



## CSM 9.5.0 Record Management

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# Record Management

CSM provides an Out-Of-The-Box (OOTB) 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](#).



**Note:** For detailed information on these features and processes, refer to the *CSM Starter Database Schema Guide*. The schema guide can be found on the [Customer Support Portal](#). On the toolbar, click Release Notes and select Cherwell Service Management. Select the version of CSM you are running to find the schema document you need. Also, note that CSM is highly configurable so your processes and content will vary, especially if your system utilizes integrations and Cherwell mergeable applications (mApp Solutions).



# About Records

A CSM record is a collection of Business Object data represented as a Form and Grid. Records are used to track and relay information. Examples include:

- Incident/Service Request
- Problem
- Change Request
- Service
- Knowledge Article

The following figure shows an example Incident Business Object (represented by a Form):

The screenshot displays the 'Incident 102028' form. The top navigation bar includes 'Record', 'Classify', 'Investigate', 'Resolve', and 'Close'. The 'Investigate' tab is active.

**Incident 102028**  
 Status: **Assigned** (Next: Begin Work)  
 Priority: **3**  
 Requestor: **Kyle Murphy** (Alternate Contact Info)  
 Owned By: **Clair Wu** (Assign To...)  
 SLA: **Desktop Management** (More Info...)  
 I Want To: [Take Ownership](#), [Escalate to Level 2](#), [View Detailed Date/Time Information](#), [Link to Existing Major Incident](#), [Submit to Knowledge Base](#), [Track Time](#)

**Step 1: Record the Details** (Last Edited 12/4/2015 10:43 AM by Henri Bryce)  
 Short Description: Keyboard not working.  
 Description: Keyboard is not working.  
 Call Source: Phone

**Step 2: Classify** (clear classifications)  
 Service: Desktop Management (View Related KB Articles)  
 Category: Computer  
 Subcategory: Submit Incident  
 Priority: 3 (Major Incident)  
 Impact: Individual  
 Urgency: High  
 Primary CI: frontdesk (View Impacted CI's)

**Step 3: Investigate the Incident**  
 Additional Details: Need to replace the keyboard.

**Journal History Table:**

Type	Created	By	Details
Journal - History	8/14/2015 12:52 PM	Andrew Simms	The value in the field Priority was set from the value 1 to the value 3 on 2/14/2014 by andrew.
Journal - History	8/14/2015 12:52 PM	Andrew Simms	The value in the field Urgency was set from the value Company to the value High on 2/14/2014 by andrew.
Journal - History	8/14/2015 12:52 PM	Andrew Simms	The value in the field Impact was set from the value High to the value Individual on 2/14/2014 by andrew.
Journal - History	8/13/2015 9:21 AM	Clair Wu	The value in the field Short Description was set from the value Test to the value Keyboard not working on 2/13/2014 by clair.
Journal - History	8/13/2015 9:20 AM	Clair Wu	The value in the field Short Description was set to the value Test on 2/13/2014 by clair.
Journal - History	7/29/2015 7:09 AM	Andrew Simms	The value in the field Priority was set from the value 3 to the value 1 on 1/29/2014 by andrew.
Journal - History	7/29/2015 7:09 AM	Andrew Simms	The value in the field Urgency was set from the value High to the value Company on 1/29/2014 by andrew.
Journal - History	7/29/2015 7:09 AM	Andrew Simms	The value in the field Impact was set from the value Individual to the value High on 1/29/2014 by andrew.

# Tour a Record

Although the data in each record is unique, the layout of most major records is similar. Generally, CSM records are made up of four main areas:

1. **Quick Info Tile:** Displays important at-a-glance information, such as ID, Status bar (current and next status), [record ownership](#), and common operations (I Want To).
2. **Workflow bar:** Displays the record's progress as it moves through its workflow phases.
3. **Main Pane:** Displays the main form fields. The Main panes greatly vary.
4. **Arrangement:** Dynamically displays linked child records, such as Journals, Tasks, Approvals, etc.

The screenshot shows the CSM 9.5.0 Record Management interface for Incident 102257. The interface is divided into four main areas, each highlighted with a red circle and a number:

- 1. Quick Info Tile:** Located on the left sidebar, it displays the incident ID (102257), status (New), priority, requestor information, ownership options, SLA (Corporate), and a list of 'I Want To' actions like 'Take Ownership' and 'Escalate to Level 2'.
- 2. Workflow bar:** Located at the top, it shows the current step in the workflow: 'Step 1: Record the Details', with buttons for 'Record', 'Classify', 'Resolve', and 'Close'.
- 3. Main Pane:** The central area containing the main form fields for 'Step 1: Record the Details' and 'Step 2: Classify'. It includes fields for Short Description, Description, Call Source, Service, Category, Subcategory, Priority, and Primary CI.
- 4. Arrangement:** The bottom area, which is currently empty, displaying the message 'There are currently no records'.

# Record Features and Capabilities

CSM Records have numerous features and capabilities:

## Incident and Service Request Management

- **Searching:** Quickly locate all Incidents by running a [Quick Search](#), or search for a particular Incident or set of Incidents by refining the search criteria to a word/phrase, timeframe, Customer, etc. Use [Search Group](#) to save/run commonly-run Searches.
- **Search Groups:** Use [Search Groups](#) to quickly locate/filter Incidents, or to automate searching in Reports or on Dashboards.
- **Security:** Secure Incidents by controlling who can view, create, edit, and delete records.
- **Business Object:** Use the dedicated Incident Business Object to track Incidents and Requests; configure the Business Object to capture/track only what you want.
- **Form:** Use the powerful [Incident and Request forms](#) to create, edit, and track Incidents. The forms provide a Quick Info Tile (left) to display important at-a-glance information (Incident ID, Status bar (current and next status), Priority bar (with threshold colors), requestor, [record owner](#), SLA respond/resolve target times, and common operations (I Want To), a color-coded workflow bar (top) to visually track the Incident/Request workflow phases, and an Arrangement area to dynamically display linked records (child records) that are in a relationship with the Incident/Request (parent record).
- **Specifics forms:** Use the context-sensitive [Specifics forms](#) to capture relevant data for the different Categorizations of Incidents and Requests.
- **Workflow:** Use the streamlined [Incident workflow](#) to move Incidents/Requests from New to Closed.
- **Creation Flexibility:** Create Incidents manually or through an automated process, or allow Customers to create their own records in the Portal.
- **Ownership:** Assign each Incident to a [record owner](#) to ensure accountability.
- **Linked Records:** Link child records to a parent Incident Record to keep supporting information at your fingertips and to ensure data relationships. Linked child records are visible in the Incident Arrangement.
- **Tasks:** Use linked Tasks (Work Items, Approvals) to distribute and track individual pieces of work assigned to Teams or Users.
- **Incident matching:** Take advantage of Incident Matching to determine if an Incident/Request has a known solution/workaround, is part of a larger Problem, is a duplicate, etc.
- **History and Revision tracking:** Use linked Journals to track important status and field changes.
- **E-mail correspondence tracking:** Use linked Journals to track e-mail correspondence (ex: Receipt, Follow-up, Resolved, and Closed).
- **Chat and Remote Session tracking:** Use linked Journals to track Chat and remote support conversations.
- **Queue tracking:** Use linked Journals to track when Queues are added to/removed from a [Queue](#).

- **SLA Management tracking:** Use linked Journals and linked SLM records to track SLA breaches, warnings, and changes in the Pending status for Stop The Clock.
- **First Call Resolution (FCR) tracking:** If an Incident is closed (manually or through an automated process) in three saves or fewer, an FCR icon appears on the form to congratulate you and track FCR. You can also manually mark the Incident as FCR on the linked Resolution Details form.
- **Stop The Clock:** If allowed, you can Stop The Clock (pause the SLA Clock and put the record into a Pending status) during the Investigate/Fulfill phase.
- **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 Incidents through their workflow, initiate common operations (ex: Assign ownership), initiate scenario-specific Actions, run Reports, etc. Actions/One-Step Actions are available on the Incident and Request forms (including from the [CSM Desktop Client Task Pane](#) and [CSM Desktop Client menu bar](#)), and on the Incident and Request Dashboards.
- **Dashboards:** Use the [Incident Dashboard](#), [Incident Details Dashboard](#), and the [Request Dashboard](#) to view your critical Incident/Request metrics in a single, real-time, at-a-glance control panel. The Dashboards display the number of Open/Reopened/Pending/Overdue Incidents and Requests, the number of open Incidents/Requests affecting VIP Customers, the average number of Incidents/Requests resolved in a month, the percentage of Incidents/Requests in each Status of the workflow (New, Assigned, In Progress, Pending, Resolved, Closed, and Reopened), and the number of Incidents/requests by Category.
- **Reports:** Run [Reports](#) to show up-to-date statistics on most common Incidents, User and Team workloads, closure rates, Service trends, potential SLA breaches, and much more.
- **Automation Processes:** Use [Automation Processes](#) to automatically close Incident and to send e-mails.

## Problem Management

- **Searching:** Quickly locate all Problems by running a [Quick Search](#), or search for a particular Problem or set of Problems by refining the search criteria to a word/phrase, timeframe, Customer, etc. Use [Search Groups](#) to save/run commonly run Searches.
- **Security:** [Secure](#) Problems by controlling who can view, create, and edit records.
- **Business Object:** Use the dedicated Problem Business Object to track Problems and configure the Business Object to capture/track only what you want.
- **Form:** Use the powerful [Problem Form](#) to create, edit, and track Problems. The form provides a Quick Info Tile to display important at-a-glance information (Problem ID, current and next status, [record ownership](#), common operations (I Want To), and SLA information), a workflow bar to visually track the Problem workflow phases, and a Form Arrangement area to dynamically display linked records (child records) that are in a relationship with the Problem (parent record).
- **Workflow:** Use the streamlined Problem workflow to move Problems from New to Closed.
- **Ownership:** Assign each Problem to a [record owner](#) to ensure accountability.
- **Tasks:** Use linked [Tasks](#) to distribute and track individual pieces of work assigned to Teams or Users (for example, Escalations, Time Entries, and Work Items).

- **Linked Records:** Link child records to a parent Problem record to keep supporting information at your fingertips and to ensure data relationships. Linked child records are visible in the Problem's Arrangement area.
- **History and Revision Tracking:** Use linked [Journals](#) to track important status and Field changes.
- **Queue Tracking:** Use linked [Journals](#) to track when Queues are added to or removed from a [Queue](#).
- **Actions/One-Step Actions:** Use powerful [Actions](#) and [One-Step Actions](#) to move Problems through their workflow, initiate common operations (for example, Assign ownership), initiate scenario-specific Actions, run Reports, etc. Actions/One-Step Actions are available on the Problem Form (including from the [CSM Desktop Client Task Pane](#) and [CSM Desktop Client menu bar](#)) and on the Problem Dashboard.
- **Problem Dashboard:** Use the [Problem Dashboard](#) to view your critical Problem metrics in a single, real-time, at-a-glance control panel. The Dashboard displays the number of open Problems, open Top Issues (in the Portal), total linked Incidents, Problems with no workaround, Problems with workarounds, and open known errors. It also shows a list of Top Issues, the number of Problems owned by each Team, the percentage of Problems in each status of the workflow, and the percentage of Problems by category.
- **Reports:** Run [Reports](#) to show up-to-date statistics on the most common Problems, User and Team workloads, closure rates, Service trends, potential SLA breaches, and much more.

## Change Management

- **Searching:** Quickly locate all Changes by running a [Quick Search](#), or search for a particular Change or set of Changes by refining the search criteria to a word/phrase, timeframe, Customer, etc. Use [Search Groups](#) to save and run commonly-run searches.
- **Search Groups:** Use [Change Search Groups](#) to quickly locate/filter Changes, or to automate searching in Reports or on Dashboards.
- **Security:** [Secure](#) Changes by controlling who can view, create, and edit records.
- **Business Object:** Use the dedicated Business Object to track Changes, and configure the Business Object to capture/track only what you want.
- **Form:** Use the powerful Change Request forms to create, edit, and track Changes. The forms provide a Quick Info Tile to display important at-a-glance information (Change ID, requestor contact information, current and next status, [record ownership](#), and common operations). A workflow bar allows you to visually track the Change workflow phases, and an Arrangement area dynamically displays linked records (child records) that are in a relationship with the Change (parent record).
- **Creation Flexibility:** Create Changes manually or through an automated process.
- **Ownership:** Assign each Change to a [record owner](#) to ensure accountability.
- **Linked Records:** Link child records to a parent Change Record to keep supporting information at your fingertips and to ensure data relationships. Linked child records are visible in the Change's Form Arrangement area.
- **Approval Process:** Use three OOTB Change Approval processes to automate and regulate approving/denying/abstaining Changes. The Change Approval processes contains automatic notifications and status tracking.

- **Approval Tracking:** Use linked Approvals to track who/when approved/denied/abstained a Change.
- **Tasks:** Use linked [Tasks](#) to distribute and track individual pieces of work assigned to Teams or Users (example: Escalations, Time Entries, and Work Items).
- **Customer Communication Tracking:** Use linked [Journals](#) to track e-mail correspondence.
- **History and Revision Tracking:** Use linked Journals to track (and audit) important Status and field changes.
- **Rich Text:** Use [Rich Text](#) to complement your description fields by adding fonts and images/screenshots.
- **Actions/One-Step Actions:** Use powerful Actions/One-Step Actions to move Changes through their workflow, initiate common operations (example: Assign ownership), initiate scenario-specific Actions, run Reports, etc. Actions/One-Step Actions are available on the Change forms (including from the [CSM Desktop Client Task Pane](#) and [CSM Desktop Client menu bar](#)), and on the Change Dashboards.
- **Change Dashboards:** Use the Change Dashboard to view your critical Change metrics in a single, real-time, configurable, at-a-glance control panel. The Dashboard displays Change data, such as the number of open Changes, the number linked to Incidents and Problems, the number of Changes in each status of the workflow (example: Classify, Assess, Implement, Review), and the number of Changes by category.
- **Reports:** Run [Reports](#) to show up-to-date statistics on Change breakdowns, trends, CI Change Request metrics, and more.
- **Automation Processes:** Use [Automation Processes](#) to automatically escalate Changes, send e-mails, etc.

## Release Management

- **Searching:** Quickly locate all Releases by running a [Quick Search](#), or search for a particular Release by refining the search criteria to a word/phrase, timeframe, Customer, etc. Use [Search Groups](#) to save/run commonly-run Searches.
- **Search Groups:** Use [Release Search Groups](#) to quickly locate/filter Releases, or to automate searching in Reports or on Dashboards.
- **Security:** [Secure](#) Releases by controlling who can view, create, and edit records.
- **Business Object:** Use the dedicated Release Business Object to track Releases; configure the Business Object to capture/track only what you want.
- **Form:** Use the powerful [Release Form](#) to create, edit, and track Releases. The form provides a Quick Info Tile to display important at-a-glance information (Release ID, current and next status, [Record Ownership](#), common operations (I Want To section), a workflow bar to visually track the [Release workflow](#) phases, and an Arrangement area to dynamically display linked records (child records) that are in a relationship with the Release (parent record).
- **Workflow:** Use the streamlined [Release workflow](#) to move Releases from Plan to Review.
- **Creation Flexibility:** Create Releases manually or through an automated process.
- **Tasks:** Use linked Tasks to distribute and track individual pieces of work assigned to Teams or Users.

- **Linked Records:** Link child records to a parent Release Record to keep supporting information at your fingertips and to ensure data relationships. Linked child records are visible in the Release's Arrangement area.
- **History and Revision Tracking:** Use linked Journals to track important Status and field changes.
- **Ownership:** Assign each Release to a [record owner](#) to ensure accountability.
- **Approval Process:** Use the defined Release Approval processes to automate and regulate approving/denying/abstaining Releases. The Release Approval process contains automatic notifications and status tracking.
- **Tasks:** Use linked Tasks/Milestones to distribute and track individual pieces of work assigned to Teams or Users (for example, Escalations, Time Entries, and Work Items).
- **Customer Communication Tracking:** Use linked [Journals](#) to track e-mail correspondence (ex: Receipt, Follow-up, Resolved, and Closed).
- **History and Revision Tracking:** Use linked Journals to track important status and field changes.
- **Queue Tracking:** Use linked Journals to track when records are added to/removed from a [Queue](#).
- **Actions/One-Step Actions:** Use powerful [Actions](#) and [One-Step Actions](#) to move Releases through their workflow, initiate common operations (ex: Assign Ownership), initiate scenario-specific Actions, run Reports, etc. Actions/One-Step Actions are available on the Release Form (ex: [CSM Desktop Client Task Pane](#)).
- **Automation Processes:** Use [Automation Processes](#) to automatically send notification e-mails.

# Incident/Service Request Management

Incident/Service Request management is the process that ensures that Services are restored as quickly as possible, whether that means:

- Incident: Restoring something that is broken/disrupted. Examples include fixing a printer, phone, or software.
- Service Request: Fulfilling a request for information/advice or access a Service. Examples include 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 OOTB [Specifics Forms](#), which are automatically displayed when you categorize the record.

## Incident Good to Know

- Incident and Requests are stored together in the Incident Business Object. The Categorization (Service/Category/Subcategory) identifies the Incident Type as Incident or Request. The workflow for Incidents and Requests is almost identical and the forms are very similar. [Specifics forms](#) always vary.
- First Call Resolution (FCR) is defined as three or fewer saves. If an Incident is closed (manually or through an automated process) in three saves or fewer, an FCR icon appears on the form to congratulate you. You can also manually mark the Incident as FCR on the Resolution Details Form.
- If allowed, you can Stop The Clock (pause the SLA Clock and put the record into a Pending status).
- CSM provides several OOTB Automation Processes to automate Incident management. For more information, refer to the [Automation Process](#) documentation.
- If enabled (via an Automation Process), a Customer Survey e-mail is automatically created/sent to the Customer to notify her that her Incident was closed and to solicit feedback ("Send Survey" Automation Process). To avoid too many e-mails being sent, CSM sends only one survey to each Customer every 90 days and does not send surveys for Password Requests.
- 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 Customer's **e-mail address** in the Requestor section of the Quick Info Tile. If sent using the File menu, the e-mail is blank. If sent using the Quick Info Tile, an e-mail template is used to autopopulate the e-mail with information from the current Incident (example: Incident ID, Customer's name, logging date/time details, etc.).

# Logging Incidents

The following instructions are available to walk you through the steps to log a new Incident using our OOTB [workflow](#):

- [Log an Incident](#): Typical step-by-step instructions for logging an Incident.
- [Log an Incident - Detailed](#): Detailed step-by-step instructions for logging an Incident, including tips, optional steps, and behind-the-scenes information.



**Note:** CSM provides an [OOTB Incident workflow](#) with all the features you need to successfully manage Incidents. You can use this workflow as-is, or tailor it to meet the needs of your organization.

# Log an Incident

The following procedures walk you through the steps required to log an Incident. A Request follows a similar workflow.

## Log an Incident

Create a new Incident Record and provide initial details.

1. On the CSM Desktop Client toolbar, click **New > New Incident**.
2. Record Incident details:
  - a. Requestor: Provide the **name** of the Customer who initiated the contact in the Quick Info Tile, and then press **ENTER** or **TAB** to search for the Customer Record.
  - b. Short Description: Provide a **concise description** of the Incident.
  - c. Description: Provide a **detailed description** for the Incident.
  - d. Call Source: Select a **source** for the initiation.

When the Incident is saved, an e-mail is sent to the Customer to confirm receipt and relay the Incident number. If the Incident is resolved before the first save, a Resolve e-mail is sent instead. Journal records are automatically created to track e-mail communication. View e-mails in the Incident Journals tab of the Form Arrangement.

## Classify an 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: Select the affected **Service** from the drop-down.
2. Category: Select the affected Service **category** from the drop-down.
3. Subcategory: Select the affected servicesubcategory from the drop-down.



**Note:** Incident Type, related [Specifics Form](#), and SLA's are determined by the Category selections.

4. Prioritize the Incident:
  - a. Click the **Priority** drop-down and select a **priority number** from the Priority Matrix. The selected priority populates the Quick Info Tile.
  - b. (Optional): If a priority of 1 is selected, the **Major Incident** checkbox becomes available. To escalate the Incident to a Major Incident, it must have a Priority 1 status as well as similar linked Incidents. Attach similar Incidents in the Similar Incidents tab of the Form Arrangement. This tab is only visible if the Major Incident checkbox has been selected.
  - c. (Optional): Select the **Link to Existing Major Incident** link in the I Want To section of the Quick Info Tile if the Incident is a contributing factor to an already open and existing Major Incident.

- d. 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 Quick Info Tile.
- e. Select an affected CI: Click the **CI Selector** button  to launch the CMDB window, and then select a **CI**. The selected CI record appears in the Configuration Items tab of the Form Arrangement.

## Investigate the Incident

Assign an owner to move the Incident through the workflow.

1. Assign an Owner to the Incident by clicking an ownership link in the Quick Info Tile. Ownership is automatically assigned to the creator when the Incident is saved or escalated, but can be changed if necessary.
2. The Owner completes any associated [Specifics Form](#). These vary and are determined during Categorization.

## 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](#).
  - View Similar Incidents.
  - Escalate the issue to a higher tier of support.
  - Use Actions (Actions/One-Step Actions/Quick Templates).
2. After a resolution has been reached, click the **Resolve** link in the Status bar. CSM automatically prompts you to log the resolution/fulfillment details and select a Cause Code. Then, a Resolution Details Record is created and appears in the Resolution Details tab of the Form Arrangement. A Resolve notification e-mail is also sent to the Customer.

# Log an Incident - Detailed

The following procedures walk you through the steps required to log an Incident, as well as how to classify it as a Major Incident. A Request follows a similar workflow.

## Log an Incident

Create a new Incident Record and provide initial details.

1. On the [CSM Desktop Client toolbar](#), click **New > New Incident**.






**Note:** If configured, an Incident can also be logged by an automated process or by a Customer in the Portal. After an Incident is logged, a CSM Creator or Technician moves the Incident through the [Incident workflow](#).

2. Record Incident details:
  - a. Requestor (in the Quick Info Tile): Provide the **name** of the Customer who initiated the Incident (example: Max), and then press **ENTER** or **TAB** to search for the Customer Record.

**Tip:** Wildcards (example: % or \*) can be used when searching. If the Customer is a



VIP, a VIP icon  appears beside the name. To browse for a Customer or add a new Customer Record, click the **Customer Selector** button  to launch the Contact Manager. To add an alternate phone number or e-mail address, click the **Alternate Contact Info** link. To view the selected Requestor's detailed Customer Record, click the **Quick View** button .

If an exact match is found, the Requestor fields are auto-populated with the Customer's information. If multiple matches are found (example: multiple Customers named Max), the Contact Manager opens so that you can select the appropriate Customer.

- b. Short Description: Provide a **concise description** for the Incident (example: Network printer issue).
- 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, click the **Zoom** button.
- d. Call Source: Select a **source** or method of contact from the drop-down.

## Classify an 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: Select the affected **Service** from the drop-down (example: Printing).
2. Category: Select the affected Service **Category** from the drop-down (example: Network).
3. Subcategory: Select the affected Service **Subcategory** from the drop-down (example: Submit Incident).



**Note:** Incident Type is determined by the Service, Category, and Subcategory selections. This three-tiered Categorization determines the Incident Type (Incident or Request), which [Specifics form](#) to display and which SLA to invoke. If you do not know the three-tiered classification, enter a **word** into the Quick Classify 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.

If it is determined that the Incident is a duplicate, use the Close as Duplicate One-Step Action (Incident Actions>Quick Templates) to quickly close the Incident Record, capturing the ReclID of the Incident that it duplicates.

4. Prioritize the Incident:

- a. Click the **Priority** drop-down and select a **priority number** from the Priority Matrix. The selected priority populates the Quick Info Tile.


The priority is displayed in the Priority bar of the Quick Info Tile. The color (red/orange/green) indicates the level of priority.


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 Quick Info Tile. The SLA icon indicates the SLA Type (example: Corporate, Customer, Config Item, or Service). The Respond/Resolve By icons indicate when the Target Times (deadlines) are met and breached. If enabled (via an Automation Process), e-mails 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 clicking the Set to Pending link in the I Want To section. 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, click the **Remove from Pending Status** link in the Status bar.

5. Select a Primary CI:

- a. 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. The selected CI record appears on the Configuration Items tab (Arrangement area).

**Tips:** To view the selected CI record, click the **Quick View** button  or click the **record** on the Configuration Items tab (Arrangement area). To view impacted CIs, click the Visualization

button  to open a Configuration Map that shows other CIs affected by the Incident.

6. (Optional): Escalate the Incident to the second-level Team.

- a. Click the **Escalate to Level 2** link in the I Want To section of the Quick Info Tile. You can also click the Escalation to Level 2 and 3 Action in the Incident Actions section of the Task Pane. A window opens prompting you to define a reason for escalating the Incident.

- b. Provide the **reason** for escalating the Incident.
- c. Click **OK**.  
A Work Item form opens in the Form Arrangement.



**Note:** The Title, Type, Description, and Owned By Team fields are auto-populated based on the Incident Subcategory form.

- d. Complete the Work Item form to assign a Task to a second-level Team.
7. (Optional): Escalate the Incident to the third-level Team.
- a. Click the **Escalate to Level 3** button in the Incident Actions section of the Quick Info Tile. You can also click the Escalation to Level 2 and 3 Action in the Incident Actions section of the Task Pane.  
A window opens prompting you to define a reason for escalating the Incident.
  - b. Type the **reason** for escalating the Incident.
  - c. Click **OK**.  
A Work Item form opens in the Form Arrangement.
  - d. Complete the Work Item form to assign the Incident to a third-level Team.

## 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, complete the following procedures:

1. (Optional): Select the **Major Incident** checkbox. If a priority of 1 is selected, the **Major Incident** checkbox is automatically enabled. To escalate the Incident to a Major Incident, it must have a Priority 1 status as well as similar, linked Incidents.
2. (Optional): Attach similar incidents in the **Similar Incidents tab** of the Form Arrangement. This tab is only visible if the Major Incident checkbox has been selected. Any Incidents linked to a Major Incident can be automatically resolved at the same time as the Major Incident.



**Tip:** 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.

3. (Optional): Select the **Link to Existing Major Incident** link in the I Want To section of the Quick Info Tile if the Incident is a contributing factor to an already open and existing Major Incident.

## Assign Ownership to an Incident

Assign an owner to move the Incident through the workflow:



1. To assign an owner, choose one of the following methods:
  - Take Ownership: Click this **link** to make yourself the User owner .
  - Assign to: Click this **link** to select a User owner . The Team owner is populated by the User owner's default Team.
  - Select Owner (User): Click this **link** to first select a Team and then a User owner (User is limited by Team).
  - Select Team: Incidents are assigned to the 1st Level Support Team by default. Click this **link** to select a new Team owner, if necessary.  
CSM automatically sends an e-mail to the owners to notify them of ownership.
2. The Owner completes any associated [Specifics Form](#). These vary and are determined during Categorization.

## 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](#).
  - View Similar Incidents.
  - 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, click **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.

An e-mail is created and sent to the Customer to notify him that his Incident was resolved. If you discover that the Incident/Request is not ready to be resolved, reopen the Incident/Request by clicking the **Reopen Incident** link in the Status bar of the Quick Info Tile. If reopened, the Status changes to Reopened and the Incident can be investigated/fulfilled again.

3. (Optional) Transfer the resolution to the Knowledge Base/Support Group:
  - a. Click the **Submit to KB** button on the Resolution Details form or the **Submit to Knowledge Base link** in I Want To section of the Quick Info Tile to [log a KA](#).
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>Close Current Incident.

# Incident Design Ideas

CSM provides an OOTB [Incident workflow](#) with all the [features](#) you need to successfully log/resolve Incidents and log/fulfill Requests. 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, which Fields support Rich Text, etc.
- **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 (ex: "Notify Owned By of Edits" One-Step Action).
- **E-mail:** Change the templates that are used to create the e-mails sent by One-Step Actions or Automation Processes (ex: Resolved Confirmation). 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 (ex: Monitors for SLA resolve/respond by deadline breaches, automatic notification e-mails, etc.) 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 (ex: Cause Codes).



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

# Incident Features

CSM provides the following tools to help manage Incidents and Requests:



- Forms ([Incident/Request](#) and [Specifics Forms](#))
- [Tasks](#)
- Journals
- [Dashboards](#)
- [One-Step Actions](#)
- [Search Groups](#)
- [Automation Processes](#)
- [Reports](#)

# Incident Form

Use the Incident and Request forms to create, edit, and track Incidents/Requests. The forms are similar and are made up of three main areas:

1. Quick Info Tile: Displays important at-a-glance information, such as Incident ID, requestor contact information, Status bar (current and next Status), [record ownership](#), SLA information, and common operations (I Want To).
2. Main Pane: Displays the main form fields, organized by Record, Classify, and Investigate/Fulfill steps. [Specifics forms](#) appear when relevant.
3. Arrangement: Dynamically displays linked records (child records) that are in a relationship with the Parent Incident Record.

The following table describes the fields on the form.

Field	Description	Comments
Quick Info Tile	Important at-a-glance information, such as Incident ID, requestor contact information, Status bar (current and next status), <a href="#">record ownership</a> , common operations (I Want To area.), and SLA information).	
Incident/Request	Record Type.	CSM automatically assigns the Record Type based on the type of record created (New>Incident) and its classification.
ID	Unique record identifier (ex: 10999).	CSM automatically assigns the ID when the Incident/Request is created.
Requestor	Person who initiated the Incident/Request.	
*Requestor Name	<p>Name of the Customer who initiated the Incident/Request.</p> <p>Provide a <b>name</b> in the Requestor field (ex: Max), and then press <b>&lt;Enter&gt;</b> or <b>&lt;Tab&gt;</b> to locate the Customer record.</p> <p><b>Note:</b> 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 Max), the Contact Manager opens so that the technician can select the appropriate one.</p> <p>Manually launch the Contact Manager by clicking the <b>Contact Manager</b> button .</p> <p>View the Customer's Contact record by clicking the <b>Go To</b> button .</p>	<p>*Required</p> <p>After you select a Customer, the Photo, Phone, and E-mail fields are autopopulated with information from the Customer record.</p> <p>If the Customer is a VIP, a VIP icon appears in the Requestor area to notify you of his importance.</p>



Field	Description	Comments
Alt. Contact Info	Alternate phone number or e-mail address of the Customer who initiated the Incident/Request.	
Avatar	Avatar (photo or image) of the Customer who initiated the Incident/Request.	<p>The Avatar, Phone, and E-mail fields are autopopulated with information from the Requestor's Customer Record.</p> <p>One-Step Action (Dial Customer Phone): Dials the Customer's phone number.</p> <p>One-Step Action (Follow-up E-mail): Creates a follow-up e-mail to send the Customer regarding a question or update about the Incident. Allows the User to edit the e-mail before clicking Send. Attaches the e-mail to the Incident History record.</p>
E-mail	<p>E-mail address of the Customer who initiated the Incident/Request.</p> <p>Click the <b>link</b> to create an e-mail addressed to the Customer (if e-mail is configured).</p>	
Phone	<p>Phone number of the Customer who initiated the Incident/Request.</p> <p>Click the <b>link</b> to dial the Customer (if telephony is configured).</p>	
Status Bar	Current and next status of the Incident as it progresses through the <a href="#">Incident workflow</a> .	

Field	Description	Comments
Status	<p>Statuses include:</p> <ul style="list-style-type: none"> <li>• <b>New:</b> Incident/Request was created and initial details are being entered.</li> <li>• <b>Assigned:</b> Incident/Request has been assigned to a record owner.</li> <li>• <b>In Progress:</b> Incident/Request is being investigated/fulfilled by a record owner and/or Task owners.</li> <li>• <b>Pending:</b> Incident/Request is temporarily paused (Stop The Clock).</li> <li>• <b>Resolved:</b> Incident/Request has been investigated/fulfilled and is waiting to be closed.</li> <li>• <b>Closed:</b> Incident/Request is closed.</li> <li>• <b>Reopened:</b> Incident/Request is reopened because the issue was not fixed or reoccurred.</li> </ul>	
Next: Status	<p>Click the <b>links</b> to move the Incident/Request through the Incident/Request workflow. Actions include:</p>	<p>One-Step Actions (Alt 1 Step from Relationship, Alt 2 Step from Relationship, or Next Step from Relationship):</p> <p>Conditionally changes the record status to next logical status (defined by the status values in Table Management).</p>
	<ul style="list-style-type: none"> <li>• <b>Begin Work:</b> Captures a date-time stamp to track when work began on the Incident/ Request.</li> </ul>	<p>One-Step Action (Start Work In Progress): 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.</p>
	<ul style="list-style-type: none"> <li>• <b>Set Pending:</b> Temporarily pauses the Incident/ Request (Stops the SLA Clock).</li> </ul>	<p>One-Step Action (Set Pending): Changes Incident Status from In Progress or Reopened to Pending in order 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.</p>
	<ul style="list-style-type: none"> <li>• <b>Resolve:</b> Prompts the User to log the Resolution details (Close Description) and Cause Code.</li> </ul>	<p>One-Step Action (Resolve Incident): 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. Pops up a message if the Incident Record has open Tasks associated with it that need to be closed before the Incident is Resolved.</p>

Field	Description	Comments
	<ul style="list-style-type: none"> <li>• <b>Close:</b> Manually closes the Incident/Request. <b>Note:</b> A CSM Automation Process/One-Step Action automatically closes Incidents after three (3) days.</li> </ul>	One-Step Action (Close Incident): Changes the Incident Status from Resolved to Closed. Prompts the User to fill in Resolution Notes and Cause Code if those fields are empty.
	<ul style="list-style-type: none"> <li>• <b>Reopen:</b> Reopens a Resolved Incident/Request because it was technically not resolved. Restarts the SLA Clock.</li> </ul>	One-Step Action (Reopen Incident): 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.
<b>Owned By</b>	Record owner.	
User Owner -select owner-	<p>Name of the User owner. Click the <b>link</b> to first select a Team and then a User owner (User is limited by Team).</p> <p>Typically, the owner is the Reviewer and a member of the Support Team.</p>	<p>One-Step Action (Assign to Individual):</p> <p>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.</p>
Team Owner -select team-	Name of the Team owner. Click the <b>link</b> to select a Team owner.	<p>One-Step Action (Assign to Team):</p> <p>Launches the Choose Team window, where a User can choose an Owned By Team for the record.</p>
Assign to	Click the <b>link</b> to select a User owner for the Incident. The Team owner is populated by the selected User owner's OOTB 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.
Avatar	Photo/graphic associated with the User owner (from User Profile).	
Owner E-mail Address	Owner's e-mail address (from User Profile).	
Owner Phone Number	Owner's phone number (from User Profile).	
<b>I Want To</b>	Common operations (initiate Actions/One-Step Actions).	
Take Ownership	Click the <b>link</b> to make yourself (Current User) the User owner for the Incident.	<p>One-Step Action (Take Ownership):</p> <p>Makes the Current User the Primary User of the record.</p>
View detailed date/time information	Click the <b>link</b> to open the Information window, where you can view current status, created date and time, creator name, and last edited date and time. Time Date/time format is MM/DD/YYYY HH:MM.	One-Step Action (Date Time Stamps Popup): Displays details for all the date/timestamps to give a historical view.

Field	Description	Comments
Submit to Knowledge Base	Click the <b>link</b> to create a new Knowledge Article (KA) that uses the Description, Categorization, and solution/workaround from the Incident/Request. A KA is a separate record with its own workflow.	One-Step Action (Nominate for KB): Creates a new Knowledge Article (KA) populated with the Description, Categorization, and Solution/Workaround from the Incident.
<b>Main Pane</b>		
<b>Step 1: Record the Details</b>	Record the basic details.	
Last Edited by...	Date, time, and user name information is recorded the first time the form is saved, and each time the form is modified.	
*Requestor	Select a Requestor/Initiator (see above).	*Required
*Short Description	A concise description of the Incident/Request..	*Required
*Description	Description of the Incident/Request.	*Required. Full-Text field (searchable).
Call Source	Detection source for the Incident/Request: <ul style="list-style-type: none"> <li>• Walk In</li> <li>• Social Media</li> <li>• E-mail</li> <li>• Event</li> <li>• Phone</li> <li>• Portal</li> </ul>	
<b>Step 2: Classification</b>	Classify the issue.	Classifies the record (Categorization (Incident or Request), Priority, Major Incident, and CI). Determines the Specifics Screen for capturing the appropriate details (Specifics forms).



Field	Description	Comments
Service	<p>Service affected by Incident/Request:</p> <ul style="list-style-type: none"> <li>• Account Management</li> <li>• Conferencing/Presentation</li> <li>• Desktop Management</li> <li>• E-mail/Calendar</li> <li>• Employee Support</li> <li>• Enterprise Apps</li> <li>• IT Service Desk</li> <li>• Network Services</li> <li>• Printing</li> <li>• Telephony/Fax</li> <li>• Web Services</li> </ul>	<p>You can classify an Incident from top down by first selecting a Service, then a Category, and then a Subcategory, or you can select the three-tier combination at once by clicking the <b>Incident Subcategory Selector</b> button . Click <b>Clear Classification</b> to Clear the Categorization fields.</p> <p><b>Note:</b> The Knowledge Button  is visible next to the Service field when you select a Service in the drop-down. Click the button to search the Service title (ex: Printing) in the Knowledge Base and view Search Results in the Knowledge Pane.</p> <p>For more information, see <a href="#">Service Categorization</a>.</p>
Category	Service Category that the record relates to (ex: Mobile Client).	
Subcategory	Service Subcategory that the KA relates to (ex: Submit Incident).	
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 <a href="#">Priority</a> .
Major Incident	When selected, indicates that the Incident/Request is considered a Major Incident (ex: a Priority 1 Incident/Request that requires a coordinated effort).	
Primary CI	CI affected by the Incident/Request, if any.	
<b>Step 3: Investigate</b>		
Specifics forms	Specifics forms vary.	For more information, see <a href="#">Specifics forms</a> .
<b>Arrangement</b>	Dynamically displays child records that are in a relationship with the Incident.	
Resolution Details	Displays related Resolution Detail records that are created to track the Resolution Details and possibly the Cause Code (if it is an Incident).	
Journals	Displays related Journal records that are created to track User notes/comments, Customer requests/comments, field and Status changes, SLM history, Queue history, and e-mail correspondence.	For more information, see <a href="#">Incident Journals</a> .
Tasks	Displays related Tasks.	For more information, see <a href="#">Incident Tasks</a> .

Field	Description	Comments
Similar Incidents	Displays similar Incidents (if applicable) that are found through Incident Matching to determine if the Incident/Request has a known solution/workaround, is part of a larger Problem, is a duplicate, etc.	
Configuration Items	Displays CIs that are related to/support this Incident (ex: Primary CI).	For more information, see <a href="#">About CMDB</a> .
SLM History	Displays related SLA/SLM records (SLA breaches, warnings, and changes in the Pending status for Stop The Clock ).	
Change Request	Displays Change Requests that involve this Incident.	For more information, see <a href="#">About Change Requests</a> .
Problem	Displays Problems that involve this Incident.	For more information, see <a href="#">About Problems</a> .

## 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 Mobile Phone 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 OOTB Specifics forms for each Service:

# Standard Details Specifics Form

The Standard Details Specifics form is invoked when a Service is categorized as:

Service	Category	Subcategory
Account Management	<Any>	<Any>
IT Service Desk	<Any>	<Any>
Enterprise Apps	<Any>	<Any>
Many other Subcategories use the Standard Details Specifics form; they are noted in later tables.		

# Conferencing/Presentation Specifics Forms

The Conferencing/Presentation Specifics form is invoked when a Service is categorized as:

Service	Category	Subcategory	Specifics Form
Conferencing/Presentation	<Any>	<Any>	Presentation

# Desktop Management Specifics Forms

The Desktop Management Specifics form is invoked when a Service is categorized as:

Service	Category	Subcategory	Specifics Form
Desktop Management	Computer	Request New Computer	New Device
All other Categories/Subcategories invoke the Standard Details Specifics form.			

## E-mail/Calendaring Specifics Forms

The E-mail/Calendaring Specifics forms are invoked when a Service is categorized as:

Service	Category	Subcategory	Specifics Form
E-mail/Calendaring	Browser Client	Request Access/Installation	Website Address
E-mail/Calendaring	Browser Client	Submit Incident	Connectivity
E-mail/Calendaring	Desktop Client	Request Access/Installation	Standard Details
E-mail/Calendaring	Desktop Client	Submit Incident	Connectivity
E-mail/Calendaring	Mailbox	Request Disk Quota Increase	Request Disk Quota Increase
E-mail/Calendaring	Mailbox	Request Mailbox or Alias	Request Mailbox or Alias
E-mail/Calendaring	Mailbox	Spam Filter Request	Spam Filter Request
E-mail/Calendaring	Mobile Client	Request Access/Installation	Standard Details
E-mail/Calendaring	Mobile Client	Submit Incident	Connectivity

# Employee Support Specifics Forms

The Employee Support Specifics forms are invoked when a Service is categorized as:

<b>Service</b>	<b>Category</b>	<b>Subcategory</b>	<b>Specifics Form</b>
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



## Network Services Specifics Forms

The Network Services Specifics forms are invoked when a Service is categorized as:

Service	Category	Subcategory	Specifics Form
Network Services	Backup/Restore	Request Full Restore of backup	Backup/Restore
Network Services	Backup/Restore	Request new backup job	Backup/Restore
Network Services	Backup/Restore	Request restore of files	Backup/restore
Network Services	Fileserver	Request File Share	Request File Share
Network Services	Fileserver	Request increase in disk quota	Request Increase in Disk Quota
Network Services	Physical Wires	Request New Wiring	Request New Wiring
Network Services	Physical Wires	Request Relocation of Wiring	Request Relocation of Wiring
Network Services	Physical Wires	Submit Incident	Standard Details
Network Services	Wireless	Request Access	Request Access
Network Services	Wireless	Submit Incident	Standard Details

# Printing Specifics Forms

The Printing Specifics forms are invoked when a Service is categorized as:

Service	Category	Subcategory	Specifics Form
Printing	Desktop	Request desktop printer	Printer Order
Printing	Desktop	Request Toner/Ink	Toner Order
Printing	Desktop	Submit Incident	Print Incident
Printing	Network	Request access to network printer	Request Access to Network Printer
Printing	Network	Request new Network Printer	Printer Order
Printing	Network	Request Toner/Ink	Toner Order
Printing	Network	Submit Incident	Print Incident

## Telephony/Fax Specifics Forms

The Telephony/Fax Specifics forms are invoked when a Service is categorized as:

Service	Category	Subcategory	Specifics Form
Telephony/Fax	Call Center Telephony	Move/Add/Change User or Queue	Standard Details
Telephony/Fax	Call Center Telephony	Request ACD/IVR Change	Standard Details
Telephony/Fax	Call Center Telephony	Submit Incident	Phone/Fax Incident
Telephony/Fax	Desktop Telephone	Request Telephone	Standard Details
Telephony/Fax	Desktop Telephone	Submit Incident	Phone/Fax Incident
Telephony/Fax	Fax	Request Fax Hardware	Standard Details
Telephony/Fax	Fax	Request Fax Software	Standard Details
Telephony/Fax	Fax	Request Toner/Ink	Standard Details
Telephony/Fax	Fax	Submit Incident	Phone/Fax Incident
Telephony/Fax	Mobile Telephone	Request Telephone	Standard Details
Telephony/Fax	Mobile Telephone	Submit Incident	Phone/Fax Incident

## Web Services Specifics Forms

The Web Services Specifics forms are invoked when a Service is categorized as:

Service	Category	Subcategory	Specifics Form
Web Service	Internet	Request new page or Site	Request New Page or Site
Web Service	Internet	Request update to page or Site	Request New Page or Site
Web Service	Internet	Submit Incident	Standard Details
Web Service	Intranet	Request new page or Site	Request New Page or Site
Web Service	Intranet	Request update to page or Site	Request New Page or Site
Web Service	Intranet	Submit Incident	Standard Details

## 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.

## Configure Dynamic Specifics Forms

Complete the following procedure to configure Dynamic Specifics Forms. Configuration procedures are completed in the CSM Desktop Client.

