SysAid™

ITIL Package Guide

Change Management, Problem Management and CMDB

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Introduction

What is ITIL, and how can it help me?

The Information Technology Infrastructure Library (ITIL), is an international framework of best practices for IT management and service quality, released by the UK Office of Government Commerce (formerly CCTA).

ITIL's That Simple

SysAid was established in 2003 on core ITIL principles which have since provided the foundation for all future SysAid Research and Development designs. Over the years, we have continued to develop in accordance with ITIL methodology, and remain dedicated to bringing ITIL best practices to your IT environment.

While ITIL can be complex to interpret and implement, **our trademark SysAid simplicity and ease-of-use has been built into all SysAid ITIL modules**. This means that you will continue to experience the same fully customizable and intuitive SysAid interface, and smooth integration with your existing SysAid modules. All ITIL modules come with pre-defined templates or basic start-up tools to help you get you up and running, so you can enjoy ITIL's wide-reaching and comprehensive range of proven management solutions in next to no time.

In fact, by deploying the SysAid Helpdesk, you've already started using ITIL. The SysAid Helpdesk is based on key ITIL Incident Management concepts, which we expanded via the SysAid CMDB Module as a practical extension of ITIL Configuration Management. In this latest SysAid Release 6.0 however, we have succeeded in capturing both ITIL Change Management and Problem Management best practice processes within a fully-integrated and intuitive SysAid ITIL Package.

ITIL Problem Management

In ITIL, Problem Management refers to the process of analyzing root incident causes and proactively handling problem areas to minimize incident recurrence and business impact (as opposed to fire-fighting).

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In a logical extension of the SysAid Helpdesk, SysAid's ITIL Problem Management offers a wider approach to managing SR Incidents, including the ability to group isolated SRs into related problem themes, and a knowledgebase of known errors and work-around methods. The module is designed to help you improve your IT service levels and proactively eradicate root problem causes in your organization.

ITIL Change Management

ITIL literature also provides a best practice process framework and approval workflow for implementing effective organizational change and minimizing the risk of business exposure and service disruption.

SysAid's ITIL Change Management holds an unlimited number of change processes and allows you to customize options to suit any change scenario in your organization. Automate workflow approval processes with ITIL's proven chain of approval to help you manage and control your change activities. Apply pre-defined change templates, perform multi-level risk assessments and authorizations with a full audit trail, set secure notes, tasks and permissions for multiple stakeholders and more.

ITIL In Action

You might be applying an upgrade to the internet firewall in your organization for example. SysAid's ITIL Change Management Module offers a best-practice process framework for managing all your change-related activities, such as analyzing costs and resources, coordinating an external specialist, carrying out risk assessments and devising a roll back plan. You could even coordinate scheduled internet downtime, obtain business approval, document changes and update your Asset Management and CMDB modules - all from within SysAid.

Another likely scenario is upgrading user workstations from Vista to Windows 7. SysAid's ITIL Change Management module automates the step-by-step workflow and chain of approval, which usually includes checking compatibility of existing hardware and software with Windows 7, ensuring proper licensing, arranging

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alternative workstations, acceptance testing and user training. You could also set automatic change templates for future upgrades.

In both cases, SysAid's ITIL Change Management module enhances efficiency and coordination of required change processes using ITIL best practice methodology, to ensure smooth transition with minimal impact to services and operations.

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First Chapter: Change Management

Please note: In the ITIL package the menus have been expanded to fit the package functionalities. You will notice **Service Desk** menu link instead of **Helpdesk**. This link includes the sub-menu options: **Change Management** and **Problem Management**.

How to Create a New Change

To be able to Create a new change, you should first have a permission to be the change manager. To set this permission, go to:

Preferences-> **User Management**

Click the row entry of the administrator you wish to set as a change manager-> **Permissions** tab, and check the box

☑ Change Manager (Create and design Changes / Problems)

There are 2 methods to open a change:

1. Create a change from within an incident. Click the icon from within the incident. In the popup window select Change in the first dropdown list, and select a template in the second dropdown. This will create a new change, and a link between the new Change and the Service request it originated from. Based on the Settings under **Preferences-> Service Desk Settings-> General Settings**, the statues of the service request you originated from will change.

2. Create a new Change, which is not linked to any Service Request

To open a new change which is not based on an existing SR,

Go to **Service Desk**-> **Change Request**

Click the **New** button.

A popup screen opens. In both cases you are required to choose your change template from the dropdown menus in the popup. Note that the change templates

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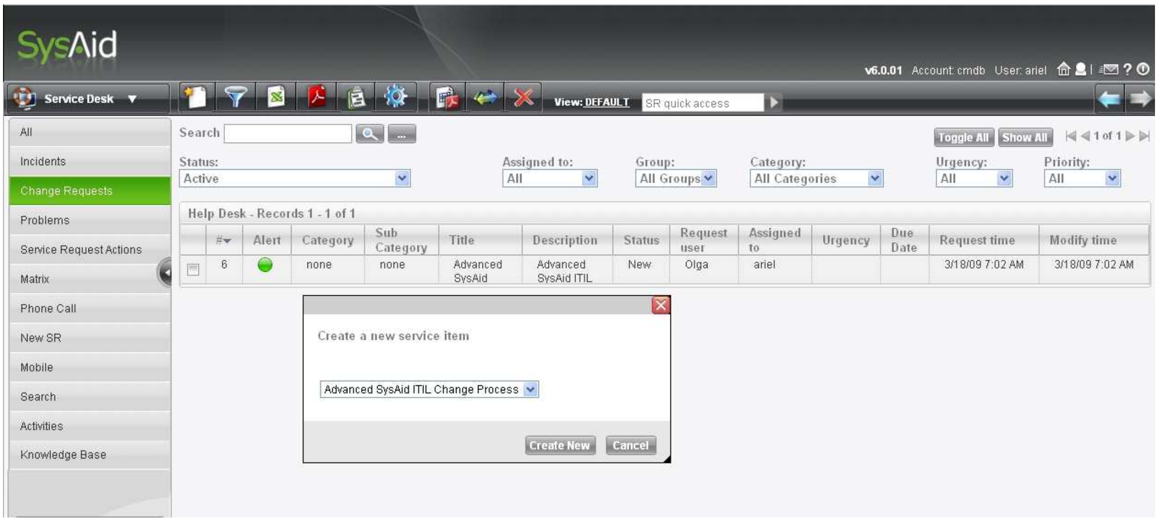
available in the dropdown menu of the popup screen are related to the category, sub-category, and third-level category of the incident. Initially you will have only two templates in your system: Basic Infrastructure change process, and Advanced SysAid ITIL change process. Choose which template to base your new change on, according to the complexity of your change, and the process you want it to follow. Click the **Create New** button.

1. Popup for Creating a New Change



In your new change, under the **Change Details** tab, complete the details of your new change: category, title, status, description, assigned to, etc. The fields can be pre-populated based on the template you chose.

2. New Change Request Details Tab

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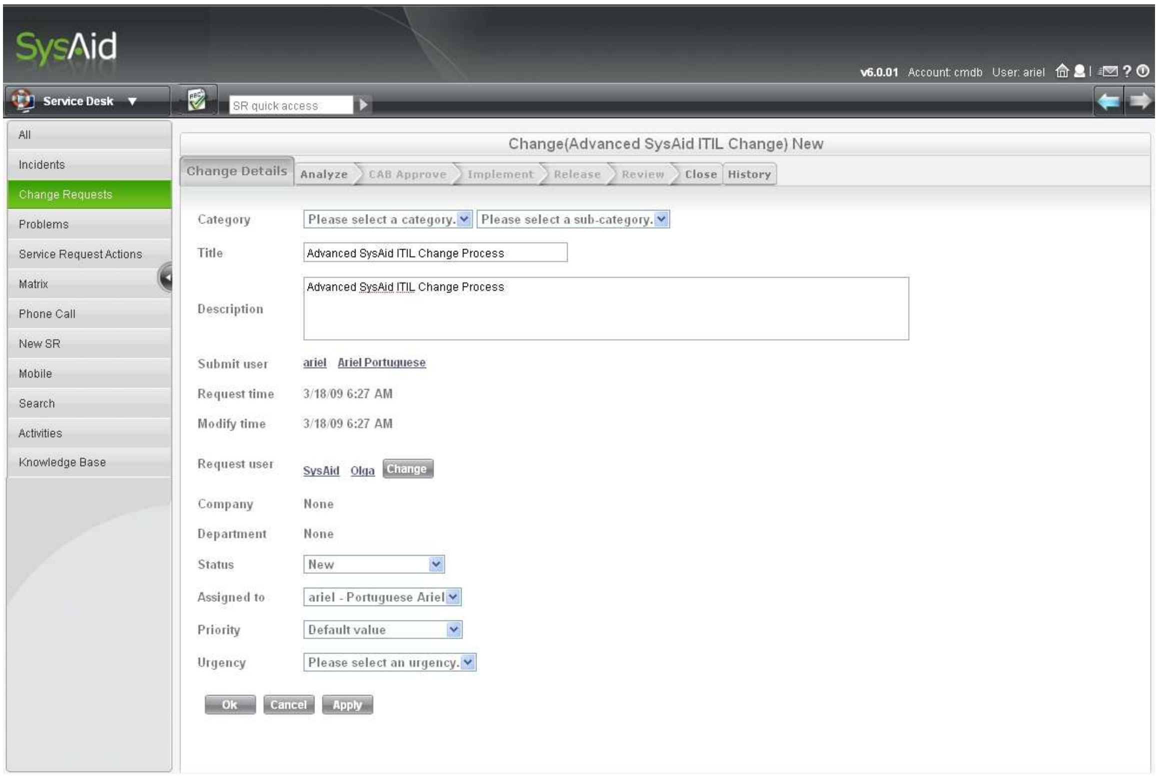

Following the Change Details tab you will notice a line of arrow-shaped tabs. These are the workflow tabs. They describe the direction in which your change process progresses. In the default basic template the arrow shaped workflow tabs are: Analyze, Approve, Review, Close and History.

