recommended work order (based on SLAs) for your tickets; designed to be worked from top down.
SLAs – My Groups Work: Recommended work order (based on SLAs) for the tickets assigned to your group; designed to be worked from the top down.

Viewing an Incident

Click on an Incident link to open it.

Welcome: Marcia Teckenbrock

Update Set: Default

Type filter text

- Callers
- Incidents
- Knowledge
- My Work
- My Groups Work
- My Approvals

SLA's

- My Work
- My Groups Work

Incident

- Assigned to me
- My Groups Incidents
- Create New
- Critical Priority
- High Priority
- Incident Task
- Open
- Open - Unassigned
- Resolved

Incidents | New | Go to Number

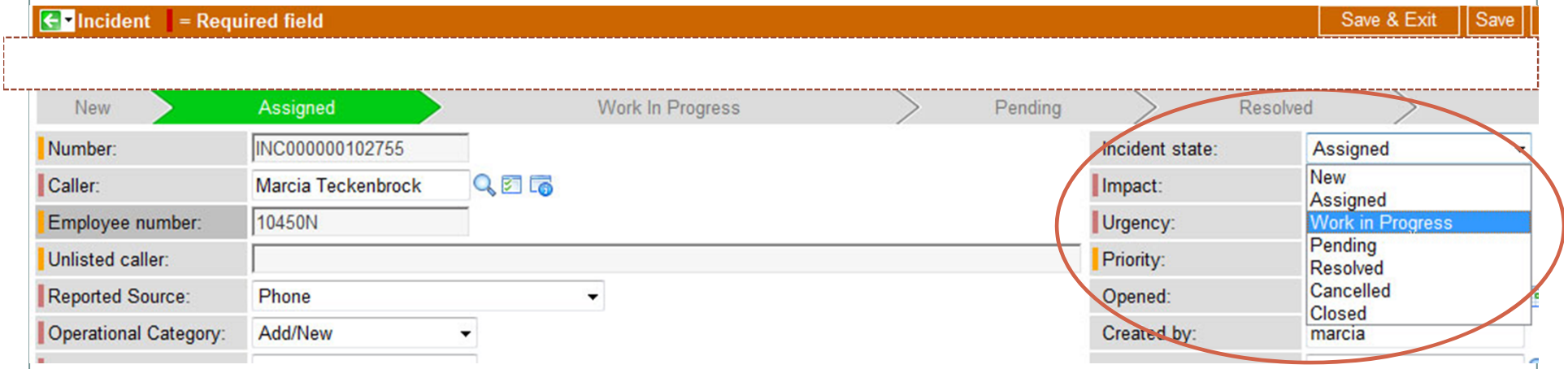
All > Active = true

Number	Assigned to	Opened	Short description
INC000000057462		2010-10-18 09:36:00	Item not available in Remedy for CI
INC000000057480	Patrick Gartung	2010-10-18 10:19:00	User is trying to log into cmslpc cluster and gets err
INC000000057508		2010-10-18 11:55:00	Item not available in Remedy for CI
INC000000058221	Nino Strothman	2010-10-22 10:35:00	Transfer license from one computer to another
INC000000058800	Jeffrey Meisner	2010-10-27 13:43:00	battery for Thinkpad laptop
INC000000058886		2010-10-28 09:56:00	Hardware Service Request :jpsi1111/1112
INC000000059019	John Diamond	2010-10-29 08:37:00	User uhas problems connecting via Humming Bird
INC000000059020	Michael Kriss	2010-10-29 08:42:00	Unable to run Java update
INC000000059276	Keith Coiley	2010-11-02 08:25:00	Reorganizing the WH9W office now the student has
INC000000059653	Tyrone Killebrew	2010-11-04 11:22:00	Hardware Service Request
INC000000059705		2010-11-04 14:31:00	Hardware Service Request :DOCS926
INC000000059771	Tyrone Killebrew	2010-11-05 10:36:00	Hardware Service Request
INC000000060009	Charles Andrews	2010-11-08 14:48:00	INC000000057969 - Confirmation New Incident recei

Moving an Incident into Work in Progress

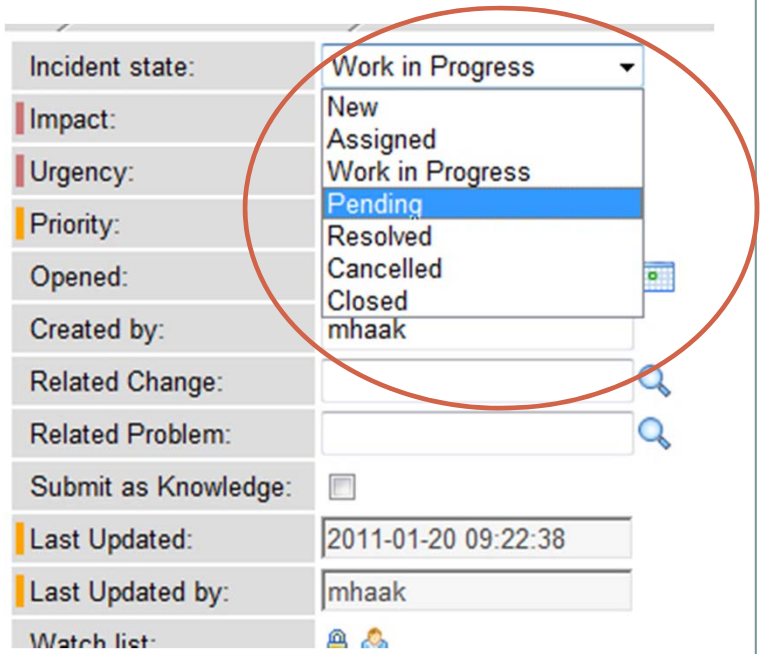
It is a requirement that Incidents are in “Work in Progress” before moving into a “Resolved” state in order to calculate the Mean Time to respond (MTTr).

1. Change Incident State to “Work in Progress.”
2. Click **Save** or **Save & Exit**.



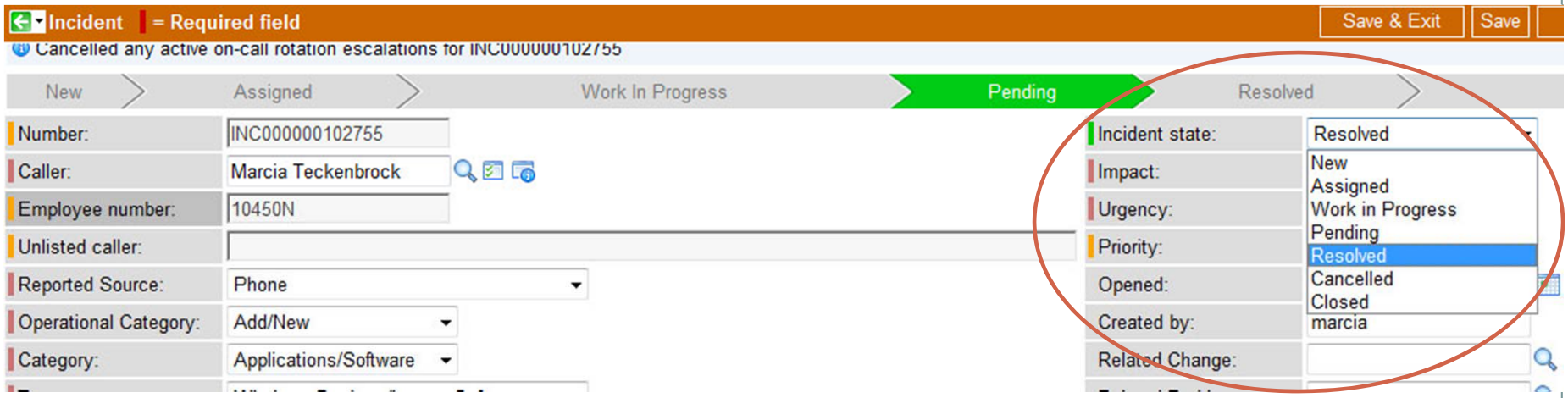
Moving an Incident into Pending state

1. Change Incident State to “Pending.”
2. Update ‘Additional comments’ with pending reason.
3. Click **Save** or **Save & Exit**.



