IT Service Management Using MXES

maximo®

IT Service Management Using MXES

Rel. 6.0 *06/2005*

Part Number MED0141

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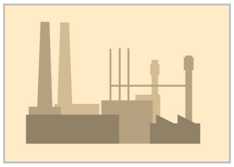

MXES Curriculum for EAM

For Training Info, Course Descriptions, and Availability, go to:

Web: http://www.mro.com/corporate/mroservices/training/
E-mail: TrainSVC@mro.com
Fax: 781.280.2201

Key

Instructor-Led Training

Virtual Classroom Training

Foundation

Course #	Course Name	Length	Delivery Options	Prerequisites
MED0138	MXES Navigation & Querying	½ day, or 3-hr virtual		None

Upgrade

Course #	Course Name	Length	Delivery Options	Prerequisites
MED0136	MXES for EAM - New Features	3 days		None (Note: for users upgrading from Maximo 5)

Implementation

Course #	Course Name	Length	Delivery Options	Prerequisites
MED0146	MXES Immersion Training for EAM	5 days		MXES Navigation & Querying
MED0155	Maintenance Best Practices Using MXES	2 days		None

End-User / Functional

Course #	Course Name	Length	Delivery Options	Prerequisites
MED0137	System Administration for MXES	3 days		MXES Navigation & Querying
MED0139	Inventory Management Using MXES	3 days		MXES Navigation & Querying
MED0143	Work Management Using MXES	3 days		MXES Navigation & Querying
MED0147	Using SQL with MXES	1 day		MXES Navigation & Querying
MED0148	Workflow Management Using MXES	5 days		MXES Immersion Training for EAM (Note: Extensive hands-on Maximo experience preferred)
MED0150	Purchasing with MXES	3 days		MXES Navigation & Querying
MED0151	Developing MXES Reports with Actuate	TBD		MXES Navigation & Querying, Using SQL with MXES
MED0152	Contract Management Using MXES	TBD		MXES Navigation & Querying
MED0153	Using the MXES Application Designer	TBD		MXES Navigation & Querying, System Administration for MXES
MED0154	The MXES KPI Manager (VCT)	3-hr virtual		Using SQL with MXES

Flip for Curriculum Path by Role

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Suggested Curriculum Path by Job Role

MXES for EAM

Course Name	Manager Track	Implementation Track		Developer Track			Administrator Track			End-User Track				
	Managers, Supervisors, & Directors	Maximo Implementation Team Members	Maximo Upgrade Team (from MX 5)	Maximo Developer / Maximo App Support	Report Writer	Workflow Developer	Maximo Admin	Database Admin	Report Admin	Maintenance Personnel	Inventory Personnel	Contracts Manager	Accounts Payable / Receiving Personnel	Procurement Personnel
MED0138 MXES Nav & Query (1/2 day)		✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
MED0136 MXES for EAM - New Features (3 days)			✓											
MED0137 System Admin for MXES (3 days)		✓		✓		✓	✓	✓						
MED0139 Inventory Mgmt Using MXES (3 days)											✓			
MED0143 Work Mgmt Using MXES (3 days)										✓				
MED0146 MXES Immersion Training for EAM (5 days)		✓	✓	✓		✓	✓	✓						
MED0147 Using SQL with MXES (1 day)					✓			✓	✓					
MED0148 Workflow Mgmt Using MXES (5 days)						✓								
MED0150 Purchasing with MXES (3 days)													✓	✓
MED0151 Dev. MXES Reports w/ Actuate					✓				✓					
MED0152 Contract Mgmt Using MXES												✓		
MED0153 Using MXES App Designer		✓	✓	✓										
MED0154 The MXES KPI Manager (3 hours)					✓				✓					
MED0155 Maintenance Best Practices Using MXES (2 days)	✓	✓	✓											

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MXES Curriculum for ITSM / ITAM

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E-mail: TrainSVC@mro.com
Fax: 781.280.2201

Foundation

Course #	Course Name	Length	Delivery Options	Prerequisites
MED0138	MXES Navigation & Querying	½ day, or 3-hr virtual		None
MED0140	Introduction to ITIL (VCT)	3-hr virtual		None

Implementation

Course #	Course Name	Length	Delivery Options	Prerequisites
MED0149	MXES Immersion Training for IT	5 days		MXES Navigation & Querying
MED0145	Implementing ITIL with MXES	2 days		Introduction to ITIL (VCT)

End-User / Functional

Course #	Course Name	Length	Delivery Options	Prerequisites
MED0141	IT Service Management Using MXES	3 days		MXES Navigation & Querying
MED0142	IT Asset Configuration & Management in MXES	2 days		MXES Navigation & Querying
MED0137	System Administration for MXES	3 days		MXES Navigation & Querying
MED0147	Using SQL with MXES	1 day		MXES Navigation & Querying
MED0148	Workflow Management Using MXES	5 days		MXES Immersion Training for IT (Note: Extensive hands-on Maximo experience preferred)
MED0150	Purchasing with MXES	3 days		MXES Navigation & Querying
MED0151	Developing MXES Reports with Actuate	TBD		MXES Navigation & Querying, Using SQL with MXES
MED0152	Contract Management Using MXES	TBD		MXES Navigation & Querying
MED0153	Using the MXES Application Designer	TBD		MXES Navigation & Querying, System Administration for MXES
MED0154	The MXES KPI Manager (VCT)	3-hr virtual		Using SQL with MXES

Flip for Curriculum Path by Role

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Suggested Curriculum Path by Job Role

MXES for ITSM / ITAM

Course Name	Manager Track		Implementation Track		Developer Track			Administrator Track			End-User Track			
	Managers, Supervisors, & Directors	Service Level Managers	Maximo Implementation Team	Workflow Implementation Team	Maximo Developer / Maximo App Support	Report Writer	Workflow Developer	Maximo Admin	Database Admin	Report Admin	Service Desk / Support Personnel & Supervisors	IT Asset Managers / Configuration Managers	Contracts Manager	Procurement Personnel
MED0138 MXES Nav & Query (1/2 day)		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
MED0137 System Admin for MXES (3 days)				✓	✓			✓	✓			✓		
MED0140 Intro to ITIL (VCT) (3 hours)	✓													
MED0141 IT Service Mgmt Using MXES (3 days)		✓									✓			
MED0142 IT Asset Config & Mgmt in MXES (3 days)												✓		
MED0145 Implement ITIL w/ MXES (2 days)	✓	✓	✓											
MED0147 Using SQL with MXES (1 day)						✓			✓	✓				
MED0148 Workflow Mgmt Using MXES (5 days)				✓			✓							
MED0149 MXES Immersion Training for IT (5 days)			✓	✓	✓			✓						
MED0150 Purchasing with MXES (3 days)														✓
MED0151 Dev. MXES Reports w/ Actuate						✓				✓				
MED0152 Contract Mgmt Using MXES													✓	
MED0153 Using MXES App Designer			✓		✓									
MED0154 The MXES KPI Manager (3 hours)						✓				✓				

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Chapter 5: Incident Management—Basic Concepts

Chapter 6: Incident Management—Additional Concepts

Chapter 7: Problem, Change, and Release Management

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Chapter 8: Service Support Management

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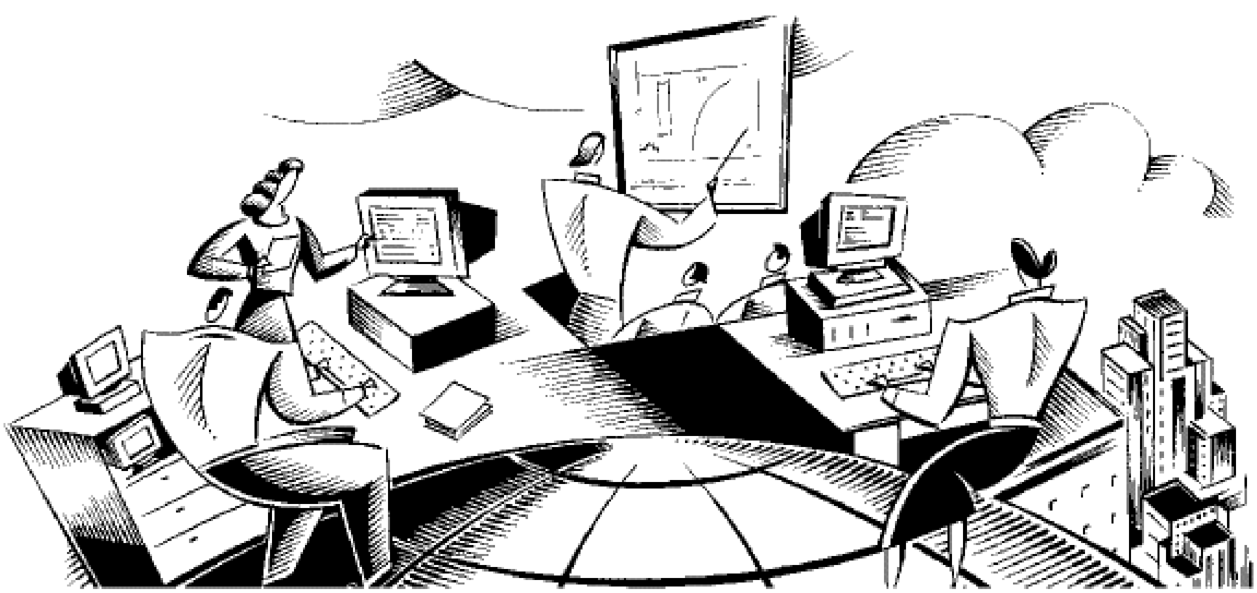
Chapter 1: Course Overview



In This Chapter This chapter contains the following topics:

Course Introduction

Welcome

Welcome to the *IT Service Management Using MXES* course. When you have completed this class, you should be acquainted with key IT Service Management functionality provided in the Maximo Enterprise Suite (MXES).

Audience

This course is intended for anyone involved in any IT Service Management roles.

Chapter Purpose

The purpose of this chapter is to:

- establish the goals and objectives for this course, and
- acquaint you with the features of both the course and the participant guide.

Key Information

While working through exercises in this course, to access Maximo, you will need the following information:

Maximo URL: ______________________________.

Maximo User Name: ______________________________.

Maximo Password: ______________________________.

Assigned Student Number: ______________________________.

Database Instance (if applicable): ______________________________.

Service Desk E-mail Address: ______________________________.
(*E-mail Listener Configuration*)

Your instructor will provide this information.
Please write the information in these spaces.

Course Goals and Objectives

Course Overview

This course will briefly cover some basic IT Service Management (ITSM) concepts and how Maximo supports the ITSM processes. We will also discuss how Maximo supports these processes within the IT Infrastructure Library (ITIL) framework.

Then you will set up some simple data to learn how Maximo supports some of the ITSM processes.

Later in this course, you will go into detail with each of the various Maximo applications and how they support the ITSM processes.

Finally, the latter part of this course will look at some of the management concepts associated with ITSM.

Course Prerequisites

The prerequisites for this course are as follows:

- *MXES Navigation & Querying* or demonstrable working experience with MAXIMO 5.x or greater
- Working knowledge of the Microsoft Windows operating system

Recommended:

Introduction to ITIL (VCT)

Course Goal

The goal of this course is to enable you to understand and use Maximo to support your service desk within the IT Infrastructure Library (ITIL) framework.

continued on next page

Course Goals and Objectives continued

Course Objectives

When you have completed this course, you should be able to:

- Define IT Service Management (ITSM)
- Define ITSM terms
- Explain ITSM fundamental concepts
- Explain ITSM within ITIL
- Differentiate among the different ticket types in Maximo
- Navigate between ticket types in Maximo
- Explain the use of ticket templates in Maximo
- Create a ticket template in Maximo
- Explain the use of communication templates in Maximo
- Create a communication template in Maximo
- Explain the use of service level agreements (SLAs) in Maximo
- Describe the use of Workflow for ticket management in Maximo
- Create a solution
- Search the Maximo Solutions Knowledge Base
- Create a service request
- View service requests
- Use Workflow to process a service request
- Create and manage an incident
- Create and manage a problem ticket
- Create and manage a change
- Create and manage a release
- Create an SLA

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Course Goals and Objectives continued

Your Learning Objectives

Now that you understand the basic objectives for the course, it is most important that you define the learning objectives *you* bring to the course. We want to make sure that these are clearly stated, mutually understood, and achieved.

List your objectives in the space below. We will conclude the course by asking you whether you have met your objectives. If you have not, we will then address your questions and unmet objectives.

•

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Course Organization

Organization

This course has been organized into teaching modules made up of chapters. Each chapter focuses on a specific aspect of configuring and administering Maximo to help you maintain your installation of Maximo.

Chapters

Each chapter in this course book is an individual teaching module designed to provide an overview of its topic(s) and then provide in-depth instruction and practice.

Each module contains these components:

- a subject matter overview and objectives

  This component provides orientation and perspective for the chapter, along with learning objectives.

- instruction in concepts and procedures

  In this part of the chapter, instructor and text review relevant concepts, components, and procedures.

- hands-on practice

  You will practice most of the important procedures and concepts that the instructor introduces. You will have opportunities for brief hands-on practice during the body of the module and, in some cases, longer hands-on practice in a workshop at the end of the chapter.

Notes Pages

Notes pages are provided at the end of each chapter. You can use these pages to capture information specific to your situation, or important points covered in class discussions.

continued on next page

Course Organization continued

<u>Special Note:</u>
Shared vs. Independent Databases

- Throughout this course there could be up to 20 participants accessing the same database. If you are *sharing* a single database, your instructor will assign you a two-digit student number (for example, 01–20) to avoid confusion and/or conflicting records in the database.

  Some exercises throughout this course will have an *xx* appended to data entry items. Whenever an *xx* is appended, substitute your assigned student number for the *xx*.

- If you are taking this course in an *independent*-database environment—that is, your database is independent from other students' databases and the instructor's database—student numbers are unnecessary. You can simply do the exercises using the records indicated, without adding a student number.

If you are not sure whether you are sharing a database, check with your instructor.

Course Organization continued

Chapter Topics

The following table contains a list of chapters in this student guide:

Chapter	Name
1	Course Overview
2	IT Service Management Processes with Maximo
3	Supporting Data—Overview
4	The Service Desk
5	Incident Management—Basic Concepts
6	Incident Management—Additional Concepts
7	Problem, Change, and Release Management
8	Service Support Management

Typographical Conventions

Introduction

We use a number of typographical conventions and icons in our course books.

Conventions Used in Course Materials

Here are some of the conventions you will see most frequently in the course materials:

Convention	Usage	Example
Italics	Introduces or emphasizes a term	A *system* is a single instance of a Maximo database.
Boldface	Indicates that the word or phrase names a menu item, field, button, or keyboard key	From the **Go To** drop-down menu, select **Administration**.
Arial font	Indicates that this is text you type into a field	Type ASSET_NDX8 in this field.
`Courier` font	Indicates programming code, a system message, or part of a screen display	Maximo displays the following message: `Work order 1000 status changed to APPR.`

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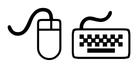
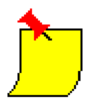
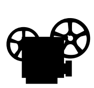
Typographical Conventions continued

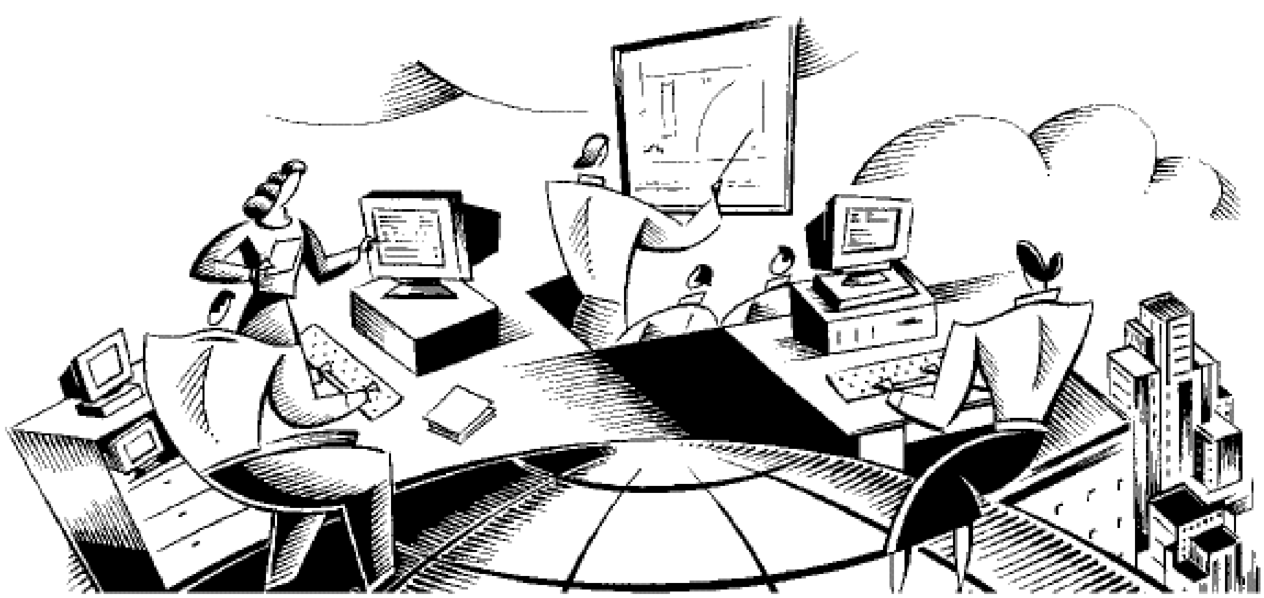
Icons

You will see several icons throughout this student guide. This table explains what they mean.

This icon…	Indicates…
	A procedure that you will practice on your own or with guidance from an instructor
	A paper-and-pencil exercise
	A special note or reminder
	A warning or cautionary note
	A question-and-answer session with the instructor, or a group discussion
	Your role in the next exercise is changing, e.g., from manager to user
	The data you are being asked to enter will be used in another exercise
	A challenge question or exercise
	An industry best practice, tip, or suggestion
	A recording that provides additional course content is available

NOTES:

Chapter 2: IT Service Management Processes with MXES



In This Chapter

This chapter contains the following topics:

Chapter Overview

Introduction

IT Service Management (ITSM) processes vary from business to business. The Enterprise IT functionality of the Maximo Enterprise Suite (MXES) is both flexible and robust enough to be configured to support your organization's particular ITSM processes.

MRO Software used the Information Technology Infrastructure Library (ITIL®) as the framework in the development of MXE/IT.

ITIL is a collection of volumes that outline a framework of best practices for ITSM processes. You can use Maximo to take full advantage of ITIL best practices.

Chapter Focus

This chapter:

- introduces the fundamental IT Service Management concepts and terminology,
- reviews the ten ITSM processes and the Service Desk function in the ITIL framework, and
- identifies the Maximo applications/functions that support ITSM processes.

Learning Objectives

When you have completed this chapter, you should be able to:

- Define IT Service Management (ITSM)
- Discuss the origin and purposes of the Information Technology Infrastructure Library (ITIL)
- Define key ITSM terminology
- Explain ITSM fundamental concepts
- Explain each of the ten ITSM processes, as well as the Service Desk function
- Explain how Maximo supports each ITSM process

IT Service Management (ITSM) Overview

Introduction

IT Service Management (ITSM) is a systematic approach to the planning, development, implementation, delivery, and support of IT Services.

ITSM is a top-down, business-driven approach to the management of IT that addresses:

- the strategic business value generated by the IT organization, and
- delivery of the highest-quality IT service as defined by business needs.

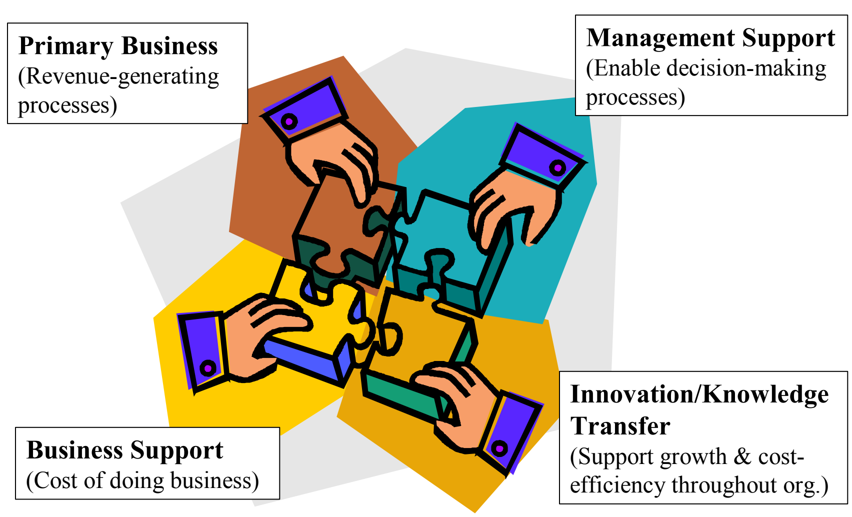
IT Service Management is designed to focus on the people, processes, and technology issues that IT organizations face, including:

- Focusing on customer's perception and experience of the service
- Managing both customer and vendor relationships
- Managing IT processes

Aligning the Business and Information Technology

The following diagram illustrates how ITSM enables business processes and objectives by aligning business needs and objectives with IT services and deliverables.

ITSM Puts the Pieces Together



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IT Service Management (ITSM) Overview continued

Essential Characteristics of ITSM

The following characteristics are essential for quality, goal-focused IT Service Management:

A. Customer focus

- IT goals aligned with business goals
- With IT as an enabler of business processes

B. Process orientation

- With predictable outcomes
- With measurable operational excellence

C. Proactive Service Management

- IT organization guarantees and maintains mutually agreed service levels
- Strong *service delivery* & *service support*

D. Optimized cost/performance

- IT spending in line with business drivers, such as:
  - Optimizing business processes and procedures (controlling costs through increased efficiency)
  - Improving quality of product/service offering
  - Value-additions to business processes (e-commerce applications, bar coded asset tracking, POS systems)
  - Enabling growth and change (leveraging technology to expand into new markets or deepen existing markets)
  - Matching IT costs and business value
  - Justifying IT expenses

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IT Service Management (ITSM) Overview continued

Definition of an IT Service

An IT Service is whatever the customer (end-user) perceives it to be.

Most users perceive the service from end-to-end. Remember not to mistake an IT system for the whole IT Service.

An IT Service is often made up of many systems, processes, and people.

For example, say you provide e-mail as a service:

E-mail Service =

Systems > e-mail server > network service > WAN > LAN > Internet access

+

People > technicians > service representatives > IT managers

+

Processes > functional requirements > maintenance > upgrades > how-to guidance > customer service

The customer only sees the E-mail service.

Note: If a network connection or DNS server is down, but the e-mail server is still running. To the customer, the service is *down*. Similarly, if they are on hold for so long with Service Desk that they abandon the call, to them the IT organization has *no* customer service.

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IT Service Management (ITSM) Overview continued

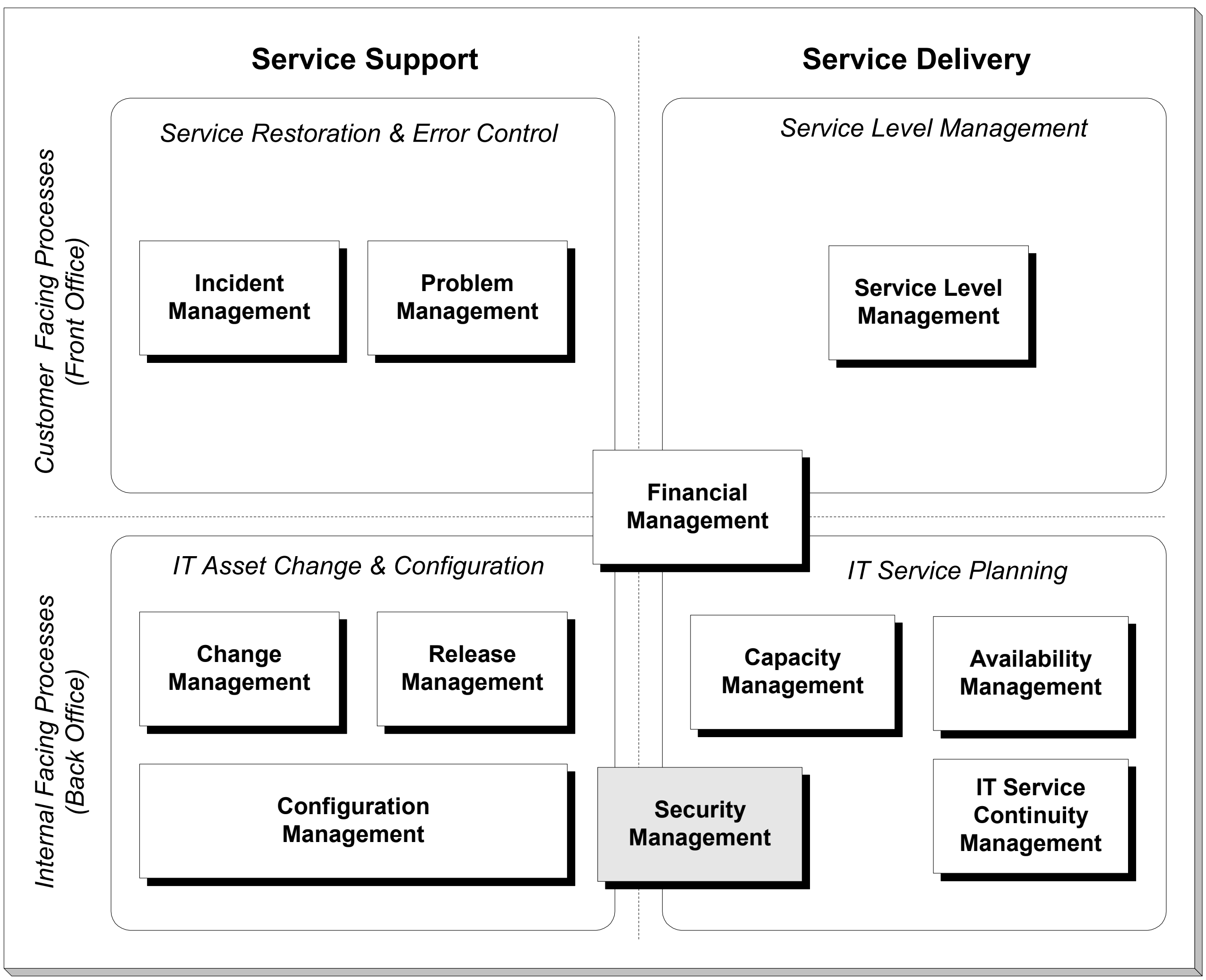
An ITSM Model

IT Service Management can be divided into two core areas:

- Service Support
- Service Delivery

The following diagram details the ITSM processes that fall within each of these two areas. Service Support and Service Delivery are further broken down into customer-facing (front office) and internal-facing (back office) processes.

Figure 1 - IT Service Support & Delivery Model



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IT Service Management (ITSM) Overview continued

IT Service Support and Delivery

Service Support processes are responsible for the day-to-day operation and support of IT Services.

Service Delivery processes are responsible for the long-term planning and improvement of IT service provision.

Notes:

Service Support and Delivery will be covered in detail later in this chapter.

Additionally, there is an ITIL publication regarding Security Management. Security processes are implemented as far as possible into the other processes.

How MXES for IT Supports ITIL Processes

The Maximo Enterprise Suite for IT *directly* supports 7 of the 10 processes listed in the table below. (Those identified with a shaded background are supported, but not necessarily Maximo dependent.)

Specifics of how modules/applications within Maximo support each Service Support and Delivery process will be discussed in detail later in this chapter.

ITSM Processes Supported by MXES	
Service Support	***Service Delivery***
Service Desk*	
Incident Management	Availability Management
Problem Management	Service Level Management
Configuration Management	Financial Management for IT Services
Change Management	Capacity Management
Release Management	IT Service Continuity Management

* *Remember that Service Desk is a function and not a process. The Service Desk functional unit owns the* Incident Management *process.*

Notes:

Maximo Enterprise IT is Pink Elephant's *PinkVerify™ Enhanced* certified to support the above seven processes.

MXES provides some level of support for the remaining three processes. Maximo can be customized/configured through its Application Designer, DB Configuration, and Maximo Enterprise Adapter (MEA) functionality.

However, such discussion is beyond the scope of this course. Please contact your MRO Software Business Solutions Manager for more information.

ITIL Overview

What Is ITIL?

ITIL is the IT Infrastructure Library. ITIL® is a Registered Trade Mark and a Community Trade Mark of the United Kingdom's Office of Government Commerce (OGC.)

ITIL is a customizable framework of best practices for Information Technology Service Management (ITSM) processes to allow organizations to achieve quality IT service and overcome difficulties associated with the growth and ongoing management of IT systems.

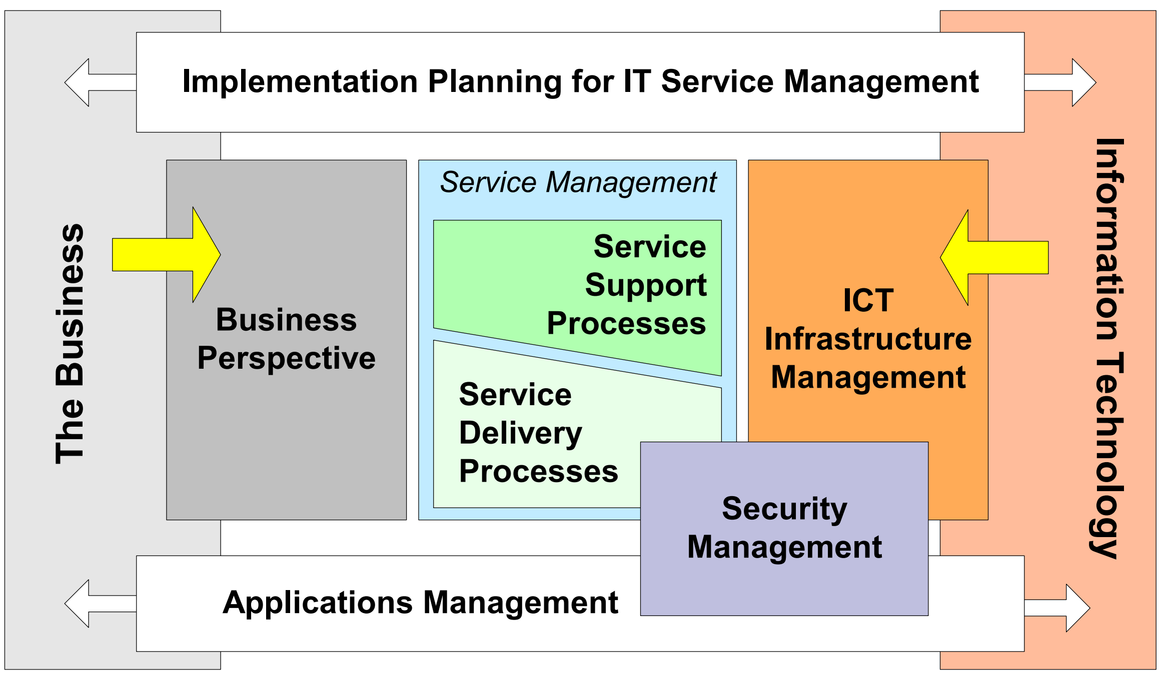
The Structure of ITIL

ITIL is organized into sets of published texts which are defined by related functions: service support, service delivery, managerial, software support, computer operations, security management, and environmental (facilities).

In addition to texts, ITIL services and products include training, guidance, qualifications, software tools, and user groups such as the IT Service Management Forum (*it*SMF.)

ITIL user groups and software tools are vendor neutral.

Figure 2 - The Structure of ITIL



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ITIL Overview continued

What ITIL Is *Not*

ITIL is *not*:

- a proscriptive standard,
- a methodology, or
- a step-by-step manual.

Implementation of ITSM will vary by organization. ITIL focuses on best practice; as such, it can and should be adapted and adopted in different ways according to each individual organization's needs.

History of ITIL

In the late 1980s, the United Kingdom's Central Computer and Telecommunications Agency (CCTA) created ITIL. By the mid 1990s, ITIL had become a worldwide de facto standard in Service Management. The popularity of ITIL has led it to become a scaleable public domain framework.

Very large organizations, very small organizations, and everything in between have implemented ITIL processes.

While owned by the CCTA since the mid-1980s, ITIL is currently maintained and developed by the Office of Government Commerce (OGC).

Why ITIL?

As businesses become more dependent on technology, the need to establish and follow best practices and standards has become increasingly important. ITIL was created in response to the growing dependence on Information Technology to meet business needs, goals, and objectives.

The ITIL framework addresses critical issues such as IT skill-sets, customer service, security requirements, service management, the range and frequency of IT changes, and the increasing need to share information between business units.

An objective third-party evaluation of best practices and standards can help ensure efficient use, management, and deployment of IT assets.

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ITIL Overview continued

Benefits of ITIL

ITIL provides a systematic and professional approach to the management of IT service provision. Adopting its guidance can provide such benefits as:

- Reduced costs and justifiable expenses
- Improved IT services through the use of proven best practice processes
- Improved customer satisfaction through more professional service delivery
- Guidance in optimizing IT infrastructure
- Improved productivity
- Increased and/or more efficient use of skills and experience
- Increased customer confidence in delivered services by using specifications of ITIL or BS15000 as a standard for procurement of services

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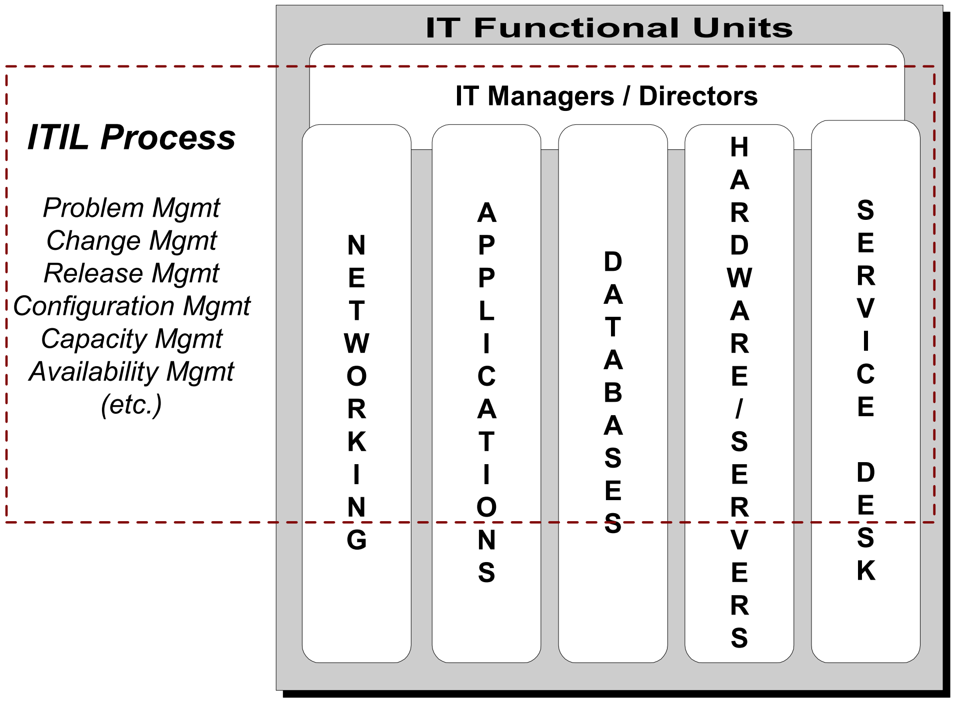
ITIL Overview continued

How ITIL Fits into IT Organizations

- IT organization are often grouped into functional "silos" by skill-set.
- ITIL processes span the functional units of an IT organization.
- This is illustrated below.

Figure 3 - Common IT Organization Structure



- Example 1: *XYZ Service Provider* designates an Agent in its Service Desk group is classified as Level 1 customer support. Junior network services and/or hardware engineers are designated as Level 2 support, while senior engineers in various groups are designated Level 3 support. A user cannot get his office application to work properly (today, it's suddenly crashing his machine). The Service Desk agent cannot diagnose or correct the problem, so he/she escalates it to Level 2 support in the Applications group. Although they are in different units of the IT organization, both are operating in this case as part of Incident Management.
- Example 2: While changes are designed by a Change officer within IT at *XYZ Service Provider,* he/she relies on the expertise of engineers in all of the groups to provide input for the impact analysis and to coordinate pieces of the rollout. In fact, a member of each group sits on the Change Advisory Board. All groups are now part of Change Management.

ITSM Terminology

Terms

The following table presents the IT terminology used throughout this course.

Term	Definition
Alert	A warning, often automated, that an incident or failure has occurred
Asset	Component of a business process. In Maximo, assets include such things as people, facilities, hardware, software, licenses, networks, and documentation.
Audit Report	A report whose purpose is inspection, verification, and correction. Audits are used to check the economy/efficiency/effectiveness of an activity or process to confirm that it is being carried out to a common standard.
Availability	Ability of a component or service to perform its required function at a stated instant or over a stated period of time. It is usually expressed as the *availability ratio*, or the proportion of time that the service is available for actual use by the customers within the agreed service times.
Business Impact Analysis (BIA)	The identification of critical business processes, and the potential damage or loss to the business that might be caused to the organization resulting from service or process disruption. Also, the identification of the form loss or damage will likely take; how that loss or damages escalates with time; minimum staffing, facilities, and services needed to enable processes to continue to operate at a minimum acceptable level; and the time within which they must be recovered (both partially and fully).
Business Unit (Function)	A segment of the business entity by which revenues are received and expenditures are caused or controlled, and to which both are measured or attributed.
Change	The addition, modification, or removal of approved, supported, or baselined configuration items. In Maximo, a change is a type of work order.
Change Advisory Board (CAB)	A group of people responsible for assessing from both a business and technical viewpoint all requests for change (RFCs). Advises on RPF priorities, maintains schedule of changes, and proposes resource/personnel requirements to implement changes.
Charging	The process of establishing charges in respect of business goals to recover costs of IT services.

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ITSM Terminology continued

Terms continued

Term	Definition
Classification	Formal identification of incidents, problems, and known errors by origin, symptom, and root cause.
CMDB	A database that contains all relevant details of each CI and details of the important relationships between CIs.
Configuration item (CI)	A component of an infrastructure, or an item such as a request for change, associated with an infrastructure that is (or will be) under the control of Configuration Management. Note: Maximo refers to CIs as 'Assets.'
Customer	Recipient of the service. Usually the Customer management has responsibility for the funding of the service.
Definitive Hardware Store (DHS)	A library where all authorized hardware components are held in their definitive state.
Definitive Software Library (DSL)	A library where all quality-controlled versions of all software configuration items are held in their definitive, i.e., licensed, form.
Delta release	A release that contains only those items that have changed or been repaired since their last recorded version.
Dependency	Reliance of one process or activity, directly or indirectly, on another.
Disaster Recovery (DR)	Processes focused on the recovery of services primarily in response to physical disasters as defined by IT Service Continuity Management.
Discovery Tool	Software that scans and reports against an IT infrastructure for deployed assets.
Error (or known error)	A condition identified by the successful diagnosis of the root cause of a problem, indicating that an infrastructure component, i.e., CI, is at fault.
Error control	Identifying, recording, classifying and progressing known errors, up to and including resolution by successful replacement/change.
Escalation	Passing information to and/or requesting action from a more senior staff or specialist regarding an incident, problem, or change.

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ITSM Terminology continued

Terms continued

Term	Definition
Failure	The termination of the functional unit's ability to perform its required function.
Full release	A release that replaces all components of a release unit, regardless of whether or not they have changed since their last recorded version.
ICT	Information & Communications Technology. The convergence of IT, telecom, data, and networking technologies into a single technology.
Incident	Any event that is not part of the standard operation of a service and that causes, or might cause, an interruption to, or a reduction in, the quality of that service. In Maximo, an incident record is a type of service ticket.
Knowledge-base	Database that captures and ensures that the intellectual capabilities of an organization, such as solutions and workarounds, are shared, maintained and institutionalized.
MACs	An acronym for "Moves, adds and changes" that denotes activities in maintaining IT assets.
Operating Level Agreement (OLA)	An internal agreement covering the delivery of services that support the IT organization in their business-aligned delivery of services.
Package release	A combination of more than one delta or full release.
Problem	An unknown underlying cause of one or more incidents.
Provider	The unit responsible for the provision of IT services.
Reconciliation	Action that matches deployed IT assets to planned, or authorized, IT assets.
Release	A collection of new and/or changed CIs, which are tested and introduced into the production environment together. In Maximo, a release is a type of work order.

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ITSM Terminology continued

Terms continued

Term	Definition
Service	The deliverable of the IT Services organization as perceived by its customers (end-to-end). This can include several systems or services in combination.
Service Catalog	Written statement of agreed-upon IT services, default levels, and options.
Service Desk	Single point of contact for customers. Its aim is to restore service as quickly as possible for the user.
Service Level Agreement (SLA)	A formal negotiated document that defines in quantitative terms the service being offered to a customer by the service provider.
Service ticket (or ticket)	In Maximo, any one of the following: a Service Request (SR) that leads to creation of an Incident, Problem, or Release record.
Solution	A remedy to a known error, documented and provided through the knowledge base to the service desk or to users as a self-service option.
Supplier	A third party responsible for supplying or supporting underpinning elements of the IT services.
Underpinning Contract (UC)	A contract with an external supplier covering delivery of services that support the IT organization in its delivery of services.
User	The person using the service on a daily basis.
Work-around	Method of resolving an incident or avoiding a problem, either from implementing a temporary fix to restore service quickly, or because the customer no longer uses a particular component/ aspect of the service known to have a problem.
Work Order	A work order specifies particular tasks to be accomplished, and the labor, materials, services, and tools needed to complete the work. Changes and Releases are types of work orders in Maximo. When you create a work order, Maximo captures a historical record of work requested and performed.
Workflow Diagram	A workflow diagram maps out the way the work is currently done, showing each step taken, the decision branches, time spent, distance traveled or people contacted. The Workflow functionality in MXES allows Maximo users to automate the process described in a workflow diagram.

MXES and ITSM

Introduction

Much has been said about the merits of looking at the "three Ps" (people, processes, and products) of IT service delivery independently.

In attempts to implement ITSM using the ITIL framework, many companies overlook the opportunity to use software (products) to improve parts of the service support processes—for example, automation via a Workflow tool—while they are describing and documenting the processes such software is to support.

How MXES Supports Current Industry Needs

MXES has been designed to meet current ITSM needs from both a business and a technical perspective.

Industry Need	How MXES Supports the Need
Establish and follow best practices and standards	Designed to take full advantage of the ITIL best practice framework using out of the box product functionality and product flexibility
Manage broad end-user/customer requests, changes, issues, etc.	• Different types of tickets/service requests/work requests to manage the different types of processes within any organization; not only IT, e.g., Facilities, Manufacturing, Aviation, etc. • Provides support for IT Outsource Service Provider who might have above types of clients.
Flexibility in implementation to meet customized processes/business needs	• J2EE Web architecture uses a purely XML front end for a high degree of customizability and configurability. • Supports SOA and Web Services • Built-in tools such as the Application Designer and DB Configuration allow customers to tailor and/or extend Maximo's functionality to suit their needs

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MXES and ITSM continued

How MXES Supports Current Industry Needs continued

Industry Need	How Maximo Supports the Need
Manage IT services provided to the Business Units	Extensible DB structure that allows: • Tickets and Work Orders to be related to each other as well as related to CIs in the CMDB, service level agreements, and contracts. • Maximo functions as broad CMDB that provides the single point of contact to receive requests from end-users regardless of the nature of the issue or request • All Contracts, Requests for Quotations, Purchase Orders, Leases, Documentation, Training materials, and others can be stored and managed in Maximo as well as IT assets and service transactions • MACs, (Moves, Adds, and Changes) for all configuration items can be controlled and managed in Maximo. • Invoice and Billing can originate from Maximo.
Process automation	• Powerful and configurable Workflow, escalation, and notifications features provide the ability to adapt the system to business processes. No need for step-by-step manual process; workflow automatically drives users through the predefined processes. • Automated, action option based system allows administrators to manage the end-user product "experience" in support of a business process.
Manage and minimize IT costs	• Bulletin Board, Knowledge Base, Solutions Library to promote self-service and reduce calls to Service Desk. • Global issues – One parent ticket can manage many. • Ticket templates / job plans – reduce data entry. • Resource tracking – measure and manage how resources (people, material, tools, services, data, documents) are used.

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MXES and ITSM continued

How MXES Supports Current Industry Needs continued

Industry Need	How Maximo Supports the Need
Wide integration capability	Maximo Enterprise Adapter allows straightforward integration with third-party systems, including: • Out of the box and expandable ERP system integrations • Financial applications • Discovery tools (Maximo provides its own tool but also aggregates data from other third party providers) • Distribution software tools • Procurement Systems • Service Desk or Help Desk Systems • Contract Systems • Asset Management Systems (MXES has its own tool but is still open to integrate to other systems)
User and Administrator Interface	• 100% Web browser, user-friendly • Administer users, security settings, are contained in single software package • Role and organization based security for Security Compliance.

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MXES and ITSM continued

How MXES Supports Current Industry Needs

continued

Industry Need	How Maximo Supports the Need
Enhance business productivity and cost efficiency	• Reduce and predict IT Infrastructure downtime via controlled and planned, change, release, and configuration management • Auto-identify priorities based on service, asset, or user, contracts • Manage and capture costs associated with failures and remedies/solutions or workarounds • Integrated Service Level Management capability
Reporting Capability	• Easily configurable, front-end generated reporting via Actuate • Simple setup and display of key performance indicators (KPIs) via KPI Manager function to provide “at-a-glance” information • Web-based query tool designed to allow end-users of all levels of computing sophistication to issue ad-hoc queries without having to know the location or structure of the underlying data. • **e.Report Designer/ e.Report Designer Professional**. Reports created in e.Report Designer require no programming. Lets a report developer deliver any information in the database in a customized format. Present reports in any conceivable layout, regardless of complexity. • **Maximo e.Spreadsheet Designer** lets business users build reports rapidly, using a unique environment that closely resembles MS Excel.

MXES and ITSM continued

Service Delivery and Support Revisited

Recall our earlier IT Delivery and Support model in Figure 1 - IT Service Support & Delivery Model on page 2-5.

There are five processes in the *Service Support* area:

- Incident Management
- Problem Management
- Change Management
- Release Management
- Configuration Management

These five processes, along with the Service Desk function, are interrelated.

Additionally, there are five processes in the *Service Delivery* area:

- Service Level Management
- Availability Management
- Capacity Management
- IT Service Continuity Management
- Financial Management

Note: Additionally, there is an ITIL publication regarding Security Management. All of the Management Areas are interdependent and influenced by security. Security processes are implemented as far as possible into the other processes.

MXES and Service Support

Introduction

Service Support generally concentrates on the day-to-day operation and support of IT Services.

Service Support Process Map

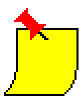
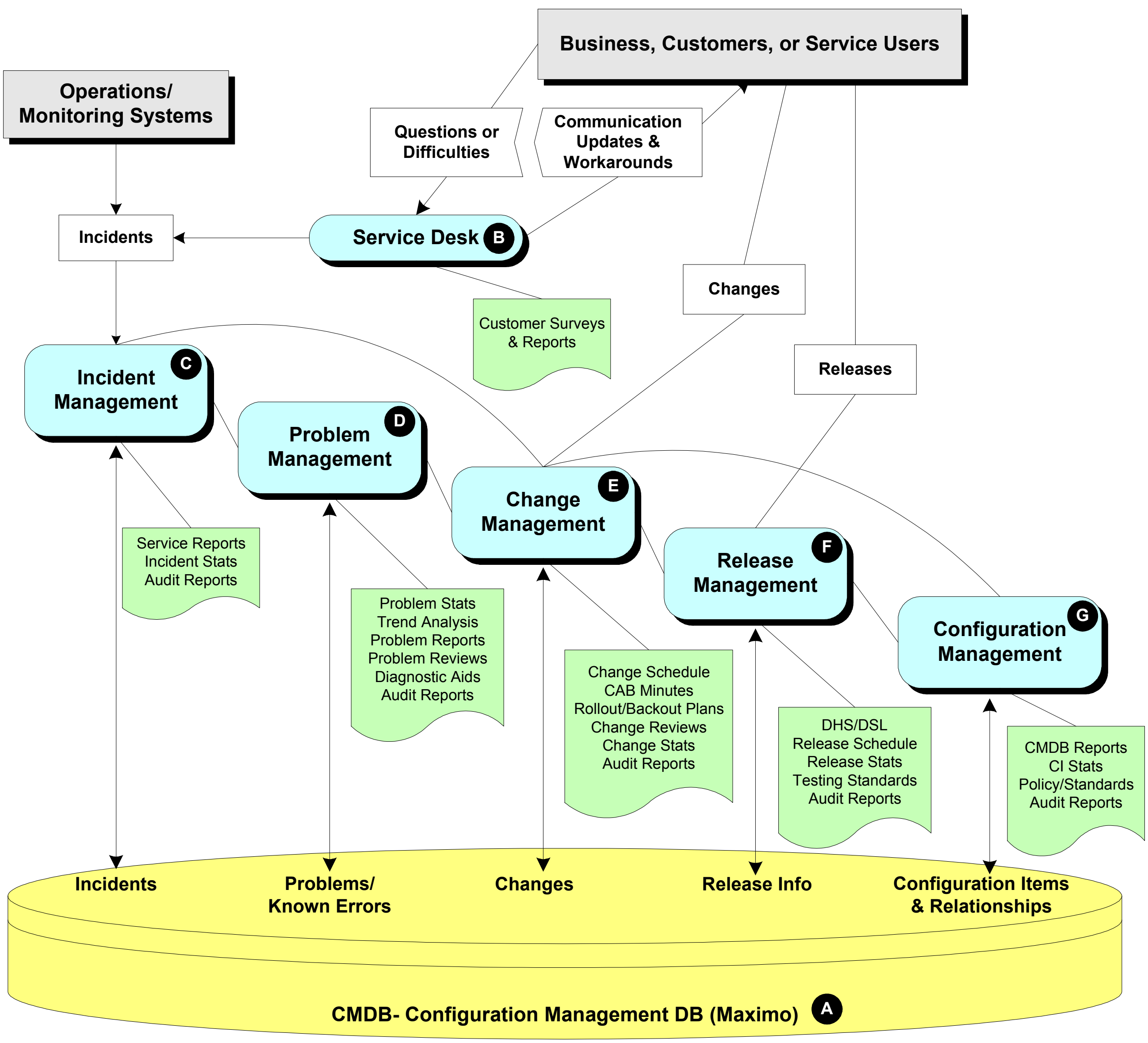


Figure 4 illustrates the major interfaces and deliverables for these processes in *Service Support*. We will refer to this diagram when discussing Service Support processes in relation to MXES.

Note: This is a diagram of the relationships between the various Service Delivery processes. This is NOT INTENDED to be a process flow diagram.

Figure 4 - IT Service Support Map



MXES and Service Support continued

How Maximo Applications Act on the Database

Maximo applications function either to *build* or to *act on* the database (CMDB). Although many applications in a given ITSM process will build *or* act on the database, some applications can do both.

- Processes that primarily build the database create *transactional* data.
- Processes that primarily act on the database create *configuration/setup* data.

Relating Maximo Applications/ Functions to Service Support Processes

The following tables list the Service Support processes and functions from Figure 4 - IT Service Support Map on page 2-20 in relation to Maximo applications.

Each process or function corresponds to its letter designation on the Map.

Function	Description	Relevant Maximo Applications
CMDB (Maximo) A	Maximo functions as the CMDB. It collects data input from all the *transactional* processes as well as what was entered as part of *configuration/setup*, and outputs information for users functioning in all ten ITSM processes.	• The Maximo DB
Service Desk B	This function of Maximo owns the Incident Management process and operates as a single point of contact for customers and users who have inquiries or requests. Type of Data Generated: *Transactional*	• Service Desk module • Self-Service Module • Solutions library

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MXES and Service Support continued

Relating Maximo Applications/ Functions to Service Support Processes continued

Process	Description	Relevant Maximo Applications
Incident Management C	<u>Goal</u>: to coordinate the rapid restoration of the expected level of service, even if the solution is a workaround. This process is owned by the Service Desk function. (<u>Note</u>: this process does *not* identify underlying root causes and fix errors, nor are incidents escalated into problems, although they may lead to the generation of a problem record.) <u>Type of Data Generated</u>: *Transactional*	• Use *Incidents* to create and modify incident records. • Tickets entered via *Service Requests* may be converted to incidents, if desired. • *Workflow* and *Escalation Manager* can automate the flow of tickets through MXES. • *Global issues* allow one ticket to manage many • Tie incidents to SLAs
Problem Management D	<u>Goal</u>: to find the root cause of a problem, or potential problem, and effect the removal of the error from the infrastructure. Create a problem record to record an unknown, underlying root cause of one or more incidents. <u>Type of Data Generated</u>: *Transactional*	• Use *Problems* to create and modify problem records. • Record *Logs* and *Failure Classes* to capture and track Known Errors • Match *Problem* records to *Incidents* • Tie problems to SLAs

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MXES and Service Support continued

Relating Maximo Applications/ Functions to Service Support Processes continued

Process	Description	Relevant Maximo Applications
Change Management E	Goal: to help maximize the benefits to the business of making changes to the IT infrastructure while minimizing the risks involved in making those changes. Type of Data Generated: *Transactional*	• Use *Change Manager* to plan, review, communicate, and deploy changes to existing CIs (IT assets) • Create and maintain a Forward Schedule of Change report • Also, changes can be created via *Work Orders*. • Tie changes to SLAs
Release Management F	Goal: to manage the release of authorized versions or configurations of assets into a production environment, for large or critical hardware rollouts, for major software rollouts, and for bundling related sets of changes. Releases detail the tasks, scheduling, and people or groups involved in the release. Type of Data Generated: *Transactional*	• Use *Releases* to plan, review, and prepare for large batches of changes to assets. • Also, releases can be managed via *Work Orders*. • Tie releases to SLAs
Configuration Management G	Configuration Management is the process of identifying and defining CIs (a.k.a. Assets) in a system, recording and reporting the status of CIs and RFCs, and verifying the completeness and correctness of CIs. Type of Data Generated: *Configuration/Setup* and (Supports, records, and reports on *Transactional* data generated by Change and Release Management)	• Use Assets, Discovery, Item Master, Item Assemblies, Locations, Fusion, & Reconciliation applications to maintain your CMDB • Apply SLAs to assets • Attach assets to incidents, problems, changes, and releases

MXES and Service Delivery

Introduction

Service Delivery processes are responsible for the long-term planning and improvement of IT service provision.

Service Delivery Process Map

Figure 5 illustrates interfaces and deliverables for processes within *Service Delivery*. We will refer to this diagram when discussing Service Delivery processes in relation to MXES.

Note: This is a diagram of the relationships between the various Service Delivery processes. This is NOT INTENDED to be a process flow diagram.

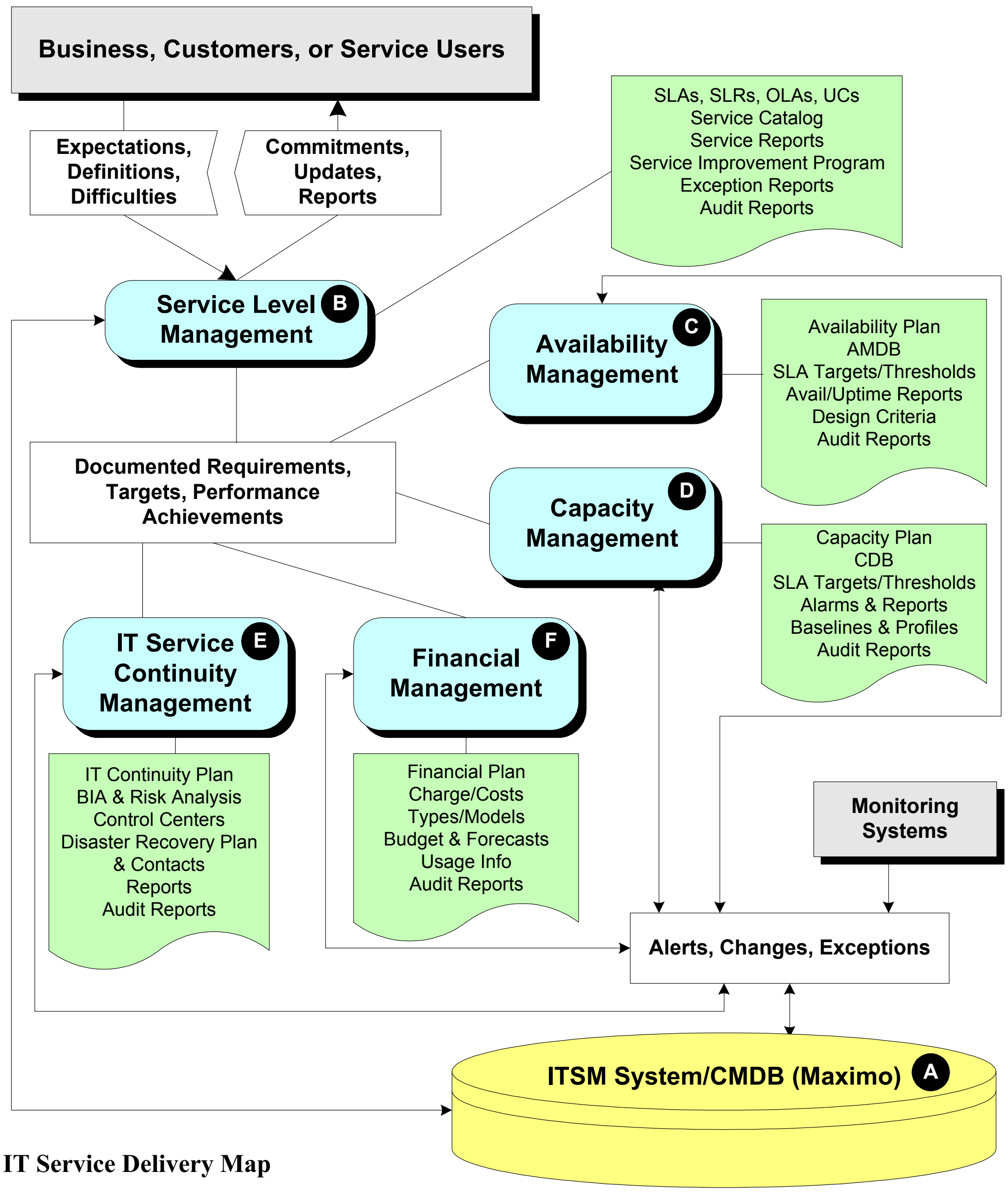

Figure 5 - IT Service Delivery Map

MXES and Service Delivery continued

Relating Maximo Applications/ Functions to Service Delivery Processes

The following tables list the Service Support processes and functions from Figure 5 - IT Service Delivery Map on page 1 in relation to Maximo applications.

Each process or function corresponds to its letter designation on the Map.

Function	Description
ITSM System/CMDB (Maximo) A	Maximo functions as both the CMDB and IT Service Management System. It collects data input from all the *transactional* support processes and also stores documentation such as plans, SLAs, targets, and so forth that was created during implementation and maintained as part of the Change Management process. Maximo then outputs performance such as reports and KPI information for users functioning in Service Delivery ITSM processes.

Process	Description	Relevant Maximo Applications
Service Level Management B	Goal: to establish, maintain, review, and improve business-aligned IT service quality.	• Use *SLAs* to create Service Level Agreements. • Publish and Maintain a *Service Catalog* in Maximo • SLAs can be applied to assets and transactions. • Use *Contracts* to set up UCs and OLAs
Availability Management C	Goal: to optimize capabilities of the IT infrastructure and supporting IT organization to deliver a cost-effective, maintainable availability level that meets business objectives and SLAs. You create a problem record to record an unknown, underlying root cause of one or more incidents.	• Use *KPI Manager* to create KPIs, *Reports* to create management audits such as uptime, downtime, and MBTF. • Attach availability plan & requirements docs to assets • Use Maximo Discovery to view deployed assets • Track Failure Classes & Codes and view affected Users & Assets to make Availability assessments

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MXES and Service Delivery continued

Relating Maximo Applications/ Functions to Service Delivery Processes

continued

Process	Description	Relevant Maximo Applications
Capacity Management D	Goal: to optimize the delivery of IT services by managing demand for services to resources.	• Use *KPI Manager* to create KPIs, *Reports* to create asset, utilization, and procurement data, as well as to develop forecasts. • Work closely with Configuration, Change & Release Management. • *Inventory* Procurement, *Contracts*, *SLAs,* and *Reports* allow capacity manager to review costs against existing CIs or proposed additions. • Applied SLAs allow Capacity Manager to see current services and current systems available, linked to persons. • Problem, Incident and Change reports allow Capacity Manager to review MACs that impact capacity.

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MXES and Service Delivery continued

Relating Maximo Applications/ Functions to Service Delivery Processes continued

Process	Description	Relevant Maximo Applications
IT Continuity Management E	Goal: to provide a systematic approach to the development of an IT Service Continuity Plan to ensure that IT services are protected or can be restored as quickly as possible after a disaster.	• Store baselines of production CIs in CMDB; update through Change Management. • Review baselines against SLAs to set priority for actions to restore services in appropriate order by priority to the business.
Financial Management F	Goal: to understand and control costs associated with the planning, development, delivery, and support of the IT infrastructure, and if necessary, to recover those costs from the users.	• Use *Assets*, *Deployed Assets, Contracts*, *Labor*, and *Invoices* • Use *Reconciliation* and *Reports* to track usage/cost for chargeback. • Integrate with third-party system via MEA. • Purchasing module shows Total Cost of Ownership of CI orService. • Costing info such as Contracts, procurement and SLAs assist in budgeting for IT costs.

Chapter Summary

Course Overview

IT Service Management (ITSM) processes vary from business to business. The Maximo Enterprise IT suite (MXES) is both flexible and robust enough to be tailored to support your organization's particular ITSM processes.

This chapter:

- introduced the fundamental ITSM concepts and terminology,
- reviewed the ten ITSM processes and the Service Desk function contained in the ITIL framework, as well as the security influence in each mgmt area, and
- identified the Maximo applications/functions that support ITSM processes.

ITSM Overview

ITSM is a systematic approach to the planning, development, implementation, delivery, and support of IT Services.

ITSM is a top-down, business-driven approach to the management of IT that addresses:

- the strategic business value generated by the IT organization, as well as
- delivery of the highest-quality IT service as defined by business needs.

ITSM is designed to focus on the people, processes, and technology issues that IT organizations face, including:

- Managing both customer and vendor relationships
- Managing IT processes

Essential Characteristics of ITSM

The following characteristics are essential for good IT Service Management:

- Customer focus
- Process orientation
- Proactive service management
- Optimized cost/performance

Definition of an IT Service

An IT Service is whatever the customer (user) perceives it to be.

Remember not to mistake an IT system for the whole end-to-end IT Service. An IT Service is often made up of many systems, e.g., e-mail service > e-mail server > network service > WAN > LAN > Internet access.

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Chapter Summary continued

IT Service Support & Delivery

- IT Service Management can be divided into two core areas:
  - *Service Support* processes are responsible for the day-to-day operation and support of IT Services.
  - There are five processes in the *Service Support* area. These five processes along with the Service Desk function are interrelated:
    - Incident Management
    - Problem Management
    - Change Management
    - Release Management
    - Configuration Management
- *Service Delivery* processes are responsible for the long-term planning and improvement of IT service provision.
  - There are five processes in the *Service Delivery* area:
    - Service Level Management
    - Availability Management
    - Capacity Management
    - IT Continuity Management
    - Financial Management
- Additionally, there is an ITIL publication regarding Security Management.
- *All ITSM Processes are interdependent*.

What Is ITIL?

ITIL is a customizable framework of best practices for Information Technology Service Management (ITSM) processes to allow organizations to achieve quality IT service and overcome difficulties associated with the growth and ongoing management of IT systems.

ITIL is organized into sets of texts defined by related functions: service support, service delivery, managerial, software support, computer operations, security management, and environmental (facilities).

What ITIL Is *Not*

ITIL is *not*:

- a proscriptive standard,
- a methodology, or
- a step-by-step manual.

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Chapter Summary continued

How ITIL Fits into IT Organizations	• ITIL processes span the functional units of an IT organization. • ITIL provides a continuous improvement plan/process for the organization to model against.

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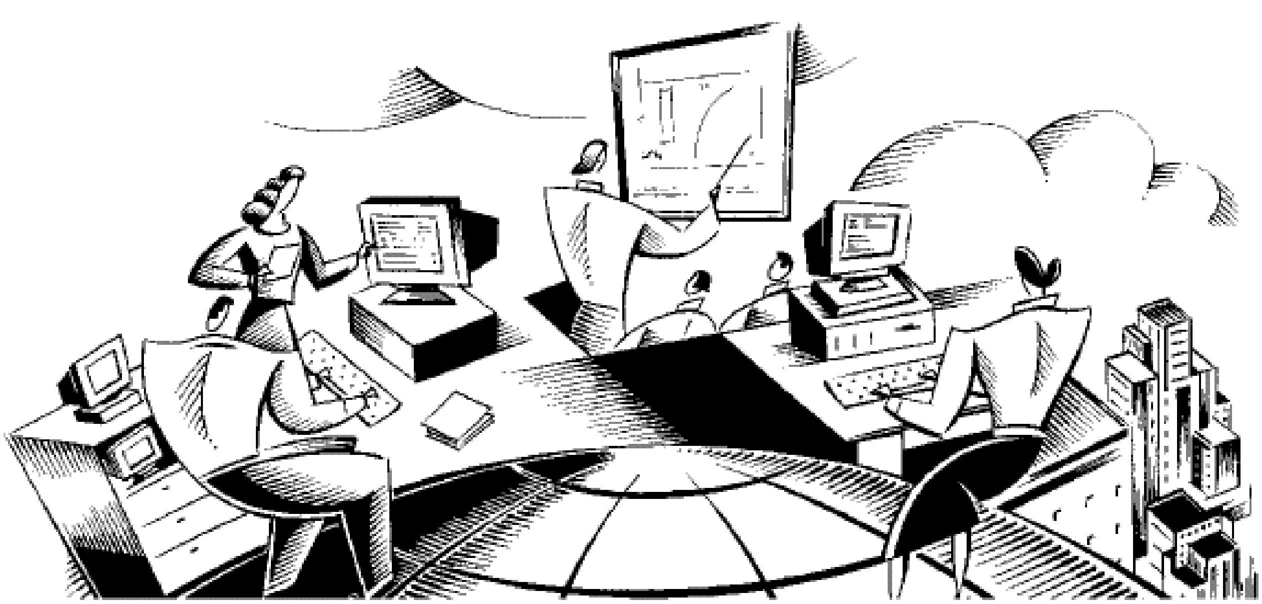
Chapter 3: Supporting Data—Overview



In This Chapter

This chapter contains the following topics:

Chapter Overview

Introduction

This chapter discusses some of the data and the applications necessary to set up Maximo to use some of the ITSM best practices.

Chapter Focus

This chapter focuses on the following types of data:

- Communication templates
- Ticket templates
- Solutions/solution searching
- Service level agreements (SLAs)
- Workflow

Learning Objectives

When you have completed this chapter, you should be able to:

- Explain the use of ticket templates in Maximo
- Create a ticket template in Maximo
- Explain the use of communication templates in Maximo
- Create a communication template in Maximo
- Explain the use of service level agreements in Maximo
- Describe the use of Workflow for ticket management in Maximo

Overview: Setting Up Maximo for ITSM

Introduction

Listed below is some of the functionality and applications you use in Maximo to support efficiency and IT Service Management (ITSM) best practices:

- Templates
- Solutions/Solutions Knowledge Base
- Service Level Agreements
- Workflow

In this chapter, we will set up some simple data to demonstrate how Maximo supports some of the ITSM processes.

Later in this course, we will go into detail with each of the various Maximo applications and show how each supports ITSM processes.

Templates

Maximo supplies two types of templates:

- Communication templates
- Ticket templates.

You use communication templates to create and manage generic communication templates that Maximo users can leverage to standardize frequently used e-mail communications (also known as *notifications*).

You use ticket templates to create and manage generic ticket templates that service desk environments can leverage to standardize common or high-volume service requests, incidents, or problems.

Solutions Knowledge Base

One of the main goals of a good service desk is to provide a consistent single point of contact for users. A best practice is to provide a good solutions knowledge base in support of your service desk. Maximo provides a Solutions application that you use to create and manage solution records in a service desk environment. It is an administrative application and is separate from the Search Solutions application that customers use to find solutions.

