Bringing a new team or service-desk on-board to HP Service Manager

Greg Baker (gregb@ifost.org.au)

Version 1.2, 16th April 2014

This docmuent is a random list of notes of things to think about or do if a team is going to start using HP Service Manager. It is collated from feedback I have received in delivering training and doing consulting work. These are the "I wish someone had told me this earlier" comments. Let me know if you nd it useful or think that Ive missed something. Sales pitch: I do a lot of e-learning development, which is often the most efcient way of getting new staff trained.

Create a list of incident handling groups What teams do you have at the moment? What do they do?

Create a list of knowledge article categories You currently have documents somewhere that help your support staff do their jobs. Do you have several different repositories? Or just one per application? Who is allowed to modify them? Who is allowed to read them?

Create a list of user profiles What different roles do your staff do? Each user can have only one user profile, so you might need several profiles. Things to consider in making these user profiles:

- *Incident role.* Can people with this user profile allocate tickets to other people, and pick things out of the queue for themselves to work on (either makes them an incident coordinator)? Or are all tickets given to them (incident analyst)?
- *Change roles.* Do they record changes? Do they review changes? Do they recommend changes?

- What incident handling group are they in?
- Can people with this user profile publish knowledge articles? Or can they only author them (so that someone else has to publish them)? Or do they have no rights to write anything?

Create a list of staff in your team Assign each a user profile. Create a spreadsheet of these or keep it in some convenient format which will be easy to load later.

Create a list of things which you support These will be *bizservice configuration items* – these can be chosen as the "Affected Service". What is the escalation path for these things? Which teams will get involved and when?

Define the service level objectives

Create a list of the top 10 common incidents These are the ones that you want the service desk to be able to deal with quickly. These will often turn into templates. For each one of these, make sure there is a procedure for handling them. Usually knowledge articles are appropriate here.

Create knowledge articles Create them about anything and everything that you want the service desk (level 1s) to deal with. You might find this easier if youve been on training first. Create some more articles for your level 2 staff for all the procedures you want to follow.

Create your Service Catalogue items Come up with as many common changes and requests as you can. Each thing that you are asked for is going to have:

- Information that needs to be collected when the user calls or requests this thing.
- Approvals that need to be given
- Tasks that need performing (and who is going to do them).

Create your configuration item database You have a list of things (Software modules? Computers? Printers?) which you support. Do you need to be able to report on the incidents and changes done to these things? (If you dont, just ignore this stanza.)

- How are you going to initially import these lists of things?

- How are you going to keep it maintained? Are you receiving a feed from another application? Are you receiving a feed from several applications? If so, how are you going to reconcile differences?
- What attributes are you going to maintain?
- Do you have baselines that these things should conform to?
- Are you going to audit?
- Are there any business service configuration items?
- What are you going to do with these incident and change analysis reports?

The last two weeks before a Service Manager roll-out are the most crucial and busy time for training staff. The bulk of what will be required for a is expressed in table 1 on page 4.

Some assumptions:

- Team leaders and managers (who might not necessarily use ServiceManager themselves for much other than approvals and reporting) will still want training along with their staff so that they know what is going on.
- Release control, configuration management, integrations, development and general system administration will be done by small teams. They would usually attend longer, more in-depth classes.

	Service Desk	Level 2 / 3 Techs	Knowled management team	Regional support staff	Change management team
Creating dashboards and views. Navigation. Alt-F9 and filling. **Approx 30min**	✓	✓	✓	✓	✓
Logging and closing interactions. Using existing knowl edge articles. **Approx 1hr**	✓	✗	✗	✗	✗
Understanding the incident workflow; updating and closing incidents. Searching and creating views. Using the mobility client for incidents. **Approx 3hrs**	✓	✓	✗	✓	✗
Writing knowledge articles, the knowledge document workflow **Approx 1hr**	✗	✓	✓	✗	✗
Change: normal, standard and service catalogue changes. Delegating and performing tasks. Using the mobility client for change. **Approx 3hrs**	✗	✓	✗	✗	✓
Problem management: creating, managing and closing problems; creating, managing and closing known errors. **Approx 1hr**	✗	✓	✗	✗	✗

Table 1: Standard Training Matrix