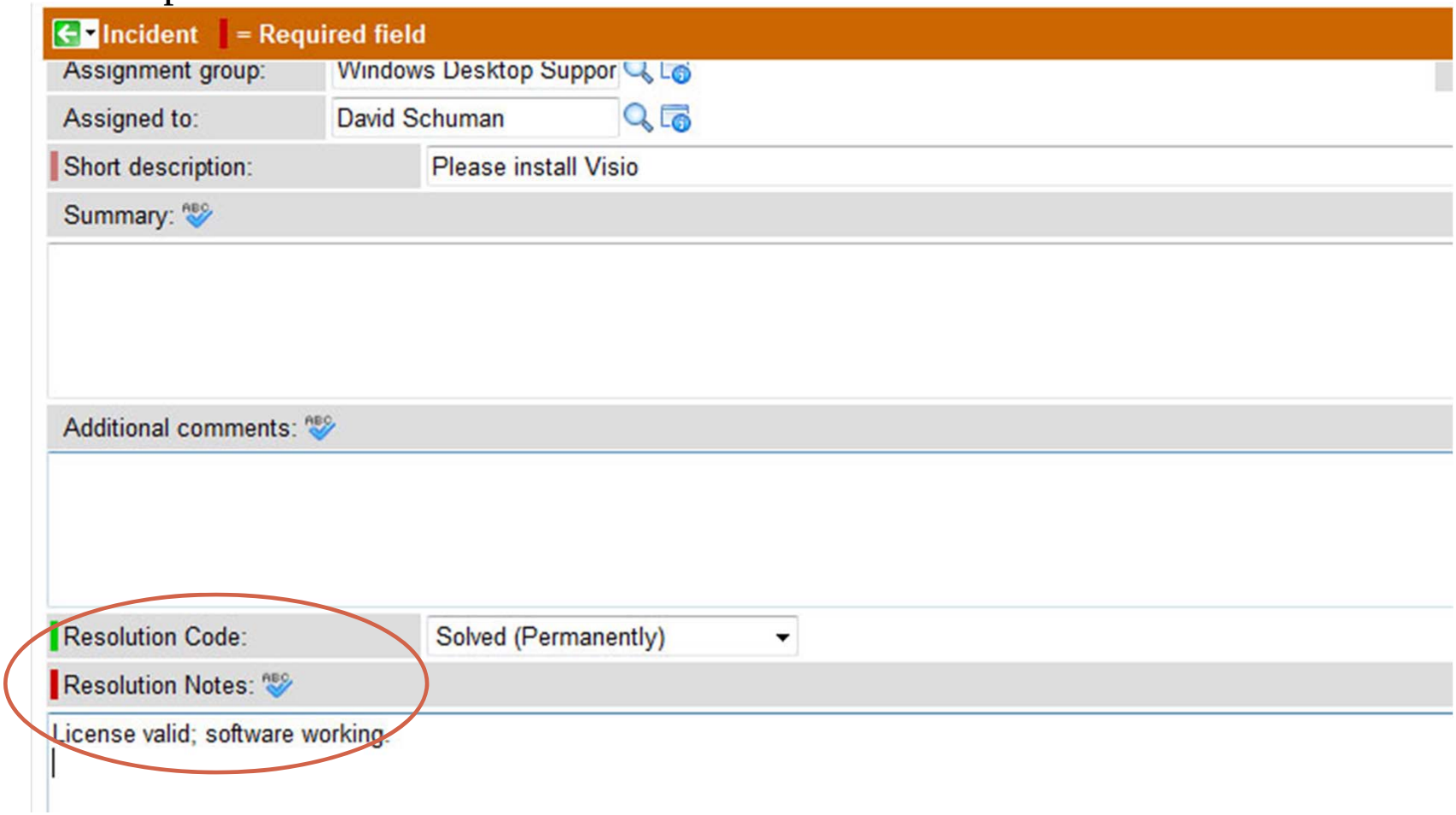
Moving an Incident into Resolved state

1. Change Incident State to “Resolved.”



Moving an Incident into Resolved state, cont'd

2. Complete **Resolution Code** and **Resolution Notes** fields.



3. Click **Save** or **Save & Exit**.

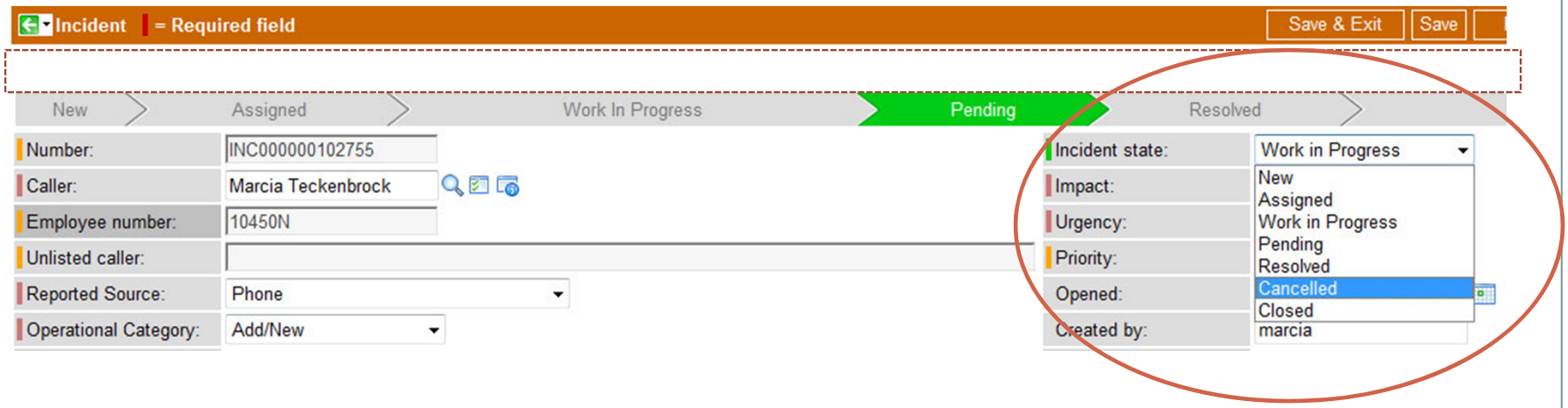
Moving an Incident into a Closed state

Tickets will automatically move to closed state 24 hours after being resolved. There is never a need to manually move an incident to Closed state.

