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CSM 10.5.0 ITSM Practices

Legal Notices

The Cherwell Software product suite includes:

- Cherwell Service Management
- Cherwell Asset Management

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Contents

ITSM Practices

CSM provides an ITSM solution to support multiple features and processes.

Business Objects that support Multi-Sourcing Service Integration (MSI) and Service Integration and Management (SIAM) are available as part of this solution. For more information, see The Relationship between CSM and Multi-Sourcing Service Integration and Service Integration and Management.

CSM is highly configurable so your processes and content will vary.

Incident/Service Request Management

Incident/Service Request management is the process that ensures that Services are restored as quickly as possible.

This can cover:

- Incident: Restoring something that is broken/disrupted (example: Fixing a printer, phone, or software).
- Service Request: Fulfilling a request for information/advice or access to a Service (example: Resetting a password, granting access to a printer, or providing standard setup Services for a new employee).

Note: In CSM, Incidents and Service Requests (often called Requests) are stored together in the Incident Business Object.

About Incidents and Service Requests

An Incident is an unplanned interruption to a service or a reduction in the quality of a service (example: Something is not working). A Service Request is a request for information, advice, a Standard Change, or access to a service (example: Installation of new software).

In CSM, Incidents and Service Requests are stored together in the Incident Business Object. The categorization (Service/category/subcategory) identifies the record as either an Incident or Request. A categorization often requires a unique form to capture the correct information. For example, an Incident for a non-working network printer would require different information than a Request for printer toner cartridge. To facilitate gathering this specific information, CSM embeds and uses several default Specifics Forms, which are automatically displayed when you categorize the record. For more information, see Specifics Forms.

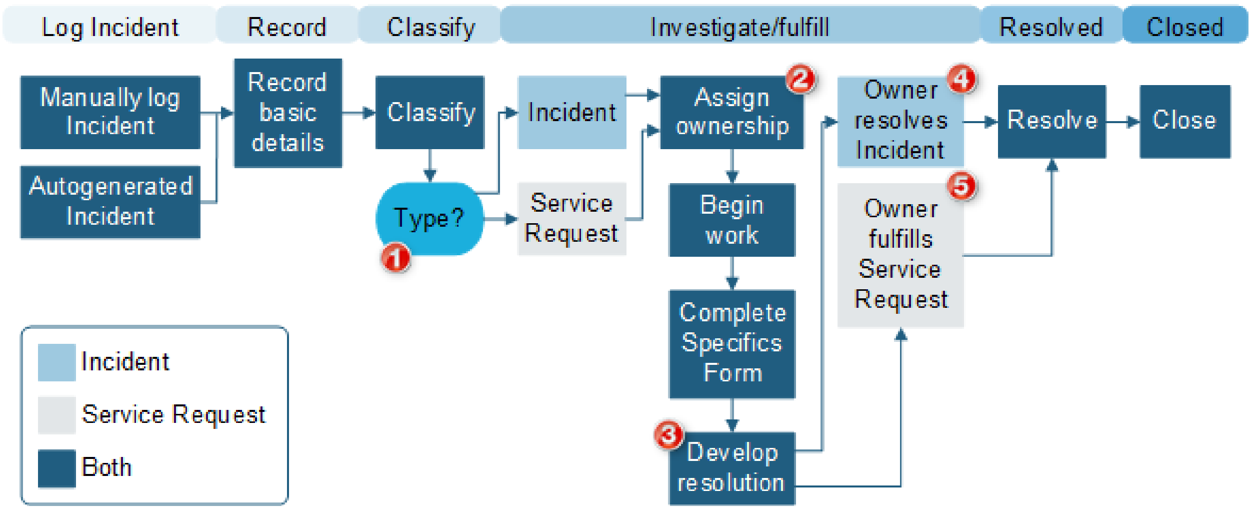
Good to Know

- The workflow for Incidents and Service Requests is almost identical, and the forms are similar. Specifics Forms always vary.
- CSM provides several default Automation Processes to automate Incident management. For more information, refer to the Automation Process documentation.
- When on a record, you can send an email directly to the current customer by selecting **File > E-mail Current Customer**, or by selecting the customer's email address in the Incident Form. If using the File menu, the email is blank. If using the Default Form link, an email template is used to auto-populate the email with information from the current Incident (example: Incident ID, customer's name, and logging date/time details).

Incident and Service Request Workflow

Incidents and Service Requests have similar (but slightly different) workflows.

The following figure describes the high-level Incident/Request workflow.



1	The choice between Incident and Service Request is automatically determined by CSM: • Incident: Initiator reports that something is not working. • Service Request: Initiator requests information, advice, access or a standard change. Incidents are investigated and resolved, Service Requests are fulfilled.
2	• Assigned team: Select the team owner. • Assigned to: Select the owner. • Assign to me: Make yourself the owner.
3	Owner: • Searches the Knowledge Base. • Views similar Incidents/Service Requests. • Creates Tasks (example: Work Items, Escalations, Time Tracking). • Uses Actions (example: One-Step Actions, Quick Templates). • Selects available Service Catalog Template (SCT).

4	Owner resolves the Incident by: • Marking it as Resolved. • Recording the resolution details. • Recording the resolution code.
5	Owner fulfills the Service Request by: • Marking it as Resolved. • Recording the resolution details.

Note: CSM uses several features to manage the Incident or Request workflow (example: The Incident Form helps create and track Incidents, One-Step Actions help move an Incident through its workflow, Automation Processes notify stakeholders via emails, dashboards notify stakeholders and track metrics, SCTs and Work Units allow automation of tasks, etc.). See Incident Features, Incident One-Step Actions, and Incident Automation Processes.

Contributors

An Incident or a Request typically involves the following contributors. Depending on your workflow and the size of your company, some of these contributors might be combined into one person:

- **Requester:** Person who initiates the Incident/Request. This is typically a customer.
- **Creator:** User who first logs the Incident/Request. This is a user; the level varies depending on tiered support.
- **Owner:** User who manages (investigates/resolves/fulfills) the Incident/Request. This is typically a technician; the level varies depending on tiered support.
- **Task owner:** User to whom Tasks are assigned in order to help resolve/fulfill an Incident/Request (example: Work Unit owner, Approval owner).

Statuses

An Incident or a Request progressing through the workflow encounters the following statuses:

1. **New:** Incident/Request is being created, recorded (initial details), classified, and assigned to an owner.
2. **Assigned:** Incident/Request has been assigned to an owner.
3. **In Progress:** Incident/Request is being investigated/fulfilled and resolved by an owner.
4. **Pending:** Incident/Request is temporarily paused (Stop The Clock).
5. **Resolved:** Incident/Request has been resolved and is waiting to be closed.
6. **Closed:** Incident/Request is closed.

7. **Reopened:** Incident/Request is reopened because the issue was not fixed or reoccurred.

Related concepts

Incident Form

Incident One-Step Actions

Create an Incident

Create an Incident

The following procedures walk you through the steps required to create an Incident and how to classify it as a Major Incident. The process to create a request follows a similar workflow.

Log the Incident

Create an Incident record and provide initial details.

1. On the CSM Desktop Client toolbar, select **New > New Incident**. See CSM Desktop Client toolbar.

   Note: If configured, an Incident can also be logged by an automated process or by a customer in the CSM Portal. After an Incident is logged, a CSM creator or technician moves the Incident through the Incident workflow. See Incident and Service Request Workflow.

2. Record Incident details:
   a. Call Source: Select a source or method of contact from the drop-down list.
   b. Customer: Select a customer from the **Related Item Picker**.
      i. (Optional) If the Incident is being submitted on behalf of another user, select **Submit on Behalf Of** and select the requester. You are also prompted to select who should receive email notifications.
      You can select this option again to change or remove the requester.
      ii. Select **OK**.

      Note: You can also select **Add Requester** in the **Actions** list to submit on behalf of another user. To remove or change the requester, select **Remove/Change Requester** in the **Actions** list.

   c. Description: Provide a description for the Incident (example: Cannot print to network printer). The description field is a rich text field. To format the text or embed an image, select the **Zoom** button. See About Rich Text.

Classify the Incident

The second step on an Incident form is to classify the Incident. Categorize, prioritize, and escalate to a Major Incident, if necessary.

1. Service Classification: Enter a service classification or select the **Related Item Picker**. The **Related Items** dialog box opens with a list of available service classifications. Select the classification that matches the Service, Category, and Subcategory for the Incident.

   Note: Incident Type is determined by the Service Classification. This three-tiered categorization determines the Incident Type (Incident or Request), which specifics form to display and which SLA to invoke. See Specifics Forms. If you do not know the three-tiered classification, enter a word into the **Quick Assembly** field (example: Printer) then press **TAB**

or **ENTER** to locate a possible match. Wildcards (% or *) can be used when searching. If matches are found, the **Category Selector** opens.

After an Incident is identified as an Incident or Request, the relevant specifics form is displayed.

2. Prioritize the Incident:
    a. Select the **Priority** drop-down list, and select a priority number from the Priority Matrix. The selected priority is displayed in the Default form.
    After a priority is selected, Respond By and Resolve By Target Times are calculated based on the defined Priority Target Times in the invoked SLA, and are then displayed in the SLA section of the Incident form. The Respond/Resolve By fields indicate when the Target Times (deadlines) are met and breached. If enabled (via an Automation Process), emails are automatically created and sent to the managers of user/team owners to notify them of potential SLA Respond/Resolve By breaches.

Note: If necessary (and allowed by the invoked SLA), place the record in a pending state to stop the SLA clock anytime after the required fields are populated by selecting the **Set to Pending** link in the **Actions** list. After you select a pending reason (example: Need data from customer), the status changes to pending and the pending reason (with a review date) displays in the **Status** bar. To remove the status from pending, select the **Remove from Pending Status** link in the **Status** bar.

3. Select a Primary Configuration Item (CI):
    a. Select the **Related Item Picker** to launch the Find Related window, where you can select a CI. You can locate CIs by filtering (by Config Type, All Customers, a specific Customer) or by searching. You can also create a new CI on the fly.
    The selected CI record appears on the Configuration Items tab (arrangement area).

Tip: To view the selected CI record, select the **Quick View** button or select the record on the Configuration Items tab (in the form arrangement). To view impacted CIs, select **View Impacted CIs** in the **Actions** list to open a Configuration Map that shows other CIs affected by the Incident.

4. Assign the Incident to a Team.
    a. Enter the name of a team or select the team from the drop-down list. First Level Support is the default team.
5. Assign the Incident to a member of the assigned team.
    a. Select the team member from the drop-down list.

Escalate to a Major Incident

A Major Incident has a company impact and requires a high level of urgency. It may involve several departments, or may be the result of multiple related Incidents. For example, if several Incidents have been submitted regarding login issues to Microsoft Outlook, and the cause of these Incidents is that Microsoft Outlook is down company-wide, a Major Incident should be created.

To escalate an Incident to a Major Incident if necessary, select **Change to Major Incident** in the **Actions** list.

1. (Optional): Attach similar incidents in the Linked Incidents tab of the form arrangement. This tab is only visible if the Incident is a Major Incident. Any Incidents linked to a Major Incident can be automatically resolved at the same time as the Major Incident.

   Note: Linked Incidents are automatically updated with the Major Incident ID. If the Major Incident is closed, the linked Incidents are also automatically closed. If desired, create a One-Step™ Action to notify all Incident Owners of the Major Incident Escalation.

2. (Optional): Select **Link to Existing Major Incident** in the **Actions** list if the Incident is a contributing factor to an already open and existing Major Incident.

Resolve the Incident

After an Incident has been logged, classified, and associated Specifics forms are complete, the owner can resolve the Incident.

1. Develop a resolution:
   - Search the Knowledge Base. See Search for Knowledge Using the Knowledge Pane.
   - View Similar Incidents.

     Note: The Similar Incidents tab is displayed only for Incidents. Service Requests do not include the Similar Incidents tab.

   - Use Actions (Actions/One-Step Actions/Quick Templates/Task Forms).
2. After a resolution is developed, resolve the Incident and capture the resolution details:
   a. In the **Status** bar, select **Resolve**.

   CSM prompts you to log the resolution/fulfillment details.

   Note: If the Incident has open tasks associated with it that need to be closed before the Incident is resolved, a message displays to warn you.

3. (Optional) Transfer the resolution to the Knowledge Base/Support Group:
   a. Select the **Submit to KB** button on the Resolution Details form, or select **Submit to Knowledge Base** in the **Actions** list to log a Knowledge Article. See Create a New Knowledge Article.
4. If you discover that the Incident was not resolved, clone it (create a new Incident with fields auto-populated with information from the cloned Incident) by opening the **Task** pane and selecting **Incident Actions > Quick Templates > Clone Current Incident**.

Related concepts

Incident Form

Incident One-Step Actions

Incident and Service Request Workflow

Incident Design Ideas

Use these ideas for tips on how to design an Incident.

- **Fields:** Change required fields and when they are required, and the fields that support rich text.
- **View Counter:** Incrementally track the number of times a record is viewed by a customer or user in the CSM Desktop Client, CSM Browser Client, and CSM Portal. View Counter functionality is configured in CSM Administrator. See Define Advanced Properties for a Business Object.
- **Statuses:** Change Incident statuses and/or the One-Step™ Actions that are initiated when an Incident enters each status.
- **Form:** Change the form theme (background and text color), tab order, and size. Change the threshold and/or colors for priority.
- **Actions and One-Step Actions:** Create Actions/One-Step Actions to automate your workflow, or implement any of the unused example One-Step Actions that are shipped with CSM (example: *Notify Owned By of Edits* One-Step Action).
- **Email:** Change the templates that are used to create the emails sent by One-Step Actions or Automation Processes (example: Resolved Confirmation). The email templates are defined as part of the One-Step Action. Disable/change when and to whom notifications are sent.
- **Automation Processes:** Enable/disable the Automation Processes that monitor Incidents (example: Monitors for SLA resolve/respond by deadline breaches, automatic notification emails). Consider creating Automation Processes to notify stakeholders of a Major Incident or to coordinate a Major Incident effort.
- **Validated Field values:** Use Table Management to add/edit Lookup Object values to use in drop-down menus (example: Cause Codes).

Incident Features

CSM provides tools to help manage Incidents and Requests, such as forms and dashboards.

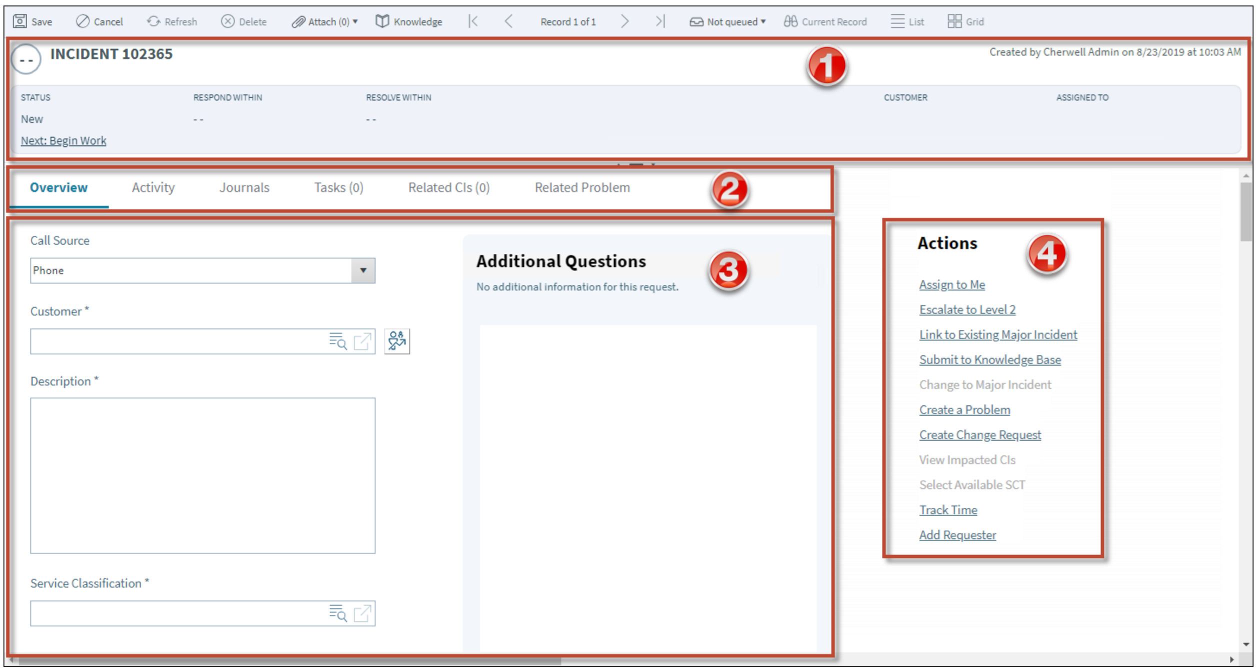
- Incident/Request forms and Specifics forms. See Incident Form and Specifics Forms.
- Journals
- Dashboards. See Incident Dashboards.
- One-Step™ Actions. See Incident One-Step Actions.
- Saved Searches. See Incident Saved Searches.
- Automation Processes. See Incident Automation Processes.
- Reports. See Incident Reports.

Incident Form

Use the Incident and Request forms to create, edit, and track Incidents or Requests.

The forms are similar and are made up of four main areas:

1. Default Form: Displays important at-a-glance information.
2. Form Arrangement: Dynamically displays a tabbed collection of child forms and records that are in a relationship with the Parent Incident form. See Managing Form Arrangements for more information.
3. Form Area: Displays the main form fields.
4. Actions List: Dynamically displays a list of actions that are available for the current Incident.



The following table describes the fields on the form.

Field	Description	Comments
Default Form	Important at-a-glance information, such as Incident ID, response timers, customer contact information, Status bar (current and next Status), and to whom the Incident is assigned.	
Priority	A measure of impact and urgency used to establish timescales and effort to respond to and resolve an issue. See Priority for more information.	
ID	Unique record identifier (example: 10999).	

Field	Description	Comments
Status	Statuses include: • **New:** Incident/Request was created and initial details are being entered. • **Assigned:** Incident/Request has been assigned to a record owner. • **In Progress:** Incident/Request is being investigated/fulfilled by a record owner and/or Task owners. • **Pending:** Incident/Request is temporarily paused (Stop The Clock). • **Resolved:** Incident/Request has been investigated/ fulfilled and is waiting to be closed. • **Closed:** Incident/Request is closed. • **Reopened:** Incident/Request is reopened because the issue was not fixed or reoccurred.	
Next: Status	Select the **links** to move the Incident/Request through the Incident/Request workflow. The Next links include the following statuses: • **Begin Work**: Captures a date-time stamp to track when work began on the Incident/Request. • **Set Pending**: Temporarily pauses the Incident/ Request (Stops the SLA Clock). • **Resolve**: Prompts the user to log the Resolution details (Close Description) and Cause Code. • **Close**: Manually closes the Incident/Request. **Note:** A CSM Automation Process/One-Step™ Action automatically closes Incidents after three (3) days. • **Reopen**: Reopens a Resolved Incident/Request because it was technically not resolved. Restarts the SLA Clock.	For information about One-Step Actions that can be used with the **Next: Status** field, see Incident One-Step Actions.
Response Time	Time remaining to respond to the Incident based on Priority.	
Resolve Time	Time remaining to resolve the Incident based on Priority.	
Requester	Person who submitted the Incident/Request on behalf of the customer. Select to change or remove requester.	
Customer	Person affected by the Incident/Request. Select to change customer.	

Field	Description	Comments
Assigned to	Name of the team member who is working on the Incident. Select the **link** to first select a team and then the assigned user.	
Main Pane	Displays the main form fields. Specifics forms appear when relevant. See Specifics Forms.	
Call Source	Method by which the Incident was delivered. Options include the following sources: • Walk in • Social Media • E-mail • Event • Phone • Portal • Chat Session • Mobile	
Customer	Person affected by the Incident/Request. If the Incident was submitted by another user on behalf of the customer, select **Submit On Behalf Of** to set the requester.	
Description	Description of the Incident/Request.	
Service Classification	Service affected by Incident/Request: • Account Management • Conferencing/Presentation • Desktop Management • E-mail/Calendaring • Employee Support • Enterprise Apps • IT Service Desk • Network Services • Printing • Telephony/Fax • Web Services	You can classify an Incident form by selecting a Service Classification that matches the Service, Category, and Subcategory. For more information, see Service Categorization.
Priority	Indicates the established timescales and effort to respond to and resolve an issue (Incident or Request). Priority is derived from an impact and urgency Priority Matrix.	For more information, see Priority.

Field	Description	Comments
Primary Configuration Item	Displays the main CI that supports this Incident.	For more information, see About CMDB.
Team	Name of the team to which the form is assigned.	
Assign To	Select the **link** to select a user owner for the Incident. The team owner is populated by the selected user owner's default team.	One-Step Action (Assign to ANY Individual): Prompts the user to assign the record to any CSM user (not limited by team). Uses *Owned By ID* and *Owned By Team* Fields.
Actions List	Dynamic display of the actions available for the current Incident.	
Assign to Me	Makes the current user the owner of the Incident. The current user's name appears in **Assigned to** field.	
Escalate to	Assigns next level of severity to the Incident according to the workflow.	
Link to Existing Major Incident	Creates association between current Incident and existing Major Incident.	
Submit to Knowledge Base	Creates a knowledge article with fields assigned relevant information from Incident form.	
Change to Major Incident Change to Incident	Transforms a priority 1 incident into a Major Incident or changes a Major Incident back to an Incident.	A Major Incident can have other Incidents associated to it. When the Major Incident is resolved, the linked Incidents are also closed. A Major Incident has a Linked Incidents tab that displays a list of all Incidents associated with it.
View Impacted CIs	Opens a list of Configuration Items that are affected by the Incident.	
Select Available SCT	Allows you to add tasks from a Service Catalog Template. SCT tasks appear in Tasks tab.	

Field	Description	Comments
Add Requester Remove/Change Requester	Adds a Requester when submitting on behalf of another user or removes or changes the Requester.	After selecting a Requester, prompts the user to select who should receive email notifications. One-Step Action: Prompts the user to change or remove the Requester.
Set to Pending	Stops the progression of Resolve Time. Opens a prompt that requires a reason.	

Related concepts

Create an Incident

Incident One-Step Actions

Incident and Service Request Workflow

Specifics Forms

Specifics forms are context-sensitive forms that are embedded into Incident and Service Request records to capture relevant data for the different Categorizations of Incidents and Service Requests.

For example, different details are needed for a printing Incident than for a new computer request. Using Specifics forms allows the Service Desk to capture the exact data to determine a resolution more quickly by either asking scripted questions to lead to the appropriate answer or capture the correct data for subsequent support teams involved in the functional escalation process.

CSM provides the following default Specifics forms:

Service	Category	Subcategory	Specifics Form
E-mail/Calendaring	(any category)	Submit Incident	E-Mail
Employee Support	Add/Change	Employee Separation	Employee Departure
Employee Support	Add/Change	New Employee Setup	New Employee
Employee Support	Add/Change	Update Employee	Update Employee
Desktop Management	Computer	Request New Computer	New Device
Printing	(any category)	Submit Incident	Printer

Dynamic Specifics Forms

Dynamic Specifics forms allow you to select computer and mobile device accessories on the New Employee and New Device Specifics form.

Users configure the functionality by adding accessory titles and costs to each computer and mobile device item in the Product Catalog Lookup Table. Accessory values dynamically display based on the selected computer or mobile device item.

Define Accessories and Permissions for a Computer CI

Define configurations for a computer CI such as name, cost, and access.

To define accessories for a computer CI:

1. In the CSM Desktop Client menu bar, select **Tools > Table Management**. See CSM Desktop Client menu bar.

   The Table Management interface opens.

2. In the **Type** drop-down, select **Product Catalog**.

   Product catalog items open in the grid.

3. Select a computer item (example: Latitude E5530 Laptop), and then select the **Show Current Record** button.

   The record (example: Product - Latitude E5530 Laptop) opens.

4. Define accessories for the item:
   a. In an accessory field, type the name of the accessory (example: **Carrying Case**).
   b. In the cost field, type the cost of the accessory (example: 59.99).

   Note: You must define accessories for each computer item in your product catalog.

5. Define permissions for who can access the item in the drop-down on the Specifics form:
   a. Select the **Include Specific Departments** link.
   b. Do one of the following to grant permissions to access the item in the drop-down list:
      - Select the **add from list** link to grant permissions to all members of a specific department.
      - Select the **add all departments** link to grant permissions to all members of all company departments.

   Tip: To remove all departments from the list, select the **Clear All** link.

6. Select **Save**.

Define Accessories and Permissions for a Mobile Device CI

Define configurations for a mobile device CI such as name, cost, and access.

To define accessories for a mobile device CI:

1. In the CSM Desktop Client menu bar, select **Tools > Table Management**. See CSM Desktop Client menu bar.

   The Table Management interface opens.

2. In the **Type** drop-down list, select **Product Catalog**.

   Product catalog items open in the grid.

3. Select a mobile device item (example: Apple iPhone 5 32GB), and then select the **Show Current Record** button.

   The record (example: Product - iPhone 5 32GB) opens.

4. Define accessories for the item:
   a. In an accessory field, type the name of the accessory (example: **Phone Case**).
   b. In the Cost Field, type the cost of the accessory (example: $35.00).

   Note: You must define accessories for each mobile device item in your product catalog.

5. Define permissions for who can access the item in the drop-down list on the Specifics form:
   a. Select the **Include Specific Departments** link.
   b. Do one of the following to grant permissions to access the item in the drop-down list:
      - Select the **add from list** link to grant permissions to all members of a specific department.
      - Select the **add all departments** link to grant permissions to all members of all company departments.

   Tip: To remove all departments from the list, select the **Clear All** link.

6. Select **Save**.

Add Accessories to a Computer CI and Mobile Device CI

Add accessories to a new Incident for a new employee setup or new computer request.

To add accessories to a computer CI and mobile device CI:

1. In the CSM Desktop Client, log a new Incident (**New > Incident**).

   A new Incident record is created.

2. Classify the Incident as a new employee setup:
   a. Service Classification: Select **Employee Support > Add/Change > New Employee Setup**.

      The New Employee Specifics form opens.

      Note: The configured computer and mobile device accessory and cost values are also available on the New Device Specifics form. Access the form by classifying the Incident as a Request New Computer (Service Classification: **Desktop Management > Computer > Request New Computer**).

3. In the **computer** section, select an item from the **Computer** drop-down list (example: Latitude E5530 Laptop).

   Note: Your department must have defined permissions to access the item.

   The defined computer accessories display.

   a. Select an accessory check box (example: Carrying Case $59.99).

      The price of the accessory is added to the computer details calculation, and an Ordered [Item] check box displays on the form.

4. In the **Mobile Device** section, select an item from the **Mobile Device** drop-down list (example: iPhone 5 32GB).

   The defined mobile device accessories display.

   a. Select an accessory check box (example: Car Charger $19.95).

      The price of the accessory is added to the computer details calculation, and an Ordered [Item] check box displays on the form.

5. Complete the Incident logging process.

Incident Journals

Each Journal type has its own unique form. Journals are child records, so they are linked to and available from their parent records.

Access Journals by selecting the **Journals** tab in the parent record's arrangement.

CSM provides the following default Incident Journal types:

- **Journal - Note:** Tracks user notes/comments. For example, a user might chronicle troubleshooting progress.
- **Journal - Customer Request:** Tracks Customer requests/comments.
- **Journal - History:** Tracks important field changes. Tracked fields are configurable and are defined in the Business Object definition.
- **Journal - Mail History:** Tracks email correspondence. For example, emails sent for receipt, follow-up, resolution, and questions.
- **Journal - SLM History:** Tracks SLA breaches, warnings, and changes in the pending status for Stop the Clock.
- **Journal - Queue History:** Tracks when records are added to/removed from a Queue. See About Queues.
- **Journal - Remote Support History:** Tracks chat/remote support sessions.

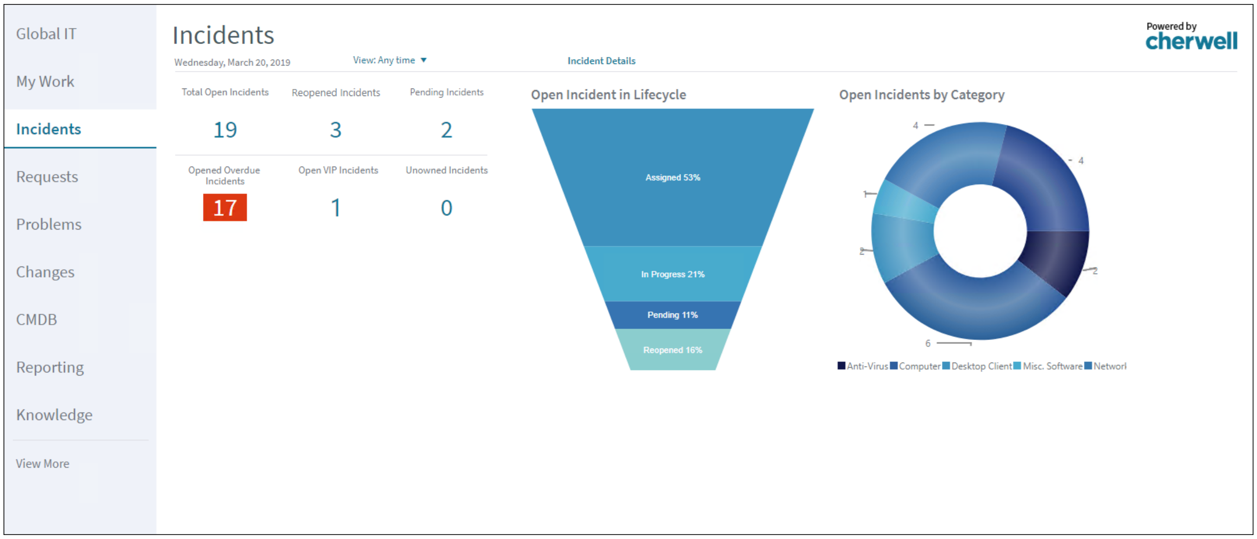
Note: History Journals are automatically created by CSM. Notes are manually created in CSM by selecting **New Journal**. Customer Requests are manually created in the CSM Portal.

Incident Dashboards

CSM provides Incident dashboards to view Incident and Service Request metrics. Use these dashboards to monitor metrics and configure and filter Widgets to customize the display.

Incident Dashboard

CSM provides an Incident dashboard that intuitively organizes your critical Incident metrics into a single, real-time, at-a-glance Incident control panel.



Note: Incidents metrics are also found on other dashboards (example: Global IT and Executive).

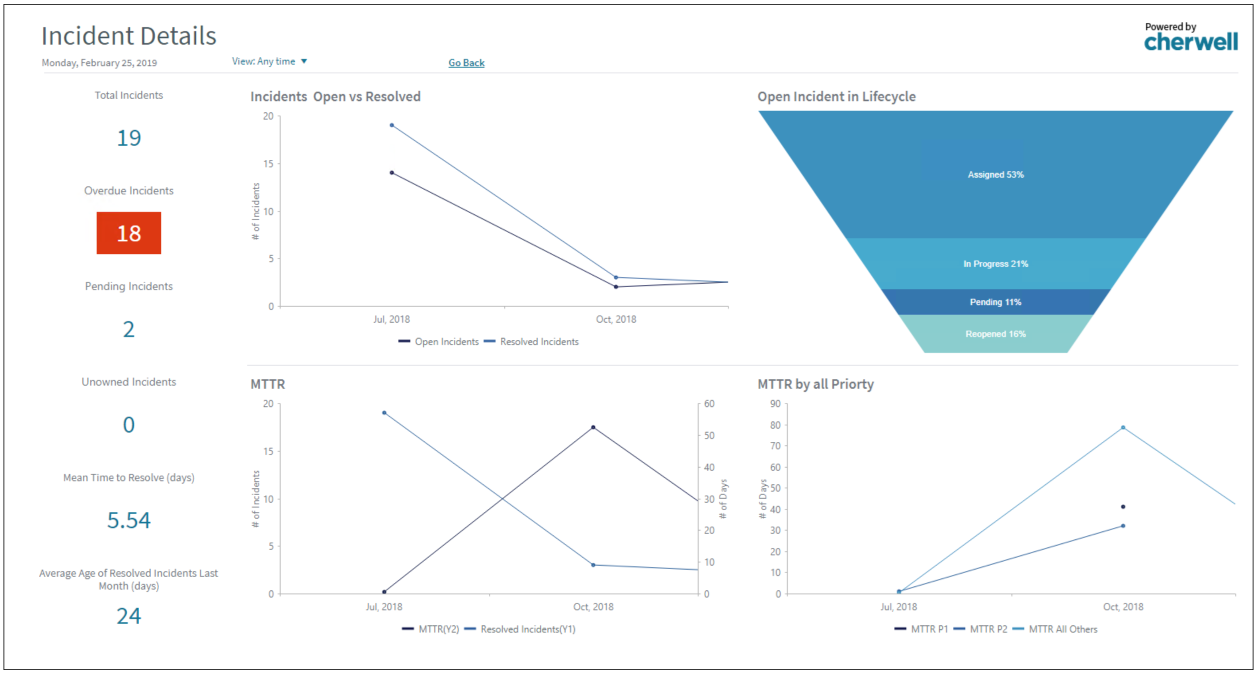
The following table describes the items on the dashboard.

Item	Description	Widget Type	Widget Name	Widget Uses:
Incident Details	Incident Details Dashboard	Link	Incident Details	Open Incident Details dashboard
Total Open Incidents	Number of Open Incidents (Status does NOT = Resolved or Closed).	Text Gauge	Total Open Incidents	Open Incidents Saved Search
Reopened Incidents	Number of Reopened Incidents (Status = Reopened).	Text Gauge	Total Reopened Incidents	Re-Opened Incidents Saved Search
Pending Incidents	Number of Open Incidents (Status = Pending).	Text Gauge	Current Pending Incidents	Pending Incidents Saved Search
Open Overdue Incidents	Number of Open Incidents (Status does NOT = Resolved or Closed) that have not been resolved by the SLA deadline.	Text Gauge	Current Overdue Incidents	Open Overdue Saved Search

Item	Description	Widget Type	Widget Name	Widget Uses:
Open VIP Incidents	Number of Open Incidents (Status does NOT = Resolved or Closed) initiated by a VIP Customer.	Text Gauge	Total Open VIP Incidents	Total Open VIP Incidents Saved Search
Unowned Incidents	Number of Open Incidents (Status does NOT = Resolved or Closed) that have an empty Ownership field.	Text Gauge	CDCurrent Unknown Incidents	Current Unknown Incidents Saved Search
Open Incidents by Category	Percentage of Open Incidents (Status does NOT = Resolved or Closed) by Service Category. Pie slices represent Service Categories.	Pie Chart	Incidents by Category	Open Incident Saved Search
Open Incident Lifecycle	Percentage of Open Incidents (Status does NOT = Resolved or Closed) by Status. Pipeline Slices represent Incident Statuses.	Pipeline Chart	Incident Lifecycle Distribution	Open Incident Saved Search
Filter	Filters the data on the dashboard by time (example: Today, yesterday, within last week).	Filter	CD - Date Filter - 30 day default	

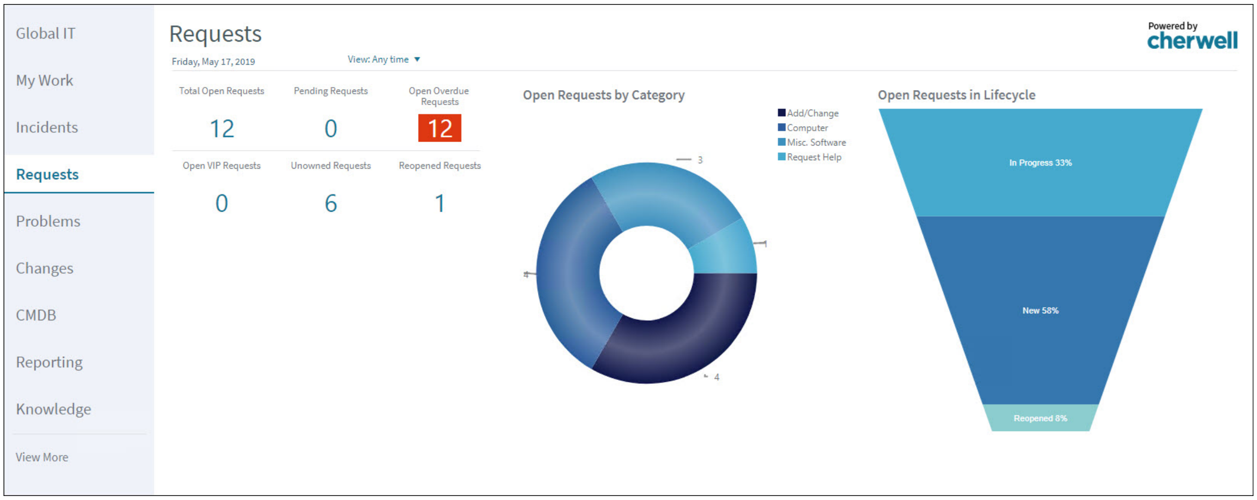
Incident Details Dashboard

CSM provides an Incident Details dashboard that provides more detailed Incident information, including MTTR and lifecycle stats.



Service Request Dashboard

CSM provides a Service Request dashboard that organizes your critical Request metrics into a single, real-time, at-a-glance Request control panel.



Note: Request metrics are also found on other dashboards (example: Global IT and Executive).

The following table describes the items on the dashboard.

Item	Description	Widget Type	Widget Name	Widget Uses:
Total Open Requests	Number of Open Requests (Status does NOT = Closed or Resolved).	Text Gauge	Total Open Requests	Open Requests Saved Search
Pending Requests	Number of Open Requests (Status = Pending).	Text Gauge	Current Pending Requests	Pending Requests Saved Search
Open Overdue Requests	Number of Open Requests (Status does NOT = Closed or Resolved) that have not been resolved by the SLA deadline.	Text Gauge	Current Overdue Requests	Open Overdue Saved Search
Open VIP Requests	Number of Open Requests (Status does not = Closed or Resolved) initiated by a VIP Customer.	Text Gauge	Total Open VIP Requests	Total Open VIP Requests Saved Search
Unowned Requests	Number of Open Requests (Status does NOT = Resolved or Closed) that have an empty Ownership field.	Text Gauge	Unowned Requests	Unowned Requests Saved Search

Item	Description	Widget Type	Widget Name	Widget Uses:
Reopened Requests	Number of Reopened Requests (Status = Reopened).	Text Gauge	Total Reopened Requests	Re-Opened Requests Saved Search
Open Requests by Category	Percentage of Open Requests (Status does NOT = Closed or Resolved) by Service Category.	Pie Chart	Requests by Category	Open Requests Saved Search
Open Requests in Lifecycle	Percentage of Open Requests (Status does NOT = Closed or Resolved) by Status.	Pipeline Chart	Request Lifecycle Distribution	Open Requests Saved Search

Incident One-Step Actions

CSM provides several Incident One-Step Actions to automate tasks.

One-Step Actions	Descriptions Actions	Executed From
Status		
Alt 1 Step from Relationship	Conditionally change the Incident status to next logical status (defined by the Incident status values in Table Management) and/or initiate the next appropriate One-Step Action.	Incident form: Next: <Status>
Alt 2 Step from Relationship	Conditionally change the Incident status to next logical status (defined by the Incident status values in Table Management) and/or initiate the next appropriate One-Step Action.	Incident form: Next: <Status>
Next Step from Relationship	Conditionally change the Incident status to next logical status (defined by the Incident status values in Table Management) and/or initiate the next appropriate One-Step Action.	Incident form: Next: <Status>
Form		
Ownership		
Assign to ANY Individual	Prompts the user to assign the record to any CSM user (not limited by team). Uses Owned By ID and owned by team fields. Changes the Incident status from new to assigned.	Incident form: Assign To link
Assign to Individual	Launches the **Choose Team** window, where a user can choose an owned by team for the record; then, launches the **Choose User** window, where a user can choose a primary user from the already-selected team. Changes the Incident status from new to assigned.	Incident form: Assign To link
Assign to Team	Launches the **Choose Team** window, where a user can choose an owned by team for the record.	Incident form: Team: link
Close Incident	Works with close status. Changes the Incident status from resolved to closed. Prompts the user to fill in resolution notes and cause code if those fields are empty.	Incident form
Reopen Incident	Works with reopen status. Changes the Incident status from resolved to reopened, and clears the resolution fields. Sets the resolved time in minutes and the total STC time in minutes to restart the SLA clock.	Incident form

One-Step Actions	Descriptions Actions	Executed From
Resolve Incident	Works with resolve status. Changes Incident status from in progress to resolved, and then prompts the user for a close description and cause code if those fields are empty. A pop-up message displays if the Incident record has open Tasks associated with it that need to be closed before the Incident is resolved.	Incident form
Set Pending	Works with set pending status. Changes Incident status from in progress or reopened to pending to pause the SLA clock (Stop The Clock). For Incidents in pending status, sets them to their previous status using the **Remove Pending Status** link.	Incident form
Start Work In Progress	Works with begin work status. Tracks the date/time responded and changes the Incident status to in progress. If ownership has not yet been assigned, assigns the Incident to the current user and the team that user belongs to.	Incident form
Take Ownership	Makes the current user the primary user of the record. Changes the Incident status from new to assigned.	Incident form: Assign to Me action
Other		
Nominate for KB	Creates a new Knowledge Article (KA) populated with the description, categorization, and solution/workaround from the Incident. Use to submit information from an Incident record as a KA to the Knowledge Base. A KA is a separate record with its own workflow.	Incident form: Submit to Knowledge Base action
Remove/Change Requester	Launches the **Select an option** window where a user can choose to remove or change the requester.	Incident form: Remove/Change Requester action

A full list of One-Step™ Actions is beyond the scope of this document. Export a schema document from CSM Administrator (**Create a Blueprint > Tools > Export Schema**) to view a full list of One-Step Actions associated with a particular type of Business Object.

Related concepts

About One-Step Actions

Create an Incident

Incident Form

Incident and Service Request Workflow

Action Block Email Templates

Incident Saved Searches

CSM provides numerous Incident saved searches to reuse for common criteria.

For more information, see About Saved Searches.

Saved Search	Returns	Association	Executed From
All Incidents	All Incidents and Requests.	Incident	Search Manager, Widgets
Closed on 1st Call (Incidents and Requests)	Incidents and Requests closed on the first call.	Incident	Search Manager, Widgets
Incidents by Priority	Incidents with a user-selected Priority.	Incident	Search Manager
Incidents Linked to Problem	Open Incidents that are linked to a Problem.	Incident	Search Manager, Widgets
My Open Incidents	Open Incidents owned by me (current user).	Incident	Search Manager, Reports
My Open Incidents and Requests	Open Incidents and Requests owned by me (current user).	Incident	Search Manager, Widgets
My Teams Open Incidents	Open Incidents owned by one of my (current user) teams.	Incident	Search Manager
Open Incidents and Requests	Open Incidents and Requests.	Incident	Search Manager, Widgets
VIP Open Tickets	Open Incidents and Requests that are initiated by a VIP customer.	Incident	Search Manager, Metrics, Widgets
VIP Tickets	All VIP Incidents and Requests.	Incident	Search Manager

Incident Automation Processes

CSM provides the following Incident Automation Processes to automate behavior.

For more information, see Automation Processes.

Name	Description
Incident - Confirmation Email on Create	When an Incident is created, the process initiates the Incident Confirmation One-Step™ Action, which sends the customer an email to confirm their record and provide the Record ID number.
Incident - Not Touched in 3 Days	Waits for the last modified date time field to update. If the field is not updated for three days, the process initiates the SLA Escalate if Not Touched in 3 Days One-Step Action that sends an email to the Incident owner with a reminder to follow up with the customer.
Notify Incident Owner of a new Journal - Note	When a Journal is added to an Incident, the process initiates the Notify Owned By of a New Journal-Note One-Step Action, which sends a notification email to the Incident owner.
Notify Incident Owner of Assignment	When the **Owned By** Field of an Incident changes, the process initiates the Notify Owned By Via E-mail One-Step Action, which sends a notification email to the assigned Incident owner.
Notify Incident Team of Assignment	When the **Owned By Team** Field of an Incident changes, the process initiates the Notify Owned By Team Via E-mail One-Step Action, which sends a notification email to the assigned team.
Resolve By Breached - Incident Changed from Pending	Waits for the resolve by SLA deadline value to pass after the status of an Incident is changed from pending. If it passes, this process sends an email to the manager of the user who owns the Incident and creates a Journal entry to record the breach.
Resolve By Breached - Incident Created	Waits for the resolve by SLA deadline value to pass after an Incident is created. If it passes, this process labels the Incident as breached and sends an email to the manager of the user who owns the Incident.
Resolve By Breached - Incident Reopened	Waits for the resolve by SLA deadline value to pass after an Incident is reopened. If it passes, this process labels the Incident as breached and sends an email to the manager of the user who owns the Incident.
Resolve By Warning - Incident Changed from Pending	Waits for the SLA resolution warning deadline value to pass after an Incident status is changed from pending. If it passes, this process sends an email to the manager of the user who owns the Incident and creates a Journal entry warning that the SLA resolution time is about to breach.
Resolve By Warning - Incident Created	Waits for the SLA resolution warning deadline value to pass after an Incident is created. If it passes, this process sends an email to the manager of the user who owns the Incident and creates a Journal entry warning that the SLA resolution time is about to breach.
Resolve By Warning - Incident Reopened	Waits for the SLA resolution warning deadline value to pass after an Incident is reopened. If it passes, this process sends an email to the manager of the user who owns the Incident and creates a Journal entry warning that the SLA resolution time is about to breach.

Name	Description
Resolved - Calc SLA Good Fields	When the **Status** Field of an Incident changes to resolved, the process uses an expression (SLA calculations) to determine whether the date and time of the resolution is less than or equal to the SLA resolve deadline. **Tip:** Use this Automation Process for report or dashboard metrics.
Resolve to Closed Process	Waits for three days after the status of an Incident is changed to resolved. If the status does not change from resolved, it marks the status as closed.
Respond by Breached - Incident Created	Waits for the respond by SLA deadline value to pass after an Incident is created. If it passes, this process labels the Incident as breached and sends an email to the manager of the user who owns the Incident to notify them of the breach.
Respond by Warning - Incident Created	Waits for the SLA response time value to pass after an Incident is created. If it passes, this process sends an email to the manager of the user who owns the Incident and creates a Journal entry warning that the SLA resolution time is about to breach.
Responded - Calc SLA Good Field	When the status field of an Incident changes from new to work in progress, the process uses an expression (SLA calculations) to determine whether the date and time of the response is less than or equal to the SLA response deadline. **Tip:** Use this Automation Process for report or dashboard metrics.

Incident Reports

CSM provides numerous OOTB Incident Reports, including several Reports with drill-down functionality. Notable Incident Reports include:

Report	Description	Association	Saved Search
Incidents by Owner	Bar chart shows the number of Incidents by CSM User within a User-specified date range. Also lists Incident details.	Incident	Date Range for Report
Incidents by Team	Bar chart shows the number of Incidents by Team within a User-specified date range. Also lists Incident details.	Incident	Date Range for Report
Incidents by Category	Bar chart shows the number of Incidents by Category within a User-specified date range. Also lists Incident details.	Incident	Date Range for Report
Incidents by Priority	Pie chart shows the percentage of Incidents by Priority within a User-specified date range. Also lists Incident details.	Incident	Date Range for Report
Incidents that Occur Most Often	Bar chart shows the top five Incident categories by the number of Incidents within a User-specified date range. Also lists Incident details.	Incident	Date Range for Report
Overdue Incidents	Bar chart shows the number of overdue Incidents by Owner. Also lists Incident details.	Incident	Open Overdue
Top 10 High Volume Customers	Bar chart shows the number of Incidents by Customer within a User-specified date range. Also lists Incident details.	Incident	Date Range for Report
Incident Duration Metrics	Bar charts (each priority (priority 1, priority 2, priority 3) show the number of closed Incidents by duration (days) within a User-specified date range. Also lists Incident details.	Incident	Closed in Date Range
My Open Incidents	Lists open Incidents owned by me (Current User).	Incident	My Open Incidents
My Open Incidents by Category	Lists open Incidents owned by me (Current User) by category.	Incident	My Open Incidents
Condensed High Volume Customers	Drill-down Report. Bar graph shows the top ten Customers based on the number of submitted Incidents within a User-specified date range. Also lists Incident details. Drill down to view the Incidents by clicking a link in the Incident ID column.	Incident	Date Range for Report

Report	Description	Association	Saved Search
Condensed Incident Duration Metrics	Drill-down Report. Three bar graphs (based on Priority) show the number of days required to close Incidents within a User-specified date range. Also lists Incident details. Drill down to view the Incidents by clicking a link in the Incident ID column.	Incident	Closed in Date Range
Condensed Incidents with Longest Duration	Drill-down Report. Bar graph shows the number of days required to close Incidents (by Incident category) within a User-specified date range. Drill down to view the Incidents by clicking a link in the Incident ID column.	Incident	Date Range for Report
Incident List with Audit Trail	Drill-down Report. Lists Incidents and their associated Journal Records within a User-specified date range. Drill down to view the Journals by clicking a link in the Incident ID column. If an Incident does not have any associated Journals, the Incident ID is not be underlined (indicates a link).	Incident	Date Range for Report
Incident List with Task Audit Trail	Drill-down Report. Lists Incidents and their associated Task records within a User-specified date range. Drill down to view the Journals by clicking a link in Incident ID column. If an Incident does not have any associated Tasks, the Incident ID is not be underlined (indicates a link).	Incident	Date Range for Report
Incidents by Source Call	Drill-down Report. Pie chart shows the percentage of Incidents based on the source of the initiation (ex: E-mail, Portal, etc.) within a User-specified date range. Drill down to view the Incidents by clicking a link in the Incident Source column.	Incident	Date Range for Report

Service Portfolio/Service Catalog Management

Service Portfolio management is the process that allows organizations to create and manage a comprehensive set of service offerings for customers.