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Overview: Setting Up Maximo for ITSM continued

Service Level Agreements (SLAs)

A *service level agreement* is a written agreement between a service provider and customer that documents the agreed-upon levels of service. A *service* is a set of tasks provided by the service provider that fulfills one or more needs of the customer. You use the Service Level Agreements application to create and manage service level agreements (SLAs). The service level (known as a *commitment* in Maximo) describes a measurable or quantifiable aspect of that service. Maximo users can apply valid SLAs to records from other Maximo applications. In a Service Desk environment, a user with the proper permissions can apply an SLA from any of the Ticket or Work Order applications.

Workflow

A Workflow process can be thought of as a map that guides a record, or a user's interaction with that record through a set of steps. You can use Workflow to create a set of paths as simple or as complex as your business process demands. Each type of process should be able to handle all of the routing necessary for that kind of record. For that reason, Workflow processes can appear quite complex, but they are actually made up of simple components.

Communication Templates in Maximo

Communication Templates Application

You use the Communication Templates application to create and manage generic communication templates that Maximo users can leverage to standardize frequently used e-mail communications (also known as *notifications*).

For example, service desk agents can manually create and send e-mail communications from the ticket-related applications (Service Requests, Incidents, and Problems) using standardized information from predefined communication templates. The recipients of these communications can respond (using the proper e-mail format), and agents can view the two-way dialog from the Communication Log in the ticket applications. You can also use communication templates to create e-mail notifications for use with the automated workflow and escalation processes. One example is to create auto-responses to be used when a new ticket is created.

You can associate specific file attachments to a communication template, and you can associate document folders to the template, which Maximo will search when a service desk user applies the template to a ticket. When a communication is actually sent, Maximo attaches to the communication any files that exist in the associated document folders along with those hard-coded in the template itself.

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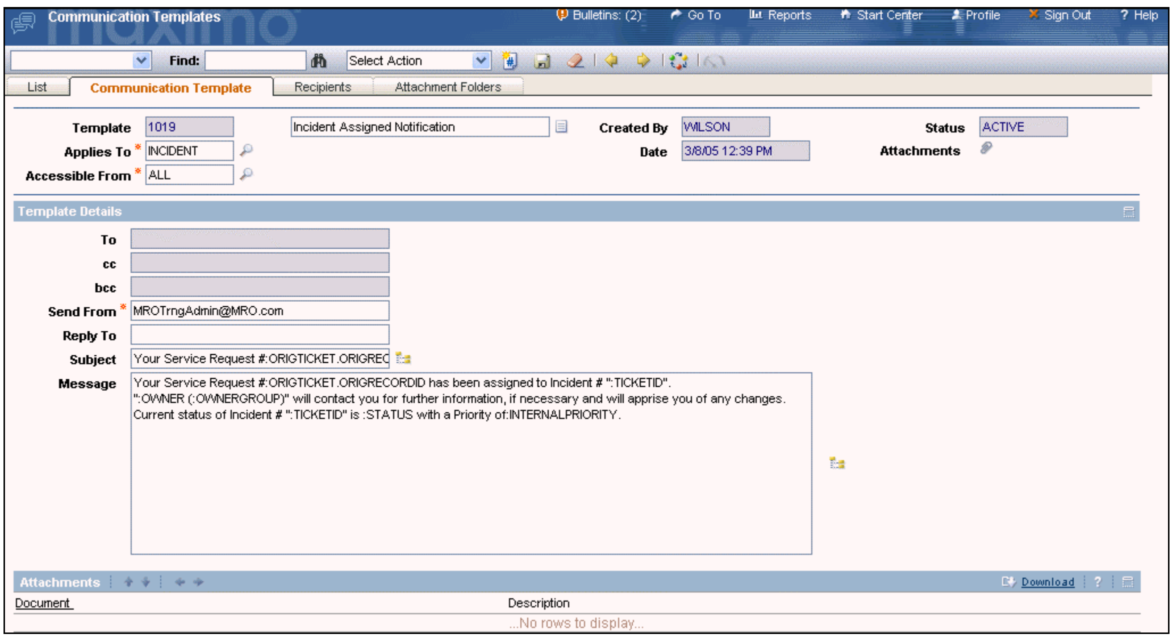
Communication Templates in Maximo continued

Communication Template Application Tabs

The Communication Template application contains the following tabs:

- **List** to search Maximo for communication template records.
- **Communication Template** to create, view, or modify a communication template.
- **Recipients** to associate the recipient for a communication template.
- **Attachments Folders** to associate attachment folders with a communication template.



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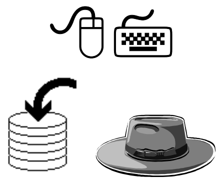
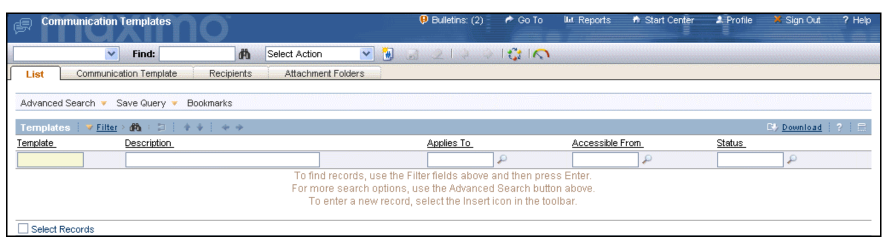
Communication Templates in Maximo continued

Exercise: Create a Communication Template



Scenario: A Maximo user submits a service request (SR). A service desk agent changes the SR into an incident and assigns the incident to another agent. Then the agent uses a Communication template to send a standard e-mail notification to the original Requestor, letting him/her know the status of his/her request.

Use the following steps to create this communication template.

Step	Action
1	Sign in to Maximo as Mark Wilson, a "super user." **User name** wilson **Password** wilson Note 1: Sign-in IDs and passwords are case sensitive. Note 2: Sign-in procedures are covered in the *MXES Navigation & Querying* course, and your instructor reviewed them with you in Chapter 1. Result: Maximo displays the Start Center assigned to Mark Wilson.
2	Open the **Communication Templates** application: **Go To > Configuration > Workflow > Communication Templates** Note: Navigation is covered in the *MXES Navigation & Querying* course. Information is also available in Maximo Help. Result: Maximo displays the List tab of the Communication Templates application. 

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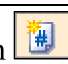
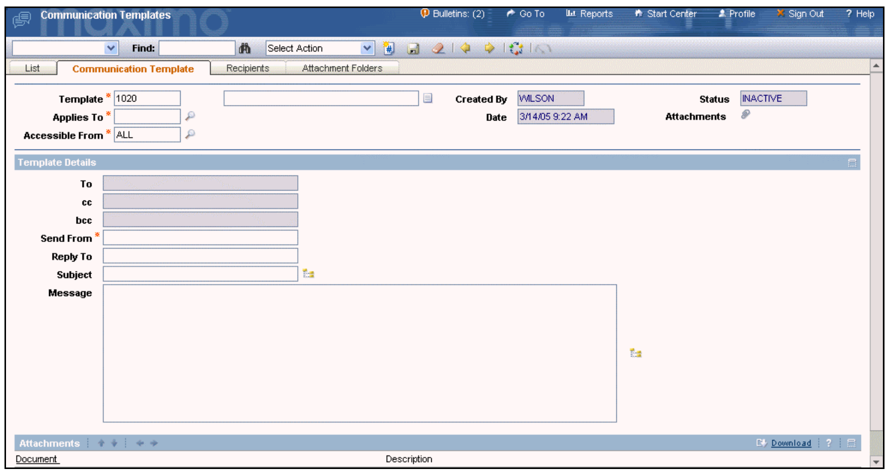
Communication Templates in Maximo continued

Exercise: Create a Communication Template continued

Step	Action
3	Click the **New Communication Template** icon . Result: The **Communication Template** tab opens with a new record ready for editing.  Write your template # here: ______________________.

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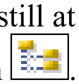
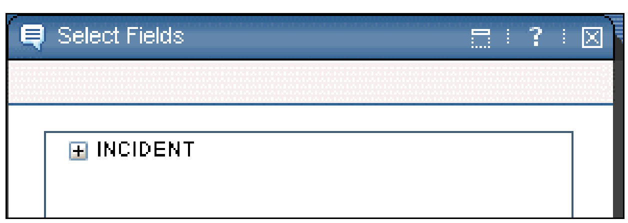
Communication Templates in Maximo continued

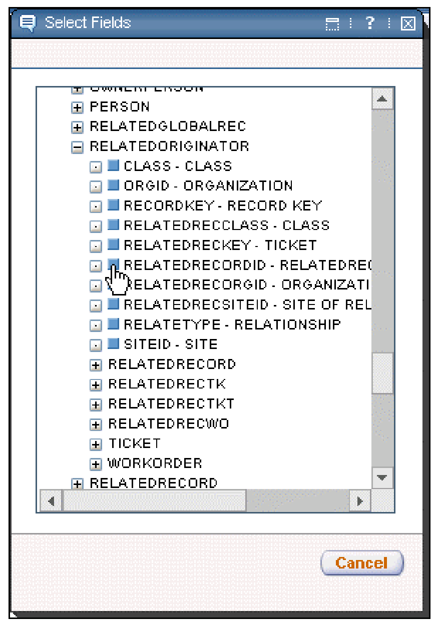
Exercise: Create a Communication Template continued

Step	Action
4	Enter the following data: **<u>Field</u>** — **<u>Value</u>** **Description** — Incident Assigned Notification *xx* (where *xx* represents your student # in an MRO hosted training environment) **Applies To** — Incident **Send From** — MROTrng@HotPop.com <u>Note</u>: The "Send From" value depends on your training environment. Please refer to Chapter 1 or ask your instructor if you are unsure. **Subject** — Your Service Request #
5	**Save** your record. <u>Result</u>: Your new communication template, though it is not finished, is now saved in the database with an INACTIVE status.
6	With your cursor still at the end of the **Subject** field, click the **Detail Menu** icon . <u>Result</u>: The Select Fields dialog box opens. 
7	Click the + (plus) sign to expand the list.

continued on next page

Communication Templates in Maximo continued

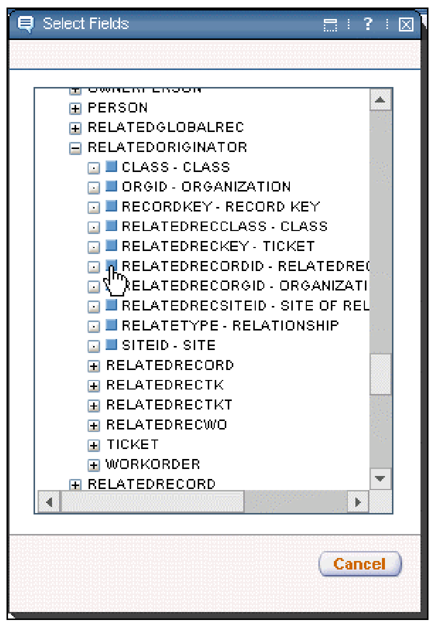
Exercise: Create a Communication Template continued

Step	Action
8	Scroll down the list until you see **RELATED ORIGINATOR** and expand it. Result: Your display should look similar to this. 

continued on next page

Communication Templates in Maximo continued

Exercise: Create a Communication Template continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9</td><td>Now scroll down the list until you find
RELATEDORIGINATOR.RELATEDRECKEY - TICKET
and click to select this value:


<u>Result</u>: The Select Fields dialog box closes, and your selected value now displays in the Subject field:
Your Service Request #
:RELATEDORIGINATOR.RELATEDRECKEY</td></tr>
<tr><td>10</td><td>Save your record.</td></tr>
</table>

continued on next page

Communication Templates in Maximo continued

Exercise: Create a Communication Template continued

Step	Action
11	Enter the following information into the **Message** field. Warning: Do not put any characters (other than spaces) either directly before or directly after any of the field name variables, otherwise they may not be interpreted properly. That is why, in this exercise, there are no periods at the end of sentences that end with a field name variable. Note: Remember to use the **Select Value** list (**Detail Menu** icon). Your Service Request # :RELATEDORIGINATOR.RELATEDRECKEY has been assigned as Incident # :TICKETID :OWNER :OWNERGROUP will contact you for further information if necessary and will apprise you of any changes. The current status of Incident # :TICKETID is :STATUS with a Priority of :INTERNALPRIORITY In replying to this e-mail notification, please remember to use the following subject: # :RELATEDORIGINATOR.RELATEDRECKEY #

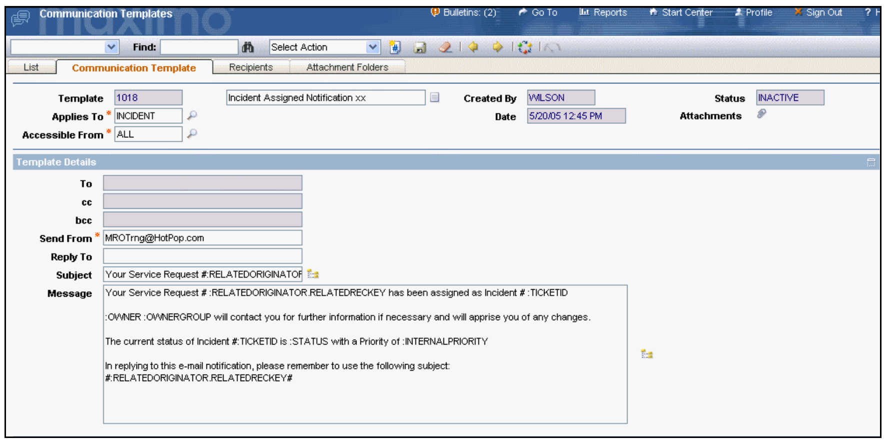
continued on next page

Communication Templates in Maximo continued

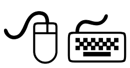
Exercise: Create a Communication Template

continued

Step	Action
12	**Save** your record, but do not close the Communication Templates application; we will continue the next exercise from this point. Result: Your record should look similar to this one.



Exercise: Creating a Role



Before we activate this particular template, we will create a role for the **To** field (Recipients). Use the following steps.

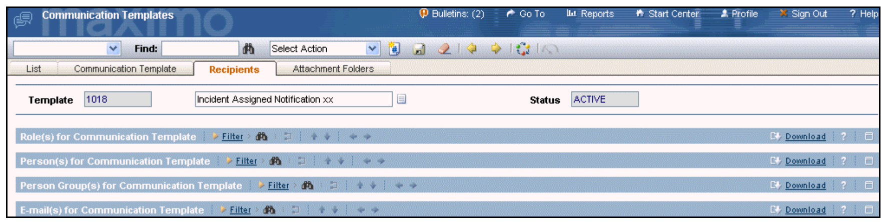
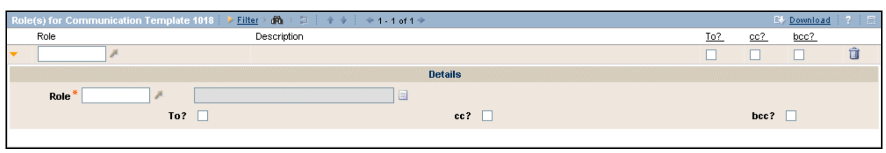
Step	Action
1	Ensure that your Communication template is open from the previous exercise.

continued on next page

Communication Templates in Maximo continued

Exercise: Creating a Role

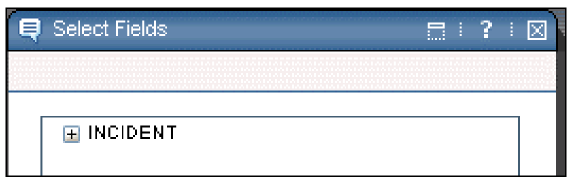
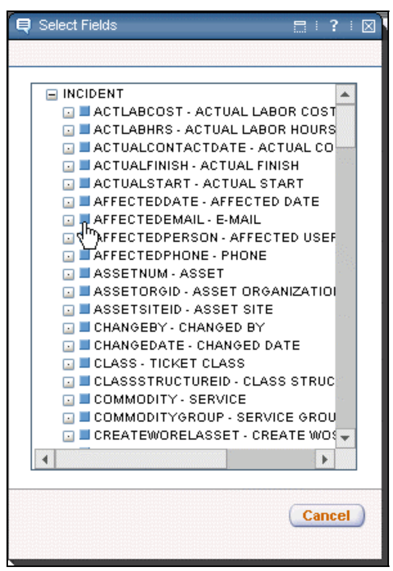
continued

Step	Action
2	Click on the **Recipients** tab. Result: The Recipients tab opens. 
3	Expand the **Role(s) for Communication Template** section by clicking the **Show Table**  icon. Result: The Role(s) for Communication Template section opens.
4	Click the **New Row** button. Result: A new row opens for editing. 
5	Choose **Go To Roles** from the **Detail Menu** for the **Role** field. Result: The Roles application opens to the List tab.
6	Click the **New Role**  icon to insert a new record. Result: The Roles application opens to the Role tab with a new record ready for editing.

continued on next page

Communication Templates in Maximo continued

Exercise: Creating a Role continued

Step	Action
7	Enter the following information: **<u>Field</u>** **<u>Value</u>** **Role** AFFECTEDBY **Description** Affected By **Object** INCIDENT **Type** DATASET (A set of data related to the record)
8	Click the **Detail Menu** for the **Value** field. <u>Result</u>: A Select Fields dialog box opens. 
9	Click the + (plus) sign to expand the selection list. <u>Result</u>: The Select Fields dialog box expands the list. 

continued on next page

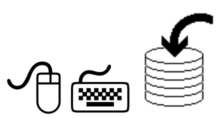
Communication Templates in Maximo continued

Exercise: Creating a Role

continued

Step	Action
10	Click to select **AFFECTEDEMAIL – E-MAIL**. Result: The Select Fields dialog box closes, and AFFECTEDEMAIL populates the Value field.
11	Click to select the **E-mail?** field. Result: A checkmark (✓) populates the E-mail? field.
12	**Save** the record and click **Return with Value** (upper right section of the screen). Result: The Roles application closes and returns to the Recipients tab populating the Role field with the new AFFECTEDBY role.
13	Click to select the **To?** check box, and **save** your record. Do *not* close the **Communication Templates** application; we will continue the next exercise from this point.

Exercise: Adding a Second Role



We will continue by adding a second role for the Reported By recipient. This will ensure that any communication that uses this template will go to everyone concerned.

Step	Action
1	Ensure that your Communication template is open to the **Recipient** tab from the previous exercise.
2	Click **New Row**. Result: A new row opens for editing.
3	Choose **Go To Roles** from the **Detail Menu** for the **Role** field. Result: The Roles application opens to the List tab.

continued on next page

Communication Templates in Maximo continued

Exercise: Adding a Second Role

continued

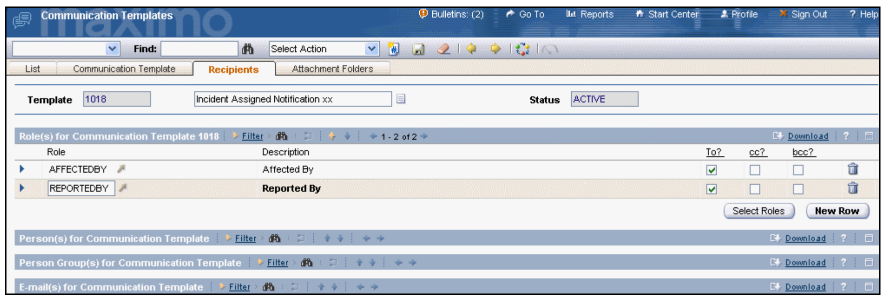
Step	Action
4	Click the **New Role** icon to insert a new record. Result: The Roles application opens to the Role tab with a new record ready for editing.
5	Enter the following information: **Field** — **Value** **Role** — REPORTEDBY **Description** — Reported By **Object** — INCIDENT **Type** — DATASET (A set of data related to the record)
6	Click the **Detail Menu** for the **Value** field. Result: A Select Fields dialog box opens.
7	Click the + (plus) sign to expand the selection list, then click to select **REPORTEDEMAIL – E-MAIL**. Result: The Select Fields dialog box closes, and REPORTEDEMAIL populates the Value field.
8	Click to select the **E-mail?** field. Result: A checkmark (✓) populates the E-mail field.
9	**Save** the record and click **Return with Value**. Result: The Roles application closes and returns to the Recipients tab populating the Role field with the new REPORTEDBY role.

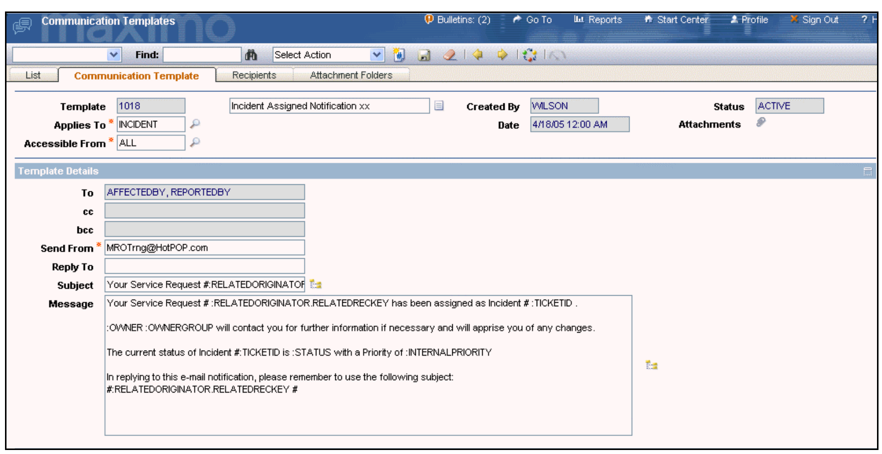
continued on next page

Communication Templates in Maximo continued

Exercise: Adding a Second Role

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>Click to select the To? check box, then save your record.
Result: Your Recipients tab should look similar to this.


</td></tr>
<tr><td>11</td><td>Select the Communication Template tab and review the record.</td></tr>
<tr><td>12</td><td>When you are satisfied, change the status to ACTIVE.
Note: Changing the status of a record is covered in the MXES Navigation & Querying course. Information is also available in Maximo Help.
Result: Your Communication template should look similar to this.


</td></tr>
<tr><td>13</td><td>Save the record and return to the Start Center.</td></tr>
</table>

Ticket Templates in Maximo

Ticket Templates Application

You use the Ticket Templates application to create and manage generic ticket templates that Service Desk environments can leverage to standardize common or high-volume service requests, incidents, or problems. You can save time by applying a predefined template to a ticket record, letting Maximo populate values from the template into fields on the ticket, which can be overwritten if needed.

For example, as an IT service provider, you receive a large quantity of requests to set up a home virtual private network (VPN) with a cable modem. As an administrator, you create a ticket template to handle these common VPN service requests. When Sandra in Support receives a call for VPN information, she creates a new service request and applies the VPN ticket template to the record. Maximo automatically categorizes the ticket, sets the internal priority, and supplies any other predefined values in the record's fields. Moreover, because a series of predefined steps always occurs to support access to the VPN, you can create these activities or leverage existing job plans and include them on your template. Maximo automatically generates these activities when Sandra applies the template, including any materials, time, labor, and services from a job plan.

For other Maximo users to apply a ticket template, the template must be in an ACTIVE status, and the template class must match the ticket class. In addition, if you specify a site on a ticket template when you create it, the available templates that a Maximo user sees when they apply a ticket template are those from the organization associated with that site or templates that do not have an organization defined.

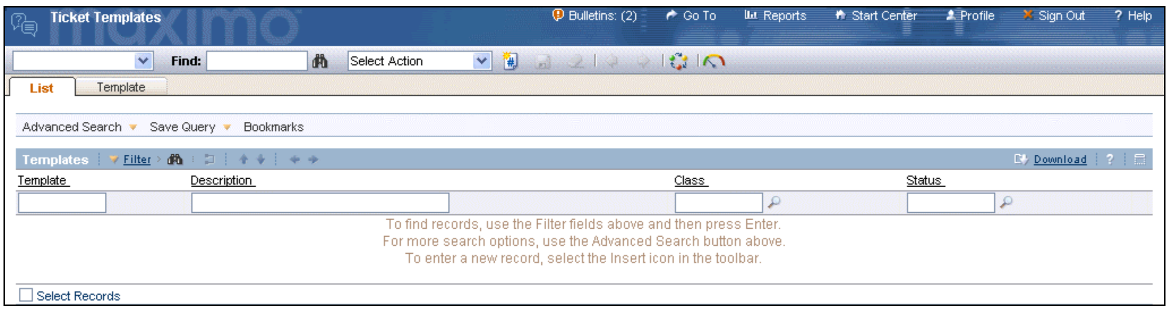
continued on next page

Ticket Templates in Maximo continued

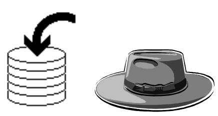
Ticket Templates Application Tabs

The Ticket Templates application contains the following tabs:

- **List** to search Maximo for ticket template records.
- **Template** to view, add, and modify ticket templates.



Exercise: Create a Ticket Template



Scenario: Your service desk gets many calls to reset passwords. A ticket template for incidents to reset passwords will save time filling in otherwise redundant information for each new ticket.

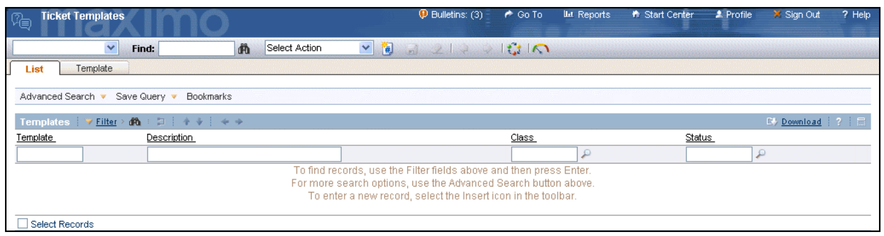
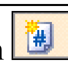
Use the following steps to create this ticket template.

Step	Action
1	Sign in to Maximo as Mark Wilson. **User name** wilson **Password** wilson Result: Maximo displays the Start Center assigned to Mark Wilson.

continued on next page

Ticket Templates in Maximo continued

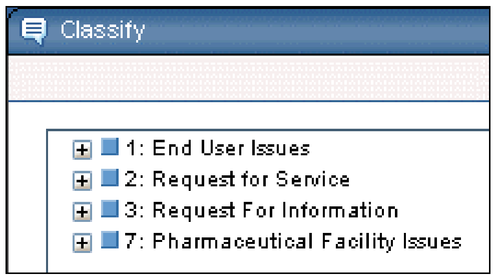
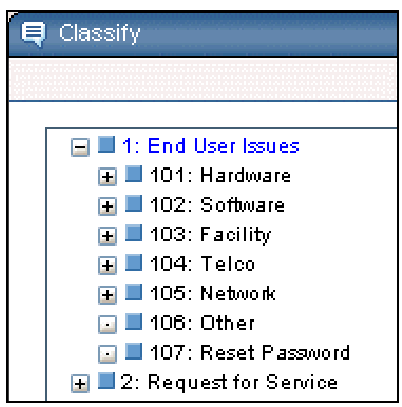
Exercise: Create a Ticket Template continued

Step	Action
2	Open the **Ticket Templates** application by using the **Go To** menu and choosing **Service Desk > Ticket Templates**. Result: The List tab of the Communication Templates application opens. 
3	Click the **New Template** icon . Result: The Template tab opens with a new record ready for editing. Write your new ticket template ID here: ______________________.
4	Enter the following data: **Field** — **Value** **Description** — Password Reset *xx* **Class** — INCIDENT **Owner Group** — TIER1 **Internal Priority** — 1 (Urgent) **Service Group** — IT **Service** — NETWORK **Classification** — [*see next step*] **Organization** — EAGLENA

continued on next page

Ticket Templates in Maximo continued

Exercise: Create a Ticket Template continued

Step	Action
5	Click the **Detail Menu** icon for the **Classification** field, and choose **Classify**. Result: The Classify dialog box opens. 
6	Click on the + (plus) sign to expand **1: End User Issues**. Result: Your Classify dialog box should look similar to this. 

continued on next page

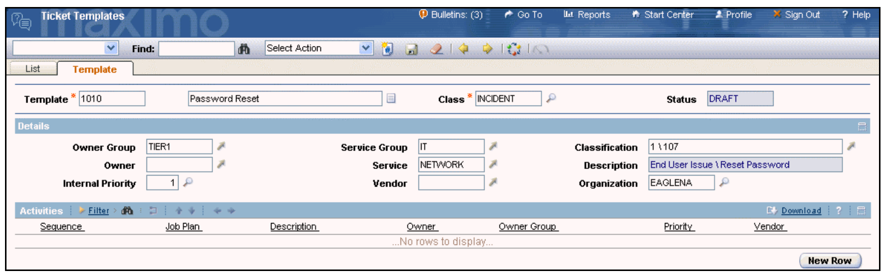
Ticket Templates in Maximo continued

Exercise: Create a Ticket Template continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>

Click to select **107: Reset Password**.

<u>Result</u>: The Classify dialog box closes and you are returned to your Ticket Template with your selected value in the Classification field and a description in the Description field.



</td></tr>
<tr><td>8</td><td>

Save your record.

<u>Result</u>: Your new ticket template, though it is not finished, is now saved in the database with a DRAFT status.

</td></tr>
<tr><td>9</td><td>Review your record and, when you are satisfied with it, change the status to ACTIVE.</td></tr>
<tr><td>10</td><td>Save the record and close the Ticket Templates application by returning to the Start Center.</td></tr>
</table>

Solutions in Maximo

Introduction

A *solution* is a predefined response to a commonly asked question or problem.

You use the Solutions application in Maximo to create and manage solution records in a Service Desk environment. It is an administrative application and is separate from the Search Solutions application that customers use to find solutions.

You can allow customers to search and view solutions from the Maximo simplified solutions knowledge base, called Search Solutions, to resolve their problems on their own.

Service desk agents can also use the Search Solutions application to resolve service desk calls and to search solutions not available to end-users.

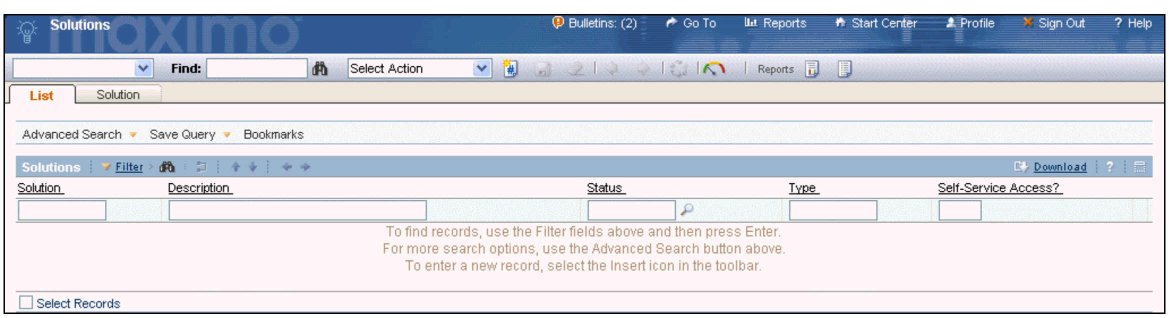
Solutions Application

As a solutions administrator, you create solution records using the Solutions application. In addition, Maximo users can create solutions by using the **Create > Solution** action from the **Select Action** menu of the Incidents and Problems applications. If you have an automated service desk environment, you can implement a workflow process to send a solution for review, approval, and activation. This also facilitates the free flow of solution information from your more senior reps to your level 1 reps, which increases your first-call resolution response.

Solutions Application Tabs

The Solutions application contains the following tabs:

- **List** to search Maximo for solutions records.
- **Solution** to add, view, or modify a solution record.



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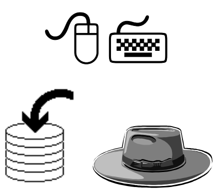
Solutions in Maximo continued

Solution Records

A solution record defines a symptom, a cause, and a resolution. To make it easier for customers or Maximo users to find the correct solution, you can classify solution records and/or group them by type.

Example: If you receive a lot of printer-related questions or issues, you could create a classification called IT > Printers > Toner. You would then assign that classification to any solutions that answer questions about toner or resolve toner problems. You can also use the **Type** field to sort or search solutions. You might choose to have types such as FAQ. If you do not classify solution records or group them by type, users can find solutions only by performing a text search in the Search Solutions application.

Exercise: Create a Solution



Scenario: A user finds that the printer’s toner appears to be running low as shown by poor/faded printing. Often, one can extend the life of a toner cartridge by removing the cartridge from the printer, shaking it, and putting it back into the printer. We will add this solution to the Solutions Knowledge Base in Maximo, approve it, and make it available to users.

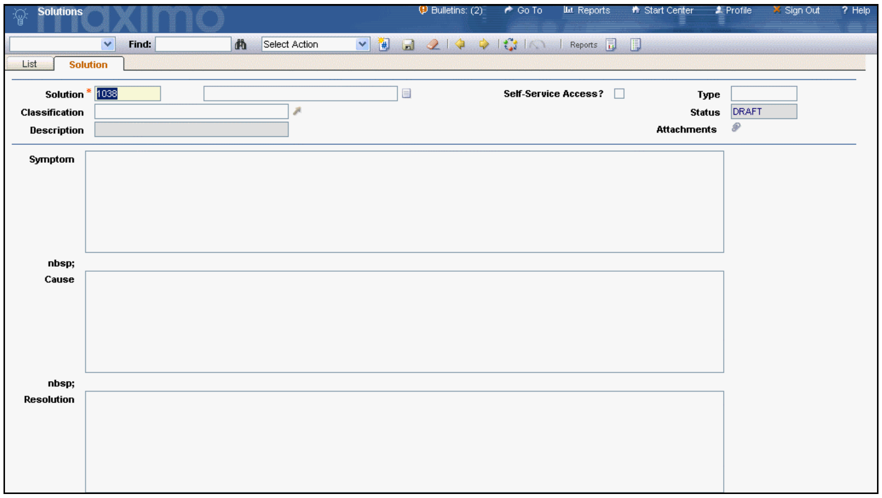
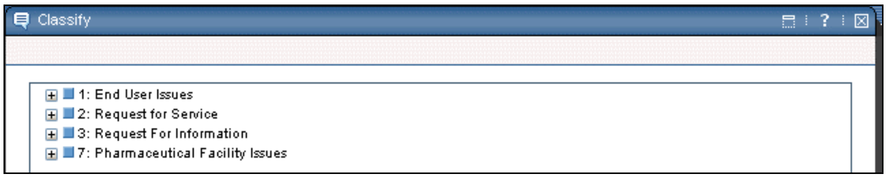
Use the following steps to create this solution.

Step	Action
1	Sign in to Maximo as Mark Wilson. Result: Maximo displays the Start Center assigned to Mark Wilson.
2	From your Maximo **Start Center**, open the **Solutions** application: **Go To > Service Desk > Solutions** Result: Maximo displays the List tab of the Solutions application.

continued on next page

Solutions in Maximo continued

Exercise: Create a Solution continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Click the New Solution icon .
Result: The Solution tab opens with a new record ready for editing.

</td></tr>
<tr><td>4</td><td>Record your new solution number here: ______________________.</td></tr>
<tr><td>5</td><td>Enter the following data:
<u>Field</u> <u>Value</u>
Description Printer toner cartridge is low xx</td></tr>
<tr><td>6</td><td>In the Classification field, click the Detail Menu icon and choose Classify.
Result: The Classify dialog box opens.

</td></tr>
</table>

continued on next page

Solutions in Maximo continued

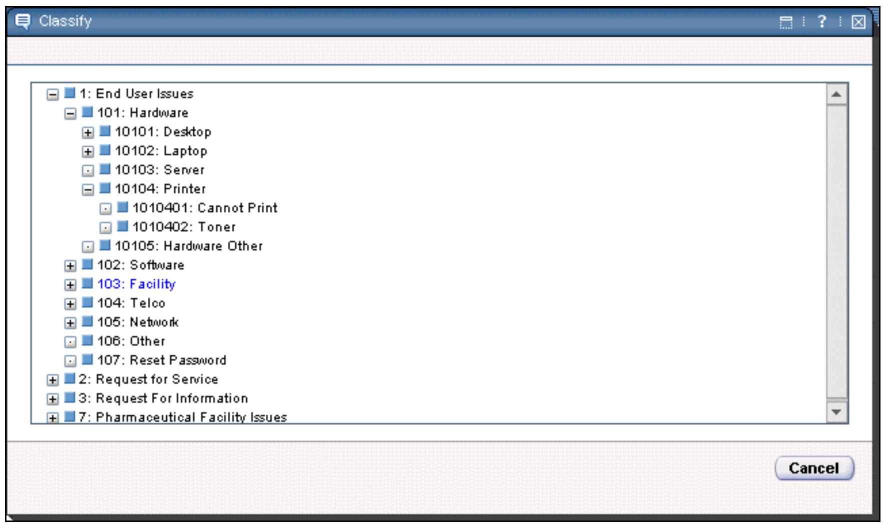
Exercise: Create a Solution

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>
Click on the + (plus) signs to expand the list, as follows:

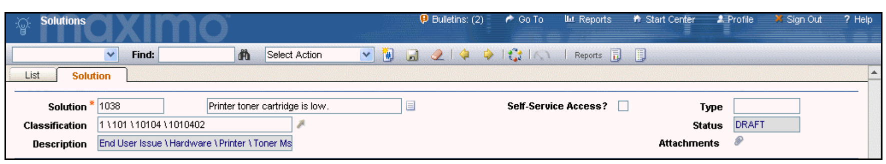
End User Issues | Hardware | Printer | Toner

Result: Your display should look similar to this one.



</td></tr>
<tr><td>8</td><td>
Click to select **Toner**.

Result: The Classify dialog box closes with your selection in the Classification field and a description in the Description field.



</td></tr>
</table>

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Solutions in Maximo continued

Exercise: Create a Solution continued

Step	Action
9	Enter the following data: **Field** / **Value** **Self-Service Access?** ✓ [*checked*] **Symptom** Printer is printing faded text. **Cause** Toner (toner cartridge) is getting low. **Resolution** Sometimes, as toner level decreases, you can extend the life of the toner cartridge by performing the following steps: 1.) Remove toner cartridge from printer. 2.) Shake toner cartridge to distribute toner. 3.) Replace toner cartridge back into printer. 4.) Check printed output. 5.) If printed output is still faded, then toner may have reached end of lifecycle. Submit a service request.

continued on next page

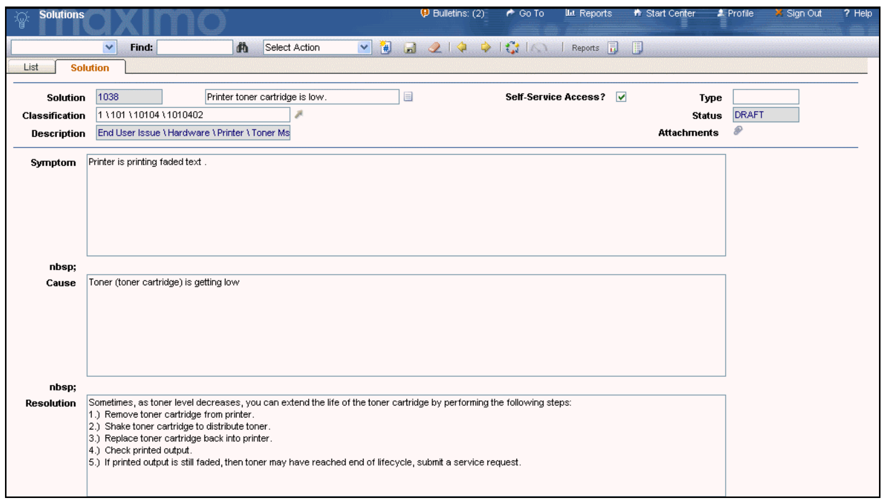
Solutions in Maximo continued

Exercise: Create a Solution continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>

Save the record.

Result: Your new solution, though it is not finished, is now saved in the database in DRAFT status.



</td></tr>
<tr><td>11</td><td>

Close the **Solutions** application by returning to the Maximo **Start Center**.

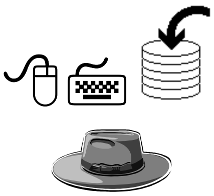
Note: If a Workflow process were created for this process, you could enter this record into Workflow for approval.

</td></tr>
</table>

continued on next page

Solutions in Maximo continued

Exercise: Activate a Solution



Scenario: As the solutions manager, you will review the solution from the previous exercise and approve it by changing its status to ACTIVE.

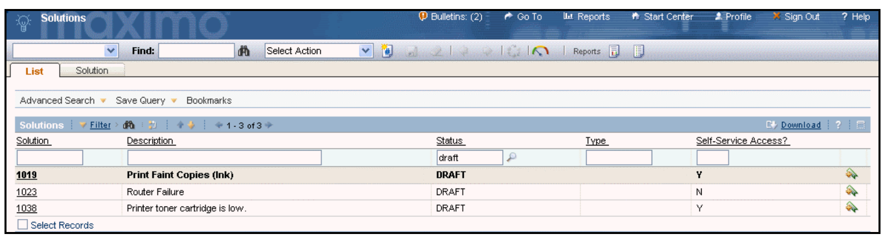
Use the following steps to activate this solution.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Sign in to Maximo as Mark Wilson and open the Solutions application.

Result: Maximo displays the Start Center for Mark Wilson.</td></tr>
<tr><td>2</td><td>Query for all DRAFT solutions.

Note: Queries are covered in the MXES Navigation & Querying course. Information is also available in Maximo Help.

Result: The List tab displays a list of all solutions in DRAFT status.



Note: If you are in an MRO hosted training environment, your display will differ significantly, with at least one additional record for each participant.</td></tr>
<tr><td>3</td><td>Click to select your solution.

Result: Your solution displays in the Solution tab.</td></tr>
<tr><td>4</td><td>Check to ensure that this record will be available to users of the Self-Service functionality.

Hint: The Self-Service Access? field should be checked (✓).</td></tr>
</table>

continued on next page

Solutions in Maximo continued

Exercise: Activate a Solution

continued

Step	Action
5	Change the status of this record to **ACTIVE**. Result: Your new solution is now active and available to users of the Maximo self-service functionality.
6	**Save** the record and close the **Solutions** application by returning to the Maximo **Start Center**.

The Search Solutions Application

The Search Solutions application contains a single table window, which displays a list of commonly asked questions or common problems and their solutions.

The Search Solutions application provides an easy way to search for answers that will help you. You can select and view details of any solution and its related attachments, such as documents or Web pages.

After viewing a solution, you can:

- indicate that the solution helped you, or
- create a service request, or
- search again.

Best Practice: You should encourage users to search for potential solutions before submitting a service request.

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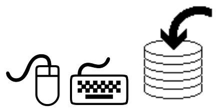
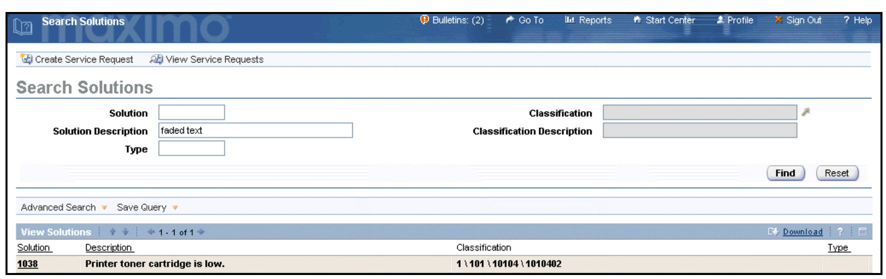
Solutions in Maximo continued

Exercise: Checking Your Work



As a user, you are encouraged to search solutions before submitting a service request. You have noticed that the printer is producing faded text.

Use the following steps to search for a solution addressing this problem, thus verifying that your new solution record is now active and available to users of the Self-Service functionality in Maximo.

Step	Action
1	Sign in to Maximo as Mark Wilson and open the **Search Solutions** application: **Go To > Self Service > Service Requests > Search Solutions** <u>Result</u>: The Search Solutions application displays a list of (available) active solutions.
2 	In the **Solution Description** field, type faded text and then click **Find**. (You could also try the word toner.) <u>Result</u>: Maximo searches on both the **Description** field and the **Symptom** field, and then displays all matching solutions. <u>Note</u>: If you are in an MRO hosted training environment, then your display will differ significantly in that there should be a larger number of solutions—at least one record for each participant. 
3	Click to select your solution. <u>Result</u>: Maximo displays your solution.
4	Review your solution.
5	After the question **Did this solution help you resolve your issue?**, click the **Yes** button. <u>Note</u>: We will address the other buttons in the next chapter. <u>Result</u>: You are returned to the Maximo Start Center.

Service Level Agreements (SLAs) in Maximo

Introduction

Use the Service Level Agreements application in Maximo to create and manage service level agreements (SLAs). A *service level agreement* is a written agreement between a service provider and customer that documents the agreed-upon levels of service. A *service* is a set of tasks provided by the service provider that fulfills one or more needs of the customer. The service level (known as a *commitment* in Maximo) describes a measurable or quantifiable aspect of that service. Maximo users can apply valid SLAs to records from other Maximo applications. In a service desk environment, a user with the proper permissions can apply an SLA from any of the Ticket or Work Order applications.

Service Level Agreements Application

You use the Service Level Agreements application and escalation functionality to manage and meet the commitments in an SLA.

A *commitment* is a specific responsibility that the service provider must meet to fulfill the service level agreement with the customer. An SLA can have one or more commitments, each having their own escalation points.

An *escalation* is a Maximo function that can automatically monitor specific processes and, upon reaching a specified pre-determined point, activate a specific action or actions and/or one or more notifications.

For example, you have an agreement with a customer with two commitments and an escalation point for each. The first commitment is to respond to all incidents related to the e-mail server within two hours. The escalation point for the response commitment is to notify a supervisor if no response has been given after one hour. The second commitment is to resolve all incidents related to the e-mail server within four hours. The escalation point for the resolution commitment checks the status of the incident at the two-hour point. If the incident is still open, Maximo reassigns ownership to the supervisor. The supervisor can take the appropriate actions in order to meet the SLA commitments.

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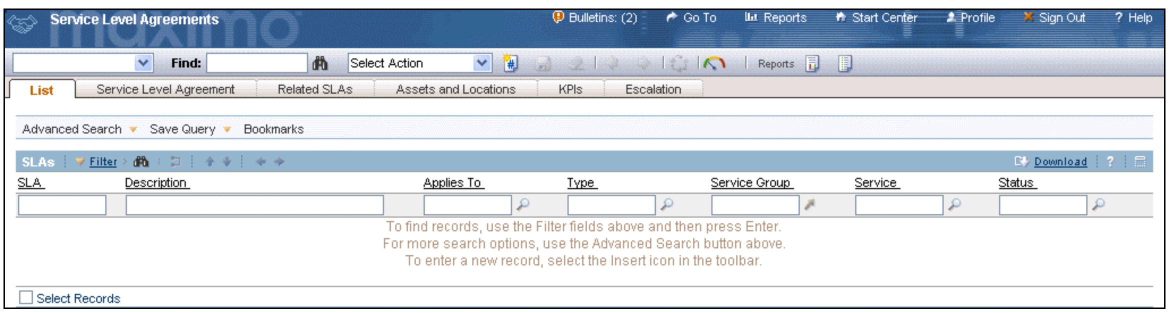
Service Level Agreements (SLAs) in Maximo continued

Service Level Agreements Application Tabs

The Service Level Agreements application contains the following tabs:

- **List** to search Maximo for SLA records.
- **Service Level Agreement** to add, view, modify, or delete service level agreements.
- **Related SLAs** to associate or view related service level agreements.
- **Assets and Locations** to associate or view assets and locations for a service level agreement.
- **KPIs** to add, view, modify, or delete key performance indicators for a service level agreement.
- **Escalation** to add, view, or modify the escalation for a service level agreement.



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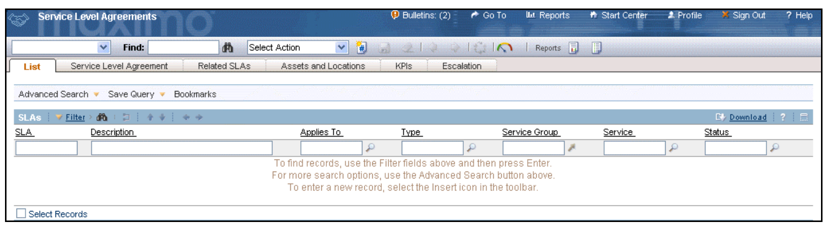
Service Level Agreements (SLAs) in Maximo continued

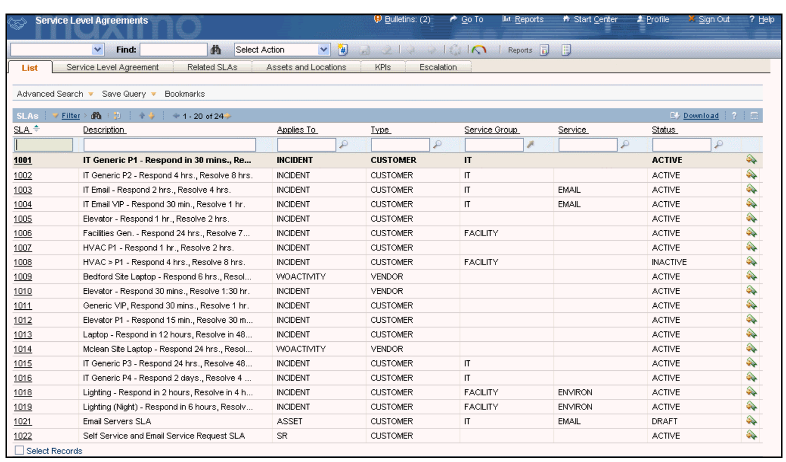
Exercise: Introduction to SLAs in Maximo

In the ITSM processes, SLAs falls under Service Management, which is covered in the later part of this course. The purpose of this section is to introduce you to SLAs in Maximo so that you will understand them as we go through this course. Use the following steps to become familiar with SLAs in Maximo.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>
Sign in to Maximo as Mark Wilson and open the SLA application:
Go To > Service Management > Service Level Agreements
<u>Result</u>: The List tab of the SLA application opens.



</td></tr>
<tr><td>2</td><td>
Press the Enter key (default query) to display a list of all SLAs in your database.
<u>Result</u>: Your display should look similar to the one below.
<u>Note</u>: The following graphic represents data based on a standard MRO training environment using the Educational Services Dept's training database. Your results may vary, depending on your training environment and the accompanying database.



</td></tr>
</table>

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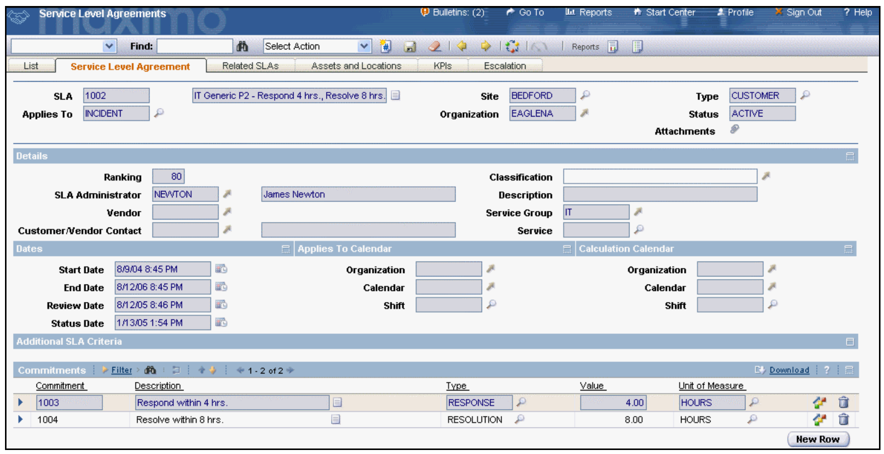
Service Level Agreements (SLAs) in Maximo continued

Exercise: Introduction to SLAs in Maximo

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Click to select SLA 1002.
<u>Result</u>: The Service Level Agreement tab displays your selected record.

</td></tr>
<tr><td>4</td><td>Review this SLA with your instructor.
Pay particular attention to the Commitments section.
Commitments are linked with Escalations.</td></tr>
<tr><td>5</td><td>Click on the Escalation tab.</td></tr>
<tr><td>6</td><td>Briefly review the Escalation tab with your instructor.
<u>Note</u>: The details for creating an SLA, including Commitments and Escalations, are covered in the last chapter of this course.</td></tr>
<tr><td>7</td><td>Close the SLA application by returning to the Maximo Start Center.</td></tr>
</table>

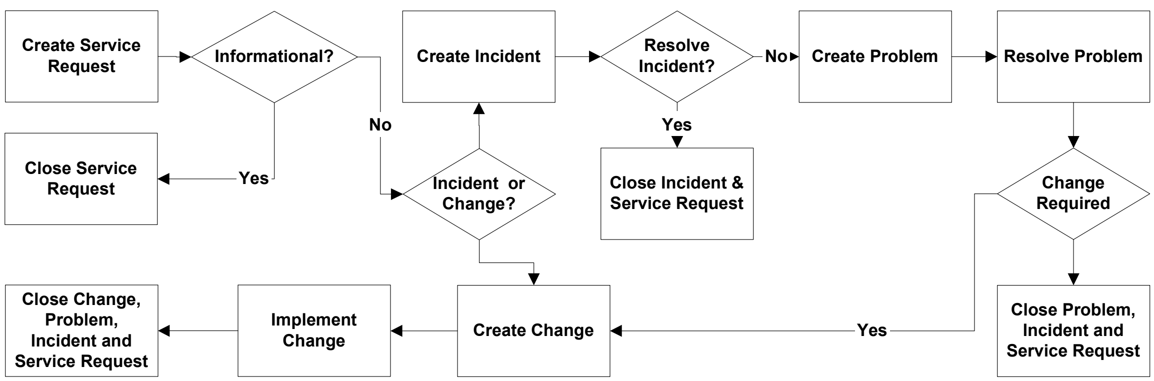
Using Workflow with Service Support

Introduction

A Workflow process can be thought of as a map that guides a record, or a user's interaction with that record, through a set of steps. You can use Workflow to create a set of paths as simple or as complex as your business process demands. Your workflow should reflect and automate your business processes as much as possible. For that reason, Workflow processes can appear quite complex, but they are actually made up of simple components.

A Typical Service Support Process Flow

The following diagram shows a typical process flow within the IT Service Support core area. You should design your workflow to match and support your organization's best practices processes.



Though it is beyond the scope of this course to design and create a workflow process, this course uses several workflow processes that, though basic, are designed to meet an ITSM process flow.

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Using Workflow with Service Support continued

Example Workflow Automation

In an automated service desk environment, you can implement a workflow process to send a solution for review, approval, and activation. You can also use workflow to automatically send a solution in response to a service request.

Note

There are many, many ways to set up workflow. Workflow should be set up for your organization so that it supports:

- your business processes,
- the tenets of ITIL (a best practice framework), and
- the smooth and efficient flow of work.

The MRO standard training environment is not designed to cover all possibilities of setting up efficient workflows, which would be nearly impossible to do. Therefore, throughout this course, the standard MRO training environment is meant to show you the manual process for transitioning work to help give you a better understanding of what is required and to open discussion for developing workflow in your work environment.

Failure Hierarchy

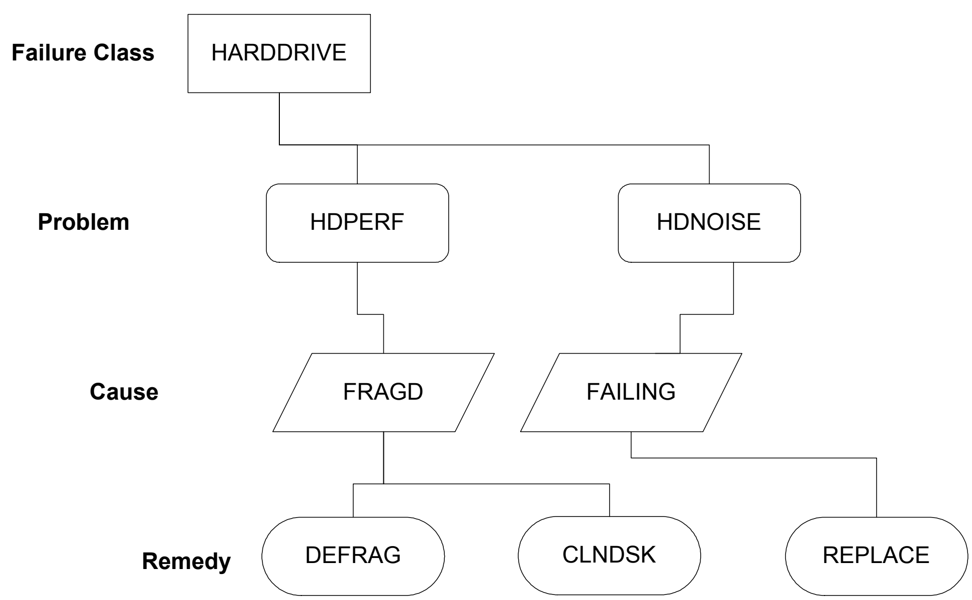
Introduction

As part of this course, we will be creating problem tickets. In an ITIL (best practices) framework, failure reporting over time accumulates a history of causes of asset failure. This history can be analyzed to assist in decision-making when it comes to assets and locations. Failure hierarchies are central to failure reporting in Maximo.

Definition

A *failure hierarchy* is a structured list of legitimate failures and solutions you have defined for your site. This allows for the reporting of failures against an asset or locations. A failure hierarchy:

- Identifies all levels of asset problems, causes, and remedies, so that a person can identify what's wrong and what to do about it.
- Provides a framework within which someone can report failures, enabling them to record and track the causes of breakdowns.



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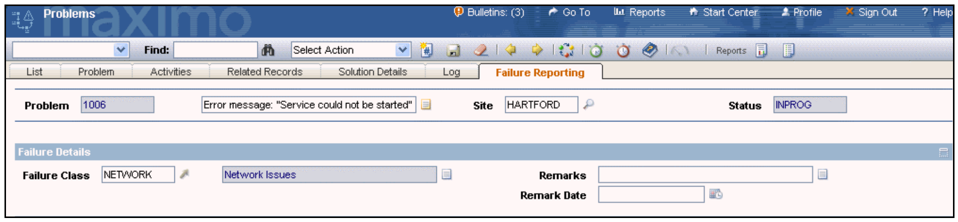
Failure Hierarchy continued

Failure Reporting in Maximo

You can report failures on the Failure Reporting tab in the Problems application.

Note: You can also report failures in other applications, which are outside the scope of this course.

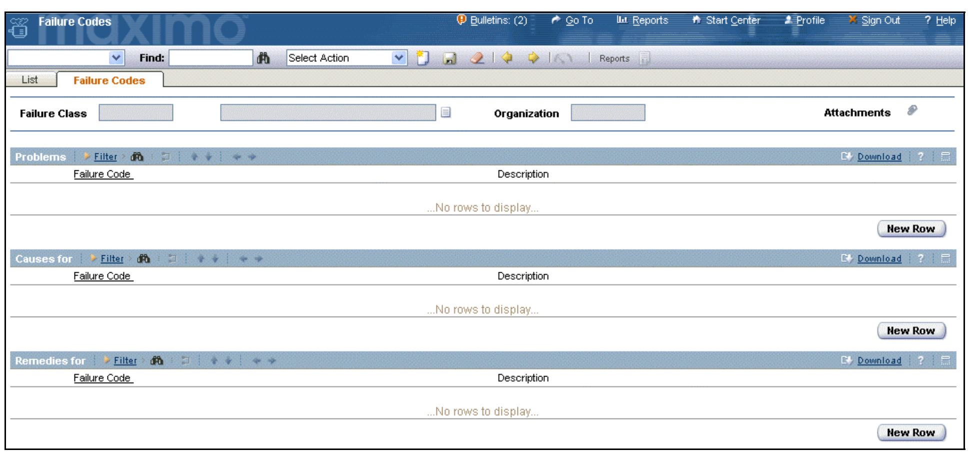


The Failure Code Application

You use the Failure Code applications to build and view failure hierarchies and enter their corresponding failure codes. The standard Maximo failure hierarchy consists of four levels:

- Failure Class
- Problem
- Cause
- Remedy

The lower-level items in the list above are "associated" with the higher-level items. Therefore, these levels must be defined in order from the top of the list to the bottom.



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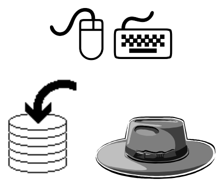
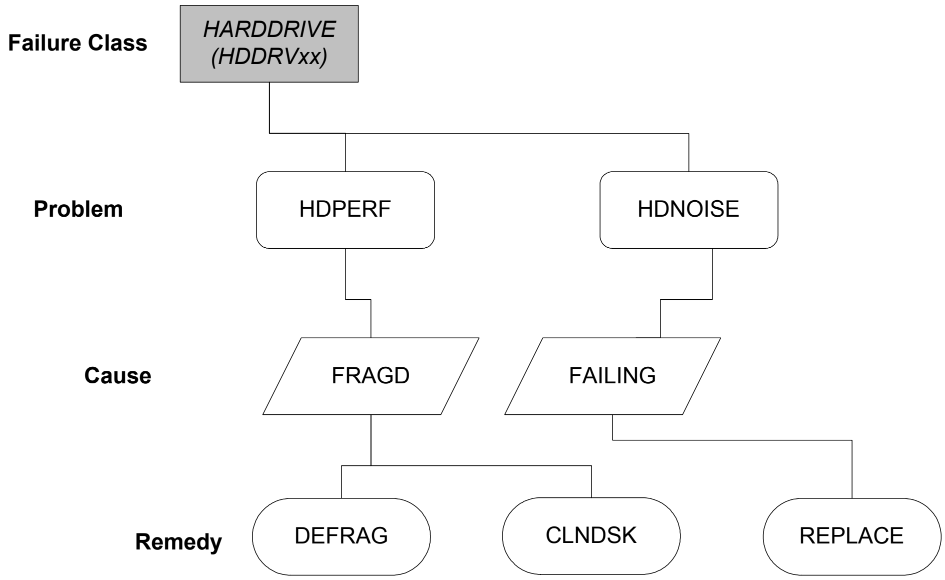
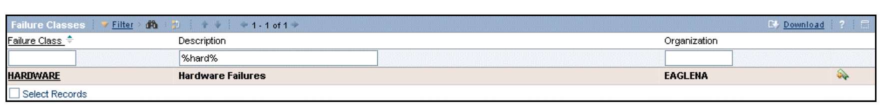
Failure Hierarchy continued

Exercise: Inserting a Failure Class Record



Use the following steps to insert a failure class record into the Maximo database.



Step	Action
1	Sign in to Maximo as Mark Wilson and open the **Failure Codes** application: **Go To > Assets > Failure Codes** <u>Result</u>: The Failure Codes application opens.
2	Before we create a new failure class, we will need to see if one exists for our scenario. In the **Description** field on the **List** tab, type %hard% and then press **Enter**. <u>Result</u>: Only one result should display (in an MRO standard training environment using the *maxdemo* training database). 

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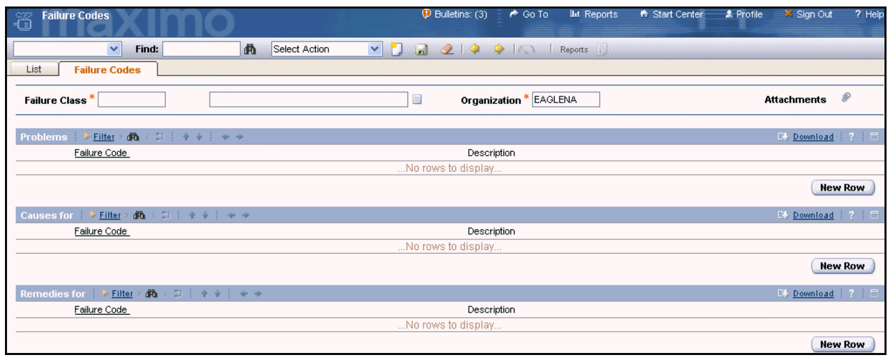
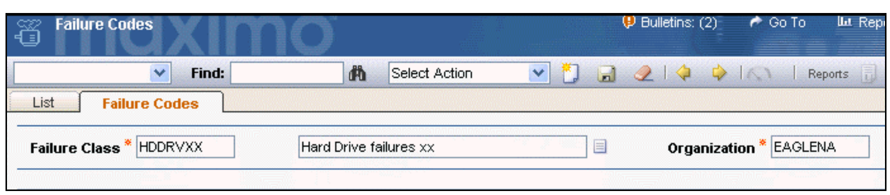
Failure Hierarchy continued

Exercise: Inserting a Failure Class Record

continued

Step	Action
3	Insert a new record by clicking **New Failure Code** . Result: A new record opens, ready for editing. 
4	On the **Failure Codes** tab, enter the following information and then **save** the record: **Field** **Value** **Failure Class** HDDRV*xx* **Description** Hard Drive failures *xx* Result: The failure class is added to the Maximo database. 

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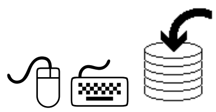
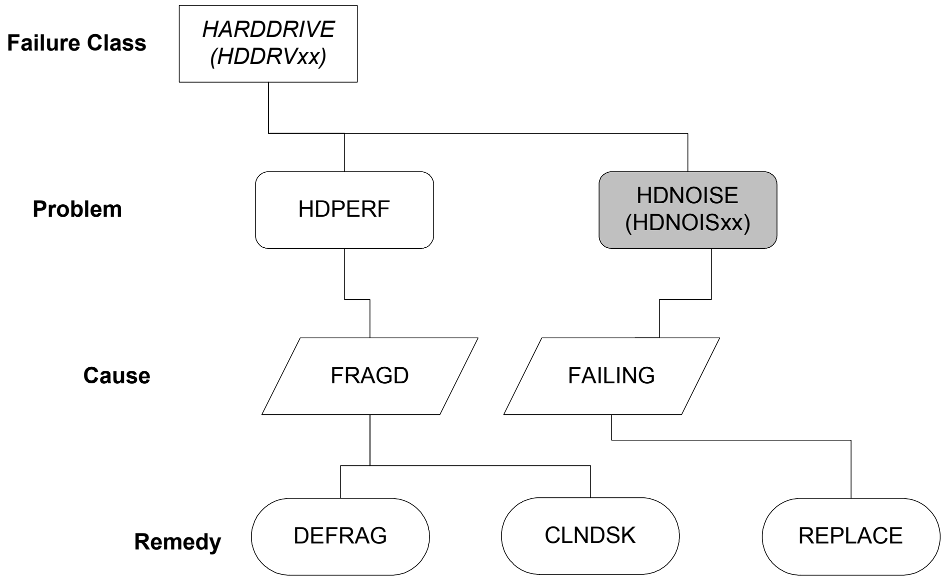
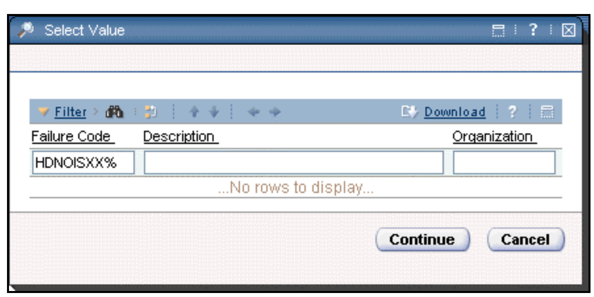
Failure Hierarchy continued

Exercise: Adding a Problem Failure Code



For this example, we will indicate that the problem for this failure class is that the hard drive is making an unusual noise.



Step	Action
1	With the record for **HDDRV*xx*** open in the **Failure Codes** tab of the **Failure Codes** application, click **New Row** in the **Problems** section. <u>Result</u>: A Problem details row opens, ready for editing.
2	Enter HDNOIS*xx* into the **Failure Code** field, then **Tab** out of the field. <u>Result</u>: When you tab out of the Failure Code field, you might see a Select Value dialog box:  If you do, just click Continue.

