



Service Portfolio Guide

Terminology:

Inventory: The term Inventory is synonymous with CI (Configuration Item) and Asset. Where this document refers to Inventory, you may find your SupportDesk system refers to CIs or Assets. The terminology used depends on the configuration of your SupportDesk system and can be edited in the Settings according to your preference.

ITIL: The IT Infrastructure Library is a set of best practices developed by the UK Office of Government Commerce. SupportDesk is ITIL-compatible.

Service lifecycle: Refers to the ITIL concept that all CIs go through a logical lifecycle. For more information, refer to the relevant ITIL documentation.

Service Owner: ITIL concept that each service must have an owner who is ultimately responsible for its delivery.

Use SupportDesk’s Service Portfolio to describe the Services you provide to your customer-base– such as the provision of email accounts, specialised software packages or internet access. You can then maintain the operational status of these Services so that their state is available to all interested users of the system.

Web:

Service	Type	Op Status	Description	Live in Catalog
Hosted Email Service	Business	Offline	Hosted Email system provided for customers	Live
Cloud Accounting	Business	Impacted	Hosted accounting service for managing business accounts	Live
Service Desk	Business	Online	Tracking and working through IT support issues	Live
Intranet	Business	Offline	To access all the items on the company intranet	Live
Network Printers/Copiers	Business	Impacted	Network of printers from buildings A - D	Live
Remote-Connect	Business	Impacted	Software tool for remote access	Live
Shipping Services	-	Online	For the transportation of goods	-

Figure 1: Service Summary form

Services

Hosted Email Service	Offline
Intranet	Offline
Cloud Accounting	Impacted <small>Cloud Accounting is currently offline for legislative updates.</small>
Network Printers/Copiers	Impacted
Shipping Services	Impacted

Figure 2: Service Updates

Windows:

Service	Op Status	Description	Live in Catalog
Email	Online	Company Email system.	Live
Accounts System	Offline		Live
IP Phone system	Impacted		Live
SupportDesk Web UI			

Figure 1: Service Summary form

Service	Status
Accounts System	Offline
Email	Online
IP Phone system	Impacted

Figure 2: Service Updates



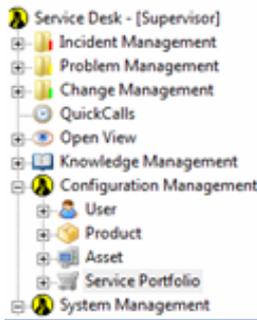


Figure 3: Service Portfolio select

You can maintain Services through the **Service Portfolio** menu option, which is under **Configuration Management** in both the Windows UI (left) and the Web UI (right). You must have Supervisor rights to maintain the Service Portfolio.

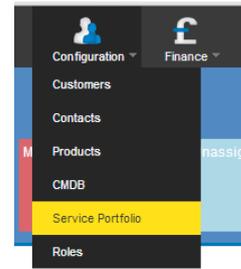


Figure 4: Service Portfolio select (Web)

The main maintenance form for the Services is shown next with an explanation of the use of the fields and settings. The interaction of other areas of SupportDesk is then described. Functionality described here is also available in the Windows UI of SupportDesk.

Figure 5: Service Details

Taking each field on this part of the form:

- **Service:** A meaningful name for the service.
- **Type:** This is a self-populating drop-down that defines the types of Services. Typical examples would be Technical or Business. The types here are not related to types in Service Level Management.
- **Status:** This field is used to denote each service's stage in the *service lifecycle*. This is not related to the Status codes in Service Level Management but is a self populating drop-down. Recommended values are 'Pipeline', 'Live' and 'Retired'.
- **Op. Status:** This describes the Operational Status of the Service and should ideally be one of three values — 'Online', 'Offline' and 'Impacted'. SupportDesk will respond to values by displaying the service name in 'traffic light' colouring at the main window and in the Service Updates panel:

Online = Green

Offline = Red

Impacted = Yellow

Note: If you have setup parent/child relationships between services and inventory, setting a *child inventory item* as impacted or offline will result in the parent service being marked as Impacted automatically.

