ITIL Success with TriActive

Executive Summary

ITIL **(Information Technology Infrastructure Library)** is a best practice framework for managing IT services. ITIL provides guidelines on the full management of the IT infrastructure (hardware, software, applications) processes, procedures, documentation, and relationships necessary to deliver high quality service that support and enable the company's business objectives. TriActive solutions are secure multi-tenant solutions that provide a global, single location to store, take action on, and report on this information.

Incident Management

Incident Creation & Service Requests

End users can create and track service requests and incidents via a number of methods. TriActive provides the ability to submit, update, and view tickets using a Web browser, self-service portal, or through e-mail submissions. Once entered, the customers or users can track the status of their requests on an ongoing basis. Service desk personnel are provided an interface (Web portal) for incident management and field technicians are provided an easily accessible Web or e-mail interface. End users also have a self-service portal (Customer Service Center/CSC), Web portal, or e-mail interface. *Click here* to view a short video on the Customer Service Center.

TriActive provides a workflow engine that allows managers/specialists to define approval workflows that allow approvals to be done via email.

Key Benefits
· Complete integration into all TriActive services
· Schedule daily/weekly/monthly reports
· Free weekly training on administration and usage
· Customizable tickets
· Customizable dashboard per specialist
· End user and specialist templates
· Ticket auto assignment
· Escalation rules
· Service calendars
· Approval workflow
· Multi-question end user surveys
· Knowledge Base
· Customer self service (With multi language support)
· Emergency bulletins
· Complete email integration
· Web based Remote control and remote tools
· Easy to use built in reporting engine
· SLA and KPI reporting
· Matrix/trend reporting
· Detailed ticket tracking

Incident Escalation

With TriActive, an administrator may predefine incident categories, priorities, and Service Level Agreements (SLA) for automatic technician or workgroup assignment as well as automatic escalation rules. Escalations can be done by either automatically changing priorities, sending additional specialist notifications, or new notifications sent to the specialist's manager.

Incident Management/Notifications

With role-based access, a manager can control a specialist's ability to view, create, modify, and close tickets. Tickets can be assigned CC: groups so that managers can be kept informed throughout a ticket's lifecycle. Email integration allows communication with parties outside of the company (i.e. vendors, external customers). All communication is automatically tracked via the ticket work history.

Tickets can be posted as emergency bulletins to the CSC for immediate notification of outages or major changes. Duplicate or similar incidents may be linked as a parent to child(ren). This allows specialists to work one ticket, and the work and solutions automatically get copied to all children tickets. As parents are closed, all children are closed and the user's of all tickets are notified accordingly. *Click here* to view a short video on working with related tickets.

Incident Resolution & End-user Education

TriActive allows you import or create a robust knowledge base for your specialists to quickly find solutions as well as workarounds to known issues. These KB articles can be used as solutions, explanations, or resolutions to incidents and are included in the notifications sent to the end users when their tickets are closed. Specialists can also post top KB articles to the CSC to notify and provide solutions to users on common issues to reduce inbound requests.
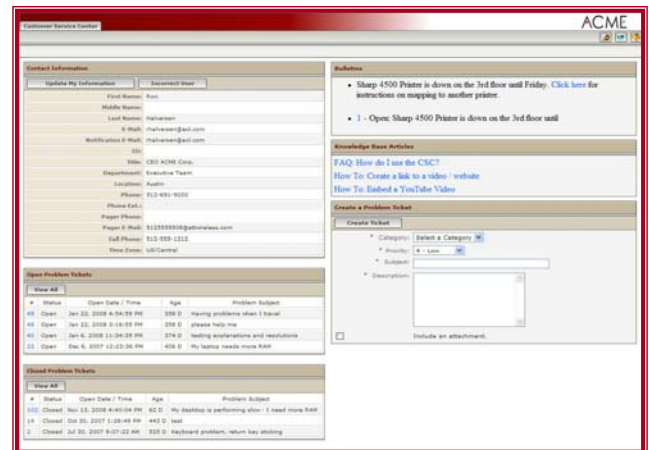
Change/Release Management

Change & Release Management

Not only does TriActive provide you with the tracking and reporting of changes/releases, but integrates the software distribution engine to allow you to deliver the changes to assets, both LAN-based and remote. You can submit and track changes end-to-end, as well as maintain continuity of incidents that initiate the change process. All of the information regarding the change is logged in an audit trail, included in each ticket, including the request, approvals, tasks, work history, attachments (i.e. back-out plans), and notifications. *Click here* to view a Change Request PPT presentation.

