

Service model management



The following tasks require administrative privileges.

Log into IthelpCenter portal. In the main menu select *Configuración del proceso > Modelo > Editar*

The screenshot shows the IT-Help-Center portal interface. On the left is a dark sidebar menu with options like 'Positions/Jobs', 'Model', 'SLA Management', and 'Tools'. The top navigation bar features the 'LeverIT' logo and the user 'ADMINISTRATOR'. The main content area is titled 'Process Setup | Model | Edit' and contains a table of models. A right-hand menu is open, showing actions like 'Add', 'Edit', 'View', 'Delete', 'Graph', 'Copy', and 'Repair'. The table below shows the following data:

Id MD mod...	Title model	Comments model
1	General Incident	The main objective is to return service ...
3	General Problem	The main objective is to quickly provid...
5	General Request Fulfillment	The main objective is the efficient and ...
2	Major Incident	The main objective is to return service ...
4	Major Problem	The main objective is to quickly provid...
6	Request for Change Normal	A Normal Change Request is a formal ...

Tools for model creation/editing



Model creation



Edit model



View



Delete model



Graph model and levels



Copy model



Repair model

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Creation of a model

1. Click on the button for model creation.
In the edit window enter:

Select and complete model configuration

Title	Model name.
Comments	General comments on function/characteristics of the model.
Service type	<p>In the drop-down field select the type of service to which the model will apply. Types:</p> <div style="border: 1px solid gray; padding: 5px; background-color: #f0f0f0;"> <p>Incident Problem Workaround known errors Activity Request fulfillment Request for Change</p> </div>
Normal time	<p>Average time in minutes for the attention of requests related to the model. Value can be defined as -1 so that the normal time value of the SLA is set</p>
Max. time	<p>Maximum time in total minutes to solve the reported case. This value should be calculated taking into account the average service time and the average number of requests of the same type reported daily. Value can be defined as -1 so that the max. time value of the SLA is set</p>

Managers informed Hierarchical escalation	Select the hierarchical escalating group from the drop-down field.
Handler Functional escalation	Select the functional escalating group from the drop-down field.
Interface ID MD	Seleccionar en el listado el tipo de interfaz ¹⁾ que aplica al modelo. Utilizar Default si no existen interfaces.
MT ID AT Role	Select from the list the virtual role to apply to the model. Choose None if there're no virtual roles.
ET ID AT Role	Select from the list the virtual role to apply to the additional fields in the case creation form. Choose None if there're no virtual roles.
Possible returns	Define possible values to choose as a result of the case attention. Add values and press ENTER for each value. Change Approved, Rejected.
Guide	General instructions for the attention and solution of cases, taking into account the service and the steps contemplated in the model.

2. Click on **Accept** button to save the basic information of the model. The following tabs will be enabled:

Steps: To add steps to the model

Extra fields: Configuration of forms for case creation.

Add steps to the model

1. In the tab *Steps* click on the button 


Details tab

1. The *Details* tab containing the basic form for editing the step will be activated.

Complete the following information

Status	Step number in the list.
* Step name	Name the step. Example: Analysis, Solution, Solution validation
* Next step	Enter the number (status) of the next step in the process. For more than one step, separate by commas. It can define previous or next steps, depending on their position on the list.
Required Steps	Enter the number (status) of the step that is required before the current step.
Step settings	Enables advanced scheduling of automatic tasks at the step.
Comments	General comments on the step.
Caution / Warning	Additional step recommendations.
Voting	Allows to include surveys/voting in the step.
ID AT Role	Select from the list the virtual role to apply to the step. Choose None if there're no virtual roles.
* Step status	Select from the list the status that the case will have when it is in the step. Available options: In Progress: The case is in the attention and solving process. Paused: This function avoids exceeding the maximum time per SLA/Model. A case is manually changed to this status when during case attention, the advisor requires a result or response from users, groups or third parties to continue with the attention and solution of the case. Resolved: This status indicates that the case is resolved and it has been confirmed that the reported service(s) have been restored.

* Mandatory fields.