- Description:** A description of the Service.
- Date:** Indicates when the entry is made.
- Live in Catalog:** Services that do not have this ticked are not yet 'live' in the *Service Catalog*. Only 'live' Services may be selected in the Service dropdown in a call form.
- Incident Impact:** Automate the selection of the impact on an Incident for this service. It is generally advisable to leave this blank.
- Cost per _:** May be used to record the internal cost of providing the service.
- Price per _:** May be used to record the external price of providing the service.
- Start Date:** May be used to record the start date of the service.
- Expiry Date:** May be used to record the end date of the service (if applicable).
- Internal:** If set to Internal, this service will not appear in the WebGuest Self-Service interface.
- Archived:** Once set, the Service will be archived and removed from the live table.
- Show in Service Updates:** Many services may be created but only those that have this box ticked will show in the Service Updates panel.
- Assignee:** When this service is selected, calls are automatically assigned to the login referenced here.
- Email:** Typically the email address of the *Service Owner*.
- Website:** A Website URL that should ideally point to information about the service.
- Folders:** Dictates the Folders where the service will be available on the Call form.

One of the most important aspects of the Service Portfolio is to set the subscribers. This is managed through the Subscribers link:

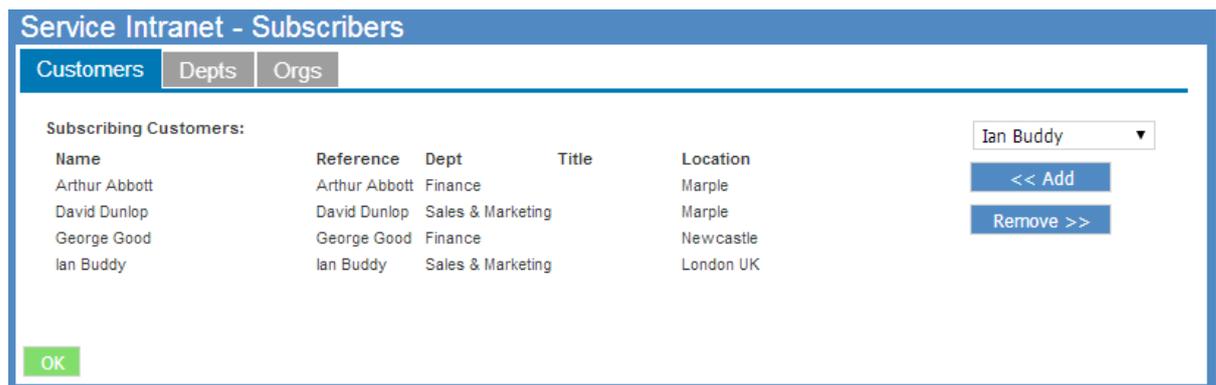


Figure 6: Service Portfolio Subscribers

You can add Subscribers individually by selecting from the drop-down list and clicking **Add**. You can also add Orgs and whole departments with the associated tabs.

Web:

Customer Details

Attachments Incidents Contacts Contracts

Name: Arthur Abbott

Reference: Arthur Abbott

Dept: Finance

Region:

Location: Marple

Level:

Org:

Windows:

new-accounts-user User Details...

Details Attachments Extra Fields Search Related Calls

Name: new-accounts-user

Reference: nac

Org. Unit: Accounts Users

Location:

Figure 7: Customer Details

If included as a subscriber to a Service by virtue of their Department or name, the Operational Status of that Service will be displayed on the Service Updates panel on the SupportDesk today page. The Service will also be available on the call screen when logging a call for that user.

It is also possible, through this main form, to specify the Child Inventories that are associated with the Service. Clicking on the Assoc CIs link shows this form:

Service Cloud Accounting - Associated CIs

Associated CIs: HHS0077 -- Parallels Virtual Platform

Id	Customer	Product	Type	Location	Op. Status
HHS0023	Christine Carter	LIFEBOOK AH531	Computer		In Use
HHS0077	Enid Eccles	Parallels Virtual Platform	Computer		In Use

<< Add Remove >>

OK

Figure 8: Service Details Associated CIs

In this example, you can see that the Email Server has been associated with the Mail Service.

