

Fermilab Computing Sector

Service Support Records Management

Procedures Document

Author:	Tim Currie
Title:	Service Manager
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RECORDS MANAGEMENT

SERVICE SUPPORT

Records management for Service Support (a function within Service Management), are electronic records that reflect decisions made by the responsible parties within the Computing Sector outside the scope of regular operations, necessary to sustain services at agreed-to levels in support of the lab's operation and mission.

Electronic records of service support decisions are stored indefinitely within the Service Desk repository (Service-Now) in the form of Problem Records and Change Records.

PROBLEM RECORDS

Problem records (or PRB tickets within the Service-Now repository) reflect incidents that have been escalated due to one of the following conditions:

- An incident is deemed critical and requires escalated root cause analysis (either direct or indirect)
- An incident has a work-around, but still requires escalated root cause analysis for a permanent solution
- An incident is recurring, and so requires escalated root cause analysis for a permanent solution

The problem manager decides the incidents that meet the criteria above as part of the problem management process. The outputs of the problem management process are the following:

- Root cause determination
- Recommended permanent solution (which will result in a change request)
- A decision not to implement a permanent solution
- A decision to discontinue root cause analysis if deemed impractical or no longer relevant

Problem Management Document ID CS-doc-3248-v6

The document can be found here: <http://cd-docdb.fnal.gov:8080/cgi-bin/ShowDocument?docid=3248>

CHANGE RECORDS

Change records (or CHG tickets within the Service-Now repository) reflect the following conditions:

- Incidents (INC) or Problems (PRB) that require changes to be made in the IT infrastructure in order to restore service or implement a permanent solution.
- Requests for non-standard service provisioning or enhancement requests that require managed resources in the form of projects to effect a change in the infrastructure to delivery required functionality.

Service providers and the change manager, sometimes in consultation with the change advisory board, decide what changes are ready for "build approval" as well as what changes are ready for "go-live" approval. The outputs of the change management process are the following:

- An approved to build change
- An approved to go live change
- A rejected change
- A post implementation review of a change
- A latent change (for changes already implemented as part of incident resolution)

Change Management Document ID 3530 v5

The document can be found here: <http://cd-docdb.fnal.gov:8080/cgi-bin/ShowDocument?docid=3530>