In CSM, the heart of the Service Portfolio is the Service Catalog. The Service Catalog is imperative to a service desk because it defines and communicates a list of services that an organization provides to its employees or customers.

Each Service in a catalog is defined by:

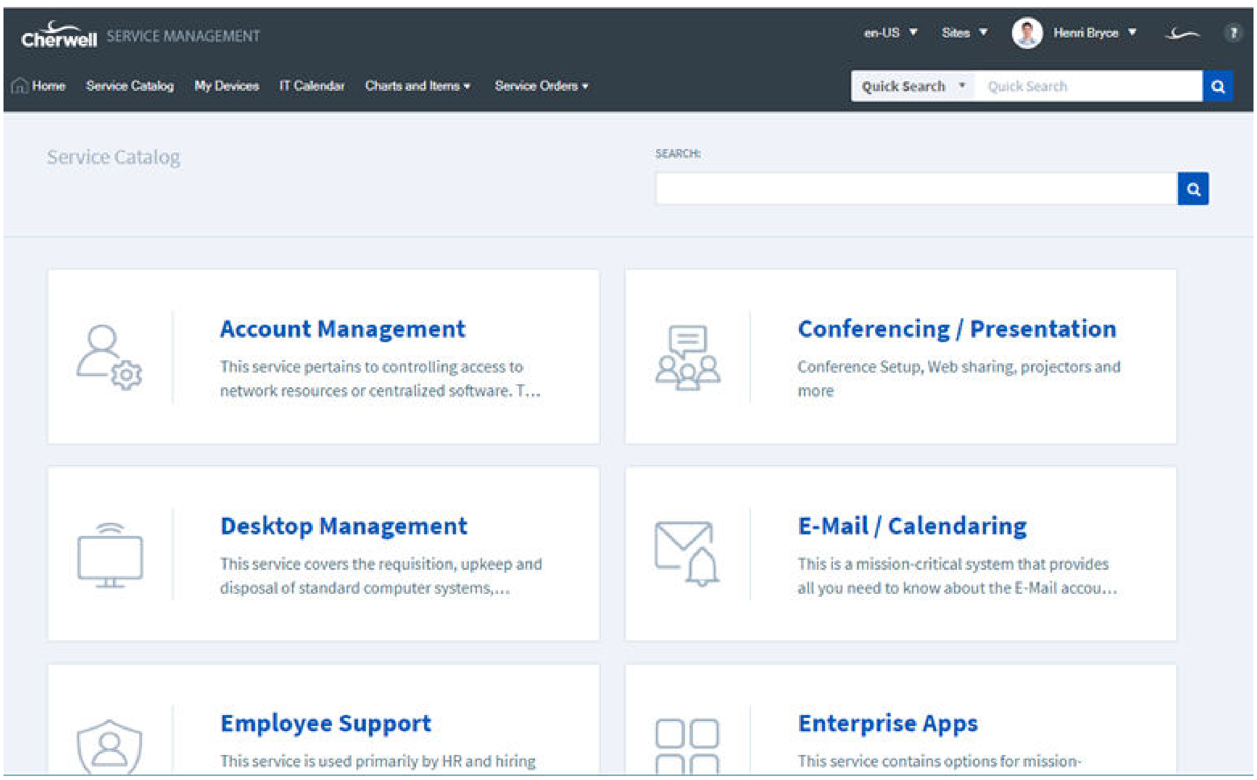
- Basic information: Name, description, status, stakeholders/owners, costs, etc.
- Service Categorization: The service categorization has a three-tiered organization (service, category, and subcategory) that determines the type of support required (Incident or Request), which Specifics form to display to capture the appropriate details, and which Priority Matrix to use.
- SLAs: A Service Level Agreement (SLA) is an agreement between an entity (Customer, Service, or Configuration Item) and a Service Provider that defines response/resolve target times for a service.
- Priority: The priority is used to establish timescales and effort to respond to and resolve an issue (Incident or Request). Priority is derived from an impact and urgency Priority Matrix.

About Services and Service Catalogs

The Service Catalog is imperative to a service desk because it defines and communicates a list of Services that an organization provides to its employees or customers. Each Service in a catalog is defined by:

- Basic information: Name, description, status, stakeholders/owners, costs, etc.
- Service Categorization: The Service categorization has a three-tiered organization (Service, category, and subcategory) that determines the type of support required (Incident or Request), which Specifics form to display to capture the appropriate details, and which Priority Matrix to use.
- SLAs**:** A Service Level Agreement (SLA) is an agreement between an entity (Customer, Service, or Configuration Item) and a Service Provider that defines Response/Resolve target times for a Service.
- Priority: The priority is used to establish timescales and effort to respond to and resolve an issue (Incident or Request). Priority is derived from an impact and urgency Priority Matrix.

To get your service desk started, CSM provides a thorough OOTB Service Catalog (found in the CSM Portal), shown in the following figure.



In CSM, a Service is a Major Business Object. The Service Form defines each Service. For more information about the Service Form, refer to the Service Form documentation.

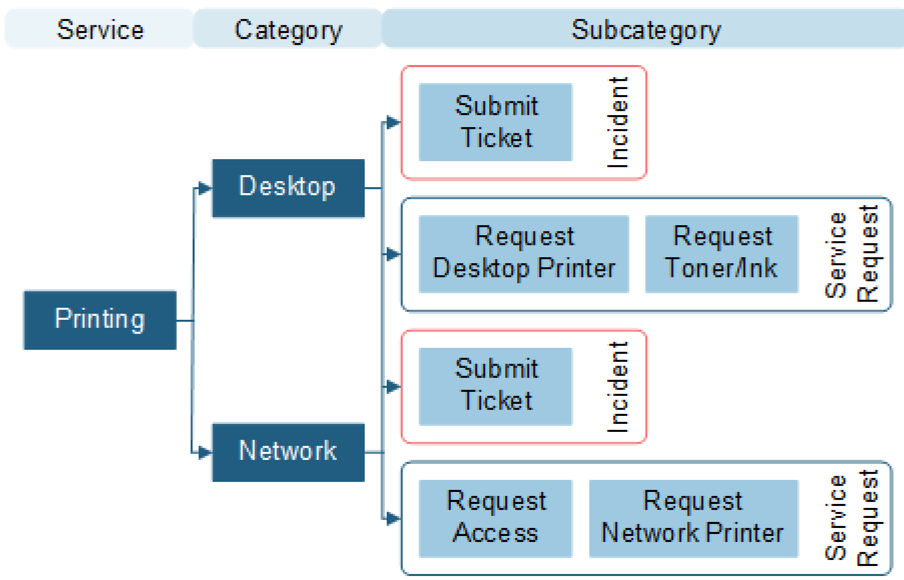
Service Categorization

The Service categorization has a three-tiered organization: Service, category, and subcategory.

The organization determines:

- Which Priority Matrix to use.
- The type of support required (Incident or Service Request).
- Which Specifics form to display to capture the appropriate details.

The following figure shows how the Service, category, and subcategory work together to identify an issue as an Incident or Service Request, and then display the appropriate Specifics form.



The Category and Subcategory forms define your Service categories/subcategories. These forms are child forms, and are linked to and available from their parent Service form (**Category** and **Subcategory** tabs in the Service form's **Arrangement** section).

There are several different Specifics forms. The Subcategory form determines the Specifics form that displays.

Service Good to Know

- Search for one or more Services that meet a specific criteria by running a Quick Search or Search Group.
- The Service categorization has a three-tiered organization (Service, category, and subcategory) that determines the type of support required (Incident or Request), which Specifics form to display to capture the appropriate details, and which Priority Matrix to use.
- CSM provides several OOTB categories and subcategories to use as part of the Service categorization. Use these categories and subcategories as-s, edit them, or create your own using their respective forms in the Arrangement area of the Service Form.
- CSM implements several OOTB Actions/One-Step Actions to make Service management more efficient. For more information about Actions and One-Step Actions, refer to the Actions/One-Step Actions documentation.

OOTB Service Categories and Subcategories

CSM provides the following OOTB Categories and Subcategories.

Service	Category	Subcategory	Incident Type	Specific Form
Account Management	Network Access	Change Password	Request	Standard Details
Account Management	Network Access	New Account	Request	Standard Details
Account Management	Network Access	Password Reset	Request	Standard Details
Account Management	Network Access	New Account	Request	Standard Details
Account Management	Network Access	Remove Access/ Permissions	Request	Standard Details
Account Management	Self Service	Change Password	Request	Standard Details
Account Management	Self Service	New Account	Request	Standard Details
Conferencing/ Presentation	Equipment Request	Request Conference Phone	Request	Presentation
Conferencing/ Presentation	Equipment Request	Request Projector	Request	Presentation
Conferencing/ Presentation	Equipment Request	Request Webcam	Request	Presentation
Conferencing/ Presentation	Video/Audio Conferencing	One-Time Convergence Setup	Request	Presentation
Conferencing/ Presentation	Video/Audio Conferencing	Request Account	Request	Presentation
Desktop Management	Anti-Virus	Request Installation/ Config	Request	Standard Details
Desktop Management	Anti-Virus	Submit Incident	Incident	Standard Details
Desktop Management	Computer	Request Computer Upgrade	Request	Standard Details
Desktop Management	Computer	Request New Computer	Request	Order Computer
Desktop Management	Computer	Request Removal of Computer	Request	Standard Details

Service	Category	Subcategory	Incident Type	Specific Form
Desktop Management	Computer	Submit Incident	Incident	Standard Details
Desktop Management	Misc. Software	Request Installation/ Config	Request	Standard Details
Desktop Management	Misc. Software	Submit Incident	Incident	Standard Details
Desktop Management	OS	Request Upgrade	Request	Standard Details
Desktop Management	OS	Submit Incident	Incident	Standard Details
E-mail/Calendaring	Browser Client	Request Access/ installation	Request	Website Address
E-mail/Calendaring	Browser Client	Submit Incident	Incident	Connectivity
E-mail/Calendaring	Desktop Client	Request Access/ installation	Request	Standard Details
E-mail/Calendaring	Desktop Client	Submit Incident	Incident	Connectivity
E-mail/Calendaring	Mailbox	Request Disk Quote Increase	Request	Request Disk Quota Increase
E-mail/Calendaring	Mailbox	Request Mailbox or Alias	Request	Request Mailbox or Alias
E-mail/Calendaring	Mailbox	Spam Filter request	Request	Spam Filter Request
E-mail/Calendaring	Mobile Client	Request Access/ installation	Request	Standard Details
E-mail/Calendaring	Mobile Client	Submit Incident	Incident	Connectivity
Employee Support	Add/Change	Employee Separation	Request	Employee Departure
Employee Support	Add/Change	New Employee Setup	Request	New Employee
Employee Support	Add/Change	Update Employee	Request	Update Employee
Enterprise Apps	Accounting System	NA	Incident	Standard Details
Enterprise Apps	CRM/Sales Software	NA	Incident	Standard Details
Enterprise Apps	JD Edwards	Convert to Option form	Request	Standard Details
Enterprise Apps	JD Edwards	Submit Incident	Incident	Standard Details
Enterprise Apps	MS Office	NA	Request	Standard Details
Enterprise Apps	MS Office	Submit Incident	Incident	Standard Details

Service	Category	Subcategory	Incident Type	Specific Form
Enterprise Apps	Office Suite	NA	Request	Standard Details
Enterprise Apps	Oracle	Convert to Option form	Request	Standard Details
Enterprise Apps	Oracle	Submit Incident	Incident	Standard Details
Enterprise Apps	PeopleSoft	NA	Request	Standard Details
Enterprise Apps	PeopleSoft	Submit Incident	Incident	Standard Details
Enterprise Apps	SAP	NA	Request	Standard Details
Enterprise Apps	SAP	Submit Incident	Incident	Standard Details
IT Service Desk	Report Outage or Error	NA	Incident	Standard Details
IT Service Desk	Report Outage or Error	Submit Incident	Incident	Standard Details
IT Service Desk	Request Help	NA	Request	Standard Details
IT Service Desk	Request Help	Submit Service Request	Request	Standard Details
Network Services	Backup/Restore	Request Full Restore of backup	Request	Backup/Restore
Network Services	Backup/Restore	Request new backup job	Request	Backup/Restore
Network Services	Backup/Restore	Request restore of files	Request	Backup/restore
Network Services	Fileserver	Request File Share	Request	Request File Share
Network Services	Fileserver	Request increase in disk quota	Request	Request Increase in Disk Quota
Network Services	Physical Wires	Request new wiring	Request	Request New Wiring
Network Services	Physical Wires	Request relocation or wiring	Request	Request Relocation of Wiring
Network Services	Physical Wires	Submit Incident	Incident	Standard Details
Network Services	Wireless	Request Access	Request	Request Access
Network Services	Wireless	Submit Incident	Incident	Standard Details
Printing	Desktop	Request desktop printer	Request	Printer Order Form
Printing	Desktop	Request toner/ink	Request	Toner Order Form
Printing	Desktop	Submit Incident	Incident	Print Incident
Printing	Network	Request access to network printer	Request	Request Access to Network Printer

Service	Category	Subcategory	Incident Type	Specific Form
Printing	Network	Request new network printer	Request	Printer Order Form
Printing	Network	Request toner/ink	Request	Toner Order Form
Printing	Network	Submit Incident	Incident	Print Incident
Telephony/Fax	Call Center Telephony	Move/add/change user or queue	Request	Standard Details
Telephony/Fax	Call Center Telephony	Request ACV/IVR change	Request	Standard Details
Telephony/Fax	Call Center Telephony	Submit Incident	Incident	Phone/Fax Incident
Telephony/Fax	Desktop Telephone	Request telephone	Request	Standard Details
Telephony/Fax	Desktop Telephone	Submit Incident	Incident	Phone/Fax Incident
Telephony/Fax	Fax	Request FAX hardware	Request	Standard Details
Telephony/Fax	Fax	Request FAX software	Request	Standard Details
Telephony/Fax	Fax	Request FAX toner/ink	Request	Standard Details
Telephony/Fax	Fax	Submit Incident	Incident	Phone/Fax Incident
Telephony/Fax	Mobile Telephone	Request telephone	Request	Standard Details
Telephony/Fax	Mobile Telephone	Submit Incident	Incident	Phone/Fax Incident
Web Services	Internet	Request new page or site	Request	Request New Page or Site Specifics Screen
Web Services	Internet	Request update to page or site	Request	Request New Page or Site Specifics Screen
Web Services	Internet	Submit Incident	Incident	Standard Details

Service Level Agreements (SLAs)

A Service Level Agreement (SLA) is an agreement between an entity (Customer, Service, or Configuration Item) and a service provider that defines Response and Resolve target times for a Service. SLAs can be a formal agreement between an organization and its customers, or a guide for technicians.

The SLA is the technician's guarantee to the customer saying, "I will respond to you within [a specified period of time]," and "I will provide a solution for your issue within [a specified period of time]." SLA is one of the most important metrics for ITSM, in addition to being one of the benchmarks for success.

In CSM, an SLA is a Major Business Object. The SLA form defines and manages the SLA.

Good to Know

- As configured OOTB, SLA selection is Time-Based. Tickets automatically select the shortest SLA time to apply.
- SLA uses technician working hours as its reference point, unless it is configured to use 24/7. At the time a customer submits a ticket, the SLA checks to see if technician working hours are currently active. If they are not, the deadline calculation will not start until the technician working hours are in effect again.
- Organizations that span many time zones, or where customer working hours differ significantly from technician working hours, should set SLAs in hours (example: 24 hours) rather than days (example: 1 day) to account for different day start and stop times.
- The **Preview** link under the **Actions** list on the SLA form allows you to propose hypothetical ticket situations to see what SLA deadlines look like with the current SLA is applied. Keep in mind that this tool does not account for differences in working hours, so it reflects situations where the customer and the technician share the same working hours.

Related concepts

How SLA Deadlines are Calculated

SLA Working Hours

SLA Models

CSM provides two types of SLA models: Time-Based Model and Hierarchy-Based Model.

Note: Changing the SLA model only affects Incidents and Service Requests created after the model is selected, so we recommend choosing a model during initial implementation.

Time-Based Model

In OOTB content, SLAs select based on the Time-Based Model, which takes the soonest deadline for any SLAs associated to the ticket.

If you use the Time-Based model, CSM calculates, in real time, which SLA results in the earliest resolution deadline and uses that in the event there are multiple SLAs present. The shortest SLA is then applied to the resolution and response deadlines.

Hierarchy-Based Model

In the event of multiple SLAs, CSM chooses the SLA type that is highest in the following hierarchy (provided the necessary overrides are in place):

- **Config Item**: SLAs for Configuration Items (CIs), typically based on criticality (example: Primary Server). A Config Item SLA overrides every other SLA.
- **Service**: SLAs for a Service, typically based on criticality (example: Email service is really important). A Service SLA overrides a Customer and Corporate SLA. Not many Services require a special SLA. In the OOTB system, only Desktop Management and E-mail Calendaring have their own SLAs.
- **Customer**: SLAs for customer levels, typically based on employee status (Platinum, Gold, Silver, Bronze). A Customer SLA overrides a Corporate SLA.
- **Corporate (default)**: Default SLA. Many organizations use only this SLA type.

See SLA and Priority for Response/Resolve Target Times by Work Hours and Priority.

SLA Target Times

SLA Target Times calculate the duration of time in which a technician must resolve or respond to a ticket.

SLA Target Times can be set in days, hours, or minutes. They can either allow or not allow Stop the Clock. Target Times can also be tied to a Working Hours calendar. They define the behavior of an SLA and are based on:

- **Priority**: A P1 should have faster target times than a P5.
- **Record Type**: A disruption (Incident) should have faster target times than a Request.
- **SLA Type**: SLAs can be bound to a customer, a service, and a CI. A critical CI (server) should have faster target times than a non-critical system.

Use this comprehensive processing to ensure that Incidents and Requests involving customers, services, and CIs are appropriately serviced according to the needs of your organization.

For example, set a Resolve Target Time of 90 hours for a P3 Corporate Request, such as a software upgrade. Consider a faster resolve time (example: Eight hours) for executives. Reserve your most aggressive Respond target times (example: Five minutes) for a critical P1 Config Item Incident, such as the primary server going down.

Note: See SLA and Priority for Response/Resolve Target Times by Work Hours and Priority.

Related concepts

Stop the Clock

SLA Working Hours

Stop the Clock

Stop the Clock (STC) is a feature in OOTB SLA calculations that allows the technician to pause the SLA clock while the ticket is in Pending status.

Use the STC status when the technician is waiting on information from the customer, the customer is unavailable, the ticket requires completion of a Change Request, or other reasons. It may be appropriate to allow this time to delay the SLA deadline, depending on the urgency of the SLA. Manage whether an SLA uses STC by selecting the **Allow "Stop the Clock"** check box under **Advanced Options** in the SLA form.

SLA Working Hours

Working Hours define the calendar by which the SLA deadlines are calculated.

Use Working Hours to determine when time counts towards the SLA deadline and when it does not. Manage these in the Business Hours Manager (in the CSM Administrator **Managers** menu).

Customer and Technician Working Hours

By default, the OOTB SLA configuration uses either a 24/7 calendar or the working hours of the technician (8-5 calendar on the same time as the CSM server). When the ticket is created, the customer's working hours are considered; however, they are not the frame of reference for the OOTB SLA deadlines. Consideration of the customer's working hours is limited to a match/no match determination, which helps CSM decide whether to start the clock (if the customer's hours match the technician's) or wait until the technician's working hours (if they do not match the customer's).

If you prefer, you can add the customer's working hours calendar and configure the SLAs to adhere to those instead.

SLA and Priority

The SLA and Priority data describes the OOTB Hierarchy-Based Model SLAs. SLAs are listed hierarchically by SLA type, and show Response/Resolve Target Times by Work Hours and Priority.

Note: For 24/7 support, resolution Target Times can be expressed in days, hours, or minutes.

Table 1. Config Item SLA for Primary Server

Description	Type	Target Time: Work Hours	Target Time: Priority	Target Time: Response	Target Time: Resolve
For the server that runs many of the mission-critical applications	Standard	Incidents: 24 x 7	1	5 mins	1 hr
			2	5 mins	2 hrs
			3	10 mins	3 hrs
			4	15 mins	4 hrs
		Service Requests: 8-5 Monday-Friday	1	10 mins	2 hrs
			2	15 mins	3 hrs
			3	20 mins	4 hrs

Table 2. Service SLA for Email Service

Description	Type	Target Time: Work Hours	Target Time: Priority	Target Time: Response	Target Time: Resolve
For Email Service provided for the entire organization	Email/ Calendaring	Incidents: 24 x 7	1	15 mins	2 hrs
			2	15 mins	4 hrs
			3	30 mins	6 hrs
			4	30 mins	8 hrs
		Service Requests: 8-5 Monday-Friday	1	1 hr	6 hrs
			2	2 hrs	1 day
			3	4 hrs	3 days

Table 3. Customer SLA for Platinum Level

Description	Type	Target Time: Work Hours	Target Time: Priority	Target Time: Response	Target Time: Resolve
For VIP customers (must be director or above)	Standard	Incidents: 24 x 7	1	15 mins	2 hrs
			2	15 mins	4 hrs
			3	30 mins	6 hrs
			4	30 mins	8 hrs
		Service Requests: 8-5 Monday-Friday	1	1 hr	2 hrs
			2	2 hrs	3 hrs
			3	4 hrs	4 hrs

Table 4. Customer SLA for Gold Level

Description	Type	Target Time: Work Hours	Target Time: Priority	Target Time: Response	Target Time: Resolve
For IP customers (example: Sales and IT department)	Standard	Incidents: 24 x 7	1	30 mins	3 hrs
			2	30 mins	8 hrs
			3	1 hr	12 hrs
			4	3 hrs	16 hrs
		Service Requests: 8-5 Monday-Friday	1	1 hr	4 hrs
			2	2 hrs	12 hrs
			3	4 hrs	16 hrs

Table 5. Customer SLA for Silver Level

Description	Type	Target Time: Work Hours	Target Time: Priority	Target Time: Response	Target Time: Resolve
For managers and supervisors.	Standard	Incidents: 24 x 7	1	1 hr	5 hrs
			2	1 hr	1 day
			3	2 hrs	2 days
			4	2 hrs	3 days
		Service Requests: 8-5 Monday-Friday	1	2 hrs	2 days
			2	2 hrs	5 days
			3	1 day	10 days

Table 6. Customer SLA for Bronze Level

Description	Type	Target Time: Work Hours	Target Time: Priority	Target Time: Response	Target Time: Resolve
For the accounting department	Standard	Incidents: 24 x 7	1	45 mins	5 hrs
			2	45 mins	1 day
			3	2 hrs	2 days
			4	5 hrs	3 days
		Service Requests: 8-5 Monday-Friday	1	75 mins	4 hrs
			2	2 hrs	2 days
			3	3 hrs	5 days

Table 7. Corporate SLA for Corporate

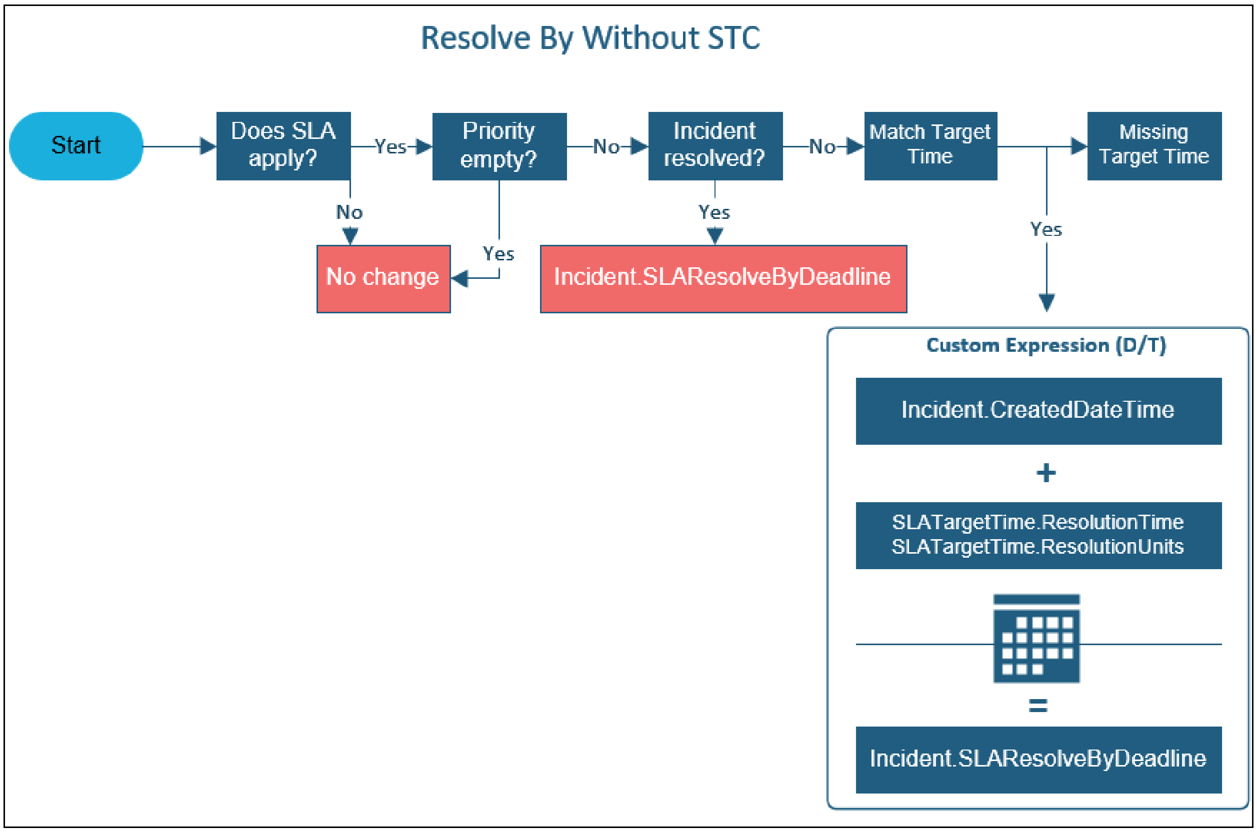
Description	Type	Target Time: Work Hours	Target Time: Priority	Target Time: Response	Target Time: Resolve
Default for all customers who are not entitled to a Customer Service Level	Standard	Incidents: 24 x 7	1	1 hr	5 hrs
			2	1 hr	2 days
			3	2 hrs	3 days
			4	2 hrs	5 days
			5	2 hrs	9 days
		Service Requests: 8-5 Monday-Friday	1	2 hrs	2 days
			2	2 hrs	5 days
			3	1 day	10 days

How SLA Deadlines are Calculated

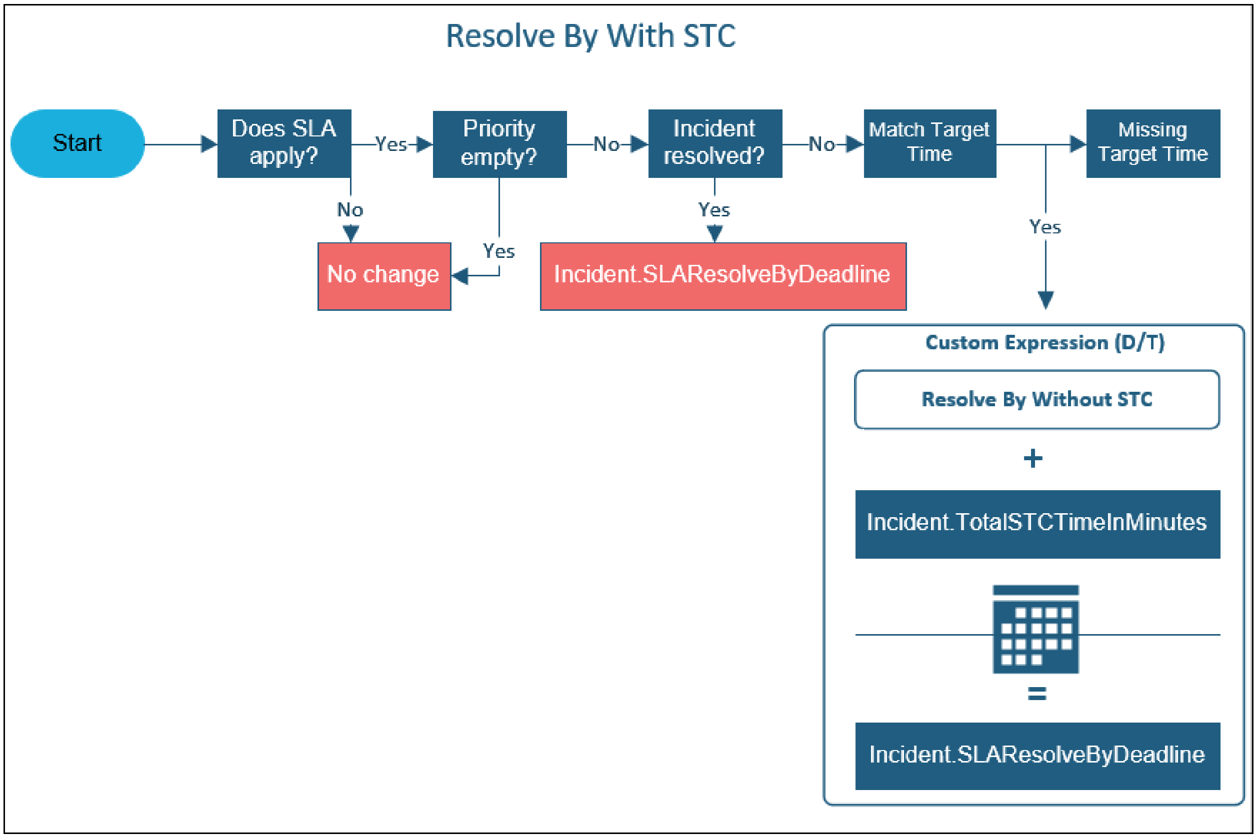
The two processes to calculate SLA deadlines are Resolve By Without STC and Resolve By With STC.

Note: *Respond By* and *Resolve By* deadlines are calculated using different expressions that work essentially that same way on different objects (the name and relevant deadline are different). This topic provides calculations for *Resolve By* deadlines as an example.

The Resolve By Without STC flowchart shows the process for how timelines are calculated for SLAs that do not allow Stop the Clock.



The Resolve By With STC flowchart describes the process for how timelines are calculated for SLAs that allow Stop the Clock. It is based on the result of the *Resolve By Without STC* expression shown above.

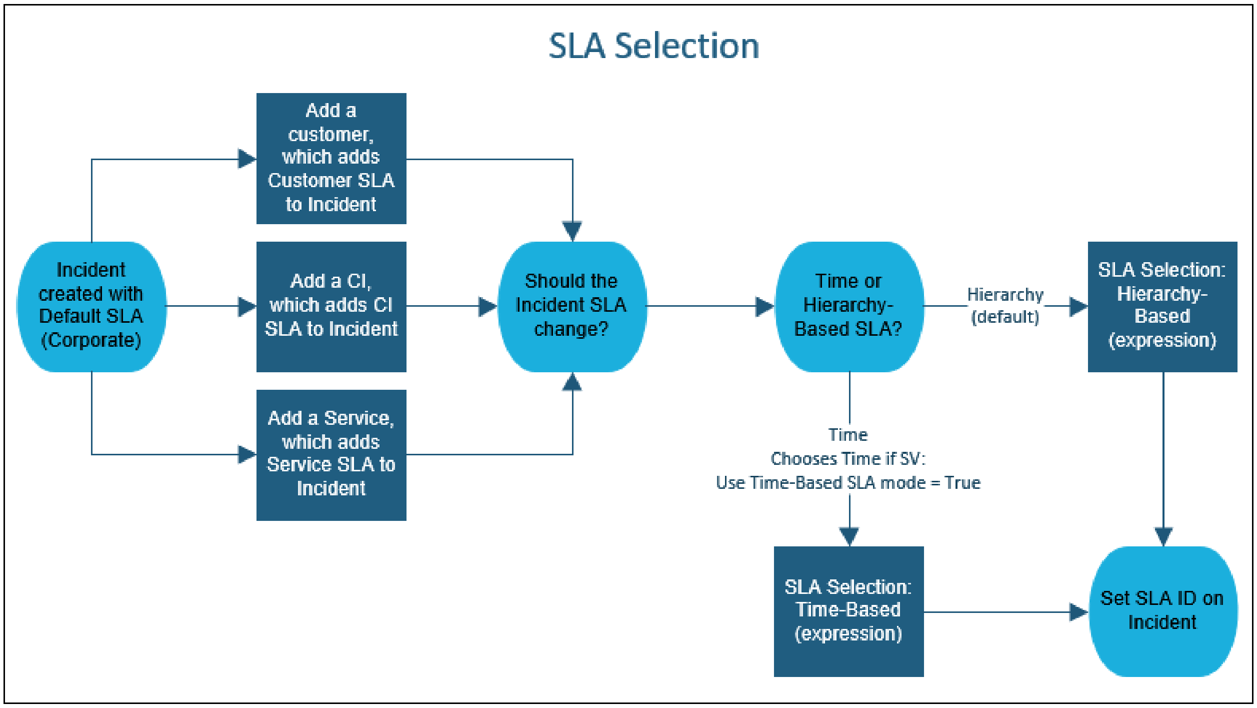


Each of the SLA deadline calculations consider Working Hours as specified in the SLA itself. See SLA Working Hours.

How SLAs are Selected

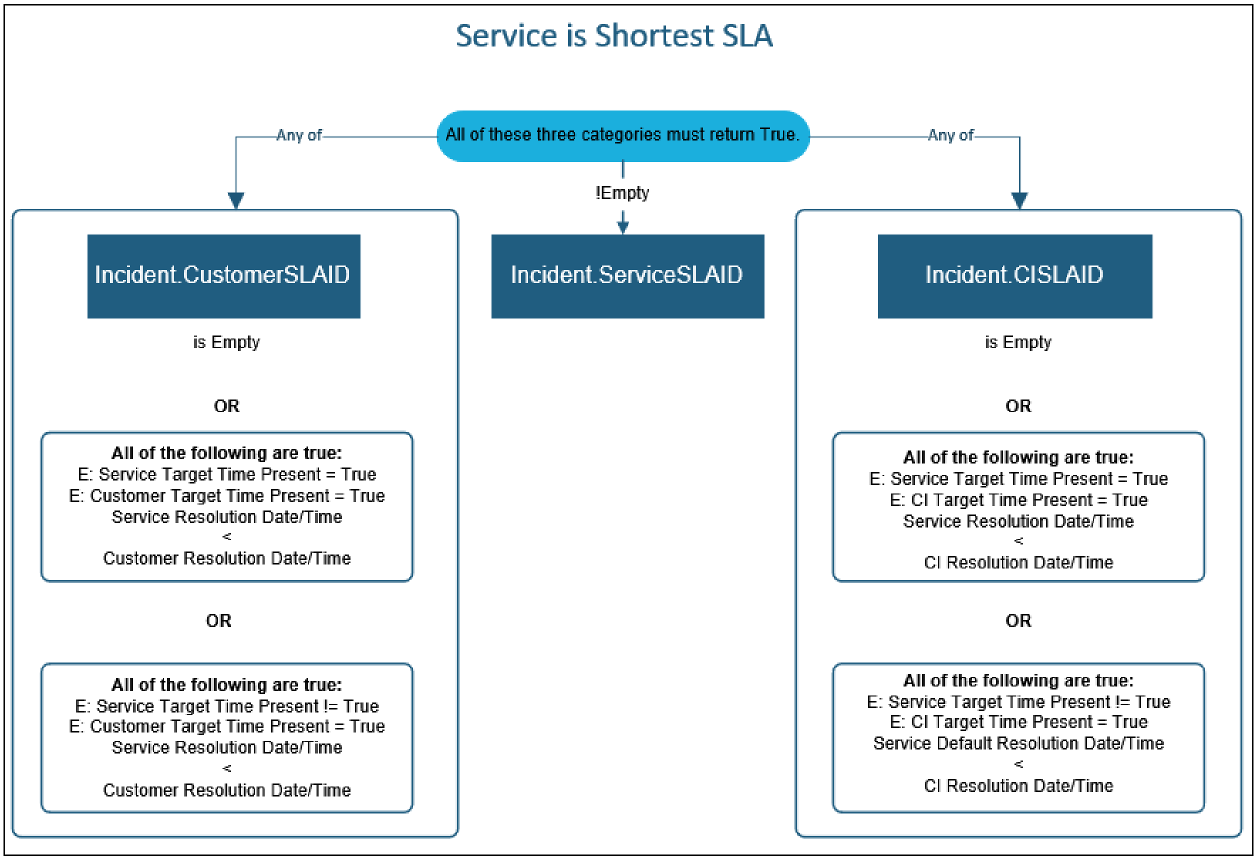
SLAs are selected based on the time, type, and number of SLAs.

The SLA Selection flowchart describes the process for how CSM determines the Incident SLA.



Note: In OOTB content, the stored variable **Use time-based SLA mode** is set to **True** so OOTB SLAs select based on the shortest amount of time for any associated SLAs.

The Service is Shortest SLA flowchart describes the decision-making process to determine that Service is the shortest SLA. Other SLA types use a similar workflow.



- In the Time-Based Model, this is one sample expression that returns *true* if service is the shortest SLA. Every SLA type has a similar expression.
- When a ticket is created, CSM uses a selection model to ensure the shortest SLA applies. You can also set the system to use the Hierarchy-Based Model, where specific SLA types win out.

OOTB SLAs

The SLA Model and the SLA/Priority Spreadsheet define OOTB SLAs.

OOTB SLAs are configured as an example SLA setup. They use a Time-Based SLA model and contain many different SLA types (CI, Customer, Service, and Corporate). If you use the OOTB SLAs, the following apply:

- Incident and Service Requests use the Priority Matrix as configured OOTB.
- Stop the Clock (STC) is allowed for some less critical SLAs, as indicated.
- The Automation Process server is set up and emails are customized (used in Warning and Breach notifications).
- The customer's working hours match the technician's, or if they do not match, the technician's hours take priority.

Related concepts

Stop the Clock

SLA Working Hours

SLA Forms

Manage SLA forms in CSM Administrator through the SLA Business Object. The SLA form displays when you create a new (or modify an existing) SLA in the CSM Desktop Client or CSM Browser Client.

These SLA forms are available OOTB:

- Edit
- Preview
- SLA
- SLA Overview
- SLA Summary

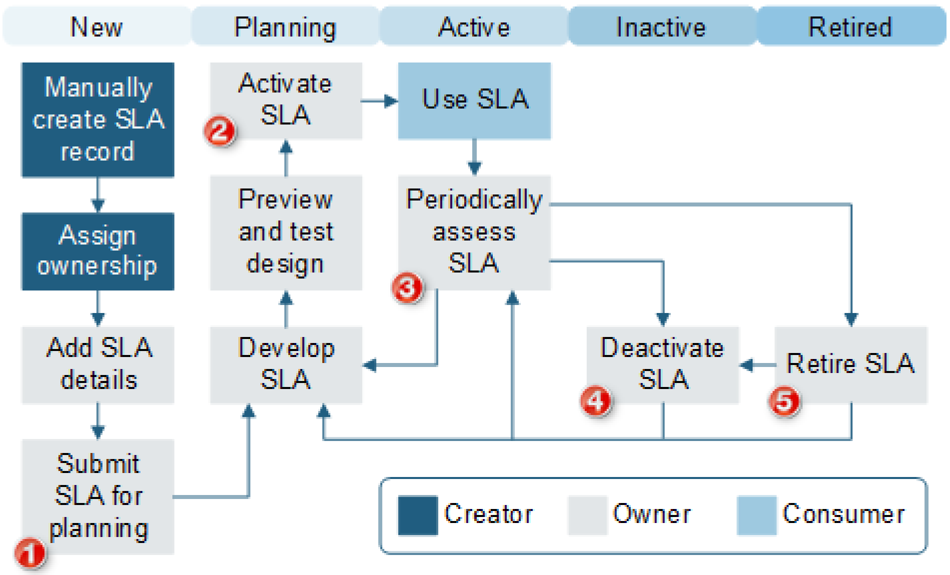
To manage SLA forms:

1. In CSM Administrator, select **Create a New Blueprint**.
2. Select the **SLA** Business Object, and then select **Edit Form**.
3. Under **SLA forms**, select the form you wish to manage.
4. Make any necessary changes.
5. Save the form and publish the Blueprint.

Related concepts
Manage SLA Forms
Related tasks
Create SLAs

SLA Lifecycle

The OOTB system SLA lifecycle consists of phases from New through Retired. SLA forms and One-Step™ Actions enhance the workflow.



1	A One-Step Action changes the status to Planning.
2	A One-Step Action changes the status to Active.
3	When periodically assessing, the owner can revise, deactivate, or retire the SLA. • Revise: a One-Step Action changes the status back to Planning. • Deactivate: a One-Step Action changes the status to Inactive. • Retire: a One-Step Action changes the status to Retired.
4	When deactivated, the owner can revise, reactivate, or retire the SLA. • Revise: a One-Step Action changes the status back to Planning. • Reactivate: a One-Step Action changes the status back to Active. • Retire: a One-Step Action changes the status to Retired.
5	When retired, the owner can revise or reactivate the SLA. • Revise: a One-Step Action changes the status back to Planning. • Reactivate: a One-Step Action changes the status back to Active.

Note: CSM uses several features to enhance the SLA workflow (example: The SLA form helps create and manage SLAs and One-Step Actions help move the SLA through its workflow).

Contributors

The SLA typically involves the following contributors. Depending on the workflow and the size of your company, the creator and owner might be the same person.

- Creator: User that creates the SLA. This is typically a member of the Services team.
- Owner: User that manages the SLA. This is typically a member of the Services team.
- Consumer: Person that uses the SLA. This is typically a customer or user (technician) logging a record.

Phases

The SLA workflow is broken down into the following phases:

1. **New:** Creator creates a new SLA and assigns ownership. Then, the owner defines the initial details and submits the SLA for planning/development.
2. **Planning (Development):** Owner develops the SLA, including Target Times and Priority Matrix Elements. When ready, the owner activates the SLA.
3. **Active:** SLA is operational in a live environment. Owner periodically assesses the SLA (SLA can be sent back for review/rework or retired, if necessary).
4. **Inactive:** SLA is temporarily out of use. Owner periodically assesses the SLA (SLA can be sent back for review/rework or retired, if necessary).
5. **Retired:** Expired/out-of-date SLA is retired. Owner can send the SLA back for review/rework, if necessary.

Create SLAs

Create an SLA to define times for a Service and use as a metric and benchmark.

Use the following guidelines to help you create an SLA:

- SLA Lifeclycle
- Define SLA Target Times
- Check for Errors

To create a new SLA:

1. In the CSM Desktop Client or CSM Browser Client, select **New > New SLA**.
2. Add a title and select a subscription level (optional).
3. Select an SLA type and add a description (optional).
4. (Optional) Add a scope and select a priority group
5. (Optional) Select start and end dates, and then select a review date.
6. (Optional) Select any preferred options under the **Advanced Options** section (example: Select the **Allow "Stop The Clock"** check box).
7. (Optional) Select any links under the **Actions** list (example: **Activate This SLA**).
8. Use the **SLA Target Times** tab to define SLA target times.
9. Use the **Priority Matrix Elements** tab to define the Priority Matrix Elements.
10. (Optional) Select the **Preview** link under the **Actions** list to propose hypothetical ticket situations to see what SLA deadlines would look like with the current SLA applied. Keep in mind that this tool does not account for differences in working hours, and so it best reflects situations where the customer and the technician share the same working hours.
11. Select **Save**.

Related concepts

SLA Lifecycle

Check for Errors

Priority Matrix Element Form

Related tasks

Define SLA Target Times

Define SLA Target Times

Define SLA Target Times based on priority level and record type.

To define SLA target times:

1. Create a new SLA or use the Search Manager to open an existing one.
2. If needed, edit any SLA fields.
3. Select the **SLA Target Time** tab.
4. Select **New SLA Target Time** or select an existing SLA Target Time (example: Priority 1 Incident).
   The SLA Target Time form opens to the right of the grid.
5. Select **Step 1: Priority**, and then choose the priority level and record type (example P1, Incident).
6. (Optional) Select **Step 2: Hours**, and then select the business hours to use.
   a. (Optional) Select the **Yes, use as default** check box to use as the default target time.
7. (Optional) Select **Step 3: Response**, and then provide the target number of days, hours, or minutes to respond to the Incident/Service Request.
   The response time must be shorter than the maximum time limits of the Operational Level Agreements (OLAs) and Underpinning Contracts (UCs) linked to the SLA. If the response time is too short, a warning icon appears.
   a. Select the option to set response deadline to be constrained to specific business hours.
      If you selected **Yes**, select the business hours to use.
   b. Provide the number of days, hours, or minutes for the warning before the response deadline.
      The warning time must be shorter than the response time. If it is not, a warning icon appears.
8. Select **Step 4: Resolution**, and then provide the target number of days, hours, or minutes to resolve the Incident/Service Request.
   The resolution time must be shorter than the maximum time limits of the Operational Level Agreements (OLAs) and Underpinning Contracts (UCs) linked to the SLA. If the resolution time is too short, a warning icon appears.
   a. Select the option to set response deadline to be constrained to specific business hours.
      If you selected **Yes**, select the business hours to use.
   b. Provide the number of days, hours, or minutes for the warning before the response deadline.
      The warning time must be shorter than the response time. If it is not, a warning icon appears.
9. Select **Review** to review the target time fields.
10. Select **Save**.
    The new target time appears in the SLA Target Times Tab.

Related concepts

Run a Saved Search

Target Times Form

Related tasks

Create SLAs

Check for Errors

Use the Check for Errors One-Step™ Action to test SLAs in CSM.

Due to the complex, data-driven nature of SLAs, CSM incorporates a One-Step Action to help mitigate errors that you may encounter when you create or configure an SLA.

Note: The error-checking mechanism may not catch every error. It should not be used as a guarantee but rather as a supplement to thorough SLA design and implementation.

Use one of the following ways to initiate error checking:

- On the SLA form, select the **Check for Errors** link in the **Actions** list.
- On the SLA form, select the **Check For Errors On Save** check box under **Advanced Options**, and then save the record.

Check for Errors One-Step Action:

1. Setup Error Testing: The first step of the One-Step Action clears out the temporary fields that are used during the rest of the process.
2. Check Incident Target Times: Next, the One-Step Action verifies that for every SLA target time for Incident there is exactly one default. If no defaults are present, the system does not know how to handle exceptional cases in which an Incident is created outside of the business hours that the SLA target times are set up for. Additionally, more than one default would be ambiguous leading to unpredictable results.
3. Check Service Request Target Times: The same checks that are performed against the Incident SLA target times are performed against the Service Request SLA target times.
4. Incident Matrix Matching: This step verifies that for each Incident priority available via the priority matrix, there is a corresponding SLA target time to handle that given priority. If any discrepancies are found, they are added to the list of errors to be displayed at the end of the error checking.
5. Service Request Matrix Matching: This step tests for consistency between the Priority Matrix Elements (PMEs) and SLA target times for Service Requests.
6. Check Response vs. Resolution: This step makes a quick pass through all SLA target times and compares the response and resolution times. If the response time is greater than the resolution time, an error is displayed.
7. Display Results: Finally, a popup is displayed showing any errors found or a confirmation that no errors were found.