# Define Accessories and Permissions for a Computer CI

Use Table Management in the CSM Desktop Client to define accessories for a Computer CI.

## To define accessories for a Computer CI:

1. In the [CSM Desktop Client menu bar](#), click **Tools>Table Management**.

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 click 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. Click the **Include Specific Departments** link.
- b. Do one of the following to grant permissions to access the item in the drop-down on the Specifics Form:
  - Click the **add from list** link to grant permissions to all members of a specific department.
  - Click the **add all departments** link to grant permissions all members of all company departments.



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

6. Click **Save**.

# Define Accessories and Permissions for a Mobile Device CI

Use Table Management in the CSM Desktop Client to define accessories for a Mobile Device CI.

## To define accessories for a Mobile Device CI:

1. In the [CSM Desktop Client menu bar](#), click **Tools>Table Management**.

The Table Management interface opens.

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

Product Catalog items open in the Grid.

3. Select a **Mobile Device item** (example: Apple iPhone 5 32GB), and then click 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 on the Specifics Form:
  - a. Click the **Include Specific Departments** link.
  - b. Do one of the following to grant permissions to access the item in the drop-down on the Specifics Form:
    - Click the **add from list** link to grant permissions to all members of a specific department.
    - Click the **add all departments** link to grant permissions all members of all company departments.



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

6. Click **Save**.



# Using Dynamic Specifics Forms

When working with Dynamic Specifics Forms, Users can:

# Add Accessories to a Computer CI and Mobile Device CI

Use the [Incident Form](#) in the [CSM Desktop Client](#) to add accessories to a Computer CI and Mobile Device CI.

## 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: Select **Employee Support**.
  - b. Category: Select **Add/Change**.
  - c. Subcategory: Select **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: Desktop Management, Category: Computer, Subcategory: Request New Computer).

3. In the Computer section, select an **item** from the Computer drop-down (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 (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

CSM provides the following OOTB 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 e-mail correspondence. For example, e-mails 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](#).
- **Journal - Remote Support History:** Tracks chat/remote support sessions.



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

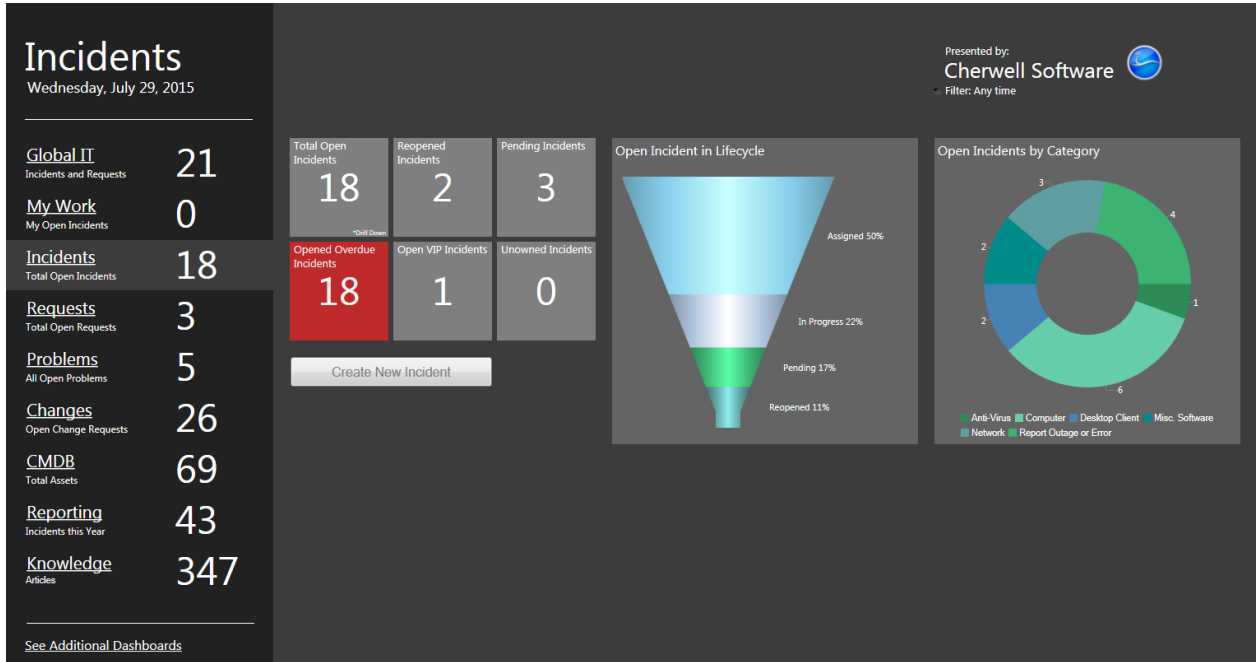
Each Journal Type has its own unique form. Journals are child records, so they are linked to and available from their parent records (access Journals by clicking the Journals tab in the parent record's Arrangement).

# Incident Dashboards

CSM provides the following OOTB Incident Dashboards:

# Incident Dashboard

CSM provides an OOTB 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 OOTB Dashboards (ex: Global IT and Executive).

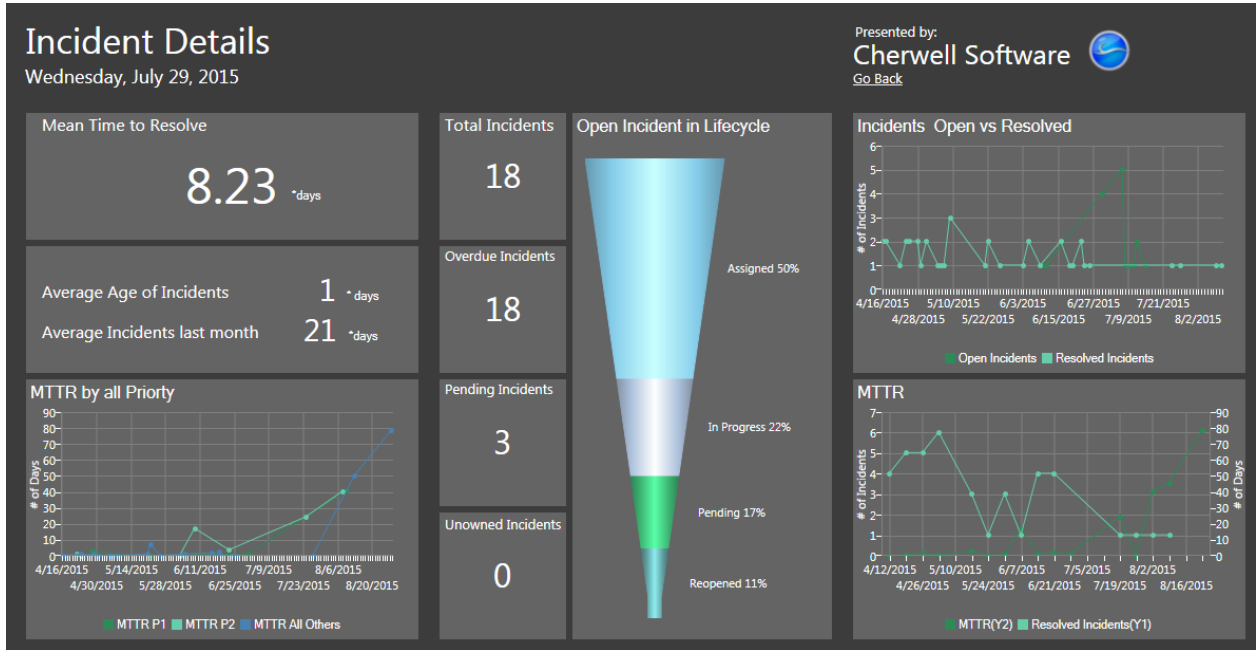
The following table describes the items on the Dashboard.

Item	Description	Widget Type	Widget Name	Widget Uses:
Create New Incident	Creates a new Incident Record.	Button	NA	Create Business Object Action
Total Open Incidents	Number of Open Incidents (Status does NOT = Resolved or Closed). Drills down into the Incident Details Dashboard.	Text Gauge	Total Open Incidents	Open Incidents Search Group Incident Details Dashboard
Reopened Incidents	Number of Reopened Incidents (Status = Reopened).	Text Gauge	Total Reopened Incidents	Re-Opened Incidents Search Group

Item	Description	Widget Type	Widget Name	Widget Uses:
Pending Incidents	Number of Reopened Incidents (Status = Pending).	Text Gauge	Current Pending Incidents	Pending Incidents Search Group
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 Search Group
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 Search Group
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 Search Group
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 Search Group
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 Search Group
Filter	Filters the data on the Dashboard by time (ex: Today, yesterday, within last week, etc.).	Filter	CD - Date Filter - 30 day default	

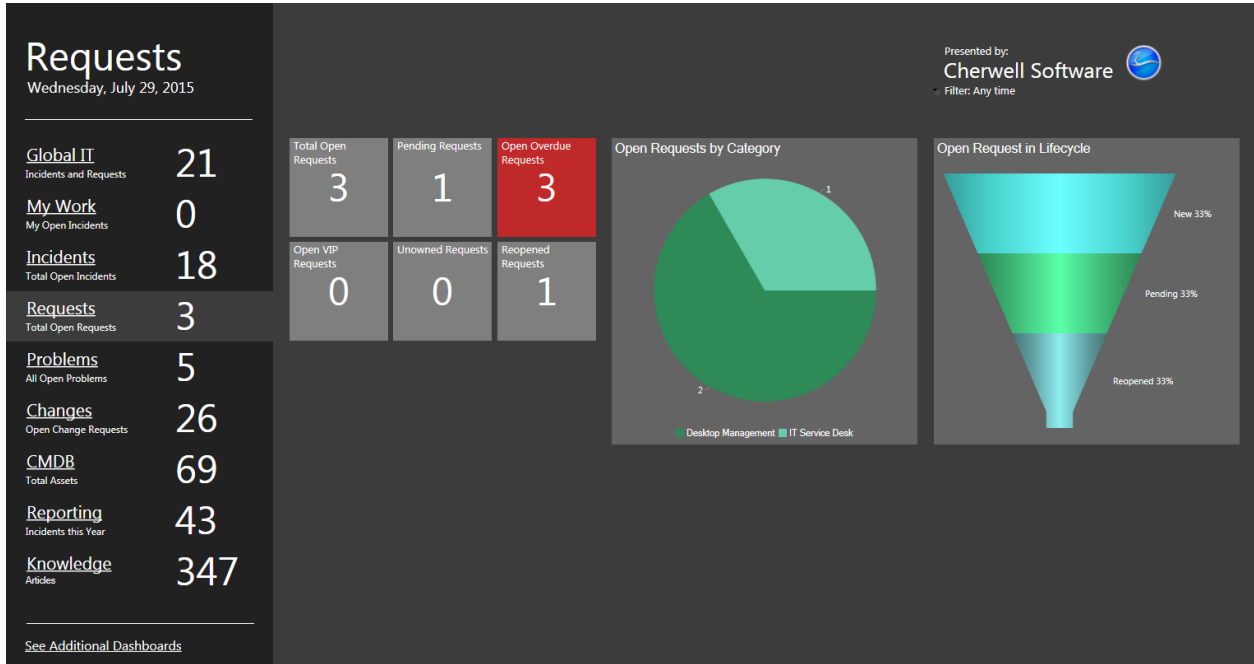
# Incident Details Dashboard

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



# Service Request Dashboard

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



**Note:** Request metrics are also found on other OOTB Dashboards (ex: 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 Reopened).	Text Gauge	Total Open Requests	Open Requests Search Group
Pending Requests	Number of Reopened Requests (Status = Pending).	Text Gauge	Current Pending Requests	Pending Requests Search Group
Open Overdue Requests	Number of Open Requests (Status does NOT = Closed or Reopened) that have not been resolved by the SLA deadline.	Text Gauge	Current Overdue Requests	Open Overdue Search Group
Open VIP Requests	Number of Open Requests (Status does not = Closed or Reopened) initiated by a VIP Customer.	Text Gauge	Total Open VIP Requests	Total Open VIP Requests Search Group



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

# Incident One-Step Actions

CSM provides the following default Incident [One-Step Actions](#):

One-Step Actions	Description/Actions	Associations	Executed From
<b>Status</b>			
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	Incident Form: Next: <Status>
Alt 2 Step from Relationship			
Next Step from Relationship			
<b>Form</b>			
<b>Ownership</b>			
Assign to ANY Individual	<p>Prompts the User to assign the record to any CSM User (not limited by Team). Uses Owned By ID and Owned By Team fields.</p> <p>Changes the Incident Status from New to Assigned.</p>	Incident	Incident Form: Assign To link
Assign to Individual	<p>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.</p> <p>Changes the Incident Status from New to Assigned.</p>	Incident	Incident Form: Owned By link
Assign to Team	<p>Launches the Choose Team window, where a User can choose an Owned By Team for the record.</p>	Incident	Incident Form: Owned By Team: link
Take Ownership	<p>Makes the Current User the Primary User of the record.</p> <p>Changes the Incident Status from New to Assigned.</p>	Incident	Incident Form: Take Ownership link (I Want To section)
<b>Other</b>			

Date Time Stamps Popup	Displays details for all the date/ timestamps to give a historical view of the Incident.	Incident	Incident Form: View Detailed Date/Time Information link (I Want To section)
Nominate for KB	<p>Creates a new Knowledge Article (KA) populated with the Description, Categorization, and Solution/Workaround from the Incident.</p> <p>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.</p>	Incident	<p>Incident Form: Submit to Knowledge Base link (I Want To section)</p> <p>Incident form: Submit to Knowledge Base button in Resolution Details (new tab that appears in Form Arrangement when Incident is resolved)</p> <p>Incident form: Nominate for Knowledge Base link in Task Pane under Incident Actions</p>

A full list of One-Steps 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-Steps associated with a particular type of Business Object.

## Incident Search Groups


CSM provides numerous OOTB Incident [Search Groups](#). Notable Incident Search Groups include:

Search Group	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 OOTB Incident [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 e-mail 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 e-mail 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 e-mail 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 e-mail 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 e-mail 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 e-mail 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 e-mail 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 e-mail 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 e-mail 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 e-mail 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 e-mail 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	<p>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.</p> <p><b>Tip:</b> Use this Automation Process for Report or Dashboard metrics.</p>
Resolve to Closed Process	<p>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.</p>
Respond by Breached - Incident Created	<p>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 e-mail to the manager of the User who owns the Incident to notify them of the breach.</p>
Respond by Warning - Incident Created	<p>Waits for the SLA Response Time value to pass after an Incident is created. If it passes, this process sends an e-mail 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.</p>
Responded - Calc SLA Good Field	<p>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.</p> <p> <b>Tip:</b> Use this Automation Process for Report or Dashboard metrics.</p>

# Incident Reports

CSM provides numerous OOTB Incident [Reports](#), including several Reports with drill-down functionality. Notable Incident Reports include:

Report	Description	Association	Search Group
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	Search Group
Condensed Incident Duration Metrics	<p>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.</p> <p>Drill down to view the Incidents by clicking a link in the Incident ID column.</p>	Incident	Closed in Date Range
Condensed Incidents with Longest Duration	<p>Drill-down Report. Bar graph shows the number of days required to close Incidents (by Incident category) within a User-specified date range.</p> <p>Drill down to view the Incidents by clicking a link in the Incident ID column.</p>	Incident	Date Range for Report
Incident List with Audit Trail	<p>Drill-down Report. Lists Incidents and their associated Journal Records within a User-specified date range.</p> <p>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).</p>	Incident	Date Range for Report
Incident List with Task Audit Trail	<p>Drill-down Report. Lists Incidents and their associated Task records within a User-specified date range.</p> <p>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).</p>	Incident	Date Range for Report
Incidents by Source Call	<p>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.</p> <p>Drill down to view the Incidents by clicking a link in the Incident Source column.</p>	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:

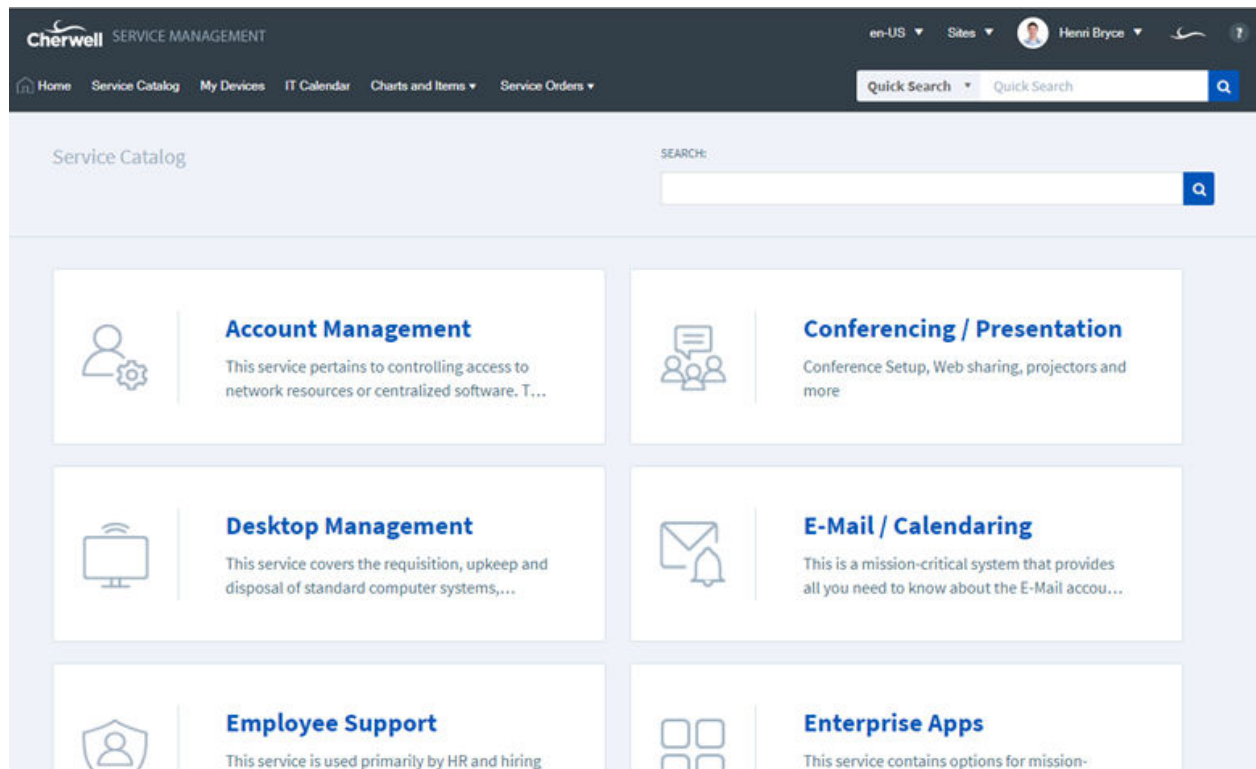
- Basic information: Name, description, status, stakeholders/owners, costs, etc.
- Service Categorization: The Service categorization has a three-tiered organization (Service, category, and subcategory) that determines the type of support required (Incident or Request), which [Specifics form](#) to display 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.

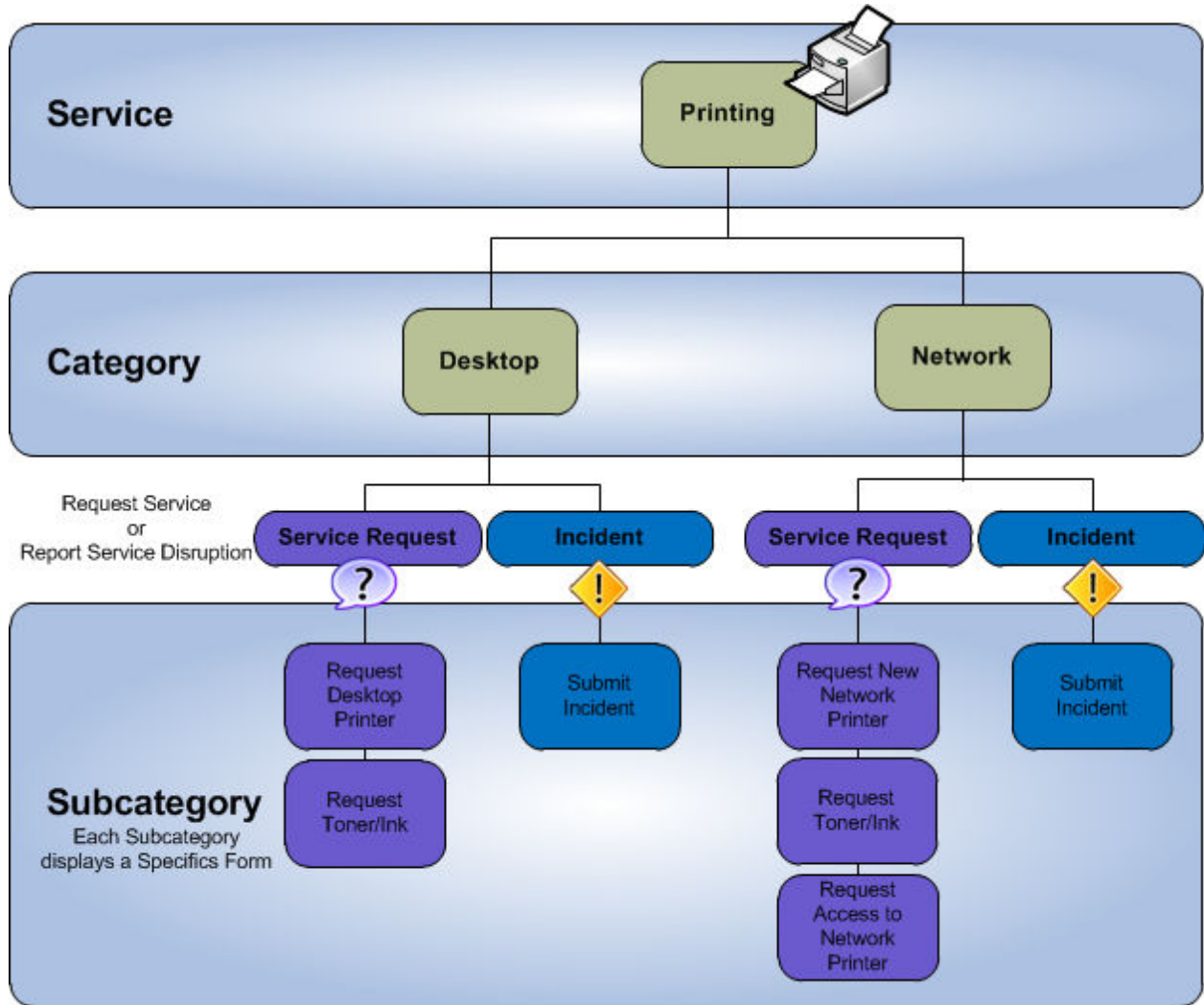


In CSM, a Service is a Major Business Object. The Service Form defines each Service. For more information about the Service Form, refer to the [Service Form](#) documentation.

# Service Categorization

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

The following figure shows how the Service, category, and subcategory work together to identify an issue as an Incident or 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-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 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	<a href="#">Standard Details</a>
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. CSM provides two types of SLA models, including time-based (default) and hierarchy-based. Use one of these models to define how the system operates when multiple SLAs apply to a particular Incident/Service Request. Since response and resolution deadlines can only be calculated based on one SLA, the system must select which SLA these deadlines use during calculation.



**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.

CSM provides the ability to set different SLA Respond/Resolve target times using the [target times wizard](#). SLA target times 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 (ex: 8 hours) for executives. Reserve your most aggressive Respond target times (ex: 5 minutes) for a critical P1 Config Item Incident, such as your Primary Server going down.

CSM also provides the ability to Stop The Clock (pauses the SLA Clock), define Business Hours (apply/calculate SLA target times using working days/times), link Operational Level Agreements (OLAs) and Underpinning Contracts, and set timeframes for potential breach warnings.



**Note:** For a detailed spreadsheet of OOTB SLA Respond/Resolve target times, organized by SLA type, record type, priority, and Work Hours, see the [SLA/Priority Spreadsheet](#). You can also use this spreadsheet to design your own SLA structure/Priority Matrix.

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

## SLA Good to Know

- CSM provides the ability to set different SLA Respond/Resolve target times 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.
- CSM provides multiple [OOTB SLAs](#) for use throughout CSM. Use these SLAs as-is or create your own using the SLA form.
- The Respond By Warning and Resolve By Warning One-Step Actions use the Working Hours Calendar in their calculations to ensure that Users receive SLA notifications during normal business hours.
- CSM implements several OOTB Actions/One-Step Actions to make Service Level 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 (ex: Major).

- The Quick Info Tile (left) displays important at-a-glance information:
  - The Status alert bar displays the current status of the SLA 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 SLA to the next status.
  - The Breached Incidents alert bar displays the number of open Incidents that have breached the SLA Resolve or Resolution deadline.
  - The Open Incidents alert bar displays the number of open Incidents associated with the SLA.
  - The Owner section displays the current [owner](#) (oneself, a User, or a Team). SLAs can be assigned by clicking one of the Ownership links in the Quick Info Tile.
- The workflow bar (top of Main Pane) indicates the current phase of the SLA as it moves through its [workflow](#). Dark gray indicates the current phase.
- The Main Pane displays the main form fields.
- Fields:
  - Some validated fields can recognize what you are typing and will suggest a value for you (ex: Type "P" into the field; CSM will suggest the first item it finds that starts with the letter P). Use your 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.



# OOTB SLAs

OOTB SLAs are organized into the following SLA types:

- **Config Item:** SLAs for Configuration Items (CIs), typically based on criticality (ex: Primary Server). A Config Item SLA overrides every other SLA (Service, Customer, and Corporate).
- **Service:** SLAs for a Service, typically based on criticality (ex: E-mail 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.

# Define SLA Target Times for an Existing SLA

## To define SLA target times for an existing SLA:

1. Open the SLA that you want to edit:
  - a. Click **Searching** on the CSM menu bar and select **Search Manager**.

The Search Manager opens.

- b. Select **SLA** from the Association drop-down.
- c. Click the **All SLAs** Search Group, and then click the **Run** button.

A list of SLAs opens in the Grid.

- d. Double-click the **SLA** that you want to edit (ex: Corporate).

The SLA record opens.

2. (Optional) Edit SLA Fields.



**Note:** For detailed Field information, refer to the SLA Form in the online help.

3. Click the **SLA Target Time** tab (SLA Arrangement section).
4. Click an **SLA Target Time** (ex: Priority 1 Incident).

The SLA Target Time Form opens to the right of the Grid.

## SLA Target Time Next

Step 1

Priority

Step 2

Hours

Step 3

Response

Step 4

Resolution

Review

Choose a priority for when this SLA Target Time will be applied:

Parent Type (record type that this SLA Target Time will apply to):

Incident

Next

5. Click the **Review** link.



**Tip:** You can also use the target times wizard to edit target times by clicking the **Step** links on the Form.

a. Edit the Response Time Fields:

- i. Response Time: Select the target number of **days, hours, or minutes** to respond to the Incident (ex: 1 hour).



**Note:** 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.

- ii. Applies: Select the **Business Hours** that constrain the Response Time (ex: 24/7).
- iii. **Work Hours:** Click the icon to the right of the text field to open the Business Hours Manager. The manager sets the Time Zone (based on time zones or the time zone of the server that is using the business hours), Default Hours, and Exceptions.
- iv. Warning: Select the number of **days, hours, or minutes** before a Response Breach to initiate a warning (ex: 15 minutes). This is used to alert you of an impending breach.



**Note:** The warning time must be shorter than the response time. If it is not, a warning icon ⚠ appears.

b. Edit the Resolution Time Fields:

- i. Resolution Time: Select the target number of **days, hours, or minutes** to resolve the Incident (ex: 5 Hours).




**Note:** 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.

- ii. Applies: Select the **Business Hours** that constrain the Resolution Time (ex: M-F 8-5). The SLA uses Business Hours to help calculate the Resolution and Response times.
- iii. Warning: Select the number of **days, hours, or minutes** before a Resolution Breach to initiate a warning (ex: 15 minutes). This is used to alert you of an impending breach.



**Note:** The warning time must be shorter than the resolution time. If it is not, a warning icon ⚠ appears.

6. (Optional) Edit additional target times.

7. Click **Save** . The new target time appears in the SLA Target Times Tab.

# 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).

The following figure shows how the Priority Matrix Element Form populates the Priority Matrix.



**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



# SLA/Priority Spreadsheet

The following table describes the OOTB SLAs. SLAs are listed hierarchically by SLA type, and show Response/Resolve Target Times by Work Hours and Priority.



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

SLA	Description	SLA Type	Target Times			
			Work Hours	Priority	Response	Resolve
<b>Config Item</b>						
Primary Server	SLA for the Server the runs many of the mission-critical applications.	Standard	<b>Incidents</b>			
			24x7	1	5 mins	1 hrs
				2	5 mins	2 hrs
				3	10 mins	3 hrs
				4	15 mins	4 hrs
			<b>Service Requests</b>			
			8-5 Monday -Friday	1	10 mins	2 hrs
				2	15 mins	3 hrs
				3	20 mins	4 hrs
			<b>Service</b>			
Email Service	SLA for Email Service provided for the entire organization.	E-mail/ Calendaring	<b>Incidents</b>			
			24x7	1	15 mins	2 hrs
				2	15 mins	4 hrs
				3	30 mins	6 hrs
				4	30 mins	8 hrs
			<b>Service Requests</b>			
			8-5 Monday -Friday	1	1 hr	6 hrs
				2	2 hrs	1 day
				3	4 hrs	3 days
			<b>Customer</b>			

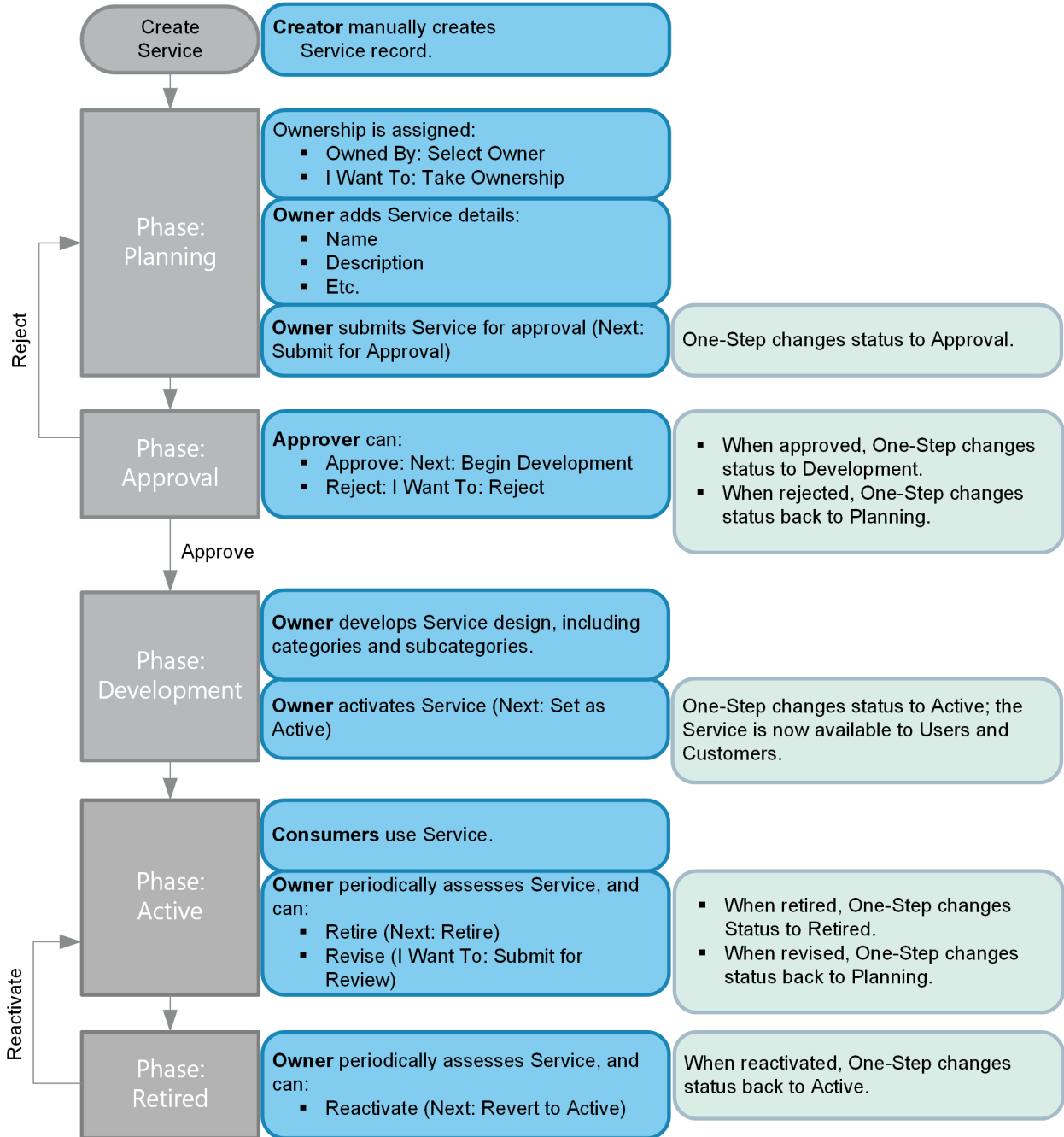
SLA	Description	SLA Type	Target Times			
			Work Hours	Priority	Response	Resolve
Platinum	SLA for VIP Customers (must be Director or above).	Standard	<b>Incidents</b>			
			24x7	1	15 mins	2 hrs
				2	15 mins	4 hrs
				3	30 mins	6 hrs
				4	30 mins	8 hrs
			<b>Service Requests</b>			
			8-5 Monday-Friday	1	25 mins	4 hrs
				2	1 hr	8 hrs
				3	4 hrs	2 days
			Gold	SLA for IP Customers (ex: Sales and IT Department).	Standard	<b>Incidents</b>
24x7	1	30 mins				3 hrs
	2	30 mins				8 hrs
	3	1 hr				12 hrs
	4	3 hrs				16 hrs
<b>Service Requests</b>						
8-5 Monday-Friday	1	1 hr				4 hrs
	2	2 hrs				12 hrs
	3	4 hrs				16 hrs
Silver	SLA for managers and Supervisors.	Standard				<b>Incidents</b>
			24x7	1	45 mins	5 hrs
				2	45 mins	1 day
				3	2 hrs	2 days
				4	5 hrs	3 days
			<b>Service Requests</b>			
			8-5 Monday-Friday	1	75 mins	4 hrs
				2	2 hrs	2 days
				3	3 hrs	5 days

SLA	Description	SLA Type	Target Times			
			Work Hours	Priority	Response	Resolve
Bronze	SLA for the Accounting Department.	Standard	<b>Incidents</b>			
			24x7	1	1 hr	6 hrs
				2	1 hr	2 days
				3	2 hrs	3 days
				4	2 hrs	5 days
			<b>Service Requests</b>			
			8-5 Monday-Friday	1	2 hrs	2 days
				2	2 hrs	5 days
				3	1 day	10 days
			<b>Corporate</b>			
Corporate	Default SLA for all Customers who are not entitled to a Customer Service Level.	Standard	<b>Incident</b>			
			24x7	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
			<b>Service Requests</b>			
			8-5 Monday-Friday	1	2 hrs	2 days
				2	2 hrs	5 days
				3	1 day	10 days

The SLA form captures the above information. For more information about the SLA form, see SLA Form in the online documentation.

# Service Workflow

The following figure describes the high-level Service workflow in the OOTB system.





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

## 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 (ex: 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 (technician) 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. Service is periodically assessed by the owner. Service can be sent back for review/rework or be retired if necessary.
5. **Retired:** Expired/out-of-date Service is retired. Service can be reactivated, if necessary.

## Statuses

A Service progressing through the workflow encounters the following statuses:

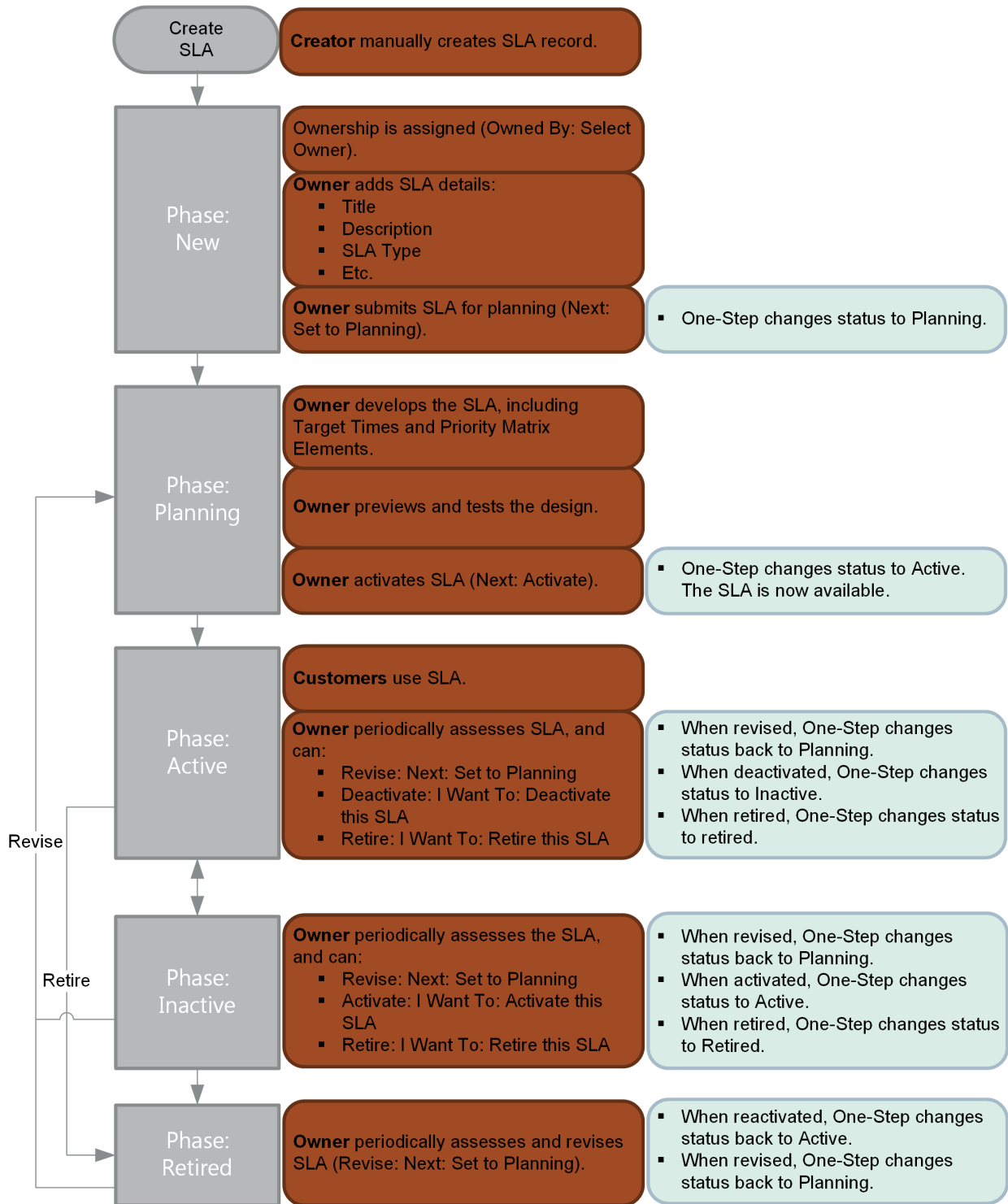
1. **Planning:** Service is being created, assigned an owner, designed, and submitted for Approval.
2. **Approval:** Service is being approved by the approver.
3. **Development:** Service is being developed (refined).
4. **Active:** Service is operational in a live environment.
5. **Retired:** Service is retired from use.



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

## SLA Workflow

The following figure describes the high-level SLA workflow in the OOTB system.







**Note:** CSM uses several features to enhance the SLA workflow (ex: The SLA Form helps create and manage SLAs, One-Step Actions help move an SLA through its workflow, etc.).

## Contributors

An 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 who creates the SLA. This is typically a member of the Services Team.
- **Owner:** User who manages the SLA. This is typically a member of the Services Team.
- **Consumer:** Person who 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.

## Statuses

An SLA progressing through the workflow encounters the following statuses:

1. **New:** SLA is being created, assigned an owner, designed, and submitted for planning.
2. **Planning:** SLA is being developed (refined and tested), and then activated.
3. **Active:** SLA is operational in a live environment.
4. **Inactive:** SLA is temporarily out of use.
5. **Retired:** SLA is retired from use.

# Create a Service/SLA/Priority Structure

To create a Service, SLA, Priority structure:

1. Design a three-tier [Categorization for each Service](#).
2. Complete your own [SLA/Priority Spreadsheet](#).
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.

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

- 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.

## Priority Matrix Element

---

Priority Group:

Type:  Incident  Service Request

Urgency:

Impact:

Priority:

MatrixOrder:

Description:

iii. Define the priorities.

**Note:** For detailed field information, refer to the [Priority Matrix Element form documentation](#).

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.