RECORDS MANAGEMENT

SERVICE MANAGEMENT WORKFLOW

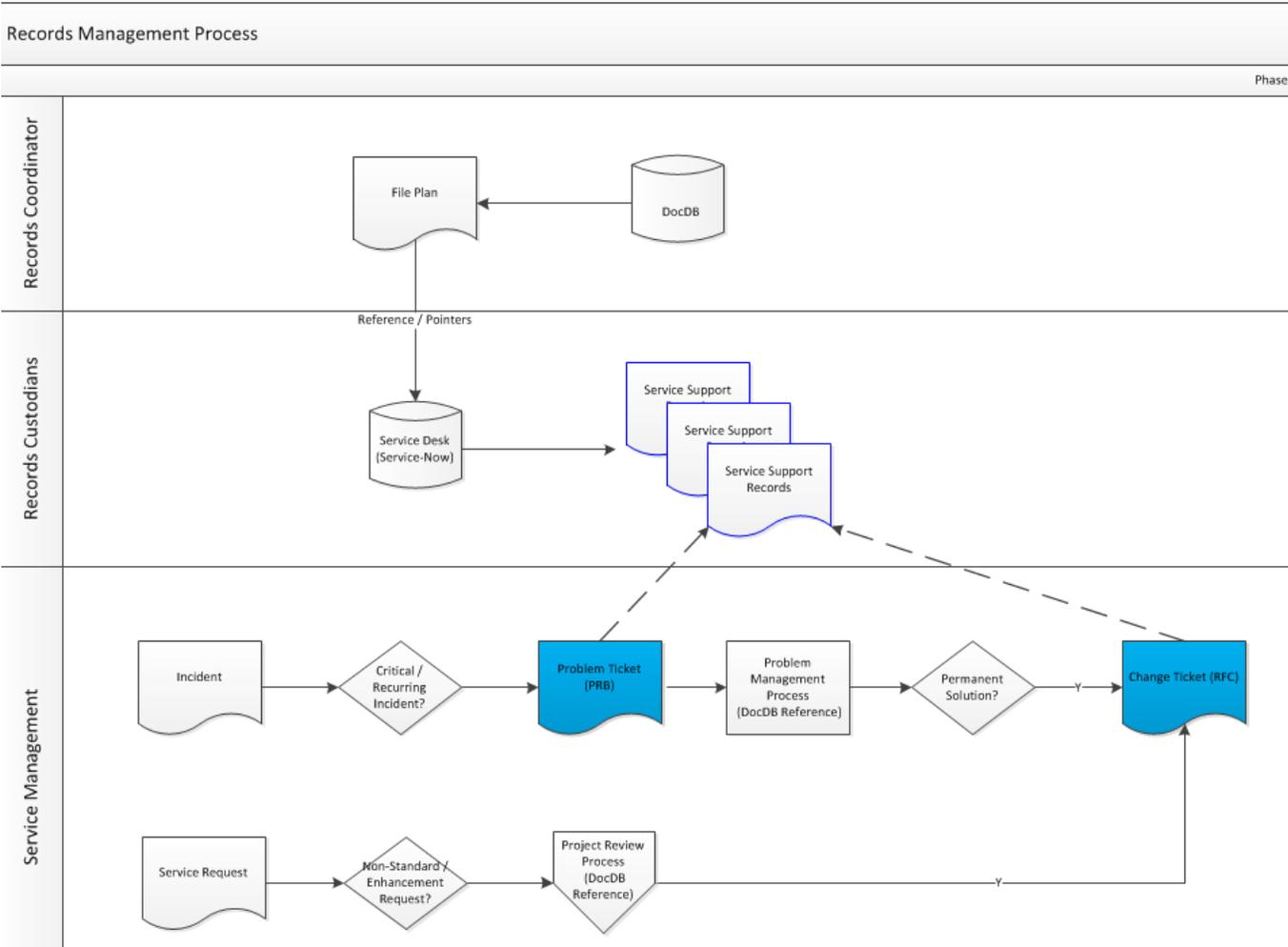


Figure 1-1 above illustrates the records management process and its inputs from Service Support (as part of the Service Management best practices)