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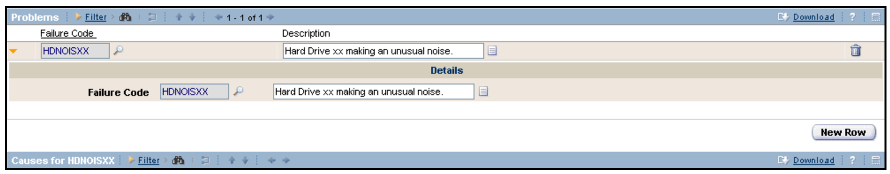
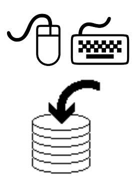
Failure Hierarchy continued

Exercise: Adding a Problem Failure Code

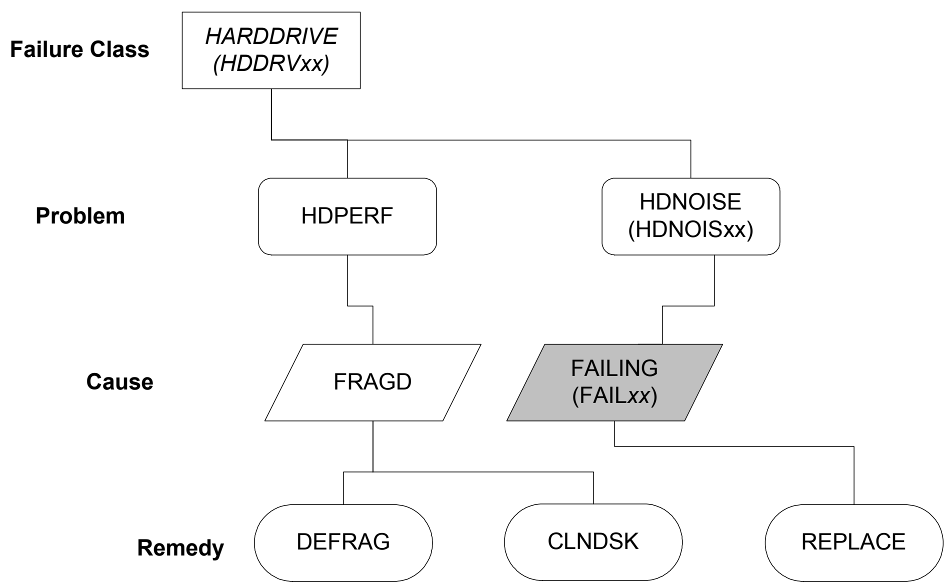
continued

Step	Action
3	Press **Tab**, and in the **Description** field enter Hard Drive making an unusual noise. **Save** the record. Result: The problem is added to the failure class.  Note: The second section now indicates that it will hold causes for the selected problem.

Exercise: Adding a Cause Failure Code



Now that we have created a code for the problem, we must create a code for the cause of the problem. In our example, we will indicate that the hard drive is failing.



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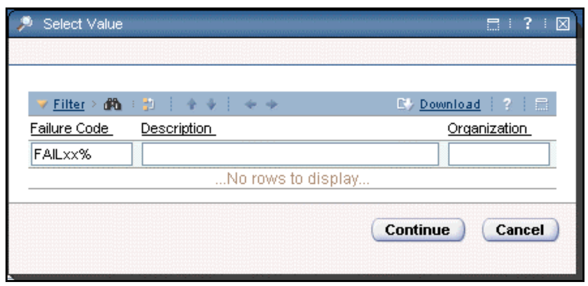
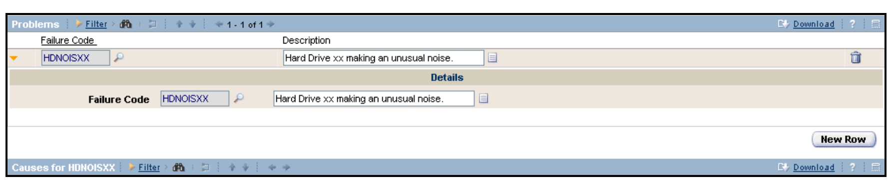
Failure Hierarchy continued

Exercise: Adding a Cause Failure Code

continued

Step	Action
1	Ensure that the **HDDRV*xx*** record is selected. With the **HDDRV*xx*** record open on the **Failure Codes** tab of the **Failure Codes** application, click **New Row** in the **Causes** section. Result: A Cause details row opens, ready for editing.
2	Enter FAIL*xx* into the **Failure Code** field, then **Tab** out of the field. Result: When you tab out of the Failure Code field, you might see a Select Value dialog box:  If you do, just click Continue.
3	Press **Tab**, and in the **Description** field enter Hard Drive is failing. **Save** the record. Result: The cause is added to the failure class.  Note: The third section now indicates that it will hold remedies for the selected cause.

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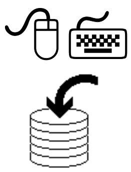
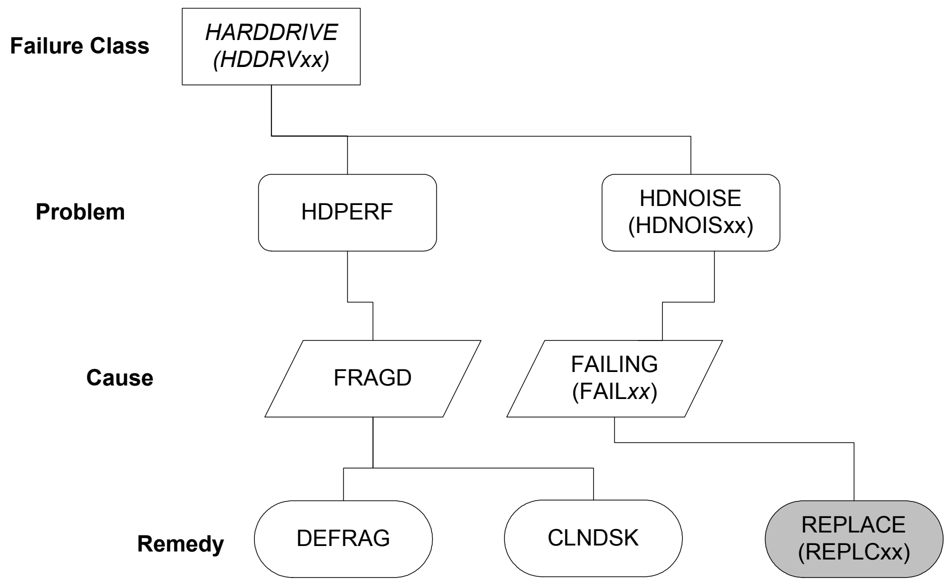
Failure Hierarchy continued

Exercise: Adding a Remedy Failure Code



The final step is to indicate the potential remedies for the cause.

In this section, we will add a remedy to replace the failing hard drive. A remedy indicates the action required to correct the identified cause of the problem.



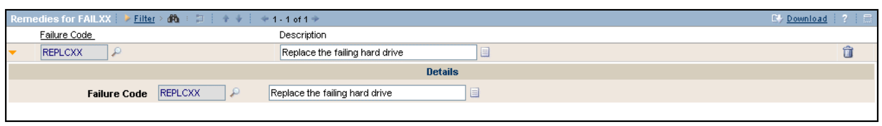
Step	Action
1	With the record for **HDDRV*xx*** open on the **Failure Codes** tab of the **Failure Codes** application, click **New Row** for the **Remedies** section. Result: A Remedies details row opens, ready for editing.

continued on next page

Failure Hierarchy continued

Exercise: Adding a Remedy Failure Code

continued

Step	Action
2	Enter REPLC*xx* into the **Remedy** field, then **Tab** out of the field. Result: When you tab out of the Remedy field, you might get a Select Value dialog box. If you do, just click Continue.
3	Press **Tab**, and then in the **Description** field enter Replace the failing hard drive. **Save** the record. Result: The remedy is added to the failure class. 
4	Sign out of Maximo.

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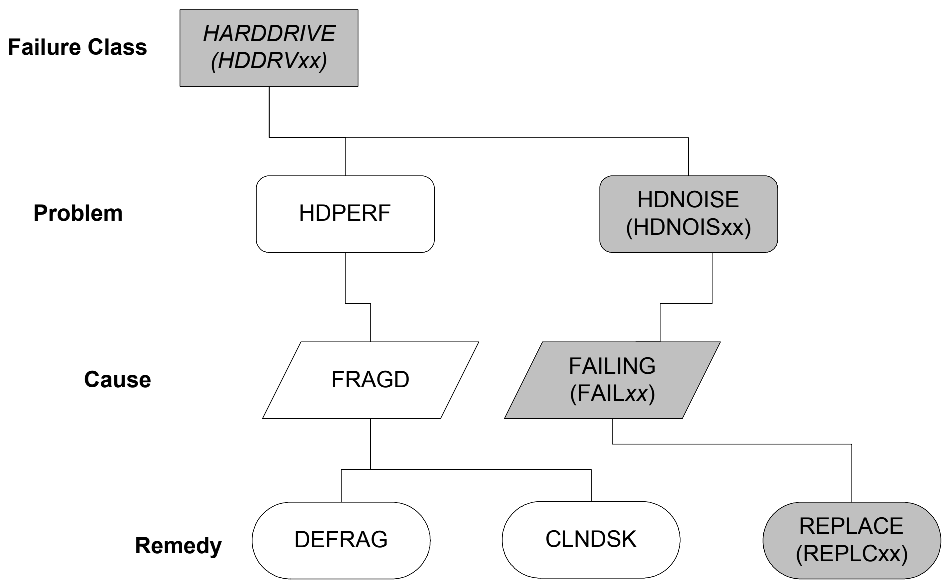
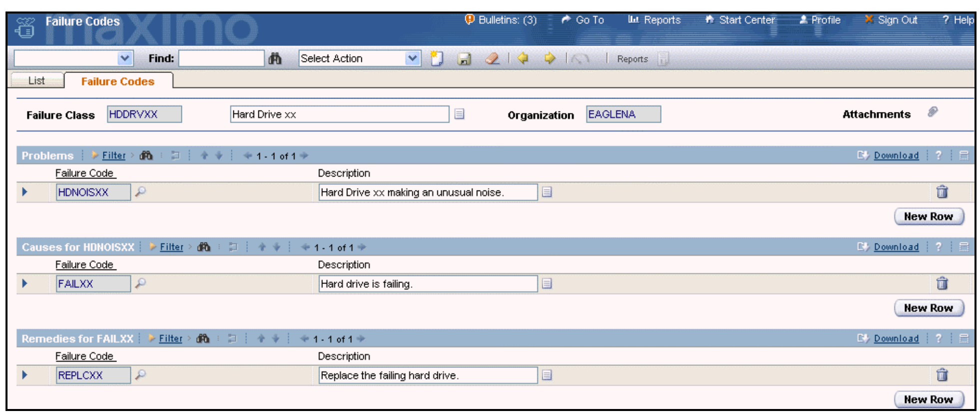
Failure Hierarchy continued

The Failure Class Completed

Though we have not completed this failure class, according to the diagram, we have completed what we need for an exercise later in this course.



In our example, the failure class should look like this:



Chapter Summary

Overview: Setting Up Maximo for ITSM

Here are some of the functionality and applications you use in Maximo to support efficiency and ITIL best practices:

- Templates
- Solutions/Solutions Knowledge Base
- Service Level Agreements
- Workflow

In this chapter, you set up some simple data and you learned how Maximo supports some of the ITSM processes.

Communication Templates in Maximo

You use the Communication Templates application to create and manage generic communication templates that Maximo users can leverage to standardize frequently used e-mail communications (also known as *notifications*).

Ticket Templates in Maximo

You use the Ticket Templates application to create and manage generic ticket templates that service desk environments can leverage to standardize common or high-volume service requests, incidents, or problems. You can save time by applying a predefined template to a ticket record, letting Maximo populate values from the template into fields on the ticket, which can be overwritten if needed.

Solutions in Maximo

A *solution* is a predefined response to a commonly asked question or problem.

You use the Solutions application in Maximo to create and manage solution records in a service desk environment. It is an administrative application and is separate from the Search Solutions application that customers use to find solutions.

You can allow customers to search and view solutions from the Maximo simplified knowledge base, called Search Solutions, to resolve their problems on their own.

Service desk agents can also search the Solutions database to find resolutions.

continued on next page

Chapter Summary continued

Service Level Agreements (SLAs) in Maximo

You can use the Service Level Agreements application in Maximo to create and manage service level agreements (SLAs). A *service level agreement* is a written agreement between a service provider and customer that documents the agreed-upon levels of service. A *service* is a set of tasks provided by the service provider that fulfills one or more needs of the customer. The service level (known as a *commitment* in Maximo) describes a measurable or quantifiable aspect of that service. Maximo users can apply valid SLAs to records from other Maximo applications. In a service desk environment, a user with the proper permissions can apply an SLA from any of the Ticket or Work Order applications.

Using Workflow with Service Support

A Workflow process can be thought of as a map that guides a record, or a user's interaction with that record, through a set of steps. You can use Workflow to create a set of paths as simple or as complex as your business process demands. Your workflow should reflect and automate your business processes as much as possible. For that reason, Workflow processes can appear quite complex, but they are actually made up of simple components.

Failure Hierarchy

In an ITIL (best practices) framework, failure reporting over time accumulates a history of causes of asset failure. This history can be analyzed to assist in decision-making when it comes to assets and locations. Failure hierarchies are central to failure reporting in Maximo.

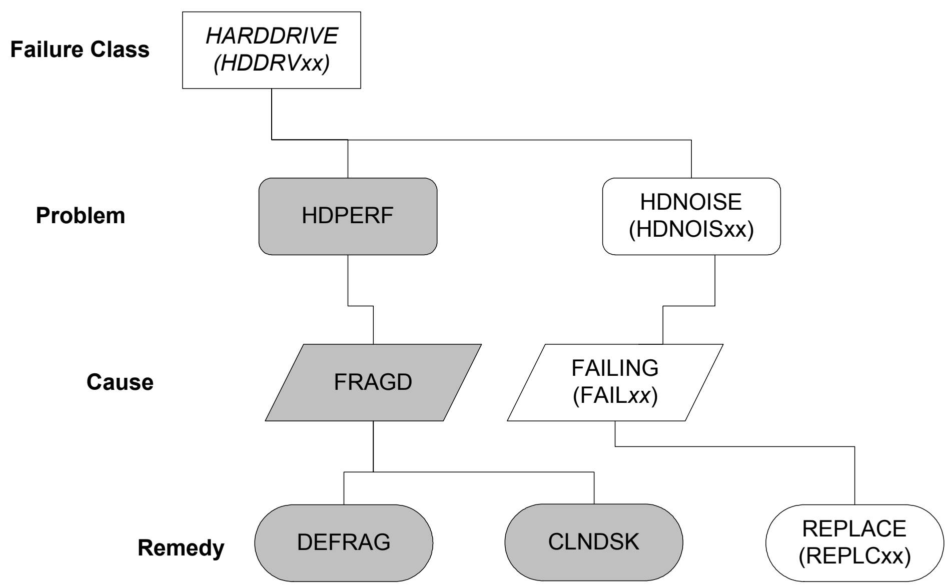
Workshop

[Optional] Exercise: Completing Our Failure Hierarchy Example

This is an optional exercise. The data is not required for exercises in later chapters.

Using the information that you have learned in this chapter, complete the failure hierarchy example, as depicted in the following diagram.

Hint: The failure class already exists. Start by adding a new row for an additional problem code.



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Workshop continued

[Optional] Exercise: Modifying the Start Center

This is an optional exercise. The data is not required for exercises in later chapters.

Although Bill Sinclair, as a Tier 1 service desk agent, has a Work View Result set on his Start Center, he decides to add some links to access those applications he uses quite frequently, such as the Incidents application and the Service Requests application.

Use the following steps to add a new portlet to the Start Center.

Step	Action
1	Sign in to Maximo as Bill Sinclair (sinclair/sinclair). Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	Click the **Change Content/Layout** link. Result: The Layout and Configuration page opens.
3	Click the **Select Content** button for the **Left Column** section. Result: The Available Portlets dialog box opens.
4	Click to select **Favorite Applications**, and then click **OK**. Result: The Available Portlets dialog box closes, and you are returned to the Layout and Configuration page.
5	Reorder the applications so that **Favorite Applications** is second and **KPI Graph** is third.
6	Click **Finished**. Result: You are returned to the Start Center with the Favorite Applications portlet listed second.

continued on next page

Workshop continued

[Optional] Exercise: Configuring the Favorite Applications Portlet

Now that we have added the Favorite Applications portlet to the Start Center, you must configure the portlet.

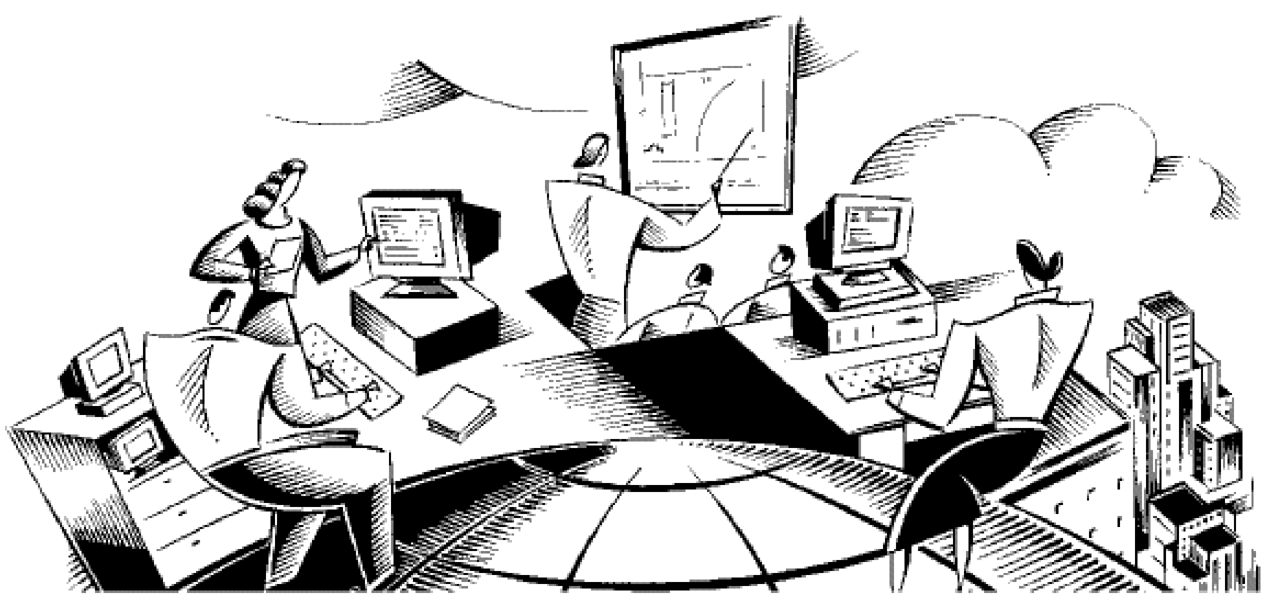
Use the following steps.

Step	Action
1	For the **Favorite Applications** portlet, click the **Edit Portlet** icon. Result: The Favorite Applications Setup page opens.
2	Click **Select Applications**. Result: The Select Applications dialog box opens.
3	Find and select the **Incidents** application and the **Service Requests** application, and click **OK**. Result: The Select Applications dialog box closes.
4	Choose any order that you want.
5	Click **Finished**. Result: The selected applications are available in the Favorite Applications portlet.

NOTES:

NOTES:

Chapter 4: The Service Desk



In This Chapter

This chapter contains the following topics:

Chapter Overview

Introduction

This chapter introduces the Service Desk functionality in Maximo. The Service Desk, while a function, is owned by the Incident Management process and is the central point of contact for users.

Chapter Focus

The focus of this chapter is twofold:

- From the user's perspective, this chapter focuses on how to use the Service Desk within Maximo.
- From within the ITIL framework, this chapter focuses how the Service Desk supports the Incident Management process.

Learning Objectives

When you have completed this chapter, you should be able to:

- Describe how the Service Desk supports the Incident Management process,
- Create a Bulletin Board message for users,
- Create a Bulletin Board message for a specific target audience,
- Search the Solutions Knowledge Base in Maximo,
- Create and submit a service request via the Service Requests application,
- Create an SR via receiving a simulated telephone call,
- Submit a service request via e-mail, and
- View existing service requests.

The Service Desk: An Overview

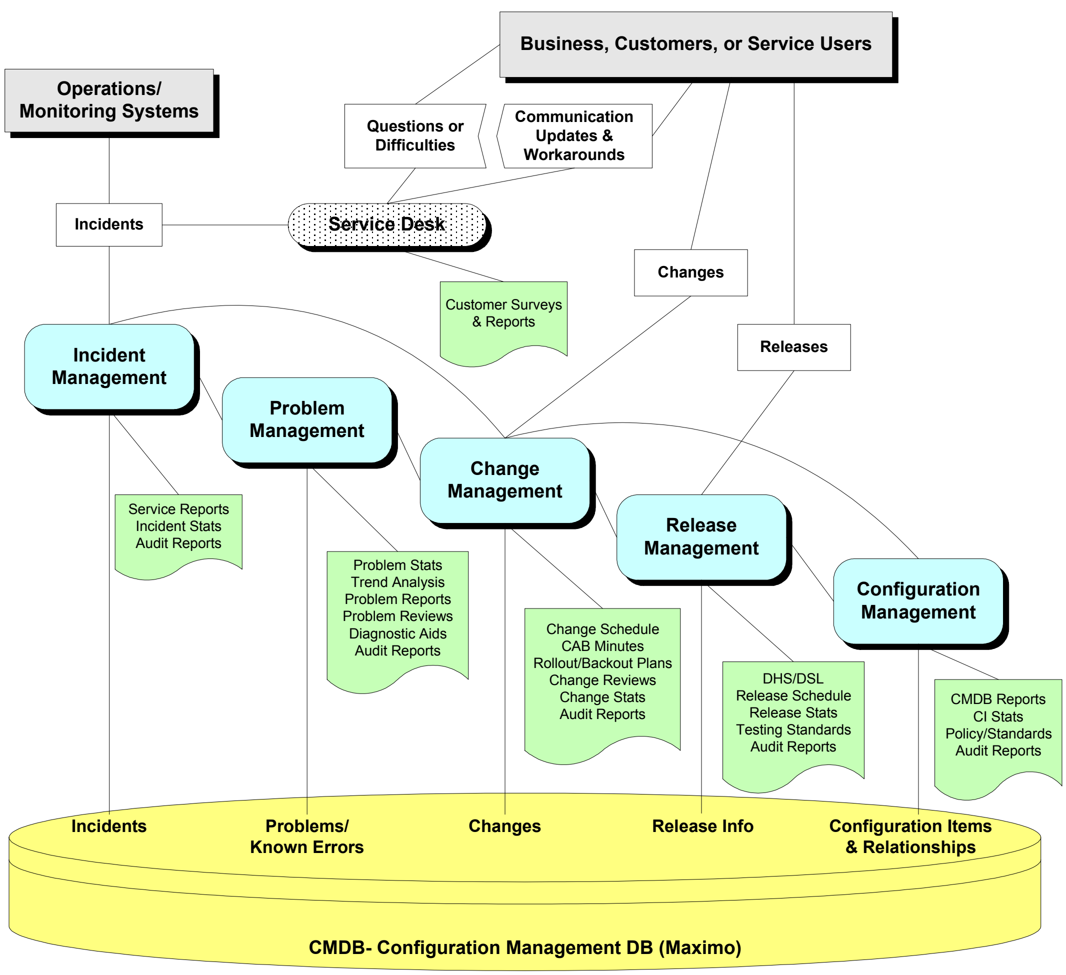
Introduction

Recall that the goal of the service desk is to act as the central point of contact between the user and IT Service Management.

The Incident Management process in an ITIL framework owns the service desk functionality.

You Are Here

Recall this diagram depicting the various IT Service Management processes. Notice the dotted "Service Desk" area. Throughout this chapter, we will be discussing the Service Desk functionality in Maximo.



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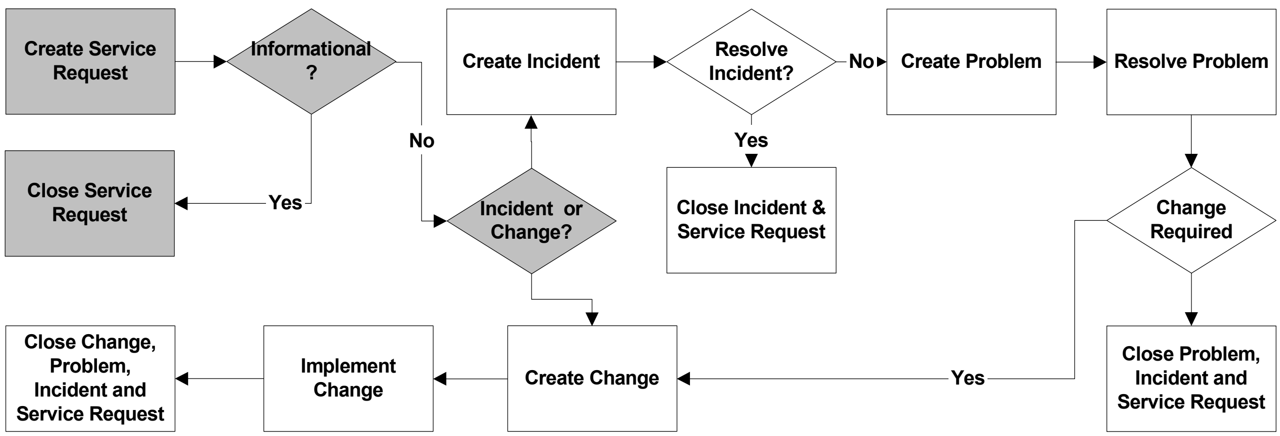
The Service Desk: An Overview continued

A Typical Service Desk Process Flow

Recall from the previous chapter that each organization's processes for the service desk will differ. Moreover, recall that you can use Workflow to support your organization's processes. In this course, we will follow the following typical process flow for a service desk.

The highlighted blocks in this diagram depict the parts that we will be discussing throughout this chapter.



Why a Service Desk

The service desk, unlike the ITIL processes, is a function essential to effective IT Service Management. It is the principal operational interface between IT and their users. The principal reasons for an organization to invest in a service desk are to:

- Provide a single point of contact for users;
- Deliver the high-quality support critical for achieving business goals;
- Help identify and lower the cost of ownership for IT services as a whole;
- Support changes across business, technology, and process boundaries;
- Aid user retention and satisfaction; and
- Assist in identification of business opportunities.

continued on next page

The Service Desk: An Overview continued

Responsibilities

Most of the responsibilities carried out by the service desk fall under the responsibility of one of the IT Service Management processes. The actual role and responsibilities of the service desk will depend on the procedures that your organization has put in place. Some of the tasks commonly assigned to the service desk are as follows:

- Provide a self-service tool to empower end users to resolve their issues.
- Receive and record all calls from users.
- Deal directly with simple requests and complaints.
- Provide initial assessment of all incidents.
- Make first attempt at incident resolution and/or refer to second-level line support, based on agreed-upon service levels.
- Monitor and escalate all incidents according to agreed-upon service levels.
- Keep users informed on status and progress.
- Produce management reports.

Summary

The goal of the service desk is to act as the central point of contact between the user and IT Service Management.

Throughout this course, you will learn how Maximo supports the responsibilities listed above.

The Service Desk Function in Maximo

Applications Supporting the Service Desk

From a user's perspective, Maximo provides the following applications to support a service desk:

- Bulletin Board
- Search Solutions
- View Service Requests
- Create Service Requests

The Bulletin Board

Bulletin Board messages can be viewed from the Start Center as well as from any Maximo application.

Any user granted access to the Bulletin Board application could create messages. You can also use the Bulletin Board application to broadcast information throughout the enterprise.

By creating and posting messages on the Bulletin Board, you can minimize the creation and duplication of tickets. Bulletin Board messages can be targeted to a specific audience (based on organization, site, or person group). If an audience is not specified, then any user who signs in to Maximo can view the Bulletin Board messages.

You can specify the date and time you want the message to appear on the Bulletin Board. You can also define a date and time when you want the message to be automatically removed from the Bulletin Board.

The Solutions Knowledge Base

A Solutions Database/Repository (Knowledge Base in Maximo) is one key component to having a good service desk. Maximo provides the capability for a Solutions Knowledge Base. A *solution* is a predefined response to a commonly asked question or problem. A solution record defines a symptom, a cause, and a resolution.

Through the Maximo Solution Knowledge Base, your customers can search and view solutions from within Maximo to resolve their problems on their own. Service desk agents, using Maximo, can also associate a solution record to a service request, incident, or problem ticket.

The Maximo Solutions application follows the ITIL framework of best practices by allowing service desk personnel to focus on other issues, thereby optimizing their performance and improving responses associated with service level commitments.

continued on next page

The Service Desk Function in Maximo continued

Creating Service Requests

As a user, you use the Create Service Request application to request a repair or change to your service. You might request the service for yourself or on behalf of another party. In general, you should search the existing library of solutions before submitting a service request.

You can attach screen shots, documents, or Web pages to the request. After creating the service request, you can review the details, submit another service request, or return to your start center.

Maximo routes your service request to a service desk agent. The agent takes appropriate action and can communicate ongoing activities or a resolution to you.

The Create Service Request application works in combination with the View Service Requests and the Search Solutions applications. With a single login, you can easily search for potential solutions to your issue, create a service request if necessary, and view details, including communications, for all requests you have made.

Viewing Service Requests

The View Service Requests application contains a single table window, which displays the service requests that you have created.

As a user, you can view and print details for a service request. You can add or view attachments, such as documents or Web pages. You can also view and update the Service Request log, which contains communications to and from the service desk agent who is handling this request.

Above the View Service Requests table window are fields by which you can search for your service request.

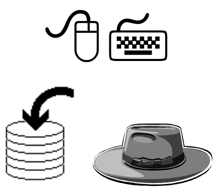
The Bulletin Board Application

Introduction

By creating and posting messages on the Bulletin Board, you can minimize the creation and duplication of tickets. Bulletin Board messages can be targeted to a specific audience (based on organization, site, or person group). If an audience is not specified, then any user who signs in to Maximo can view the Bulletin Board messages.

You can specify the date and time you want the message to appear on the Bulletin Board. You can also define a date and time when you want the message to be automatically removed from the Bulletin Board.

Exercise: Inserting a New Bulletin



Scenario: As a service desk agent, you have been notified that Maximo will be shut down for a short time for an update. To prevent calls to your service desk, you use the Bulletin Board application to broadcast a message.

Use the following steps to insert a new Bulletin Board message.

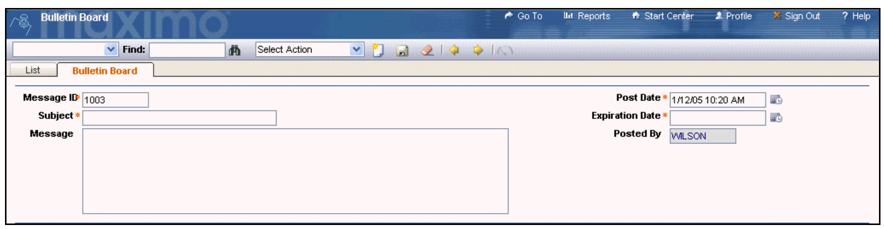
Step	Action
1	Sign in to Maximo as System Administrator Mark Wilson. **User name** wilson **Password** wilson Note: Remember that user names and passwords are case-sensitive. Result: Maximo displays the Start Center assigned to Mark Wilson.
2	Open the **Bulletin Board** application. Hint: The Bulletin Board application is in the Administration module. Result: The Bulletin Board application opens.

continued on next page

The Bulletin Board Application continued

Exercise: Inserting a New Bulletin

continued

Step	Action
3	Click the **New Message** icon  to insert a new Bulletin Board record. Result: The Bulletin Board application displays a blank record, ready for editing.  Write your message # here: ______________________.
4	Enter the following information: **Field** — **Value** **Subject** — Maximo Shutdown *xx* **Message** — An update to Maximo is necessary. Maximo will be unavailable tomorrow (*insert day/date*) from 12 noon until 1 pm. Please schedule accordingly. **Expiration Date** — (*Two days from today*)

continued on next page

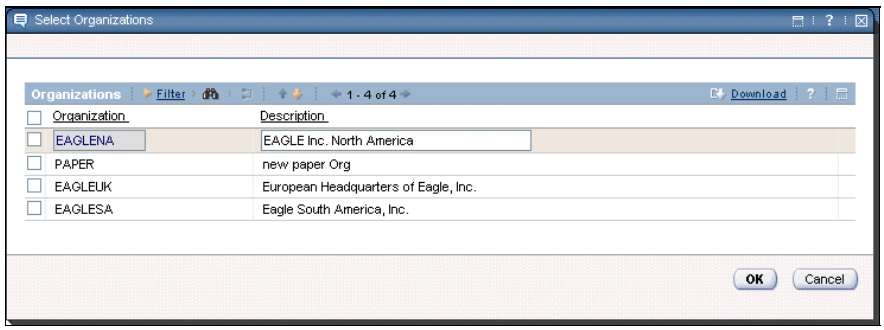
The Bulletin Board Application continued

Exercise: Inserting a New Bulletin

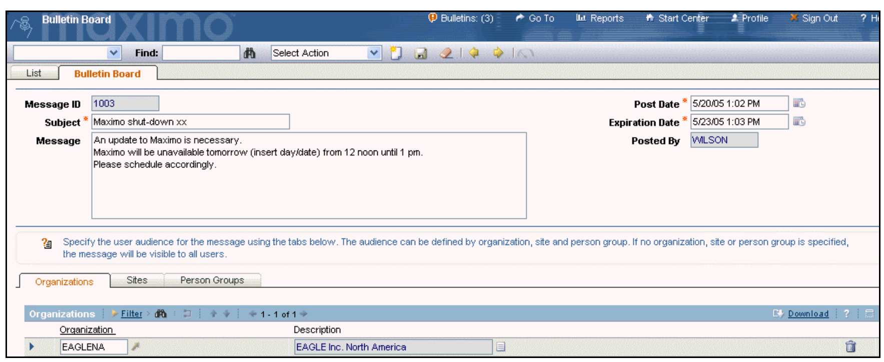
continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Click the Select Organizations button.

<u>Result</u>: The Select Organizations dialog box opens.


</td></tr>
<tr><td>6</td><td>Click to select EAGLENA, and then click OK.

<u>Result</u>: EAGLENA is now selected to receive this bulletin.


</td></tr>
<tr><td>7</td><td>Save the new record.</td></tr>
</table>

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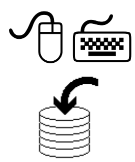
The Bulletin Board Application continued

Exercise: Inserting a Bulletin for a Specific Recipient



Scenario: As a service desk manager, you want to let Tier 1 service desk agents know that there is a solution available for symptoms regarding the *printing of faded text*.

Use the following steps to insert a new Bulletin Board message targeted to Tier 1 service desk agents.

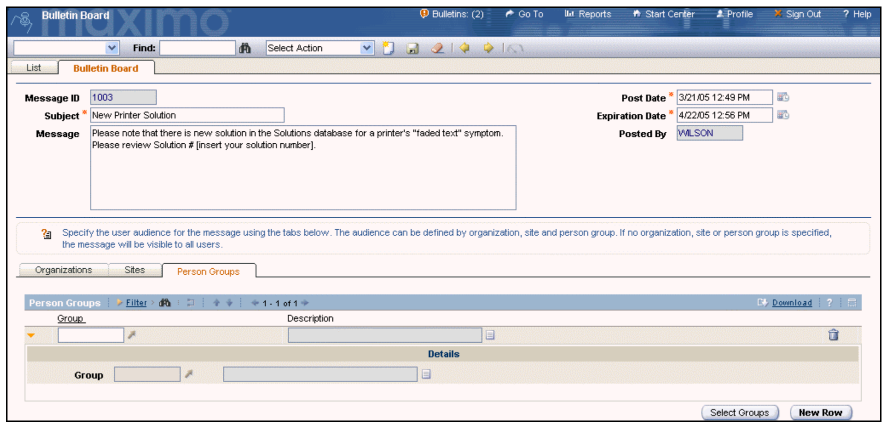
Step	Action
1	Sign in to Maximo as Mark Wilson (wilson, wilson) and open the **Bulletin Board** application. Result: The Bulletin Board application opens.
2	Click the **New Message** icon  to insert a new Bulletin Board record. Result: The Bulletin Board application displays a blank record, ready for editing (not shown). Write your message # here: ____________________.
3	Enter the following information: **Field** — **Value** **Subject** — New Printer Solution *xx* **Message** — Please note that there is a new solution in the Solutions database for a printer's "faded text" symptom. Please review Solution # [*insert your solution number*]. **Expiration Date** — [*One month from today*]
4	**Save** the new record.

continued on next page

The Bulletin Board Application continued

Exercise: Inserting a Bulletin for a Specific Recipient

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Click the Person Groups tab, and then click New Row.
Result: A new row opens for editing.

</td></tr>
</table>

continued on next page

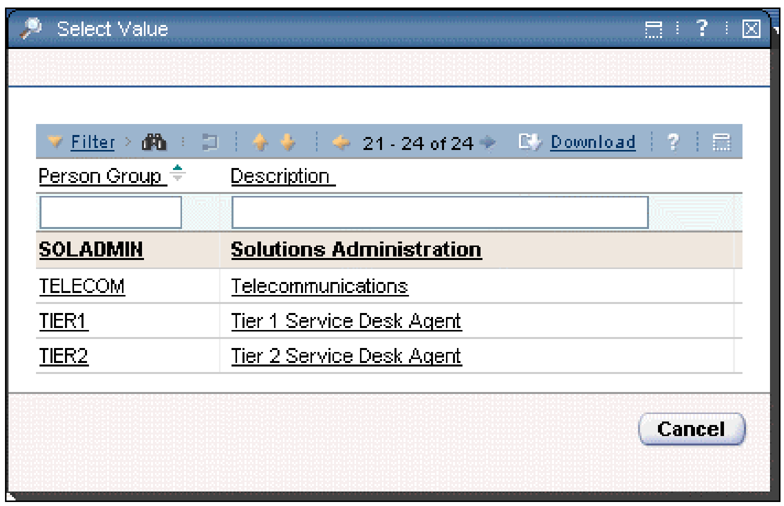
The Bulletin Board Application continued

Exercise: Inserting a Bulletin for a Specific Recipient

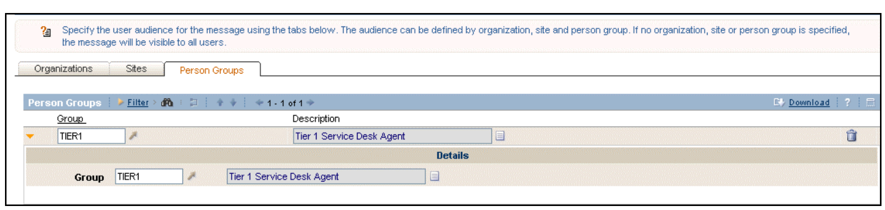
continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>In the Group field, click the Detail Menu icon, and choose Select Value from the menu.

<u>Result</u>: The Select Value dialog box opens.


</td></tr>
<tr><td>7</td><td>Find and select the TIER1 Person Group.

<u>Result</u>: TIER1 is selected as the Person Groups recipient.

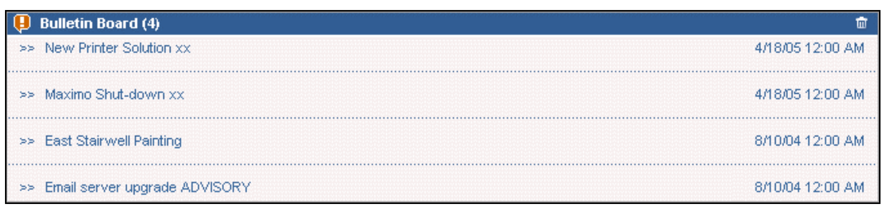

</td></tr>
<tr><td>8</td><td>Save your record.</td></tr>
<tr><td>9</td><td>Sign out of Maximo.</td></tr>
</table>

continued on next page

The Bulletin Board Application continued

Exercise: Checking Your Work

Use the following steps to check your work.

Step	Action
1	Open Maximo as a Tier 1 service desk agent by signing in to Maximo as one of the following users: **<u>User</u>** **<u>Password</u>** sinclair sinclair reid reid motika motika murthy murthy <u>Result</u>: Your bulletin board should contain at least your new message for the TIER1 person group.  <u>Note</u>: If you are in an MRO hosted training environment, there will be several of these same messages, one for each participant.
2	Click on your **New Printer Solution** Bulletin Board message. <u>Result</u>: Maximo displays the details for your Bulletin Board message.
3	**Sign out** of Maximo.

The Search Solutions Application

Introduction

In the previous chapter, we took a quick look at both the Solutions and the Search Solutions applications. Recall that a solution is a predefined response to a commonly asked question or problem.

You use the Solutions application in Maximo to create and manage solution records in a service desk environment. It is an administrative application and is separate from the Search Solutions application that customers use to find solutions.

You use the Search Solutions application to allow customers to search and view solutions from the Maximo simplified knowledge base to resolve their problems on their own.

The Search Solutions Application

The Search Solutions application contains a single table window, which displays a list of commonly asked questions or common problems and their solutions.

Search for potential solutions before submitting a service request. The Search Solutions application provides an easy way to search for answers that will help you. You can select and view details of any solution and its related attachments, such as documents or Web pages.

After viewing a solution, you can:

- indicate that the solution helped you, or
- create a service request, or
- search again.

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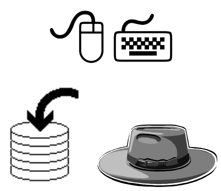
The Search Solutions Application continued

Exercise: Finding the Correct Solution

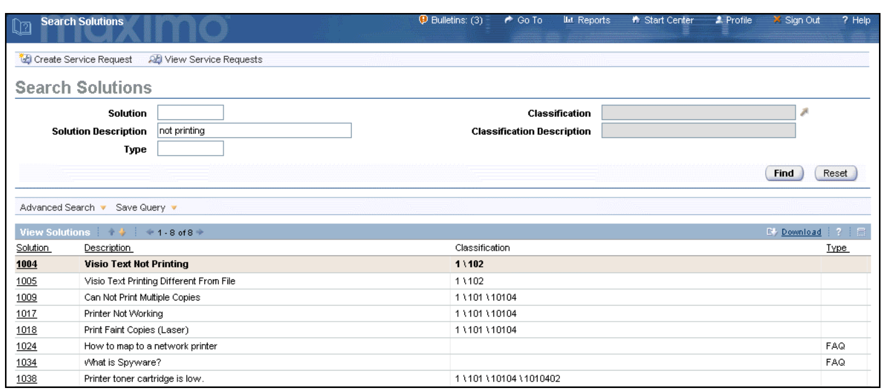


In the previous chapter, we used the Search Solutions application to look at (and verify) a solution that solved a specific problem. In this exercise, we will look at a solution that does not address our problem, and then we will continue to search for a solution that might address the problem.

Scenario: As a user, Tony Redding, you are working in Microsoft Visio. You try to print a drawing that you are working on. It does not print. You use Search Solutions before submitting a service request, as required by your business as a best practice.

Use the following steps.

Step	Action
1	Sign in to Maximo as the user Tony Redding: **User name** redding **Password** redding Result: Maximo displays the Start Center assigned to Tony Redding.
2	Open the **Search Solutions** application. Hint: The Search Solutions application is available to Tony Redding through the Service Desk Actions portlet. Result: The Search Solutions application displays a list of (available) active solutions.
3	Enter not printing in the **Solution Description** field, then click **Find**. Result: Maximo displays all solutions with this text.



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The Search Solutions Application continued

Exercise: Finding the Correct Solution

continued

Step	Action
4	Because you were working in Microsoft Visio, you decide that Solution # 1004 (Visio Text Not Printing) might solve your problem. Click to select solution # **1004**. <u>Result</u>: Maximo displays solution # 1004.
5	After reviewing this solution, you determine that it does not address your problem. After the question **Did this solution help you resolve your issue?**, click the **No – Return To Solution Search** button. <u>Result</u>: The Search Solutions application redisplays your previous search results.
6	After reading through the previous solution, you realize that you are not able to print more than just Microsoft Visio documents. You decide to try Solution # 1017 (Printer Not Working). Click to select solution # **1017**. <u>Result</u>: Maximo displays solution # 1017.
7	After reading through this solution, you decide that it does address your problem. You follow the resolution instructions, and it fixes your problem. After the question **Did this solution help you resolve your issue?**, click **Yes**. <u>Result</u>: You are returned to the Maximo Start Center.

Creating a Service Request

Introduction

Recall that the service desk is the central point of contact for users. Through the service desk, users submit service requests (SRs). Maximo provides several ways for users to submit SRs. This section shows you how to submit an SR through the Maximo Create Service Request application.

Service Request (SR) Definition

An SR is usually, but not always, a request for change, generally both common and straightforward, to be made to a service.

An SR is characterized by the fact that the change can be made under strict, well-defined procedural control and is therefore virtually risk free.

Note: In Maximo, an SR is usually the starting point for an interaction between the service desk and an end user.

The Create Service Request Application

You use the Create Service Request application to request a repair or change to your service. You might request the service for yourself or on behalf of another party. In general, you should search the existing library of solutions before submitting a service request.

You can attach documents or Web pages to the request. After creating the service request, you can review the details, submit another service request, or return to your Start Center.

Maximo routes your service request to a service desk agent. The agent takes appropriate action and can communicate ongoing activities or a resolution to you.

The Create Service Request application works in combination with the View Service Requests and the Search Solutions applications. With a single login, you can easily search for potential solutions to your issue, create a service request if necessary, and view details, including communications, for all requests you have made.

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Creating a Service Request continued

Exercise: Create an SR

Scenario: A user, Tony Redding, cannot archive his e-mail. He searches for a solution and does not find one that addresses his problem. He submits an SR.

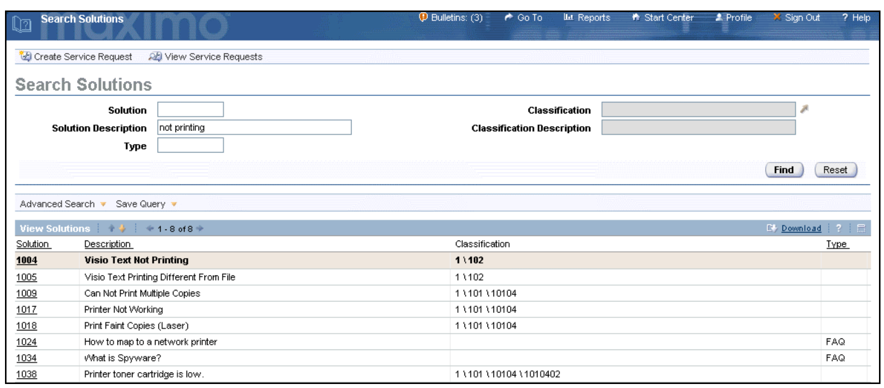
Use the following steps.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Sign in to Maximo as the user Tony Redding (redding/redding).

Result: Maximo displays the Start Center assigned to Tony Redding.</td></tr>
<tr><td>2</td><td>In the Service Desk Actions portlet, click Search Solutions.

Best Practice: It is a best practice to encourage all users to first search solutions before submitting an SR. Your organization might have enforced this practice by removing Create Service Request from the menu, because you can submit an SR from the Search Solutions application.

Result: The Search Solutions application opens.


</td></tr>
</table>

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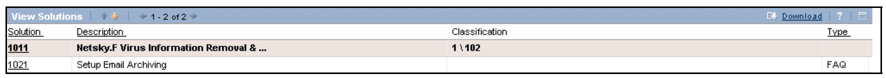
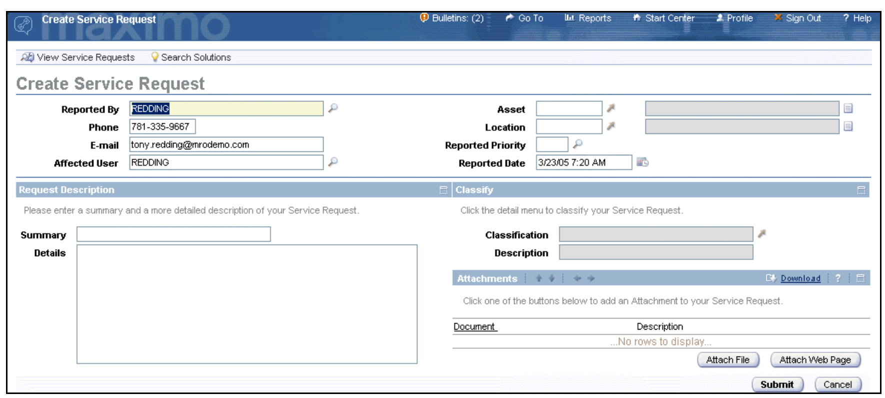
Creating a Service Request continued

Exercise: Create an SR continued

Step	Action
3	Note: In the previous chapter, you learned how to search for a solution. Perform a search on the word archive in the **Solution Description** field. Result: Your search results should be similar to the following. 
4	Click to select **Solution 1021: Setup Email Archiving**. Result: Maximo displays the selected solution.
5	This solution does not solve Tony Redding's problem. He already has e-mail set up—he just cannot archive. After the question **Did this solution help you resolve your issue?**, click **No – Create a Service Request**. Result: The Create Service Request application opens with a new SR ready for editing and pre-populated with the signed-in user's information. 

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Creating a Service Request continued

Exercise: Create an SR

continued

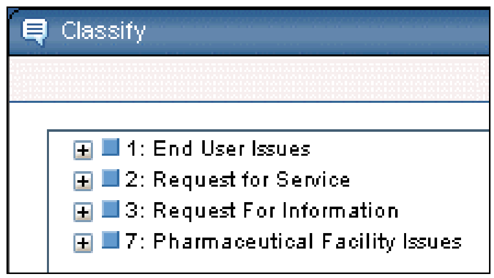
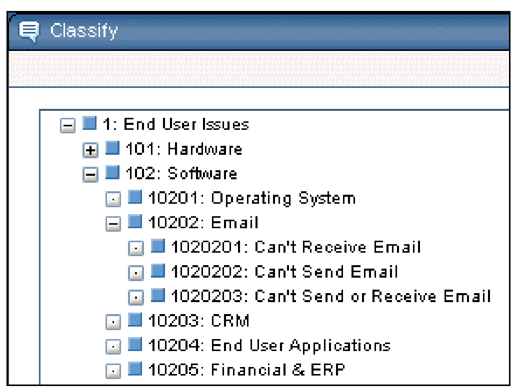
Step	Action
6	Enter the following information: **Field** / **Value** **Reported Priority**: 3 (medium) **Summary**: I cannot archive my e-mail *xx*. **Details**: I cannot archive my e-mail. Last month, I was able to archive my e-mail. Today I am reaching my limit and need to archive. I tried and nothing happens. I did search solutions, first, and tried # 1021. My e-mail setup appears to be correct. Note: Normally, this problem could probably have been identified as a priority 4 Low; however; because this user is reaching his e-mail limits, this situation warrants a higher priority. If the user's limits were already exceeded, then this might warrant an even higher priority. Best Practices: • Users should be encouraged to list any actions leading up to the listed problem, if applicable. • Users should be encouraged to identify any corrective actions (including solutions) that they might have tried. • Users should be encouraged to select the appropriate priority for the given situation. • Users should be encouraged to classify their SR.

continued on next page

Creating a Service Request continued

Exercise: Create an SR

continued

Step	Action
7	Click the **Detail Menu** icon for the **Classification** field, and choose **Classify**. Result: Maximo displays the Classify dialog box. 
8	Click on the + (plus) sign to expand **1: End User Issues**. Click on the + (plus) sign to expand **102: Software**. Click on the + (plus) sign to expand **10202: Email**. Result: Your Classify dialog box should look similar to this. 

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Creating a Service Request continued

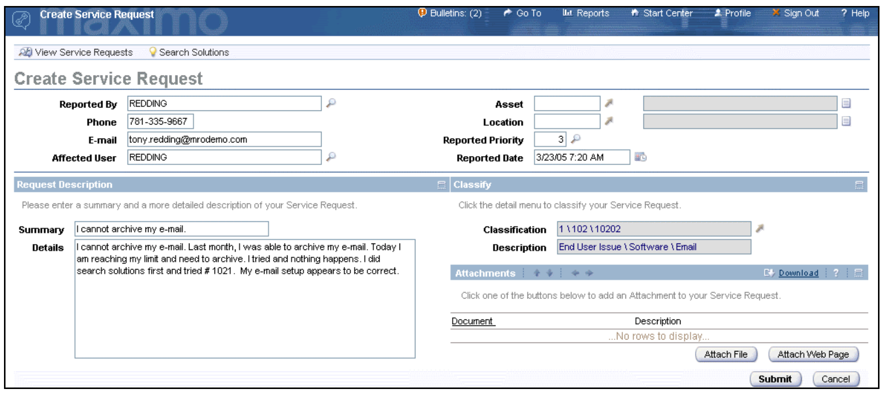
Exercise: Create an SR

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9</td><td>

Because none of the lowest classifications under 10202: Email applies, click to select **10202: Email**.

Result: The Classify dialog box closes and you are returned to your SR with your selected value in the Classification field.

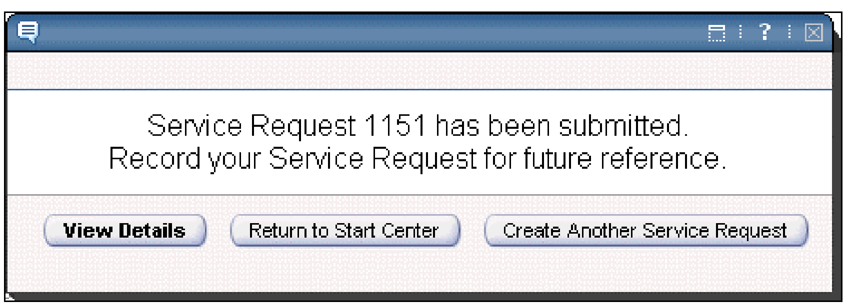


</td></tr>
<tr><td>10</td><td>

Review your SR.

Click **Submit**.

Result: An informational dialog box opens, similar to this one, with three options.



Write your SR # here ____________________.

</td></tr>
</table>

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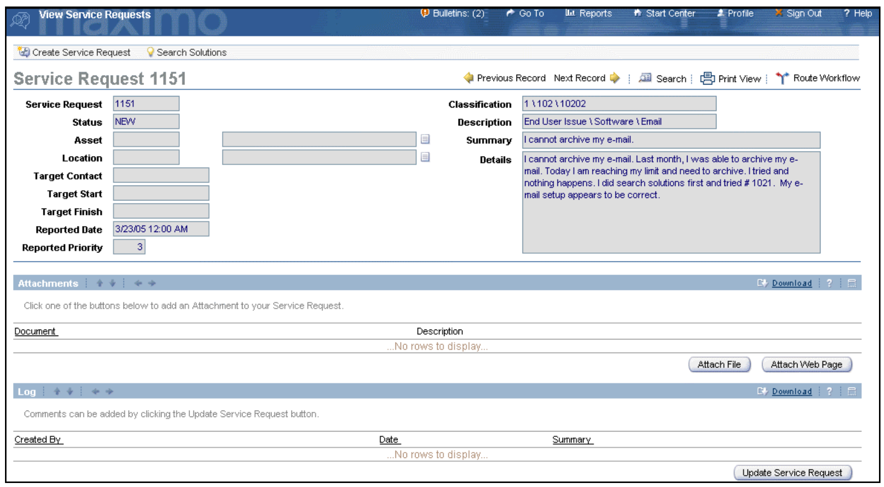
Creating a Service Request continued

Exercise: Create an SR continued

Step	Action
11	Click **View Details**. Result: The View Service Requests application opens, displaying the details of your submitted SR. 
12	At this point you can review and update your SR. We will do this in the next section. Close the **View Service Requests** application by returning to the **Start Center**.

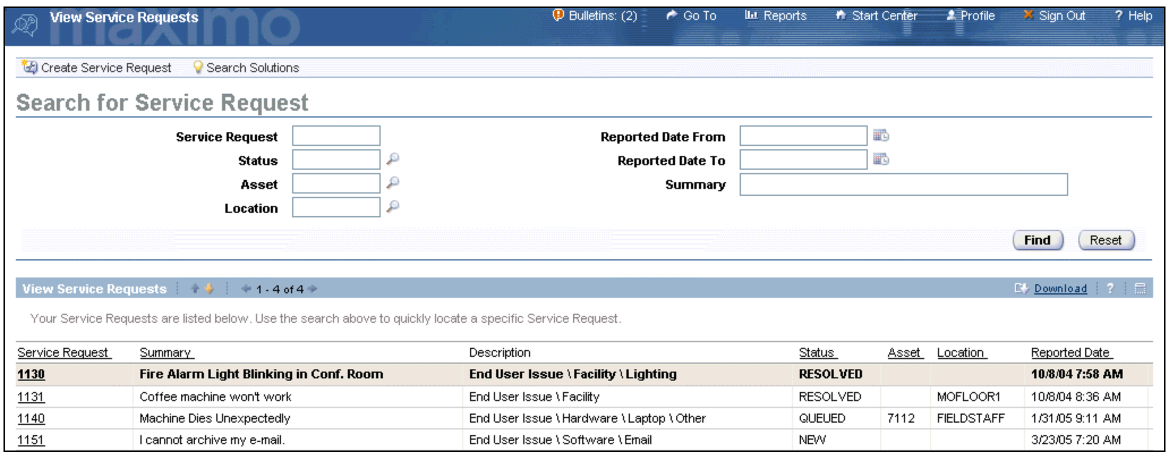
Viewing Service Requests

The View Service Requests Application

The View Service Requests application contains a single table window, which displays the service requests that you created.

You can view and print details for a service request. You can add or view attachments, such as documents or Web pages. You can also view and update the Service Request log, which contains communications to and from the service desk agent who is handling this request.

Above the View Service Requests table window are fields by which you can search for your service request.



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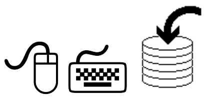
Viewing Service Requests continued

Exercise: Searching for and Viewing a Specific SR

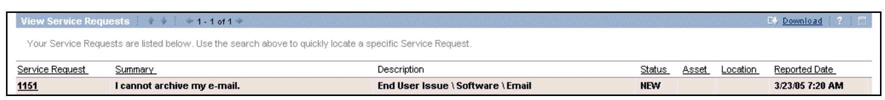


Although there might be only a few SRs displayed in this example, we will assume that in time you will have many, and that finding a specific SR is not as easy as this data portrays.

Scenario: As user Tony Redding, you want to find and view your recently submitted SR.

Note: Your display might differ from the data pictured in this section, depending on your training environment.

Use the following steps to search for your SR.

Step	Action
1	Open the **View Service Requests** application. Note: You should still be signed in to Maximo as Tony Redding. Result: The View Service Requests application opens in search mode, with a listing of all of your SRs in the bottom section.
2	Enter archive in the **Summary** field.
3	Click **Find**. Result: Maximo displays all of your SRs with the word *archive* in their Summary field (only one in our example). 

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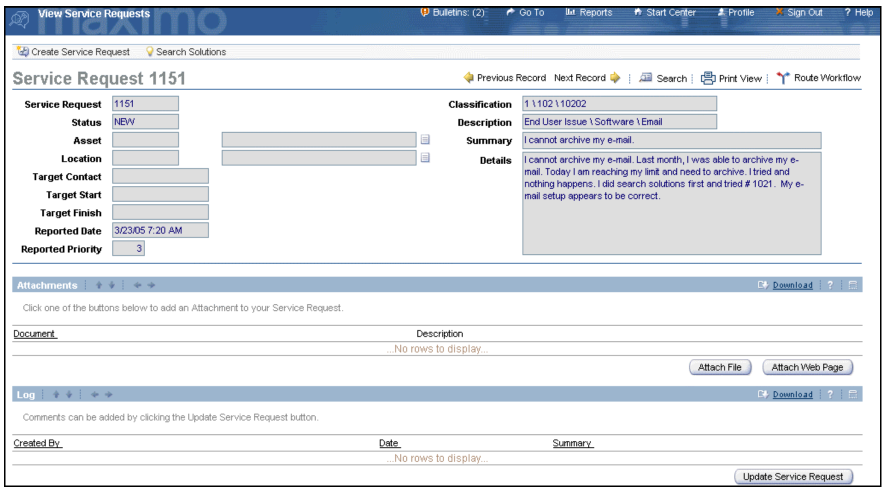
Viewing Service Requests continued

Exercise: Searching for and Viewing a Specific SR

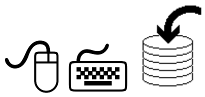
continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Click to select your SR (from the previous exercise).
Result: Maximo displays your SR.

</td></tr>
<tr><td>5</td><td>Do not close the View Service Requests application; we will continue the next exercise from here.</td></tr>
</table>

continued on next page

Viewing Service Requests continued

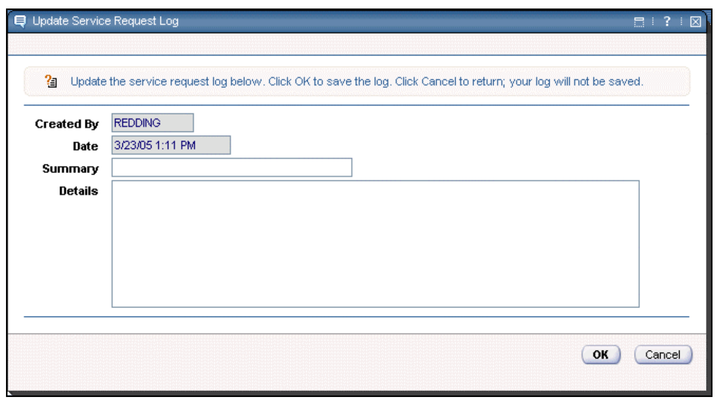
Exercise: Updating an SR

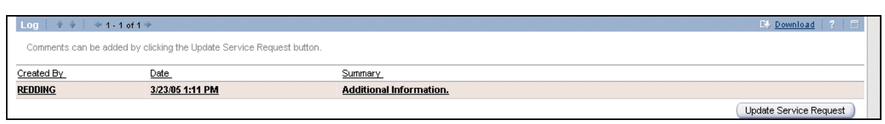


Maximo enables users to update their SRs.

Scenario: You, as Tony Redding, remember that there was an error message when you tried to archive your e-mail.

Use the following steps to update your SR from the previous exercise.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Ensure that you have the View Service Requests application open to your SR from the previous exercise.
Note: You should still be signed in to Maximo as Tony Redding.</td></tr>
<tr><td>2</td><td>Click Update Service Request.
Result: The Update Service Request Log dialog box opens.


</td></tr>
<tr><td>3</td><td>Enter the following information, and then click OK:
Field / Value
Summary: Additional Information xx.
Details: When I tried to archive my e-mail, I received a “File Not Found” error message.
Result: The Update Service Request Log dialog box closes, and your SR record is appended with the additional communication log.


</td></tr>
<tr><td>4</td><td>Sign out of Maximo.</td></tr>
</table>

Receiving Service Requests

Introduction

Submitting SRs through the Maximo Create Service Requests application is just one method for receiving SRs from users. Your organization might have a telephone number or call center set up. Maximo can also receive SRs via e-mail. Your organization might use some or all of these methods for receiving SRs into your service desk.

The Service Requests Application

Use the Service Requests application to create, view, and resolve service requests from customers or requestors. The request can be to resolve an issue, obtain new service, obtain information, or change a current service.

An agent creates a service request record to track all contacts from a requestor, capture information from the requestor, and determine what, if any, further action is needed.

A requestor can either contact the service desk agent or create a service request via e-mail or another form of communication. The agent views these requests in the Service Requests application and either resolves them or delegates them to another party for resolution.

Service request records are a type of ticket. Other ticket types are incidents and problems. The ticket applications are closely related and share many features, including the ability to define relationships between tickets, link them together for information purposes, and view the linkages and details in the appropriate applications.

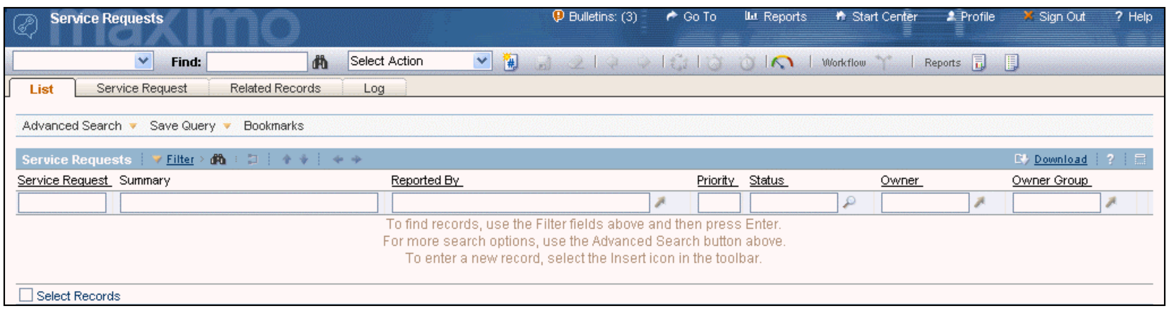
continued on next page

Receiving Service Requests continued

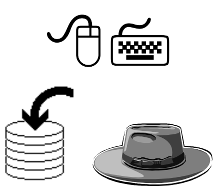
Service Requests Application Tabs

The Service Requests application contains the following tabs:

- **List** to search Maximo for service requests.
- **Service Request** to create, modify, view, and delete identifying information for the service request.
- **Related Records** to relate, view, and navigate relationships between service requests, incidents, problems, and other records.
- **Log** to create, view, edit, and delete work log entries, and view communication log entries.



Exercise: Receiving an SR via Telephone



Scenario: A user, Javier Ramirez, calls your service desk phone number to report that he cannot connect to the local area network. As a service desk agent:

- you search through the Solutions Knowledge Base and look for an existing solution;
- finding none, you enter the information into Maximo through the Service Request application.

Use the following steps.

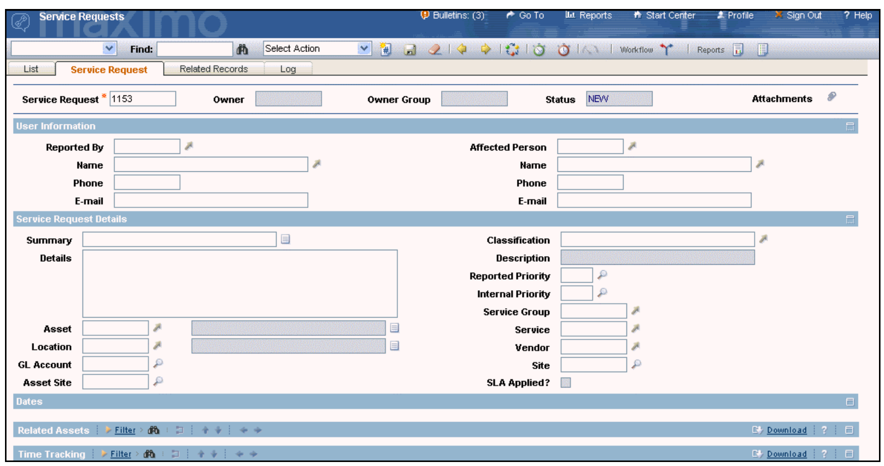
Step	Action
1	Sign in to Maximo as Tier 1 Agent Bill Sinclair (sinclair/sinclair). Result: Maximo displays the Start Center assigned to Bill Sinclair.

continued on next page

Receiving Service Requests continued

Exercise: Receiving an SR via Telephone

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>
Javier Ramirez calls your service desk phone number to report a problem.
<u>Note</u>: A best practice is to encourage users to use the Self-Service functionality of Maximo; however, because this user is having trouble connecting, he used the service desk phone number as a viable alternative.
From the Quick Insert portlet, click New Service Request.
<u>Result</u>: The Service Request tab opens with a new record ready for editing.


Write your SR # here: ____________________.
</td></tr>
</table>

continued on next page

Receiving Service Requests continued

Exercise: Receiving an SR via Telephone

continued

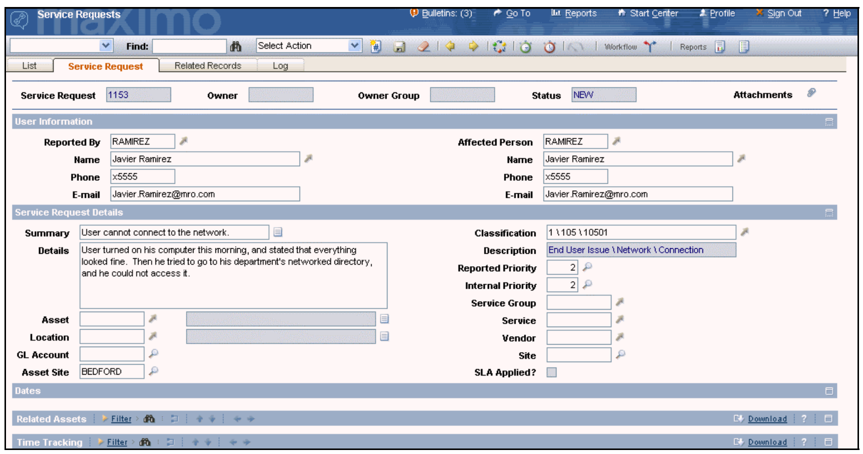
Step	Action
3	Enter rami into the **Reported By** field, then **Tab** out of it. Result: Information for Javier Ramirez populates the User Information fields.
4	As you gather the information from this user, enter the information into Maximo, as follows: **Field** — **Value** **Summary**: User *xx* cannot connect to the network. **Details**: User *xx* turned on his computer this morning, and stated that everything looked fine. Then he tried to go to his department's networked directory, and he could not access it. **Classification**: 1: End User Issues 105: Network 10501: Network Connection Hint: Use Classify from the Detail menu. **Reported Priority**: 2 (High) **Internal Priority**: 2 (High)

continued on next page

Receiving Service Requests continued

Exercise: Receiving an SR via Telephone

continued

Step	Action
5	**Save** the record, then return to the **Start Center**. Result: Your record should look similar to this. 