Incident tickets are considered “active” and will show up in lists and searches until they are closed.

Moving an Incident into a Canceled state

1. Change Incident State to “Cancelled.”

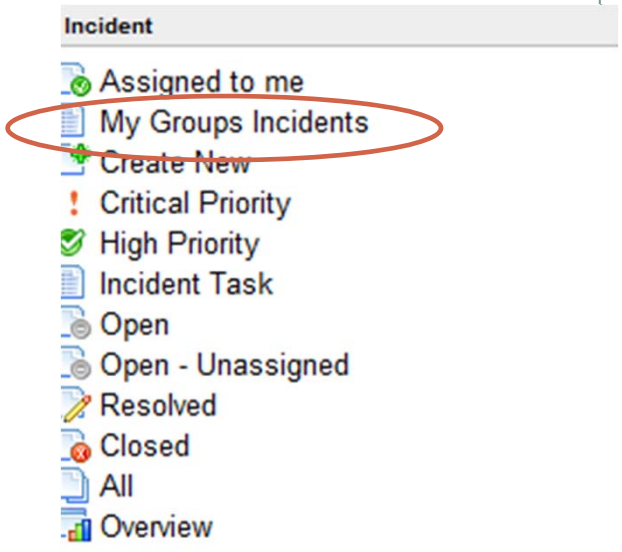


2. Click **Save** or **Save & Exit**.

Assigning a Ticket within Your Team

1. In the Incident module, select **My Groups Incidents**.

If the **Assigned to** field is not visible on your list, you will need to add it. (This only has to be done one time.)



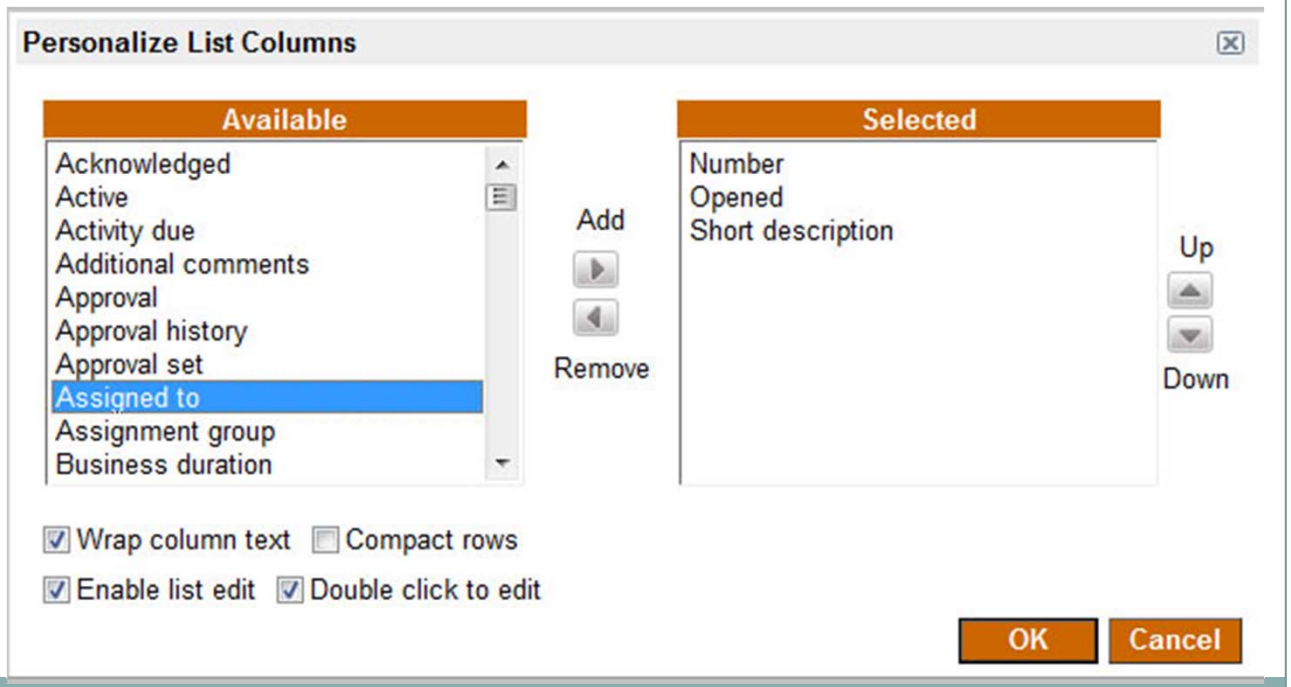
Assigning a Ticket within Your Team, cont'd

2. To add the **Assigned to** field:

a. On the list header, click the *gear* icon.

b. Highlight "Assigned to" and add it to the 'selected' field.

c. Click OK. You should now see the *assigned to* field on your list.



Assigning a Ticket within Your Team, cont'd

To assign a ticket to an individual…

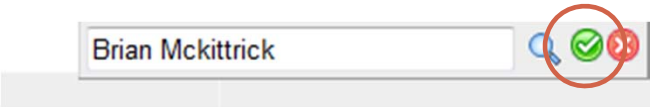
1. Double click in the **Assigned to** column for the desired incident and select the magnifying glass icon.

Number	Opened	Short description	Assigned to
INC000000102648	2011-07-08 10:47:55	I am creating this ticket with the intention of generating a CRQ	Brian Mckittrick
INC000000102584	2011-06-27 20:54:38	dont have any rules	Thomas Bozonelos
INC000000102582	2011-06-27 20:47:57	testing this email would be cool	

2. Select the individual that you wish to assign the ticket to.

Name	First name	Last name	Email
Allen Forni	Allen	Forni	forni@fnal.gov
Brian Mckittrick	Brian	Mckittrick	brianmck@fnal.gov
Cecelia Bruce	Cecelia	Bruce	cbruce@fnal.gov
Charles Hoffman	Charles	Hoffman	chuckh@fnal.gov

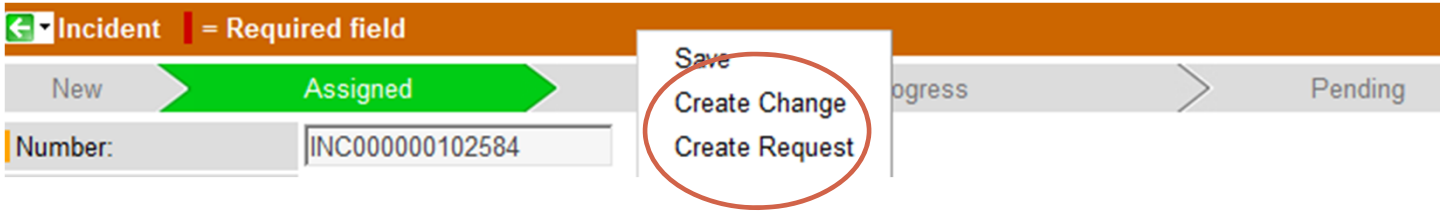
3. Click the green checkmark icon.



Creating a Change or Request from an Incident

- If the work is better represented by a different Service Management process than an incident, you can generate a different type of ticket.
- Information will be carried over from the incident to the new record type.