The screenshot displays the 'Service Form' interface. On the left, the 'Status' is set to 'Planning' with a 'Next: Submit for approval' link. Below this, there are two green bars showing 'Breached Incidents' and 'Open Incidents', both with a count of 0. The 'Owned By' section includes a user selection dropdown and a team selection dropdown. The 'I Want To' section has links for 'Take Ownership', 'View Detailed Date/Time Information', and 'Visualize'. The top navigation bar includes tabs for 'Planning', 'Approval', 'Development', 'Active', and 'Retired'. The 'Details' section contains the following fields:

- Service Name: [Text Input]
- Service Manager (Owned By): [Dropdown]
- Specifics Name: [Dropdown]
- Service Description: [Text Area]
- Services Included: [Text Area]
- Service SLA: [Dropdown]
- Review Date: [Text Input]
- Service Type: [Dropdown]
- Service Classification: [Dropdown]
- Importance: [Dropdown]
- Visible in Customer Portal:
- Optional Services: [Text Area]
- Services Excluded: [Text Area]
- SLAs Entitled to this Service: [Text Input] (Platinum, Gold, Silver, Bronze) (comma (,) separated list)

At the bottom, there is a table with columns: Service Name, Owned By Team, Service Description, Importance, Operating Hours, Service Availability, and Status. The table currently shows 'No records'.

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 in the I Want To section 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 the **Retire this SLA** link in the I Want to section (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.
- **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.
- **E-mail:** Change the templates that are used to create the e-mails sent by One-Step Actions or Automation Processes (ex: "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 (ex: 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.
- **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 three main areas:

1. Workflow Bar: Tracks the Service as it progresses through the Service workflow. Dark gray indicates the current phase.
2. Quick Info Tile: Displays important at-a-glance information, such as Status bar (current and next Status), Breached Incidents, Open Incidents, ownership information, and common operations (I Want To).
3. Main Pane: Displays the main form fields.
4. Form Arrangement: Dynamically displays linked records (child records) that are in a relationship with the Service (parent record).

The screenshot shows the Service Form interface. At the top, a workflow bar (1) includes tabs for Planning, Approval, Done, Active, and Retired. The left sidebar (2) displays the Service status as 'Planning' (Next: Submit for approval), along with metrics for Breached Incidents (0) and Open Incidents (0). It also shows ownership options ('- select owner -', '- select team -') and an 'I Want To:' section with links for 'Take Ownership', 'View Detailed Date/Time Information', and 'Visualize'. The main form area (3) contains fields for Service Name, Service Type, Service Manager, Service Classification, Service Description, Services Included, Services Excluded, Optional Services, Service SLA, SLAs Entitled to this Service (Platinum, Gold, Silver, Bronze), Importance, and Review Date. A 'Visible in Customer Portal' checkbox is also present. At the bottom, a table (4) displays linked records with columns for Service Name, Service Description, Importance, Operating Hours, Service Availability, and Status. The table currently shows 'No records'.

## Good to know:

- Search for one or more Services that meet a specific criteria by running a [Quick Search](#) or [Search Group](#).

- Create a new Service by clicking **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 Actions 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 (ex: Major).


- The Quick Info Tile (left) displays important at-a-glance information:
  - The Status alert bar displays the current status of the Service 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 Service to the next status.
  - The Breached Incidents alert bar displays the number of open Incidents that have breached the SLA Resolve or Resolution deadline.
  - The Open Incidents alert bar displays the number of open Incidents associated with the Service.
  - The Owner section displays the current [owner](#) (oneself, a User, or a Team). Services can be assigned by clicking one of the Ownership links in the Quick Info Tile.
- The workflow bar (top of Main Pane) indicates the current phase of the Service as it moves through its [workflow](#). Dark gray indicates the current phase.
- The Main Pane displays the main form fields.
- Fields:
  - Some validated fields can recognize what you are typing and will suggest a value for you (ex: Type "P" into the field; CSM will suggest the first item it finds that starts with the letter P). Use your 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
<b>Quick Info Tile</b>	Important at-a-glance information, such as record type, Status bar (current and next Status), breached Incidents, open Incidents, <a href="#">record ownership</a> , and common operations (I Want To).	
<Service Name>	Name that uniquely identifies the Service.	
<b>Status</b>	<a href="#">Service workflow</a> status.	
Status	<p>Current Status of the Service as it moves through the Service workflow. Statuses include:</p> <ul style="list-style-type: none"> <li>• <b>Planning:</b> Service is being created and designed.</li> <li>• <b>Approval:</b> Requirements are being finalized and authorized. Requirements are communicated, budgets and resources are allocated.</li> <li>• <b>Development:</b> Service is being developed (refined and tested).</li> <li>• <b>Active:</b> Service is operational in a live environment.</li> <li>• <b>Retired:</b> Service is retired from use.</li> </ul>	
Next: Status	<p>Click the <b>links</b> to move the Service through the Service workflow. Actions include:</p> <ul style="list-style-type: none"> <li>• <b>Submit for Approval:</b> Changes the Service Status to Approval.</li> <li>• <b>Begin Development:</b> Changes the Service Status to Development.</li> <li>• <b>Reject:</b> Changes the Service Status back to Approval.</li> <li>• <b>Set as Active:</b> Changes the Service Status to Active.</li> <li>• <b>Retire:</b> Changes the Service Status to Retired.</li> <li>• <b>Submit for Review:</b> Changes the Service Status back to Approval.</li> </ul>	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).
<b>Breached Incidents alert bar</b>	Number of Open Incidents that have breached the SLA's Resolve deadline.	
<b>Open Incidents alert bar</b>	Number of Open Incidents bound	
<b>Owned By</b>	Record owner.	

Field	Description	Comments
User Owner -select owner-	Name of the User owner. Click the <b>link</b> to first select a Team and then a User owner (User is limited by Team).  Typically, the owner is the IT/Business Manager.	One-Step Action (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.
Team Owner -select team-	Name of the Team owner. Click the <b>link</b> to select a Team owner.	One-Step Action (Assign to Team):  Launches the Choose Team window, where a User can choose an Owned By Team for the record.
Avatar	Photo/graphic associated with the User owner (from User Profile).	
Owner E-mail Address	Owner's e-mail address (from User Profile).	
Owner Phone Number	Owner's phone number (from User Profile).	
<b>Owned By</b>	Record owner.	
User Owner -select owner-	Name of the User owner. Click the <b>link</b> to first select a Team and then a User owner (User is limited by Team).  Typically, the owner is the IT/Business Manager.	One-Step Action (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.
Team Owner -select team-	Name of the Team owner. Click the <b>link</b> to select a Team owner.	One-Step Action (Assign to Team):  Launches the Choose Team window, where a User can choose an Owned By Team for the record.
Avatar	Photo/graphic associated with the User owner (from User Profile).	
Owner E-mail Address	Owner's e-mail address (from User Profile).	
Owner Phone Number	Owner's phone number (from User Profile).	
<b>Main Pane</b>		
<b>Details</b>		

Field	Description	Comments
Service Name	Name that uniquely identifies the Service. Be succinct because the Service Catalog displays this name.	
Service Type	Type of Service: <ul style="list-style-type: none"> <li>• Technical</li> <li>• Business</li> </ul>	
Service Manager	Service/Record owner. Person responsible for owning the Service.	
Service Classification	Service Classification: <ul style="list-style-type: none"> <li>• Core IT</li> <li>• On Demand</li> <li>• Subscription</li> </ul>	
Service Description	Description of the Service.	
Services Included	List of mini services included in the Service.	
Services Excluded	List of mini services not included in the Service.	
Optional Services	List of optional services included in the Service.	
Service SLA	Service SLA bound to this Service, if applicable.   <b>Note:</b> Not many Services require a special SLA. In the OOTB system, only Desktop Management and E-mail Calendaring have their own SLAs.	
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.	
Importance	Service Importance: <ul style="list-style-type: none"> <li>• Mission-Critical</li> <li>• Support</li> <li>• Optional</li> </ul>	

Field	Description	Comments
Review Date	Scheduled review MM/DD/YYYY for the selected Service. Click the <b>Calendar button</b>  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.
<b>Alignment and Cost</b>	Click the <b>Alignment and Cost</b> link to view the form.	
Business Alignment	Business reasoning/support for the Service.	
Business Owner	CSM User who is responsible for being the business stakeholder.	
Maintenance Cal	Defined Business Hours for the Service, as defined in the Business Hours Manager.	
Outsourced To	Vendor to whom the Service is outsourced, if any.	
Default OLA Team	Default OLA team responsible for the operational components of the Service.	
Linked Image	Image that represent the Service in the UI. Click the <b>Set Image button</b> to open the Image Manager, where you can select or import an image.	
Cost	Cost per hour associated with the Service.	
<b>Arrangement</b>	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 <a href="#">Service Categorization</a> .
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 <a href="#">About Incidents and Requests</a> .
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 (ex: Down for maintenance).	
SLAs	Displays SLAs that are bound to this Service.	For more information, see <a href="#">Service Level Agreements (SLAs)</a> .
OLAs	Displays related Operational Level Agreements (OLAs) that affect this Service. Operational Level Agreements define how Departments will work together to meet SLAs.	

Field	Description	Comments
Underpinning Contracts	Displays related Underpinning Contract records (agreements created between the IT Service Provider and an external supplier of services) that affect this Service.	An Underpinning Contract is an agreement created between the IT Service Provider and an external supplier of services.



**Note:** For more information about the Service One-Step Actions, see [Service One-Step Actions](#).

# 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's Arrangement area). 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.




**Note:** For more information about creating Target Times, see [Create a Service Catalog \(Service, SLA, Priority Structure\)](#).

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 will be 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, Hour, or Minutes to Respond to the Incident (ex: 1 Hour).	



Field	Description	Comments
Resolution Time	Target number of Days, Hour, or Minutes to Resolve the Incident (ex: 4 Hours).	
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.	<b>Note:</b> When you create new Business Hours, you must update the Created During What Business Hours Expression to reflect the new hours. If Business Hours overlap, move the preferred hours above the other hours in the list.
Work Hours (Resolution Time)	Click the <b>Business Hours Manager button</b>  to launch the Business Hours Manager where you can select existing Business Hours or <b>create</b> new Business Hours. Also select the time zone for the Business Hours based on time zones or the time zone of the Cherwell Application Server.	
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.	



**Note:** For more information about the SLA Target Time One-Step Actions, see SLA One-Step Actions.

# 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).

The following table describes the fields on the form.

Field	Description	Comments
Priority Group	<p>Specifies which Priority Group (Priority Matrix) the value is in:</p> <ul style="list-style-type: none"> <li>• Standard: Standard Priority Matrixes for Incident and Request.</li> <li>• E-mail/Calendar: Priority Matrixes dedicated to the E-mail/Calendar Service.</li> <li>• Custom.</li> </ul>	
Incident/Service Request	Specifies whether the value is in the Incident or Request Priority Matrix.	
Urgency	Specifies which Priority Matrix row the Priority is in.	The value is put into the row and column that intersect.
Impact	Specifies in which Priority Matrix column the Priority is in.	
Priority	Specifies the value of the priority.	
Matrix Order	Specifies the vertical and horizontal sort order for the grid (low to high). We recommend that you build left to right, then down.	
Description	Description of the priority.	

# Service One-Step Actions

CSM provides the following OOTB Service One-Step Actions.

One-Step Action	Description/Actions	Association	Executed From
<b>Status Actions</b>			
Alt 1 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>
Alt 2 Step from Relationship			
Next Step from Relationship			
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>
<b>Form Actions</b>			
<b>Ownership</b>			
Assign to ANY Individual	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	Service 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.	Service	Service Form: Owned By link
Assign to Team	Launches the Choose Team window, where a User can choose an Owned By Team for the record.	Service	Service Form: Owned By Team link
Take Ownership	Makes the Current User the Primary User of the record.	Service	Service Form: Take Ownership link (I Want To section)
<b>Other</b>			
Date/Time Information	Displays details for all the date/timestamps to give a historical view.	Service	Service Form: View Detailed Date/Time Information link (I Want To section)

A full list of One-Steps 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-Steps associated with a particular type of Business Object.

## Service Search Groups

CSM provides the following OOTB Service Search Groups.

Search Group	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 [Search Group](#).
- 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.
- By default, Problem uses the Incident Service and Category structure. Access Category options by clicking Tools>Table Management>Type>Incident Category.
- 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 (ex: 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 Customer's e-mail address in the Requestor section of the Quick Info Tile. If sent using the File menu, the e-mail is blank. If sent using the Quick Info Tile, an e-mail template is used to auto-populate the e-mail with information from the current Incident (ex: Change ID, Customer's name, logging date/time details, etc.).
- Journals track what occurs during the record's lifecycle (ex: 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 Quick Info Tile (left) displays important at-a-glance information:
  - The Status bar displays 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. Some Problem status links change the status and move the Problem to the next phase.





**Note:** Typically, workflows statuses should be enforced; however, some records do allow Users (with security rights) to bypass statuses (ex: Problems can be manually closed without being formally resolved, if needed). To bypass a status, click one of the alternate statuses in the I Want To section of the Quick Info Tile.


- The Priority bar displays the Problem priority. Red indicates a priority 1, orange indicates a priority 2, and green indicates a priority 3-5.
- The Linked Incidents bar displays a threshold color based on the number of linked Incidents (zero to two is green, three to four is yellow, and above five is red).
- The Owner section displays the current **record owner** (oneself, a User, or a Team). Problems should be assigned to an owner and can be assigned by clicking one of the ownership links in the Quick Info Tile.
- The workflow bar (top of Main Pane) indicates the current phase of the Problem as it moves through its workflow. Dark gray indicates the current phase.
- 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 .
  - Use social media to communicate a Problem by clicking the Tweet button  in the Classify and/or Known Error phase.

**Note:** To use the Tweet button on the Problem Form, you must integrate your Twitter account and activate the Tweet buttons. For more information, see the [Create a Twitter Account](#) and [Activate Twitter Buttons](#) documentation.

- 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.

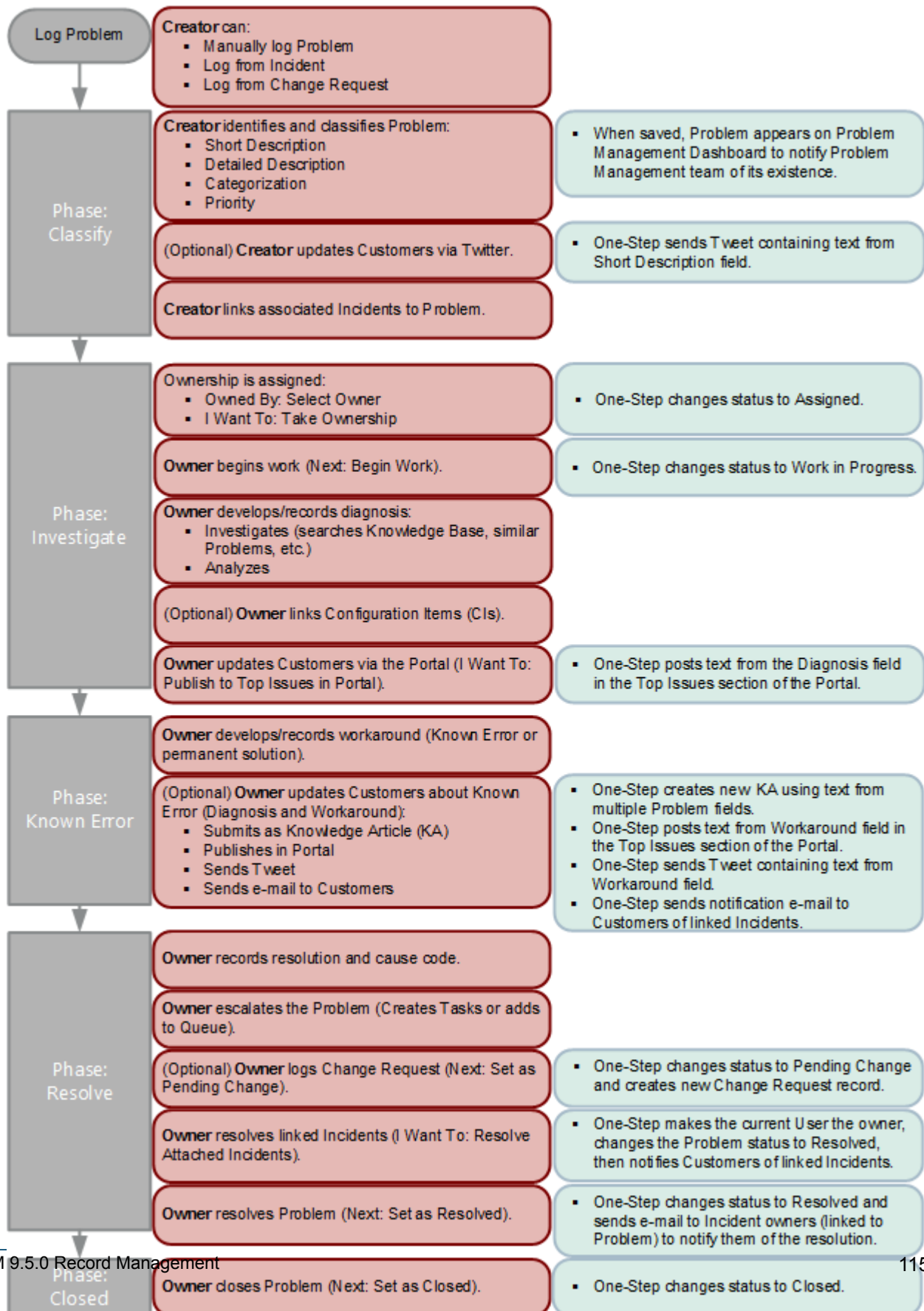


**Note:** A full list of Fields is beyond the scope of this document. Export a schema document from CSM Administrator (Create a Blueprint>Tools>Export Schema) to view a full list of fields associated with a particular type of Business Object (ex: Major).

- 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, Urgency (Priority Matrix), Impact (Priority Matrix), 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.





**Note:** CSM uses several features to manage the Problem workflow (ex: The Problem Form helps create and manage Problems, One-Step Actions help move the Problem through its workflow, Automation Processes notify stakeholders via e-mails, 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 e-mail).
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.

# 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 and a status of New. The Problem automatically enters the Classify phase.

2. Step 1: Identify and classify the Problem:
  - a. Short Description: Provide a **brief explanation** of the Problem.
  - b. Detailed Description: Provide a **detailed explanation** of the Problem.
  - c. Service: Select the affected **Service**.
  - d. Category: Select the affected Service **category**.
  - e. Priority: Select an Incident priority:
    - i. Click the **Priority** drop-down to reveal the Priority Matrix (determined by invoked SLA), and then click a **number** (priority).

The priority is displayed in the Priority alert bar of the Quick Info Tile.

- f. Link **related Incidents** to the Problem:
  - i. Click the **Link** button in the Incidents tab (Arrangement section) to launch the Incident Quick Selector window.

The Incident Selector window opens.

- ii. Select **related Incidents** from the Grid.  
The number of linked Incidents is visible in the Quick Info Tile and the records are visible in the Incident tab (Arrangement section).



**Note:** When a workaround is in place (the Workaround field must be populated), the Resolve Attached Incidents link (I Want To section) is enabled. The link allows you to simultaneously resolve all of the Incidents linked to the Problem.


After the Problem is classified, the Problem automatically enters the Investigate phase.

3. Step 2: Investigate and analyze the Problem:
  - a. Assign an owner to the Problem by clicking one of the ownership links in the Quick Info Tile (Owned By and I Want To sections).




The Problem status changes to Assigned and the ownership information appears in the Quick Info Tile.

- b. The owner begins work:
  - i. In the Status alert bar, click **Begin Work**.

The Problem status changes to Work in Progress.

- c. Diagnosis: Provide a **description** of the diagnosis process. This information might include:
  - Investigative process (ex: Search Knowledge Base, view similar Problems, recreate issue, etc.).
  - Analysis of the results.
- d. Select an affected CI, if any:
  - i. 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, or a specific Customer) or by searching. You can also create a new CI on the fly.
- e. View Impacted CIs: Click this **button** to view a Configuration Map of CIs that are affected by the Problem.
- f. (Optional) Update Customers: Click the **Publish to Top Issues List in Portal** link in the Quick Info Tile to publish the Problem in the Portal. Customers can then subscribe to the Problem.

The Problem automatically enters the Known Error phase.

4. Step 3: Develop/log a workaround and known error, and then update Customers.
  - a. Workaround: Provide an **explanation of the workaround**.
  - b. Update Users and Customers about the known error:
    - Submit Workaround to Knowledge Base: Click the **Knowledge Article** button  to create a Knowledge Article using the described known error.
    - Publish Known Error in Portal: Click the **Publish to Portal** button  to post the known error in the Portal.
    - Tweet the Known Error: Click the **Tweet** button  to post a Tweet of the known error to Customers.
    - Send E-mail Update to Customers: Click this link in the Quick Info Tile to define a message to send via e-mail to the Customers associated with Incidents linked to the Problem.

The Problem automatically enters the Resolve phase.

5. Step 4: Record the root cause and resolution.
  - a. (Optional) Escalate the Problem if you are unable to find a resolution:
    - Create Tasks (Arrangement section) to either escalate the Problem to a higher tier of support, track time, or schedule an immediate Action Item for another Team/User.
    - Add the record to a Queue to escalate the Problem to a higher tier of support.
  - b. Resolution: Provide a **description** of the root cause and resolution.
  - c. Cause Code: In the drop-down, select a **cause type**.
  - d. Resolve the Problem and record resolution details:
    - i. Click **Resolved Attached Incidents** in the Quick Info Tile.
    - ii. Click the **Set as Resolved** link.



The Problem status changes to Resolved.

**Note:** If you find that the Problem was not resolved, reopen the record by clicking the View More Status Options link in the Quick Info Tile and select a status (ex: Work in Progress) from the drop-down.

6. Click the **Close** link to close the Problem.



**Note:** After a Problem is closed, it cannot be reopened.

The Problem status changes to Closed and the Problem enters the Closed phase.

# 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. The Problem automatically enters the Classify phase.

2. Step 1: Identify and classify the Problem.




**Notes:** All fields in the Identify and Classify section are required to move to the Investigate phase.

- a. Short Description: Provide a **brief explanation** of the Problem (example: E-mail is not sending.)
- b. (Optional) Update Customers: Click the **Tweet** button  next to the Short Description field to Tweet the Short Description.

**Note:** To use the Tweet button on the Problem Form, you must integrate your Twitter account and activate the Tweet buttons. For more information, see the [Create a Twitter Account](#) and [Activate Twitter Buttons](#) documentation.

- c. Detailed Description: Provide a **detailed explanation** of the Problem (example: Marketing department e-mail is not sending).


**Tip:** Description is a [Rich Text](#) field. To format the text or embed an image, click the **Zoom** button .

- d. Service: Select the affected **Service** (example: E-mail/Calendaring).
- e. Category: Select the affected Service **Category** (example: Mailbox).
- f. Priority: Select a Problem priority:

- i. Click the **Priority** drop-down to reveal the Priority Matrix (determined by invoked SLA), and then click a **number** (priority).

The priority is displayed in the Priority bar of the Quick Info Tile. The color (red/orange/green) indicates the level of priority.

- g. Link related Incidents to the Problem.

- i. Click the **Link** button  in the Incidents tab (Arrangement area) to launch the Incident Quick Selector window.
- ii. Select **related Incidents** from the Grid.

**Tip:** Hold down the **CTRL** button to select multiple items from the grid.

The number of linked Incidents is visible in the Quick Info Tile and the records are visible in the Incident tab (Arrangement area).

**Note:** The Linked Incidents bar in the Quick Info Tile displays a threshold color based on the number of linked Incidents (Green indicates zero to two linked Incidents, yellow indicates three to four linked Incidents, and red indicates that there are more than five linked Incidents.)

After all required fields are completed, the Problem automatically enters the Investigate phase.

3. Step 2: Investigate and analyze the Problem.


- a. Assign an owner to the Problem by clicking one of the Ownership links in the Quick Info Tile (Owned By and I Want To sections). Ownership is required:
  - Take Ownership: Click this **link** to make yourself the User owner.
  - Assign to: Click this **link** to select a User owner. The Team owner is populated by the User owner's default Team.
  - Select Owner (User): Click this **link** to first select a Team and then a User owner (User is limited by Team).
  - Select Team: Click this **link** to first select a Team owner.

The Problem status changes to Assigned and the Ownership information appears in the Quick Info Tile. CSM automatically sends an e-mail to the owner to notify them of Ownership.

- b. The owner begins work.
  - i. In the Status bar, click **Begin Work**.

The Problem status changes to Work in Progress.


- c. Diagnosis: Provide a **description** of the diagnostic process. This information might include:
  - Investigative process (example: Search Knowledge Base, view similar Problems, recreate issue, etc.).
  - Analysis of the results.

- d. (Optional) Update Customers: Click the **Publish to Top Issues List in Portal** link in the Quick Info Tile to publish the Problem in the Portal. Customers can then subscribe to the Problem using [Affects Me Too](#) functionality.
- e. Affected CI: Select an affected CI, if any:
  - i. 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.
- f. View Impacted CIs: Click this **button** to view a Configuration Map of CIs that are affected by the Problem.

After all required fields are completed, the Problem automatically enters the Known Error phase.

4. Step 3: Develop/log a workaround and known error, and then update Customers.
  - a. Workaround: Provide an **explanation** of the workaround.

**Tip:** Write a detailed procedure so that Users and Customers understand exactly what they are supposed to do.

- b. Update Users and Customers about the known error:
  - Submit Workaround to Knowledge Base: Click the **Knowledge Article** button  to create a Knowledge Article using the described known error.

**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, Category, Workaround, Diagnosis, and resolution.

- Publish Known Error in Portal: Click the **Publish to Portal** button  to post the known error to the Portal.

**Note:** The Diagnosis and Workaround fields are required to publish workaround information in the Portal.

The known error becomes visible in the Top Issues category in the Portal.

**Note:** To remove the known error from the Portal, click the **Remove from Top Issues List** link in the I Want To section of the Quick Info Tile.

- Tweet the Known Error: Click the **Tweet** button  to send a Tweet of the known error to Customers.

**Notes:** The Workaround field is required to Tweet known error information. To use the Tweet button on the Problem Form, you must integrate your Twitter account and activate the Tweet buttons. For more information, see the [Create a Twitter Account](#) and [Activate Twitter Buttons](#) documentation.

- Send E-mail Update to Customers: Click this **link** in the Quick Info Tile to define a message to send via e-mail to the Customers associated with Incidents linked to the Problem.

After all required fields are completed, the Problem automatically enters the Resolve phase.

5. Step 4: Record the root cause and resolution.

- a. Escalate the Problem if you are unable to find a resolution:
  - Create Tasks (Arrangement area) to either escalate the Problem to a higher tier of support, track time, or schedule an immediate Action Item for another Team/User.
  - Add the record to a Queue to escalate the Problem to a higher tier or support.
- b. Resolution: Provide a **description** of the root cause and resolution.

**Note:** This field is required to click the Set to Resolved status.

- c. Cause Code: Select a **cause type** in the drop-down.

Options include:

- Hardware Failure
  - Human Failure
  - Procedure Failure
  - Software Failure
  - Update Failure
- d. (Optional) Create a Change Request from the Problem:
    - i. Click the **Create Change** button in the Task Pane and then select **responses** for each prompt (Change Type, Requestor, Title, and Priority).

A new Change opens in the Main Pane and the Problem status changes to Pending Change.

- ii. Log the Change using the appropriate Change workflow (example: Normal, Standard, Emergency).

**Notes:** Return to the linked Problem at any time by clicking the Go to Problem button



in the Problem tab of the Change Request Form Arrangement. When the linked Change is complete, a notification e-mail is automatically sent to the Problem owner.

- e. Resolve the Problem and record resolution details:
  - i. Click **Resolve Attached Incidents** in the Quick Info Pane to set the status of all linked Incidents to Resolved.

**Tip:** You can also click the **Resolve Linked Incidents** button in the Problem Actions section of the Task Pane to resolve the Incidents.

- ii. Click the **Set as Resolved** link.

The Problem status changes to Resolved.

**Note:** If you find that the Problem was not resolved, you can reopen the record by clicking the View More Status Options link in the Quick Info Tile and selecting the status (example: Work in Progress) you want in the drop-down.

6. Click the **Close** link to close the Problem.



**Note:** After a Problem is closed, the record cannot be reopened.

The Problem status changes to Closed and the Problem enters the Closed phase.

# 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.
- **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 (ex: 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 (ex: "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 (ex: 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 (ex: 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. Workflow Bar: Displays the Problem phases (Classify, Investigate, Known Error, Resolve). Light gray indicates upcoming/complete phases and dark gray indicates that the record is in-phase.
2. Quick Info Tile: Displays important at-a-glance information (Problem ID, Status bar, (current and next status), Priority bar, Linked Incidents bar, record ownership, and common operations (I Want To section).
3. Main Pane: Displays the main form fields, organized by Identify and Classify; Investigation and Analysis; Workaround and Error; and Root Cause and Resolution steps.
4. Arrangement: Dynamically displays linked records (Child Records) that are in a relationship with the parent Problem Record.


The screenshot shows the 'Problem 10230' form. At the top, a workflow bar includes 'Classify', 'Investigate' (highlighted with a red '1'), 'Resolve', and 'Closed'. The main form is organized into four steps: 'Step 1: Identify and Classify' (with fields for Short Description, Detailed Description, Service, Category, and Priority), 'Step 2: Investigation and Analysis' (with fields for Diagnosis and Affected CI), 'Step 3: Workaround and Known Error' (with a Workaround field and buttons for 'Submit Workaround to Knowledge Base', 'Publish Known Error in Portal', and 'Tweet Known Error'), and 'Step 4: Root Cause and Resolution' (with fields for Resolution and Cause Code). A left sidebar (Quick Info Tile) shows 'Status: New', 'Priority', 'Linked Incidents: 0', 'Owned By' (with 'select owner' and 'select team' options), and an 'I Want To' section with various actions like 'Take Ownership' and 'Publish to Top Issues List in Portal'. A bottom section (Arrangement) shows a table with columns 'Type', 'Created', 'By', and 'Details', and a message 'There are currently no records'. Red circles with numbers 1, 2, 3, and 4 are overlaid on the screenshot to indicate the four main areas.


The following table describes the fields on the form.



Field	Description	Comments
<b>Quick Info Tile</b>	Important at-a-glance information, such as Problem ID, Requestor contact information, Status bar (current and next status), <a href="#">record ownership</a> , and common operations ( <i>I Want To...area.</i> ).	
Problem	Record type.	
ID	Unique record identifier (ex: 10220).	CSM automatically assigns the ID when the Problem is created.
<b>Priority Alert Bar</b>	The color (red/orange/green) indicates the level of priority.	
<b>Linked Incidents Alert Bar</b>	The color (red/orange/green) indicates the number of affected Incidents.	
<b>Status Alert Bar</b>	Current and next status of the Problem as it progresses through the <a href="#">Problem workflow</a> .	Problem statuses do not align with Problem phases.
Status	<p>Statuses include:</p> <ul style="list-style-type: none"> <li>• <b>New:</b> Problem is being logged, identified, and classified.</li> <li>• <b>Assigned:</b> Problem has been assigned to an owner.</li> <li>• <b>Work in Progress:</b> Problem is being diagnosed, investigated, and analyzed.</li> <li>• <b>Pending Change:</b> Problem process is on hold until a Change Request is implemented.</li> <li>• <b>Resolved:</b> Problem is resolved.</li> <li>• <b>Closed:</b> Problem is closed.</li> </ul>	
Next: Status	Click the <b>links</b> to move the Problem through the Problem workflow. Actions include:	<p>One-Step Actions (Alt 1 Step from Relationship, Alt 2 Step from Relationship, or Next Step from Relationship):</p> <p>Conditionally changes the record status to next logical status (defined by the status values in Table Management).</p>
	Begin Work: Captures a date-time stamp to track when work began on the Problem.	One-Step Action (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.

Field	Description	Comments
	Set as Pending Change: Temporarily suspends the Problem until a Change Request is implemented.	One-Step Action (Set to Pending Change): Changes Problem status from Work in Progress to Pending Change.
	Set as Resolved: Resolves the Problem.	One-Step Action (Set as Resolved): Changes the Problem status to Resolved.
	Close: Closes the Problem.	One-Step Action (Set as Closed): Changes the Problem status from Resolved to Closed.
<b>Owned By</b>	Record owner.	
User Owner -select owner-	Name of the User owner. Click the <b>link</b> to first select a Team and then a User owner (User is limited by Team).  Typically, the owner is the Reviewer and a member of the Support Team.	One-Step Action (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.
Team Owner -select team-	Name of the owner Team. Click the <b>link</b> to select a Team owner.	One-Step Action (Assign to Team):  Launches the Choose Team window, where a User can choose an Owned By Team for the record.
Assign to	Click the <b>link</b> to select a User owner for the Problem. 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.
Avatar	Photo/graphic associated with the User owner (from User Profile).	
Owner E-mail Address	Owner's e-mail address (from User Profile).	
Owner Phone Number	Owner's phone number (from User Profile).	
<b>I Want To</b>	Common operations (initiate Actions/One-Step Actions).	

Field	Description	Comments
Take Ownership	Click the <b>link</b> to make yourself (Current User) the User owner for the Problem.	One-Step Action (Take Ownership): Makes the Current User the Primary User of the record.
Publish to Top Issues List in Portal	Click the <b>link</b> to 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.	One-Step Action (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 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 to remove the known error.
Send an E-mail Update to Customers	Click the <b>link</b> to define a message to send via e-mail to the Customers associated with Incidents linked to the Problem.	One-Step Action (E-mail Customer): Sends an e-mail to Customers of Incidents linked to the Problem.
Resolve Attached Incidents	Click the <b>link</b> to change the status of linked Incidents to Resolved.	One-Step Action (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.
Set as Resolved	Click the <b>link</b> to automatically change the Problem status to Resolved. When the Problem is resolved, you can also resolve all of the linked Incidents (see the Resolve Attached Incidents link).	One-Step Action (Set as Resolved): Changes the Problem status to Resolved.
View More Status Options	Click the <b>link</b> to open a Prompt popup with a drop-down that contains a list of all available status options (Assigned, Closed, New, Pending Change, Resolved, Work in Progress).	One-Step Action (Update Problem Status): Prompts the User to select a status, and then changes the Problem status.
<b>Workflow Bar</b>	Displays the Problem workflow phases. Dark gray indicates the current phase.	Problem phases do not align with Problem statuses.

Field	Description	Comments
	<p>Workflow phases include:</p> <ul style="list-style-type: none"> <li>• <b>New:</b> Creator logs a new Problem. Then, the creator identifies and classifies the Problem (Description, Service, Category, and Priority).</li> <li>• <b>Investigate:</b> Ownership is assigned. The owner investigates and analyzes the Problem, and then logs a diagnosis. The owner creates a Change Request, if necessary.</li> <li>• <b>Known Error:</b> Owner develops and logs the workaround. Then, the owner can update Users (submit a Knowledge Article to Knowledge Base) and Customer (publish known error to Customer Portal).</li> <li>• <b>Resolve:</b> Owner resolves the Problem (logs resolution details and code).</li> <li>• <b>Closed:</b> Owner closes the Problem.</li> </ul>	
<b>Main Pane</b>		
<b>Step 1: Identify and Classify</b>	Record the basic details.	
*Short Description	A concise description of the Problem.	<p>*Required.</p> <p><b>Note:</b> The Tweet button  (must be activated) is displayed next to the Short Description field. Click the <b>button</b> to Tweet the text in the Short Description field.</p>
*Detailed Description	A detailed description of the Problem.	*Required. Full-Text field (searchable).

Field	Description	Comments
*Service	<p>Service affected by the Problem:</p> <ul style="list-style-type: none"> <li>• Account Management</li> <li>• Conferencing/Presentation</li> <li>• Desktop Management</li> <li>• E-mail/Calendar</li> <li>• Employee Support</li> <li>• Enterprise Apps</li> <li>• IT Service Desk</li> <li>• Network Services</li> <li>• Printing</li> <li>• Telephony/Fax</li> <li>• Web Services</li> </ul>	<p>*Required.</p> <p>Classify a Problem from top down by first selecting a Service, then a Category, and then a Subcategory.</p> <p>For more information, see <a href="#">Service Categorization</a>.</p>
*Category	Service Category that the record relates to (ex: Mailbox).	
*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 <a href="#">Priority</a> .
<b>Step 2: Investigation and Analysis</b>	Record a diagnosis and view affected CIs.	
<b>Step 3: Workaround and Known Error</b>	Record the workaround and update Customers.	
Workaround Exists	Select the <b>check box</b> to indicate that a workaround is available to Customers.	
Workaround	Provide an explanation of a workaround for the Problem.	
Submit Workaround to Knowledge Base	Click the <b>Knowledge Article</b> button  to create a Knowledge Article using the text from the Workaround field.	One-Step Action (Send Known Error to Knowledge): Creates a Knowledge Article in a new window, attaches the Problem, and autofills the Knowledge Article Title, Solution or Workaround, Service, Category, Article Type.

Field	Description	Comments
Publish Known Error in Portal	Click the <b>Portal</b> button  to submit the text from the Workaround field to the Portal.	One-Step Action (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.
Tweet Known Error	Click the <b>Twitter</b> button  to Tweet the known error information.	One-Step Action (Send Known Error Tweet): Tweets the Short Description field.  <b>Note:</b> To use the Tweet button on the Problem Form, you must integrate your Twitter account and activate the Tweet buttons. For more information, see <a href="#">Create a Twitter Account</a> and Activate Twitter Buttons.
<b>Step 4: Root Cause and Resolution</b>	Record the resolution and cause code associated with the Problem.	
Resolution	Provide a description of the root cause and resolution.	
Cause Code	Select a cause code in the drop-down. Options include: <ul style="list-style-type: none"> <li>• Hardware Failure</li> <li>• Human Failure</li> <li>• Procedure Failure</li> <li>• Software Failure</li> <li>• Update Failure</li> </ul>	
<b>Form Arrangement</b>		
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.	

Field	Description	Comments
Tasks	Displays related Tasks.	
Configuration Items	Displays CIs that are related to/support this Problem (ex: Primary CI).	For more information, refer to <a href="#">About CMDB</a> .
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 <a href="#">About Change Requests</a> .



## 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](#).

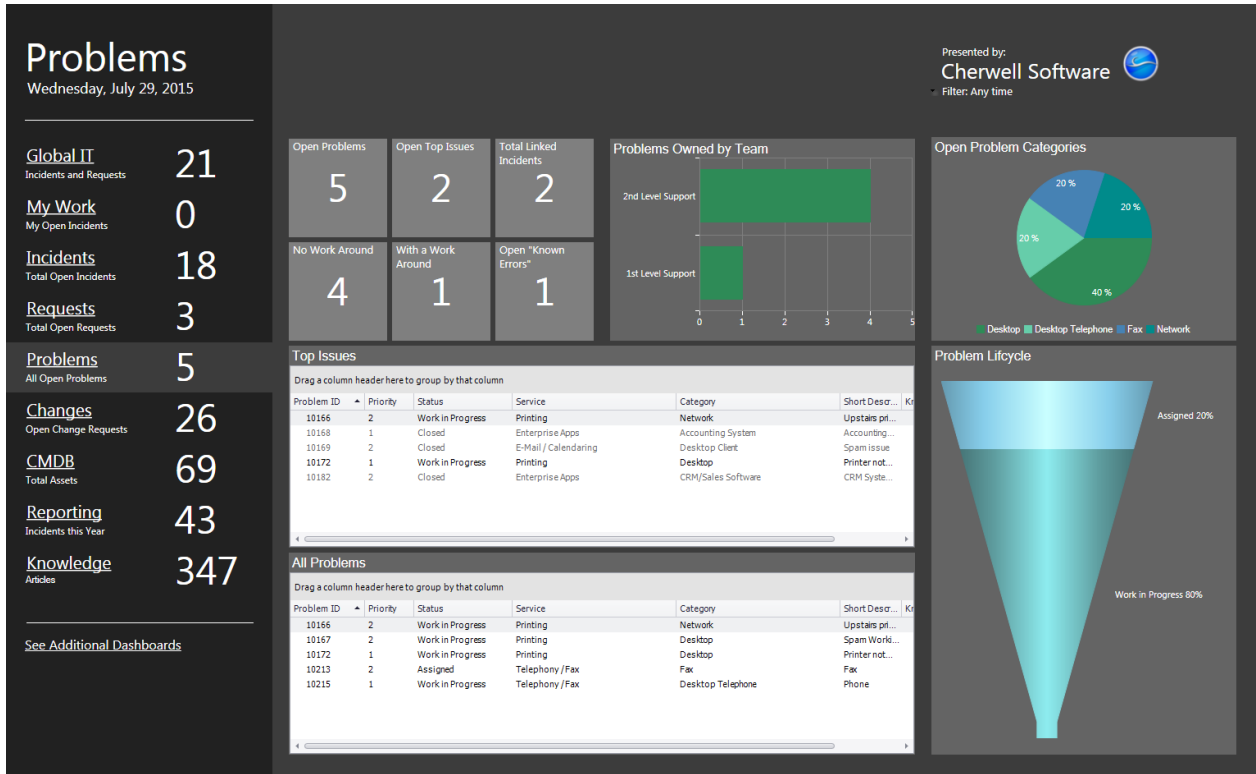


**Note:** History Journals are automatically created by CSM. Notes are manually created.

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 a 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 Search Group

Item	Description	Widget Type	Widget Name	Widget Uses:
Open Top Issues	Number of open Problems (Status does NOT = Resolved or Closed) visible in the Portal.	Text Gauge	Top Issues Count	Problems Set as Top Issues Search Group
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 Search Group
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 Search Group
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 Search Group
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 Search Group
Problems Owned by Team	Percentage of open Problems (Status does NOT = Resolved or Closed) based on Team ownership.	Bar Chart	Problems by Teams	Open Problems Search Group 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 all Problems that are visible in the Portal.	Search Results List	Global Issues	All Top Issues Search Group.
All Problems	List of all open Problems (Status does NOT = Resolved or Closed).	Search Results List	All Problems	Open Problems Search Group.

# 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
<b>Status</b>			
Alt 1 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:	Problem	Problem Form, Next: <Status>
Alt 2 Step from Relationship			
Next Step from Relationship			
	<ul style="list-style-type: none"> <li>• Begin Work: Start Work in Progress One-Step Action.</li> <li>• Set as Resolved: Set as Resolved One-Step Action.</li> <li>• Pending Change: Set to Pending Change One-Step Action.</li> <li>• Close: Set as Closed One-Step Action.</li> </ul>		
View More Status Options	Allows the User to set any status.	Problem	Problem Form, Next: <Status>
<b>Conditional Status</b>			
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, Quick Info Tile: Set as Pending Change link
Set as Closed	Changes the Problem status to Closed.	Problem	Problem Form, Status: Close link
<b>Form</b>			
<b>Ownership</b>			

Assign to ANY Individual	<p>Prompts the User to assign the record to any CSM User (not limited by Team). Uses Owned By ID and Owned By Team fields.</p> <p>Changes Problem status from New to Assigned.</p>	Problem	Problem Form, Assign To link
Assign to Individual	<p>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.</p> <p>Changes Problem status from New to Assigned.</p>	Problem	Problem Form, Owned By: Select Owner link
Assign to Team	<p>Launches the Choose Team window, where a User can choose an Owned By Team for the record.</p> <p>Changes Problem status from New to Assigned.</p>	Problem	Problem Form, Owned By: Select Team link
Take Ownership	<p>Makes the Current User the Primary User of the record.</p> <p>Changes status from New to Assigned.</p>	Problem	Problem Form, I Want To: Take Ownership link
<b>I Want To</b>			
Publish/Remove Known Error to/from Portal	<p>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.</p>	Problem	Problem Form, I Want To: Publish to Top Issues List in Portal, Step 3: Workaround and Known Error: Publish Known Error in Portal button
Resolve Incidents	<p>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.</p>	Problem	Problem Form, I Want To: Resolve Attached Incidents
Set as Resolved	<p>Changes the Problem status to Resolved.</p>	Problem	Problem Form, I Want To: Set as Resolved

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Update Problem Status	Prompts the User to select a status, and then changes the Problem status.	Problem	Problem Form, I Want To: View More Status Options
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A full list of One-Steps 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-Steps associated with a particular type of Business Object.