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Receiving Service Requests continued

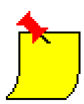
Receiving SRs via E-mail

Submitting SRs through the Maximo Create Service Requests application is just one method for receiving SRs from users. Your organization might have Maximo set up to receive SRs via e-mail.

Warning: The following e-mail–dependent exercises rely on three environmental conditions:

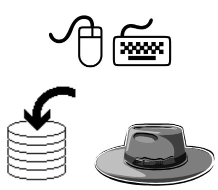
- The exercises require external Internet access to a specific external mail server (*pop.hotpop.com, port 110*).
- The exercises require an installed e-mail client.
- The exercises require access to a mail server for the e-mail client.

Given these conditions, the following e-mail–dependent exercises will work in an MRO Open School environment with appropriate Internet access. They might or might not work in any other training environment.



Note: The data entered through these e-mail–dependent exercises is required. Therefore, for the training environments that do not allow the actual exercises to be completed, each exercise suggests an Alternative.

Exercise: Submit an SR via E-mail



Scenario: A user, Henry Lowe, is remote and cannot access the Maximo Self-Service functionality. The user has access to e-mail and can use the special service desk e-mail account that your organization has set up as a viable alternative. He sends an e-mail because his hard drive is making a funny noise.

Use the following steps to submit an SR via e-mail.

Step	Action
1	As user Henry Lowe, open your e-mail client. Note: Your specific actions will vary, depending on the available e-mail client and your training environment.

continued on next page

Receiving Service Requests continued

Exercise: Submit an SR via E-mail continued

Step	Action
2	Enter the following information into your e-mail. Note: The actual field names might vary, depending on your e-mail client. **Field** — **Value** **To** — mrotrng@hotpop.com **Subject** — My hard drive *xx* is making a noise. **Text/Message** — I turned on my laptop *xx* and my hard drive started making an atypical noise.
3	Send your e-mail.
4	Close your e-mail client program. Alternative: Because this is an e-mail dependent exercise, if you were not able to complete it due to your training environment, enter the information directly into a new SR by following the Alternative instructions in the next exercise.

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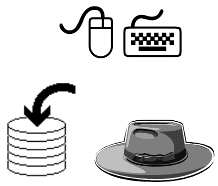
Receiving Service Requests continued

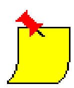
Exercise: View an SR submitted via E-mail



Scenario: As Tier 1 Service Desk Agent Bill Sinclair, your responsibility is to check for incoming SRs submitted via e-mail.

Use the following steps to check for the SR submitted via e-mail.

Alternative: If you were not able to complete the previous exercise due to your training environment, enter the information from the previous exercise into a new SR in this exercise, as directed by following the Alternative instructions.

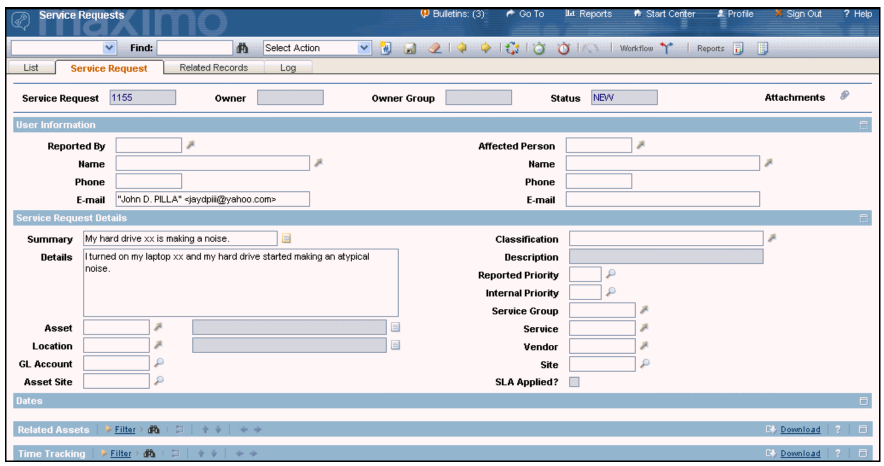
Step	Action
1	Sign in to Maximo as Tier 1 Agent Bill Sinclair (sinclair/sinclair). Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	Open the **Service Requests** application.
	Alternative: Because the previous exercise is an e-mail dependent exercise, *if* you were not able to complete it due to your training environment, create a new SR and enter the following information: **Field** — **Value** **E-mail** — [*Your e-mail address*] **Summary** — My hard drive *xx* is making a noise. **Details** — I turned on my laptop *xx* and my hard drive started making an atypical noise. **Save** your record, and write your new SR # here: ______________.

continued on next page

Receiving Service Requests continued

Exercise: View an SR submitted via E-mail

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>
If you did not use the Alternative, then search for and select your SR submitted via e-mail from the previous exercise.
Hint: Filter by entering hard drive in the Summary field and new in the Status field.
Result: The Service Request tab opens with your selected SR ready for editing.


</td></tr>
<tr><td>4</td><td>Write your SR # here: ____________________.</td></tr>
</table>

continued on next page

Receiving Service Requests continued

Exercise: View an SR submitted via E-mail

continued

Step	Action
5	As you might have noticed, when Maximo receives an SR via e-mail, only three fields are filled with data: **Field** — **Source** **E-mail** — Sender's e-mail address **Summary** — The e-mail's **Subject** field **Details** — The e-mail's **text/message** field. Add the following information to your SR: **Field** — **Value** **Reported By** — HenryL (Henry Lowe) Note: When an e-mail contains an inline graphic, the Maximo E-mail Listener will parse out the graphic and list it as an attachment. When an e-mail contains any attachments, regardless of type, the E-mail Listener will parse them out, store them, and list them in the database.
6	**Save** your record and close the **Service Requests** application. Result: Maximo returns you to the Start Center assigned to Bill Sinclair. While the Maximo E-mail Listener creates an SR from the incoming e-mail, it does not add any other details (for example, the reported priority and the classification). We could have entered additional information here; however, some organizations might use Workflow to automatically process SRs received by e-mail into incidents. At this point in the course, we will move on to the incident management process in the next chapter, and continue working on this and the other previously created SRs as we navigate the processes in an ITIL framework.

Chapter Summary

The Service Desk

The Create Service Request application works in combination with the View Service Requests and the Search Solutions applications. With a single login, you can easily search for potential solutions to your issue, create a service request if necessary, and view details, including communications, for all requests you have made.

The Bulletin Board Application

The Bulletin Board application is an efficient tool for facilitating the flow of information between service desk agents, as well as to end users.

By creating and posting messages on the Bulletin Board, you can minimize the creation and duplication of tickets. Bulletin Board messages can be targeted to a specific audience (based on organization, site, or person group). If an audience is not specified, then any user who signs in to Maximo can view the Bulletin Board messages.

You can specify the date and time you want the message to appear on the Bulletin Board. You can also define a date and time when you want the message to be automatically removed from the Bulletin Board.

The Search Solutions Application

You use the Search Solutions application to allow customers to search and view solutions from the Maximo simplified knowledge base (a Solution Database) to resolve their problems on their own.

The Search Solutions application contains a single table window, which displays a list of commonly asked questions or common problems and their solutions.

Search for potential solutions before submitting a service request. The Search Solutions application provides an easy way to search for answers that will help you. You can select and view details of any solution and its related attachments, such as documents or Web pages.

After viewing a solution, you can:

- indicate that the solution helped you, or
- create a service request, or
- search again.

continued on next page

Chapter Summary continued

Creating a Service Request

Recall that the service desk is the central point of contact for users. Through the service desk, users submit service requests (SRs). Maximo provides several ways for users to submit SRs.

You use the Create Service Request application to request a repair or change to your service. You might request the service for yourself or on behalf of another party. In general, you should search the existing library of solutions before submitting a service request.

You can attach documents or Web pages to the request. After creating the service request, you can review the details, submit another service request, or return to your Start Center.

Maximo creates an unassigned SR that, by using Workflow, can be assigned to an agent. When assigned, the agent takes appropriate action and can communicate ongoing activities or a resolution to you.

Viewing Service Requests

The View Service Requests application contains a single table window, which displays the service requests that you created.

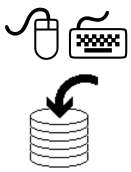
You can view and print details for a service request. You can add or view attachments, such as documents or Web pages, You can also view and update the Service Request log, which contains communications to and from the service desk agent who is handling this request.

Receiving Service Requests

Submitting SRs through the Maximo Create Service Request application is just one method for receiving SRs from users. Your organization might have a telephone number or call center set up. Maximo can also receive SRs via e-mail. Your organization might use some or all of these methods for receiving SRs into your service desk.

Workshop

Exercise: Duplicate an SR



This is a required exercise.

Earlier in this chapter, you created an SR for user Tony Redding because he could not archive his e-mail. In the next chapter, we will compare processing this SR by using Workflow and by not using Workflow. In order to do so, we must duplicate this SR.

Note: In this exercise, for training purposes, we are going to search for and select a specific SR. In your working environment, you might have different business processes, which might include a default query for new SRs listed by priority.

Use the following steps to duplicate the SR.

Step	Action
1	Sign in to Maximo as Tier 1 Agent Bill Sinclair (sinclair/sinclair). Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	Open the **Service Requests** application. Note: You cannot use the Work view Result Set on the Start Center to find this ticket, because result sets filter by OWNER, and this SR has not yet been assigned.
3	Search for all new service requests. Hint: Enter new into the Status field. Result: Maximo displays all new SRs.

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Workshop continued

Exercise: Duplicate an SR

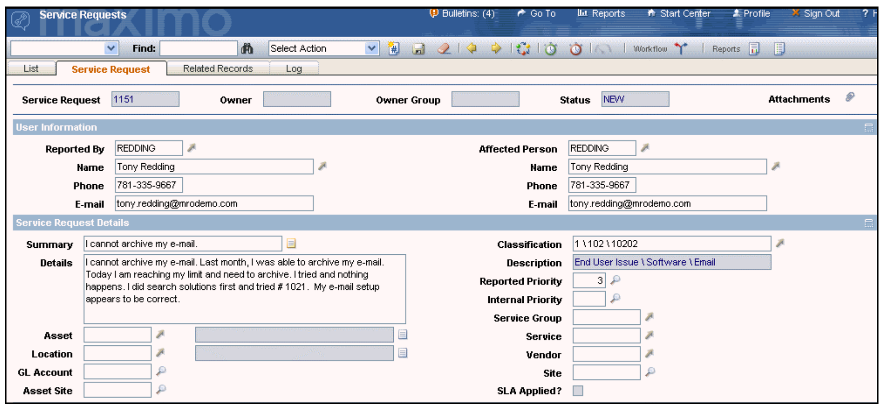
continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Find and select the SR from Tony Redding:

I cannot archive my e-mail.

<u>Hint</u>: You created this SR in the previous chapter, and wrote down the SR number.

<u>Result</u>: Maximo displays the SR.


</td></tr>
<tr><td>5</td><td>From the Select Action menu, choose Duplicate SR.

<u>Result</u>: Maximo duplicates the SR.

Write the duplicate SR number here: ____________________.</td></tr>
<tr><td>6</td><td>Change the text in the Summary field as follows:

I cannot archive my e-mail xx (Duplicate).</td></tr>
<tr><td>7</td><td>Save your record.</td></tr>
<tr><td>8</td><td>Return to the Start Center.</td></tr>
</table>

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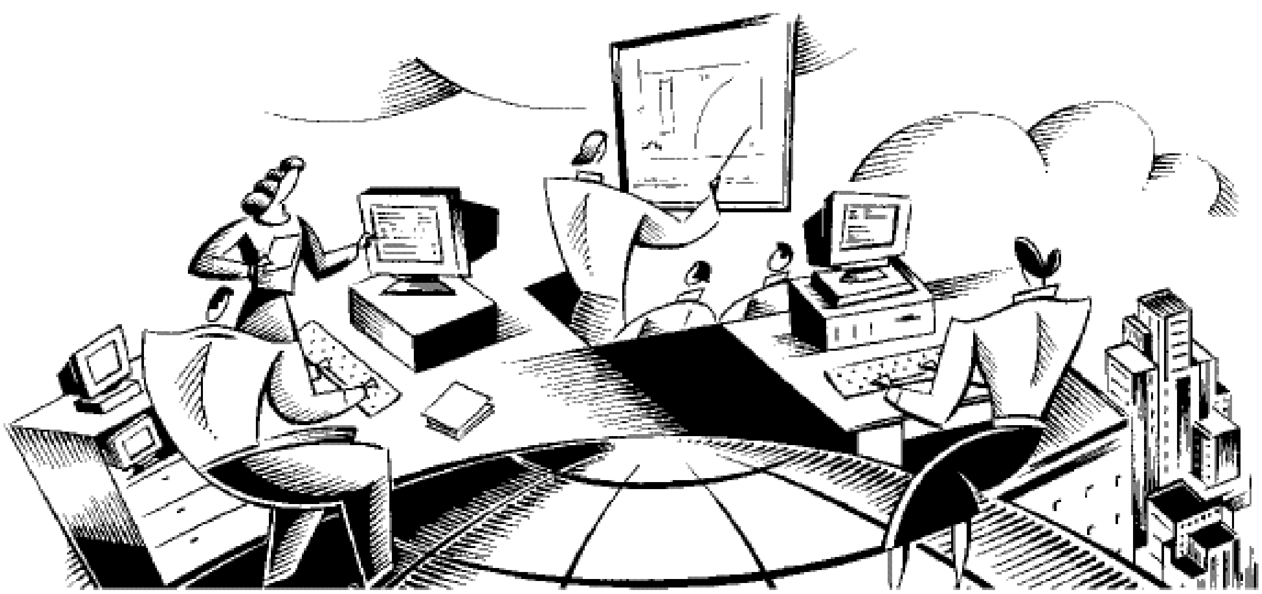
NOTES:

Chapter 5: Incident Management—Basic Concepts



In This Chapter

This chapter contains the following topics:

Chapter Overview

Introduction

This chapter discusses the incident management process and how Maximo supports this process within the ITIL framework.

Chapter Focus

The focus of this chapter is to use a single scenario that takes you through the entire process of using Maximo to manage incidents from beginning to end.

Learning Objectives

When you have completed this chapter, you should be able to:

- Define the incident management process
- Create an incident from an SR
- View related records for an incident
- Take ownership of an incident
- Change the status of an incident
- Route an incident through workflow
- Modify an incident
- Apply an SLA to an incident
- Create a communication
- Apply a communication template
- View the communication log
- View the work log
- Create a work log entry
- Research possible solutions for an incident resolution
- Resolve an incident
- Create a solution for an incident

Incident Management: Overview

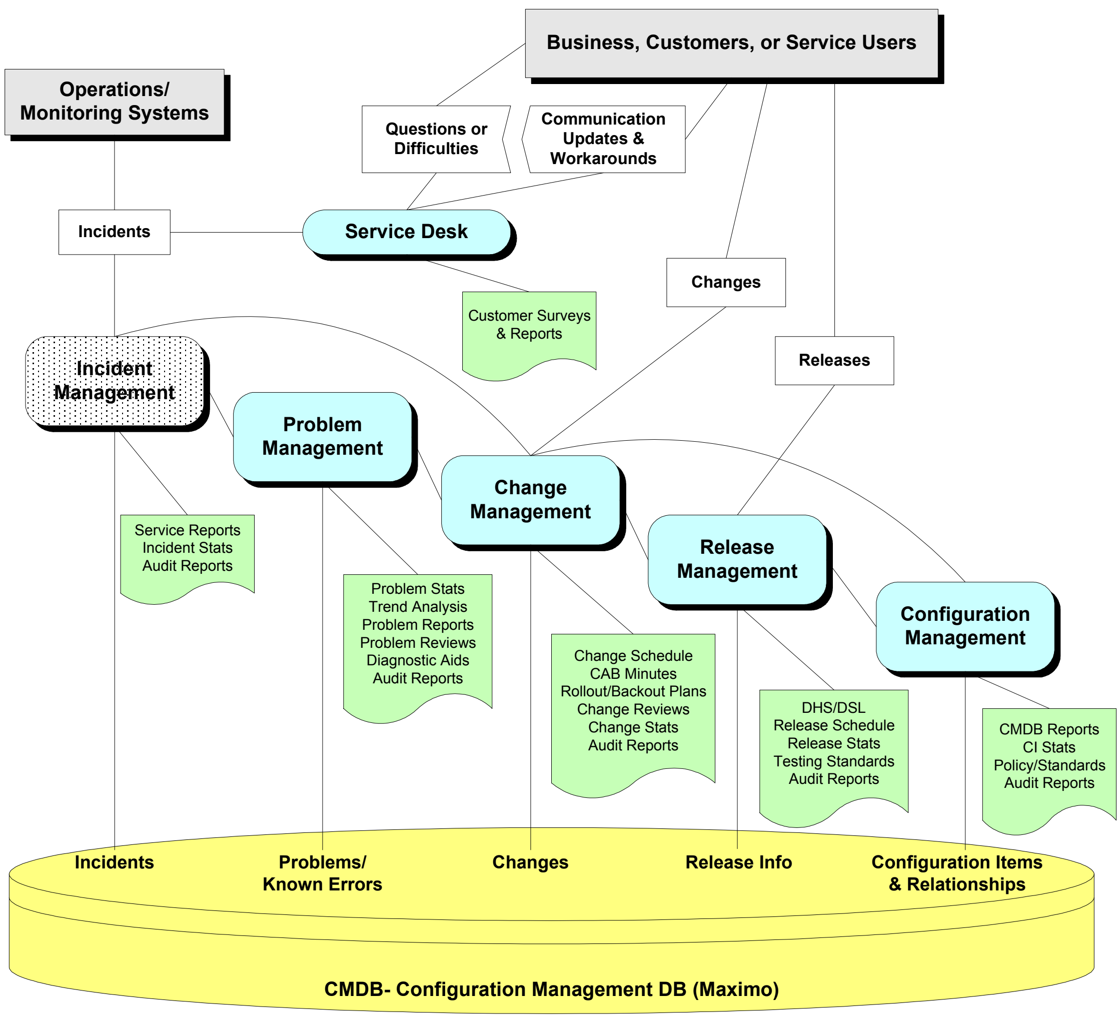
Introduction

"The goal of incident management is to restore normal service operation as quickly as possible with minimum disruption to the business, thus ensuring that the best achievable levels of availability and service are maintained."

Reference: itSMF: IT Service Management.

You Are Here

Recall this diagram depicting the various IT Service Management processes. Notice the dotted Incident Management area. Throughout this chapter, we will be discussing the incident management process in Maximo.



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Incident Management: Overview continued

Definition

An *incident* is any event that is not part of the standard operation of a service and that causes, or might cause, an interruption to or a reduction in the quality of that service.

Responsibilities

The actual roles and responsibilities of incident management will depend on the procedures that your organization has put into place. These could include:

- Incident detection and recording
- Classification of all incidents, and initial support
- Investigation and diagnosis
- Resolution and recovery
- Incident closure
- Incident ownership, monitoring, tracking, and communication

Sources

Sources of incidents include:

- Users (Self-Service requests, e-mail, phone, walk-in, fax)
- Operations
- Network management – monitoring tools
- System management – monitoring tools

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Incident Management: Overview continued

Incident Statuses in Maximo

The status of an incident changes as it moves toward completion. The following information describes the default statuses for incidents. Your system administrator might have added, removed, or changed the names of these supplied statuses.

Status	Description
NEW	Applies when you create or insert an incident. You cannot revert to this status after you change it.
QUEUED	Applies when incident ownership is given to a person or a group. Ownership assignment can be made manually or might be made automatically via Workflow, an associated SLA escalation action, or other escalation process. For more information, see the Workflow Help or the Service Level Agreements Help, respectively.
INPROG	In progress. Applies when someone is working on this incident. The first time an incident reaches this status, Maximo populates the Actual Start field, if it is empty.
PENDING	Applies when an incident is pending an action (for example, vendor or user callback, or waiting for parts).
RESOLVED	Applies when information has been gathered and routed, service has been restored, or a solution has been provided. The first time an incident reaches this status, Maximo populates the Actual Finish field, if it is empty. If needed, you can reopen an incident and change the status from RESOLVED to INPROG (in progress).
CLOSE	Closed. Applies when an incident becomes a historical record. When a record is closed, you cannot change the status. You can, however, edit certain parts of the history record.

Summary

The goal of incident management is to restore normal service operation as quickly as possible. Throughout this chapter, you will learn how Maximo supports the incident management process.

The service desk usually plays the key role in the incident management process: recording and monitoring the progress of incidents.

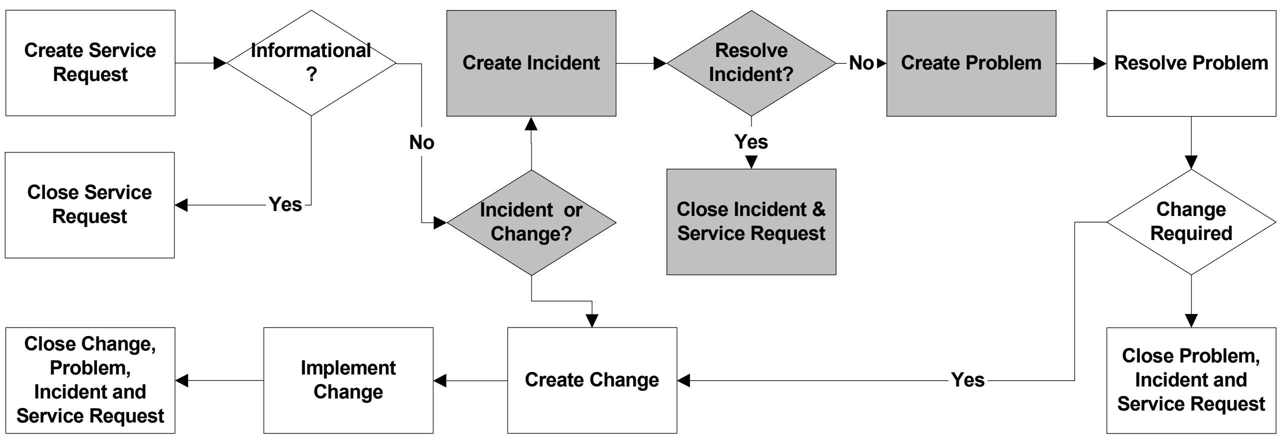
Creating Incidents

Introduction

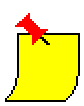
Incidents can be created from several sources. Typically, service desk agents create incidents from SRs.

Incident Process Flow

The following typical ticket process flow depicts the portion (Incidents) that we will be covering in this chapter.



Note



Note: In the following exercise, for training purposes, we are going to search for and select a specific SR. In your working environment you will have different business processes, which might include a default query such as one for new SRs listed by priority.

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Creating Incidents continued

Exercise: Creating an Incident from an SR

You can create incidents from SRs using the Service Requests application.

Scenario: A user, Tony Redding, cannot archive his e-mail. He searched for a solution but did not find one that addressed his problem. He submitted an SR.

As Tier 1 Service Desk Agent Bill Sinclair, you will process his SR into an incident. Use the following steps.

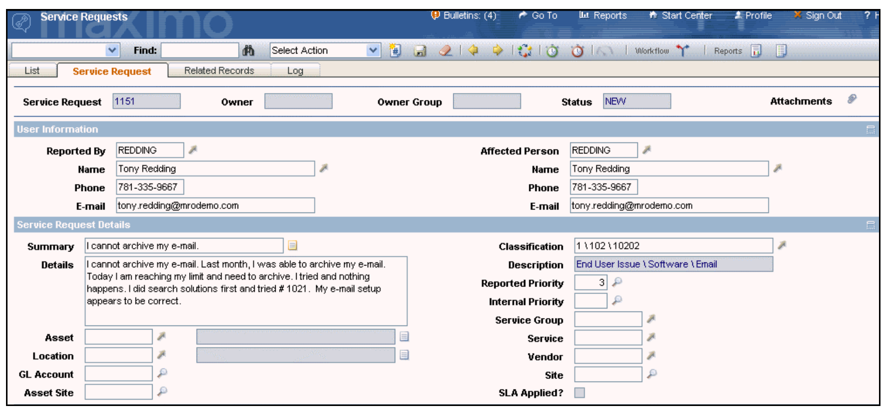
Step	Action
1	Sign in to Maximo as Tier 1 Agent Bill Sinclair (sinclair/sinclair). Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	Open the **Service Requests** application. Note: You cannot use the Work View Result Set on the Start Center to find this ticket, because result sets filter by OWNER/ OWNERGROUP, and this SR has not yet been assigned. However, if you did the [optional] workshop exercise in Chapter 3, then you can use the Favorite Applications portlet to open the Service Requests application. Moreover, you could create a result set that displays all unassigned SRs sorted in chronological order.
3	Search for all new service requests. Hint: Enter new in the Status field. Result: Maximo displays all new SRs.

continued on next page

Creating Incidents continued

Exercise: Creating an Incident from an SR

continued

Step	Action
4	Find and select the SR from Tony Redding: **I cannot archive my e-mail** ***xx*****.** Hint: You created this SR in the previous chapter and recorded the SR #. For convenience, you can rewrite it here: _______________. Result: Maximo displays the SR. 
5	From the **Select Action** menu, choose **Create > Incident**. Result: Maximo creates an incident from the SR. Write the incident # here: ______________________.
6	Do *not* close the **SR** application; we will continue the next exercise from this point.

continued on next page

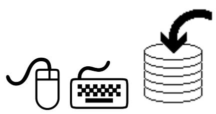
Creating Incidents continued

Related Records

Tickets can be related to other tickets and work orders in several ways. You might create these relationships for information purposes, or Maximo can create relationships when you take certain actions. The word *ticket* is a generic term for service requests, incidents, and problems.

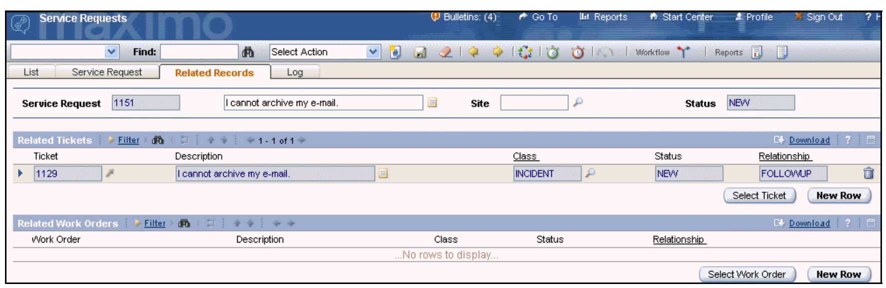
You use the Related Records tab to create, view, or navigate relationships among service requests, incidents, problems, and other records.

Exercise: Viewing Related Records



In this exercise, you will use the Related Records tab to view the incident ticket that you created from the SR ticket.

Use the following steps.

Step	Action
1	With your SR from Tony Redding open in the **Service Requests** application, click on the **Related Records** tab. <u>Result</u>: Related records display for this record.  Notice that the Related Records tab shows the incident you just created from the SR. If you were not able to earlier, write your incident # here: ____________________.
2	Click **View Details** and look at the details for the incident record.
3	Do *not* close the **SR** application; we will continue the next exercise from this point.

Incident Ownership

Introduction

Use the Incidents application to create and modify incident records.

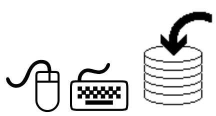
An incident record is a type of ticket. Other ticket types are service requests and problems. The ticket applications are closely related and share many features.

You create an incident record to capture information about an event that deviates from standard service or an event that might disrupt the quality of that service.

Incident Ownership

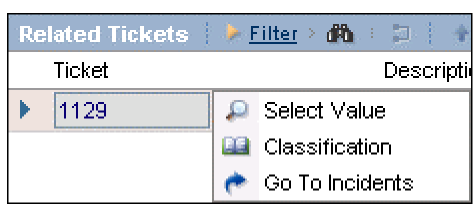
The owner of an incident is responsible for managing the work associated with that incident. You can either select an owner of an incident or take ownership yourself.

Exercise: Taking Ownership of an Incident



Tier 1 service desk agents will take ownership of and resolve some of the incidents.

Scenario: As Tier 1 Service Desk Agent Bill Sinclair, you will open the incident from user Tony Redding and take ownership of it.

Step	Action
1	With your SR from Tony Redding open to the **Related Records** tab in the **Service Requests** application, click the **Detail Menu** button of the **Ticket** field for the incident. Result: Maximo displays the Detail Menu. 

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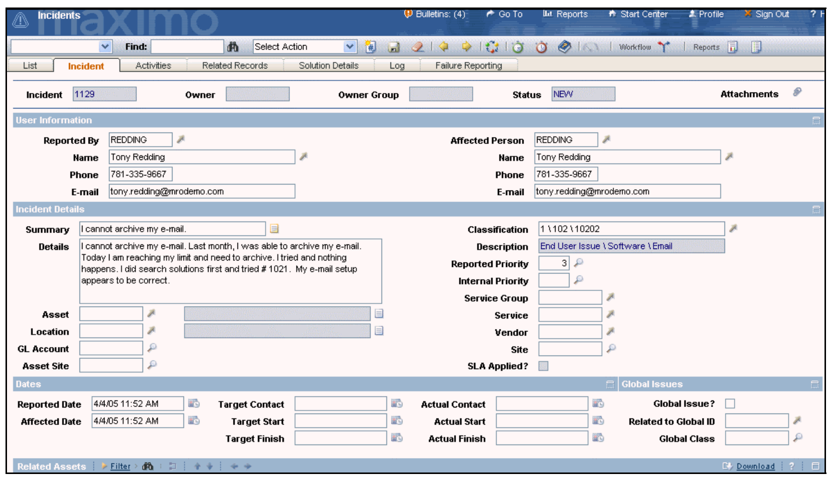
Incident Ownership continued

Exercise: Taking Ownership of an Incident continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>

From the **Detail Menu**, choose **Go To Incidents**.

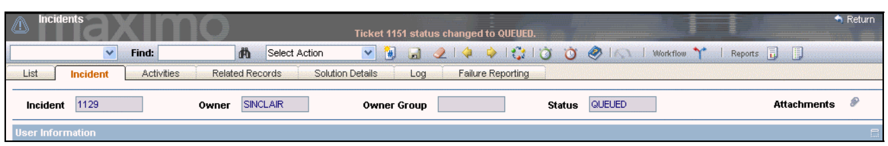
<u>Result</u>: The Incidents application displays the incident.



</td></tr>
<tr><td>3</td><td>

From the **Select Action** menu, choose **Take Ownership**.

<u>Result</u>: This incident is now assigned to you, as Bill Sinclair.



Notice the changes to both the Owner field and the Status field.

</td></tr>
<tr><td>4</td><td>

Go to the **Related Records** tab.

What is the status of the originating SR? ____________________.

</td></tr>
</table>

continued on next page

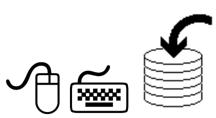
Incident Ownership continued

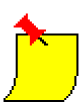
Exercise: Taking Ownership of an Incident

continued

Step	Action
5	You could work on the incident here; however, for training purposes we will come back to this incident by another path. Click the **Return** link. <u>Result</u>: You are returned to the SR application.
6	Now notice that the SR status has also changed. Return to the **Start Center**.

Exercise: Creating an Incident from an SR Using Workflow





You can create incidents from SRs using Workflow from the Service Requests application. This exercise is similar to the previous exercises, except that this exercise uses Workflow.

<u>Scenario</u>: A user, Tony Redding, cannot archive his e-mail. He searched for a solution and he did not find one that addressed his problem. He submitted an SR. (You created a duplicate in a previous chapter's Workshop.) As Tier 1 Service Desk Agent Bill Sinclair, you will process the (duplicate) SR into an incident using Workflow.

<u>Note</u>: This exercise uses two separate Workflow processes that come with the *maxdemo* database used for training: one for SRs and one for incidents. The Workflow processes in your actual work environment(s), if designed, will most likely differ from those used in training.

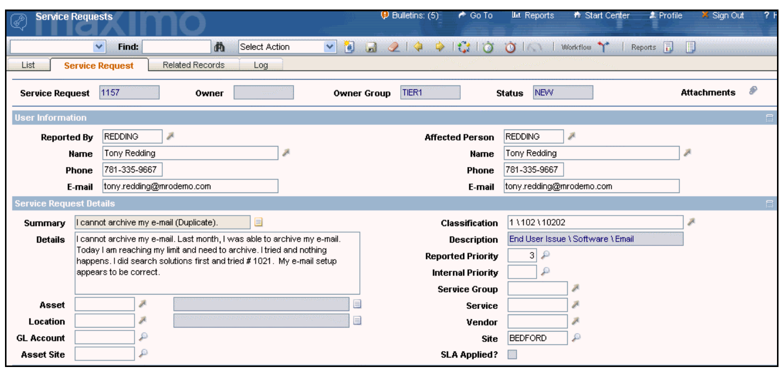
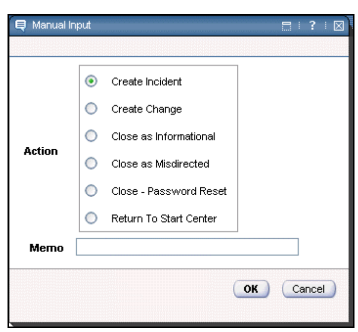
Step	Action
1	Sign in to Maximo as Tier 1 Agent Bill Sinclair (sinclair/sinclair). <u>Result</u>: Maximo displays the Start Center assigned to Bill Sinclair.
2	Open the **Service Requests** application. <u>Note</u>: You cannot use the Work View Result Set on the Start Center to find this ticket, because result sets filter by OWNER and this SR has not yet been assigned. However, if you did the Workshop exercise in Chapter 3, then you can use the Favorite Applications portlet to open the Service Requests application.

continued on next page

Incident Ownership continued

Exercise: Creating an Incident from an SR Using Workflow

continued

Step	Action
3	Search for all new service requests. Hint: Enter new in the Status field. Result: Maximo displays all new SRs.
4	Find and select the SR from Tony Redding: **I cannot archive my e-mail *xx* (Duplicate)**. Hint: You created this SR in a previous chapter and recorded the SR #. For convenience, you can rewrite it here: _______________. Result: Maximo displays the SR. 
5	Click the **Route Workflow** button . Result: A Workflow-produced Manual Input dialog box opens. 

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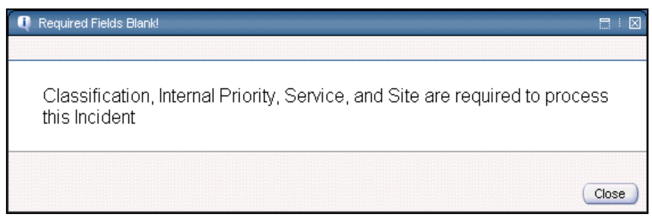
Incident Ownership continued

Exercise: Creating an Incident from an SR Using Workflow

continued

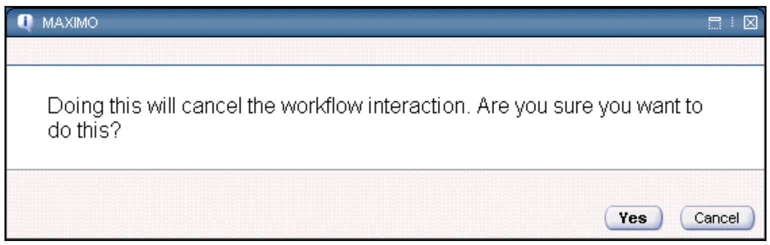
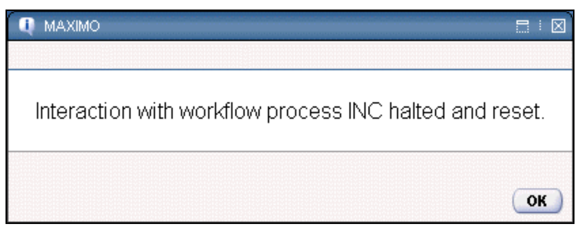
Step	Action
6	Ensure that the **Create Incident** option is checked and click **OK**. Result: An incident is created. Workflow takes you to the Incidents application, which is open to the newly created incident.
7	Write your new incident number here: _________________.
8	Click the **Route Workflow** button (again). Result: A Workflow-produced Required Fields Blank dialog box opens.  Note: These fields are required for the Workflow process in a standard MRO Software training environment using the *maxdemo* database. If you are not in a standard MRO Software training environment, you will most likely have different Workflow processes, and thereby different requirements.
9	Click **Close**. Result: The Required Fields Blank dialog box closes. We will continue processing the incident after we discuss the Incidents application.

continued on next page

Incident Ownership continued

Exercise: Creating an Incident from an SR Using Workflow

continued

Step	Action
10	Return to the **Start Center**. Result: You might get a message similar to the following: 
11	If you get this message, click **Yes**. Result: You are returned to the Start Center, and a Maximo message box opens. 
12	Click **OK**.

Discussion

What are the differences between processing an SR using Workflow vs. processing an SR manually?

What are the benefits of using Workflow?

How could Workflow be used in your environment?

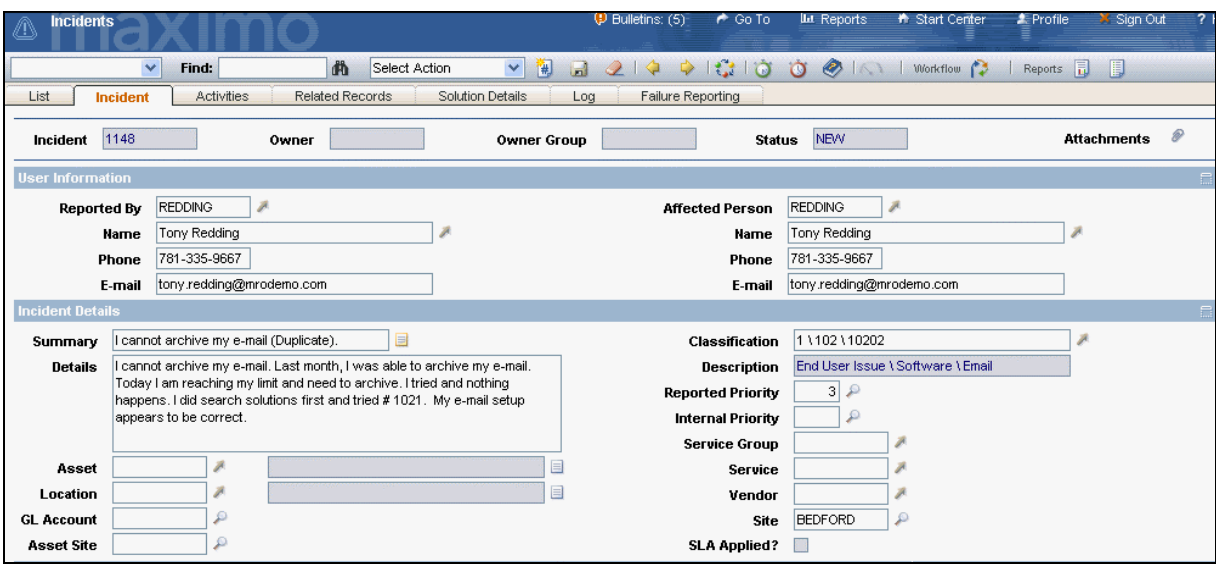
Modifying Incidents

The Incidents Application

Use the Incidents application to create and modify incident records. You create an incident record to capture information about an event that deviates from standard service or an event that might disrupt the quality of that service. End users might or might not be aware of the event.

The Incidents application has the following tabs:

- **List** to search Maximo for incident records.
- **Incident** to create, modify, view, and delete identifying information for the incident record, and search for possible solutions.
- **Activities** to report actual labor time spent resolving the incident, and create, delegate, and track activity work orders for the incident. An activity is unplanned work delegated to others.
- **Related Records** to relate, view, and navigate relationships between service requests, incidents, problems, and other records.
- **Solution Details** to add or view solution information for this record.
- **Log** to create, view, edit, and delete work log entries, and view communication log entries.
- **Failure Reporting** to view and record failure information for assets and locations on an incident record.



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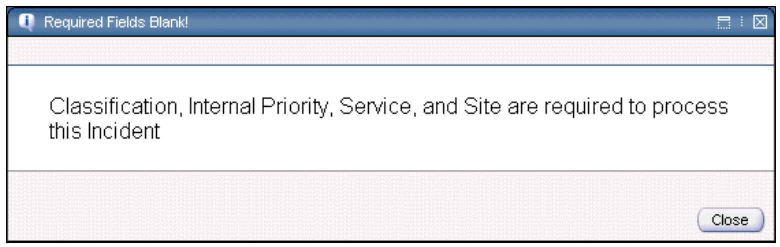
Modifying Incidents continued

Worflow Required Fields

Use the Incidents application to modify incidents. Your business environment could require specific fields to be filled in on the SR, the incident, or both.

In a standard MRO training environment, the *maxdemo* database used for training contains several Workflow processes. Moreover, as you have seen in the previous Workflow exercise, the Workflow process associated with incidents (in a standard MRO Software training environment) requires data in the following fields in order to route an incident record into Workflow:



Discussion

As a general business practice, you could require data for these fields on the SR before creating an incident.

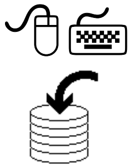
How would you accomplish this?

What are some reasons why you would not require data in specific fields for SRs?

continued on next page

Modifying Incidents continued

Exercise: Modifying an Incident



As you begin to work on a ticket, you should first change the status to **In Progress**, and then start the timer to record the amount of time spent working on each ticket.

Scenario: A user, Tony Redding, cannot archive his e-mail. He searched for a solution and did not find one that addressed his problem. He submitted an SR. In a previous exercise, as Tier 1 Service Desk Agent Bill Sinclair, you took ownership of the incident. This incident will now show up in the Work View for Bill Sinclair.

Use the following steps to work on and modify this incident.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Sign in to Maximo as Tier 1 Agent Bill Sinclair.

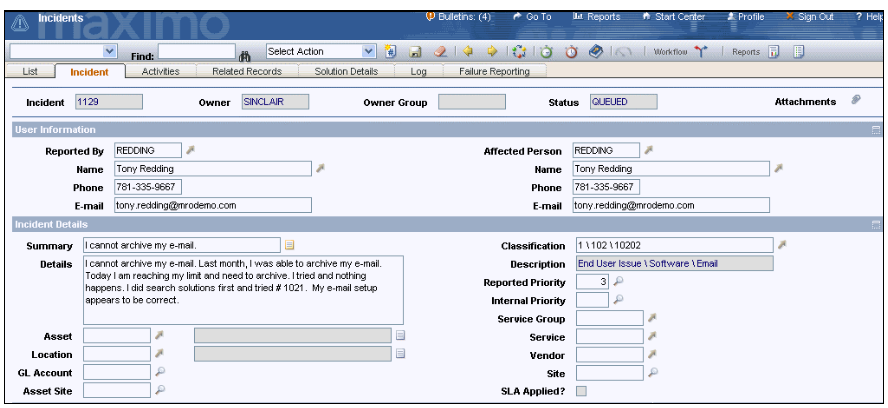
Result: Maximo displays the Start Center assigned to Bill Sinclair.</td></tr>
<tr><td>2</td><td>From the Work View, find and select the incident created from the SR submitted by user Tony Redding with the following description:

I cannot archive my e-mail xx.

Warning: Do not use the DUPLICATE incident in Workflow. You will need this for a later exercise.

Hint: You can use either the List View or the Graphical View. The status of this incident is QUEUED.

Result: The Incidents application opens with the selected incident.


</td></tr>
</table>

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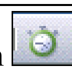
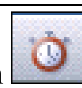
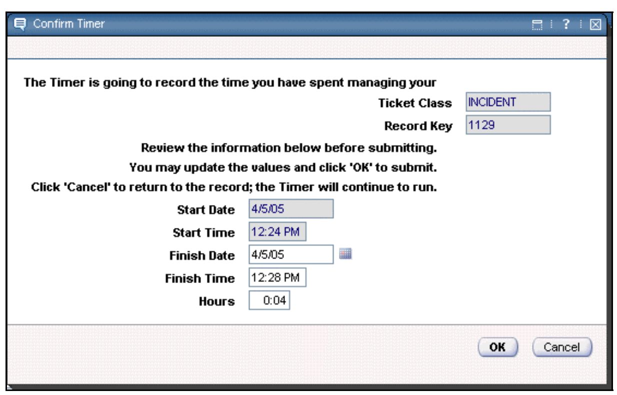
Modifying Incidents continued

Exercise: Modifying an Incident continued

Step	Action
3	Change the status of this incident to **In Progress**. Note: Changing statuses is covered in the MRO required prerequisite course *MXES Navigation & Querying*. Result: The status changes to INPROG (In Progress).
4	Click the **Start Timer** icon . Result: The timer begins recording the time spent working on this (incident) ticket.
5	Enter the following information: **Field** — **Value** **Internal Priority** — 3 **Service** — EMAIL **Site** — BEDFORD
6	Click the **Stop Timer** icon . Result: The Confirm Timer dialog box opens. 

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Modifying Incidents continued

Exercise: Modifying an Incident

continued

Step	Action
7	Confirm the actual time worked on this incident thus far. Ensure that at least 1 minute (00:01) is entered in the **Hours** field: If the **Hours** field in the Confirm Timer dialog box reads **00:00**, then change the **Hours** to a minimum of: **00:01**, then click **OK**. Result: The Confirm Timer dialog box closes. Note: Normally, in this type of scenario you would probably not stop the timer, but instead keep working on the incident. However, in a training environment, we are breaking the work into separate exercises. We stopped the timer so that, at the end, the record will reflect realistic times.
8	**Save** this record and return to the **Start Center**.

Service Level Agreements (SLAs)

As we have learned, a *service level agreement* is a written agreement between a service provider and customer that documents the agreed-upon levels of service. A *service* is a set of tasks provided by the service provider that fulfills one or more needs of the customer, and a *service level* (known as a *commitment* in Maximo) describes a measurable or quantifiable aspect of that service. Maximo users or a Workflow process can then apply valid SLAs to records from other Maximo applications. In a service desk environment, a user with the proper permissions can apply an SLA from within any of the ticket or work order applications.

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Modifying Incidents continued

Applying an SLA

As you begin to work on a ticket, you should also apply the appropriate SLA.

Scenario: A user, Tony Redding, cannot archive his e-mail. He searched for a solution and did not find one that addressed his problem. He submitted an SR. In a previous exercise, as Tier 1 Service Desk Agent Bill Sinclair, you took ownership and modified the incident.

Use the following steps to apply an SLA to this incident.

Step	Action
1	Sign in to Maximo as Tier 1 Agent Bill Sinclair. Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	From the Work View, find and select the incident created from the SR submitted by user Tony Redding with the following description: **I cannot archive my e-mail xx.** Warning: Do *not* use the **(Duplicate)** incident in Workflow. You will need this for a later exercise. Hint: The status of this incident is INPROG. Result: The Incidents application opens with the selected incident.
3	Start the timer.
4	From the **Select Action** menu, choose **Apply SLA**. Result: The Maximo menu bar *briefly* displays a message similar to the following: SLA 1003 has been applied. Note: Because this incident matches the criteria of only one SLA, that one was applied. If the ticket's criteria were such that more than one SLA might apply, you would select one to apply. Best Practice: You would normally incorporate the assigning of an SLA into a Workflow process.
5	Stop the timer. If the **Hours** field in the **Confirm Timer** dialog box reads **00:00**, change the **Hours** to a minimum of: **00:01**, then click **OK**.
6	**Save** the record and return to the **Start Center**.

continued on next page

Modifying Incidents continued

Exercise: Modifying an Incident in Workflow

Earlier we tried to enter an incident into Workflow. We could not because the incident Workflow process (in a standard MRO training environment using the *maxdemo* database) enforces specific requirements.

We will now complete the same procedures as in the previous exercise, except that we will use Workflow.

<u>Scenario</u>: A user, Tony Redding, cannot archive his e-mail. He searched for a solution and did not find one that addressed his problem. He submitted an SR. (You created a duplicate in a previous exercise, as Tier 1 Service Desk Agent Bill Sinclair.)

Use the following steps to work on and modify this incident using Workflow.

Step	Action
1	Sign in to Maximo as Tier 1 Agent Bill Sinclair. <u>Result</u>: Maximo displays the Start Center assigned to Bill Sinclair.
2	Open the **Incidents** application, then find and select the incident created from the SR submitted by user Tony Redding (status **NEW**) with the following description: **I cannot archive my e-mail xx (Duplicate).** <u>Note</u>: You cannot use the Work View to find and select this incident, because it has not yet been assigned. <u>Result</u>: The Incidents application opens with the selected incident. If you want, rewrite the incident # here: ________________.
3	Start the timer.
4	Enter the following information, then **save** the record: <u>**Field**</u> — <u>**Value**</u> **Internal Priority** — 3 **Service** — EMAIL **Site** — BEDFORD

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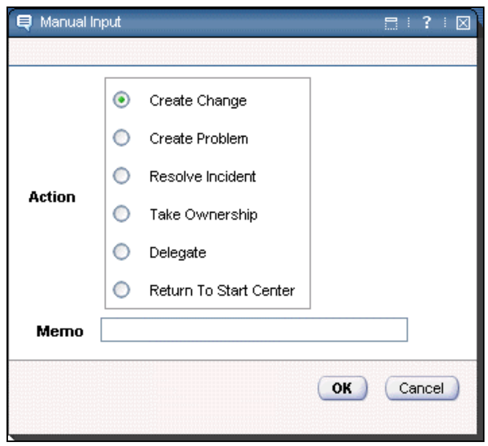
Modifying Incidents continued

Exercise: Modifying an Incident in Workflow

continued

Step	Action
5	Click the **Route Workflow** button . Result: A Workflow-produced Manual Input dialog box opens. 

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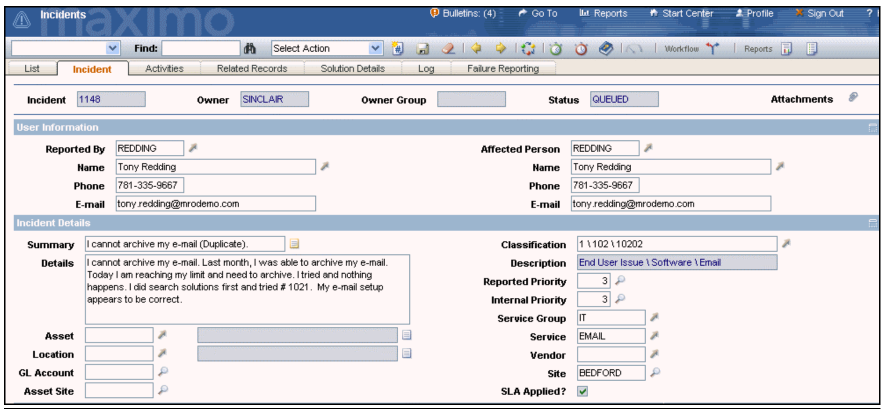
Modifying Incidents continued

Exercise: Modifying an Incident in Workflow

continued

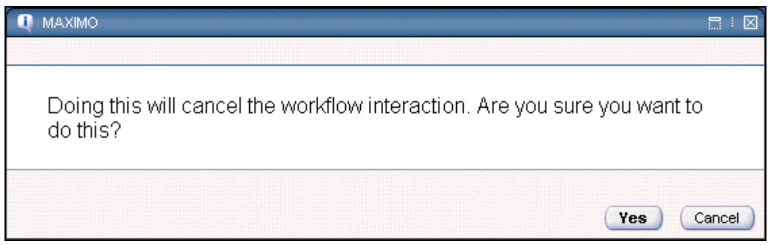
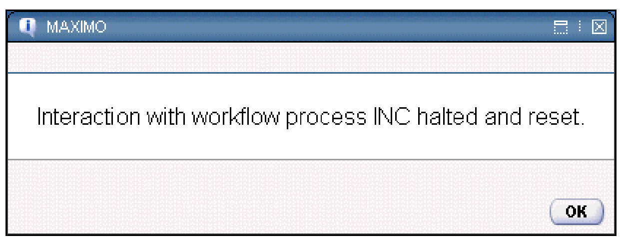
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>Ensure that the Take Ownership option is checked, then click OK.
<u>Result</u>: Two actions occurred as a result of Workflow:
• Ownership was applied to Bill Sinclair.
• The appropriate service level agreement (SLA) was applied.

</td></tr>
<tr><td>7</td><td>Change the status to In Progress.</td></tr>
<tr><td>8</td><td>Stop the timer, then click OK in the Confirm Timer dialog box.</td></tr>
</table>

continued on next page

Modifying Incidents continued

Exercise: Modifying an Incident in Workflow

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9</td><td> Save the record and return to the Start Center. <u>Result</u>: As in a previous exercise, you might get a message similar to the following:

</td></tr>
<tr><td>10</td><td> If you get this message, click Yes. <u>Result</u>: You are returned to the Start Center, and a Maximo message box opens.

</td></tr>
<tr><td>11</td><td>Click OK.</td></tr>
</table>

Discussion

What are the differences between managing an incident using Workflow vs. managing an incident manually?

What are the benefits of using Workflow?

How might this workflow be improved?

Managing Incident Communication

Introduction

Though business practices vary widely from one organization to another, it is considered a best practice for service desk agents to communicate the status of tickets with the originator.

Creating a Communication

You can use the **Create Communication** action in the Incidents application to send communications about a record to a requestor or other user.

When you create a communication, you can use a communication template to fill in default data. You can also create a free-form communication. If you use a template that uses substitution variables, then Maximo will fill in data from the template, such as the identifier, subject, and solution.

By using the Maximo escalation functionality, you can automate some of these types of communications.

For more information about communication templates, refer to the Communication Templates Help.

Exercise: Using a Communication Template

Scenario: A user, Tony Redding, cannot archive his e-mail. He submitted an SR. Tier 1 Service Desk Agent Bill Sinclair is working on the incident, and he will send a communication to the originator (Tony Redding) on the status of the ticket.

Earlier in this course, you created an incident communication template. You will use that template for communication.

Use the following steps.

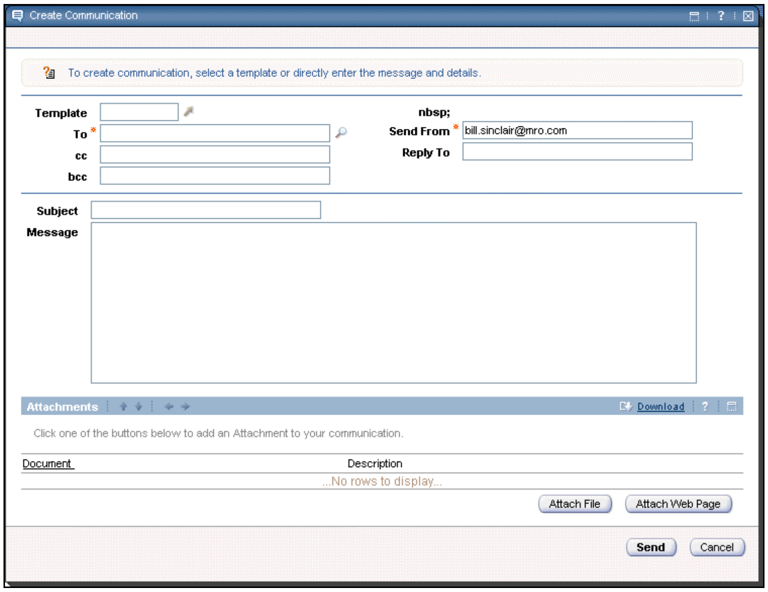
Step	Action
1	Sign in to Maximo as Tier 1 Agent Bill Sinclair. Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	Find and select the incident created from the SR submitted by user Tony Redding with the following description: **I cannot archive my e-mail xx.** Result: The Incidents application opens with the selected incident.

continued on next page

Managing Incident Communication continued

Exercise: Using a Communication Template

continued

Step	Action
3	Start the timer.
4	From the **Select Action** menu, choose **Create > Communication**. Result: The Create Communication dialog box opens. 

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Managing Incident Communication continued

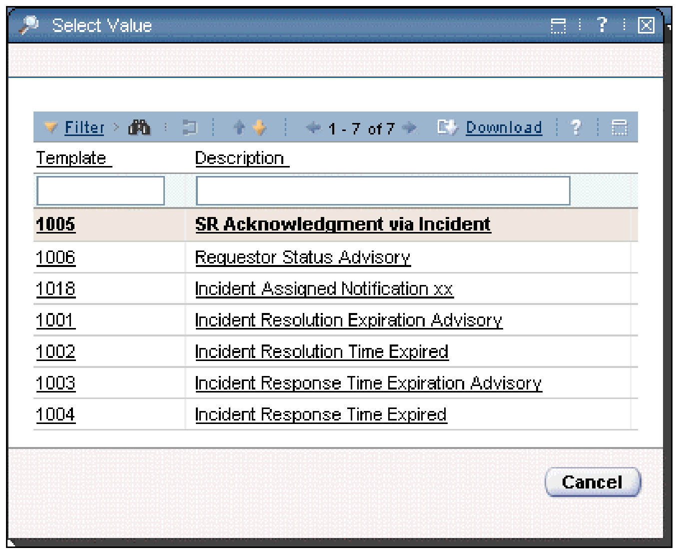
Exercise: Using a Communication Template

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>

From the **Template** field, click the **Detail Menu** button.

Result: The Select Value dialog box opens.



</td></tr>
</table>

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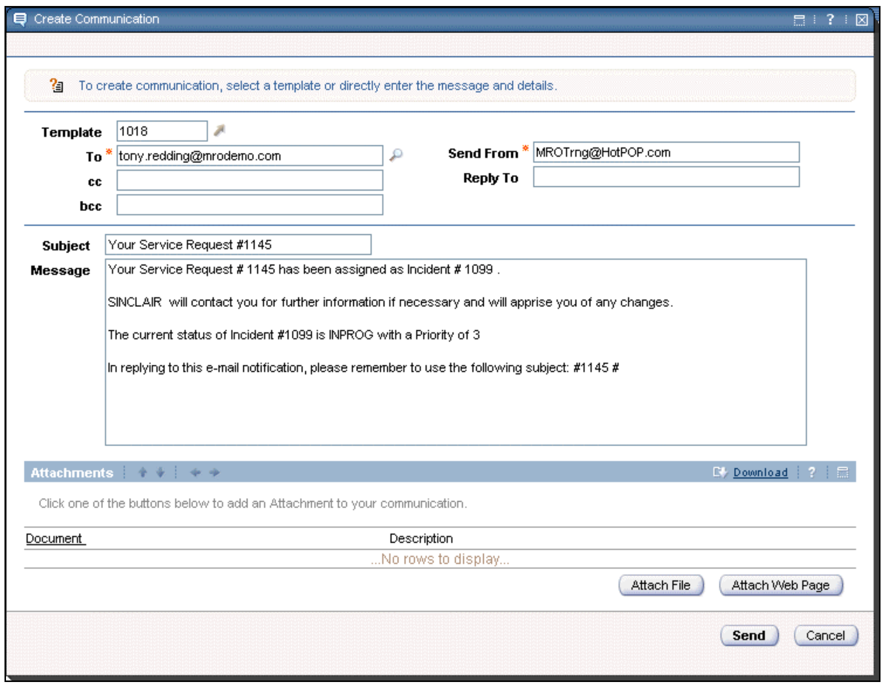
Managing Incident Communication continued

Exercise: Using a Communication Template continued

Step	Action
6	Click to select the **Incident Assigned Notification *xx*** that you created earlier in this course. Result: The Select Value dialog box closes, with the information from the selected template filled in on the Create Communication dialog box. 

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Managing Incident Communication continued

Exercise: Using a Communication Template

continued

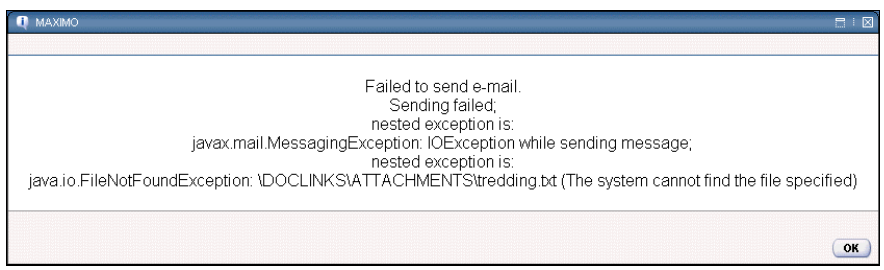
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>Review the communication and make any edits.

For training purposes, in the CC field, enter a valid e-mail address—one that you might have access to during this training.

<u>Note</u>: See the <u>Exercise Notes</u> that follow this exercise.</td></tr>
<tr><td>8</td><td>Click Send.

<u>Result</u>: The Create Communication dialog box closes and the Maximo menu bar briefly displays the following message:
<code>Communication has been sent.</code>

<u>Note</u>: If you get the following or a similar error message, click OK and see the Exercise Notes below!


</td></tr>
<tr><td>9</td><td>Stop the timer, save your record, and return to the Start Center.</td></tr>
</table>

Exercise Notes

The previous exercise is an e-mail–dependent exercise. To receive the communication sent as an e-mail, the following criteria *must* be met:

- Access to a mail server that allows both incoming and outgoing e-mail
- Access to the Internet with access to your e-mail account

Under these conditions, you will be able to receive the e-mail; otherwise, you will not be able to receive the created communication and you will get an error message similar to the one in the previous exercise.

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Managing Incident Communication continued

Exercise Result

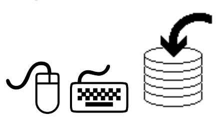
The communication you sent is received as an e-mail, similar to the following:

```
Your Service Request # 1145 has been assigned as
Incident # 1099. SINCLAIR will contact you for further
information if necessary and will apprise you of any
changes. The status of Incident #1099 is INPROG with a
Priority of 3. In replying to this e-mail notification,
please remember to use the following subject: #1145#.
```

The Communication Log

You use the Log tab in the Incidents application to view communication log entries. Communication log entries list all communications created from this record.

Exercise: Viewing the Communication Log



Scenario: A user, Tony Redding, cannot archive his e-mail. He submitted an SR. Tier 1 Service Desk Agent Bill Sinclair is working on the incident, and sent a communication to the originator (Tony Redding) on the status of his ticket.

Use the following steps to view the communication log.

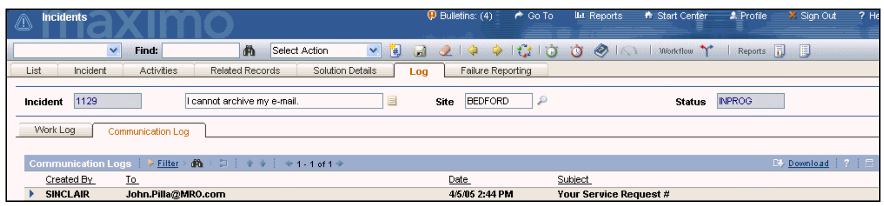
Step	Action
1	Sign in to Maximo as Tier 1 Agent Bill Sinclair. Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	Find and select the incident created from the SR submitted by user Tony Redding with the following description: **I cannot archive my e-mail *xx*.** Result: The Incidents application opens with the selected incident.
3	Start the timer.

continued on next page

Managing Incident Communication continued

Exercise: Viewing the Communication Log

continued

Step	Action
4	Open the **Log** tab and click on the **Communication Log** subtab. Result: The Communication Log subtab displays all communications. Note: Recall that this exercise is e-mail dependent. If the conditions are not met as stated earlier, then there might not be any entries for the Communication Log subtab. 
5	Click **View Details** to view the details of the communication you sent in the previous exercise.
6	When you are done, stop the timer and return to the **Start Center**.

The Work Log

Use the Work Log subtab to view work log entries, and to document work that needs to be done or that was done to resolve the issue. You can also provide or solicit information to help resolve the issue. Each log entry optionally can be made viewable to the client.

The Work Log subtab displays entries for the existing record, an originating record, and any follow-up records.

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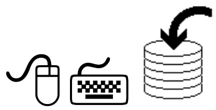
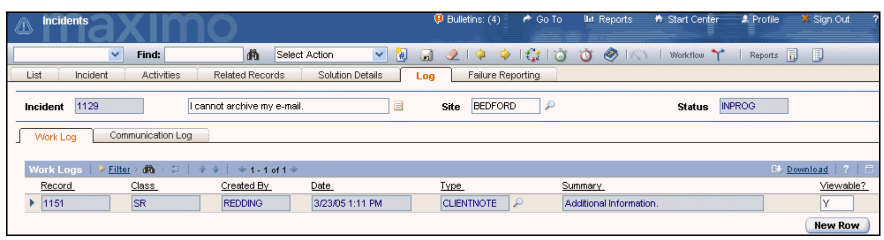
Managing Incident Communication continued

Exercise: Viewing the Work Log



Scenario: A user, Tony Redding, cannot archive his e-mail. He submitted an SR. Tier 1 Service Desk Agent Bill Sinclair is working on the incident, and will document work on this incident.

Use the following steps to view the work log.

Step	Action
1	Sign in to Maximo as Tier 1 Agent Bill Sinclair. Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	Find and select the incident created from the SR submitted by user Tony Redding with the following description: **I cannot archive my e-mail *xx*.** Result: The Incidents application opens with the selected incident.
3	Start the timer.
4	Open the **Log** tab and select the **Work Log** subtab. Result: The Work Log subtab displays all entries. Notice that the follow-up to the SR that you as user Tony Redding sent earlier in this course is displayed. 
5	Click **View Details** to view the details of the work log entry.
6	Read the details of the work log.
7	When you are done, stop the timer, **save** the record, and return to the **Start Center**.

continued on next page

Managing Incident Communication continued

Researching Possible Solutions

Not all solutions are available to end users through Self-Service. After a service desk agent logs a call, they should search through the Solutions application for a solution that might not have been available to the user.

A solution record contains information on identifying and resolving an incident. Finding and attaching existing solution information to an incident can help you resolve issues efficiently. Solution records can contain information on the symptom, cause, and resolution related to an issue. If you cannot find an applicable solution, but determine one for this issue, you can document it on the record and submit it for possible inclusion in the solution catalog.

For more information, see the Solutions application help and search for "Similar Tickets/Global Tickets."

Exercise: Searching Solutions Not Available to Self-Service Users

Scenario: A user, Tony Redding, cannot archive his e-mail. He submitted an SR. Tier 1 Service Desk Agent Bill Sinclair is working on the incident. Because not all solutions are available to Self-Service users, Bill Sinclair will search through the Solutions Knowledge Base.

A solution record contains information on resolving an incident or a problem. Finding and attaching existing solution information to an incident or a problem can help you resolve issues efficiently. Solution records can contain information on the symptom, cause, and resolution.

Use the following steps to search for and apply an appropriate solution.

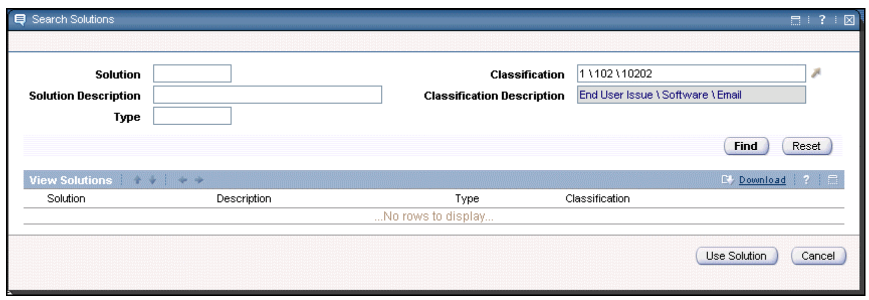
Step	Action
1	Sign in to Maximo as Tier 1 Agent Bill Sinclair. Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	Find and select the incident created from the SR submitted by user Tony Redding with the following description: **I cannot archive my e-mail *xx*.** Result: The Incidents application opens with the selected incident.
3	Start the timer.

continued on next page

Managing Incident Communication continued

Exercise: Searching Solutions Not Available to Self-Service Users

continued

Step	Action
4	In the Maximo toolbar, click the **Search Solutions** icon  to display the **Search Solutions** dialog box. Result: The Search Solutions dialog box opens. 
5	In the **Solution Description** field, enter e-mail and click **Find**. Result: Maximo displays no results.
6	**STOP!** Do not go any further until told to do so by your instructor.