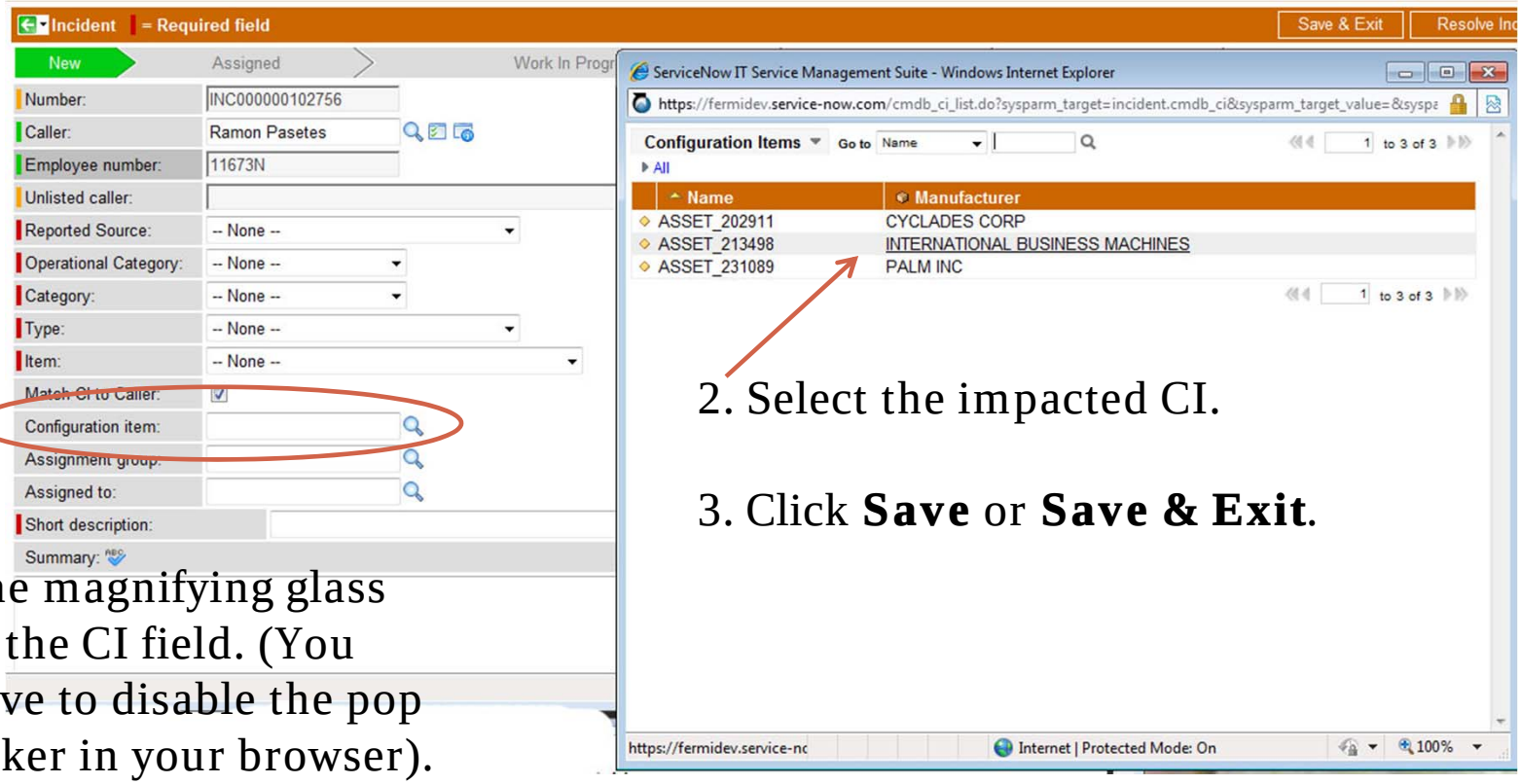
1. Right-click on the Incident header and select the appropriate action (**Create Change** OR **Create Request**).



2. Resolve the incident.

Attaching a CI to an existing Incident

To match a Configuration Item (CI) to a caller.
(Note: Assumes there is a name entered in the **Caller** field.)



1. Click the magnifying glass next to the CI field. (You may have to disable the pop up blocker in your browser).

2. Select the impacted CI.

3. Click **Save** or **Save & Exit**.

More on CI's

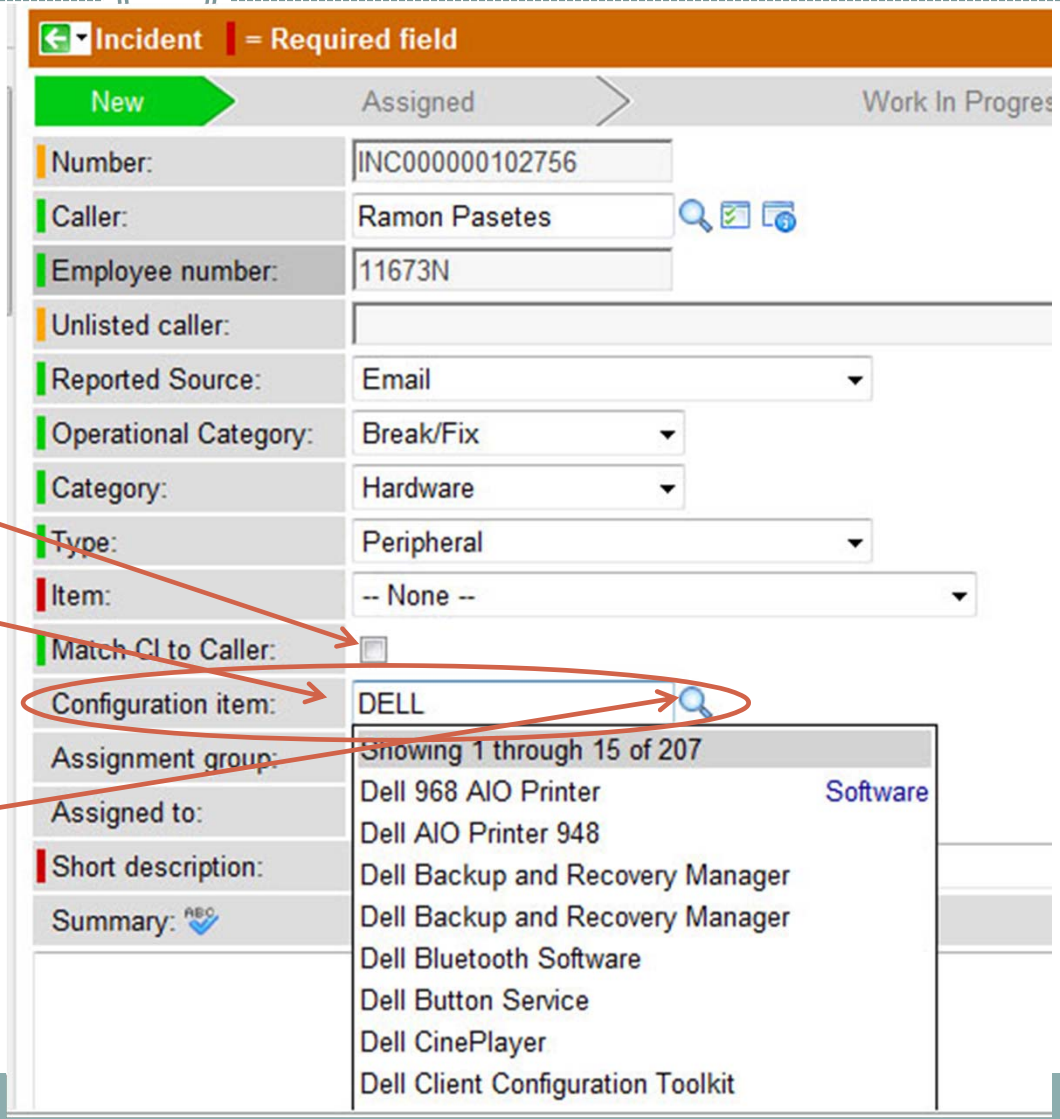
To return a full list of CIs:

1. Uncheck the 'Match CI to Caller' field.

2. Enter the manufacturer or item name in the **Configuration Item** field or

click the magnifying glass next to the field, search for and select the impacted CI.