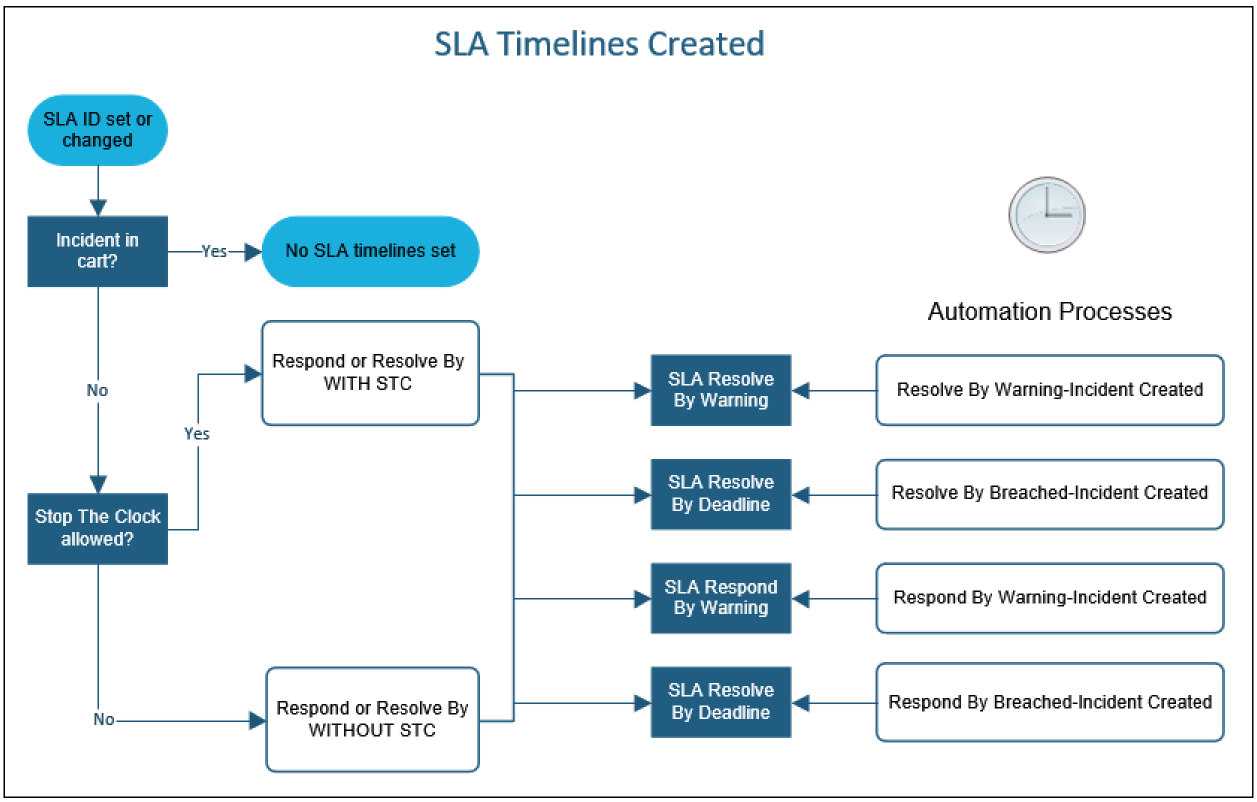
Apply SLAs

To apply an SLA, create an Incident with a default SLA. CSM uses this process to initially set the timelines for the SLA and then determines whether or not the default SLA should update as more information is added to the ticket.

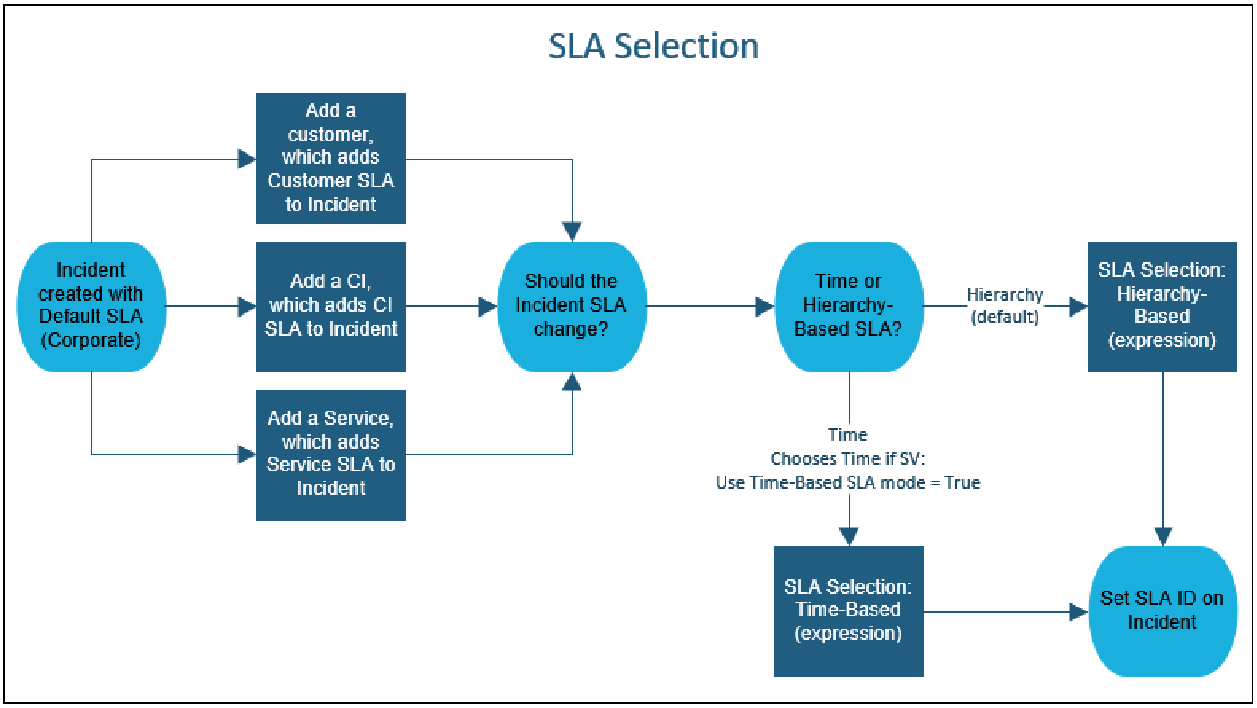
How SLAs are applied

- Incidents are created with a default SLA (OOTB = Corporate).
- Application is based on the SLA that wins the selection process.
- If an element is added to the ticket that has a SLA tied to it, CSM checks to see whether the default SLA should update, and change if needed (SLA Selection).

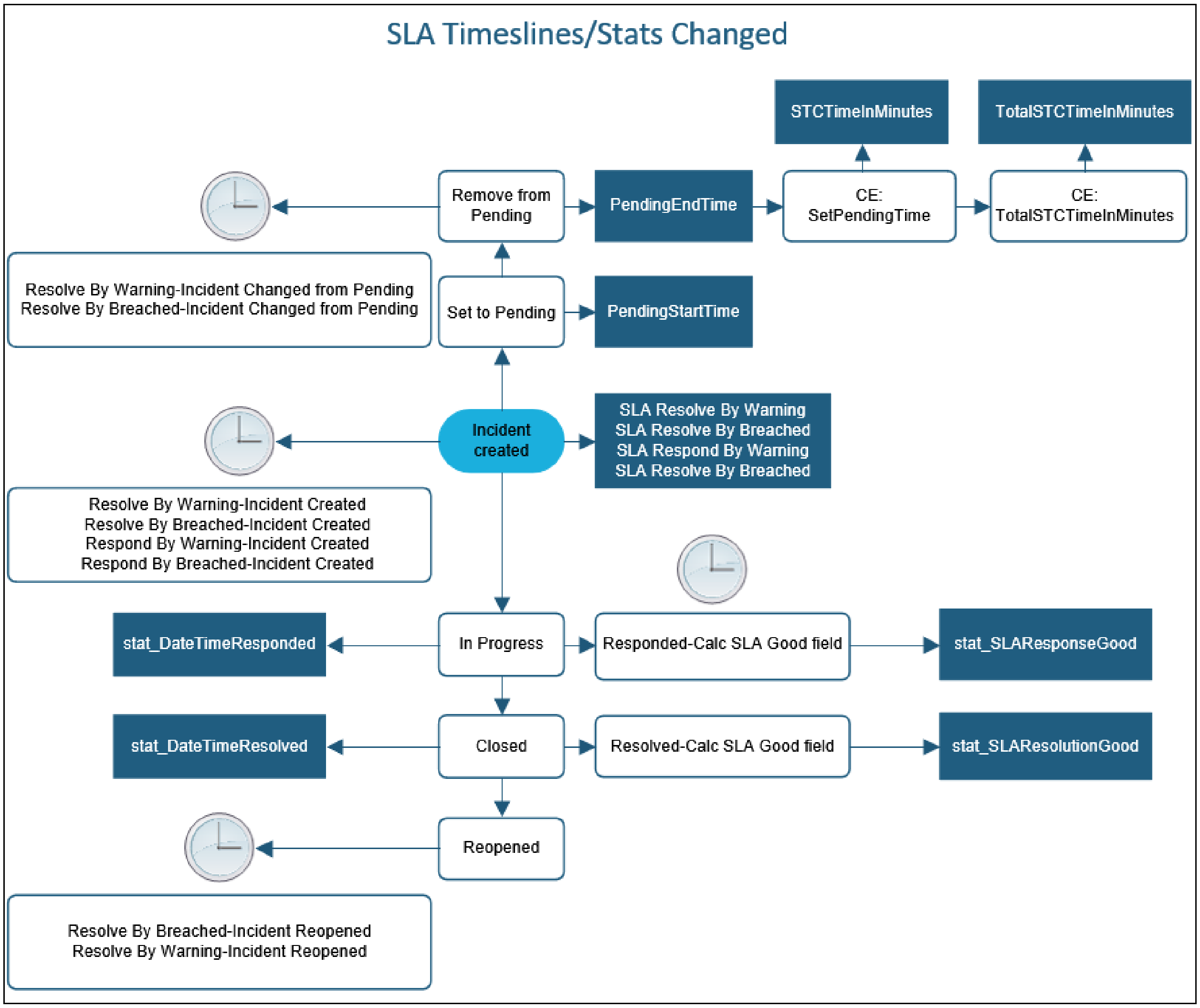
The SLA Timelines Created flowchart shows how timelines are initially set for SLA.



The SLA Selection flowchart shows how CSM determines the Incident SLA after the Incident has been created as more information is added to the ticket (example: when a customer is added).



The SLA Timelines/Stats Changed flowchart shows how SLA timelines are changed during the lifecycle of the ticket, and the associated APs that are triggered.



SLA is affected if a ticket goes to any of these statuses:

- **In Progress**: Marks the response-by date and time.
- **Pending**: Calculates total amount of time (in minutes) in this status. If Stop The Clock (STC) is allowed, this time will be added to extend the deadline to prevent the SLA from breaching.
- **Closed**: Marks the resolution date and time.
- **Reopened**: Begins monitoring for SLA breach again based on the ticket SLA deadline. Time spent in Closed status does not stop the clock.

SLA Breach

- A warning is initiated (if configured), the ticket is marked as *warned*, and emails are sent (if configured).

- One-Step™ Action runs (OOTB: marks the ticket as having breached, emails the technician/manager). Breached incidents display in applicable dashboards/metrics.

Priority

The priority is used to establish timescales and effort to respond to and resolve an issue (Incident or Request). Priority is derived from an impact and urgency Priority Matrix.

- Impact: Measures the effect of an Incident/Request (ex: Number of Customers affected/influenced by the Incident).
- Urgency: Measures how long it will be until the Incident has a significant impact on the business (ex: If the e-mail server goes down, all Customers are immediately affected).

CSM uses Priority Matrixes to automatically calculate priority and to provide a visual perspective of how priorities align. Because Incidents and Requests typically require different priorities, each uses its own Matrix. Priority Matrixes are organized by Priority Groups so that they can be applied to Services. Default Priority Groups include:

- Standard: Standard Priority Matrixes for Incident and Request.
- E-mail/Calendaring: Priority Matrixes dedicated to the E-mail/Calendaring Service. Priority Groups and Priority Matrixes are configurable, so any Service/entity can have its own Priority Group/Matrix.

A Priority Matrix Element Form defines each priority that populates your Priority Matrix. This form is a child form, and is linked to and available from its parent SLA Form (Priority Matrix Elements tab in the SLA Form Arrangement).

Note: For more information about the Priority Matrix Element Form, refer to the Priority Matrix Element Form documentation.

OOTB Priority Matrixes

OOTB Priority Groups include:

- Standard: Standard Priority Matrixes for Incident and Request.
- E-mail/Calendaring: Priority Matrixes dedicated to the E-mail/Calendaring Service. Priority Groups and Priority Matrixes are customizable, so any Service/entity can have its own Priority Group/Matrix.

Standard Incident Priority Matrix

Standard Incident Priority Matrix		**Impact**		
		Company	**Department**	**Individual**
Urgency	**High**	1	2	3
	Medium	2	3	4
	Low	3	4	5

Standard Request Priority Matrix

Standard Request Priority Matrix		**Impact**		
		Must Have	**Should Have**	**Whenever Possible**
Urgency	**Expedite**	1	2	3
	Standard	2	3	3

E-mail/Calendaring Incident Priority Matrix

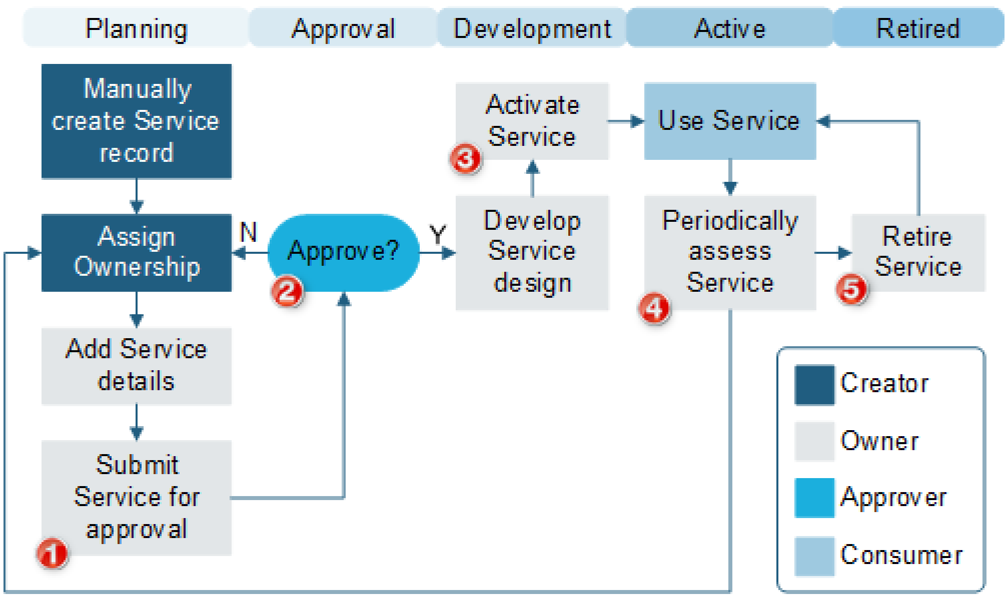
E-mail/Calendaring Incident Priority Matrix		**Impact**			
		Company	**Department**	**Team**	**Individual**
Urgency	**Critical**	1	1	2	2
	Normal	3	3	4	4

E-mail/Calendaring Request Priority Matrix

E-mail/Calendaring Request Priority Matrix		**Impact**	
		Critical	**Routine**
Urgency	**Expedite**	1	2
	Standard	2	3

Service Workflow

Diagram describes the high-level Service workflow in the OOTB system.



1	A One-Step™ Action changes the status to Approval.
2	The Approver can approve or reject a Service. • Approve: a One-Step Action changes the status to Development. • Reject: a One-Step Action changes the status back to Planning.
3	A One-Step Action changes the status to Active. The Service is now available to users and customers.
4	When periodically assessing, the Owner can revise or retire a Service. • Revise: a One-Step Action changes the status back to Planning. • Retire: a One-Step Action changes the status to Retired.
5	When retired, the Owner can reactive a Service. A One-Step Action changes the status back to Active.

Note:

- CSM uses several features to enhance the Service workflow (example: The Service Form helps create and manage Services, One-Step Actions help move a Service through its workflow, etc.).

- Service phases align with Service statuses, but this is not the case in every process (example: Incident phases are different than Incident statuses).

Contributors

A Service typically involves the following contributors. Depending on your workflow and the size of your company, many of these contributors might be combined into one person (example: Creator and Owner might be the same person).

- **Creator:** User who creates the Service. This is typically a member of the Services Team.
- **Owner:** User who manages the Service. This is typically a member of the Services Team.
- **Approver:** User who ensures that the Service is ready to be released and made operational in a live environment. This is typically the Service/IT Manager.
- **Consumer:** Person who uses the Service. This is typically a customer or user logging a record.

Phases

The Service workflow is broken down into the following phases:

1. **Planning:** Creator creates a new Service. Ownership is assigned. Then, the owner designs the Service and submits it to an Approver for approval to develop.
2. **Approval:** Approver approves the Service for development. The Approver can also reject the Service and send it back for rework.
3. **Development:** Owner defines categories and subcategories for the Service. When ready, the Owner releases/activates the Service.
4. **Active:** Service is operational in a live environment. The Service is periodically assessed by the Owner. The Service can be sent back for review/rework or be retired if necessary.
5. **Retired:** Expired/out-of-date Service is retired. The Service can be reactivated, if necessary.

Create a Service/SLA/Priority Structure

To create a Service, SLA, Priority structure:

1. Design a three-tier Categorization for each Service.
2. See SLA and Priority.
3. Create one or more SLAs:

   Tip: CSM provides a default SLA, named Corporate. Consider using this SLA for all Incidents/ Requests. If needed, change the Target Times to meet your needs.

   a. Create a new SLA by clicking **File>New>New SLA** from the CSM Desktop Client menu bar or by clicking **New>New SLA** on the CSM Desktop Client toolbar.

      A new SLA Record is created with a Status of New.

   b. Complete the SLA fields. The Title and SLA Type are required to save the record.

   c. Plan your SLA:

      i. In the Status alert bar, click **Set to Planning**.

         The SLA status changes to Planning.

   d. Define your SLA Target Times:

      i. Click the **SLA Target Times** tab (Form Arrangement area).

      ii. Click **New SLA Target Time**.

         The New SLA Target Times form opens.

         Note: For detailed field information, refer to the Target Times Form documentation.

         Notes: By default, the Target Times form uses a wizard interface that provides helpful information for creating Target Times. To bypass the Target Times wizard and complete the information using one form, select the **Disable Target Time Wizard** radio button under Advanced Options in the Main Pane.

      iii. Select/define your Priority and parent type.

      iv. Click the **Next** button 

 and define your Work Hours.

      v. Click the **Next** button 

 and define your Response Time.

      vi. Click the **Next** button 

 and define your Resolution Time.

   e. Add values to your Priority Matrix:

      i. Click the **Priority Matrix Element tab** (Form Arrangement area).

      ii. Click **New Priority Matrix Element**.

         The Priority Matrix Element form opens.

iii. Define the priorities.

Note: For detailed field information, refer to Priority Matrix Element form.

4. Activate your SLA:
   a. In the Status alert bar, click **Active**.
5. Create one or more Services:
   a. Create a new Service by clicking **File>New>New Service** from the CSM Desktop Client menu bar or by clicking **New>New Service** on the CSM Desktop Client toolbar.

   A new Service Record is created with a Status of Planning.

   b. Define the Service fields.

   Note: For detailed field information, refer to the Service Form documentation.

   c. Define the Service Categories:
      i. Click the **Categories** tab (Service Form Arrangements area).
      ii. Click **New Category**.

      The Category form opens.

      iii. Complete the fields.

      Note: For detailed information, refer to the Service Form documentation.

   d. Define the Service Subcategories:
      i. Click the **Subcategories** tab (Arrangements area).
      ii. Click **New Subcategory**.

      The Subcategory form opens.

      iii. Define the fields.

      Note: For more information, refer to the Service Form documentation.

6. Activate your Service:
   a. In the Status alert bar, click **Set as Active**.
7. After the SLA is activated, you have the following options:
   a. If you discover that work needs to be done on the SLA, click the **Deactivate this SLA** link to temporarily disable it (Status changes to Inactive). The SLA can be reactivated by clicking the Set to Planning link in the Status alert bar.
   b. If the SLA is no longer applicable, click **Retire this SLA** (Status changes to Retired). The SLA can be reactivated by clicking the Set to Planning link in the Status alert bar.

Service Design Ideas

CSM provides an OOTB Service workflow with all the items you need to successfully manage Services. You can use this workflow, or tailor it to meet the needs of your organization.

Design ideas include:

- **Fields:** Change which fields are required and when, which fields support Rich Text, etc.
- **View Counter:** Incrementally track the number of times a record is viewed by a customer or user in the Desktop Client, Browser Client, and CSM Portal. View Counter functionality is configured in CSM Administrator.
- **Statuses:** Change Service statuses and/or the One-Step Actions that are initiated when a Service enters each status.
- **Form:** Change the form theme (background and text color), tab order, and size. Change the threshold and/or colors for priority.
- **Actions and One-Step Actions:** Create Actions/One-Step Actions to automate your workflow.
- **Email:** Change the templates that are used to create the emails sent by One-Step Actions or Automation Processes (example: "Notify Owned By via Email" One-Step Action). The email templates are defined as part of the One-Step Action. Or, disable/change when and to whom notifications are sent.
- **Automation Processes:** Enable/disable the Automation Processes that monitor Incidents (example: Monitors for record inactivity, sends automatic notification emails, etc.).
- **Field Value Options:** Use Table Management to add/edit Lookup Object values for use in drop-down fields.
- **Relationships:** Consider creating a relationship to show an association between Service and Customer - Internal so you can view all Services used by a particular customer and all customers associated with a particular Service.

Note: Detailed step-by-step instructions for the above is beyond the scope of this content.

Service/Service Catalog Features

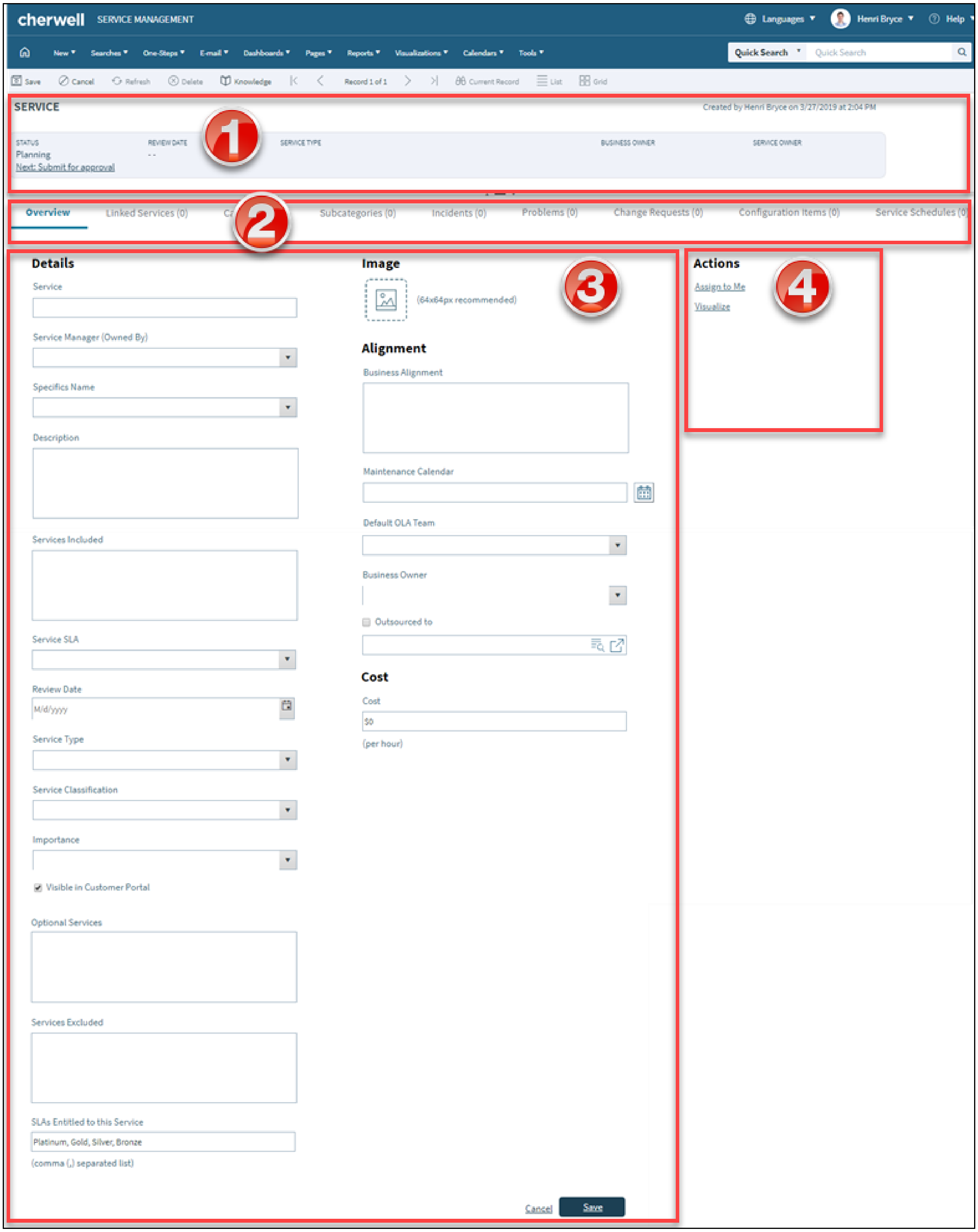
CSM provides the following tools to help manage Services.

Service Form

Use the Service Form to define and manage your Services.

The Service Form is made up of four main areas:

1. Default Form: Displays Service name, status, and Created By information.
2. Form Arrangement: Dynamically displays linked records (Child Records) that are in a relationship with the parent Service record.
3. Form Area: Displays the form fields for the tab selected in the Form Arrangement. The Overview form contains the most important information related to the Service.
4. Actions List: Dynamically displays a list of actions that are available for the current Service.


cherwell SERVICE MANAGEMENT
Languages
Henri Bryce
Help
New
Searches
One-Steps
E-mail
Dashboards
Pages
Reports
Visualizations
Calendars
Tools
Quick Search
Save
Cancel
Refresh
Delete
Knowledge
Record 1 of 1
Current Record
List
Grid
SERVICE
Created by Henri Bryce on 3/27/2019 at 2:04 PM
STATUS
Planning
Next: Submit for approval
REVIEW DATE
SERVICE TYPE
BUSINESS OWNER
SERVICE OWNER
1
Overview
Linked Services (0)
Subcategories (0)
Incidents (0)
Problems (0)
Change Requests (0)
Configuration Items (0)
2
Details
Service
Service Manager (Owned By)
Specifics Name
Description
Services Included
Service SLA
Review Date
M/d/yyyy
Service Type
Service Classification
Importance
Visible in Customer Portal
Optional Services
Services Excluded
SLAs Entitled to this Service
Platinum, Gold, Silver, Bronze
(comma (,) separated list)
Image
(64x64px recommended)
3
Alignment
Business Alignment
Maintenance Calendar
Default OLA Team
Business Owner
Outsourced to
Cost
Cost
$0
(per hour)
Cancel
Save
Actions
Assign to Me
Visualize
4

Good to know:

- Search for one or more Services that meet a specific criteria by running a Quick Search or Saved Search.
- Create a new Service by selecting **New > New Service** on the CSM Desktop Client toolbar or **File > New > New Service** from the CSM Desktop Client menu bar.
- The Service categorization has a three-tiered organization (Service, category, and subcategory) that determines the type of support required (Incident or Request), which Specifics Form to display to capture the appropriate details, and which Priority Matrix to use.
- CSM provides multiple OOTB Services for use throughout CSM. Use these Services as-is or create your own using the Service Form.
- CSM provides several OOTB categories and subcategories to use as part of the Service categorization. Use these categories and subcategories as-is, edit them, or create your own using their respective forms in the Arrangement area of the Service Form.
- CSM implements several OOTB Actions/One-Step™ Action to make Service management more efficient. For more information about Actions and One-Step Actions, refer to the Actions/One-Step Actions documentation.

  Note: A full list of One-Step Actions is beyond the scope of this document. Export a schema document from CSM Administrator (Create a Blueprint>Tools>Export Schema) to view a full list of One-Step Actions associated with a particular type of Business Object (example: Major).

- The Status (in the Default Form) indicates the current phase of the Service as it moves through its workflow.
- The Form Area displays the main form fields.
- Fields:
  - Some validated fields can recognize what you are typing and will suggest a value for you (example: Type "P" into the field; CSM will suggest the first item it finds that starts with the letter P). Use the Down Arrow button to scroll through other possible values.
  - Press **F3** to open a Selector window, where you can select a legal value or create a new value.
  - Press **Tab** to move to the "next" field on the form.
- Saving:
  - Date, time, and user name information is recorded the first time the form is saved, and each time the form is modified.

The following table describes the fields on the form.

Field	Description	Comments
Default Form	Important at-a-glance information, such as record type, Status bar (current and next Status), Review Date, Service Type, and record ownership.	
Status	Current Status of the Service as it moves through the Service workflow. Statuses include: • **Planning:** Service is being created and designed. • **Approval:** Requirements are being finalized and authorized. Requirements are communicated, budgets and resources are allocated. • **Development:** Service is being developed (refined and tested). • **Active:** Service is operational in a live environment. • **Retired:** Service is retired from use.	
Next: Status	Select the **links** to move the Service through the Service workflow. Actions include: • **Submit for Approval:** Changes the Service Status to Approval. • **Begin Development:** Changes the Service Status to Development. • **Reject:** Changes the Service Status back to Approval. • **Set as Active:** Changes the Service Status to Active. • **Retire:** Changes the Service Status to Retired. • **Submit for Review:** Changes the Service Status back to Approval.	One-Step Actions (Alt 1 Step from Relationship, Alt 2 Step from Relationship, or Next Step from Relationship): Conditionally changes the record Status to next logical Status (defined by the Status values in Table Management).
Form Area		
<Service Name>	Name that uniquely identifies the Service. Be succinct because the Service Catalog displays this name.	
Service Manager	Service/Record owner. Person responsible for owning the Service.	

Field	Description	Comments
Specifics Name	Specifics Form is associated with the Service.	
Description	Description of the Service.	
Services Included	List of mini services included in the Service.	
Service SLA	Service SLA bound to this Service, if applicable. **Note:** Not many Services require a special SLA. In the OOTB system, only Desktop Management and E-mail Calendaring have their own SLAs.	
Review Date	Scheduled review MM/DD/YYYY for the selected Service. Select the **Calendar button** to launch a Calendar where you can schedule a date.	Used to allow the Service to be periodically reviewed to ensure that it is correct/updated.
Service Type	Type of Service: • Technical • Business	
Service Classification	Service Classification: • Core IT • On Demand • Subscription	
Importance	Service Importance: • Mission-Critical • Support • Optional	
Visible in Customer Portal	If selected, this Service is part of Service Catalog available in the Customer Portal.	
Optional Services	List of optional mini services included in the Service.	

Field	Description	Comments
Services Excluded	List of mini services not included in the Service.	
SLAs Entitled to this Service	Lists the SLAs that can access the Service in the Portal (Corporate means every Customer can access the Service in the Service Catalog; Platinum, Gold, Silver, and Bronze limit the Service by Customer status/level). SLAs must be separated by a comma.	
Image	Image that represent the Service in the UI. Select the **Set Image** button to open the Image Manager, where you can select or import an image.	
Business Alignment	Business reasoning/alignment supporting this Service.	
Maintenance Calendar	Defined Business Hours for the Service, as defined in the Business Hours Manager.	
Default OLA Team	Default OLA team responsible for the operational components of the Service.	
Business Owner	CSM User who is responsible for being the business stakeholder.	
Outsourced To	Vendor to whom the Service is outsourced, if any.	
Cost	Cost per hour associated with the Service.	
Form Arrangement	Dynamically displays child records that are in a relationship with the Service.	
Linked Services	Displays related Services that have a dependency on this Service.	
Categories	Displays the defined Service Categories that categorize your Service.	For more information, see Service Categorization.
Subcategories	Displays the defined Service Categories that categorize your Service.	
Incidents	Displays Incidents that are logged to report a disruption in this Service.	For more information, see About Incidents and Requests.
Problems	Displays Problems that involve this Service.	
Change Requests	Displays Change Requests that involve this Service.	
Configuration items	Displays CIs that are related to/support this Service.	
Service Schedules	Displays Service Schedules that affect this Service (example: Down for maintenance).	

Field	Description	Comments
SLAs	Displays SLAs that are bound to this Service.	For more information, see Service Level Agreements (SLAs).

Note: For more information about the Service One-Step Actions, see Service One-Step Actions.

Related concepts

About Quick Search

About Saved Searches

Specifics Forms

OOTB Service Categories and Subcategories

Service Categorization

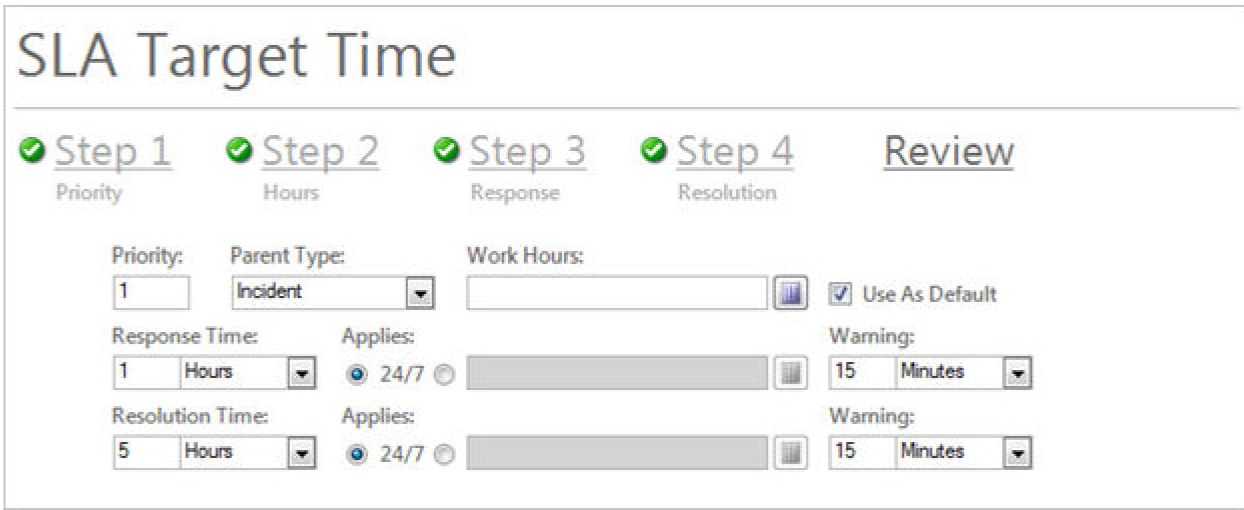
Service Workflow

Target Times Form

Use the Target Times form to define and manage your SLA Target Times. The Target Time form is a child form, and is linked to and available from its parent SLA form (**SLA Target Times** tab in the SLA form arrangement).

The Target Times form has a wizard interface, which allows you to easily move through the process of creating Target Times. However, you also have the option to disable the wizard and simply use the **Review** page (which includes identical information) to create the Target Times.

The following image shows the Review page:



The following table describes the fields on the form.

Field	Description	Comments
Priority	Priority name/value.	
Parent Type	Record type, either Incident or Request.	Determined by your toggle choice (SLA form).
Work Hours	Business Hours when the SLA should be used.	
Use as Default	The SLA is used as the default if the working hours cannot be determined or there is not a defined Target Time for the time period that an Incident or Service Request is created.	
Response Time	Target number of days, hours, or minutes to respond to the Incident (example: 1 hour).	
Resolution Time	Target number of days, hours, or minutes to resolve the Incident (example: 4 hours).	

Field	Description	Comments
Work Hours (Response Time)	Specifies the defined Business Hours that constrain the Target Time. If blank, it is assumed that it is a 24 hour clock. Select the **Business Hours Manager button** to launch the Business Hours Manager to select existing Business Hours or create new ones. Also select the time zone for the Business Hours based on time zones or the time zone of the Cherwell Application Server.	When you create new Business Hours, you must update the Created During What Business Hours expression to reflect the new hours. CSM uses this expression to set the Created During field on the Incident Business Object, and then uses the Created During field in the following relationships: • Incident Links CI Target Time • Incident Links Customer Target Time • Incident Links Service Target Time The field determines whether or not to use the Work Hours calendar in the SLA Target Time or to use the configured Response and Resolution calendars. If Business Hours overlap, move the preferred hours above the other hours in the list.
Work Hours (Resolution Time)		
Response Warning Time	Number of days, hours, or minutes before a response breach to initiate a warning. Used to alert you to an impending breach.	
Resolution Warning Time	Number of days, hours, or minutes before a resolution breach to initiate a warning. Used to alert you to an impending breach.	

Related concepts

Create a Service/SLA/Priority Structure

Define General Behaviors for Fields

Define Link Properties for a Relationship

Create Business Hours

Related tasks

Define a Case Expression

Priority Matrix Element Form

Use the Priority Matrix Element form to define and manage the values that go in your Priority Matrix. The Priority Matrix Element form is a Child form, and is linked to and available from its Parent SLA form (Priority Matrix Elements tab in the SLA form's Arrangement area). See OOTB Priority Matrixes for additional information.

The following table describes the fields on the form.

<table>
<tr><th>Field</th><th>Description</th><th>Comments</th></tr>
<tr><td>Priority Group</td><td>Specifies which Priority Group (Priority Matrix) the value is in:
• Standard: Standard Priority Matrixes for Incident and Request.
• E-mail/Calendaring: Priority Matrixes dedicated to the E-mail/Calendaring Service.
• Custom.</td><td></td></tr>
<tr><td>Incident/Service Request</td><td>Specifies whether the value is in the Incident or Request Priority Matrix.</td><td></td></tr>
<tr><td>Urgency</td><td>Specifies which Priority Matrix row the Priority is in.</td><td rowspan="2">The value is put into the row and column that intersect.</td></tr>
<tr><td>Impact</td><td>Specifies in which Priority Matrix column the Priority is in.</td></tr>
<tr><td>Priority</td><td>Specifies the value of the priority.</td><td></td></tr>
<tr><td>Matrix Order</td><td>Specifies the vertical and horizontal sort order for the grid (low to high). We recommend that you build left to right, then down.</td><td></td></tr>
<tr><td>Description</td><td>Description of the priority.</td><td></td></tr>
</table>

Service One-Step Actions

CSM provides the following OOTB Service One-Step Actions.

One-Step Action	Description/Actions	Association	Executed From
Next Step from Relationship	Conditionally changes the record status to next logical status (defined by the status values in Table Management).	Service	Service Form: Status: <Next Status>
Status Info	Displays a description of the Service.	Service	
Update Service Status	Prompts you to manually select any status.	Service	Service Form: Status: <Current Status>
Form Actions			
Ownership	Assign ownership.		
Assign to ANY Individual	Prompts the User to assign the record to any CSM User (not limited by Team). Uses Owned By ID and Owned By Team fields.	Service	
Assign to Individual	Launches the Choose Team window, where a user can choose an Owned By Team for the record; then, launches the Choose User window, where a user can choose a Primary User from the already-selected Team.	Service	
Assign to Team	Launches the Choose Team window, where a user can choose an Owned By Team for the record.	Service	
Take Ownership	Makes the Current User the Primary User of the record.	Service	Service Form: Assign to Me under Actions
Other			
Date/Time Information	Displays details for all the date/timestamps to give a historical view.	Service	

A full list of One-Step™ Actions is beyond the scope of this document. Export a schema document from CSM Administrator (**Create a Blueprint > Tools > Export Schema**) to view a full list of One-Step Actions associated with a particular type of Business Object.

Service Saved Searches

CSM provides the following OOTB Service Saved Searches.

Saved Search	Returns	Association	Executed From
Active Services	Services in the Active Phase.	Service	Search Manager, Reports
All Services	All Services, regardless of status.	Service	Search Manager

Problem Management

Problem management is the process that ensures that the root cause of multiple Incidents is resolved as quickly as possible.

About Problems

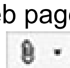
A Problem is the cause of one or more related Incidents. Problems involve a more complicated issue than Incidents, and require a deeper investigative process so that the Incidents do not reoccur. A Known Error is the root cause of a Problem and has a workaround to keep employees operating while the Problem is being resolved.

For example, technicians at a company log five separate Incidents related to e-mail issues. A technician notices this trend and logs a Problem that links all of the Incidents together as one record. The Problem is investigated and the Known Error (the root cause of a Problem) is determined to be a failed e-mail server connection.

Problem Good to Know

- Search for one or more Problems that meet a specific criteria by running a Quick Search or Saved Search.
- Create a new Problem by clicking **New > New Problem** on the CSM Desktop Client toolbar, by clicking **File > New > New Problem** from the CSM Desktop Client menu bar, or by pressing CTRL+SHIFT+P.
- You can create a Problem from multiple Incidents, then attach additional Incidents when appropriate.
- By default, Problem uses the Corporate Priority Matrix.
- The OOTB system implements several Actions/One-Step Actions to make logging Problems more efficient. For more information about Actions and One-Step Actions, refer to the Actions/One-Step Actions documentation.

  Note: A full list of One-Step Actions is beyond the scope of this document. Export a schema document from CSM Administrator (Create a Blueprint>Tools>Export Schema) to view a full list of One-Step Actions associated with a particular type of Business Object (example: Major).

- CSM provides several OOTB Automation Processes to automate Problem Management. For more information, refer to the Automation Process documentation.
- If enabled (via Automation Process), e-mail notifications are:
  - Automatically created and sent to User owners to notify them of ownership.
  - Automatically created and sent to Team owners to notify them of ownership.
- When on a record, you can send an e-mail directly to the current Customer (Requestor) by clicking **FIle > E-mail Current Customer**, or by clicking the **Notify Impacted Customers of Update** link in the Actions section. If sent using the File menu, the e-mail is blank. If sent using the Notify Impacted Customers of Update link, an e-mail template is used to auto-populate the e-mail with information from the current Incident (example: Change ID, Customer's name, logging date/time details, etc.).
- Journals track what occurs during the record's lifecycle (example: Notes to track progress or comments, and History to track important field changes, e-mail correspondence, etc.). View or add Journals by clicking the Journal tab in the record's Arrangement.
- Attachments supplement records by providing additional details in the form of linked/imported files (.pdf, .doc, etc.), images, web pages, and Document Repositories. View and manage Attachments using the Attachment button  and Attachments bar.
- The Default Form at the top of the Problem form shows important at-a-glance information:
  - Problem number and priority, along with the priority. Red indicates a priority 1, orange indicates a priority 2, and green indicates a priority 3-5.
  - The current status of the Problem as it moves through its workflow. The next status is displayed as a link directly beneath the current status. Click the status link to move the Problem to the next status.

Note: Typically, workflow statuses should be enforced; however, some records do allow Users (with security rights) to bypass statuses (example: Problems can be manually closed without being formally resolved, if needed). To bypass a status, click **Select Other Status** in the Actions section.

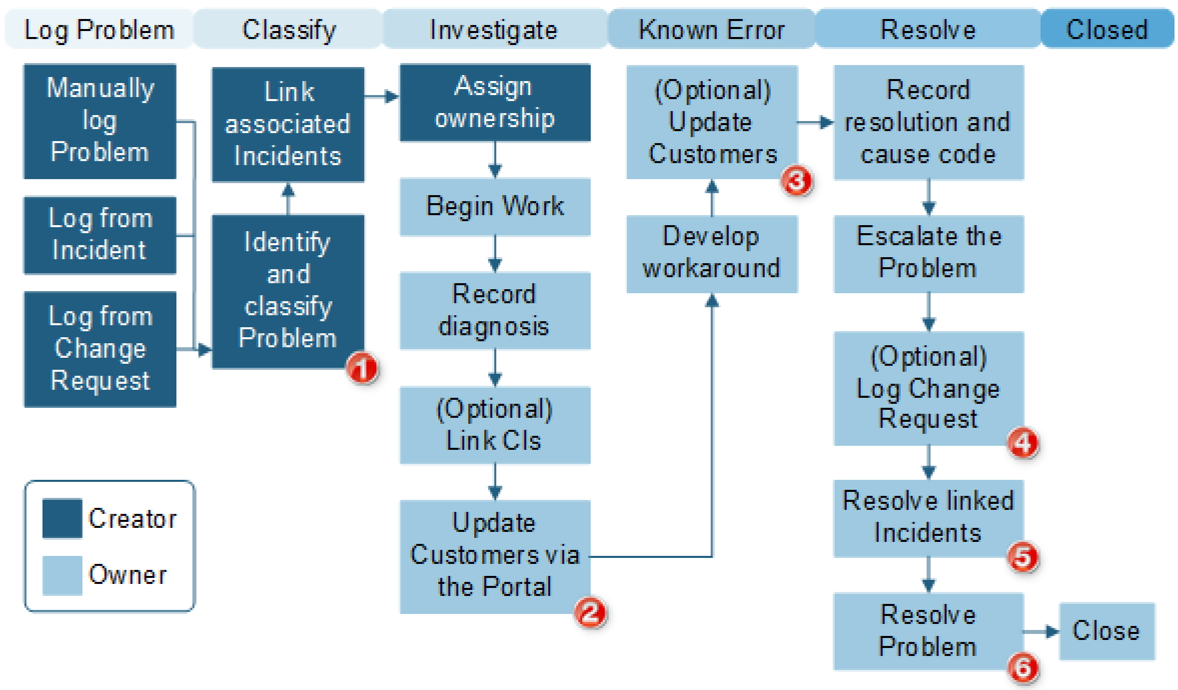
  - Resolve Within
  - Solution Type
  - Assigned To
- Press **TAB** to move to the next field on the form.
- Fields:
  - The Description field is a Rich Text field. To format the text or embed an image, click the **Zoom** button .
  - Submit a Workaround to your Knowledge Base or submit a Known Error to the Portal using their respective buttons in the Workaround and Known Error phase.

Note: A full list of Fields is beyond the scope of this document. Export a schema document from CSM Administrator (Create a Blueprint>Tools>Export Schema) to view a full list of fields associated with a particular type of Business Object (example: Major).

- Saving:
  - Date, time, and user name information is recorded the first time the form is saved, and each time the form is modified.
  - Clicking Save triggers an audit of certain Problem information, such as Status, Priority, Owned By, Diagnosis, and Workaround. If a change is detected in one of those Fields, a Journal-History record is created to track the change. View the changes in the Problem Journals tab (Arrangement section).

Problem Workflow

The following figure shows the high-level Problem process workflow in the OOTB system.



1	Creator enters a Title, Detailed Description, Categorization, and Priority. When saved, the Problem is displayed on the Problem Management Dashboard to notify the Problem Management team of its existence.
2	Owner uses the Publish Known Error to Customer Portal Action. A One-Step Action posts the Diagnosis Field contents in the Known Errors section of the Portal.
3	Owner provides details of the Diagnosis and Workaround by submitting a Knowledge Article (KA), publishing in Portal, and/or emailing Customers. A One-Step Action creates a new KA using text from multiple Problem Fields. Text from the Workaround field is posted in the Top Issues section of the Portal. A One-Step Action sends a notification email to the Customers of linked Incidents.
4	A One-Step Action changes the status to Pending Change and creates a new Change Request record.

5	A One-Step Action makes the current User the owner, changes the Problem status to Resolved, and notifies Customers of linked Incidents.
6	A One-Step Action changes the Problem status to Resolved and sends an email to Incident owners (linked to the Problem) to notify them of the solution.

Note: CSM uses several features to manage the Problem workflow (example: the Problem Form helps create and manage Problems, One-Step Actions help move the Problem through its workflow, Automation Processes notify stakeholders via emails, a Problem Dashboard notifies stakeholders and tracks metrics, etc.).

Contributors

A Problem typically involves the following contributors:

- **Creator:** User who first logs the Problem. This is typically a member of the Problem Management Team.
- **Owner:** User who manages the Problem. This is typically an IT manager who is a member of the Problem Management Team.

Phases:

The Problem workflow is divided into the following phases:

1. **Classify:** Creator logs a new Problem. Then, the creator identifies and classifies the Problem (Description, Service, Category, and Priority). The creator updates Customers via Twitter and links related Incidents to the record.
2. **Investigate:** Ownership is assigned. The owner begins work, investigates and analyzes the Problem, and then records a diagnosis. The owner updates Customers by publishing the Problem to the Portal, and then links Configuration Items (CIs).
3. **Known Error:** Owner develops and records the workaround. Then, the owner can update Users (by submitting a Knowledge Article to Knowledge Base) and Customers (by publishing a known error to Customer Portal, post to Twitter, or send email).
4. **Resolve:** Owner records resolution details and cause code. Then, the owner can escalate the Problem and/or log a Change Request required to solve the Problem (if necessary). The owner then resolves attached Incidents before resolving the Problem.
5. **Closed:** Owner closes the Problem.

Statuses

A Problem progressing through the workflow encounters the following statuses:

1. **New:** Problem is being logged, identified, and classified.
2. **Assigned:** Problem has been assigned to an owner.
3. **Work in Progress:** Problem is being diagnosed, investigated, and analyzed.

4. **Pending Change:** Problem process is on hold until a Change Request is implemented.
5. **Resolved:** Problem is resolved.
6. **Closed:** Problem is closed.

Note: Problem statuses do not align with Problem phases.

Related concepts

Problem Form

Log a Problem - Detailed

Problem One-Step Actions

Logging Problems

The following instructions are available to walk you through the steps to log a new Problem using our OOTB workflow:

- Log a Problem: Typical step-by-step instructions for logging a Problem.
- Log a Problem - Detailed: Detailed step-by-step instructions for logging a Problem, including tips, optional steps, and behind-the-scenes information.

Note: CSM provides an OOTB Problem workflow with all the features you need to successfully manage Problems. You can use this workflow as-is, or tailor it to meet the needs of your organization.

Log a Problem

The following procedure walks you through the typical steps to log a Problem.