- Once the step configuration is completed, click on the button 
Follow the same procedure to add more steps to the model.

Details Activity User Type

✓

Status: Step name:

Next Step: Required steps:

Step settings: ...

Comments:

This step is aimed to understand the incident and find a solution as soon as possible so that the user can continue with their work. If the cause of the incident is found, the diagnosis and actions to be taken must be recorded. If there is a problem as an identified cause, create a new case corresponding to the problem. Or if requiered create a new request fullfilment record to implement the solution.

Caution:

Warning:

Voting:

Extra Options:

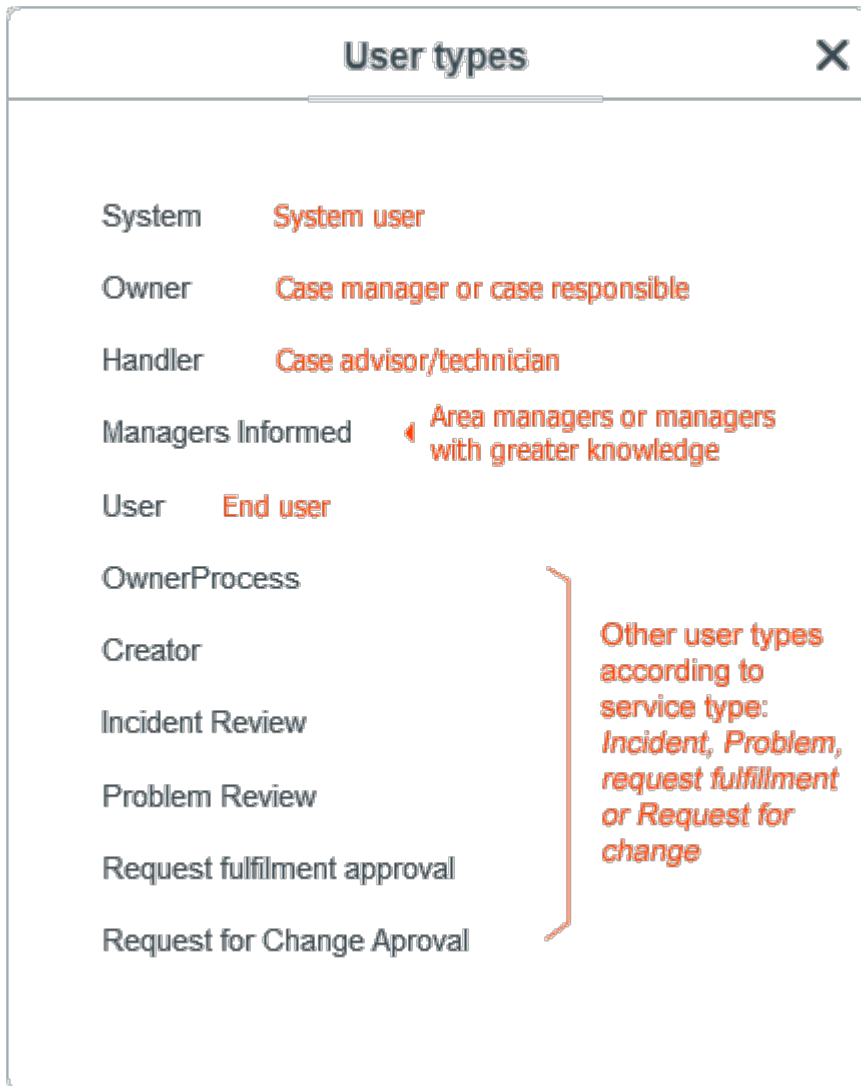
ID AT Role:

Step status:

