Implementing ITIL® Processes Using Numara® Track-It! 9®

Implementing ITIL® Processes Using Track-It! (Overview)

Note: ITIL® is a suggested best practice framework. The following instructions are recommended guidelines only. Each customer implementation may vary depending on ITIL® interpretation and your organization's requirements.

You can configure Track-It's Help Desk module and use the Change Management module to support the IT Infrastructure Library (ITIL®) incident, problem, and change management processes. This involves a few simple configuration changes in the Help Desk module and following a particular workflow between the Help Desk and Change Management modules. You can also use the Request Types defined below to create custom reports.

ITIL® Definitions and Examples

ITIL® provides guidance about creating and operating a Service Desk to provide efficient communication between the user community and the IT provider. The job of the Service Desk is to provide effective Incident, Problem, and Change management.

Service Request

A Service Request is a request from a User for information, advice, a standard change, or for access to an IT service. Service Requests are usually handled by a Service Desk, and do not require a Request for Change (RFC) to be submitted. Service Requests do not involve any failure in the IT Infrastructure. The objective of request fulfillment is to assist with general information and to provide a channel for users to request and receive standard services for which a pre-defined approval and qualification process exists.

Translation: The Level 1 team handles these issues because they can be closed quickly and do not affect many customers.
Examples: Requests for information, "how to" questions, and recurring requests for standard services.

Incident

An incident is an unplanned interruption of an IT service or a reduction in quality of an IT service. The objective of Incident Management is to restore normal service operation as quickly as possible and minimize the adverse impact on business operations. This ensures that the best possible levels of service quality and availability are maintained.

Translation: The Level 1 team handles these issues because they can be closed quickly and do not affect many customers.
Examples: Cannot send or receive e-mail, cannot access internet, or printer won't print.

Problem

A Problem is an unknown cause of one or more incidents. The objective of Problem Management is to prevent problems and resulting incidents from happening, to eliminate recurring incidents, and to minimize the impact of incidents that cannot be prevented.

Translation: These are incidents that Level 1 support cannot handle or may be affecting many customers. (These are generally referred to as Problems before the cause is known, and Known Errors once the cause is determined.)
Examples: Exchange server has crashed, network drive is down, or printer is damaged.

Request for Change

A Request for Change is a formal communication seeking an alteration to one or more configuration items. The objective of the Change Management process is to ensure that changes are recorded and then evaluated, authorized, prioritized, planned, tested, implemented, documented, and reviewed in a controlled manner.

Translation: All IT-related changes that may affect one or many customers are tracked with Change Management.
Examples: Adding memory to a computer, purchasing a new server, or installing the latest Windows operating system on computers.

Configuring Track-It! for ITIL® Processes

The following describes how to configure the Help Desk module to support ITIL® processes. Follow the instructions in the Configuring Change Management Workflow topic so that the Incident or Problems enter the Change Management process where necessary.

Step 1: Set up Work Order Types

If you've already set up Work Order Types, you can use the existing Types, Subtypes, and Categories or create new classifications. For more information on Work Order Types, see Classifying the Work Order Issue in the Technician's Guide.

Step 2: Set up Work Order Notifications

Set up Work Order Notifications so that Technicians are automatically notified when a Work Order event occurs.

Step 3: Set up Skill Routing Policies

Skill Routing Policies allow you to assign specific Technicians to Work Orders based on their skill sets, which correspond to matching criteria on the Work Order fields.

Step 4: Set up Request Types

The following instructions describe how to set up a Work Order so that you can use a custom lookup table to classify types of requests (service request, incident, problem, and known error).

To Create a Customized Lookup Field for Request Types:

1. From Track-It!'s main menu bar, select **Tools > Administration Console > Lookup Tables > Help Desk**.
2. Select one of the **Lookup Tables** (Lookup#1 through #8).
3. Click the **Add** button.
4. In the **Name** text box on the **User Lookup** dialog, enter "Incident", then click the **Save** button.
5. Repeat the steps above to enter the values "Problem" and "Service Request".

To Change the Work Order's Field Label to "Request Type" and Set the Default to "Service Request":

1. Open a Work Order.
2. Click in the **Lookup Table** field that you set up above, then press the **CTRL+F2** keys.
3. On the **Field Options** dialog, enter the "Request Type" in the **Label** field.
4. To use "Service Request" as the default value that will automatically display in the field, enter it in the **Default Value** field.
5. Click the **OK** button.

Now when a Work Order is created, the default Request Type will be set to Service Request

Step 5: Customize the Help Desk Grid View to Display the Request Type

This will enable you to quickly view the lists of Work Orders by Request Type.

To Customize the Help Desk Grid View to Display Request Type:

Note: You may need to exit re-start the Technician client to ensure your change to the Look Up field has been saved.

1. Right click anywhere on the grid, then select **Customize**.
2. In the **Customize Grid** dialog (**Columns** pane), select the Request Type, then click the **Add** button.

ITIL® Incident, Problem, and Change Workflow in Numara Track-It!

After the Help Desk and Change Management modules are configured to support ITIL® processes, follow the example workflow below.
In this example, Incidents relating to e-mail access will be created. Ultimately, it is determined that the Exchange Server needs a critical software update and is affecting many customers. A Problem and Request for Change will be created to resolve the issue.

Step 1: Create Work Orders and Classify Requests as Incidents

A Technician creates an Incident for a User's request indicating they are having trouble with their e-mail. Similar Incidents have also been created by other Technicians.

1. Create and populate the Work Order. Select the **Classification Type**, **Subtype** and **Category**.
2. Select the **Request Type** "Incident".
3. Save the Work Order.

Step 2: Create a New Work Order or Copy the Work Order and Define It as a Problem

Several e-mail related Incidents have now been created. It has been determined that the e-mail Incident is affecting multiple users and cannot be resolved quickly. The incident will now become a Problem and enter the Problem Management process.

1. Create a new Work Order or copy one of the Incident Work Orders.
2. Change the **Subtype** and/or **Category** as appropriate.
3. Change the **Request Type** to Problem.
4. Save the Work Order.

Step 3: Assign Incident Work Order(s) to Problem Work Order

In order to keep track of who is affected by the Problem and to ensure they are notified when the problem is resolved, Incidents should be associated to the Problem. When the Problem is closed, the assigned Incident Work Orders will also close.

1. Make sure the Help Desk grid view is customized to show the **Request Type** column to easily determine which items are incidents.
2. On the Help Desk grid, select the Incident Work Order and assign it to the Problem Work Order.

Step 4: Root Cause Requires Problem Work Order to Enter Change Management Process

The problem team determines that the Exchange Server needs a critical software update to resolve the e-mail Incident. The Problem is classified to reflect the needed software update which causes it to automatically enter the Change Management process.

1. Change the **Subtype** and/or **Category** as appropriate after the root cause is determined.
2. If a Change Management policy is set up causing the Problem Work Order to automatically enter the Change Management process, a message will display. Click **OK**.
3. To view details, click the **Change Management** tab on the Work Order.

Step 5: Final Decision on Request for Change Notification Received

Once the Request for Change has been approved, the Problem team can resolve the issue and the Problem Work Order can be closed. This will notify all users who created Incidents.

1. Enter the resolution and any other information you want to add to the Problem Work Order.
2. Because there are Assignments, when you attempt to change the Work Order's status to Closed, a message will display. Click **Yes** to close the parent Work Order and Assignments.