To log a Problem:

1. On the CSM Desktop Client toolbar, click **New>New Problem**.

   A new Problem Record is created with a unique Problem ID (example: 10230) and a status of New.

2. Identify and classify the Problem:
   a. Provide a **Title** for the Problem (example: Email is not sending).
   b. Enter a **Description** (example: Email in the Marketing department is not sending).
   c. Enter a **Service Classification**. Use the Selector button to find a Service Classification.

      The Service and Category appear below the Service Classification field.

   d. Select an affected CI, if any. Click the **CI Selector** button to launch the CMDB window, where you can select a CI. You can locate CIs by filtering (by Config Type, All Customers, a specific Customer) or by searching. You can also create a new CI on the fly.
   e. Select an **Assigned Team**, an **Assigned To** team member, or both.
   f. Click the **Priority** selector button to reveal the Priority Matrix and then select an impact and urgency to generate a priority number.
   g. (Optional) Set a **Resolve By** date.
   h. Select the Incidents tab to link Incidents to the Problem.
   i. Click **Begin Work** in the header. The Problem now has a status of **In Progress**.
3. Analyze the Problem:
   a. Enter **Symptoms** and **Probable Causes**.
   b. Enter a **Root Cause**.
   c. Select a **Cause Category** from the drop-down.
4. Resolve the Problem:

   Determine if the resolution is a Workaround, Permanent Fix, or Known Error.

   a. If it is a Workaround, write a detailed procedure so that Users and Customers understand exactly what they are supposed to do.

      Notes: The Workaround field is required to create a Knowledge Article. The new Knowledge Article pulls information from the following fields: Short Description, Detailed Description, Service Classification, Workaround, Diagnosis, and resolution.

   b. If it is a Permanent Fix, enter details.
   c. If it is a Known Error, enter details.

d. Select Actions as applicable:
   - Notify Impacted Customers of Update: Send an email message to reporters of linked Incidents.
   - Resolve Linked Incidents: Mark linked Incidents as Resolved.
   - Publish Workaround to Customer Portal.
   - Create Knowledge Article.

e. If you find that the Problem was not resolved, you can reopen the record by clicking the **Select Other Status** link in the Actions section and selecting the status (example: Work in Progress) you want in the drop-down.

Related concepts

About Problems

Problem Workflow

Problem Features

Log a Problem - Detailed

The following procedure walks you through detailed step-by-step instructions for logging a Problem, including tips and behind-the-scenes information. The different contributors are noted in the procedure.

To log a Problem:

1. On the CSM Desktop Client toolbar, click **New>New Problem**.

   Tip: You can also click **File>New>New Problem** from the CSM Desktop Client menu bar, or press **CTRL+SHIFT+P**.

   Note: A Problem can be logged from an Incident (Task Pane>Incident Actions>Create Problem link). When submitted from an Incident, the Priority, Short Description, Detailed Description, and Service categorization are auto-populated and the Incident is linked to the Problem in the Arrangement area. A Problem can also be logged from anywhere in the system (Task Pane>Common Tasks>Create Problem), though fields do not auto-populate and a record is not automatically linked using this option.

   A new Problem Record is created with a unique Problem ID (example: 10230) and a status of New.

2. Identify and classify the Problem:
   a. Provide a **Title** for the Problem (example: E-mail is not sending).
   b. Enter a **Description** (example: E-mail in the Marketing department is not sending).
   c. Enter a **Service Classification**. Use the Selector button to find a Service Classification.

      The Service and Category appear below the Service Classification field.

   d. Select an affected CI, if any. Click the **CI Selector** button to launch the CMDB window, where you can select a CI. You can locate CIs by filtering (by Config Type, All Customers, a specific Customer) or by searching. You can also create a new CI on the fly.
   e. Select an **Assigned Team**, an **Assigned To** team member, or both.
   f. Click the **Priority** selector button to reveal the Priority Matrix and then select an impact and urgency to generate a priority number.
   g. (Optional) Set a **Resolve By** date.
   h. Select the Incidents tab to link Incidents to the Problem.
   i. Click **Begin Work** in the header. The Problem now has a status of **In Progress**.
3. Analyze the Problem:
   a. Enter **Symptoms** and **Probable Causes**.
   b. Enter a **Root Cause**.
   c. Select **Assigned Team to do a Root Cause Analysis** if applicable.
   d. Select a **Cause Category** from the drop-down. Options include:

    - Hardware Failure
    - Human Failure
    - Procedure Failure
    - Software Failure
    - Update Failure

4. Resolve the Problem:

   Determine if the resolution is a Workaround, Permanent Fix, or Known Error.

   a. If it is a Workaround:
      i. In the Workaround field, write a detailed procedure so that Users and Customers understand exactly what they are supposed to do.

         Note: The Workaround field is required to create a Knowledge Article. The new Knowledge Article pulls information from the following fields: Short Description, Detailed Description, Service Classification, Workaround, Diagnosis, and Resolution.

      ii. Select or add a Change Request.
      iii. Set a **Review by date**.
      iv. Select **Resolve and Close linked incidents**.
      v. Select **Notify Impacted Customers of Update**.
      vi. Select **Create Knowledge Article**.
      vii. Select **Publish Workaround to Customer Portal**.
      viii. Close the Problem.

   b. If it is a Permanent Fix:
      i. Select the **Permanent Fix** radio button.
      ii. Enter Permanent Fix details.
      iii. Select or add a Change Request.
      iv. Select **Resolve and Close linked Incidents.**
      v. Select **Notify Impacted Customers of Update**.
      vi. Select **Create Knowledge Article**.
      vii. Select **Publish Fix to Customer Portal**.
      viii. Close the Problem.

   c. If it is a Known Error:
      i. Select the **Known Error** radio button.
      ii. Enter Known Error details.
      iii. Set a Review by date.
      iv. Select **Notify Impacted Customers of Update**.
      v. Select **Create Knowledge Article**.

vi. Select **Publish to Known Errors on Customer Portal**.

vii. Close the Problem.

d. Select Actions as applicable:
   - Notify Impacted Customers of Update: Send an e-mail message to reporters of linked Incidents.
   - Resolve Linked Incidents: Mark linked Incidents as Resolved.
   - Publish Workaround to Customer Portal): Uses the Make Visible in Portal One-Step Action to display the workaround.
   - Create Knowledge Article: Creates a Knowledge Article in a new window, attaches the Problem, and autofills the Knowledge Article Title, Solution or Workaround, Service, Category, Article Type.

e. If you find that the Problem was not resolved, you can reopen the record by clicking the **Select Other Status** link in the Actions section and selecting the status (example: Work in Progress) you want in the drop-down.

Related concepts

Problem Workflow

Problem Form

Problem One-Step Actions

Problem Design Ideas

CSM provides an OOTB Problem workflow with all the items you need to successfully log and resolve Problems. You can use this workflow, or tailor it to meet the needs of your organization. Design ideas include:

- **Fields:** Change which Fields are required and when, which Fields support Rich Text, etc.
- **View Counter:** Incrementally track the number of times a record is viewed by a customer or user in the Desktop Client, Browser Client, and CSM Portal. View Counter functionality is configured in CSM Administrator.
- **Statuses:** Change Problem statuses and/or the One-Step Actions that are initiated when a Problem enters each status.
- **Form:** Change the Form theme (background and text color), tab order, and size. Change the threshold and/or colors for priority.
- **Actions and One-Step Actions:** Create Actions/One-Step Actions to automate your workflow (example: Tweet the Resolution description when a Problem is closed).
- **E-mail:** Change the templates that are used to create the e-mails sent by One-Step Actions or Automation Processes (example: "Notify Owned By via E-mail" One-Step Action). The e-mail templates are defined as part of the One-Step Action. Or, disable/change when and to whom notifications are sent.
- **Automation Processes:** Enable/disable the Automation Processes that monitor Incidents (example: Monitors for record inactivity, sends automatic notification e-mails, etc.).
- **Field Value Options:** Use Table Management to add/edit Lookup Object values for use in drop-down Fields (example: Cause Codes).
- **Additional Process Options:** Consider enhancing your process by creating a Major Problem workflow using new fields, One-Step Actions, and Automation Processes. The workflow might include a Major Problem Review where the Problem Reviewer provides information related to what went well, what did not go well, mitigation ideas, and lessons learned.

Note: Detailed step-by-step instructions for the above is beyond the scope of this content.

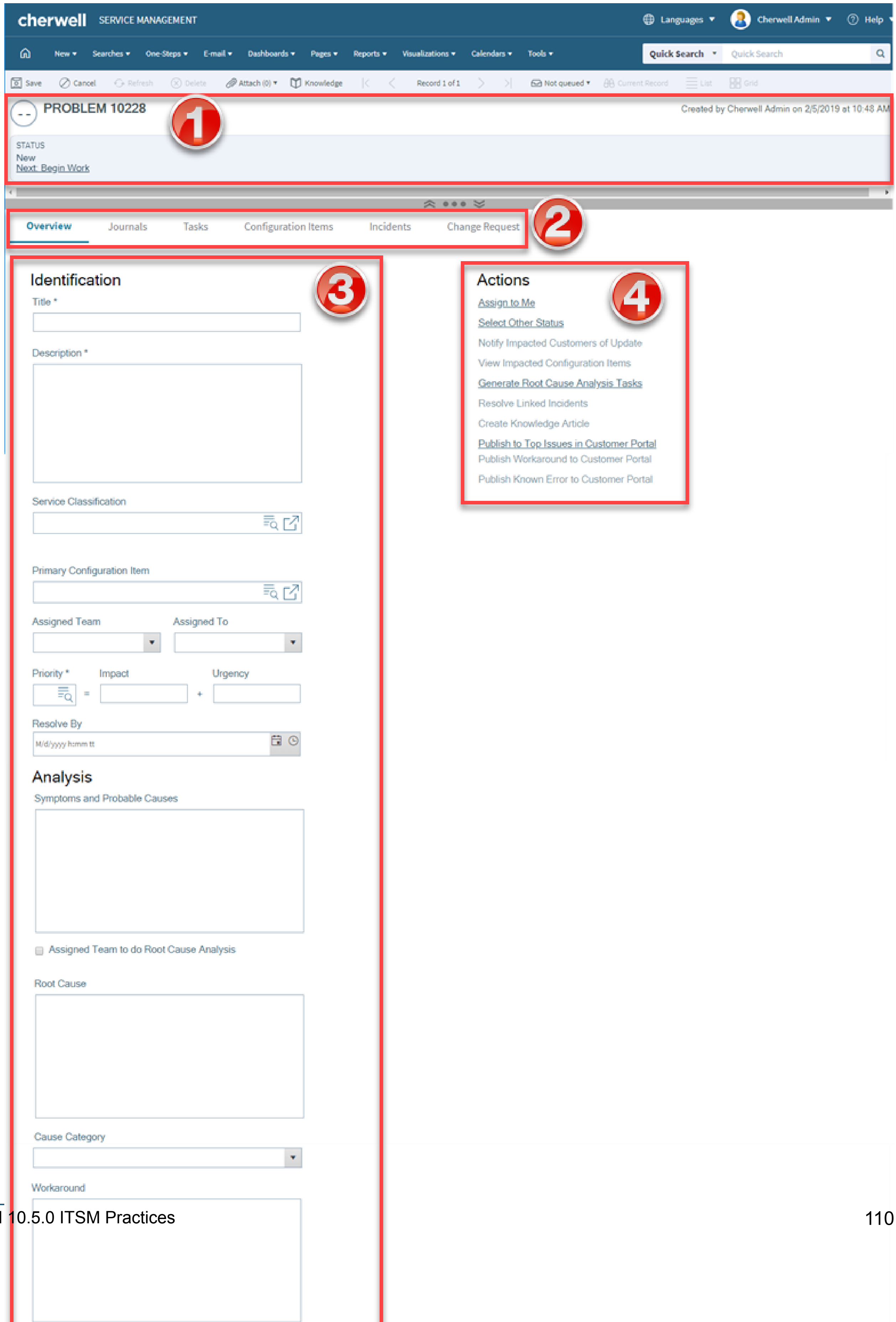
Problem Features

CSM provides the following tools to help manage Problems:

Problem Form

Use the Problem Form to log, edit, and track Problems. The form is made up of four main areas:

1. Default Form: Displays Problem number, status, and Created By information.
2. Form Arrangement: Dynamically displays linked records (Child Records) that are in a relationship with the parent Problem Record.
3. Form Area: Displays the form fields for the tab selected in the Form Arrangement. The Overview form contains the most of the information needed to perform the Problem workflow.
4. Actions List: Dynamically displays a list of actions that are available for the current Incident.
    - Assign to Me: Make yourself (Current User) the User owner for the Problem.
    - Select Other Status: Choose a different status from a dialog box.
    - Notify Impacted Customers of Update: Send an e-mail message to the Customers associated with Incidents linked to the Problem.
    - View Impacted Configuration Items: Opens a window with a visualization of the affected Configuration Item(s).
    - Generate Root Cause Analysis Tasks: Tasks associated with root cause analysis appear in the Tasks tab in the Form Arrangement.
    - Resolve Linked Incidents: Change the status of linked Incidents to Resolved.
    - Create Knowledge Article: Create a Knowledge Article using the text from the Workaround field.
    - Publish to Top Issues in Customer Portal: Publish the text from the Diagnosis and Workaround fields to the Portal. Customers can access the update by clicking the Top Issues link in the Portal.
    - Publish Workaround to Customer Portal: Adds the Problem and workaround to the Active Problems section in the Portal.
    - Publish Known Error to Customer Portal: Adds the Known Error to the Portal.


cherwell SERVICE MANAGEMENT
Languages
Cherwell Admin
Help
New
Searches
One-Steps
E-mail
Dashboards
Pages
Reports
Visualizations
Calendars
Tools
Quick Search
Save
Cancel
Refresh
Delete
Attach (0)
Knowledge
Record 1 of 1
Not queued
Current Record
List
Grid
PROBLEM 10228
Created by Cherwell Admin on 2/5/2019 at 10:48 AM
STATUS
New
Next: Begin Work
1
Overview
Journals
Tasks
Configuration Items
Incidents
Change Request
2
Identification
Title *
Description *
Service Classification
Primary Configuration Item
Assigned Team
Assigned To
Priority *
Impact
Urgency
Resolve By
M/d/yyyy h:mm tt
Analysis
Symptoms and Probable Causes
Assigned Team to do Root Cause Analysis
Root Cause
Cause Category
Workaround
3
Actions
Assign to Me
Select Other Status
Notify Impacted Customers of Update
View Impacted Configuration Items
Generate Root Cause Analysis Tasks
Resolve Linked Incidents
Create Knowledge Article
Publish to Top Issues in Customer Portal
Publish Workaround to Customer Portal
Publish Known Error to Customer Portal
4

The following table describes the fields on the form.

Field	Description	Comments
Form Area - Overview		
Step 1: Identify and Classify	Record the basic details.	
*Title	A concise description of the Problem.	*Required.
*Description	A detailed description of the Problem.	*Required. Full-Text field (searchable).
Service Classification	Service, category, and subcategory affected by the Problem.	For more information, see Service Categorization.
Primary Configuration Item	Main CI involved in the Problem.	
Assigned Team/ Assigned To	Select a User owner for the Problem. The Team owner is populated by the selected User owner's default Team.	
*Priority	Indicates the established timescales and effort to resolve a Problem. Priority is derived from an impact and urgency Priority Matrix.	*Required. For more information, see Priority.
Resolve By	Assign a required resolution date.	
Step 2: Analyze the Problem		
Symptoms	Problem symptoms.	
Probable Causes	Possible causes for the Problem.	
Root Cause	Enter a Root Cause, if known.	
Cause Category	• Hardware Failure • Human Failure • Procedure Failure • Software Failure • Update Failure	
Step 3: Resolve the Problem	Record the workaround and update Customers.	

Field	Description	Comments
Workaround	Provide an explanation of a workaround for the Problem.	The Workaround field is required to create a Knowledge Article. The new Knowledge Article pulls information from the following fields: Short Description, Detailed Description, Service Classification, Workaround, Diagnosis, and Resolution.
Solution	Determine if the solution is No Solution, Known Error, or Permanent Fix.	
Form Arrangement		
Overview	Overview of the current problem.	
Journals	Displays related Journal records that are created to track User notes/comments, Customer requests/comments, field and status changes, Queue history, and e-mail correspondence.	
Tasks	Displays related Tasks.	
Configuration Items	Displays CIs that are related to/support this Problem (example: Primary CI).	For more information, refer to About CMDB.
Incidents	Displays related Incidents that linked to/affected by the Problem.	
Change Request	Displays Change Requests that involve this Problem.	For more information, refer to About Change Requests.

Related concepts

Problem Workflow

Log a Problem - Detailed

Problem One-Step Actions

Problem Journals

CSM provides the following OOTB Problem Journal types:

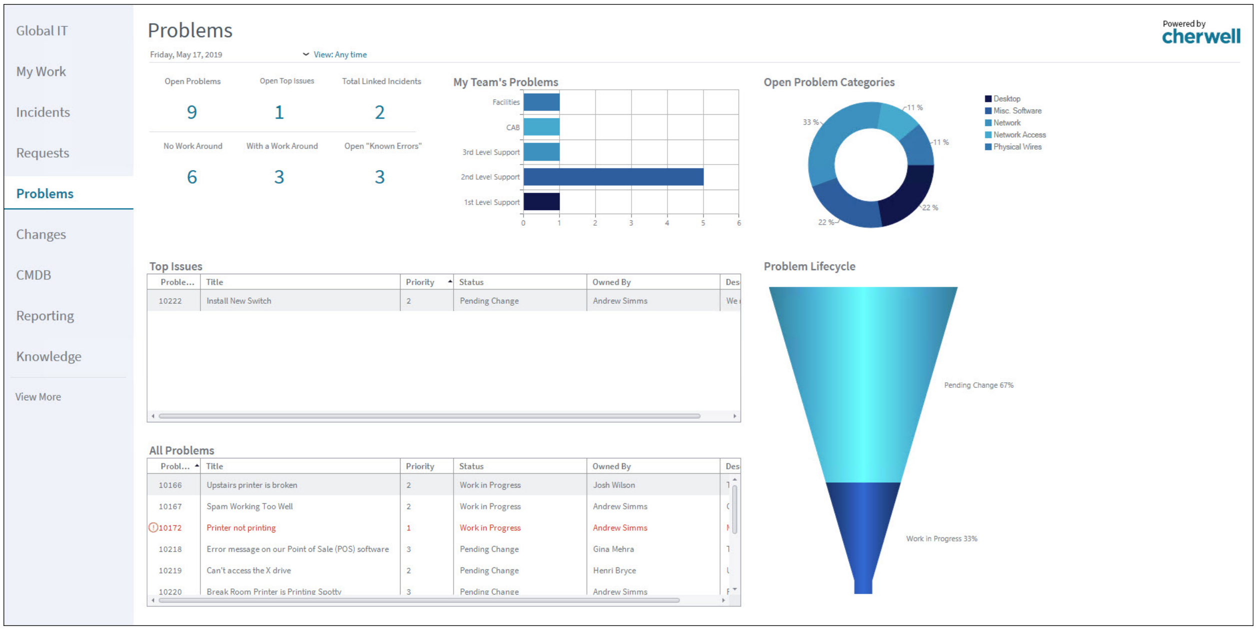
- **Journal - Note:** Tracks User notes/comments. For example, a User might chronicle troubleshooting progress.
- **Journal - Customer Request:** Tracks Customer requests/comments.
- **Journal - History:** Tracks important Field changes. Tracked Fields are configurable and are defined in the Business Object definition.
- **Journal - Mail History:** Tracks e-mail correspondence. For example, e-mails sent for receipt, follow-up, resolution, and questions.
- **Journal - Queue History:** Tracks when records are added to/removed from a Queue.

Note: History Journals are automatically created by CSM. Notes are manually created.

Each Journal Type has its own unique form. Journals are child records, so they are linked to and available from their parent records (access Journals by clicking the Journals tab in the parent record's Arrangement).

Problem Dashboard

CSM provides an OOTB Problem Dashboard that intuitively organizes your critical Problem metrics into a single control panel. The Dashboard displays the number of open Problems, number of open Top Issues (in the Portal), number of linked Incidents, number of Problems with and without workarounds, number of open known errors, number of Problems owned by Teams, percentage of Problems in each phase (New, Investigate, etc.), percentage of Problems in each category (based on Service), list of all Top Issues, and a list of all Problems.



Note: Problem metrics are also available on other Dashboards, including Executive, Global IT, and Change.

OOTB Problem Dashboard Widgets

Item	Description	Widget Type	Widget Name	Widget Uses:
Open Problems	Number of open Problems (Status does NOT = Resolved or Closed).	Text Gauge	Total Open Problems	Open Problems Saved Search
Open Top Issues	Number of open Problems (Status does NOT = Resolved or Closed) Top Issues in Portal = True.	Text Gauge	Top Issues Count	Problems Set as Top Issues Saved Search

Item	Description	Widget Type	Widget Name	Widget Uses:
Total Linked Incidents	Number of open Incidents (Status does NOT = Resolved or Closed) linked to the Problem.	Text Gauge	Incidents Affected Counter	Incidents Linked to Problem Saved Search
No Work Around	Number of open Problems (Status does NOT = Resolved or Closed) with a cleared Workaround Exists check box.	Text Gauge	Problems with No Work Around	No Workaround Saved Search
With a Work Around	Number of open Problems (Status does NOT = Resolved or Closed) with a marked Workaround Exists check box.	Text Gauge	Problems with a Workaround	Workaround Exists Saved Search
Known Errors	Number of open Problems (Status does NOT = Resolved or Closed) with completed Workaround and Resolution fields.	Text Gauge	Known Error	Open: Known Error Saved Search
My Team's Problems	Percentage of open Problems (Status does NOT = Resolved or Closed) based on Team ownership.	Bar Chart	Problems by Teams	Open Problems Saved Search with values based on Owned By Team field.
Problem Lifecycle	Percentage of open Problems (Status does NOT = Resolved or Closed) based on the Status field.	Pipeline Chart	Problem Lifecycle	Pipeline slices represent Problem statuses.
Open Problem Categories	Percentage of open Problems (Status does NOT = Resolved or Closed) based on the Category field.	Pie Chart	Open Problems	Chart slices represent Problem categories.
Top Issues	List of Problems that have been identified as "Top Issues in Portal".	Search Results List	Global Issues	All Top Issues Saved Search.
All Problems	List of all open Problems (Status does NOT = Resolved or Closed).	Search Results List	All Problems	Open Problems Saved Search.

Problem One-Step Actions

CSM provides numerous OOTB Problem One-Step Actions. Notable Problem One-Step Actions include:

One-Step Action	Description/Actions	Associations	Executed From
Status			
Next Step from Relationship	Conditionally change the Problem status to next logical status (defined by the Problem status values in Table Management) and/or initiate the next appropriate One-Step Action: • Begin Work: Start Work in Progress One-Step Action. • Set as Resolved: Set as Resolved One-Step Action. • Pending Change: Set to Pending Change One-Step Action. • Close: Set as Closed One-Step Action.	Problem	Problem Form, Next: <Status>
View More Status Options	Allows the User to set any status.	Problem	Problem Form, Next: <Status>
Conditional Status			
Start Work in Progress	Changes the Problem status to Work in Progress. If an owner is not assigned, assigns the Problem to the current User and the Team the User belongs to.	Problem	Problem Form, Status: **Begin Work** link
Set as Resolved	Changes the Problem status to Resolved.	Problem	Problem Form, Status: **Set as Resolved** link
Set to Pending Change	Changes the Problem status to Pending Change.	Problem	Problem Form, Actions: **Set as Pending Change** link
Set as Closed	Changes the Problem status to Closed.	Problem	Problem Form, Status: **Close** link
Assign to Team	Launches the Choose Team window, where a User can choose an Owned By Team for the record. Changes Problem status from New to Assigned.	Problem	Problem Form, Owned By: Select Team link

Assign to Individual	Launches the Choose Team window, where a User can choose an Owned By Team for the record; then, launches the Choose User window, where a User can choose a Primary User from the already-selected Team. Changes Problem status from New to Assigned.	Problem	Problem Form, Owned By: Select Owner link
Form			
Take Ownership	Makes the Current User the Primary User of the record. Changes status from New to Assigned.	Problem	Problem Form, Actions: **Assign to Me** link
Publish/Remove Known Error to/ from Portal	If the known error is not yet visible in the Top Issues section of the Portal, uses the Publish Known Error in Portal One-Step Action Action to display the known error. If the known error is visible in the Top Issues section of the Portal, uses the Remove Known Error from Portal One-Step Action Action to remove the known error.	Problem	Problem Form, Actions: **Publish Known Error to Customer Portal** link
Resolve Incidents	Makes the current User the owner, and then changes the Problem status to Resolved. When the status changes to Resolved, e-mails Customers of attached Incidents to notify them of the resolution.	Problem	Problem Form, Actions: **Resolve Linked Incidents** link

A full list of One-Step™ Actions is beyond the scope of this document. Export a schema document from CSM Administrator (**Create a Blueprint > Tools > Export Schema**) to view a full list of One-Step Actions associated with a particular type of Business Object.

Related concepts

Problem Workflow

Problem Form

Log a Problem - Detailed

Action Block Email Templates

Problem Saved Searches

CSM provides numerous OOTB Problem Saved Searches. Notable Problem Saved Searches include:

Saved Search	Returns	Association	Executed From
All Problems	All Problems, regardless of status.	Problem	Search Manager, Metrics, Reports, Widgets
All Top Issues	All Problems that are visible in the Portal.	Problem	Search Manager, Widgets
Known Error	Problems that are known errors (completed Diagnosis and Workaround fields).	Problem	Search Manager, Metrics
My Open Problems	Open Problems that are owned by me (Current User).	Problem	Search Manager, Metrics, Widgets
My Team Open Problems	Open Problems that are owned by a Team to which I (Current User) belong.	Problem	Metrics, Widgets
Open Problems	Open Problems.	Problem	Search Manager, Metrics, Widgets
Open: Known Error	Open Problems that are known errors (completed Diagnosis and Workaround fields).	Problem	Search Manager, Metrics, Widgets
Open: Known Error in Portal	Open Problems that are known errors visible in the Portal.	Problem	Search Manager, Metrics, Widgets
Problems Set as Global Issues	Open Problems that are Global Issues (completed Diagnosis and Workaround fields).	Problem	Search Manager, Metrics
Workaround Exists	Problems that have a defined workaround.	Problem	Search Manager

Problem Automation Processes

CSM provides the following OOTB Problem Automation Processes:

Name	Description
Notify Problem Owner of Assignment	When the Owned By Field of a Problem changes, the process initiates the Notify Owned By via E-mail One-Step Action, which sends a notification e-mail to the new owner.
Notify Problem Team of Assignment	When the Owned By Team Field of a Problem changes, the process initiates the Notify Owned By Team via E-mail One-Step Action, which sends a notification e-mail to members of the Team that owns the changed Problem.
Inactivity Escalation	Waits two days after the Last Modified Date Time Field changes, then initiates the Escalate if Inactive One-Step Action, which sends a notification e-mail to the manager of the Problem owner.
Problem - Resolve Incident	Waits for the status of a Problem to be set to Closed, then initiates the Resolve Incidents One-Step Action, which sets the status of the Incidents to Resolved and sends a notification e-mail to the Incident Customer(s).

Problem Reports

CSM provides numerous OOTB Problem Reports. Notable Problem Reports include:

Report	Description	Association	Saved Search
Problem Impact Metrics	Lists all Problems (including details) and highlights the number of Incidents linked to each Problem.	Problem	All Problems
Problem Metrics	Bar charts show the number of Problems (including details) by status, Service, impact, and category.	Problem	All Problems
Problem Summary	Bar chart shows the number of open and resolved Problems logged each quarter.	Problem	All Problems
Problem Trends	Line charts show the number of Problems each month by Service and impact.	Problem	All Problems
Problems by Category	Bar chart shows the number of Problems by category. Below the chart is a list of Problem details.	Problem	All Problems
Problems by Impact	Bar chart shows the number of Problems by impact. Below the chart is a list of Problem details.	Problem	All Problems.
Problems by Service	Bar chart shows the number of Problems by Service. Below the chart is a list of Problem details.	Problem	All Problems
Problems Linked with Incidents	Lists Problems (including details) that have linked Incidents.	Problem	All Problems
Top 10 Problems	Bar chart displays the top ten Problems based on how many Incidents are associated with each Problem ID.	Problem	All Problems
Top 10 Problems by Category	Bar charts display the top ten Problems (by category) based on how many Incidents are associated with each Problem ID.	Problem	All Problems

Service Asset and Configuration Management (CMDB)

CSM provides a Configuration Management Database (CMDB) process to ensure that all Configuration Items are effectively managed and stored in the Configuration Management Database (CMDB).

See Configuration Items.

About the Configuration Management Database (CMDB)

The Configuration Management Database (CMDB) is a repository of Configuration Items (CIs). The CMDB is an interface that assists with the management of Configuration Item (CI) Records. Use the CMDB to view, create, edit, and delete CI records. CI Records are stored alphabetically, and can be viewed in a Grid View or Record View. A Configuration Item is a Group Object comprised of different CI types. Use the CMDB to:

- Create CIs
- View CI details
- Edit CIs

For more information, refer to CMDB Features and Capabilities in the online help.

About Configuration Items

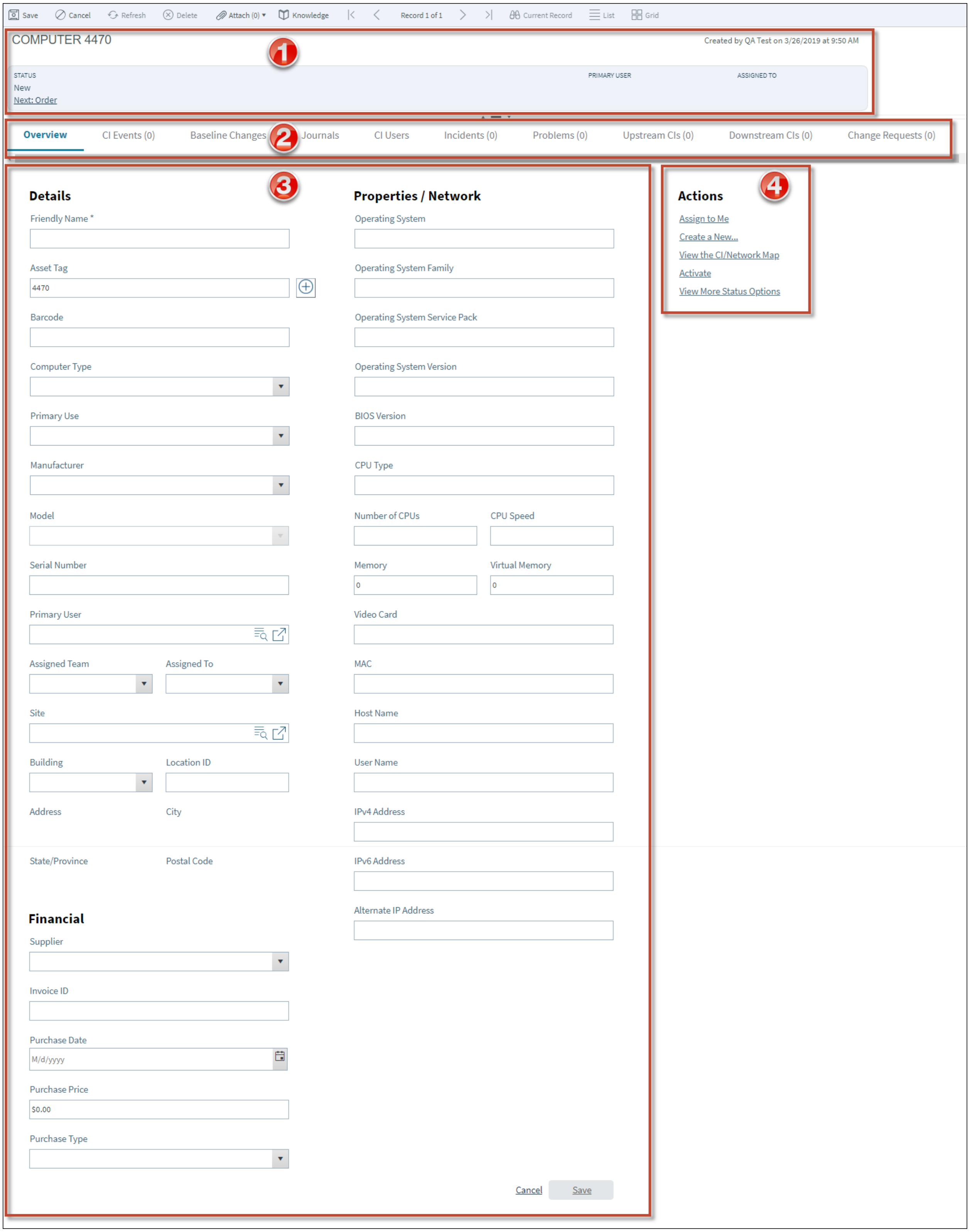
Configuration Items (CIs) are assets that make up the Configuration Management Database (CMDB). CIs must be managed to avoid disruptions to Services. Use CI forms to track and monitor the following items:

- New items
- Current items
- Retired items

There are several OOTB CI categories:

- **Computer:** Individual laptops, individual workstations, etc.
- **Mobile Device:** Company cell phones, tablets, etc.
- **Network Device:** Access points, firewalls, routers, switches, etc.
- **Printer:** Local printers, network printers.
- **Server:** Application server, file server, mail server, etc.
- **Software License:** Open source, proprietary, shareware, etc.
- **System:** Database system, network system (example: A CI System for the email system would have a relationship with each of the mail servers).
- **Telephony Equipment:** Phone, ACD, etc.
- **Other:** CIs that do not correspond with other CI categories.

The OOTB CI Forms (example: Computer) help to create, manage, and track CIs:


Save
Cancel
Refresh
Delete
Attach (0)
Knowledge
Record 1 of 1
Current Record
List
Grid
COMPUTER 4470
Created by QA Test on 3/26/2019 at 9:50 AM
STATUS
New
Next: Order
PRIMARY USER
ASSIGNED TO
Overview
CI Events (0)
Baseline Changes
Journals
CI Users
Incidents (0)
Problems (0)
Upstream CIs (0)
Downstream CIs (0)
Change Requests (0)
Details
Friendly Name *
Asset Tag
4470
Barcode
Computer Type
Primary Use
Manufacturer
Model
Serial Number
Primary User
Assigned Team
Assigned To
Site
Building
Location ID
Address
City
State/Province
Postal Code
Financial
Supplier
Invoice ID
Purchase Date
M/d/yyyy
Purchase Price
$0.00
Purchase Type
Properties / Network
Operating System
Operating System Family
Operating System Service Pack
Operating System Version
BIOS Version
CPU Type
Number of CPUs
CPU Speed
Memory
0
Virtual Memory
0
Video Card
MAC
Host Name
User Name
IPv4 Address
IPv6 Address
Alternate IP Address
Cancel
Save
Actions
Assign to Me
Create a New...
View the CI/Network Map
Activate
View More Status Options
1
2
3
4

1. Default Form: Displays information based on the type of CI.
2. Form Arrangement: Dynamically displays linked child records based on the type of CI, such as Journals, Incidents, and Problems.
3. Form Area: Displays detailed CI information based on the type of CI, such as location and network information.
4. Actions List: Dynamically displays a list of actions that are available for the current record.

CMDB Features and Capabilities

CSM CMDB has several features and capabilities:

- **Searching:** Quickly locate all CIs by running a Quick Search, or search for a particular CI or set of CIs by refining the search criteria to a word/phrase, timeframe, Customer, etc. Use Saved Search to save/run commonly-run Searches.
- **Saved Searches:** Use CI Saved Searches to quickly locate/filter CIs, or to automate searching in Reports or on Dashboards.
- **Security:** Secure CIs by controlling who can view, create, edit, and delete records.
- **Business Object:** Use the dedicated Configuration Item Business Object to track CIs, and then configure the Business Object to capture/track only what you want.
- **Forms:** Use the powerful Configuration Item Forms to create, edit, and track CIs. The form provides a Default Form area to display important information (CI type, current status, next status, Primary User, asset owner, common operations, and a Form Arrangement area to dynamically display linked records (child records) that are in a relationship with the CI (parent record).
- **Workflow:** Use the streamlined CMDB workflow to move CIs from an initial status to a final status.
- **Creation Flexibility:** Create CIs manually or through an automated process.
- **Ownership:** Assign each CI to a Primary User to ensure accountability and track assets. The Primary User is also thought of as an external Customer, technician, or internal User of an asset. In CMDB, the Customer is referred to as the Primary User.
- **Linked Records:** Link child records to a parent CI Record to ensure data relationships. Linked child records are visible in the CI Arrangement. For example, you might associate a CI with CI Events, Installed Software, Installed Services, or Drives.
- **History and Revision tracking:** Use linked Journals to track important status and field changes.
- **E-mail correspondence tracking:** Use linked Journals to track email correspondence.
- **Rich Text:** Use Rich Text to complement your Descriptions by adding formatting and images/ screenshots.
- **Actions/One-Step Actions:** Use powerful Actions and One-Step Actions to move CIs through their workflow, initiate common operations (ex: Assign ownership), email asset owners, etc. Actions/One-Step Actions are available on the CI Form (ex: CSM Desktop Client Task Pane).
- **CMDB Dashboard:** Use the CMDB Dashboard to view your critical CI metrics in a single, real-time, at-a-glance control panel. The Dashboard displays the number of CIs being repaired, the number of CIs that are down, the number of new CIs, total CMDB assets based on type, the number of CI events based on type, and the number of CIs based on vendor.
- **Reports:** Run Reports to show up-to-date statistics on the number of assets based on type (ex: Hardware, Software, etc.).
- **Automation Processes:** Use Automation Processes to automatically send notification emails and run tiered alerts.
- **Status:** Use to retire and move a CI out of an active CMDB by changing the status to inactive, retired, or disposed. Status allows the system administrator to view the lifecycle of a CI and maintain a logical history of incidents, revisions, and upgrades. The system administrator can

update the status of a CI from active to inactive and apply a no orphan to particular associated records while removing the CI from the current selection processes..

Enable or Disable the CMDB for CSM Client Users

Disable the CMDB in CSM if you are not using it.

To make the CMDB unavailable for CSM Client users, switch off one or both of these security rights:

Configuration Management Database security right:

1. Open CSM Administrator.
2. Select the **Security** category, and then select the **Edit Security Groups** task.
3. In the **Group** drop-down list, select **Admin**.
4. Select the **Rights** tab.
5. In the **Category** drop-down list, select **Configuration Management**.
6. Select the right for **Configuration Management Database** and clear the **Allow** check box.
   This disables access to the CMDB database for the Admin group.
7. Select **Save**.

View Business Object security right:

8. Open CSM Administrator.
9. Select the **Security** category, and then select the **Edit Security Groups** task.
10. Select the **Business Objects** tab.
11. In the **Business Objects** drop-down list, select **Configuration Item**.
12. Clear the **View** check box in the **General** section.
    This removes the user's ability to view the Business Object record.
13. Select **Save**.

To check your changes:

14. Log in to a CSM Client as a user with administrator rights.
15. Select **Tools** from the menu bar.
    The **CMDB** option is still visible but unavailable.
16. Create a new Incident record in the Desktop Client.
17. For the **Primary CI** field, select the **Find Related item** button  on the Related Item Picker.
    You see an error message stating `You are not authorized to view the CMDB.`

Note: These steps also prevent users from executing One-Step™ Actions that allow access to the CMDB.

Related concepts

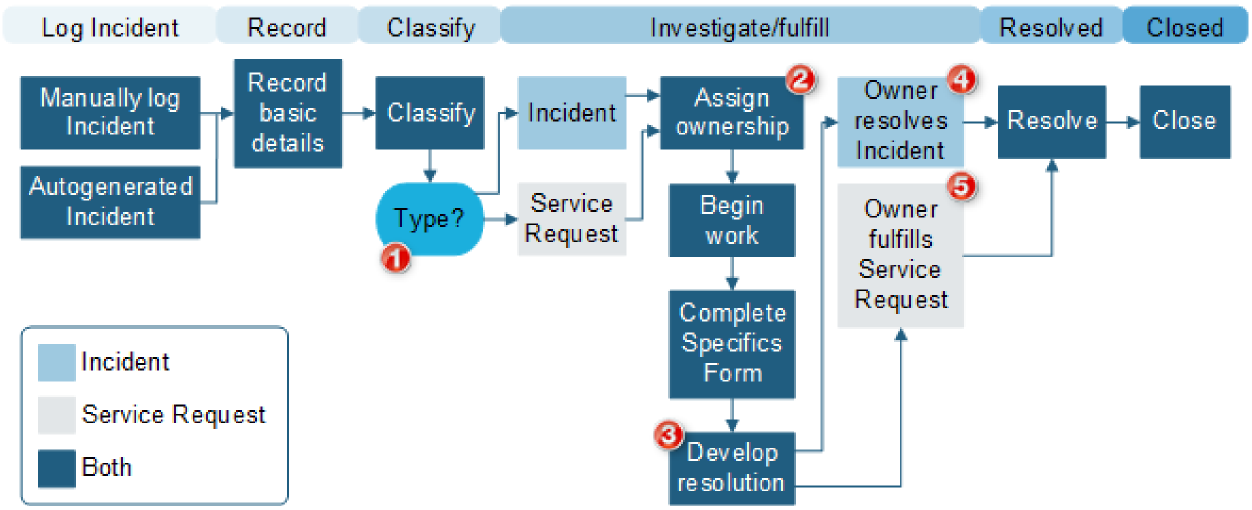
Managing Security Groups

Define Business Object Rights (Access to Data)

Configuration Item Workflow

Configuration Item (CI) assets use two distinct workflows based on their classification of either hardware or software.

The following figure shows the high-level Hardware CI (Computers, Mobile Devices, Printers, Network Devices, Servers, Systems, Telephony Equipment, and Other CIs) process workflow in the OOTB system.



Note: Access additional statuses (Stolen/MIA, In Repair, In Testing, etc.) at any time with the **View More Status options** link in the Actions list .

A CI progressing through the Hardware CI workflow encounters the following main statuses:

1. **New:** CI is being logged, and the initial details are being recorded.
2. **Ordered:** CI is being ordered.
3. **In Stock:** CI has been received.
4. **Planned:** CI use and location are being determined.
5. **In Testing:** CI is being tested.
6. **Active:** CI is operational.
7. **In Repair:** CI is being repaired.
8. **Down:** CI is being taken out of service temporarily.
9. **Stolen/MIA:** CI has been stolen or lost.
10. **Retired:** CI is being taken out of service.

The following figure shows the high-level Software CI (Software License) process workflow in the OOTB system.

A CI progressing through the Software CI workflow encounters the following main statuses:

1. **Requested:** Software License has been requested.
2. **Planned:** Software License use and location are being determined.
3. **Ordered:** Software License is being ordered.
4. **Active:** Software License is operational.
5. **Expire:** Software License is expired.

CMDB Interface

The Configuration Management Database (CMDB) interface is a tool that allows you to quickly manage Configuration Item (CI) records. Use the CMDB interface to take the following actions:

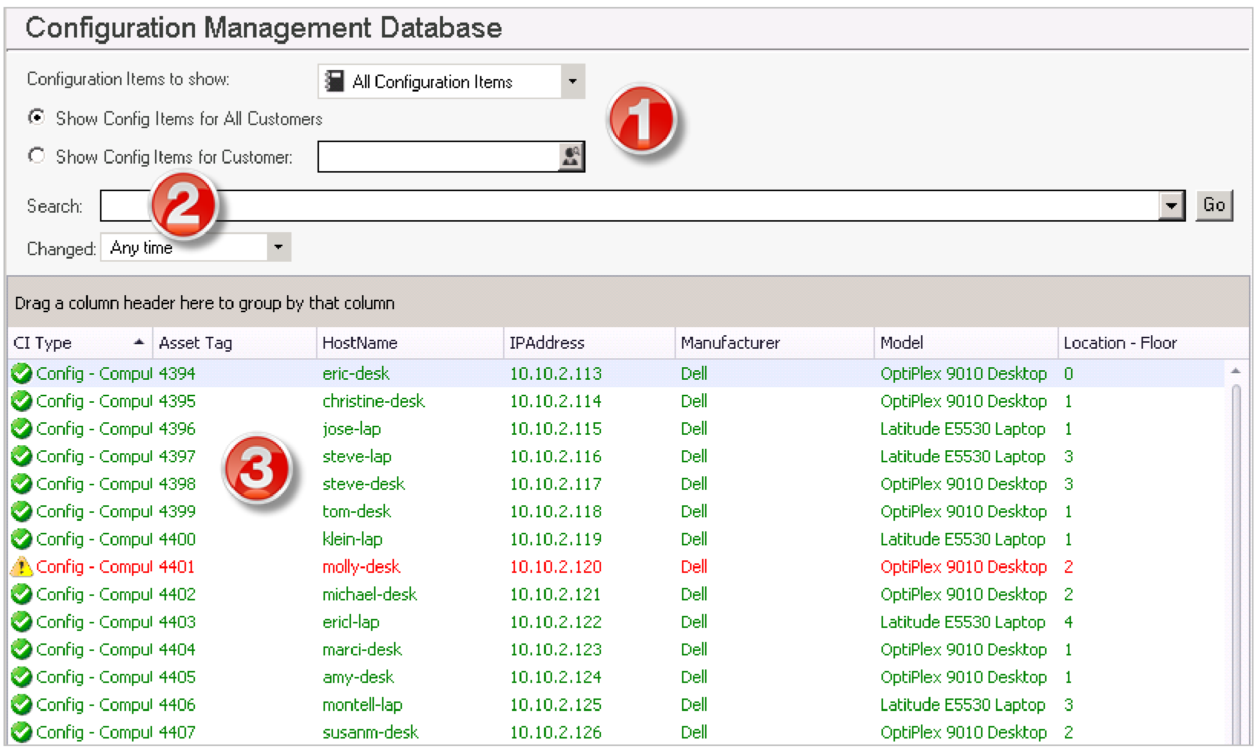
- View CI records: View a Grid list of CI records or a specific record in detail.
- Find a specific CI record using filtering and searching options.
- Create, edit, or delete a CI record.

The CMDB interface can be opened several ways from the CSM Desktop Client or Browser Client.

To open the CMDB interface:

- From the CSM Desktop Client menu bar or CSM Browser Client menu bar, click **Tools>CMDB**.
- From the Common Tasks section of the CSM Desktop Client Task Pane, click **CMDB**.

The following image shows the CMDB interface.



The

1. Filters: View all CI records, or filter by CI Type (example: Computer, Printer, and so on.), Customer (example: All or named Customer), and/or timeframe (example: Anytime, Today, Previous Month, and so on).

2. Search: Search for a specific CI record (example: Search any searchable field, such as Asset Tag, Host name, and so on).
3. Record View: Displays Grid list of CI records or a specific CI record.

Good to know:

- From the Grid, you can print, export, run an Action, sort, filter, group, size, move/reorder, and add/ remove columns. Double-click a record to display it.
- See CMDB Interface Behaviors for tips on working with CI records in the CMDB interface.

Open the CMDB Interface

1. Open the CSM Desktop Client or CSM Browser Client.
2. Select **Tools > CMDB**, or use one of the following options:
   - From the Common Tasks section of the CSM Desktop Client Task Pane, click **CMDB**.
   - From a Business Object record, click the **CI Selector** button .
   - From the Configuration Items tab in a Form Arrangement, click the **Link** button .

   The CMDB interface opens.

CMDB Interface Behaviors

Menu Bars and Toolbars

Use the CSM Desktop Client menu bar/toolbar and Browser Client menu bar/toolbar to access table management operations, such as:

- Navigating records.
- Switching between grid view and current record view.
- Adding, editing, and deleting CI records.

Context Menu (Desktop Client only)

Use the CMDB interface context (right-click) menu to quickly access common CMDB operations.

Menu Item	Description
Go to record	Displays the selected CI record. This option isn't available if you select multiple records.
Go to record in new window	Displays the selected CI record in a new window. This option isn't available if you select multiple records.
New	Creates a new CI record.
Actions	If Context Menu Actions are defined, an Actions menu item is also displayed to run Actions.
Delete	Deletes the selected CI record.
Print grid	Prints the active grid.
Export grid	Exports the active grid to a file.

Record Views

There are two views available for the CMDB interface:

- Grid list: Select **Show Results** on the toolbar to display a grid list of CI records.
- Current record: Select **Show Current Record** on the toolbar to display the selected CI record.

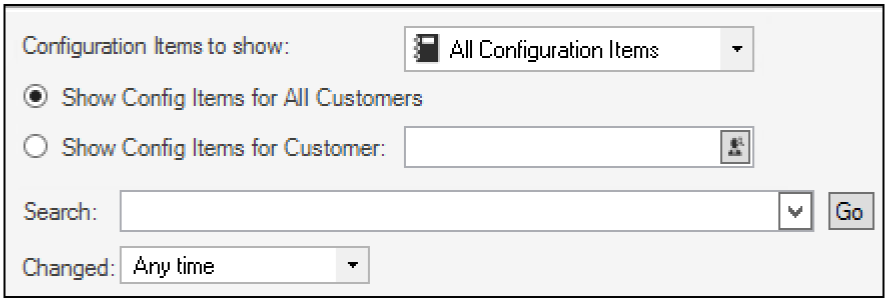
Grid Capabilities

When CI records are displayed in grid view, use the CSM grid capabilities (example: Print, export, run an Action, sort, filter, group, size, move/reorder, and add/remove columns) to display only the data you want and in a way that is meaningful to you.