RECORDS MANAGEMENT

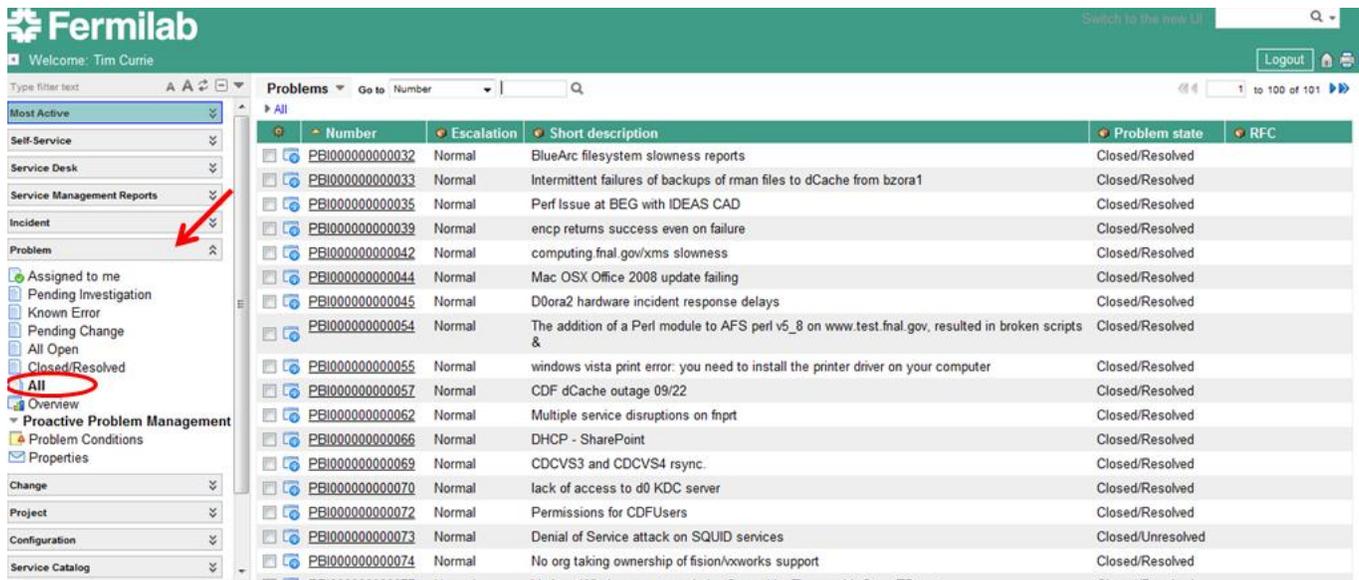
ACCESSING SERVICE SUPPORT RECORDS

To access records management for Service Support, login to Service-Now at the following link: <https://fermi.service-now.com>. Login using your services password for authentication.



Access the problem management section through the following steps:

1. Select "Problem" from the left-hand side of the landing page
2. Select "All" under the section to view all problem records in any state
3. Once selected, all Problem (PRB) records will be returned in the record list, and can be sorted, filtered accordingly to facilitate a records review or audit.



Access the change management section through the following steps:

1. Select "Change" from the left-hand side of the landing page
2. Select "All" under the section to view all problem records in any state
3. Once selected, all Change records (CHG) will be returned in the record list, and can be sorted, filtered accordingly to facilitate a records review or audit.

The screenshot shows the Fermilab Change Requests management interface. The left sidebar contains a navigation menu with the following items: Most Active, Self-Service, Service Desk, Service Management Reports, Incident, Problem, Change, Assigned to Me, Assigned to My Group, Changes Awaiting My Approval, CAB Review, Create New, Open, Closed, All (circled in red), Overview, Forward Schedule of Change, Project, Configuration, and Service Catalog. A red arrow points to the 'Change' section in the sidebar. The main area displays a table of change requests with the following columns: Number, Short description, Type, State, Scheduled Start Date, Scheduled End Date, and Assignment group. The table contains several rows of data, including change requests for 'Change Management Fixes for New Service Now system', 'Upgrade Peachtree Software to "Complete Account 2012" - For Acct./Housing', 'NAS: Modify production monitoring scripts to send alerts to Service Now', 'Swap out failed disk on Dell/Equallogic iSCSI array', 'Change DZero L3 Switch - Online Switch Link to Trunk', and 'Move Locally Installed Peachtree installation (data) to a server based installation - For FRA'.

Number	Short description	Type	State	Scheduled Start Date	Scheduled End Date	Assignment group
CHG000000003002	Change Management Fixes for New Service Now system.	Latent	Closed	2011-10-24 15:44:44	2011-10-24 16:45:03	Service-Now Support
CHG000000003007	Upgrade Peachtree Software to "Complete Account 2012" - For Acct./Housing	Standard	Build and Test	2012-02-15 09:00:00	2012-02-15 17:00:00	Enterprise Applications
CHG000000003009	NAS: Modify production monitoring scripts to send alerts to Service Now	Standard	Closed	2011-10-19 15:30:00	2011-10-19 15:40:00	Storage Network Services
CHG000000003010	Swap out failed disk on Dell/Equallogic iSCSI array	Standard	Cancelled			Virtual Services
CHG000000003011	Change DZero L3 Switch - Online Switch Link to Trunk	Minor	Closed	2011-10-24 13:30:00	2011-10-24 14:00:00	Network Services
CHG000000003014	Move Locally Installed Peachtree installation (data) to a server based installation - For FRA	Standard	Draft			Enterprise Applications