



Rapid Start

Reference Guide

Version 9.8.1

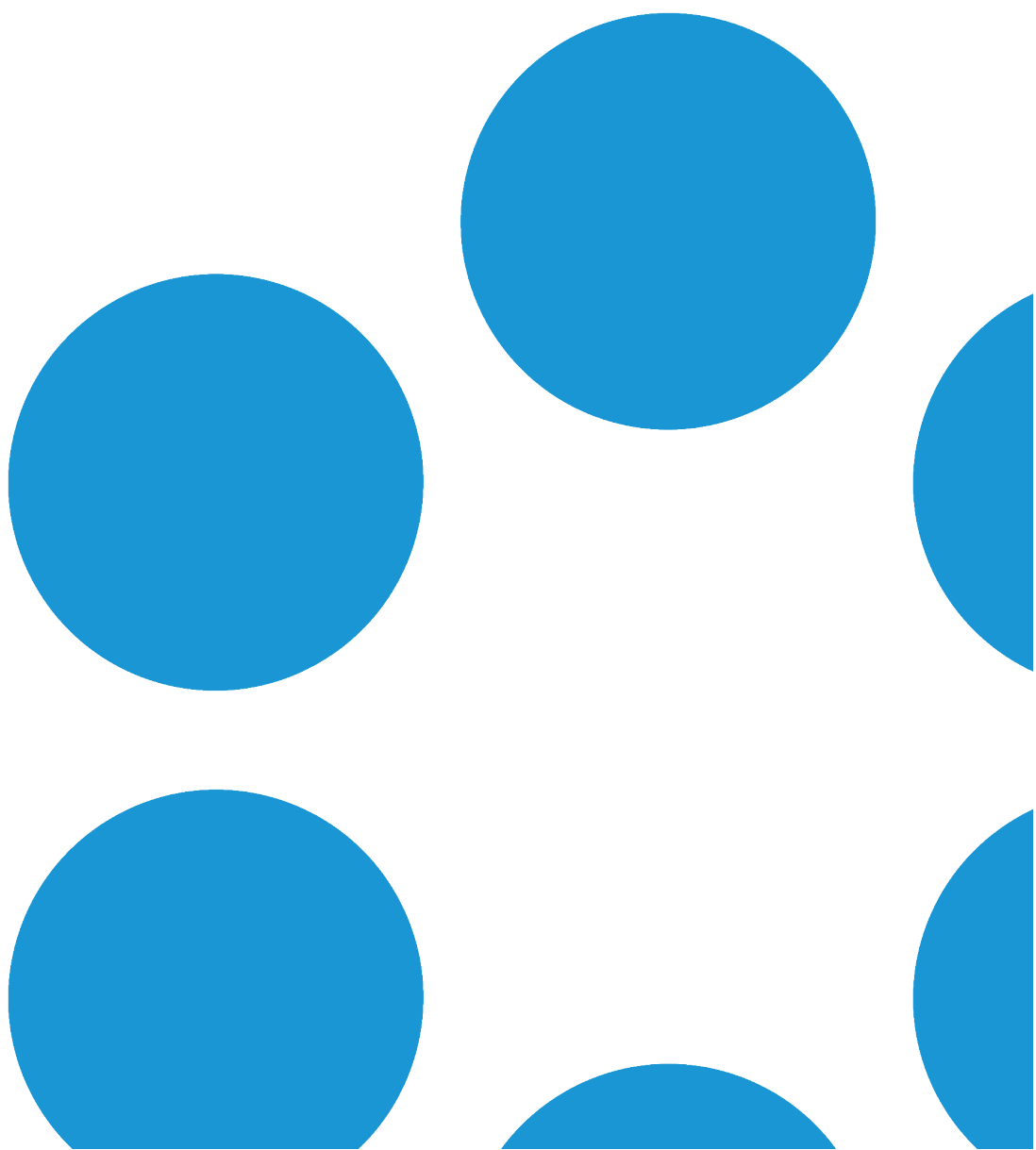




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Rapid Start Reference Guide Version Details

Version No	Date updated	Notes
1.0	10 November 2015	Initial draft of this document.
1.1	19 November 2015	Revisions to the Testing workflow diagrams
1.4	9 March 2016	Minor Updates to System Setting defaults
1.5	8 April 2016	Updates following RSv1.5 Release
9.4.0	20 May 2016	Updates following RS v9.4.0 Release
9.5.0	15 July 2016	Updates following RS v9.5.0 Release
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9.7.3	13 March 2017	Updates following RS v9.7.3 Release
9.7.4	21 March 2017	Updates following RS v9.7.4 Release
9.8.1	15 June 2017	Updates following RS v9.8.1 Release



About this Documentation

Purpose

This document describes the preconfigured ITIL aligned Rapid Start installation of vFire. It is important to be familiar with the pre-configured settings and the assumptions that underpin them, in order to fully benefit from the system.

Whilst many of the values and settings required by an ITIL aligned system have been created and configured in Rapid Start, certain configurations must be adjusted prior to going live. This document details those configurations.

Assumptions

This document assumes the following:

- A Single Partition for use by an IT Department, additional Partitions can still be configured and it is recommended that these discussions are held early in the implementation project.
- The Self Service Portal interface will be used for users logging service requests.
- The IT department is familiar with ITIL and its concepts
- Release Management workflows assume you wish to take advantage of CMDB update automation tasks and integration with third party tools.



Introducing Rapid Start

What does Rapid Start give me?

vFire Rapid Start delivers a set of preconfigured data and configurations that enables you to get started with the key processes that you need to move from Service Transition to Service Operation. This includes:

- Service Operation
 - Incident Management (including Major Incidents)
 - Problem Management
 - Request Fulfilment
 - Event Management
- Service Transition
 - Service Asset and Configuration Management
 - Change Management
 - Release and Deployment Management

The data and configurations that are provided for the above include:

- Processes (workflow templates) and tasks
- Screen sets
- Categories, statuses and closure codes
- Priorities, Impacts and Urgencies
- Service Level Agreements for calls and requests
- Services and Service Actions (with images), providing a pre-populated Catalog
- Systems within CMDB, to support the above services
- Groups for calls and requests
- Analyst template





A full list is provided in [page 45](#).



What will I need to do to get up and running?

vFire Rapid Start provides typical data that any organization might need. You will need to add your own specific data and processes, by performing the listed activities, and taking some of the listed next steps, where they are relevant to your operation.

In each section of this document, you will find this information under:

	Configuration Activities
	Recommended Steps
	Suggested Next Steps
	User Acceptance Testing

How do I get Rapid Start?

vFire Rapid Start is one of two databases that are shipped with vFire. The standard blank database is created when you install the system through the Server Console “New System Wizard”; Rapid Start can be obtained directly from Alemba. After you have attached the database to MS SQL Server, you simply point your vFire system to it using the Server Console, and you are ready to go.

- Install vFire Core to MS Windows Web Server
- Setup Blank vFire Core System using New System Wizard
- Connect to a Blank MS SQL Server Database
- Restore Rapid Start Database over the Blank MS SQL Server Database
- Update the vFire Core License Key through Server Console



For the Rapid Start Installation Guide please consult the [Rapid Start Install Guide](#)



For Server Prerequisites please consult <http://alemba.help/help>



Rapid Start only ships with a 6 Month Temporary License Key and should be replaced with the Customer License Key at the earliest opportunity.



Supported Databases



MS SQL Server is required for Rapid Start

Database Platform	Supportability
MS SQL Server 2005/2008/2008 R2	Not Supported
MS SQL Server 2012	Supported
MS SQL Server 2014	Supported
MS SQL Server 2016	Supported



vFire Software Compatibility

Rapid Start	vFire Core Version	vFire Officer Version
1.0	9.2.2	5.5 & 5.6
1.3	9.2.3	5.7 & 5.8
1.4	9.2.3	5.7 & 5.8
1.5	9.3.0	9.3.0
9.4.0	9.4.2.2	9.4.0.2
9.5.0	9.5.0.121	9.5.0.4
9.5.2	9.5.2.2	9.5.1.3
9.6.2	9.6.2.6	No longer shipped with Rapid Start
9.7.3	9.7.3.580	No longer shipped with Rapid Start
9.7.4	9.7.4.589	No longer shipped with Rapid Start
9.8.1	9.8.1.314	No longer shipped with Rapid Start



Service Operations

Request Fulfilment Process

Request Fulfilment is the process responsible for managing the lifecycle of all service requests from the user.

Service Catalog

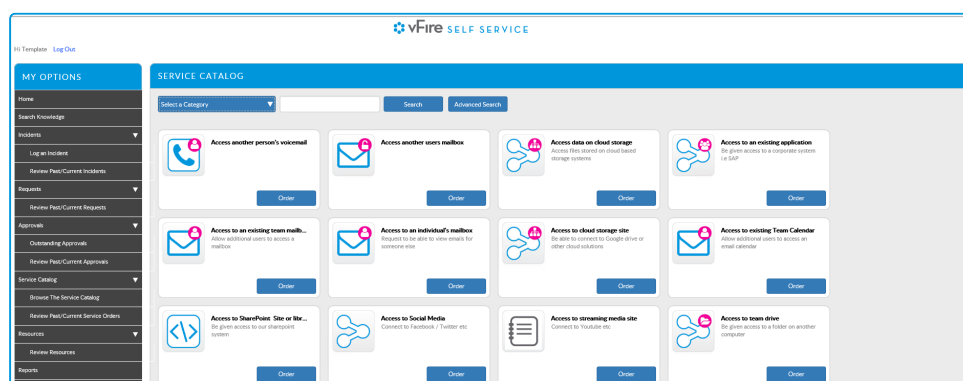
The vFire Service Catalog allows users to request and manage requests and IT services through a single interface, the vFire Self Service Portal, these are called Service Actions.

The Rapid Start Service Catalog contains a library of over 100 out of the box Service Actions and has been enhanced with the introduction of specific screens per entry, this allows for targeted and user friendly questions to be asked based on the type of Service Action entry being selected by users. Each Catalog entry has a dedicated Self Service Submission and Review screen, whilst within Core the collected information is visible through both Request Details and Task Details screens.

This enhancement means the Service Catalog can now be easily deployed as part of the Rapid Start process with minimal additional changes and with entries that are likely to cover most customer's needs.

Additional details can be found in [page 45](#).

The Service Catalog presents Users with a friendly interface containing a graphic, description and Catalog information to order/request the items, which in turn then drive a specific Service Request or Workflow to be automated.





Service Type	Service
Technology Services	Email and Messaging
	Telephony and Mobile Communications Support
	PC services
	Ordering – Software, PC, Printer and Mobile Devices
	Printing and Copying
	Video conferencing and projectors
	Access and User Permissions
Enterprise Services	Intranet Content Management
Professional Services	Consulting and Training
Service not listed	Service not listed

These are Business Services, which are offered to users. Two other services classes have also been defined for potential future use:

- **Customer Service** - offered direct to users (not to users)
- **ICT Service** - offered between IT departments.

vFire allows access to Service Actions to be restricted to specific users (using subscriber groups or CMDB Stakeholder Roles and can be configured using the MS AD integration). In the Rapid Start system, Service Actions within the Service Catalog have been made available to all users by default and visibility of these items can easily be restricted.



Service Requests

An additional IPK Call Status of Service Request is available to log User Requests that do not have specific Service Actions so that these calls can be differentiated from an Incident as outlined in the Incident Management section.

Before you start

The following activities should be undertaken prior to going live with vFire Rapid Start.

- Review all Services and Service Actions. Update, clone and delete as required.
- If user access restrictions are required for Service Actions, create the relevant subscriber groups and link them to the Service Action. If you wish to manage access via Active Directory integration please consult the vFire Active Directory Integration User Guide
- Define the Services within the Enterprise Services type (generally your corporation wide application services) and create appropriate Services and Service Actions. This can be an involved process. This process is often managed as a project in its own right. Consider including Enterprise Services as part of a phased implementation approach.
- Review Call Types for Service Requests.

Next Steps - Enhancing your implementation

- Set an implementation review date three months after release. Use this opportunity to improve existing requests, create new requests and identify areas of success and areas of concern. Report on the use of the 'Service not listed' service action and update the Service Catalog as appropriate.
- Consider what Service Actions might be suitable for Service Bundles.
- Review reporting requirements around Request Fulfilment and ensure the correct data is being captured and that appropriate reporting templates are available.

Workflow Management

While the vFire Self Service Portal provides the user interface into IT services, it is Workflow Management that automates the fulfilment process, including approvals and CMDB updates.



Service Actions within Rapid Start are linked to a single workflow template within Workflow Management. This is a simple default template called 'Basic Service Action Fulfilment'. It contains one task forwarded to the Service Desk group for action. The parent Request will also sit in the Service Desk Workflow Group queue.

A vFire screen set has been created for this request called 'Service Request Fulfilment'. The screen set has been customized through the addition of Service and Service Action details. Service order details are then readily visible to the Analyst on both the request and the task/approval.

A message template is used to send an email to an Analyst when a task has been assigned to them. In Rapid Start, a custom template has been linked to the Service Request Fulfilment screen set, and will be used whenever a Service Request Fulfilment Task is activated. This template contains service order details, including the fields Order No, Ordered Service, Ordered Service Action and Ordered Service Bundle.



The following activities should be undertaken

- Add Analysts to the Service Desk Workflow Group.



Next Steps - Enhancing your implementation

- Gather user requirements and creating workflows for each Service Action to deliver the greatest automation efficiencies.
- Considerable value is realized in automating the new starter requests, staff exit requests and hardware/software ordering requests. However, these processes are also the hardest to define and most complex to implement. Defining the processes behind these high value requests is often managed as a project in its own right. Consider including these requests at a later date as part of a phased implementation approach. You should take full advantage of vFire's advanced logic functions and third party integrations within Workflow Management to ensure the success of automating these processes.
- Create Service Request Dashboards for relevant team members to track Request Fulfilment in real time.
- Review reporting requirements around Request Fulfilment and ensure the correct data is being captured and that appropriate reporting templates are available.



Service Level Agreements

Three Service Level Agreements (SLAs) have been defined within Rapid Start. These sit within the Workflow Process, Service Request Fulfilment. They track resolution time and provide one escalation alert.

The relevant agreement is applied to the request based on the service level defined within the linked Service Action.

The following table outlines the SLA configuration:

Agreement Name	Selection Criteria	Resolve Escalation alert factor	Resolve Breach
PLATINUM Service Request Fulfilment SLA	Service Action service level: Platinum	80% of resolve breach time	8 working hours
GOLD Service Request Fulfilment SLA	Service Action service level: Gold	90% of resolve breach time	16 working hours
SILVER Service Request Fulfilment SLA	Service Action service level: Silver	95% of resolve breach time	40 working hours
Title: BRONZE Service Request Fulfilment SLA	Service Action service level: Bronze	95% of resolve breach time	80 working hours

All Service Actions within Rapid Start have a Silver service level defined; therefore, only the SILVER Service Request Fulfilment SLA will be selected. Other SLAs have been defined so as to be available for future use.

Working hours have been defined as Monday to Friday, 9am till 5pm.



The ability to set user expectations through the use of the Service Catalog portal interface is of significant value. Therefore the Turn Around Time field in the Service Action's Description field have been populated with "40 hours (five working days)". This is based on the Silver SLA resolve breach time and the defined working hours.



The following activities should be undertaken

- Review the SLA structure and change if required.
- Review the Working Hours settings and change if required. Add any holidays.
- Remember to update the Service Action 'Turn Around Time' if this is impacted by any changes.
- Notifications and Escalations will need to be configured to go to the correct groups/analysts.



Next Steps - Enhancing your implementation

- Create Service Request Dashboards for relevant team members to track Request Fulfilment SLA compliance in real time.
- Review reporting requirements around SLA compliance for Request Fulfilment, and ensure the correct data is being captured and appropriate reporting templates are available.

Incident, Problem, Known Error Management Processes

The purpose of Incident Management is to restore normal service operation as quickly as possible and minimize the adverse impact on business operations, thus ensuring that agreed levels of service quality are maintained.

The purpose of Problem Management is to manage the lifecycle of all Problems from first investigation through further investigation, documentation and eventual removal. Problem Management seeks to minimize the adverse impacts of incident and problems on the business that are caused by underlying errors in the infrastructure and to proactively prevent the recurrence of incidents related to these errors.

Incident Lifecycle

Within the Incident lifecycle there are Incidents, Major Incidents, Problems and Known Errors. These elements work together to ensure unexpected losses of service are restored as quickly as possible, and to limit their recurrence.



Within Incident Management there are two types of Incidents – those related to service loss or impairment as experienced by the user, and those related to internal IT faults that do not directly impact users (such as a drive failure in a RAID array).

It is important to distinguish between these two types of Incident when reporting to Business of the success of IT delivering reliable service, to enable this extra call status switch on the IPK Status in the IPK Default Stream.

The following screen sets have been created to reflect the Incident lifecycle:

- Incident
- Major Incident
- Problem
- Known Error

Categorization - Call Type

The following call types have been provided in Rapid Start. These call types are applicable across all screens sets.

- Performance degradation
- Loss of Service
- Not functioning as expected
- Error report investigation
- Component failure
- Other



The 'Other' category should be reviewed regularly to capture types that have not already been defined. Missing types can then be identified and added and the 'Other' category removed.

Priority Matrix

The following propriety matrix has been defined in Rapid Start.



Urgency/ Impact	Immediate	Days	Weeks	Long Term
Individual	High	Medium	Low	Low
Team	High	High	Medium	Low
Department	Critical	High	High	Medium
Organization	Critical	Critical	High	High

Closure Codes

On closure of a call the following closure codes have been defined:

- Resolved – Workaround Provided
- Training Provided
- Fix Applied
- Documentation Review
- Service resumed – cause unknown
- Process failure/not followed
- 3rd Party System issue
- Resolved – RFC Applied
- Resolved – workaround found, KE created
- Unresolved – Too costly
- Unresolved – Unable to reproduce

Analyst Management

The following IPK Analyst Groups have been defined.

- Service Desk
- Problem Management Team



- Major Incident Response Team
- IT Operations
- Applications Management Group 1
- Applications Management Group 2
- Technical Management Group 1
- Technical Management Group 2



The following activities should be undertaken

- Review the values defined and make changes as appropriate.
- Add Analysts to the Service Desk group.
- Add Analysts to the other groups as required.
- Rename the Applications Management and Technical Management Groups to match your structure.



Next Steps - Enhancing your implementation

- Take advantage of the Proactive Analysis function in vFire to automatically detect and log Problems for investigation.
- Use IPK Workflow rules to enhance automation of call routing and handling.
- Create Incident Dashboards for relevant team members to track Incident activity in real time.
- Review reporting requirements around Incident Management and ensure the correct data is being captured and that appropriate reporting templates are available.

Service Level Agreements

Five Service Level Agreements (SLAs) have been defined within Rapid Start. They track resolution time and provide one escalation alert for Incidents, and Major Incidents.

No SLAs are defined for Service Requests, ICT Incidents, Problem or Known Errors. SLAs are agreements with the user. ICT Incidents, Problems and Known Errors are not user facing



processes and as such do not have SLAs (although these can be defined within vFire as an internal aid for tracking resolution times). Service Request SLAs can be added but are not defined within Rapid Start due to their User specific nature.

The relevant agreement is applied to the Incident or Major Incident based on the service level of the Service Action defined within the call.



The service level of all Service Actions on the Rapid Start system is set to Silver.