3. Workflow tabs in the Advanced ITIL Change Template

Under each of the workflow tabs you can find another line of arrow-shaped sub-tabs. These are the **action items**. Action items are the main part of the change; they hold information about all the actions that need to be executed in order to progress in the change process.

For instance, under the Analyze workflow tab you can see two action items: Resource Assessment and Risk Management. Note that each Action item may depend on other actions items.

4. Action Items under Analyze workflow tab, in the Advanced ITIL Change Template

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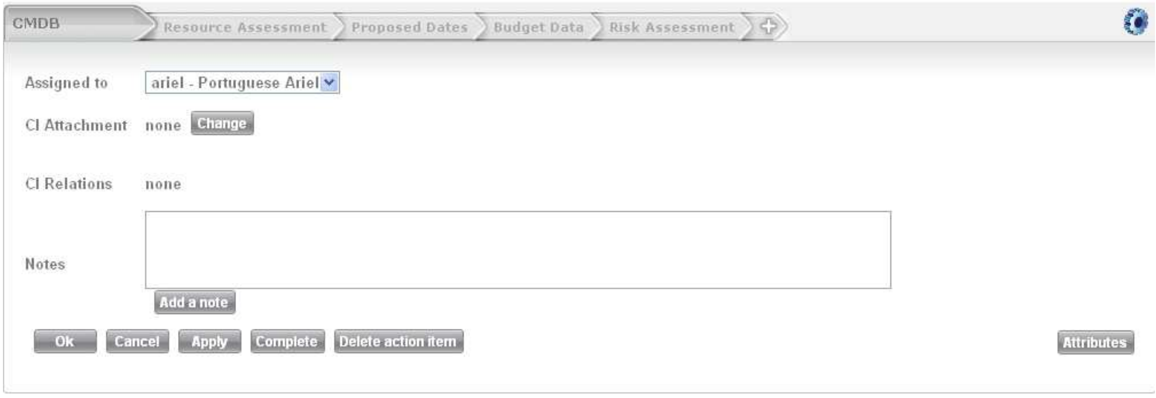
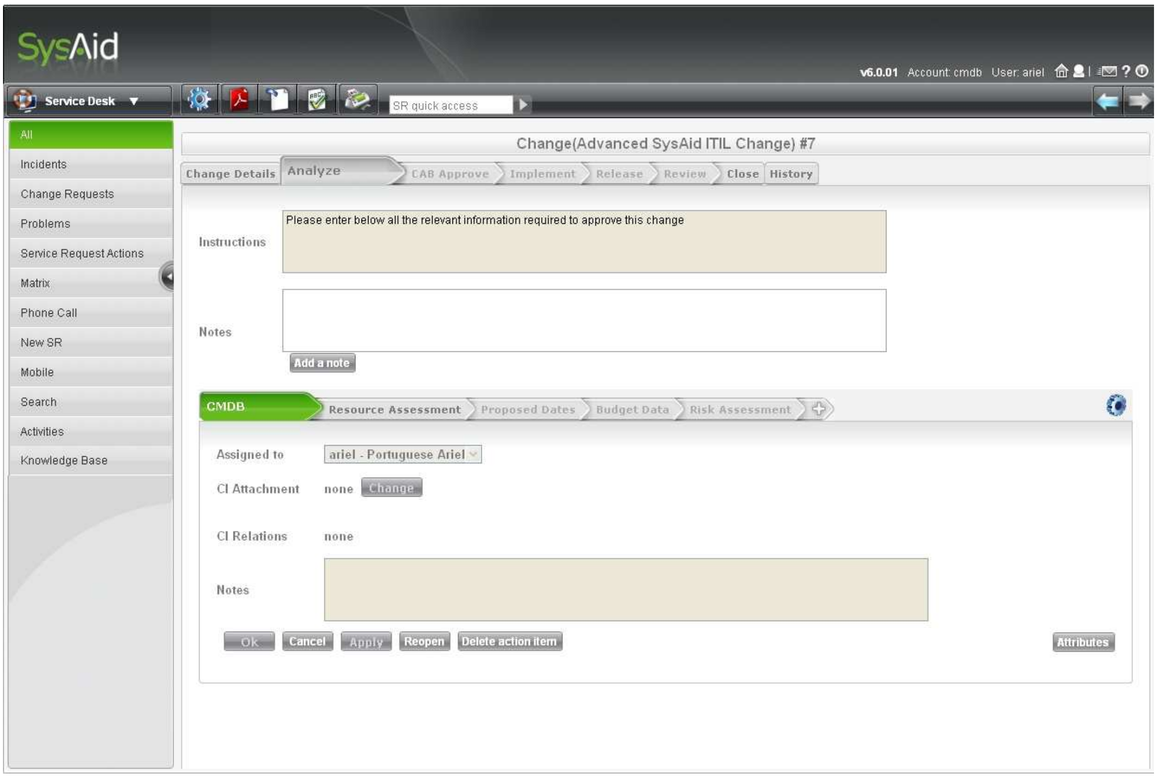


Each of the action items must be assigned to a specific responsible administrator. The action items can be dependant on one another, so only when the first action item is completed will the next action item be enabled for the responsible administrator. They can also be dependent on several other actions items. See the chapter The **Change Manager**, the **Editing Attributes** section, for further details.

Each action item includes a form with fields to be filled out by the responsible administrator. Other administrators will not have access to see each others action item details unless they have an appropriate permission. To allow an administrator access to see action items that belong to others, make sure this administrator has the appropriate permission. (Under **Preferences-> User Management-> Permissions** tab). Once the responsible administrator has completed all the required actions and filled-in all the fields, he/she can click the **Complete** button, that can be found at the bottom of each action item form. Clicking the Complete button locks the action item and causes it to be painted green.

5. A completed Action Item, painted green



Note that in case after clicking the **Complete** button, the responsible administrator wishes to edit again his/her action item, they can do so by clicking the **Reopen** button. If there are action items that depend on the re-opened action item, they will be re-opened too. The responsible administrators will be notified that their action items have been re-opened, so they will be able to review the new information and see if they need to revise their inputs according to the new information.

Once all the action items of the change process under the first Workflow tab have been completed, the first workflow tab above will be painted green. In the case of the default basic template, the first workflow tab is **Analyze**.

6. Completed Action Items - The first workflow tab is painted green.

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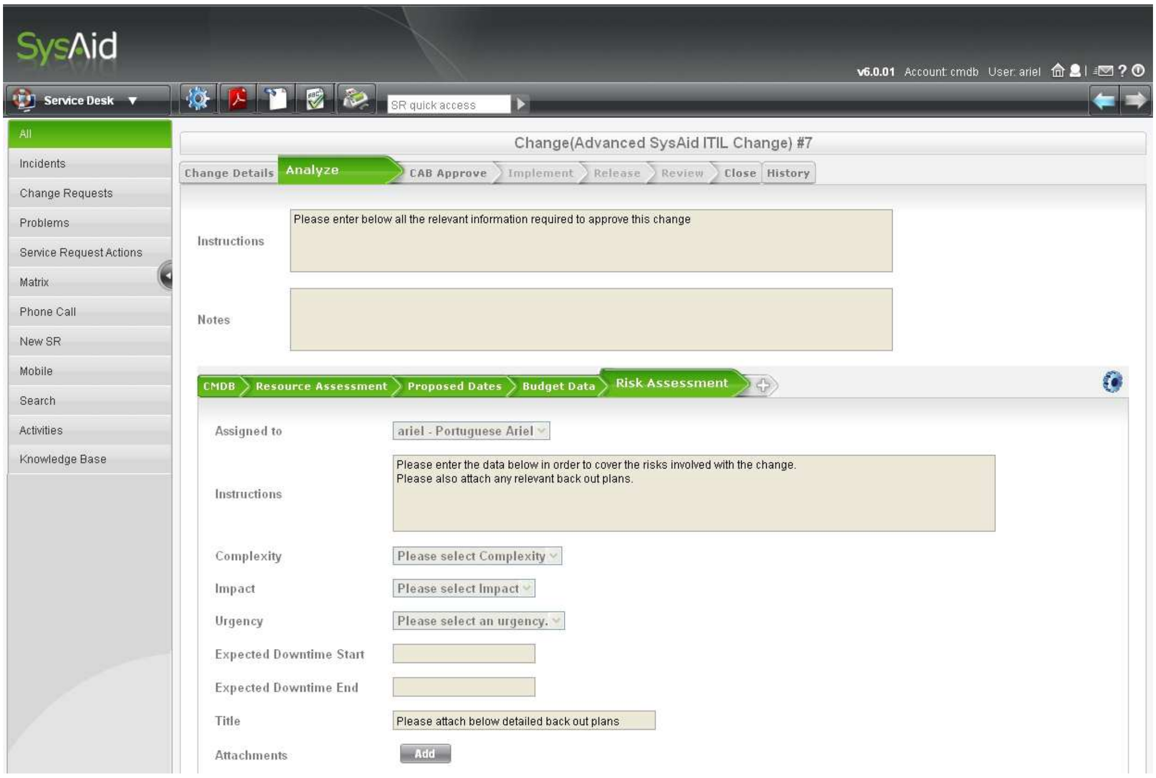