3. Click **Save** or **Save & Exit**.



Incident Record Related Lists

- After a ticket is saved for the first time, a series of related list will appear at the bottom of the incident form.

Incident by Same Caller: All tickets opened by caller.

Incidents: All tickets related to this incident record. (Steps on attaching a related incident in next section.)

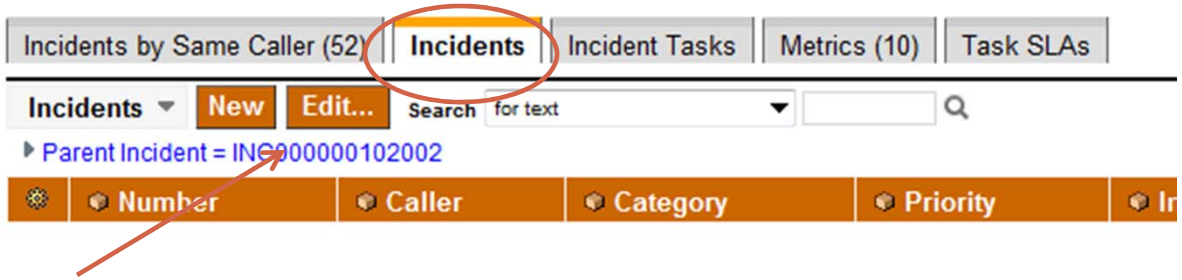
Incident Tasks: For future use. Will show tasks related to incident record.

Metrics: Metrics calculated by system, including: Create to resolve duration; Assigned to duration; Incident state duration; First Call resolution; and assignment group duration.

Tasks SLA: Associated incident SLAs – Mean Time to respond (MTTr) and Mean Time to Resolve (MTTR).

Attaching Related Incidents

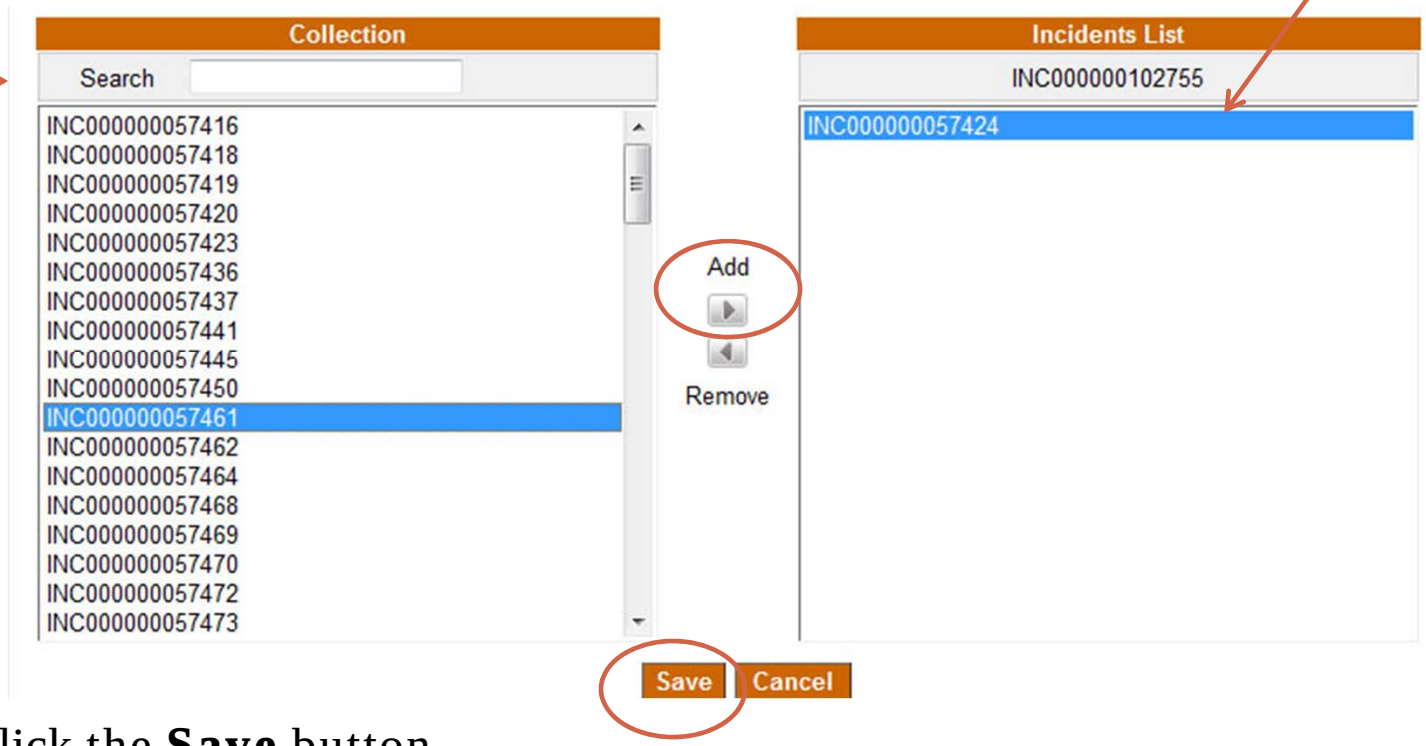
1. Navigate to the incident related lists and select the **Incidents** tab.



2. Click the **Edit** button. (Note, clicking **New** will create new incident record.)

Attaching Related Incidents, cont'd

3. If you know the related incident number, select the record from the collection and click **Add**. The selected incident/s will show in the right pane.

