myIT Tool – Incident & Request Management

Introduction

Hello and welcome to the Information Technology Service Management Tool Training, also known as myIT.

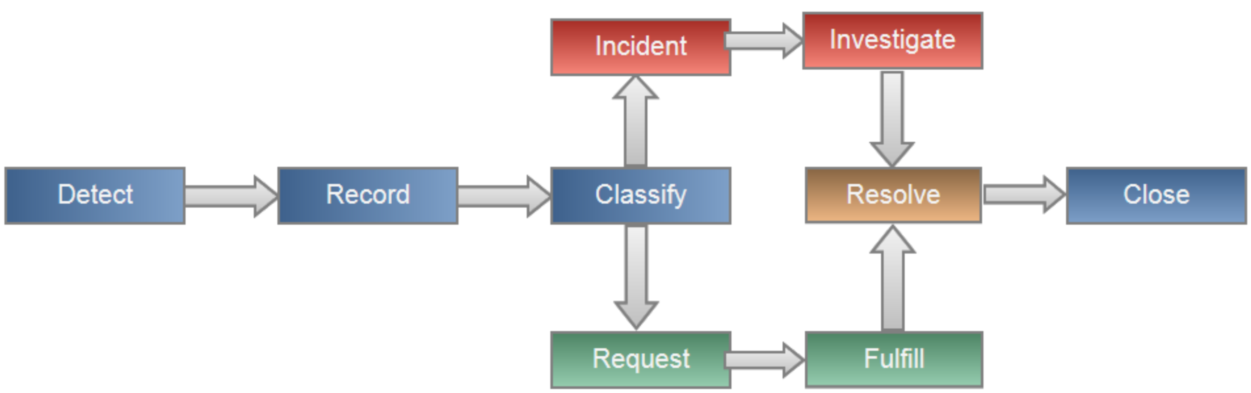
The IT Service Management Initiative, or ITSM, was designed to improve the quality of technology services and support for campus. This initiative aims to increase the efficiency and consistency of services provided to faculty, students, staff and the greater UF community. This will be accomplished through three guiding principles: One Customer View, One Process, and One Tool.

In this module we will be exploring the One Tool aspect of the guiding principles. We will also exhibit how the use of this one tool will impact our One Customer View as well as how we will utilize the One Process guideline to navigate within the Tool.

We will begin with the process as it pertains to Incident and Request Management.

The Process

UFIT engaged in several cross-functional workgroups to develop a single-process for incident and service request. The standard process workflow for incident and service request management is as follows.



1. **Detect** – The detection occurs through the method that the front line processor receives the request or incident. That is whether the notification from the customer occurred via email, phone call or direct submission into the service management tool portal.
2. **Record** – You will record the incident/request in the myIT service management tool. We will go into detail about this step a little later in the training.
3. **Classify** – The classification step is crucial to the incident/ or service request management process. Through the classification process you will drive several other variables of the process. The primary resource for classification will be the service portfolio.

   a. **Service Portfolio** – The service portfolio is segregated by four major categorizations. They are Admin Services, Research Services, Teaching and Learning Services, & Technology Services. Each of these major categories have subsets that include the Service Group, Service Offering, & Sub-categories. Please see the following document for specifics on each category listed.
   b. **Tier/Team Escalation** – The classification of the incident or service request will determine the ownership of the event. Ownership will be separated into teams. Each team will have a tier designation and depending on the level of priority and the particulars of the incident or service request, that tier will need to be determined by the service desk member who is recording the incident or service request. The ownership can be assigned at any level and by anyone who is reviewing or working on the record of event. Please see the following document on Tier/Team classification.
4. **Investigate OR Fulfill –** Once the incident or service request is recorded and classified, the investigation or fulfillment process will begin. Incidents are investigated while service requests are fulfilled.
   This step of the process can vary greatly depending on the specifics of the incident or service request. The myIT Tool does provide some implements for this process. We will cover these later.
5. **Resolve –** For any level of incident or service request there must be a resolution. Depending on the variables associated with the incident or service request, this resolution will differ. The myIT tool does provide resolve functionality that records the details of resolution.
6. **Close –** Once a resolution is determined and then acted upon and the incident/request is now either fulfilled or resolved; the record of the event will then need to be closed.