The next workflow tab to be completed in this template is **Approve**. You will be able to notice that once the change has reached this stage, the status in the Change Details tab will automatically be changed to **In Approval Process**. This is based on the settings of the specific action item. See the **Editing Attributes** section in the **Change Manager** chapter in this guide to learn how to configure an automatic update of statuses for action items.

In this way your change process can continue, with each responsible administrator filling in their own information, according to their role in the change process. The status of the change will progress accordingly.

In the template there are recommended statuses for the change:

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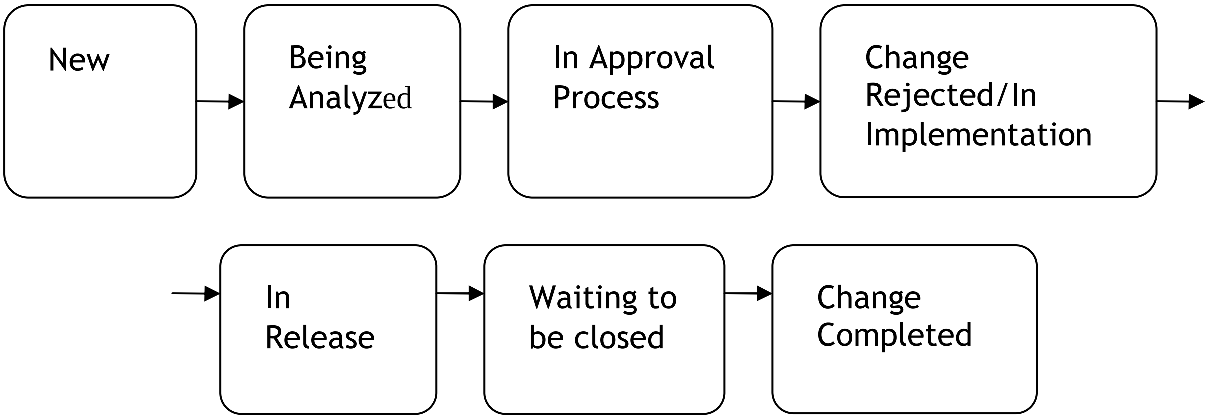

Once the change process is completed, and all the action items and workflow tabs are painted green, it is time to close the change. To do so you need to go to the **Close** workflow tab, and update the status to **Change completed** from the status dropdown list.

It is recommended to keep the information about the change in your knowledgebase, as it might be handy in planning and conducting future changes. If you choose to keep the change in the knowledgebase, add a summery and your conclusions, or any process improvement suggestions you may have, in the **Solution** text box.

Finally, click the link **Add to Knowledgebase**. This will enable you to build your knowledgebase with the accumulated experience in your environment.

Keeping the End User Updated in the Change Process

The end user who submitted the service request can be automatically notified by SysAid when specific statuses are reached, during the change process. Updating the statuses in the change process can automatically update the status of the incident on which the change is based. Thus you allow the end users to follow the change process, and keep them updated. For instance, you may want to notify

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your end user when the change process reached the CAB (Change Advisery Board) approval stage.

How to determine which stages in the change process, if any, will be reported to the end user who submitted the service request, is elaborated on later in this guide.

Permissions and Views

Administrators who take part in the change process and are assigned action items, but are not the change manager, may access the change and review the outline of the process displayed by the header of each workflow tab.

By default they are unable to see the action items assigned to other administrators, unless they have permission for this.

To set such a permission to view other administrators' action tabs, go to:

Preferences-> **User Management**

Click the row entry of the user you wish to allow to see other administrators' action items.

Under the Permissions tab, check the box **View other Admins' action items**

Click **OK/Apply** to save the new permission for this user.

Even with a special permission, they can only view action items that are not assigned to them, and not modify them.

Therefore the information you wish to share with other administrators who participate in the change but are not permitted to see the others' action items, should appear in the workflow tab header section for each workflow tab, and in the Request details tab.

7. No Permission Notification

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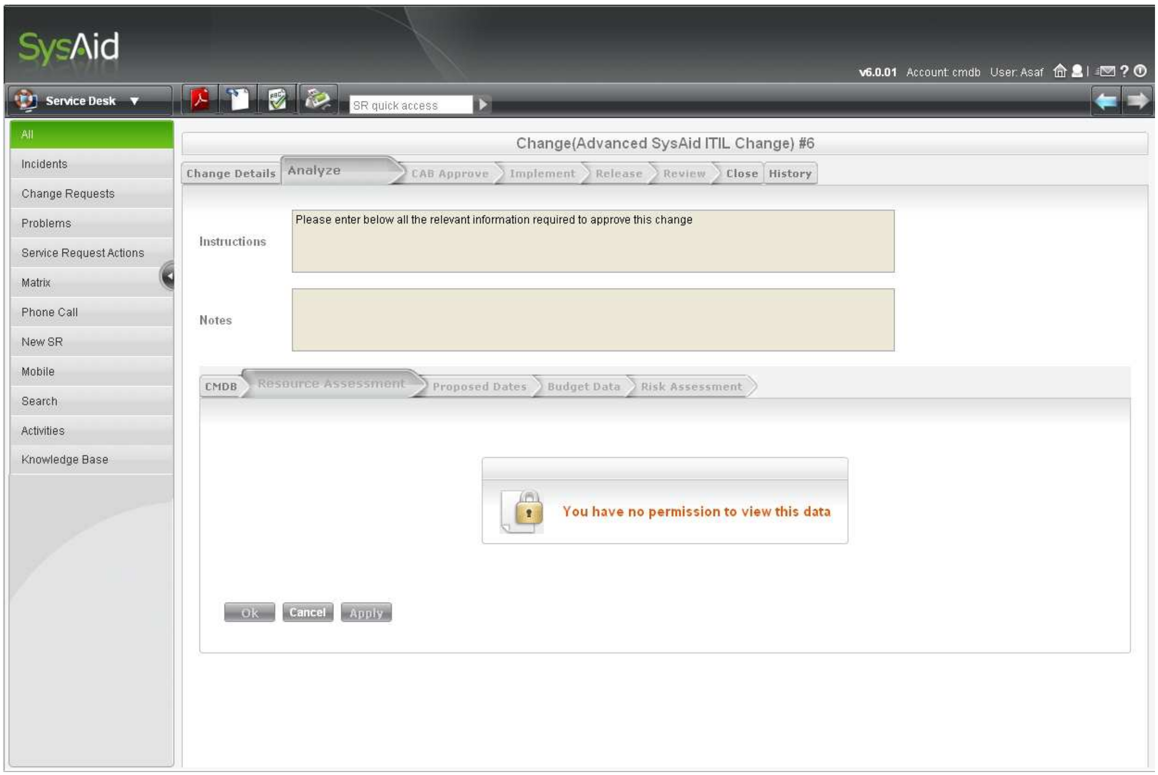

Service Desk Menu-All

Here you can list all service requests and search them in the list. A special functionality has been added when you filter the list by administrator. You will see not only the changes assigned to that administrator, but also action items assigned to the chosen administrator from changes assigned to other administrators, in green text. This indicates that although they are not responsible for that change they have a specific active action item assigned to them within that change. By clicking that specific line, they can reach the specific action item they are responsible for, within the change.

Linking Service Requests to Changes

If you have created a changed that is linked to an incident you will be able to see the linked requests in a frame that is added to the bottom of the service request

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page. The frame contains a list of service items that are linked to your change.
The different icons represent different types of service requests.
By Clicking the Add button in the frame, you can add to the Change links to any other incident or service item in your system.
Notice the different icons available for these links:

 creates a link to a change

 creates a link to an incident.