# Problem Search Groups

CSM provides numerous OOTB Problem [Search Groups](#). Notable Problem Search Groups include:

Search Group	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	Search Group
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).

## 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 CMDB that are managed to avoid disruptions to Services. Use Configuration Items to track and monitor:

- 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 (ex: A CI System for the e-mail 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 (ex: Printer) help to create, manage, and track CIs:

**Printer**  
Status: **Active**  
Next: Bring Down

**Open Incidents** 1

Primary User:  
Gina Mehra  
(719) 386-7000  
Gina.Mehra@RiverTCorp.com

Owned By: Assign To...  
Henri Bryce  
3rd Level Support  
833-898-8787  
henri.bryce@RiverTCorp.com

I Want To:  
Take Ownership  
View Detailed Date/Time Information  
Create a New...  
View the CI/Network Map

**Details**

Asset Tag: 4149 [New]  
Printer Type: Network Printer Manufacturer: Hewlett-Packard  
Model: LaserJet 3600 Serial Number: 193756582526  
SLA: [ ] Critical  
Drive Space: Total Pages: 125,000

Building: A Floor: 2 Room: Conference  
Barcode: TX4150  
Description: Main printer for use by anyone in the office

**Network**

MAC: 9D:02:04:84:4F:40 IPv4 Address: 10.10.2.10  
Friendly Name: main-printer Host Name: main-printer IPv6 Address: 0:0:0:0:fff:a0a:20a

Tiered Alerts (Current Alert Level: 0/0) | Baseline Changes | Journals | Contracts | Incidents | SLA | CI Users | Problems | Change Request | Upstream CIs | Downstream CIs | Other Configuration Items | Services

Record 1 of 2 | View

Incident...	Status	Priority	Owned By	Description
100954	Closed	2	Sawyer Watson	Having troubles printing work orders on main printer.
100957	Reopened	3	Sawyer Watson	Unable to print to the network printer. Tried multiple times

1. The Main Pane displays detailed CI information based on the type of CI, such as location and network information.
2. The Quick Info Tile displays important at-a-glance information based on the type of CI, such as the Status alert bar (current and next status), Open Incidents alert bar, Primary User, asset ownership, and common operations (I Want To section).
3. The Form Arrangement dynamically displays linked child records based on the type of CI, such as Journals, Incidents, and Problems.

# CMDB Features and Capabilities

CSM CMDB has several features and capabilities:

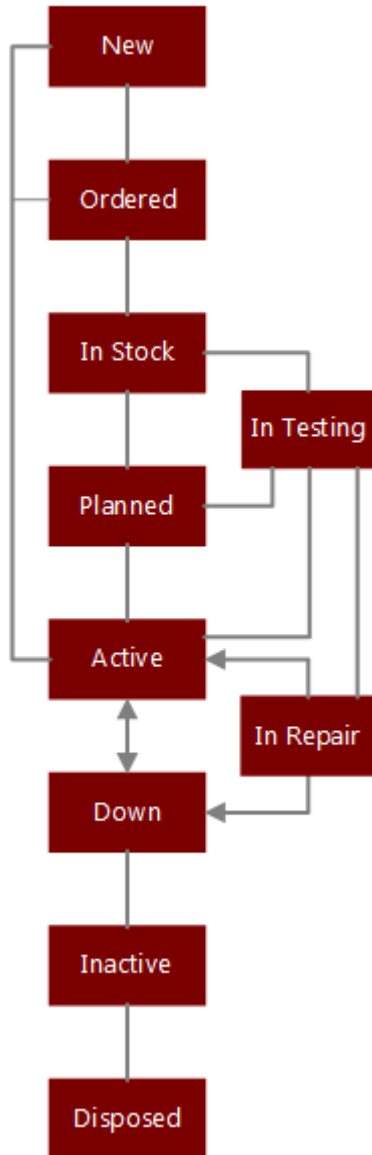
- **Searching:** Quickly locate all CIs by running a [Quick Search](#), or search for a particular CI or set of CIs by refining the search criteria to a word/phrase, timeframe, Customer, etc. Use [Search Group](#) to save/run commonly-run Searches.
- **Search Groups:** Use [CI Search Groups](#) to quickly 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 Config Item Business Object to track CIs, and then configure the Business Object to capture/track only what you want.
- **Forms:** Use the powerful Config Item Forms to create, edit, and track CIs. The form provides a Quick Info Tile to display important at-a-glance information (CI type, status alert bar (current and next status), Open Incidents alert bar (with threshold colors), Primary User, [asset owner](#), common operations (I Want To section), and an 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 a CI Event, Installed Service, 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 e-mail 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), e-mail 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 e-mails 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..

# Configuration Item Workflow

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.



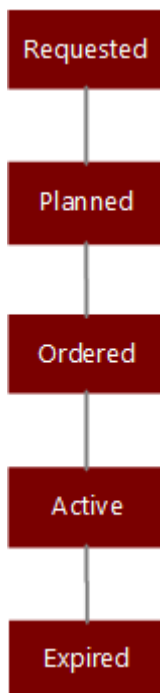
**Note:** Access additional statuses (Stolen/MIA, In Repair, In Testing, etc.) at any time via the View More Status options link (I Want To section of the Quick Info Tile).



A CI progressing through the Hardware CI workflow encounters the following 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 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 CMDB interface is a tool that allows you to quickly manage Configuration Item (CI) records. Use the CMDB interface to:

- 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**.
- From a Business Object record, click the **CI Selector** button .
- From the Configuration Items tab in a [Form Arrangement](#), click the **Link** button .

**Configuration Management Database**

Configuration Items to show:  1

Show Config Items for All Customers

Show Config Items for Customer:

Search:  2

Changed:

Drag a column header here to group by that column

CI Type	Asset Tag	HostName	IPAddress	Manufacturer	Model	Location - Floor
✓ Config - Comput	4394	eric-desk	10.10.2.113	Dell	OptiPlex 9010 Desktop	0
✓ Config - Comput	4395	christine-desk	10.10.2.114	Dell	OptiPlex 9010 Desktop	1
✓ Config - Comput	4396	jose-lap	10.10.2.115	Dell	Latitude E5530 Laptop	1
✓ Config - Comput	4397	steve-lap	10.10.2.116	Dell	Latitude E5530 Laptop	3
✓ Config - Comput	4398	steve-desk	10.10.2.117	Dell	OptiPlex 9010 Desktop	3
✓ Config - Comput	4399	tom-desk	10.10.2.118	Dell	OptiPlex 9010 Desktop	1
✓ Config - Comput	4400	klein-lap	10.10.2.119	Dell	Latitude E5530 Laptop	1
⚠ Config - Comput	4401	molly-desk	10.10.2.120	Dell	OptiPlex 9010 Desktop	2
✓ Config - Comput	4402	michael-desk	10.10.2.121	Dell	OptiPlex 9010 Desktop	2
✓ Config - Comput	4403	eric-lap	10.10.2.122	Dell	Latitude E5530 Laptop	4
✓ Config - Comput	4404	marci-desk	10.10.2.123	Dell	OptiPlex 9010 Desktop	1
✓ Config - Comput	4405	amy-desk	10.10.2.124	Dell	OptiPlex 9010 Desktop	1
✓ Config - Comput	4406	montell-lap	10.10.2.125	Dell	Latitude E5530 Laptop	3
✓ Config - Comput	4407	susanm-desk	10.10.2.126	Dell	OptiPlex 9010 Desktop	2

3



1. Filters: View all CI records, or filter by CI Type (ex: Computer, Printer, etc.), Customer (ex: All or named Customer), and/or timeframe (ex: Anytime, Today, Previous Month, etc.).
2. Search: Search for a specific CI record (ex: Search any searchable field, such as Asset Tag, Host name, etc.).

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

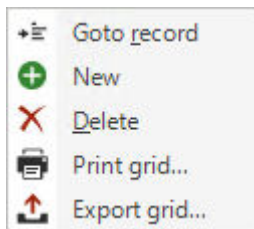
## Menu Bars and Toolbars

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.
New	Creates a new CI record.
Delete	Deletes the selected CI record.
Print Grid	Prints the active Grid.
Export Grid	Exports the active Grid to a file.
<b>Tip:</b> If Context Menu Actions are defined, an Actions menu item is also displayed to run Actions.	

## Record Views

There are two views available for the CMDB interface:

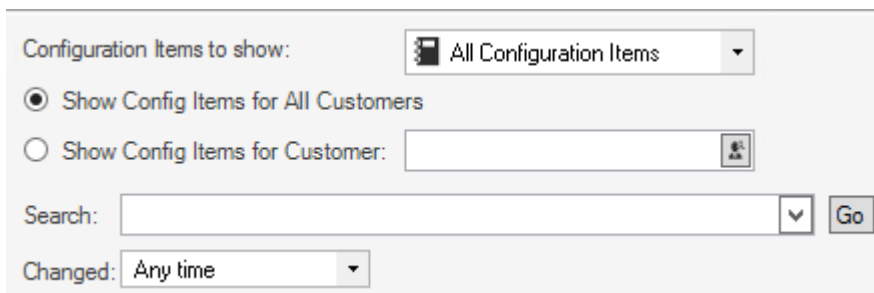
- Grid list: Select the **Show Results** button   on the toolbar to display a Grid list of CI records.
- Current record: Select the **Show Current Record** button   on the toolbar to display the selected CI record.

## Grid Capabilities

When CI records are displayed in Grid view, use the CSM Grid capabilities (ex: 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 (ex: Computer, Printer, etc.), Customer (ex: All or named Customer), and/or timeframe (ex: Anytime, Today, Previous Month, etc.). To search, type a **value** to search in the Search box (ex: Asset tab, host name, etc.), and then click **Go**.



The screenshot shows a search and filter interface for Configuration Items (CI). It includes the following elements:

- Configuration Items to show:** A dropdown menu currently set to "All Configuration Items".
- Customer Selection:** Two radio buttons. The first, "Show Config Items for All Customers", is selected. The second, "Show Config Items for Customer:", is followed by an empty text input field and a small icon.
- Search:** A text input field with a dropdown arrow on the right and a "Go" button.
- Changed:** A dropdown menu currently set to "Any time".

# Creating Configuration Item (CI) Records

The 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.

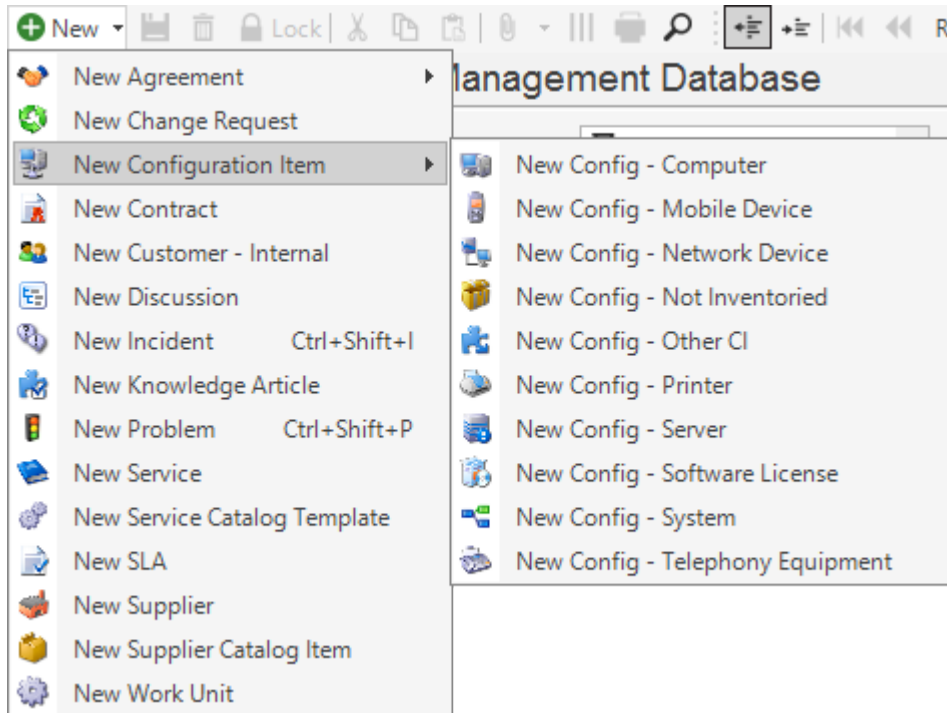


## Create a Configuration Item (Printer)

Hardware and Software Forms vary based on the specific Configuration Item. The following procedure provides steps for creating a Printer CI.

### 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. This can be an auto-generated Asset tag or a value provided by the system administrator.

Details			
Asset Tag:	<input type="text" value="4476"/>	<input type="button" value="New"/>	Building:
Printer Type:	Manufacturer:	Floor:	Room:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>






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

2. Select a **Primary User** in the Quick Info Tile:

- 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, avatar, e-mail, and phone number. 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 an external Customer, technician, or internal User of an asset. In CMDB, the Customer is referred to as the Primary User.

**Tips:** Wildcards (ex: % or \*) can be used when searching. If the Customer is a VIP, a VIP icon  appears beside the name. To browse for a Customer or add a new Customer Record, click the **Customer Selector** button  to launch the [Contact Manager](#). To add an alternate phone number or e-mail address, click the **Alternate Contact Info** link. To view the selected Requestor's detailed Customer Record, click the **Quick View** button .

3. Assign an Owned By (ex. IT) to the CI by clicking one of the ownership links in the Quick Info Tile (Owned By or I Want To sections):

- Take Ownership: Click this **link** to make yourself the Owned By User.
- Assign to: Click this **link** to select an Owned By User. The Team owner is populated by the User's default Team.
- Select Owned By (User): Click the **link** to first select a Team, and then an Owned By User (User is limited by Team).
- Select Owned By Team: Click this **link** to first select an Owned By Team.

**Owned By:**

- [select owner](#) -
- [select team](#) -
- no phone on record -
- no e-mail on record -

**I Want To:**

[Take Ownership](#)

[View Detailed Date/Time Information](#)

[Create a New...](#)

[Vizualize CI/Network Map](#)

[Activate this CI](#)

[View more status options](#)

4. The CI owner records the initial CI details (ex: Details and Network sections of the Config - Printer Form).

**Details**

<p>Asset Tag:  <input type="text" value="4458"/> <input type="button" value="New"/></p> <p>Printer Type: <input type="text"/> <input type="button" value="v"/> Manufacturer: <input type="text"/> <input type="button" value="v"/></p> <p>Model: <input type="text"/> <input type="button" value="v"/> Serial Number: <input type="text"/></p> <p>SLA: <input type="text"/> <input type="button" value="v"/> <input type="checkbox"/> Critical</p> <p>Drive Space: <input type="text"/> Total Pages: <input type="text" value="0"/></p>	<p>Building: <input type="text"/></p> <p>Floor: <input type="text"/> Room: <input type="text"/></p> <p>Barcode: <input type="text"/></p> <p>Description: <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> <input type="button" value="v"/></p>
---	--

**Network**

<p>MAC: <input type="text"/></p> <p>Friendly Name: <input type="text"/></p>	<p>IPv4 Address: <input type="text"/></p> <p>Host Name: <input type="text"/></p> <p>IPv6 Address: <input type="text"/></p>
---	--

**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**.



**Note:** Consider providing a Friendly Name for each CI. This Field is used by other Business Objects (ex: Incident and Change) when linking to the record. In some cases, the CI cannot be linked without the Friendly Name.

5. The asset owner orders the CI:
  - a. In the Status alert bar, click **Order**.



The CI status changes to Ordered.

6. When the CI is received, the asset owner identifies the CI as in stock:
  - a. In the Status alert bar, click **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** under I Want To. 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 I Want To section of the Quick Info Tile to access the CI Status Selector, and then select the **Stolen/MIA** status.

7. Owner plans the use and location of the CI:
  - a. In the Status alert bar, click **Planned**.



The CI status changes to Planned.

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

8. When ready, owner activates the CI:
  - a. In the Status alert bar, click **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 I Want To section of the Quick Info Tile. The status changes to In Repair.

9. (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 Status alert bar, click **Bring Down**.



The status changes to Down, and the Status alert bar turns red.



**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.

10. (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 I Want To section of the Quick Info Tile, click the **View More Status Options** link.

The CI Status Selector opens.

b. Click the **Retired** status.

c. Click **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](#), etc.
- **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.
- **E-mail:** Change the e-mail templates that are used to create the e-mails sent by One-Step Actions or Automation Processes. Or, disable/change when and to whom notifications are sent (ex: Send a notification to a computer owner whenever their CI Record changes).
- **Field Value Options:** Use Table Management to add/edit Lookup Object values for use in drop-downs (ex: 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.

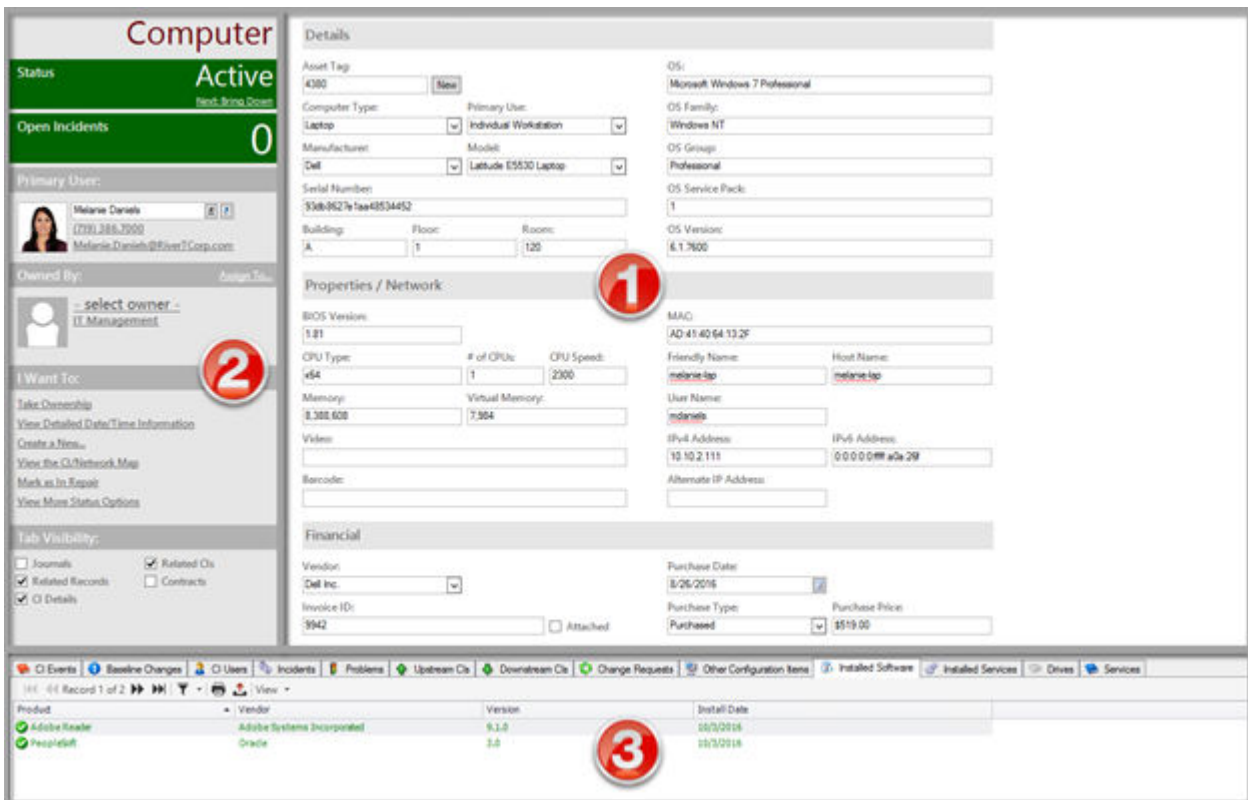
## CMDB Features

CSM provides the following tools to help manage the CMDB:

# CMDB Forms

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

1. The Main pane displays detailed CI information based on the type of CI, such as location and network information.
2. The Quick Info Tile displays important at-a-glance information based on the type of CI, such as the CI type, Status alert bar (current and next status), Open Incidents alert bar, primary User, record ownership, and common operations (I Want To section).
3. The Arrangement dynamically displays linked child records based on the type of CI, such as Journals, Incidents, and Problems.



The following table describes common fields on the CI Form:



Field	Description	Comments
<b>Quick Info Tile</b>	Important at-a-glance information based on the type of CI, such as the CI type, Status alert bar (current and next status), Open Incidents alert bar, primary User, record ownership, and common operations (I Want To section).	
[CI]	Record Type.	CSM automatically assigns the Record Type based on the type of record created (New>New Configuration Item>New Config - "CI").
<b>Status alert bar</b>	Current and next status of the CI as it progresses through the CI workflow.	Unlike other records, the CI only uses statuses (not phases).
<b>Open Incidents alert bar</b>	Displays the number of Open Incidents linked to the CI.	
<b>Primary User</b>	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	<p>Name of the Primary User who uses the CI. The User assigned the asset by the organizational owner (see Owned by).</p> <p>Provide a name in the Primary User field (ex: Gina), and then press <b>Enter</b> or <b>Tab</b> to locate the Customer Record.</p> <p><b>Note:</b> 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.</p>	After you select a Primary User, the Photo, Phone, and E-mail fields are auto-populated with information from the Customer Record.

Field	Description	Comments
Avatar	Avatar (photo or image) of the Customer (Primary User).	The Avatar, Phone, and E-mail fields are auto-populated with information from the Primary User's Customer Record.
E-mail	E-mail address of the Customer (Primary User) who uses the CI.	
Phone	Phone number of the Customer (Primary User) who uses the CI.  Click the link to dial the Customer (Primary User) if telephony is configured.	
<b>Owned By</b>	Record owner. Owned by refers to the team or group responsible to the organization for the asset. This defaults to the person creating the record and can be the manager of the group assigned responsibility for the asset. The person assigned to the asset itself would be the Primary User.	The owner is automatically assigned to the creator. This should be viewed as the person within an organization who is responsible for the asset. The Owned By person assigns the asset to the Primary User.
Assign to	Click the <b>link</b> to select a Primary User for the CI. 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.
User Owner -select owner-	Name of the Owned By User. Click the <b>link</b> to first select a Team and then a Owned By User owner (User is limited by Team).	One-Step Action (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.
Team Owner -select team-	Name of the Owned By Team. Click the <b>link</b> to select a Team owner.	One-Step Action (Assign to Team):  Launches the Choose Team window, where a User can choose an Owned By Team for the record.
Avatar	Photo/graphic associated with the User owner (from User profile).	
<b>I Want To</b>	Common operations (initiate Actions/ One-Step Actions).	

Field	Description	Comments
Take Ownership	Click the <b>link</b> 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.
View Detailed Date/Time Information	Click the <b>link</b> to open the Information window, where you can view created date and time, creator name, and last edited date and time. Time Date/time format is MM/DD/YYYY HH:MM.	One-Step Action (Date Time Info Popup): Displays details for all the date/timestamps to give a historical view.
<b>Main Pane</b>	Displays detailed CI information.	Fields in the Main pane vary based on the type of CI. These fields are completely customizable and configurable.
Details	General CI details. Complete the necessary information. No fields are required.	For example, the Computer CI uses Asset Tag, Manufacturer, Serial Number, Operating System information, etc.
Properties/ Network	Component details. 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.

# CMDB Tiered Alerts

Tiered Alerts are tools used to manage CI behaviors when a defined event occurs (ex: 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.

The screenshot displays two main components:

- Tiered Alert Configuration:** A pop-up window titled "Tiered Alert" with a red border. It contains:
  - Alert Order:** A dropdown menu set to "1".
  - Alert Action:** A text field containing "Send E-mail" and a small icon.
  - Wait time from previous alert:** A text field with the value "First alert occurs immediately."
- Printer Record:** A record card for a printer.
  - Status:** A red bar at the top indicates the status is "Down" with a "Next: Activate" link.
  - Open Incidents:** A green bar shows "0" incidents.
  - Primary User:** Andrew Simms, (719) 386.7000, andrew.simms@rivercorp.com.
  - Owned By:** Gina Mehra, IT Management, 833-898-7381, gina.mehra@rivercorp.com.
  - I Want To:** A section with an email icon, indicating an alert action.
  - Details:**
    - Asset Tag:** 4149 (New)
    - Printer Type:** Network Printer
    - Manufacturer:** Hewlett-Packard
    - Model:** LaserJet 3600
    - Serial Number:** 193756582526
    - SLA:** (empty)  Critical
    - Drive Space:** (empty)
    - Total Pages:** 125,000
    - Building:** A
    - Floor:** 2
    - Room:** Conference
    - Barcode:** TX4150
    - Description:** Main printer for use by anyone in the office
    - Network:**
      - MAC:** 9D:02:04:84:4F:40
      - IPv4 Address:** 10.10.2.10
      - IPv6 Address:** 0:0:0:0:ffff:a0a:20a
      - Friendly Name:** main-printer
      - Host Name:** main-printer

## Good to know:

- Tiered Alerts are available for the following CI Records: Network Device, Printer, System, Telephony Equipment, and Other CI.
- Tiered Alerts require an Automations Process to define the event (ex: 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.

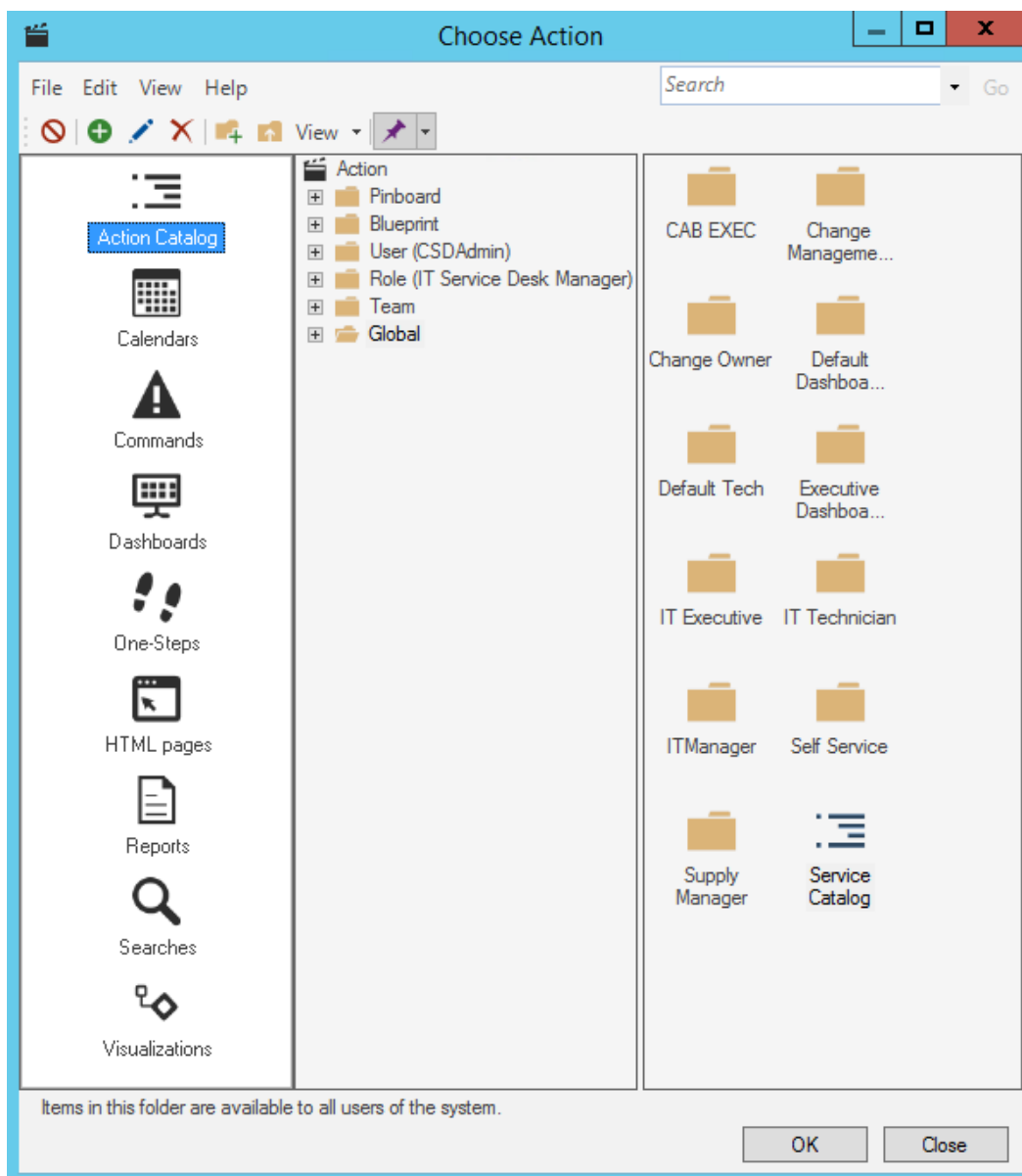
The Tiered Alert form opens.



The screenshot shows a web form titled "Tiered Alert". It contains three main sections: "Alert Order:" with a spinner control showing the value "0"; "Alert Action:" with a text input field and an "Action Selector" button (represented by a small icon of a document with a list); and "Wait time from previous alert:" which is currently empty.

4. Define the first tier:
  - a. Alert Order: Click the **Up arrow** to select the tier level (ex: 1).
  - b. Alert Action: Select a **Command**, **Action**, or **One-Step Action** to take place when the Tiered Alert is initiated (ex: 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 (ex: Send E-Mail Command).
- iii. Click **OK**.

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

### Tiered Alert

Alert Order:  
 

Alert Action:  
 

Wait time from previous alert:  
*First alert occurs immediately.*

**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 (ex: 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 (ex: New Incident One-Step Action).
- iii. Click **OK**.

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

### Tiered Alert

Alert Order:  
 

Alert Action:  
 

Wait time from previous alert:  
 

- 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 (ex: 2).

### Tiered Alert

Alert Order:  
2

Alert Action:  
New Incident

Wait time from previous alert:  
2

- ii. In the second field, click the **drop-down** 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 Being Repaired	Displays the number of CIs with an Asset Status of In Repair.	Text Gauge	CI in Repair	Custom Search Group
CIs Currently Down	Displays the number of CIs with an Asset Status of Down.	Text Gauge	Current Down CIs	CIs Currently Down Search Group
CIs that are New	Displays the number of CIs with an Asset Status of New.	Text Gauge	New CIs	Custom Search Group
Events by CI	Displays the number of Events by Vendor.	Bar with Line Chart	CI Events vs. New CIs	All Events Search Group, All Assets Search Group

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 Search Group
Total CMDB Assets	Displays the number of assets based on type.	Text Gauge	<p>Uses the following Widgets:</p> <ul style="list-style-type: none"> <li>• CMDB Computers in last 30 days</li> <li>• CMDB Network Devices in last 30 days</li> <li>• CMDB Printers in last 30 days</li> <li>• CMDB Telephony in last 30 days</li> <li>• Copy of Mobile in CMDB</li> <li>• Copy of Servers in CMDB</li> <li>• Other CIs in CMDB</li> <li>• Software in CMDB</li> <li>• System in CMDB</li> </ul>	<p>Uses the following Search Groups:</p> <ul style="list-style-type: none"> <li>• All Computers</li> <li>• All Network Devices</li> <li>• All Printers</li> <li>• All Telephony Equipment</li> <li>• All Mobile Equipment</li> <li>• All Server Equipment</li> <li>• All Other CIs</li> <li>• All Software</li> <li>• All System CIs</li> </ul>
Filter	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
<b>Status</b>			
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			
<b>Form</b>			
<b>Ownership</b>			
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 (I Want To section)
<b>Other</b>			
DateTime Info Popup	Displays details for all the date/timestamps to give a historical view.	[CI]	CI Form: View Detailed Date/Time Information link (I Want To section)
Create a new...	Prompts the User to create a new Incident, Problem, or Change. <b>Note:</b> This One-Step Action is only applicable for hardware CIs.	[CI]	CI Form: Create a new... link (I Want To section)

A full list of One-Steps 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-Steps associated with a particular type of Business Object.

The schema document is also available on the [Customer Support Portal](#). In the [Customer Support Portal](#), go to the Release Notes tab, and select Cherwell Service Management. Select the version of CSM you are running to find the schema document you need.

# CMDB Search Groups

CSM provides the following OOTB CI [Search Groups](#):

Search Group	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	Search Group
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

# 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 mergeable application ([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.
- 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 e-mail server because several employees are unable to access e-mail (Emergency Change).




**Note:** This feature is now available as a mergeable application ([mApp Solution](#)).


# Change Good to Know

- Search for one or more Changes that meet a specific criteria by running a [Quick Search](#) or [Search Group](#).
- Create a new Change by clicking **New > New Change Request** on the [CSM Desktop Client toolbar](#) or **File > New > New Change Request** from the [CSM Desktop Client menu bar](#).
- The Main Pane for Normal and Emergency Changes toggles between two embedded forms: a simple Step View form and a detailed Expanded View form that displays all Change information in a single form.
- View additional form information and helpful tips by clicking the **INFO** button located on the title banner of the form.
- CSM implements several OOTB Actions/One-Step Actions to make Change 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).

- CSM provides several OOTB Automation Processes to automate Change Management. For more information, see the [Automation Process documentation](#).
- If enabled (via an Automation Process), e-mail notifications are automatically created and sent to stakeholders. For example:
  - A Customer to notify her of a status change.
  - Team owners to notify them of ownership.
  - The User owner to notify him of the ownership.
  - Approvers when a Change requires approval.
- 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 Customer's e-mail address in the Requestor section of the Quick Info Tile. If sent using the File menu, the e-mail is blank. If sent using the Quick Info Tile, an e-mail template is used to auto-populate the e-mail with information from the current Change (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 Quick Info Tile displays important at-a-glance information:
  - The Type bar displays whether the Change is Standard, Normal, or an Emergency.
  - The Status bar displays the current status of the Change as it moves through its workflow.

- The Priority bar displays the Change priority as either Low, Normal, High, or Urgent.
- The Owned By section displays the current [record owner](#) (oneself, a User, or a Team). Changes must be assigned to an owner, and can be assigned by clicking one of the ownership links in the Quick Info Tile.
- The workflow bar (top of Main Pane) indicates the current phase of the Change as it moves through its [workflow](#). Dark gray indicates the current phase.
- Clicking Show All Tabs on the Quick Info Tile displays all Forms in the Arrangement area, whether or not they hold information related to the Change. Clicking Show Related Tabs displays Forms with information related to the Change.
- Fields:
  - Many fields with drop-downs 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, click 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, some are required to "close" the record, etc. You will be reminded when fields are required, either by a red box around the field or by a reminder message.
  - 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, click the **Zoom** button .
  - Some validated fields can recognize what you are typing and will suggest a value for you (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.
  - Clicking 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 (Arrangement area).

## Change Advisory Boards (CABs)

Normal and Emergency Change Requests require at least one [Approval](#) by a Change Advisory Board. CSM uses two OOTB boards, including:

- 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.

# Creating a Change Advisory Board

Complete the following procedures to configure the CAB. 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 OOTB [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 by clicking Create a New Blueprint>Change Request>Edit Approvals.

# 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.

Change Advisory Board		
Table	Selections	Comments
<b>CAB Member Name:</b>		Member names come from a UserInfo table that is set up when identifying CSM Users.
<b>Change Type</b>	<ul style="list-style-type: none"> <li>• Emergency</li> <li>• Normal</li> <li>• Standard</li> </ul>	Defined using the Change Type Lookup Table in <a href="#">Table Management</a> .
<b>Role</b>	<ul style="list-style-type: none"> <li>• Business Analyst</li> <li>• Change Manager</li> <li>• Developer</li> <li>• End-User</li> <li>• Financial Analyst</li> <li>• Project Manager</li> <li>• Project Team Member</li> <li>• Sponsor</li> <li>• Stakeholder</li> <li>• Technical Analyst</li> <li>• Tester</li> </ul>	Defined using the CAB Role Lookup Table in <a href="#">Table Management</a> .
<b>Approval Phase</b>	<ul style="list-style-type: none"> <li>• Assessment Phase</li> <li>• Implementation Phase</li> </ul>	By default, Standard Changes do not require an Approval, but you can define an Approval Process in CSM Administrator (Create a Blueprint>"Business Object">Edit Approvals), if necessary.

# Define Change Advisory Board Members

Use the following procedure to define CAB members.

## To define a CAB member:

1. On the [CSM Desktop Client menu bar](#), click **Tools>Table Management**.



**Note:** By default, you must be a Service Desk Level 2 or higher to view Table Management.

2. Click the **Type** drop-down, and then select **Standing CAB Member**.

The Standing CAB Member grid opens.

3. Click the **New** button .

The Standing CAB Member form opens.

**Note:** The following fields are driven by a Lookup Table. If you have [security rights](#), use Table Management (Tools>Table Management) to add, edit, or delete field values.

- a. Click the **Change Type** drop-down, and then select a **Change type** (ex: Normal).
- b. Click the **Member Name** drop-down, and then select a **User** (ex: Andrew).
- c. Click the **Role** drop-down, and then select a **role** for the User (ex: Change Manager).
- d. Select the **phase** in which the User can vote:
  - Assessment Phase
  - Implementation Phase

**Note:** CSM provides three OOTB [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 by clicking **Create a New Blueprint>Change Request>Edit Approvals**.

4. Click **Save** .

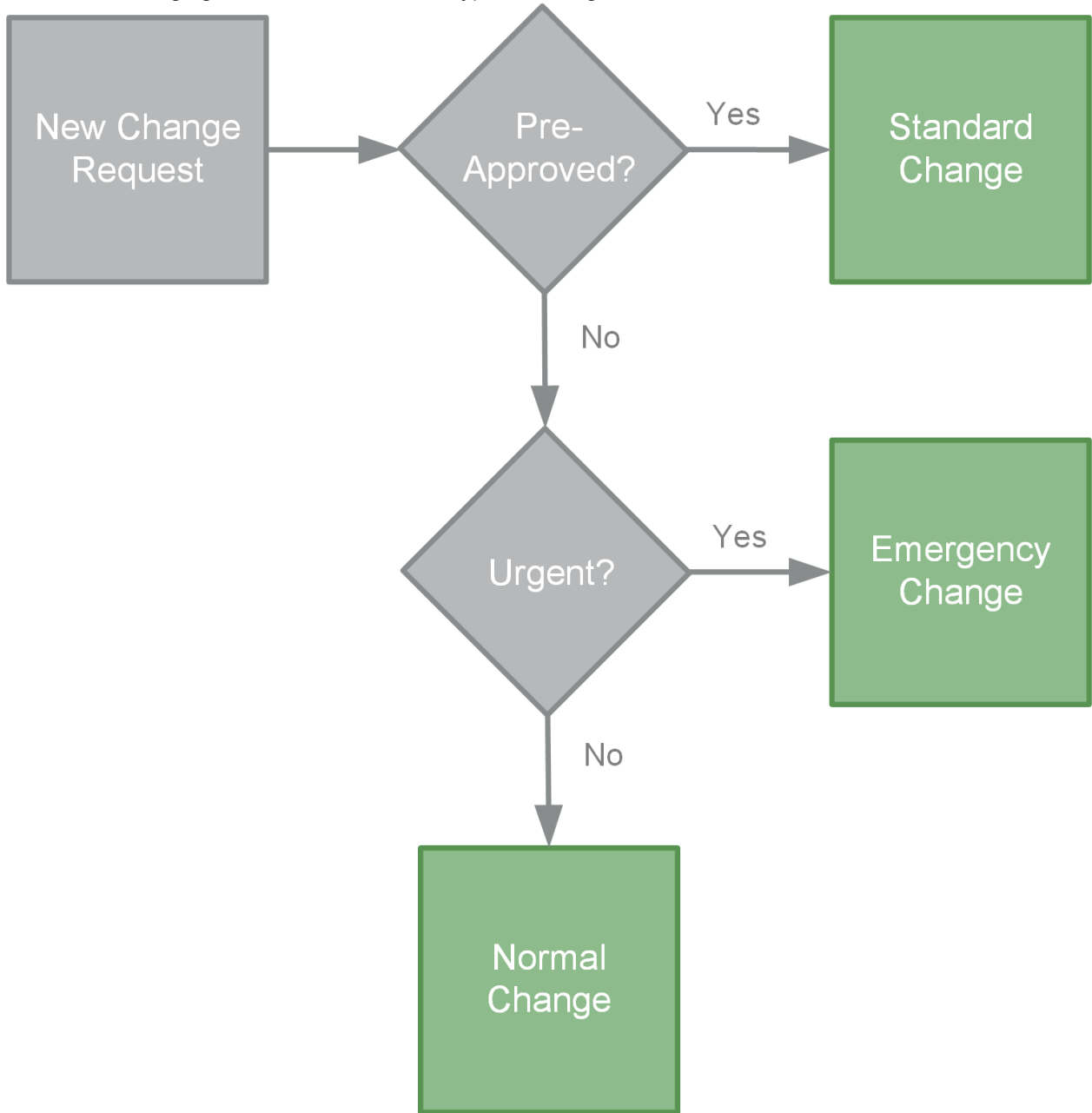
# Change Workflow

CSM provides three workflows based on the different types of Change, including:

- [Standard Change Request workflow](#):
  - [Log a Standard Change](#): Typical step-by-step instructions for logging a Standard Change.
  - [Log a Standard Change - Detailed](#): Detailed step-by-step instructions for logging a Standard Change, including tips, optional steps, and behind-the-scenes information.
- [Normal Change Request workflow](#):
  - [Log a Normal Change](#): Typical step-by-step instructions for logging a Normal Change.
  - [Log a Normal Change - Detailed](#): Detailed step-by-step instructions for logging a Normal Change, including tips, optional steps, and behind-the-scenes information.
- [Emergency Change Request workflow](#):
  - [Log an Emergency Change](#): Typical step-by-step instructions for logging an Emergency Change.
  - [Log an Emergency Change - Detailed](#): Detailed step-by-step instructions for logging an Emergency Change, including tips, optional steps, and behind-the-scenes information.