TriActive also provides bulk management capabilities for tickets (change assignee, set parent-child, edit work history, change status). One example of bulk edit: A company with round-the-clock service desk. Technicians at the end of their shift can click their open high-priority tickets and re-assign them all to the after-hours queue.

Problem Management

Creating Problem Tickets

You have the ability to create and track problems tickets. Your specialists can associate a ticket to the problem as well as assigning to IT assets. Tickets can also be linked in a parent-child relation for duplicate issues and related incidents/tickets. This greatly reduces the time an IT staff wastes on re-working the same issue by facilitating active communication and updates between the linked tickets.

Your problem managers can also assign tasks to multiple workers and workgroups as necessary when identifying a root cause and tracking it all in one ticket. These solutions/resolutions can then be saved to the knowledge base and/or posted to the CSC.

Configuration Management

Discovering Assets

TriActive has a built-in discovery and deployment tool to quickly identify and manage assets that are added to your environment. Your specialists have the capability to manually discover assets or schedule asset discoveries to constantly maintain an accurate account of assets in your environment, as well as all your remote locations. TriActive also allows you to enter or import "fixed" assets (projectors, monitors, etc.) for tracking purposes.

To further increase IT visibility and improve efficiency, end users are automatically given the opportunity to assign their asset/computer to themselves when they enter the CSC for the first time. This means that for every ticket created after that, the end-user's asset information is already included in the ticket. This includes detailed asset information, sub-assets, financial and vendor records, associated tickets, missing patches, installed software, monitoring, and hardware/software changes.

Fixed Assets

The fixed asset repository allows you to track anything from monitors, PDAs, projectors, to configuration items such as: server farms, developer machines, mail servers, etc.   Assigning sub-assets to configuration items allows you to view dependencies on affected systems.

Hardware/Software Changes

TriActive constantly monitors changes to both hardware and software on all reported assets. You can view when and what has been added, modified, or removed so you always have current information as well as a change history.   This is automatically done for each asset, but global hardware and software change reports are also available (see the reporting section). This information is linked to the asset and automatically displayed in the ticket with each associated asset.   *Click here* to view a short video on hardware/software change history.

Information Management

Reporting

TriActive's multi-tenant SaaS powered solutions all benefit from the complete integration of all information. This means that everything from asset information, tickets, change requests/release, approvals, SLA metrics, KB articles, bulletins, etc. are all available to both the technicians actively working tickets and managers measuring performance and auditing processes. For achieving and maintaining ITIL compliance, TriActive's reporting engine provides you the proactive ability to manage your IT infrastructure, people, and processes.
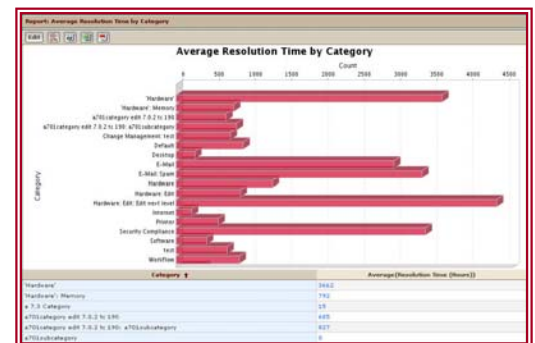
TriActive provides a customizable dashboard for each technician and manager. This allows each person to view only the most pertinent information for their role and job function. You can also create your own customized reports (for example: adding SLA deadline column to 'My Tickets') and set those as the default landing pages for tabs within the console.   All this is to help personalize and improve productivity. *Click here* to view a short video on customizing your own help desk tab.

Scheduled Reports

TriActive provides the ability for technicians and managers to schedule report runs. While technicians and managers view dashboards and reports live, this provides the ability to export key information to PDF, Excel, and CSV report formats and automate the delivery to a person or group of persons. This automates the communication to senior management and external partners/customers of SLA/KPI information while giving you complete control over what and when that information is shared.

Scheduled reports greatly improve efficiency in many areas. A few examples might be: weekly team reviews, CAB meetings, monthly trend reports, quarterly business reviews, annual employee performance evaluations, as well as software true-up and renewals.