Find Records

Use the filter and search options to find CI records. Display all CI records, or filter by CI Type (example: Computer, printer), customer (example: All or named customer), and/or time frame (example: Anytime, today, previous month).

To search, type a value to search in the Search box (example: Asset tab, host name), and then select **Go**.



Creating Configuration Item (CI) Records

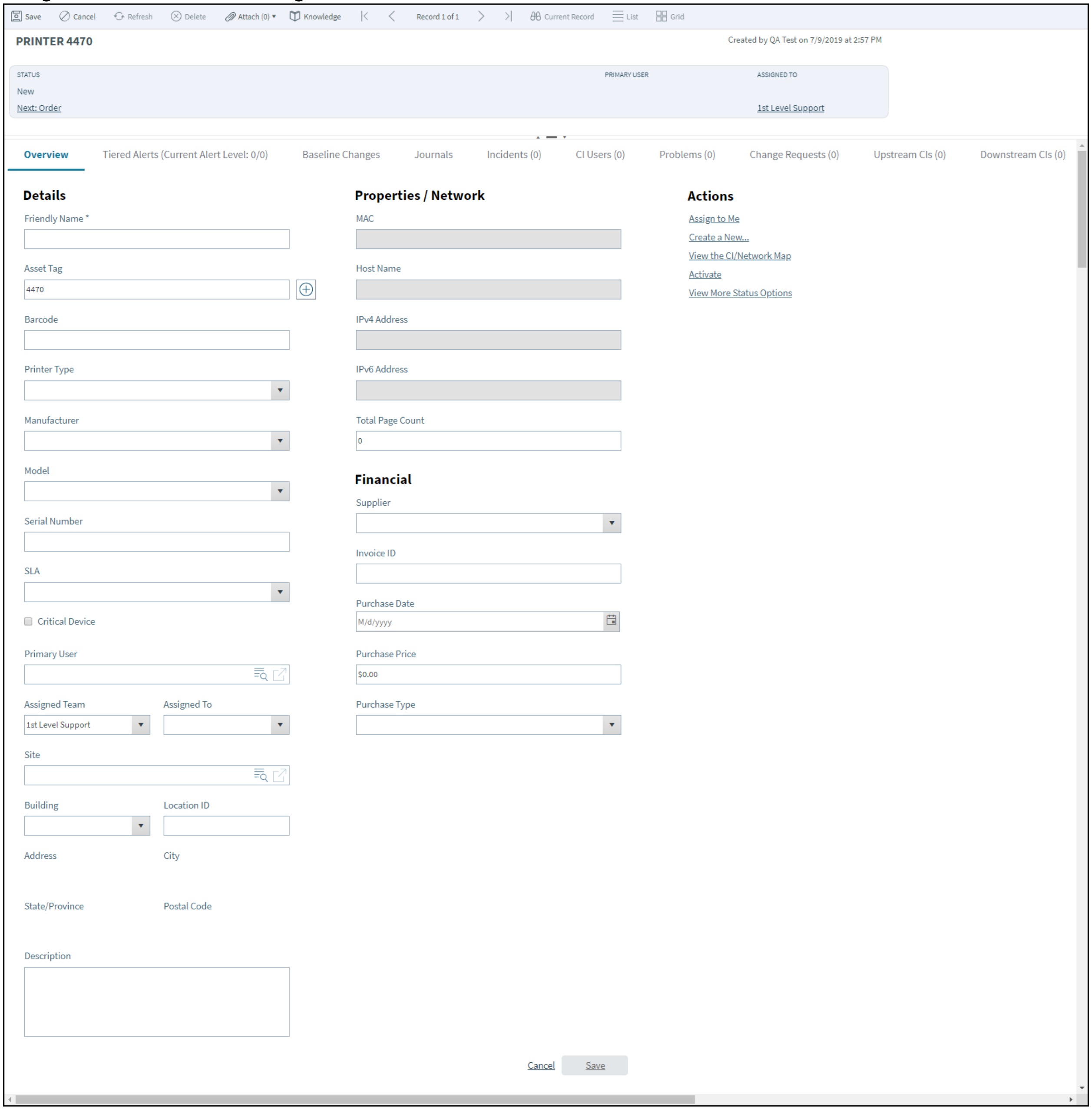
The following instructions walk through the steps to create a Printer CI Record using our OOTB workflow:

- Create a Configuration Item (CI) Record: Typical step-by-step instructions for creating a Printer CI Record.

Note: CSM provides OOTB CMDB workflows with all the features needed to successfully manage CIs. Use these workflows as-is, or tailor them to meet organizational needs.

Create a Configuration Item (Printer)

Hardware forms and Software forms vary based on the specific Configuration Item (CI). The following image shows a Printer Configuration Item form.



To create a CI:

1. On the CSM Desktop Client toolbar, click **New > New Configuration Item**, and then select a **CI** (ex: New Config - Printer).

Tip: Another way to create a CI is to click **File > New > New Configuration Item > New Config - Printer** from the CSM Desktop Client menu bar.

A CI Record is created with a unique Asset Tag ID (ex: 4476) and a status of New.

Note: An Asset Tag can be auto-generated or provided by an administrator to customize it for business needs.

2. Enter a name for the CI in the **Friendly Name** field.
3. Select a **Primary User**:
   a. Primary User: Provide the name (ex: Gina) of the person who initiated the Change (not the creator of the record), and then press **Enter** or **Tab** to search for the Customer Record.

      If an exact match is found, the Primary User Fields are auto-populated with the Customer's name and e-mail. If multiple matches are found (ex: Multiple Customers named Gina), the Contact Manager opens to select the appropriate Customer.

      Note: The Primary User is also thought of as a Customer, technician, or internal User of an asset. In CMDB, the Customer is referred to as the Primary User.

4. Select an Assigned Team and Assigned Owner for the CI from the drop-down menus.

   Note: Select **Assign to Me** in the Actions List to make yourself the CI owner.

5. The CI owner records the initial CI details.

   Tip: Fields with drop-down arrows are populated based on Lookup Table values in Table Management. Add, edit, or delete Field values by selecting the Field, and then pressing **F3**.

6. The asset owner orders the CI:
   a. In the Default Form beneath **Status**, click **Next: Order**.

      The CI status changes to Ordered.

7. When the CI is received, the asset owner identifies the CI as in stock:
   a. In the Default Form beneath **Status**, click **Next: Mark as In Stock**.

      The CI status changes to In Stock.

      Note: If the CI needs to be tested before becoming operational, click **View More Status Options** in the Actions List. The CI Status Selector opens. Click **In Testing**, and then click **OK**. The status changes to In Testing.

Note: If the CI is stolen or lost, click the **View More Status Options** link in the Actions List to access the CI Status Selector, and then select the **Stolen/MIA** status.

8. Owner plans the use and location of the CI:
   a. In the Default Form beneath **Status**, click **Planned**.

      The CI status changes to Planned.

Note: If the CI needs to be tested before becoming operational, click **View more status options** in the Actions List. The CI Status Selector opens. Click **In Testing**, and then click **OK**. The status changes to In Testing.

9. When ready, owner activates the CI:
   a. In the Default Form beneath **Status**, click **Next: Activate**.

      The CI status changes to Active.

Note: If the CI needs to be repaired while active, click the **Mark as "In Repair"** link in the Actions list. The status changes to In Repair.

10. (Optional) Owner deactivates the CI:

    Note: A CI is typically deactivated when it must be taken out of service temporarily (ex: Primary User leaves the organization).

    a. In the Default Form beneath **Status**, click **Bring Down**.

       The status changes to Down.

       Tip: CSM provides multiple OOTB Automation Processes that use Tiered Alerts to help manage CIs when they are out of service (status is Down). Use these Automation Processes, edit them, or create them to fit the organizational needs.

11. (Optional) Asset Owner retires the CI:

    Note: A CI is typically retired when it must be taken out of service permanently (ex: Printer is replaced).

    a. In the Actions List, click the **View More Status Options** link.

       The CI Status Selector opens.

    b. Click the **Retired** status.

    c. Select **OK**.

The CI status changes to Retired.

CMDB Design Ideas

CSM provides OOTB CI workflows with all the items you need to successfully create CIs. Use these workflows, or tailor them to meet organizational needs. Design ideas include:

- **Fields:** Change which fields are required and when, which fields support Rich Text, and more.
- **View Counter:** Incrementally track the number of times a record is viewed by a customer or user in the Desktop Client, Browser Client, and CSM Portal. View counter functionality is configured in CSM Administrator.
- **Statuses:** Change CI statuses and/or the One-Step Actions that are initiated when a CI enters each status.
- **Form:** Change the form theme (background and text color), tab order, and size. Change the threshold and/or colors for Open Incidents logged against a CI.
- **Actions and One-Step Actions:** Create Actions/One-Step Actions to automate the workflow.
- **Email:** Change the email templates that are used to create the emails sent by One-Step Actions or Automation Processes. Or, disable/change when and to whom notifications are sent (example: Send a notification to computer owners when their CI Record changes).
- **Field Value Options:** Use Table Management to add/edit Lookup Object values for use in drop-downs (example: Computer Manufacturer).
- **Visualizations:** Add, remove, or edit Upstream or Downstream Relationship options.

Note: Detailed step-by-step instructions for the above is beyond the scope of this document.

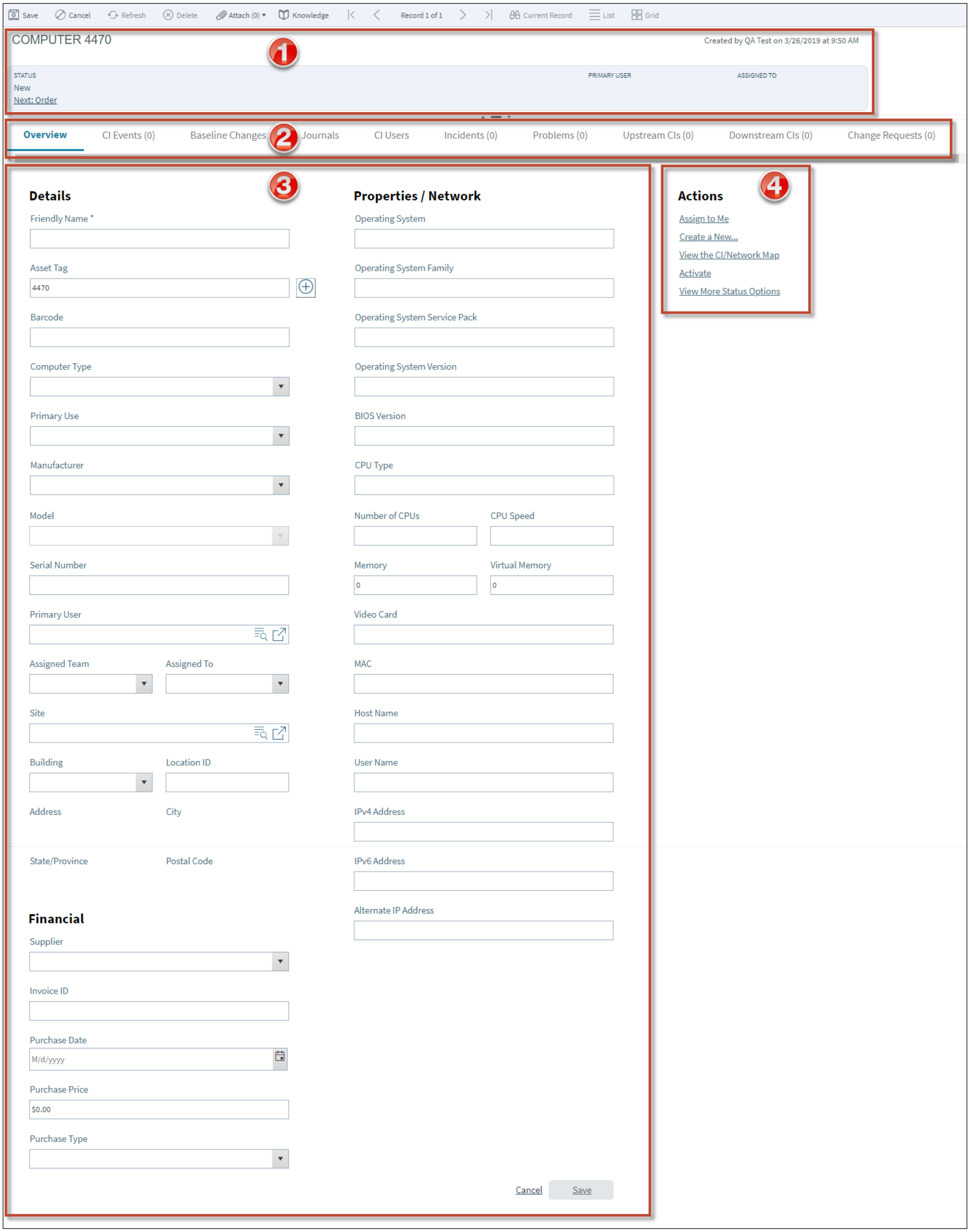
CMDB Features

CSM provides the following tools to help manage the CMDB:

CMDB Forms

Use the Configuration Item Forms (example: Computer) to create, edit, and track Configuration Items (CIs). The forms are made up of four main areas:

1. Default Form: Displays information based on the type of CI.
2. Form Arrangement: Dynamically displays linked child records based on the type of CI, such as Journals, Incidents, and Problems.
3. Form Area: Displays detailed CI information based on the type of CI, such as location and network information.
4. Actions List: Dynamically displays a list of actions that are available for the current record.


Save
Cancel
Refresh
Delete
Attach (0)
Knowledge
Record 1 of 1
Current Record
List
Grid
COMPUTER 4470
Created by QA Test on 3/26/2019 at 9:50 AM
1
STATUS
New
Next: Order
PRIMARY USER
ASSIGNED TO
Overview
CI Events (0)
Baseline Changes
2
Journals
CI Users
Incidents (0)
Problems (0)
Upstream CIs (0)
Downstream CIs (0)
Change Requests (0)
3
Details
Friendly Name *
Asset Tag
4470
Barcode
Computer Type
Primary Use
Manufacturer
Model
Serial Number
Primary User
Assigned Team
Assigned To
Site
Building
Location ID
Address
City
State/Province
Postal Code
Financial
Supplier
Invoice ID
Purchase Date
M/d/yyyy
Purchase Price
$0.00
Purchase Type
Properties / Network
Operating System
Operating System Family
Operating System Service Pack
Operating System Version
BIOS Version
CPU Type
Number of CPUs
CPU Speed
Memory
0
Virtual Memory
0
Video Card
MAC
Host Name
User Name
IPv4 Address
IPv6 Address
Alternate IP Address
Cancel
Save
Actions
4
Assign to Me
Create a New...
View the CI/Network Map
Activate
View More Status Options

The following table describes common fields on the CI Form:

Field	Description	Comments
Default Form	Displays information about the item based on status and ownership.	
Primary User	User assigned to the CI.	The asset is owned by a group or manager within an organization (ex. IT). The Owned By Team assigns the asset to a Primary User to use. The Primary User does not own the asset.
Primary User Name	Name of the Primary User who uses the CI. The User assigned the asset by the organizational owner (see Owned by). Provide a name in the Primary User field (ex: Gina), and then press **Enter** or **Tab** to locate the Customer Record. **Note:** Wildcards like % or * can be used with partial information. If an exact match is found, the information autopopulates the Requestor, Phone, and E-mail fields. If multiple matches are found (ex: Multiple Customers named Gina), the Contact Manager opens so that the technician can select the appropriate one.	
Form Area	Displays detailed CI information.	Fields in this area vary based on the type of CI. These fields are completely customizable and configurable.
Details	General CI details. Complete the necessary information. Only Friendly Name is required.	For example, the Computer CI uses Asset Tag, Manufacturer, Serial Number, Operating System information, etc.
Friendly Name	Name for the CI.	This name is displayed in the Default Form with the Asset Tag and the Record Type.
Asset Tag	Identification number for the CI.	
Properties/ Network	Component details specific to the CI type. Complete the necessary information. No fields are required.	For example, the Computer CI uses CPU information, Memory, Vendor, Barcode, etc.
Financial	Purchase details. Complete the necessary information. No fields are required.	For example, the Computer CI uses Vendor, Invoice ID, Purchase Date, Purchase Type, and Purchase Price.

Field	Description	Comments
Actions List	Common operations (initiate Actions/One-Step Actions).	
Assign to me	Click the **link** to make yourself (Current User) the Owned By User of the asset.	One-Step Action (Take Ownership): Makes the Current User the Primary User of the record.
Create a new	Opens a prompt dialog box to log a Change Request, Incident, or Problem.	
View the CI/ Network Map	Opens the Configuration Item dialog box that includes a visualization of the CIs.	
Activate	Sets the CI as active.	

CMDB Tiered Alerts

Tiered Alerts are tools used to manage CI behaviors when a defined event occurs (example: When a CI status changes to Down, an alert might send a notification e-mail to the Record Owner). Alerts are tiered because they can be configured to initiate a sequential set of Commands/Actions/One-Step Actions at timed intervals. The alerts continue to increment (based on defined intervals) until the defined event is no longer valid.

Good to know:

- Tiered Alerts are available for the following CI Records: Network Device, Printer, System, Telephony Equipment, and Other CIs.
- Tiered Alerts require an Automations Process to define the event (example: CI status changes to Down) that initiates the alert. CSM provides multiple OOTB Automation Processes that use Tiered Alerts. For more information, see CMDB Automation Processes.
- Add up to 99 Tiered Alerts.
- View defined Tiered Alerts in Grid form by clicking **View>Grid View** in the Tiered Alerts tab of the Arrangement.

To define Tiered Alerts:

1. Open a CI record (New>New Configuration Item>New Config - [CI type]).
2. Click the **Tiered Alert tab** in the Arrangement.
3. Click the **New Tiered Alert** button.

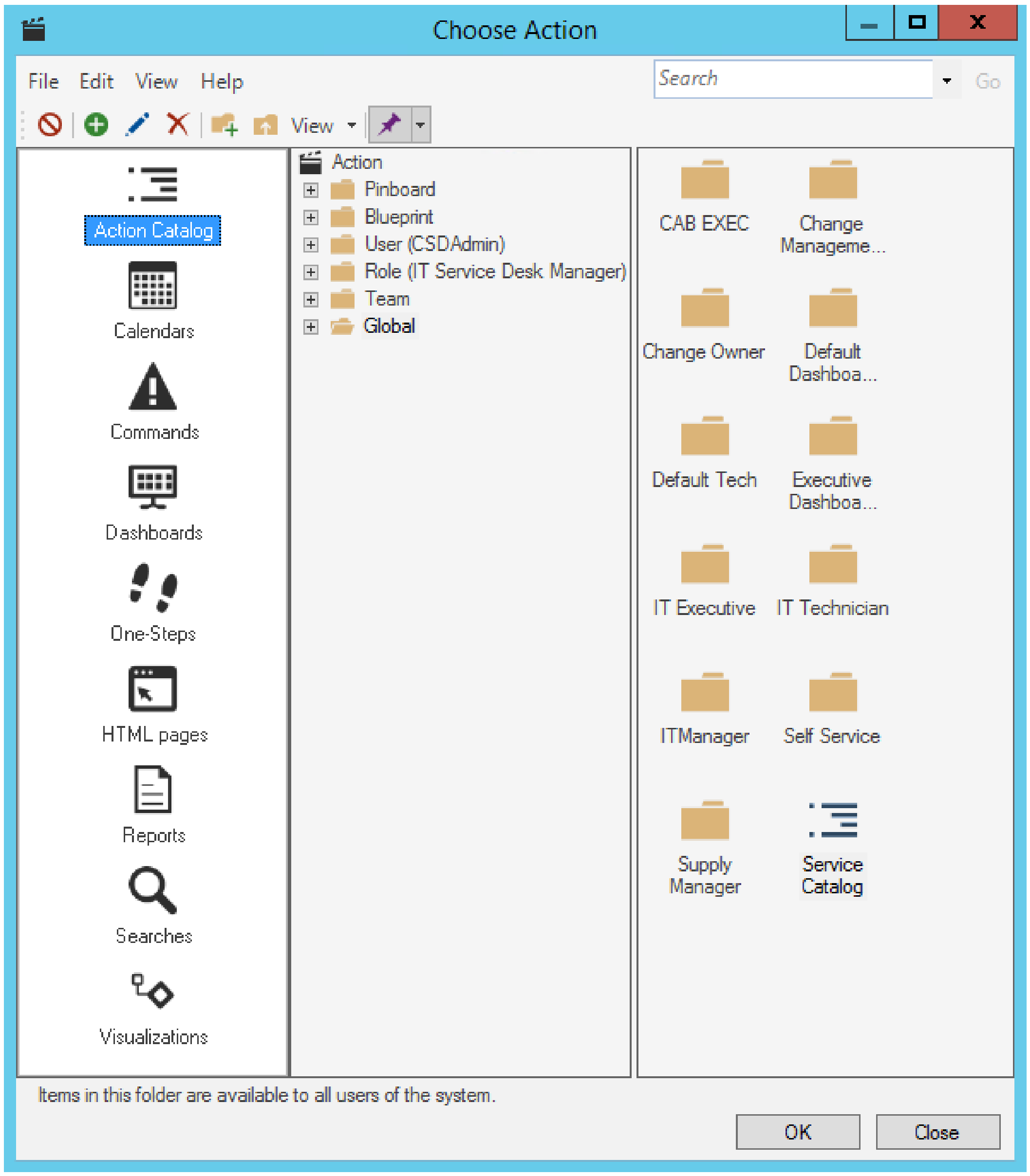
   The Tiered Alert form opens.

4. Define the first tier:
   a. Alert Order: Click the **Up arrow** to select the tier level (example: 1).

b. Alert Action: Select a **Command**, Action, or One-Step Action to take place when the Tiered Alert is initiated (example: Send E-Mail):
   i. Click the **Action Selector** button to access the Action Manager.

   The Action Manager Opens.



   ii. Click the Command, Action, or One-Step Action to execute (example: Send E-Mail Command).

   iii. Select **OK**.

The Command, Action, or One-Step Action opens in the Alert Action field.

Note: The Wait time from previous alert field is disabled since this is the first defined alert.

5. Define the second tier:
    a. Alert Order: Click the Up arrow to select the tier level (example: 2).
    b. Alert Action: Select a Command, Action, or One-Step Action to take place when the Tiered Alert is initiated.
        i. Click the **Action Selector** button to access the Action Manager.

           The Action Manager Opens.

        ii. Click the **Command**, **Action**, or **One-Step Action** to execute (example: New Incident One-Step Action).

        iii. Select **OK**.

           The Command, Action, or One-Step Action opens in the Alert Action field.

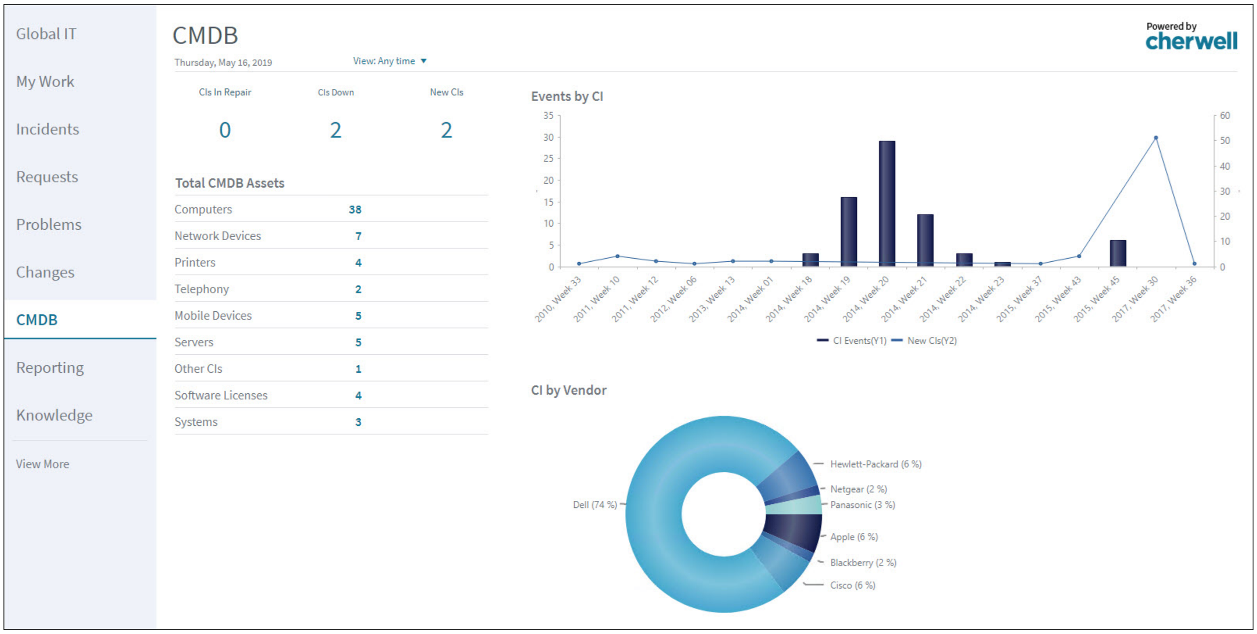
c. Define the Wait Time from Previous Alert:
   i. In the first field, provide a number to indicate the number of minutes, hours, or days that CSM should wait (after the first Tiered Alert) before initiating the second alert (example: 2).

   ii. In the second field, click the drop-down menu to reveal timeframe options, and then select a timeframe (Minutes, Hours, Days).

   The Tiered Alert record is automatically saved.

CMDB Dashboard

CSM provides a OOTB CMDB Dashboard that intuitively organizes your critical CI metrics into a single, real-time, at-a-glance CMDB control panel.



Note: CMDB metrics are also found on other OOTB Dashboards (ex: Global IT).

The following table describes the items on the Dashboard:

Item	Description	Widget Type	Widget Name	Widget Uses:
CIs In Repair	Displays the number of CIs with an Asset Status of In Repair.	Text Gauge	CI in Repair	Custom Saved Search
CIs Down	Displays the number of CIs with an Asset Status of Down.	Text Gauge	Current Down CIs	CIs Currently Down Saved Search
New CIs	Displays the number of CIs with an Asset Status of New.	Text Gauge	New CIs	Custom Saved Search
Events by CI	Displays the number of CI Events by week (bars within the chart) and New CIs (line within the chart).	Bar with Line Chart	CI Events vs. New CIs	All Events Saved Search, All Assets Saved Search

Item	Description	Widget Type	Widget Name	Widget Uses:
CI by Vendor	Displays the percentage of CIs based on Vendor.	Pie Chart	CI by Vendor	Hardware with Manufacture Saved Search
Total CMDB Assets	Displays the number of assets based on type.	Text Gauge	Uses the following Widgets: • CMDB Computers in last 30 days • CMDB Network Devices in last 30 days • CMDB Printers in last 30 days • CMDB Telephony in last 30 days • Copy of Mobile in CMDB • Copy of Servers in CMDB • Other CIs in CMDB • Software in CMDB • System in CMDB	Uses the following Saved Searches: • All Computers • All Network Devices • All Printers • All Telephony Equipment • All Mobile Equipment • All Server Equipment • All Other CIs • All Software • All System CIs
View	Filters Dashboard metrics by a defined date range.	Filter	CD - Date Filter - 30 Day Default	

CMDB One-Step Actions

CSM provides multiple One-Step Actions associated with CIs, including:

One-Step Action	Description/Actions	Associations	Executed From
Status			
Alt Step from Relationship	Conditionally change the CI status to next logical status (defined by the CI Status values in Table Management) and/or initiate the next appropriate One-Step Action.	[CI]	CI Form: Next: [Status]
Alt 2 Step from Relationship			
Next Step from Relationship			
Form			
Ownership			
Assign to ANY Individual	Prompts the User to assign the record to any CSM User (not limited by Team). Uses Owned By ID and Owned By Team fields.	[CI]	CI Form: Assign To link
Assign to Individual	Launches the Choose Team window, where a user can choose an Owned By Team for the record; then, launches the Choose User window, where a user can choose a Primary User from the already-selected Team.	[CI]	CI Form: Select Owner link
Assign to Team	Launches the Choose Team window, where a user can choose an Owned By Team for the record.	[CI]	CI Form: Select Team link
Take Ownership	Makes the Current User the Primary User of the record.	[CI]	CI Form: Take Ownership link
Other			
DateTime Info Popup	Displays details for all the date/timestamps to give a historical view.	[CI]	CI Form: View Detailed Date/Time Information link
Create a new...	Prompts the User to create a new Incident, Problem, or Change. **Note:** This One-Step Action is only applicable for hardware CIs.	[CI]	CI Form: Create a new... link

A full list of One-Step™ Actions is beyond the scope of this document. Export a schema document from CSM Administrator (**Create a Blueprint > Tools > Export Schema**) to view a full list of One-Step Actions associated with a particular type of Business Object.

CMDB Saved Searches

CSM provides the following OOTB CI Saved Searches:

Saved Search	Returns	Association	Executed From
All Assets	All CIs, regardless of type.	Configuration Item	Search Manager, Reports, Widgets
Assets with Linked Incidents	CIs with at least one related Incident.	Configuration Item	Search Manager, Reports
CIs Currently Down	CIs with an Asset Status of Down.	Configuration Item	Search Manager, Widgets
Computers and Systems	Computer and System CIs.	Configuration Item	Search Manager, Reports
Critical CIs	CIs marked as Critical.	Configuration Item	Search Manager
Hardware	Hardware CIs.	Configuration Item	Search Manager, Reports
Items with BIOS	CIs that have a BIOS Version number.	Configuration Item	Search Manager, Reports
Software	Software License CIs.	Configuration Item	Search Manager, Reports
Software Compliance	CIs where the number of Users is less than the number of Software Licenses in use .	Configuration Item	Search Manager

CMDB Automation Processes

CSM provides the following OOTB CMDB Automation Processes:

Name	Description
Notify Owner of Computer Change	When any Field of a Config - Computer Record changes, the process initiates the Send Computer Change Notification E-mail One-Step Action, which sends a notification e-mail to the owner of the Config - Computer Record.
Tiered Alert - Computer Down	Waits for the CI status to change to Down, and then increments the Alert Level (or aborts the process) based on the configuration in CSM (Arrangement section of the Config - Computer Business Object).
Notify Owner of Network Device Change	When any Field of a Config - Network Device Record changes, the process initiates the Send Device Change E-mail One-Step Action, which sends a notification e-mail to the owner of the Config - Network Device Record.
Tiered Alert - Network Device Down	Waits for the CI status to change to Down, and then increments the Alert Level (or aborts the process) based on the configuration in CSM (Arrangement section of the Config - Computer Business Object).
Tiered Alert - Printer Down	Waits for the CI status to change to Down, and then increments the Alert Level (or aborts the process) based on the configuration in CSM (Arrangement section of the Config - Printer Business Object).
Tiered Alert - Server Down	Waits for the CI status to change to Down, and then increments the Alert Level (or aborts the process) based on the configuration in CSM (Arrangement section of the Config - Server Business Object).
Tiered Alert - System Down	Waits for the CI status to change to Down, and then increments the Alert Level (or aborts the process) based on the configuration in CSM (Arrangement section of the Config - System Business Object).
Tiered Alert - Telephony Equipment Down	Waits for the CI status to change to Down, and then increments the Alert Level (or aborts the process) based on the configuration in CSM (Arrangement section of the Config - Telephony Equipment Business Object).
Tiered Alert - Other CI Down	Waits for the CI status to change to Down, and then increments the Alert Level (or aborts the process) based on the configuration in CSM (Arrangement section of the Config - Other CI Business Object).

CMDB Reports

CSM provides the following OOTB CMDB Reports:

Report	Description	Association	Saved Search
OS Report	Lists Hardware assets and details.	Configuration Item	Hardware
BIOSVersions	Lists CIs that have a BIOS Version number.	Configuration Item	Items with BIOS
Computer Memory Audit	Lists Physical Memory and Virtual Memory of Computer and System assets.	Configuration Item	Computers and Systems
CI Change Request Metrics	Bar Chart of Top 5 CIs with large numbers of associated Change Requests.	Configuration Item	All Assets
CI Summary Report	Lists all Hardware CIs by Vendor.	Configuration Item	Hardware
CPU Speed Report	Lists CPU Speed and number of CPUs of Computer and System assets.	Configuration Item	Computers and Systems
Software Summary	Lists software summary information, including Asset Tag, Version, Number Assigned to Users, and Number of Licenses.	Configuration Item	Software
Incidents by Configuration Item	Lists CIs with linked Incidents and includes information such as Asset Tag, Manufacturer, and Model.	Configuration Item	Assets with Linked Incidents

Related tasks
Report on Groups with Relationships with Themselves

CMDB Installed Software

Use CMDB Installed Software to view Installed Software on the selected Computer or Server.

To locate CMDB Installed Software:

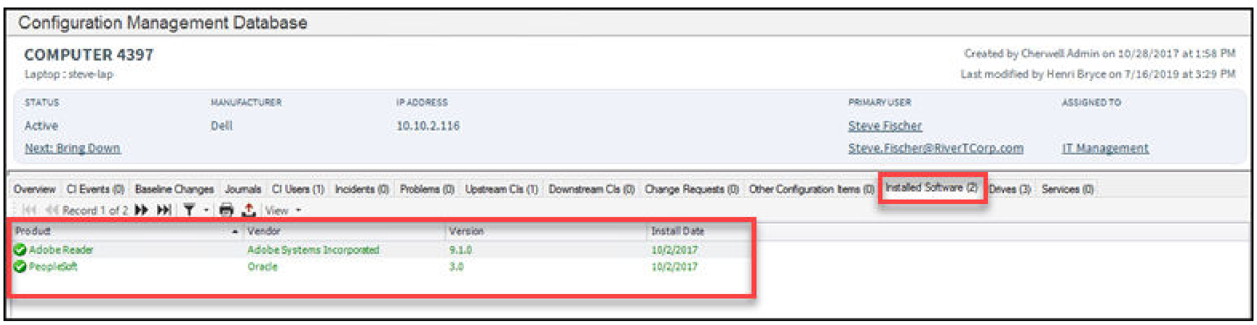
1. In CSM Desktop Client or CSM Browser Client, select **Tools > CMDB**.
2. In the **Configuration Items to show** drop-down list, select **Config-Computer** or **Config-Server**.
3. Double-click any Computer or Server in the list.
4. Select the **Installed Software** page.
5. To view the Installed Software form:
    - Double-click the Installed Software in the grid.

      OR

    - Select the Installed Software in the grid and select **View > Form View**.

Installed Software Grid

Use the CMDB Installed Software grid to view Installed Software on the selected Computer or Server.

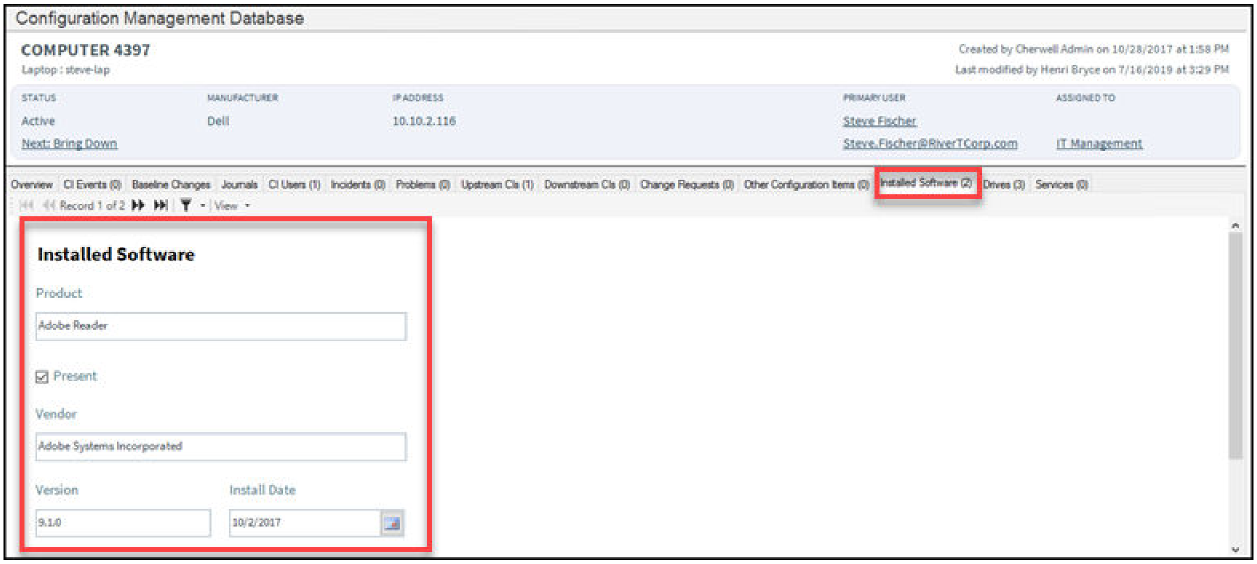


The following table describes the columns in the grid.

Column	Description	Comments
Product	The software product name as defined on the Installed Software Form.	For more information, see About CMDB.
Vendor	The Vendor for the software product as defined on the Installed Software Form.	
Version	The Version of the software product as defined on the Installed Software Form.	
Install Date	The Install Date of the software product as defined on the Installed Software Form.	

Installed Software Form

Use the CMDB Installed Software form to view or modify the Installed Software on the selected Computer or Server.



The following table describes the fields on the form.

Field	Description	Comments
Default Form	Lists the Product, Vendor, Version, and Install Date of the installed software.	For more information, see About CMDB.
Product	Type the Product Name for the installed software.	
Present	Select this box if the installed software is present.	
Vendor	Type the name of the Vendor for the installed software.	
Version	Type the Version of the installed software.	
Install Date	Select the Date the software was installed.	

CMDB Installed Services

Use CMDB Installed Services to view Installed Services on the selected Server.

To locate CMDB Installed Services:

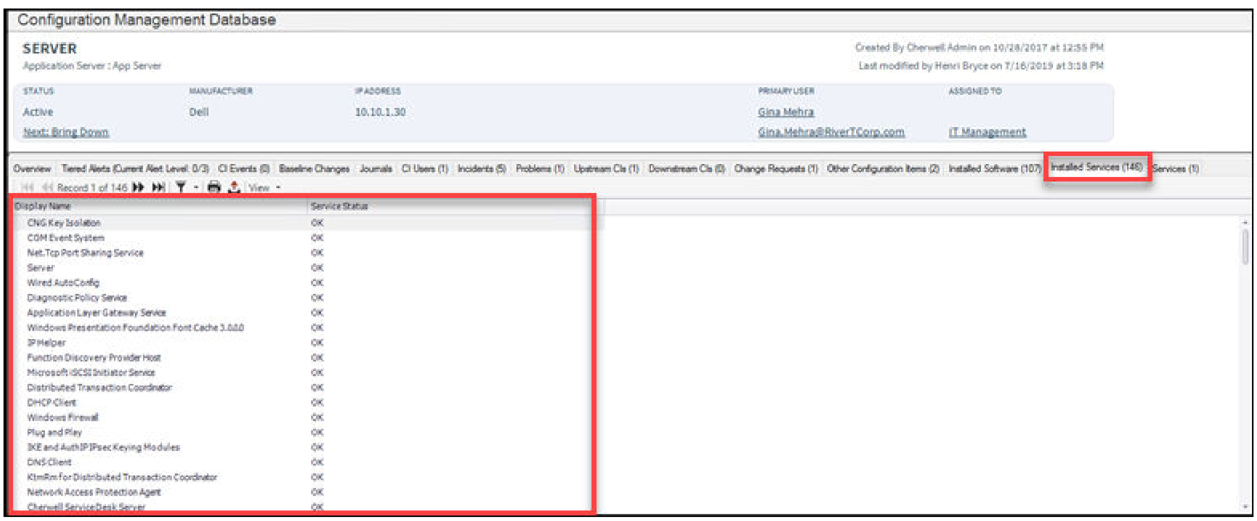
1. In CSM Desktop Client or CSM Browser Client, select **Tools > CMDB**.
2. In the **Configuration Items to show** drop-down list, select **Config-Server**.
3. Double-click any Server in the list.
4. Select the **Installed Services** page.
5. To view the Installed Service form:
    - Double-click an Installed Service in the grid.

      OR

    - Select an Installed Service in the grid and select **View > Form View**.

Installed Services Grid

Use the CMDB Installed Services grid to view Installed Services on the selected Server.

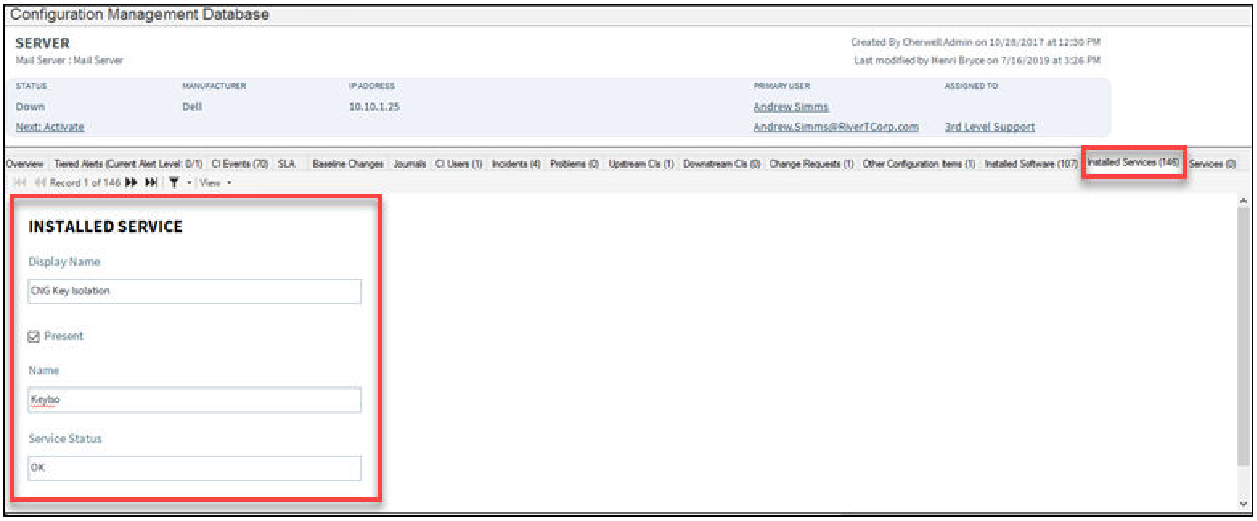


The following table describes the columns in the grid.

Column	Description	Comments
Display Name	The Display Name as defined on the Installed Service Form.	For more information, see About CMDB.
Service Status	The Service Status as defined on the Installed Service Form.	

Installed Service Form

Use the CMDB Installed Service form to view or modify an Installed Service for the selected Server.



The following table describes the fields on the form.

Field	Description	Comments
Default Form	Define the Display Name and Service Status for the installed service.	For more information, see About CMDB.
Display Name	Type the Display Name for the installed service.	
Present	Select this box if the installed service is present.	
Name	Type the Name for the installed service.	
Service Status	Type the Service Status for the installed service.	

Agreement Management

Agreement management is the process that allows users to mange individual Operational Level Agreements (OLAs) and Underpinning Contracts (UCs).

About Agreements

An Agreement is a record that defines the terms of service between the service desk and a Supplier. An Operational Level Agreement (OLA) is a service agreement between the service desk and another entity (ex: Team, department, etc.) within the same organization. An Underpinning Contract (UC) is a service agreement between an organization and a third-party service provider. Agreements are directly related to Suppliers and include Terms, including rules for changes to the Agreement, rules for termination of the Agreement, and service availability.

In CSM, Agreement is a Group Object that includes two Major Objects: OLA and Underpinning Contract. The OLA form and Underpinning Contract form share fields and functionality and are used to view and manage each type of Agreement separately:

Note: Agreement can be used to support Multi-Sourcing Service Integration (MSI) and Service Integration and Management (SIAM). For more information, see The Relationship between CSM and Multi-Sourcing Service Integration and Service Integration and Management.

Agreements Good to Know

Good to know:

- Search for one or more Agreements that meet a specific criteria by running a Quick Search or Saved Search.
- Create a new Operational Level Agreement by clicking **New>New Agreement>New OLA** on the CSM Desktop Client toolbar, or by clicking **File>New>New Agreement>New OLA** from the CSM Desktop Client or Browser Client menu bar.
- Create a new Underpinning Contract by clicking **New>New Agreement>New Underpinning Contract** on the CSM Desktop Client toolbar, or by clicking **File>New>New Agreement>New Underpinning Contract** from the CSM Desktop Client or Browser Client menu bar.

Note: Operational Level Agreements are Agreements with an internal Supplier. Underpinning Contracts are Agreements with an external Supplier. The steps in this document can be used to create either an OLA or a UC.

- When on a record, you can send an e-mail directly to the current Supplier by clicking the Supplier's e-mail address in the Default Form.
- The Supplier tab contains the Supplier's full record as it is seen in the Supplier Selector.
- Journals track what occurs during the record's lifecycle (example: Notes to track progress or comments). View or add Journals by clicking the **Journals** tab in the record's Arrangement. The Journals associated with Agreements track Owner notes/comments.
- Attachments supplement records by providing additional details in the form of linked/imported files (.pdf, .doc, etc.), images, web pages, and Document Repositories. View and manage Attachments using the Attachment button and Attachments bar.
- The Status in the Default Form indicates the current phase of the Agreement as it moves through its workflow.
- Press **TAB** to move to the next field on the form.
- Fields:
  - The Description field is a Rich Text field. To format the text or embed an image, click the **Zoom** button.
- The OOTB system implements several Actions/One-Step™ Actions to make creating Operational Level Agreements and Underpinning Contracts more efficient. For more information about Actions and One-Step™ Actions, refer to the Actions/One-Step™ Actions documentation.

  Note: A full list of One-Step™ Actions and Fields is beyond the scope of this document. Export a schema document from CSM Administrator (Create a Blueprint>Tools>Export

Schema) to view a full list of One-Step Actions or Fields associated with a particular type of Business Object (example: Major).

Create an Agreement

The following procedure provides steps for creating an Agreement.

To create a new OLA or Underpinning Contract:

1. On the CSM Desktop Client toolbar, click **New>New Agreement>New OLA** (or **Underpinning Contract**).

   A new Agreement is created with a status of New.

2. You can take ownership of the Agreement by clicking the **Assign to Me** link under Actions
3. Provide details about the Agreement:
   a. **Name**: Provide a name for the Agreement.

   b. **Supplier**: Provide the name (example: Hardware Support) of the Team that will be responsible for fulfilling the Agreement.

      Note: To browse for a Supplier or add a new Supplier Record, click the **Related Item Picker** button . The Supplier tab in the Form Arrangement contains an overview of the Supplier record. To view the selected Supplier's detailed Supplier Record, click the **Quick View** button . Detailed Supplier information is populated in the Supplier tab in the Form Arrangement.

   c. **Supplier Catalog Item Type**: Select a Supplier Catalog Item Type from the drop-down (example: Product or Service).

   d. **Supplier Catalog Item**: Select the Supplier Catalog Item from the Selector tool (example: Laptop, SQL Server).

      Note: New Supplier Catalog Items can be created from the Supplier Catalog Item Selector or by using the Supplier Catalog Item Form (Supplier Catalog Items are limited by the Supplier Catalog Type). For more information about Supplier Catalog Item, refer to About Supplier Catalog Items documentation.

   e. **Description**: Provide a description of the Agreement.

   f. **Start Date**: Click the **Calendar Date Selector** button to select a start date for the Agreement.

   g. **End Date**: Click the **Calendar Date Selector** button to select an end date for the Agreement.

   h. **Review Date**: Click the **Calendar Date Selector** button to select a review date for the Agreement.

   i. **Scope**: Provide the scope of the Agreement.

   j. **Assigned Team**: Select a team.

   k. **Assigned To**: Select a member of the Assigned Team.

4. Provide terms for changing or terminating the Agreement:
   a. **Rules for Changes**: Provide the negotiated and agreed upon rules for changing the Agreement.
   b. **Rules for Termination**: Provide the negotiated and agreed upon rules for terminating the Agreement.
5. Provide Availability details:
   a. **Service Availability**: Provide the time(s) that the service is to be available.
   b. **Service Uptime**: Provide the uptime for the service.
   c. **Service Availability Exception(s)**: Provide the exception(s) for when the service will not be available.
6. Provide Cost and Performance information:
   a. **Resolution Time**: Provide the resolution time.
   b. **Resolution Units**: Provide the units to be applied to the resolution time (example: Minutes, hours, days, or weeks).
   c. **Resolution Business Hours**: Click the Business Hours Manager button to select the business hours that will count against the resolution.
   d. **Associated Cost**: Provide the cost of the product or service.
   e. **SKU Number**: Provide the Stock Keeping Unit number of the Supplier Catalog Item.
7. When ready, the Owner begins planning the Agreement:
   a. In the Default Form, click **Begin Planning**.