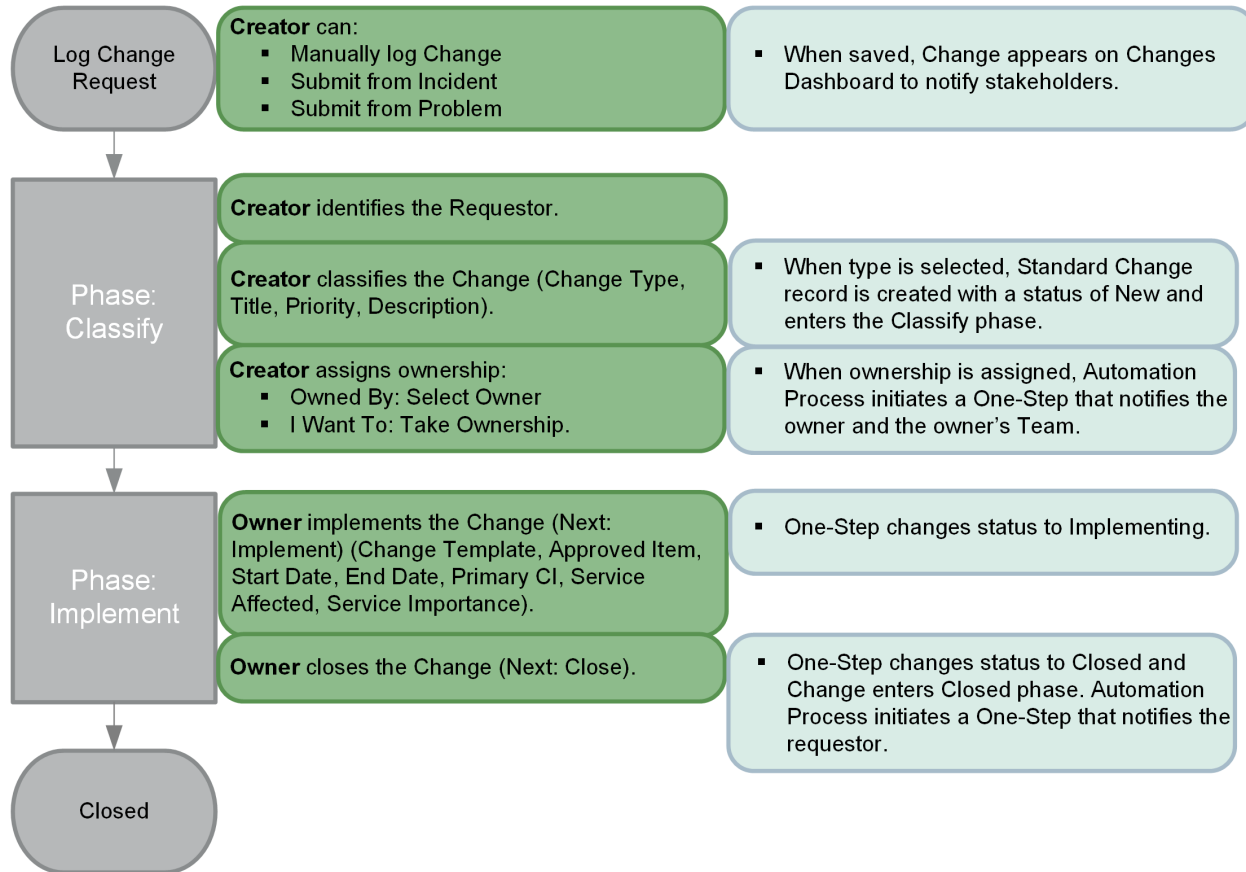


Use the following figure to determine which type of Change workflow to follow.



# Standard Change Workflow

CSM provides a unique OOTB workflow for Standard Changes.



**Note:** CSM uses several features to manage the Change workflow (ex: The Change form helps create, manage, and track Changes, One-Step Actions help move the Change through its workflow, Automation Processes notify stakeholders via e-mails, an Approval process enforces Approvals, a Change Dashboard notifies stakeholders and tracks metrics, etc.).

## Contributors

A Standard Change typically has several contributors. Depending on your workflow and the size of your company, many of these contributors may have 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.

## Phases

The Standard Change workflow is divided into the following phases:

1. **Classify:** Creator logs a new Change, and then identifies the requestor. Creator classifies the Change by defining the type, title, priority, and description. Creator assigns ownership.
2. **Implement:** Creator implements the Change by defining the template, approved item, proposed start date, proposed end date, primary CI, Service, and Service importance. Creator closes the Change.

## Statuses

A Standard Change progressing through the workflow encounters the following statuses:

1. **Classify:** Change is created, a requestor is identified, the Change is classified, and ownership is assigned.
2. **Implementing:** Change is implemented, and then closed.
3. **Closed:** Change is closed.

# Log a Standard Change

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

## To manually log a Standard Change:

1. On the CSM toolbar, click **New > New Change Request**.

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

2. Creator selects a **Requestor** (if different from the creator):
  - a. Requestor: 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 Requestor fields are auto-populated with the Customer's name, avatar, e-mail, and phone number. If multiple matches are found, the Contact Manager opens so that you can select the appropriate Customer.

3. Creator classifies the Change:
  - a. Change Type: In the drop-down, select **Standard**.


The Standard Change form opens.

**Note:** The Change automatically enters the Classify phase with a status of Classify.

- b. Complete the Classify/Assess section:
    - i. Change Title: Specify a **title** for the Change.
    - ii. Priority: Click the **Priority** drop-down to reveal the Priority Matrix, and then select a **priority** based on its impact and urgency.



The Priority alert bar indicates the priority.

- iii. Description: Specify a **description** for the Change.

**Tip:** Description is a **Rich Text** field. To format the text or embed an image, click the **Zoom** button .

4. Creator assigns an Owner to the Change by clicking one of the Ownership links in the Quick Info Tile (*Owned By* and *I Want To* sections). Ownership is required:
  - Take Ownership: Click this **link** to make yourself the User Owner.
  - Assign to: Click this **link** to select a User Owner. The Team Owner is populated by the User Owner's default Team.
  - Select Owner (User): Click this **link** to first select a Team and then a User Owner (User is limited by Team).
  - Select Team: Click this **link** to first select a Team Owner.
5. Owner implements the Change:
  - a. In the Status bar, click the **Next: Implement** link.


The status changes to Implementing and the Change enters the [Implement phase](#).


- b. Complete the Implement section:
  - i. Standard Change Template: From the drop-down, select a **predefined template**.
  - ii. Standard Change Approved Items: From the drop-down, select a **predefined item** related to the Standard Change Template.
  - iii. Proposed Start Date: Click the **Calendar Date Selector** button  to select a start date for the Change.
  - iv. Proposed End Date: Click the **Calendar Date Selector** button  to select an end date for the Change.
  - v. Planning:
    - View Change Calendar: Click the **View Change Calendar** button to open the Change [Calendar](#).

**Note:** The View Change Calendar button displays when the Proposed Start Date and Proposed End Date fields are populated.

- View Collision Detection: Click the **View Collision Detection** button to open a Configuration Map of the Primary CI.

**Note:** The View Collision Detection button displays when the Primary CI field is populated.

- i. Primary CI: Click the **CI Selector** button  to launch the [CMDB](#) window, where you can select a CI. You can show CIs for any Customer or for a selected Customer.
- ii. Impact Analysis: Click the **Impact Analysis** button to display the Configuration Map of the Primary CI.
- iii. Service Affected: From the drop-down, select the affected **Service**.

**Note:** If a Stop icon  appears next to the Proposed Start Date and/or the Proposed End Date, you are outside of the maintenance window, and you must select an acceptable date.

- iv. Service Importance: This field is auto-populated based on the Service Affected selection. However, you can also type a custom Service Importance value.
- v. Propose New Date: Click the **Propose New Date** button to clear the Proposed Start Date field and Proposed End Date field in order to define new dates.

**Note:** The Propose New Date button displays when the Proposed Start Date and Proposed End Date fields are populated.

- vi. Create Normal Change Request: Click the **Create Normal Change Request** button to log a new [Normal Change](#) from the Standard Change. The title, description, priority, proposed start date, proposed end date, and review date auto-populate with data from the Standard Change.

6. Owner closes the Change.
  - a. In the Status bar, click the **Next: Close** link.

The status changes to Closed, the Form fields are locked as read-only, and the Change cannot be reopened.

# Log a Standard Change - Detailed

The following procedure walks you through the typical steps to log a Standard Change, including tips, optional steps, and behind-the-scenes information. The different contributors are noted in the procedure.

## To manually log a Standard Change:

1. On the CSM toolbar, click **New > New Change Request**.

**Tip:** You can also click **File > New > New Change Request** from the [CSM Desktop Client menu bar](#).

A new Normal Change record is created with a unique Change ID (example: 10920).

**Tip:** The Main Pane displays dynamic embedded forms as you move through the workflow. You can toggle between a simple Step View form and a more detailed Expanded View form.





**Note:** When the Change is first saved, it appears on the Change Dashboard to notify Users of its existence.

2. Creator selects a **Requestor** (if different from the person logging the request) in the Quick Info Tile.
  - a. Requestor: Specify the **name** (example: Amy) 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 Requestor fields are auto-populated with the Customer's name, avatar, e-mail, and phone number. If multiple matches are found (example: multiple Customers named Amy), the Contact Manager opens so that you can select the appropriate Customer.

**Tips:** Wildcards (example: % or \*) can be used when searching. If the Customer is a VIP, a



VIP icon appears beside the name. To browse for a Customer or add a new Customer Record, click the **Customer Selector** button  to launch the Contact Manager. To add an alternate phone number or e-mail address, click the **Alternate Contact Info** link. To view the selected Requestor's detailed Customer Record, click the **Quick View** button .

3. Creator classifies the Change:



**Note:** View additional form information and helpful tips by clicking the **INFO** button located on the title banner of the form.

- a. Change Type: Select **Standard** as the type of Change.

The Standard Change form opens.

The Change automatically enters the Classify phase with a status of Classify.


- b. Complete the Classify/Assess section:
  - i. Change Title: Specify a **title** for the Change (example: Install Screen Capture Software).

- ii. Priority: Click the **Priority** drop-down to reveal the Priority Matrix, and then select a **priority** based on its impact and urgency (example: Low for a support Service that only affects one individual).

The Priority alert bar indicates the priority.

**Note:** Red indicates an Urgent priority, orange indicates a High priority, and green indicates a Normal or Low priority. These values are set in the Change Priority table (Tools>Table Management>Change Priority).

- iii. Description: Specify a **description** for the Change (example: Install Snagit screen capture software for Curtis Parker).

**Tip:** Description is a **Rich Text** field. To format the text or embed an image, click the **Zoom** button .

4. Creator assigns an Owner to the Change by clicking one of the Ownership links in the Quick Info Tile (*Owned By* and *I Want To* sections). Ownership is required:
  - Take Ownership: Click this **link** to make yourself the User Owner.
  - Assign to: Click this **link** to select a User Owner. The Team Owner is populated by the User Owner's default Team.
  - Select Owner (User): Click this **link** to first select a Team and then a User Owner (User is limited by Team).
  - Select Team: Click this **link** to first select a Team Owner.

5. Owner implements the Change:

- a. In the Status bar, click the **Next: Implement** link.

The status changes to Implementing and the Change enters the Implement phase.

- b. Complete the Implement section:

- i. Standard Change Template: From the **drop-down**, select a predefined **template**:

- Preapproved Hardware Install
- Preapproved Patch Install
- Preapproved Software Install

**Tip:** Add, edit, or delete Standard Change Template options using a Lookup Table in Table Management (Tools>Table Management>Change - Standard Template).

- i. Standard Change Approved Items: From the **drop-down arrow**, select a predefined **item** related to the Standard Change Template.

**Tip:** Add, edit, or delete Standard Change Approved Items using a Lookup Table in Table Management (Tools>Table Management>Change - Standard Approval).

- ii. Proposed Start Date: Click the **Calendar Date Selector** button  to select a start date for the Change.



iii. Proposed End Date: Click the **Calendar Date Selector** button  to select an end date for the Change.


iv. Planning:

- View Change Calendar: Click the **View Change Calendar** button to open the Change Calendar.


**Note:** The View Change Calendar button displays when the Proposed Start Date and Proposed End Date fields are populated.

- View Collision Detection: Click the **View Collision Detection** button to open a Configuration Map of the Primary CI.


**Note:** The View Collision Detection button displays when the Primary CI field is populated.

- i. Primary CI: Click the **CI Selector** button  to launch the **CMDB** window, where you can select a CI (example: curtis-desk). You can show CIs for any Customer or for a selected Customer.

The selected CI record appears on the Configuration Items tab (Form Arrangement).

**Tip:** View the selected CI record by clicking the **Quick View** button  or by clicking the record on the Configuration Items tab (in the Arrangement area; if not displayed, click **Show All Tabs**).

- ii. Impact Analysis: Click the **Impact Analysis** button to display the Configuration Map of the Primary CI.
- iii. Service Affected: In the drop-down, select the affected **Service** (example: Employee Support).

**Note:** If a Stop icon  appears next to the Proposed Start Date and/or the Proposed End Date, you are outside of the maintenance window, and you must select an acceptable date.

- iv. Service Importance: This field is auto-populated based on the Service Affected selection (example: Support). However, you can also type a custom Service Importance value.
- v. Propose New Date: Click the **Propose New Date** button to clear the Proposed Start Date field and Proposed End Date field in order to define new dates.

**Note:** The Propose New Date button displays when the Proposed Start Date and Proposed End Date fields are populated.

- vi. Create Normal Change Request: Click the **Create Normal Change Request** button to create a new Normal Change from the Standard Change. The title, description, priority, proposed start date, proposed end date, and review date auto-populate with data from the Standard Change.

6. Owner closes the Change.

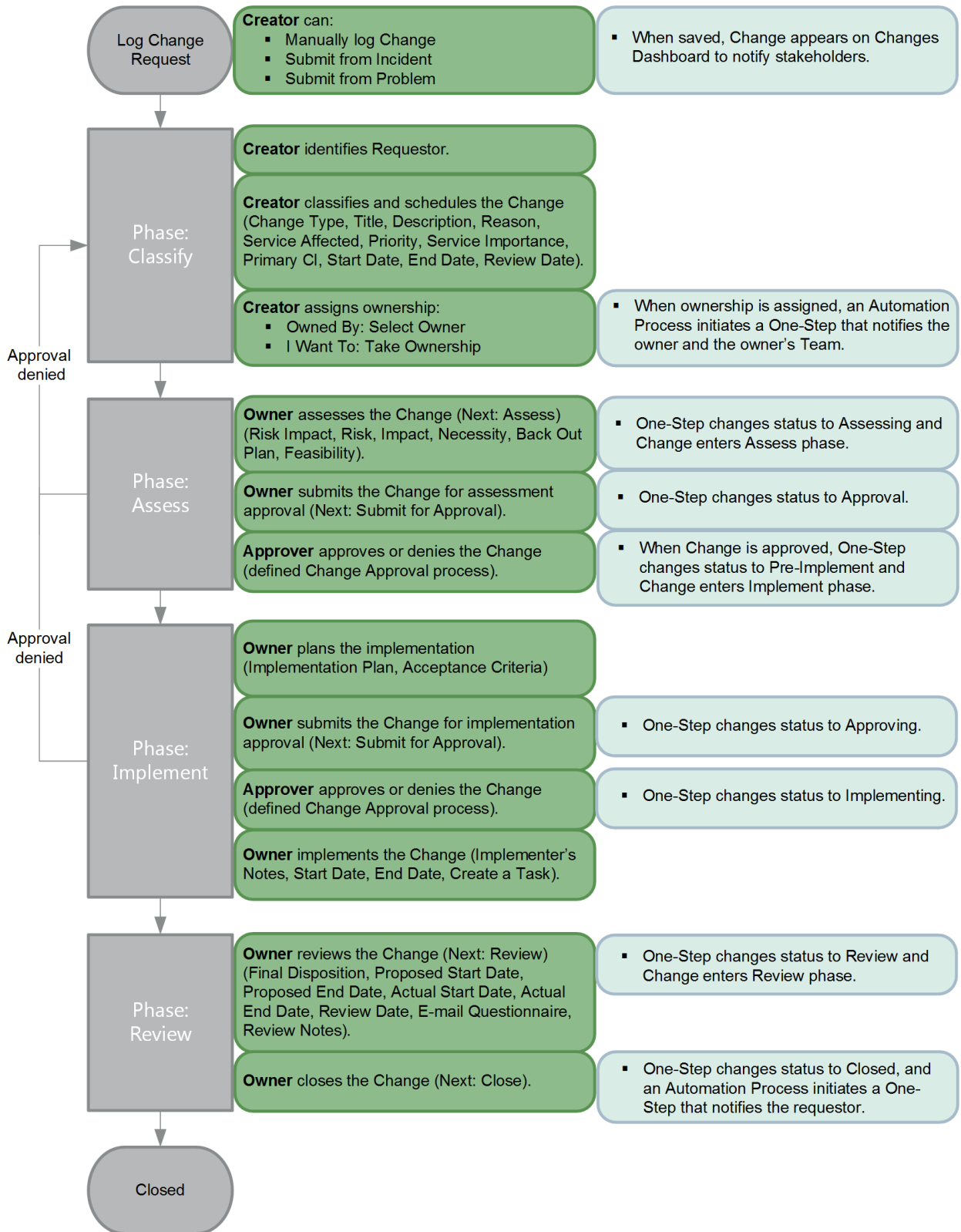
**Tip:** Before closing the Change record, click the **E-Mail Change Review** button in the I Want To section to define and send an e-mail (contains a link to a Change review in the Portal) to the Customer (requestor).

- a. In the Status bar, click the **Next: Close** link.

The status changes to Closed, the Form fields are locked as read-only, and the Change cannot be reopened.

# Normal Change Workflow

CSM provides a unique OOTB workflow for Normal Changes.





**Note:** CSM uses several features to manage the Change workflow (ex: The Change form helps create, manage, and track Changes, One-Step Actions help move the Change through its workflow, Automation Processes notify stakeholders via e-mails, an Approval process enforces Approvals, a Change Dashboard notifies stakeholders and tracks metrics, etc.).

## Contributors

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

## Phases

The Normal Change workflow is divided into the following phases:

1. **Classify:** Creator logs a new Change, and then identifies the requestor. Creator classifies and schedules the Change by defining the type, title, description, reason, Service, priority, Service importance, primary CI, start date, end date, review date. Creator assigns ownership.
2. **Assess:** Creator assesses the Change by defining the risk, risk impact, necessity, back out plan, and feasibility. Owner submits the Change for assessment approval and the approver approves or denies the Change.
3. **Implement:** If the Change is approved, the owner plans the implementation by defining the implementation plan and acceptance criteria. Owner submits the Change for implementation approval and the approver approves or denies the Change. Owner implements the Change by defining the implementer's notes, start date, and end date. If necessary, Owner creates Tasks.
4. **Review:** Owner reviews that Change by defining the final disposition, actual start date, actual end date, and review notes. If necessary, owner send a Change review questionnaire to the requestor. Owner closes the Change.

## Statuses

A Normal Change progressing through the workflow encounters the following statuses:

1. **New:** Change is created, a requestor is identified, the Change is classified and scheduled, and then ownership is assigned.
2. **Assessing:** Change is assessed and submitted for assessment approval.
3. **Approval:** Change assessment is approved (If denied, status changes to Denied).

4. **Pre-Implement:** Change implementation is planned. Change is submitted for implementation approval.
5. **Approving:** Change implementation is approved (If denied, status changes to Denied).
6. **Implementing:** Change is implemented.
7. **Review:** Change is reviewed.
8. **Closed:** Change is closed.

# Log a Normal Change

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

## To manually log a Normal Change:


1. On the CSM toolbar, click **New>New Change Request**.

A new Normal Change Record is created with a unique Change ID and a status of New. The Change automatically enters the Classify phase.

2. Creator selects a **Requestor** (if different from the creator):
  - a. Requestor: 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 Requestor fields are auto-populated with the Customer's name, avatar, e-mail, and phone number. If multiple matches are found, the Contact Manager opens so that you can select the appropriate Customer.

3. Creator classifies and schedules the Change:
  - a. Change Type: Normal is selected by default.
  - b. Change Title: Specify a **title** for the Change.
  - c. Description: Specify a **description** of the Change.


**Tip:** Description is a [Rich Text](#) field. To format the text or embed an image, click the **Zoom** button .

- d. Reason: Select a **reason** for creating the Change.
- e. Service Affected: From the drop-down, select the affected **Service**.
- f. Priority: Click the **Priority** drop-down to reveal the Priority Matrix, and then click a **priority** (Urgent, High, Normal, or Low).


The Priority alert bar indicates the priority.


- g. Service Importance: This field is auto-populated based on the Service Affected selection. However, you can also type a custom Service Importance value.
- h. Primary CI: Click the **CI Selector** button  to launch the [CMDB](#) window, and then select a CI. This shows CIs for any Customer or for a selected Customer.

The selected CI Record appears on the Configuration Items tab (Form Arrangement).

- i. Impact Analysis: Click the **Impact Analysis** button to display the Configuration Map of the Primary CI.
- j. Proposed Start Date: Click the **Calendar Date Selector** button  to select a start date for the Change.

- k. Proposed End Date: Click the **Calendar Date Selector** button  to select an end date for the Change.

**Note:** If a Stop icon  appears next to the Proposed Start Date and/or the Proposed End Date, you are outside of the maintenance window, and you must select an acceptable date. Click the **Propose New Dates** button to clear the Proposed Start Date Field and the Proposed End Date Field, and then select different dates. Click the **Create Emergency** Change button to create an Emergency Change from the Normal Change.

- l. Review Date: The Field automatically populates based on the CI. You can also click the **Calendar Date Selector** button  to select a different review date for the Change.

- m. Planning:

- View Change Calendar: Click the **View Change Calendar** button to open the Change Calendar.

**Note:** The View Change Calendar button displays when the Proposed Start Date and Proposed End Date fields are populated.

- View Collision Detection: Click the **View Collision Detection** button to open a Configuration Map of the Primary CI.

**Note:** The View Collision Detection button displays when the Primary CI field is populated.

4. Creator assigns an Owner to the Change by clicking one of the Ownership links in the Quick Info Tile (*Owned By* and *I Want To* sections). Ownership is required:
- Take Ownership: Click this **link** to make yourself the User Owner.
  - Assign to: Click this **link** to select a User Owner. The Team Owner is populated by the User Owner's default Team.
  - Select Owner (User): Click this **link** to first select a Team and then a User Owner (User is limited by Team).
  - Select Team: Click this **link** to first select a Team Owner.

5. Owner assesses the Change:

- a. In the Status bar, click the **Next: Assess** link.

The status changes to Assessing, and the Change enters the [Assess phase](#).

- b. Click **Next**.

The Assess/Approve page opens.

- c. Complete the assessment:

- i. Risk Impact: Select the **Risk Impact** check box for issues that might occur during the implementation of the Change. Options include:
  - Not During Normal Maintenance Window?
  - Requires Service Outage?



- Mission or Business Critical?
  - Fast Track?
  - ii. Risk: Specify a **description** of any additional risks that might occur during the implementation of the Change.
  - iii. Impact Assessment: Specify the **impact assessment** (consequences of the Change).
  - iv. Necessity Assessment: Specify the **necessity assessment** (based on urgency and how long the change can be delayed).
  - v. Back Out Plan: Specify a **back out plan** or attach information that details what actions to perform if the Change implementation does not work.
  - vi. Feasibility Assessment: Specify the **feasibility assessment** (viability of the Change).
6. Owner submits the Change for assessment approval:



**Note:** If the CAB is able to meet and approve the Change in person, click the **Approve by Show of Hands** link in the I Want To section of the Quick Info Tile to bypass the typical Approval processes. A Show of Hands Approval Form opens, which allows you to provide approval notes, approve the Change, and return to the Change Form.

- a. In the Status bar, click the **Next: Submit for Approval** button.

The status changes to Approval.

7. 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) In the Comments Field, provide your **feedback**.
- c. Click **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.

8. Owner plans the implementation:

- a. Click **Next**.

The Pre-Implement and Implement page opens.

- b. Complete the Pre-Implement section:

- i. Implementation Plan: Specify the **implementation plan** (process required to implement the Change).
- ii. Acceptance Criteria: Specify the **acceptance criteria** (functionality and quality requirements).

9. Owner submits the Change for implementation approval:
  - a. In the Status alert bar, click the **Next: Submit for Approval** link.

The Change status changes to Approving, and Change Record Fields prior to the Implementation section are locked as read-only.



10. Approver approves the implementation of 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) In the Comments Field, provide your **feedback**.
  - c. Click **Approve**.

The Approval status icons indicate the number of pending Approvals and their status (Pending, Approved, Denied, or Abstained).

When the Change is approved, the Change status changes to Implementing.

11. Owner implements the Change:
  - a. Complete the Implement section:
    - i. Implementer's Notes: Specify **details** related to the implementation of the Change.
    - ii. Actual Start Date: Click the **Calendar Date Selector** button  to select the date that the Change actually started.
    - iii. Actual End Date: Click the **Calendar Date Selector** button  to select the date that the Change actually ended.
    - iv. Create a New Task: Click the **Create a New Task** button to create a new Task Record in the Form Arrangement.



**Note:** All Tasks must be closed before the Change Record can be closed.

12. Owner reviews the Change:
  - a. In the Status bar, click the **Next: Review** link.

- b. Click **Next**.

The Review page opens.

- c. Complete the Review section:
    - i. Final Disposition: Click the **drop-down**, and then select the **disposition**.
    - ii. Proposed Start Date: This Field auto-populates with the date the Change was scheduled to start.
    - iii. Proposed End Date: This Field auto-populates with the date the Change was scheduled to end.

- iv. Actual Start Date: This Field auto-populates with the date the Change actually started. Click the **Calendar Date Selector** button  to select a different start date for the Change.
- v. Actual End Date: This Field auto-populates with the date the Change actually ended. Click the **Calendar Date Selector** button  to select a different end date for the Change.
- vi. Review Date: This Field auto-populates with the selected review date.
- vii. E-mail Questionnaire: Click the **E-mail Questionnaire** button to define and send an e-mail (contains a link to a Change review in the Portal) to the Customer (requestor).

**Tip:** You can also send a Change review to the Customer (requestor) at any time by clicking the **E-mail Change Review** button in the I Want To section of the Quick Info Tile.

- viii. Review Notes: Specify **additional information** related to implementation of the Change.
13. Owner closes the Change:
- a. In the Status bar, click the **Next: Close** link.

The status changes to Closed and a read-only Expanded View displays in the Main Pane. After the Change is closed, it cannot be reopened.

# Log a Normal Change - Detailed

The following procedure walks you through the typical steps to log a Normal Change, including tips, optional steps, and behind-the-scenes information. The different contributors are noted in the procedure.

## To manually log a Normal Change:

1. On the CSM toolbar, click **New>New Change Request**.

**Tip:** You can also click **File>New>New Change Request** from the [CSM Desktop Client menu bar](#).

A new Normal Change record is created with a unique Change ID (example: 10890) and a status of New. The Change automatically enters the [Classify phase](#).

**Tip:** The Main Pane displays dynamic embedded forms as you move through the workflow. You can toggle between a simple Step View form and a more detailed Expanded View form.






**Note:** When the Change is first saved, it appears on the Change Dashboard (All Open Change Requests list) to notify Users of its existence.

2. Creator selects a **Requestor** (if different from the person logging the request) in the Quick Info Tile.
  - a. Requestor: Specify the **name** (example: Amy) 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 Requestor fields are auto-populated with the Customer's name, avatar, e-mail, and phone number. If multiple matches are found (example: multiple Customers named Amy), the Contact Manager opens so that you can select the appropriate Customer.


**Tips:** Wildcards (example: % or \*) can be used when searching. If the Customer is a VIP, a

VIP icon  appears beside the name. To browse for a Customer or add a new Customer Record, click the **Customer Selector** button  to launch the Contact Manager. To add an alternate phone number or e-mail address, click the **Alternate Contact Info** link. To view the selected Requestor's detailed Customer Record, click the **Quick View** button .

3. Creator classifies and schedules the Change:

**Tip:** View additional form information and helpful tips by clicking the **INFO** button located on the title banner of the form.

- a. Change Type: Normal is selected by default.
- b. Change Title: Specify a **title** for the Change (example: Install screen capture software).
- c. Description: Specify a **description** of the Change (example: Install SnagIt screen capture software for Curtis Parker).

**Tip:** Description is a [Rich Text](#) field. To format the text or embed an image, click the **Zoom** button .


- d. Reason: Select a **reason** for creating the Change (example: Introduction or Removal of CI).

**Tip:** Add, edit, or delete Change Reason options using a Lookup Table in Table Management (Tools>Table Management>Change Reason).


- e. Service Affected: In the drop-down, select the affected **Service** (example: Employee Support).
- f. Priority: Click the **Priority** drop-down to reveal the Priority Matrix, and then click a **priority** (example: Low for an optional Service that only affects one individual).



The Priority alert bar indicates the priority.


**Note:** Red indicates an Urgent priority, orange indicates a High priority, and green indicates a Normal or Low priority. These values are set in the Change Priority table (Tools>Table Management>Change Priority).


- g. Service Importance: This field is auto-populated based on the Service Affected selection (example: Support). However, you can also type a custom Service Importance value.
- h. Primary CI: Click the **CI Selector** button  to launch the **CMDB** window, and then select a CI (example: curtis-desk). This shows CIs for any Customer or for a selected Customer.

The selected CI record appears on the Configuration Items tab (Arrangement area).

**Tip:** View the selected CI record by clicking the **Quick View** button  or by going to the record in the Configuration Items tab (Form Arrangement), clicking **View**, and then selecting **Form View**.

- i. Impact Analysis: Click the **Impact Analysis** button to display the Configuration Map of the Primary CI.
- j. Proposed Start Date: Click the **Calendar Date Selector** button  to select a start date for the Change.
- k. Proposed Start Date: Click the **Calendar Date Selector** button  to select a start date for the Change.

**Note:** If a Stop icon  appears next to the Proposed Start Date and/or the Proposed End Date, you are outside of the maintenance window, and you must select an acceptable date. Click the **Propose New Dates** button to clear the Proposed Start Date field and the Proposed End Date field, and then select different dates. Click the **Create Emergency Change** button to create an Emergency Change from the Normal Change.

- l. Review Date: The field automatically populates based on the CI. You can also click the **Calendar Date Selector** button  to select a different review date for the Change.
- m. Planning:
  - View Change Calendar: Click the **View Change Calendar** button to open the Change [Calendar](#).

**Note:** The View Change Calendar button displays when the Proposed Start Date and Proposed End Date fields are populated.

- View Collision Detection: Click the **View Collision Detection** button to open a Configuration Map of the Primary CI.

**Note:** The View Collision Detection button displays when the Primary CI field is populated.

**Tip:** Nominate the Normal Change to become a Standard Change by clicking the **Nominate for Standard Change** link in the I Want To section of the Quick Info Tile. After clicking the link, select a Standard Change Template for the Change. A new Normal Change record is created and is auto-populated with the Requestor, Change Title, Description, Service Affected, Priority, Service importance, and Primary CI.

4. Creator assigns an Owner to the Change by clicking one of the Ownership links in the Quick Info Tile (*Owned By* and *I Want To* sections). Ownership is required:
  - Take Ownership: Click this **link** to make yourself the User Owner.
  - Assign to: Click this **link** to select a User Owner. The Team Owner is populated by the User Owner's default Team.
  - Select Owner (User): Click this **link** to first select a Team and then a User Owner (User is limited by Team).
  - Select Team: Click this **link** to first select a Team Owner.

5. Owner assesses the Change:
  - a. In the Status bar, click the **Next: Assess** link.

The Change status changes to Assessing and the Change enters the [Assess phase](#).

- b. Click **Next**.

The Assess/Approve page opens.

- c. Complete the assessment:
  - i. Risk Impact: Select the **Risk Impact** check box for issues that might occur during the implementation of the Change. Options include:
    - Not During Normal Maintenance Window?
    - Requires Service Outage?
    - Mission or Business Critical?
    - Fast Track?
  - ii. Risk: Specify a **description** of any additional risks that might occur during the implementation of the Change.
  - iii. Impact Assessment: Specify the **impact assessment** (consequences of the Change).
  - iv. Necessity Assessment: Specify the **necessity assessment** (based on urgency and how long the change can be delayed).

- v. Back Out Plan: Specify a **back out plan** or attach information that details what actions to perform if the Change implementation does not work.
  - vi. Feasibility Assessment: Specify the **feasibility assessment** (viability of the Change).
6. Owner submits the Change for assessment approval:



**Note:** If the CAB is able to meet and approve the Change in person, click the **Approve by Show of Hands** link in the I Want To section of the Quick Info Tile to bypass the typical Approval processes. A Show of Hands Approval form opens, which allows you to provide approval notes, approve the Change, and return to the Change form.

- a. In the Status bar, click the **Next: Submit for Approval** button.

The Change status changes to Approval.

7. Approver approves the Change.
- a. In the Approval grid, 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) In the Comments field, provide your **feedback**.
- c. Click **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](#).

8. Owner plans the implementation:

- a. Click **Next**.

The Pre-Implement and Implement page opens.

- b. Complete the Pre-Implement section:
  - i. Implementation Plan: Specify the **implementation plan** (process required to implement the Change).
  - ii. Acceptance Criteria: Specify the **acceptance criteria** (functionality and quality requirements).

9. Owner submits the Change for implementation approval:

- a. In the Status bar, click the **Next: Submit for Approval** link.

The Change status changes to Approving and Change record fields prior to the Implementation section are locked as read-only.

10. Approver approves the implementation of the Change:
- a. In the Approval grid, 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) In the Comments field, provide your **feedback**.
- c. Click **Approve**.

The Approval Status icons indicate the number of pending Approvals and their status (Pending, Approved, Denied, or Abstained).

When the Change is approved, the Change status changes to Implementing.

11. Owner implements the Change:



- a. Complete the Implement section:
  - i. Implementer's Notes: Specify **details** related to implementation of the Change.
  - ii. Actual Start Date: Click the **Calendar Date Selector** button  to select the date that the Change actually started.
  - iii. Actual End Date: Click the **Calendar Date Selector** button  to select the date that the Change actually ended.
  - iv. Create a New Task: Click the **Create a New Task** button to create a new Task record in the Form Arrangement.

**Note:** All Tasks must be closed before the Change record can be closed.

12. Owner reviews the Change:

- a. In the Status bar, click the **Next: Review** link.
- b. Click **Next**.

The Review page opens.

- c. Complete the Review section:
  - i. Final Disposition: Click the **drop-down**, and then select the **disposition** (example: Successful).
  - ii. Proposed Start Date: This field auto-populates with the date the Change was scheduled to start.
  - iii. Proposed End Date: This field auto-populates with the date the Change was scheduled to end.
  - iv. Actual Start Date: This field auto-populates with the date the Change actually started. Click the **Calendar Date Selector** button  to select a different start date for the Change.
  - v. Actual End Date: This field auto-populates with the date the Change actually ended. Click the **Calendar Date Selector** button  to select a different end date for the Change.
  - vi. Review Date: This field auto-populates with the selected review date.



- vii. E-Mail Questionnaire: Click the **E-Mail Questionnaire** button to define and send an e-mail (contains a link to a Change review in the Portal) to the Customer (requestor).

**Tip:** You can also send a Change review to the Customer (requestor) at any time by clicking the **E-Mail Change Review** button in the I Want To section of the Quick Info Tile.

- viii. Review Notes: Specify **additional information** related to implementation of the Change.

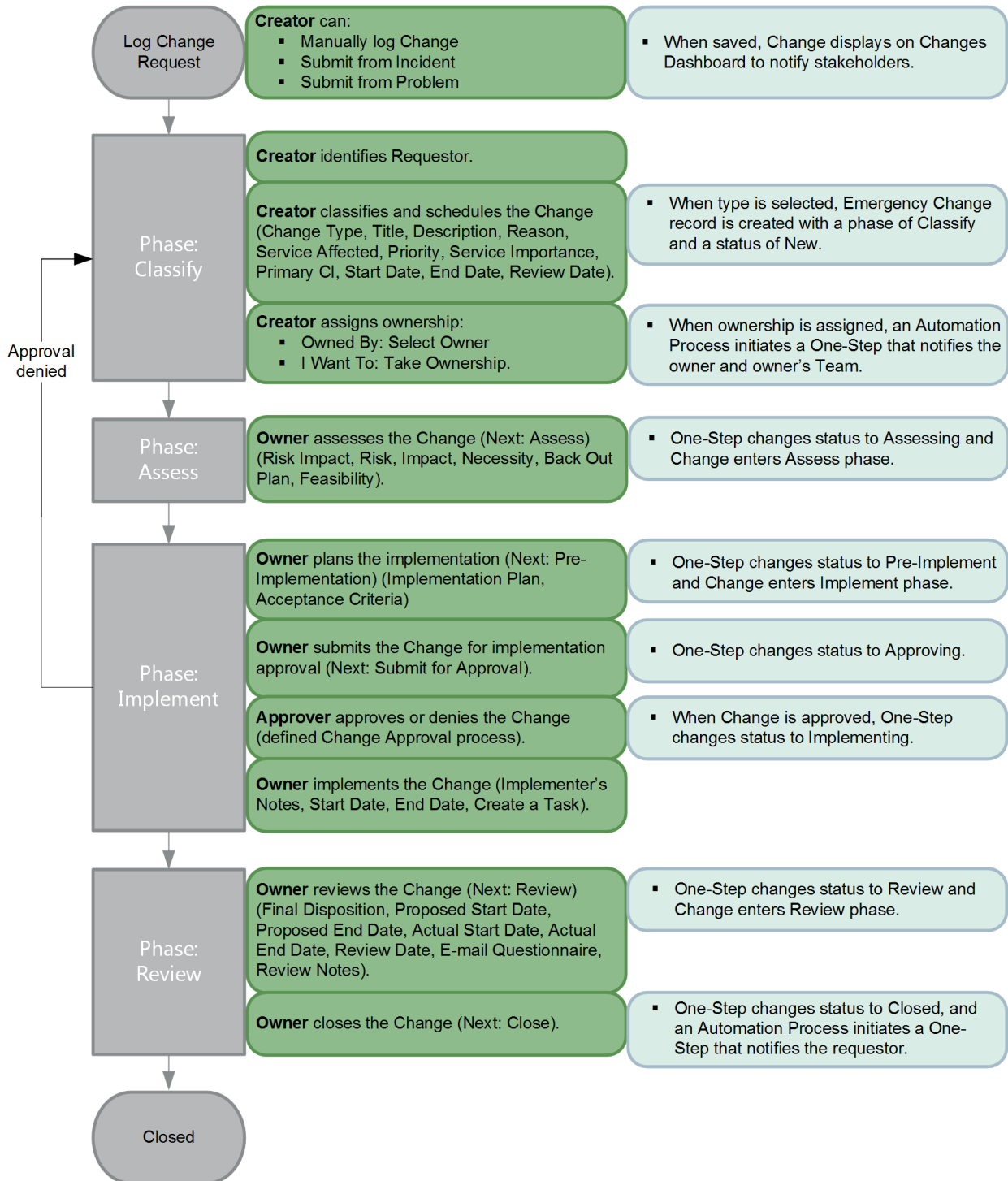
13. Owner closes the Change:

- a. In the Status bar, click the **Next: Close** link.

The status changes to Closed and a read-only Expanded View displays in the Main Pane. After the Change is closed, it cannot be reopened.

# Emergency Change Workflow

CSM provides a unique OOTB workflow for Emergency Changes.





**Note:** CSM uses several features to manage the Change workflow (ex: The Change form helps create, manage, and track Changes, One-Step Actions help move the Change through its workflow, Automation Processes notify stakeholders via e-mails, an Approval process enforces Approvals, a Change Dashboard notifies stakeholders and tracks metrics, etc.).

## Contributors

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

## Phases

The Emergency Change workflow is divided into the following phases:

1. **Classify:** Creator logs a new Change, and then identifies the requestor. Creator classifies and schedules the Change by defining the type, title, description, reason, Service, priority, Service importance, primary CI, start date, end date, review date. Creator assigns ownership.
2. **Assess:** Creator assesses the Change by defining the risk, risk impact, necessity, back out plan, and feasibility.
3. **Implement:** Owner plans the implementation by defining the implementation plan and acceptance criteria. Owner submits the Change for implementation approval and the approver approves or denies the Change. Owner implements the Change by defining the implementer's notes, start date, and end date. If necessary, Owner creates Tasks.
4. **Review:** Owner reviews that Change by defining the final disposition, actual start date, actual end date, and review notes. If necessary, owner send a Change review questionnaire to the requestor. Owner closes the Change.

## Statuses

An Emergency Change progressing through the workflow encounters the following statuses:

1. **Classify:** Change is created, a requestor is identified, the Change is classified and scheduled, and then ownership is assigned.
2. **Assessing:** Change is assessed.
3. **Pre-Implement:** Change implementation is planned. Change is submitted for implementation approval.
4. **Approving:** Change implementation is approved (If denied, status changes to Denied).

5. **Implementing:** Change is implemented.
6. **Review:** Change is reviewed.
7. **Closed:** Change is closed.

# Log an Emergency Change

The following procedure walks you through the typical steps to log an Emergency Change.

## To manually log an Emergency Change:

1. On the CSM toolbar, click **New > New Change Request**.

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

2. Creator selects a **Requestor** (if different from the creator):
  - a. Requestor: 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 Requestor fields are auto-populated with the Customer's name, avatar, e-mail, and phone number. If multiple matches are found, the Contact Manager opens so that you can select the appropriate Customer.

3. Creator classifies and schedules the Change:
  - a. Change Type: Change Type: In the drop-down, select **Emergency**.



The Emergency Change form opens.

The Change automatically enters the Classify phase with a status of New.


- b. Complete the Classify/Schedule section:
  - i. Change Title: Specify a **title** for the Change.
  - ii. Description: Specify a **description** of the Change.


**Tip:** Description is a **Rich Text** field. To format the text or embed an image, click the **Zoom** button .

- iii. Reason: Select a **reason** for creating the Change.
- iv. Service Affected: From the drop-down, select the affected **Service**.
- v. Priority: Click the **Priority** drop-down to reveal the Priority Matrix, and then click a **priority** (Urgent, High, Normal, or Low).
 

The Priority alert bar indicates the priority.
- vi. Service Importance: This field is auto-populated based on the Service Affected selection. However, you can also type a custom Service Importance value.
- vii. Primary CI: Click the **CI Selector** button  to launch the CMDB window, and then select a CI. This shows CIs for any Customer or for a selected Customer.
- viii. Impact Analysis: Click the **Impact Analysis** button to display the Configuration Map of the Primary CI.
- ix. Proposed Start Date: Click the **Calendar Date Selector** button  to select a start date for the Change.

