



SERENA SOFTWARE

Requiring Incident Verification After Problem Resolution in Serena Service Manager

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Table of Contents

Overview	3
Requiring Incident Verification After Problem Resolution	3

Overview

In Serena Service Manager, a service interruption, which is known as an incident, may lead to a problem being posted. The purpose of opening the problem ticket is to address the root cause of the incident. The problem is managed in a separate problem management workflow. Once the problem is resolved, Service Manager automatically closes the linked incident.

This default configuration of Service Manager may not match your IT processes, which may require that an IT operator verifies that the resolution to the problem addresses the original incident. The modification described in this tutorial allows the incident management staff to verify that the resolution of the problem does actually address the original incident. When the problem does address the incident, then the operator can close the incident. When the problem's resolution failed to address the incident, the operator can re-open the incident, returning it to the investigation state for analysis.

This tutorial explains the necessary steps to modify the default Service Manager process apps to add this verification step. To perform this modification, you must have the necessary permissions to modify the Incident Management and Problem Management process apps.

Requiring Incident Verification After Problem Resolution

The following sections describe the steps that must be performed in the Incident Management and Problem Management process apps.

IN INCIDENT MANAGEMENT

The Incident Management application must be modified to create a holding state for incidents after the linked problems are closed. The incidents remain in the holding state until the incident operator has time to verify that the problem's resolution addressed the incident.

The following steps describe how to add the state and necessary transitions:

1. Open the *SSM - Incident Management* process app in SBM Composer.
2. Add a new form by selecting **Pending RFC** and choosing **Duplicate** from the right-click menu.
 - Name the form **Problem Diagnosed**.
 - Select the two transition controls on the left and delete the behaviours associated with them. The behaviours are the two main transitions associated with the Pending RFC state.
3. Select the Incidents workflow under **Workflow Design**.
4. Add an **Active** state by dragging it from the Workflow Palette onto the Incident Operator swimlane:
 - Name the state **Problem Diagnosed**.
 - Mark the owner as **Level 1 Technician**.
 - Choose the **Problem Diagnosed** form.
5. Add a **Quick** transition from the **Any** state to the **Problem Diagnosed** state.
6. Add a regular transition from the **Problem Diagnosed** state to **Resolved**.
 - Name the transition **Resolve**.
 - Choose the **Resolve From Investigation** form.

7. Add a regular transition from **Problem Diagnosed** state to **Classification and Diagnosis**.
 - Name the transition **Reopen**.
 - Choose the **Re-Open** form.
8. Modify the transition buttons on the **Problem Diagnosed** state form.
 - a. Open the **Problem Diagnosed** state form under **Visual Design**.
 - b. Select the first transition control on the right side of the form. It is the first gray button with {transition name}.
 - c. On the **Behaviour** tab, delete any existing transitions (if you did not delete them in step 2.)
 - d. Click **Add**.
 - e. Choose the *Incidents Application* workflow, *Problem Diagnosed* state, and *Resolve* transition.
 - f. Repeat this procedure for the second transition control for the *Re-open* transition.
9. Deploy the updated Incident Management process app.

IN PROBLEM MANAGEMENT

The Problem Management application must be modified to trigger the transition of the incident to the holding state when the problem is resolved.

The following steps describe how to trigger the transition of the incident:

1. Open the *SSM - Problem Management* process app in SBM Composer.
2. Select the Change Management workflow under **Workflow Design**.
3. For each of the **Resolve** transitions, modify them to perform the **Problem Diagnosed** transition in the Incident Management process app:
 - a. Add a new action.
 - b. Select to perform a transition.
 - c. Select to affect **Referenced items in a relational field**.
 - d. Choose **Related Incidents** as the relational field.
 - e. Choose to perform the action unconditionally.
 - f. Select the **Incidents:Transition ([Any]->Problem Diagnosed)**.
4. Deploy Problem Management.

ABOUT

Serena Software, the Change Governance leader, helps more than 15,000 organizations around the world—including 96 of the Fortune 100 and 90 of the Global 100—turn change into a business advantage. Serena is headquartered in Redwood City, California, and has offices throughout the U.S., Europe, and Asia Pacific.

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