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The Change Manager

The change manager is an administrator who is responsible for a specific change. Note that only the change manager can create, update, customize, or delete action items in the change process. The change manager is also the one to set the different forms under the different tabs, to assign action items to administrators, and to determine the dependencies between the tabs. Other administrators who participate in the change process will not see the **Delete** button, the plus **+** button, or the **Attributes** button and **Customize** icon. The change manager can also fill in data under action items that are assigned to other administrators, when needed. In the History tab you will be able to see who has filled in the fields in the action items.

To nominate an administrator as a change manager, go to **Preferences**-> **User Management** -> Click the row entry of the user you wish to set as a change manager.

Under this user, go to the **Permissions** tab and check the box:

☑ Change Manager (Create and design Changes / Problems)

Click **Save**.

Under **Service Desk**-> **Change Requests** click the **New** button, and choose an appropriate template in the popup screen. Alternatively, create a change based on an incident, as describe in the previous chapter.

Fill in the change details.

You will notice, under each workflow tab a line of action item tabs. As a change manager, you will be able to assign each action item to an administrator, choosing from a dropdown menu. Note that the change manager him/herself may be assigned action items and may take an active part in the change process, or not.

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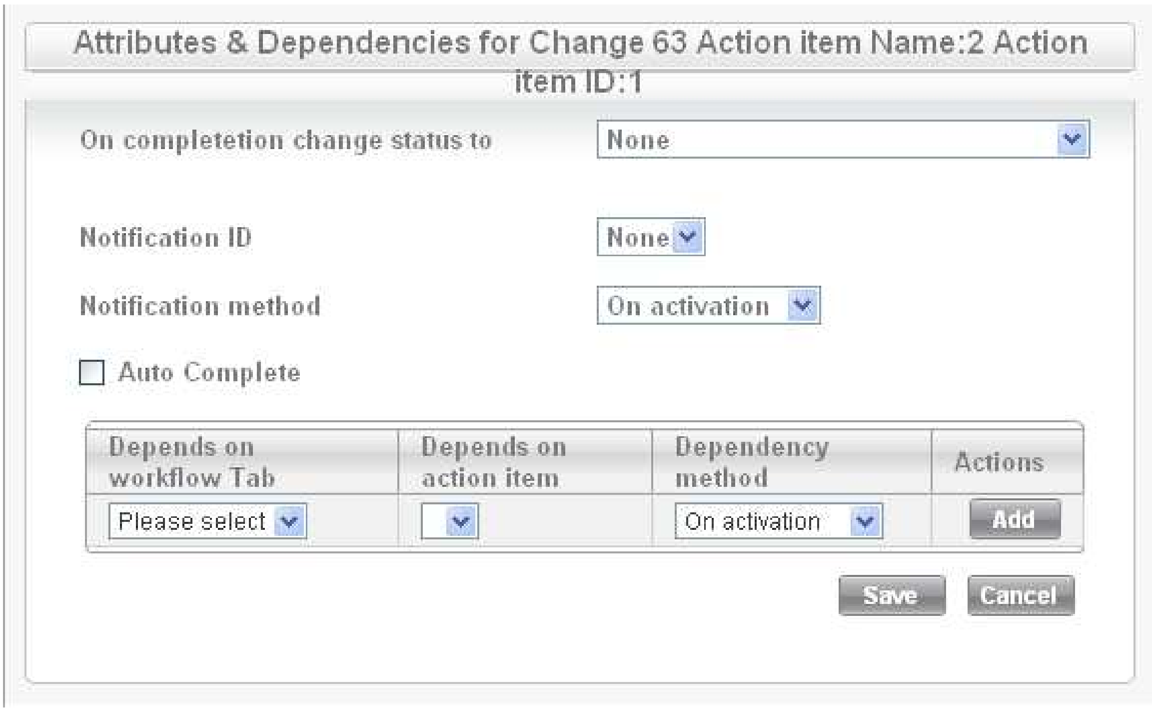
Editing Attributes

The attributes of action items can help you determine which new statues will be valid when that certain stage of the change process is completed. You can set an automatic notification that will be launched when the action item is enabled or completed, and which other workflow tabs each action item depends on. Click the **Attributes** button from within the action item to edit attributes.

8. Attributes popup screen



The modifications you have saved in the **Attributes** popup screen will be valid for the specific change you are dealing with, and will not affect the template. Note that the attributes of your different action items are determined according to the template you based your change on.

The upper dropdown menu in the Attributes popup screen is **On completion change status to.** You can use this dropdown to choose to which status the action item will be automatically changed to once it is completed.

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Next, there are two more dropdown menus that can help you choose the ID and the method of the notification that will be sent to the responsible administrator once the action item is either completed or activated.

The auto complete checkbox can be used when you want to defined an automated action within the change workflow.
For example, in case you wish to determine that once a certain administrator completes his/her assigned actions, SysAid will automatically notify the manager , or open a service request. In such cases, you need to define a new action item, define the notification ID and method, and check the Auto Complete checkbox for this item. Make sure the auto completion depends on the completion of the relevant action item. As soon as that action item will be completed, the next action item will be enabled, and SysAId will send the automatic notification and complete the action item so the change process could progress to the next stage.

You can customize different dependencies between the action items using the table at the bottom of the Attributes popup screen.
An action item can depend only on action items that appear before it in the workflow process. An action item can depend on either a single or a few other action items that appear before it. Yet , an action item can also be independent of other action items, if you choose. In this case it will be enabled for the responsible administrator as soon as the change is created.

You can add action items to the change process by clicking the plus **+** tab. Note that this will copy the last action item tab in the row. Duplicating the action item for a specific change can be useful in certain cases, for instance, when you wish to have two different reviews of the risk assessment, from two different administrators. In this case, you can choose a different administrator for the duplicated **Risk Assessment** action item, using the dropdown menu. Another example could be in cases you want an additional approval from a different administrator. To delete an action item, click the button **Delete Action Item** at

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the bottom of this item. When you delete or add action items, make sure you review the attributes and that the process is properly defined.

If you wish to create a new action item, with a different title and different fields, you have two options:

A. Add a new action item that will be permanently added to a change template (see next chapter for a detailed explanation), or,
B. Create a one-time action item, for this change only.

The second option is less recommended, since the idea of managing a change is to create recurring templates that will assist you in managing future changes.

Add an Action Item for a Specific Change Process, without Influencing the Template.

Most of the modifications of action items should be performed in the Change template. An extensive explanation about the modifications in Change Templates can be found in the next chapter in this guide.
However, occasionally you may want to add or modify an action item just for the current change process, without affecting the general template. You may want to add someone to the approval process of a specific change without changing the template.

To add a new action item inside a specific change, that will not be added to the template:

1. Click the plus **+** icon in the line of action items
2. Click the **Customize**  icon.
3. In the popup screen that opens, click the **Change** button.

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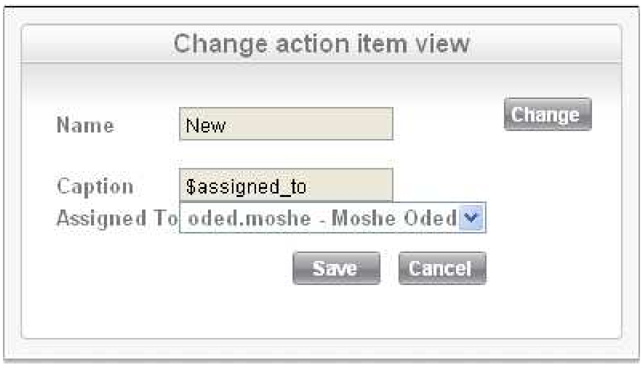
9. Change Action Item View popup screen



4. A popup presenting a list of available action item views opens. If the action item view you need for your change process already exists on this list, click the name of the action item view you need, and then click **Save** in the **Change action item view** popup screen.