   The Agreement status changes to Planning.

8. When the available information has been entered, the Owner activates the Agreement:
   a. In the Default Form, click **Activate** to activate the Agreement.
      The Agreement status changes to Active.

      Note: The Owner can keep track of progress, troubleshooting, or other notes using the **Journals** tab. The Journal tracks Owner notes/comments, as well as activity and changes made to the Agreement.

9. When the Agreement has been fulfilled, the Owner can Retire the Agreement:
   a. In the Default Form, click **Retire** to retire the Agreement.

   The Agreement status changes to Retired.

10. The Agreement can be reverted to Active status or reverted to Inactive status after being retired.

    a. Revert to Active: Click the link to revert the Agreement to Active.

    b. Revert to Inactive: Click the link to revert the Agreement to Inactive.

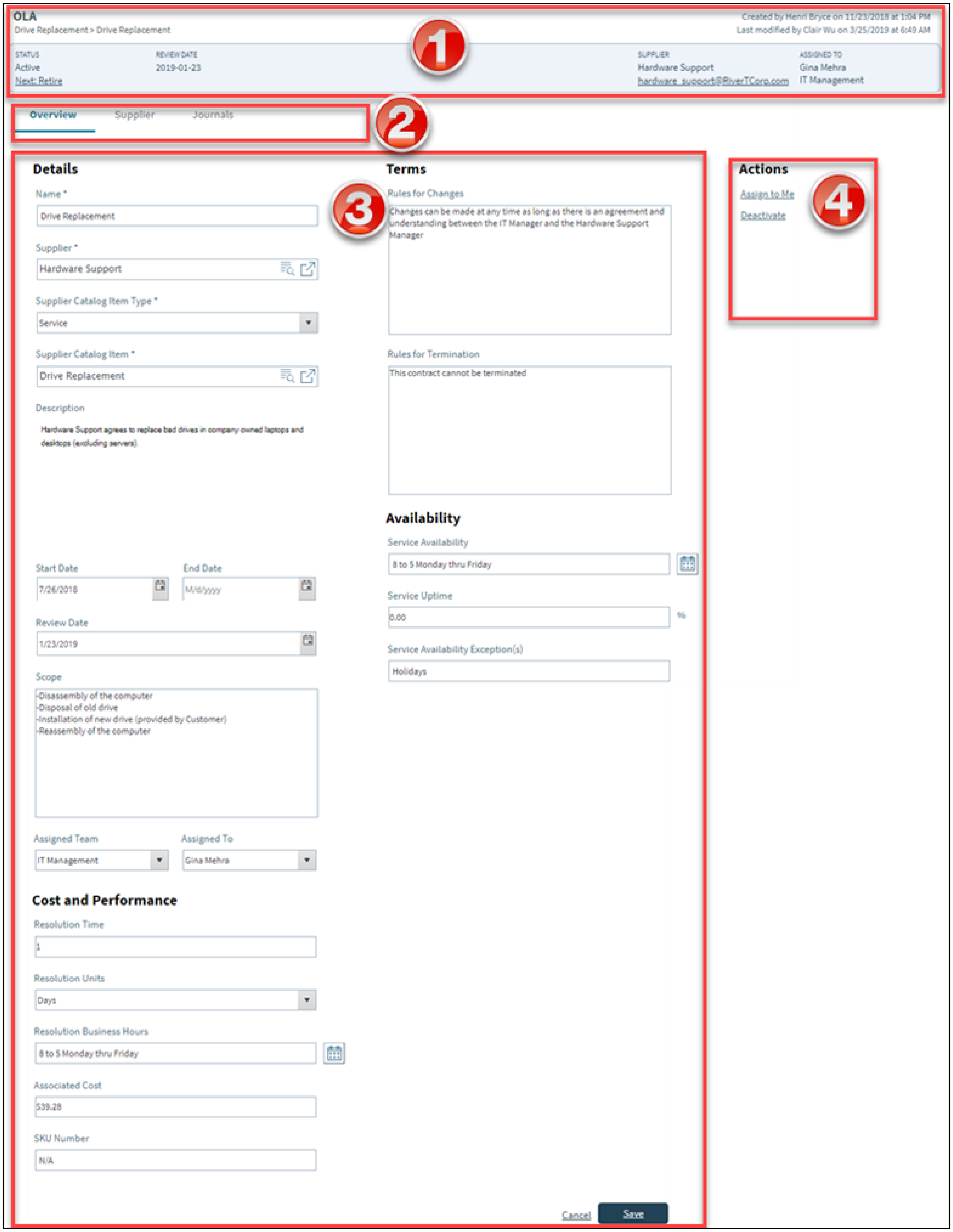
Agreement Features

CSM provides the following tools to help manage Agreements:

Agreement Forms

Use the Agreement Forms to create, edit, and track Agreements. The forms are made up of four main areas:

1. Default Form: Displays the name of the Agreement, Agreement type (OLA or Underpinning Contract), and other important information.
2. Form Arrangement: Dynamically displays linked records (Child Records) that are in a relationship with the parent Agreement.
3. Form Area: Displays the form fields for the tab selected in the Form Arrangement. The Overview form contains most of the Agreement information.
4. Actions List:
    - Assign to Me
    - Deactivate


OLA
Drive Replacement > Drive Replacement
Created by Henri Bryce on 11/23/2018 at 1:04 PM
Last modified by Clair Wu on 3/25/2019 at 6:49 AM
STATUS
Active
Next: Retire
REVIEW DATE
2019-01-23
SUPPLIER
Hardware Support
hardware_support@RiverTCorp.com
ASSIGNED TO
Gina Mehra
IT Management
1
Overview
Supplier
Journals
2
Details
Name *
Drive Replacement
Supplier *
Hardware Support
Supplier Catalog Item Type *
Service
Supplier Catalog Item *
Drive Replacement
Description
Hardware Support agrees to replace bad drives in company owned laptops and desktops (excluding servers).
Start Date
7/26/2018
End Date
M/d/yyyy
Review Date
1/23/2019
Scope
-Disassembly of the computer
-Disposal of old drive
-Installation of new drive (provided by Customer)
-Reassembly of the computer
Assigned Team
IT Management
Assigned To
Gina Mehra
Cost and Performance
Resolution Time
1
Resolution Units
Days
Resolution Business Hours
8 to 5 Monday thru Friday
Associated Cost
$39.28
SKU Number
N/A
3
Terms
Rules for Changes
Changes can be made at any time as long as there is an agreement and understanding between the IT Manager and the Hardware Support Manager
Rules for Termination
This contract cannot be terminated
Availability
Service Availability
8 to 5 Monday thru Friday
Service Uptime
0.00
%
Service Availability Exception(s)
Holidays
Cancel
Save
Actions
Assign to Me
Deactivate
4

The following table describes common fields on the Agreement Form:

Field	Description	Comments
Default Form	Displays the name of the Agreement, Agreement type (OLA or Underpinning Contract), status, review date, and Supplier and assignment information.	
Overview	Contains information about the Agreement, such as the Supplier Catalog Item Type, the Supplier Catalog Item, a description of the Agreement, and the Scope of the Agreement.	Fields in the Main pane are the same, regardless of the type of Agreement. These fields are completely customizable and configurable.
*Name	Name of the Agreement.	*Required
*Supplier	Supplier assigned to the Agreement.	*Required A Supplier is a person or group (internal or external) that is responsible for providing a product or service to an organization based on an Operational Level Agreement (OLA) or Underpinning Contract (UC).
*Supplier Catalog Item Type	Designates if the Supplier is providing a product or a service.	*Required
*Supplier Catalog Item	Designates what kind of product or service the Supplier is providing.	*Required Supplier Catalog Items are limited by the Supplier Catalog Type.
Description	Description of the Agreement.	
Scope	A summary of the steps involved in completing the Agreement.	
Rules for Changes	Provide the negotiated and agreed upon rules for changing the Agreement.	
Rules for Termination	Provide the negotiated and agreed upon rules for terminating the Agreement.	
Resolution Time	The negotiated and agreed upon resolution time.	
Resolution Units	The units to be applied to the resolution time.	

Field	Description	Comments
Resolution Business Hours	The business hours that will count against the resolution time.	
Associated Cost	The negotiated and agreed upon cost of the product or service.	
Form Arrangement	Dynamically displays child records that are in a relationship with the Agreement.	
Terms	Displays rules for changing or terminating the Agreement.	
Supplier	Displays detailed information about the Supplier.	
Journals	Displays related Journal records that are created to track User notes/comments, field changes, and e-mail correspondence.	

Agreement Journals

CSM provides the following OOTB Agreement Journal types:

- **Journal - Note:** Tracks User notes/comments.
- **Journal - Customer Request:** Tracks Customer requests/comments.
- **Journal - Mail History:** Tracks e-mail correspondence. For example, e-mails sent for receipt, follow-up, resolution, and questions.
- **Journal - History:** Tracks important Field changes. Tracked Fields are configurable and are defined in the Business Object definition.
- **Journal - Remote Support History:** Tracks chat/remote support sessions.

Note: History Journals are automatically created by CSM. Notes are manually created.

Each Journal Type has its own unique form. Journals are child records, so they are linked to and available from their parent records (access Journals by clicking the Journals tab in the parent record's Arrangement).

Agreement One-Step Actions

CSMprovides the following Agreement One-Step Actions:

One-Step Actions	**Description/Actions**	**Associations**	**Executed From**
Status			
Alt 1 Step from Relationship	Conditionally change the Agreement Status to next logical Status (defined by the Agreement Status values in Table Management) and/or initiate the next appropriate One-Step.	Agreement	Agreement Form: Next: <Status>
Alt 2 Step from Relationship			
Next Step from Relationship			
Ownership			
Take Ownership	Makes the Current User the Primary User of the record.	OLA or UC	Agreement Form: **Assign to Me** Action
Supplier			
E-Mail Supplier	E-Mails Supplier associated with the Agreement.	OLA or UC	Agreement Form: Supplier e-mail address
Dial Supplier Phone	Calls Supplier associated with the Agreement.	OLA or UC	Not included on OOTB Agreement Form
Other			
Update Costs when OLA Costs Change	Updates record to reflect changes made to the Associated Cost field. Updates costs on associated Work Units and Service Catalog Templates.	OLA	Agreement Form: One-Step Action runs automatically when OLA is saved.
Update Costs when UC Costs Change	Updates record to reflect changes made to the Associated Cost field. Updates costs on associated Work Units and Service Catalog Templates.	UC	Agreement Form: One-Step Action runs automatically when UC is saved.
Update Costs when Agreement Costs Change	Updates record to reflect changes made to the Associated Cost field. Updates costs on associated Work Units and Service Catalog Templates.	Agreement	Agreement Form: One-Step Action runs automatically when Agreement is saved.

A full list of One-Step™ Actions is beyond the scope of this document. Export a schema document from CSM Administrator (**Create a Blueprint > Tools > Export Schema**) to view a full list of One-Step Actions associated with a particular type of Business Object.

Agreement Saved Searches

CSM provides the following OOTB Agreement Saved Searches:

Operational Level Agreements

Saved Search	Returns	Association	Executed From
Active OLAs	All active OLAs.	OLA	Search Manager, Widgets
All OLAs	All OLAs, regardless of status.	OLA	Search Manager
OLA Costs	Active OLAs with associated costs.	OLA	Search Manager

Underpinning Contracts

Saved Search	Returns	Association	Executed From
Active Status	All active Underpinning Contracts.	Underpinning Contract	Search Manager, Widgets
This Week	Underpinning Contracts with a review date this week.	Underpinning Contract	Search Manager

Agreement

Saved Search	Returns	Association	Executed From
Resolution Times	Agreements containing a Resolution Time.	Agreements	Search Manager
Supplier Agreements	Agreements with a Supplier.	Agreements	Search Manager

Change Management

Change management ensures that Changes are recorded, classified, scheduled, implemented, and reviewed to minimize service disruption to the company.

Note: This feature is also available as a mApp Solution.

About Change Requests

A Change Request is a record that tracks the addition, removal, or modification of anything that could affect IT Services. These can include changes to architectures, processes, tools, metrics, documentation, and other Configuration Items.

CSM manages three types of Changes:

- A Standard Change is documented, low-risk, low-cost, occurs frequently, and is thoroughly understood by the Change Advisory Board (CAB). The change only needs to be approved by the CAB once before it is added to a list of Standard Changes. After that, Standard Changes do not need to go through the approval process.
- A Normal Change is undocumented and it is unknown how the Change might affect the system. Though the CAB must approve the Change before implementation, it is not considered a high priority, and can be addressed during the regular CAB meeting time.
- An Emergency Change is a break in the system and must be addressed immediately so that the system can resume operation. Since the change is critical, it requires immediate attention from either the CAB or Emergency Change Advisory Board (ECAB).

For example:

- A new employee requires a software installation (Normal Change). If this becomes a common scenario, a Change Request can be submitted to make it a pre-authorized Change (Standard Change).
- A technician reboots the email server because several employees are unable to access email (Emergency Change).

Related concepts

Create a Change Request

Change Good to Know

CSM uses several features to manage the Change workflow. The Change Form helps create, manage, and track Changes; One-Step™ Actions help move the Change through its workflow; Automation Processes notify stakeholders via email; an Approval process enforces Approvals; and a Change Dashboard notifies stakeholders and tracks metrics.

- Search for one or more Changes that meet a specific criteria by running a Quick Search or Search Group.
- Create a new Change by selecting **New > New Change Request**.
- If enabled (via an Automation Process), email notifications are automatically created and sent to stakeholders. For example, send emails to:
  - A customer to notify them of a status change.
  - Team owners to notify them of ownership.
  - The user owner to notify them of the ownership.
  - Approvers when a Change requires approval.
- When on a record, you can send an email directly to the current customer (requester) by selecting **File > E-mail Current Customer** in the CSM Desktop Client or by selecting **E-mail > E-mail Current Customer** in the CSM Browser Client. You can also select the customer's email address in the Change Form.
- Journals track what occurs during the record's lifecycle (example: Notes to track progress or comments, and History to track important field changes, email correspondence). View or add Journals by selecting the Journal tab in the record's Form Arrangement.
- Fields:
  - Many fields with drop-down lists are driven by a Lookup Table and can be edited in the CSM Desktop Client using Table Management. To see what table is providing the data, select inside the field, and then press **F3**.
  - Required fields are often conditional, meaning some are required to save a record, some are required to change the status of a record, and some are required to close the record. Required fields are marked with an asterisk by the field label.
  - The Description field is a Rich Text field, so formatting and images/screenshots can be used to complement the text. To format the text or embed an image, select the **Zoom** button.
  - Some validated fields can recognize what you are typing and will suggest a value (example: If you type "P" into the field, CSM will suggest the first item it finds that starts with the letter P). Use the down arrow button to scroll through other possible values.
  - Press **TAB** to move to the next field on the form.

    Note: A full list of fields is beyond the scope of this document. Export a schema document from CSM Administrator (**Create a Blueprint > Tools > Export Schema**) to view a full list of fields associated with a particular type of Business Object (example: Major).
- Saving:

- Date, time, and user name information is recorded the first time the form is saved, and each time the form is modified.
- Selecting **Save** triggers an audit of fields that are being tracked for modification (example: Status). If a modification is detected in a tracked field, a Journal-History record is created to track the modification. View the modifications in the Journals tab (Form Arrangement).

Related concepts

Change Journals

Lookup Business Objects

About Table Management

About Rich Text

Change Advisory Boards (CABs)

Normal and Emergency Change Requests require at least one approval by a Change Advisory Board.

Change Management uses two boards:

- Change Advisory Board: The Change Advisory Board (CAB) is a group of people that support the assessment, prioritization, authorization and scheduling of Changes.
- Emergency Change Advisory Board: The Emergency Change Advisory Board (ECAB) is a subgroup of the Change Advisory Board that makes decisions about Emergency Changes.

By default, Standard Changes do not require the approval of the CAB, but you can define an Approval Process in CSM Administrator (**Create a Blueprint > [Business Object] > Edit Approvals**), if necessary.

Tip: Use the Change Advisory Board Worksheet to organize information relating to CAB and ECAB members. You will need this information when defining the approval boards.

Create a Change Advisory Board

Procedures are configured in the CSM Desktop Client and in CSM Administrator.

To configure the CAB:

1. Complete the Change Advisory Board worksheet: Organize information relating to CAB members.
2. Define Change Advisory Board Members: Select CAB members and assign basic Approval rights.

Note: CSM provides three Approvals for Change, including Emergency Change Implementation Requests, Normal Change Assessment Approval, and Normal Change Implementation Approval. Add, edit, or delete Approvals for Change in CSM Administrator.

Related concepts

Change Management mApp Solution Change Advisory Board Worksheet
About Approvals
Define Change Advisory Board Members
Security Features Security Rights
Create a Change Request

Change Management mApp Solution Change Advisory Board Worksheet

Use the Change Advisory Board worksheet to organize information relating to CAB members.

A subset of the CAB are members of the Emergency Change Advisory Board (ECAB), who approve Emergency Change Requests.

Table 1. Change Advisory Board

Table	Selections	Comments
CAB Member Name:		Member names come from a UserInfo table that is set up when identifying CSM users.
Change Type	• Emergency • Normal • Standard	Defined using the Change Type Lookup Table in Table Management.
Role	• Business Analyst • Change Manager • Developer • End-User • Financial Analyst • Project Manager • Project Team Member • Sponsor • Stakeholder • Technical Analyst • Tester	Defined using the CAB Role Lookup Table in Table Management.
Approval Phase	• Assessment Phase • Implementation Phase	By default, Standard Changes do not require an Approval.

Related concepts

Create a Change Advisory Board

Table Management

Change Management Workflows

CSM offers three workflows based on Change types.

Change Types

- Standard - Does not require review.
- Normal - Requires review but is not urgent.
- Emergency - Requires review and is urgent.

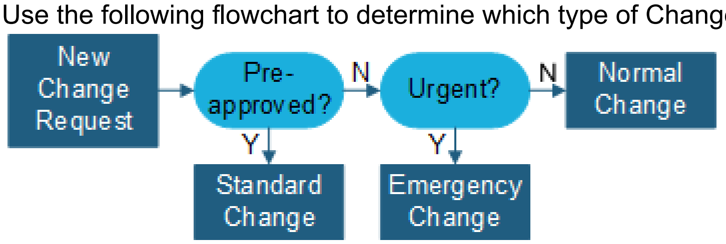
Contributors

A Change typically has several contributors. Depending on your workflow and the size of your company, many of these contributors may have any of the following combined roles:

- **Creator:** User who first logs the Change. This is typically a technician.
- **Requestor:** User who requests the Change. This is typically an IT manager.
- **Owner:** User who manages the Change. This is typically a change manager.
- **Approver:** User who ensures that the Change should be implemented. This is typically one or more members of the CAB Team.

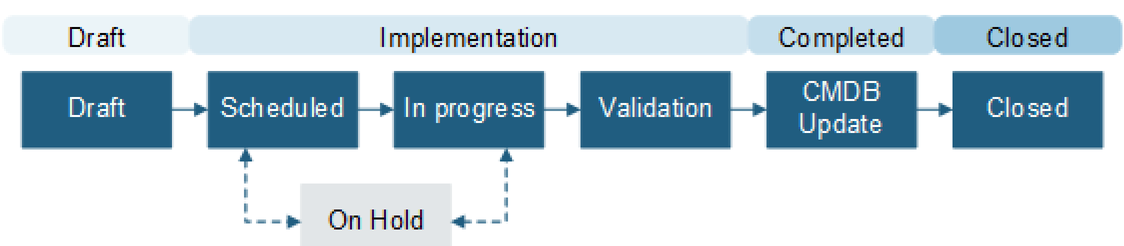
Which Workflow Should I Use?

Use the following flowchart to determine which type of Change workflow to follow.



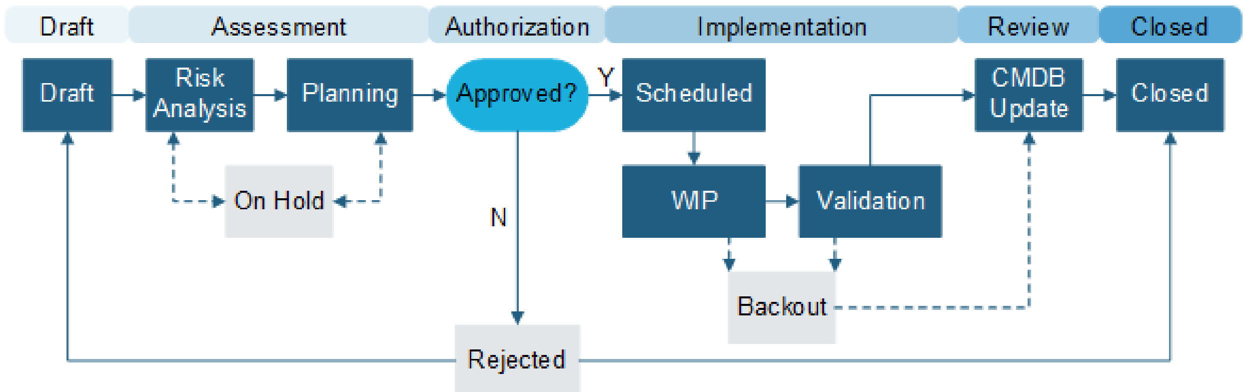
Standard Change Workflow

This is a high-level workflow for Standard Changes.



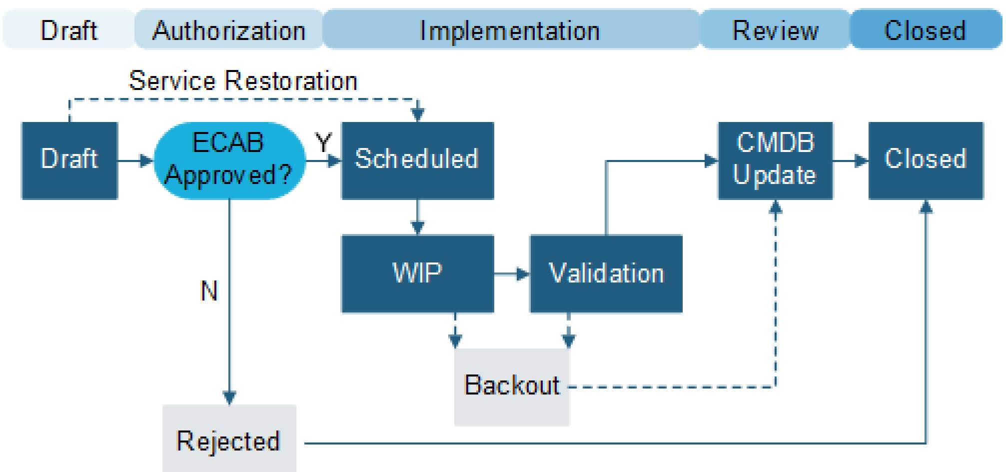
Normal Change Workflow

This is a high-level workflow for Normal Changes.



Emergency Change Workflow

This is a high-level workflow for Emergency Changes.



Related tasks

Create a Standard Change Request
Create a Normal Change Request
Create an Emergency Change Request

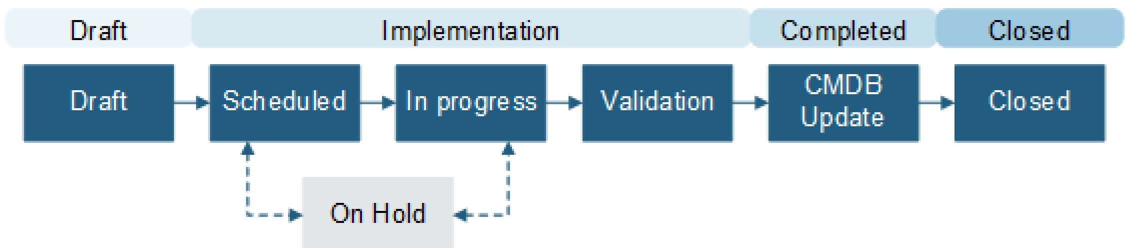
Create a Change Request

Normal Changes and Emergency Changes require steps to create a plan and gain approval from a Change Advisory Board (CAB). Standard Changes consist of pre-approved procedures and Tasks.

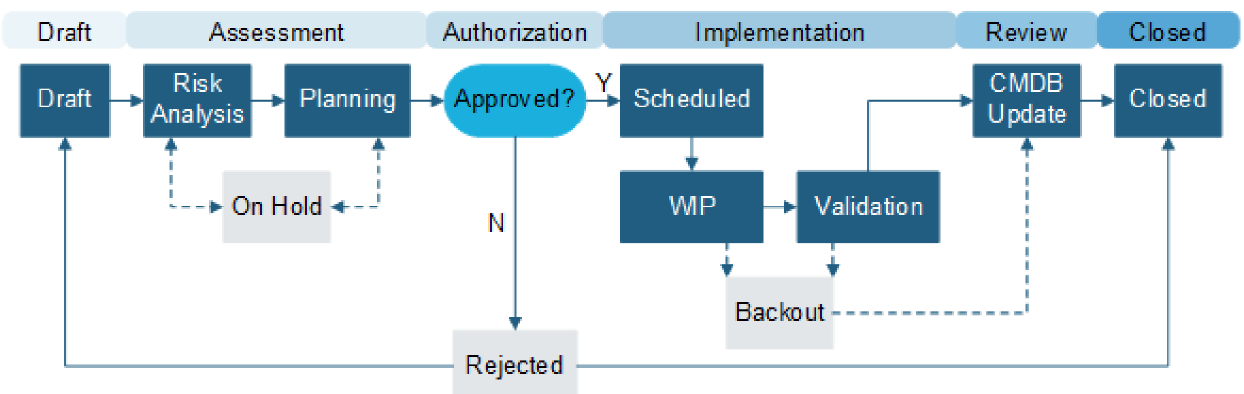
Normal, Emergency, and Standard Change Requests each have slightly different forms, but share many fields. This topic provides an overview of the Change Request Form. Refer to Create a Standard Change Request, Create a Normal Change Request, and Create an Emergency Change Request for details on the workflow for each Change Type.

The diagrams below show high-level workflows for each Change Type.

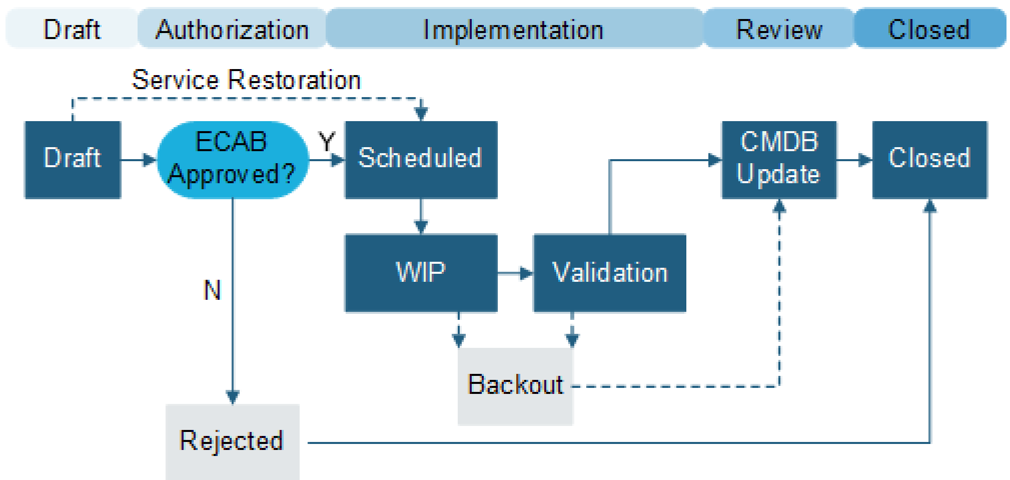
High-Level Standard Change Workflow



High-Level Normal Change Workflow



High-Level Emergency Change Workflow



Create and Classify the Change

On the CSM toolbar, select **New > New Change Request**.

A new Change record is created with a unique Change ID.

Field	Description
Requester	In the Requester Field, specify the name of the person who initiated the Change, and then press **Enter** or **Tab** to search for the Customer Record. If an exact match is found, the Requested By Fields in the Default Form are auto-populated with the customer's name and email. If multiple matches are found, the Contact Manager opens so you can select the appropriate customer. To browse customers, select the Related Item Picker.
Title	Specify a title for the Change.
Description	Specify a description of the Change.
Change Type	Select **Normal**, **Standard**, or **Emergency**. The fields that are show on the rest of the form depend on this selection.
Change Model	Select the **Related Item Picker** to choose a Change Model (required for Standard Changes, optional for Normal and Emergency Changes). The Change Model will pre-populate several fields, depending upon how the Change Model was set up.
Emergency Subtype	Select a subtype (Service Restoration or Outage Avoidance) from the drop-down list (Emergency Change only).
Primary Configuration Item	Select the **Related Item Picker** to launch the CMDB window, and then select a CI. This shows CIs for any customer or for a selected customer.
Assigned Team	Specify the Team Owner of the Change.
Reason	Use the drop-down list to select a reason for the Change.
Change Already Implemented?	Indicates whether the Emergency Change has already been implemented (Emergency Change - Service Restoration only).

Field	Description
Assigned To	Specify the member of the Team who will be the User Owner of the change. The Creator can take ownership of the Change by selecting **Assign to Me** in the **Actions** list.
Proposed Start Date	Select the **Calendar Date Selector** to select a start date for the Change (Standard and Normal Change only).
Proposed End Date	Select the **Calendar Date Selector** to select an end date for the Change (Standard and Normal Change only). **Note:** If a Stop icon appears next to the Proposed Start and/or Proposed End Date, you are outside of the maintenance window, and you must select an acceptable date. Hover over the icon for a detailed error message.
Impact	Select the scope of the Change from the drop-down list.
Urgency	Select the service level from the drop-down list.
Priority	The Impact and Urgency scores are used to calculate the Priority.
Service Affected	Select the **Related Item Picker** to select the affected Service.
View Change Calendar	Select the **View Change Calendar** link to open the Change Calendar.
View Collision Detection	Select the **View Collision Detection** link to open a Configuration Map of the Primary CI.
Review Date	Select the **Calendar Date Selector** to select a review date the Change (Normal Change only).

Risk and Planning

The procedures in this section are for Normal Changes and Emergency Changes but do not apply to Standard Changes. These types of Changes require approval from a Change Advisory Board (CAB).

Field	Description
Implementation Plan	Specify the process required to implement the Change.
Justification	Enter a justification for the Change Request.
Acceptance Criteria	Specify the functionality and quality requirements.
Validation Plan	Provide a validation plan (Normal Change only).
Back Out Plan	Specify a plan to back the Change out if implementation fails.
Outage Required	Select this check box if the CI will experience an outage while the Change is implemented (Normal Change only).
Impact Assessment	Provide an impact assessment.
Outage Start Date	Select the **Calendar Date Selector** to select a start date for the outage (Normal Change only).

Field	Description
Outage End Date	Select the **Calendar Date Selector** to select a start date for the outage (Normal Change only). **Note:** If a Stop icon appears next to the Outage Start and/or Outage End Date, you are outside of the maintenance window, and you must select an acceptable date. Hover over the icon for a detailed error message.
Complete Risk Assessment	In the **Actions** list, select this link to open the Risk Assessment questionnaire.

Validation and Review

Emergency Changes are time sensitive and do not require all of the review procedures listed in this section. Steps that are used only for Normal Changes are marked **(Normal Change only)**.

1. Owner assesses the Change:

Field	Description
Impact Assessment	Specify the impact assessment (consequences of the Change).
Back Out Plan	Specify a back out plan or attach information that details what actions to perform if the Change implementation does not work.

2. A peer review task must be assigned and completed.
3. **(Normal Change only)** Owner submits the Change for authorization:
   a. Under **Status**, select the **Next: Submit for Approval** link.
   b. If a peer review task is incomplete, the Change cannot be submitted for approval.
4. **(Normal Change only)** Approver approves the Change:
   a. In the Approval grid, double-click an Approval Record.
      The Approval form opens. The Approver Name and Details fields are auto-populated per the defined Approval process rules.
   b. (Optional) Provide comments.
   c. Select **Approve**.
      The Approval Status icons indicate the number of pending Approvals and their status (Pending, Approved, Denied, or Abstained).

      The Change status changes to Pre-Implement and the Change enters the Implement phase.
5. **(Normal Change only)** If the Change is approved, it moves to the Scheduled status.
   a. Under **Status**, select the **Next: Scheduled** link.
6. When you are ready to implement the Change, select the **Next: Begin Work** link.
7. After deployment of the Change, the owner completes the **Validation and Review** section.

Field	Description
Actual Start Date	Select the **Calendar Date Selector** to select the date that the Change actually started. When a Change Request moves to the In Progress status, this field is auto-populated with the current date/time.
Actual End Date	Select the **Calendar Date Selector** to select the date that the Change actually ended. **Note:** If a Stop icon appears next to the Actual Start and/or Actual End Date, you are outside of the maintenance window, and you must select an acceptable date. Hover over the icon for a detailed error message.
Close Code	Select a close code from the drop-down list.
Close Notes	Specify additional information related to implementation of the Change.
PIR	Select the Post Implementation Review status.
CMDB Update Complete	Select this check box when the CMDB update is finished.
Email Change Review	Select this link to email the user assigned to this Change.

Complete the Change

Close the change.

Note: All fields in this section must be filled out before you can move a Change Request to Closed status. There is an exception if the Close Code is **Cancelled**, **Declined by CAB**, or **Withdrawn**.

Related concepts

About Change Requests

Change Workflow

Change Features

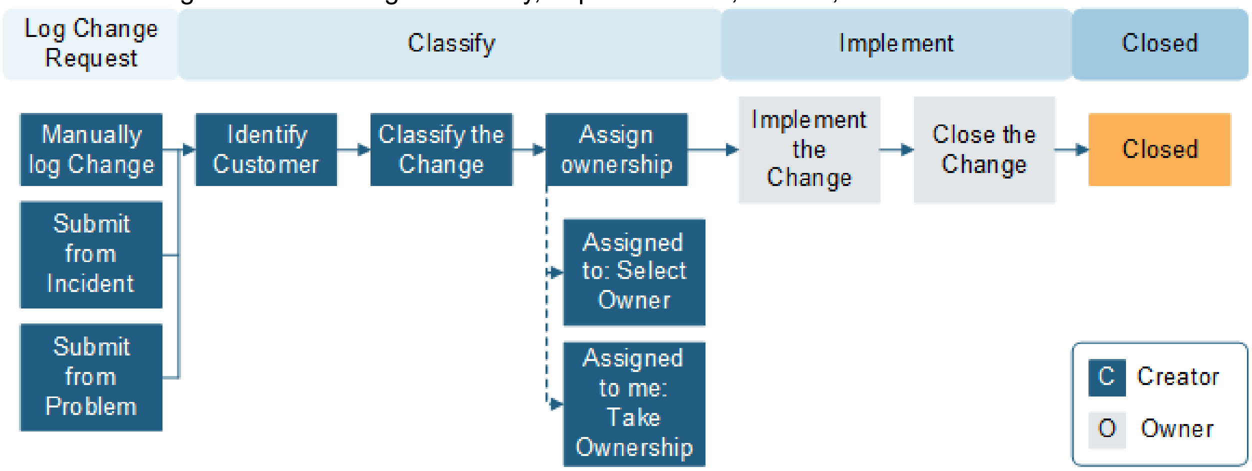
Create a Change Advisory Board

Change Models

Create a Standard Change Request

Standard Change Requests do not require approval.

Standard Changes have four stages: Classify, Implementation, Review, and Closed.



To create a Standard Change:

1. Create a Change Request and select **Standard** from the **Change Type** drop-down list.
2. All fields in the **Classification** section are required fields (with the exception of Primary Configuration Item).
   When you enter the Change Model; the Title, Description, Service Affected, and Service Importance fields automatically populate.
3. Add any Tasks associated with the Change Request.
4. Under **Status**, select the **Scheduled** link.
5. When you are ready to begin implementation tasks, select the **Next: Begin Work** link (under **Status**).
   The Stage moves to In Progress. You can also place the Change Request on hold by selecting the **On Hold** link under **Actions**.
6. Under the **Validation and Review** section, all fields are required. Complete all associated Tasks.
   All fields in this section must be filled out before you can move a Change Request to Closed status. The exception is if the Close Code is **Cancelled**, **Declined by CAB**, or **Withdrawn**.
7. After the Change is deployed, select the **Next: Validation** link (under **Status**).
8. All implementation tasks must be closed before advancing to the next status.
9. Under **Status**, select the **Next: CMDB Update** link.
   After the Change Owner updates the CMDB, select the **CMDB Update Complete** check box.
10. Under **Status**, select the **Next: Mark as Complete** link.
    The status changes to Closed.

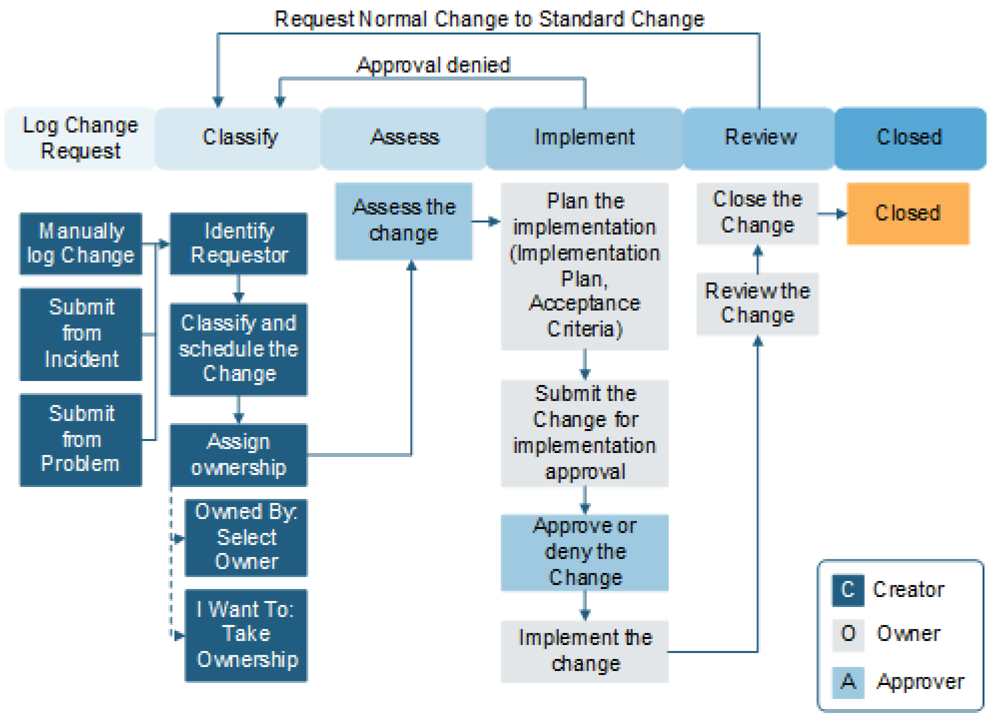
Related concepts

Change Management Workflows

Create a Normal Change Request

Normal Change Requests require approval.

Normal Changes have six stages: Classify, Assessment, Authorization, Implementation, Review, and Closed.



To create a Normal Change Request:

1. Create a Change Request and select **Normal** from the **Change Type** drop-down list.
2. All fields in the **Classification** section are required fields.
3. Under **Status**, select the **Next: Risk Analysis** link.
4. Select the **Risk Assessment** link to fill out the Risk Assessment survey (required).
   You cannot edit a Risk Assessment after you submit it.
5. Under **Status**, select the **Next: Planning** link.
   A prompt appears notifying you that a Peer Review work item has been created and needs to be assigned. Select **Close** to close the window.
6. Select the **Tasks** tab to complete the Peer Review.
7. During the Planning stage, complete the implementation plan, provide evidence of testing, add tasks if necessary, and prepare the Change Request for approval. Under the **Risk and Planning** section, all fields are required before you can submit for approval.
8. Create any Tasks necessary for the Change Request.
9. Under **Status**, select the **Next: Approval** link to submit the Change Request for authorization. CSM calculates lead times and an approval deadline. If the proposed start date does not meet the lead time requirement, you will have to either reschedule the change or submit it as an exception.

If the CAB approves the Change Request, the status moves to Scheduled. If it is denied, the status moves to Rejected.

> **Note:** After submitting for approval, all fields in the **Classification** and **Risk and Planning** sections are disabled and read-only, with the exception of the Assigned Team/Assigned To and Proposed Start and End Dates. After approval, the Proposed Start and End Dates are disabled and read-only.

10. When you are ready to begin implementation tasks, select the **Next: Begin Work** link (under **Status**).
    The Stage moves to In Progress. You can also place the Change Request on hold by selecting the **On Hold** link under **Actions**.
11. Under the **Validation and Review** section, all fields are required. Complete all tasks.
    All fields in this section must be filled out before you can move a Change Request to Closed status. The exception is if the Close Code is **Cancelled**, **Declined by CAB**, or **Withdrawn**.
12. After the Change is deployed, select the **Select Next: Validate Change** link (under **Status**).
13. All implementation tasks must be closed before advancing to the next status.
14. Under **Status**, select the **Next: CMDB Update** link.
    After the Change Owner updates the CMDB, select the **CMDB Update Complete** check box.
15. Under **Status**, select the **Next: Mark as Complete** link.
    The status changes to Closed.

Related concepts

Change Management Workflows

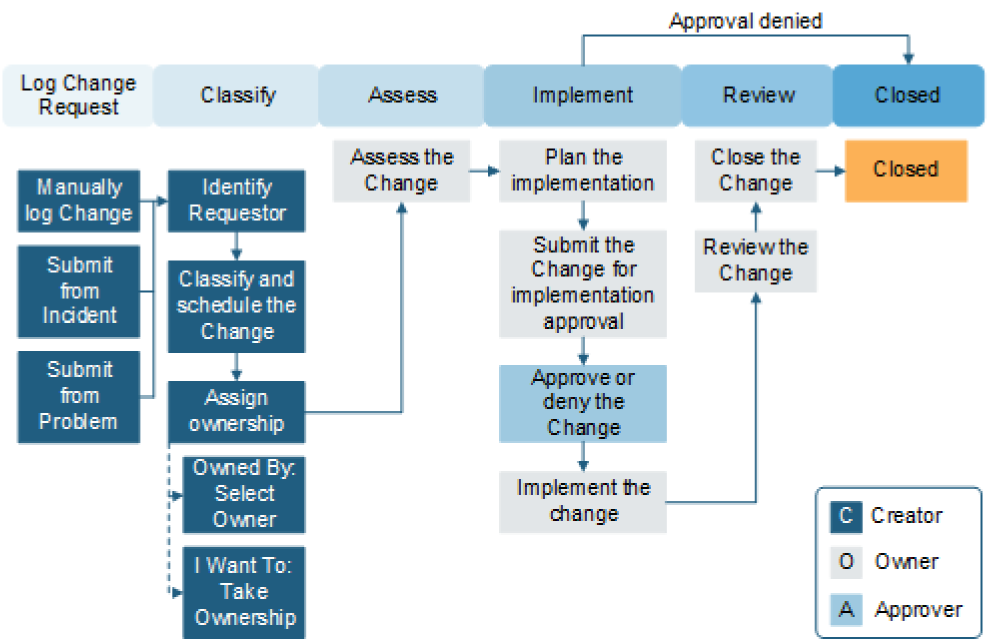
Create an Emergency Change Request

Emergency Change Requests are urgent requests that require approval.

Emergency Changes can be classified into subtypes to identify emergency change drivers and adjust business rules for submission.

- Service Restoration: A Change necessary to resolve a service outage or a severe degradation of service delivery. Approval of actions to restore service is managed by the team working the incident; approvals are not executed in CSM.
- Outage Avoidance: The Change must be executed outside the normal Change process to prevent a service interruption. Approvals must be completed prior to implementation.

Emergency Changes have five Stages: Classify, Authorization, Implementation, Review, and Closed.



To create an Emergency Change Request:

1. Create a Change Request and select **Emergency** from the **Change Type** drop-down list.
2. All fields in the **Classification** section are required fields (with the exception of Change Model and Primary Configuration Item).
   When you enter the Change Model; the Title, Description, Assigned Team, and Service Affected fields automatically populate.
3. Add any Tasks associated with the Change Request.
4. Under the **Risk and Planning** section, all fields are required.
5. For **Emergency Subtype**, select **Outage Avoidance** or **Service Restoration**.
6. If you choose **Outage Avoidance**:

   a. When an Outage Avoidance is submitted for ECAB approval, formal review and authorization occurs. Approval Task(s) must be approved. If the Outage Avoidance is rejected, the Change Request is closed.
      If it is approved, the Change Request moves to Scheduled status.
   b. Select the **Next: ECAB Approval** link (under **Status**).
7. If you choose **Service Restoration**, all fields in the **Classification** and **Risk and Planning** sections are required prior to moving to the next status because ECAB approval is bypassed.
8. Select the **Next: Scheduled** link (under **Status**).
9. When you are ready to begin implementation tasks, select the **Next: Begin Work** link (under **Status**).
   The Stage moves to In Progress.
10. After the Change is deployed, perform validation testing. Under the **Validation and Review** section, all fields are required.
    All fields in this section must be filled out before you can move a Change Request to Closed status. The exception is if the Close Code is **Cancelled**, **Declined by CAB**, or **Withdrawn**.
11. Under **Status**, select the **Next: CMDB Update** link.
    After the Change Owner updates the CMDB, select the **CMDB Update Complete** check box. If no CMDB Update is required, you can move to the next step.
12. Under **Status**, select the **Next: Mark as Complete** link.
    The status changes to Closed.

Related concepts

Change Management Workflows

Change Features

CSM includes several tools to help manage Change.

Related concepts

Create a Change Request

Change Management Risk Assessment

Use Risk Assessments to assess the risk of Normal and Emergency Change Requests.

Risk Assessments are mandatory for Normal Changes and optional for Emergency Changes. The Risk Assessment includes ten standard questions, but you can edit them as needed.

- How many users will be impacted by this Change?
- Has this Change been implemented before?
- Is there an impact to revenue if the Change fails?
- How easy would it be to roll back this Change if it failed?
- If there is a failure with the Change, can services be restored within the proposed start and end date?
- Is the Change fully documented?
- How many resources are required for this Change?
- Is the Change visible to external customers?
- Has the Change been tested?
- Could a business service disruption occur if the Change implementation does not go as planned?

A risk score of Low, Moderate, High, or Critical is calculated based on the answers.

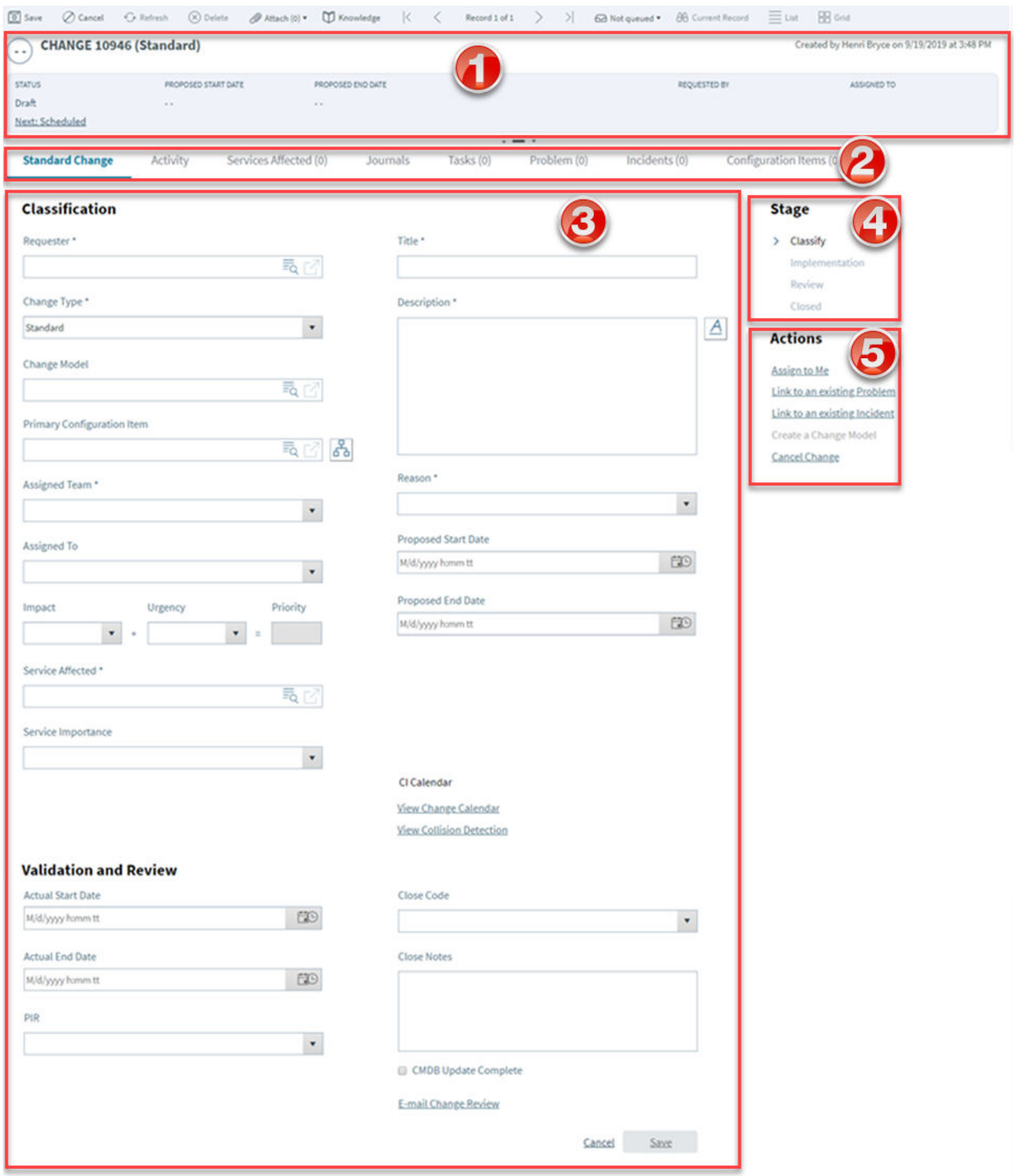
Change Management Change Form

Use the Change Form to create, edit, and track Changes.