Discussion

Discuss why you might have returned no results from your solutions query.

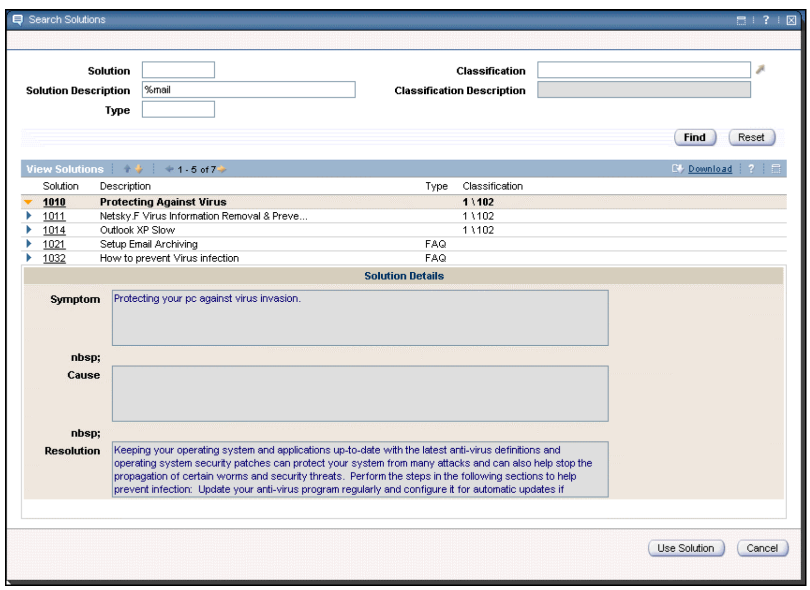
Note: Your organization should employ some best practices regarding the Solutions Knowledge Base.

continued on next page

Managing Incident Communication continued

Exercise: Continue Searching for a Solution

Keep searching for a suitable solution by continuing the previous exercise using the following steps.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Ensure that you have the Search Solutions dialog box open from the previous exercise.</td></tr>
<tr><td>2</td><td>Clear the Classification field, and press the Tab key to clear the subsequent Classification Description field.</td></tr>
<tr><td>3</td><td>Enter %mail in the Solution Description field, then click Find.
<u>Result</u>: Maximo displays several results, similar to the following graphic.
<u>Note</u>: Your results might differ from those shown here.

</td></tr>
</table>

continued on next page

Managing Incident Communication continued

Exercise: Continue Searching for a Solution

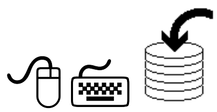
continued

Step	Action
4	Click **View Details** for solution **1021,** Setup Email Archiving. Result: Although this appears to be the only solution in the Maximo Solutions Knowledge Base closely related to the reported problem, the user (Tony Redding) reported that he looked at and tried this solution, and that it did not help. Best Practice: You should encourage users to report solutions that they have tried before submitting their SR. Best Practice: Though we will not go through it here, you might consider requiring service desk agents to walk through the steps of a solution the user might have already tried, just to ensure that the user followed the steps correctly.
5	Click **Cancel**. Result: The Search Solutions dialog box closes.
6	Stop the timer.
7	Return to the **Start Center**.

continued on next page

Managing Incident Communication continued

Exercise: Creating a Work Log Entry



Scenario: A user, Tony Redding, cannot archive his e-mail. He submitted an SR. Tier 1 Service Desk Agent Bill Sinclair is working on the incident, and will document work on this incident. Tier 1 Service Desk Agent Bill Sinclair did not find any relevant solutions in the Maximo Solutions Knowledge Base. However, after he read the work log entry submitted by user Tony Redding, he has a clearer idea of what might be going on.

Tony Redding's e-mail program requires a *.txt e-mail archive file to be located on his local drive in a specific directory. After calling the user to confirm, Bill Sinclair knew how to resolve the incident, and needs to document it in a work log entry.

Use the following steps to enter a work log entry.

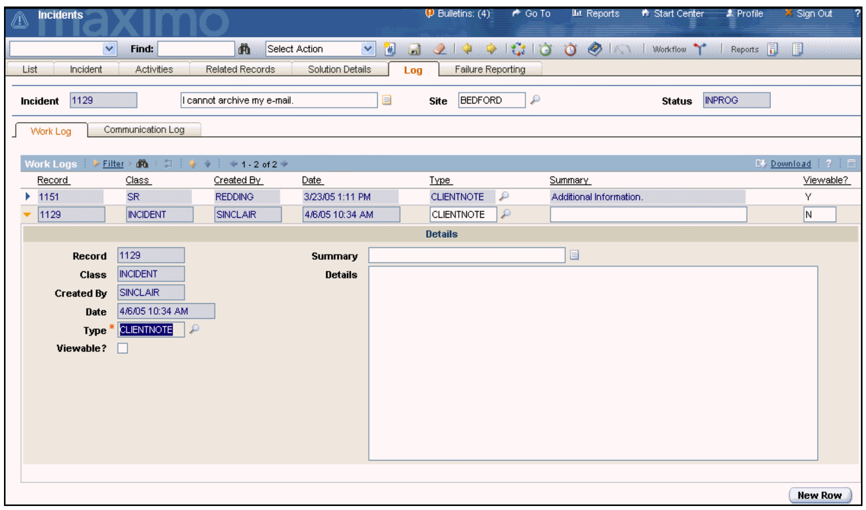
Step	Action
1	Sign in to Maximo as Tier 1 Agent Bill Sinclair. Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	Find and select the incident created from the SR submitted by user Tony Redding with the following description: **I cannot archive my e-mail *xx*.** Result: The Incidents application opens with the selected incident.
3	Start the timer.
4	Open the **Log** tab and select the **Work Log** subtab. Result: The Work Log subtab displays all entries.

continued on next page

Managing Incident Communication continued

Exercise: Creating a Work Log Entry

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Click New Row.
<u>Result</u>: A new row opens for data entry.

</td></tr>
</table>

continued on next page

Managing Incident Communication continued

Exercise: Creating a Work Log Entry

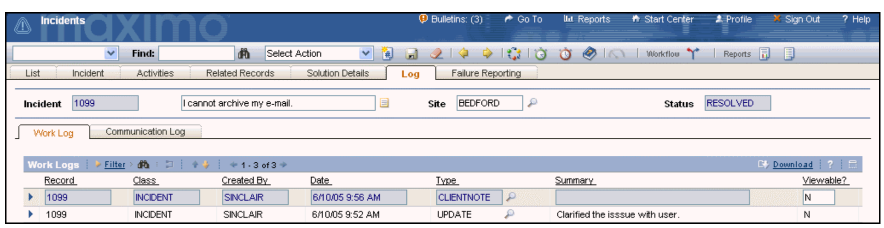
continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>Enter the following information:

<u>Field</u> — <u>Value</u>
Type — UPDATE
Viewable? — [Unchecked]
Summary — Clarified the issue with the user.
Details — Per the user's updated note sent through Self-Service, he reported that an error displayed, "Cannot find file...".

User had deleted his Archive *.dbf file. E-mailed user his archive.dbf file recovered off the network backup. Instructed user where to place the file, and asked user to test his e-mail archiving functionality.</td></tr>
<tr><td>7</td><td>Stop the timer and save the record.

<u>Result</u>: Your work log should look similar to this one.


</td></tr>
<tr><td>8</td><td>Return to the Start Center.</td></tr>
</table>

continued on next page

Managing Incident Communication continued

Prerequisite Exercise

Scenario: In this prerequisite exercise, you will create a simple text file using Windows Notepad so you can simulate attaching a file in the next exercise.

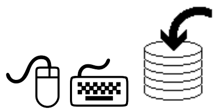
Note: In order for the exercise that follows this prerequisite exercise to work, the Attached Documents functionality must be set up and working in your training environment. Ask your instructor if you are unsure.

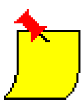
Step	Action
1	Using **Windows Explorer**, find and select the **C:\DOCLINKS\Attached** folder. Note: This file does not necessarily have to be in the Attached Documents (DOCLINKS) path.
2	While in the folder's contents, right-click and choose **New > Text Document**. Result: A new file is created.
3	Right-click on the new file and choose **Rename**. Result: The file name is highlighted, ready for editing.
4	Rename the file by entering tredding.txt, then press **Enter**. Result: Your new desktop file changes its name.
5	Open the new **tredding.txt** file, enter any text, **save** the file, and then close the file. Example text: This text represents a simulation of TRedding's backed-up e-mail archive data.

continued on next page

Managing Incident Communication continued

Exercise: Creating a Free-Form Communication with a File Attachment





Scenario: A user, Tony Redding, cannot archive his e-mail. He submitted an SR. Tier 1 Service Desk Agent Bill Sinclair is working on the incident, and documented his work on this incident. After Tier 1 Service Desk Agent Bill Sinclair worked with user Tony Redding, he came up with a solution and created a work log entry. Using Create Communication (from the select action menu), Bill Sinclair will send Tony Redding a free-form communication with an attached file to fix his problem. Use the following steps.

Note 1: Although a later exercise that requires this exercise is e-mail dependent, you will be able to complete *this* exercise even if e-mail functionality is not set up in your training environment.

Note 2: Successful completion of this exercise requires the Maximo Attached Documents functionality to be set up in your training environment. However, even if it is not, you should still perform all of the steps *except* for attaching a file.

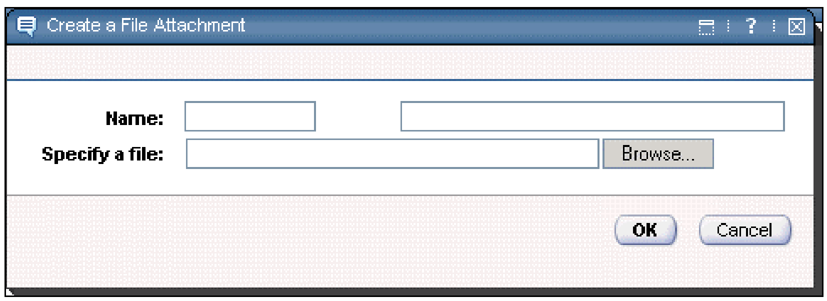
Step	Action
1	Sign in to Maximo as Tier 1 Agent Bill Sinclair. Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	Find and select the incident created from the SR submitted by user Tony Redding with the following description: **I cannot archive my e-mail *xx*.** Result: The Incidents application opens with the selected incident.
3	Start the timer.
4	From the **Select Action** menu, choose **Create > Communication**. Result: The Create Communication dialog box opens.
5 	In the **To** field, enter a valid e-mail address—one that you might have access to during this training. Write the e-mail address here: ______________________________. Note: See the Exercise Notes that follow this exercise.
6	In the **Subject** field, enter the following text: Your backed-up e-mail archive file.

continued on next page

Managing Incident Communication continued

Exercise: Creating a Free-Form Communication with a File Attachment

continued

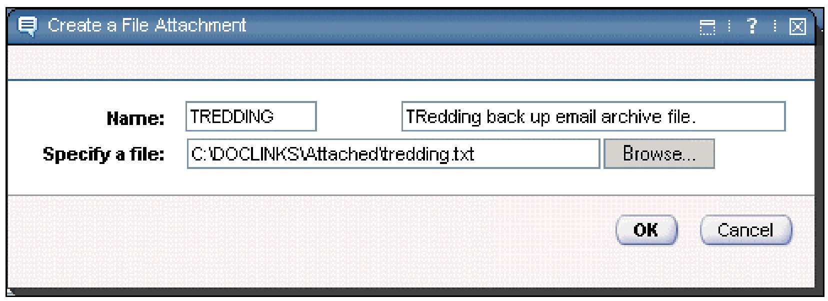
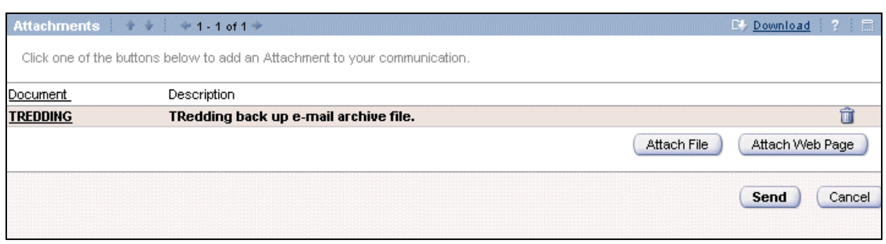
Step	Action
7	In the **Message** field, enter the following text: As we discussed per our telecon, regarding your SR [*enter SR number*], attached is your backed-up e-mail archive file tredding.txt. Please save this file in the c:\email\archive folder.
8	Click **Attach File**. Result: The Create a File Attachment dialog box opens. 
9	Click **Browse**. Result: A Windows Choose File dialog box opens.
10	Search for and select the **tredding.txt** file that you created in the prerequisite exercise. Hint: It should be in the following path: **C:\DOCLINKS\Attached\tredding.txt**
11	In the **Name** field, enter TREDDING.

continued on next page

Managing Incident Communication continued

Exercise: Creating a Free-Form Communication with a File Attachment

continued

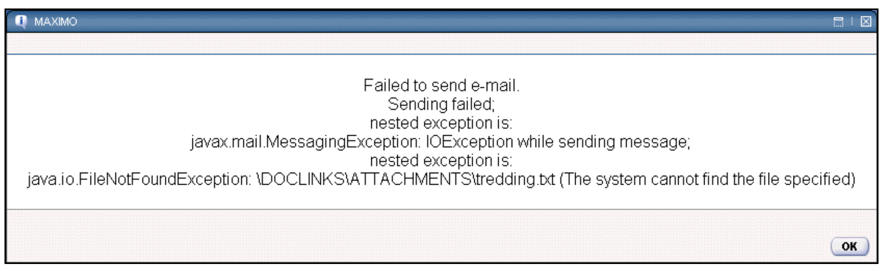
Step	Action
12	In the **Description** field, enter TRedding backup e-mail archive file. Result: Your display should look similar to this: 
13	Click **OK**. Result: The Create a File Attachment dialog box closes, and the Attachments frame of the Create Communication dialog box displays your attached file. 

continued on next page

Managing Incident Communication continued

Exercise: Creating a Free-Form Communication with a File Attachment

continued

Step	Action
14	Click **Send**. Result: The Create Communication dialog box closes and the Maximo menu bar briefly displays the following message: `Communication has been sent.` Note: If you get the following or similar error message, click **OK**. The Maximo Attached Documents functionality has not been set up or has not been set up properly in your training environment. 
15	Stop the timer, and **save** your record.
16	Return to the **Start Center**.

continued on next page

Managing Incident Communication continued

Exercise: Revisiting the Communication Log

Scenario: A user, Tony Redding, cannot archive his e-mail. He submitted an SR. Tier 1 Service Desk Agent Bill Sinclair is working on the incident, and documented his work on this incident. Bill Sinclair sent user Tony Redding a free-form communication with an attached file to fix his problem. Use the following steps to view the communication.

Step	Action
1	Sign in to Maximo as Tier 1 Agent Bill Sinclair. Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	Find and select the incident created from the SR submitted by user Tony Redding with the following description: **I cannot archive my e-mail xx.** Result: The Incidents application opens with the selected incident.
3	Start the timer.
4	Open the **Log** tab and click on the **Communication Log** subtab. Result: The Communication Log subtab displays all communications. Note: Recall that this exercise is e-mail dependent. If the conditions are not met as stated earlier, then there might not be any entries for the Communication Log subtab.
5	Click **View Details** to view the details of the communication you sent in the previous exercise.
6	When you are done, stop the timer and return to the **Start Center**.

continued on next page

Managing Incident Communication continued

Exercise Notes

This next [optional] exercise is e-mail dependent, and it will not work if the criteria listed below are not met.

Note: To receive the e-mail communication that you just sent, the following criteria *must* exist in your training environment:

- This exercise requires access to an e-mail server that allows both incoming and outgoing e-mail.
- This exercise requires access to the e-mail account for the e-mail address that you used in the previous exercise.

Given these conditions, you will be able to receive the communication in an e-mail; otherwise, the exercise will not work in your training environment.

Optional Exercise: Checking Your Results

Scenario: A user, Tony Redding, cannot archive his e-mail. He submitted an SR. Tier 1 Service Desk Agent Bill Sinclair is working on the incident, and documented his work on this incident. Bill Sinclair sent Tony Redding a free-form communication with an attached file to fix his problem. Tony Redding will open his e-mail, follow the instructions, and apply the fix. Use the following steps.

Note: This exercise is written in general terms. The specific steps for you depend on your e-mail program.

Step	Action
1	Open the e-mail account that you used for the **To** field in a previous exercise: *Creating a Free-Form Communication with a File Attachment, step 5 on page 5-41*.

continued on next page

Managing Incident Communication continued

Optional Exercise: Checking Your Results

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>Find and open the e-mail from Bill Sinclair.

<u>Result</u>: The following graphic is an example only. This screen shot was taken from an e-mail in a Lotus Notes client.

<u>Note</u>: The actual content of the message depicted here might not exactly match the message you entered in an exercise earlier in this course.


</td></tr>
<tr><td>3</td><td>This step is informational only. No action needs to be taken in this step. If this were a real service desk problem, Tony Redding would follow the instructions in the e-mail: saving the attached file to the proper location.

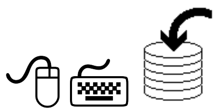
Then he would test his e-mail archiving capability.</td></tr>
<tr><td>4</td><td>Close your e-mail account.</td></tr>
</table>

Resolving Incidents

Introduction

Because the overall goal of incident management is to restore service, the resolution of incidents occurs when that service is effectively restored. The actual process of resolving incidents might include one or several steps. Regardless of the steps that are specified in your organization as part of the resolution process, incident resolution is part of the incident management process.

Exercise: Creating a Solution for This Incident



Scenario: A user, Tony Redding, cannot archive his e-mail. He submitted an SR. Tier 1 Service Desk Agent Bill Sinclair is working on the incident. After communicating with Tony Redding, Bill Sinclair clearly knew how to restore Tony Redding's e-mail archiving capability. Because no existing solutions were applicable, Bill Sinclair will create a new solution, specific to this incident.

Use the following steps to create a new solution for this specific incident.

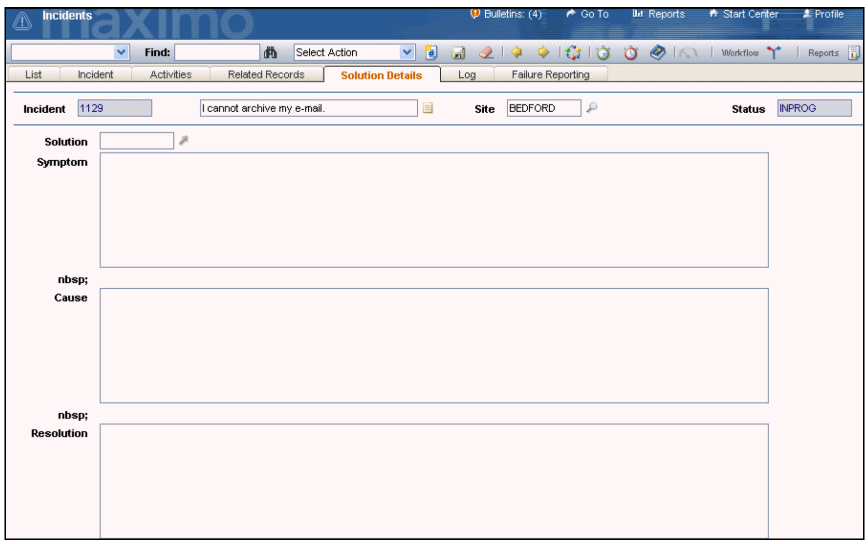
Step	Action
1	Sign in to Maximo as Tier 1 Agent Bill Sinclair. Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	Find and select the incident created from the SR submitted by user Tony Redding with the following description: **I cannot archive my e-mail *xx*.** Result: The Incidents application opens with the selected incident.
3	Start the timer.

continued on next page

Resolving Incidents continued

Exercise: Creating a Solution for This Incident

continued

Step	Action
4	Click the **Solution Details** tab. Result: The Solution Details tab opens ready for editing. 

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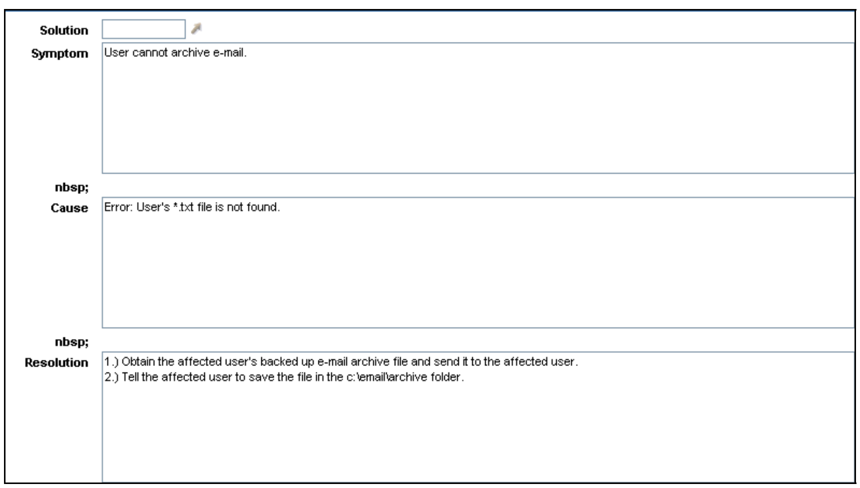
Resolving Incidents continued

Exercise: Creating a Solution for This Incident

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Enter the following information:
<table>
<tr><th>Field</th><th>Value</th></tr>
<tr><td>Solution</td><td>[Leave this field blank at this time.]</td></tr>
<tr><td>Symptom</td><td>User xx cannot archive e-mail.</td></tr>
<tr><td>Cause</td><td>Error: User’s archive.dbf file is not found.</td></tr>
</table>
Resolution
1.) Obtain the affected user’s backed-up e-mail archive file and send it to the affected user.
2.) Tell the affected user to save the file in the c:\email\archive folder.
<u>Result</u>: Your solution should look similar to this.


</td></tr>
<tr><td>6</td><td>Stop the timer, save the record, and return to the Start Center.</td></tr>
</table>

continued on next page

Resolving Incidents continued

Solutions for General Use

If you do not see an appropriate solution for a specific incident, you can create solution information for this incident record. Optionally, if no existing solution records are appropriate, you can create and submit a draft solution for inclusion in the solutions database in order to share the newly created solution with other agents.

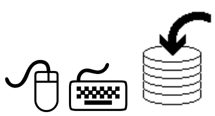
Maximo uses the information entered on the Solution Details tab of a specific incident to create a solution record having a status of DRAFT.

Best Practice: You should create a Workflow process to route draft solutions to the solutions database manager for review.

Maximo displays a message confirming that the solution has been created.

By default, this record will be available to Self-Service users when (if) it is approved. An administrator approves solutions for general use.

Exercise: Creating Solutions for General Use



Scenario: A user, Tony Redding, cannot archive his e-mail. He submitted an SR. Tier 1 Service Desk Agent Bill Sinclair is working on the incident. Bill Sinclair created a solution specific to this incident; now he will submit this solution for general use.

Use the following steps to submit a solution.

Step	Action
1	Sign in to Maximo as Tier 1 Agent Bill Sinclair. Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	Find and select the incident created from the SR submitted by user Tony Redding with the following description: **I cannot archive my e-mail *xx*.** Result: The Incidents application opens with the selected incident.
3	Start the timer.

continued on next page

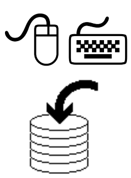
Resolving Incidents continued

Exercise: Creating Solutions for General Use

continued

Step	Action
4	From the **Select Action** menu, choose **Create > Solution**. Result: Maximo creates a new DRAFT solution and *briefly* displays a message that a new solution has been created. Write down your new solution number here: __________________.
5	Stop the timer and return to the **Start Center**. Note: We will look at the Solutions application later in this course.

Exercise: Resolving an Incident



After service is restored to the user, the incident can be changed to a status of Resolved. Moreover, because of status inheritance, the status of the originating SR is also changed.

Scenario: A user, Tony Redding, could not archive his e-mail. He submitted an SR. Tier 1 Service Desk Agent Bill Sinclair worked on the incident. He created a solution specific to this incident, and communicated it to the originating user, Tony Redding. Now, Bill Sinclair can identify this incident as resolved.

Use the following steps to resolve this incident.

Step	Action
1	Sign in to Maximo as Tier 1 Service Desk Agent Bill Sinclair. Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	Find and select the incident created from the SR submitted by user Tony Redding with the following description: **I cannot archive my e-mail *xx*.** Result: The Incidents application opens with the selected incident.
3	Select the **Related** records tab. What is the status of the originating SR? _____________________.

continued on next page

Resolving Incidents continued

Exercise: Resolving an Incident

continued

Step	Action
4	Change the status of this incident to **RESOLVED**. What is the status of the originating SR now? ________________
5	Return to the **Start Center**.

Closing Incidents

We will not close this incident at this time.

Best Practice: A best practice is to use the Maximo Workflow application and/or its Escalations functionality to communicate an incident summary to the customer that includes the solution details and states that the incident will be closed in *X* days, and also to change the status of an incident to CLOSE (Closed) after the specified number of days have passed (such as 7). That way, if no further follow-up communication is sent/received from the originator regarding this same SR, all related tickets will automatically close.

Chapter Summary

Incident Management: Overview	The goal of incident management is to restore normal service operation as quickly as possible with minimum disruption to the business, thus ensuring that the best achievable levels of availability and service are maintained.
Creating Incidents	Incidents can be created from several sources. Typically, service desk agents create incidents from SRs.
Incident Ownership	The owner of an incident is responsible for managing the work associated with that incident. You can either select an owner of an incident or take ownership yourself.
Modifying Incidents	Use the Incidents application to create and modify incident records. You create an incident record to capture information about an event that deviates from standard service or an event that might disrupt the quality of that service. End users might or might not be aware of the event.
Managing Incident Communication	You can use the Create Communication action in the Incidents application to send communications about a record to a requestor or other user. When you create a communication, you can use a communication template to fill in default data. You can also create a free-form communication. If you use a template, Maximo will fill in data from the template, such as the identifier, subject, and solution.
Resolving Incidents	Because the overall goal of incident management is to restore service, the resolution of incidents occurs when that service is effectively restored. The actual process of resolving incidents can include one or several steps. However it is described, incident resolution is part of the incident management process.

Workshop

Scenario

Earlier in this chapter, you started working on an SR (Duplicate) from user Tony Redding, with the following description:

I cannot archive my e-mail xx (Duplicate).

This incident differed from the original only in that we started to process this one using Workflow.

Discussion

What steps need to be done on this incident in order to resolve it?

Workshop Exercise: Resolve This Incident

Using Workflow where applicable, resolve this incident using similar communications and the same solution you used for the original incident.

The last status of this incident was set to INPROG (In Progress) when Tier 1 Service Desk Agent Bill Sinclair took ownership of this incident.

You can pick up this incident and finish processing it from **Exercise: Modifying an Incident in Workflow** starting on page **5-21**.

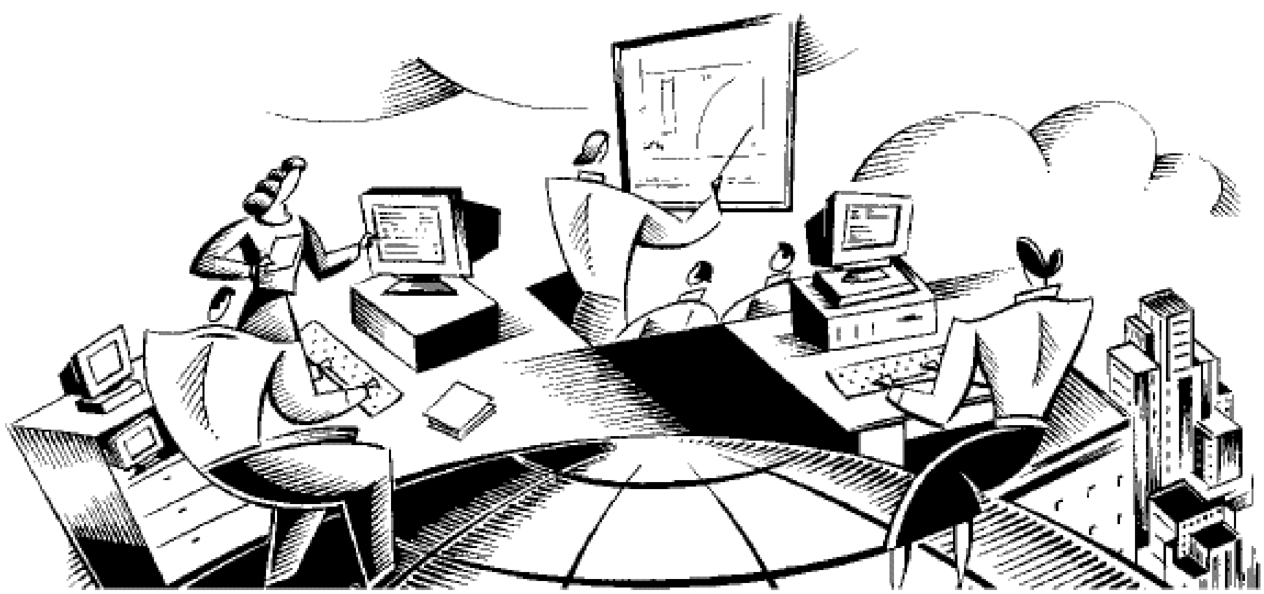
Discussion

Now that you have resolved this incident using the Workflow process included with the *maxdemo* training database, discuss the following:

- How can this Workflow process be improved?
- How would you design a Workflow process for this scenario?
- How would your Workflow process support the ITIL framework?

NOTES:

Chapter 6: Incident Management—Additional Concepts



In This Chapter

This chapter contains the following topics:

Chapter Overview

Introduction

This chapter continues where the last chapter left off, covering additional topics in the incident management process.

Chapter Focus

The focus of this chapter is to use two additional scenarios in order to give you practical experience on additional concepts in using Maximo to manage incidents.

Learning Objectives

When you have completed this chapter, you should be able to:

- Escalate an incident to tier 2
- Delegate an incident to a functional group
- Create a solution for an escalated incident
- Resolve an escalated incident
- Approve solutions for inclusion in the Maximo Solutions Knowledge Base
- Search for, find, and use the new solution
- Create activities for an incident
- Assign an incident's activities
- Complete an incident's activity
- Resolve an incident with activities
- Create a problem ticket from an incident

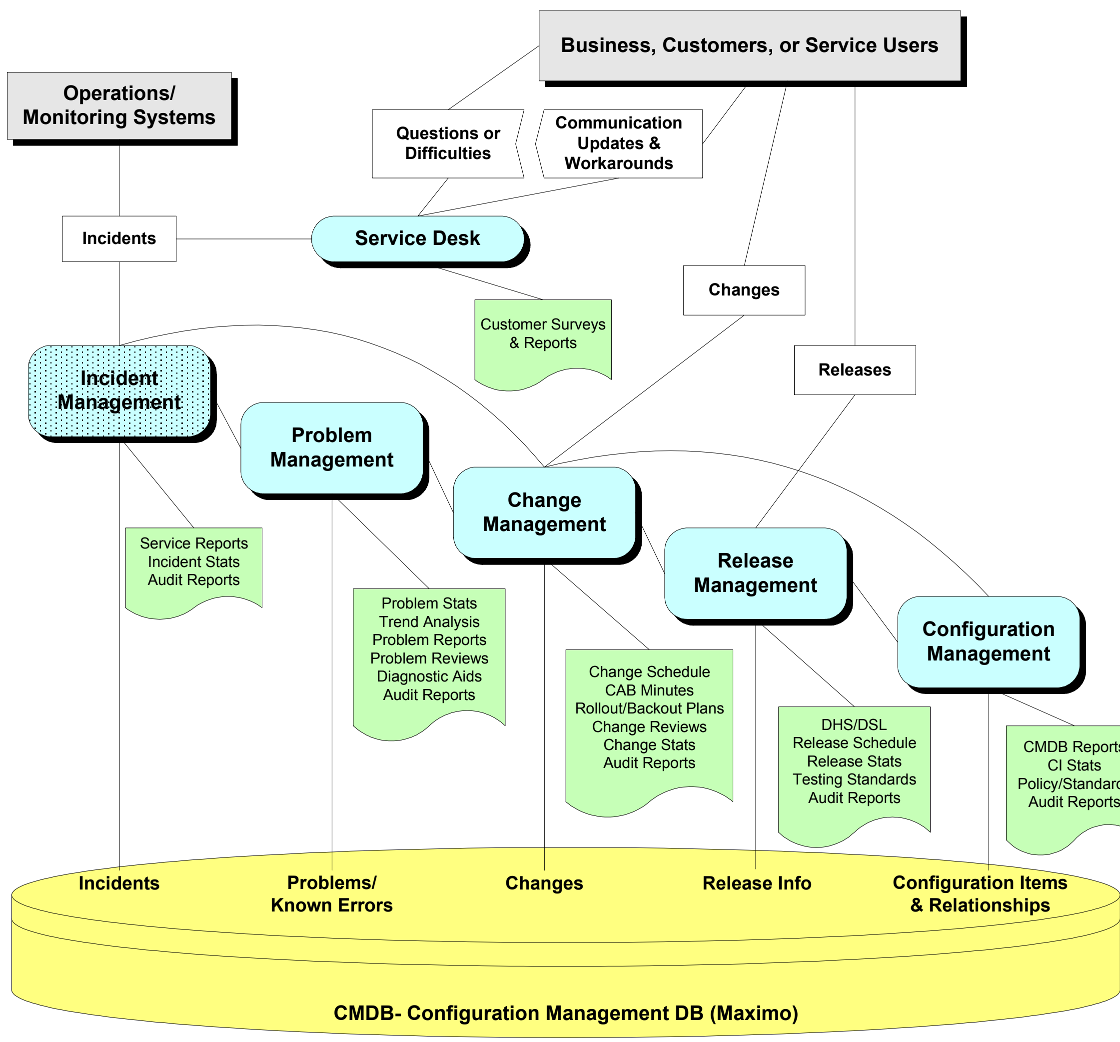
Incident Management: Revisited

Introduction

In the previous chapter we went through a scenario of incident management from the creation of an SR until the resolution of that incident. In this chapter we will build on that knowledge, but first let's review the incident management process.

You Are Here

Recall this diagram depicting the various IT Service Management processes. Notice the dotted background for Incident Management. Throughout this chapter, we will be discussing the incident management process in Maximo.



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Incident Management: Revisited continued

Definition

An *incident* is any event that is not part of the standard operation of a service and that causes or might cause an interruption to or a reduction in the quality of that service.

Responsibilities

The actual roles and responsibilities of incident management will depend on the procedures that your organization has put into place. These could include:

- Incident detection and recording
- Classification of all incidents, and initial support
- Investigation and diagnosis
- Resolution and recovery
- Incident closure
- Incident ownership, monitoring, tracking, and communication

Sources

Sources of incidents include:

- Users (Self-Service requests, e-mail, phone, walk-in, fax)
- Operations
- Network Management – monitoring tools
- System Management – monitoring tools

continued on next page

Incident Management: Revisited continued

Incident Statuses in Maximo

The status of an incident changes as it moves toward completion. The following information describes the default statuses for incidents. Your system administrator might have added, removed, or changed the names of these supplied statuses.

Status	Description
NEW	Applies when you create or insert an incident. You cannot revert to this status after you change it.
QUEUED	Applies when incident ownership is given to a person or a group. Ownership assignment can be made manually or can be made automatically via Workflow, an associated SLA escalation action, or other escalation process. For more information, see the Workflow Help or the Service Level Agreements Help, respectively.
INPROG	In progress. Applies when someone is working on this incident. The first time an incident reaches this status, Maximo populates the Actual Start field, if it is empty.
PENDING	Applies when an incident is pending an action (for example, vendor or user callback, or waiting for parts).
RESOLVED	Applies when information has been gathered and routed, service has been restored, or a solution has been provided. The first time an incident reaches this status, Maximo populates the Actual Finish field, if it is empty. If necessary, you can reopen an incident and change the status from RESOLVED to INPROG (in progress).
CLOSE	Closed. Applies when an incident becomes a historical record. When a record is closed, you cannot change the status. You can, however, edit certain parts of the history record.

Summary

The goal of incident management is to restore normal service operation as quickly as possible. Throughout this chapter, you will learn how Maximo supports the incident management process.

The service desk usually plays the key role in the incident management process: recording and monitoring the progress of incidents.

Scenarios

Introduction

In an earlier chapter, we created several SRs through various methods. Two of those SRs are part of the following two scenarios. Through these two scenarios, and a third new scenario, you will gain a deeper understanding of how Maximo supports the ITIL framework. Specifically, in this chapter you will learn additional concepts on incident management and see how Maximo supports these concepts.

Scenario: Incident Escalated to Tier 2

Scenario (Continued from previous chapter[s]): Recall that user Javier Ramirez could not connect to his company's local area network (LAN). He could not use the Maximo Self-Service Service Desk; however, he used his company's service desk's 800 number. Tier 1 Service Desk Agent Bill Sinclair answered the phone and created an SR on his behalf.

The resolution of this incident requires a Tier 1 service desk agent to escalate the incident to Tier 2, the IT network group. A Tier 2 agent from the IT network group will resolve the incident, create a solution, and submit the resolution for inclusion in the Solutions Knowledge Base. A service desk manager will review the drafted solution, approve it, and activate the solution as part of the Solutions Knowledge Base.

For easier reference, go back to Chapter 4, find the exercise **Receiving an SR via Telephone**, and write your SR # here: ____________________.

Scenario: Incident with Activities

Scenario (New): User Javier Ramirez appears not to be receiving any e-mail. Tier 1 Service Desk Agent Bill Sinclair will receive the SR, create the incident, apply two activities to the incident, and route each activity to the applicable Tier 3 group. The two activities for this exercise are: Check the e-mail server (network group) and check the user's e-mail limits (e-mail group).

Each of the two Tier 3 agents assigned to one each of the two activities will work their assigned activity, use communication, resolve the activity, and complete their assigned activity.

After Tier 1 Service Desk Agent Bill Sinclair receives notification that the activities are complete, he will verify their completion, resolve the incident, and create a communication to the originating user (Javier Ramirez).

continued on next page

Scenarios continued

Scenario: Incident Generates a Problem

Scenario (Continued from previous chapter[s]): Recall that user Henry Lowe submitted an SR to the service desk via e-mail that his hard drive was making a funny noise. Tier 1 Agent Bill Sinclair received and reviewed the SR.

Note: Recall that your environment might not include the elements required for e-mail to function. Therefore, you would have simulated an SR submitted by e-mail using the Alternative instructions.

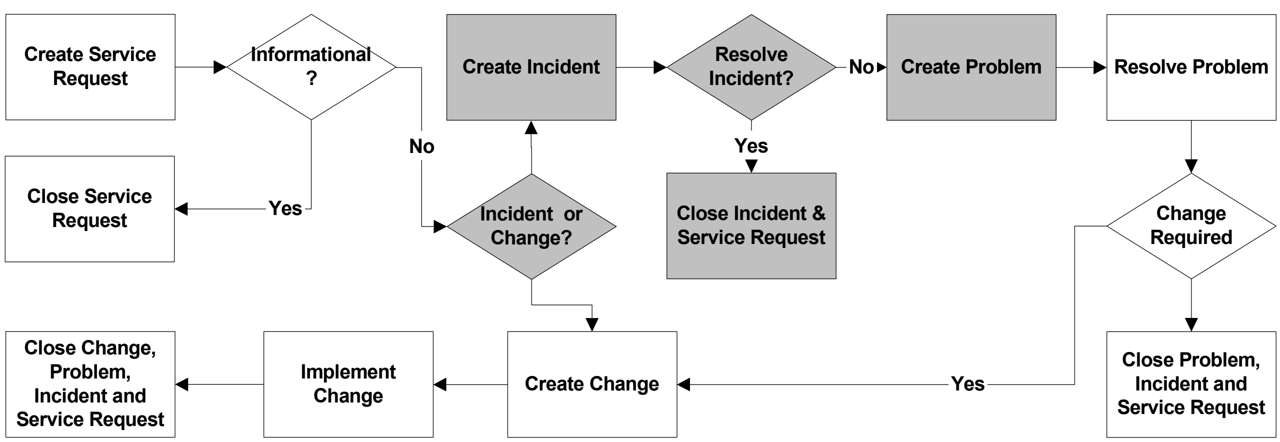
From the incident, the Tier 3 hardware group agent will create a problem ticket. From that, a change will be submitted to replace the user's hard drive. Because the goal of incident management is to restore service, a new hard drive will be installed in the user's laptop. This requires you to add several activities to the incident and identify failure reporting, and it also requires a configuration change.

Because this chapter focuses on incident management, some of these concepts are addressed by continuing this scenario in a succeeding chapter.

For easier reference, go back to Chapter 4, find the exercise **View an SR Submitted via E-mail**, and write your SR # here: ___________________.

Ticket Process Flow

The following typical ticket process flow continues from the previous chapter, depicting incidents that we will be continuing in this chapter.



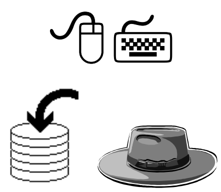
Incident Escalation

Introduction

Tier 1 service desk agents might not be trained to resolve all incidents. Some incidents need to be escalated to a Tier 2 agent or a Tier 2 (or 3) specialty group.

Your organization might have a person or persons designated to support different functions, all supporting the service desk. Some examples might include networks, e-mail, printing, applications, telecommunications, and PC support.

Exercise: Create and Escalate the Incident



Scenario: User Javier Ramirez could not connect to his company's local area network (LAN). He could not use the Maximo Self-Service Service Desk; however, he used his company's service desk's 800 number. Tier 1 Service Desk Agent Bill Sinclair answered the phone and created an SR on his behalf. As Bill Sinclair, you will review/modify the SR, create the incident, and escalate it to the IT network group.

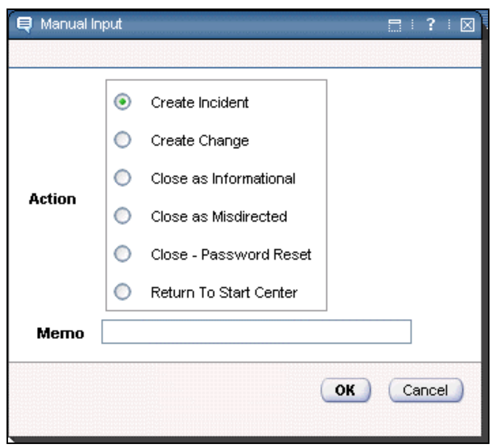
Use the following steps.

Step	Action
1	Sign in to Maximo as Tier 1 Service Desk Agent Bill Sinclair. Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	Open the **Service Requests** application. Note: You cannot use the Work View Result Set on the Start Center to find this ticket, because result sets filter by OWNER and this SR has not yet been assigned.
3	Find and select the SR from Javier Ramirez: **User *xx* cannot connect to the network.** Hint: You created this SR in a previous chapter, and wrote down the SR number. The status is NEW. Result: Maximo displays the SR. For reference, write the SR # here: ____________________.

continued on next page

Incident Escalation continued

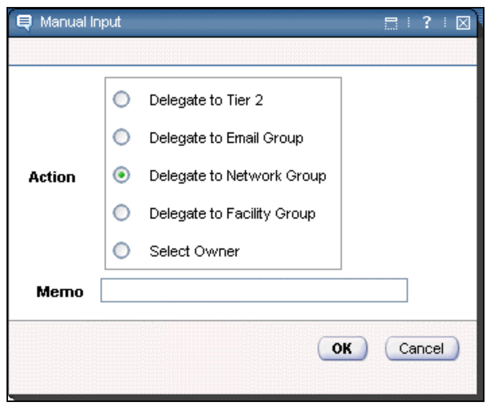
Exercise: Create and Escalate the Incident continued

Step	Action
4	In the **Service** field, click the **Detail Menu** button and choose **Select Value**. Result: The Select Value dialog box opens.
5	Find and select **NETWORK** (Network Support). Result: NETWORK populates the Service field.
6	Click the **Route Workflow** button . Result: A Workflow-produced Manual Input dialog box opens. 
7	Ensure that the **Create Incident** option is checked, then click **OK**. Result: An incident is created and Workflow takes you to the Incidents application, which opens to the newly created incident. Write your new incident number here: _________________.

continued on next page

Incident Escalation continued

Exercise: Create and Escalate the Incident continued

Step	Action
8	Click the **Route Workflow** button  (again). Result: Another, similar Workflow-produced Manual Input dialog box opens.
9	This time, ensure that the **Delegate** option is checked and click **OK**. Result: A different Workflow-produced Manual Input dialog box opens. 

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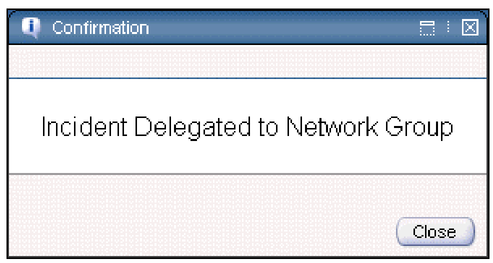
Incident Escalation continued

Exercise: Create and Escalate the Incident

continued

Step	Action
10	In this dialog box, ensure that the **Delegate to Network Group** option is checked, then click **OK**. Result: • The incident is delegated to the network group. • The Incidents application closes. • You are returned to the Start Center. • Maximo displays a Confirmation dialog box. 
11	Click **Close**.

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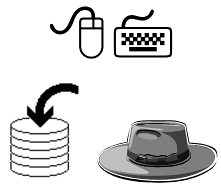
Incident Escalation continued

Exercise: Create a Solution for the Escalated Incident

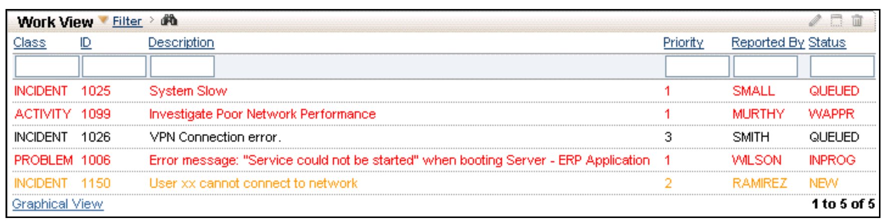


Scenario: User Javier Ramirez could not connect to his company's local area network (LAN). Tier 1 Service Desk Agent Bill Sinclair created the incident and escalated it to the IT network group. As Ron Fainter in the IT network group, there are several things that you could have the user try in order to restore his network connection. You have these written down in your notes. (Some might refer to them as a *script*.) Now that you have Maximo installed, you will use your notes to create and submit a solution.

Use the following steps.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Sign in to Maximo as Tier 2 Service Desk Agent Ron Fainter (fainter/fainter).

Result: Maximo displays the Start Center assigned to Ron Fainter. Notice that because the incident is assigned to the IT network group, of which Ron Fainter is a member, it displays in his Start Center's Work View.


</td></tr>
<tr><td>2</td><td>Find and select the incident from Javier Ramirez:

User xx cannot connect to the network.

Result: The Incidents application displays the selected incident.</td></tr>
<tr><td>3</td><td>Use Workflow and take ownership.</td></tr>
<tr><td>4</td><td>Change the status to INPROG (In Progress).</td></tr>
<tr><td>5</td><td>Start the timer.</td></tr>
</table>

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Incident Escalation continued

Exercise: Create a Solution for the Escalated Incident

continued

Step	Action
6	Create a communication to the user using the Communication Template that you created earlier in this course. Note: If desired, as in previous exercises, enter a valid e-mail address in the CC field.
7	Modify the text of the incident communication to look similar to the following example: Try each of the following, and stop when your network connection is restored: 1.) Check the network cable connector. Sometimes the clip breaks and the network cable does not stay connected. 2.) Replace the network cable. The network cable may need to be replaced. 3.) Check whether your IP Configuration is dynamic or static. This should be dynamic. 4.) If your IP Address is dynamic, use IPConfig to release and renew your IP address. 5.) If none of the above restores your network connection, have you installed any software on your system since your last successful network connection? If so, report the installed software and the results of these steps as a follow-up to your original Service Request. 6.) If not, report the results of these steps as a follow-up to your original Service Request.

continued on next page

Incident Escalation continued

Exercise: Create a Solution for the Escalated Incident

continued

Step	Action
8	**Send** the communication. Note: As noted earlier, your training environment might not have been set up to actually send/receive e-mails. However, you *must* still click Send to record this communication in the Maximo Communication Log. Result: Maximo *briefly* displays a message that the communication has been sent.
9	Create a **Work Log** entry indicating that you sent a communication to the user, and that you will submit your scripted notes as a solution. **Field** — **Value** **Type** — WORK **Viewable?** — [*Unchecked*] **Summary** — Sent steps to user. **Details** — Sent solution steps for the user to perform. Any one of which may result in the restoration of user's network connection. Will submit scripted notes as a candidate for the Maximo Solutions Knowledge Base.

continued on next page

Incident Escalation continued

Exercise: Create a Solution for the Escalated Incident

continued

Step	Action
10	**Save** the record, click the **Solution Details** tab, and enter the following information: **<u>Field</u>** — **<u>Value</u>** **Symptom** — User *xx* cannot connect to the network. **Cause** — Undetermined, see Resolution, below. **Resolution** — [*Similar to text in step 7*] Try each of the following, and stop when your network connection is restored: 1.) Check the network cable connector. Sometimes the clip breaks and the network cable does not stay connected. 2.) Replace the network cable. The network cable may need to be replaced. 3.) Check your IP Configuration, is it dynamic or static. This should be dynamic. 4.) If your IP Address is dynamic, use IPConfig to release and renew your IP address. 5.) If none of the above restores your network connection, have you installed any software on your system since your last successful network connection? If so, report the installed software and the results of these steps as a follow-up to your original Service Request. 6.) If not, report the results of these steps as a follow-up to your original Service Request. <u>Note</u>: “User *xx*” is used only to differentiate your record from others in a hosted training environment. As a general practice, you would not identify a specific user in a solution submitted to a knowledge base.

continued on next page

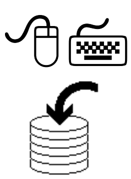
Incident Escalation continued

Exercise: Create a Solution for the Escalated Incident

continued

Step	Action
11	**Submit** the solution as a candidate for the Solutions Knowledge Base. Hint: Use Create > Solution from the Select Action menu. Result: Recall that Maximo only *briefly* displays the message that the solution has been created. Write the solution # here: ____________________.
12	Stop the timer, **save** your record, and return to the **Start Center**.

Exercise: Resolve the Escalated Incident



Scenario: User Javier Ramirez could not connect to his company's local area network (LAN). Tier 1 Service Desk Agent Bill Sinclair created the incident and escalated it to the IT network group. Ron Fainter in the IT network group communicated to the user and submitted a solution. Now, as Ron Fainter, you will use Workflow to resolve the incident.

Use the following steps.

Step	Action
1	Sign in to Maximo as Tier 2 Service Desk Agent Ron Fainter (fainter/fainter). Result: Maximo displays the Start Center assigned to Ron Fainter.
2	Find and select the incident from Javier Ramirez: **User *xx* cannot connect to the network.** Result: Maximo displays the incident.

continued on next page

Incident Escalation continued

Exercise: Resolve the Escalated Incident

continued

Step	Action
3	Use **Workflow** and resolve the incident. Result: The incident's status changes to RESOLVED, and you are returned to the Start Center for Ron Fainter.

Exercise: Related Records Revisited

Because you used Workflow to resolve the incident, you were not able to see that the originating SR was also closed when the incident was closed.

Use the following steps.

Step	Action
1	Sign in to Maximo as Tier 2 Service Desk Agent Ron Fainter. Result: Maximo displays the Start Center assigned to Ron Fainter.
2	Find and select the incident from Javier Ramirez: **User *xx* cannot connect to the network.** Hint: Maximo will not list this incident in the Work View. Result: Maximo displays the incident.
3	Click the **Related Records** tab. Result: Notice that the originating SR is also RESOLVED.

continued on next page

Incident Escalation continued

Discussion

Why does this incident not display in the Work View now?

In this scenario, the user's original problem (cannot connect to network) is not yet actually resolved. So why might we have changed the status of the incident to RESOLVED?

What other status might be valid for this scenario?

How could Workflow be enhanced/useful in this process?

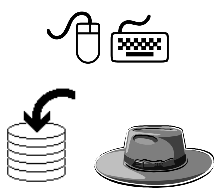
The Solutions Application

Introduction

You use the Solutions application to create and manage solution records in a service desk environment. It is an administrative application that is separate from the Search Solutions application, which customers use to find solutions.

A *solution* is a predefined response to a commonly asked question or problem. You can allow customers to search and view solutions from the Maximo simplified knowledge base, called Search Solutions, to resolve their problems on their own. You must set the status of a solution to ACTIVE for it to be accessible from other Maximo applications, and you *must* select the **Self-Service Access?** option for it to be accessible to Self-Service users.

Exercise: Reviewing Draft Solutions



Scenario: User Javier Ramirez could not connect to his company's local area network (LAN). Tier 1 Service Desk Agent Bill Sinclair created the incident and escalated it to the IT network group. Ron Fainter in the IT network group submitted a solution. As Mike Wilson, you will review the submitted (Draft) solution, modify it if necessary, approve the solution for inclusion in the Maximo Solutions Knowledge Base, and make it available to Self-Service users.

Use the following steps.

Step	Action
1	Sign in to Maximo as Mike Wilson (wilson/wilson). Result: Maximo displays the Start Center assigned to Mike Wilson.
2	From the **Go To** menu, choose **Service Desk > Solutions**. Result: The Solutions application opens.

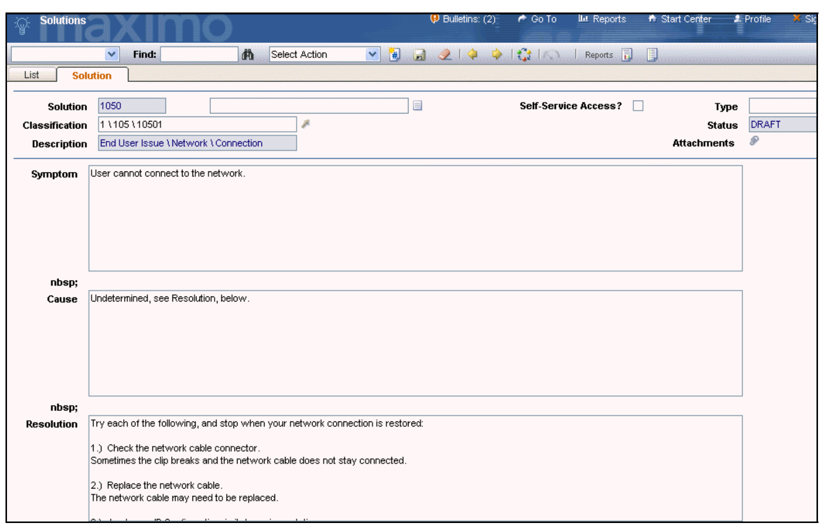
continued on next page

The Solutions Application continued

Exercise: Reviewing Draft Solutions

continued

Step	Action
3	In the **Solutions** application, search for the solution you created in the previous section. Hint: Filter on a status of DRAFT or use the solution number you wrote down. Note 1: At this time, because there is no Description field on the Solutions tab of ticket applications, you *cannot* use the Description field to search for solutions submitted from ticket applications. Note 2: There are two solutions in a DRAFT status with no description. These are the two solutions that you submitted earlier in this course: • User *xx* cannot archive his e-mail. • User *xx* cannot connect to the network. Note 3: If you are in a hosted environment, there will be quite a few DRAFT solutions (two for each course participant) with no description. In this case, use the solution number you wrote down in this chapter from the exercise *Create a Solution for the Escalated Incident, step 11 on page 6-15*. Result: Maximo displays the selected solution on the Solution tab.



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The Solutions Application continued

Exercise: Reviewing Draft Solutions

continued

Step	Action
4	Enter the following information: **Field** — **Value** **Description** — Cannot connect to network *xx*. **Self-Service Access?** — ✓ [*Checked*]
5	Best Practice: Make any changes to Symptom, Cause, and Resolution fields of solutions to ensure that the solution is universal. Change the **Symptom** field by removing the word **User** and capitalizing the word **Cannot**.
6	**Save** the record.
7	Change the status to **ACTIVE**. Result: Your solution record is now part of the Maximo Solutions Knowledge Base.
8	Return to the **Start Center**.

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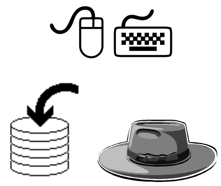
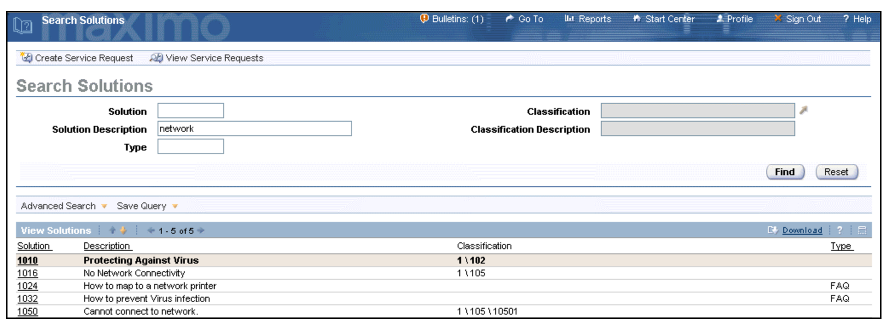
The Solutions Application continued

Exercise: Verifying (Using) the New Solution



Scenario: A different user, Tony Redding, is having a problem with his network connectivity. He searches solutions and finds the one that you just activated, and it solves his problem.

Step	Action
1	Sign in to Maximo as Tony Redding (redding/redding). Result: Maximo displays the Start Center assigned to Tony Redding.
2	Open the **Search Solutions** application. Hint: Use the Service Desk Actions portlet. Result: The Search Solutions application opens.
3	Enter network in the **Solution Description** field, then press **Enter** (or click **Find**). Result: Maximo displays a list of all of the available solutions with *network* in the description. 

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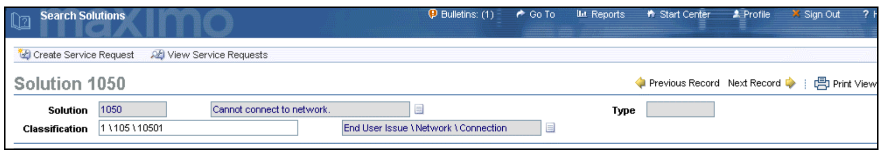
The Solutions Application continued

Exercise: Verifying (Using) the New Solution

continued

Step	Action
4	Click to select your solution from the previous exercise. Result: The selected solution opens for your review. 
5	As user Tony Redding, you review the solution and try the steps in the resolution, and your network connection is restored. After the question **Did this solution help you resolve your issue?**, click **Yes**. Result: You are returned to the Start Center.

Ticket Activities

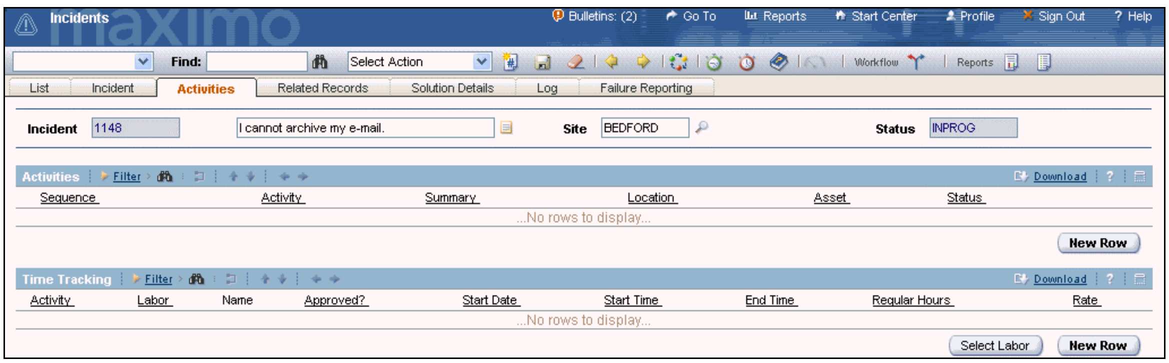
Introduction

You use the Activities tab in the Incidents application to create, delegate, and track activity work orders for the incident and to report actual labor time spent resolving the incident and its activities.

The Activities tab displays all activity work orders added to the incident. To see more detail for an activity, select it and view the record in the Activities application.

The Activities tab contains the following table windows:

- **Activities** to create, view, and modify activity work orders on an incident or problem.
- **Time Tracking** to report actual labor time for the incident, and to assign labor and report actual labor time for activities.



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Ticket Activities continued

Scenario

Scenario: Now that Javier Ramirez is connected to the network (previous scenario), it appears that he is not receiving any e-mail (new scenario). Tier 1 Service Desk Agent Bill Sinclair will create the incident, apply activities, and then route each activity to the proper Tier 2 group. The two activities for this exercise are: Check the e-mail server (network group) and check the user's e-mail limits (e-mail group).

Discussion

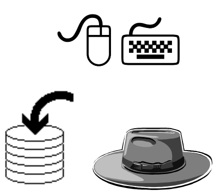
Could the user, Javier Ramirez, submit this problem as a follow-up to the original SR instead of submitting a new SR?

Why or why not?

If the user did submit this problem as a follow-up, how would it affect the incident originating from the original SR?

How could Workflow affect this process?

Exercise: Create an SR for Activities



Use the following steps.

Step	Action
1	Sign in to Maximo as Javier Ramirez (ramirez/ramirez). Result: Maximo displays the Start Center assigned to Javier Ramirez.

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Ticket Activities continued

Exercise: Create an SR for Activities

continued

Step	Action
2	Use **Self-Service** and search solutions using %mail in the description. Best Practice: Remember, it is a best practice to encourage users to always search solutions first. Result: You should not find any applicable solution for this scenario.
3	Create an SR using the following information: **Field** — **Value** **Summary** — I am not getting e-mail *xx*. **Details** I am not getting e-mail. It is Monday morning, and usually on Monday morning, when I open my e-mail, I have 40 - 50 e-mails. I am able to get to the Internet, and to verify, I used my personal Internet e-mail account to send myself an e-mail. I did not receive it. **Reported Priority** — 1 (Urgent) **Classification** — 1 \ 102 \ 10202 \ 1020201 (Use **Detail Menu** > **Classify**: End User Issue \ Software \ Email \ Can't Receive)

continued on next page

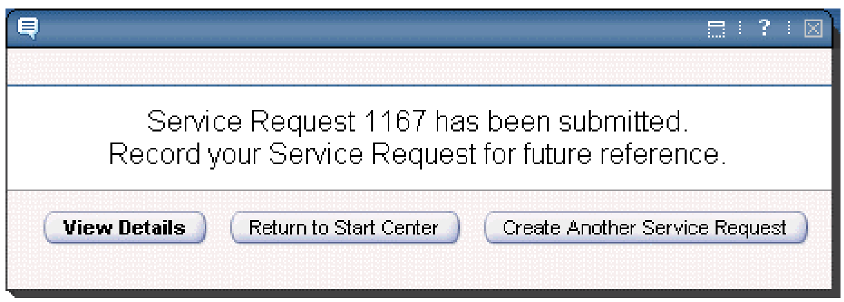
Ticket Activities continued

Exercise: Create an SR for Activities

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Click Submit.

Result: Maximo displays a dialog box.

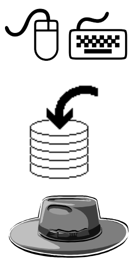


Write down your SR # here: ____________________.</td></tr>
<tr><td>5</td><td>Click either View Details or Return to Start Center.

Result:
If you chose to view the details, then you should see the View Service Requests page. Return to the Start Center when you are finished.
If you chose to return to the Start Center, then you should be viewing the Start Center for Javier Ramirez.</td></tr>
</table>

Ticket Activities continued

Exercise: Create the Incident and Add an Activity



Scenario: User Javier Ramirez appears not to be receiving any e-mail. As Tier 1 Service Desk Agent Bill Sinclair, you will create the incident, apply activities, and then route each activity to the proper Tier 3 group. The activities for this exercise are: Check the e-mail server (network group) and check the user's e-mail limits (e-mail).

For the purpose of this exercise, we will assume that Tier 1 Service Desk Agent Bill Sinclair contacted user Javier Ramirez. He inquired about the last time and how frequently Javier archives his e-mail. Because Javier is in a highly visible position, he receives many e-mails—and he regularly archives, so that is not the problem.

Use the following steps to create the incident and add the first activity.

Step	Action
1	Sign in to Maximo as a Tier 1 Agent Bill Sinclair. Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	Open the **SR** application, then find and select the SR submitted by user Javier Ramirez (status NEW) with the following description: **I am not getting e-mail *xx*.** Result: The SR application opens with the selected SR.
3	Use **Workflow** where appropriate and perform the following steps: • Create an incident. Write your incident # here: _________________. • Set the **Internal Priority** (*your choice*). • Select the **Service** (EMAIL). • Take ownership. • Change the **Status** (INPROG). • Start the timer. • **Save** the record.

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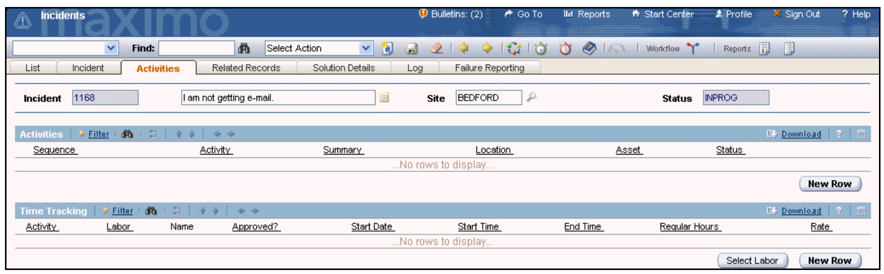
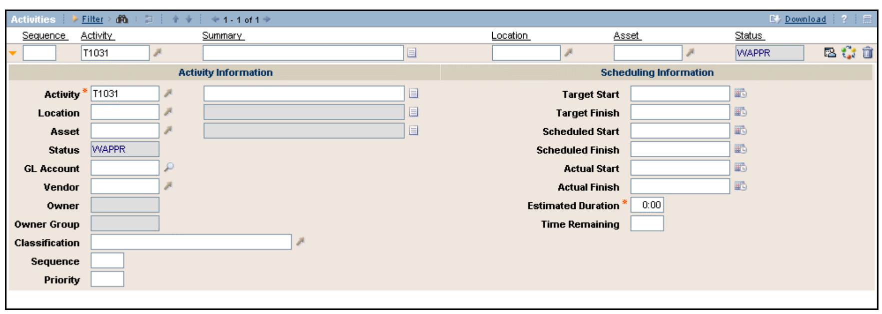
Ticket Activities continued

Exercise: Create the Incident and Add an Activity

continued

Step	Action
4	Click the **Activities** tab. Result: Maximo displays the Activities tab. 
5	In the **Activities** section, click **New Row**. Result: A new row opens for data entry. 

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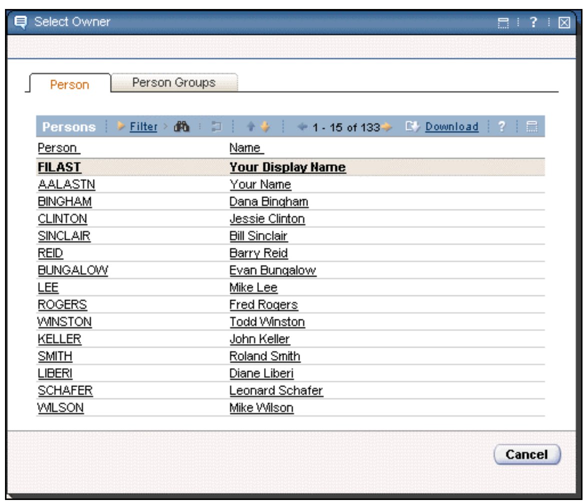
Ticket Activities continued

Exercise: Create the Incident and Add an Activity

continued

Step	Action
6	Enter the following description: Check the e-mail server *xx*.
7	In the **Asset** field, click **Detail Menu** and choose **Select Value**. Result: The Select Value dialog box opens.
8	In the **Filter By** field, select **ALL**, clear the **User** and **Custodian** fields, and click **Refresh**.
9	Enter server in the Filter's **Description** field, then press **Enter**.
10	From the filtered list, click to select **9001 Server, Email**. Result: The value of 9001 populates the Asset field.
11	Near the top of the **Activities** section, to the far right-hand side, click the **Owner/Owner Group** button . Result: A Select Owner dialog box opens. 