10. A list of existing action items you can add to your change template

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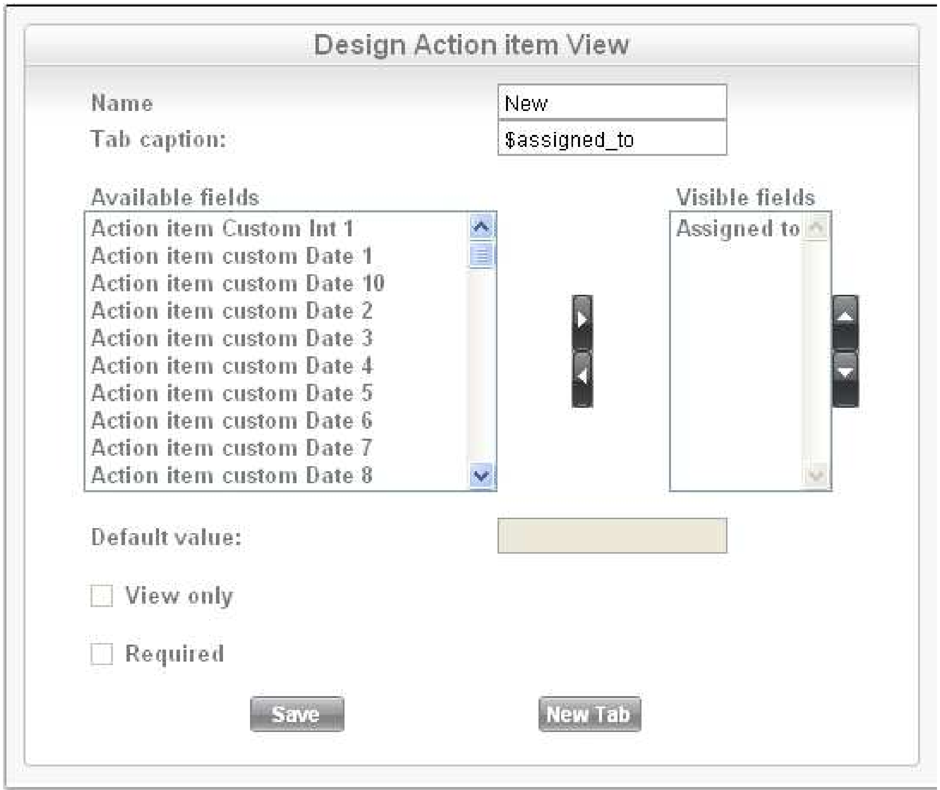
5. However, if the action item you need does not exist in the list of available action items, click the **New** icon in the **Select action item view** popup screen.
6. A new popup screen opens, called **Design Action item View,** which allows you to edit your new action item view name and caption, choose the fields that will appear in this item, and other designing options.

11. Design Action Item view popup screen



7. Click **Save**, and go back to the **Select Action Items** popup screen. Search your new action item, (which is now added to the list) and click its name.
8. In the **Change Action Item view** popup screen, click to save the new selected action item view.

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You will be able to see the new action item you defined, replacing the duplicated action item that was created when you first clicked the plus **+** button.

In a similar way, you can edit an existing action item view. Please be aware that this will cause all action items using this view to be updated with the new fields and settings you have applied, in other changes and other templates. For instance, if you wish to add or remove fields from the current action item view:

1. Click the **Customize** icon
2. In the popup screen that opens, click the **Change** button
3. Check the box next to the title of the action item you wish to edit
4. Click the **Edit** button
5. In the popup screen that opens, **Design Action Item View**, edit your action item according to your preferences.
6. Click **Save** in the popup screens: Design Action item View, Change Action Item View, and Select Action Item View
7. Your modifications have been saved to the action item.

The change manager cannot redesign the workflow tabs of a specific process from within a service request. To change the workflow tabs you will need to create a new Change template based on a new sub type, specific to your new change process (See chapter 3 in this guide).

Below is a diagram that illustrates the different options for customizing your action items. See the Appendix of this guide for a flow chart that shows these options.

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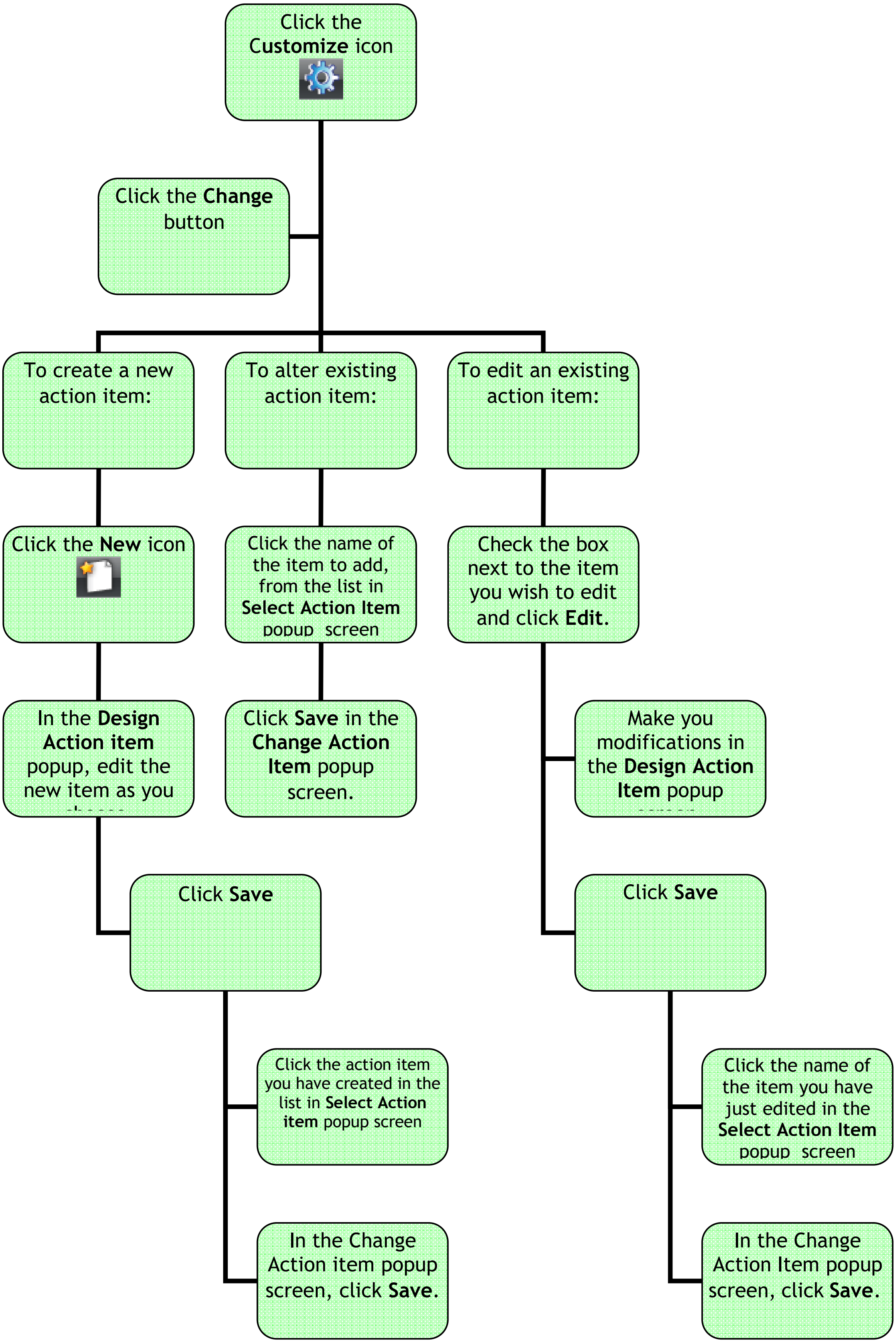

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The change manager cannot redesign the workflow tabs of a specific process from within a service request. To change the workflow tabs you will need to create a new Change template based on a new sub type, specific to your new change process (See the next chapter).

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Creating and Modifying Change Templates

SysAid allows you to create templates to manage change processes in your organizations. The templates secure that all the changes will be managed as pre-defined processes, thus minimizing the risk involved with changes. Each change must follow the proper process and template based on the relevant category of the Change.

The change manager can add Action Items, remove Action Items, control attribute, create various views that include different fields, and add data and instructions to the change template.
The template consists of two parts: the workflow frame/outline and the action items.

1. The workflow framework, is defined per service request Sub type.
Each subtype holds the definitions of the workflow frame without the action items. (tab types, name, order and the fields available under normal tabs)

2. The action items and the workflow tab header are defined per template.
You may have several templates with of the same subtype carrying out the same workflow outline – but with different actions items and tab headers, the data itself may also differ between templates.