The form has five areas:

1. Status Area: Displays information relevant to the Change Form, including Change ID, Change type (Standard, Normal, or Emergency), Status, and Requester.
2. Pages: Displays linked records (child records) that are related to the Change (parent record), such as Journals (to track notes and history), Problems, and Incidents.
3. Form Area: Displays the main form fields.
4. Stages: A list of the stages associated with the Change Request. Different Change Types have different stages.
5. Actions List: Dynamically displays a list of actions that are available for the current Change.

The following image shows a Standard Change Form with the five sections identified.


Save
Cancel
Refresh
Delete
Attach (0)
Knowledge
Record 1 of 1
Not queued
Current Record
List
Grid
CHANGE 10946 (Standard)
Created by Henri Bryce on 9/19/2019 at 3:48 PM
STATUS
PROPOSED START DATE
PROPOSED END DATE
REQUESTED BY
ASSIGNED TO
Draft
Next: Scheduled
1
Standard Change
Activity
Services Affected (0)
Journals
Tasks (0)
Problem (0)
Incidents (0)
Configuration Items (0
2
Classification
3
Requester *
Title *
Change Type *
Standard
Description *
Change Model
Primary Configuration Item
Assigned Team *
Reason *
Assigned To
Proposed Start Date
M/d/yyyy h:mm tt
Impact
Urgency
Priority
Proposed End Date
Service Affected *
Service Importance
CI Calendar
View Change Calendar
View Collision Detection
Validation and Review
Actual Start Date
Close Code
Actual End Date
Close Notes
PIR
CMDB Update Complete
E-mail Change Review
Cancel
Save
Stage
4
Classify
Implementation
Review
Closed
Actions
5
Assign to Me
Link to an existing Problem
Link to an existing Incident
Create a Change Model
Cancel Change

Change Journals

CSM provides several Change Journal types.

- **Journal - Note:** Tracks user notes/comments. For example, a user might chronicle troubleshooting progress.
- **Journal - Customer Request:** Tracks customer requests/comments.
- **Journal - History:** Tracks important field changes. Tracked fields are configurable and are defined in the Business Object definition.
- **Journal - Mail History:** Tracks email correspondence. For example, emails sent for receipt, follow-up, resolution, and questions.
- **Journal - Queue History:** Tracks when records are added to/removed from a Queue.

Note: History Journals are automatically created by CSM. Note and Customer Request Journals are manually created.

Each Journal Type has its own unique form. Journals are child records, so they are linked to and available from their parent records (access Journals by selecting the Journals tab in the parent record's Form Arrangement).

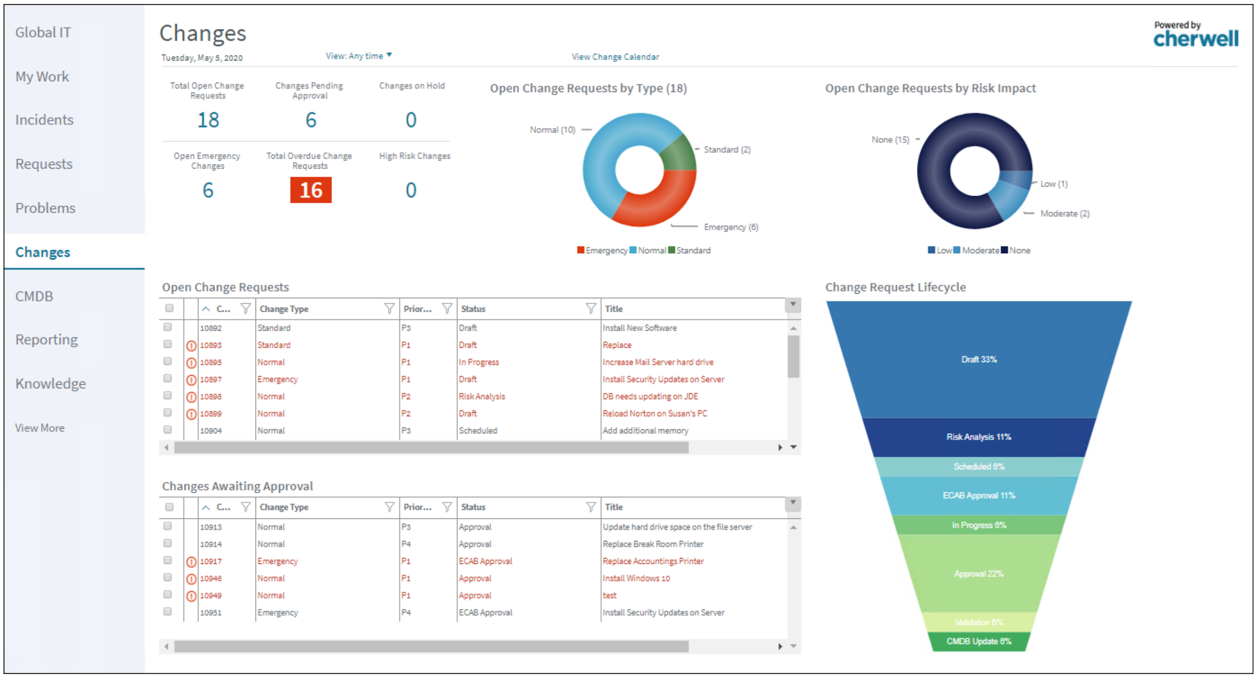
Related concepts

Change Good to Know

About Queues

Change Dashboard

CSM provides a Change Dashboard that intuitively organizes your critical metrics into a single, real-time, at-a-glance Change control panel.



Note: Change metrics are also found on other Dashboards (example: Global IT).

The following table describes the items on the Dashboard.

Item	Description	Widget Type	Widget Name	Widget Uses
Open Change Requests	All open Changes.	Search Results List	CDAll Open Changes	All Open Changes Saved Search
My Change Reviews	Number of approved Changes owned by the current user.	Search Results List	CDAll Approved Changes	My Approved Changes Saved Search
Approved Changes	All approved Changes.	Text Gauge	CDTotal Approved Changes	Approved Changes Saved Search
Linked Incidents or Problems	Open Changes that have either at least one linked Incident or one linked Problem.	Text Gauge	Changes with Linked Incidents or Problems	Active Changes with Linked Incidents and Problems Saved Search

Item	Description	Widget Type	Widget Name	Widget Uses
Open Past Scheduled Close Date	Open Changes (Status does not = Closed) that are open past the time they are scheduled to be closed (Created Date Time is greater than Scheduled End Date).	Text Gauge	CDOpen Changes Past Request Date	All Open Past Scheduled Close Date Saved Search
Changes Outside Window	Open Changes (Status does not = Closed) that occur outside of the maintenance window (Not During Maintenance Window = True).	Text Gauge	CDOpen Change Outside of Maintenance Window	Open Changes Not During Maintenance Window Saved Search
High Risk Changes	Incomplete Changes (Status does not = Complete) with a risk value that is greater than/equal to 3.	Text Gauge	CDHigh Risk Changes	High Risk Changes Saved Search
Change Request Life Cycle	Number of open Changes based on status.	Pipeline Chart	CDChange Request Lifecycle	All Open Changes Saved Search
Open Change Requests by Type	Percentage of open Changes based on type.	Doughnut Chart	CDChanges by Type	Change Requests Saved Search

Change One-Step Actions

CSM provides multiple One-Step Actions associated with Change Requests.

One-Step™ Actions	Description/Actions	Executed From
Status		
Alt Step from Relationship	Conditionally changes the Change status to next logical status (defined by the Change status values in Table Management) and/or initiate the next appropriate One-Step Action.	Change Form: <Status> link
Alt 2 Step from Relationship		
Next Step from Relationship		
Button Next Step	Conditionally changes the embedded form to the next logical form (based on Embedded Form) and/or initiates the next appropriate One-Step Action.	Change Form: Form buttons
Form		
Ownership		
Assign to Anyone	Prompts the user to assign the record to any CSM user (not limited by Team). Uses Owned By ID and Owned By Team fields.	Change Form: Assign To link
Assign Change to Owner	Launches the Choose Team window, where a user can choose an Owned By Team for the record; then, launches the Choose User window, where a user can choose a Primary User from the already-selected Team.	Change Form: Select Owner link
Assign Change to Team	Launches the Choose Team window, where a user can choose an Owned By Team for the record.	Change Form: Select Team link
Take Ownership of Change	Makes the Current User the Primary User of the record.	Change Form: Take Ownership link
Other		
Create Change Review	Creates a new Review Questionnaire (Supporting Object) and creates an email containing a link to the review and record details (Description, Scheduled End Date, Actual End Date).	Change Form: E-Mail Change Review link Change Request Actions toolbar item; Create Change Review option

One-Step™ Actions	Description/Actions	Executed From
Create New Task	Creates a new Task in the Change's Form Arrangement.	Change Form: Create New Task link
Nominate for Standard Change	Creates a new Normal Change Record.	Change Form: Nominate for Standard Change link
Rework Change Request	Changes the Change status to New so users can edit fields and then resubmit the Change for CAB Approval.	Change Form: Rework Change link

A full list of One-Step™ Actions is beyond the scope of this document. Export a schema document from CSM Administrator (**Create a Blueprint > Tools > Export Schema**) to view a full list of One-Step Actions associated with a particular type of Business Object.

Related concepts

Change Workflow

Change Form

Action Block Email Templates

Change Saved Searches

CSM provides numerous Change Saved Searches associated with Change Requests.

Notable Change Saved Searches include:

Saved Search	Returns	Executed From
Active Changes with Linked Incidents or Problems	Open Changes that have either at least one linked Incident or one linked Problem.	Search Manager, Widgets
All Changes Waiting Approval	Changes that have a status of Waiting Approval.	Metrics
Change Requests	All Change Requests, regardless of status.	Search Manager, Widgets
Emergency Change	Changes that are defined as Emergency Changes.	Search Manager, Widgets, Change Calendar
My Approved Changes	Changes approved by me (current user).	Search Manager, Widgets
My Open Change Requests	Open Changes owned by me (current user).	Search Manager, Widgets
My Teams Open Change Requests	Open Changes owned by one of my (current user) Teams.	Search Manager, Widgets
My Total Changes	Changes owned by me (current user).	Search Manager, Widgets
Normal Change	Changes that are defined as Normal Changes.	Search Manager, Change Calendar
Standard Change	Changes that are defined as Standard Changes.	Search Manager, Change Calendar

Related concepts

About Saved Searches

Change Automation Processes

CSM provides the following Change Automation Processes.

Name	Description
Notify Requester of Status Change	When the Status Field of a Change Request changes, the process initiates the Send Status Change E-mail One-Step™ Action, which sends an email notification of the status change to the requester of a Change Request.
Notify Change Team of Assignment	When the Owned By Team Field of a Change Request changes, the process initiates the Notify Owned By Team via E-mail One-Step Action, which sends a notification email to members of the Team that owns the Change Request.
Notify Change Owner of Assignment	When the Owned By Field of a Change Request is changed, the process initiates the Notify Owned By via E-mail One-Step Action, which sends a notification email to the new owner.
Change Approval Notifications	When an Approval is added to a Change Request, the process initiates the Send E-Mail One-Step Action, which sends a notification email to members of the CAB.
Change - Escalate 4 Hours after End Date	Waits four hours after the Scheduled End Date. If the time limit passes, the process initiates the Escalate Change 4 Hours After End Date One-Step Action, which sends an email to the Change Request owner requesting that they update the record.
Change - Notify Problem Owner	Waits until a Change Request that is linked to a Problem is closed, then initiates the Notify Problem Owner Change is Closed One-Step Action, which sends a notification email to the Problem owner.

Related concepts

Automation Processes

Change Reports

CSM provides several Change Reports associated with Change Requests.

Report	Description	Saved Search
Planned Changes	Lists Normal and Standard Changes within a user-specified date range.	All Open Changes
Post Implementation Review	Lists Changes and their associated Incidents and/or Problems.	Changes with Linked Incidents and Problems
Change Trends	Line chart shows the number of Changes by the associated Service. Also lists Change details.	Changes with Linked CIs
Past Year Change Trends	Line chart shows the number of Changes within the past year by the associated Service. Also lists Change details.	Date Range for Report
Change Breakdown	Line chart shows the number of Changes by the reason for the Change (example: Incident Resolution) within a user-specified date range. Also lists Change details.	Date Range for Report
Past Year Change Breakdown	Bar chart shows the number of Changes by the reason for the Change (example: Incident Resolution) within a user-specified date range. Also lists Change details.	Date Range for Report
CI Change Request Metrics	Bar chart shows the top five CIs based on the highest number of associated Change Requests. Also lists Change details.	Changes with Linked CIs
Proactive Service - Changes	Lists Changes based on Service Categorization within a user-specified date range.	Date Range for Report

Related concepts

About Reporting

Change Models

Use Change Models to pre-populate certain fields in Change Request forms.

A Change Model is a pre-defined template you can apply to Change Requests. When you apply a Change Model to a Change Request, the template information is entered into the Change Request, and those fields are made read-only.

You can create and propose Change Models or retire them.

Note: When OOTB, you can only apply Change Models whose status is Active, and whose type matches the Change Request type (Standard, Normal, or Emergency).

Related concepts

Create a Change Request

Create a Change Model

Create a Change Model for the most common changes you encounter in your organization.

To create a Change Model:

1. Select **New > New Change Model** in the CSM Desktop Client or CSM Browser Client.
2. Provide a name for the Change Model.
3. From the **Change Type** drop-down list, select **Standard**, **Normal**, or **Emergency**. Depending on the Change Type you choose, you can include the following fields:

Field	Normal	Emergency	Standard
Owned By Team	x	x	x
Change Title	x	x	x
Justification	x	x	
Description	x	x	x
Service Affected	x	x	x
Risk and Impact	x	x	
Backout Plan	x	x	
Implementation Plan	x	x	x

4. The CAB members associated with the Change Model's Change Type are automatically added to the **Standing Cab Members** tab in the form arrangement. Those members are also responsible for moving the Change Model through to activation.

Change Design Ideas

CSM provides a Change workflow with all the tools you need to successfully create and manage a Change. You can use this workflow as-is or tailor it to meet the needs of your organization.

Design ideas include:

- **Fields:** Change which fields are required and when and which fields support Rich Text.
- **View Counter:** Incrementally track the number of times a record is viewed by a customer or user in the CSM Desktop Client, CSM Browser Client, and CSM Portal. View Counter functionality is configured in CSM Administrator.
- **Statuses:** Modify Change statuses and/or the One-Step™ Actions that are initiated when a Change enters each status.
- **Form:** Change the form theme (background and text color), tab order, and size. Change the threshold and/or colors for priority.
- **Actions and One-Step Actions:** Create Actions/One-Step Actions to automate your workflow (example: Add another Approval process), or implement any of the unused sample One-Step Actions that are shipped with CSM (example: Create and send out a Change Review questionnaire).
- **Email:** Change the templates that are used to create the emails sent by Automation Processes, or disable/change when and to whom notifications are sent (example: Notify Change owners by email of any status updates).
- **Field Value Options:** Use Table Management to add/edit Lookup Object values for use in drop-down fields (example: CAB Members).
- **Approvals:** Modify the Approval process rules (example: The number or percentage of approvers needed to approve a Change).

Related concepts

Rich Text

Counters

One-Step Actions

Approvals

Forms

Automation Processes

Event Management

Event Management is a way to systematically observe services and service components, and record and report selected changes of state identified as events.

Security Events

Security Events are generated from multiple sources and can be created automatically and manually.

You can create Security Events from:

- All Configuration Items using the **Events** tab.
- Integration with a Security Information and Event Management (SIEM) and/or network monitoring systems.
- The drop-down list in the main toolbar of the CSM Desktop Client and the CSM Browser Client.

Related tasks
Create a Network or Security Event

Create a Network or Security Event

Create and manage Network or Security Events to determine if an action is required.

You can create an Incident, Service Request, or other record to help manage your Events. Close the Event if no further action is needed.

Network and Security Events will generally be opened via automation but can also be opened manually.

To create a Network or Security Event:

1. From the toolbar in the CSM Desktop Client or the CSM Browser Client, select **New > New Event > New Event - Network** or **New Event - Security**.
2. Provide a name and details.
3. Select an event type and service.
   Both fields are optional for a Network Event. For a Security Event, the **Event Type** field is required and the **Service** field is not available.
4. Select a priority and event severity.
5. Select a reported date time and who reported the Event.
   The **Reported Date Time** field is autopopulated and is a required field. The **Reported by** field is optional.
6. Select a source and provide an external source ID.
   The **Source** field is required, but the **External Source ID** field is optional.
7. (Optional) Assign the Event to a team and individual.
   You can also select the **Assign to Me** link in the **Actions** list.
8. Provide the response notes, cause code, and resolution details.

   Note: The **Response Notes** and **Resolution Details** fields are optional, but the **Cause Code** field is required before you can move the status to Resolved.

   The **Resolution Details** field is audited and Journal entries track modifications made. View the Journal - History entries in the **Journals** tab of the form arrangement.
9. (Optional) Initiate other Actions as appropriate using the links in the **Actions** list.
10. Select **Save**.
11. Work Items, Affected Users (Security), Network Events (Security), Similar Events, Security Events (Network), Incidents, Change Requests, and Configuration Items (CIs) associated with the Event will be listed in their respective tabs of the form arrangement. You can create new Work Items/Events and Incidents/Change Requests and link affected users, Events, and CIs in each tab.

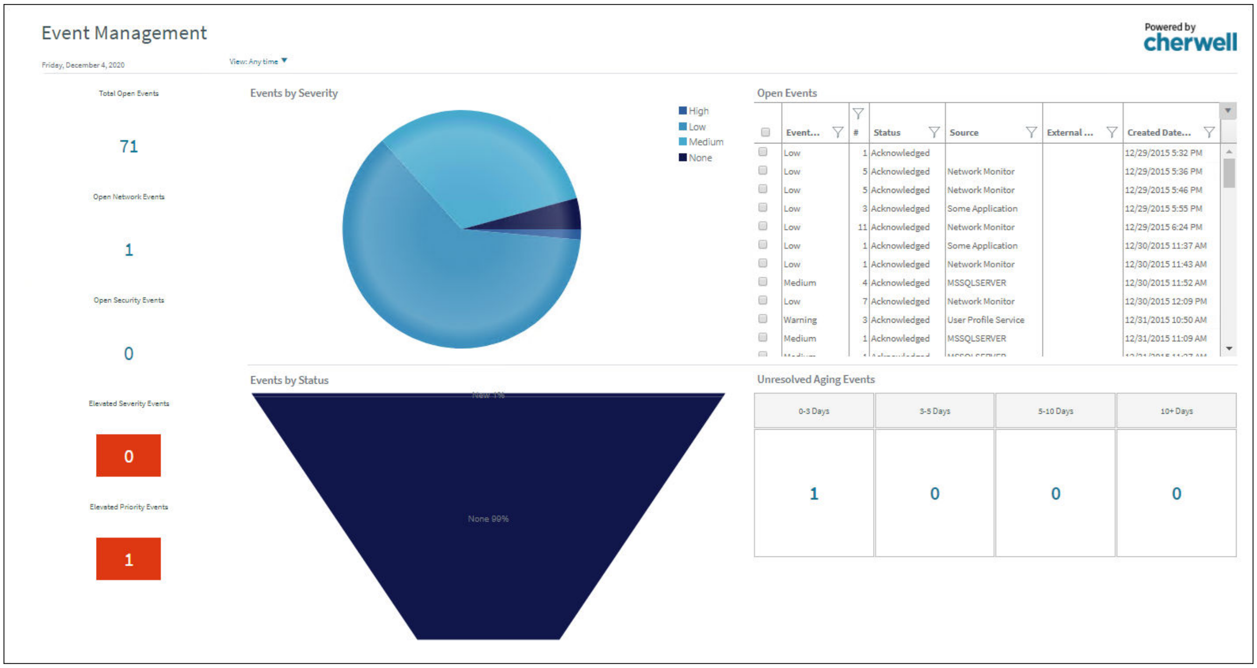
Related concepts

Security Events

Event Management Dashboard

The Event Management dashboard gives you at-a-glance information on Network and Security Events and severity and status data.

Use the Event Management Dashboard to monitor and take action on any Network or Security Events detected throughout your organization. Elevated Security and Priority Events are highlighted so you can easily drill down into the details. The Events by Status funnel widget allows management to ensure Events are reviewed and processed as soon as they are reported. Use the Unresolved Aging Events widget to take action on any Event aging unnecessarily, potentially putting your customers at risk.



Knowledge Management

Knowledge management is the process that ensures that all Knowledge in your CSM Knowledge Base is efficiently gathered, approved, stored, and shared with users and customers.

In CSM, Knowledge is stored mainly in Knowledge Articles (KAs) but can come from other Knowledge Sources as well, including Business Object records, attachments, and web sources (example: Google or YouTube).

For more information, see:

- About Knowledge
- Knowledge Features and Capabilities
- Knowledge Article Good to Know
- About Knowledge Articles

Risk Management

Risk management is the process that allows organizations to minimize risks associated with Suppliers by defining and tracking factors that could affect the delivery of a service.

About Risk

A Risk Assessment is a questionnaire that is used to evaluate the risk level of a Supplier. Users evaluate a Supplier using the Risk Questionnaire by answering questions related to Service Delivery risks and Service Disruption risks. As the User progresses through the questionnaire, Risk Weight definitions calculate the risk level, and then auto-populate Risk Chart using Low, Medium, High, and Extreme risk levels.

In CSM, Risk Assessment is a Supporting Business Object. The Risk Assessment form allows Users to view and manage Risk Assessments.

Note: Risk Weight is a Lookup Object that allows Users to define Risk Assessment properties (including categories, subcategories, point allocation, etc.) using Table Management.

Note: Risk Assessment can be used to support Multi-Sourcing Service Integration (MSI) and Service Integration and Management (SIAM). For more information, see The Relationship between CSM and Multi-Sourcing Service Integration and Service Integration and Management.

Risk Good to Know

- A Risk Assessment is a questionnaire that is used to evaluate the risk level of a Supplier.
- Risk Weight is a Lookup Object that allows Users to define Risk Assessment properties (including categories, subcategories, point allocation, etc.) using Table Management.
- Search for one or more Risk Assessments that meet a specific criteria by running a Quick Search or Search Group.
- Create a new Risk Assessment by clicking **Create a Risk Assessment** in a Supplier form.
- The OOTB system implements several Actions/One-Step Actions to make creating Risk Assessments more efficient. For more information about Actions and One-Step Actions, refer to the Actions/One-Step Actions documentation.

  Note: A full list of One-Step Actions is beyond the scope of this document. Export a schema document from CSM Administrator (Create a Blueprint>Tools>Export Schema) to view a full list of One-Step Actions associated with a particular type of Business Object (ex: Major).

- Press **TAB** to move to the next field on the form.
- Secure Risk Assessment records by controlling who can view, create, and edit records.

Scorecard Management

Scorecard management is the process that allows users to evaluate the performance of a supplier in real time.

About Scorecards

A Scorecard is a record that allows Users to view detailed Supplier performance data in real time. The Scorecard displays data that is automatically calculated based on quality, delivery, responsiveness, and complaints, and then presented as a letter grade in the Supplier form.

In CSM, Scorecard is a Supporting Object. The Scorecard form allows Users to view and manage Scorecards.

Note: Scorecard Weight and Scorecard Curve are Lookup Objects that allow Users to define Scorecard properties (categories, point allocation, grading system, etc.) using Table Management.

Note: Scorecard can be used to support Multi-Sourcing Service Integration (MSI) and Service Integration and Management (SIAM). For more information, see The Relationship between CSM and Multi-Sourcing Service Integration and Service Integration and Management.

Scorecard Good to Know

- A Scorecard is a record that allows Users to view detailed Supplier performance data in real time.
- The Scorecard displays data that is automatically calculated based on quality, delivery, responsiveness, and complaints, and then presented as a letter grade.
- Scorecard Weight and Scorecard Curve are Lookup Objects that allow Users to define Scorecard properties (categories, point allocation, grading system, etc.) using Table Management.
- Search for one or more Scorecards that meet a specific criteria by running a Quick Search or Search Group.
- Secure Scorecard records by controlling who can view records.

Service Cart Management

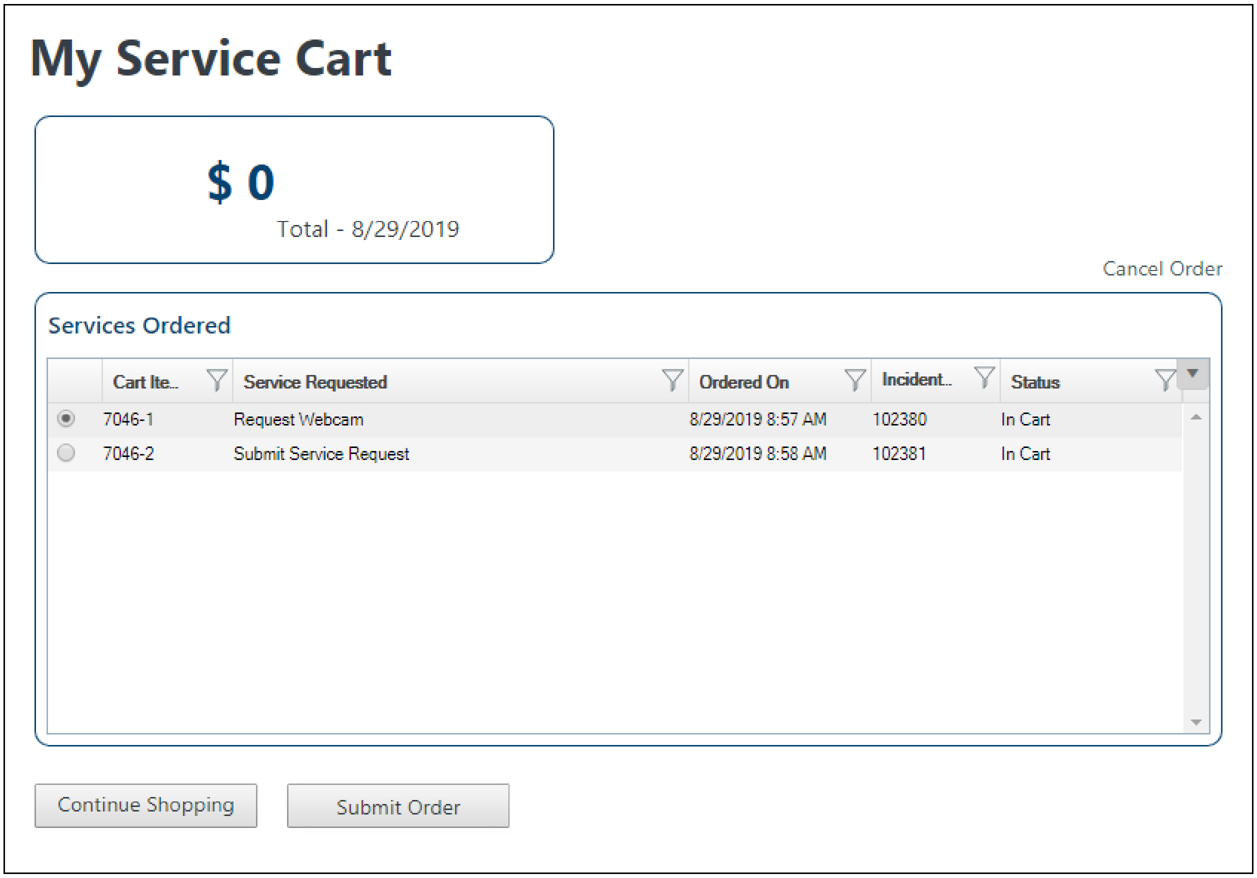
Service Cart management is the process that gives customers more control over their Service Requests and Service Orders.

Note: This feature is also available as a mergeable application (mApp Solution).

About Service Carts

CSM provides a service cart as a Major Business Object for customers to use in the supplied IT Portal.

A service cart is an e-commerce tool that allows customers to add multiple Service Requests to a single order, and then temporarily hold the items until they are ready to submit the full order. When the order is submitted, each Service Request automatically creates associated Tasks based on related Service Catalog Template Work Units. Technicians fulfill the Service Requests in CSM, and customers view and track the Service Requests (and Service Request history) on the **My Service Orders** page of the Customer Portal.



Note: Service Cart can be used to support Multi-Sourcing Service Integration (MSI) and Service Integration and Management (SIAM).

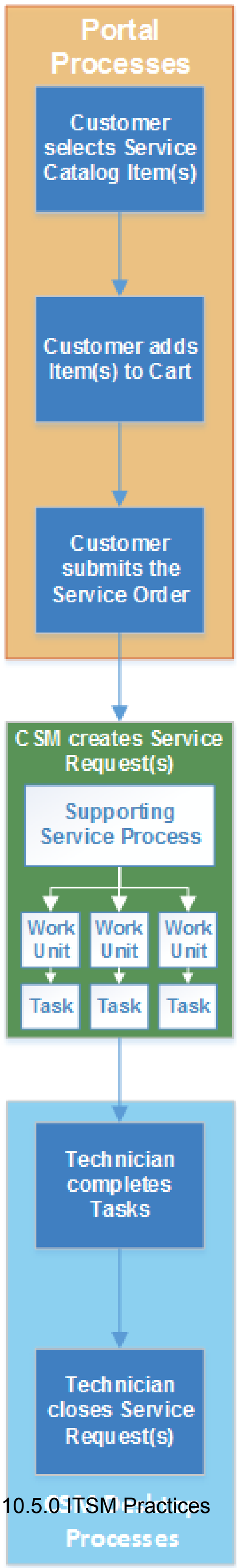
Service Cart Good to Know

- A Service Cart is an e-commerce tool that allows Customers to add multiple Service Requests to a single order, and then temporarily hold the items until they are ready to submit the order. When the order is submitted, each Service Request automatically creates associated Tasks based on related Service Catalog Template Work Units. Technicians fulfill the Service Requests in CSM, and Customers view and track the Service Requests (and Service Request history) on the My Service Orders page of the Customer Portal.
- CSM Provides an OOTB Service Cart as a Major Business Object for Customers to use in the OOTB IT Portal.
- Service Carts are automatically created when a Customer creates and saves a new Request in the Portal. Once the Customer submits the items in the Service Cart, the Service Requests are created in the CSM Desktop Client, and a Service Order is created that lists the details of the Customer's Service Request(s).
- Incidents logged in the Portal do not go into a Service Cart or Service Order. Only Service Requests are submitted via the Service Cart.
- CSM provides a read-only, editable OOTB Service Cart form available in CSM Administrator. The Service Cart form is separate from the Service Request forms available in the CSM Desktop Client and the Portal. For more information, refer to the Incident documentation.
- The OOTB CSM system implements several Actions and One-Step Actions to make working with the Service Cart more efficient. For more information about Actions and One-Step Actions, refer to the Actions/One-Step Actions documentation.
- CSM provides several OOTB Service Cart Saved Searches that make finding Service Requests, creating Widgets, and running Reports easier and faster.
- The OOTB CSM system implements several Automation Processes to automate Service Cart Management (ex: Sending Customers reminders about their abandoned Service Carts). For more information, refer to the Automation Process documentation.

Service Cart Workflow

Note: The Service Cart has its own workflow separate from the Incident/Service Request workflow. For more information about the workflow, phases, and statuses of Incidents and Service Requests, refer to the Incident documentation.

The following figure shows a high-level Service Cart process workflow in the OOTB CSM system.


Portal Processes
Customer selects Service Catalog Item(s)
Customer adds Item(s) to Cart
Customer submits the Service Order
CSM creates Service Request(s)
Supporting Service Process
Work Unit
Work Unit
Work Unit
Task
Task
Task
Technician completes Tasks
Technician closes Service Request(s)
Processes

Note: CSM uses several features to manage the Service Cart workflow. The Service Request forms in the Portal help create and manage items in the Service Cart. Automation Processes notify Customers via e-mails about the status of their Service Orders. The Service Cart Dashboards allow Customers to track their open and past Service Orders.

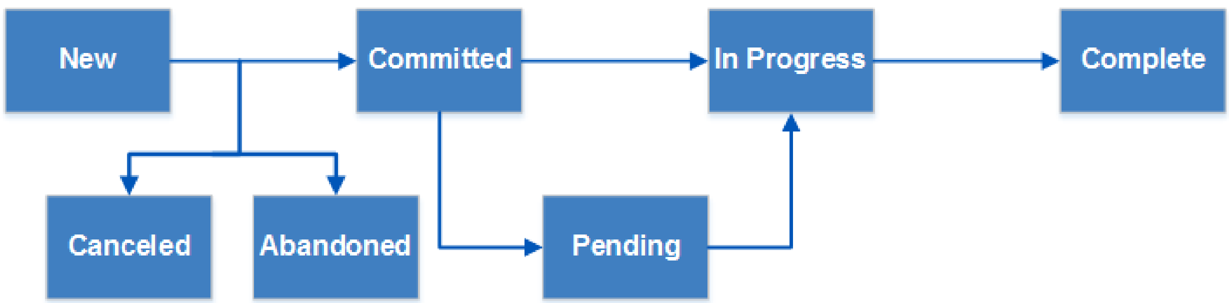
Contributors

A Service Cart typically involves the following contributors:

- Customer: The Portal Customer who logs Service Requests.
- Technician: The User who manages and completes the Service Requests.

Statuses

A Service Cart progressing through the workflow encounters the following statuses:



1. **New:** Customer has created and recorded the initial details of a Service Request(s) in the Portal.
2. **Committed:** Customer has submitted their Service Order in the Portal.
3. **Pending:** The Service Order is temporarily paused or on hold.
4. **In Progress:** A technician in the CSM Desktop Client is investigating/fulfilling the Service Order.
5. **Complete:** A technician has resolved and closed the Service Order.
6. **Canceled:** The Customer who created and recorded the initial details of the Service Order has canceled the order in the Service Cart before submitting it.
7. **Abandoned:** The Customer who created and recorded the initial details of the Service Order has abandoned their order in the Service Cart without canceling or submitting it.

Using Service Carts

When working with Service Carts, Users can:

Add Items to the Service Cart

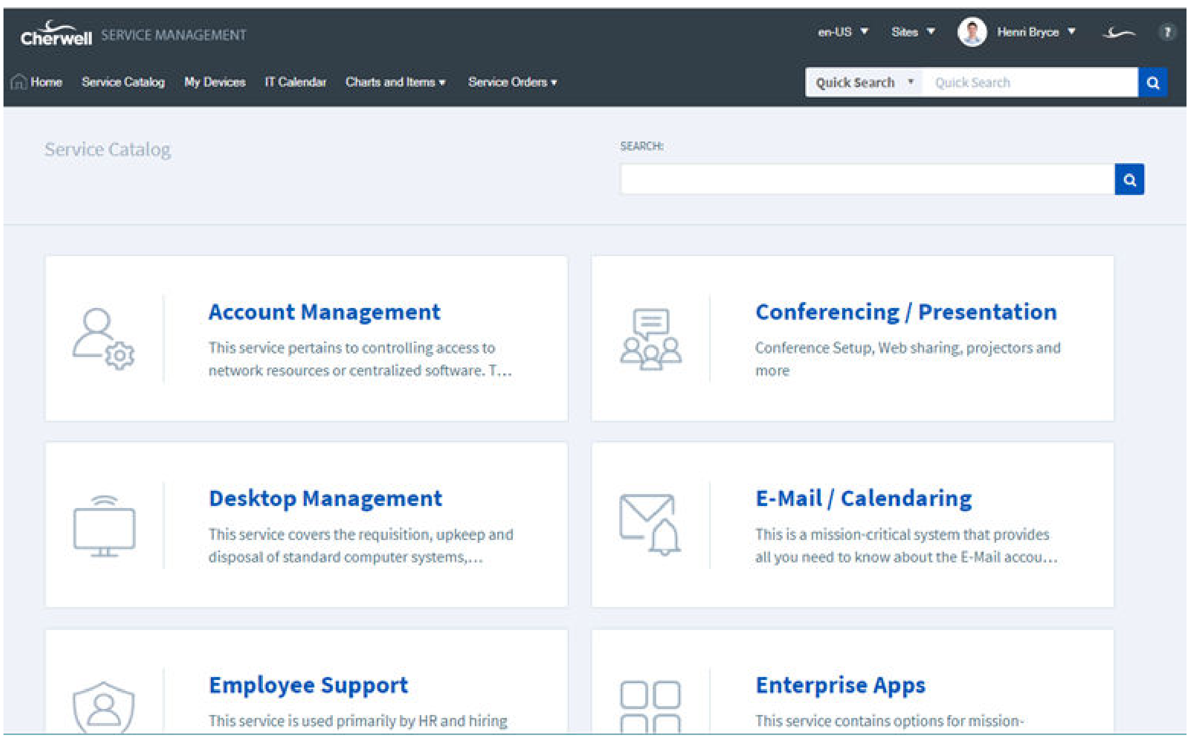
Service Carts are automatically created when a Customer creates and saves a new Request in the Portal. Once the Customer submits the items in the Service Cart, the Service Requests are created in the CSM Desktop Client, and a Service Order is created that lists the details of the Customer's Service Request(s).

Note: Incidents logged in the Portal do not go into a Service Cart or Service Order.

To add an item to a Service Cart:

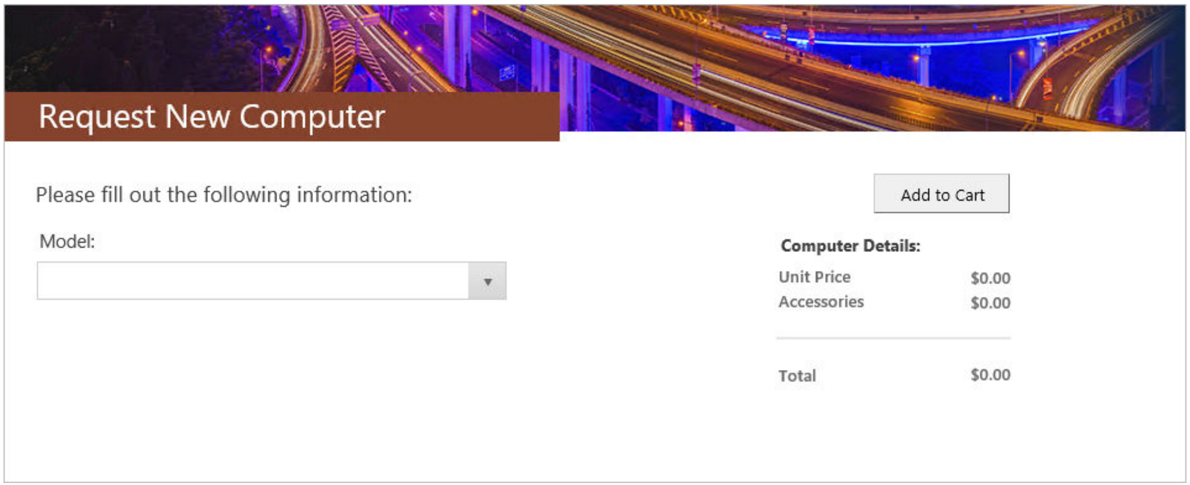
1. Log in to the Portal
2. Click the **Service Catalog** button on the menu bar.

   The Service Catalog opens.



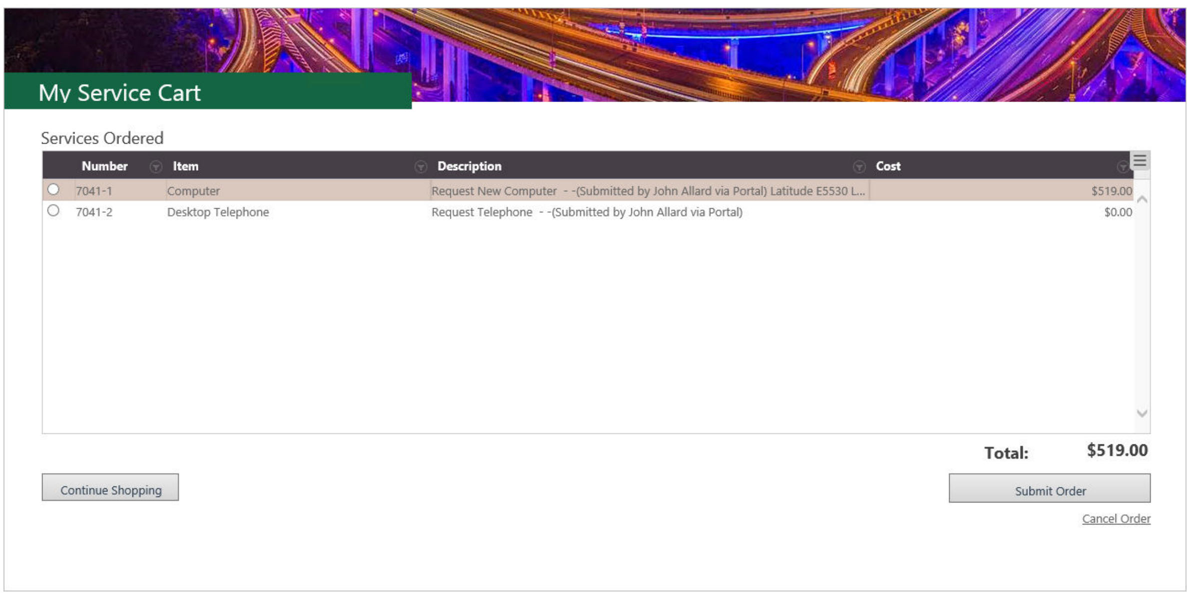
3. Select a **Request** (ex: Request New Computer).

   The Request form opens.



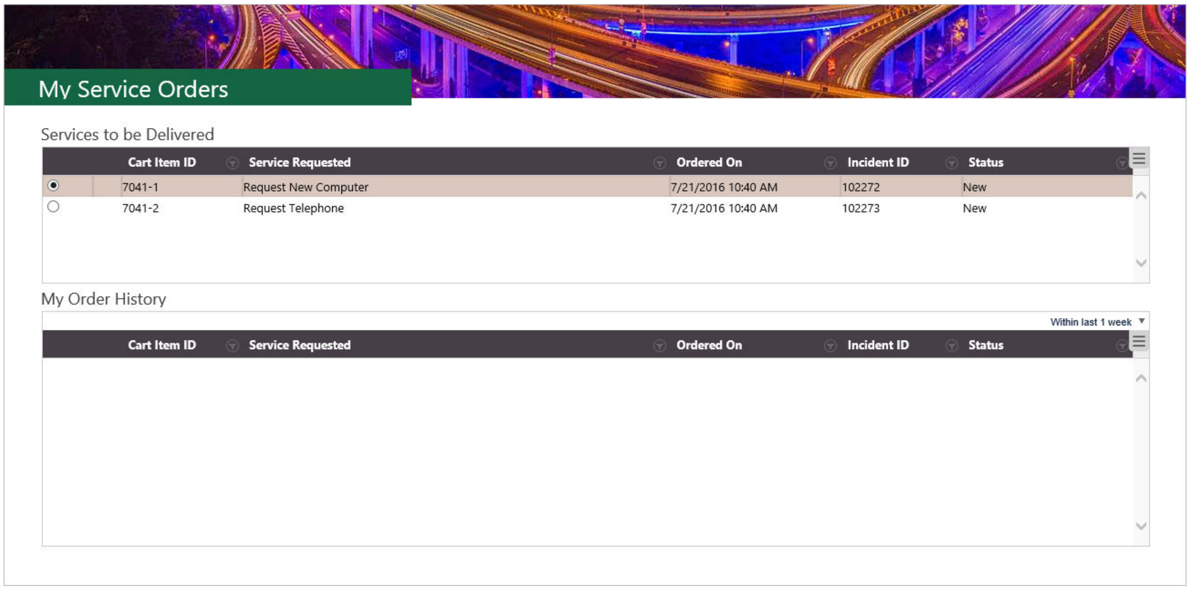
4. Complete the Request form.
5. Click the **Add to Cart** button.

   The My Service Cart Dashboard opens.



   To add more Requests to the Service Cart, click **Continue Shopping** to return to the Service Catalog. Click **Cancel Order** to cancel the entire order (you are prompted to verify before your order is canceled).

6. Submit the Service Cart by clicking the **Submit Order** button. The My Service Orders Dashboard opens and shows the status of all current and past Service Orders. Customers can click on an item in the Grid to open the Service Request.


My Service Orders
Services to be Delivered
Cart Item ID
Service Requested
Ordered On
Incident ID
Status
7041-1
Request New Computer
7/21/2016 10:40 AM
102272
New
7041-2
Request Telephone
7/21/2016 10:40 AM
102273
New
My Order History
Within last 1 week
Cart Item ID
Service Requested
Ordered On
Incident ID
Status

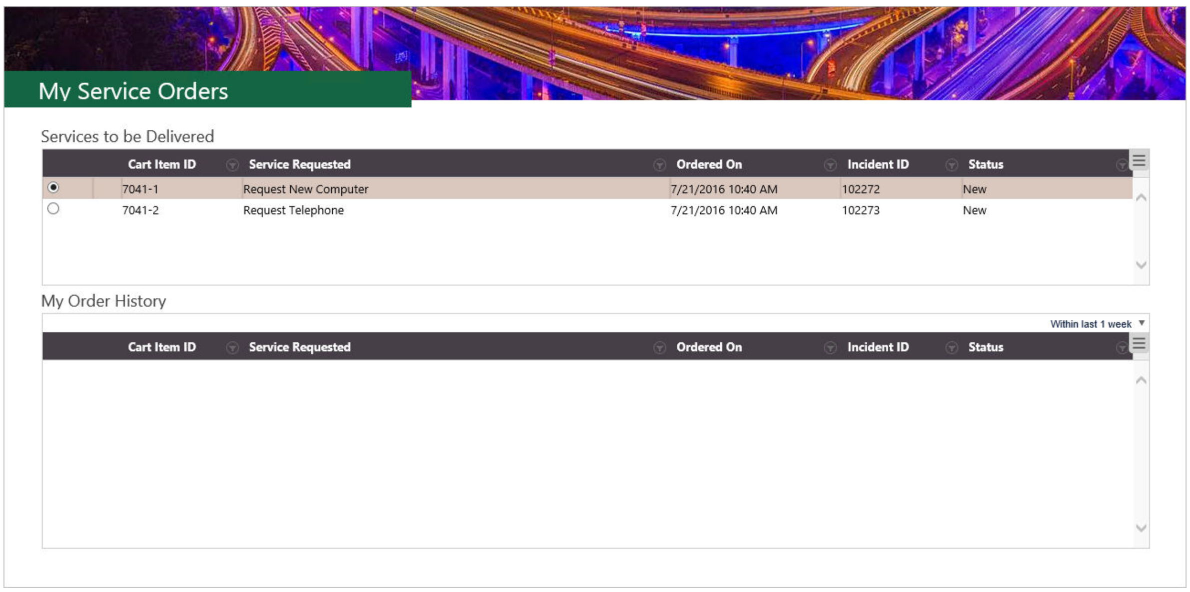
View Items in a Service Order

Once a Service Request has been submitted, Customers can view the status of their current Service Orders and review past Service Orders using the My Service Orders Dashboard.

To view items in a Service Order:

1. Log in to the Portal
2. Click the **Service Orders** drop-down in the menu bar, and then select **My Orders**.

   The My Service Orders Dashboard opens.

3. Select an **item** from the Grids to open the specific Service Request.

Service Cart Features

CSM provides the following tools to help manage the Service Cart:

- Form
- Dashboards
- One-Step Actions
- Saved Searches
- Automation Processes

Service Cart Form

CSM provides a read-only OOTB Service Cart form available in CSM Administrator. The Form is comprised of two main areas:

1. Default Form: Displays important at-a-glance information (Service Order ID, Status bar, record ownership, etc.).
2. Form Area: Displays the main Form details and Fields.

Note: The Service Cart form is separate from the Service Request forms available in the CSM Desktop Client and the Portal. For more information, refer to the Incident documentation.

Service Cart Form Fields

Field	Description	Comments
Default Form		
Service Order	Record type and unique record identifier (ID).	CSM automatically assigns the ID when the Service Cart is created.