Service Level Management

Managers have the ability to track service levels on virtually all of the information in your tickets. This includes things like measuring first call resolution by category, technician, priority, workgroup, etc. SLA metrics are integrated into the ticket itself so that technicians can see, both by time and graphically, what the SLA initial response time is, how much time is left, when it's expected to be resolved by, and more. SLA reports allow managers to measure the efficiency of their teams and an automated end--user survey mechanism integrates customer satisfaction scores so they can measure performance.

TriActive's reporting engine allows you to report on or leverage any ticket attribute for metric reporting. This makes it easy to report on which technicians are meeting their SLA, what types of tickets are being escalated, how many tickets can my team process, what does the trend of tickets throughout the day look like, what are the hot topics, and more. This provides invaluable information to management to know where to assign either more work (i.e. new KB articles) or more resources (new server, additional technicians). Part of ITIL is to continuously strive to reduce your mean time to resolution (MTTR). _Click here_ to view a short video on SLA reporting.

The administrator controls what constitutes the SLA times (initial response, resolution). Workers cannot simply pass a ticket to meet the initial SLA. Also, closing and re-opening a ticket will not reset the SLA.

Identifying Problems & Trends

As a problem manager, you can isolate and search for ticket trends, problem categories, problematic devices, both proactively and historically. This helps you prevent outages, improve

your knowledge base, assess the scope and impact of issues, in the continuous quest to improve service and reduce response times.

	Ticket #	SLA	Status	Open Date	Age	Priority ↑	Category	Assignee	Subject	Parent Ticket
☐	5260		Open	Jul 22, 2009 11:33 AM	8 M	1	Desktop	rhalversen	My laptop hard drive crashed	
☐	175		Open	Aug 18, 2006 2:38 PM	1068 D	3	E-Mail	rhalversen	testing pri 3	
☐	177		Open	Aug 18, 2006 3:30 PM	1068 D	3	E-Mail	rhalversen	testing pri 3 with new calendar	
☐	1381		Open	Nov 16, 2006 5:30 PM	978 D	3	E-Mail	rhalversen	testing without workflow	
☐	3539		Open	Sep 19, 2007 11:40 AM	672 D	3	E-Mail	rhalversen	testing pri 3	
☐	5261		Open	Jul 22, 2009 11:35 AM	6 M	3	Printer	rhalversen	Sharp 4500 is down	
☐	172		Open	Aug 18, 2006 2:16 PM	1068 D	4	E-Mail	rhalversen	testing pri 4	
☐	4957		Open	Mar 3, 2009 1:48 PM	140 D	4	E-Mail	rhalversen	This is to demonstrate Send E-Mail option	
☐	4963		Open	Mar 3, 2009 3:41 PM	140 D	4	E-Mail	rhalversen	testing e-mail notifications	5202
☐	5259		Open	Jul 22, 2009 11:32 AM	9 M	4	Internet	rhalversen	My VPN hangs in a VMWare session from home	
☐	5262		Open	Jul 22, 2009 11:36 AM	6 M	4	Printer	rhalversen	I can't print? Somethings wrong	5261
☐	5263		Open	Jul 22, 2009 11:37 AM	5 M	4	Printer	rhalversen	the printer is broken again	5261

Tracking Change Release - Hardware/Software Audits

Assets are automatically tracked in your company database. You have immediate access to detailed hardware and software inventory of your assets as well as the ability to track software usage, software additions and removals, as well as complete hardware change history.   You will be able to identify unauthorized changes in your environment both by asset and globally.

TriActive's provides the ability to report on any software/hardware changes that have occurred in your environment for any specific amount of time (i.e. all software changes in the last 24 hours).

Documentation Library

Integrated into the service desk is a robust knowledge base engine. You can create customized (HTML graphics, links, etc.) articles that are automatically indexed into the database for easy searching by technicians working issues looking for resolutions. You can link virtually anything into an article such as: documents, videos, policies, web pages, photos, etc. Technicians can easily search and single-click select a KB article as the solution to closing a ticket. This embeds the article as the solution in the notification to the end user. KB articles can also be published proactively to the CSC to help educate your end users and reduce inbound ticket requests.

Conclusion

ITIL compliance is a journey, not a destination. It takes many months and sometimes years to achieve. Many times companies will never be "fully ITIL compliant" because some ITIL best practices may not make sense for their business. TriActive is very engaged with our customers, and focus our development and training on those features and capabilities that are the most practical to support your core business.

TriActive's solutions provide the framework needed for users, technicians, and managers to perform at a high level of efficiency by bringing together all the information and tools needed to manage your IT infrastructure and exceed your SLA and KPI expectations.