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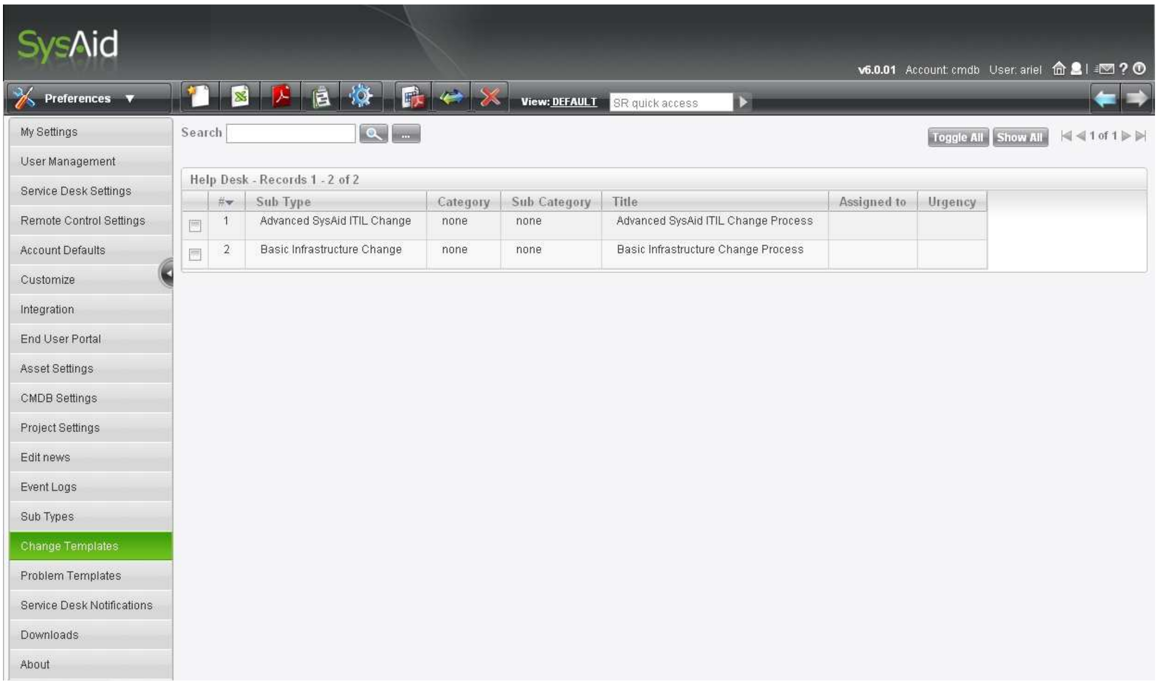
12. Change Templates



To create a new change template go to **Preferences-> Change Templates**

You will find two pre-defined change templates in SysAid:
Advanced SysAid ITIL Template and Default Basic Infrastructure Change.
To edit these templates, click their names in the table. To add a new template, click the **New** icon .

You will notice each template has a sub-type dropdown menu at the top of its **General Details** page, since each template must be based on an existing sub type. The sub-type holds the workflow frame, or outline.

If you want to create a new workflow frame or outline, you need to create a new subtype representing that process. When a subtype is created, a basic template is automatically created for that subtype, using a default process. You may access the settings of this sub type and add or remove workflow tabs, and customize the normal tabs to fit your process.

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To edit the template, under the workflow tab you wish to modify, click the **Customize** icon. Note that while editing the template, you can edit both the template and the sub type frame.

1. The changes you make in the Action Items will influence only the current template, and not the entire sub-type. Likewise, any modification in a workflow tab (tabs in the upper part of the page, shaped as arrows) in the following fields, will influence the template alone: the chosen action item view, the Assigned to field, and adding or removing action items.
2. Other sorts of modifications you make, such as creating new Tabs, changing Tab Caption, or selecting whether the tab is visible or not, will change the subtype. Changing the sub type will adapt all the templates that belong to the same sub type to the new outline. Similarly, any modifications in the non-arrow-shaped tabs in the template (the General Details tab, the History tab, or the Close tab) will also influence all the templates of the same sub type.

You will notice that fields you have determined as "view only" will still be editable in the template. These fields will be non-editable in the changes you will create later, that will be based on your template. They are editable in the templates, so you can easily add information to them. Similarly, all the action items are enabled in the change template, so you could edit them according to your preferences. Action Items that you will define as dependant on other action items will appear disabled in the Change that you create based on the template you create, yet they will be enabled in the template itself, to allow you to edit the data inside these action items.

To view and to edit the sub types of your Change templates, go to **Preferences-> Sub Types**. Click the name of the sub-type you wish to modify. You can only edit

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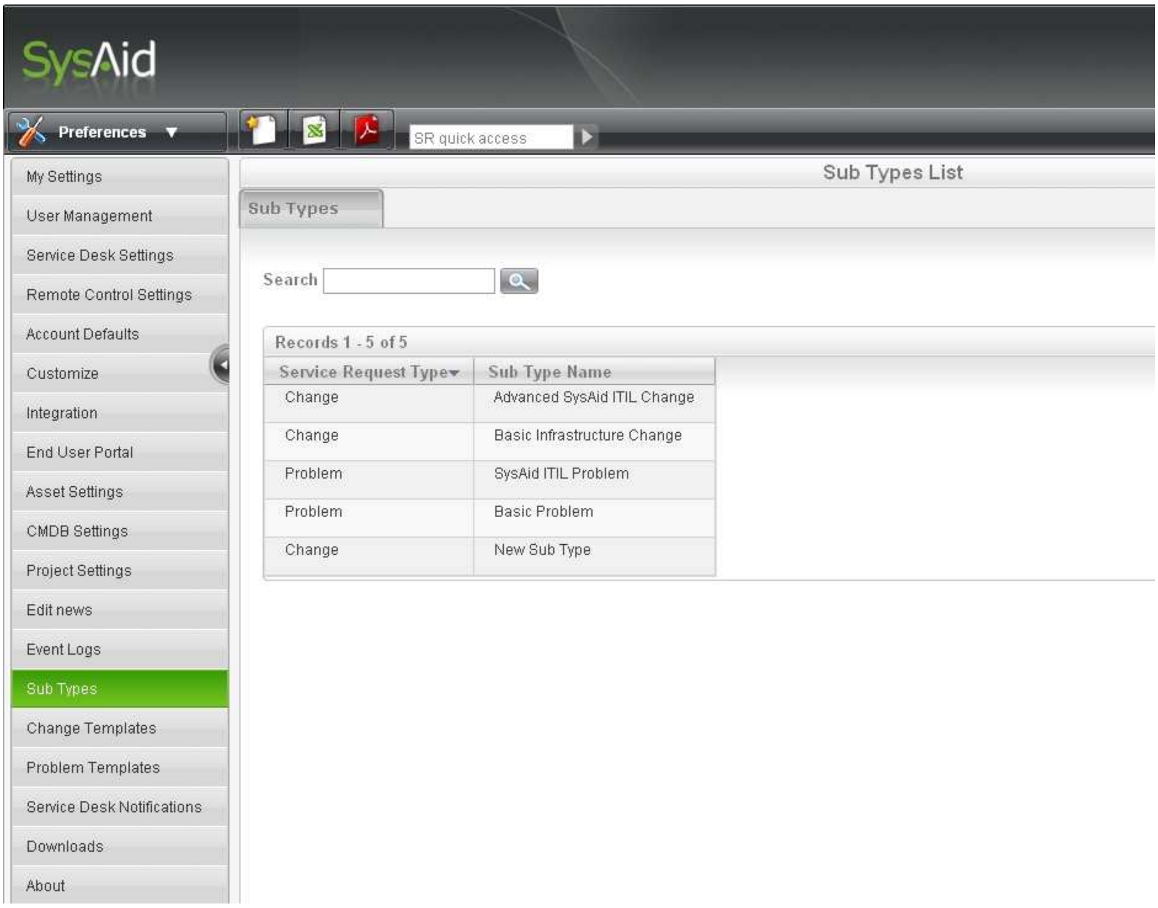
the name and the type here. To create a new sub type, simply click the **New** icon .

13. Sub Types List



Adding action items, changing their views and defining the dependencies between action items is performed in the same manner as explained in the previous chapter of this guide.

Please remember that editing a template (not a subtype) will only affect future Change processes based on that template, while all the changes that already exist will remain as they are.

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However, changing the framework process of a subtype will change the way all changes based on that subtype are displayed.
If you wish to change the outline of future changes, you should create a new sub type and update the existing templates so they would be based on the new sub type. You can also choose to create a parallel set of new templates based on the new sub type.

Note that in any case, deleting templates does not affect the changes that you have already created.