- x. Proposed Start Date: Click the **Calendar Date Selector** button  to select a start date for the Change.

**Note:** If a Stop icon  appears next to the Proposed Start Date and/or the Proposed End Date, you are outside of the maintenance window, and you must select an acceptable date.

- xi. Review Date: The field automatically populates based on the CI. You can also click the **Calendar Date Selector** button  to select a different review date for the Change.

- xii. Planning:

- View Change Calendar: Click the **View Change Calendar** button to open the Change [Calendar](#).

**Note:** The View Change Calendar button displays when the Proposed Start Date and Proposed End Date fields are populated.

- View Collision Detection: Click the **View Collision Detection** button to open a Configuration Map of the Primary CI.

**Note:** The View Collision Detection button displays when the Primary CI field is populated.

4. Creator assigns an Owner to the Change by clicking one of the Ownership links in the Quick Info Tile (*Owned By* and *I Want To* sections). Ownership is required:
- Take Ownership: Click this **link** to make yourself the User Owner.
  - Assign to: Click this **link** to select a User Owner. The Team Owner is populated by the User Owner's default Team.
  - Select Owner (User): Click this **link** to first select a Team and then a User Owner (User is limited by Team).
  - Select Team: Click this **link** to first select a Team Owner.

5. Owner assesses the Change:

- a. In the Status bar, click the **Next: Assess** link.

The Change status changes to Assessing and the Change enters the Assess phase.

- b. Click **Next**.

The Assess/Approve page opens.

- c. Complete the assessment:

- i. Risk Impact: Check the **Risk Impact** check box for issues that might occur during the implementation of the Change. Options include:
  - Not During Normal Maintenance Window?
  - Requires Service Outage?
  - Mission or Business Critical?

- Fast Track?
  - ii. Risk: Specify a **description** of any additional risks that might occur during the implementation of the Change.
  - iii. Impact Assessment: Specify the **impact assessment** (consequences of the Change).
  - iv. Necessity Assessment: Specify the **necessity assessment** (based on urgency and how long the change can be delayed).
  - v. Back Out Plan: Specify a **back out plan** or attach information that details what actions to perform if the Change implementation does not work.
  - vi. Feasibility Assessment: Specify the **feasibility assessment** (viability of the Change).
6. Owner plans the implementation:
- a. In the Status bar, click the **Next: Pre-Implementation** link.
- The Change status changes to Pre-Implement and the Change enters the Implement phase.
- b. Click **Next**.
- The Pre-Implement and Implement page opens.
- c. Complete the Pre-Implement section:
    - i. Implementation Plan: Specify the **implementation plan** (process required to implement the Change).
    - ii. Acceptance Criteria: Specify the **acceptance criteria** (functionality and quality requirements).
7. Owner submits the Change for implementation approval:



**Note:** If the CAB is able to meet and approve the Change in person, click the **Approve by Show of Hands** link in the I Want To section of the Quick Info Tile to bypass the typical Approval process. A Show of Hands Approval form opens, which allows you to provide approval notes, approve the Change, and return to the Change form.



- a. In the Status bar, click the **Next: Submit for Approval** link.
- The Change status changes to Approval and Change fields prior to the Implementation section are locked as read-only.
8. Approver approves the Change:
- a. In the Approval grid, 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) In the Comments field, provide your **feedback**.
  - c. Click **Approve**.
- The Approval Status icons indicate the number of pending Approvals and their status (Pending, Approved, Denied, or Abstained).



When the Change is approved, the Change status changes to Implementing.

9. Owner implements the Change:

a. Complete the Implement section:

- i. Implementer's Notes: Specify **details** related to implementation of the Change.
- ii. Actual Start Date: Click the **Calendar Date Selector** button  to select the date that the Change actually started.
- iii. Actual End Date: Click the **Calendar Date Selector** button  to select the date that the Change actually ended.
- iv. Create a New Task: Click the **Create a New Task** button to create a new Task record in the Form Arrangement.

**Note:** All Tasks must be closed before the Change record can be closed.



10. Owner reviews the Change:

a. In the Status bar, click the **Next: Review** link.

The Change status changes to Review and the Change enters the Review phase.

b. Click **Next**.

The Review page opens.

- i. Final Disposition: Click the **drop-down**, and then select the **disposition**.
- ii. Proposed Start Date: This field auto-populates with the date the Change was scheduled to start.
- iii. Proposed End Date: This field auto-populates with the date the Change was scheduled to end.
- iv. Actual Start Date: This field auto-populates with the date the Change actually started. Click the **Calendar Date Selector** button  to select a different start date for the Change.
- v. Actual End Date: This field auto-populates with the date the Change actually ended. Click the **Calendar Date Selector** button  to select a different end date for the Change.
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**Tip:** You can also send a Change review to the Customer (requestor) at any time by clicking the **E-Mail Change Review** button in the I Want To section of the Quick Info Tile.

- viii. Review Notes: Specify **additional information** related to implementation of the Change.

11. Owner closes the Change:

a. In the Status bar, click the **Next: Close** link.

The status changes to Closed and a read-only Expanded View displays in the Main Pane.  
After the Change is closed, it cannot be reopened.

# Log an Emergency Change - Detailed

The following procedure walks you through the typical steps to log a Normal Change, including tips, optional steps, and behind-the-scenes information. The different contributors are noted in the procedure.

## To manually log an Emergency Change:

1. On the CSM toolbar, click **New>New Change Request**.

**Tip:** You can also click **File>New>New Change Request** from the [CSM Desktop Client menu bar](#).

A new Normal Change record is created with a unique Change ID (example: 10890).

**Tip:** The Main Pane displays dynamic embedded forms as you move through the workflow. You can toggle between a simple Step View form and a more detailed Expanded View form.





**Note:** When the Change is first saved, it appears on the Change Dashboard (All Open Change Requests list) to notify Users of its existence.

2. Creator selects a **Requestor** (if different from the person logging the request) in the Quick Info Tile.
  - a. Requestor: Specify the **name** (example: Amy) 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 Requestor fields are auto-populated with the Customer's name, avatar, e-mail, and phone number. If multiple matches are found (example: multiple Customers named Amy), the Contact Manager opens so that you can select the appropriate Customer.

**Tips:** Wildcards (example: % or \*) can be used when searching. If the Customer is a VIP, a



VIP icon appears beside the name. To browse for a Customer or add a new Customer Record, click the **Customer Selector** button  to launch the Contact Manager. To add an alternate phone number or e-mail address, click the **Alternate Contact Info** link. To view the selected Requestor's detailed Customer Record, click the **Quick View** button .

3. Creator classifies and schedules the Change:

**Tip:** View additional form information and helpful tips by clicking the **INFO** button located on the title banner of the form.


- a. Change Type: Change Type: In the drop-down, select **Emergency**.

The Emergency Change form opens.

The Change automatically enters the Classify phase with a status of New.

- b. Complete the Classify/Schedule section:
  - i. Change Title: Specify a **title** for the Change (example: Reboot E-Mail Server).

- ii. Description: Specify a **description** of the Change (example: Several employees cannot access their e-mail. Standard fixes have not worked, so a reboot of the e-mail server is required).




**Tip:** Description is a **Rich Text** field. To format the text or embed an image, click the **Zoom** button .


- iii. Reason: Select a **reason** for creating the Change (example: Incident/Problem Resolution).


**Tip:** Add, edit, or delete Change Reason options using a Lookup Table in Table Management (Tools>Table Management>Change Reason).

- iv. Service Affected: In the drop-down, select the affected **Service** (example: E-Mail/Calendaring).
- v. Priority: Click the **Priority** drop-down to reveal the Priority Matrix, and then click a **priority** (example: Urgent for a Mission-Critical Service that affects an entire department or VIP).

The Priority alert bar indicates the priority.

- vi. Service Importance: This field is auto-populated based on the Service Affected selection (example: Mission-Critical). However, you can also provide a custom Service importance value.
- vii. Primary CI: Click the **CI Selector** button  to launch the CMDB window, and then select a CI (example: Mail Server). This shows CIs for any Customer or for a selected Customer.
- viii. Impact Analysis: Click the **Impact Analysis** button to display the Configuration Map of the Primary CI.
- ix. Proposed Start Date: Click the **Calendar Date Selector** button  to select a start date for the Change.
- x. Proposed Start Date: Click the **Calendar Date Selector** button  to select a start date for the Change.

**Note:** If a Stop icon  appears next to the Proposed Start Date and/or the Proposed End Date, you are outside of the maintenance window, and you must select an acceptable date.

- xi. Review Date: The field automatically populates based on the CI. You can also click the **Calendar Date Selector** button  to select a different review date for the Change.
- xii. Planning:
  - View Change Calendar: Click the **View Change Calendar** button to open the Change [Calendar](#).

**Note:** The View Change Calendar button displays when the Proposed Start Date and Proposed End Date fields are populated.

- View Collision Detection: Click the **View Collision Detection** button to open a Configuration Map of the Primary CI.

**Note:** The View Collision Detection button displays when the Primary CI field is populated.

4. Creator assigns an Owner to the Change by clicking one of the Ownership links in the Quick Info Tile (*Owned By* and *I Want To* sections). Ownership is required:
  - Take Ownership: Click this **link** to make yourself the User Owner.
  - Assign to: Click this **link** to select a User Owner. The Team Owner is populated by the User Owner's default Team.
  - Select Owner (User): Click this **link** to first select a Team and then a User Owner (User is limited by Team).
  - Select Team: Click this **link** to first select a Team Owner.

5. Owner assesses the Change:
  - a. In the Status bar, click the **Next: Assess** link.

The Change status changes to Assessing and the Change enters the Assess phase.

- b. Click **Next**.

The Assess page opens.

- c. Complete the assessment:
    - i. Risk Impact: Check the **Risk Impact** check box for issues that might occur during the implementation of the Change. Options include:
      - Not During Normal Maintenance Window?
      - Requires Service Outage?
      - Mission or Business Critical?
      - Fast Track?
    - ii. Risk: Specify a **description** of any additional risks that might occur during the implementation of the Change.
    - iii. Impact Assessment: Specify the **impact assessment** (consequences of the Change).
    - iv. Necessity Assessment: Specify the **necessity assessment** (based on urgency and how long the change can be delayed).
    - v. Back Out Plan: Specify a **back out plan** or attach information that details what actions to perform if the Change implementation does not work.
    - vi. Feasibility Assessment: Specify the **feasibility assessment** (viability of the Change).

6. Owner plans the implementation:
  - a. In the Status bar, click the **Next: Pre-Implementation** link.

The Change status changes to Pre-Implement and the Change enters the Implement phase.

b. Click **Next**.

The Pre-Implement and Implement page opens.

c. Complete the Pre-Implement section:

- i. Implementation Plan: Specify the **implementation plan** (process required to implement the Change).
- ii. Acceptance Criteria: Specify the **acceptance criteria** (functionality and quality requirements).

7. Owner submits the Change for implementation approval:



**Note:** If the CAB is able to meet and approve the Change in person, click the **Approve by Show of Hands** link in the I Want To section of the Quick Info Tile to bypass the typical Approval process. A Show of Hands Approval form opens, which allows you to provide approval notes, approve the Change, and return to the Change form.

a. In the Status bar, click the **Next: Submit for Approval** link.

The Change status changes to Approval and Change fields prior to the Implementation section are locked as read-only.

8. Approver approves the Change:

a. In the Approval grid, 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) In the Comments field, provide your **feedback**.



c. Click **Approve**.

The Approval Status icons indicate the number of pending Approvals and their status (Pending, Approved, Denied, or Abstained).

When the Change is approved, the Change status changes to Implementing.

9. Owner implements the Change:

a. Complete the Implement section:

- i. Implementer's Notes: Specify **details** related to implementation of the Change.
- ii. Actual Start Date: Click the **Calendar Date Selector** button  to select the date that the Change actually started.
- iii. Actual End Date: Click the **Calendar Date Selector** button  to select the date that the Change actually ended.
- iv. Create a New Task: Click the **Create a New Task** button to create a new Task record in the Form Arrangement.

**Note:** All Tasks must be closed before the Change record can be closed.

10. Owner reviews the Change:

- a. In the Status bar, click the **Next: Review** link.

The Change status changes to Review and the Change enters the Review phase.

- b. Click **Next**.

The Review page opens.

- i. Final Disposition: Click the **drop-down**, and then select the **disposition** (example: Successful).
- ii. Proposed Start Date: This field auto-populates with the date the Change was scheduled to start.
- iii. Proposed End Date: This field auto-populates with the date the Change was scheduled to end.
- iv. Actual Start Date: This field auto-populates with the date the Change actually started.
- v. Actual End Date: This field auto-populates with the date the Change actually ended.
- vi. Review Date: This field auto-populates with the selected review date.
- vii. E-Mail Questionnaire: Click the **E-Mail Questionnaire** button to define and send an e-mail (contains a link to a Change review in the Portal) to the Customer (requestor).

**Tip:** You can also send a Change review to the Customer (requestor) at any time by clicking the **E-Mail Change Review** button in the I Want To section of the Quick Info Tile.

- viii. Review Notes: Specify **additional information** related to implementation of the Change.

11. Owner closes the Change:

- a. In the Status bar, click the **Next: Close** link.

The status changes to Closed and a read-only Expanded View displays in the Main Pane. After the Change is closed, it cannot be reopened.

# Change Design Ideas

CSM provides an OOTB 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, which Fields support [Rich Text](#), etc.
- **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 (ex: Add another Approval process), or implement any of the unused sample One-Step Actions that are shipped with CSM (ex: Create and send out a Change Review questionnaire).
- **E-mail:** Change the templates that are used to create the e-mails sent by [Automation Processes](#). Or, disable/change when and to whom notifications are sent (ex: Notify Change owners by e-mail of any status updates).
- **Field Value Options:** Use Table Management to add/edit Lookup Object values for use in drop-down Fields (ex: CAB Members).
- **Approvals:** Modify the Approval process rules (ex: The number or percentage of approvers needed to approve a Change).



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



# Change Features

CSM provides the following tools to help manage Change:

# Change Form

Use the Change Form to create, edit, and track Changes. The Form has four areas:

1. A workflow bar tracks the Change as it progresses through the Change workflow phases:
  - Standard Change: Classify, Implement.
  - Normal Change: Classify, Assess, Implement, Review.
  - Emergency: Classify, Assess Implement, Review.
2. The Quick Info Tile displays important at-a-glance information, such as Change ID, Change Type (Standard, Normal, or Emergency), Status bar (current status), Priority alert bar, Requestor, Ownership (Change Manager), and common operations (I Want To section).
3. The Main Pane displays dynamic embedded forms as you move through the workflow. Using Normal and Emergency Changes, you can toggle between a simple Step View form and a detailed Expanded View form.
4. The Arrangement dynamically displays linked records (child records) that are related to the Change (parent record), such as Journals (to track notes and history), **Problems**, and **Incidents**. Additional tabs related to the Change are displayed as information is recorded onto the Form.

The screenshot shows the Change Form for Change 10920. The interface is divided into four main areas:



- Area 1 (Workflow Bar):** Located at the top, it shows the current phase 'Classify' and other phases 'Assess', 'Implement', and 'Review'.
- Area 2 (Quick Info Tile):** Located on the left, it displays 'Change 10920', 'Type: Normal', 'Status: New', and 'Priority: Low'. It also shows the requestor 'Sylvia Medina' and the change manager 'You'.
- Area 3 (Main Pane):** The central area contains a form for 'Change Title: Install Screen Capture Software'. It includes fields for 'Change Type: Normal', 'Description: Install screen capture software for new employee (Curtis)', 'Reason: Introduction or Removal of CI', 'Service Affected: Desktop Management', and 'Priority: Low'. It also has fields for 'Primary CI: curtis-desk', 'Proposed Start Date: 5/5/2015', 'Proposed End Date: 5/30/2015', and 'Review Date: 7/10/2015'.
- Area 4 (Arrangement):** At the bottom, it displays a table of related records (child records).

CI Type	Asset Tag	HostName	IPAddress	Manufacturer	Model	Location - Floor
Config - Compl	4418	curtis-desk	10.10.2.137	Dell	OptiPlex 9010 Desktop	2

The following table describes notable fields on the Form.

Field	Description	Comments
<b>Quick Info Tile</b>	Important at-a-glance information, such as Change ID, Type alert bar, Status alert bar, Priority alert bar, requestor information, ownership, and common operations (I Want To section).	
Change	Record type.	CSM automatically assigns the Record Type based on type of record created (New>Change Request).
ID	Unique record identifier (example: 10890).	CSM automatically assigns the ID when the Change is created.
<b>Type alert bar</b>	Type of Change (Normal, Standard, Emergency). The color green indicates a Standard or Normal Change, and the color red indicates an Emergency Change.	CSM automatically displays the appropriate Change form based on the type of Change.
<b>Status alert bar</b>	Current status of the Change as it progresses through the Change workflow.	Change statuses do not always align with Change phases.
<b>Priority alert bar</b>	The color (red/orange/green) indicates the level of priority.	Priority is defined using the Priority dropdown (Priority Matrix) in the Classify section of the Main Pane.
<b>Requestor</b>	Person who initiates the Change.	CSM automatically assigns the Change creator as the requestor, but a different requestor can be selected.
Requestor Name	<p>Name of the Customer who initiated the Change.</p> <p>Provide a name in the Requestor field (example: Clair), and then press <b>&lt;Enter&gt;</b> or <b>&lt;Tab&gt;</b> to locate the Customer Record.</p> <p><b>Note:</b> Wildcards like % or * can be used with partial information. If an exact match is found, the information auto-populates the Requestor, Phone, and E-mail fields. If multiple matches are found (example: Multiple Customers named Clair), the Contact Manager opens so that the technician can select the appropriate one.</p>	After you select a Customer, the Photo, Phone, and E-mail fields are auto-populated with information from the Customer record.

Field	Description	Comments
Avatar	Avatar (photo or image) of the Customer who initiated the Change.	The Avatar, Phone, and E-mail fields are auto-populated with information from the requestor's Customer Record.  One-Step Action (Dial Customer Phone): Dials the Customer's phone number.  One-Step Action (Follow-up E-mail): Creates a follow-up e-mail to send the Customer regarding a question or update about the Change. Allows the User to edit the e-mail before clicking Send. Attaches the e-mail to the Change History record.
E-mail	E-mail address of the Customer who initiated the Change.  Click the <b>link</b> to create an e-mail addressed to the Customer (if e-mail is configured).	
Phone	Phone number of the Customer who initiated the Change.  Click the <b>link</b> to dial the Customer (if telephony is configured).	
<b>Owned By/ Change Manager</b>	Record owner.	
User Owner -select owner-	Name of the User owner. Click the <b>link</b> to first select a Team and then a User owner (User is limited by Team).  Typically, the owner is the Reviewer and a member of the Support Team.	One-Step Action (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.
Team Owner -select team-	Name of the owner Team. Click the <b>link</b> to select a Team owner.	One-Step Action (Assign to Team):  Launches the Choose Team window, where a User can choose an Owned By Team for the record.
Assign to	Click the <b>link</b> to select a User owner for the Change. The Team owner is auto-populated by the selected User owner's default Team.	One-Step Action (Assign to ANY 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.
Avatar	Photo/graphic associated with the User owner (from User profile)	
<b>I Want To</b>	Common operations.	

Field	Description	Comments
Take Ownership	Click the <b>link</b> to make yourself (Current User) the User owner for the Change.	One-Step Action (Take Ownership): Makes the Current User the Primary User of the record.
E-mail Change Review	Click the <b>link</b> to define and send an e-mail containing a link to the Review Questionnaire.	One-Step Action (Create Change Review): Creates a new Review Questionnaire (Supporting Object) and creates an e-mail containing a link to the review and record details (Description, Scheduled End Date, Actual End Date, etc.).
<b>Main Pane</b>	Displays detailed information about the Change, such as title, description, etc.	Fields in the Main Pane vary based on the type of Change.
Change Type	Type of Change. Click the <b>drop-down</b> and select a Change type (Normal, Standard, Emergency).	Different Change forms display based on the type of Change.
Change Title	Display name for the Change.	
Description	Description of the Change.	
Primary CI	CI affected by the Change.	
Proposed Start Date	Expected start date. Click the <b>Calendar Date Selector</b> button  to select a start date for the Change.	
Proposed End Date	Expected end date. Click the <b>Calendar Date Selector</b> button  to select an end date for the Change.	
Impact Analysis	Displays a Configuration Map of the primary CI. Click the <b>button</b> to open the Configuration Map window.	

# Change Journals

CSM provides the following OOTB 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 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. Note and Customer Request Journals are manually created.

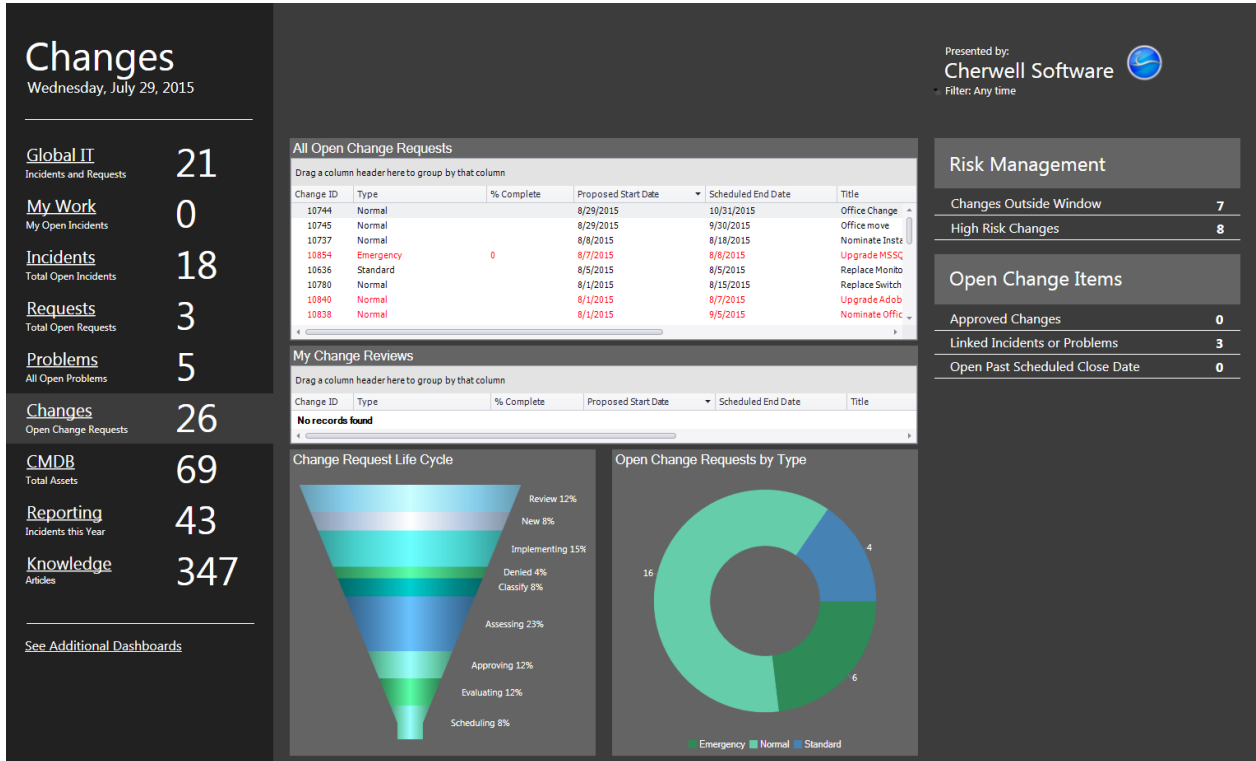
Each Journal Type has its own unique form. Journals are child records, so they are linked to and available from their parent records (access Journals by clicking the Journals tab in the parent record's Arrangement).



**Note:** For detailed information about Journal forms, refer to Journal forms.

# Change Dashboard

CSM provides a OOTB 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 OOTB Dashboards (example: Global IT).

The following table describes the items on the Dashboard.

Item	Description	Widget Type	Widget Name	Widget Uses:
All Open Change Requests	All open Changes.	Search Results List	CDAll Open Changes	All Open Changes Search Group
My Change Reviews	Number of approved Changes owned by the current User.	Search Results List	CDAll Approved Changes	My Approved Changes Search Group
Approved Changes	All approved Changes.	Text Gauge	CDTotal Approved Changes	Approved Changes Search Group

Item	Description	Widget Type	Widget Name	Widget Uses:
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 Search Group
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 Search Group
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 Search Group
High Risk Changes	Uncompleted Changes (Status does not = Complete) with a risk value that is greater than/equal to 3.	Text Gauge	CDHigh Risk Changes	High Risk Changes Search Group
Change Request Life Cycle	Number of open Changes based on status.	Pipeline Chart	CDChange Request Lifecycle	All Open Changes Search Group
Open Change Requests by Type	Percentage of open Changes based on type.	Doughnut Chart	CDChanges by Type	Change Requests Search Group



## Change One-Step Actions

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

One-Step Actions	Description/Actions	Associations	Executed From
<b>Status</b>			
Alt Step from Relationship	Conditionally change 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 Request	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 Request	Change Form: Form buttons
<b>Form</b>			
<b>Ownership</b>			
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 Request	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 Request	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 Request	Change Form: Select Team link
Take Ownership of Change	Makes the Current User the Primary User of the record.	Change Request	Change Form: Take Ownership link (I Want To section)
<b>Other</b>			

Create Change Review	Creates a new Review Questionnaire (Supporting Object) and creates an e-mail containing a link to the review and record details (Description, Scheduled End Date, Actual End Date, etc.).	Change Request	Change Form: E-Mail Change Review link (I Want To section) Change Request Actions toolbar item; Create Change Review option
Create New Task	Creates a new Task in the Change's Form Arrangement.	Change Request	Change Form: Create New Task link (I Want To section)
Nominate for Standard Change	Creates a new Normal Change Record.	Change Request	Change Form: Nominate for Standard Change link (I Want To section)
Rework Change Request	Changes the Change status to New so that Users can edit fields and then resubmit the Change for CAB Approval.	Change Request	Change Form: Rework Change link (I Want To section)

A full list of One-Steps 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-Steps associated with a particular type of Business Object.

## Change Search Groups

CSM provides numerous OOTB Change [Search Groups](#). Notable Change Search Groups include:

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

# Change Automation Processes

CSM provides the following OOTB Change [Automation Processes](#):

Name	Description
Notify Requestor 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 e-mail notification of the status change to the requestor 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 e-mail 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 e-mail 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 e-mail 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 e-mail 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 e-mail to the Problem owner.

# Change Reports

CSM provides the following OOTB Change [Reports](#):

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

# 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](#)

# Release Management

Release management is the process that ensures that builds are created, tested, and deployed without affecting the stability of existing Services.



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

# About Releases

A Release is the deployment of one or more Configuration Items (CIs) that are built, tested, and deployed together. Releases involve extensive planning, building, and testing to ensure that existing Services are not impacted by the deployment.

**Example:** A Change Request is logged to upgrade the SQL Server. A technician determines that a Release is required to implement the defined Change. The Release Team (ex: Knowledge Manager, Deployment Manager, Testing Manager) plans and tests the Release before deploying it to the organization.

In CSM, a Release is a Major Business Object provided as a Mergeable Application, or [mApp Solution](#).



**Note:** For more information about mApp Solutions, including how to apply a mApp Solution, refer to the [mApp Solution](#) documentation.

The default [Release Form](#) helps to create, manage, and track Releases:



The screenshot displays the CSM 9.5.0 Record Management interface for a release titled "Upgrade to SQL Server 2014". The interface is divided into several sections:

- Quick Info Tile (Left):** Shows the release ID "Release 10405", status "New", priority "Urgent", and 3 open tasks. It lists requestors Gina Mehra and Clair Wu, along with options to "Take Ownership" and "E-Mail Release Team".
- Workflow Bar (Top):** A horizontal bar with steps: Plan, Build, Test, Document, Approve, Deploy, Review. The current step is "Document".
- Main Pane (Right):** Contains a "Release Details" form with fields for Title, Priority (Urgent), Risk (High), Category (Major), Type (Full), Version (5.0), and Planned Start/End dates (5/31/2014 to 6/1/2014). It also includes a "Description" field with the text "Upgrading the SQL Server from the 2012 version to 2014 version.", a "Scope" field with "Affects all Enterprise Apps that use the SQL Server Database.", and a "Justification" field with "Development requires access to new SQL features." A "Risk Analysis: High" alert is present.
- Build Release Package (Bottom Right):** A form for building the release package with fields for Short Description ("QL Server 2014"), Build Version ("20140512-01"), Build Location ("D:\Installers\SQLServer\SQL2014-x64.exe"), and Destination ("\\appServer\Program Files\SQL Server").
- Table (Bottom Left):** A table with columns "Build Version", "Short Description", "Build Location", and "Destination". It contains one row: "20140512-01", "QL Server 2014", "D:\Installers\SQLServer\SQL2014-x...", and an empty destination field.

- The Main Pane displays dynamic embedded forms as you move through the workflow. You can toggle between a simple Step View form and a more detailed read-only Expanded View form.
- The Quick Info Tile displays important at-a-glance information, such as Release ID, Status alert bar (current status), Priority alert bar, Open Tasks alert bar, Requestor, Record Ownership, and common operations (I Want To section). A workflow bar tracks the Release as it progresses through the [Release workflow](#) phases:
  - Plan
  - Build
  - Test
  - Document
  - Approve
  - Deploy


- Review
- The Arrangement dynamically displays linked records (child records) that are in a relationship with the Release (parent record), such as [Journals](#) (to track notes, history, etc.), [Change Requests](#), Release CIs, Service Schedule, Release Team, Tasks/Milestones, Build Package, Release Test, Approvals, and Deploy Package.


## Release Good to Know

- Search for one or more Releases that meet a specific criteria by running a [Quick Search](#) or [Search Group](#).
- Since a Release can be the implementation of one or more Change Requests, a Release can also be created from a Change Request by clicking **File>New>New Release** from the CSM menu bar, pressing **CTRL+SHIFT+R**, or clicking the **Create New Release** link in the Change Request Actions section of the Task Pane. When submitted from a Change Request, the Release inherits specific record information, including Requestor, Title, Description, and associated CIs.
- The Release form's Main pane toggles between two embedded forms: a simple Step View form and a read-only Expanded View form that displays all Release information on a single form.
- View additional form information and helpful tips by clicking the **INFO** button located on the title banner of the form.
- CSM implements several default Actions/One-Step Actions to make Release Management more efficient. For detailed 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).

- CSM provides several default Automation Processes to automate Release Management. For more information, refer to the [Automation Process](#) documentation.
- If enabled (via an Automation Process), e-mail notifications are automatically created and sent to:
  - Release owner to notify him of assignment.
  - Release Team to notify them of ownership.
  - Release Team to notify them of a new build.
  - Release Team to notify them of build test results.
- Journals track what occurs during the record's lifecycle (ex: 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 Quick Info Tile displays important at-a-glance information, such as Release ID, Status alert bar (current status), Priority alert bar, Open Tasks alert bar, Requestor information, [Record Ownership](#), and common operations (I Want To section).
- The workflow bar tracks the Release as it progresses through the [Release workflow](#) phases. Dark gray indicates the current phase.
- The Main Pane displays embedded forms used to create the Release. The Main Pane toggles between two embedded forms: a simple Step View form and a more detailed Expanded View form (read-only).

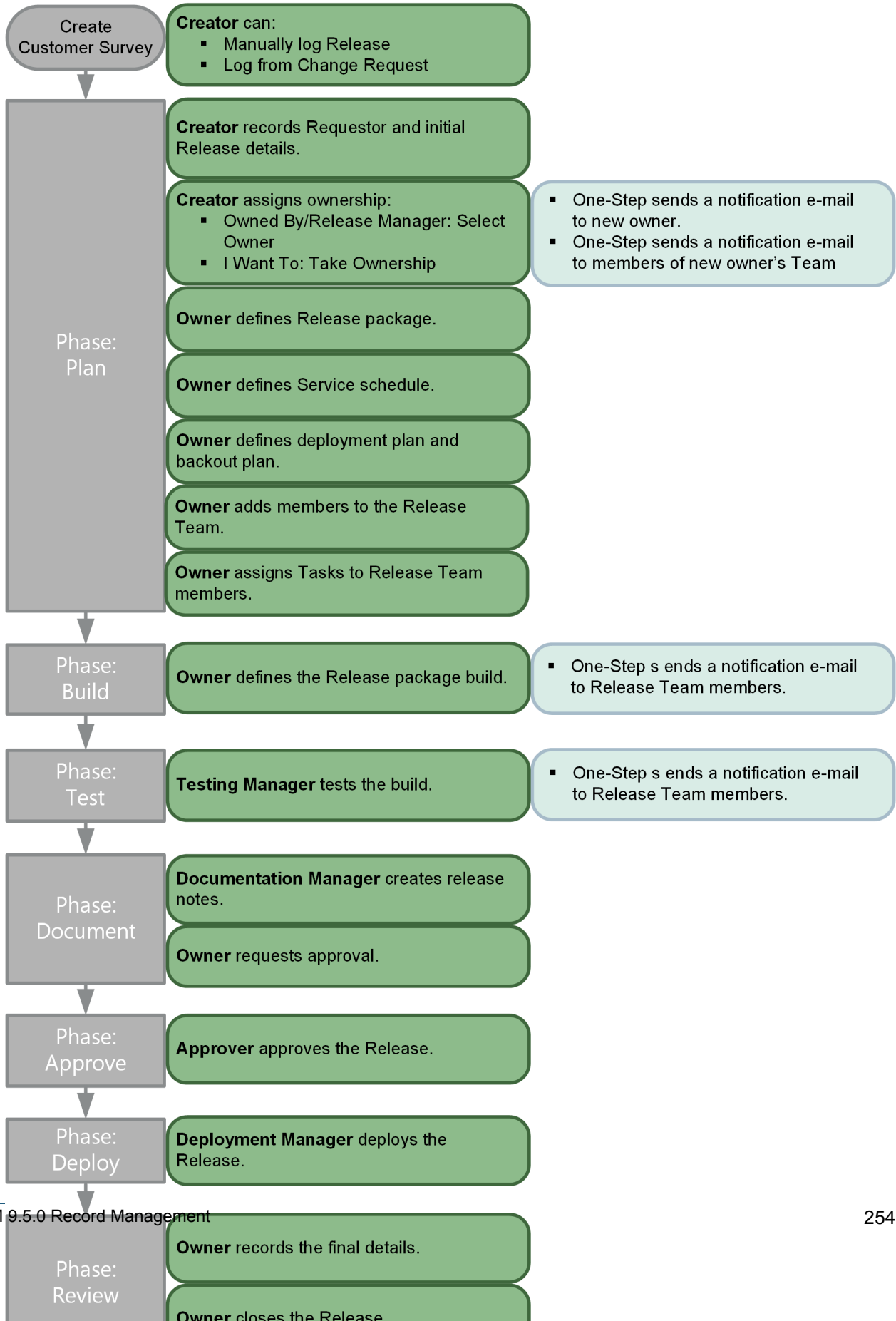
- The Arrangement dynamically displays linked child records, such as Journals (to track comments and important field and status changes), Approvals (to track who approved the Release and when), and forms that display as the Release progresses through its workflow.
- Fields:
  - Required fields are often conditional, meaning some are required to save a record, some are required to change the status of a record, some are required to "close" the record, etc. You will be reminded when fields are required, either by a red box around the field or by a reminder message.
  - Use [Rich Text fields](#) to use formatting and image/screenshots to complement the text. To format the text or embed an image, click the **Zoom** button .
  - Some validated fields can recognize what you are typing and will suggest a value for you (ex: Type "P" into the field; CSM will suggest the first item it finds that starts with the letter P). Use your 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.



**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 (ex: Major).

## Release Workflow

The following figure shows a high-level Release process workflow in the default system.





**Note:** CSM uses several features to manage the Release workflow (ex: The Release Form helps create and manage Releases, [One-Step Actions](#) help move the Release through its workflow, [Automation Processes](#) notify stakeholders via e-mails).

## Contributors

A Release typically has several contributors. Depending on your workflow and the size of your company, many of these contributors might be combined into one person:

- **Requestor:** Person who initiates the Release. This is typically a technician or owner of the associated Change Request.
- **Creator:** User who first creates the Release. This is typically a technician.
- **Owner/Release Manager:** User who manages the Release. This is typically a technician; the level varies depending on tiered support.
- **Task Owner:** User to whom Tasks are assigned in order to help deploy the Release.
- **Testing Manager:** User who manages the Test phase of the Release.
- **Documentation Manager:** User who creates the Release Notes or other documentation for the Release and communicates the information to the Knowledge Manager and Training Manager.
- **Knowledge Manager:** User who communicates release note data to the Knowledge Team.
- **Training Manager:** User who communicates release note data and incorporates the new information into training materials.
- **Approver:** User who ensures that the Release is ready for deployment. This is typically a member of the Knowledge Team.
- **Deployment Manager:** User who manages the deployment of the Release.
- **Stakeholder:** User/Customer with an interest in the outcome of the Release.

## Phases

The Release workflow is broken down into the following phases:

1. **Plan:** Creator records the Requestor and initial details, and then assigns an owner. Owner defines the Release Package, Service Schedule, and Release Plans. Owner adds members to the Release Team, and then assigns Tasks to Release Team members.
2. **Build:** Owner creates one or more builds of the Release Package.
3. **Test:** Test Manager tests the Release build(s) in a test environment that duplicates the live environment.
4. **Document:** Documentation Manager creates Release Notes, and then the owner requests approval.
5. **Approve:** Approver makes a decision (approves, denies, abstains) regarding the deployment of the Release build(s) to the live environment.
6. **Deploy:** Deployment Manager deploys the Release to the live environment.

7. **Review:** Owner records the final details, and then closes the Release.

## Statuses

A Release progressing through the workflow encounters the following statuses:



**Note:** Release statuses do not align with Release phases.

1. **New:** Release is being created, recorded (initial details), and assigned to an owner.
2. **Planning:** Release Package, Service Schedule, and Release Plan are being planned. Release team is assigned. Tasks are assigned.
3. **Building:** Release build is being defined.
4. **Testing:** Release build is being tested.
5. **Documenting:** Release Notes are being defined.
6. **Approving:** Release is being approved.
7. **Deploying:** Release is being deployed.
8. **Reviewing:** Release is being reviewed.
9. **Cancelled:** Release is cancelled.
10. **Closed:** Release is closed.



# Creating Releases

The following instructions are available to walk you through the steps to create a new Release using our default workflow:

- [Create a Release](#): Typical step-by-step instructions for creating a Release.

# Create a Release

The following procedure walks you through the typical steps to create a Release.

## To create a Release:

1. On the [CSM Desktop Client toolbar](#), click **New>New Release**.


The Release Record is created with a unique ID and a status of New. The Release enters the Plan phase.

The screenshot displays the 'Release 10405' creation interface. The top navigation bar shows the current phase as 'Plan', with other phases like 'Build', 'Test', 'Document', 'Approve', 'Deploy', and 'Review' available. The 'Release Title' field is empty. The 'Priority' is set to 'New' (indicated by a green bar). The 'Risk' is set to 'Low' (indicated by a red bar). The 'Category' and 'Type' are also set to 'Low'. The 'Version' field is empty. The 'Primary CI' field is empty. The 'Planned Start' and 'Planned End' fields are empty. The 'Risk Analysis' section includes a 'Due Date' field, a 'Description' field, a 'Scopes' field, and a 'Justification for release and any associated risks' field. The bottom section shows 'Journals' and 'Change Requests' with a message: 'There are currently no records'.


2. The creator records the initial details.
  - a. Requestor (in the Quick Info Tile): Provide the **name** of the person who initiated the Release, and then press **ENTER** or **TAB** to search for the User Record.
  - b. Title: Provide a **title**.
  - c. Priority: Select a **priority** for the Release.
    - i. Select the **Priority** drop-down to reveal the Priority Matrix, and then click a **priority number**.

The priority is displayed in the Priority alert bar of the Quick Info Tile. The color (red/orange/green) indicates the level of priority.




- d. Risk: Select a **risk level** from the drop-down.
  - e. Category: Select a **category** from the drop-down.
  - f. Type: Select a **type** of deployment.
  - g. Version: Provide the **version** of the Release.
  - h. Primary CI: Select an affected CI:
    - i. Click the **CI Selector** button  to launch the CMDB window and select a CI.

The CI record appears in the Configuration Items tab (Arrangement area).

    - i. Impact Analysis: Click this **button** to view a Configuration Map of CIs that are affected by the Release.
  - i. Planned Start: Click the **Date Selector** button  to access the Calendar, and then select the **day** in which you plan to begin the Release process.
  - j. Planned End: Click the **Date Selector** button to access the Calendar, and then select the **day** in which you plan to deploy the Release.
  - k. Release Calendar: Click this **button** to open the Change/Release Calendar.
    - l. Due Date: Click the **Date Selector** button to access the Calendar, and then select the **day** in which the Release is due.
  - m. Description: Provide a **description** of the Release.
  - n. Scope: Select a **scope** for the Release.
  - o. Justification for Release and any associated risks: In the drop-down a **justification** and any **risks** that may occur during the Release process.
3. Creator assigns an Owner.
- a. Click one of the Ownership Links in the Quick Info Tile (Owned By/Release Manager section). Ownership is required:

Owned By/Release Manager: [Assign To...](#)



- [select owner](#) -
- [select team](#) -
- no phone on record -
- no e-mail on record -

**I Want To:**

[Take Ownership](#)       Show All Tabs

[E-Mail Release Team](#)       Show Related Tabs

[Notify Task Owners to Update Tasks](#)

[View Detailed Date/Time Information](#)

4. Owner builds the Release Package.
  - a. Click the **Define Package** button on the Release Details form.

The Release Units form opens and the Release status changes to Planning.

Plan Build Test Document Approve Deploy Review

[Step View](#)  
[Expanded View](#)


Release Title: Upgrade SQL Server 2014 Risk Analysis: High

INFO Release Units



Hardware       Documentation

Software       Training

*Please choose associated CI's on the Release CIs tab*

 View Impacted CI's


Hyperlinks to Release Build Documentation (if applicable)

 Release Details
Schedule Service 

- b. Define the Release Package.
      - i. Select **Release Package units** (components of the package) by selecting the corresponding check box.
    - c. Owner adds additional affected CIs.
      - i. Click the **Release CIs** tab in the Arrangement to open the CI grid.

- ii. Click the **Add a Configuration Item** button  to launch the CMDB window, where you can select a CI.