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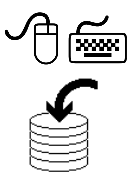
Ticket Activities continued

Exercise: Create the Incident and Add an Activity

continued

Step	Action
12	Click the **Person Groups** tab, then find and select the **NETWORK** (IT/Network Support) group. <u>Result</u>: The Select Owner dialog box closes and populates the Owner Group field.
13	Close the details, stop the timer, and **save** the record.
14	Do *not* return to the Start Center; we will start the next exercise from this point.

Exercise: Add an Activity



<u>Scenario</u>: User Javier Ramirez appears not to be receiving any e-mail. As Tier 1 Service Desk Agent Bill Sinclair, you created the incident and performed the first activity: Check the e-mail server (network group). Now you will perform the second activity: Check the user's e-mail limits (e-mail).

For the purpose of this exercise, we will assume that Tier 1 Service Desk Agent Bill Sinclair contacted user Javier Ramirez. He inquired about the last time and how frequently Javier archives his e-mail. Because user Javier is in a highly visible position, he receives many e-mails—and he regularly archives, so that is not the problem.

Use the following steps to add the activity.

Step	Action
1	Ensure that Maximo is open with the incident created from the SR submitted by user Javier Ramirez, which has the following description: **I am not getting e-mail *xx*.**
2	Start the timer.

continued on next page

Ticket Activities continued

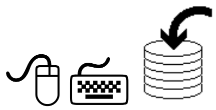
Exercise: Add an Activity continued

Step	Action
3	If it is not already displaying, select the **Activities** tab, then click **New Row** in the **Activities** section. Result: A new row opens for data entry.
4	Enter the following information, and then **save** the record. **Field** **Value** **Description** Check the user's e-mail limits.
5	Enter the following information, and then **save** the record. **Asset** 9001 (*Use the Select Value list*) Hint: Clear the Filter By, User, and Custodian fields, and then click Refresh. 
6	Enter the following information, and then **save** the record. **Owner Group** EMAIL (IT/E-mail Support) (*Use the* ***Owner/Owner Group*** *button*)
7	Stop the timer and **save** the record.
8	Do *not* return to the Start Center; we will start the next exercise from this point.

continued on next page

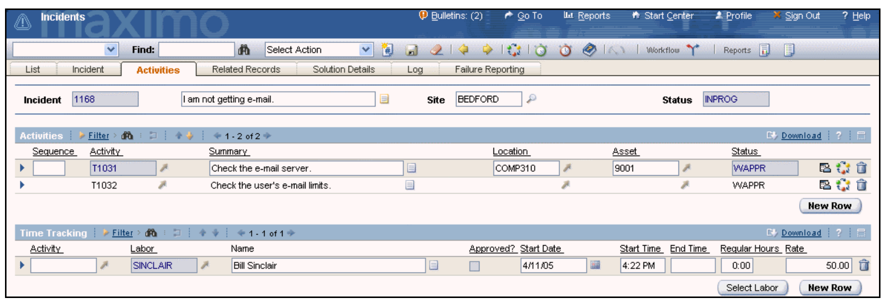
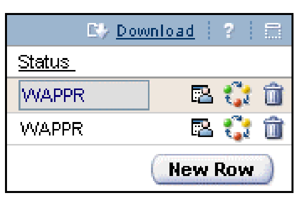
Ticket Activities continued

Exercise: Approve the Work (Activities)



Scenario: User Javier Ramirez appears not to be receiving any e-mail. As Tier 1 Service Desk Agent Bill Sinclair, you created the incident and applied the necessary activities. Now you will approve the work (activities).

Use the following steps.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Ensure that Maximo is open with the incident created from the SR submitted by user Javier Ramirez, which has the following description:
I am not getting e-mail xx.</td></tr>
<tr><td>2</td><td>Start the timer.</td></tr>
<tr><td>3</td><td>If it is not already displaying, select the Activities tab.
Result: Your Activities tab should look similar to this.

</td></tr>
<tr><td>4</td><td>

For each activity, use the Change Status icon  to change the status to APPR (Approved).
Note: If you had not saved your record, a dialog box opens informing you that you must save the record before you can change the status. If this happens, then save the record first.
Result: Both activities are now approved.</td></tr>
<tr><td>5</td><td>Stop the timer and return to the Start Center.</td></tr>
</table>

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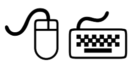
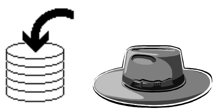
Ticket Activities continued

Discussion

Could you have approved the incident, thereby approving both activities? Why or why not?

Exercise: Working the First Activity



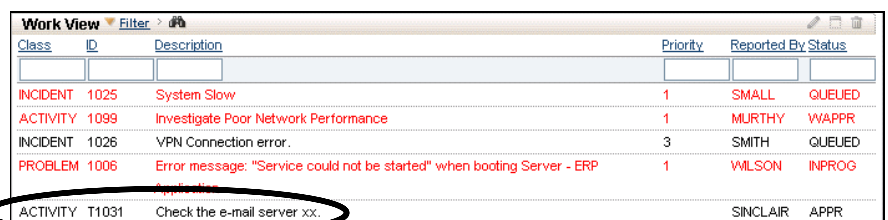


Scenario: User Javier Ramirez appears not to be receiving any e-mail. Tier 1 Service Desk Agent Bill Sinclair created the incident and the required activities. As Tier 3 Agent Ron Fainter (network), you will work the activity to check the e-mail server. You found that the e-mail server is up and running properly.

Use the following steps.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Sign in to Maximo as Tier 3 Agent Ron Fainter (fainter/fainter).

Result: Maximo displays the Start Center assigned to Ron Fainter. Notice that the new activity assigned to the NETWORK group displays for Ron Fainter.


Work View Filter
<table>
<tr><th>Class</th><th>ID</th><th>Description</th><th>Priority</th><th>Reported By</th><th>Status</th></tr>
<tr><td>INCIDENT</td><td>1025</td><td>System Slow</td><td>1</td><td>SMALL</td><td>QUEUED</td></tr>
<tr><td>ACTIVITY</td><td>1099</td><td>Investigate Poor Network Performance</td><td>1</td><td>MURTHY</td><td>WAPPR</td></tr>
<tr><td>INCIDENT</td><td>1026</td><td>VPN Connection error.</td><td>3</td><td>SMITH</td><td>QUEUED</td></tr>
<tr><td>PROBLEM</td><td>1006</td><td>Error message: "Service could not be started" when booting Server - ERP Application</td><td>1</td><td>WILSON</td><td>INPROG</td></tr>
<tr><td>ACTIVITY</td><td>T1031</td><td>Check the e-mail server xx.</td><td></td><td>SINCLAIR</td><td>APPR</td></tr>
</table>
</td></tr>
</table>

continued on next page

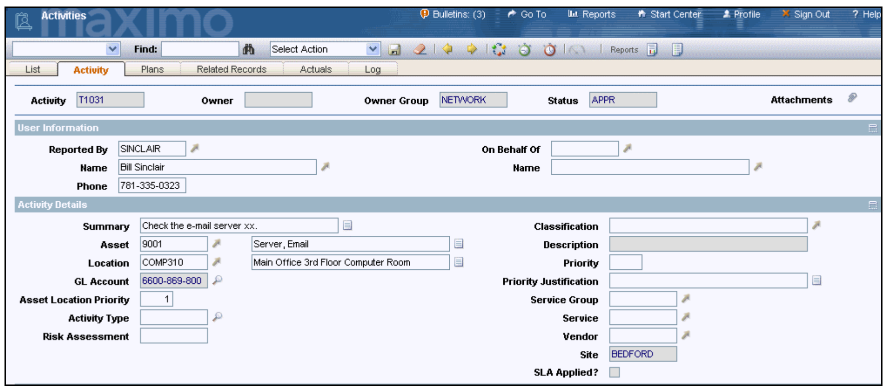
Ticket Activities continued

Exercise: Working the First Activity

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>Click to select and open this activity: Check the e-mail server xx.

<u>Result</u>: The Activities application opens.


</td></tr>
<tr><td>3</td><td>Take ownership and start the timer.

<u>Note</u>: There are no Workflow processes designed for Activities in the maxdemo training database.

<u>Result</u>: Ron Fainter starts working on this activity.

<u>Scenario</u>: If Ron Fainter needed more information, looking at the Reported By field, he would contact Bill Sinclair. However, in this example, he checks the e-mail server and finds that it is up and running with no apparent problems.</td></tr>
<tr><td>4</td><td>Use the following information to add a Work Log entry:

<u>Field</u> — <u>Value</u>
Type — WORK
Summary — E-mail server is up & running.
Details — Checked the e-mail server and it is up & running.</td></tr>
</table>

continued on next page

Ticket Activities continued

Exercise: Working the First Activity

continued

Step	Action
5	Change the Status to **COMP** (Completed).
6	Stop the timer. Suggestion: You might want to consider simulating the actual time to check the server by changing the **Hours** field in the Configure Timer dialog box to something like 1:00 (1 hour). This will give more useful, realistic data when we look at the associated costs later in this chapter.
7	**Save** the record, then return to the **Start Center**.

Notes

Note: Recall that the standard MRO training environment is meant to show you the manual process for transitioning work to help give you a better understanding of what is required and to open discussion for developing workflow in your work environment.

Scenario Note: In this or a similar scenario, you might design Workflow to notify the Reported By person (the owner of the originating ticket) that this activity is completed.

continued on next page

Ticket Activities continued

Exercise: Working the Second Activity

Scenario: User Javier Ramirez appears not to be receiving any e-mail. Tier 1 Service Desk Agent Bill Sinclair created the incident and the required activities. As Tier 3 Agent Steven Rowlands (e-mail), you will work the activity to check the user's e-mail limits.

Use the following steps.

Step	Action
1	Sign in to Maximo as Tier 3 Agent Steven Rowlands (rowlands/rowlands). Result: Maximo displays the Start Center assigned to Steven Rowlands. Notice that the new activity assigned to the NETWORK group displays for Steven Rowlands.
2	Click to select and open this activity: **Check the user's e-mail limits *xx*.** Result: The Activities application opens with the selected activity.
3	Take ownership and start the timer. Result: Steven Rowlands starts working on this activity.
	Scenario Note: Steven Rowlands checked the e-mail limits for the user (Javier Ramirez) and found them to be in line with corporate policy. However, he needed more information; therefore, he contacted the user directly. Steven Rowlands found that user Javier Ramirez recently transferred to a different position, one that requires a higher volume of e-mail. Therefore, the e-mail limit for Javier Ramirez needs to be raised in accordance with corporate policy and his new position.

continued on next page

Ticket Activities continued

Exercise: Working the Second Activity

continued

Step	Action
4	Use the following information to add a **Work Log** entry: **Field** — **Value** **Type** — WORK **Viewable?** — ✓ [*Checked*] **Summary** — Increased user's e-mail limits. **Details** — Based on user's new position, and in line with corporate policy, increased user's e-mail limits.
5	Change the Status to **COMP** (Completed).
6	Stop the timer, **save** the record, and return to the **Start Center**.

Note

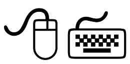
Note: Recall that the standard MRO training environment is meant to show you the manual process for transitioning work to help give you a better understanding of what is required and to open discussion for developing workflow in your work environment.

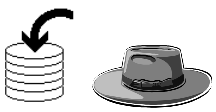
Scenario: In this or a similar scenario, you might design Workflow to alert the Reported By person (the owner of the originating incident [ticket]) that this activity is completed.

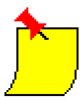
continued on next page

Ticket Activities continued

Exercise: Resolving the Incident



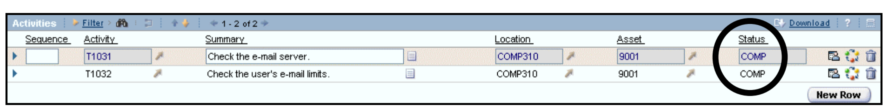




Scenario: User Javier Ramirez appeared not to be receiving any e-mail. Tier 1 Service Desk Agent Bill Sinclair created the incident and the required activities. The requisite Tier 3 agents have completed both activities. As Tier 1 Service Desk Agent Bill Sinclair, you will now resolve the ticket.

Note: Depending on how Workflow is set up in your environment for similar scenarios, as a Tier 1 service desk agent, you might have received notification that both activities have been completed.

Use the following steps.

Step	Action
1	As Bill Sinclair, find and select the incident created from the SR submitted by user Javier Ramirez with the following description: **I am not getting e-mail.** Result: The Incidents application opens with the selected incident.
2	Start the timer.
3	Click the **Activities** tab and ensure that both activities have been completed. 
4	Change the status of this incident to **RESOLVED**.

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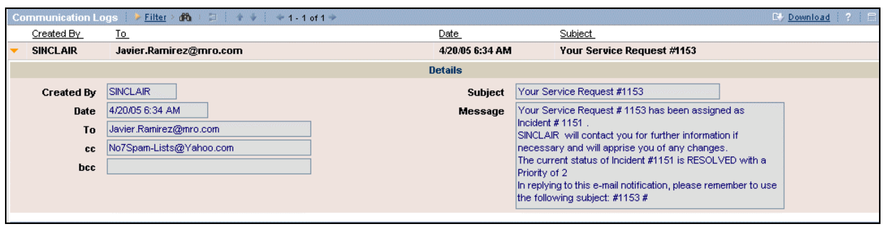
Ticket Activities continued

Exercise: Resolving the Incident

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>
Create a communication to the user and send it.
Note: Use a valid e-mail address in the CC field—one that you might have access to during this training.
Hint: You can use the Communication Template that you created in a previous chapter. Include text in the communication to let the user know that his e-mail limit has been increased to align with his new position in accordance with company policy.
Result: Your Communication Log entry should look something like this one.


</td></tr>
<tr><td>6</td><td>Stop the timer, save the record, and return to the Start Center.</td></tr>
</table>

Incidents Requiring Additional Tickets

Introduction

Until this point in the course, we have worked with incidents where the resolution of the incident resolved the problem. This is not always the case. Recall that the goal of incident management is to restore service. Sometimes this requires a temporary solution while the underlying problem is investigated. After the root cause is determined, a permanent solution is applied.

In this section, we will work with just such a scenario.

Overall Scenario

Scenario: Recall that user Henry Lowe submitted an SR to the service desk via e-mail that his hard drive was making a funny noise. Tier 1 Agent Bill Sinclair received and reviewed the SR.

Note: Recall that your training environment might not include the required elements for e-mail to function. Therefore, you would have simulated an SR submitted by e-mail from Henry Lowe by using the Alternative instructions.

Tier 1 Agent Bill Sinclair will create an incident from the SR. He will escalate the incident to a Tier 2 hardware group agent. A Tier 2 hardware group agent will review the incident and create a problem ticket. From the problem ticket, after the cause is determined, he will submit a request for a change to replace the user's hard drive.

Because the goal of incident management is to restore service, a new hard drive will be installed in the user's laptop, and this scenario will incorporate additional concepts of failure reporting and configuration change.

continued on next page

Incidents Requiring Additional Tickets continued

Exercise: Create and Assign the Incident

Scenario: In this part of the scenario, you will again take on the role of Tier 1 Agent Bill Sinclair and create an incident from the SR.

Step	Action
1	Sign in to Maximo as Tier 1 Service Desk Agent Bill Sinclair. Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	Open the **Service Requests** application. Note: You cannot use the Work View on the Start Center to find this ticket, because result sets filter by OWNER and this SR has not yet been assigned.
3	Find and select the SR from Henry Lowe: **My hard drive *xx* is making a noise.** Hint: You created this SR in a previous chapter and wrote down the SR number. Result: Maximo displays the SR. For reference, write the SR # here: ____________________.
4	In the **Service** field, click **Detail Menu** and choose **Select Value**. Result: The Select Value dialog box opens.
5	Find and select **PC** (PC Support). Result: PC populates the Service field.
6	Click the **Route Workflow** button Workflow. Result: A Workflow-produced Manual Input dialog box opens.
7	Ensure that the **Create Incident** option is checked, then click **OK**. Result: An incident is created and Workflow takes you to the Incidents application, which is open to the newly created incident. Write your new incident # here: ______________________.

continued on next page

Incidents Requiring Additional Tickets continued

Exercise: Create and Assign the Incident

continued

Step	Action
8	Start the timer.
9	Assign an **Internal Priority** of 1 (Urgent).
10	Classify the incident as: **End User Issues \ Hardware \ Laptop \ Other** Hint: Remember to choose Classify from the Detail Menu for the Classification field.
11	**Save** the record.
12	Again, click the **Route Workflow** button . Result: A different Workflow-produced Manual Input dialog box opens.
13	Ensure that the **Delegate** option is checked, then click **OK**. Result: A second Workflow-produced Manual Input dialog box opens.

continued on next page

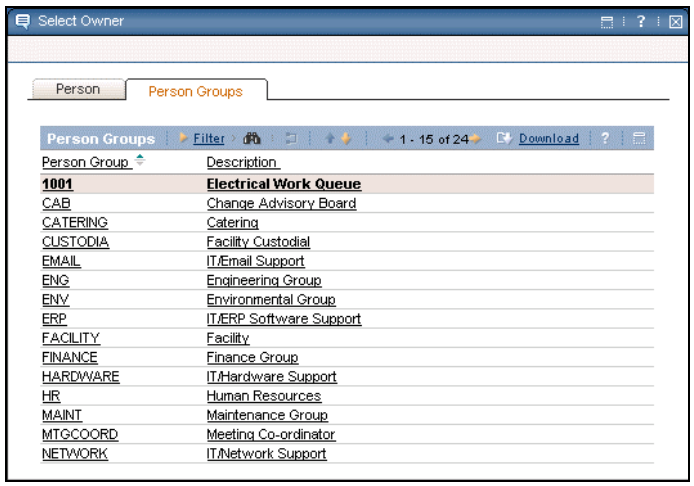
Incidents Requiring Additional Tickets continued

Exercise: Create and Assign the Incident

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>14</td><td>Ensure that the Select Owner option is checked, then click OK.

Result: The Select Owner dialog box opens.


</td></tr>
<tr><td>15</td><td>Select the Person Groups tab, then choose HARDWARE (IT/Hardware Support).

Result: The status changes to QUEUED, HARDWARE is assigned as the owner group, and an SLA is applied.</td></tr>
<tr><td>16</td><td>Stop the timer, save the record, and return to the Start Center.</td></tr>
</table>

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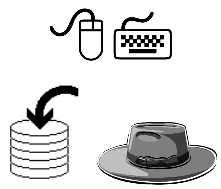
Incidents Requiring Additional Tickets continued

Exercise: Resolving the Incident



Scenario: In this part of the scenario, you will take on the role of Tier 3 Agent George Ramsdale (Hardware) and create a problem ticket to investigate the cause.

Tier 1 Agent Bill Sinclair created an incident. Tier 3 Agent George Ramsdale will contact the originating user, Henry Lowe, and listen to the noise from his hard drive. He will initially determine that the noise is probably typical of a hard drive that is going bad. He will have to investigate further to verify his suspicions.

Step	Action
1	Sign in to Maximo as Tier 3 Agent George Ramsdale (ramsdale/ramsdale). Result: Maximo displays the Start Center assigned to George Ramsdale.
2	Using the **Work View**, find the incident from the SR submitted by Henry Lowe with the following description: **My hard drive *xx* is making a noise.** Result: The incident opens.
3	Using **Workflow** where applicable: • Take ownership. • Start the timer. • Change the status to **In Progress** (INPROG). • **Save** the record.

continued on next page

Incidents Requiring Additional Tickets continued

Exercise: Resolving the Incident

continued

Step	Action
4	Enter a **viewable Work Log** entry using the following information: Scenario Note: Tier 3 Agent George Ramsdale contacted the originating user, Henry Lowe, and listened to the noise from his hard drive. He determined that the noise is indeed typical of a hard drive that is going bad. He will need to run an analysis on the hard drive to be sure. Hint: Remember to check (✓) the Viewable field, and change Type to WORK.
5	**Save** the record.
6	From the **Incident** tab, for the **Asset** field, use the **Detail Menu** and choose **Go To Assets**. Result: The Assets application opens to its List tab.
7	Because laptop computers are parents for their respective hard drives, we must list the laptop as the asset against which to record the problem. Filter the **List** tab by entering laptop into the **Description** field and fieldstaff into the **Location** field. Result: Maximo displays a filtered list.
8	After contacting the user, George Ramsdale determined Henry Lowe's hard drive is Asset # 7111. From the resulting filtered list, select **7111***. *Note: If you are in a hosted environment, each participant must choose a different value, as assigned by your instructor, from 7111 - 7131. Result: The Asset tab opens to the selected asset.

continued on next page

Incidents Requiring Additional Tickets continued

Exercise: Resolving the Incident

continued

Step	Action
9	Click the **Return with Value** link. Result: The selected asset from the Asset application populates the Asset field.
10	Change the status to **PENDING**.
11	Stop the timer.
12	Click the **Related Records** tab. What is the status of the originating SR? ____________________.
13	Using **Workflow**, create a problem ticket from the Workflow-produced **Manual Input** dialog box. Use the **Memo** field: **Hard drive making noise, determine cause.** Write the problem ticket # here: ____________________.
14	Return to the **Start Center**.

Scenario Note

Scenario Note: The user's service is not yet restored; we will need to investigate the cause for the hard drive noise and try to determine if it indeed is going bad. Problem investigation and resolution is managed through Problem Management, which we will cover in the next chapter.

Note: In this particular scenario, if it were among your business practices, it would still be within ITIL if you were to directly create a change from the incident, especially if you know the cause of the problem.

Managing Incidents

Introduction

One way that Maximo supports some of the responsibilities of incident management is through reports. Reports are a valuable tool. We will cover reports in more detail for overall service management in the last chapter of this course.

In this section, we will look at reports used for the incident management process. However, first we will view costs for a specific ticket.

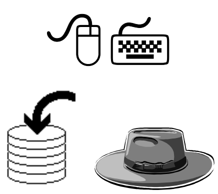
Viewing Costs

The **View Costs** dialog box is available from the Select Action menu. It lists all costs for a ticket, its activities, and activity children. The word *ticket* is a generic term for service requests, incidents, and problems.

Maximo displays costs for labor, material, tools, services, and totals. It also displays labor hours for the ticket, its activities, and its activity hierarchy.

You can access the **View Costs** dialog box from any tab in the following applications: Service Requests, Incidents, and Problems. You might need security authorization to view costs.

Exercise: Viewing Costs



Scenario: The scenario exercise from the Ticket Activities section has a wider variety of cost activity associated with it. Therefore, we will use the incident from this scenario to view costs for a ticket.

Use the following steps to view costs for a specific ticket.

Step	Action
1	Sign in to Maximo as Tier 1 Agent Bill Sinclair. Result: Maximo displays the Start Center assigned to Bill Sinclair.
2	Open the **Incidents** application, then find and select the incident of user Javier Ramirez with the following description: **I am not getting e-mail.** Hint: Status is RESOLVED. Result: The Incidents application opens with the selected incident.

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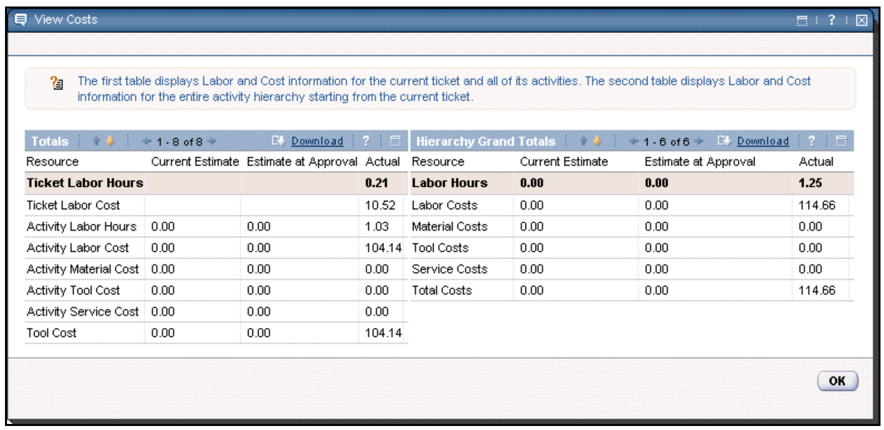
Managing Incidents continued

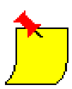
Exercise: Viewing Costs continued

Step	Action
3	From the **Select Action** menu, choose **View Costs**. Result: The View Costs dialog box opens.



Resource	Current Estimate	Estimate at Approval	Actual
Ticket Labor Hours			**0.21**
Ticket Labor Cost			10.52
Activity Labor Hours	0.00	0.00	1.03
Activity Labor Cost	0.00	0.00	104.14
Activity Material Cost	0.00	0.00	0.00
Activity Tool Cost	0.00	0.00	0.00
Activity Service Cost	0.00	0.00	0.00
Tool Cost	0.00	0.00	104.14

Resource	Current Estimate	Estimate at Approval	Actual
Labor Hours	**0.00**	**0.00**	**1.25**
Labor Costs	0.00	0.00	114.66
Material Costs	0.00	0.00	0.00
Tool Costs	0.00	0.00	0.00
Service Costs	0.00	0.00	0.00
Total Costs	0.00	0.00	114.66



Note: Because of differences in using the timer, your costs will be different from those shown here.

Step	Action
4	Referring to the information that follows this exercise, review the costs with your instructor.
5	When you are done reviewing the costs with your instructor, click **OK** and return to the **Start Center**.

continued on next page

Managing Incidents continued

The View Costs Dialog Box

In the **Totals** table window on the left side of the screen, you see actual labor hours and labor costs for the ticket, and additional information for the activities on the ticket. Each column in the table is described below:

Current Estimate:

The Current Estimate column shows current totals for planned labor, labor hours, materials, tools, and services on the activities.

Estimate at Approval:

The Estimate at Approval column is set to zero until the activity work order(s) reaches approval status. Upon approval, Maximo copies values from the Current Estimate column to the Estimate at Approval column and they become read-only. If you unapprove the activity work order(s), Maximo clears the fields.

Actual:

The Actual column shows totals for actual labor and labor hours on the ticket, and actual labor, labor hours, materials, services, and tools on the ticket's activities. If you unapprove the activities, Maximo *does not* clear the fields.

In the **Hierarchy Grand Totals** table window on the right side of the screen, you see the current estimate, estimate at approval, and actual hours and costs for the current record, its activities, tasks of the activities, and all child work orders below it in the hierarchy. Explanations of the column headings are the same as for those in the Totals table window.

Incident Management Reports

Reporting is a valuable tool for use in incident management. Many of the available reports are also useful for use with problem, change, and release management, as well as for use in managing the service desk. We will take a closer look at reporting and reports in Chapter 8.

Chapter Summary

Incident Management: Revisited

The goal of incident management is to restore normal service operation as quickly as possible with minimum disruption to the business, thus ensuring that the best achievable levels of availability and service are maintained.

Incident Escalation

In this section, we looked at incidents requiring escalation. Tier 1 service desk agents might not be trained to resolve all incidents. Some incidents need to be escalated to a Tier 2 agent, a Tier 2 specialty group, or higher.

Your organization might have a person or persons designated to support different functions, all supporting the service desk. Some examples might include networks, e-mail, printing, applications, telecommunications, and PC support.

The Solutions Application

You use the Solutions application to create and manage solution records within a service desk environment. It is an administrative application that is separate from the Search Solutions application, which customers use to find solutions.

A *solution* is a predefined response to a commonly asked question or problem. You can allow customers to search and view solutions from the Maximo simplified knowledge base, called Search Solutions, to resolve their problems on their own.

Ticket Activities

You use the Activities tab in the Incidents application to create, delegate, and track activity work orders for the incident and to report actual labor time spent resolving the incident and its activities.

The Activities tab displays all activity work orders added to the incident. To see more detail for an activity, select it and view the record in the Activities application.

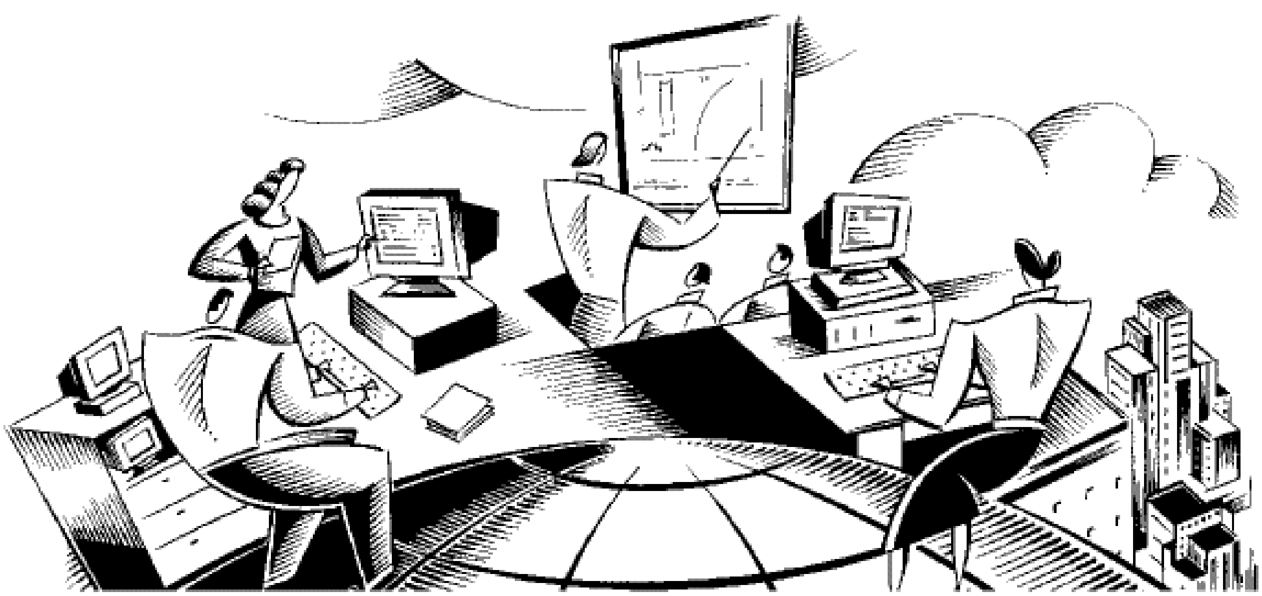
Incidents Requiring Additional Tickets

Until this point in the course, we have worked with incidents where the resolution of the incident resolved the problem. This is not always the case. Recall that the goal of incident management is to restore service. Sometimes this requires a temporary solution while the underlying problem is investigated. After the root cause is determined, a permanent solution is applied.

NOTES:

NOTES:

Chapter 7: Problem, Change, and Release Management



In This Chapter

This chapter contains the following topics:

Chapter Overview

Introduction

While the process of problem management is different from incident management, the Maximo Problems application that supports it is similar to the Incidents application.

Because we extensively covered several scenarios for incident management in the previous two chapters, we will look at only one scenario each for problem, change, and release management.

Chapter Focus

The focus of this chapter is to learn how Maximo supports problem, change, and release management.

Learning Objectives

When you have completed this chapter, you should be able to:

- Define the goal of problem management
- Create a problem ticket
- Take ownership
- Create a work log entry
- Define the goal of change management
- Create a change
- Modify a change
- Plan labor, materials, and tools for a change
- Approve a change
- Assign a change
- Enter actual labor, tools, and materials
- Use Assignment Manager to assign labor
- Complete the change
- Use Assignment Manager to schedule labor
- Define release management

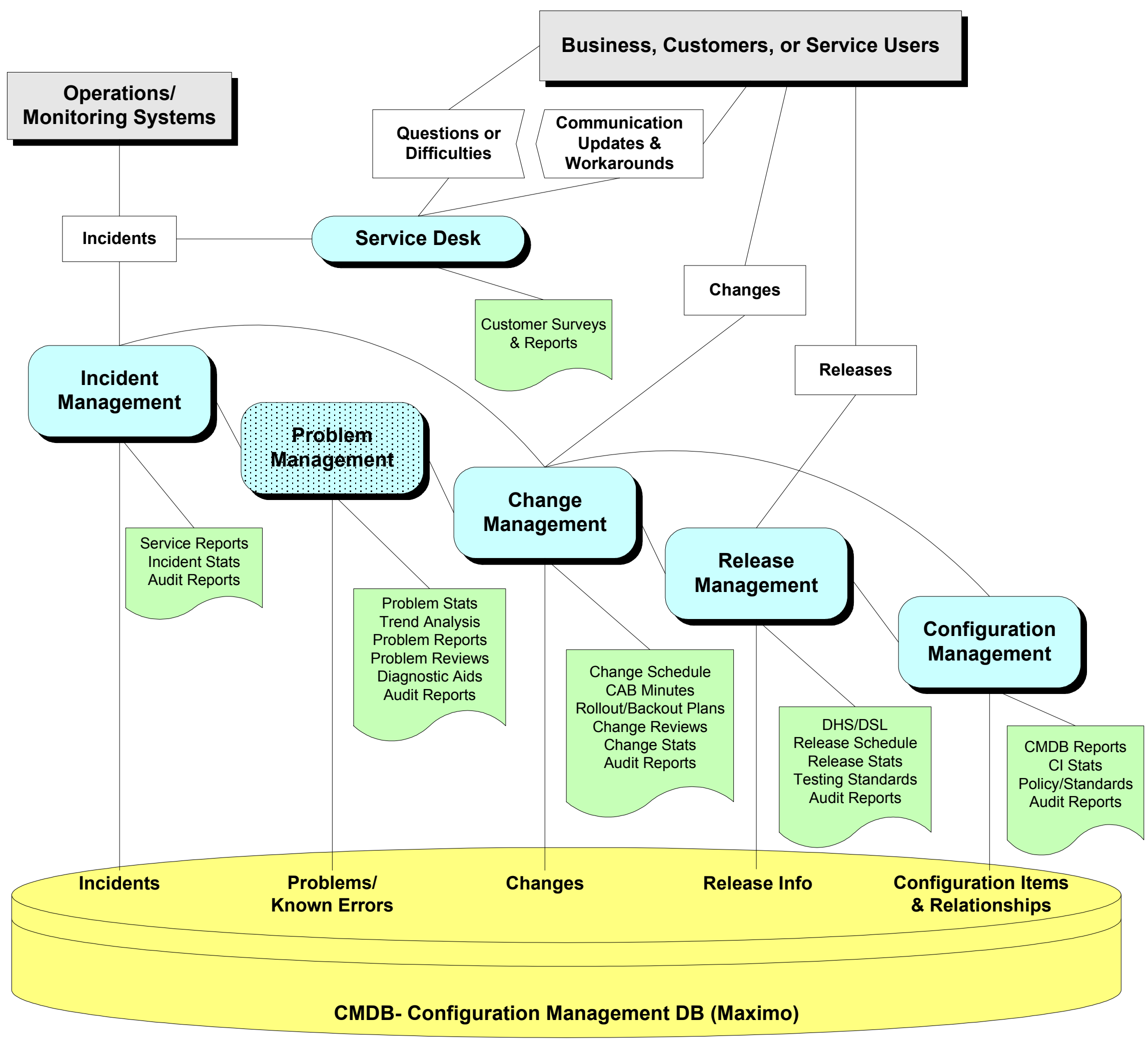
Problem Management

Introduction

In the previous chapter, we went through a scenario of incident management for an incident that required investigation through problem management. In this chapter we will build on that knowledge, but first we will look at where problem management falls within IT Service Management.

You Are Here

Recall this diagram depicting the various IT Service Management processes. Notice the dotted background for Problem Management. Throughout this section, we will be discussing the problem management process in Maximo.



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Problem Management continued

Goal

The goal of problem management is to minimize the adverse effect on the business of incidents and problems by identifying errors in the infrastructure, and to proactively prevent the occurrence of incidents, problems, and errors.

Definition

A *problem* is the unknown underlying cause of one or more incidents. It becomes a known error when the root cause is known and a temporary workaround or a permanent alternative has been identified.

Responsibilities

The actual roles and responsibilities of problem management will depend on the procedures that your organization has put into place. Some of these might include:

- Problem control
- Error control
- Assistance with handling major incidents
- Proactive prevention of problems
- Obtaining management information from problem data
- Completing major problem reviews

Problem Scenario

<u>Scenario (continued from previous chapter[s])</u>: Recall that user Henry Lowe submitted an e-mail SR to the service desk indicating that his hard drive was making a funny noise. Tier 1 Agent Bill Sinclair received and reviewed the SR.

From the created incident, Tier 3 Hardware Group Agent George Ramsdale created a problem ticket. He will investigate the problem and determine the cause. He will determine that the hard drive is failing and that it will need to be replaced. From the problem ticket, he will create a change request to replace the user's hard drive.

The originating incident is still in a status of PENDING.

Note, however, that it could also have been closed where the resolution would have been to issue a temporary replacement laptop.

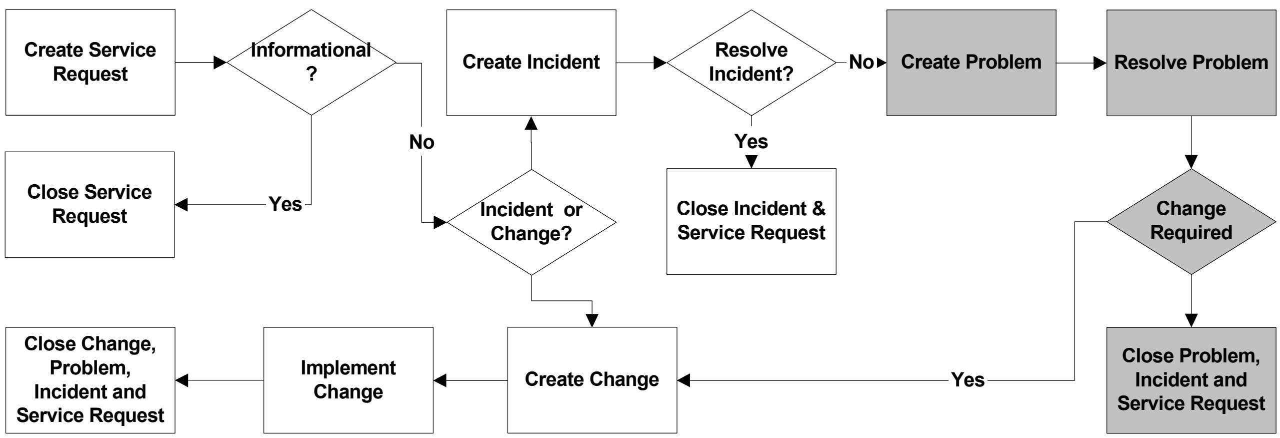
For easier reference, go back to Chapter 6 and, in the **Incidents Requiring Additional Tickets** section, find the exercise **Resolving the Incident** and write the problem # here: ____________________.

continued on next page

Problem Management continued

Incident Process Flow

The following typical ticket process flow depicts the portion (Problems) that we will be covering in this section of this chapter.



Using the Problems Application

Introduction

Problem control involves the following activities:

- Problem identification and recording
- Problem classification
- Problem investigation and diagnosis.

Maximo supports these aspects (and others) of problem management via the Problems application.

The Problems Application

You use the Problems application to create and modify problem records. You create a problem record to capture an unknown, underlying cause of one or more incidents. You resolve a problem when you identify its root cause so that similar incidents in the future are prevented or have a lesser business impact.

A problem record is a type of ticket. Other ticket types are service requests and incidents. The Problems, Incidents, and Service Requests applications are closely related and share many features. You can define relationships between tickets, link them for information purposes, and view details for them in the appropriate applications.

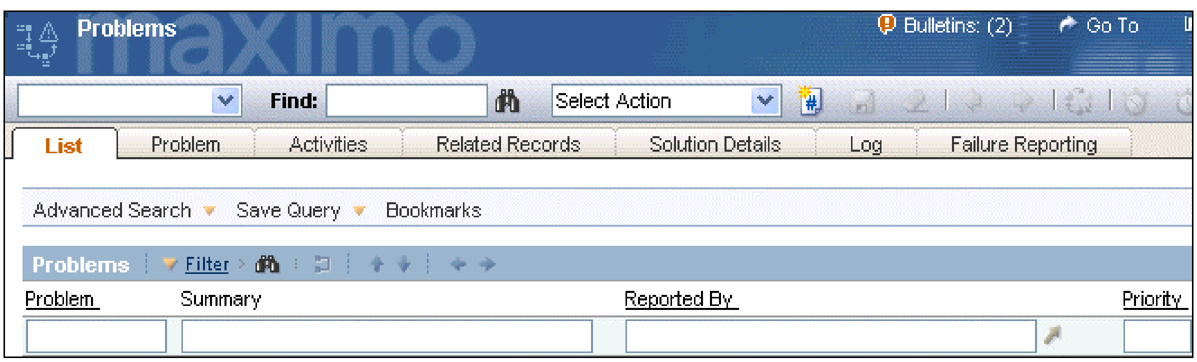
continued on next page

Using the Problems Application continued

Problems Application Tabs

The Problems application contains the following tabs:

- **List** to search Maximo for problem records.
- **Problem** to create, view, modify, or delete information that identifies the problem record; search for possible solutions; and, after the underlying cause is identified, mark the problem as a known error.
- **Activities** to report actual labor time spent resolving the problem and to create, delegate, and track activity work orders for the problem.
- **Related Records** to relate, view, and navigate relationships between service requests, incidents, problems, and other records.
- **Solution Details** to add or view solution information for this record.
- **Log** to create, view, modify, or delete work log entries, and to view communication log entries.
- **Failure Reporting** to view and record failure information for assets and locations on a problem record.



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Using the Problems Application continued

Problem Ticket Statuses

The status of a problem changes as it moves toward completion. The following information describes the default statuses for problems. Your system administrator might have added, removed, or changed the names of these supplied statuses.

Status	Description
NEW	Used when you create or insert a problem. You cannot revert to this status after you change it.
QUEUED	Applies when problem ownership is given to a person or a group. Ownership assignment can be made manually or might be made automatically via Workflow, a service level agreement, or other escalation process. For more information, see the Workflow Help or the Service Level Agreements Help, respectively.
INPROG (In Progress)	Use this status when someone is working on this problem. The first time a problem reaches this status, Maximo populates the Actual Start field, if it is empty.
PENDING	Use this status when a problem is pending an external action (for example, vendor or user callback, or waiting for parts).
RESOLVED	Use this status when information has been gathered and routed, service has been restored, or a solution has been provided. The first time a problem reaches this status, Maximo populates the Actual Finish field, if it is empty. If necessary, you can reopen a problem and change the status from RESOLVED to INPROG.
CLOSE (Closed)	Use this status when a problem becomes a historical record. When a record is closed, you cannot change the status. You can, however, edit certain parts of the history record.

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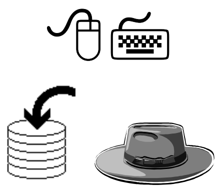
Using the Problems Application continued

Exercise: Working a Problem Ticket



Scenario: Recall that user Henry Lowe submitted an SR to the service desk via e-mail that his hard drive was making a funny noise. Tier 1 Agent Bill Sinclair received and reviewed the SR.

From the created incident, Tier 3 Hardware Group Agent George Ramsdale created a problem ticket. He will investigate the problem and determine the cause. From the problem ticket, he will create a change request to replace the user's hard drive.

Note, however, that we also could have gone straight to creating a change, especially if we knew for sure that the hard drive was indeed failing and that replacing it is the only fix to the known problem.

The originating incident is in a status of PENDING, and the created problem ticket is in a status of NEW.

Step	Action
1	Sign in to Maximo as Tier 3 Agent George Ramsdale (ramsdale/ramsdale). Result: Maximo displays the Start Center assigned to George Ramsdale. Note: Because the problem is currently unassigned, it does not show up in George Ramsdale's Work View.

continued on next page

Using the Problems Application continued

Exercise: Working a Problem Ticket

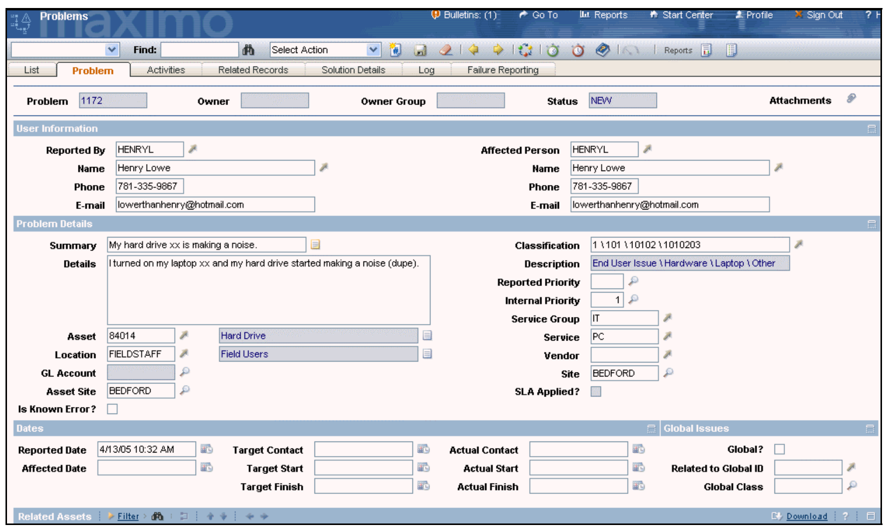
continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>
Open the Problems application, then find and select the problem originating from the SR submitted by Henry Lowe with the following description:

My hard drive xx is making a noise.

<u>Hint</u>: You can filter on the word noise in the Description field.

<u>Result</u>: The Problems application opens.



</td></tr>
<tr><td>3</td><td>
Perform the following tasks:

- Take ownership.
- Change the status to INPROG.
- Start the timer.
</td></tr>
</table>

continued on next page

Using the Problems Application continued

Exercise: Working a Problem Ticket

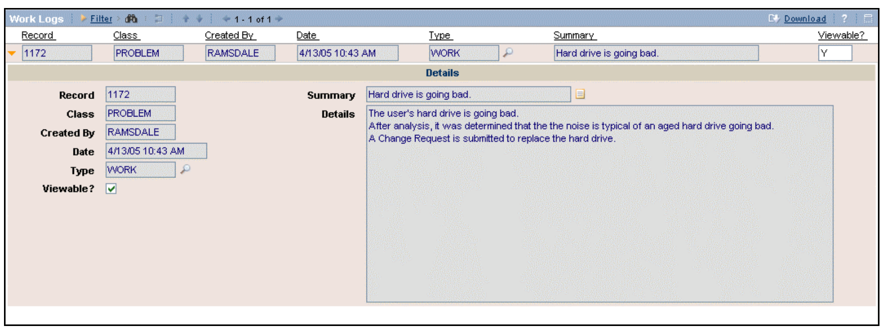
continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Investigate the problem.

Result: Tier 3 Agent George Ramsdale worked with the requestor and investigated the noise from his hard drive. After analyzing the hard drive, he determined that it is indeed going bad and that it will have to be replaced. He will need to create a change request to replace Henry Lowe’s hard drive.</td></tr>
<tr><td>5</td><td>Using what you have learned thus far, create a viewable Work Log entry.

Hint: Remember to change the Type value to WORK.

Result: Your Work Log entry might look something like this one.


</td></tr>
<tr><td>6</td><td>Create a change.

Write your change # here: ____________________.</td></tr>
<tr><td>7</td><td>Change the status to PENDING.</td></tr>
<tr><td>8</td><td>Stop the timer, save the record, and return to the Start Center.</td></tr>
</table>

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Using the Problems Application continued

Challenge Question

In this exercise scenario, because George Ramsdale worked the incident ticket, could he have investigated the cause of the problem while working the incident and just reported the results as a solution (instead of creating a problem ticket)?

Why or why not?

Managing Problems

This short, brief scenario only touched on the responsibility of problem management. Recall that some of the other responsibilities of problem management are:

- Assistance with handling major incidents
- Proactive prevention of problems
- Obtaining management information from problem data
- Completing major problem reviews

One way that Maximo supports some of these responsibilities is through reports.

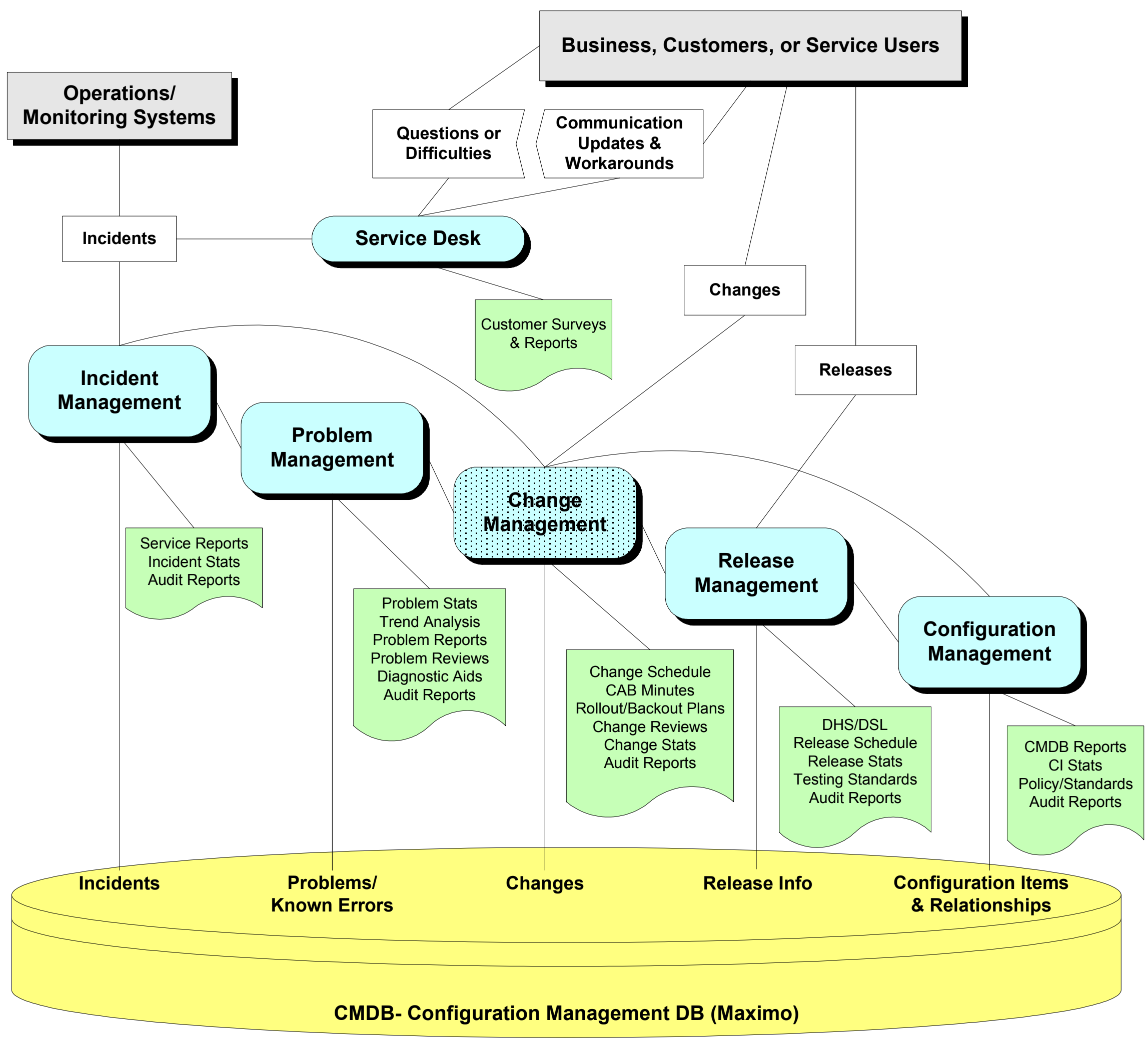
Change Management

Introduction

In the previous section we went through a scenario for problem management for a problem that required investigation. In this section we will build on that knowledge, but first let's look at where change management falls within IT Service Management.

You Are Here

Recall this diagram depicting the various IT Service Management processes. Notice the dotted background for Change Management. Throughout this section, we will be discussing the change management process in Maximo.



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Change Management continued

Goal

The goal of change management is to ensure that standardized methods and procedures are used for efficient and prompt handling of all changes, in order to minimize the impact of any related incidents upon service.

Definition

A standard *change* is an accepted solution to an identifiable and relatively common set of requirements, where authority is effectively given in advance of implementation.

Responsibilities

Change management is responsible for controlling change to configuration items (CIs) within the live environment. It is not responsible for change within ongoing projects.

The actual roles and responsibilities of change management will depend on the procedures that your organization has put into place. Some of these might typically include:

- Raising and recording changes
- Assessing the impact, cost, benefit, and risk of proposed changes
- Managing and coordinating change implementation
- Monitoring and reporting on the implementation
- Reviewing and closing requests for change (RFCs)

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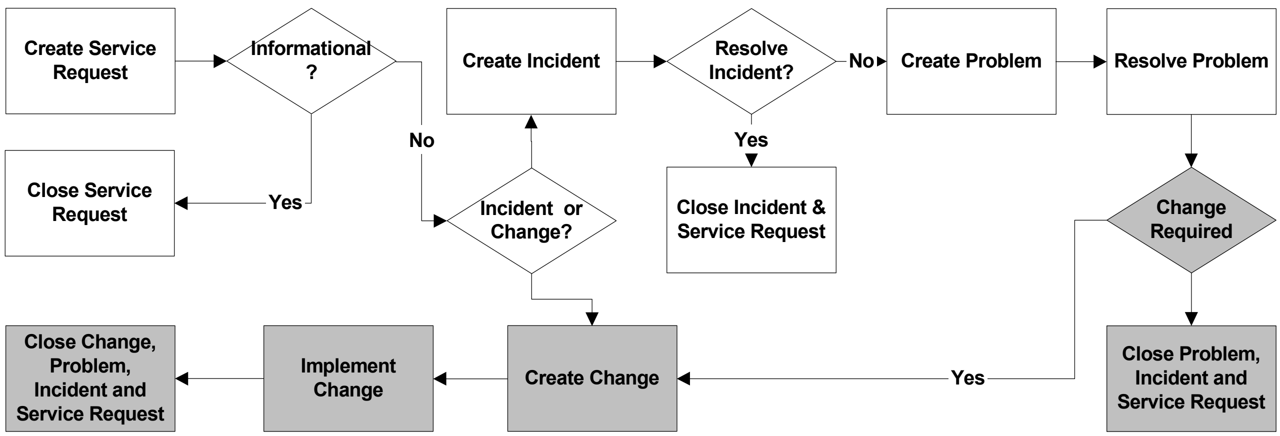
Change Management continued

Incident Process Flow

The following typical ticket process flow depicts the portion (Changes) that we will be covering in this section of this chapter.



Introduction

There are different types of changes available in Maximo:

- Standard: Everyday changes.
- Minor: Some impact on business, to infrastructure.
- Major: Significant impact on business, to infrastructure.

Note: While your business practices might include additional change types, these three are available out-of-the-box in Maximo.

Changes to configuration items (CIs) affect the Configuration Management Database (CMDB). The MRO Software *IT Asset Configuration and Management in MXES* course provides more information.

Change Scenario

Scenario (continued from previous chapter[s]): Recall that user Henry Lowe submitted an SR to the service desk via e-mail that his hard drive was making a funny noise. Tier 1 Agent Bill Sinclair received and reviewed the SR.

From the created incident, Tier 3 Hardware Group Agent George Ramsdale created a problem ticket. He investigated the problem and determined the cause. From the problem ticket, he created a change request to replace the hard drive.

The originating problem is in a status of PENDING, and the created change request is in a status of NEW.

For easier reference, go back to the previous section, find the exercise **Working a Problem Ticket**, and write the created change # here: ___________.

The Changes Application

Introduction

Maximo supports change management through the Changes application.

The Changes Application

You use the Changes application to plan, review, and report actuals for implementing changes or deploying new, standard configurations to existing assets.

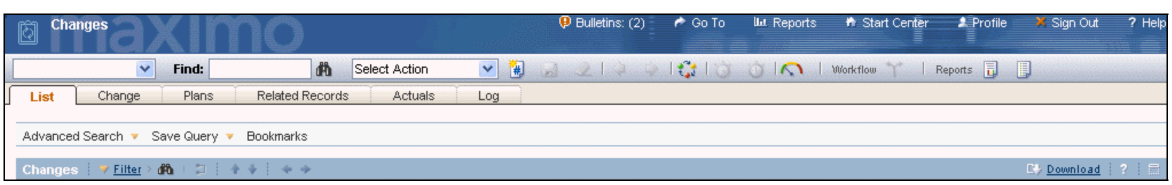
You also can create changes in other Maximo applications.

A change is a type of work order. Other types of work orders are releases and activities. Activities are actually child work orders.

Changes Application Tabs

The Changes application contains the following tabs:

- **List** to search the database for work orders using any combination of available fields.
- **Change** to create, view, and modify changes; view scheduling information; select or assign record ownership; and identify assets, locations, or services that are affected by a change.
- **Plans** to enter, view, and modify job tasks and labor, material, services, and tool requirements for the work plan.
- **Related Records** to view, add, and delete related work orders and tickets; to view follow-up records for the current record.
- **Actuals** to enter, view, and modify actual work order start and finish times; labor hours and costs; material quantities, locations, and costs; and tool quantities, hours, and costs.
- **Log** to view and create work log and communication entries about the current record.



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The Changes Application continued

Changes Are a Type of Work Order

Every work order (including changes) in Maximo has a status value that indicates its position in the work order processing cycle.

The term *work order* can refer to a work order, a change, a release, or an activity record.

Work orders can be created with different statuses, depending on which application you use to create or generate them. You might need security authorization to select each status option.

If you change the status of a work order that has child work orders with their **Inherit Status Changes** check box selected, Maximo also applies the status change to the child work orders, if appropriate.

You use the **Change Status** option from the Select Action menu to change the status of one or more records. You can “skip over” some statuses when you select advanced statuses, such as in the processing cycle.

To view previous status changes for a work order, select **View > History** from the Select Action menu.

continued on next page

The Changes Application continued

Changes Are a Type of Work Order

Work orders (including changes, releases, and activities) can have any of the following statuses:

Status	Description
WAPPR (Waiting for Approval)	This is the default status for records that you create in the following applications: Work Order Tracking, Changes, Releases, and Activities.
APPR (Approved)	This status indicates that the work plan has been approved and the work can begin. You can report actuals against approved work orders.
WSCH (Waiting to Be Scheduled)	This is the default status for work orders you generate from Preventive Maintenance and Condition Monitoring records. You can change the default status on the PM record.
WMATL (Waiting on Material)	This status indicates that materials must arrive before the work can be performed.
WPCOND (Waiting on Plant Condition)	This status indicates that the work will be performed when the plant's condition makes the work possible. For example, if the plant is operating and the work must be performed while the plant is shut down, the work order is waiting on the plant condition.
INPRG (In Progress, or Initiated)	This is the default status for work orders that you create in Quick Reporting.
COMP (Completed)	This status indicates that all the physical work has been completed.
CLOSE (Closed)	This status finalizes the work order. When you close a work order, Maximo removes inventory reservations for items that were not used on the work order, and makes the work order a history record.
CAN (Canceled)	This status indicates that the work will not be performed. If the work order has already been initiated or actuals have already been reported, you cannot change its status to CAN. If the selected work order had been approved, Maximo removes item reservations from Inventory for the work order, and makes the work order a history record.

Planning the Change

Introduction

Changes can be initiated from different sources. Tickets (SRs, incidents, and problems) are just one source. In this section, using a scenario from the previous section, we will concentrate on a change created from a problem (ticket).

Scenario

Scenario: Recall that user Henry Lowe submitted an SR to the service desk via e-mail that his hard drive was making a funny noise. Tier 1 Agent Bill Sinclair received and reviewed the SR.

From the created incident, Tier 3 Hardware Group Agent George Ramsdale created a problem ticket. He worked with the requestor and investigated the noise from his hard drive. After analyzing the hard drive, he determined that it is indeed going bad and that it will need to be replaced. He submitted a change request to replace Henry Lowe's hard drive.

The originating problem is in a status of PENDING, and the change request is in a status of NEW.

Exercise: Taking Ownership

Use the following steps to start working on the change as Mike Wilson.

Step	Action
1	Sign in to Maximo as Change Manager Mike Wilson. Result: Maximo displays the Start Center assigned to Mike Wilson.

continued on next page

Planning the Change continued

Exercise: Taking Ownership

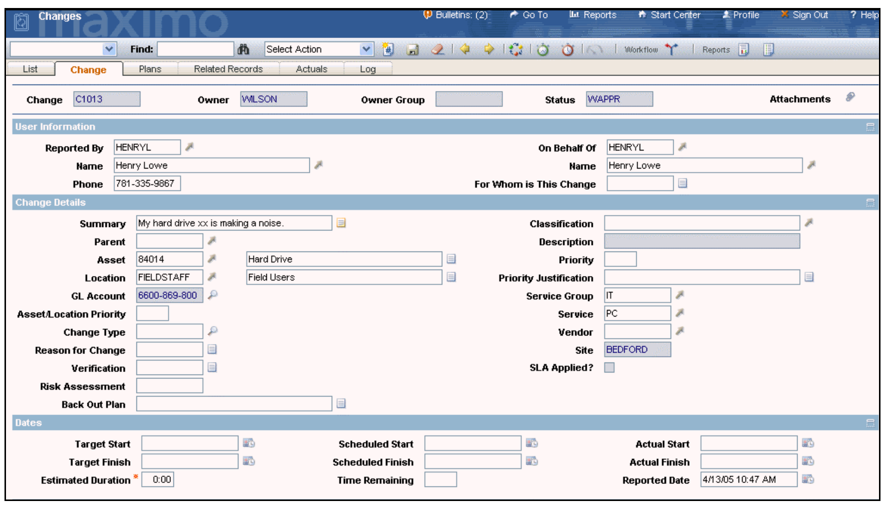
continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>Open the Changes application, then find and select the change originating from the SR submitted by Henry Lowe with the following description:

My hard drive xx is making a noise.

<u>Hint</u>: You can filter on the word noise in the Description field.

<u>Result</u>: The Changes application opens.


</td></tr>
<tr><td>3</td><td>Perform the following tasks:
Take ownership.
Change Type to MINOR.
Classify the change as follows:
4 \ 401 \ 40101 \ 4010102
(Changes \ Hardware \ Laptop \ Swap)
Save the record.</td></tr>
<tr><td>4</td><td>Do not close the Changes application; we will start the next exercise from this point.</td></tr>
</table>

continued on next page

Planning the Change continued

The Plans Tab

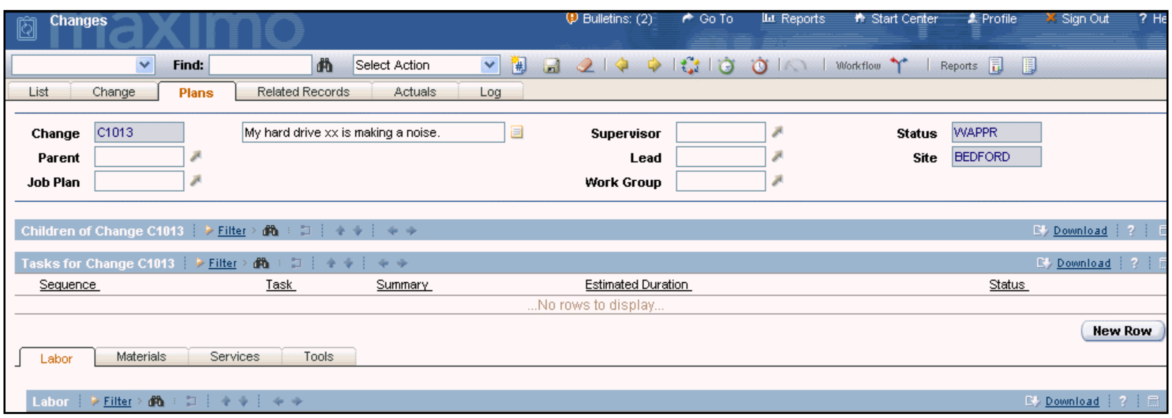
You use the Plans tab to view, enter, and modify several types of work plan data on a work orders. A *work plan* describes the tasks, labor, materials, services, and tools needed to complete the change.

Remember that a change is a type of work order.

An easy way to add a work plan to a work order is to associate a job plan with the record. When you insert an identifier in the Job Plan field or generate a work order that already has a job plan from another application, Maximo copies the job plan, called a *work plan*, to the change. Maximo might also add a safety plan to the change, if the job plan and its asset(s) or location(s) have a safety plan. Changes you make to the work plan or to the work order's safety plan do not affect the original job plan or safety plan.

Note: Job plans are covered later in this chapter.

On the Plans tab, you also can add child work orders and create tasks for the work order. You enter information about estimated labor, materials, services, and tools needed to carry out a work plan on the Plans tab's Labor, Material, Services, and Tools subtabs.



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Planning the Change continued

Plan Tasks

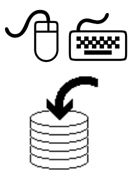
Use the Tasks section of the Plans tab to insert or edit a work order's work plan tasks. You can also use the Tasks section to add inspection data for the work asset.

If a current work plan is based on a job plan, Maximo copies all tasks and planned data from the job plan. Job plans serve as templates for work plans. Modifications you make to work plans on a change do not affect the original job plan.

We will briefly look at job plans in the next section.

You can add or edit planned tasks on a change until the change is closed, but you cannot delete tasks from an approved change or from a change on which actuals were reported for the task.

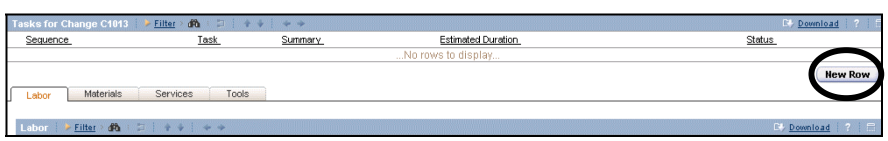
Exercise: Adding Tasks



Scenario: Recall that user Henry Lowe submitted an SR to the service desk via e-mail that his hard drive was making a funny noise. Tier 1 Agent Bill Sinclair received and reviewed the SR.

From the created incident, Tier 3 Hardware Group Agent George Ramsdale created a problem ticket. He investigated the problem and determined the cause. From the problem ticket, he created a change to replace the user's hard drive.

Our change (work order) requires several steps.

Step	Action
1	Ensure that you have the **Changes** application open to the change originating from the SR submitted by Henry Lowe, which has the following description: **My hard drive *xx* is making a noise.**
2	 Select the **Plans** tab and click **New Row** in the **Tasks** section. Result: A new row opens for editing.

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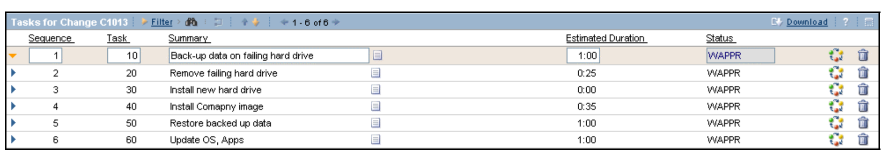
Planning the Change continued

Exercise: Adding Tasks

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Enter the following information:
<table>
<tr><th><u>Field</u></th><th><u>Value</u></th></tr>
<tr><td>Sequence</td><td>1</td></tr>
<tr><td>Task</td><td>10 (default)</td></tr>
<tr><td>Summary</td><td>Back up data on failing hard drive.</td></tr>
<tr><td>Est. Duration</td><td>1:00</td></tr>
</table></td></tr>
<tr><td>4</td><td>Click New Row, and add each of the following rows of data:
<table>
<tr><th><u>Sequence</u></th><th><u>Task</u></th><th><u>Summary</u></th><th><u>Duration</u></th></tr>
<tr><td>2</td><td>20</td><td>Remove failing hard drive</td><td>:25</td></tr>
<tr><td>3</td><td>30</td><td>Install new hard drive</td><td>:20</td></tr>
<tr><td>4</td><td>40</td><td>Install Company image</td><td>:35</td></tr>
<tr><td>5</td><td>50</td><td>Restore backed-up data</td><td>1:00</td></tr>
<tr><td>6</td><td>60</td><td>Check for OS, App updates</td><td>1:00</td></tr>
</table></td></tr>
<tr><td>5</td><td>Save the record.
<u>Result</u>: Your tasks should look similar to this.

</td></tr>
<tr><td>6</td><td>Do not close the Changes application; we will start the next exercise from this point.</td></tr>
</table>

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Planning the Change continued

Subtabs to the Plans Tab

The Plans tab has four subtabs: Labor, Materials, Services, and Tools.