The following table outlines the SLA configuration for Service Incidents:



Agreement Name	Selection Criteria	Resolve Escalation alert factor	Resolve Breach (working hours)
PLATINUM Incident Resolution SLA	Service Action Service Level = PLATINUM.	80% of resolve breach time	Critical: 6
			High: 10
			Medium: 16
			Low: 32
GOLD Incident Resolution SLA	Service Action Service Level = GOLD.	80% of resolve breach time	Critical: 8
			High: 24
			Medium: 32
			Low: 40
SILVER Incident Resolution SLA	Service Action Service Level = SILVER.	80% of resolve breach time	Critical: 12
			High: 32
			Medium: 40
			Low: 80
BRONZE Incident Resolution SLA	Service Action Service Level = BRONZE.	80% of resolve breach time	Critical: 24
			High: 96
			Medium: 120
			Low: 160



The following table outlines the SLA configuration for Major Incidents:

Agreement Name	Selection Criteria	Resolve Escalation alert factor	Resolve Breach (working hours)
Major Incident Resolution SLA	IPK Status = Major Incident	80%	Critical: 6
		90%	High: 12
		95%	Medium: 18
		98%	Low: 24

Working hours have been defined as Monday to Friday, 9am till 5pm.



The following activities should be undertaken

- Review the SLA structure and change if required.
- Review the Working Hours settings and change if required. Add any holidays.



Next Steps - Enhancing your implementation

- Create Incident and Major Incident SLA Dashboards for relevant team members to track SLA compliance in real time.
- Review reporting requirements around SLA compliance for Incident Management and ensure the correct data is being captured and that appropriate reporting templates are available.



Service Transition

Service Asset and Configuration Management Process

The purpose of Service Asset and Configuration Management is to ensure that the assets required to deliver services are properly controlled, and that accurate and reliable information about those assets is available when and where it is needed.

CMDB Logical System Layer

Beneath the Service Catalog and before the layer of the CMDB containing physical Configuration Items (CIs) sits the logical system layer. This is how IT technicians can refer to the infrastructure in the abstract, i.e. email is down. This abstraction refers to the complex network of CIs underpinning that system.

Systems are often confused with services. While there is a relationship between the two, they are not the same. A service is a productivity enabling IT offering from the user perspective; a system is a complex collection of physical CIs from the IT perspective.

Systems are defined with the 'Structure' CMDB Item Type in vFire.

The following systems have been defined:

- Storage
- Enterprise Data Warehouse
- VPN
- Corporate Application 1 (placeholder record)
- Internet
- Intranet
- PABX/IP Telephony
- Email
- Print Servers

The system layer has relationships defined with Services in the Service Catalog. The CMDB Link Type has been defined as a peer-to-peer link labelled 'Service to Logical System'. The Service is part A of the link, and the System part B.



Service	Linked Systems
Email and Messaging	Storage, Email
Telephony and Mobile Communications Support	PABX/IP Telephony
PC services	Storage
Ordering – Software, PC, Printer and Mobile Devices	
Printing and Copying	Print Servers
Video conferencing and projectors	
Access and User Permissions	VPN, Intranet, Internet, Corporate Application 1, Data Warehouse, Print Servers
Intranet Content Management	Intranet
Consulting and Training	

System screens have been edited to hide User name, room and floor, model, manufacturer and serial, as these are not relevant to logical systems.

Release and Deployment & Change Management Processes

Four workflow templates are provided in Rapid Start as a starting point for defining change, release and deployment processes. The Service Transition processes of Change Management and Release and Deployment Management are divided into four workflow templates as detailed below, to make management of this complex process easier.

Change Management:

- Change initiation



Release and Deployment Management:

- Build
- Testing
- Operations (Live)

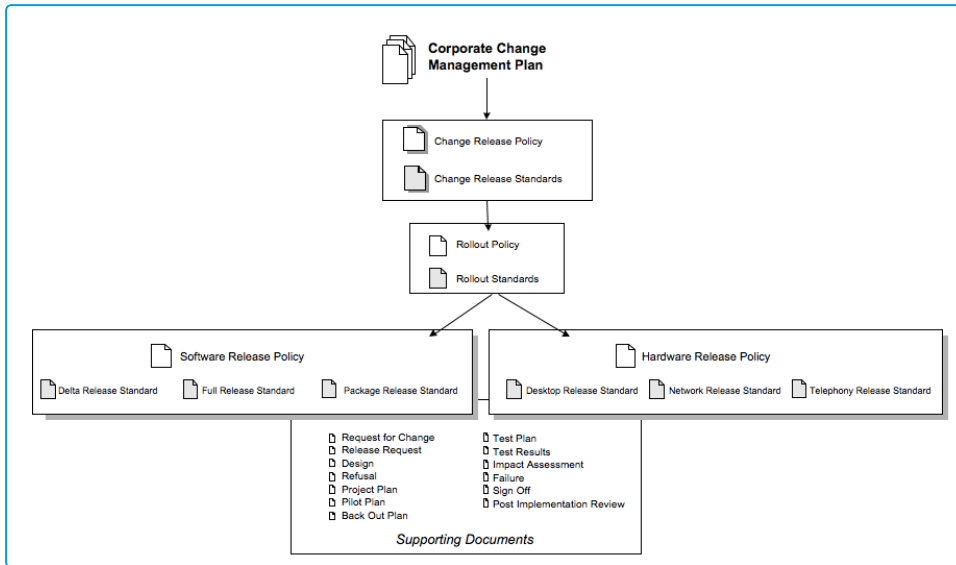
The workflow of the template can be viewed graphically within vFire via the Dependency Diagram. The arrangement and look of icons will differ from standard process diagrams. Certain steps and pathways may also appear to have been omitted. This is a result of advanced workflow rules being employed to improve the efficiency of the process.

To clarify the workflow, a standard process diagram is provided in this document for each workflow template (see Appendix B). Each task within the workflow is then detailed within the subsequent table. The same detail is also provided within the description fields of the tasks and requests within vFire.

Documentation

Release and Deployment Management requires extensive documentation throughout the release lifecycle: the higher the risk and importance of the change, the greater the requirement for supporting documentation.

The following diagram illustrates policies and standards that need to be in place, and the supporting documents that may be generated as a result of a release. The workflow templates reference these documents. Please note, the actual document templates are not provided. Examples of many of these documents can be found in the ITIL books.



Merging multiple templates into one

Once each template has been adjusted to meet organizational requirements, they can be merged to form a single release management template (using the Apply Template function on vFire). Each phase template is not complete in itself as phases rely on, or have outputs to, other phases.

Change Management Process

The purpose of the Change Management process is to control the lifecycle of all changes, enabling beneficial changes to be made with minimum disruption to IT services.

Workflow Management

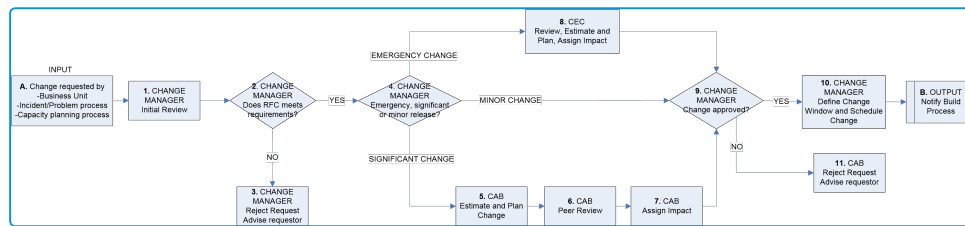
The Change Management process uses the Change Initiation workflow template within vFire Rapid Start.

The Change Initiation template controls the commencement of the Request For Change process leading into a Release Management process (sometimes referred to as Demand Management).

A Release Management change request can be an input from a Business Unit, the Incident/Problem Management process or the Capacity Planning process.



Once complete and approved, the Change Initiation workflow leads into the Build workflow under the Release and Deployment Management process.



(For more detail on the process diagram see [page 65](#))



The following activities should be undertaken

- Test templates before their release to ensure that the template behaves as predicted. Look for opportunities to use conditional branching and activation scores to improve the efficiency of the workflow.
- Within the Change Initiation workflow there is a task that requests the Change Manager to schedule the change by specifying a Change Calendar and Change window. Ensure those Analysts in the Change Manager role have create, edit and delete change window permissions.
- Add Analysts to the following Workflow groups:
 - Change Advisory Board Member
 - Change Emergency Committee Member
 - Change Manager
 - Release Manager

Service Level Agreements

Three Service Level Agreements (SLAs) have been defined within Rapid Start. These sit within the Workflow Process, Change Management. They track resolution time and provide one escalation alert.

The relevant agreement is applied to the Change Initiation request based on request priority.

The following table outlines the SLA configuration:



Agreement Name	Selection Criteria	Resolve Escalation alert factor	Resolve Breach	Notification goes to:
EMERGENCY Change Initiation SLA	Request Priority: Emergency	80% of resolve breach time	8 working hours	Workflow Group: Change Manager
SIGNIFICANT Change Initiation SLA	Request Priority: Significant	80% of resolve breach time	40 working hours	Workflow Group: Change Manager
MINOR Change Initiation SLA	Request Priority: Minor	90% of resolve breach time	80 working hours	Workflow Group: Change Manager

Working hours have been defined as Monday to Friday, 9am till 5pm.

Notifications for a resolve breach and a first level resolve escalation alert will be sent to members of the Workflow Group, Change Manager, via email.



The following activities should be undertaken

- Review the SLA structure and change if required.
- Review the Working Hours settings and change if required. Add any holidays.



Next Steps - Enhancing your implementation

- Create Change Initiation SLA Dashboards for relevant team members to track Change Management compliance in real time.
- Review reporting requirements around SLA compliance for Change Management and ensure the correct data is being captured and that appropriate reporting templates are available.



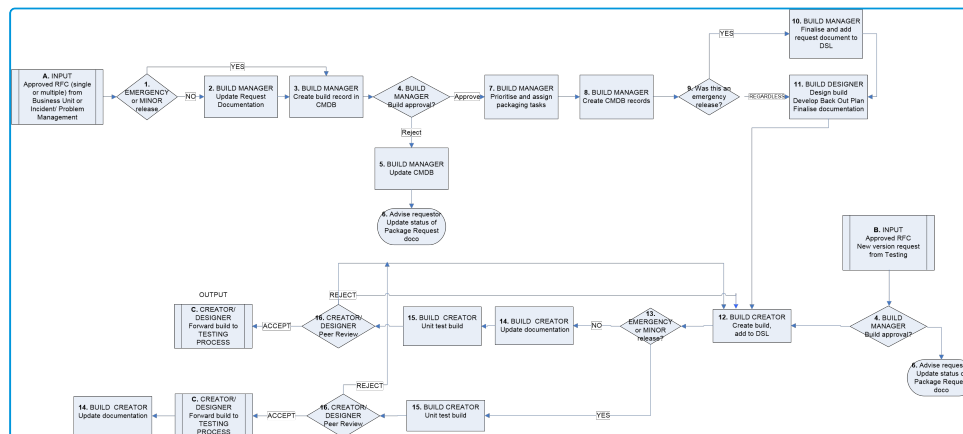
Release and Deployment Management Process

The purpose of the Release and Deployment Management process is to plan, schedule and control the build, test and deployment of releases and to deliver new functionality required by the business while protecting the integrity of existing services.

Workflow Management - Build

The Build template controls the building of a release build prior to testing.

The request to create a build comes from the approved Release Management RFC, and can include more than one request. Alternatively, the process can be initiated when the build is returned from testing, where testing has requested a build content change. This process leads into the Testing process.



(For more detail on the process diagram see [page 71](#).)



The following activities should be undertaken

- Test templates before their release to ensure that the template behaves as predicted.



Look for opportunities to use conditional branching and activation scores to improve the efficiency of the workflow.

- Add Analysts to the following Workflow groups:
- Build Manager Build Designer Build Creator
- For the “Create build record in CMDB”, and “Update CMDB record” Link CMDB item tasks, manually specify the CMDB item(s) that will be used for the Release.

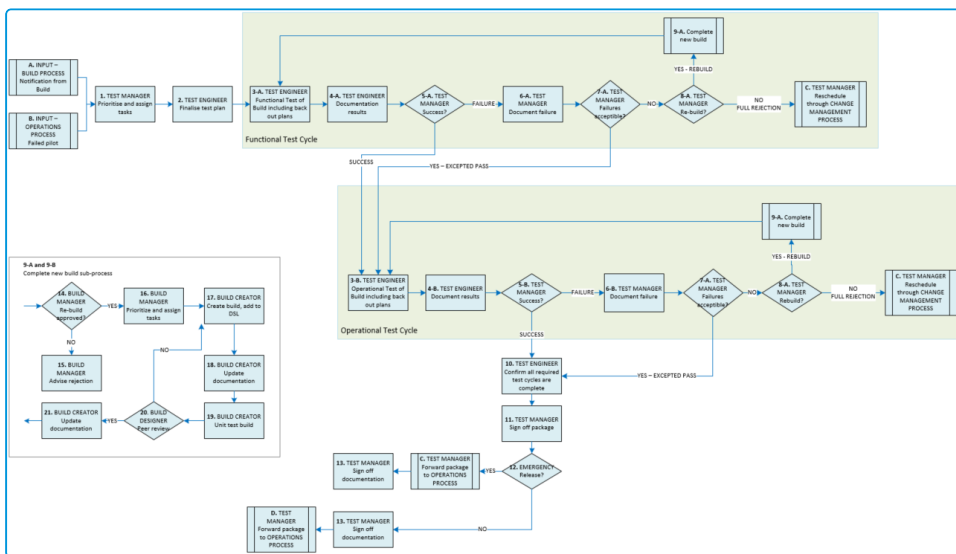


Workflow Management - Testing

The Testing template controls the testing of a release build leading into an Operations (Live) process.

Testing is initiated on notification from Build that testing is now required. It can also be initiated when a Build has been returned from Operations due to pilot failure.

This process leads into the Operations (Live) process.



(For more detail on the process diagram see [page 79](#) in [page 65](#))



The following activities should be undertaken

- Testing of templates should be undertaken before their release to ensure that the template behaves as predicted. Look for opportunities to use conditional branching and activation scores to improve the efficiency of the workflow.
- Add Analysts to the following Workflow groups:
 - Test Engineer
 - Test Manager

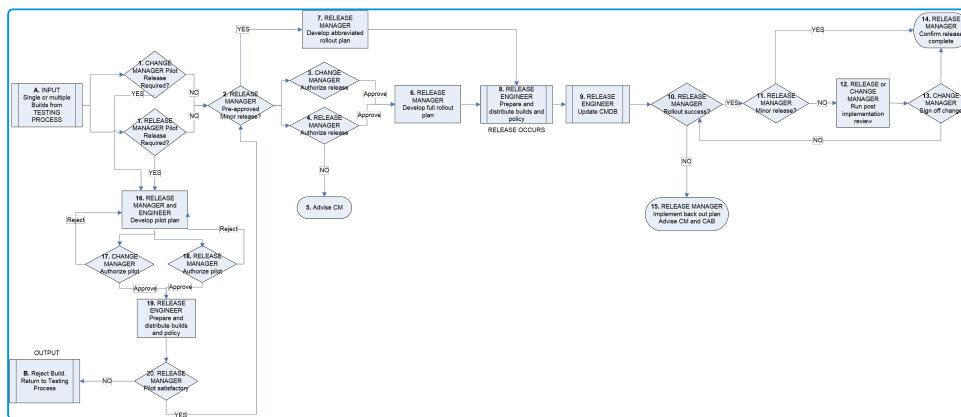


Workflow Management - Operations (Live)

The Operations template controls the release of a build after testing.

The Operations phase is initiated on notification from testing that the build is suitable for release.

Once complete there is no direct output to any other process, although incident and problem management processes are relied upon to detect failures after release.



(For more detail on the process diagram see [page 89](#) in [page 65](#).)



The following activities should be undertaken

- For the Create Request task “Pilot failed. Return to TEST” within this workflow template, the Workflow Template must manually be set to “Testing”. This field must be manually specified as it is a circular reference to a workflow template (from the Operations Release stage to the Testing Release stage), which cannot be resolved during the Workflow Template Import process.
- During the Operations (Live) stage of a release, Update CMDB tasks are used in the workflow. Appropriate Update CMDB transactions are to be configured.
- Testing of templates should be undertaken before their release to ensure that the template behaves as predicted. Look for opportunities to use conditional branching and activation scores to improve the efficiency of the workflow.
- Add Analysts to the following Workflow groups:
- Change initiation, Build, Testing, Operations (Live)



Service Level Agreements

No Service Level Agreements have been defined for the Release and Deployment Management processes. Timeframes are based on not only priority but also change windows and many other factors. SLAs for Release Management will need to be created as relevant to the release environment.



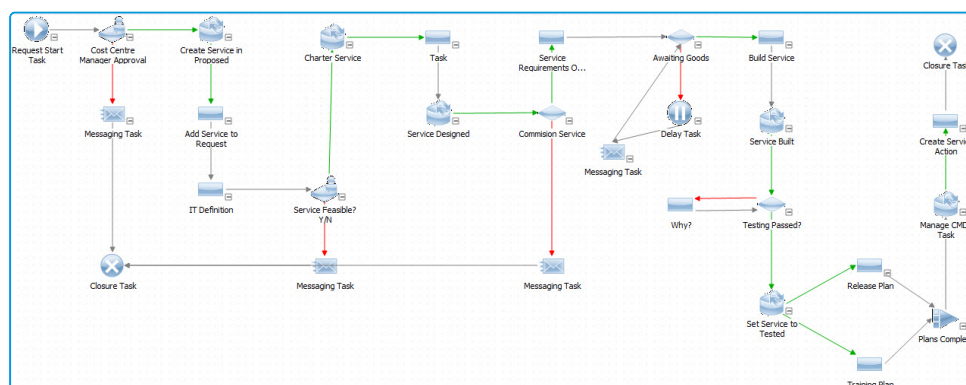
Service Portfolio Management Process

The purpose of the Service Portfolio Management processes describe an organization's service provision in terms of business value. The Service Portfolio is used to manage services across their Life Cycle, from development of new or improved services (Service Pipeline), the current services that are offered to customers (Service Catalog) to services that are no longer fit for purpose or no longer provide business value (Retried Services).

Workflow Management - Service Introduction

The Service Introduction template controls the delivery of a service through the Service Pipeline and into the Service Catalog.

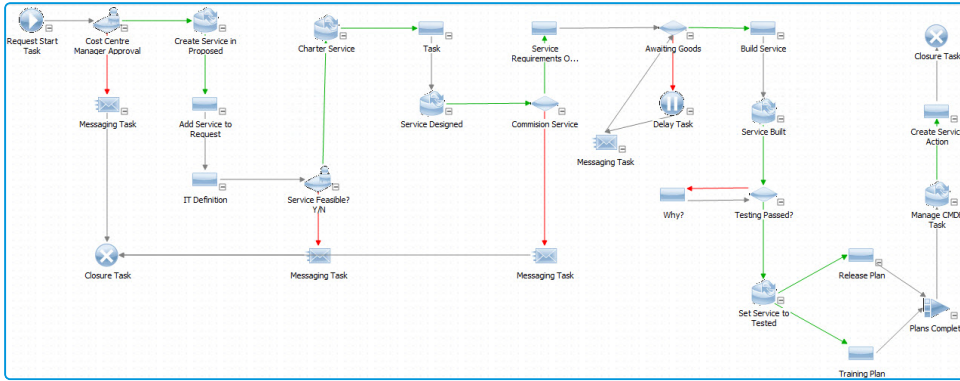
The request to introduce a new service comes from business stakeholders and runs through financial sign off and service feasibility, the process then allows requirements to be gathered and then provides the key business approval milestones for building the service, testing and release planning to ensure quality services are delivered.