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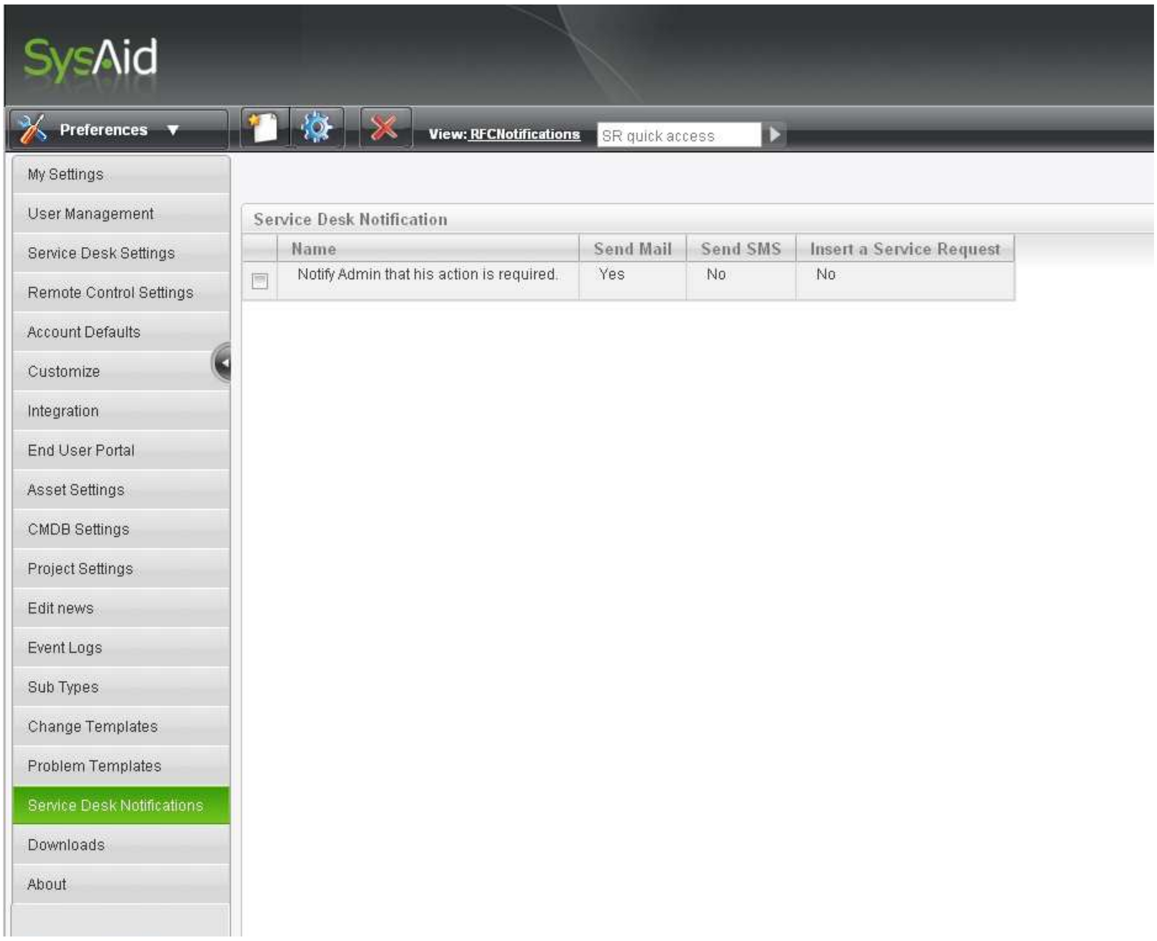
change settings

Creating the Change Notifications

;As the change manager, you would also want to create and edit the notifications that will be sent to different administrators involved in the change process.

14. Service Desk Notifications



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To do so, go **to Preferences-> Service Desk Notifications**-> Click the row entry of the notification you wish to modify. Alternatively, click the **New** icon to edit a new notification for your Change template. Under the **General** tab you can determine whether the notification will be sent as an SMS message, email message, or as a new service request in SysAid. You may choose more then one option for each notification.

On the next tabs you can edit the details of your automatic notification, according to the choice you have made in the **General** tab.
Three new tags are available within the notifications. These tags allow you to define generic notifications:
$ProcessManager – This tag presents the user name of the administrator to whom the change is assigned (the Change Manager).

$Assigned_to_sub – This tag presents the user name of the administrator to whom the action item is assigned.

Determining The Statuses of Service Requests Linked to Changes

Under **Preferences->Service Desk Settings-> General Settings** tab, you can find a dropdown menu that helps you determine how the status of the incident will be updated when creating a linked Change from an incident. Note that the update of the status of the incident will occur only when a new change is created. To determine other changes in the status of the incident, during the progress of the change, go to:

Preferences-> Service Desk Settings-> Change/Problem tab, you can determine how the status of incidents that are linked with changes will be updated, according to the updates in the status of the change. For instance, you may determine that once a Change reaches the status Change Completed, the linked incident status will be automatically updated to Verified Closed.

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Chapter 2: Problem Management

The SysAid Problem Management module will not only help you resolve service requests and incidents as the arise, but also enable you track and resolve root problem causes to prevent future recurrence .
Identify and eradicate root problem causes in your organization with the SysAid Problem Management.
Use ITIL best practices to minimize incident-related impact to business and operations.

In SysAid - Incidents ,Problems and Changes are managed separately to allow you to properly manage all IT related Service Requests.

SysAid includes two default problem templates you can start using immediately.

Managing problems, defining and updating templates, and more options, are described in details in chapter one of this guide- **Change Management**. Please refer to it for further details.

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Chapter 3: SysAid CMDB

CMDB are the initials for Configuration Management Data Base. The CMDB is a repository of information related to all the components of an information system. In fact, the CMDB is a data base that keeps information about all your network assets, software products and catalog items, as well as all the information about the relations between them.

The SysAid CMDB helps your organization understand the relationships between components and track their configuration.

The SysAid CMDB can be useful for storing information about many kinds of items. For example, even a Taxi station can use SysAid CMDB to keep track of the different vehicles, drivers, destinations, garages, and other relevant components and information.

As long as you maintain and keep your CMDB up-to-date, you will be able to enjoy the associations SysAid creates between your various configuration items. Here are a few examples for configuration items you can set and manage in your CMDB:

- hardware (including network components where relevant)
- system software, including operating systems
- business systems - custom-built applications
- software packages
- database products
- physical databases
- environments
- configuration baselines
- Policies (Backup, Security etc.)
- configuration documentation, e.g. system and interface specifications, licenses, maintenance agreements, SLAs, decommissioning statement
- other resources e.g. Users, suppliers, contracts
- other documentation e.g. IT business processes, workflow, procedures

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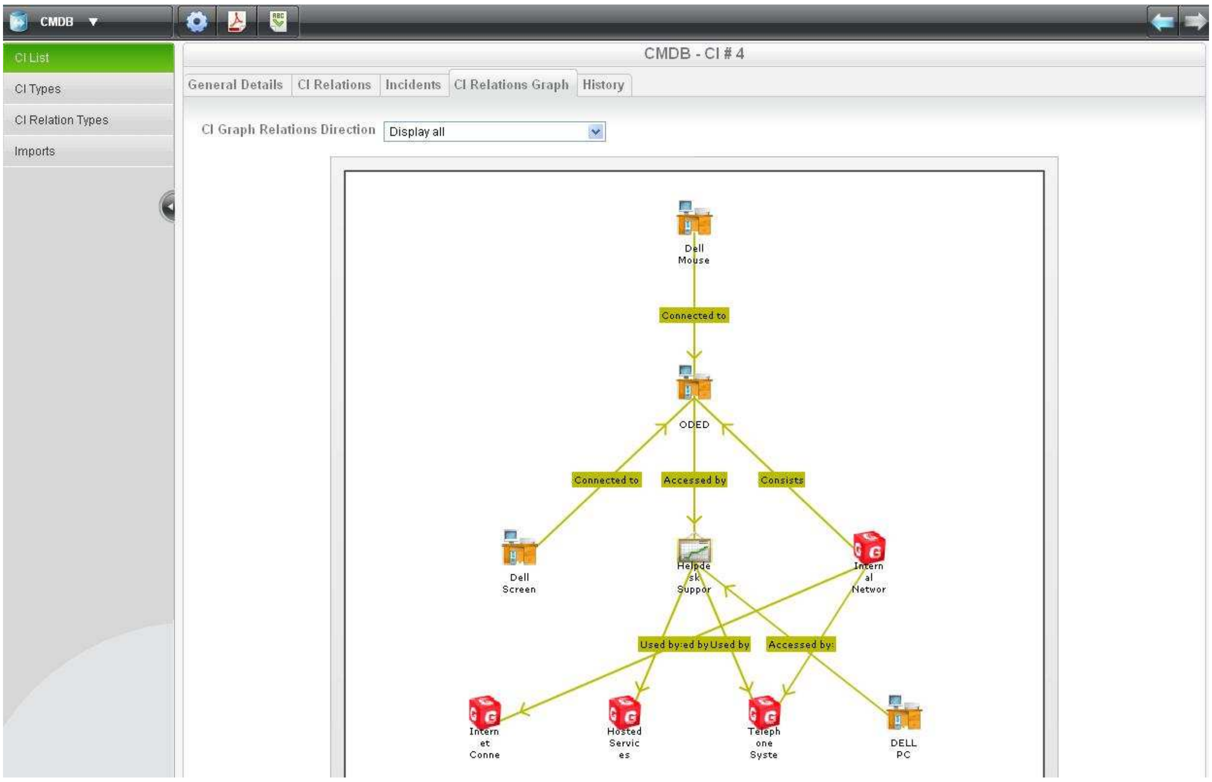
15. CI Relations Graph



For more detailed instructions and information about **SysAid CMDB**, please consult [*http://ilient.com/down/CMDB.pdf*](http://ilient.com/down/CMDB.pdf) **Guide 12: CMDB Guide**,

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Appendix: Flow Charts for Creating Action Items