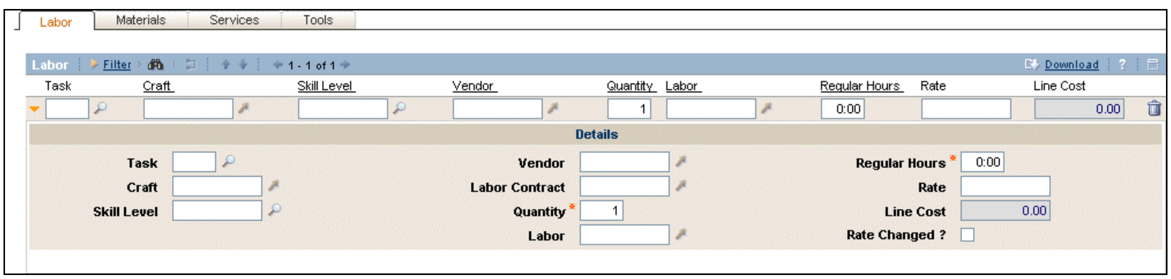
The Labor Subtab

You use the **Labor** subtab of the Plans tab to insert, view, or edit planned labor. If the change has a job plan, Maximo copies all tasks and plan data from the job plan to the work plan. When you enter labor or craft information, Maximo displays the labor or craft's description and rate. When you insert, delete, or modify quantities or hours, Maximo updates the Line Cost, Total Labor Hours, and Total Labor Cost fields.

You can plan labor in the following ways:

- Plan multiple crafts at once.
- Enter labor or crafts individually.

In the following exercise, we will select individual crafts.



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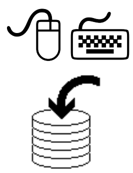
Planning the Change continued

Exercise: Adding Labor to the Work Plan



Scenario: Recall that user Henry Lowe submitted an SR to the service desk via e-mail that his hard drive was making a funny noise. Tier 1 Agent Bill Sinclair received and reviewed the SR.

From the created incident, Tier 3 Hardware Group Agent George Ramsdale created a problem ticket. He investigated the problem and determined the cause. From the problem ticket, he created a change to replace the user's hard drive.

Use the following steps to add planned labor to the change (work order).

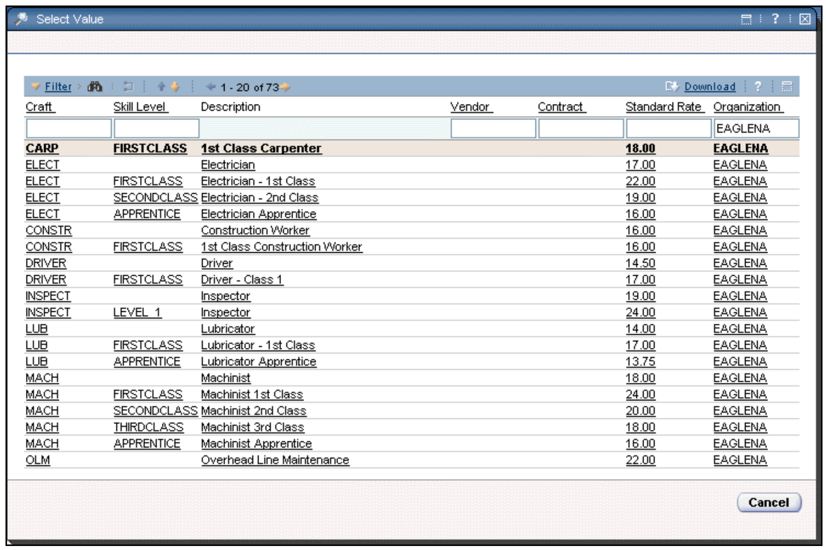
Step	Action
1	Make sure that you have the **Changes** application open to the **Plans** tab for the change originating from the SR submitted by Henry Lowe, which has the following description: **My hard drive *xx* is making a noise.**
2	On the **Labor** subtab, click the **New Row** button. Result: The Labor subtab opens a new row for editing. Note: If you wanted to choose more than one craft, you could use the Select Craft button.
3	Leave the **Task** field blank (*default*), because the selected labor applies to the entire job. If you had a complicated work plan, one that required more than one craft for different tasks, then you would identify which crafts for which tasks.

continued on next page

Planning the Change continued

Exercise: Adding Labor to the Work Plan

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>For the Craft field, use the Detail Menu and choose Select Value.
Result: The Select Value dialog box for the Craft field opens.

<table>
<tr><th>Craft</th><th>Skill Level</th><th>Description</th><th>Vendor</th><th>Contract</th><th>Standard Rate</th><th>Organization</th></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>EAGLENA</td></tr>
<tr><td>CARP</td><td>FIRSTCLASS</td><td>1st Class Carpenter</td><td></td><td></td><td>18.00</td><td>EAGLENA</td></tr>
<tr><td>ELECT</td><td></td><td>Electrician</td><td></td><td></td><td>17.00</td><td>EAGLENA</td></tr>
<tr><td>ELECT</td><td>FIRSTCLASS</td><td>Electrician - 1st Class</td><td></td><td></td><td>22.00</td><td>EAGLENA</td></tr>
<tr><td>ELECT</td><td>SECONDCLASS</td><td>Electrician - 2nd Class</td><td></td><td></td><td>19.00</td><td>EAGLENA</td></tr>
<tr><td>ELECT</td><td>APPRENTICE</td><td>Electrician Apprentice</td><td></td><td></td><td>16.00</td><td>EAGLENA</td></tr>
<tr><td>CONSTR</td><td></td><td>Construction Worker</td><td></td><td></td><td>16.00</td><td>EAGLENA</td></tr>
<tr><td>CONSTR</td><td>FIRSTCLASS</td><td>1st Class Construction Worker</td><td></td><td></td><td>16.00</td><td>EAGLENA</td></tr>
<tr><td>DRIVER</td><td></td><td>Driver</td><td></td><td></td><td>14.50</td><td>EAGLENA</td></tr>
<tr><td>DRIVER</td><td>FIRSTCLASS</td><td>Driver - Class 1</td><td></td><td></td><td>17.00</td><td>EAGLENA</td></tr>
<tr><td>INSPECT</td><td></td><td>Inspector</td><td></td><td></td><td>19.00</td><td>EAGLENA</td></tr>
<tr><td>INSPECT</td><td>LEVEL 1</td><td>Inspector</td><td></td><td></td><td>24.00</td><td>EAGLENA</td></tr>
<tr><td>LUB</td><td></td><td>Lubricator</td><td></td><td></td><td>14.00</td><td>EAGLENA</td></tr>
<tr><td>LUB</td><td>FIRSTCLASS</td><td>Lubricator - 1st Class</td><td></td><td></td><td>17.00</td><td>EAGLENA</td></tr>
<tr><td>LUB</td><td>APPRENTICE</td><td>Lubricator Apprentice</td><td></td><td></td><td>13.75</td><td>EAGLENA</td></tr>
<tr><td>MACH</td><td></td><td>Machinist</td><td></td><td></td><td>18.00</td><td>EAGLENA</td></tr>
<tr><td>MACH</td><td>FIRSTCLASS</td><td>Machinist 1st Class</td><td></td><td></td><td>24.00</td><td>EAGLENA</td></tr>
<tr><td>MACH</td><td>SECONDCLASS</td><td>Machinist 2nd Class</td><td></td><td></td><td>20.00</td><td>EAGLENA</td></tr>
<tr><td>MACH</td><td>THIRDCLASS</td><td>Machinist 3rd Class</td><td></td><td></td><td>18.00</td><td>EAGLENA</td></tr>
<tr><td>MACH</td><td>APPRENTICE</td><td>Machinist Apprentice</td><td></td><td></td><td>16.00</td><td>EAGLENA</td></tr>
<tr><td>OLM</td><td></td><td>Overhead Line Maintenance</td><td></td><td></td><td>22.00</td><td>EAGLENA</td></tr>
</table>
</td></tr>
<tr><td>5</td><td>Find and select the HARDWARE (Hardware Technician) craft.
Result: The Select Value dialog box closes, and populates the Craft field with the selected value: HARDWARE.</td></tr>
<tr><td>6</td><td>Enter 4:00 into the Regular Hours field.
Result: Maximo calculates the Line Cost based on the rate.
Note: In this exercise we used the total time for the craft because we are using one craft for the entire job. If you were using different crafts for different tasks, you would enter the planned time for each craft for each task.</td></tr>
</table>

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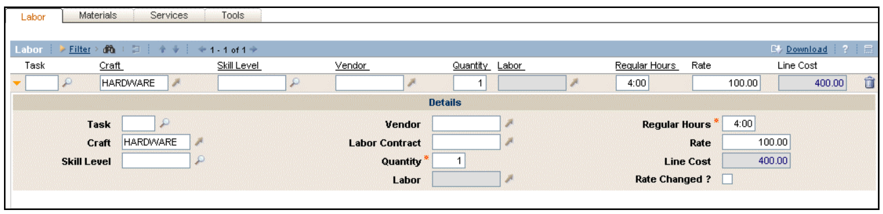
Planning the Change continued

Exercise: Adding Labor to the Work Plan

continued

Step	Action
7	**Save** the record. Result: Your Labor subtab should look similar to this. 
8	Do *not* close the **Changes** application; we will start the next exercise from this point.

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Planning the Change continued

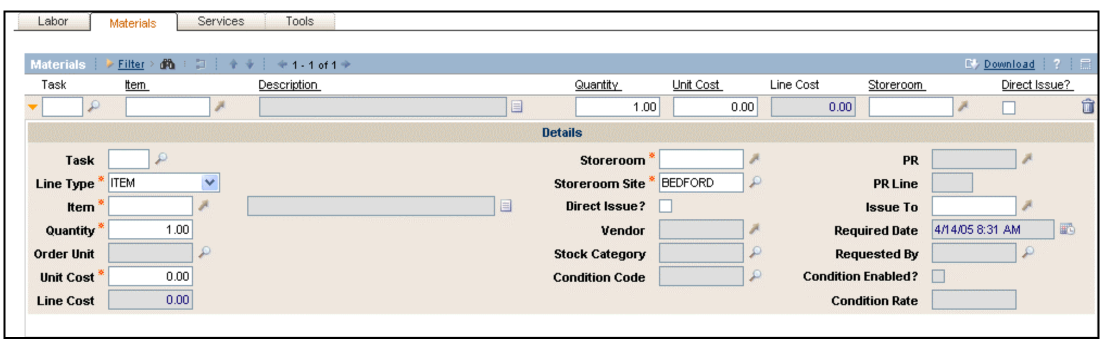
The Materials Subtab

You use the **Materials** subtab of the Plans tab to insert, view, or edit planned materials or items for a change. If the work plan is based on a job plan, Maximo copies all tasks and plan data from the job plan to the work plan. When you enter an item number in the Materials subtab, the item's description, location, category, and unit cost are copied from the Inventory storeroom record.

You can plan materials in any of the following ways:

- Select multiple items at once.
- Select materials from vendor catalogs.
- Select spare parts associated with the work order's asset.
- Plan individual materials.

In this scenario, we will use the **New Row** button to select individual materials. However, feel free to click on the other buttons to view their dialog boxes.



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Planning the Change continued

Exercise: Adding Materials to the Work Plan

Scenario: Recall that user Henry Lowe submitted an SR to the service desk via e-mail that his hard drive was making a funny noise. Tier 1 Agent Bill Sinclair received and reviewed the SR.

From the created incident, Tier 3 Hardware Group Agent George Ramsdale created a problem ticket. He investigated the problem and determined the cause. From the problem ticket, he created a change to replace the user's hard drive.

Use the following steps to add planned materials to the change (work order).

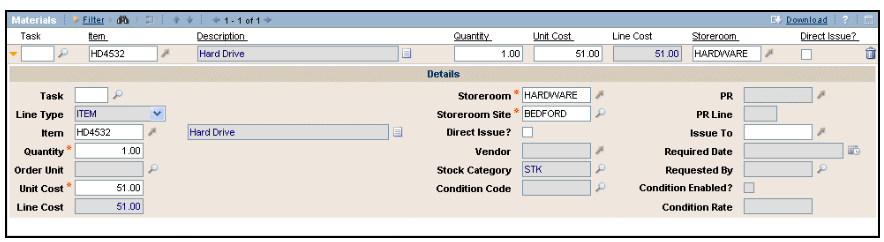
Step	Action
1	Ensure that you have the **Changes** application open to the **Plans** tab for the change originating from the SR submitted by Henry Lowe, which has the following description: **My hard drive *xx* is making a noise.**
2	Select the **Materials** subtab, then click its **New Row** button. Result: The Materials subtab opens a new row for editing.
3	Leave the **Task** field blank (*default*), because the selected material applies to the entire job.
4	For the **Item** field, use the **Detail Menu** and choose **Select Value**. Result: The Select Value dialog box for the Item field opens.
5	Find and select the **HD4532** (Hard Drive) item. Result: The Select Value dialog box closes, and populates the Item field with the selected value: HD4532.
6	For the **Storeroom** field, use the **Detail Menu** and choose **Select Value**. Result: The Select Value dialog box for the Storeroom field opens.

continued on next page

Planning the Change continued

Exercise: Adding Materials to the Work Plan

continued

Step	Action
7	Find and select the **Hardware** storeroom. Result: The Select Value dialog box closes, and populates the Storeroom field with the selected value: HARDWARE. Note: If there were none available in the storerooms, you would select this item as a direct issue. Direct issues require a purchase request, which is beyond the scope of this course. The MRO Software *Purchasing with MXES* course thoroughly covers the Maximo purchasing functionality.
8	**Save** the record. Result: Your Materials subtab should look similar to this. 
9	Do *not* close the **Changes** application; we will start the next exercise from this point.

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Planning the Change continued

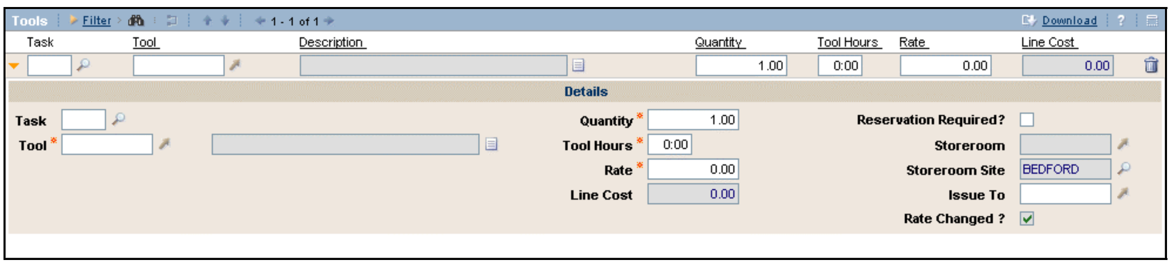
The Tools Subtab

You use the **Tools** subtab of the Plans tab to insert, view, or edit planned tool requirements for a change. The Select Tools dialog box allows you to apply multiple tools at once to a change. When the change is approved, Maximo reserves the tools if they are in a storeroom. If the work plan is based on a job plan, Maximo copies all tasks and plan data from the job plan to the work plan.

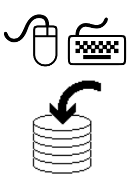
You can plan tools in either of the following ways:

- Select multiple tools at once.
- Plan individual tools.

In this exercise, we will select multiple tools at once.



Exercise: Adding Tools to the Work Plan



<u>Scenario</u>: Recall that user Henry Lowe submitted an SR to the service desk via e-mail that his hard drive was making a funny noise. Tier 1 Agent Bill Sinclair received and reviewed the SR.

From the created incident, Tier 3 Hardware Group Agent George Ramsdale created a problem ticket. He investigated the problem and determined the cause. From the problem ticket, he created a change to replace the user's hard drive.

Use the following steps to add planned tools to the change (work order).

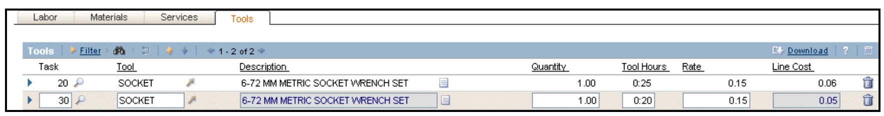
Step	Action
1	Ensure that you have the **Changes** application open to the **Plans** tab for the change originating from the SR submitted by Henry Lowe, which has the following description: **My hard drive *xx* is making a noise.**

continued on next page

Planning the Change continued

Exercise: Adding Tools to the Work Plan

continued

Step	Action
2	Select the **Tools** subtab.
3	Based on what you have learned so far, add two new rows for tools using the following information: **<u>Task</u>** **<u>Tool</u>** 20 SOCKET 30 SOCKET
4	**Save** the record. <u>Result</u>: Your Tools subtab should look similar to this. 
5	Do *not* close the **Changes** application; we will start the next exercise from this point.

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Planning the Change continued

The Services Subtab

You use the **Services** subtab of the Plans tab to view services and add line types of Service or Standard Service (STD SERVICE) to the work plan. Standard services are services such as grounds maintenance, janitorial services, or freight, for which your company may maintain a vendor catalog.

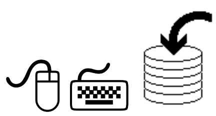
If the change was created with a job plan, Maximo copies the services and all related information from the job plan to the Services subtab.

You can plan services in either of the following ways:

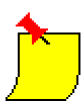
- Select multiple services at once.
- Plan services individually.

We will not be adding any services to the work plan in this scenario.

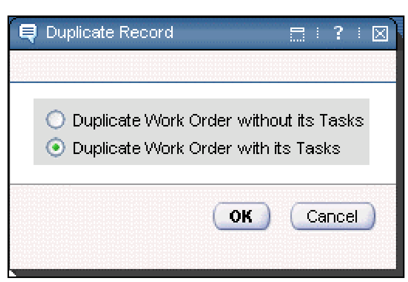
Prerequisite Exercise



Scenario: In this prerequisite exercise, you will duplicate the change record for the scenario we have been working on.



Note: You need to complete this prerequisite exercise so that exercises that follow in a later section will work.

Step	Action
1	Ensure that you have the **Changes** application open to the change originating from the SR submitted by Henry Lowe, which has the following description: **My hard drive *xx* is making a noise.**
2	Choose **Duplicate Change** from the **Select Action** menu. Result: A dialog box opens. 

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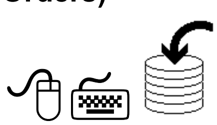
Planning the Change continued

Prerequisite Exercise

continued

Step	Action
3	Click to select **Duplicate Work Order with its Tasks**, and then click **OK**. Result: Maximo duplicates the change record. Write the duplicate change # here: ____________________.
4	In the **Summary** field, add the word duplicate.
5	**Save** the record.
6	Approve the *duplicate* change (work order). Hint: Change the status to APPR.
7	**Save** the record, but do *not* return to the Start Center.

Exercise: Approving the Change (Work Orders)



Scenario: Recall that user Henry Lowe submitted an SR to the service desk via e-mail that his hard drive was making a funny noise.

From the created incident, Tier 3 Hardware Group Agent George Ramsdale created a problem ticket. From the problem ticket, he created a change to replace the user's hard drive.

Use the following steps to approve the change (work order).

Step	Action
1	Ensure that you have the **Changes** application open to the **Plans** tab for the change originating from the SR submitted by Henry Lowe, which has the following description: **My hard drive *xx* is making a noise.** Note: This is *not* the duplicate change work order record.
2	Approve the change (work order).
3	**Save** the record, then return to the **Start Center**.

Job Plans

Introduction

A job plan is the heart of a proactive maintenance program, as it represents the accumulated knowledge of the manufacturer, skilled mechanic, technician, and engineer. It indicates what to do, what to use, what to look for, how to do it, and when to do it. In Maximo, job plans are used as templates for changes (work orders) that have been associated to a record in the Changes application.

Job plans are also used in work management, which is beyond the scope of this course. The MRO Software *Work Management Using MXES* course can help you learn how to use Maximo for work management.

Purposes

Use job plans to:

- estimate the operations, materials, labor, and tools required for maintenance tasks before the work is requested; and
- establish a template for maintenance work that is repetitive (for example, major overhaul, monthly preventive maintenance program work).

✓ Doc Palmer, a well-known work management expert, says: “One effective planner is as effective as seven technicians.”

Job Plans

A *job plan* is a detailed description of the work tasks, labor, materials, services, and tools to be performed for a particular type of job. You use job plans as templates.

Work Plans

A *work plan* describes the labor, materials, services, tools, and tasks needed to complete specific work. An easy way to add a work plan to a change (work order) is to associate a job plan with the change (work order) and modify it as necessary. Changes made to the work plan do not affect the original job plan.

Entering Actuals

Introduction

There are different types of changes:

- Standard: Everyday changes.
- Minor: Some impact on business, to infrastructure.
- Major: Significant impact on business, to infrastructure.

Changes to configuration items (CIs) affect the Configuration Management Database (CMDB). The MRO Software *IT Asset Configuration and Management in MXES* course has more information on this subject.

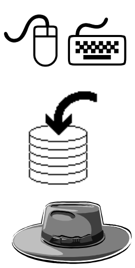
Scenario

Scenario: Recall that user Henry Lowe submitted an SR to the service desk via e-mail that his hard drive was making a funny noise.

From the created incident, Tier 3 Hardware Group Agent George Ramsdale created a problem ticket. From the problem ticket, he created a change to replace the user's hard drive.

As Change Manager Mike Wilson, you created a work plan and approved the change.

Exercise: Assigning the Work



Now you will assign George Ramsdale from the hardware group to work on this change.

Use the following steps.

Step	Action
1	Sign in to Maximo as Change Manager Mike Wilson. Result: Maximo displays the Start Center assigned to Mike Wilson.

continued on next page

Entering Actuals continued

Exercise: Assigning the Work

continued

Step	Action
2	Open the **Changes** application, then find and select the change originating from the SR submitted by Henry Lowe, which has the following description: **My hard drive *xx* is making a noise.** Note: This is *not* the duplicate change record. Result: The Changes application opens.
3	Choose **Select Owner** from the **Select Action** menu. Result: The Select Owner dialog box opens.
4	On the **Person** tab, find and select **George Ramsdale**. Result: George Ramsdale is assigned to work on this change.
5	**Save** the record and return to the **Start Center**.

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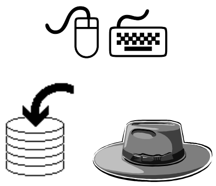
Entering Actuals continued

Exercise: Entering the Actual Labor



Scenario: Recall that user Henry Lowe submitted an SR to the service desk via e-mail that his hard drive was making a funny noise.

From the created incident, Tier 3 Hardware Group Agent George Ramsdale created a problem ticket. From the problem ticket, he created a change to replace the user's hard drive. As Change Manager Mike Wilson, you created a work plan and approved the change.

As George Ramsdale, you received notification to work on the change record. Use the following steps to start the timer and perform the work.

Step	Action
1	Sign in to Maximo as Hardware Technician George Ramsdale. Result: Maximo displays the Start Center assigned to George Ramsdale.
2	Open the **Changes** application, then find and select the change originating from the SR submitted by Henry Lowe, which has the following description: **My hard drive *xx* is making a noise.** Note: This is *not* the duplicate change record. Result: The Changes application opens.
3	Change the status to **INPRG** and start the timer.
4	Because this is a training environment, you will need to simulate the (planned) 4 hours that George Ramsdale needs to work on this change. Because it took him 3:45, stop the timer, enter 3:45 into the **Hours** field, and then click **OK**.
5	**Save** your record, but do *not* return to the Start Center. We will be starting the next exercise from this point.

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Entering Actuals continued

Exercise: Alternative for Entering Actual Labor

In the previous exercise, we used the timer to record the actual labor. There will be situations where this is not possible.

<u>Example</u>: A major or a significant change might require several different crafts to perform the various tasks. The lead craft (the change owner) could use the timer; however, the other crafts' labor would have to be reported.

Although in this scenario it is only a minor change requiring just one craft, we will demonstrate reporting labor as if there were different crafts required for this change.

Use the following steps.

Step	Action
1	Sign in to Maximo as Hardware Technician George Ramsdale. <u>Result</u>: Maximo displays the Start Center assigned to George Ramsdale.
2	Open the **Changes** application, then find and select the change originating from the SR submitted by Henry Lowe, which has the following description: **My hard drive *xx* is making a noise.** <u>Note</u>: This is *not* the duplicate change record. <u>Result</u>: The Changes application opens.
3	Click the **Actuals** tab. <u>Result</u>: There should be a row for Labor George Ramsdale. Maximo records all the time that you, as George Ramsdale, are working on this change.

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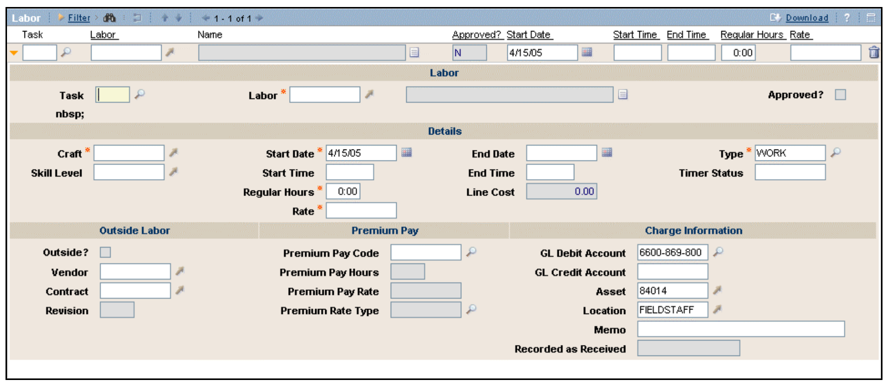
Entering Actuals continued

Exercise: Alternative for Entering Actual Labor

continued

Step	Action
4	Make sure the **Labor** subtab is selected, then click **New Row**. Result: A new row opens for editing. 
5	Choose **Select Value** on the **Detail Menu** for the **Labor** field. Result: The Select Value dialog box opens.
6	On the **Person** tab, find and select: **RAMSDALE George Ramsdale HARDWARE** Result: RAMSDALE populates the Labor field.
7	Enter a value (simulated) for the **Start Time** and **Regular Hours** fields. Use the **Tab** key to tab out of the last field. Result: Notice the calculated values.

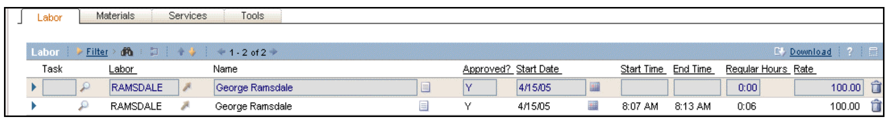
continued on next page

Entering Actuals continued

Exercise: Alternative for Entering Actual Labor

continued

Step	Action
8	**Save** the record, but do *not* return to the Start Center. We will start the next exercise from here. Result: Your display should look similar to this one, although it will have different values in the Start Time, End Time, and Regular Hours fields.



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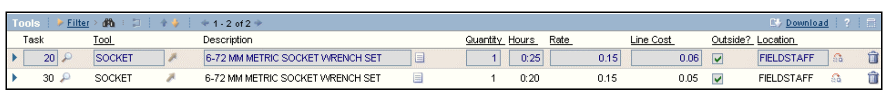
Entering Actuals continued

Exercise: Entering the Actual Tools Used

Scenario: As George Ramsdale, you received notification to work on the change work order, you completed the work, and now you will report the actual tools used.

Use the following steps.

Note: The complexity of issuing a new hard drive requires a Move/Modify Asset; therefore, we will first record actuals for tools. Then we will come back to recording actuals for materials.

Step	Action
1	Ensure that you have the **Changes** application open to the **Actuals** tab for the change work order originating from the SR submitted by Henry Lowe, which has the following description: **My hard drive *xx* is making a noise.**
2	Using the information that you have learned so far: • Select the **Tools** subtab. • Select the **Planned Tools**. • Accept the default values. • **Save** the record. Result: Your Tools subtab should look similar to this. 

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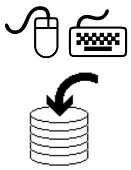
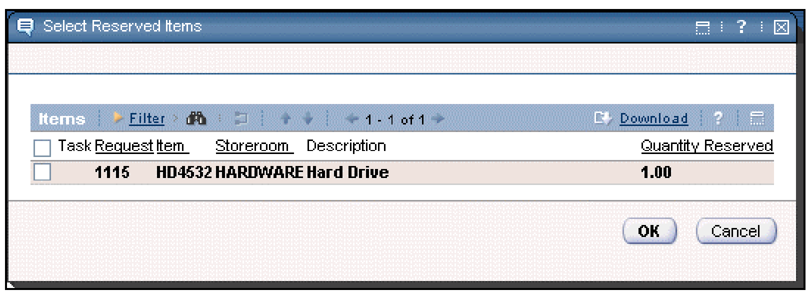
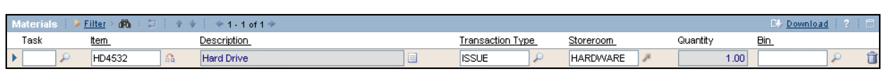
Entering Actuals continued

Exercise: Entering the Actual Materials



Scenario: As George Ramsdale, you received notification to work on the change work order, you completed the work, and now you will report the actual materials used.

Use the following steps.

Step	Action
1	Ensure that you have the **Changes** application open to the **Actuals** tab for the change work order originating from the SR submitted by Henry Lowe, which has the following description: **My hard drive *xx* is making a noise.**
2	Select the **Materials** subtab, and then click **Select Reserved Items**. Result: The Select Reserved Items dialog box opens. 
3	In the **Select Reserved Items** dialog box, click to select **HD4532 HARDWARE Hard Drive**, then click **OK**. Result: The Select Reserved Items dialog box closes, and the Item field populates with HD4532. 

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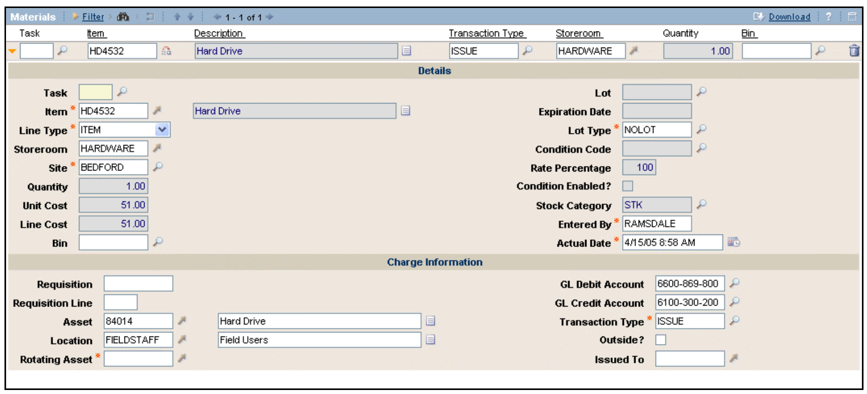
Entering Actuals continued

Exercise: Entering the Actual Materials

continued

Step	Action
4	For item **HD4532**, click **View Details**. Result: The Details section for this row opens. 
5	Notice the required field **Rotating Asset**. Hard drives are often entered into the CMDB as rotating CIs. (The *IT Asset Configuration and Management in MXES* course has more information on configuration management.)
6	Choose **Select Value** from the **Detail Menu** for the **Rotating Asset** field. Result: The Select Value dialog box opens.
7 	Find and select **2077***, then click **OK**. *Warning: If you are in an MRO Software hosted training environment, each participant must use a different asset number! If you are in a hosted environment, then use asset #**2077 – 2097**, as assigned by your instructor. Result: The Select Value dialog box closes, and populates the Rotating Asset field with the selected value.
8	**Save** the record, then return to the **Start Center**.

Using Assignment Manager

Introduction

A change is a type of work order, and especially complex work orders might typically require the following processes:

- Work is requested.
- Work is planned.
- Work is scheduled.
- Work is assigned.

You might follow these processes for either a major or a significant change.

The Assignment Manager Application

Use the Assignment Manager application to dispatch labor and schedule work in the same place. Using this application, you can view work order assignments and their craft, skill level, vendor, contract, and organization requirements. You can also dispatch labor according to work priority, or view labor and schedule work according to labor availability.

You can view only labor that applies to specific requirements, or only work order requirements that fit the craft, skill level, vendor, contract, organization requirements, calendar availability, or shift of displayed labor.

Assignment Manager's **Filter Labor to Match Work** and **Filter Work to Match Labor** actions dynamically link the Work List and Labor List, which facilitates assigning work to laborers.

Scenario

You would most likely consider using the Assignment Manager application for major changes. While this scenario might be considered a minor change, we will use the duplicated change to demonstrate the use of Assignment Manager.

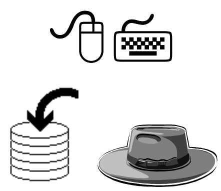
Scenario: Recall that user Henry Lowe submitted an SR to the service desk via e-mail that his hard drive was making a funny noise. From the created incident, Tier 3 Hardware Group Agent George Ramsdale created a problem ticket. He submitted a change request to replace Henry Lowe's hard drive.

Change Manager Mike Wilson planned and approved the change. Now we will use the Assignment Manager application to schedule and assign the work for the duplicated change.

continued on next page

Using Assignment Manager continued

Exercise: Assigning the Work



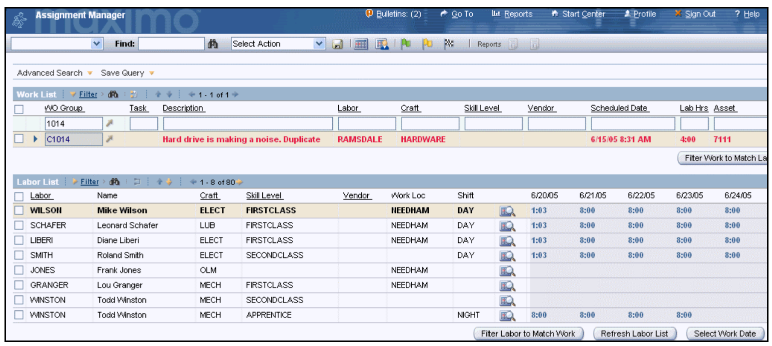
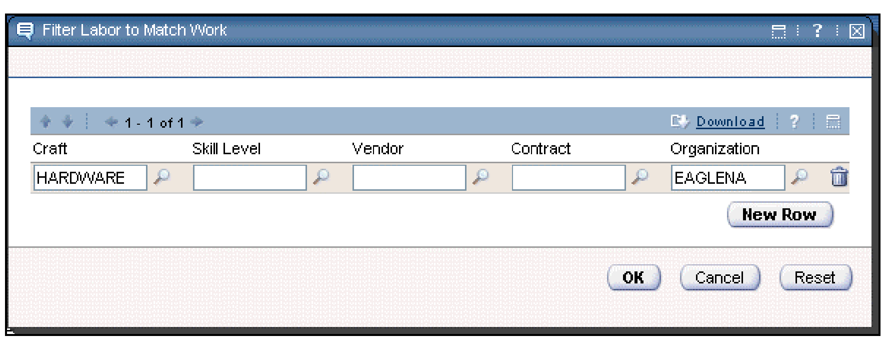
Use the following steps to assign the work.

Step	Action
1	Sign in to Maximo as Mike Wilson. Result: Maximo displays the Start Center assigned to Mike Wilson.
2	Open the **Assignment Manager** application (**Go To** > **Work Orders** > **Assignment Manager**). Result: The Assignment Manager application opens.
3	Because Assignment Manager is used for all work order types, we will narrow the search capacity to changes without their child tasks. Click the **Advanced Search** button. Result: The Advanced Search dialog box opens.
4	In the **Advanced Query** dialog box, enter the following values and then click **OK**. • Use the **Select Value** button to enter =CHANGE in the **Work Order Class** field. • Enter **N** in the **Is Task?** field, and click **Find**. Result: Maximo displays the results for the Advanced Query criteria.

continued on next page

Using Assignment Manager continued

Exercise: Assigning the Work continued

Step	Action
5	In the **Work List** section, filter the list for your *duplicate* change (work order). Result: Maximo displays your change work order. Change C1013 is depicted in the following graphic. Your display should be similar. 
6	Click to select your *duplicate* change work order, as follows: 
7	Click the **Filter Labor to Match Work** button in the **Labor List** section.  Result: The Filter Labor to Match Work dialog box opens. 

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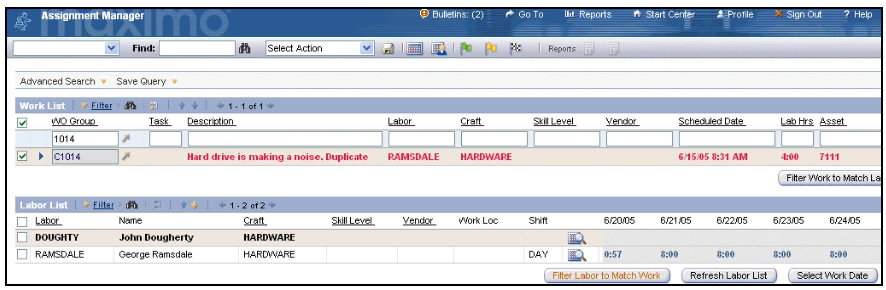
Using Assignment Manager continued

Exercise: Assigning the Work

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>In the Craft field, enter HARDWARE, tab out of the field, and then click OK.

<u>Result</u>: The Filter Labor to Match Work dialog box closes, and Maximo displays the filtered results.


</td></tr>
<tr><td>9</td><td>Click to select RAMSDALE (George Ramsdale), as follows:


</td></tr>
<tr><td>10</td><td>Save the duplicate record, but do not return to the Start Center. We will begin the next exercise from this point.</td></tr>
</table>

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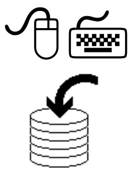
Using Assignment Manager continued

Exercise: Schedule the Work



Use the following steps to schedule the work.

<u>Note</u>: Although there are several ways to both assign and schedule work, it is beyond the scope of this course. There is much more to both scheduling and assigning work as a part of work management; both subjects are covered in detail in the MRO Software *Work Management Using MXES* course.

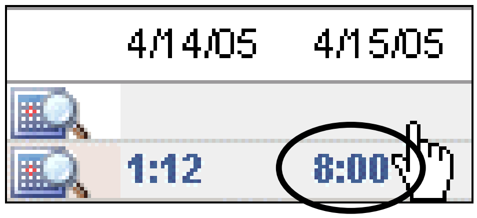
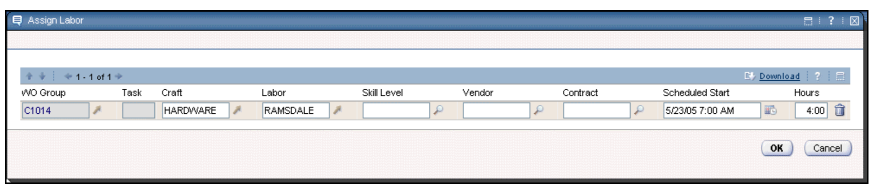
Step	Action
1	Ensure that you have the **Assignment Manager** application open to the *duplicate* change work order that came from the SR submitted by Henry Lowe, which has the following description: **My hard drive *xx* is making a noise (*duplicate*).**
2	Click to select your *duplicate* change work order, as follows: 

continued on next page

Using Assignment Manager continued

Exercise: Schedule the Work

continued

Step	Action
3	Looking at the schedule for George Ramsdale, select the first available date where he has a block of 4 hours available to work on the change work order. <u>Example</u>: Each time this course is held, the values available will differ. Using the example depicted below, you would choose **4/15/05** because **8** hours are available.  You would choose this date by clicking on the **8:00** under the 4/15/05 column. <u>Result</u>: Maximo might display an Assign Labor dialog box. 

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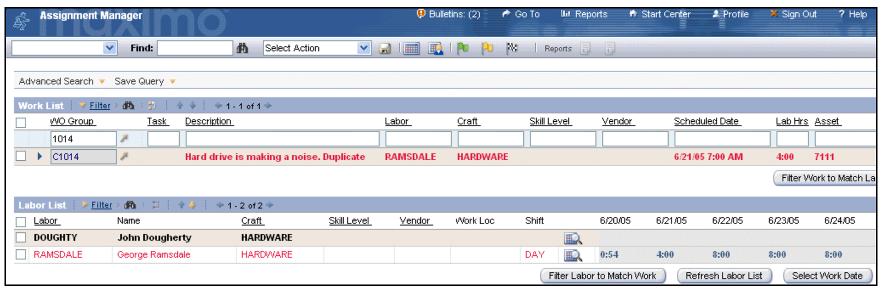
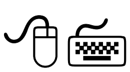
Using Assignment Manager continued

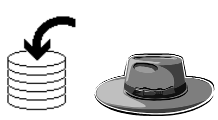
Exercise: Schedule the Work

continued

Step	Action
4	If Maximo does display the **Assign Labor** dialog box, accept the default values, then click **OK**. <u>Result</u>: George Ramsdale is scheduled to work on your *duplicate* change work order on the selected date. Notice that his available time decreases. In this example, it decreases from 8 hours to 4 hours. 
5	**Save** the *duplicate* change record and return to the **Start Center**.

Exercise: Entering the Actual Labor





<u>Scenario</u>: As George Ramsdale, you received notification to work on the *duplicate* change work order, you completed the work in 4 hours, and now you will report the actual labor/labor hours.

Use the following steps.

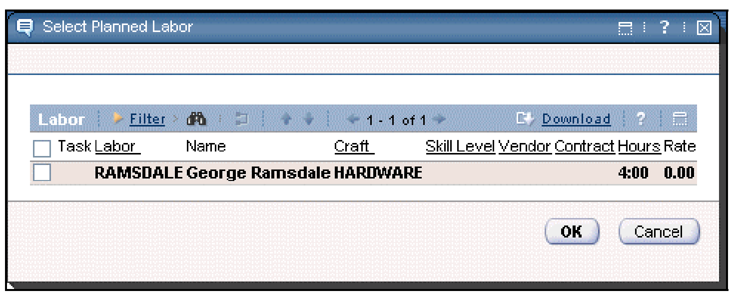
Step	Action
1	Sign in to Maximo as George Ramsdale. <u>Result</u>: Maximo displays the Start Center assigned to George Ramsdale.

continued on next page

Using Assignment Manager continued

Exercise: Entering the Actual Labor

continued

Step	Action
2	Open the **Changes** application, then find and select the *duplicate* change originating from the SR submitted by Henry Lowe, which has the following description: **My hard drive *xx* is making a noise (*duplicate*).** Result: The Change tab opens to the duplicate SR.
3	Click the **Actuals** tab. Result: Maximo displays the Actuals tab.
4	Ensure that the **Labor** subtab is selected, then click the **Select Planned Labor** button. Result: The Select Planned Labor dialog box opens. 

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Using Assignment Manager continued

Exercise: Entering the Actual Labor

continued

Step	Action
5	In the **Select Planned Labor** dialog box, click to select **RAMSDALE George Ramsdale Hardware**, then click **OK**. Result: The Select Planned Labor dialog box closes, and the Labor field populates with RAMSDALE.
6	Enter a start time and end time as follows: • The total duration should be 4 hours. • The **End Time** should be earlier than the current system time displayed on your computer.
7	**Save** your *duplicate* change record, then return to the **Start Center**.

Completing the Change

Introduction

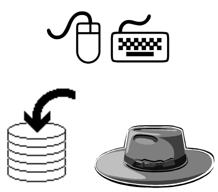
After actuals are reported for a change, you can complete the change.

Scenario

Scenario: Recall that user Henry Lowe submitted an SR to the service desk via e-mail that his hard drive was making a funny noise.

From the created incident, Tier 3 Hardware Group Agent George Ramsdale created a problem ticket. From the problem ticket, he created a change to replace the user's hard drive. As Change Manager Mike Wilson, you created a work plan and approved the change.

Exercise: Complete the Change



As George Ramsdale, you completed the change and reported the actual work performed. Use the following steps to complete the change record in Maximo.

Step	Action
1	Sign in to Maximo as George Ramsdale. Result: Maximo displays the Start Center assigned to George Ramsdale.
2	Open the **Changes** application, then find and select the change originating from the SR submitted by Henry Lowe, which has the following description: **My hard drive *xx* is making a noise.** Note: This is *not* the duplicate. Result: The Changes application opens.
3	Perform the following steps: • Change the status to **COMP** (Completed). • Complete a work log entry. • **Save** the record.

continued on next page

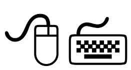
Completing the Change continued

Exercise: Complete the Change

continued

Step	Action
4	From the **Select Action** menu, choose **View > History**.
5	When you are done viewing the history, click **OK**.
6	From the **Select Action** menu, choose **View > Costs**.
7	When you are done viewing the costs, click **OK**.
8	Return to the **Start Center** and sign out of Maximo.

Exercise: Changing the Status for the Originating Related Records



Recall that the change was generated from a problem ticket, which was generated from an incident, which was generated from an SR. Now that you have closed the change, because of the Related Records link within Maximo, you can now close all of the related records. See the following note.

Note: Whether related records are closed when the succeeding record is closed depends on a system setting. Some system settings are held and set in a database object named MAXVARS. The MRO Software *System Administration for MXES* course provides more information.

If MAXVARS is not set, then only SRs will be closed when incidents are closed.

Use the following steps.

Step	Action
1	Sign in to Maximo as Mike Wilson. Result: Maximo displays the Start Center assigned to Mike Wilson.
2	Open the **Changes** application, then find and select the change originating from the SR submitted by Henry Lowe, which has the following description: **My hard drive *xx* is making a noise.** Result: The Change tab opens to the SR.

continued on next page

Completing the Change continued

Exercise: Changing the Status for the Originating Related Records

continued

Step	Action
3	Select the **Related Records** tab. Result: Notice that the originating problem ticket needs to be completed (COMP).
4	Choose **Go To Problems** from the **Detail Menu** for the **Originating Record** field, then close the originating problem ticket.
5	Select the **Related Records** tab for the problem ticket, then choose **Go To Incidents** from the **Detail Menu** for the **Originating Record** field, and close the originating incident ticket.
6	Select the **Related Records** tab for the incident ticket, then look at the status of the originating SR ticket. Result: The originating SR should also now have a status of Closed.
7	Click the **Return** link until you are back in the **Changes** application.
8	Sign out of Maximo.

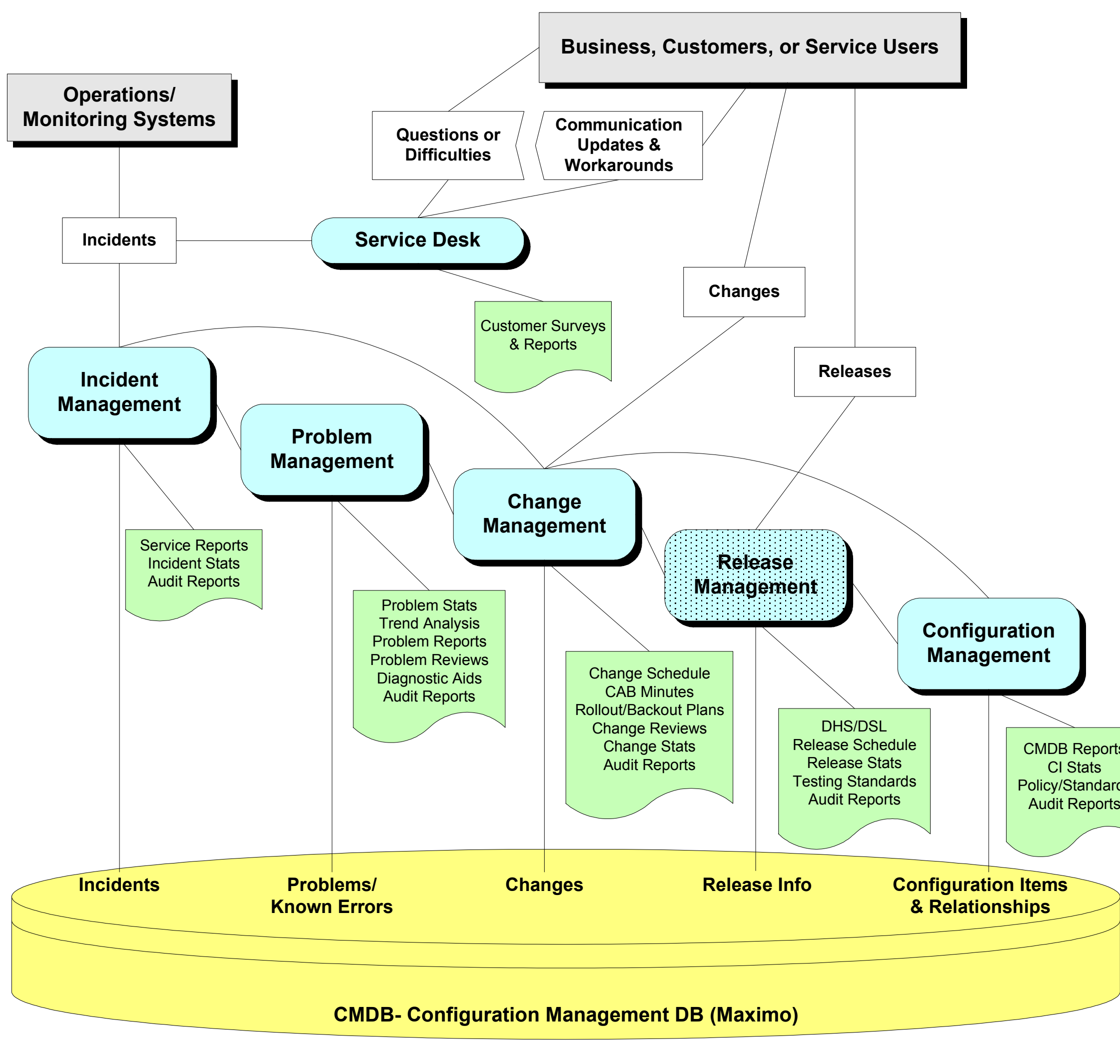
Release Management

Introduction

In the previous section, we went through a scenario for change management for a minor change. In this section, we will build on that knowledge by looking at where release management falls within IT Service Management.

You Are Here

Recall this diagram depicting the various IT Service Management processes. Notice the dotted background for Release Management. Throughout this section, we will be discussing the release management process in Maximo.



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Release Management continued

Goal

The goal of release management is to take a holistic view of a change to an IT service and ensure that all aspects of a release, both technical and non-technical, are considered together.

Definitions

Definitive Software Library (DSL): The DSL contains the master copies of all controlled software, including purchased software, as well as onsite-developed software.

Definitive Hardware Store (DHS): The DHS is an area that should be set aside for the secure storage of definitive hardware spares.

Release: A release is a collection of authorized changes to an IT service.

Release Unit: A release unit is the portion of the IT infrastructure that is normally released together.

Rollout: A rollout is the delivery, installation, and commissioning of an integrated set of new or changed CIs across logical or physical parts of an organization.

Release Types

Full Release: In a full release, all components of the release are built, tested, distributed, and implemented together.

Delta Release: In a delta release, only those CIs that have actually changed since the last release are included.

Package Release: In a package release, individual releases, both full and delta, are grouped together to form a package for release.

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Release Management continued

Responsibilities

Release management coordinates the many service providers and suppliers involved with a significant release of hardware, software, and associated documentation across a distributed environment.

The actual roles and responsibilities of release management will depend on the procedures that your organization has put into place. Some of these might typically include:

- Planning and overseeing the successful rollout of new and changed software and associated hardware and documentation
- Reaching agreement with change management on the exact content and rollout plan for the release
- Ensuring that all items being rolled out or changed are secure and traceable via the CMDB
- Managing customers' and users' expectations of releases and rollouts

The Releases Application

Introduction

Maximo supports release management through the Releases application.

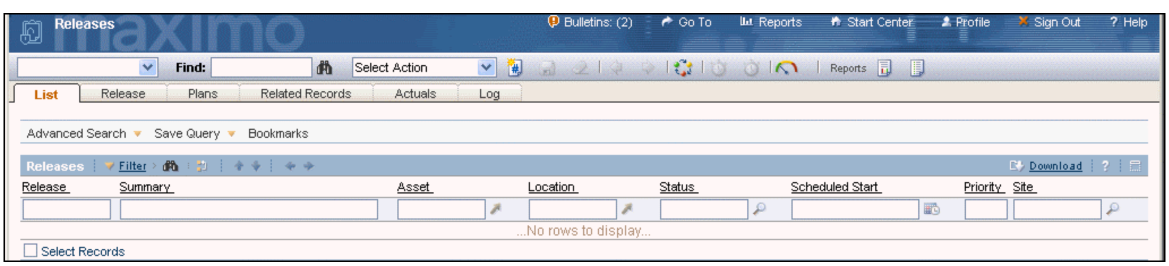
The Changes Application

You use the Releases application to plan, review, and prepare for large batches of changes to assets. You use releases to manage the release of authorized versions or configurations of assets into a production environment for large or critical hardware rollouts, for major software rollouts, and for bundling related sets of changes. Releases detail the tasks, scheduling, and people or groups involved in the release.

Releases Application Tabs

The Releases application contains the following tabs:

- **List** to search the database for releases using any combination of available fields.
- **Release** to create, view, and modify releases; to view scheduling information and the areas affected by the release.
- **Plans** to enter, view, and modify job tasks and labor, material, services, and tool requirements for the work plan.
- **Related Records** to view, add, and delete related work orders and tickets; to view follow-up records for the current record.
- **Actuals** to enter, view, and modify actual work order start and finish times, labor hours and costs, material quantities, locations, costs, and tool quantities, hours and costs.
- **Log** to view and create work log and communication entries about the current record.



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The Releases Application continued

Note

Notice the close similarity between the Changes application and the Releases application. While the applications in Maximo are nearly identical, they are two separate and distinct processes, though very much related.

Release Statuses

Every work order (including changes) in Maximo has a status value that indicates its position in the work order processing cycle.

(The term *work order* can refer to a work order, a change, a release, or an activity record.)

Work orders can be created with different statuses, depending on which application you use to create or generate them. You might need security authorization to select each status option.

If you change the status of a work order that has child work orders with their **Inherit Status Changes** check box selected, Maximo also applies the status change to the child work orders, if appropriate.

You use the **Change Status** option from the Select Action menu to change the status of one or more records. You can "skip over" some statuses when you select advanced statuses, such as in the processing cycle.

To view previous status changes for a work order, select **View > History** from the Select Action menu.

Work orders can have any of the statuses shown in the following table.

continued on next page

The Releases Application continued

Release Statuses

continued

Status	Description
WAPPR (Waiting for Approval)	This is the default status for records that you create in the Work Order Tracking, Changes, Releases, and Activities applications.
APPR (Approved)	This status indicates the work plan has been approved and the work can begin. You can report actuals against approved work orders.
WSCH (Waiting to be Scheduled)	Default status for work orders you generate from Preventive Maintenance and Condition Monitoring records. You can change the default status on the PM record.
WMATL (Waiting on Material)	This status indicates that materials must arrive before the work can be performed.
WPCOND (Waiting on Plant Condition)	This status indicates that the work will be performed when the plant's condition makes the work possible. For example, if the plant is operating and the work must be performed while the plant is shut down, the work order is waiting on the plant condition.
INPRG (In Progress, or Initiated)	This is the default status for work orders that you create in Quick Reporting.
COMP (Completed)	This status indicates that all the physical work has been completed.
CLOSE (Closed)	This status finalizes the work order. When you close a work order, Maximo removes inventory reservations for items that were not used on the work order, and makes the work order a history record.
CAN (Canceled)	This status indicates the work will not be performed. If the work order has already been initiated or actuals have already been reported, you cannot change its status to CAN. If the selected work order had been approved, Maximo removes item reservations from Inventory for the work order, and makes the work order a history record.

Chapter Summary

Problem Management

The goal of problem management is to:

- minimize the adverse effect on the business of incidents and problems by errors in the infrastructure;
- proactively prevent the occurrence of incidents, problems, and errors; and
- identify the underlying cause of one or more incidents.

Using the Problems Application

You use the Problems application to create and modify problem records. You create a problem record to capture an unknown, underlying cause of one or more incidents. You resolve a problem when you identify its root cause so that similar incidents in the future are prevented or have a lesser business impact.

A problem record is a type of ticket. Other ticket types are service requests and incidents. The Problems, Incidents, and Service Requests applications are closely related and share many features. You can define relationships between tickets, link them for information purposes, and view details for them in the appropriate applications.

Change Management

The goal of change management is to ensure that standardized methods and procedures are used for efficient and prompt handling of all changes, in order to minimize the impact of any related changes upon service.

There are several types of changes:

- Standard: Everyday changes.
- Minor: Having little or no disruption in services.
- Major: Having a major impact on services.

continued on next page

Chapter Summary continued

The Changes Application

You use the Changes application to plan, review, and report actuals for implementing changes or deploying new, standard configurations to existing assets.

You also can create changes in other Maximo applications.

A change is a type of work order. Other types of work orders are releases and activities. Activities are actually child work orders.

There are different types of changes available in Maximo:

- Standard: Everyday changes.
- Minor: Some impact on business, to infrastructure.
- Major: Significant impact on business, to infrastructure.

Note: While your business practices might include additional change types, these three are available out-of-the-box in Maximo.

Planning the Change

You use the Plans tab to view, enter, and modify several types of work plan data on a work orders. A work plan describes the tasks, labor, materials, services, and tools needed to complete the work.

Job Plans

A job plan is the heart of a proactive maintenance program, as it represents the accumulated knowledge of the manufacturer, skilled mechanic, technician, and engineer. It indicates what to do, what to use, what to look for, how to do it, and when to do it. In Maximo, job plans are used as templates for changes (work orders) that have been associated to a record in the Changes application.

Use job plans to:

- estimate the operations, materials, labor, and tools required for maintenance tasks before the work is requested; and
- establish a template for maintenance work that is repetitive (for example, major overhaul, monthly preventive maintenance program work).

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Chapter Summary continued

Using Assignment Manager

Use the Assignment Manager application to dispatch labor and schedule work in the same place. Using this application, you can view work order assignments and their craft, skill level, vendor, contract, and organization requirements. You can also dispatch labor according to work priority, or view labor and schedule work according to labor availability.

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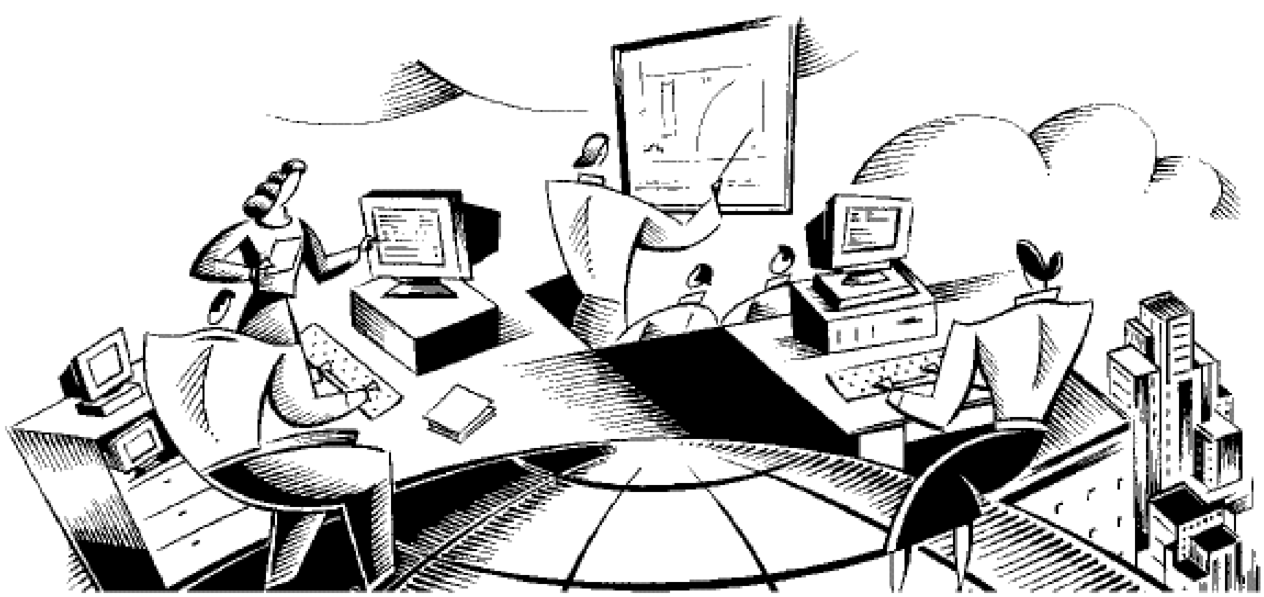
NOTES:

NOTES:

IT Service Management Using MXES

Chapter 8: Service Support Management



In This Chapter

This chapter contains the following topics:

Chapter Overview

Introduction

This chapter introduces Service Level Management. Maximo supports Service Level Management through service level agreements and reports. Reports help manage service support.

Chapter Focus

The focus of this chapter is twofold:

- Create and apply a service level agreement.
- Run and discuss several Service Management reports.

Learning Objectives

When you have completed this chapter, you should be able to:

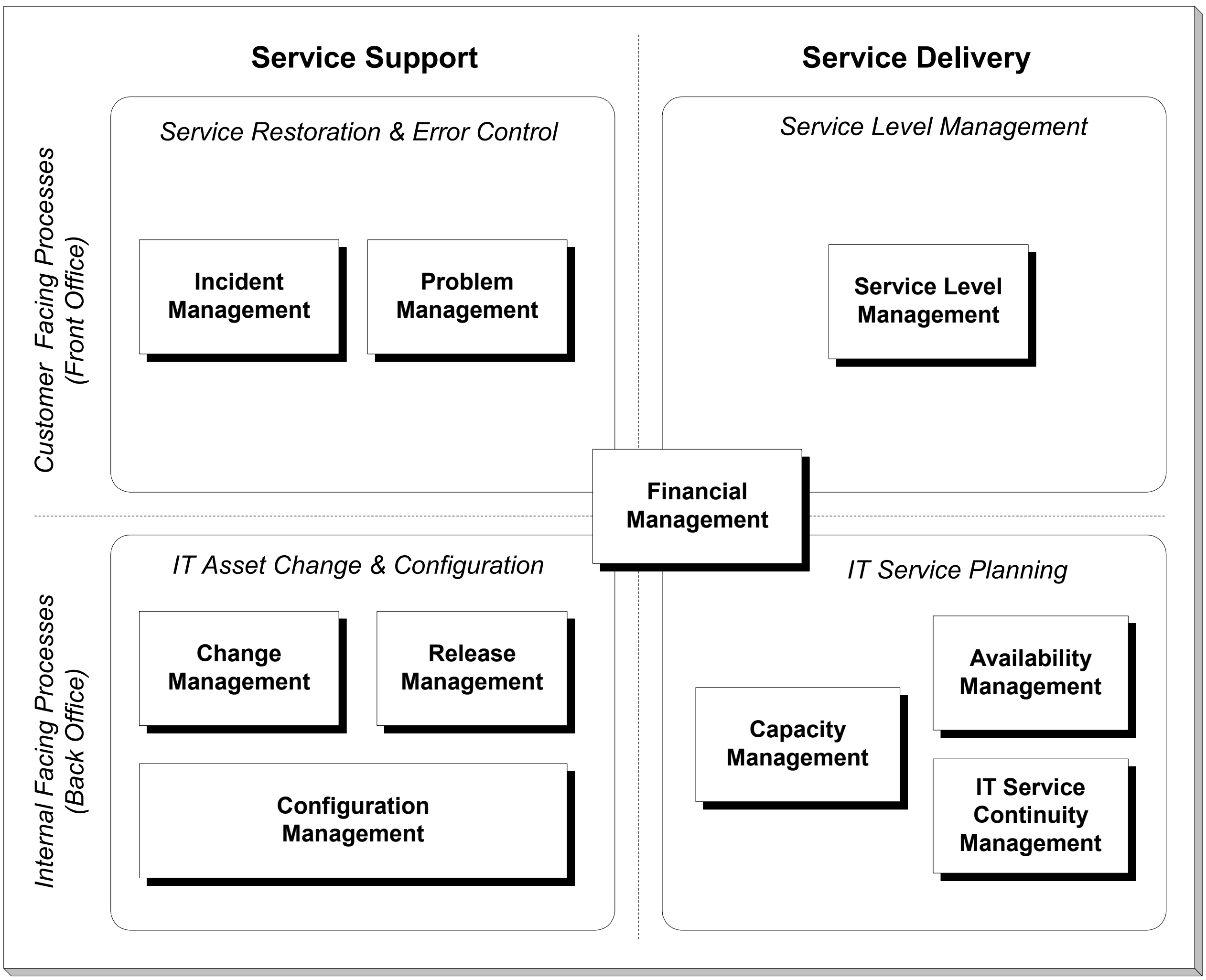
- Create a query
- Run reports
- Create an SLA
- Apply an SLA
- Run and use Service Management reports

Service Support Reporting

Introduction

Recall from Chapter 2 that Service Support, one of the two core areas within ITIL, encompasses Service Desk, Incident Management, Problem Management, Change Management, Release Management, and Configuration Management.

Note: Configuration management is beyond the scope of this course. However, it is covered in the MRO Software *IT Asset Configuration and Management in MXES* course.



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Service Support Reporting continued

Reports

Reporting is a valuable tool for use in managing the Service Desk function and the Service Support processes.

Some of the available reports for Service Support are:

- List Reports
    - Service Request List
    - Incident List
    - Problem List
- Detail Reports
    - Service Request Details
    - Incident Details
    - Problem Details
- Forward Scheduling
    - Forward Schedule of Changes
    - Forward Schedule of Releases
- Solutions
    - Service Desk Self Service Solution
    - Solutions List
    - Solutions Detail
    - Solution Application
- Tickets
    - Ticket Query
    - Open Tickets
- Service Support Management
    - Service Desk Contact Response and Resolution
    - Service Target Compliance Summary
    - Case Volume Summary

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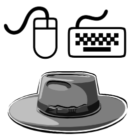
Service Support Reporting continued

Exercise: Running the Open Tickets Report

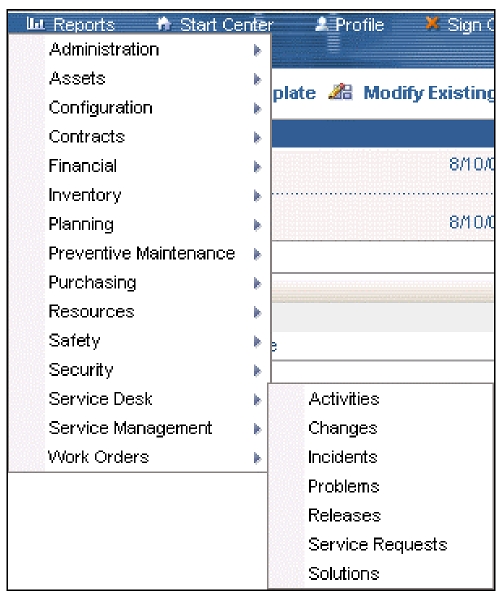


In this section, we will look at one report and one query.

- Tickets
  - Ticket Query
  - Open Tickets report

Using the following steps:

- Run the Open Tickets report.
- Answer the questions that follow.

Step	Action
1	Sign in to Maximo as Mike Wilson.
2	From the Navigation Bar, click the **Reports** link  . Result: Maximo displays the Reports menu. 

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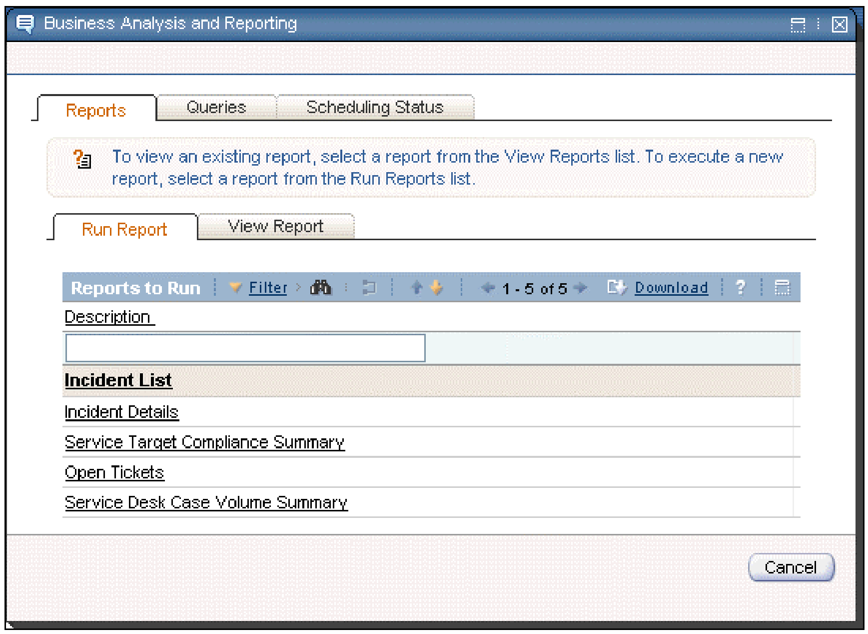
Service Support Reporting continued

Exercise: Running the Open Tickets Report

continued

Step	Action
3	Choose **Service Desk** > **Incidents**. Result: The Business Analysis and Reporting dialog box opens. 