Workflow Management - Service Change

The Service Change template controls changes made to a service once it is a production/live service in the Service Catalogue.

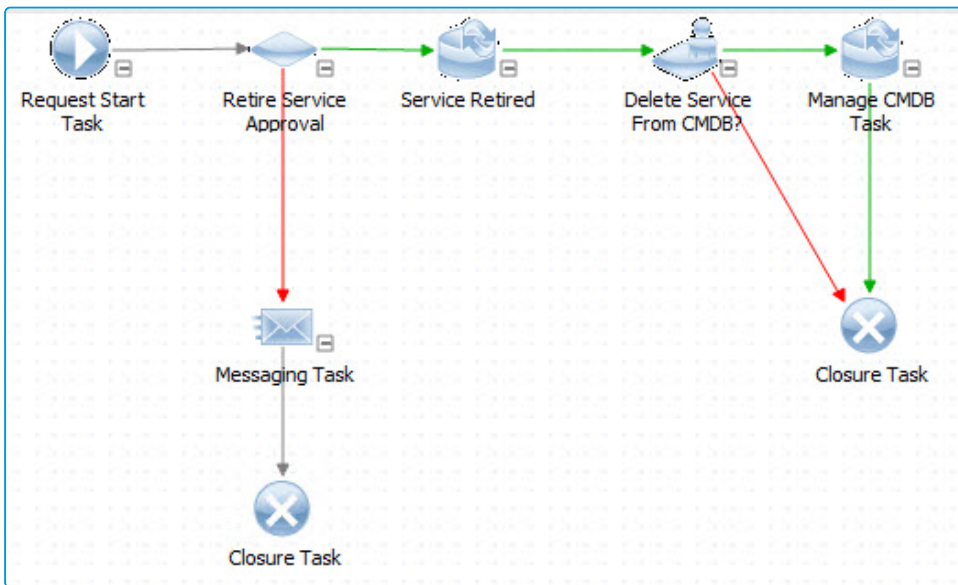
The request to change a service comes from the business and follows a similar process to the Service Introduction workflow where business and financial stakeholders have sign-off before the service is redesigned, rebuilt and then tested prior to release.



Workflow Management - Service Retirement

The Service Retirement template the removal of a Service from the Service Catalogue.

The request to remove a Service comes from the Business through the Service Owner, following approval, the Service Status is automatically changes and the Service Owner can approve the permanent removal from the CMDB.

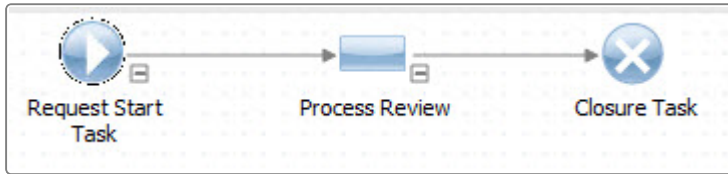


Workflow Management - Service Review

The Service Review workflow allows periodic process reviews to be scheduled.



The request to review the process is generated by the Process Owner and is typically scheduled on an annual basis.





Interface Settings

Default Analyst Settings

An Analyst in the vFire system can personalize the menus, search screens and outstanding work screens to suit their specific work requirements. These settings are saved to the database for that Analyst.

A Default Analyst has been created in Rapid Start with the following personalizations applied (see list below). This person can be cloned when creating actual Analyst records. This will apply these personalizations to the cloned record.

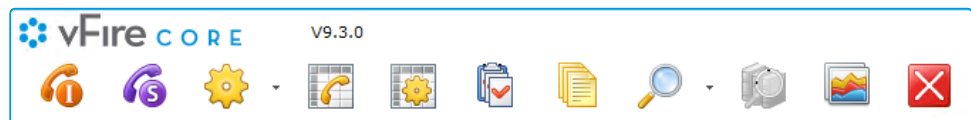
Analyst Name Template, Template

Analyst login: tt
Username

Password tt

This Analyst Account is disabled initially and will need to be activated using the main Admin account before it can be used.

Menu buttons Buttons available for Incidents. Service Requests, Calls Outstanding, Requests Outstanding, Task Outstanding, Search button has additional drop down options, including searching by Service No, Knowledge Search, Dashboards and Exit.



- Search Screens**
- Call Search: Indicator, SLA Alert, OLA Alert columns added.
 - Request Search: New Service Catalog section added to Request Search Criteria. Filters available are Service Order No, Service and Service Action. Indicator, SLA Alert columns added.
 - Task Search: Indicator, OLA Alert columns added.



Workload

Standard Columns on all views are defaulted to:

Indicators
SLA
OLA
Item Type
Item No
Customer
Description
Title
Type
Priority
Organization
Location
Physical Status
Status

**Calls
Outstanding**

Standard Columns on all views are defaulted to:

Indicators
SLA Alert Level
OLA Alert Level
Call No
Customer
Service
Configuration Item
Problem Description
Type
Call Priority
Service Action>Title
Organization
Location
Physical Status
Current Officer



**Requests
Outstanding**


Standard Columns on all views are defaulted to:


Indicators
SLA Alert Level
Request No
Customer
Title
Description
Request Manager
Type
Priority
Completion Status
Order Number
Ordered Service
Ordered Service Action
Organization
Location

**Tasks
Outstanding**

Standard Columns on all views are defaulted to:

Indicators
OLA Alert Level
Task No
Task Title
Task Description
Request No
Title
Description
Order Number
Entity Type
Task Type
Priority
Current Officer
Physical Status

 This Analyst is a default member of the Workflow Group Service Desk, and has approval permission. The Analyst is a default member of the IPK group, Service Desk. This account is disabled by default in new implementations.

-  **The following activities should be undertaken**
- You may wish to copy the Default Analyst Configs to any Analysts created through LDAP (e.g. Active Directory Connector).
 - You may wish to delete or make this Analyst inactive once you have completed your



Analyst set up

- Analyst and User Templates need to be created

The following Analyst templates have been created to be used when mapping LDAP Groups or Organizational Units:

- Service Desk Manager
- Service Desk Supervisor
- Service Desk Analyst
- IT Operations Manager
- Shift Leader
- IT Operations Analyst
- IT Operator
- Technical Manager
- Technical Analyst
- Technical Operator
- Applications Manager
- Applications Analyst
- Standard Service Desk
- Senior Manager
- Process Manager
- Process Owner
- Analyst

Technical Management teams refer to IT Teams predominantly concerned with looking after your Organizations Infrastructure such as Network, Security and Server Teams where typically you would have 1st, 2nd and 3rd Line Support functions.



Applications Management teams relate to teams that are responsible for a particular enterprise application or suite of applications such as Desktop Software, Financial Packages where it is expected that Service Desk would be able to perform the 1st Line Support Function.

The following User Templates have been created to be used when mapping LDAP Groups or Organizational Units:



- User
- User – Org Role
- User (Chat)
- User – Org (Chat)

Email Templates

User-friendly email templates and subject lines have been included in Rapid Start for Bulletin Board, Call, User Survey, Knowledge, Reports, Requests, Service Orders and Tasks.



The following activities should be undertaken

- You may wish to review the format and content of the Email Message Templates and Subject Lines.

Security Roles

Specific IPK Management Security Roles have been added for:

- Service Desk Manager
- Service Desk Supervisor
- Service Desk Analyst
- IT Operations Manager
- Shift Leader
- IT Operations Analyst
- IT Operator
- Technical Manager
- Technical Analyst
- Technical Operator
- Applications Manager
- Applications Analyst

Specific Workflow Management Security Roles have been added for:

- Change Manager
- CAB Member



- ECAB Member
- Release Manager
- Build/Implementer
- Tester

Some Generic Security Roles have also been included in Rapid Start for:

- Administrator: General Access Role Only – Allows role holder to manage the vFire Core and Self Service Application Settings.
- Analyst: Allows the role holder to use the vFire Core Application to manage calls, requests and tasks.
- Process Manager: Allows the role holder to use the vFire Core Application and perform functions that should be restricted to a more supervisory/managerial role to manage calls, requests and tasks.
- Process Owner: Allows the role holder to use the vFire Core Application and to make changes to the Process area.
- Senior Manager: IPK Management Role Only – Allows role holder to have visibility of calls without being available to be passed calls

See [page 107](#) for more details.

Integration Platform in Rapid Start

Microsoft Active Directory Connector

Rapid Start comes with a pre-configured AD Integration Source and Resource Mappings to quicken Implementation Delivery. Once any Customer specific amendments have been made, you can then easily Clone the AD Mapping for additional AD groups, containers or organizational units that you wish to map as Users or Analysts in vFire Core.

The AD Group “Users” has been mapped to import People using the Analyst template:



Mapping for Resource Type User

Source AD
Resource Type User

Group
Users

Action Fields Matching

Import

Import As Person Using template Analyst

Apply template to CMDB Item or Person
On creation only

When a resource is discovered
Create linked Entity automatically

When a resource is deleted
Delete linked Entity automatically

When a deleted resource is restored
Restore linked Entity automatically

The following vFire Core Person Fields have been mapped to the AD Resource Fields:



Mapping for Resource Type User

Source AD
Resource Type User

Group
Users

Action Fields Matching

Internal Field	Resource Field	Update
Attribute 1	{Resource:User ID}	Always
Cell	{Resource:Cell}	Always
Email ID	{Resource:Email}	Always
First Name	{Resource:First Name}	Always
Job Title	{Resource:Job Title}	Always
Login ID	{Resource:User ID}	Always
NT Account Name	{Resource:NT Account Name}	Always
NT Domain Name	{Resource:NT Domain Name}	Always
Surname	{Resource:Surname}	Always
▶ Telephone	{Resource:Telephone}	Always

<

Add Remove

The following Matching Criteria has been used:



Mapping for Resource Type User

Source AD
Resource Type User

Group
Users

Action Fields Matching

On discovery match resource to an existing CMDB Item or Person that meets the following criteria

{Resource:User ID} = {Person:Login ID}

And Or Not Group Ungroup Delete

Add to the **Pending Imports** list when

>1 matching records are identified

NO matching records are identified

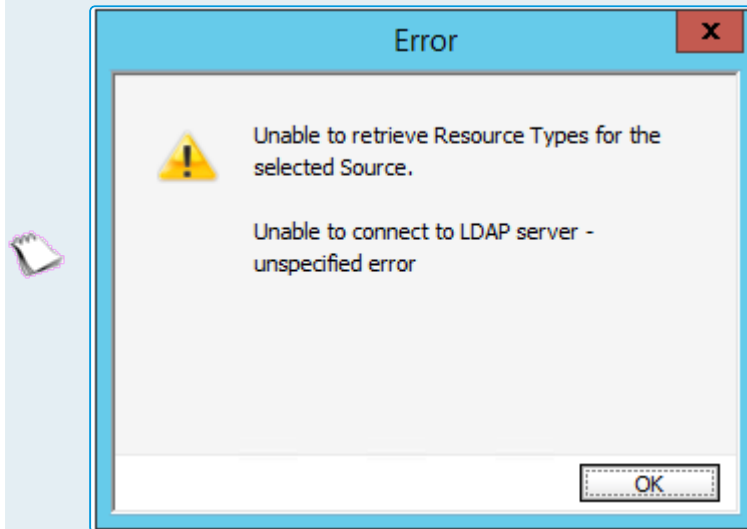
The following activities should be undertaken

- You will need to configure the **AD Source Connection** details with a **Read Only LDAP** account so that you can add AD containers, organizational units or groups as Users and Analysts to vFire Core.
- Add any additional AD Attributes to the **Fields** Tab before cloning the Mapping.
- Add **Location** and **Organization Resolution Rules** to the **Resource Mapping** before cloning the Mapping.
- Remove or deselect **Import** checkbox on the **"Users" Resource Mapping** prior to scheduling an LDAP Scan.



- Once you have configured the AD Connector and prior to scheduling the first LDAP Scan remove the pre-configured **AD LDAP** Connector Source and Resources as this will create errors in the activity log as this is not a valid AD Source.

If you try to access the AD Resource for Type User without first successfully connecting the AD Source you will see an Error message.



Pressing OK will dismiss this error and allow you to review the Resource Mappings.



Appendix A - Service Catalog

Service Type to Service mapping

Service Type	Service	Service Description
Technology Services	Email and Messaging	Sending and receiving emails, email distribution lists, email access and recovery, instant messaging
	Telephony and Mobile Communications Support	Desktop and mobile telephone services as well as Desktop voice mail.
	PC services	Installation of pre-approved software, PC moves, one the spot training and guidance.
	Ordering – Software, PC, Printer and Mobile Devices	Order IT resources including new starter set-ups. IT asset removal and disposal for retired equipment.
	Printing and Copying	Printing in black and white, and colour in A4 and A3. Copying. Copying to PDF and email. Copying to file locations.
	Video conferencing and projectors	Set up of video conference meetings and on call support. Set up of projectors for training and meetings.
	Access and User Permissions	The control of user permissions to file shares, networks, systems, intranet and extranet
Enterprise Services	Intranet Content Management	Intranet site maintenance and page creation.



Service Type	Service	Service Description
Professional Services	Consulting and Training	<p>Provide professional advice on selecting and purchasing the most suitable software and hardware for your business needs.</p> <p>Training sessions on core business systems.</p>



Service to Service Action mapping



Business Service	Service Action Name	Linked Workflow Template	Visibility on Self Service Portal
Access and User Permissions	Amend User Details	RS_REQ_Amend User Details	Yes



Business Service	Service Action Name	Linked Workflow Template	Visibility on Self Service Portal
	Amend User Permissions	RS_REQ_Amend User Permissions	Yes
	Delete User	RS_REQ_Delete User	Yes
	New User	RS_REQ_New User	Yes
	Access data on Cloud Storage	RS_REQ_Access data on cloud storage	Yes
	Access to an existing application	RS_REQ_Access to an existing application	Yes
	Access to SharePoint Site or library	RS_REQ_Access to cloud storage site	Yes
	Access to Social Media	RS_REQ_Access to Social Media	Yes
	Access to Streaming Media	RS_REQ_Access to streaming media site	Yes
	Access to Team Drive	RS_REQ_Access to team drive	Yes
	Block/Unblock Website	RS_REQ_Block/unblock website- public	Yes
	Change Name	RS_REQ_Change Name	Yes
	Close User Account	RS_REQ_Close User Account	Yes



Business Service	Service Action Name	Linked Workflow Template	Visibility on Self Service Portal
	Reinstate User Account	RS_REQ_Reinstate User Account	Yes
	Suspend User Account	RS_REQ_Suspend User Account	Yes
	Reset My Colleague's Network Password	RS_REQ_Reset Colleague Password	Yes
	New User –Grant Access	Basic Service Action Request Fulfilment	No
	Staff Exit – Disable all user access	Basic Service Action Request Fulfilment	No
	Request Remote Access	Basic Service Action Request Fulfilment	No
	Reset my network password	Basic Service Action Request Fulfilment	No
	Grant/remove access to a network drive	Basic Service Action Request Fulfilment	No
	Grant/remove access to a folder	Basic Service Action Request Fulfilment	No
	Create/delete folders	Basic Service Action Request Fulfilment	No



Business Service	Service Action Name	Linked Workflow Template	Visibility on Self Service Portal
	Restore a deleted/missing file or folder from Backup	Basic Service Action Request Fulfilment	No
	Modify team member network access	Basic Service Action Request Fulfilment	No



Business Service	Service Action Name	Linked Workflow Template	Visibility on Self Service Portal
Email and Messaging	Access to an existing Team Mailbox	RS_REQ_AccessToExistingTeamMailbox	No
	Access to an existing Team Calendar	RS_REQ_Access to existing Team Calendar	No
	Change Distribution List	RS_REQ_Change Distribution List	No
	Change Existing Email Address	RS_REQ_Change existing email address	No
	Access to an Individuals Mailbox	RS_REQ_AccessToAnIndividual'sMailbox	No
	Add Email Address to Mailbox	RS_REQ_Add email address to mailbox	No
	Mailbox Quote Increase	RS_REQ_Mailbox increase	No
	New Team Mailbox	RS_REQ_New Team Mailbox	No
	Remove Email Address from Mailbox	RS_REQ_Remove email Address from Ma	No
	Delete Distribution List	RS_REQ_Delete Distribution List	No
	Delete Team Mailbox	RS_REQ_Delete Team Mailbox	No
	New Calendar	RS_REQ_New Calendar	No



Business Service	Service Action Name	Linked Workflow Template	Visibility on Self Service Portal
	New Distribution List	RS_REQ_New Distribution List	No



Business Service	Service Action Name	Linked Workflow Template	Visibility on Self Service Portal
	Request Guidance	Basic Service Action Request Fulfilment	No
	Create/Modify/Delete a Mailbox	Basic Service Action Request Fulfilment	No
	Create/Modify access to a Mailbox	Basic Service Action Request Fulfilment	No
	Create/Modify a Distribution List	Basic Service Action Request Fulfilment	No
	Release a Blocked Email	Basic Service Action Request Fulfilment	No
	Access another users Mailbox	Basic Service Action Request Fulfilment	No
	Restore a missing or deleted email	Basic Service Action Request Fulfilment	No
	Increase Inbox Size Limit	Basic Service Action Request Fulfilment	No
	Join/Leave a Distribution List	Basic Service Action Request Fulfilment	No
	Create/Delete a Distribution List	Basic Service Action Request Fulfilment	No



Business Service	Service Action Name	Linked Workflow Template	Visibility on Self Service Portal
	Add an Email Address(s) to Blacklist (ban) or whitelist (allow)	Basic Service Action Request Fulfilment	No



Business Service	Service Action Name	Linked Workflow Template	Visibility on Self Service Portal
Telephony and Mobile Communications	New Voicemail /Reset Voicemail PIN	RS_REQ_New Reset Voicemail PIN	No
	New/Replacement Headset	RS_REQ_New/Replacement Headset	No
	Pick Up Group	RS_REQ_Pick Up Group	No
	Cease Phone Line	RS_REQ_Cease phone line	No
	Diverts (Phone & Fax)	RS_REQ_Diverts (phone & fax)	No
	Request a Mobile Phone	RS_REQ_Request a mobile phone	No
	Hunt Group	RS_REQ_Hunt Group	No
	Request to Return a Mobile Phone	RS_REQ_Request to return a mobile phone	No
	International Dialing	RS_REQ_International Dialling	No
	International Roaming	RS_REQ_International Roaming	No
	Line/Phone Relocations	RS_REQ_Line / Phone relocations	No
	New Phone Line	RS_REQ_New Phone Line	No
	New Team Drive	RS_REQ_New Team Drive	No



Business Service	Service Action Name	Linked Workflow Template	Visibility on Self Service Portal
	New Telephone/Data Sockets	RS_REQ_New Telephone / Data Sockets	No
	Request Guidance	Basic Service Action Request Fulfilment	Yes
	Request a new phone	Basic Service Action Request Fulfilment	Yes
	Move a desk phone to a different desk	Basic Service Action Request Fulfilment	Yes
	Allow access to international dialing	Basic Service Action Request Fulfilment	Yes
	Set up voicemail	Basic Service Action Request Fulfilment	Yes
	Delete a voicemail account	Basic Service Action Request Fulfilment	Yes
	Restore a missing or deleted email	Basic Service Action Request Fulfilment	Yes
	Access another person's voicemail	Basic Service Action Request Fulfilment	Yes
	Replace a lost/stolen mobile phone	Basic Service Action Request Fulfilment	Yes