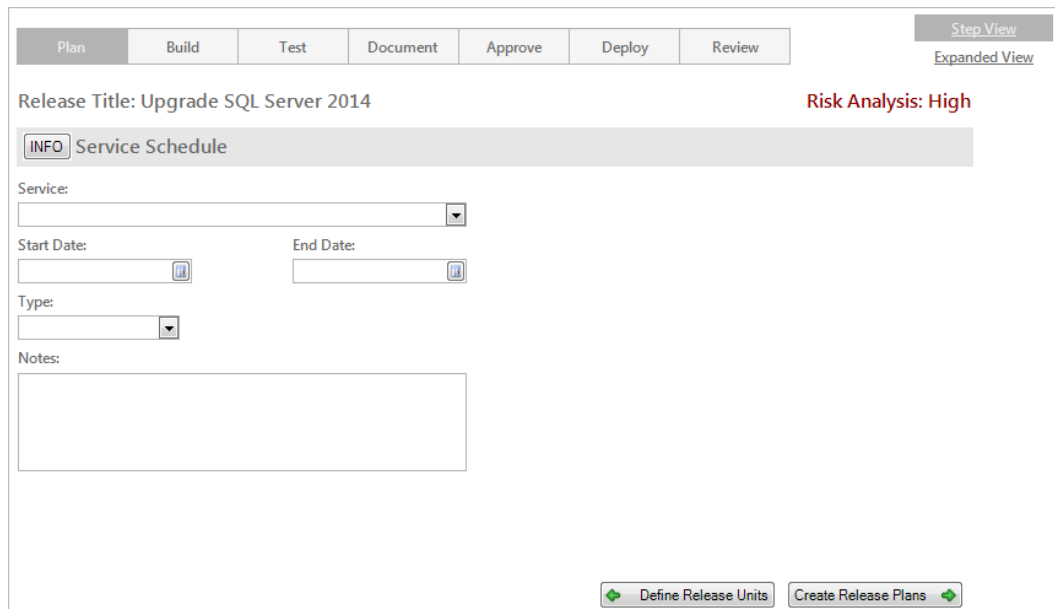
The selected CI record appears in the Configuration Items tab.

- iii. View Impacted CIs: Click the **Visualization** button  to view affected CIs.
- iv. Hyperlinks to Build Documentation: Insert a **hyperlink** (Rich Text) to the documentation associated with the build, if applicable.

- d. Owner adds the Release to the Service Schedule.



- i. Click the **Schedule Service** button on the Release Units form.

The Service Schedule form opens in the Main Pane.



The screenshot shows the 'Service Schedule' form within a release titled 'Upgrade SQL Server 2014'. The form is part of a multi-step process (Plan, Build, Test, Document, Approve, Deploy, Review) and is currently in the 'Plan' step. The risk analysis is 'High'. The form includes the following fields and controls:

- Service:** A drop-down menu.
- Start Date:** A text input field with a date selector icon.
- End Date:** A text input field with a date selector icon.
- Type:** A drop-down menu.
- Notes:** A large text area for additional information.
- Buttons:** 'Define Release Units' and 'Create Release Plans' at the bottom right.

- ii. **Service:** In the drop-down, select the affected **Service**.
- iii. **Start Date:** Click the **Date Selector** button  to access the Calendar, and then select the first **day** in which the Service will be affected.
- iv. **End Date:** Click the **Date Selector** button  to access the Calendar, and then select the last **day** in which the Service will be affected.
- v. **Type:** Select the **type of disruption** the Release will have on the Service.
- vi. **Notes:** Provide any **additional information** about the Service Schedule.
- e. Owner defines a Release Plan.
  - i. Click the **Create Release Plans** button on the Service Schedule form.

The Release Plans form opens in the Main Pane.

Plan Build Test Document Approve Deploy Review Step View  
Expanded View

Release Title: Upgrade SQL Server 2014 Risk Analysis: High

INFO Release Plans

Deployment Plan: Backout Plan:

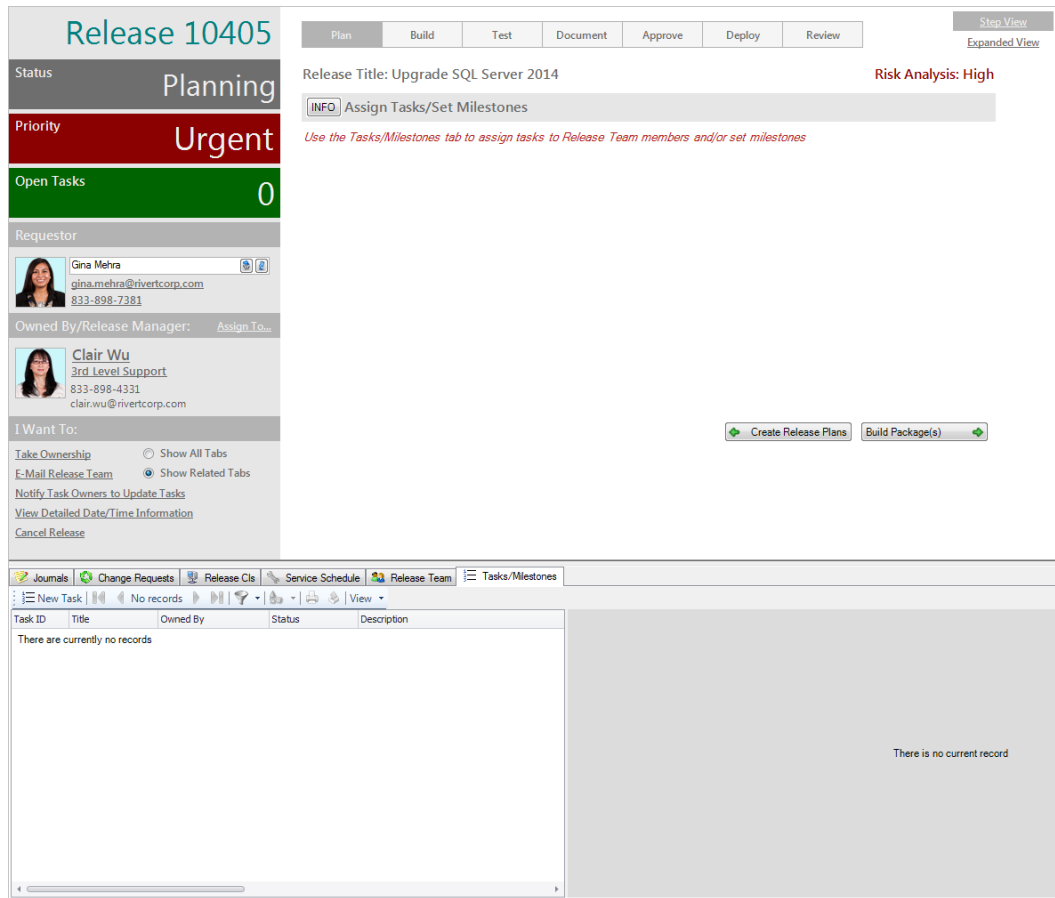
Schedule Service Assign Release Team

- ii. Deployment Plan: Provide the **deployment plan**.
  - iii. Backout Plan: Provide a **backout plan**.
- f. Owner defines a Release Team.
- i. Click the **Assign Release Team** button on the Release Plans form.
 

The Release Team form opens in the Main Pane and the Release Team tab appears in the Arrangement.
  - ii. Click the **New Release Team** button in the Release Team tab of the Arrangement.
 

The Release Team Member form opens.
  - iii. Send Notification E-mails: Select the **check box** to indicate that the User should receive Release updates via e-mail.
  - iv. Name: Provide the **name** of a User.
  - v. Role: In the drop-down, select the **role** of the User.
  - vi. E-mail: Provide the **e-mail address** of the User.
  - vii. Phone Number: Provide the phone number of the User.
  - viii. Notes: Provide any **additional information** about the User.
- g. Owner assigns Tasks to Release Team members.
- i. Click the **Assign Tasks** button on the Release Team form.
 

The Assign Tasks/Set Milestones form opens in the Main Pane and the Tasks/Milestones tab opens in the Arrangement.



- ii. Click the **New Task** button in the Tasks/Milestones tab of the Arrangement.

The Task form opens in the Arrangement.

- iii. Complete a **Task form** for each Task.

The priority is displayed in the Priority alert bar of the Quick Info Tile. The color (red/orange) indicates whether or not there are open Tasks. If there are no open Tasks, the alert bar is green. If there are one to five open Tasks, the alert bar is orange. If there are more than five open Tasks, the alert bar is red.



- 5. Owner defines the Release Package build.
  - a. Click the **Build Package(s)** button on the Assign Tasks/Set Milestones form.

The Build Package(s) form opens in the Main Pane, the Build Package tab appears in the Arrangement, and the Release enters the Build phase.

The screenshot displays the 'Release 10405' interface. At the top, there are tabs for Plan, Build, Test, Document, Approve, Deploy, and Review. The 'Build' tab is selected. The release title is 'Upgrade SQL Server 2014' and the risk analysis is 'High'. The status is 'Building' and the priority is 'Urgent'. There are 3 open tasks. The requestor is Gina Mehra, and the release manager is Clair Wu. The 'Build Package' tab is active, showing a table with columns for Build Version, Short Description, Build Location, and Destination. The table is currently empty, displaying 'There are currently no records'. Buttons for 'Define Package Build(s)' and 'Create / Run Test Plans' are visible.

- b. Click the **New Release Package Build** button in the Build Package tab of the Arrangement.
    - The Build Release Package form opens in the Arrangement.
  - c. Short Description: Provide a **brief description** of the build.
  - d. Build Version: Provide the **version** of the build.
  - e. Build Location: Provide the **location** of the build.
  - f. Destination: Provide the **location** where the build will be stored.
6. Testing Manager tests deployment of the build.
- a. Click the **Create/Run Test Plans** button on the Build Package(s) form.

The Test Script(s) form opens in the Main Pane, the Release Test tab appears in the Arrangement, the Release status changes to Testing, and the Release enters the Test phase.



**Release 10405**

Status: **Testing**

Priority: **Urgent**

Open Tasks: **3**

Requestor: Gina Mehra (gina.mehra@rivertcorp.com)

Owned By/Release Manager: Clair Wu (3rd Level Support)

Release Title: Upgrade SQL Server 2014

Risk Analysis: High

Testing Status:

- 0 Test Events
- 0 Passed
- 0 Failed
- 0 Not Run

Release Package Builds need to be tested before deployment

Build Release Package | Create Release Notes

Test Title	Test Start Date Time	Build Version	Owned By
There are currently no records			

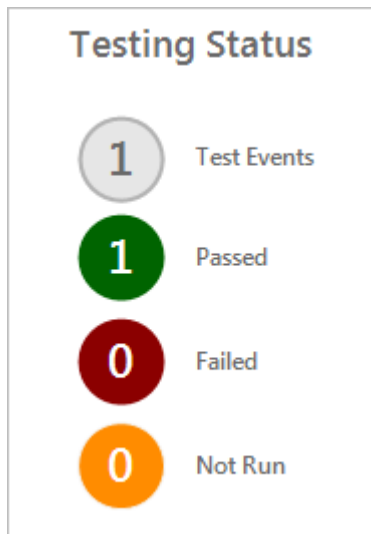
- Click the **New Release Test** button in the Release Test tab of the Arrangement.
  - The Release Test form opens in the Arrangement.
- Test Title: Provide a **title** for the test.
- Build Version: Select a **build version** from the drop-down.
- Release Location: Provide the **location** of the test Release.
- Test Script: Provide the **test script**.
- Expected Results: Provide the **expected result** of the test.
- Tester: Provide the **name** of the tester.
- Test Status: Select the **status** of the test.
- Test Start Date Time: Click the **Date Selector** button to access the Calendar, and then select the **day** in which you begin the test.
- Test End Date Time: Click the **Date Selector** button to access the Calendar, and then select the **day** in which you end the test.

- I. Test Disposition: Select the **disposition** (outcome) of the test.

CSM automatically sends an e-mail to Release Team members to notify them of the test outcome.

- m. Actual Results: Provide the **result** of the test.

The Testing Status icons indicate the number of Test Events and their status (Passed, Failed, Not Run).



**Note:** If the build fails testing, click the Create New Build link in the Quick Info Tile to return to the Build phase, or click the Cancel Release link to move to the Review phase.

7. Documentation Manager creates Release Notes.
  - a. Click the **Create Release Notes** button on the Test Script(s) form.

The Release Notes form opens in the Main Pane, the Release status changes to Documenting, and the Release enters the Document phase.

The screenshot displays a software release management interface. At the top, a navigation bar contains tabs for 'Plan', 'Build', 'Test', 'Document' (which is the active tab), 'Approve', 'Deploy', and 'Review'. To the right of these tabs are links for 'Step View' and 'Expanded View'. Below the navigation bar, the 'Release Title' is 'Upgrade SQL Server 2014', and the 'Risk Analysis' is 'High'. A section titled 'Release Notes' is highlighted in grey, with an 'INFO' icon to its left. Below this section, there is a text input field for 'Author:' and a larger text area for 'Release Notes:'. At the bottom right of the form, there are two buttons: 'Create / Run Test Plans' and 'Obtain Approval'.

- b. Author: Provide the **name** of the author.
  - c. Release Notes: Provide the **Release Notes**.
8. Owner requests approval for the Release.
- a. Click the **Obtain Approval** button on the Release Notes form.

The Release Approval form opens in the Main Pane, the Approvals tab appears in the Arrangement, and the Release enters the Approve phase.

**Release 10405**

Status: **Approving**

Priority: **Urgent**

Open Tasks: **3**

Requestor: **Gina Mehra**  
gina.mehra@rivertcorp.com  
833-898-7381

Owned By/Release Manager: **Clair Wu**  
3rd Level Support  
833-898-4331  
clair.wu@rivertcorp.com

I Want To:  
 Show All Tabs  
 Show Related Tabs  
[E-Mail Release Team](#)  
[Notify Task Owners to Update Tasks](#)  
[View Detailed Date/Time Information](#)  
[Cancel Release](#)

Release Title: Upgrade SQL Server 2014 Risk Analysis: High

INFO Release Approval

**Approval Status**

- 1 Pending
- 0 Approved
- 0 Denied
- 0 Abstained

Approval for deployment is required before proceeding

[Create Release Notes](#) [Deploy Package\(s\)](#)

ID	Status	Deadline	Approver	Details
11128	Waiting		Gina Mehra	Upgrade SQL Server 2014

**Approval 11128** Status: Waiting

Approver Name: Gina Mehra Approval Team: [Dropdown]

[Approve](#) [Deny](#) [Abstain](#)

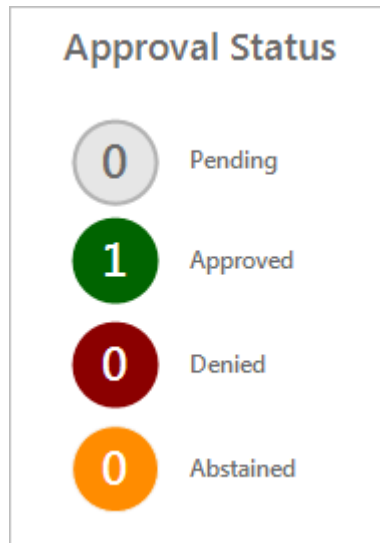
Deadline: [Field]

Details: Upgrade SQL Server 2014

Comments: [Text Area]

9. Approver approves the Release.
  - a. In the Approval grid, click an **Approval Record** to open the form.
  - b. (Optional) In the Comments field, provide your **feedback**.
  - c. Click **Approve**.

The Approval Status icons indicate the number of pending Approvals and their status (Approved, Denied, or Abstained).



10. Deployment Manager deploys the Release.

- a. Click the **Deploy Package(s)** button on the Release Approval form.

The Deployment(s) form opens in the Main Pane, the Deploy Release Package tab opens in the Arrangement, and the Release enters the Deploy phase.

- b. In the Deploy Package grid, click a **Release Package** record. The Build Version and Short Description fields are autopopulated.
- c. Deployment Started: Click the **Date Selector** button to access the Calendar, and then select the **day** in which you start the deployment before updating the time.
- d. Deployment Finished: Click the **Date Selector** button to access the Calendar, and then select the **day** in which you end the deployment before updating the time.
- e. Disposition: Select the **disposition** (outcome) of the deployment.

The Deployment Status icons indicate the number of pending deployments and their status (succeeded, failed, cancelled).

- f. Details: Provide any **additional information** about the deployment.

11. Owner completes the final details reviews the Release.

- a. Click the **Review Release** button on the Deployment(s) form.

The Release Details form opens in the Main Pane and the Release enters the Review phase.

Plan	Build	Test	Document	Approve	Deploy	Review	Step View
							Expanded View
Release Title: Upgrade SQL Server 2014						Risk Analysis: High	
<b>INFO</b> Release Details							
Planned Start Date:		Planned End Date:					
5/31/2014		6/1/2014					
Actual Start Date:		Actual End Date:		Final Disposition:			
				.			
Review Notes/Lessons Learned:							
Duration				Build Packages: 1			
Planned (days): 1				Deployed: 1			
Actual (days): 0				Failed: 0			
Completed: 0 days early				Cancelled: 0			
Config Items: 3				Test Events: 1			
Service:				Passed: 1			
Enterprise Apps				Failed: 0			
Blackout: 24 hours				Not Run: 0			

- b. Actual Start Date: Click the **Date Selector** button to access the Calendar, and then select the **date and time** in which you actually started the Release process.
  - c. Click the **Date Selector** button to access the Calendar, and then select the **date and time** in which you actually ended the Release process.
  - d. Final Disposition: Select the **disposition** (outcome) of the Release.
  - e. Review Notes/Lessons Learned: Provide any **additional information** about the Release.
12. Owner closes the Release.
    - a. Click the **Close Release** button on the Release Details form.

The Release status changes to Closed.

# Release Design Ideas

CSM provides a default Release workflow with all the items you need to successfully create Releases. 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.
- **Statuses:** Change [Release statuses](#) and/or the [One-Step Actions](#) that are initiated when a Release enters each status.
- **Form:** Change the form theme (background and text color), tab order, and size. Change the threshold and/or colors for priority and risk.
- **Actions and One-Step Actions:** Create [Actions/One-Step Actions](#) to automate your workflow (ex: Add a button that Tweets the final disposition of the Release).
- **E-mail:** Change the templates that are used to create the e-mails sent by [Automation Processes](#) (ex: Notify Release Team of New Build). 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 send notification e-mails (ex: Notify Release Team of New Build).
- **Field Value Options:** Use Table Management to add/edit Lookup Object values for use in drop-down fields (ex: Role).

## Release Features

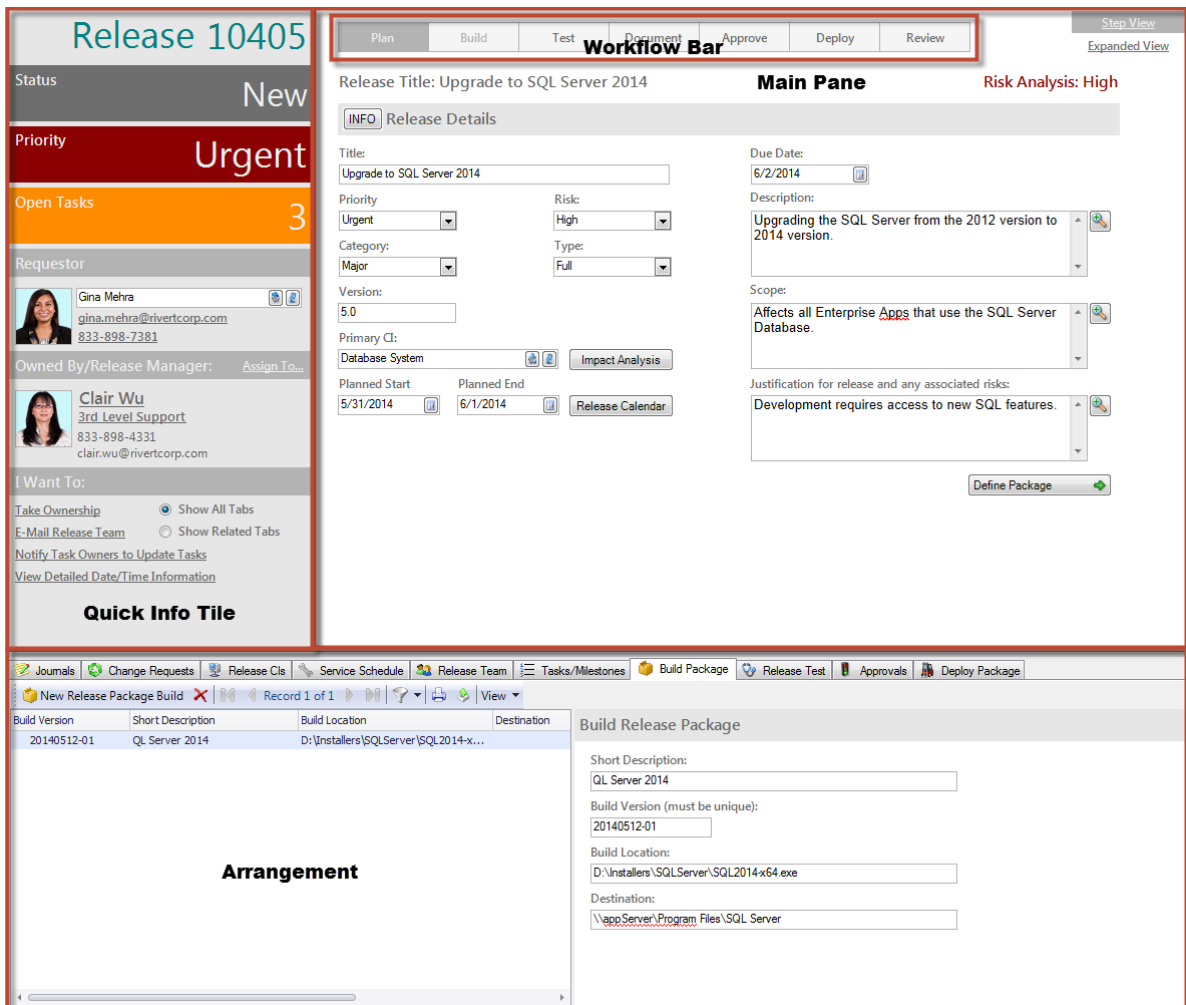
CSM provides the following tools to help manage Releases:



# Release Form

Use the Release Form to create, edit, and track Releases. The form is made up of four main areas:

- **Quick Info Tile:** Displays important at-a-glance information, such as Release ID, Status alert bar (current status), Priority alert bar, Open Tasks alert bar, Requestor information, Record Ownership, and common operations (I Want To section).
- **Workflow Bar:** Tracks the Release as it progresses through the Release workflow phases. Dark gray indicates the current phase.
- **Main Pane:** Displays embedded forms used to create the Release. The Main Pane toggles between two embedded forms: a simple Step View form and a more detailed Expanded View form (read-only).
- **Arrangement:** Dynamically displays linked child records, such as Journals (to track comments and important field and status changes), Approvals (to track who approved the Release and when), and forms that display as the Release progresses through its workflow.



The following table describes important fields on the form:

Field	Description	Comments
<b>Quick Info Tile</b>	Important at-a-glance information, such as Release ID, Status alert bar, Priority alert bar, Open Tasks alert bar, Requestor information, Record Ownership, and common operations (I Want To section).	
Release	Record type.	CSM automatically assigns the Record Type based on type of record created (New>Release).
ID	Unique record identifier (ex: 10405).	CSM automatically assigns the ID when the Release is created.
<b>Status alert bar</b>	Current status of the Release as it progresses through the Release workflow.	Release statuses align with Release phases, but this is not the case in every process (ex: Incident phases are different than Incident statuses).
Status	<p>Statuses include:</p> <ul style="list-style-type: none"> <li>• <b>New:</b> Release is being created, recorded (initial details), and assigned to an owner.</li> <li>• <b>Planning:</b> Release Package, Service Schedule, and Release Plan are being planned. Release team is assigned. Tasks are assigned.</li> <li>• <b>Building:</b> Release build is being defined.</li> <li>• <b>Testing:</b> Release build is being tested.</li> <li>• <b>Documenting:</b> Release Notes are being defined.</li> <li>• <b>Approving:</b> Release is being approved.</li> <li>• <b>Deploying:</b> Release is being deployed.</li> <li>• <b>Reviewing:</b> Release is being reviewed.</li> <li>• <b>Cancelled:</b> Release is cancelled.</li> <li>• <b>Closed:</b> Release is closed.</li> </ul>	
<b>Priority alert bar</b>	The color (red/orange/green) indicates the level of priority.	Priority is defined using the Priority drop-down (Priority Matrix) in the Release Details section of the Main Pane.
<b>Open Tasks alert bar</b>	The color (red/orange/green) indicates whether or not there are open Tasks.	Tasks are assigned using the Task form in the Arrangement.

Field	Description	Comments
Requestor	Person who initiates the Release.	
Requestor Name	<p>Name of the Customer who initiated the Release.</p> <p>Provide a name in the Requestor field (ex: Gina), and then press <b>&lt;Enter&gt;</b> or <b>&lt;Tab&gt;</b> to locate the Customer Record.</p> <p><b>Note:</b> 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.</p>	After you select a Customer, the Photo, Phone, and E-mail fields are autopopulated with information from the Customer Record.
Avatar	Avatar (photo or image) of the Customer who initiated the Release.	<p>The Avatar, Phone, and E-mail fields are autopopulated with information from the Requestor's Customer Record.</p> <p>One-Step Action (Dial Customer Phone): Dials the Customer's phone number.</p> <p>One-Step Action (Follow-up E-mail): Creates a follow-up e-mail to send the Customer regarding a question or update about the Release. Allows the User to edit the e-mail before clicking Send. Attaches the e-mail to the Release History record.</p>
E-mail	<p>E-mail address of the Customer who initiated the Release.</p> <p>Click the <b>link</b> to create an e-mail addressed to the Customer (if e-mail is configured).</p>	
Phone	<p>Phone number of the Customer who initiated the Release.</p> <p>Click the <b>link</b> to dial the Customer if telephony is configured.</p>	

Field	Description	Comments
<b>Owned By/ Release Manager</b>	Record owner.	
Assign to	Click the <b>link</b> to select a User owner for the Release. 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.
User Owner -select owner-	Name of the User owner. Click the <b>link</b> to first select a Team and then a User owner (User is limited by Team).  Typically, the owner is the Reviewer and a member of the Support Team.	One-Step Action (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.
Team Owner -select team-	Name of the owner Team. Click the <b>link</b> to select a Team owner.	One-Step Action (Assign to Team):  Launches the Choose Team window, where a User can choose an Owned By Team for the record.
Avatar	Photo/graphic associated with the User owner (from User profile).	
<b>I Want To</b>	Common operations.	
Take Ownership	Click the <b>link</b> to make yourself (Current User) the User owner for the Release.	One-Step Action (Take Ownership):  Makes the Current User the Primary User of the record.
Notify Task Owners to Update Tasks	Click the <b>link</b> to define and send an e-mail all Release Team members.  <b>Note:</b> Team members must have a selected Send Notification E-mail check box.	One-Step Action (E-mail Release Team): Prompts the User to define and send an e-mail to all Project members that are selected to receive notification e-mails (Send Notification E-mail checkbox).

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Field	Description	Comments
View Detailed Date/Time Information	Click the <b>link</b> to open the Information window, where you can view created date and time, creator name, and last edited date and time. Time Date/time format is MM/DD/YYYY HH:MM.	One-Step Action (Date Time Info Popup): Displays details for all the date/timestamps to give a historical view.

## Release Journals

CSM provides the following OOTB Release Journal types:

- **Journal - Note:** Tracks User notes/comments.
- **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](#).
- **Journal - Remote Support History:** Tracks chat/remote support sessions.



**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 clicking the Journals tab in the parent record's Arrangement).

# Release One-Step Actions

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

One-Step Actions	Description/Actions	Associations	Executed From
<b>Status</b>			
Alt Step from Relationship	Conditionally change the Release status to next logical status (defined by the Release Status values in Table Management) and/or initiate the next appropriate One-Step Action.	Release	Release Form: <Status> link (I Want To section)  <b>Note:</b> The bottom two Status links (I Want To) are dynamic and based on the Alt 1 Status and Alt 2 Status defined in the Release Status Lookup Table in Table Management.
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.	Release	Release Form: Form buttons
Set to Complete	Changes the Release status to Closed and sets the form view to the Expanded View (read-only).	Release	Release Form: Close Release button
Cancel Release	Changes the Release status to Cancelled.	Release	Release Form: Cancel Release (I Want To section)
<b>Form</b>			
<b>Ownership</b>			
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.	Release	Release Form: Assign To link
Select 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.	Release	Release Form: Select Owner link

Select Team	Launches the Choose Team window, where a User can choose an Owned By Team for the record.	Release	Release Form: Select Team link
Take Ownership	Makes the Current User the Primary User of the record.	Release	Release Form: Take Ownership link (I Want To section)
<b>Other</b>			
E-Mail Release Team	Prompts the User to define and send an e-mail to all Project members that are selected to receive notification e-mails (Send Notification E-mail checkbox).	Release	Release Form: E-mail Release Team link (I Want To section)
Notify Task Owners to Update Status	Sends an e-mail to Task owners asking them to update their open Tasks.	Release	Release Form: Notify Task Owners to Update Tasks link (I Want To section)
DateTime Info Popup	Displays details for all the date/ timestamps to give a historical view.	Release	Release Form: View Detailed Date/Time Information link (I Want To section)

A full list of One-Steps 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-Steps associated with a particular type of Business Object.



## Release Search Groups

CSM provides numerous OOTB Release [Search Groups](#). Notable Release Search Groups include:

Search Group	Returns	Association	Executed From
Closed Releases	All closed Releases.	Release	Search Manager, Widgets
Closed Early Successful Releases	Closed Releases that are completed before the due date and are marked as successful.	Release	Search Manager
Closed Late Releases	Closed Releases that are completed after the due date.	Release	Search Manager,
Closed Releases with Failed Builds	Closed Releases where none of the builds are successful.	Release	Search Manager
Closed Releases with Unsuccessful/ Incomplete Tests	Closed Releases where at least one Release test disposition is failed.	Release	Search Manager
Closed Unsuccessful Releases	Closed Releases with a final disposition of either Failed or Cancelled.	Release	Search Manager
Open Releases	All open Releases.	Release	Search Manager
Open Releases Awaiting Approval	Open Releases with a status of Waiting.	Release	Search Manager, Metrics
Open Releases with Failed Build Deployment	Open Releases with a build disposition of failed.	Release	Search Manager
Specific Closed Release	Closed Releases that meet a User-provided Release ID (prompt).	Release	Search Manager

## Release Automation Processes

CSM provides the following OOTB Release [Automation Processes](#):

Name	Description
Notify Release Owner of Assignment	When Ownership is assigned, the process initiates the Notify Owned By via E-mail One-Step Action, which sends a notification e-mail to the new owner.
Notify Release Team of Build Test Results	When a Test Disposition Field is selected, the process initiates the Notify Team of Test Results One-Step Action, which sends a notification e-mail to Release Team members.
Notify Release Team of New Build	When a new Release package build is created, the process initiates the Notify Team of New Build One-Step Action, which sends a notification e-mail to Release Team members.
Notify Release Team of Ownership	When Ownership is assigned, the process initiates the Notify Owned By Team via E-mail One-Step Action, which sends a notification e-mail to members of the owner's Team.

# 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).

In CSM, 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 toolbar, click **New>New Supplier**. A new Supplier Form displays.

The Supplier automatically enters the Evaluating phase of the workflow.

The Form Arrangement Pane contains tabs for quick reference of records related to the Supplier. The Manager can customize how many tabs are visible at one time by selecting boxes under the Tab Visibility section of the Quick Info Tile. 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 Quick Info Tile. For details on the completing the Supplier Scorecard, see Step 5.
  - As **Supplier Risk Assessments** are performed, they populate the **Supplier Risk Assessment** tab. 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 6.
  - **Service Impact Events** include anything that may impact the Suppliers ability to provide their specified service, these events can be manually inputted into the tab.
  - If a **Service Complaint** needs to be created against the Supplier, it can be done so through the **Service Complaints** tab.
  - The **Configuration Items** tab displays the Configuration Items that a Supplier's service supports.
2. Record basic Supplier details, contact information, and add a company logo in the Details section of the Supplier form.
  3. 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 CSM 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.

4. Assign a Manager to the Supplier in the Quick Info Tile.

- a. Click the **Select Owner** link to add a Manager to the Supplier and to denote the department.

The Manager section of the Quick Info Tile populates with the Manager's name and department.

- b. Click the **Take Ownership** link in the I Want To section to assign yourself as the owner of the Supplier record. The Supplier is then assigned to the User logged into CSM and viewing the Supplier Form.

5. Create a Supplier Scorecard.

- a. Click the **Create Scorecard** link in the Quick Info Tile.



**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 Quick Info Tile. "A" and "B" grades are green; "C" grades are orange.



**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.

6. Complete the Supplier Risk Assessment.

- a. Click the **Create Risk Assessment link** in the Quick Info Tile.

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 Quick Info Tile. "Low" Risk are green, "Medium" are orange, and "High" are red.

7. 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.



# 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 Grade alert bar in the Quick Info Tile of 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 in the Grade alert bar in the Quick Info Tile of the Supplier form.
- 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.

# Agreement Management

Agreement management is the process that allows Users to manage 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 [Search Group](#).
- 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 Supplier section of the Quick Info Tile. If sent using the Quick Info Tile, an e-mail template is used to auto-populate the e-mail with the Supplier's e-mail address, and a record of the e-mail will remain in the associated Agreement's history.
- 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 (ex: 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 Quick Info Tile (left) displays important at-a-glance information:
  - The Status bar displays the current status of the Agreement 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 Agreement to the next status.
  - The Supplier section displays the vendor who is providing the product or Service.
  - The Owned By section displays the current record owner. The creator of the Agreement is automatically assigned as the Owner. A new Owner can be assigned to the Agreement by clicking one of the ownership links in the Quick Info Tile.
- The workflow bar (top of Main Pane) indicates the current phase of the Agreement as it moves through its workflow. Dark gray indicates the current phase.

- 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-Steps documentation.



**Note:** A full list of One-Steps 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 (ex: Major).

# Create an Agreement

The following procedure provides steps for creating an Agreement.



## To create a new OLA:

1. On the [CSM Desktop Client toolbar](#), click **New>New Agreement>New OLA**.

A new OLA is created with a status of New. The creator of the OLA is automatically assigned as the Owner.

2. Assign a new Owner to the OLA by clicking one of the ownership links in the Quick Info Tile (Owned By or I Want To sections):
  - a. Take Ownership: Click the **link** to make yourself the Owner.
  - b. Owner Name: Click the **link** to select an Owner (User is limited by Team).
  - c. Owner Team: Click the **link** to select an Owner Team.
3. Select a **Supplier** in the Quick Info Tile (this field is required):
  - a. Supplier: Provide the **name** (ex: Hardware Support) of the Team that will be responsible for fulfilling the Agreement, and then press **Enter** or **Tab** to search for the Supplier Record. If an exact match is found, the Supplier fields are auto-populated with the Supplier's name, image, e-mail, and phone number.



**Note:** To browse for a Supplier or add a new Supplier Record, click the **Supplier Selector** 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 .

4. When ready, the Owner begins planning the OLA:
  - a. In the Status alert bar, click **Begin Planning**.

The Agreement status changes to Planning.





5. Provide details about the OLA:
  - a. Name: Provide a **name** for the OLA (this field is required).
  - b. Supplier Catalog Item Type: Select a **Supplier Catalog Item Type** from the drop-down (ex: Product or Service).
  - c. Supplier Catalog Item: Select the **Supplier Catalog Item** from the Selector tool (ex: 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.

- d. Description: Provide a **description** of the OLA.



- e. Start Date: Click the **Calendar Date Selector** button  to select a start date for the OLA.
  - f. End Date: Click the **Calendar Date Selector** button  to select an end date for the OLA.
  - g. Review Date: Click the **Calendar Date Selector** button  to select a review date for the OLA.
  - h. Scope: Provide the **scope** of the OLA.
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 (ex: 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. 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.
8. Provide Availability details:
- a. Service Availability: Provide the **time(s)** that the service is to be available.
  - b. Service Availability Exception(s): Provide the **exception(s)** for when the service will not be available.
  - c. Service Uptime: Provide the **uptime** for the service.
9. When the available information has been entered, the Owner activates the OLA:
- a. In the Status alert bar, click **Activate** to activate the OLA.  
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.

10. When the Agreement has been fulfilled, the Owner can Retire the OLA:
- a. In the Status alert bar, click **Retire** to retire the OLA.

The Agreement status changes to Retired.

11. The OLA 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 three main areas:

1. The Quick Info Tile displays important at-a-glance information based on the type of Agreement, such as the Agreement type (ex: Operational Level Agreement, Underpinning Contract), Status alert bar (current and next status), Supplier, Owned By, and common operations (I Want To section).
2. The Main pane displays detailed Agreement information based on the type of Agreement.
3. The Arrangement dynamically displays linked child records based on the type of Agreement, such as Terms, associated Supplier, and Journals.

The screenshot displays the 'OLA' (Operational Level Agreement) form. At the top, it shows the status as 'Active' with a 'Next Step' indicator. The left sidebar contains a 'Supplier' section for 'Hardware Support' and an 'Owned By' section for 'Henri Bryce'. The main content area is divided into several sections: 'Details' with fields for Name, Start/End Dates, Review Date, and Scope; 'Cost and Performance' with fields for Resolution Time, Units, Associated Cost, Business Hours, and SKJ Number; 'Terms' with 'Rules for Changes' and 'Rules for Termination'; and 'Availability' with 'Service Availability' and 'Service Uptime' fields. Three red circles with numbers 1, 2, and 3 are overlaid on the form to highlight specific areas.

The following table describes common fields on the Agreement Form:

Field	Description	Comments
Quick Info Tile	Important at-a-glance information, such as the Agreement type, Supplier, record ownership, and common operations (I Want To section).	
*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).
Image	Image associated with the Supplier.	The Image, Phone, and E-mail fields are auto-populated with information from the Supplier's Record.
E-mail	E-mail address of the Supplier associated with the Agreement.	
Phone	Phone number of the Supplier associated with the Agreement.  Click the link to dial the Supplier if telephony is configured.	
Owned By	Record owner.	Ownership is automatically assigned to the creator.
User Owner	Name of the User Owner. Click the <b>link</b> to first select a Team and then an Owner (User is limited by Team).	The creator of the Agreement is automatically assigned as the Owner.
Team Owner	Name of the Owned By Team. Click the link to select a Team owner.	
Avatar	Photo/graphic associated with the owner (from User profile).	
I Want To	Common operations.	
Take Ownership	Click the <b>link</b> to make yourself the User Owner of the Agreement.	

Field	Description	Comments
View Detailed Date/Time Information	Click the <b>link</b> to open the Information window, where you can view created date and time, creator name, and last edited date and time. Time Date/time format is MM/DD/YYYY HH:MM.	One-Step Action (Date Time Info Popup): Displays details for all the date/timestamps to give a historical view.
<b>Main Pane</b>	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 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.	
<b>Cost and Performance</b>		
Resolution Time	The negotiated and agreed upon resolution time.	
Resolution Units	The units to be applied to the resolution time.	
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.	
<b>Arrangement</b>	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

CSM provides the following Agreement One-Step Actions:

One-Step Actions	Description/Actions	Associations	Executed From
<b>Status</b>			
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			
<b>Ownership</b>			
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.	OLA or UC	Agreement Form: <Owner's Name> link
Assign to Team	Launches the Choose Team window, where a User can choose an Owned By Team for the record.	OLA or UC	Agreement Form: <Owner's Team> link
Take Ownership	Makes the Current User the Primary User of the record.	OLA or UC	Agreement Form: Take Ownership link (I Want To section)
<b>Supplier</b>			
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	Agreement Form: Supplier phone number
<b>I Want To</b>			
Date Time Info Popup	Displays details for all the date / time stamps to give a historical view of the Agreement.	OLA or UC	Agreement Form: View Detailed Date / Time Information link (I Want To section)
<b>Other</b>			

Update Costs when OLA Costs Change	<p>Updates record to reflect changes made to the Associated Cost field.</p> <p>Updates costs on associated Work Units and Service Catalog Templates.</p>	OLA	Agreement Form: One-Step Action runs automatically when OLA is saved.
Update Costs when UC Costs Change	<p>Updates record to reflect changes made to the Associated Cost field.</p> <p>Updates costs on associated Work Units and Service Catalog Templates.</p>	UC	Agreement Form: One-Step Action runs automatically when UC is saved.
Update Costs when Agreement Costs Change	<p>Updates record to reflect changes made to the Associated Cost field.</p> <p>Updates costs on associated Work Units and Service Catalog Templates.</p>	Agreement	Agreement Form: One-Step Action runs automatically when Agreement is saved.

A full list of One-Steps 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-Steps associated with a particular type of Business Object.



# Agreement Search Groups

CSM provides the following OOTB Agreement [Search Groups](#):

## Operational Level Agreements

Search Group	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

Search Group	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

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

# 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 the Create a Risk Assessment link in the I Want To section of the Quick Info Tile of 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.

# Service Catalog Template Management

Service Catalog Template management is the process that allows Users manage deliverables that are comprised of Work Units and available to Customers from the Service Catalog in the Customer Portal.



**Note:** A simple version of Service Catalog Template and Work Unit functionality is available as a mergeable application ([mApp Solution](#)).

## About Service Catalog Templates

A Service Catalog Template is a deliverable that is comprised of related Work Units and available to Customers from the Service Catalog in the Customer Portal. When a Service Catalog Template is selected, a Service Request is created and the associated Work Units transform into Tasks, which are required to close the Service Request. This allows you easily manage the Tasks required to fulfill common Service Requests.

In CSM, Service Catalog Template is a Major Business Object. The Service Catalog Template form allows users to view, create, track, and manage Service Catalog Templates. The Critical Path time will automatically create a cumulative process completion time based on attached SLAs, Work Units, and Dependencies.




**Note:** Service Catalog Template 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](#).

## Service Catalog Template Good to Know

- A Service Catalog Template is a deliverable that is comprised of related Work Units and available to Customers from the Service Catalog in the Customer Portal.
- The Critical Path Time is based on attached Work Units, Dependencies, and Incident SLAs.
- Search for one or more Service Catalog Templates that meet a specific criteria by running a [Quick Search](#) or [Search Group](#).
- Create a new Service Catalog Template by clicking New>New Service Catalog Template on the [CSM Desktop Client toolbar](#) or by clicking File>New>New Service Catalog Template from the [CSM Desktop Client menu bar](#).
- By default, Service Catalog Template uses the Incident Service and Category structure. Access Category options by clicking Tools>Table Management>Type>Incident Category.
- The OOTB system implements several Actions/One-Step Actions to make creating Service Catalog Templates 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 Description and Portal Description fields are [Rich Text fields](#). To format the text or embed an image, click the Zoom button .
  - The Title, Portal Title, Description, Portal Description, Service, Category, and Subcategory fields are required to save the record.
- [Secure](#) Service Catalog Template records by controlling who can view, create, and edit records.

# Creating Service Catalog Templates

The following instructions are available to walk you through the steps to create a Service Catalog Template (SCT) using our OOTB workflow:

- [Create a Service Catalog Template](#): Typical step-by-step instructions for creating an SCT.