This association ripples through the system and can be seen in various areas. The first area is on the actual Asset Summary, where the Operational Status is also indicated using the traffic light system if the same Operational Status codes are used.

Config. Item Summary

Search Add a New Config. Item Choose Fields View Archived Export QuickCalls! Calendar Print

Id	Customer	Product	Serial#	Asset#
Barry Baxter-PC	Barry Baxter	HP Compaq 6730b	CNU9441Z5U	Barry Baxter-PC
HHS0023	Christine Carter	LIFEBOOK AH531	YLDN15882	HHS0023
HHS0077	Enid Eccles	Parallels Virtual Platform	-	HHS0077
HHS0083	Arthur Abbott	HP 620	CNU0312V4B	HHS0083
HP SYSTEMS	-	HP 620	-	-

Figure 9: Asset Summary

Drilling down on the asset reveals more details and also the Op. Status drop-down (see next). It is important to note that if a child CI is marked as Offline **or** Impacted the parent Service's Op. Status will be marked as Impacted.

Config Item Details

Diagram Attachments Extra Fields Incidents Search & Link Tasks KnowledgeBase Changes Configuration Licenced Software Print

Id:* Barry Baxter-PC Scan Date: 08/01/2013 Archive

Customer: Barry Baxter #: 48827 Primary

Product: HP Compaq 6730b SNMP Enabled

Type: Computer ETA: Op. Status: Online

Figure 10: Asset Details

You can also see the Associated Services from the Child Inventory using the Assoc. Services tab.

mikecharles Mike-Email Server -- Email Server Asset Details...

System Info... Take Control... Ping...

Details Attachments Extra Fields Search Related Calls Search & Link CIs Assoc. Services

Service	Type	Op.Status	Description
Email	Business Type	Online	Company Email system.

Figure 11: Asset Associated Service

There is also available, on the Web, a graphical representation of links to CIs via the Diagram tab on the CI record:

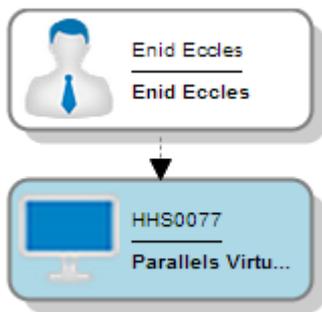


Figure 12: Asset Associated User

The final area of interaction between Services and the rest of SupportDesk is incident logging. If configured to allow it, the Service can now be offered on the call form:

Incident Details IM000004 New Linked Problem New Linked Change Add to KBBase Hot Incident Sales Opportunity

Attachments Extra Fields Search & Link KBBase Config Item Analysis Changes Print

Reference: IM000004 Type: Software Date: 06/01/2013

Customer: George Good Sub-Type: E-Mail Time: 12:44

Phone No: 265 Status: Active Elapse Time: 3245h22m

E-Mail: george.good@houseonthehill.com Impact: Major Close Date:

Dept: Finance Urgency: High Close Time:

Location: Newcastle Priority: 2_High Response Date: 06/01/2013

Subject:* Cannot access email - laptop hangs and Outlook needs to be restarted. Response Time: 13:54

Service: Hosted Email Service Group: First_Line_Support Warning Date: 06/01/2013

Config. Item: HHS0077 -- Parallels Virtual Platfon Assignee: Jim Technician Warning Time: 17:44

Solution:* Fx Date: 07/01/2013

Owner: Supervisor Fx Time: 11:14

FTF

Caused By:

Figure 12: Call Details

The usual rules of filtering are applied to the call once the User is selected; that is, if configured as such, only the user's Inventory is shown in the drop-down list. Filtering is also applied, however, to the Service so that the only Services shown will be those to which the user is a subscriber. Once the Service is selected, a secondary filter is applied to the Asset so that only the associated Inventory of that Service is shown. If you wish to change immediately the Operational Status of the Service as a result of the call being logged, you can simply drill down to the Service and change the Op. Status accordingly.