Business Service	Service Action Name	Linked Workflow Template	Visibility on Self Service Portal
	Turn off/on mobile phone data usage while overseas	Basic Service Action Request Fulfilment	Yes
	Turn off/on international roaming	Basic Service Action Request Fulfilment	Yes
	Reset password for mobile phone	Basic Service Action Request Fulfilment	Yes
	Reset mobile SIM PIN	Basic Service Action Request Fulfilment	Yes



Business Service	Service Action Name	Linked Workflow Template	Visibility on Self Service Portal
PC Services	Online Subscription Setup	RS_REQ_Online subscription setup	No
	PIN Reset/Unlock	RS_REQ_Pin Reset/Unlock	No
	Application Upgrade/Update	RS_REQ_Application Upgrade / Update	No
	Install/Reinstall Application	RS_REQ_Install/Reinstall Application	No
	Report a Lost or Stolen Device	RS_REQ_ Lost-Stolen device	No
	Connect a Device	RS_REQ_Connect a device	No
	Register a Security Token	RS_REQ_Register Token	No
	Restore a File or Folder	RS_REQ_Restore a file or folder	No
	Transfer Hard Token	RS_REQ_Transfer Token	No
	Block/Unblock a USB Device	RS_REQ_Block/Unblock a USB device	No
	Live Data Socket	RS_REQ_Live data socket	No
	Map a Drive to a Computer	RS_REQ_Map a Drive to a computer	No
	Map a Printer	RS_REQ_Map a Printer	No



Business Service	Service Action Name	Linked Workflow Template	Visibility on Self Service Portal
	Feature Suggestion or Enhancement	RS_REQ_Feature Suggestion or Enhancement	No
	Request guidance	Basic Service Action Request Fulfilment	Yes
	Install new software	Basic Service Action Request Fulfilment	Yes
	Uninstall software	Basic Service Action Request Fulfilment	Yes
	Move a desktop PC to a new location	Basic Service Action Request Fulfilment	Yes
	New Starter -PC and network set up	Basic Service Action Request Fulfilment	Yes
	Staff Exit - PC collection	Basic Service Action Request Fulfilment	Yes
Service Not Listed	I Can't find what I'm looking for	RS_REQ_Advice and Guidance	No
	Service Not Listed	Basic Service Action Request Fulfilment	No



Business Service	Service Action Name	Linked Workflow Template	Visibility on Self Service Portal
PC, Printing and Tablet Ordering	Request guidance	Basic Service Action Request Fulfilment	Yes
	Order a PC/Laptop	Basic Service Action Request Fulfilment	Yes
	Order a Tablet	Basic Service Action Request Fulfilment	Yes
	Order a desktop printer	Basic Service Action Request Fulfilment	Yes
	Order a multifunction device	Basic Service Action Request Fulfilment	Yes
Video Conferencing and Projectors	Book set up assistance for a video conference	Basic Service Action Request Fulfilment	Yes
	Book assistance for connecting a projector	Basic Service Action Request Fulfilment	Yes



Business Service	Service Action Name	Linked Workflow Template	Visibility on Self Service Portal
Printing and Copying	Connect a Printer	RS_REQ_Connect a printer	No
	Connect a Scanner	RS_REQ_Connect a scanner	No
	Request guidance	Basic Service Action Request Fulfilment	Yes
	Grant access to a colour printer	Basic Service Action Request Fulfilment	Yes
	Grant access to a specific printer	Basic Service Action Request Fulfilment	Yes
	Replace a print toner	Basic Service Action Request Fulfilment	Yes
	Grant permissions to scan to a network drive using the photocopier	Basic Service Action Request Fulfilment	Yes



Business Service	Service Action Name	Linked Workflow Template	Visibility on Self Service Portal
Intranet Content Management	New Website Development	RS_REQ_New website Dev	No
	Archive/Delete Page/Graphic/Form	RS_REQ_Archive/Delete Page/Graphic/Form	No
	Create/Edit/Update Form	RS_REQ_Create/edit/update forms	No
	Create/Edit/Update Graphic	RS_TSK_Create/edit/update graphic	No
	Create/Edit/Update Page	RS_REQ_Create/edit/update page (s)	No
	Archive page/graphic/form	Basic Service Action Request Fulfilment	Yes
	Create/edit/update Forms	Basic Service Action Request Fulfilment	Yes
	Create/edit/update graphic	Basic Service Action Request Fulfilment	Yes
	Change Navigation	RS_REQ_Change navigation	Yes
	Add/delete/change intranet page(s)	Basic Service Action Request Fulfilment	Yes
	Short URL – create/delete/redirect	Basic Service Action Request Fulfilment	Yes

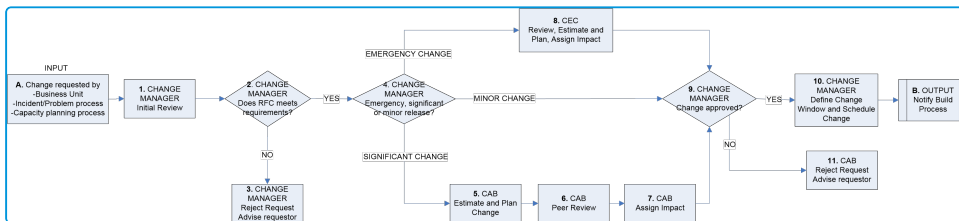


Business Service	Service Action Name	Linked Workflow Template	Visibility on Self Service Portal
	Provide site statistics	Basic Service Action Request Fulfilment	Yes
Consulting and Training	Assistance with Reports	RS_REQ_Assistance with Papercut Reports	No
	Request advice on selecting a software solution	Basic Service Action Request Fulfilment	Yes
	Purchase a selected software solution	Basic Service Action Request Fulfilment	Yes
	Request advice on selecting a hardware solution	Basic Service Action Request Fulfilment	Yes
	Purchase a selected hardware solution	Basic Service Action Request Fulfilment	Yes
	Request for IT training	Basic Service Action Request Fulfilment	Yes
	Access to an existing application	Basic Service Action Request Fulfilment	Yes



Appendix B - Change, and Release and Deployment Management

Change Management Workflow Template Detail




Step	Detail	Document Details
A	Change requested This input can have many sources including other processes.	REQUEST FOR CHANGE



Step	Detail		Document Details
1	Change Manager: Initial Review	Task Type: Change Manager Review Request Status (on completion): Change Manager Reviewed	CHANGE RELEASE STANDARDS IMPACT ASSESSMENT
<p>Review details of the RFC.</p> <p>Analyze the request with consideration given to the corporate CHANGE RELEASE STANDARDS.</p> <p>Consider if sufficient information has been provided in order for adequate planning and estimating, and priority (emergency, significant, minor), impact and urgency assignment. Complete a considered IMPACT ASSESSMENT.</p> <p>This is an opportunity to identify requests that should be dealt with by the Service Desk, and the Incident/Problem management process.</p> <p>The user requirements for the RFC may be negotiated at this point i.e. KPI and success measures. Updates to the REQUEST FOR CHANGE document, or RFC 'Description' field in vFire should be made when changes are agreed.</p>			
2	DECISION: Change Manager: RFC meets requirements?	Approval Type: Managerial Approval Request Status (on completion): Managerial – Rejected, Managerial - Approved	
Result of initial review			



Step	Detail		Document Details
3	Change Manager: Reject Request, Advise requestor	Task Type: Advise Requestor of Rejection Request Status (on completion): Rejection Advised	
	<p>Determination has been made that either the Change Request Standards was not met, or the request should be routed through the Service Desk.</p> <p>Advise requestor of the decision and close RFC using an appropriate closure profile (to enable meaningful reporting). Provide details of non-compliance with the standard if appropriate.</p> <div style="background-color: #e0f0ff; padding: 5px; border: 1px solid #add8e6;">  Within vFire this step is completed in two tasks; the Messaging Task, and Closure task. These can be automated. </div>		



Step	Detail		Document Details
4	DECISION: Change Manager: Emergency, significant or minor release?	N/A	
	<p>Time frames and impact information provided in the REQUEST FOR CHANGE document will determine if the request requires the accelerated emergency workflow.</p> <p>Minor changes do not require the full review process of the CAB. The Change Manager has the authority to progress the workflow. Typically minor changes have a low impact and are not resource intensive.</p> <p>If not an emergency release or minor change then it is a significant change. The full review process of the CAB is required.</p> <p style="text-align: center;">This step does not appear within the workflow template as it is dealt with using Conditional Branching task.</p>		
5	CAB: Estimate and plan change Task Type: Planning	Request Status (on completion): Planned	REQUEST FOR CHANGE
	<p>This is a significant change requiring the full review process of the CAB.</p> <p>Resource estimates, include purchasing, training, staffing and the business and financial costs of downtime, are calculated.</p>		




Step	Detail		Document Details
	<p>The rollout timeframe, including milestones, are mapped and compared with resource availability and other RFCs underway or in planning. Criteria for rollback should also be developed at this point.</p> <p>This information and CAB findings are recorded in the Request For Change document, or the Request 'Description' field within vFire.</p>		
6	Release Manager: Peer review	Task Type: Review Request Status (on completion): Reviewed	
	<p>Peer review of the estimates and plan helps to ensure that all considerations have been taken into account.</p> <p>For RFCs leading into the Release Management process this can be undertaken by the Release Manager instead of the CAB.</p>		
7	CAB: Assign Priority/Impact	Task Type: Review Request Status (on completion): Reviewed	REQUEST FOR CHANGE
	<p>Now that all considerations have been measured and confirmed, the impact of the change is determined and applied to the Request.</p> <p>The impact level assigned to the Request takes into consideration the loss of service if change does not proceed successfully or on time. Included in this is the business impact - loss of system availability, impact on user productivity, user experience and user expectation as well as the financial impact.</p> <p>At this point, success and fail criteria should be provided so that Packaging can develop an appropriate BACK OUT PLAN.</p>		



Step	Detail		Document Details
8	CEC: Review, Estimate and Plan, Assign Impact	Task Type: Review Request Status (on completion): Reviewed	
	For emergency RFCs the three steps of the CAB process are abbreviated into one step for the Change		
	Emergency Committee, a smaller subset of the CAB. <ul style="list-style-type: none"> • Estimate and Plan Change • Peer Review • Assign Impact • Set success/failure criteria 		
9	DECISION: Change Manager: Change approved?	Approval Type: Managerial Approval Request Status (on completion): Managerial – Rejected, Managerial - Approved	
	The Change Manager now has all the information required to make a decision to proceed with the change, or to reject it and close the RFC.		
10	Change Manager: Define Change Window and Schedule Change	Task Type: Schedule Request Status (on completion): Scheduled	
	The Change Manager can now schedule the RFC taking into account change blackout periods and scheduled downtime.		




Step	Detail		Document Details
A	INPUT: Approved RCF through CAB, CEC.		RELEASE REQUEST
	The request to create a build comes from the approved Release Management RFC, and can include more than one child request. It can be in the form of a RELEASE REQUEST document.		
B	INPUT: Approved RFC. New version request from Testing		BUILD DESIGN
	This input indicates a return of the build from testing, where testing has requested a build content change. The version number remains unchanged and the principal BUILD DESIGN document is re-used.		
1	DECISION: EMERGENCY or MINOR release	N/A	RELEASE REQUEST
	<p>If the release is an Emergency priority then the RELEASE REQUEST document can be delayed until after workflow has been approved and Build Designer is in the design phase.</p> <p>If the release is a Minor Release (pre-approved and regular releases) then no unique RELEASE REQUEST document is required. You may choose to link to a single major release RELEASE REQUEST document to all minor releases.</p> <div data-bbox="300 1368 1201 1480" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px;">  This step does not appear within the workflow template as it is dealt with using the Conditional Branching task. </div>		




Step	Detail		Document Details
2	Build Manager: Organize Change Initiator to update Request Documentation	Task Type: Documentation Request Status (on completion): Documented	RELEASE REQUEST
Organize Change Initiator to update the RELEASE REQUEST document, either as a document attached to the Request or within the request 'Description' field of vFire.			
3	Build Manager: Create build record in CMDB	Task Type: CMDB Update Request Status (on completion): Build	
Update CMDB with information about the build.			
4	DECISION: Build Manager: Build approved?	Approval Type: Managerial Approval Request Status (on completion): Managerial – Rejected, Managerial - Approved	
Build approved?			
5	Build Manager: Update CMDB	Task Type: Update CMDB Request Status (on completion): Build	RELEASE REQUEST PACKAGING REFUSAL
Build has not been approved. Update the build within the CMDB.			




Step	Detail		Document Details
6	Build Manager: Advise requestor. Return release to CAB.	Task Type: Advise Requestor of Rejection Request Status (on completion): Rejection Advised	
<p>Update RELEASE REQUEST with refusal reason or record separately on BUILD REFUSAL document.</p> <p>Notify the requestor and advise any linked RFCs of the rejection. Advise CAB (Note: the CAB may reopen the RFC from this point and continue with the release).</p> <div style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px; margin-top: 10px;">  Within VFire this step is completed in two tasks; the Messaging Task, and Closure task. These can be automated. The messaging task notifies the CAB. </div>			
7	Build Manager: Update CMDB record	Task Type: CMDB update Request Status (on completion): Build	BUILD PROJECT PLAN
Build has been approved. Link all CI components of the release to the build record and link to the RFC. Create links to all CIs impacted by Release. Assess likely impact (an impact assessment may already have been completed by the CAB)			




Step	Detail		Document Details
8	Build Manager: Prioritise and assign build tasks	Task Type: Planning Request Status (on completion): Planned	
	<p>Prioritize and assign tasks expediently if an emergency release. It is possible to build in a rule, that if the RFC has a Status of Emergency, then default time frames will be changed to a more expedient set that you define.</p> <p>Store BUILD PROJECT PLAN in an appropriate location with consideration given to stakeholder accessibility.</p> <p>This can be against the request, in the Knowledge Bank or against the CMDB record of the build.</p>		
9	DECISION: EMERGENCY release?	N/A	
 This step is dealt with using the Conditional Branching task within the workflow template.			
10	Build Manager: Finalize and add request document to DSL	Task Type: Documentation Request Status (on completion): Documented	RELEASE REQUEST
	Finalize deferred RELEASE REQUEST document.		



Step	Detail		Document Details
11	Build Designer: Design build. Finalize documentation.	Task Type: Design Request Status (on completion): Build	BUILD DESIGN BACK OUT PLAN Draft BUILD TEST PLAN BUILD IMPACT
<p>Consider the needs of applications. Perform a manual install to assist with this determination. Perform basic tests on the build if required.</p> <p>Complete the BUILD DESIGN document.</p> <p>If this is a minor release, update the major release BUILD DESIGN document.</p>			
<p>Create a BACK OUT PLAN document.</p> <p>Optionally, complete a draft BUILD TEST PLAN for use in testing.</p> <p>Optionally, complete a BUILD IMPACT. Record issues of significance that may be of interest to the rollout team. This document is recommended for high impact release.</p> <div data-bbox="304 1581 1201 1688" style="background-color: #e0f2f1; padding: 5px; border-radius: 5px;">  If the same person is acting as both Build Designer and Creator, consider inserting a peer review step. </div> <p>Note any discussion details and outcomes in the BUILD DESIGN document.</p>			




Step	Detail		Document Details
12	Build Creator: Create build, add to DSL	Task Type: Create Request Status (on completion): Created	
	Compile/create the build. Update the DSL within the CMDB.		
13	DECISION: EMERGENCY or MINOR release?	N/A	
	 This step is dealt with using the Conditional Branching task within the workflow template.		
14	Build Creator: Update documentation	Task Type: Documentation Request Status (on completion): Documented	BUILD DESIGN
	Update the BUILD DESIGN document with enough detail to allow another Build Creator to reproduce the build quickly.		

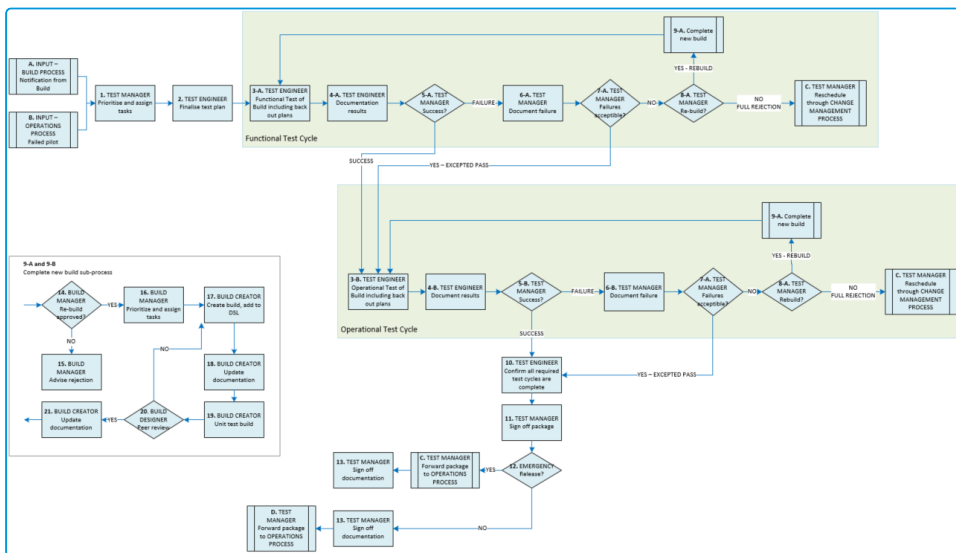


Step	Detail		Document Details
15	Build Creator: Unit test build	Task Type: Unit Test Request Status (on completion): Build	BUILD TEST PLAN BUILD IMPACT BACK OUT PLAN
<p>Confirm the basic build requirements have been met and that the build installs correctly.</p> <p>Confirm that the BACK OUT PLAN is effective and feasible.</p> <p>Update/create BUILD TEST PLAN. Include test recommendations for the Testing area.</p>			
16	DECISION Build Designer: Peer Review	Approval Type: Managerial Approval Request Status (on completion): Managerial – Rejected, Managerial - Approved	
<p>Confirm build is practical, workable, complete and efficient.</p> <p>The reviewer should not be the same person who is the Build Designer. Update the BUILD DESIGN document with any findings.</p> <p>Deposit final build in DSL.</p>			



Step	Detail	Document Details
C	<p>Forward to the testing area.</p> <p>If an emergency release any documentation is updated after forwarding of the release to testing area.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  This step is dealt with using the Create Request task. This task generates the testing RFC on completion of the build phase. </div>	

Test





Step	Detail	Document Details
A	Notification from Build	
B	Return from Operations – Pilot has failed.	



Step	Detail		Document Details
1	Test Manager: Prioritise and assign tasks	Task Type: Planning Request Status (on completion): Planned	
	Prioritise and assign tasks. It is possible to build in a rule, that if the RFC has a Status of Emergency, then default time frames will be changed to a more expedient set as defined.		
2	Test Engineer: Finalise test plan	Task Type: Documentation Request Status (on completion): Release Testing	BUILD TEST PLAN
	Update/add and finalise BUILD TEST PLAN. Contents of the plan will be dependant on the particular testing cycle. Can include: functional testing, operational testing, performance testing, integration testing, user acceptance testing For Emergency release, this document may be completed in brief with a focus on communicating results, and finalised later.		