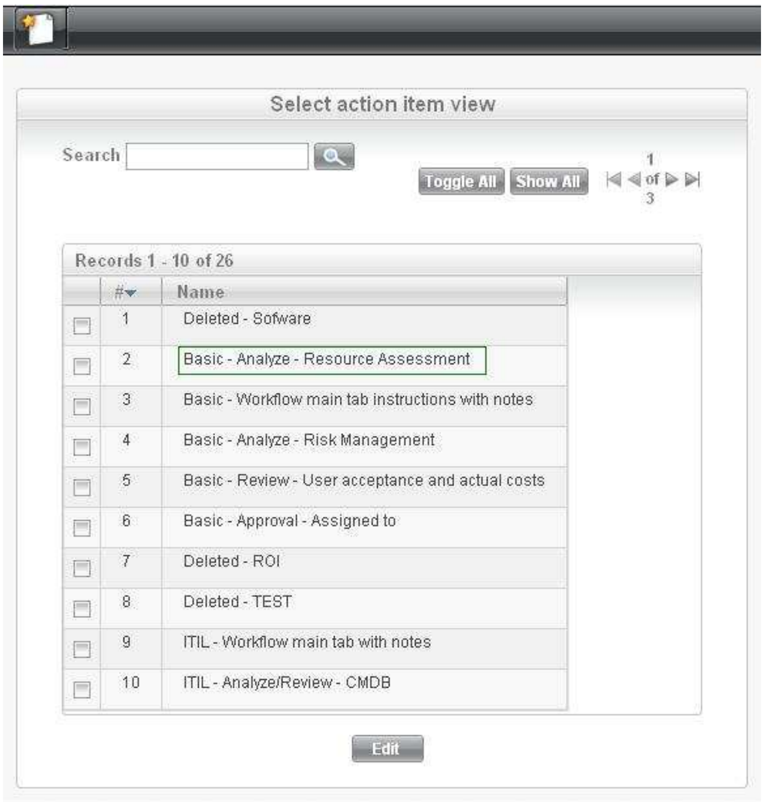
Add an existing Action Item to your Change process:

Click the Customize icon

↓

Click the Change button

↓



Click the name of the item you want to add from the list in Select Action Item View popup screen

Click Save in the Change Action Item View popup screen.

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Edit an Existing Action Item:

Click the Customize icon

↓

Click the Change button

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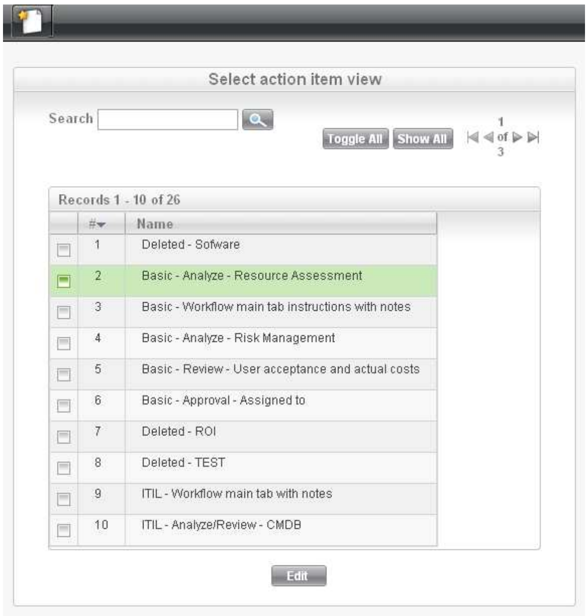


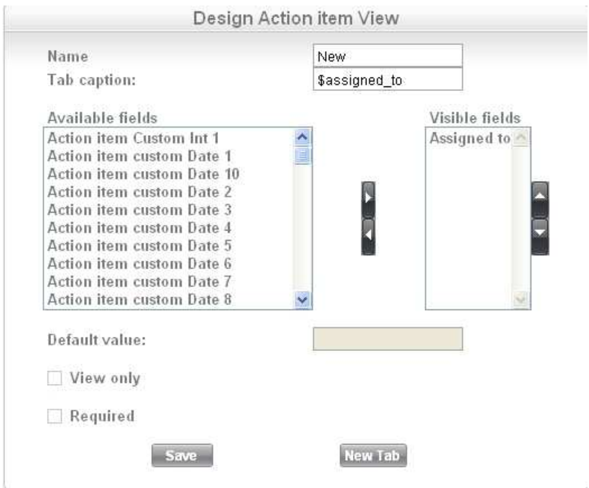
Check the box next to one of the items

and click Edit.

Make you modifications in the Design Action Item

popup screen and click Save

→



Click the name of the item you just edited from the list in Select Action Item View popup screen. In Change Action Item view popup, click Save.

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Create New Action Item:

 Click the Customize icon

↓

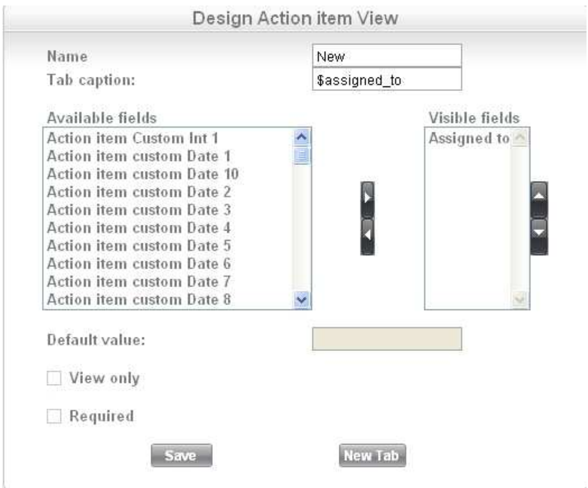
Click the Change button

↓

Click the New icon 

In the Design Action Item view popup edit the new item according to your preferences and click Save.

→



Click the name of the new action item you have just created in the list in Select Action Item View popup screen. In the Change Action Item View popup, click Save.

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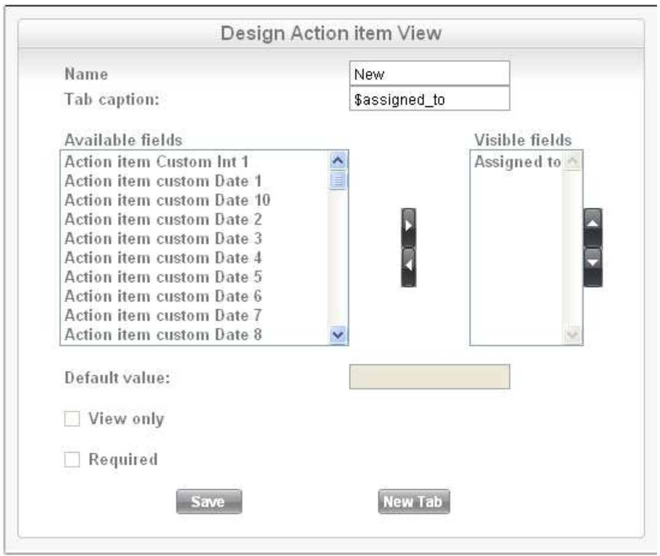
Click the Customize icon

↓

Click the Change button

→ Click the New icon 

↓



In the Design Action Item View popup, edit the new item according to your preferences, and click Save.

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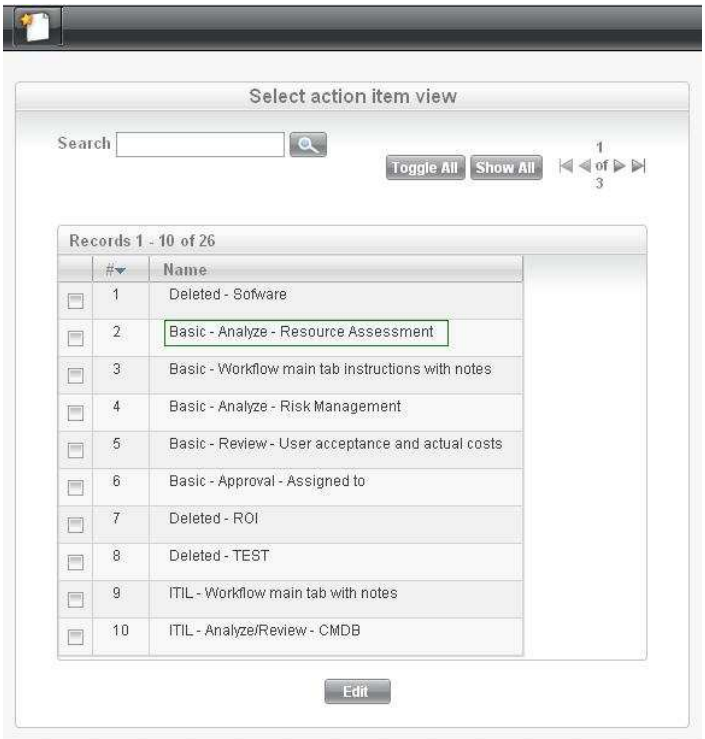

Click the name of the new action item you have just created in the list in the Select Action Item popup screen. Then Click Save in the Change Action Item View popup screen.

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