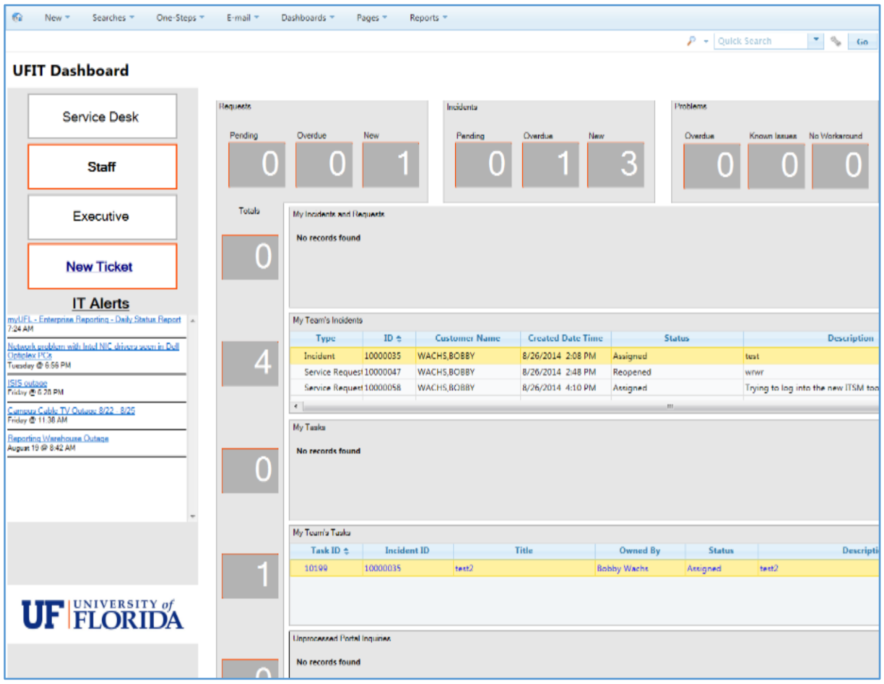
By adhering to this process workflow, UFIT can work as a team to not only resolve customer issues in a timely fashion but to evaluate how these issues are being resolved and determine courses of action that will continuously improve the customer service provided. The myIT Tool offers a central location that can monitor and record every incident/request that is presented to the service desk so that UFIT customer service can adapt and evolve to better serve the University of Florida.

Now let's get into the tool.

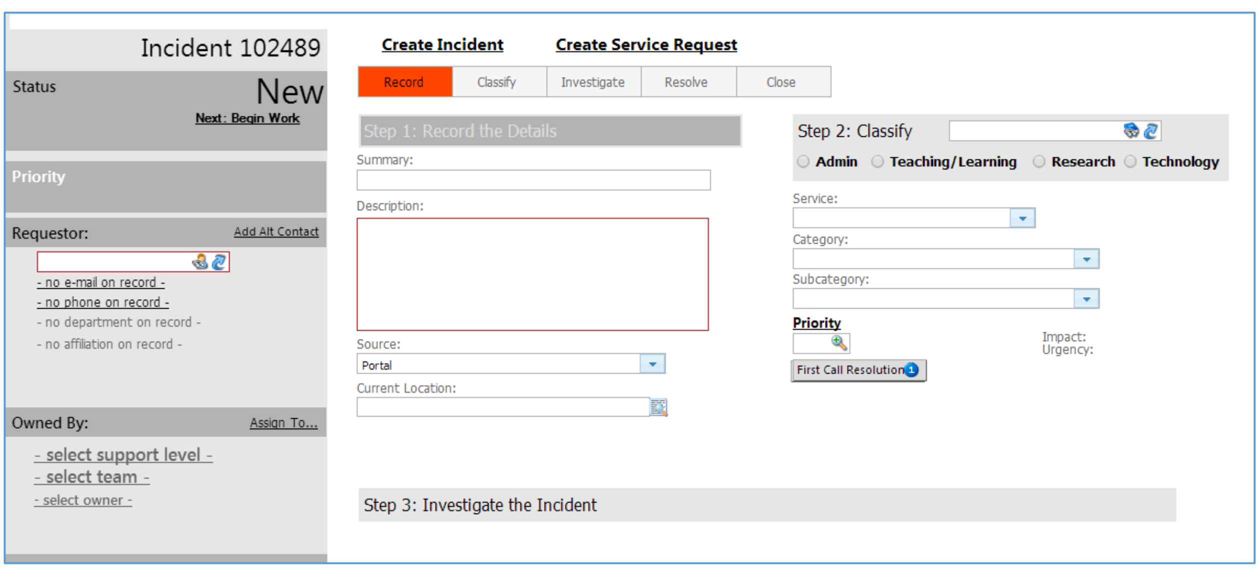
The Tool

1. **Dashboard –** The dashboard will serve as your primary interface with the system when you are not recording an incident/request. From the dashboard you can see many things about your workload and the workload of you team.