Step	Detail		Document Details
3-A	Test Engineer: Functional Test of Build	Task Type: Test Request Status (on completion): Release Testing	BACK OUT PLAN
	<p>Complete tests outlined in the Functional test plan.</p> <div style="background-color: #e6f2ff; padding: 10px; border: 1px solid #d9e1f2;">  For major releases there should be at least 2 test cycles; functional testing and operational acceptance testing. Functional, operational and performance testing may also be included. </div> <p>Minor releases also have integration, performance and release/user acceptance testing, however, test plans can be limited to focus on areas of greatest impact, as minor releases are changes to specific components of the business operation environment.</p>		
	<p>Pre-approved minor releases may not require release acceptance testing. The extent of testing must take into account the low impact of pre-approved releases.</p> <p>For emergency releases the volume and potential risk to the organization versus a reduction in the number of tests must be weighed against the urgency of the change.</p> <div style="background-color: #e6f2ff; padding: 10px; border: 1px solid #d9e1f2;">  To adjust this workflow for your business processes add or remove Test Cycle components to the template. </div>		





Step	Detail		Document Details
4-A	Test Engineer: Document Results	Task Type: Documentation Request Status (on completion): Documented	BUILD TEST RESULTS spreadsheet
	Record any testing milestones in BUILD TEST RESULTS.		
5-A	DECISION Test Manager: Determine success or failure	Approval Type: Managerial Approval Request Status (on completion): Managerial - Approval / Managerial - Rejected	CHANGE RELEASE STANDARDS CHANGE RELEASE POLICY
	<p>Determine test pass or fail according to the CHANGE RELEASE STANDARDS, which is part of the CHANGE RELEASE POLICY of your organization.</p> <p>Later in the workflow an Excepted Pass can be granted if the build contains test failures, but the risks of not implementing the build are greater than the risk presented by the failures (therefore APPROVE). Alternatively if the failures are not acceptable, but outright rejection is not appropriate, it can be returned to the Build process for a rebuild (therefore REJECT).</p>		





Step	Detail		Document Details
6-A	Test Manager: Document failure	Task Type: Documentation Request Status (on completion): Documented	BUILD FAILURE
<p>Create BUILD FAILURE document. Store.</p> <p>If emergency release, documentation can be posted until after a decision has been made on whether to proceed.</p> <p>The template would need to be adjusted if this is to be accommodated.</p>			
7-A	DECISION Test Manager: Failures acceptable?	Approval Type: Managerial Approval	
		Request Status (on completion): Managerial - Approved / Managerial - Rejected	
<p>A decision is required on whether failures are severe enough to require the cancellation of the release, and the return of the build to Change Management (REJECT)</p> <p>Later in the workflow an Excepted Pass can be granted if the build contains test failures, but the risks of not implementing the build are greater than the risk presented by the failures (APPROVE). Alternatively if the failures are not acceptable, but outright rejection is not appropriate, it can be returned to the Build process for a rebuild.</p>			




Step	Detail		Document Details
8-A	DECISION Test Manager: Rebuild or full rejection?	Request Status (on completion): Managerial - Approved / Managerial - Rejected	
	<p>A decision is required on whether failures are severe enough to require the cancellation of the release, and the return of the build to Change Management.</p> <p>If the failures are not acceptable, but outright rejection is not appropriate, it can be returned to the Build process for a rebuild (APPROVE).</p> <p>If full rejection is required, the Test Manager is informed to reschedule the Change (REJECT).</p>		
9-A	Complete new build sub-process	Task Type: Build Request Status (on completion): Release Testing	
	<p>The level of failures in the build has been unacceptable. It must be rebuilt.</p> <p> This step is made up of multiple tasks. These are handled by a component workflow within VFire.</p>		
C	Test Manager: Reschedule through Change Management	Task Type: Notification Request Status (on completion): Release Testing	
	<p>The entire build is rejected by Testing and is returned to the Change Management process for rescheduling.</p> <p> Within VFire the step is completed in two tasks; the Messaging Task, and Closure task. These can be automated.</p>		




Step	Detail		Document Details
3-B to 9-B	Repeat of testing cycle. This cycle is for Operational testing.		
10	Test Engineer: Confirm all required test cycles are complete	Task Type: Planning Request Status (on completion): Planned	
 The template only allows for two testing cycles, Functional and Operational. Adjust the template to add more testing cycles, i.e. integration, release/user acceptance and performance.			
11	Test Manager: Sign off build	Task Type: Documentation Request Status (on completion): Release Testing	
Confirm that the CORPORATE BUILD RELEASE STANDARDS of your organization have been met.			
12	DECISION: Emergency release?	N/A	
If an emergency release, then completion of documentation is delayed until after sign off has been communicated to the Operations process.  This step appears within the workflow template as a Conditional Branching task.			



Step	Detail		Document Details
13	Test Manager: Sign off documentation	Task Type: Documentation Request Status (on completion): Release Testing	
	Check the content of all documentation.		
D	Forward build to Operations Process  This step is dealt with using the Create Request task. This task generates the testing RFC on completion of the build phase.		
Complete New Build sub-process			
14	DECISION Build Manager: Re-build approved?	Approval Type: Managerial Approval Request Status (on completion): Managerial - Approved / Managerial - Failed	
	The last build has been returned from testing due to unacceptable failures. A rebuild is requested.		
15	Build Manager: Advise rejection	Task Type: Advise Requestor of rejection Request Status (on completion): Release Testing	



Step	Detail		Document Details
	Advise requestor. Return release to CAB  Within VFire, the step is completed in two tasks; the Messaging Task, and Closure task. These can be automated.		
16	Build Manager: Prioritise and assign correction tasks, send for rebuild	Task Type: Planning Request Status (on completion): Release Testing	
	Prioritise and assign failure correction tasks. For emergency releases these time frames should be expedited.		
17	Build Creator: Create build, add to DSL	Task Type: Create Request Status (on completion): Release Testing	
	Compile/create the build. Update the DSL within the CMDB.		
18	Build Creator: Update documentation	Task Type: Documentation Request Status (on completion): Release Testing	
	Update the BUILD DESIGN document with enough detail to allow another Build Creator to reproduce the build quickly.		

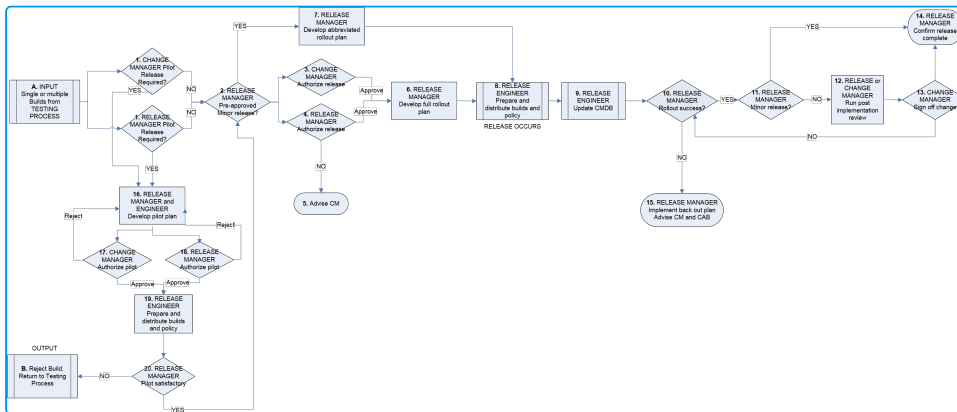


Step	Detail		Document Details
19	Build Creator: Unit test build	Task Type: Unit test Request Status (on completion): Release Testing	
	Confirm the basic build requirements have been met and that the build installs correctly. Confirm that the BACK OUT PLAN is effective and feasible. Update/create BUILD TEST PLAN. Include tests recommendations for the Testing area.		
20	DECISION Build Designer: Peer review	Approval Type: Managerial Approval Request Status (on completion): Managerial - Approved / Managerial - Rejected	
	Confirm build is practical, workable, complete and efficient. The reviewer should not be the same person who is the Build Designer. Update the BUILD DESIGN document with any findings. Deposit final build in DSL.		



Step	Detail		Document Details
21	Build Creator: Update documentation	Task Type: Documentation Request Status (on completion): Release Testing	
	Update the BUILD DESIGN document with enough detail to allow another Build Creator to reproduce the build quickly.		

Operations (Live)




Step	Detail		Document Details
A	Notification from Testing		




Step	Detail		Document Details
1	DECISION Release and Change Manager: Pilot Release required?	Approval Type: Managerial Approval Request Status (on completion): Managerial Rejected / Managerial Approved	
<p>A pilot implementation confirms your release strategy and verifies that the released applications are working correctly in the target live environment.</p> <p>All Major releases should have a pilot.</p> <p>Minor releases need to have the impact weighed against the effort when considering a pilot phase.</p> <p>Emergency releases still benefit from pilot implementations; however reduced time frames would most likely be used. Ensure that any stakeholders are notified about the pilot implementation decision.</p> <p>NOTE: Within the VFire template it has been assumed that one approval is sufficient to require a pilot phase. This can be changed on the activation task.</p>			




Step	Detail		Document Details
2	DECISION Release Manager: Pre-approved Minor release?	Approval Type: Managerial Approval Request Status (on completion): Managerial Rejected / Managerial Approved	
A pre-approved Minor release may have abbreviated documentation requirements with approvals delegated to the release team.  This step does not appear within the workflow template as it is dealt with using Conditional Branching task.			
3 and 4	DECISION Release Manager, Change Manager: Authorize Release	Approval Type: Managerial Approval Request Status (on completion): Managerial Rejected / Managerial Approved	
Prior to rollout approval must be provided by the Release Manager and the Change Manager. Approval from affected Business Units may also be required. NOTE: Within the VFire template it has been assumed that one approval is sufficient to authorize release. This can be changed on the activation task			




Step	Detail		Document Details
5	Change Manager: Release Rejected. Notify	Task Type: Advise Requestor of Rejection Request Status (on completion): Operations	
	<p>Close this RFC. Notify the requestor and advise any linked RFCs of the rejection. Advise CAB (Note: the CAB may reopen the RFC from this point and continue with the release).</p> <p>Update the build within the CMDB.</p> <div data-bbox="296 719 1110 875" style="border: 1px solid #ccc; padding: 5px; background-color: #e6f2ff;"> <p> Within VFire this step is completed in two tasks; the Messaging Task, and Closure task. These can be automated. The messaging tasks notifies the CAB.</p> </div>		



Step	Detail		Document Details
6	Release Manager: Develop full rollout plan	Task Type: Planning Request Status (on completion): Planned	ROLLOUT PLAN RISK ASSESSMENT ROLLOUT POLICY
<p>If the release is not pre-approved or minor, then a full rollout plan is developed. In the ROLL OUT PLAN detail the steps required to install the release to all targeted business unit users. The plan must comply with your organizations ROLLOUT POLICY.</p> <p>As part of this process review the BUILD IMPACT document and undertake a risk assessment (which can be documented separately).</p> <p>Back out Plans are essential and can be incorporated into the ROLLOUT PLAN.</p> <div style="border: 1px solid #ccc; padding: 10px; background-color: #f0f8ff;"> <p> Emergency release still require a comprehensive roll out plan, however, these may be less formally recorded (emails, memo's) and may be decentralised. Within the VFire template it has been assumed that one approval is sufficient to authorize the release. This can be changed on the activation task.</p> </div>			
7	Release Manager: Develop abbreviated rollout plan	Task Type: Planning Request Status (on completion): Planned	
<p>An abbreviated ROLL OUT PLAN will be less detailed but still include instructions for backing out of a failed release.</p> <p>Consider using a proforma rollout plan which can be modified for each individual release.</p>			




Step	Detail		Document Details
8	Release Engineer: Prepare and distribute build and policy	Task Type: Prep and Distribute Request Status (on completion): Prep and Distribute Completed	
9	Release Engineer: Update CMDB	Task Type: CMDB Update Request Status (on completion): Operations	
10	DECISION Release Manager: Rollout success?	Approval Type: Managerial Approval Request Status (on completion): Managerial Rejected / Managerial Approved	ROLLOUT PLAN ROLLOUT POLICY
	Determine if the rollout has met the minimum success criteria in line with the ROLLOUT PLAN and ROLLOUT POLICY.		
11	DECISION Release Manager: Minor release?	N/A	If release is minor then post implementation review is not likely to be required. If an unexpected number of incidents have resulted, then a post implementation review should be considered.  This step does not appear within the workflow template as it is dealt with using the conditional branching task.




Step	Detail		Document Details
12	Release Manager or Change Manager: Run post implementation review	Task Type: Review Request Status (on completion): Reviewed	POST IMPLEMENTATION REVIEW
<p>Determine if the initial objectives of the release have been met (refer to the PACKAGE DESIGN document). If they have not been met determine if they have changed, or if another release is required to meet those objectives.</p> <p>This step is vital for emergency releases as formal steps may have been postponed, lightly documented and communication of decisions not recorded. The review should ensure all documentation has now been completed and that sign offs have been documented.</p> <p>Checks should be conducted on CIs in the CMDB to ensure status (including archiving) and versioning has been updated.</p>			
13	Change Manager: Sign off change	Approval Type: Managerial Approval Request Status (on completion): Managerial Rejected / Managerial Approved	
<p>All RFCs associated with the release can now be closed given a satisfactory post implementation review.</p> <p>Close all linked parent RFCs.</p>			




Step	Detail		Document Details
14	Release Manager: Release complete.	Task Type: Review Request Status (on completion): Completed	
	<p>All RFCs associated with the release can now be closed given a satisfactory post implementation review.</p> <p>Close all linked parent RFCs.</p> <p>Checks should be conducted on CIs in the CMDB to ensure status (including archiving) and versioning has been updated.</p>		
15	Release Manager: Implement back out plan	Task Type: Backing out Request Status (on completion): Operations	PACKAGE DESIGN
	<p>Following the determination that the release has failed the back out plan is implemented in accordance with documentation. This includes reversing any updates to CMDB (versioning and archiving).</p> <p>Advise the Change Manager and the CAB of the results.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  Within VFire this step is completed in two tasks; the Messaging Task, and Closure task. These can be automated. The messaging task notifies the CAB. </div>		BACK OUT PLAN
16	Release Engineer: Develop pilot plan	Task Type: Planning Request Status (on completion): Planned	PILOT PLAN
	<p>The pilot plan should be planned and implemented in the same manner as the full release. The pilot roll out should be identical to that of the full release but with a smaller target of users.</p>		

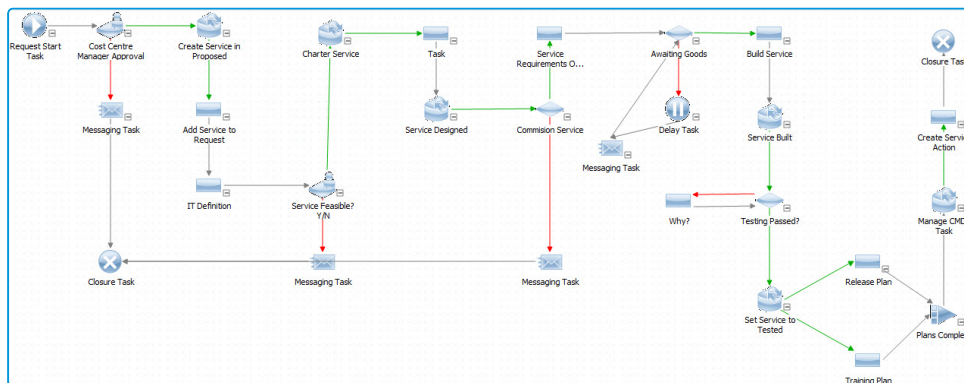


Step	Detail		Document Details
17 & 18	DECISION Release Manager, Change Manager: Authorize pilot	Approval Type: Managerial Approval Request Status (on completion): Managerial Rejected / Managerial Approved	
Prior to pilot, approval must be provided by the Release Manager and the Change Manager. Approval from affected Business Units may also be required. <div style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px; margin: 5px 0;">  Within the workflow template it has been assumed that one approval is sufficient to require a pilot. This can be changed on the activation task. </div>			
19	Release Engineer: Prepare and distribute builds and policy	Task Type: Prep and Distribute Request Status (on completion): Prep and Distribute Completed	
20	DECISION Release Manager: Pilot successful?	Approval Type: Managerial Approval Request Status (on completion): Managerial Rejected / Managerial Approved	PILOT PLAN
Evaluate whether the pilot has demonstrated that a release is appropriate, taking into account the known failures measured against the risk not releasing the build. Update the PILOT PLAN with results including known failures, and if rejected, the rejection reason.			ROLLOUT POLICY RELEASE POLICY



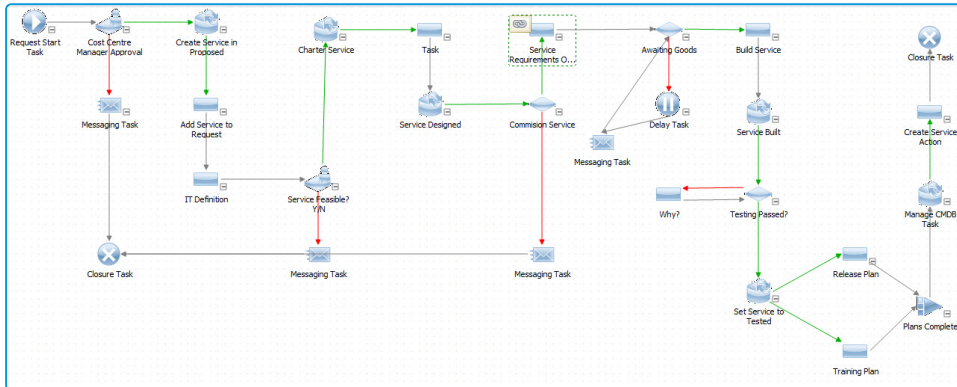
Step	Detail	Document Details
B	<p>Reject Package. Return to Testing Process</p> <p>If the pilot has demonstrated an unacceptable number of failures (in according with your organizations CORPORATE ROLLOUT POLICY which is part of your RELEASE POLICY) then it may be returned to the Testing Process to identify areas of failure. The Testing Process may then in turn return the build to the Packaging Process for repackaging.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> Within the workflow template a Create RFC task (return to test) and Closure task (close operations) are configured. These can be automated.</p> </div>	