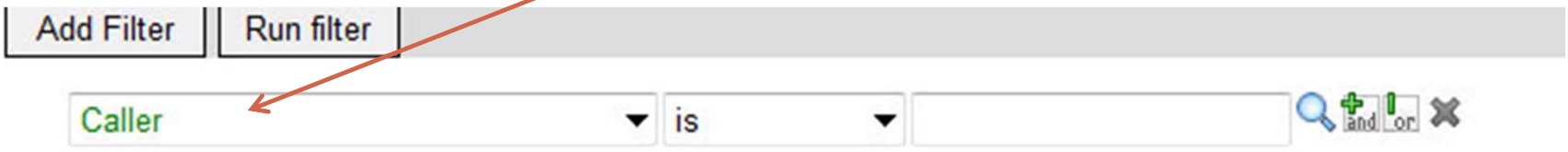


4. Click the **Save** button.

5. If you do not know the incident number, you can perform a search.

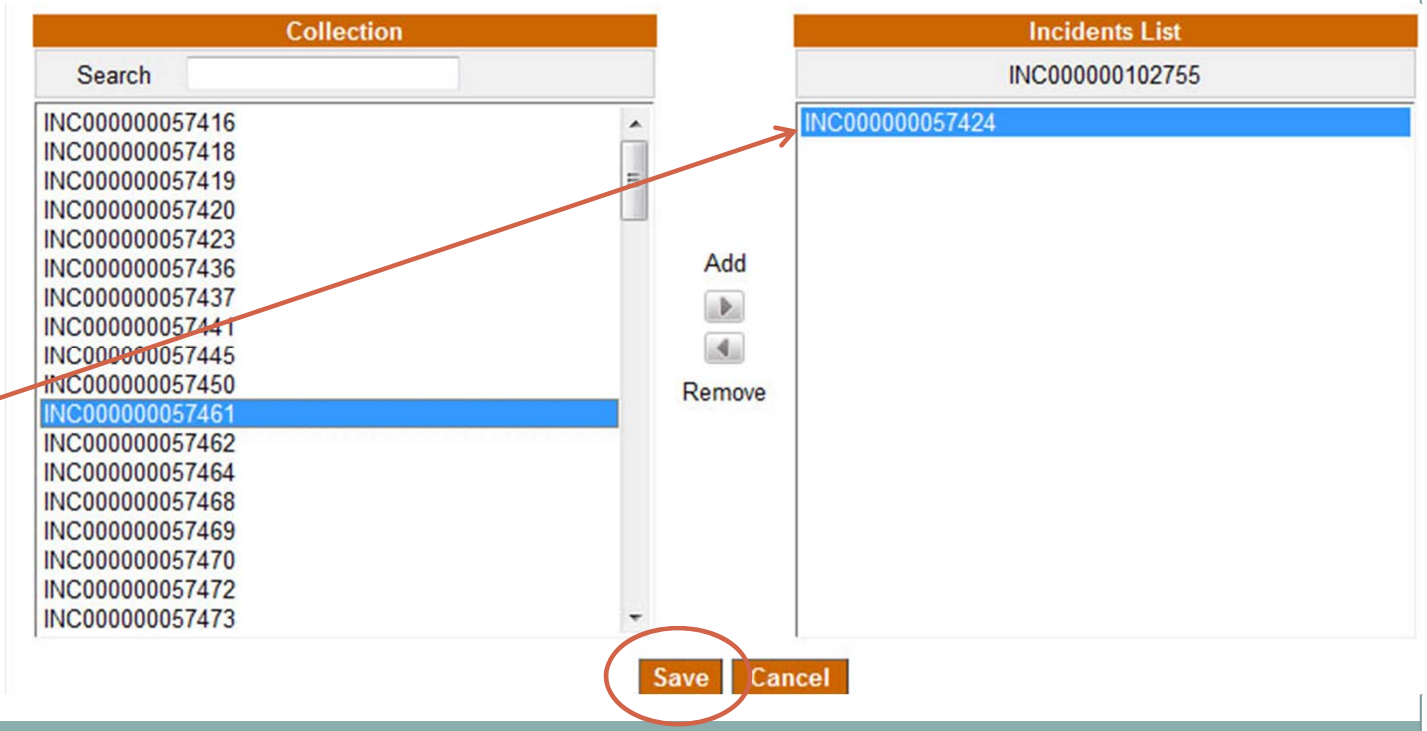
Attaching Related Incidents, cont'd

You can search on many incident fields and create multiple search layers:



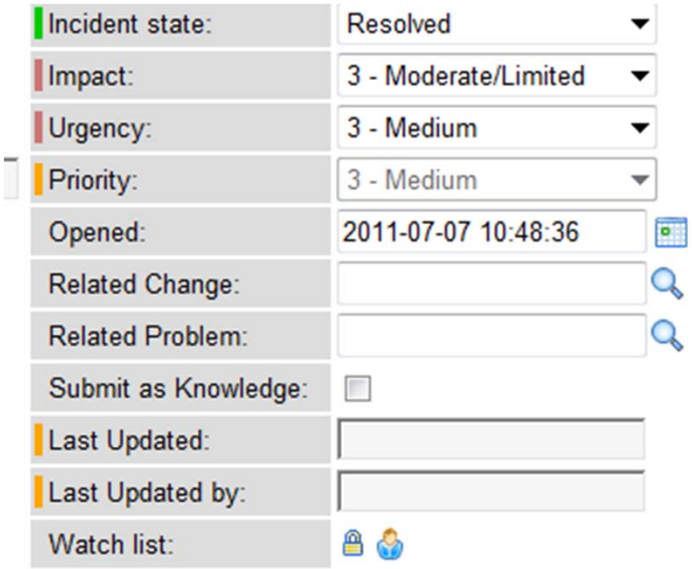
6. Locate the desired incident record, highlight it and click **Add**. The incident will show in the right pane.

7. Click **Save**.



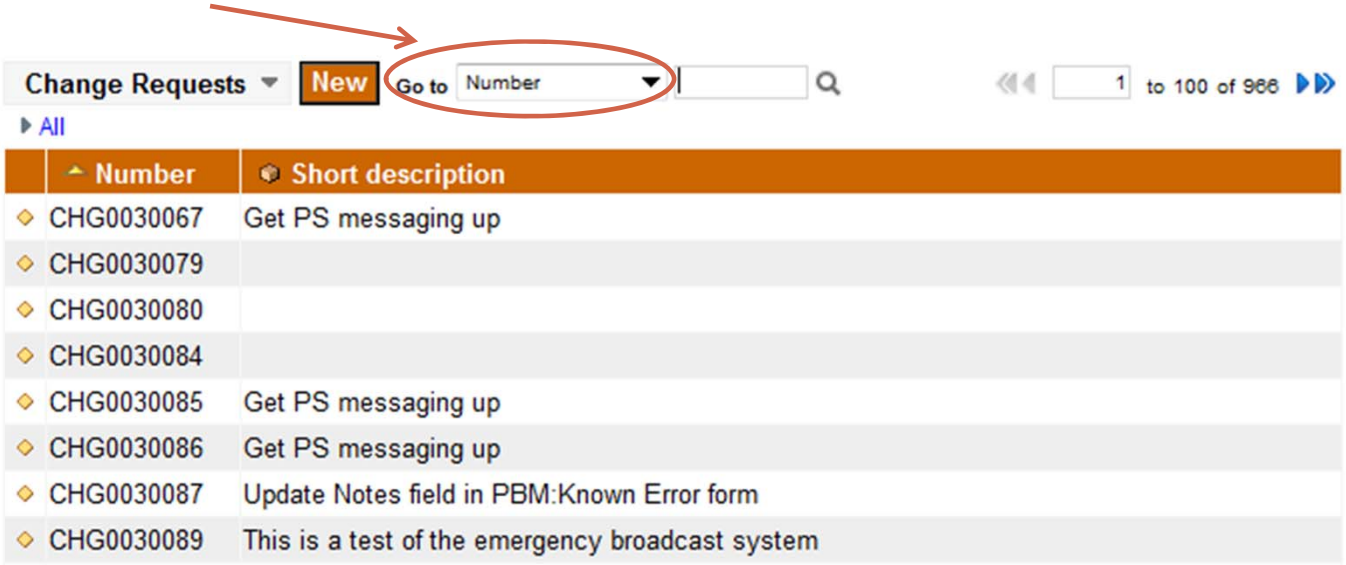
Attaching a CRQ or Problem to an Incident