From within the dashboard you can create an incident or service request by selecting the links at the top of the page. Let's create a new ticket.



2. **Create a Record: Incident/Request** – RECORD
    a. **Overview –** Upon opening a new incident or service request you are presented with the new record screen. The incident is given a number for identification purposes but all of the other fields are left for you to fill in. As you can see, from within the "record an incident" screen you can create a Service Request or a new incident by clicking the links at the top of the page, much like within the dashboard. Just below those links you can see the process status or progress bar. As indicated here, we are in the record step of the process. In the course of a real event we would have already detected the incident via the means by which UFIT was notified of the incident. We will also record the detection source in Step 1.



b. **Requestor** – Before you can begin working through the steps in creating a new incident you must first fill out the Requestor fields. Remember the Record step in the process, well this is where that begins. You can search for the requestor by clicking this icon  in the field provided. The customer menu opens and you can search for the requestor here to populate the field. If the requestor is not listed in the customer menu then you can input a new requestor by clicking the "NEW" button. A menu appears where you can input the new customer. Please provide as much information as you have in this screen.
   i. If there is a need you can input an alternate contact for the requestor as well. This will be useful when the requestor is not able to be in contact with UFIT for whatever reason but is utilizing a colleague to fulfill his/her incident/request. You can do this by clicking the Add Alt Contact link in the top right of the Requestor section.

c. **Step 1** – This is an extension of the Record portion of the process.
   i. To begin step 1 you will need a brief summary of what the incident is all about. Make the summary as concise as possible so that others can determine the main purpose in this event in just a few words.
   ii. Next is the description field. In the description field you need to provide as much detail as possible about the incident. The information entered here will potentially be used by others to resolve so try to use language that is widely understood and give as much information about the account as relevant.
   iii. DETECT In the source field you will use the dropdown menu to select the method of contact used by the requestor. This is where the record of detection is recorded. The dropdown menu contains the following options: Telephone, Walk in, E-mail, Portal, Chat Session, Inquiry, Social Media, & Event. Choose the most relevant.
   iv. University Zone gives you various areas around campus to select from. You should select the location that is closest to the location of the request or incident. If that area is not listed, then select "Other."
   v. The Current Location field is to be filled out with the location of the requestor. If you cannot find your location, please select the "Other" drop down option.

d. **Step 2** – CLASSIFY. This is where we implement the classify portion of the process.
   i. You must first classify the incident/request as it pertains to the service portfolio. The options are Admin, Teaching Learning, Research, & Technology. If you select the service portfolio icon  the service portfolio menu opens with each offering and its subset. Choose the option that best describes the category of the incident. If you choose to classify using the service portfolio menu the Service, Category, & Subcategory fields are populated for you. If you choose to classify each step individually remember that the classification standards are hierarchal. What this means is that the dropdown menu options will change based on each previous selection in Step 2. Each subsequent field options are dependent upon the previous field submissions.

ii. The second field in Step 2 is Service. Here you will indicate from the dropdown menu what service this incident/request falls under. The dropdown menu items are dependent upon the Service Portfolio classification.
iii. The third field in step 2 is the category. Again you will select from the dropdown menu to select the appropriate category and the selections will be dependent upon the Service classification.
iv. Next is Subcategory. This dropdown will be dependent upon the Category field above and the options will change accordingly.
v. Priority is a very crucial step in the classification process. Your selection of a priority will determine which SLA timetable this incident will fall under. We will discuss that a little deeper later. What you need to know is how to determine the priority of the incident. Let's look at some examples of different priority level incidents and how the priority classification will determine the time standard for resolution