Service Introduction

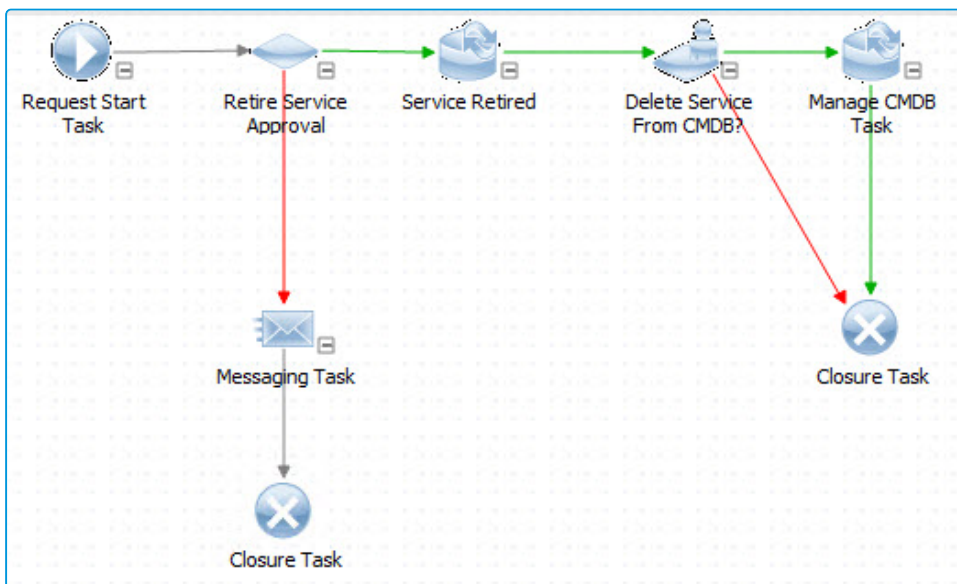




Service Change

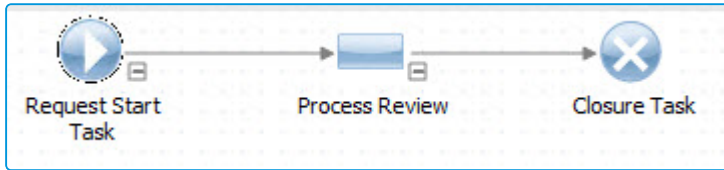


Service Retirement





Service Portfolio Management Review





Appendix C - Rapid Start Administration Settings

CMDB Admin Setting	Value
CMDB Items/People	People Linked to Organisations, Refresh Person Details
Audit Trail	On for All Entities
Default Visibility	Config Items
CMDB Item Window	Manufacturer to Model
Linking Diagram	Enable Full Expansion
CMDB Item Class	Customer Service, Business Service, ICT Service, System
CMDB Item Service Types	Technology Services, Enterprise Services, Professional Services
Service Portal Display Category	Exact match to Service Titles i.e Email and Messaging
CMDB Item Criticality	Critical, Non-Critical
CMDB Item Status	In Development, In Production, Retired, In Test, In Repair, On Order, Lost/Stolen
Service Portfolio Status	Service Pipeline, Service Catalogue [P], Service Retired, Proposed, Chartered, Designed
CMDB Item Service Level	Platinum, Gold, Silver, Bronze

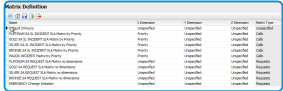


IPK Management Admin Setting	Value
IPK Settings	<p>Enable IPK Status and Streams – Link Stream/Status to call screen set, Limit Type by IPK Status</p> <p>Enable Impact/Urgency Priority derivation</p> <p>Call Resolution By Knowledge: Closure Status=Closed. Closure Reason=Resolved through Knowledge</p> <p>IPK Workflow Rules Builder: Enabled</p> <p>Scripting: Enabled</p> <p>Options: User Survey, Type Tiers (3), Call Audit</p>
IPK Settings (Partitioned)	<p>Closure Method: Immediate</p> <p>Support Groups: Group by default</p> <p>Support Skills: Enabled</p> <p>Options: Call Linking, Reason Forced, Call Notes</p>
Screen Sets	Incident, ICT Incident, Major Incident , Problem, Known Error, Service Request
Call type	Performance degradation, Loss of Service, Not functioning as expected, Error report investigation, Component failure, Other
Priority	Critical, High, Medium, Low
Urgency	Immediate, Short Term, Medium Term, Long Term



IPK Management Admin Setting	Value																				
Impact	Individual, Team, Department, Organization <table border="1" data-bbox="427 479 1310 667"> <thead> <tr> <th>Impact</th> <th>From</th> <th>To</th> <th>Default</th> </tr> </thead> <tbody> <tr> <td>Organisation</td> <td>81</td> <td>9999</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Department</td> <td>21</td> <td>80</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Team</td> <td>2</td> <td>20</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Individual</td> <td>1</td> <td>1</td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table>	Impact	From	To	Default	Organisation	81	9999	<input type="checkbox"/>	Department	21	80	<input type="checkbox"/>	Team	2	20	<input type="checkbox"/>	Individual	1	1	<input checked="" type="checkbox"/>
Impact	From	To	Default																		
Organisation	81	9999	<input type="checkbox"/>																		
Department	21	80	<input type="checkbox"/>																		
Team	2	20	<input type="checkbox"/>																		
Individual	1	1	<input checked="" type="checkbox"/>																		
Closure Reasons	Resolved – Workaround Provided, Training Provided, Fix Applied, Documentation Review, Service resumed – cause unknown, Process failure/not followed, 3 rd , Party System issue, Resolved – RFC Applied, Resolved – workaround found, KE created, Unresolved – Too costly, Unresolved – Unable to reproduce, Resolved – Through Knowledge																				
Call Status Titles	New, Allocated, In Progress, Awaiting Information, Resolved, Closed, (resolve selected) , Awaiting Major Incident Resolution, Awaiting RFC																				
IPK Status (to Reporting Group)	Incident (Incident Management) IT Incident (Incident Management) Major Incident (Incident Management) Problem (Problem Management) Known Error (Problem Management) Service Request (Service Request)																				
Action Type	Phone Call, Desk Visit, Remote Visit, Investigation, Solution Design, Install, Testing, Travel, Documentation																				



Service Level Management Admin Setting	Value
Agreement Selection Priority	Rules Builder Request Template
Working hours	9-5, 5 days a week
Recipients based on	Assigned to Group
Matrix Definition	

Workflow Management Administration Setting	Value
Workflow Management Settings	Task Forwarding: Groups Default Approvals – Forwarding, Require Email Approval Token Activation Rules, that Incl. Tasks In Rules and Close Inactive - Tasks/Approvals Multiple Screen Sets: Requests, Multiple Tasks Set Request Completion Status on Task Closure - selected Options: User Survey, User Approval Access to Request Objects, Audit Workflow, Audit Task
Workflow Process	Change Management, Release Management, Service Request Fulfillment, Service Portfolio Management, HR Processes
Request Type	Service Action Request



Workflow Management Administration Setting	Value
Request Screen Set	Service Request Fulfillment
Request Priority	Emergency, Significant, Minor
Request Risk	High, Medium and Low
Request Types	Move/Add/Change
Task Screen Set	Service Request Fulfillment Task
Task Title	Service Request for Fulfillment
Task Type	Service Action Request
Task Priority	High, Medium, Low
Task Phase	Operations
Analyst Groups	Change Advisory Board Member, Change Emergency Committee Member, Change Manager, Release Manager, Build Manager, Build Creator, Build Designer, Test Manager, Release Engineer, Test Engineer
Request Completion Statuses	Change Initiation, Installed, Reviewed, Completed (this is also a Closure completion status), Managerial – Rejected, Managerial – Approved , Operations, Prep and Distribute Complete, Review Passed, Review Failed, Release Testing, Documented, Planned, Build, Rejected, Created, Change Manager Reviewed, Rejection Advised, Scheduled



Workflow Management Administration Setting	Value
Task Types	Installation Production, Review, CMDB Update, Advise Requestor, Planning, Prep and Distribute, Backing Out, Advise Requestor of Rejection, Create, Documentation, Unit Test, Test, Notification, Closure, Design, Change Manager Review, Schedule
Approval Types	Managerial Approval
Request Priorities	Emergency, Significant, Minor
Task Priorities	High, Medium, Low
Task Status Titles	Current, Forward Internally, Forward To Group, Completed this is also a Closure status title)
Task Phases	Operations, Post Implementation Review, Operations Pilot, Build, Initiation, Test



Appendix D - Security Roles

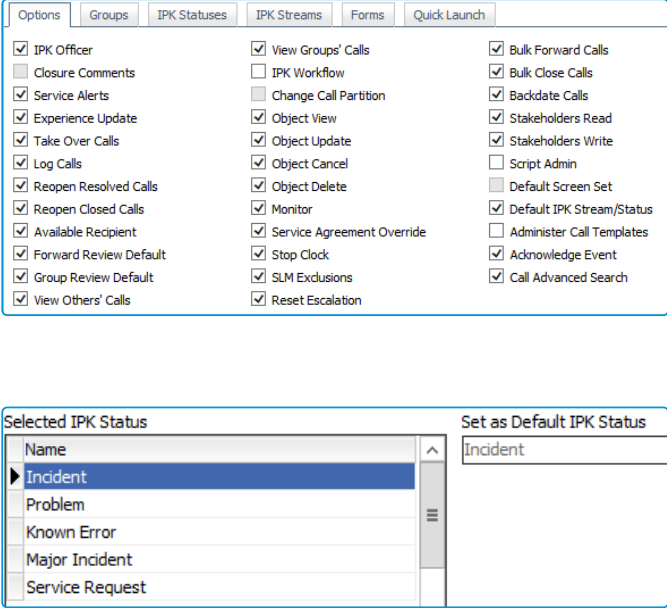
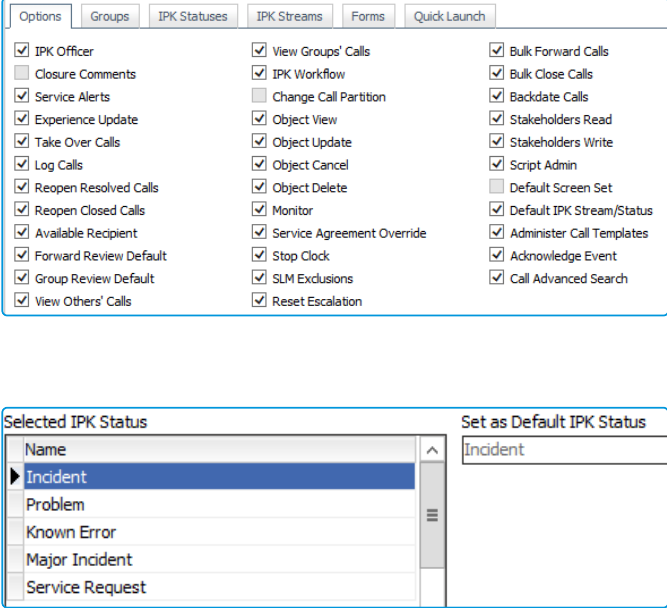
Security Roles General Access	Value
Administrator	
All	System Role: All Options Enabled
Analyst	
Process Manager	



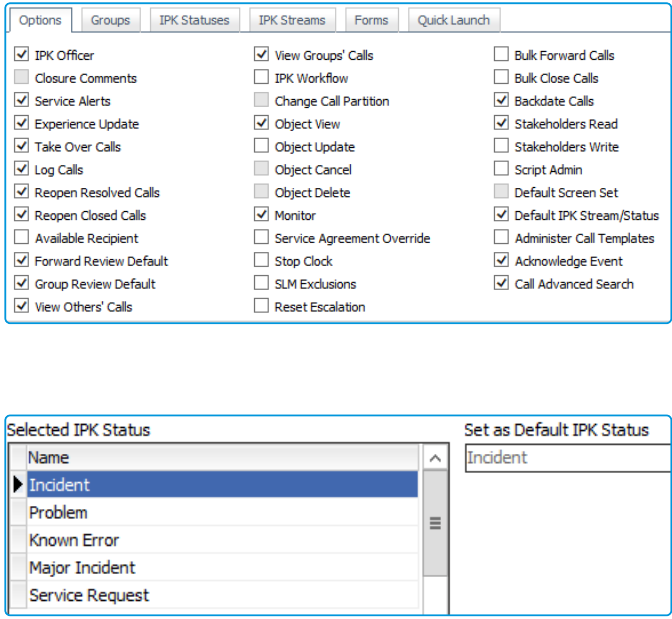
Security Roles General Access	Value
Process Owner	
None	System Role: No Options Enabled

Security Roles IPK Management	Value
All	System Role: All Options Enabled
Analyst Applications Analyst Technical Analyst Service Desk Analyst	



Security Roles IPK Management	Value
Process Manager Service Desk Manager Technical Manager Applications Manager	 <p>The screenshot shows the 'IPK Management' configuration interface. The 'IPK Statuses' tab is active, displaying a grid of options with checkboxes. The 'Selected IPK Status' dropdown is set to 'Incident'. The options include:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> IPK Officer <input type="checkbox"/> Closure Comments <input checked="" type="checkbox"/> Service Alerts <input checked="" type="checkbox"/> Experience Update <input checked="" type="checkbox"/> Take Over Calls <input checked="" type="checkbox"/> Log Calls <input checked="" type="checkbox"/> Reopen Resolved Calls <input checked="" type="checkbox"/> Reopen Closed Calls <input checked="" type="checkbox"/> Available Recipient <input checked="" type="checkbox"/> Forward Review Default <input checked="" type="checkbox"/> Group Review Default <input checked="" type="checkbox"/> View Others' Calls <input checked="" type="checkbox"/> View Groups' Calls <input type="checkbox"/> IPK Workflow <input type="checkbox"/> Change Call Partition <input checked="" type="checkbox"/> Object View <input checked="" type="checkbox"/> Object Update <input checked="" type="checkbox"/> Object Cancel <input checked="" type="checkbox"/> Object Delete <input checked="" type="checkbox"/> Monitor <input checked="" type="checkbox"/> Service Agreement Override <input checked="" type="checkbox"/> Stop Clock <input checked="" type="checkbox"/> SLM Exclusions <input checked="" type="checkbox"/> Reset Escalation <input checked="" type="checkbox"/> Bulk Forward Calls <input checked="" type="checkbox"/> Bulk Close Calls <input checked="" type="checkbox"/> Backdate Calls <input checked="" type="checkbox"/> Stakeholders Read <input checked="" type="checkbox"/> Stakeholders Write <input type="checkbox"/> Script Admin <input type="checkbox"/> Default Screen Set <input checked="" type="checkbox"/> Default IPK Stream/Status <input type="checkbox"/> Administer Call Templates <input checked="" type="checkbox"/> Acknowledge Event <input checked="" type="checkbox"/> Call Advanced Search
Process Owner Service Desk Supervisor	 <p>The screenshot shows the 'IPK Management' configuration interface for Process Owner and Service Desk Supervisor. The 'IPK Statuses' tab is active, displaying a grid of options with checkboxes. The 'Selected IPK Status' dropdown is set to 'Incident'. The options include:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> IPK Officer <input type="checkbox"/> Closure Comments <input checked="" type="checkbox"/> Service Alerts <input checked="" type="checkbox"/> Experience Update <input checked="" type="checkbox"/> Take Over Calls <input checked="" type="checkbox"/> Log Calls <input checked="" type="checkbox"/> Reopen Resolved Calls <input checked="" type="checkbox"/> Reopen Closed Calls <input checked="" type="checkbox"/> Available Recipient <input checked="" type="checkbox"/> Forward Review Default <input checked="" type="checkbox"/> Group Review Default <input checked="" type="checkbox"/> View Others' Calls <input checked="" type="checkbox"/> View Groups' Calls <input checked="" type="checkbox"/> IPK Workflow <input type="checkbox"/> Change Call Partition <input checked="" type="checkbox"/> Object View <input checked="" type="checkbox"/> Object Update <input checked="" type="checkbox"/> Object Cancel <input checked="" type="checkbox"/> Object Delete <input checked="" type="checkbox"/> Monitor <input checked="" type="checkbox"/> Service Agreement Override <input checked="" type="checkbox"/> Stop Clock <input checked="" type="checkbox"/> SLM Exclusions <input checked="" type="checkbox"/> Reset Escalation <input checked="" type="checkbox"/> Bulk Forward Calls <input checked="" type="checkbox"/> Bulk Close Calls <input checked="" type="checkbox"/> Backdate Calls <input checked="" type="checkbox"/> Stakeholders Read <input checked="" type="checkbox"/> Stakeholders Write <input checked="" type="checkbox"/> Script Admin <input type="checkbox"/> Default Screen Set <input checked="" type="checkbox"/> Default IPK Stream/Status <input checked="" type="checkbox"/> Administer Call Templates <input checked="" type="checkbox"/> Acknowledge Event <input checked="" type="checkbox"/> Call Advanced Search



Security Roles IPK Management	Value
Senior Manager	
None	System Role: No Options Enabled