1. Click the magnifying glass next to the Related Change/Problem field, depending on which you are attaching.



Attaching a CRQ or Problem to an Incident, cont'd

2. Search for and select the related Change or Problem ticket.
   - by Request, Number, Text or Short description



3. Select the related record.

4. Click **Save** or **Save & Exit**.

Collaborating

Via Email

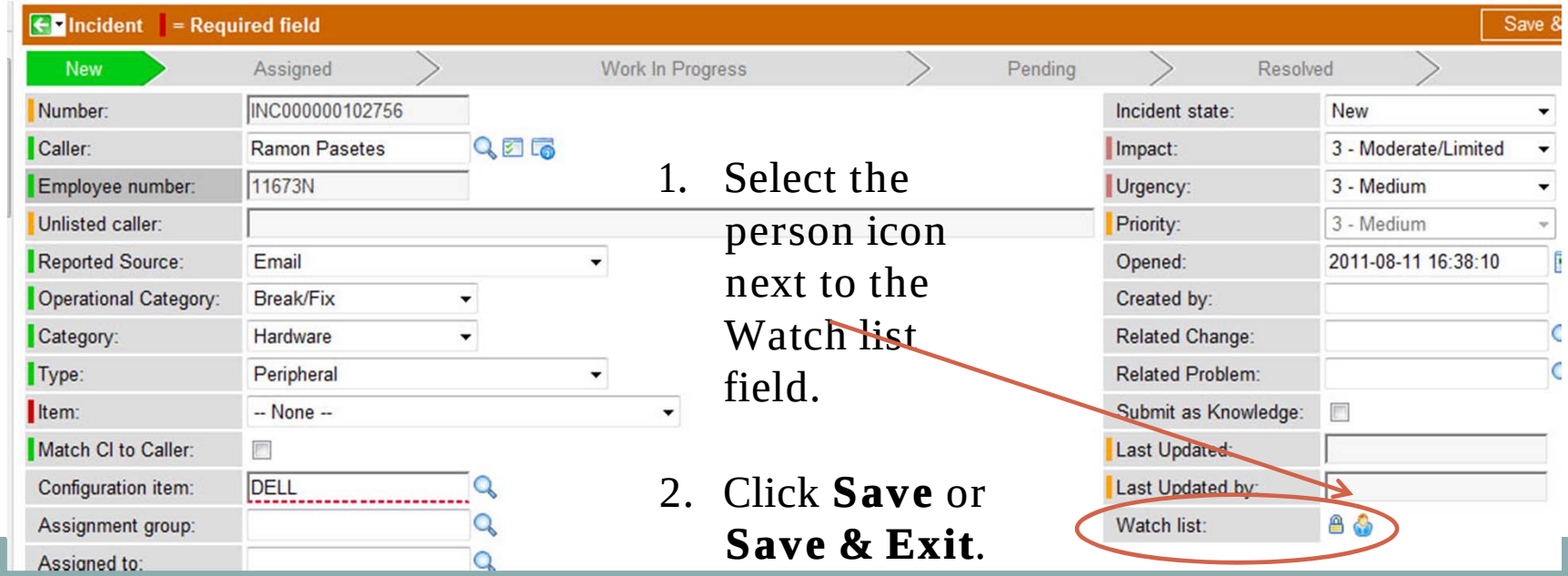
- Email notifications will be sent to Assignee…
  - When ticket is assigned.
  - When a ticket has been commented on.

- If you reply to a system-generated email, the information will be added to the “Additional Comments.”

Collaborating, cont'd

- For interested individuals to get updates on the progress of an incident.
- The following notifications are sent to individuals on the watch list:
  - o Incident Opened
  - o Incident Commented
  - o Incident Resolved

Adding yourself to the watch list for an Incident



1. Select the person icon next to the Watch list field.
2. Click **Save** or **Save & Exit**.

Collaborating, cont'd

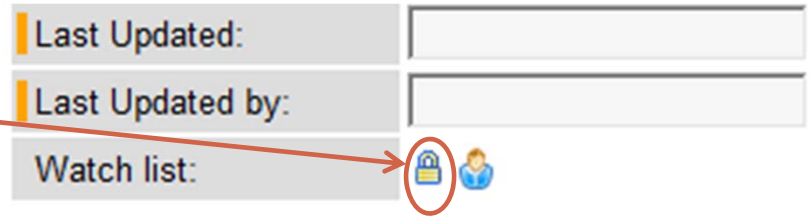
Adding someone else to the watch list for an Incident

1. Select the lock icon next to the Watch list field.

2. Click the magnifying glass, search by name and select the appropriate person.

3. Once the record is selected, and the name appears in the watch list field, click the lock *icon*.

4. You can also enter an address in the email field....

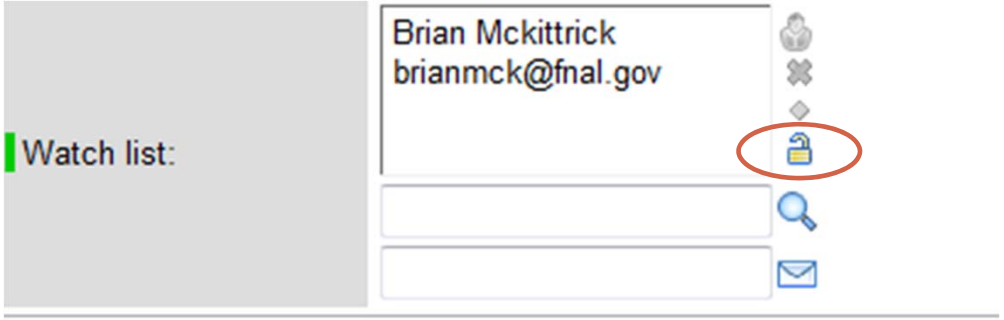


Collaborating, cont'd

4. Enter an address in the email field and click the email icon to validate the address.

Once the email address is validated, it will be entered to the watch list.