e. **Step 3** – INVESTIGATE/FULFILL

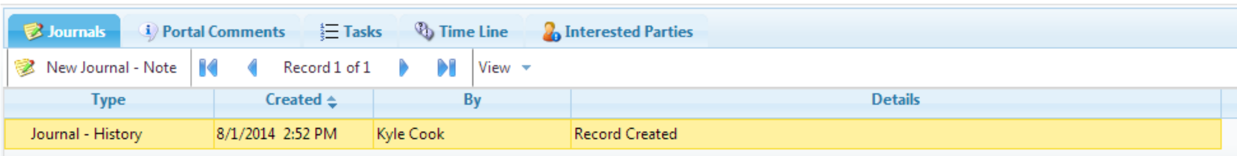
This step of form is also where the Investigate/Fulfill element of the process begins. Now that we've detected, recorded, & classified the incident it is time to investigate. If this were a service request the heading would say Fulfill the Request. The fields in this step will vary depending on classification. Forms that revolve around specific areas of incident or request are populated here based on classification and the owner of this even should complete the forms accordingly.

f. **Ownership** (left menu) – The Owned By: section on the left menu is where you will designate who will actually be working the incident or request. You must first select a support level, then a team that falls under that support level, and finally an individual owner. This designation can be changed at any time and you will need to rely on team specific guidance to determine how these selections can best be defined. You can review the Tiers & Teams here.
g. **Lower menu –** At the bottom of the incident/request record screen there is a tabbed banner that has a few options for you to better investigate and incident or fulfill a request.
    i. Journals are where you should document the events that have transpired in your time working on the incident or request. Everyone who is able to access this screen will be able to read the notes listed here.
    ii. Portal Comments are comments that have either come from the customer in the myIT Portal or they are responses sent from UFIT representatives to the customer via the myIT Portal. Remember that the customer can see the comments listed here so be certain that you are using appropriate customer service oriented writing here.
    iii. The Tasks tab will be used primarily with requests but not exclusively. This is a list that can be created by the owner, introduced by a manager to be given to the event owner, or a task list that populates due to the classification of the

request. The tasks associated under the tasks tab will need to be fulfilled in order to close the event.

iv. The Time Line gives you information about the event. Such as when it was created, assigned, responses, duration, customer inquiry, reassignments, reclassifications, number of touches, and the time and date of closing the event.

v. Interested Parties allow you to enter the name and email of anyone who might be interested in the status changes of the ticket you are working. The email address listed here will receive updates each time the status of that specific ticket changes.



h. **Good to know/Best Practices –** The myIT tool is very rich with features and we did not come close to covering them all in this module. We do need to go over some best practices and good to know features provided.

i. First Call Resolution **–** Use this button when the incident or request was resolved from the first contact with UFIT. This will close the event and label it as First Call Resolution.

ii. In the I Want To section has several useful features. Cloning a ticket will pull all the properties of one event on to the new one you're creating so that you don't have to fill out information that is essentially a duplicate of a previous ticket. Take Ownership will assign this event to you. Close as Duplicate will close the event if it is a duplicate of another event already submitted. This will be helpful in incidents or requests effecting multiple people at a single source. You can also link this event to an existing Major Incident, if appropriate.

3. Resolve & Close – Once the incident or request has been resolved you must indicate that in the myIT Tool by selecting the Next: Resolve link in the Status section of the record screen. When you click this link a pop up menu is displayed where you can enter the resolution description. Enter as much information as relevant to the event.

a. After describing the resolution you must select a Cause Code. From a dropdown menu you can select: Duplicate, Hardware Malfunction, Outage, Permissions, Request, Resolved from Problem, Self-Healing Event, Software Malfunction, and Untrained User.

b. Once the resolution description and Cause Code are entered the links in the Status window give you two options. One to reopen the event or the second to close the event. We will close the event by clicking the Close this Incident link. Then the status turns to "Closed" and we can move on to the next event.

Conclusion

I hope you've enjoyed this overview of the myIT Service Management Tool. We've covered the process for Incident and Request management as well as how that process is realized within the myIT Tool. A first time user could find this all a bit overwhelming at first, but after some hands on use the myIT tool becomes very intuitive and capable of performing its required task.

Please remember the Customer Centric View.

Ultimately, this one tool combined with the one process with allow UFIT to achieve the one customer view. Furthering the mission to provide exceptional customer service to the Gator Nation.