Security Roles Workflow Management	Value
All	System Role: All Options Enabled



Security Roles Workflow Management	Value
Analyst	<div data-bbox="587 376 935 474"> <p>Home Requests Tasks Processes Groups Req. Screen Sets Task Screen Sets App. Screen Sets Customer Apps</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Workflow Officer <input checked="" type="checkbox"/> Available Request <input checked="" type="checkbox"/> Budget <input checked="" type="checkbox"/> Monitor <input checked="" type="checkbox"/> New Change Calendar <input checked="" type="checkbox"/> Update Change Calendar <input checked="" type="checkbox"/> Delete Change Calendar <input checked="" type="checkbox"/> Cancel Change Calendar Lock <input type="checkbox"/> Allocate Requests to Change Calendar <input type="checkbox"/> Change Calendar Object View <input type="checkbox"/> Change Calendar Object Update <input type="checkbox"/> Change Calendar Object Cancel <input type="checkbox"/> Change Calendar Object Delete <input checked="" type="checkbox"/> New Manage OMS Transactions <input checked="" type="checkbox"/> Edit Manage OMS Transactions </div> <div data-bbox="587 564 935 680"> <p>Home Requests Tasks Processes Groups Req. Screen Sets Task Screen Sets App. Screen Sets Customer Apps</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Create Request <input checked="" type="checkbox"/> Request Object View <input checked="" type="checkbox"/> Request Object Update <input checked="" type="checkbox"/> Request Object Cancel <input checked="" type="checkbox"/> Request Object Delete <input checked="" type="checkbox"/> Request Disablers Read <input checked="" type="checkbox"/> Request Disablers Write <input checked="" type="checkbox"/> New Request Schedules <input checked="" type="checkbox"/> Admin Request Schedules <input checked="" type="checkbox"/> Template Admin <input checked="" type="checkbox"/> Edit Workflow <input type="checkbox"/> Manager <input type="checkbox"/> Request Take Over <input type="checkbox"/> Acknowledge Request <input type="checkbox"/> Acknowledge Event <input type="checkbox"/> New Other's Requests <input type="checkbox"/> Request Group Review Default <input type="checkbox"/> Request Forward Review Default <input type="checkbox"/> Request Authorizer <input type="checkbox"/> Request Stop Click <input type="checkbox"/> Request Change Agreement <input type="checkbox"/> Request BULK Forward <input type="checkbox"/> Request BULK Over <input type="checkbox"/> Request Advanced Search </div> <div data-bbox="587 770 935 900"> <p>Home Requests Tasks Processes Groups Req. Screen Sets Task Screen Sets App. Screen Sets Customer Apps</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Take Over Tasks <input checked="" type="checkbox"/> Approver <input checked="" type="checkbox"/> Take Over Approvals <input type="checkbox"/> Complete Other's Approvals <input type="checkbox"/> Request Tasks <input type="checkbox"/> Request Approvals <input type="checkbox"/> Back Date Tasks <input type="checkbox"/> Back Date Approvals <input checked="" type="checkbox"/> New Suspended <input type="checkbox"/> Task Stop Click <input type="checkbox"/> SLM Task Exclusions <input checked="" type="checkbox"/> Task Change Agreement <input type="checkbox"/> Task Object View <input type="checkbox"/> Task Object Update <input type="checkbox"/> Task Object Cancel <input type="checkbox"/> Update Phase on Task <input type="checkbox"/> View Other's Tasks <input type="checkbox"/> New Group's Tasks <input type="checkbox"/> Task Group Review Default <input type="checkbox"/> Task Forward <input type="checkbox"/> Task BULK Forward <input type="checkbox"/> Task BULK Close <input type="checkbox"/> Edit Conditional Branching Task <input type="checkbox"/> Edit Activation Task <input type="checkbox"/> Edit Manage OMS Task <input type="checkbox"/> Task Advanced Search </div>
Process Manager	<div data-bbox="587 1003 935 1102"> <p>Home Requests Tasks Processes Groups Req. Screen Sets Task Screen Sets App. Screen Sets Customer Apps</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Workflow Officer <input checked="" type="checkbox"/> Available Request <input checked="" type="checkbox"/> Budget <input checked="" type="checkbox"/> Monitor <input checked="" type="checkbox"/> New Change Calendar <input checked="" type="checkbox"/> Update Change Calendar <input checked="" type="checkbox"/> Delete Change Calendar <input checked="" type="checkbox"/> Cancel Change Calendar Lock <input type="checkbox"/> Allocate Requests to Change Calendar <input type="checkbox"/> Change Calendar Object View <input type="checkbox"/> Change Calendar Object Update <input type="checkbox"/> Change Calendar Object Cancel <input type="checkbox"/> Change Calendar Object Delete <input checked="" type="checkbox"/> New Manage OMS Transactions <input checked="" type="checkbox"/> Edit Manage OMS Transactions </div> <div data-bbox="587 1191 935 1308"> <p>Home Requests Tasks Processes Groups Req. Screen Sets Task Screen Sets App. Screen Sets Customer Apps</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Create Request <input checked="" type="checkbox"/> Request Object View <input checked="" type="checkbox"/> Request Object Update <input checked="" type="checkbox"/> Request Object Cancel <input checked="" type="checkbox"/> Request Object Delete <input checked="" type="checkbox"/> Request Disablers Read <input checked="" type="checkbox"/> Request Disablers Write <input checked="" type="checkbox"/> New Request Schedules <input checked="" type="checkbox"/> Admin Request Schedules <input checked="" type="checkbox"/> Template Admin <input checked="" type="checkbox"/> Edit Workflow <input type="checkbox"/> Manager <input type="checkbox"/> Request Take Over <input type="checkbox"/> Acknowledge Request <input type="checkbox"/> Acknowledge Event <input type="checkbox"/> New Other's Requests <input type="checkbox"/> Request Group Review Default <input type="checkbox"/> Request Forward Review Default <input type="checkbox"/> Request Authorizer <input type="checkbox"/> Request Stop Click <input type="checkbox"/> Request Change Agreement <input type="checkbox"/> Request BULK Forward <input type="checkbox"/> Request BULK Over <input type="checkbox"/> Request Advanced Search </div> <div data-bbox="587 1397 935 1527"> <p>Home Requests Tasks Processes Groups Req. Screen Sets Task Screen Sets App. Screen Sets Customer Apps</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Take Over Tasks <input checked="" type="checkbox"/> Approver <input checked="" type="checkbox"/> Take Over Approvals <input type="checkbox"/> Complete Other's Approvals <input type="checkbox"/> Request Tasks <input type="checkbox"/> Request Approvals <input type="checkbox"/> Back Date Tasks <input type="checkbox"/> Back Date Approvals <input checked="" type="checkbox"/> New Suspended <input type="checkbox"/> Task Stop Click <input type="checkbox"/> SLM Task Exclusions <input checked="" type="checkbox"/> Task Change Agreement <input type="checkbox"/> Task Object View <input type="checkbox"/> Task Object Update <input type="checkbox"/> Task Object Cancel <input type="checkbox"/> Update Phase on Task <input type="checkbox"/> View Other's Tasks <input type="checkbox"/> New Group's Tasks <input type="checkbox"/> Task Group Review Default <input type="checkbox"/> Task Forward <input type="checkbox"/> Task BULK Forward <input type="checkbox"/> Task BULK Close <input type="checkbox"/> Edit Conditional Branching Task <input type="checkbox"/> Edit Activation Task <input type="checkbox"/> Edit Manage OMS Task <input type="checkbox"/> Task Advanced Search </div>

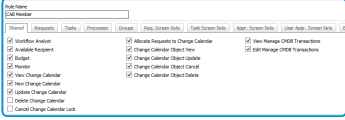
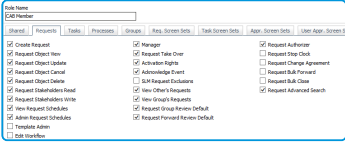
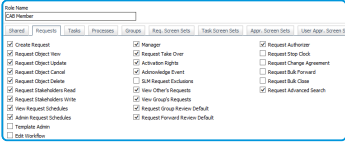
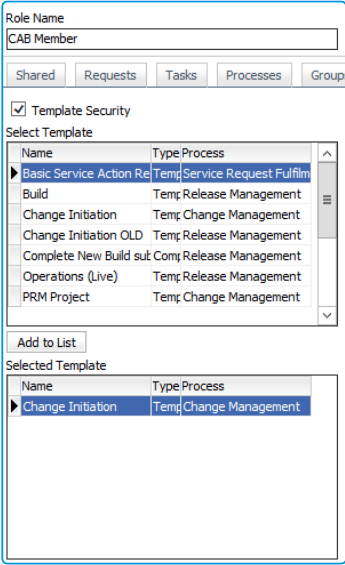


Security Roles Workflow Management	Value
<p>Process Owner</p>	<div data-bbox="582 376 928 477"> <p>Global Requests Tasks Processes Groups Req. Screen Sets Task Screen Sets App. Screen Sets Customer App. S.</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Available Officer <input checked="" type="checkbox"/> Available Request <input checked="" type="checkbox"/> Budget <input checked="" type="checkbox"/> Monitor <input checked="" type="checkbox"/> New Change Calendar <input checked="" type="checkbox"/> New Change Calendar <input checked="" type="checkbox"/> Update Change Calendar <input checked="" type="checkbox"/> Update Change Calendar <input checked="" type="checkbox"/> Cancel Change Calendar Lock <input checked="" type="checkbox"/> Allocate Requests to Change Calendar <input checked="" type="checkbox"/> Change Calendar Object View <input checked="" type="checkbox"/> Change Calendar Object Update <input checked="" type="checkbox"/> Change Calendar Object Cancel <input checked="" type="checkbox"/> Change Calendar Object Delete <input checked="" type="checkbox"/> New Manage OHR Transactions <input checked="" type="checkbox"/> Edit Manage OHR Transactions </div> <div data-bbox="582 566 928 689"> <p>Global Requests Tasks Processes Groups Req. Screen Sets Task Screen Sets App. Screen Sets Customer App. S.</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Create Request <input checked="" type="checkbox"/> Request Object View <input checked="" type="checkbox"/> Request Object Update <input checked="" type="checkbox"/> Request Object Cancel <input checked="" type="checkbox"/> Request Object Delete <input checked="" type="checkbox"/> Request Object Renew <input checked="" type="checkbox"/> Request Object Write <input checked="" type="checkbox"/> Admin Request Schedules <input checked="" type="checkbox"/> Transfer Admin <input checked="" type="checkbox"/> Edit Workflow <input checked="" type="checkbox"/> Manager <input checked="" type="checkbox"/> Request Take Over <input checked="" type="checkbox"/> Acknowledge Rights <input checked="" type="checkbox"/> Acknowledge Events <input checked="" type="checkbox"/> Acknowledge Exclusions <input checked="" type="checkbox"/> View Other's Requests <input checked="" type="checkbox"/> View Group's Requests <input checked="" type="checkbox"/> Request Group Renew Default <input checked="" type="checkbox"/> Request Forward Renew Default <input checked="" type="checkbox"/> Request Authorizer <input checked="" type="checkbox"/> Request Stop Clock <input checked="" type="checkbox"/> Request Change Agreement <input checked="" type="checkbox"/> Request Bulk Forward <input checked="" type="checkbox"/> Request Bulk Clear <input checked="" type="checkbox"/> Request Advanced Search </div> <div data-bbox="582 779 928 902"> <p>Global Requests Tasks Processes Groups Req. Screen Sets Task Screen Sets App. Screen Sets Customer App. S.</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Take Over Tasks <input checked="" type="checkbox"/> Approver <input checked="" type="checkbox"/> Take Over Approvals <input checked="" type="checkbox"/> Complete Other's Approvals <input checked="" type="checkbox"/> Rescan Tasks <input checked="" type="checkbox"/> Rescan Approvals <input checked="" type="checkbox"/> Book Date Tasks <input checked="" type="checkbox"/> Book Date Approvals <input checked="" type="checkbox"/> View Suspended <input checked="" type="checkbox"/> Task Stop Clock <input checked="" type="checkbox"/> Stop Task Exclusions <input checked="" type="checkbox"/> Task Change Agreement <input checked="" type="checkbox"/> Task Object View <input checked="" type="checkbox"/> Task Object Update <input checked="" type="checkbox"/> Task Object Cancel <input checked="" type="checkbox"/> Task Object Delete <input checked="" type="checkbox"/> Update Phase on Tasks <input checked="" type="checkbox"/> View Other's Tasks <input checked="" type="checkbox"/> View Group's Tasks <input checked="" type="checkbox"/> Task Group Renew Default <input checked="" type="checkbox"/> Task Forward Renew Default <input checked="" type="checkbox"/> Task Bulk Forward <input checked="" type="checkbox"/> Task Bulk Clear <input checked="" type="checkbox"/> Edit Conditional Branching Task <input checked="" type="checkbox"/> Edit Action Task <input checked="" type="checkbox"/> Edit Manage OHR Task <input checked="" type="checkbox"/> Task Advanced Search </div>

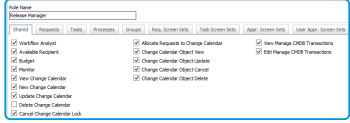
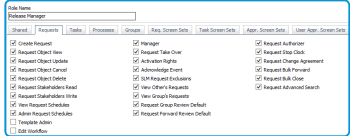
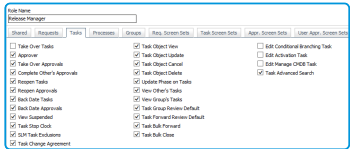
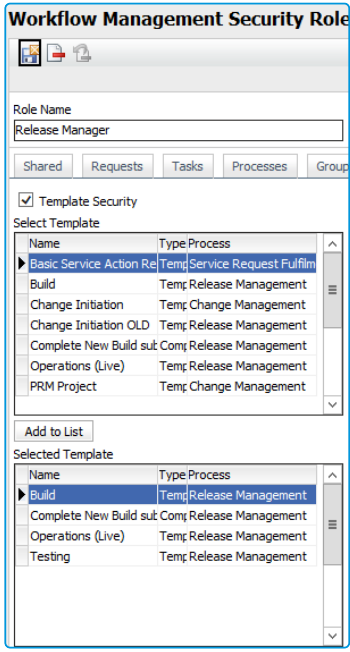


Security Roles Workflow Management	Value																				
Change Manager	<div data-bbox="587 371 935 501"> <p>Role Name: Change Manager</p> <ul style="list-style-type: none"> Available Request Available Request Budget Change New Change Calendar Update Change Calendar Delete Change Calendar Cancel Change Calendar Lock Assign Request to Change Calendar Change Calendar Object New Change Calendar Object Update Change Calendar Object Cancel Change Calendar Object Delete New Change Object Transaction Edit Manage OCH2 Transaction </div> <div data-bbox="587 589 935 725"> <p>Role Name: Change Manager</p> <ul style="list-style-type: none"> Create Request Request Object New Request Object Update Request Object Cancel Request Object Delete Request Object Hold Request Object Release Admin Request Schedule Template Admin Edit Workflow Manage Request Take Over Activation Rights Assignment Event SM Request Estimate New OCH2 Request New Group Request Request Group Form Default Request Forward Form Default Request Authorize Request Hold Clock Request Change Agreement Request Bulk Forward Request Bulk Cancel Request Advanced Search </div> <div data-bbox="587 813 935 958"> <p>Role Name: Change Manager</p> <ul style="list-style-type: none"> Take Over Tasks Approve Take Over Approvals Complete Other Approvals Request Request Approvals Task Over Tasks Task Date Approvals New Submitted Task View Clock Task Task Forward Task Change Agreement Task Object New Task Object Update Task Object Cancel Task Object Delete Update From Set Task New OCH2 Task New Group Task Task Group Form Default Task Bulk Forward Task Bulk Cancel Edit Condition/Working Task Task Action Task Edit Change OCH2 Task Task Advanced Search </div> <div data-bbox="587 1048 935 1608"> <p>Role Name: Change Manager</p> <p>Shared Requests Tasks Processes Group</p> <p><input checked="" type="checkbox"/> Template Security</p> <p>Select Template</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Type/Process</th> </tr> </thead> <tbody> <tr> <td>Basic Service Action Re</td> <td>Temp/Service Request Fulfill</td> </tr> <tr> <td>Build</td> <td>Temp/Release Management</td> </tr> <tr> <td>Change Initiation</td> <td>Temp/Change Management</td> </tr> <tr> <td>Change Initiation OLD</td> <td>Temp/Release Management</td> </tr> <tr> <td>Complete New Build sub</td> <td>Comp/Release Management</td> </tr> <tr> <td>Operations (Live)</td> <td>Temp/Release Management</td> </tr> <tr> <td>PRM Project</td> <td>Temp/Change Management</td> </tr> </tbody> </table> <p>Add to List</p> <p>Selected Template</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Type/Process</th> </tr> </thead> <tbody> <tr> <td>Change Initiation</td> <td>Temp/Change Management</td> </tr> </tbody> </table> </div>	Name	Type/Process	Basic Service Action Re	Temp/Service Request Fulfill	Build	Temp/Release Management	Change Initiation	Temp/Change Management	Change Initiation OLD	Temp/Release Management	Complete New Build sub	Comp/Release Management	Operations (Live)	Temp/Release Management	PRM Project	Temp/Change Management	Name	Type/Process	Change Initiation	Temp/Change Management
Name	Type/Process																				
Basic Service Action Re	Temp/Service Request Fulfill																				
Build	Temp/Release Management																				
Change Initiation	Temp/Change Management																				
Change Initiation OLD	Temp/Release Management																				
Complete New Build sub	Comp/Release Management																				
Operations (Live)	Temp/Release Management																				
PRM Project	Temp/Change Management																				
Name	Type/Process																				
Change Initiation	Temp/Change Management																				

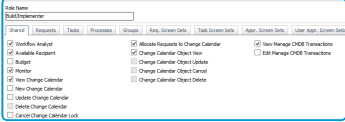
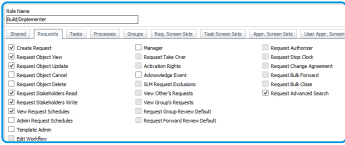
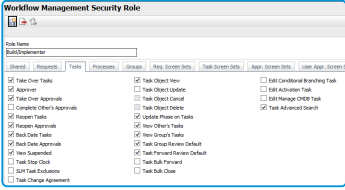
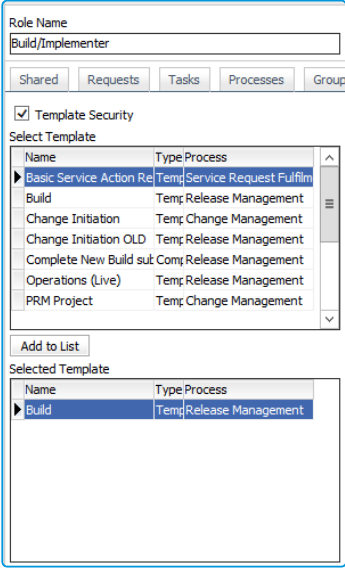


Security Roles Workflow Management	Value
<p>CAB Member</p> <p>ECAB Member</p>	   

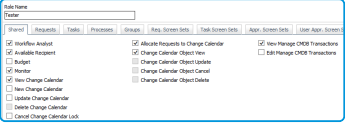
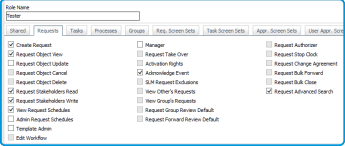
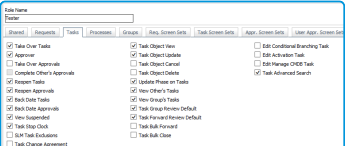
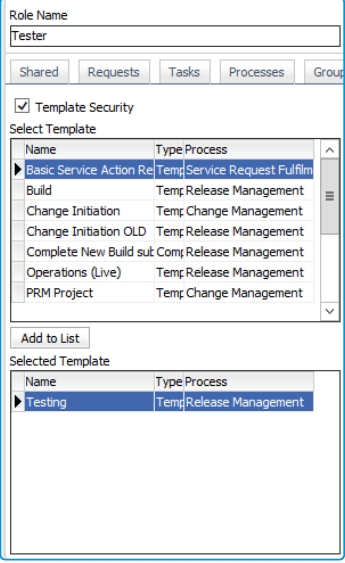


Security Roles Workflow Management	Value
Release Manager	   



Security Roles Workflow Management	Value
Build/Implementer	   



Security Roles Workflow Management	Value
Tester	   
None	System Role: No Options Enabled