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



# Create a Service Catalog Template

The following procedure walks you through the typical steps to create a Service Catalog Template.

## To create a Service Catalog Template:


1. On the [CSM Desktop Client toolbar](#), click **New>New Service Catalog Template**.

A new Service Catalog Template record is created with a unique ID and a status of New.



**Note:** The Critical Path will create a cumulative process completion time based on all attached SLAs, Work Units, and Dependencies. SCTs can be linked to Work Units and Incidents from within the SCT form, a Work Unit form, or an Incident form. The cumulative time will automatically populate in the Critical Path Quick Info Tile.


2. Complete the Title and Description section (all fields are required):
  - a. Title: Provide a **title** for the Service Catalog Template (example: New Employee Setup).
  - b. Portal Title: Autopopulates based on the Title field. Provide a different title for the Portal (Service Catalog page), if necessary.
  - c. Description: Provide a **description** for the Service Catalog Template (example: Create all necessary items for a new employee setup).
  - d. Portal Description: Autopopulates based on the Description field. Provide a different description for the Portal (Service Catalog page), if necessary.
3. Complete the classification section (the Service, Category, and Subcategory fields are required):
  - a. Service: Select the affected **Service** (example: Employee Support). An abbreviated read-only Service form displays in the Form Arrangement.

**Tip:** To view the detailed Service form, click the **Go to Record** button  in the Form Arrangement toolbar.

- b. Category: Select the affected Service **Category** (example: Add/Change).
  - c. Subcategory: Select the affected Service **Subcategory** (example: New Employee Setup).
  - d. Service Catalog Template Category: Select a **Service Catalog Template Category** (example: HR Process). This categorization allows Users to filter Service Catalog Templates for Search Groups and Reports.
4. Assign ownership in the Quick Info Tile:
    - a. (Optional) Assign a Business Owner by clicking the ownership link (Business Owner section):
      - Select Owner (User): Click this **link** to select a User owner.
    - b. Assign an IT Process owner (if different from the creator) by clicking one of the ownership links (IT Process Owner section):
      - Creator's name (example: Henri Bryce): Click this **link** to select a User owner.
      - Creator's Team (example: 3rd Level Support): Click this **link** to first select a Team owner.
  5. Add Work Units to the Service Catalog Template:

- a. Click the **Add a Work Unit** button in the Work Unit Functions section of the Main Pane or in the I Want To section of the Quick Info Tile.

The Work Unit Selector opens displaying available WUs.

- b. Select a **Work Unit** from the Grid. Linked Work Units will appear in the Work Unit tab as they are added to the SCT. To view the detailed Work Unit form, click the **Go to Record** button  in the Form Arrangement toolbar. The Work Units will then 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 Work Units are completed. Work Units with Dependencies are easily viewed in the Work Unit Order tab. Above, before the PC can get an Asset Tag, the laptop must first be acquired.

- c. (Optional) Manage Work Units in the Work Unit Functions section, these will not appear in the SCT unless the SCT has Work Units or Dependencies linked to it:
    - **Add a Work Unit:** Add additional Work Unit to the Service Catalog Template.
    - **Delete a Work Unit:** Remove a Work Unit to the Service Catalog Template.
    - **Reorder the Work Units:** Organize the order of the Work Units.
    - **Update Completion Times:** Automatically syncs Supplier Agreements with Work Units and updates the Critical Path Time.
    - **Add a Dependency:** Add a dependency to a Work Unit. The Work Unit that is depended upon must be completed before the dependent Work Unit can be completed.
    - **Remove a Dependency:** Remove an existing dependency.
    - **Add a Note to Work Unit Task:** Provide additional information related to the Work Unit. When the Work Unit becomes a Task, the defined note displays in the Description field on the Task.
    - **Remove a Note from Work Unit:** Remove an existing note from the Work Unit Task.
6. Activate the Service Template by clicking the **Next: Active** link in the Status bar.

The status changes to Active and the Service Catalog Template is available to Customers from the Service Catalog in the Customer Portal. When a Service Catalog Template is selected, a Service Request is created and the associated Work Units transform into Tasks, which are required to close the Service Request.



**Note:** To retire the Service Catalog Template, click the **Next: Retire** link in the Status bar.

# 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.

# Work Unit Management

Work Unit management is the process that allows Users to manage generic tasks that are required to fulfill a Service Request.



**Note:** A simple version of Service Catalog Template and Work Unit functionality is available as a mergeable application ([mApp Solution](#)).

## About Work Units

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.

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

The following procedure walks you through the typical steps to create a Work Unit.

## To create a Work Unit:

1. On the [CSM Desktop Client toolbar](#), click **New>New Work Unit**.

A new Work Unit 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 are required):
  - a. Name: Provide a **name** for the Work Unit (example: Acquire a Laptop).
  - b. Work Unit Category: (Optional) Select a **Work Unit Category** (example: Order product).
  - c. Work Unit Description: Provide a **description** for the Work Unit (example: Order a generic laptop).
  - d. Task Description (Displays on Task): Autopopulates based on the Work Unit Description field. Provide a different description for the Task, if necessary (example: Order a laptop from the lead vendor).
3. Assign ownership in the Quick Info Tile by clicking one of the ownership links:



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

- Assign to: Click the **link** to select a User owner . The Team owner is populated by the User owner's default Team.
  - Select Team: Click the **link** to first select a Team owner .
4. (Optional) Complete the Catalog Information section if you are using a Supplier Catalog Item:
    - a. Catalog Item: Select a **Catalog Item** (example: Generic Laptop)..
 

Catalog Item information (pulled from the Supplier Catalog Item record) displays in the Main Pane as read-only text, and the Supplier Catalog Item and Agreement records display as abbreviated read-only forms in the Form Arrangement.
    - b. (Optional) Manage the Catalog Item:
      - Change Supplier: Click the **link** in the I Want To section to open the Agreement Selector, where you can select an alternate Supplier (example: Viahouse Supplies).
      - The new Supplier information displays in the Main Pane. A warning icon and (Alternate Supplier) text displays in the Supplier Information heading to indicate the change.
      - Clear the Catalog Item: Click the **link** in the I Want To section to remove the data in the Catalog Information section, so that you can select a new Catalog Item.
  5. Activate the Work Unit by clicking the **Next: Set as Active** link in the Status bar.

The status changes to Active and the Work Unit is available to use for Service Catalog Templates. When a Service Catalog Template is selected, a Service Request is created and the associated Work Units transform into Tasks, which are required to close the Service Request.



**Note:** To retire the Work Unit, click the **Next: Retire Work Unit** link in the Status bar.

## Work Unit Features

CSM provides the following tools to help manage Work Units:

- [Form](#)
- [Search Groups](#)

# 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. Quick Info Tile: Displays important at-a-glance information (Status, assignment information, etc.).
2. Main Pane: Displays the main Form details and Fields.
3. Form Arrangement: Displays linked child records (ex: [Supplier Catalog Item](#), [Agreement \(OLA or UC\)](#), and [Service Catalog Templates](#)).

**Work Unit 18**

Status: **Active**  
Next: Retire Work Unit

Assigned To:  
**Sherri Williams**  
 2nd Level Support  
 833-898-1763  
 sherri.williams@RiverTCorp.com

I Want To:  
[Change Supplier](#)  
[Clear the Catalog Item](#)

**1**

---

**Basic Information**

Name:  Work Unit Category:

Work Unit Description:  Task Description (Displays on Task):

**2**

**Catalog Information**

Catalog Item:  Item Description: A basic laptop that is to be used by most employees. All laptops must come with Microsoft Windows and Microsoft Office. 4GB of RAM minimum.

Estimated Cost:

**Supplier Information (Alternate Supplier)**

Supplier:  Estimated Cost:

Agreement:  Delivery Time:

---

Supplier Catalog Item | Agreement | SCTs Using this Work Unit

Record 1 of 1

**Supplier Catalog Item**

Owned By:  
**Henri Bryce**  
 3rd Level Support  
 833-898-8787  
 henri.bryce@RiverTCorp.com

I Want To:  
[Change Lead Supplier](#)

**3**

**Details**

Name:  Item Type:

Description:

**Lead Information**

# Work Unit Search Groups

CSM provides the following OOTB Work Unit [Search Groups](#):

Search Group	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

# Service Cart Management

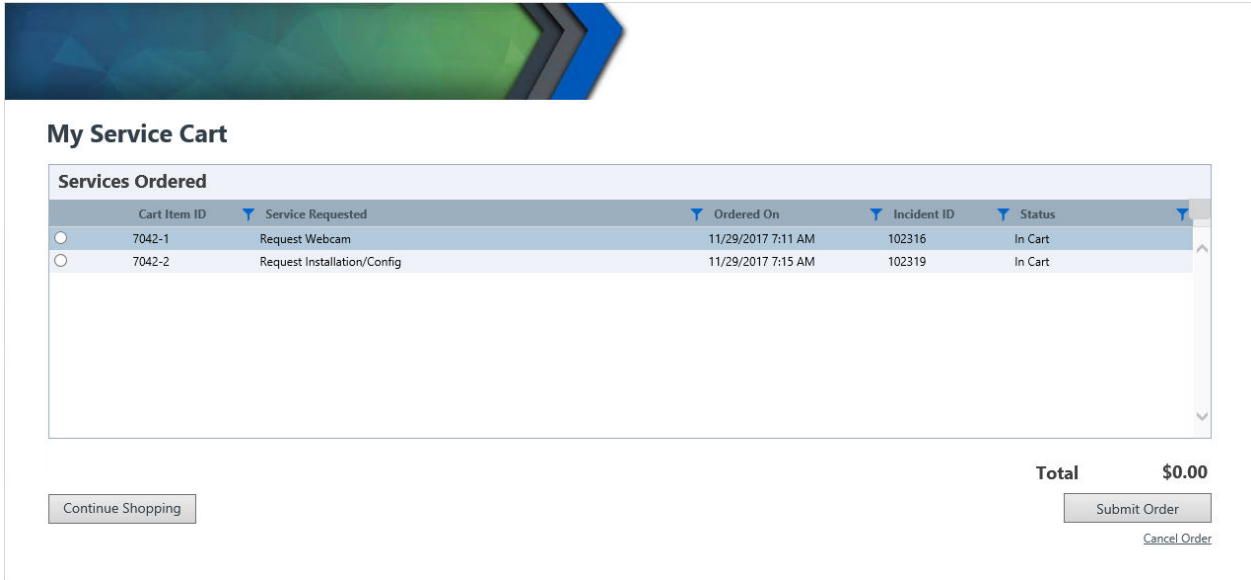
Service Cart management is the process that gives Customers more control over their Service Requests and Service Orders.



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

## About Service Carts

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.



**My Service Cart**

Services Ordered					
Cart Item ID	Service Requested	Ordered On	Incident ID	Status	
7042-1	Request Webcam	11/29/2017 7:11 AM	102316	In Cart	
7042-2	Request Installation/Config	11/29/2017 7:15 AM	102319	In Cart	

**Total** **\$0.00**

[Continue Shopping](#) [Submit Order](#) [Cancel Order](#)

CSM Provides an OOTB Service Cart as a Major Business Object for Customers to use in the [OOTB IT Portal](#).



**Note:** Service Cart 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](#).



## Service Cart Good to Know

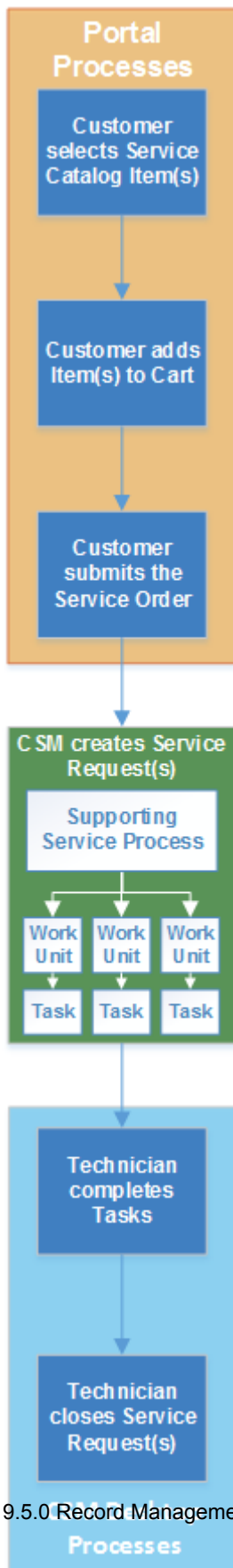
- A Service Cart is an e-commerce tool that allows Customers to add multiple Service Requests to a single order, and then temporarily hold the items until they are ready to submit the order. When the order is submitted, each Service Request automatically creates associated Tasks based on related Service 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 Search Groups](#) 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.





**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.

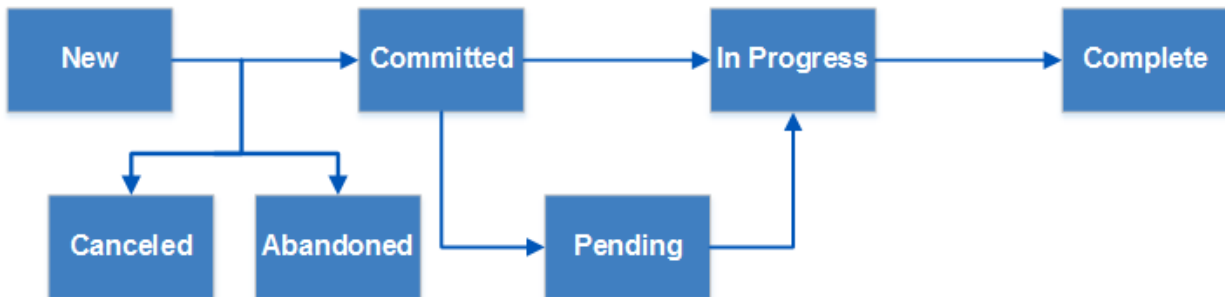
## Contributors

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.

The screenshot displays the 'Service Catalog' interface. At the top, there is a navigation bar with the Cherwell logo and 'SERVICE MANAGEMENT' text. The user is logged in as 'Henri Bryce'. The main content area features a search bar and a grid of six service cards, each with an icon, a title, and a brief description:

- Account Management:** This service pertains to controlling access to network resources or centralized software. T...
- Conferencing / Presentation:** Conference Setup, Web sharing, projectors and more
- Desktop Management:** This service covers the requisition, upkeep and disposal of standard computer systems,...
- E-Mail / Calendaring:** This is a mission-critical system that provides all you need to know about the E-Mail accou...
- Employee Support:** This service is used primarily by HR and hiring
- Enterprise Apps:** This service contains options for mission-

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

The Request form opens.

**Request New Computer**

Please fill out the following information:

Model:

**Add to Cart**

**Computer Details:**

Unit Price	\$0.00
Accessories	\$0.00
<b>Total</b>	<b>\$0.00</b>

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

The My Service Cart Dashboard opens.

**My Service Cart**

Services Ordered

Number	Item	Description	Cost
7041-1	Computer	Request New Computer --(Submitted by John Allard via Portal) Latitude E5530 L...	\$519.00
7041-2	Desktop Telephone	Request Telephone --(Submitted by John Allard via Portal)	\$0.00

**Total: \$519.00**

**Continue Shopping** **Submit Order** [Cancel Order](#)

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
<input checked="" type="radio"/> 7041-1	Request New Computer	7/21/2016 10:40 AM	102272	New
<input type="radio"/> 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.

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
--------------	-------------------	------------	-------------	--------

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](#)
- [Search Groups](#)
- [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. Quick Info Tile: Displays important at-a-glance information (Service Order ID, Status bar, [record ownership](#), etc.).
2. Main Pane: Displays the main Form details and Fields.

The screenshot shows a web form titled "Service Order" with a "Value" status. The Quick Info Tile (1) displays the status and requestor information. The Main Pane (2) contains a "Details" table and a descriptive text box.

Created on:	Estimated Cost:	Items:	% Complete:	Items Pending:	In Progress:	Complete:	Canceled:
1/1/0001	\$0.00	0	0.00 %	0	0	0	0

The Service Cart is a container for an aggregation of Service Requests which are added from the Service Catalog on the Portal. When a customer selects a Service from the Service Catalog, fills out the applicable information and clicks the 'Add to Cart', if the Service Cart has not been created, it will be created, and then the Service Cart Item will receive the Service Cart RecID and be joined to the Cart. The cart is displayed as a Portal dashboard.



**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
<b>Quick Info Tile</b>		
Service Order	Record type and unique record identifier (ID).	CSM automatically assigns the ID when the Service Cart is created.

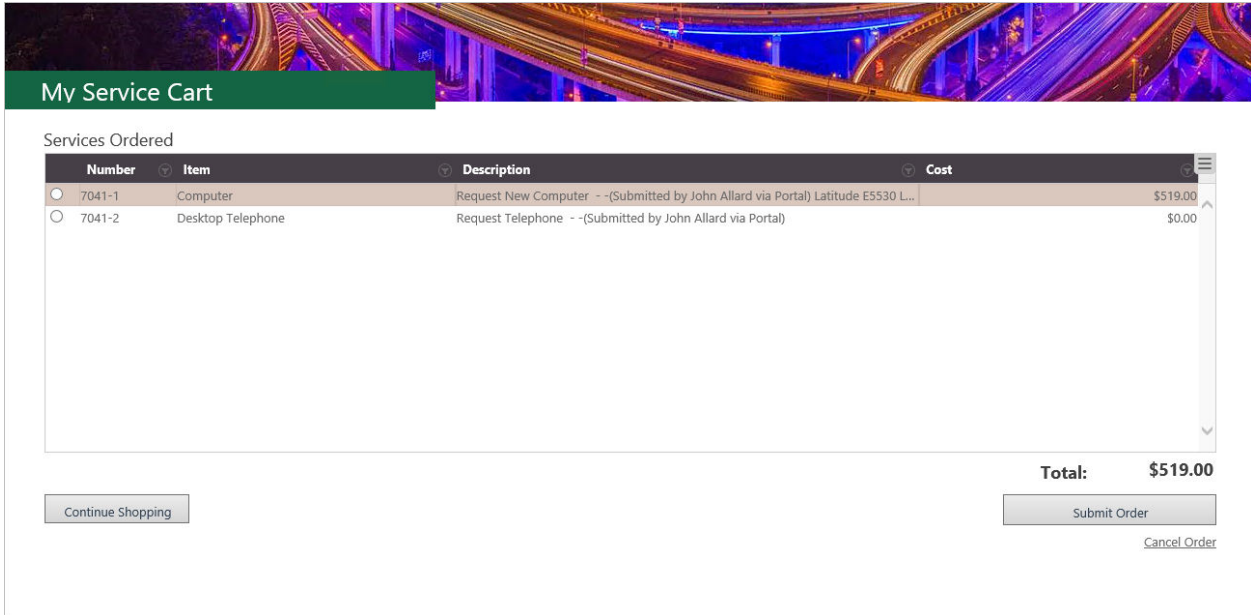
Field	Description	Comments
Status	<p>Statuses include:</p> <ul style="list-style-type: none"> <li>• <b>New:</b> Customer has created and recorded the initial details of a Service Request(s) in the Portal.</li> <li>• <b>Committed:</b> Customer has submitted their Service Order in the Portal.</li> <li>• <b>Pending:</b> The Service Order is temporarily paused or on hold.</li> <li>• <b>In Progress:</b> A technician in the CSM Desktop Client is investigating/ fulfilling the Service Order.</li> <li>• <b>Complete:</b> A technician has resolved and closed the Service Order.</li> <li>• <b>Canceled:</b> The Customer who created and recorded the initial details of the Service Order has canceled the order in the Service Cart before submitting it.</li> <li>• <b>Abandoned:</b> 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.</li> </ul>	
Requester	Name, avatar, e-mail address, and phone number associated with the requester (i.e., the Portal Customer who submitted the Service Order).	
<b>Main Pane - Details</b>		
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.

<b>Field</b>	<b>Description</b>	<b>Comments</b>
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).



The screenshot shows the 'My Service Cart' dashboard. At the top, there is a header with the text 'My Service Cart' on a green background. Below the header, the section is titled 'Services Ordered'. It contains a table with the following data:

Number	Item	Description	Cost
<input checked="" type="radio"/> 7041-1	Computer	Request New Computer --(Submitted by John Allard via Portal) Latitude E5530 L...	\$519.00
<input type="radio"/> 7041-2	Desktop Telephone	Request Telephone --(Submitted by John Allard via Portal)	\$0.00

At the bottom right of the table area, the total is displayed as **Total: \$519.00**. Below the table, there are three buttons: 'Continue Shopping' on the left, 'Submit Order' in the center, and 'Cancel Order' on the right.

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

<b>Item</b>	<b>Description</b>	<b>Widget Type</b>	<b>Widget Name</b>	<b>Widget Uses:</b>
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 Search Group
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 Search Group



# Service Cart One-Step Actions

CSM provides several OOTB Service Cart [One-Step Actions](#), including:

One-Step Action	Description/Actions	Associations	Executed From
<b>Blueprint</b>			
Create Incidents	<p>Create Incidents from Service Cart Items.</p> <p>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.</p>	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
<b>Blueprint - Email Messages</b>			
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.
<b>Blueprint - Status Actions</b>			
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.
<b>Global</b>			
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-Steps 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-Steps associated with a particular type of Business Object.

## Service Cart Search Groups

CSM provides several OOTB Service Cart [Search Groups](#), including:

Search Group	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.

## 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 in CSM.

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.

In CSM, 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 in CSM.

# Create a Site Record

Walk through the typical steps to create a Site record.

## To create a Site record:

1. On the [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 Site Details section:
  - a. **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. **Region Code:** From the drop-down, select a **region code** (example: Western United States).
  - e. **Country:** From the drop-down, select the **country** associated with the Site (example: United States of America).
  - f. **State/Province/Territory:** From the drop-down, select the name of the **state, province, or territory** associated with the Site (example: Colorado).
  - g. **City:** Provide the name of the **city** (example: Colorado Springs).
  - h. **Postal Code Zip:** Provide the **zip code** (example: 80908).
  - i. **Notes:** Provide other **important information** for the Site.
3. Assign a Site Manager in the Quick Info Tile by clicking one of the ownership links:
  - Assign To: Click the **link** to select a User owner . The Team owner is populated by the User owner's default Team.
  - Select Owner: Click the **link** to select a Team owner and then a User owner.

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 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 Building Details section:
  - a. **Site:** From the drop-down, select the **site** associated with the Building (example: USA Headquarters).
  - b. **Region Code:** This field auto-populates using the region code from the associated Site record. If necessary, provide a different **region code**.
  - c. **Building Name:** Provide a **name** for the Building. This is a required field.
  - d. **Country:** This field auto-populates using the country from the associated Site record. If necessary, provide a different **country**.
  - e. **Address:** This field auto-populates using the address from the associated Site record. If necessary, provide a different **address**.
  - f. **Address 2:** Provide **additional address information** for the Building.
  - g. **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**.
  - h. **City:** This field auto-populates using the city from the associated Site record. If necessary, provide a different **city**.
  - i. **County:** Provide the name of the **country**.
  - j. **Postal Code Zip:** This field auto-populates using the zip code from the associated Site record. If necessary, provide a different **zip code**.
  - k. **Full Address:** Provide the **full address** for the Building.
  - l. **Notes:** Provide other **important information** for the Building.
3. Assign a Building Manager in the Quick Info Tile by clicking one of the ownership links:
  - Assign To: Click the **link** to select a User owner . The Team owner is populated by the User owner's default Team.
  - Select Owner: Click the **link** to first select a Team owner and then a User owner.
  - Select Team: Click the **link** to select a Team owner.
  - Take Ownership: Click this **link** to make yourself the User owner.
4. Activate the Site by clicking the **Next: Active** link in the Status bar.
 

The status changes to Active and the Building record is available.
5. (Optional) To deactivate the Building, click the **Next: Inactive** link in the Status bar or click the **Set Status to Inactive** link in the I Want To section.

6. (Optional) To mark the Building as Vacant, click the **Set Status to Vacant** link in the I Want To section.

# Task Management

Task is a Group Business Object and the Group Leader for Work Unit.

A Task is a piece of work that is created and assigned to another CSM User or Team to help resolve or fulfill an Incident, Service Request, Problem, or Change Request (example: An Incident might require a server reboot). The appropriate Group Member populates the Task tab in the Form Arrangement of the parent record. Tasks can be created manually from the Task Tab, or created automatically from a One-Step and through a Service Catalog Template.

# 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.

## Create a New Work Item

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



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

2. Complete the Incident Form.
3. Click the **New Work Item** button from the Task tab in the Form Arrangement. A new Work Item Form opens with a unique ID and status of New.
4. Click the **Select Owner** link in the Owned By tile of the Quick Info pane to assign a User and a Team to the Work Item.
5. Provide a **Title** for the Work Item.
6. Provide a **Description** of the Work Item Task.
7. (Optional): Click 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): Click the **Track time spent** checkbox to require the owner to log time spent resolving the Work Item.
9. Click **Save**.

An e-mail 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.

## Using Work Item Actions

There are several I Want To actions associated with the Work Item Form to assist with managing Tasks and assist with completion:

- **Take Ownership:** Click this link to assign the Task to yourself.
- **View Detailed Date/Time Information:** Click 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:** Click this link to add the Task due date to your Outlook calendar.
- **Add to a Downstream Task:** Click this link to open a new Task Form. Doing so adds an additional dependency to the parent record. The Downstream Task must be completed after the Work Item it was created from.
- **Link to an Upstream Task:** Click 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:** Click 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:** Click this link to decline the task. The status automatically moves to Closed, and the Close Code is automatically set to Declined.
- **Reassign this Task:** Click this link to reassign the task to another team or another User.

## Complete a Work Item

After finishing a Task, complete the following steps to move the Work Item to Closed:

1. Select a **Close Code** from the Close Code drop-down (example: Completed).
2. Provide **Completion Details**.
3. Click **Next: Close** in the Status tile of the Quick Info pane to move the Work Item to Closed.

### Related concepts

[Logging Incidents](#)

[Logging Problems](#)

[Change Workflow](#)

# Task Reports

CSM provides an OOTB Task Metrics Report that displays metrics on Assignees, Escalation, Work Items, Time Entry, and Activity. To run the Task Metrics report from CSM Desktop Client, select **Tools > Reports > Task Association > Task Metrics > Run**.

# Cherwell Service Management License Usage Management



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

## About CSM License Usage

Cherwell Service Management (CSM) License Usage is a tool that allows you to track Cherwell Service Management® license data related to the number of total licenses, used licenses, and remaining licenses. It also allows you to track usage counts for features that do not require a license, such as the Dashboard Viewer.

In CSM, CSM License Usage is a Major Business Object. The CSM License Usage form allows Users to view, manage, and track usage data.



## CSM License Usage Good to Know

- Search for one or more CSM License Usage records that meet a specific criteria by running a Quick Search or [Search Group](#).
- Create a new CSM License Usage record by clicking New>New CSM License Usage on the CSM Desktop Client toolbar or by clicking File>New>New CSM License Usage from the CSM Desktop Client menu bar.
- CSM provides several OOTB [Automation Processes](#) to automate the CSM License Usage process. For more information, refer to the Automation Process documentation.
- Press **TAB** to move to the next field on the form.
- The Started By section is populated with the name of the creator.
- A time stamp is recorded when the record is created.
- View high-level license counts in the License Usage Summary tab of the CSM License Usage Form Arrangement.
- View detailed license counts in the CSM License Usage Count tab of the CSM License Usage Form Arrangement.
- Quickly access the License Usage Metrics Dashboard by clicking the Go to CSM License Usage Dashboard link in the I Want To section.
- Obtain a real-time license count by clicking the Go to License Count link in the I Want To section.

## Using CSM License Usage

When working with the CSM License Usage, Users can:

- [Create a CSM License Usage record.](#)



# Create a CSM License Usage Record

Use the CSM Desktop Client to access the CSM License Usage record to track Cherwell Service Management® license data related to the number of total licenses, used licenses, and remaining licenses.

## To create a CSM License Usage record:

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

A new CSM License Usage record is created with a status of Not Tracking. The creator is automatically assigned as the Started By User.

2. Record Usage Tracking Configuration information (Start Date, End Date, Frequency, and Duration are required):
  - a. Start Date: Click the **Calendar Date Selector** button  to select a start date and time for the license tracking.
  - b. End Date: Click the **Calendar Date Selector** button  to select an end date and time for the license tracking.
  - c. Frequency: Click the **Up** and **Down** buttons to select the frequency of the license tracking.
  - d. Duration: Click the **drop-down**, and then select a **duration** for the license tracking (hours or minutes).
  - e. License Count: Select the **type of data** that you want to track (Available Licenses, Used Licenses, and Total Licenses are selected by default).
  - f. Licensed Client: Select one or more **clients** for which you want to track license usage (Desktop, Browser, Portal, and Reserved are selected by default).
  - g. Non-Licensed Client: Select one or more **features** for which you want to track usage counts (Portal Login is selected by default).
3. Click the **Activate Automated Tracking** button.

The CSM License Tracking status to Tracking. When the first instance of license tracking is recorded, and the number of Available Licenses, Used Licenses, and Remaining Licenses display in the Quick Info Tile alert bars. When 50% of the licenses are in use, the Used Licenses alert bar turns orange. When 80% of the licenses are in use, the Used Licenses alert bar turns red.

A summary of the tracked information is displayed in the License Usage Summary tab in the Form Arrangement.

**Tip:** For a real-time license count, click the **Get License Count** link in the I Want To section of the Quick Info Tile. A record of the current license data displays in the Quick Info Tile alert bars and in the CSM License Usage tab of the Form Arrangement.

4. Click the **Deactivate Automated Tracking** button to end tracking.

# Configuring CSM License Usage

Complete the following procedures to configure CSM License Usage. Configuration procedures are completed in CSM Administrator.

## To configure CSM License Usage:

1. [Configure CSM License Usage security rights](#): Configure who can access CSM License Usage Business Objects, including:
  - CSM License Usage
  - CSM License Usage Count
  - CSM License Usage Duration
  - CSM License Usage Status
  - CSM License Usage Type

# CSM License Usage Features

CSM provides the following tools to help manage CSM License Usage records:

- [Form](#)
- [Dashboard](#)
- [Search Groups](#)
- [Automation Processes](#)

# CSM License Usage Form

Use the CSM License Usage Form to log, edit, and track CSM License Usage records. The form is made up of four main areas:

1. Quick Info Tile: Displays important at-a-glance information, including Status bar (current and next status), Available Licenses bar, Used Licenses bar, Remaining Licenses bar, record ownership, and common operations (I Want To section).
2. Main Pane: Displays the main form fields, which allow you to define the data you want to track.
3. Arrangement: Dynamically displays linked records (Child Records) that are in a relationship with the parent CSM License Usage record.

The following table describes the fields on the form.

Field	Description	Comments
Quick Info Tile	Important at-a-glance information, including Status bar (current and next status), Available Licenses bar, Used Licenses bar, Remaining Licenses bar, record ownership, and common operations (I Want To section).	

Field	Description	Comments
CSM License Usage	Record type.	
<b>Status Alert Bar</b>	Current and next status of the CSM License Usage record.	
<b>Available Licenses Alert Bar</b>	Displays the total number of CSM licenses available to your organization.	
<b>Used Licenses Alert Bar</b>	Displays the number of CSM licenses currently being used.	
<b>Remaining Licenses Alert Bar</b>	Displays the number of CSM licenses that are currently available.	
<b>Owned By</b>		
User Owner -select owner-	Record owner.	
Time stamp	The date and time in which the record was created.	
<b>I Want To</b>		
Get License Count	Click the <b>link</b> to access real-time license data based on the defined criteria.	License Usage Count One-Step Action: Steps through a count of each CSM License type (ex: Available licenses) and then saves the record.
Go to CSM License Usage Dashboard	Click the <b>link</b> to open the License Usage Metrics Dashboard where you can view and track license data.	Go to Dashboard One-Step Action: Opens the License Usage Metrics Dashboard in the Main Pane.

# CSM License Usage Dashboards

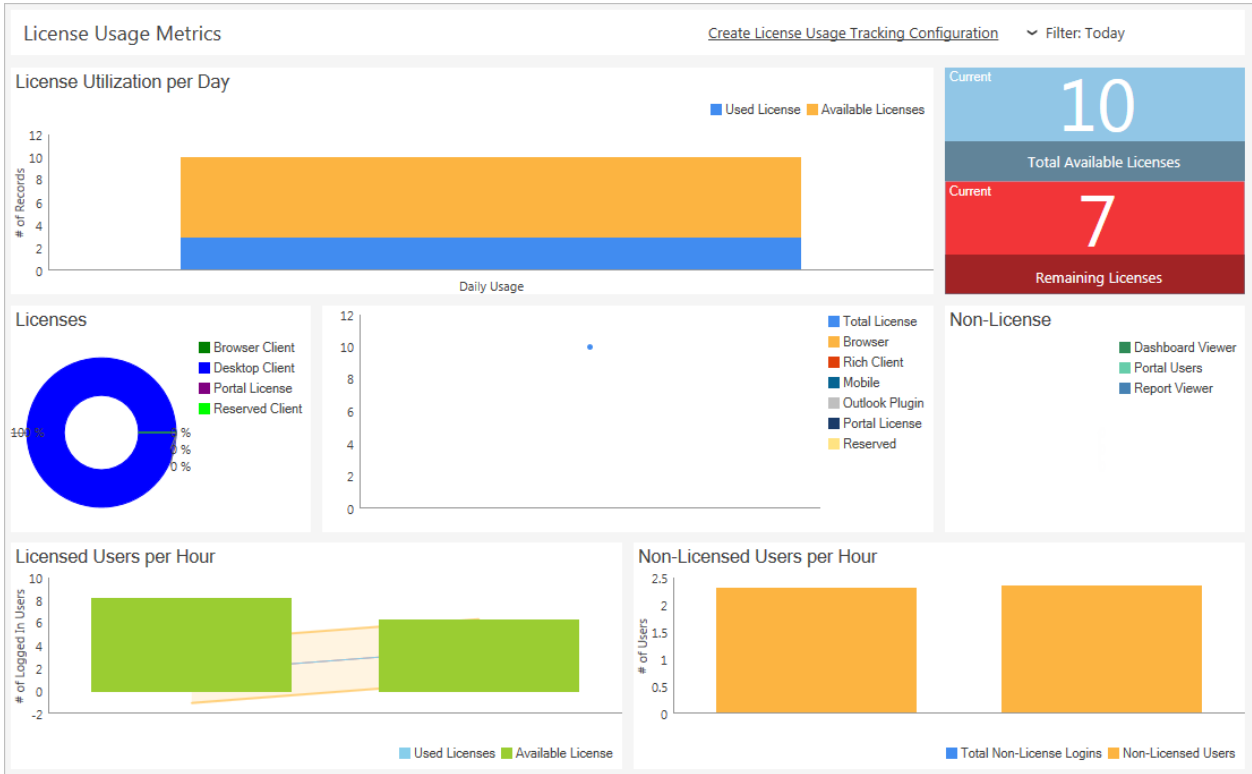
CSM provides the following OOTB CSM License Usage Dashboards:

- [CSM License Usage Dashboard](#)
- [License Usage Metrics Dashboard](#)



# CSM License Usage Dashboard

CSM provides a OOTB License Usage Metrics Dashboard that intuitively organizes your critical license metrics into a single control panel.



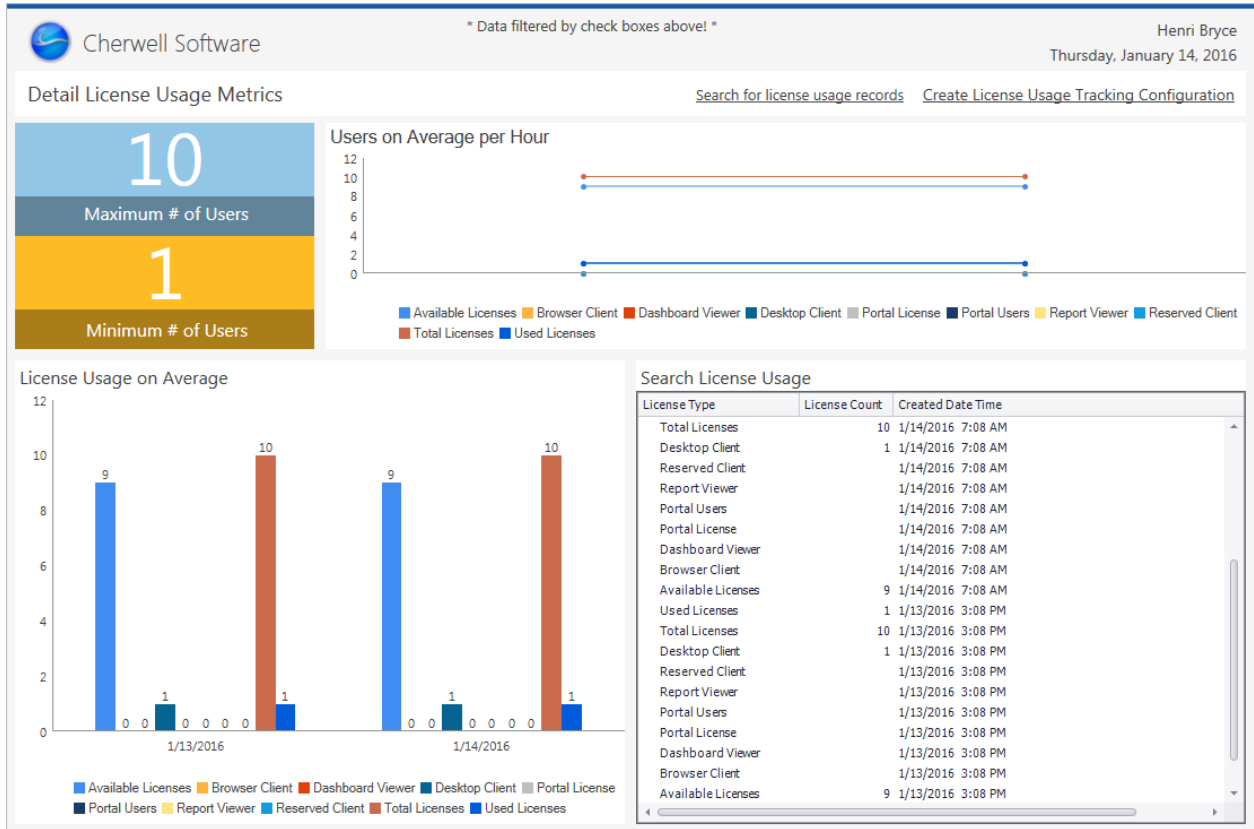
## OOTB License Usage Metrics Dashboard Widgets

Item	Description	Widget Type	Widget Name	Widget Uses:
License Utilization per Day	Number of used CSM licenses and available licenses per day.	Chart	Second Layout Chart	Used Licenses Search Group, Available Licenses Search Group
Total Available Licenses	Total number of CSM licenses available to the organization.	Text Gauge	Total Available Licenses	Total Licenses Search Group
Remaining Licenses	Number of CSM licenses currently available to the organization.	Text Gauge	Available Licenses	Available Licenses Search Group
Licenses	Percentage of each CSM license type being used.	Chart	License Used	License Used Search Group

Item	Description	Widget Type	Widget Name	Widget Uses:
Daily Application Usage	Number of each type of CSM license being used per day.	Chart	Daily Application Usage	Multiple Search Groups (Total License, Browser Client, Rich Client, Mobile Client, Outlook Plugin, Portal License, Reserved License)
Non-License	Number of each type of non-licensed CSM features being used	Doughnut	Non License Logins	Non License Logins Search Group
Licensed Users per Hour	Number of used and available CSM licenses per hour.	Chart	Users Logged per Hour	Used Licenses Search Group, Available License Search Group
Non-Licensed Users per Hour	Number of users logged into non-licensed CSM features per hour.	Chart	Non License Users by Hour	Total Non-License Login Search Group, Non-Licensed Users Search Group

# Detail License Usage Metrics Dashboard

CSM provides a OOTB Detail License Usage Metrics Dashboard that dynamically displays data for a specific licensed client or non-licensed feature (ex: Desktop Client). Access the Dashboard by double-clicking a Widget segment for a particular



## OOTB Detail License Usage Metrics Dashboard Widgets

Item	Description	Widget Type	Widget Name	Widget Uses:
License Utilization per Day	Number of used CSM licenses and available licenses per day.	Chart	Second Layout Chart	Used Licenses Search Group, Available Licenses Search Group
Maximum # of Users	Highest number of licenses used within an hour at any point during the last quarter.	Text Gauge	Total Users	Created Date Time field, License Count field
Minimum # of Users	Lowest number of licenses used within an hour at any point during the last quarter.	Text Gauge	Minimum Users	Created Date Time field, License Count field

<b>Item</b>	<b>Description</b>	<b>Widget Type</b>	<b>Widget Name</b>	<b>Widget Uses:</b>
Users on Average per Hour	Average number of licenses used each hour.	Chart	Users by the Hour	Created Date Time field, License Count field
License Usage on Average	Average number of licenses used each day.	Chart	Usage Detail	Created Date Time field, License Count field
Search License Usage	All license usage counts organized by the Created Date Time field.	Search Results List	Search License Usage	CSM License Usage Count Business Object

## CSM License Usage Search Groups

CSM provides numerous OOTB CSM License Usage Search Groups. Notable Search Groups include:

Search Group	Returns	Association	Executed From
All CSM License Usage Records	All CSM License Usage records.	CSM License Usage	Search Manager
Completed CSM License Usage	CSM License Usage records with a status of Complete.	CSM License Usage	Search Manager
Hour Tracking Duration	CSM License Usage record with a duration in hours and a status of Tracking.	CSM License Usage	Search Manager, Metrics, One-Step Actions
Minute Tracking	CSM License Usage records with a duration in minutes.	CSM License Usage	Search Manager
Not Tracking License Usage	CSM License Usage records with a status of Not Tracking.	CSM License Usage	Search Manager
Non License Logins	CSM License Usage counts for features that do not require a license.	CSM License Usage Count	Search Manager, Widgets
Rich Client	CSM License Usage count for the CSM Desktop Client.	CSM License Usage Count	Search Manager, Widgets
Portal Login	CSM License Usage count for the Portal.	CSM License Usage Count	Search Manager
Browser Client	CSM License Usage count for the Browser Client.	CSM License Usage Count	Search Manager, Widgets

# CSM License Usage Automation Processes

CSM provides the following OOTB CSM License Usage Automation Processes:

Name	Description
License Usage Tracking in Hours	When the status of a CSM License Usage record is Tracking, the process waits until the defined frequency in hours is reached, and then initiates the License Usage Count One-Step Action.
License Usage Tracking in Minutes	When the status of a CSM License Usage record is Tracking, the process waits until the defined frequency in minutes is reached, and then initiates the License Usage Count One-Step Action.