5. Click the lock icon to close the watch list.



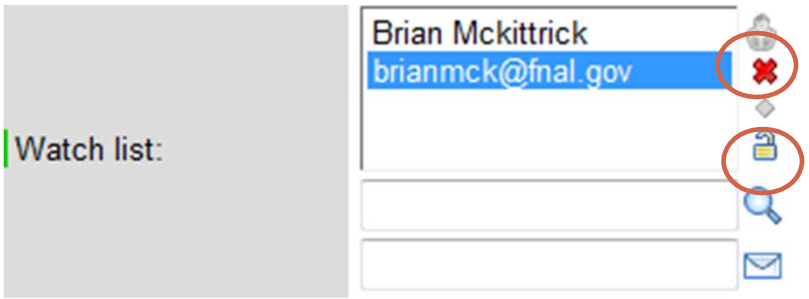
Collaborating, cont'd

Removing someone from the watch list for an Incident

1. Click the lock icon next to the watch list field to expand the field.

2. Highlight the record to delete.

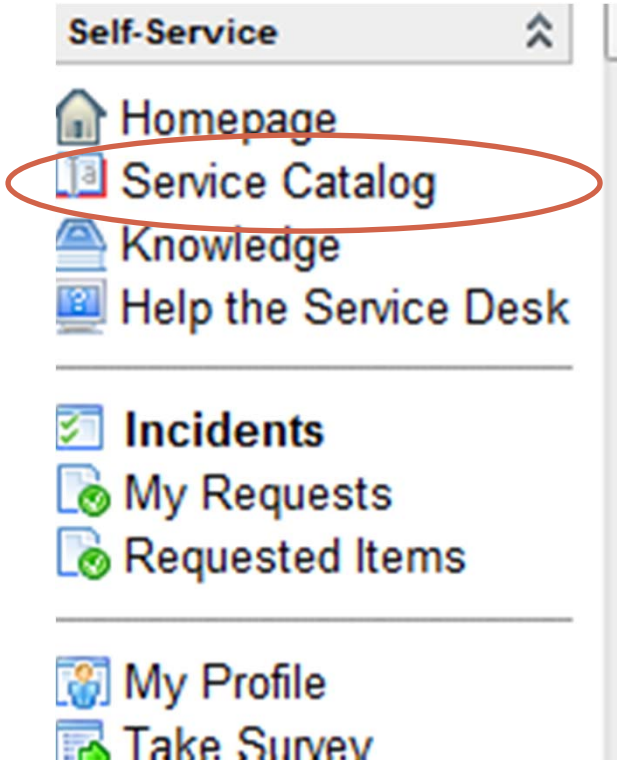
3. Click the X icon to delete the record.



4. Click the lock icon to close the watch list.

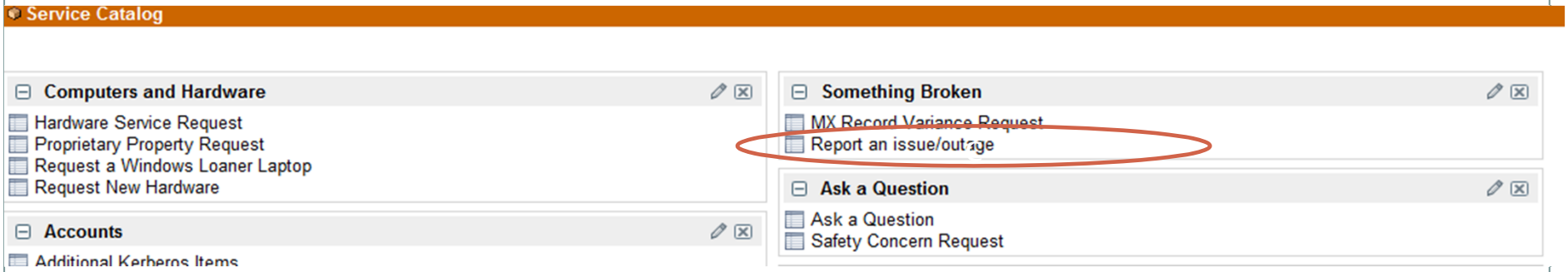
Creating an Incident Using Self-Service View

- Select “Service Catalog” from the Self-Service module.



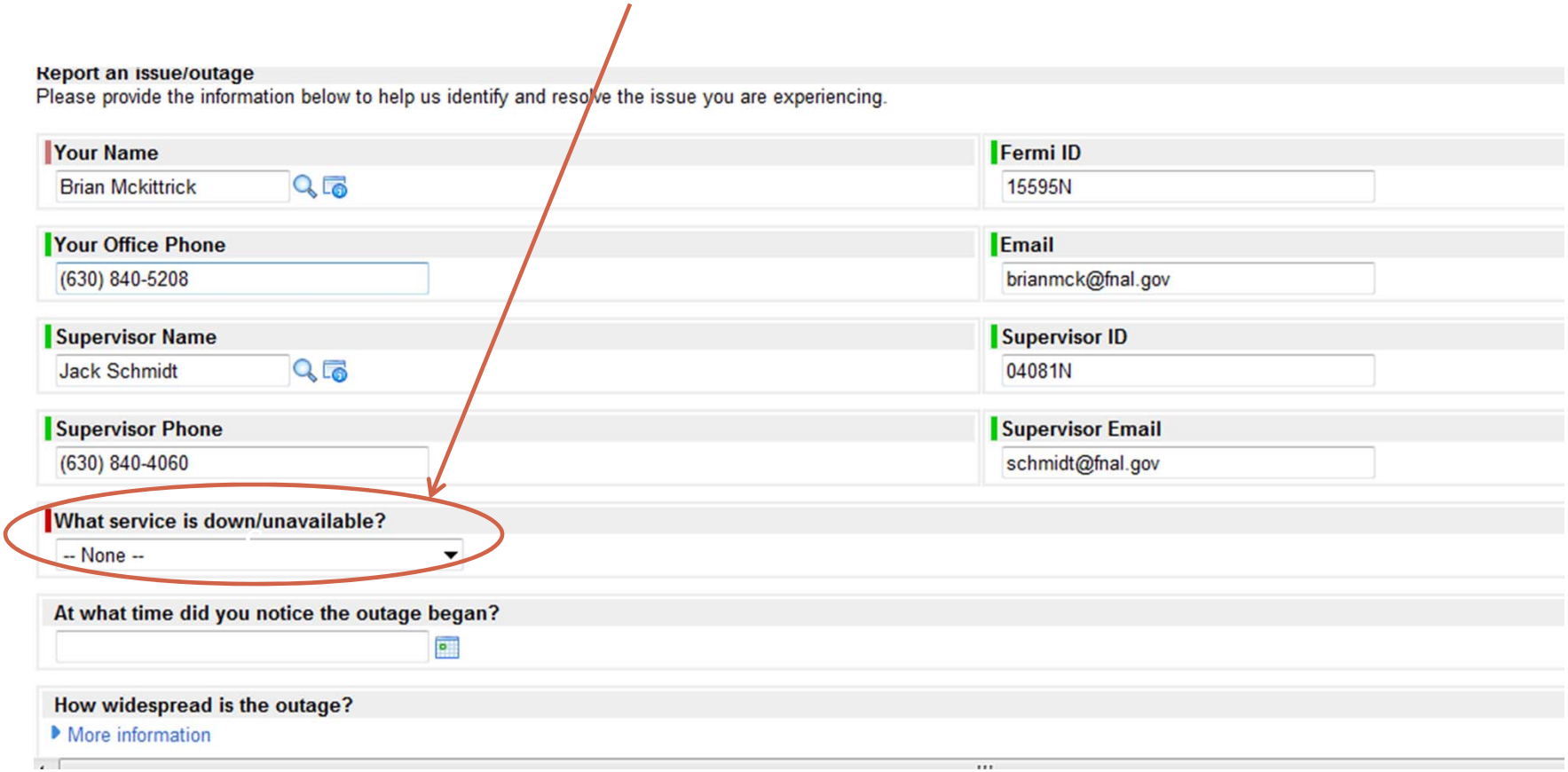
Creating an Incident, cont'd

- Click "Report an issue/outage."



Creating an Incident, cont'd

- Fill in the required information.



Documentation

- This talk in DocDB: #4415

  https://cd-docdb.fnal.gov:440/cgi-bin/ShowDocument?docid=4415
  (It will evolve.)

- Sessions on other training modules will be announced via email.