Security Roles CMDB	Value
All	System Role: All Options Enabled



Security Roles CMDB	Value
Analyst	<div data-bbox="496 376 842 528"> <p>CMDB Items People Organizations Locations Contracts Subscriber Groups Cost Centers Jurisdictions Forms</p> <p><input type="checkbox"/> CMDB Item Security By Type <input checked="" type="checkbox"/> CMDB Item Advanced Search <input type="checkbox"/> CMDB Item Bulk Update</p> <p><input type="checkbox"/> CMDB Item New <input type="checkbox"/> CMDB Item Link Update <input checked="" type="checkbox"/> Non Transactions</p> <p><input type="checkbox"/> CMDB Item Update <input type="checkbox"/> CMDB Item Renewal Update <input type="checkbox"/> Execute Transactions</p> <p><input type="checkbox"/> CMDB Item Delete <input type="checkbox"/> CMDB Item Transfer Update <input type="checkbox"/> Order Purchase</p> <p><input type="checkbox"/> CMDB Item Self Update <input checked="" type="checkbox"/> CMDB Item Object New <input type="checkbox"/> Transfer</p> <p><input type="checkbox"/> CMDB Item Title Update <input type="checkbox"/> CMDB Item Object Update <input type="checkbox"/> Rate</p> <p><input type="checkbox"/> CMDB Item Cancel Lock <input type="checkbox"/> CMDB Item Object Cancel <input type="checkbox"/> Change Availability Status</p> <p><input type="checkbox"/> CMDB Item Object <input type="checkbox"/> CMDB Item Object Delete <input type="checkbox"/> CMDB Item Object Transfer</p> <p><input type="checkbox"/> CMDB Item Freeze <input checked="" type="checkbox"/> CMDB Item Stakeholders View <input type="checkbox"/> CMDB Item Stakeholders Write</p> <p><input type="checkbox"/> CMDB Item Unfreeze <input type="checkbox"/> CMDB Item Stakeholders Write <input checked="" type="checkbox"/> No Jurisdictions</p> <p><input checked="" type="checkbox"/> CMDB Item Action By Default <input checked="" type="checkbox"/> CMDB Item Cost Center View <input type="checkbox"/> All Jurisdictions</p> <p><input type="checkbox"/> CMDB Item Financial Update <input type="checkbox"/> CMDB Item Cost Center Update</p> </div> <div data-bbox="496 618 842 757"> <p>CMDB Items People Organizations Locations Contracts Subscriber Groups Cost Centers Jurisdictions Forms</p> <p>Customer</p> <p><input checked="" type="checkbox"/> Customer View <input type="checkbox"/> Office View <input checked="" type="checkbox"/> External Office View</p> <p><input type="checkbox"/> Customer New <input type="checkbox"/> Office New <input type="checkbox"/> External Office New</p> <p><input type="checkbox"/> Customer Update <input type="checkbox"/> Office Update <input type="checkbox"/> External Office Update</p> <p><input type="checkbox"/> Customer Delete <input type="checkbox"/> Update PK Groups <input type="checkbox"/> External Office Delete</p> <p><input type="checkbox"/> Update HR/HRM Groups</p> <p><input type="checkbox"/> Office Delete</p> <p>Person</p> <p><input type="checkbox"/> Person Cancel Lock <input type="checkbox"/> Person Object Cancel <input checked="" type="checkbox"/> Person Cost Center View</p> <p><input type="checkbox"/> Person Action By Default <input type="checkbox"/> Person Object Delete <input type="checkbox"/> Person Cost Center</p> <p><input checked="" type="checkbox"/> Person Object New <input checked="" type="checkbox"/> Person Stakeholder View <input type="checkbox"/> Person Stakeholder Write</p> <p><input type="checkbox"/> Person Object Update <input type="checkbox"/> Person Stakeholder Write <input checked="" type="checkbox"/> Person Advanced Search</p> </div> <div data-bbox="496 846 842 972"> <p>CMDB Items People Organizations Locations Contracts Subscriber Groups Cost Centers Jurisdictions Forms</p> <p>Organization</p> <p><input checked="" type="checkbox"/> Organization New <input checked="" type="checkbox"/> External Supplier New</p> <p><input type="checkbox"/> Organization Update <input type="checkbox"/> External Supplier New</p> <p><input type="checkbox"/> Organization Delete <input type="checkbox"/> External Supplier Update</p> <p>All</p> <p><input type="checkbox"/> Organization Title Update <input type="checkbox"/> Organization Object Cancel</p> <p><input checked="" type="checkbox"/> Organization Cancel Lock <input type="checkbox"/> Organization Object Delete <input checked="" type="checkbox"/> Organization Cost Center View</p> <p><input checked="" type="checkbox"/> Organization Action By Default <input checked="" type="checkbox"/> Organization Stakeholder View <input type="checkbox"/> Organization Cost Center Update</p> <p><input checked="" type="checkbox"/> Organization Object New <input type="checkbox"/> Organization Stakeholder Write <input checked="" type="checkbox"/> Organization Advanced Search</p> <p><input type="checkbox"/> Organization Object Update</p> </div> <div data-bbox="496 1061 842 1155"> <p>CMDB Items People Organizations Locations Contracts Subscriber Groups Cost Centers Jurisdictions Forms</p> <p>Location</p> <p><input checked="" type="checkbox"/> Location New <input checked="" type="checkbox"/> Location Object New</p> <p><input type="checkbox"/> Location Update <input type="checkbox"/> Location Object Update</p> <p><input type="checkbox"/> Location Delete <input type="checkbox"/> Location Object Cancel</p> <p><input type="checkbox"/> Location Title Update <input type="checkbox"/> Location Object New</p> <p><input type="checkbox"/> Location Cancel Lock <input type="checkbox"/> Location Stakeholder Write</p> <p><input type="checkbox"/> Location Action By Default <input checked="" type="checkbox"/> Location Advanced Search</p> </div> <div data-bbox="496 1245 842 1344"> <p>CMDB Items People Organizations Locations Contracts Subscriber Groups Cost Centers Jurisdictions Forms</p> <p>Contract</p> <p><input checked="" type="checkbox"/> Contract New <input checked="" type="checkbox"/> Contract Object View</p> <p><input type="checkbox"/> Contract Update <input type="checkbox"/> Contract Object Update</p> <p><input type="checkbox"/> Contract Delete <input type="checkbox"/> Contract Object Cancel</p> <p><input type="checkbox"/> Contract Title Update <input checked="" type="checkbox"/> Contract Stakeholder View</p> <p><input type="checkbox"/> Contract Cancel Lock <input type="checkbox"/> Contract Stakeholder Write</p> <p><input type="checkbox"/> Contract Action By Default <input checked="" type="checkbox"/> Contract Advanced Search</p> </div> <div data-bbox="496 1433 842 1568"> <p>CMDB Items People Organizations Locations Contracts Subscriber Groups Cost Centers Jurisdictions Forms</p> <p>Subscriber Group</p> <p><input checked="" type="checkbox"/> Subscriber Group View <input checked="" type="checkbox"/> Subscriber Group Subscriber Read</p> <p><input type="checkbox"/> Subscriber Group New <input type="checkbox"/> Subscriber Group Subscriber Write</p> <p><input type="checkbox"/> Subscriber Group Update <input type="checkbox"/> Subscriber Group Link Action</p> <p><input type="checkbox"/> Subscriber Group Delete <input type="checkbox"/> Subscriber Group Link Bundle</p> <p><input type="checkbox"/> Subscriber Group Cancel Lock 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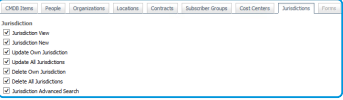


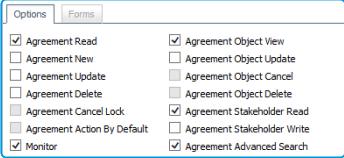
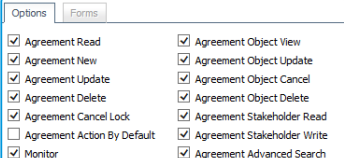
Security Roles CMDB	Value
	<p>CMDB Home Home Organizers Locations Contracts Subscriber Groups Call Centers Jurisdiction Tools</p> <p>Jurisdiction</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Jurisdiction View <input checked="" type="checkbox"/> Jurisdiction New <input checked="" type="checkbox"/> Update On Jurisdiction <input checked="" type="checkbox"/> Delete On Jurisdiction <input type="checkbox"/> Jurisdiction Advanced Search



Security Roles CMDB	Value
Process Owner	<div data-bbox="496 376 842 528"> <p>CMDB Items People Organizations Locations Contracts Subscriber Groups Cost Centers Jurisdictions Home</p> <p><input type="checkbox"/> CMDB Item Security By Type <input checked="" type="checkbox"/> CMDB Item Advanced Search <input checked="" type="checkbox"/> CMDB Item Bulk Update</p> <p><input checked="" type="checkbox"/> CMDB Item View <input checked="" type="checkbox"/> CMDB Item Link Update <input checked="" type="checkbox"/> New Transactions</p> <p><input checked="" type="checkbox"/> CMDB Item New <input checked="" type="checkbox"/> CMDB Item Connect Link Inward <input checked="" type="checkbox"/> New Transactions</p> <p><input checked="" type="checkbox"/> CMDB Item Update <input checked="" type="checkbox"/> CMDB Item Beware Update <input checked="" type="checkbox"/> Execute Transactions</p> <p><input checked="" type="checkbox"/> CMDB Item Delete <input checked="" type="checkbox"/> CMDB Item Template Update <input checked="" 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Security Roles CMDB	Value
	
None	System Role: No Options Enabled

Security Roles SLM	Value
All	System Role: All Options Enabled
Analyst	
Process Manager/Owner	
None	System Role: No Options Enabled

Security Roles Reporting	Value
All	System Role: All Options Enabled



Security Roles Reporting	Value
Analyst	<input checked="" type="checkbox"/> Reporting <input type="checkbox"/> Schedule Admin <input type="checkbox"/> Scheduling <input type="checkbox"/> Designer <input type="checkbox"/> Security
Process Manager	<input checked="" type="checkbox"/> Reporting <input checked="" type="checkbox"/> Schedule Admin <input checked="" type="checkbox"/> Scheduling <input type="checkbox"/> Designer <input type="checkbox"/> Security
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None	System Role: No Options Enabled

Security Roles Availability Management	Value
All	System Role: All Options Enabled
Analyst	<input checked="" type="checkbox"/> Check Setup From List <input checked="" type="checkbox"/> Check Setup From Task <input checked="" type="checkbox"/> Check Setup From System <input checked="" type="checkbox"/> Setup Status <input checked="" type="checkbox"/> Remove Objects <input type="checkbox"/> Check Attributes <input type="checkbox"/> Setup Attributes <input checked="" type="checkbox"/> Run Available From <input type="checkbox"/> Set Available From Targets <input type="checkbox"/> Setup Available
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Process Owner	<input checked="" type="checkbox"/> Check Setup From List <input checked="" type="checkbox"/> Check Setup From Task <input checked="" type="checkbox"/> Check Setup From System <input checked="" type="checkbox"/> Setup Status <input checked="" type="checkbox"/> Remove Objects <input type="checkbox"/> Check Attributes <input type="checkbox"/> Setup Attributes <input checked="" type="checkbox"/> Run Available From <input type="checkbox"/> Set Available From Targets <input type="checkbox"/> Setup Available
None	System Role: No Options Enabled



Security Roles Knowledge Management	Value
All	System Role: All Options Enabled
Analyst	
Process Manager	
Process Owner	
None	System Role: No Options Enabled

Security Roles Bulletin Board	Value
All	System Role: All Options Enabled
Analyst	
Process Manager/Owner	
None	System Role: No Options Enabled



Further Information

Product Information and Online Support

For information about Alemba products, licensing and services, visit www.alemba.com.

For release notes and software updates, go to www.alemba.help.

Up-to-date product documentation, training materials and videos can be found at www.alemba.help/help.



You may need to register to access some of these details.

Technical Support

For technical support, please visit: www.alemba.com and select the **vfire support** link. You will need to log in to the alemba self service portal to contact the Alemba Service Desk.

Comments and Feedback

If you have any comments or feedback on this documentation, submit it to info@alembagroup.com.



Glossary

A

ADM

Application Discovery Manager. It provides an external reporting database which is designed for reporting purposes.

Analyst

A member of IT or other department who has an analyst permissions enabling them to access (log in to) the vFire Core application.

Approval

A type of task that must be signed off electronically by the appropriate person before it can be completed

Authorization

Authorization is the process by which tasks and approvals are released for action. Authorization is given by the request manager

B

base screen set

Certain screen sets are used as templates for custom screen sets. If the custom screen set is not altered, this is the screen set that is used to define the fields and settings used.

C

CMDB

Configuration Management Database. The repository of CMDB items including configuration items, services, service actions, service bundles, software products, inventory items and structures as well as other entity types in the system such as people, organizations, locations and contracts.

CMDB Item Type

CMDB items can be categorized into types. The system then stores settings based on those types.

Configuration Item (CI)

(also referred to as: CI, config item) An asset or piece of equipment, stored in the CMDB, such as printer, desktop and server. Configuration Items include Software



Product, Inventory, Structure, and Package.

Connector

Connectors act as an interface between the vFire Core Integration Platform capabilities and any particular third-party vendor application. Each application requires its own connector to provide a common interface.

CTI

Computer Telephony Integration, a technology that connects computer systems to phone networks

Custom Call Profiles

Custom Call Profiles are types of call extensions, that is, additional fields used by officers to record non-standard information on the Call Details window

F

Federated CMDB

Federated Configuration Management Database - database populated from third party sources

Forward Internally

To forward something internally is the process or action of passing a call, request or task to another analyst within the organization. A request is usually passed internally to another handling analyst when the forwarding analyst is not able to complete the request. Note that a request can only be owned by one analyst at any time.

G

Group

A Group in vFire Core is a team of analysts with a specific area of responsibilities, such as Networking or Hardware. vFire Core distinguishes between IPK (Incident/Problem/Known Error) and workflow groups.

I

IMAP

Internet Message Access Protocol

ITIL

Information Technology Infrastructure Library - documentation which describes best practise methodology for IT Service Management



J

Jurisdiction

A defined group of cost centers and organizations

K

KCS

Knowledge Centric Support

Knowledge Bank

The vFire Core Knowledge Bank is the repository for all the knowledge that is collected in the system. There are seven system defined types of knowledge entries that can be stored in the Knowledge Bank: • Abstracts • Calls (vFire Core) • Directory Entries • External Websites. • FAQs • KCS articles • Known issues

Knowledge Management

The collection, organization, and distribution of knowledge. In this context, knowledge refers to useful and relevant units of information that have been accumulated through learning and experience.

KPI

Key Performance Indicator - a measure of performance commonly used to help an organization define and evaluate how successful it is in making progress towards its long term organizational goals

L

Licence Corral

Licence corrals allow subgroups of licenses to be established, which will guarantee that a number of concurrent licenses will be reserved for members in that subgroup.

Location

Locations can refer to the different departments or branches within an organization and/or the location of a particular user or Configuration Item. They can be specific (for example, Level 3, 100 Miller St) or they can be general (for example Miller St, Sales, or Accounts).



M

MAPI

Messaging Application Programming Interface

MMA

Mail Message Access - the ability to access a call record through a URL at the bottom of an email sent by vFire Core

N

NCM

Network Configuration Manager

O

OLA

Operation Level Agreement These are agreements between internal departments of a service provider. OLAs are applicable to calls, tasks, and approvals.

P

Package

Packages enable items within the CMDB to be grouped. In particular, they can be used to point to a collection of software licenses or patches used, for example, to upgrade the security in a department.

Person

The generic name for both users and analysts in the vFire Core database

POP3

Post Office Protocol 3

Portal

vFire Self Service - the web-based vFire Core interface used by users, analysts and external contact representatives

Portal submission form*

A portal submission form is used for logging requests and calls through vFire Self Service.



Q

Quick Launch application

A shortcut used to launch third party applications directly from within calls, requests or tasks within vFire Core. These can be managed by the System Administrator in Admin>System Administration>Quick Launch(within the System group in the Explorer pane).

R

Request

An order for change. Analysts with the appropriate security rights can allocate new requests for completion. Requests can be logged for any workflow process used by the organization.

Request Action Type

A brief description of the activity the history item is recording, such as Email Sent or Letter Attached. Request action types can be system or analyst defined.

Request Co-ordinator

This is the person who manages requests which they have logged. The request coordinator also has the authority to access and update the requests owned by other analysts.

Request Custom Profile

Fields that you can define to allow analysts to add more organization-specific information

Request Manager

A request manager has full responsibility over a request. They can update, change and monitor the request, and will receive any escalations for delayed tasks and approvals. This security is set in the Requests tab of the Workflow Management Security Role.

Request Type

The request type indicates the nature of the request being logged, and is used for reporting purposes.

Requestor

The user logging a request, or analyst raising one on their behalf.

RFC

A formal proposal for a change to be made. An RFC includes details of the proposed change and may be recorded on paper or electronically.



S

SACM

Service Asset and Configuration Management - a core process for effective IT service management

SAM

Service Assurance Manager. An organization uses Service Assurance Manager (SAM) to discover resources in its organization's networks and monitor its day-to-day operation.

SCCM

System Center Configuration Manager

SCOM

System Center Operations Manager

Screen Set

A standard set of screens for each entity type in vFire Core.

Security Profile

A method of controlling analysts' access to objects, actions and solutions, notes, emails, letters, CMDB items and timesheet entries for different entities in vFire Core. Security profiles are given access to these items. Analysts are then assigned appropriate security profiles in their Person Details.

Self Service Portal

See vFire Self Service

Service

The core services provided by an IT department such as Email, Network, Internet, or Printing. A Service can comprise many Service Actions and/or Bundles.

Service Action

The actions relating to a particular aspect of the Service being offered by the organization. A Service Action is always a component of a Service. For example, for the Email service, you might add Service Actions for Create Email Account, and Backup Email Data.

Service Bundle

A group of service actions from multiple services in your Service Portfolio. Service bundles are designed to meet more complex business requests made by users.



Service Catalog

The Service Catalog consists of the services currently available to users to order.

Service Desk Form

Analysts can use Service Desk forms to record additional information about an entity.

Service Portfolio

Organizations define their IPK and Workflow Management operations in terms of a set of services designed to support one or more business process. This set of services is known as the Service Portfolio. Examples of the services included in the Service Portfolio include Email, Application Support, and Information Backup.

SLA

Service Level Agreement. Agreements between a service provider and its customers who use those services. SLAs are applicable to both calls and requests; however, not to component workflow.

SLM

Service Level Management

SMS

Microsoft System Management Server

SMTP

Simple Mail Transfer Protocol

Software Product

Software Product and Inventory. A CMDB entity used to manage your software licenses and bulk inventory items which you do not wish to track individually (these entities are described in detail within the section on Managing Your Assets)

SSL

Secure Socket Layer

Stakeholder

A person, organization, other analyst or group with an interest in a call, request, task, agreement, CMDB item or location. The stakeholder may not be the originator of the call, request, or task, but may be related to it or a configuration item involved, and need to be kept informed of developments.

Stored Procedures

Programs precompiled by Alemba that can be used to configure your system



Structure

Structures enable items within the CMDB to be grouped together for easier searching and referencing. A structure is a special type of CMDB entity. It does not represent an actual piece of hardware, software or documentation, but it used to point to a collection of related CMDB items. Structures can also be used to refer to physical locations such as server rooms, or conceptual groups such as printers.

Subscriber

Users or organizations who may request services through vFire Self Service

Synonym

A word that has the same or similar meaning as another word, for example, “intelligent” and “smart” are synonyms.

System Source

Whenever a call, request or task is logged, vFire Core makes a record of how it came into the system, such as through vFire Self Service or an API transaction. This information is the System Source.

T

Task

A task is an activity that can be performed within a workflow. Tasks can be created within a request and forwarded to other analysts for completion or deferred until required. When all the tasks in a request are completed, the request can be closed.

Task Assignee

The analyst or group to which a task is assigned

Task Custom Profile

Fields that you can define in the Designer to allow analysts to add more organization-specific information.

Task phase

Task phases represent the various stages of a task at a given point in time. The task phase can be set on the Task Details window.

Task priority

Task priorities can be selected from the Priority list on the Task Details window to indicate how urgent the task is. They are defined in the Workflow Management section of the System Administration menu.



Template

A pre-built call details window with predefined field values

Thresholds

Thresholds define the points at which an agreement should start escalation events, and the point at which an agreement is breached. Thresholds are based on matrices, which are defined by your administrator.

Transaction

A transaction is an action you can perform on a Software Product or Inventory CMDB item, such as a new order or new purchase, allocation, or reservation of a quantity of licenses or inventory items.

U

UC

Underpinning Contract. An agreement between a service provider and the external contact who provide additional services or support to the service provider. UCs are applicable to calls, tasks, and approvals.

User

A person or contact requiring support or end recipient of any services that are requested. A user may be internal IT staff, other company staff or an external client.

V

vFire Core

The application-based interface, used by analysts

vFire Self Service

The portal by which end users log and track calls and requests, and order from the service catalog.

W

WCF

Windows Communication Foundation. WCF allows services to be defined abstractly and published physically over a wide variety of channels, and extensive tailoring of this behavior by updating the appropriate .NET configuration files.



Workflow Process

The workflow process is an ITIL process used by the organization in their everyday operations. Examples of workflow processes include Workflow Management, Availability Management and Release Management.

Workflow Template

The workflow template is a predefined request structure that already includes the necessary tasks and approvals to create a request. Workflow templates can be used for those requests that occur regularly, with little or no change to the basic details.

WSRP Portal

Sharepoint portal