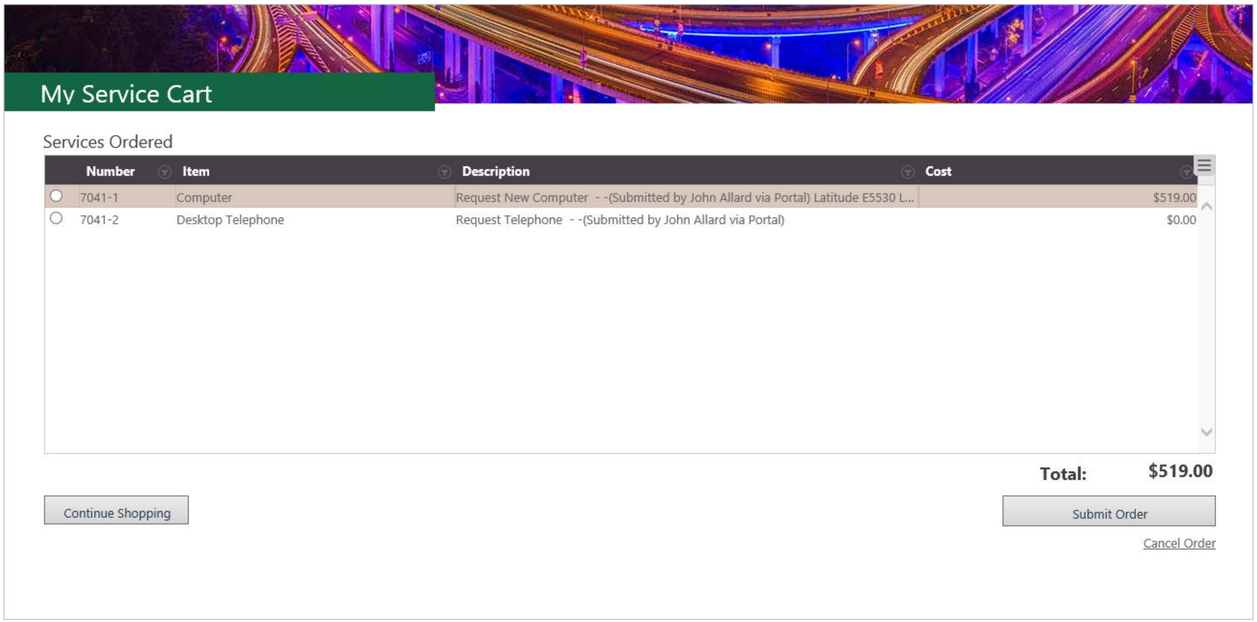
Field	Description	Comments
Status	Statuses include: • **New:** Customer has created and recorded the initial details of a Service Request(s) in the Portal. • **Committed:** Customer has submitted their Service Order in the Portal. • **Pending:** The Service Order is temporarily paused or on hold. • **In Progress:** A technician in the CSM Desktop Client is investigating/ fulfilling the Service Order. • **Complete:** A technician has resolved and closed the Service Order. • **Canceled:** The Customer who created and recorded the initial details of the Service Order has canceled the order in the Service Cart before submitting it. • **Abandoned:** The Customer who created and recorded the initial details of the Service Order has abandoned their order in the Service Cart without canceling or submitting it.	
Requester	Name, avatar, e-mail address, and phone number associated with the requester (i.e., the Portal Customer who submitted the Service Order).	
Form Area - Details		
Created On	Date on which the Service Order was created.	The date is generated using the ServiceCart.CreatedDateTime Text Expression.
Estimated Cost	Estimated Cost of the Service Order.	The estimated cost is calculated using the Estimated Total Cost Text Expression.
Items	Total number of Service Requests in the Service Order	The number of items is calculated using the numeric Count Items Expression.
% Complete	Percentage of the Service Order that is currently complete.	The percentage is calculated using the Percentage Complete Text Expression.
Items Pending	Items in the Service Order with a status of Pending.	The number of items with a Pending status is calculated using a numerical Count Items Pending Expression.

Field	Description	Comments
In Progress	Items in the Service Order with a status of In Progress.	The number of items with an In Progress status is calculated using a numerical Count Items In Progress Expression.
Complete	Items in the Service Order with a status of	The number of items with a Complete status is calculated using a numerical Count Items Complete Expression.
Canceled	Items in the Service Order with a status of	The number of items with a Canceled status is calculated using a numerical Count Items Canceled Expression.

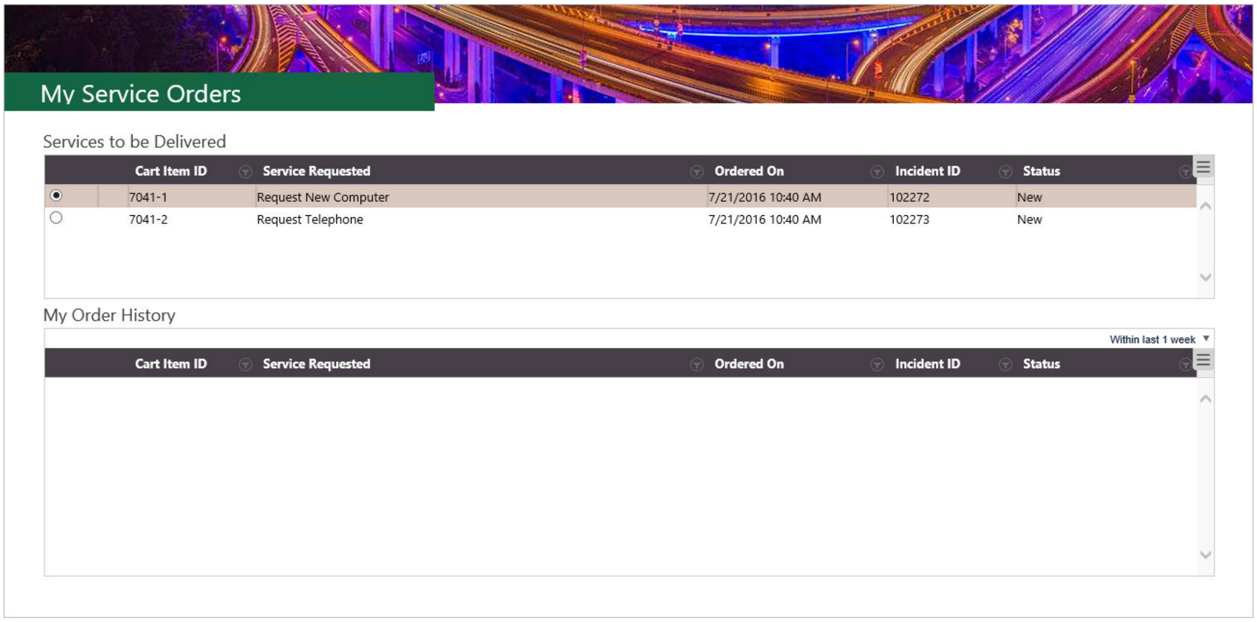
Service Cart Dashboards

CSM provides the Service Cart and My Service Orders Dashboards for Customers to manage and view their Service Orders in the OOTB IT Portal.

The My Service Cart Dashboard displays Service Orders that have been created but not yet submitted for a technician to address in a Grid. Customers can cancel the order (by clicking the Cancel Order button) or submit the order (by clicking the Submit Order button).



Once a Customer submits a Service Order, they can monitor the status of their Service Requests on the My Service Orders Dashboard, as well as past Service Orders.



Note: Service Request metrics are also available on other Dashboards, including Requests, Global IT, and Executive.

My Service Cart Dashboard Widgets

Item	Description	Widget Type	Widget Name	Widget Uses:
Services Ordered	List of all Service Requests saved but not yet submitted in the Service Cart	Search Results List	Service Cart Item Grid	Custom Query: Incident.Service Cart ID equals Service Cart ID Stored Value and Incident.Withdraw is not equal to True.
Continue Shopping	Runs the Service Catalog Action to return the User to the Service Catalog.	Button (Action) Widget	Continue Shopping	Service Catalog Action
Cancel Order	Runs the Cancel Service Cart Order Action to cancel the order.	Button (Action) Widget	Cancel Service Cart Order	Cancel Service Cart Order Action
Submit Order	Runs the Submit Service Cart Order Action to submit the order.	Button (Action) Widget	Submit Service Cart Order	Submit Service Cart Order Action

My Service Orders Dashboard Widgets

Item	Description	Widget Type	Widget Name	Widget Uses:
Filter	Filters data in the Search Results Grid.	Filter	Service Order Status	Filter by Lookup Table
Services to be Delivered	List of all Service Requests that have been submitted and are currently open.	Search Results List	My Open Service Orders	My Open Service Order Items Saved Search
My Order History	List of all Service Requests that have been submitted and closed.	Search Results List	My Service Order History	My Closed Service Order Items Saved Search

Service Cart One-Step Actions

CSM provides several OOTB Service Cart One-Step Actions, including:

One-Step Action	Description/Actions	Associations	Executed From
Blueprint			
Create Incidents	Create Incidents from Service Cart Items. Once a Customer submits the Service Order, CSM creates Incidents/Service Requests based on the information provided in the Service Order, and then runs the In Progress One-Step Action to change the Service Cart status to In Progress.	Service Cart	One-Step Action Manager, Submit button on the Portal My Service Cart Dashboard.
Go to Cart	From the Summary form, the One-Step Action takes the Customer to the Service Cart.	Service Cart	One-Step Action Manager, submission of the Service Order to the Service Cart
Set Estimated Total Cost	Sets the Total Cost field in the Service Cart based on the sum of all costs in the Service Order.	Service Cart	One-Step Action Manager, submission of the Service Order to the Service Cart
Blueprint - Email Messages			
E-mail Reminder	Sends the Customer a reminder about Service Carts that have not been submitted or committed for a technician (ex: The Cart has been abandoned).	Service Cart	One-Step Action Manager, when the Service Cart exceeds the Service Cart Expiration date (three days after the Service Cart has been created)
Order Canceled	Sends the Customer a notification that the Service Order has been canceled or the Service Cart has been abandoned.	Service Cart	One-Step Action Manager, when the Service Order has been canceled.
Order Confirmation	Sends the Customer a notification with the Service Order details, including Cart Item IDs, Total Cost, and Cart Item Costs.	Service Cart	One-Step Action Manager, when the Service Order has been submitted.
Blueprint - Status Actions			
Abandoned	Sets the status of the Service Cart to Abandoned if the Cart remains in a New status for more than twice the number of days specified in the Abandoned Cart Reminder Stored Value.	Service Cart	One-Step Action Manager, when the Service Cart exceeds twice the number of days specified in the Abandoned Cart Reminder Stored Value.

Canceled	Sets the status of the Service Cart to Canceled if all Service Cart Items are canceled.	Service Cart	One-Step Action Manager, when all items in a Service Cart are canceled.
Complete	Sets the status of the Service Cart to Complete when all items in the Service Cart have been completed.	Service Cart	One-Step Action Manager, when all items in a Service Cart are complete.
In Progress	Sets the status of the Service Cart to In Progress when the items in the Cart have been submitted and Service Requests have been created in CSM for each Cart item.	Service Cart	One-Step Action Manager, when all items in the Service Cart have Service Requests.
New	Sets the status of the Service Cart to New when the Service Cart has been created.	Service Cart	One-Step Action Manager, when the Service Cart is first created.
Submitted	Sets the status of the Service Cart to Submitted when items in the Service Cart have been submitted as a Service Order	Service Cart	One-Step Action Manager, when the items in the Service Cart have been submitted as a Service Order.
Global			
Send E-mail to Customer	Sends an e-mail to the Customer who submitted the Service Cart Order.	Service Cart	One-Step Action Manager

A full list of One-Step™ Actions is beyond the scope of this document. Export a schema document from CSM Administrator (**Create a Blueprint > Tools > Export Schema**) to view a full list of One-Step Actions associated with a particular type of Business Object.

Service Cart Saved Searches

CSM provides several OOTB Service Cart Saved Searches, including:

Saved Search	Returns	Association	Executed From
All Service Carts	All Service Carts, regardless of status.	Service Cart	Search Manager, Metrics, Widgets
Canceled or Abandoned Service Carts	Service Carts that have been canceled or abandoned.	Service Cart	Search Manager, Metrics, Widgets
Complete Cart Items	Service Cart Items with a status of Complete.	Service Cart	Search Manager, Metrics, Widgets
Cost	Service Cart items where the Total Cost field contains a value.	Service Cart	Search Manager, Metrics, Widgets
In Progress Cart Items	Open Service Cart items with a status of In Progress.	Service Cart	Search Manager, Metrics, Widgets
New Cart Items	Open Service Cart items with a status of New.	Service Cart	Search Manager, Metrics, Widgets
New Service Carts	Open Service Cart Orders with a status of New.	Service Cart	Search Manager, Metrics, Widgets
New Service Items	Open Service Cart Orders with a status of New.	Service Cart	Search Manager, Metrics, Widgets
Pending Cart Items	Open Service Cart Orders with a status of Pending.	Service Cart	Search Manager, Metrics, Widgets
Submitted Cart Items	Open Service Cart Orders with a status of Submitted.	Service Cart	Search Manager, Metrics, Widgets

Service Cart Automation Processes

CSM provides the following OOTB Service Cart Automation Processes:

Name	Description
Send Abandoned Cart Reminder	When a Service Cart has been created and abandoned for three (3) days, the process initiates the Email Reminder One-Step Action, which sends a notification e-mail to the Service Cart creator about the Service Cart's status. The creator can then continue with the Service Cart or abandon the order.
Send Order Confirmation	When a Service Cart Order status is changed by a technician to Submitted, the process initiates the Order Confirmation One-Step Action, which sends a notification e-mail to the Customer with the order details.
Service Cart Complete	When the items in a Service Cart are all set to Resolved status, the process initiates a One-Step Action to set the Service Cart Order status to Complete and send a notification e-mail to the Customer about the change.

Service Catalog Template Management

Service Catalog Template management is the process that allows users to manage small amounts of work, comprised of Work Units, using Service Catalog Templates (SCTs).

SCTs are available to customers from the Service Catalog in the CSM Portal.

About Service Catalog Templates

A Service Catalog Template (SCT) automates many processes and allows repetitive steps to be reused so you don't have to create new steps. A Work Unit (WU) is a small amount of work done by a single team or individual. An SCT is a collection of work units that work together.

When you must perform a series of tasks to complete an Incident or Service Request, the steps may be similar, but vary depending on the end goal. Use Service Catalog Templates instead of writing several One-Step™ Actions to create the tasks. SCTs and Work Units can accomplish the work quickly and save time.

For example, the following steps for receiving a new printer and receiving a new laptop are similar.

To receive a new printer:

1. Unbox and label.
2. Test the unit.
3. Place in storage for later use.

To receive a new laptop:

1. Unbox and label.
2. Test the unit.
3. Load default software package.
4. Place in storage for later use.

Each of the steps above can be considered a Work Unit, so you can organize the WUs with two Service Catalog Templates: Receive New Printer and Receive New Laptop.

Receive New Printer

Work Units
Unbox and label
Test the unit
Place in storage for later use

Receive New Laptop

Work Units
Unbox and label
Test the unit
Load default software package
Place in storage for later use

For additional examples, see Service Catalog Template Examples.

Good to Know

- Search for one or more Service Catalog Templates that meet a specific criteria by running a quick search or search group.
- By default, SCT uses the Incident Service subcategory structure. Navigate to category options by selecting **Tools > Table Management > Type > Incident Category**.
- CSM implements several Actions and One-Step Actions to make creating Service Catalog Templates more efficient.

  Note: A full list of One-Step Actions is beyond the scope of this document. Export a schema document from CSM Administrator (**Create a Blueprint > Tools > Export Schema**) to view a full list of One-Step Actions associated with a particular type of Business Object (example: Major).

- Secure SCT records by controlling who can view, create, and edit records.

Service Catalog Templates can be used to support Multi-Sourcing Service Integration (MSI) and Service Integration and Management (SIAM). See The Relationship between CSM and Multi-Sourcing Service Integration and Service Integration and Management.

Related tasks
Create a Service Catalog Template
Related information
About Quick Search
About Saved Searches
About One-Step Actions
About Security Groups

Create a Service Catalog Template

CSM provides several default Service Catalog Templates (SCTs) or you can create your own to meet the needs of your organization. The SCT form allows users to view, create, track, and manage SCTs.

The Incident categorization (and ability to complete the Task within the specified Service Level Agreement [SLA]) determines which Service Catalog Templates are available. For example, if a technician has a Service Request for a new employee, only SCTs appropriate for new employees are displayed.

You can also limit which Service Catalog Templates appear based on the anticipated SLA timeframes. If an employee needs a new printer and there are two SCTs that apply, but one of them doesn't allow the technician to meet the SLA in time, the only Service Catalog Template displayed is the one that meets the criteria. In addition, if there is an SCT that can't be fulfilled in time, display that information to the technician so they have the option to choose that Service Catalog Template anyway.

To create a Service Catalog Template:

1. On the CSM Desktop Client or the CSM Browser Client toolbar, select **New > New Service Catalog Template**.
   A new SCT record is created with a unique ID and a status of New.
2. Provide a title and portal title (example: New Employee Setup).
   The portal title autopopulates based on the **Title** field. You can provide a different title for the Portal (**Service Catalog** page), if necessary.
3. Provide a description and portal description (example: Create all necessary items for a new employee setup). The portal description autopopulates based on the **Description** field. You can provide a different description for the Portal (**Service Catalog** page), if necessary.
   To format the text or embed an image, select the **Zoom** button .
4. Select a service classification that matches the service, category, and subcategory. This setting determines when the Service Catalog Template can be run. The classification in the Incident must match the SCT classification before you can activate the Service Catalog Template.
   An abbreviated read-only Service form displays in the form arrangement.
5. (Optional) The critical path time units autopopulate based on attached SLAs, Work Units (WUs), and dependencies. This is one way to organize the SCT.

   Note: The critical path creates a cumulative process completion time based on all attached SLAs, WUs, and dependencies. Service Catalog Templates can be linked to WUs and Incidents from within the SCT form, a Work Unit form, or an Incident form.

6. (Optional) Select a category (example: HR Process) and choose a timeframe from the Business Hours Manager (the business hours that apply to the process).
   The category allows users to filter Service Catalog Templates for saved searches and reports.
7. In the Default form, select the **Select Owner** link to assign a business owner, and assign an IT process owner (if different from the creator) by selecting one of the ownership links:
   - **Creator's name** (example: Henri Bryce): Select this link to select a user owner.
   - **Creator's Team** (example: 3rd Level Support): Select this link to first select a team owner, and then select the owner.

After providing the details of the SCT, select the WUs that make up the Service Catalog Template.

8. To add Work Units to the SCT, select the **Add a Work Unit** link.
   The **Work Unit Selector** window opens displaying available WUs.
   a. Select a Work Unit from the grid. Linked WUs appear in the **Work Unit** tab of the form arrangement as they are added to the Service Catalog Template. To view the detailed Work Unit form, select the **Jump** button in the form arrangement toolbar. The WUs populate the **Work Unit Order** tab where they are organized by the system.

      Note: As Work Units are added, dependencies can also be added to dictate the order in which the WUs are completed. Work Units with dependencies are easily viewed in the **Work Unit Order** tab. For example, before the PC can get an Asset Tag, the laptop must first be acquired.

   b. (Optional) Manage WUs in the **Work Unit Functions** section by selecting any of the following links. These won't appear in the SCT unless it has Work Units or dependencies linked to it.
      - **Visualize the Service Catalog Template**: Displays a visual workflow diagram of the Service Catalog Template. This link is only available after the SCT is activated.
      - **Add a Work Unit**: Adds additional Work Units to the SCT.
      - **Delete a Work Unit**: Removes an existing WU from the Service Catalog Template. This does not delete the Work Unit from the system, only from the SCT.
      - **Reorder the Work Units**: Changes the order of the WUs. This link is only available when there are two or more Wrok Units.
      - **Update Completion Times**: Automatically syncs supplier agreements with WUs and updates the critical path time.
      - **Add a Dependency**: Adds a dependency to a Work Unit; so when the SCT is run, one Task will be dependent upon another Task. The WU that is depended upon must be completed before the dependent Work Unit can be completed. This link is only available when there are two or more WUs.
      - **Remove a Dependency**: Removes a previously created dependency.
      - **Add a Note to Work Unit**: Provides additional information related to the Work Unit. When the WU becomes a Task, the defined note displays in the **Description** field on the Task. This note appears only in the Service Catalog Template.
      - **Remove a Note from Work Unit Task**: Remove an existing note from the Work Unit Task.
9. Select the **Next: Active** link in the Default form to activate the SCT.
   The status changes to Active and the Service Catalog Template is available to customers from the **Select Available SCT** link in the **Actions** list. When an SCT is selected, a Service Request is created and the associated WUs transform into Tasks, which are required to close the Service Request.
   An SCT can only activate once per Incident. When a Service Catalog Template is activated, it creates Tasks based on the Work Units; one Task per WU. After the Tasks have been created, there is no further connection between the SCT/Work Unit and the Incident.

To retire the Service Catalog Template, select the **Next: Retired** link in the Default form.

Related concepts

Service Catalog Template Examples

Related tasks

Create a Work Unit

Related information

About Rich Text

Service Catalog Template Examples

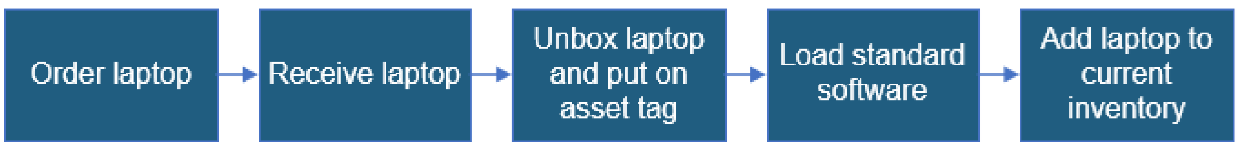
Common examples of Service Catalog Templates (SCTs) include acquire a generic laptop, acquire an executive laptop, and new employee setup.

You can reuse repetitive steps as Work Units (Tasks) to automate many processes. Examples of a few of those processes are listed below. These steps are general guidelines, so you can customize the steps to meet your organizational needs.

Acquire Generic Laptop

To acquire a generic laptop:

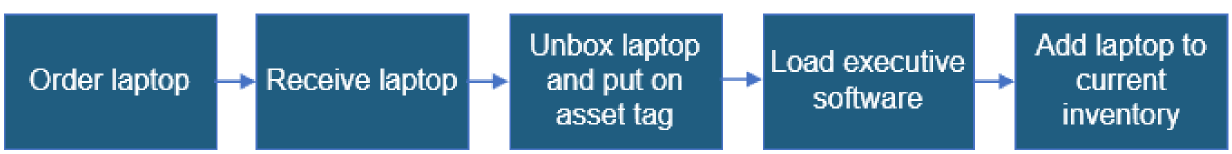
1. Order laptop.
2. Receive laptop.
3. Unbox laptop and put on asset tag.
4. Load standard software.
5. Add laptop to current inventory.



Acquire Executive Laptop

To acquire an executive laptop:

1. Order laptop.
2. Receive laptop.
3. Unbox laptop and put on asset tag.
4. Load executive software.
5. Add laptop to current inventory.

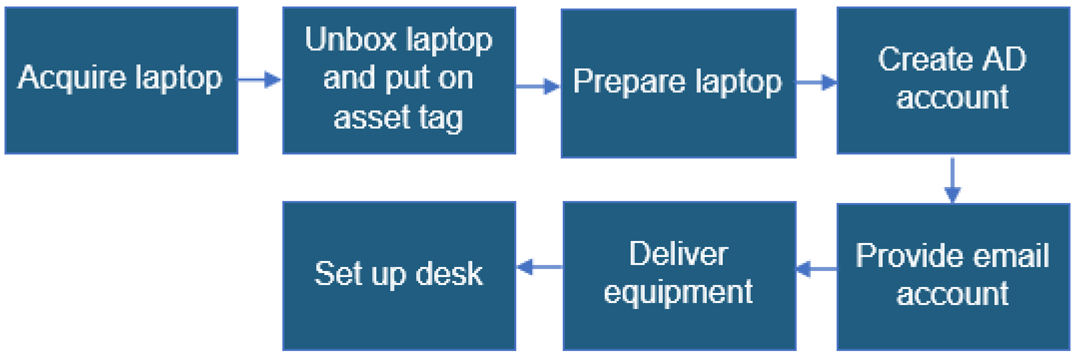


New Employee Setup

To set up a new employee:

1. Acquire laptop.

2. Unbox laptop and put on asset tag.
3. Prepare laptop.
4. Create AD account.
5. Provide email account.
6. Deliver equipment.
7. Set up desk.



Related tasks
Create a Service Catalog Template

Site and Building Management

Site and Building management is the process that allows Site and Building Managers to effectively monitor the relationship between one or more Sites and associated Buildings related to a customer, Configuration Item (CI), or other applicable Business Objects.

About Site and Building Records

Learn about how Site and Building records are used.

A Site is a physical location that can include one or more Building records, though a Site might exist without associated Building records (example: Your USA Headquarters might only have one location). Sites and Buildings can be associated with a Customer, Configuration Item (CI), or other applicable Business Objects. Site and Building Managers monitor and update the location records and relationships, as necessary.

Sites and Buildings are Major Business Objects. Their associated forms allow Users to view, create, track, and manage location information.

Creating Site and Building Records

Access procedures for creating Site and Building records.

Create a Site Record

Walk through the typical steps to create a Site record.

To create a Site record:

1. On the CSM Browser Client or CSM Desktop Client toolbar, click **New>New Site**.

   A new Site record is created with a status of New.

2. Provide information about the Site in the Overview:
   a. **Site Name:** Provide a name (example: USA Headquarters). This is a required field.
   b. **Address:** Provide an address (example: 10125 Federal Drive).
   c. **Address 2:** Provide additional address information (example: Suite 100).
   d. **Country:** From the drop-down, select the country associated with the Site (example: United States of America).
   e. **State/Province/Territory:** From the drop-down, select the name of the state, province, or territory associated with the Site (example: Colorado).
   f. **City:** Provide the name of the city (example: Colorado Springs).
   g. **Postal Code:** Provide the zip code (example: 80908).
   h. **Region Code:** From the drop-down, select a region code (example: Western United States).
   i. **Notes:** Provide other important information for the Site.
3. The Site record creator is automatically assigned as the Owner. Assign a different Site Manager or Team in the Default Form by clicking the Site Manager or Team name links.

   Note: You can also change the SIte Manager by selecting the **Assign To...** link under Actions.

4. Activate the Site by clicking the **Next: Active** link in the Status bar.

   The status changes to Active and the Site is available.

5. (Optional) Create Building records to associate with the Site:
   a. Click the **New Building** button in the Form Arrangement.
   b. Complete the Building form.
6. (Optional) To deactivate the Site, click the **Next: Inactive** link in the Status bar.

   Note: The status of the Building records associated with the Site must be set to Inactive before the Site can be deactivated.

Create a Building Record

Walk through the typical steps to create a Building record.

To create a Building record:

1. On the CSM Browser Client or CSM Desktop Client toolbar, click **New>New Building**.

   A new Building record is created with a status of New.

2. Provide information about the Building in the Overviewn:
   a. **Site:** From the drop-down menu, select the site associated with the Building (example: USA Headquarters).
   b. **Building Name:** Provide a name for the Building. This is a required field.
   c. **Address:** This field auto-populates using the address from the associated Site record. If necessary, provide a different address.
   d. **Address 2:** Provide additional address information for the Building.
   e. **Country:** This field auto-populates using the country from the associated Site record. If necessary, provide a different country.
   f. **State/Province/Territory:** This field auto-populates using the state/province/territory from the associated Site record. If necessary, provide a different state, province, or territory.
   g. **City:** This field auto-populates using the city from the associated Site record. If necessary, provide a different city.
   h. **Postal Code:** This field auto-populates using the zip code from the associated Site record. If necessary, provide a different zip code.
   i. **Region Code:** This field auto-populates using the region code from the associated Site record. If necessary, provide a different region code.
   j. **Full Address:** Provide the full address for the Building.
   k. **Notes:** Provide other important information for the Building.
3. Assign a Building Manager in the Default Form by clicking one of the ownership links:
   - **Select Owner**: Click to first select a Team owner and then a User owner.
   - **Select Team**: Click to select a Team owner.

   Note: You can also take ownership of the Building by selecting the **Assign to Me** link.

4. Activate the Site by clicking the **Next: Active** link.

   The status changes to Active and the Building record is available.

5. (Optional) To deactivate the Building, click the **Next: Inactive** link or click the **Set Status to Inactive** link.
6. (Optional) To mark the Building as Vacant, click the **Set Status to Vacant** link.

Supplier Catalog Item Management

Supplier Catalog Item management is the process that allows users to manage generic products or services that are provided by an internal or external supplier.

About Supplier Catalog Items

A Supplier Catalog Item is a generic product or Service that is provided by an internal or external Supplier to an organization's Customers.

In CSM, Supplier Catalog Item is a Major Business Object. The Supplier Catalog Item form allows Users to view, create, track, and manage Supplier Catalog Items.

Note: Supplier Catalog Item can be used to support Multi-Sourcing Service Integration (MSI) and Service Integration and Management (SIAM). For more information, see The Relationship between CSM and Multi-Sourcing Service Integration and Service Integration and Management.

Supplier Catalog Item Good to Know

- A Supplier Catalog Item is a generic product or Service that is provided by an internal or external Supplier to an organization's Customers.
- Search for one or more Supplier Catalog Items that meet a specific criteria by running a Quick Search or Search Group.
- Create a new Supplier Catalog Item by clicking New>New Supplier Catalog Item on the CSM Desktop Client toolbar or by clicking File>New>New Supplier Catalog Item from the CSM Desktop Client menu bar.
- The OOTB system implements several Actions/One-Step Actions to make creating Supplier Catalog Items more efficient. For more information about Actions and One-Step Actions, refer to the Actions/One-Step Actions documentation.

  Note: A full list of One-Step Actions is beyond the scope of this document. Export a schema document from CSM Administrator (Create a Blueprint>Tools>Export Schema) to view a full list of One-Step Actions associated with a particular type of Business Object (ex: Major).

- Press **TAB** to move to the next field on the form.
- Secure Supplier Catalog Item records by controlling who can view, create, and edit records.

Supplier Management

Supplier management is the process that allows users to onboard and offboard multiple suppliers (internal and/or external) and manage their individual lifecycles, which includes defining information, creating agreements, and assessing performance.

About Suppliers

A supplier is a person or group (internal or external) that is responsible for providing a product or service to an organization based on an Operational Level Agreement (OLA) or Underpinning Contract (UC).

Supplier is a Major Business Object. The Supplier form allows users to view, create, track, and manage suppliers.

Note: Supplier can be used to support Multi-Sourcing Service Integration (MSI) and Service Integration and Management (SIAM). For more information, see The Relationship between CSM and Multi-Sourcing Service Integration and Service Integration and Management.

Supplier Good to Know

- A Supplier is a person or group (internal or external) that is responsible for providing a product or service to an organization based on an Operational Level Agreement (OLA) or Underpinning Contract (UC).
- Search for one or more Suppliers that meet a specific criteria by running a Quick Search or Search Group.
- Create a new Supplier by clicking New>New Supplier on the CSM Desktop Client toolbar or by clicking File>New>New Supplier from the CSM Desktop Client menu bar.
- The OOTB system implements several Actions/One-Step Actions to make creating Suppliers more efficient. For more information about Actions and One-Step Actions, refer to the Actions/One-Step Actions documentation.

Note: A full list of One-Step Actions is beyond the scope of this document. Export a schema document from CSM Administrator (Create a Blueprint>Tools>Export Schema) to view a full list of One-Step Actions associated with a particular type of Business Object (ex: Major).

- Press **TAB** to move to the next field on the form.
- Secure Supplier records by controlling who can view, create, and edit records.

Create a New Supplier

To create a new Supplier:

1. On the CSM Desktop Client or CSM Browser Client toolbar, click **New > New Supplier**. A new Supplier Form displays.

   The Supplier automatically enters the Evaluating phase of the workflow.

2. The Default Form will display the Supplier name, status, grade, risk level, and contact information once you have entered it. Assign a Supplier Manager by selecting the **-select owner-** link. Click the **Assign to Me** link in the Actions List to assign yourself as the owner of the Supplier record.
3. Record basic Supplier details, contact information, and add a company logo in the Overview tab in the Form Arrangement.
4. Provide Supplier Management information to determine how often the Supplier's performance should be reviewed and how often Risk Assessments should be conducted. The Supplier Category should be populated from the drop-down menu to denote what type of contract the Supplier has with the company. The Supplier Type can also be populated from the drop-down to denote if the Supplier is an Internal Supplier or an External Supplier.

   Note: The Supplier Category and Supplier Type drop-down menus can be configured based on User need. To add or remove field options, click **Tools > Table Management > Supplier Category**, or the desired menu name, and right-click a field to edit it. Click the **New** button in the toolbar to add a new field option to the drop-down.

   Note: The On Probation/Under Review checkbox is linked to an Automation Process; if the field is selected, then the system automatically notifies the Supplier Manager via e-mail that the Supplier needs to be reviewed.

5. The Form Arrangement contains tabs for quick reference of records related to the Supplier. There is no requirement regarding which tabs need to be populated or completed in order for the Supplier to move through the workflow.

   - The Agreements tab displays existing contracts the company has with the Supplier and the Work Units tab divides them into smaller units. The Tasks tab then shows what the Supplier needs to perform or provide in order to fulfill the Agreements and Work Units.
   - The Supplier Catalog Items tab displays the existing items the supplier is contracted for, including type of item and how it is used within the company.
   - Scorecard assessment dates and grades display in the Scorecard tab. The most recent grade displays in the Default Form. For details on completing the Supplier Scorecard, see Step 6.
   - Create a Supplier risk assessment by selecting the **Create Risk Assessment** link in the Actions List. Once you complete a risk assessment, it will appear in a Supplier Risk Assessment tab in the Form Arrangement. The date that the assessment was performed, the Supplier's total score, their total risk level, and the Manager that performed the assessment will display under this tab. For details on completing the Risk Assessment, see Step 7.

- Service Impact Events include anything that may impact the Supplier's ability to provide their specified service; these events can be manually inputted into the tab.
- Enter Service Complaints through the Service Complaints tab if necessary.
- The Configuration Items tab displays the Configuration Items that a Supplier's service supports.

6. Create a Supplier Scorecard.

   a. Click the **Create Scorecard** link in the Actions List.

   Note: The Scorecard assesses the Supplier's reliability and whether or not there are complaints within their control attached to their Form. Complaints associated with the Supplier display in the Service Complaints tab of the Form Arrangement.

   The Scorecard Form displays, showing how the Supplier has ranked in four categories, each with the same subcategories.

   A grade based on the Scorecard Form's calculations displays in the grade section of the Default Form.

   Note: The **Supplier Scorecard** uses an Automation Process that automatically sends an e-mail to the Supplier Manager if the resultant grade is lower than the previously attained grade. The Supplier Manager also receives an e-mail if the Supplier is given a failing grade by the Scorecard.

7. Complete the Supplier Risk Assessment.

   a. Select the **Create Risk Assessment** in the Actions List

   The Risk Assessment Questionnaire determines the Supplier's risk based on Service Delivery Risks and Service Disruption Risks. The Questionnaire should be filled out during the initial Evaluation stage, and again based on the Risk Assessment Cycle that should have been determined in the Supplier Management section of the main form.

   Note: The Risk Assessment form is the OOTB configuration but can be modified by the User to measure fields of their choice. The Questionnaire corresponds with the Risk subject. The Questionnaire asks questions regarding the subject that is currently selected, but the Questionnaire is the same for each subject. A Risk Mitigation Plan is required if the Risk is Moderate and Possible, or higher. The plan should be typed into the available text box. All Risk Assessments that are performed and the date of completion displays in the Risk Assessment tab in the Arrangement Pane.

   The Risk Assessment results display in the Supplier Risk Assessment tab of the Form Arrangement. "Low" Risk are green, "Medium" are orange, and "High" are red.

8. Once information has been completed by the Supplier Manager, the status of the Supplier can be moved to the next stage in the workflow, from Evaluating to Onboarding.

- Onboarding occurs when the Supplier is filling out Agreements with the company and establishing a service design.
- Once a Supplier has been approved and is acting as a service provider, the Supplier should be moved to the Active phase of the workflow.
- Offboarding may occur as a result of poor performance and serves as the phase a Supplier will be in if the company is currently attempting to sever ties. During this phase, a replacement Supplier should be chosen.
- The Inactive phase occurs when a Supplier is no longer being used and has fulfilled all existing Tasks or Agreements.

Work Item Task

Work Item is a Group Member of Task. Use the Work Item form to define and manage Tasks required to resolve Incidents, Problems, or Changes.

Create a new Work Item, assign ownership, and create dependencies from the Task tab in the Form Arrangement of these Business Objects.

Related concepts

Logging Incidents

Logging Problems

Change Workflow

Using Work Item Actions

There are several Actions associated with the Work Item form to assist with managing Tasks and assist with completion.

- **Take Ownership:** Select this link to assign the Task to yourself.
- **View Detailed Date/Time Information:** Select this link to view details such as the time and date that the Work Item was created, when it was last edited, and parent record details.
- **Add to My Outlook Calendar:** Select this link to add the Task due date to your Outlook calendar.
- **Add to a Downstream Task:** Select this link to open a new Task form. Doing so adds an additional dependancy to the parent record. The Downstream Task must be completed after the Work Item it was created from.
- **Link to an Upstream Task:** Select this link to select an Upstream Task to link the Work Item to. The Upstream Task must be completed prior to completing the current Work Item.
- **Visualize Task Dependency Flow:** Select this link to open a Visualization of all Tasks associated with the parent record in the order that they must be completed.
- **Decline this Task:** Select this link to decline the task. The status automatically moves to Closed, and the Close Code is automatically set to Declined.
- **Reassign this Task:** Select this link to reassign the task to another team or another user.

Create a New Work Item

In the CSM Desktop Client, create a new Work Item, assign a user owner, and provide a title and description for the Work Item.

To create a new Work Item:

1. From the CSM Desktop Client toolbar, select **New > New Incident**.

   Note: Choose from the following Records: Incident, Problem, or Change.

2. Complete the Incident form.
3. Select **New Work Item** from the **Task** tab in the form arrangement.
   A new Work Item form opens with a unique ID and status of *New*.
4. Assign a user owner.
5. Provide a **Title** for the Work Item.
6. Provide a **Description** of the Work Item task.
7. (Optional): Select the **Task is for a future date/time** checkbox to select a future date/time that the Work Item must be complete on.
8. (Optional): Select the **Track time spent** checkbox to require the owner to log time spent resolving the Work Item.
9. Click **Save**.
   An email is automatically sent to the Work Item owner, notifying the user that a Work Item has been assigned to them. Once the owner begins work on the Task, the status of the Work Item moves to either *Acknowledge* or *In Progress*. The parent record cannot be closed until all associated Tasks have been completed.

Complete a Work Item

After finishing a Task, complete the steps to move the Work Item to *Closed*.

To complete a Work Item:

1. Select a code from the **Close Code** drop-down list (example: Completed).
2. Provide **Completion Details**.
3. Select **Next: Close** in the Default form to move the Work Item to *Closed*.

Work Units

A Work Unit is a generic task that is required to fulfill a Service Request.

A Work Unit is a generic task that is required to fulfill a Service Request. Work Units are grouped together in one or more Service Catalog Templates and then converted into individual Tasks when a customer submits an order for a Service using the CSM Portal.

In CSM, Work Unit is a Major Business Object. The Work Unit form allows Users to view, create, track, and manage Work Units.

Note: Work Unit can be used to support Multi-Sourcing Service Integration (MSI) and Service Integration and Management (SIAM). For more information, see The Relationship between CSM and Multi-Sourcing Service Integration and Service Integration and Management.

About Work Units

Work Units are grouped together in one or more Service Catalog Templates and then converted into individual Tasks when a customer submits an order for a Service using the CSM Portal.

In CSM, Work Unit is a Major Business Object. The Work Unit form allows Users to view, create, track, and manage Work Units.

Note: Work Unit can be used to support Multi-Sourcing Service Integration (MSI) and Service Integration and Management (SIAM). For more information, see The Relationship between CSM and Multi-Sourcing Service Integration and Service Integration and Management.

Work Unit Good to Know

- A Work Unit is a generic task that is required to fulfill a Service Request. Work Units are grouped together in one or more Service Catalog Templates and then converted into individual Tasks when a Customer submits an order for a Service using the Customer Portal.
- Search for one or more Work Units that meet a specific criteria by running a Quick Search or Search Group.
- Create a new Work Unit by clicking New>New Work Unit on the CSM Desktop Client toolbar or by clicking File>New>New Work Unit from the CSM Desktop Client menu bar.
- The OOTB system implements several Actions/One-Step Actions to make creating Work Units more efficient. For more information about Actions and One-Step Actions, refer to the Actions/One-Step Actions documentation.

Note: A full list of One-Step Actions is beyond the scope of this document. Export a schema document from CSM Administrator (Create a Blueprint>Tools>Export Schema) to view a full list of One-Step Actions associated with a particular type of Business Object (ex: Major).

- Fields:
  - Press **TAB** to move to the next field on the form.
  - The Work Unit Description and Task Description (Displays on Task) fields are Rich Text fields. To format the text or embed an image, click the Zoom button.
  - The Name, Work Unit Description, and Task Description (Displays on Task) fields are required to save the record.
- Secure Work Unit records by controlling who can view, create, and edit records.

Creating Work Units

The following instructions are available to walk you through the steps to create a Work Unit using our OOTB workflow:

- Create a Work Unit: Typical step-by-step instructions for creating a Work Unit.

Note: CSM provides an OOTB Work Unit workflow with all of the features you need to successfully manage Work Units. You can use this workflow as-is, or tailor it to meet the needs of your organization.

Create a Work Unit

Create a Work Unit (WU) to use in a Service Request or Service Catalog Template (SCT).

To create a Work Unit:

1. On the CSM Desktop Client toolbar, select **New > New Work Unit**. See CSM Desktop Client toolbar.
   A new WU record is created with a unique ID and a status of New.
2. Complete the **Basic Information** section (the **Name**, **Work Unit Description**, and **Task Description** fields are required):
   a. Provide a name (example: Acquire a Laptop) and select a category (example: Order product). The category provides a way to organize the Work Unit.
   b. Provide a description for the Work Unit and for the Task (example: Order a generic laptop). The Task description (displays on Task) autopopulates based on the **Work Unit Description** field. Provide a different description for the Task, if necessary.
3. Select an team owner and user owner.

   Note: When the WU transforms into a Task, the Work Unit owner becomes the Task owner.

4. (Optional) Complete the **Catalog Information** section if you are using a Supplier Catalog Item:
   a. Select a Catalog Item (example: Generic Laptop). This field uses the Supplier Catalog Items table.
   After selecting the Catalog Item, the following fields autopopulate (if available): **Item Description**, **Max Time to Complete**, **Max Time Units**, **Estimated Cost**, and **Business Hours**. Item Description information (uses the Supplier Catalog Items table description) displays as read-only text so you cannot manually edit this field. You can provide different values for **Max Time to Complete**, **Max Time Units**, **Estimated Cost**, and **Business Hours**, if necessary. The Supplier Catalog Item and Agreement records display as abbreviated read-only forms in the form arrangement.
   b. (Optional) From the **Actions** list you can:
   - **Change Supplier**: Select the link to open the **Agreement Selector**, and select an alternate Supplier.

     The new Supplier information displays in the form area.

   - **Clear the Catalog Item**: Select the link to remove the data in the **Catalog Information** section and select a new Catalog Item under the **Catalog Information** section.
5. Select the **Next: Set to Active** link in the Default form to activate the WU.
   The status changes to Active and the Work Unit is available to use for Service Catalog Templates.

To retire the WU, select the **Next: Retire Work Unit** link in the Default form.

Work Unit Features

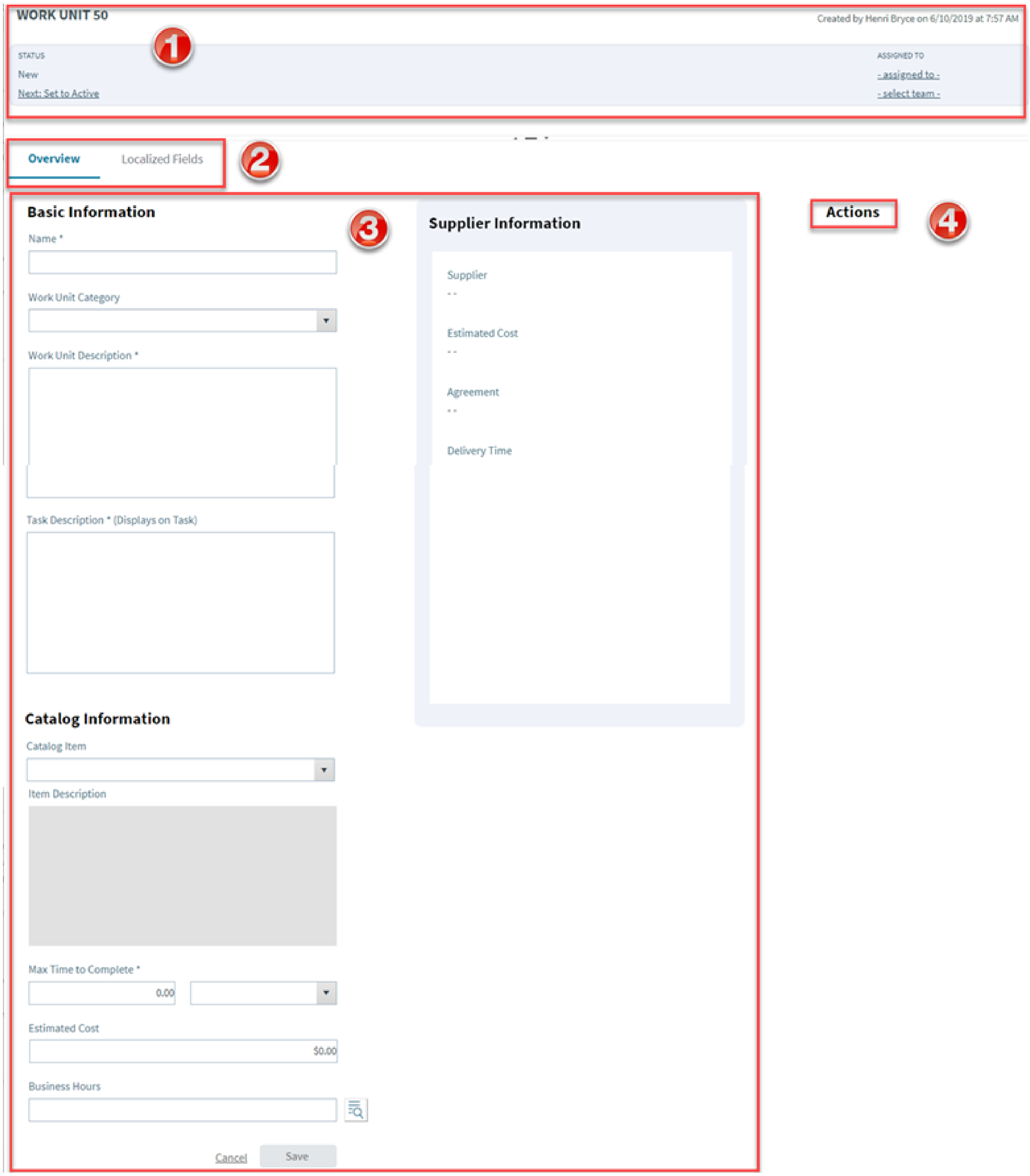
CSM provides the following tools to help manage Work Units:

- Form
- Saved Searches

Work Unit Form

CSM provides a read-only OOTB Work Unit form available in the CSM Desktop Client. The Form is comprised of three main areas:

1. Default Form: Displays important at-a-glance information, such as Work Unit ID, Status bar (current and next Status), and to whom the Work Unit is assigned.
2. Form Arrangement: Dynamically displays a tabbed collection of child Forms and records that are in a relationship with the Parent Work Unit form (example: Supplier Catalog Item, Agreement (OLA or UC), and Service Catalog Templates). See Managing Form Arrangements for more information.
3. Form Area: Displays the main form fields. Specifics forms appear when relevant.
4. Actions List: Dynamically displays a list of actions that are available for the current Work Unit.


WORK UNIT 50
Created by Henri Bryce on 6/10/2019 at 7:57 AM
STATUS
New
Next: Set to Active
ASSIGNED TO
- assigned to -
- select team -
Overview
Localized Fields
Basic Information
Name *
Work Unit Category
Work Unit Description *
Task Description * (Displays on Task)
Catalog Information
Catalog Item
Item Description
Max Time to Complete *
0.00
Estimated Cost
$0.00
Business Hours
Cancel
Save
Supplier Information
Supplier
Estimated Cost
Agreement
Delivery Time
Actions
1
2
3
4

Work Unit Saved Searches

CSM provides the following OOTB Work Unit Saved Searches:

Saved Search	Returns	Association	Executed From
All Work Units	All Work Units, regardless of status.	Work Unit	Search Manager, Widgets
New Work Units	Work Units with a status of New.	Work Unit	Search Manager
Retired Work Units	Work Units with a status of Retired.	Work Unit	Search Manager