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Service Support Reporting continued

Exercise: Running the Open Tickets Report

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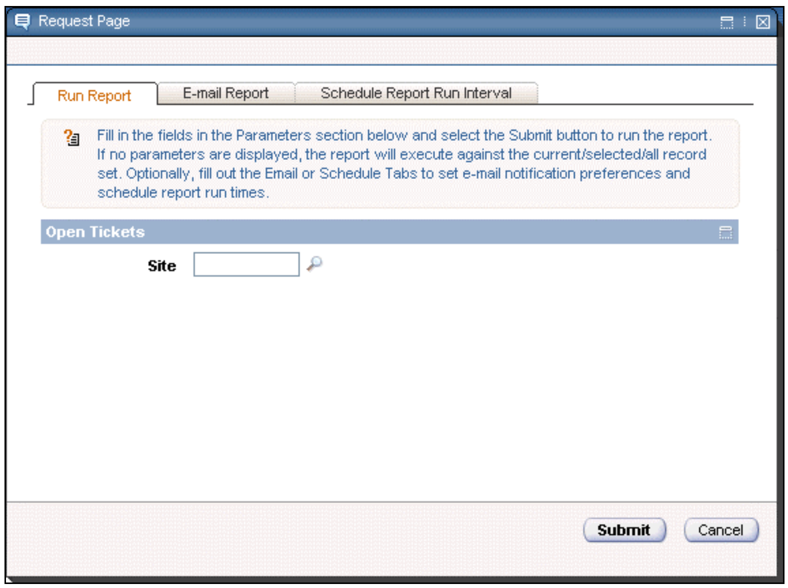
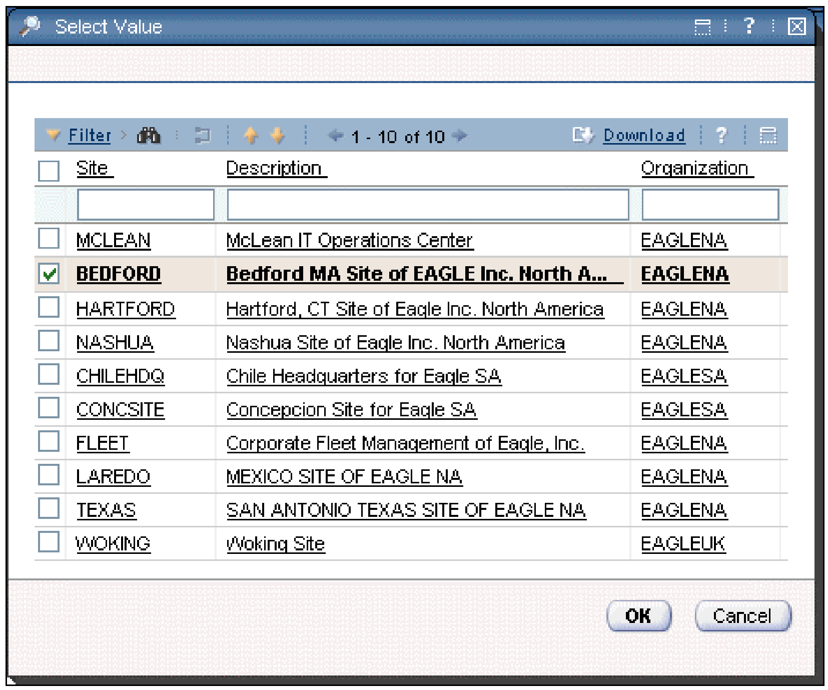
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Click to select Open Tickets.
<u>Result</u>: The Request Page for the Open Tickets report opens.

</td></tr>
</table>

continued on next page

Service Support Reporting continued

Exercise: Running the Open Tickets Report

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>In the Site field, click the Select Value icon.
Result: The Select Value dialog box opens.


</td></tr>
<tr><td>6</td><td>Choose BEDFORD, then click OK.
Result: The Select Value dialog box closes and populates the Site field with BEDFORD.</td></tr>
</table>

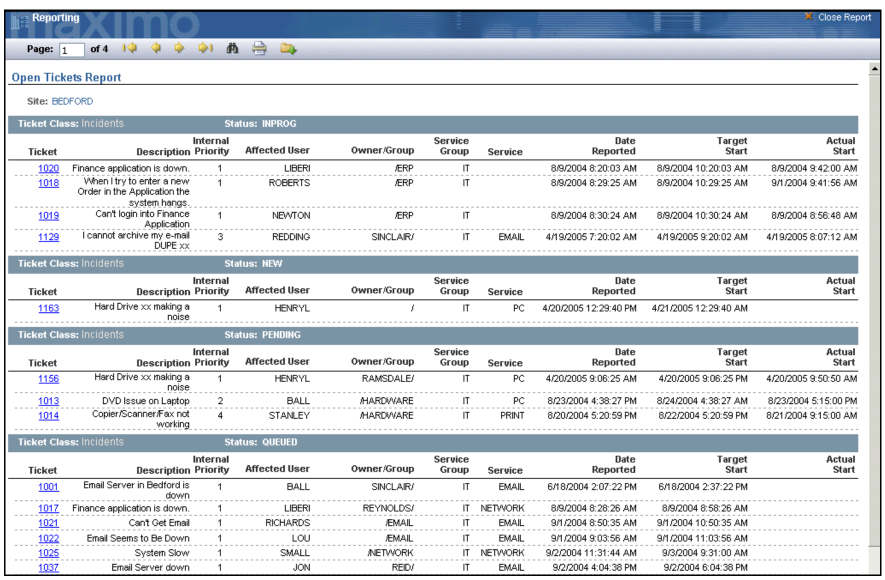
continued on next page

Service Support Reporting continued

Exercise: Running the Open Tickets Report

continued

Step	Action
7	Click **Submit**. Result: Several events occur: • The Request Page for the Open Tickets report closes. • The Business Analysis and Reporting dialog box becomes available. (It was on your screen, beneath the Request Page for the Open Tickets report.) • Maximo begins to run the Open Tickets report in a minimized Reporting browser window. • When the Open Tickets report is finished running, Maximo opens the minimized Reporting browser window.


Reporting   Close Report

Page: 1 of 4

Open Tickets Report

Site: BEDFORD

Ticket Class: Incidents   Status: INPROG

Ticket	Description	Internal Priority	Affected User	Owner/Group	Service Group	Service	Date Reported	Target Start	Actual Start
1020	Finance application is down.	1	LIBERI	/ERP	IT		8/9/2004 8:20:03 AM	8/9/2004 10:20:03 AM	8/9/2004 9:42:00 AM
1018	When I try to enter a new Order in the Application the system hangs.	1	ROBERTS	/ERP	IT		8/9/2004 8:29:25 AM	8/9/2004 10:29:25 AM	9/1/2004 9:41:56 AM
1019	Can't login into Finance Application	1	NEWTON	/ERP	IT		8/9/2004 8:30:24 AM	8/9/2004 10:30:24 AM	8/9/2004 8:56:48 AM
1129	I cannot archive my e-mail DUPE xx	3	REDDING	SINCLAIR/	IT	EMAIL	4/19/2005 7:20:02 AM	4/19/2005 9:20:02 AM	4/19/2005 8:07:12 AM

Ticket Class: Incidents   Status: NEW

Ticket	Description	Internal Priority	Affected User	Owner/Group	Service Group	Service	Date Reported	Target Start	Actual Start
1163	Hard Drive xx making a noise	1	HENRYL	/	IT	PC	4/20/2005 12:29:40 PM	4/21/2005 12:29:40 AM	

Ticket Class: Incidents   Status: PENDING

Ticket	Description	Internal Priority	Affected User	Owner/Group	Service Group	Service	Date Reported	Target Start	Actual Start
1156	Hard Drive xx making a noise	1	HENRYL	RAMSDALE/	IT	PC	4/20/2005 9:06:25 AM	4/20/2005 9:06:25 PM	4/20/2005 9:50:50 AM
1013	DVD Issue on Laptop	2	BALL	/HARDWARE	IT	PC	8/23/2004 4:38:27 PM	8/24/2004 4:38:27 AM	8/23/2004 5:15:00 PM
1014	Copier/Scanner/Fax not working	4	STANLEY	/HARDWARE	IT	PRINT	8/20/2004 5:20:59 PM	8/22/2004 5:20:59 PM	8/21/2004 9:15:00 AM

Ticket Class: Incidents   Status: QUEUED

Ticket	Description	Internal Priority	Affected User	Owner/Group	Service Group	Service	Date Reported	Target Start	Actual Start
1001	Email Server in Bedford is down	1	BALL	SINCLAIR/	IT	EMAIL	6/18/2004 2:07:22 PM	6/18/2004 2:37:22 PM	
1017	Finance application is down.	1	LIBERI	REYNOLDS/	IT	NETWORK	8/9/2004 8:28:26 AM	8/9/2004 8:58:26 AM	
1021	Can't Get Email	1	RICHARDS	/EMAIL	IT	EMAIL	9/1/2004 8:50:35 AM	9/1/2004 10:50:35 AM	
1022	Email Seems to Be Down	1	LOU	/EMAIL	IT	EMAIL	9/1/2004 9:03:56 AM	9/1/2004 11:03:56 AM	
1025	System Slow	1	SMALL	/NETWORK	IT	NETWORK	9/2/2004 11:31:44 AM	9/3/2004 9:31:00 AM	
1037	Email Server down	1	JON	REID/	IT	EMAIL	9/2/2004 4:04:38 PM	9/2/2004 6:04:38 PM	

continued on next page

Service Support Reporting continued

Exercise: Running the Open Tickets Report

continued

Step	Action
8	With your Open Tickets report displayed, answer the questions that follow this exercise.
9	When you are finished: • Close the Open Tickets report by clicking on the **Close Report** link in the upper right-hand corner of the Reporting browser window. • Close the **Business Analysis and Reporting** dialog box by clicking **Cancel**. • Return to the **Start Center**.

Open Tickets Report Questions

How is this report organized?

____

How does this report help you manage open tickets?

____

____

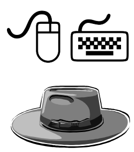
____

____

continued on next page

Service Support Reporting continued

Exercise: Opening the Ticket Query



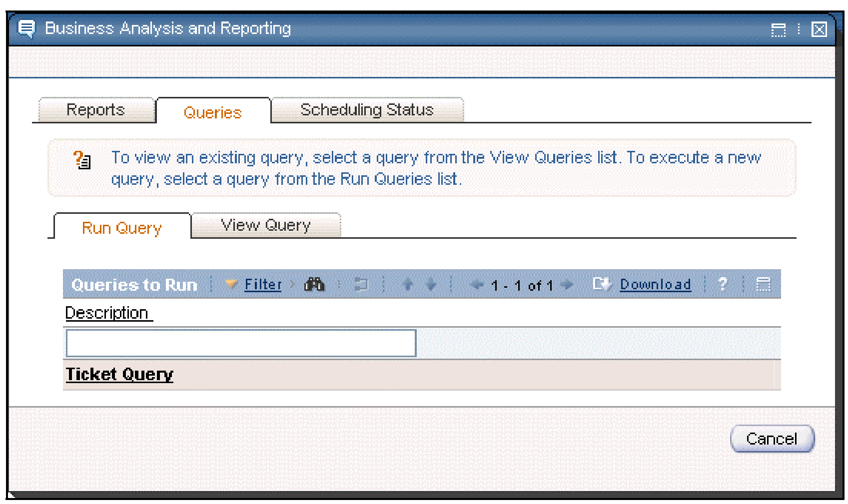
In this section, we are looking at one report and one query:

- Ticket Query
- Open Tickets report

Running a Maximo (Actuate) query includes at least three steps:

- Opening the query definition object
- Defining the query
- Running the query

Use the following steps to open the Ticket Query.

Step	Action
1	Sign in to Maximo as Mike Wilson.
2	From the Navigation Bar, click on the **Reports** link Reports. Result: Maximo displays the Reports menu.
3	Select **Service Desk > Incidents**. Result: The Business Analysis and Reporting dialog box opens.
4	Click the **Queries** tab. Result: Maximo displays the list of available queries. 

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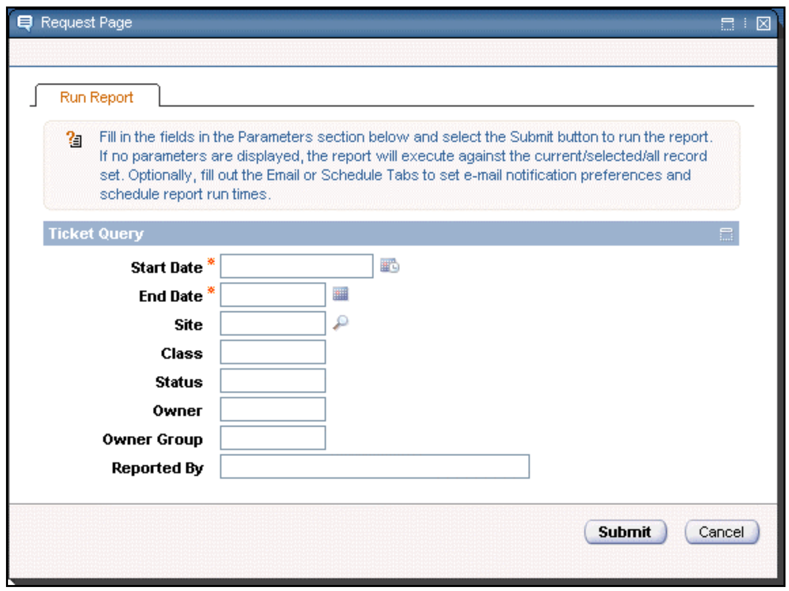
Service Support Reporting continued

Exercise: Opening the Ticket Query

continued

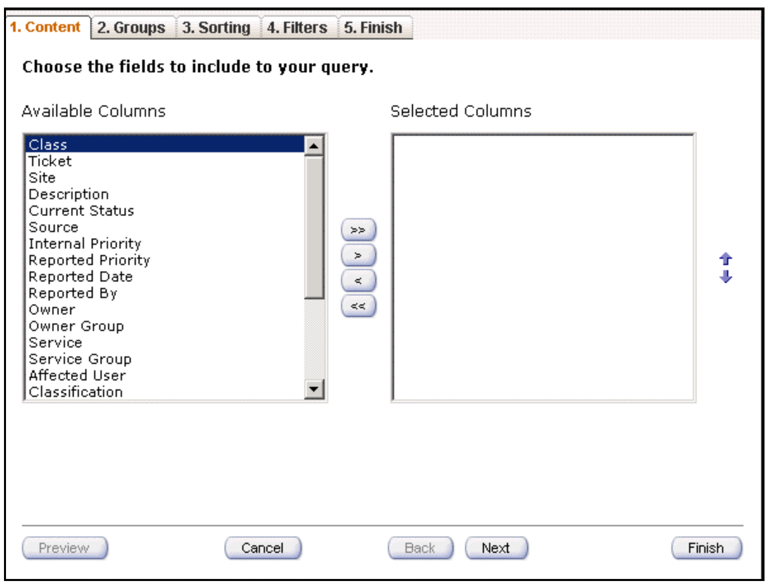
Step	Action
5	Click to select and run the **Ticket Query**. <u>Result</u>: The Request Page for the Ticket Query opens. 
6	Enter the following data: **<u>Field</u>** — **<u>Value</u>** **Start Date** — 1/1/04 (Use the **Select Date and Time** icon) **End Date** — [*Today*] (Use the **Select Date and Time** icon) **Site** — Bedford **Status** — Pending, Queued [*or your choice, or leave null*] **Owner** — [*Your choice or leave null*] **Owner Group** — [*Your choice or leave null*] **Reported By** — [*Your choice or leave null*]

continued on next page

Service Support Reporting continued

Exercise: Opening the Ticket Query

continued

Step	Action
7	Click **Submit**. Result: Several events occur: • The Request Page for the Ticket Query closes. • The Business Analysis and Reporting dialog box becomes available. (It was on your screen, beneath the Request Page for the Ticket Query.) • Maximo begins to prepare the Ticket Query in a minimized Reporting browser window. • When the Ticket Query is ready to be created, Maximo opens the minimized browser window to the **1. Content** tab for the query. 
8	Do *not* click any buttons at this time. We will start the next exercise from this point.

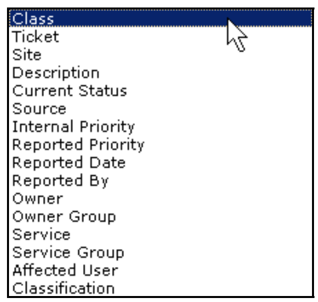
continued on next page

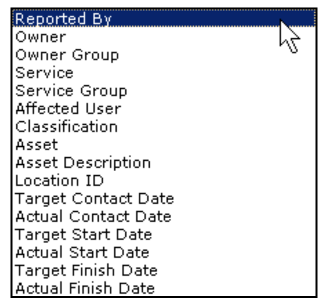
Service Support Reporting continued

Exercise: Creating a Ticket Query

As you can see, Maximo queries are different from reports. When you run any Maximo query, you actually open a dialog box to create a specific query. Moreover, you can create as many different queries as you need, using the available information.

Use the following steps to create a specific Ticket Query.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>


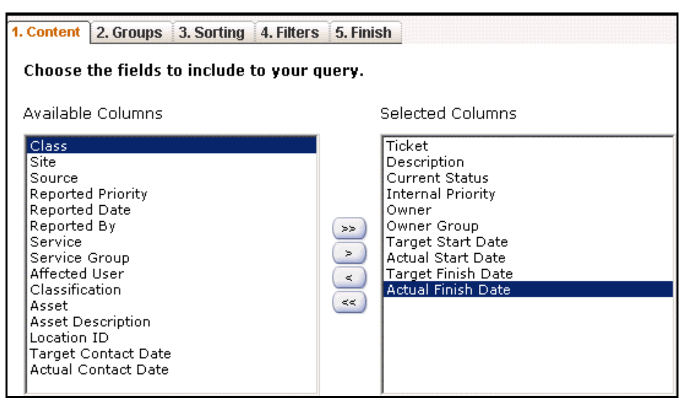


Continuing from the previous exercise, click to select the following **Available Columns**.

Hint: You can use the Shift and Ctrl keys for multiple selections.

Class, Ticket, Description, Current Status, Internal Priority, Owner, Owner Group, Target Start Date, Actual Start Date, Target Finish Date, Actual Finish Date.
</td></tr>
<tr><td>2</td><td>
Click the **Right Selection** button .

Result: Maximo displays your selected values in the Selected Columns window.



</td></tr>
</table>

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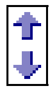
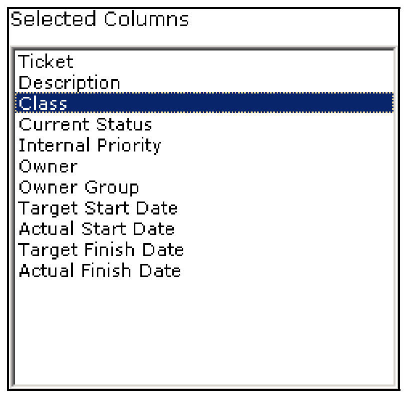
Service Support Reporting continued

Exercise: Creating a Ticket Query continued

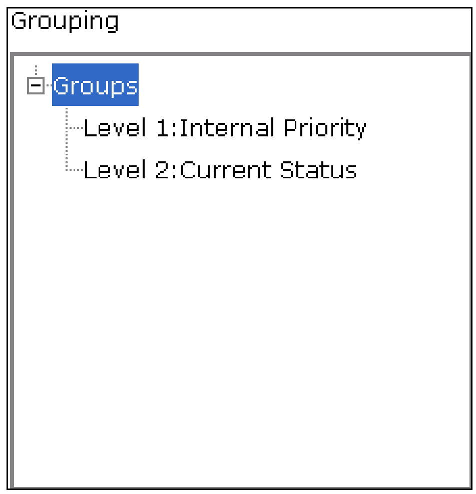
Step	Action
3	In the **Selected Columns** window, click to select **Class**, then use the down arrow  to move it down two places. Result: Your display should look similar to this one. 
4	Click **Next**. Result: The **2. Groups** tab opens.

continued on next page

Service Support Reporting continued

Exercise: Creating a Ticket Query

continued

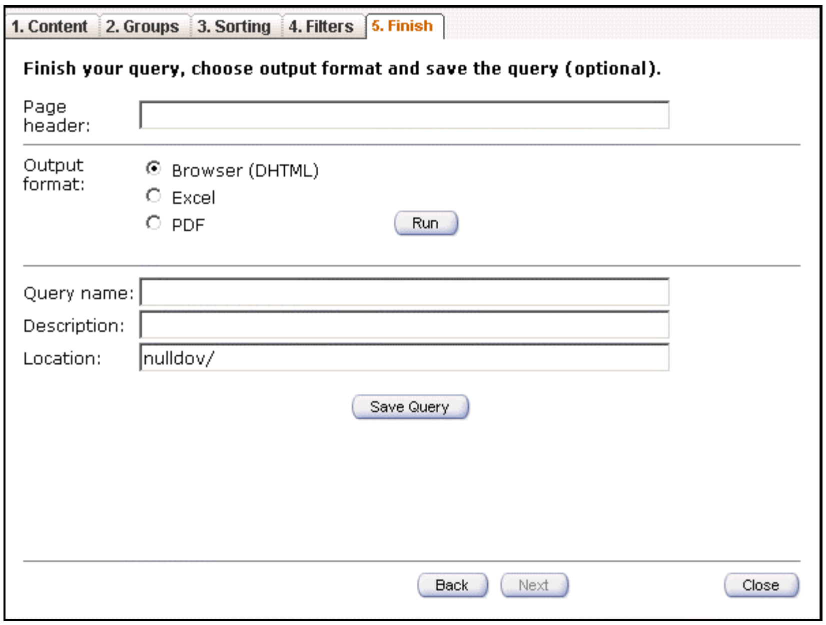
Step	Action
5	Click to select the following items in this order: 1. **Internal Priority**, and then the **Right Selection** button. 2. **Current Status**, and then the **Right Selection** button. Result: Your display should look similar to this one: 
6	Click **Next**. Result: The **3. Sorting** tab opens.
7	Click **Next**. Result: The **4. Filters** tab opens.

continued on next page

Service Support Reporting continued

Exercise: Creating a Ticket Query

continued

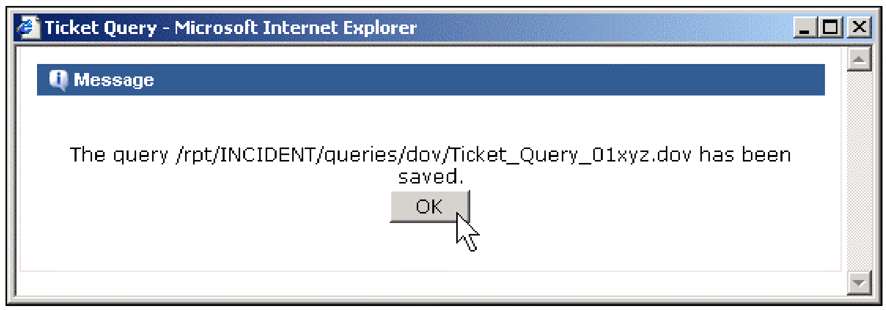
Step	Action
8	Click **Next**. Result: The **5. Finish** tab opens. 
9	Enter the following data: **Field** — **Value** **Page header** — [*Your name*] Ticket Query 01 **Output format** — [*Ensure that **Browser (DHTML)** is selected.*] **Query name** — Ticket_Query_01[*Your initials*] **Description** — [*Your choice*]

continued on next page

Service Support Reporting continued

Exercise: Creating a Ticket Query

continued

Step	Action
10	Click **Save Query**. Result: Your query is saved, and Maximo displays a Saved Query message. 
11	Click **OK**. Result: You have created and saved your new Ticket Query.
12	Do *not* click anything else at this time. We will start the next exercise from this point.

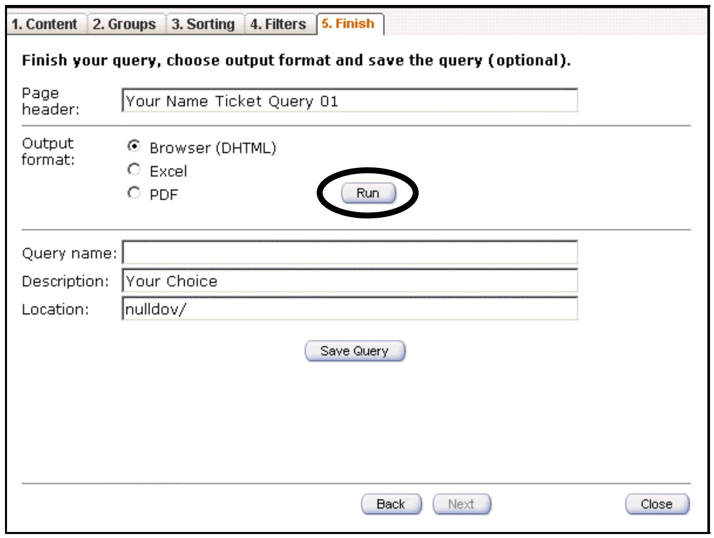
continued on next page

Service Support Reporting continued

Exercise: Running Your Ticket Query

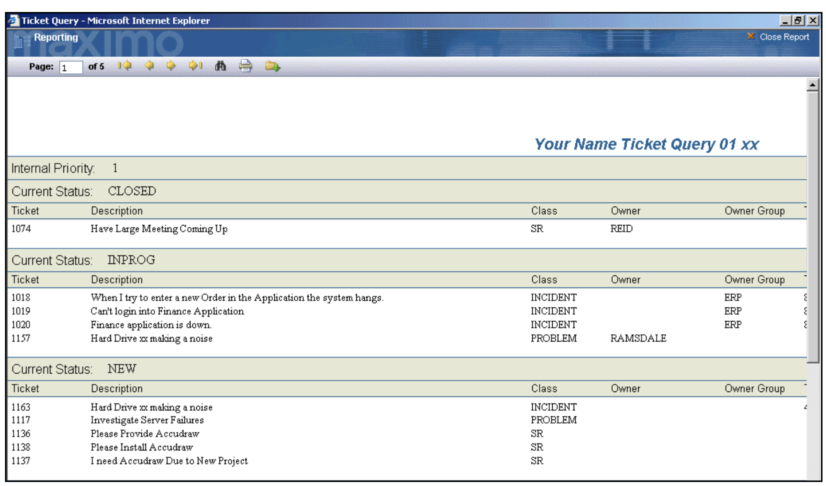
Use the following steps to run your newly created Ticket Query.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>



Continuing from the previous exercise, click **Run**.

<u>Result</u>: Your query runs and Maximo displays the results.



</td></tr>
</table>

continued on next page

Service Support Reporting continued

Exercise: Running Your Ticket Query

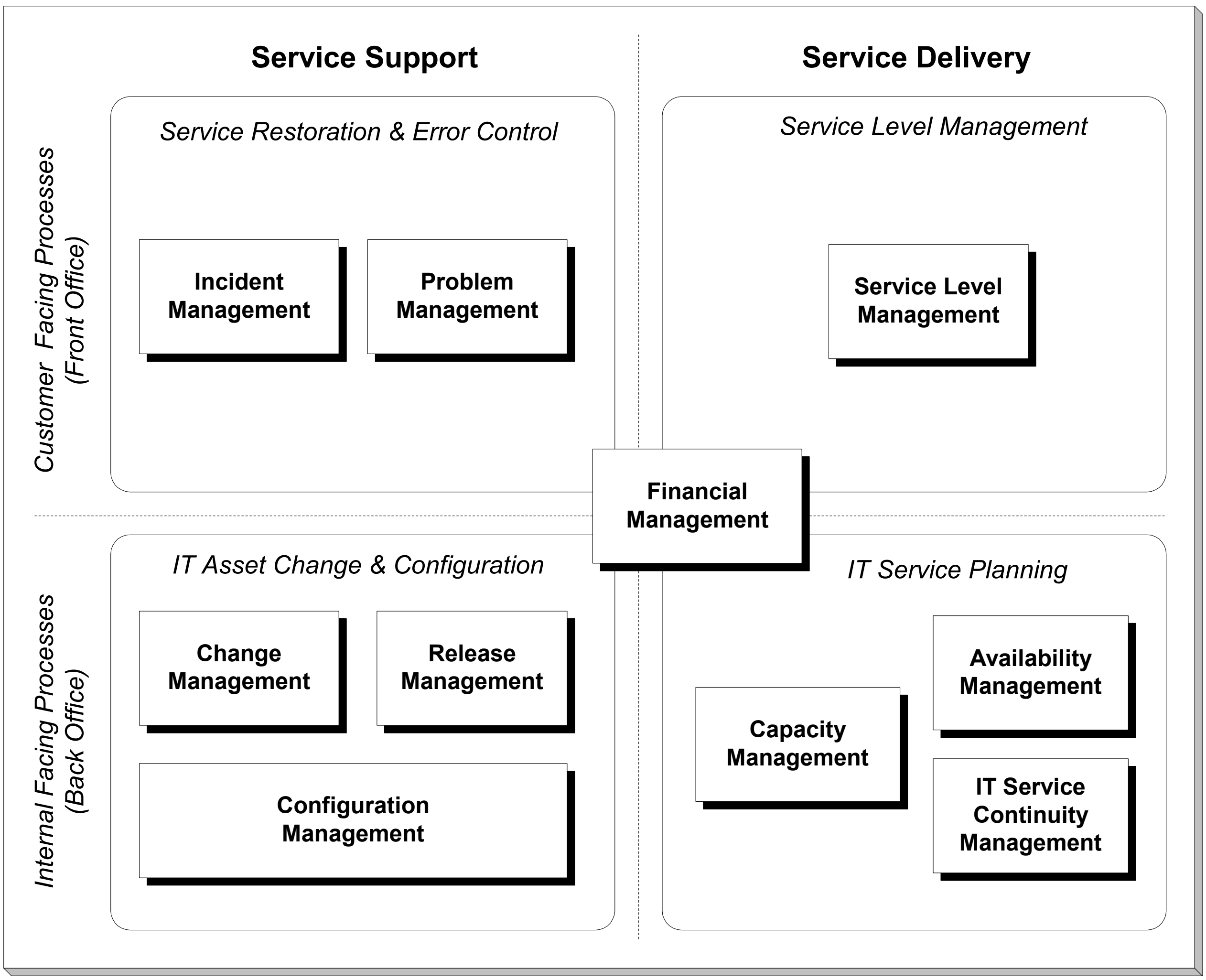
continued

Step	Action
2	When you are finished viewing the results of your query: • Close the Ticket Query by clicking on the **Close Report** link in the upper right-hand corner of the **Reporting** browser window. • Click **Close** on the **Query Creation** page. • Close the **Business Analysis and Reporting** dialog box by clicking **Cancel**. • Return to the Maximo **Start Center**.

Overview: Service Level Agreements (SLAs) in Maximo

Introduction

Recall from Chapter 2 that Service Delivery is the other core area within ITIL. Maximo uses SLAs to support Service Level Management.



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Overview: Service Level Agreements (SLAs) in Maximo continued

SLAs Revisited

Recall from Chapter 3 that you use the Service Level Agreements application in Maximo to create and manage service level agreements (SLAs). An *SLA* is a written agreement between a service provider and customer that documents the agreed-upon levels of service.

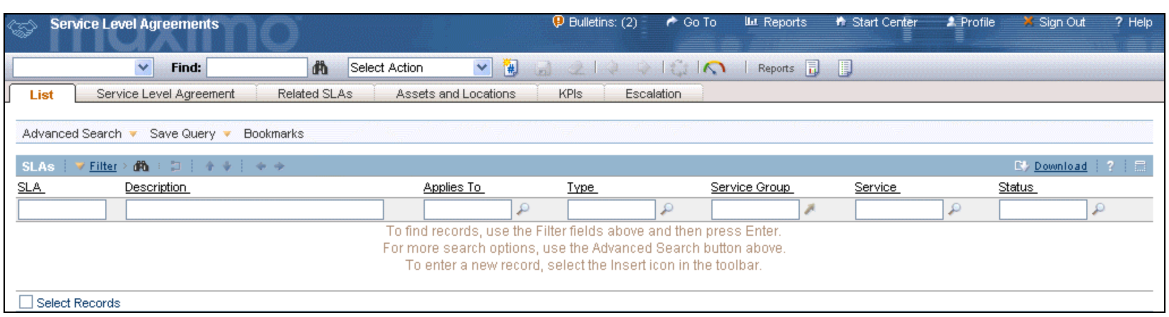
Service Level Agreements Application

You use the Service Level Agreements application and the Escalation functionality to manage and meet the commitments in an SLA. A *commitment* is a specific responsibility that the service provider must meet to fulfill the SLA with the customer. An *escalation* is a Maximo function that automatically monitors critical processes. An SLA can have one or more commitments, each having its own escalation points.

Service Level Agreements Application Tabs

The Service Level Agreements application contains the following tabs:

- **List** to search Maximo for SLA records.
- **Service Level Agreement** to add, view, modify, or delete service level agreements.
- **Related SLAs** to associate or view related service level agreements.
- **Assets and Locations** to associate or view assets and locations for a service level agreement.
- **KPIs** to add, view, modify, or delete key performance indicators for a service level agreement.
- **Escalation** to add, view, or modify the escalation for a service level agreement.



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Creating SLAs

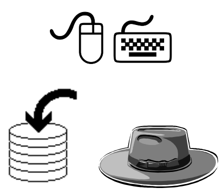
Introduction

In this section you will create an SLA, and then apply your SLA to an incident.

Scenario

Scenario: You have an agreement with a customer with two commitments and an escalation point for each. The first commitment is to respond to all incidents related to company-issued cell phones within 2 hours. The escalation point for the response commitment is to notify the incident owner if no response has been given after 1-1/2 hours. The second commitment is to resolve all incidents related to company-issued cell phones within 4 hours. The escalation point for the resolution commitment checks the status of the incident at the 3-hour point. If the incident is still open, Maximo reassigns ownership of the incident to the tier 2 group. The tier 2 group can take the appropriate actions in order to meet the SLA commitments.

Exercise: Create an SLA



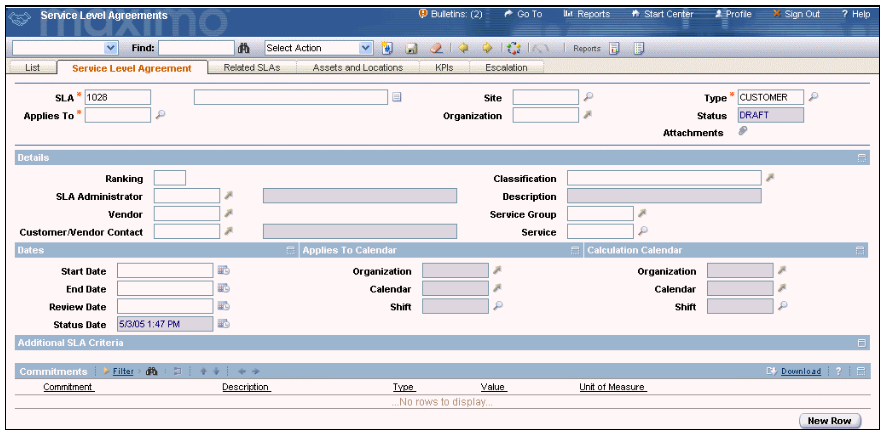
Use the following steps to create an SLA.

Step	Action
1	Sign in to Maximo as Mike Wilson.
2	Open the **Service Level Agreements** application. **Service Management > Service Level Agreements**

continued on next page

Creating SLAs continued

Exercise: Create an SLA continued

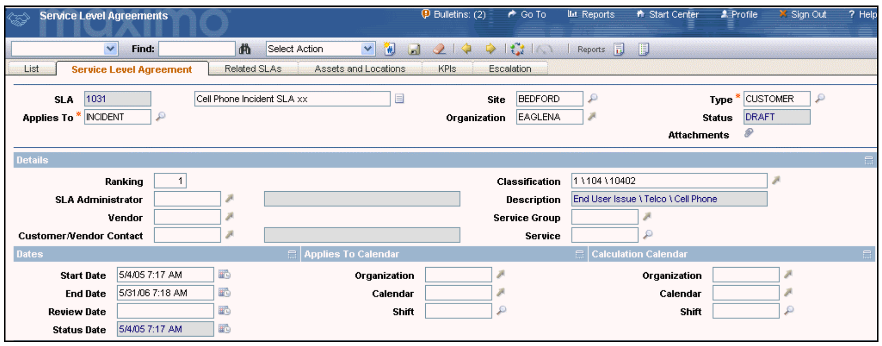
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Insert a new SLA.
<u>Result</u>: The Service Level Agreement tab opens.


Write the SLA # here: ____________________.</td></tr>
<tr><td>4</td><td>Enter the following data:
<u>Field</u> — <u>Value</u>
Description — Cell Phone Incident SLA xx
Applies To (Object) — INCIDENT
Site — BEDFORD
Ranking — 1
Start Date — [Today] (Use Select Date.)
End Date — [Last day of the month, one year from today.]
Classification — End User Issue \ Telco \ Cell Phone</td></tr>
</table>

continued on next page

Creating SLAs continued

Exercise: Create an SLA continued

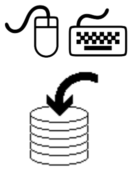
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Save the record.
Result: Your SLA should look similar to this one.


</td></tr>
<tr><td>6</td><td>Do not close the SLA application. We will start the next exercise from this point.</td></tr>
</table>

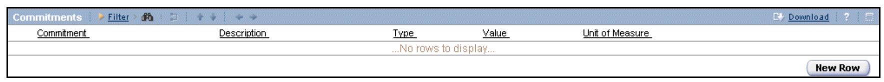
continued on next page

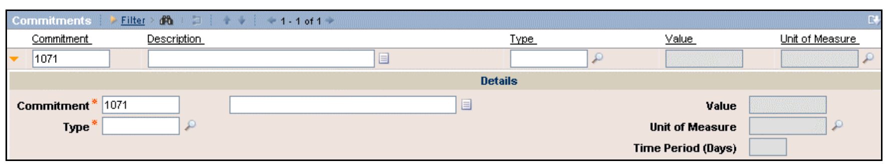
Creating SLAs continued

Exercise: Adding Commitments



Use the following steps to add two commitments to your SLA.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

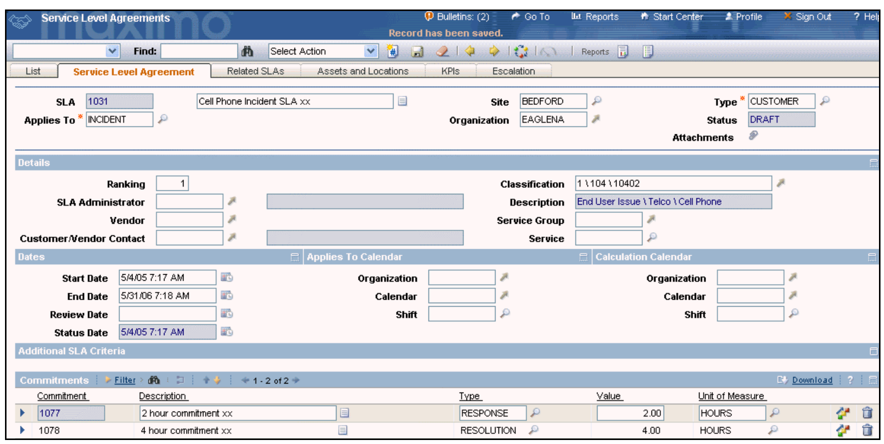
Continuing from the previous exercise, click the New Row button in the Commitments section.
<u>Result</u>: A new row opens, ready for editing.

</td></tr>
<tr><td>2</td><td>Enter the following data:
<u>Field</u> — <u>Value</u>
Description — 2-hour commitment xx
Type — RESPONSE
Value — 2
Unit of Measure — HOURS</td></tr>
<tr><td>3</td><td>Save the record.</td></tr>
</table>

continued on next page

Creating SLAs continued

Exercise: Adding Commitments

continued

Step	Action
4	Again, click the **New Row** button in the **Commitments** section, then enter the following data: **<u>Field</u>** — **<u>Value</u>** **Description** — 4-hour commitment *xx* **Type** — RESOLUTION **Value** — 4 **Unit of Measure** — HOURS
5	**Save** the record. <u>Result</u>: Your SLA should look similar to this one. 
6	Do *not* close the SLA application. We will start the next exercise from this point.

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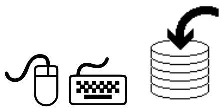
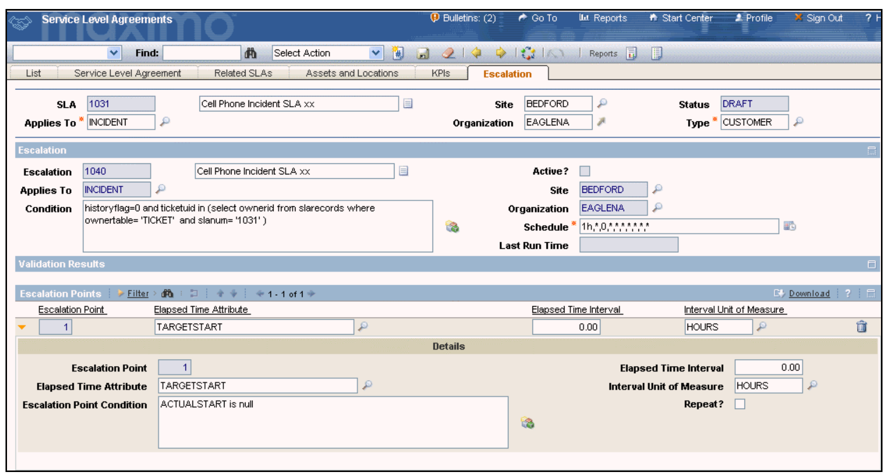
Creating SLAs continued

Exercise: Creating the First Notification



Use the following steps to create a notification for the first commitment.

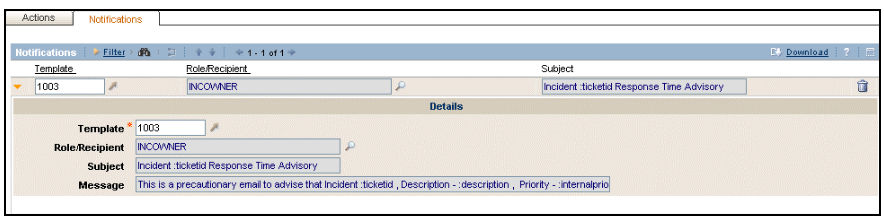
Step	Action
1	Continuing from the previous exercise, ensure that the first commitment is selected.
2	Click the **Define Escalations** icon . Result: The Escalation tab opens for the selected commitment, displaying a pre-populated escalation point. 
3	In the **Escalation Points** section, enter –1.5 into the **Elapsed Time Interval** field.
4	Select the **Notifications** subtab below the **Escalation Points** section, then click **New Row**. Result: A new row opens for editing.

continued on next page

Creating SLAs continued

Exercise: Creating the First Notification

continued

Step	Action
5	Click the **Detail Menu** button for the **Template** field, and choose **Select Value**. Result: The Select Value dialog box opens.
6	Click to select **1003 Incident Response Time Expiration Advisory**. Result: The Select Value dialog box closes and populates the appropriate fields with the selected template information. 
7	**Save** the record.
8	Do *not* close the application. We will continue the next exercise from this point.

continued on next page

Creating SLAs continued

Exercise: Creating the Second Notification

Use the following steps to create a notification for the second commitment.

Step	Action
1	Continuing from the previous exercise, select the **Service Level Agreement** tab and ensure that the second commitment is now selected.
2	Click the **Define Escalations** icon . <u>Result</u>: The Escalation tab opens for the selected commitment, displaying a pre-populated escalation point.
3	In the **Escalation Points** section, enter –3.0 into the **Elapsed Time Interval** field.
4	Select the **Notifications** subtab below the **Escalation Points** section, and then click **New Row**. <u>Result</u>: A new row opens for editing.

continued on next page

Creating SLAs continued

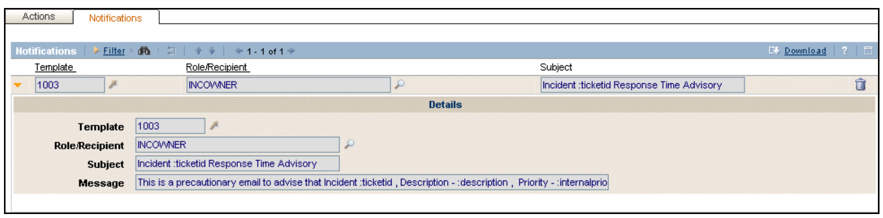
Exercise: Creating the Second Notification

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Click the Detail Menu button for the Template field, and choose Select Value.

<u>Result</u>: The Select Value dialog box opens.</td></tr>
<tr><td>6</td><td>Click to select 1003 Incident Resolution Time Expiration Advisory.

<u>Result</u>: The Select Value dialog box closes and populates the appropriate fields with the selected template information.



</td></tr>
<tr><td>7</td><td>Save the record.</td></tr>
<tr><td>8</td><td>Do not close the application. We will continue the next exercise from this point.</td></tr>
</table>

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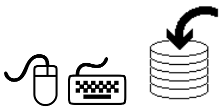
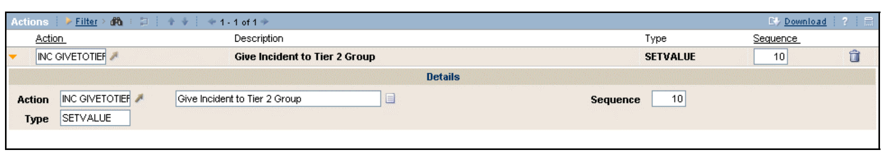
Creating SLAs continued

Exercise: Creating an Action



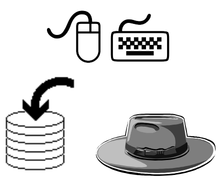
Use the following steps to create an action for the second escalation point (which is for the second commitment).

Step	Action
1	Continuing from the previous exercise, ensure that the second escalation point is selected on the **Escalation** tab.
2	Select the **Actions** subtab, and then click **New Row**. Result: A new row opens for editing.
3	Click the **Detail Menu** button for the **Action** field, and choose **Select Value**. Result: The Select Value dialog box opens.
4	Click to select **INC GIVETOTIER2 Give Incident to Tier 2 Group**. Result: The Select Value dialog box closes and populates the appropriate fields with the selected action information. 
5	**Save** the record, then change the status to **ACTIVE**.
6	Return to the **Start Center**.

continued on next page

Creating SLAs continued

Exercise: Checking Your Work



Use the following steps to check your work.

<u>Scenario</u>: You have an agreement with a customer with two commitments and an escalation point for each. The first commitment is to respond to all incidents related to company-issued cell phones within 2 hours. The escalation point for the response commitment is to notify the incident owner if no response has been given after 1-1/2 hours.

In this exercise, you will create an SR, create the incident, and apply your newly created SLA. For the purpose of this exercise, we will simulate the taking of a telephone call from a user. Use the following steps.

Step	Action
1	Sign in to Maximo as Bill Sinclair and open the **Service Requests** application.
2	Open a new SR and enter the following information: **<u>Field</u>** — **<u>Value</u>** **Reported By** — WINSTON **Summary** — Cell phone is malfunctioning *xx* **Details** — [*Your choice*] **Classification** — 1 / 104 / 10402 **Description** — End User Issue \ Telco \ Cell Phone **Internal Priority** — 3 **Site** — BEDFORD
3	**Save** the record, then create an incident. Write the incident # here: ____________________. <u>Note</u>: Normally, we would have routed this SR into Workflow; however, Workflow would have automatically applied the SLA and we want to see our SLA applied. Therefore, for the purpose of this exercise, we will not be routing this ticket through Workflow.
4	Open the **Incidents** application, then find and select the incident. <u>Hint</u>: You can use the Related Records tab.

continued on next page

Creating SLAs continued

Exercise: Checking Your Work

continued

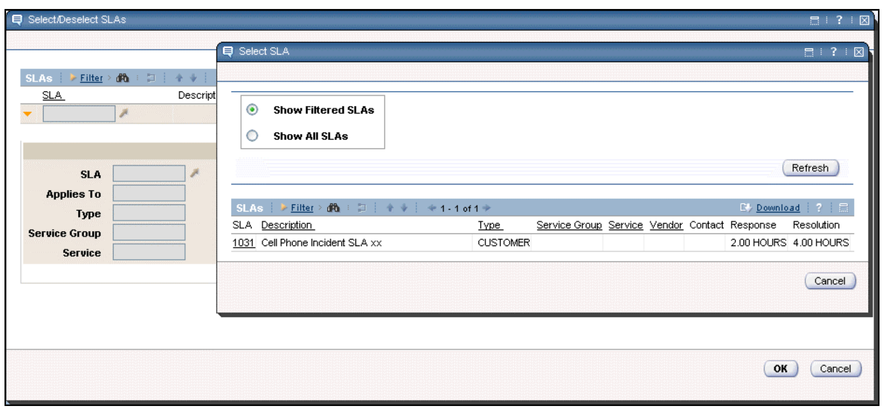
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Take ownership of the incident (as Bill Sinclair).</td></tr>
<tr><td>6</td><td>From the Select Action menu, choose Select/Deselect SLAs.

<u>Note</u>: Normally, if you were not using Workflow, you would simply choose Apply SLA. However, in that case, Maximo would find and select the best SLA for this ticket. For the purpose of this exercise, we want to see that Maximo would choose our SLA for this ticket.

<u>Result</u>: A Select/Deselect SLAs dialog box opens.</td></tr>
<tr><td>7</td><td>Click New Row.

<u>Result</u>: A new row opens for editing.</td></tr>
<tr><td>8</td><td>For the SLA field, click the Detail Menu button, then choose Select Value.

<u>Result</u>: A Select SLA dialog box opens.



</td></tr>
<tr><td>9</td><td>For training purposes, we are not going to select the SLA at this time.

Click Cancel.

<u>Result</u>: The Select SLA dialog box closes.</td></tr>
</table>

continued on next page

Creating SLAs continued

Exercise: Checking Your Work

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>Close the Select/Deselect SLAs dialog box by clicking Cancel.</td></tr>
<tr><td>11</td><td>Because we have seen that our newly created SLA is the only one that applies to this incident, we know that we can safely choose Apply SLA from the Select Action menu.

For the purpose of this training exercise, we will do this now.

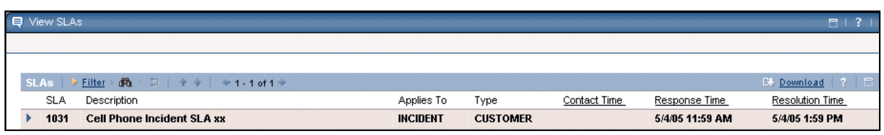
Choose Apply SLA from the Select Action menu.

<u>Result</u>: Maximo briefly displays a message:

<code>SLA [Your SLA #] has been applied.</code></td></tr>
<tr><td>12</td><td>Now that the SLA has been applied, we can view it and see the target values.

From the Select Action menu, choose View SLAs.

<u>Result</u>: A View SLAs dialog box opens.



<u>Note</u>: In a hosted environment, there will be an SLA listed from each participant.</td></tr>
</table>

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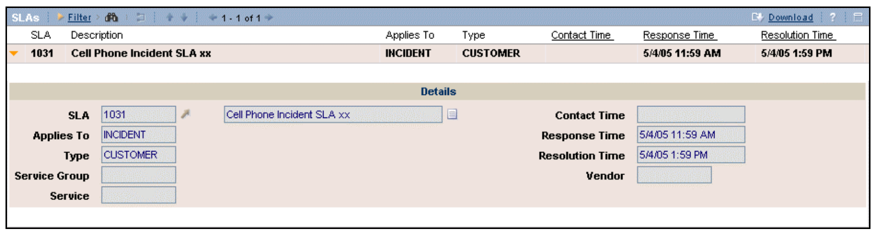
Creating SLAs continued

Exercise: Checking Your Work

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>13</td><td>Click the View Details button for the applied SLA.
<u>Result</u>: Maximo displays the details of the SLA.

</td></tr>
<tr><td>14</td><td>When you are finished viewing the details of the SLA, click OK.
<u>Result</u>: The View SLAs dialog box closes, and you should be on the incident.</td></tr>
<tr><td>15</td><td>Return to the Start Center.
If you used the Related Records tab of the SR to go to the incident, then click the Return link (upper right-hand corner).
<u>Result</u>: You are returned to the SR.</td></tr>
</table>

[Optional] Exercise: Verifying the First Escalation Point

If class time and structure permit, then after 1-1/2 hours have passed, sign back in to Maximo as Bill Sinclair.

1. How would you verify that the SLA activated the first escalation point?

2. Verify that the SLA activated the first escalation point.

Service Level Management Reports

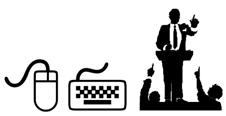
Introduction

Maximo has several reports to support Service Level Management:

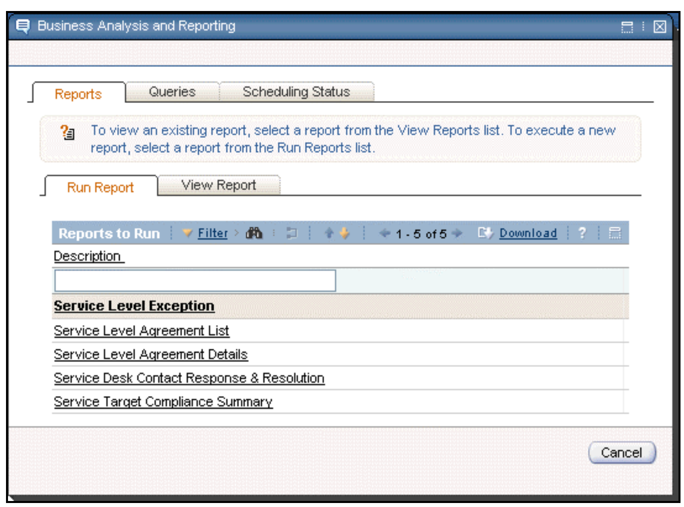
- Service Desk Contact Response and Resolution
- Service Target Compliance Summary
- Service Desk Case Volume Summary

In the next exercises, we will run and discuss each of these three reports.

Exercise: Running the Service Desk Contact Response and Resolution Report



Use the following steps to run the Service Desk Contact Response and Resolution report.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Sign in to Maximo as Mike Wilson.</td></tr>
<tr><td>2</td><td>From the Navigation Bar, click the Reports link 
 and choose Service Management > Service Level Agreements.
<u>Result</u>: The Business Analysis and Reporting dialog box opens.

</td></tr>
</table>

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Service Level Management Reports continued

Exercise: Running the Service Desk Contact Response and Resolution Report

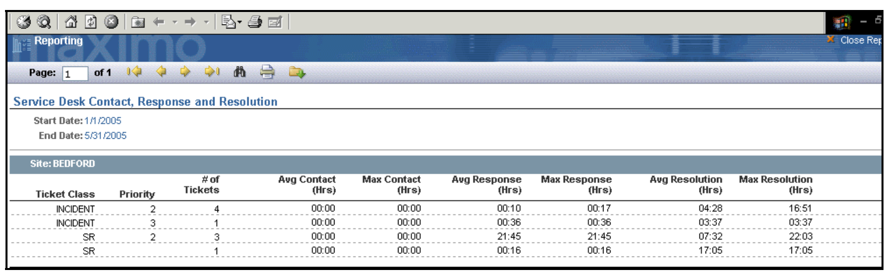
continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Click to select the Service Desk Contact Response and Resolution report.

<u>Result</u>: The Request Page opens for this report.</td></tr>
<tr><td>4</td><td>Enter the following data, then click Submit.

<u>Field</u>   <u>Value</u>
Site   BEDFORD
Start Date   [The first day of last month] (Use Date Select.)
End Date   [Today’s date] (Use Date Select.)

<u>Result</u>: Maximo runs and displays the report.



<table>
<tr><th>Ticket Class</th><th>Priority</th><th># of Tickets</th><th>Avg Contact (Hrs)</th><th>Max Contact (Hrs)</th><th>Avg Response (Hrs)</th><th>Max Response (Hrs)</th><th>Avg Resolution (Hrs)</th><th>Max Resolution (Hrs)</th></tr>
<tr><td>INCIDENT</td><td>2</td><td>4</td><td>00:00</td><td>00:00</td><td>00:10</td><td>00:17</td><td>04:28</td><td>16:51</td></tr>
<tr><td>INCIDENT</td><td>3</td><td>1</td><td>00:00</td><td>00:00</td><td>00:36</td><td>00:36</td><td>03:37</td><td>03:37</td></tr>
<tr><td>SR</td><td>2</td><td>3</td><td>00:00</td><td>00:00</td><td>21:45</td><td>21:45</td><td>07:32</td><td>22:03</td></tr>
<tr><td>SR</td><td></td><td>1</td><td>00:00</td><td>00:00</td><td>00:16</td><td>00:16</td><td>17:05</td><td>17:05</td></tr>
</table></td></tr>
<tr><td>5</td><td>Review the context of this report and discuss it in class.</td></tr>
<tr><td>6</td><td>When you are finished:
• Close the report.
• Close the Business Analysis and Reporting dialog box.
• Return to the Start Center.</td></tr>
</table>

Discussion

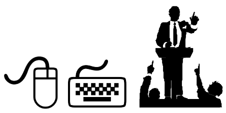
What kind of information does this report contain?

How does this report help you manage your Service Desk/Service Level Agreements?

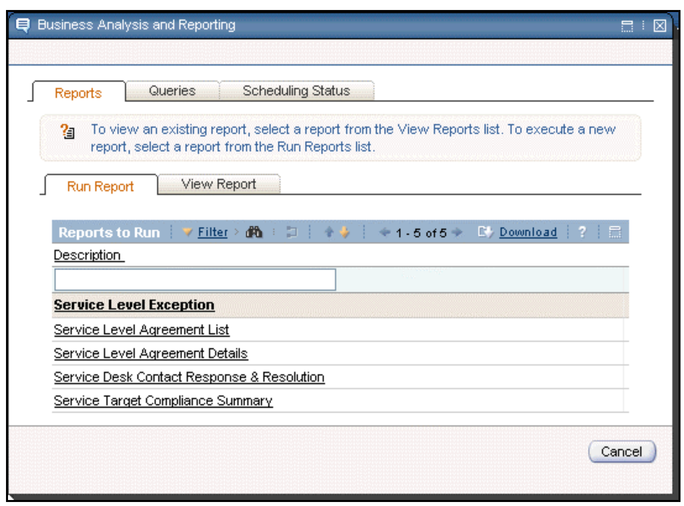
continued on next page

Service Level Management Reports continued

Exercise: Running the Service Target Compliance Summary Report



Use the following steps to run the Service Target Compliance Summary report.

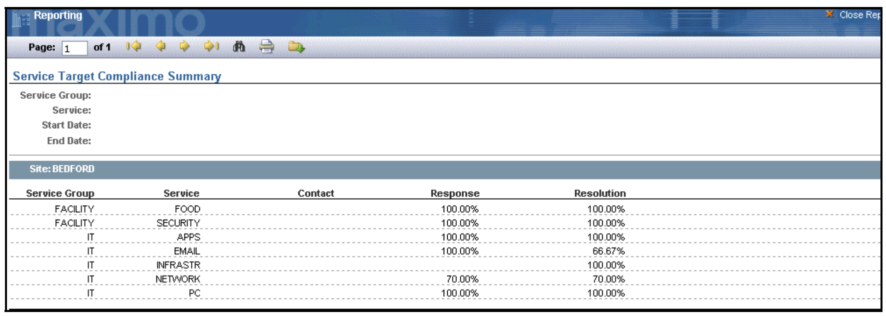
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Sign in to Maximo as Mike Wilson.</td></tr>
<tr><td>2</td><td>From the Navigation Bar, click the Reports link  and choose Service Management > Service Level Agreements.
Note: You could also go to Service Desk > Service Requests.
Result: The Business Analysis and Reporting dialog box opens.

</td></tr>
<tr><td>3</td><td>Click to select the Service Target Compliance Summary report.
Result: The Request Page opens for this report.</td></tr>
</table>

continued on next page

Service Level Management Reports continued

Exercise: Running the Service Target Compliance Summary Report

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Enter the following data, then click Submit.
<u>Field</u> <u>Value</u>
Site BEDFORD
<u>Result</u>: Maximo runs and displays the report.


Service Target Compliance Summary
Service Group:
Service:
Start Date:
End Date:
Site: BEDFORD
<table>
<tr><th>Service Group</th><th>Service</th><th>Contact</th><th>Response</th><th>Resolution</th></tr>
<tr><td>FACILITY</td><td>FOOD</td><td></td><td>100.00%</td><td>100.00%</td></tr>
<tr><td>FACILITY</td><td>SECURITY</td><td></td><td>100.00%</td><td>100.00%</td></tr>
<tr><td>IT</td><td>APPS</td><td></td><td>100.00%</td><td>100.00%</td></tr>
<tr><td>IT</td><td>EMAIL</td><td></td><td>100.00%</td><td>66.67%</td></tr>
<tr><td>IT</td><td>INFRASTR</td><td></td><td></td><td>100.00%</td></tr>
<tr><td>IT</td><td>NETWORK</td><td></td><td>70.00%</td><td>70.00%</td></tr>
<tr><td>IT</td><td>PC</td><td></td><td>100.00%</td><td>100.00%</td></tr>
</table>
</td></tr>
<tr><td>5</td><td>Review the context of this report and discuss it in class.</td></tr>
<tr><td>6</td><td>When you are finished:
• Close the report.
• Close the Business Analysis and Reporting dialog box.
• Return to the Start Center.</td></tr>
</table>

Discussion

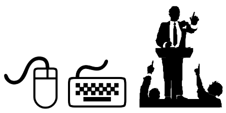
What kind of information does this report contain?

How does this report help you manage your Service Desk/Service Level Agreements?

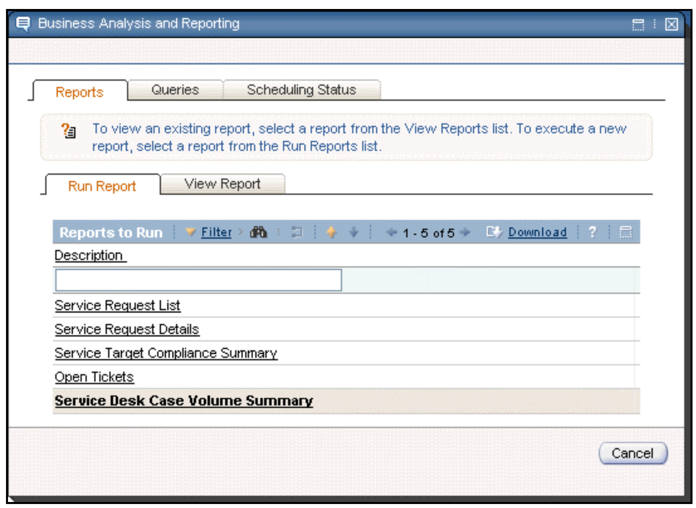
continued on next page

Service Level Management Reports continued

Exercise: Running the Service Desk Case Volume Summary Report



Use the following steps to run the Service Desk Case Volume Summary report.

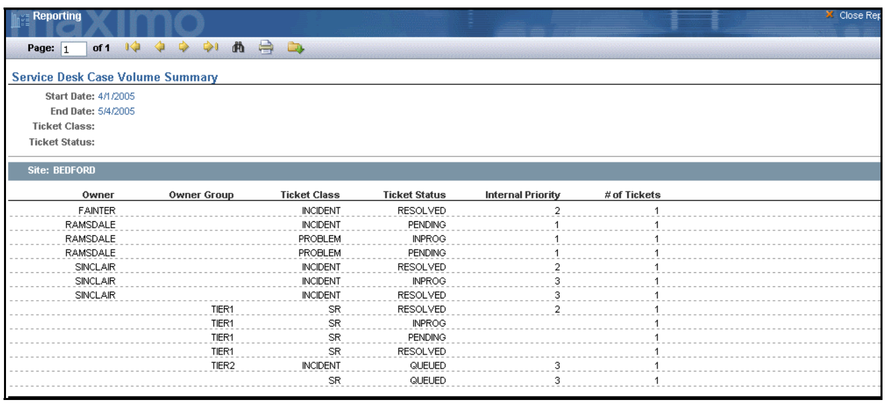
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Sign in to Maximo as Mike Wilson.</td></tr>
<tr><td>2</td><td>From the Navigation Bar, click the Reports link  and choose Service Desk > Service Requests.
<u>Result</u>: The Business Analysis and Reporting dialog box opens.
</td></tr>
<tr><td>3</td><td>Click to select the Service Desk Case Volume Summary report.
<u>Result</u>: The Request Page opens for this report.</td></tr>
</table>

continued on next page

Service Level Management Reports continued

Exercise: Running the Service Desk Case Volume Summary Report

continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>
Enter the following data, then click Submit.
<u>Field</u> — <u>Value</u>
Site — BEDFORD
Start Date — [The first day of last month] (Use Date Select.)
End Date — [Today’s date] (Use Date Select.)
<u>Result</u>: Maximo runs and displays the report.

</td></tr>
<tr><td>5</td><td>Review the context of this report and discuss it in class.</td></tr>
<tr><td>6</td><td>When you are finished:
• Close the report.
• Close the Business Analysis and Reporting dialog box.
• Return to the Start Center.</td></tr>
</table>

Reporting

Page: 1 of 1

Service Desk Case Volume Summary

Start Date: 4/1/2005
End Date: 5/4/2005
Ticket Class:
Ticket Status:

Site: BEDFORD

Owner	Owner Group	Ticket Class	Ticket Status	Internal Priority	# of Tickets
FAINTER		INCIDENT	RESOLVED	2	1
RAMSDALE		INCIDENT	PENDING	1	1
RAMSDALE		PROBLEM	INPROG	1	1
RAMSDALE		PROBLEM	PENDING	1	1
SINCLAIR		INCIDENT	RESOLVED	2	1
SINCLAIR		INCIDENT	INPROG	3	1
SINCLAIR		INCIDENT	RESOLVED	3	1
	TIER1	SR	RESOLVED	2	1
	TIER1	SR	INPROG		1
	TIER1	SR	PENDING		1
	TIER1	SR	RESOLVED		1
	TIER2	INCIDENT	QUEUED	3	1
		SR	QUEUED	3	1

Discussion

What kind of information does this report contain?

How does this report help you manage your Service Desk/Service Level Agreements?

Chapter Summary

Service Support Reporting

Service Support is one of the two core areas within ITIL. It encompasses Service Desk, Incident Management, Problem Management, Change Management, Release Management, and Configuration Management.

Reporting is a valuable tool for use in managing the Service Desk function and the Service Support processes.

Overview: Service Level Agreements (SLAs) in Maximo

You use the Service Level Agreements application in Maximo to create and manage service level agreements (SLAs). An *SLA* is a written agreement between a service provider and customer that documents the agreed-upon levels of service.

Service Level Management Reports

Maximo has several reports to support Service Level Management:

- Service Desk Contact Response and Resolution
- Service Target Compliance Summary
- Service Desk Case Volume Summary

NOTES:

NOTES:

Educational Services
Student Feedback Form

Name: ____________________________ **Instructor:** ______________________________
Class: ____________________________ **Date:** ______________________________

	Excel-lent	Very Good	Good	Fair	Poor	Very Poor
1. The course structure and style was:						
2. The course content was:						
3. The workshops as a whole were:						
4. The length of the course was :						
5. Course organization was:						
6. Relevance and usefulness of course content was:						
7. Opportunity for practicing what was learned was:						
8. Amount you learned in the class was:						
9. The instructor's effectiveness in teaching the subject matter was:						
10. Use of class time was:						
11. Instructor's use of examples and illustrations was:						
12. Instructor's ability to answer student questions was:						
13. Instructor's ability to present alternative explanations when needed was:						
14. Tailoring of instruction to varying student skill levels was:						
15. Instructor demonstrations were:						
16. Instructor's ability to solve unexpected problems was:						

17. Which aspects of this course were most effective? ____

18. Which aspects of this course detracted from your learning? ________________________________

19. What suggestions do you have for improving this course? ___________________________________

MRO Software Ed. Services
Fax: (781) 280-2201

Thank You!

100 Crosby Drive
Bedford, MA 01730