User Type tab

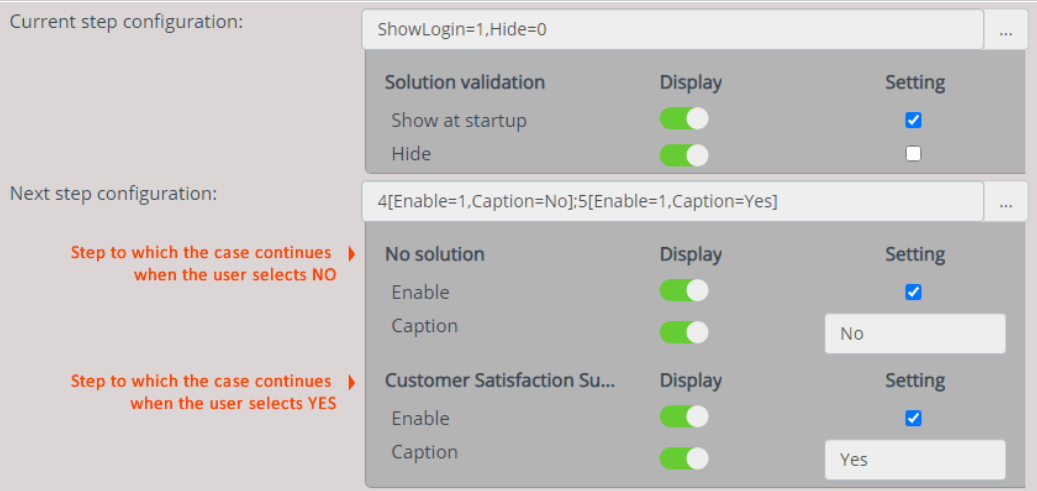
1. The creation of the step will also activate *User Type* tab, which allows configuring the model users.

Click on button  to select user type(s)




For each user complete the following information

<p>* Permission</p>	<p>Select in the field the viewing/editing privilege of the case assigned to the user type. Available options:</p> <p>Read:Enables case display Write:Enables viewing and editing of the case, enables case editing tools Disable</p>
<p>* Interface type</p>	<p>Select from the list the type of interface ²⁾ that applies to the user in the step. Choose <i>Default</i> in case there're no interfaces created.</p>
<p>Options</p>	<p>Enable Include all the group in case there's a voting configured for the step.</p>
<p>Notify to console</p>	<p>Select in the drop-down field the notification that will be sent to the console when the case is in this step.</p>
<p>Notify to email</p>	<p>Select in the drop-down field the notification template that will be sent to the email when the case is in this step.</p>

Behavior	<p>Allows you to select the display mode for the end-user. Available options:</p> <p>None: Default option, normal display of the case CSATSurvey Display of the user satisfaction survey</p>
Step summary	<p>When this checkbox is enabled, it will display this field to add a brief summary before proceeding to the next step. If enabled, in the text field enter the name that the field will have.</p>
Recommendations	<p>When this checkbox is enabled, it will display this field to add comments/recommendations before proceeding to the next step. If enabled, in the text field enter the name that the field will have.</p>
Comments	<p>Allows additional questions to be sent to the end-user to validate case information and change steps.</p>
Current step configuration	<p>Allows to display the question defined in the <i>Comments</i> field when the end-user logs in the ITHC console.</p>
Next step configuration	<p>Allows to configure the step at which the case will continue according to the response and options defined in <i>Comments</i> and <i>Actual step configuration</i>.</p>  <p>The screenshot shows the 'Next step configuration' interface. It includes a 'Current step configuration' section with a text field containing 'ShowLogin=1,Hide=0' and a 'Next step configuration' section with a text field containing '4[Enable=1,Caption=No];5[Enable=1,Caption=Yes]'. Below these are two tables of settings for 'No solution' and 'Customer Satisfaction Su...'. Each table has columns for 'Display' (with a toggle switch) and 'Setting' (with a checkbox and a text input field).</p>
Voting view	<p>Allows to configure voting/survey in the step.</p>
ID AT Role	<p>Select from the list the virtual role to apply to the step according to the user type. Choose None if there're no virtual roles.</p>

* Mandatory fields.

2. Once the step configuration is completed, click on the button 
 Repeat the same steps with each type of user added to the step.

Details Activity **User Type**

Select the user type for this step

User type	Available groups
User	1
Owner	1
Handler	3

General **Service Type Attribute** Define CI Attribute

✓

Permission:

Interface Type:

Pause Time Include all the group

Notify to console:

Notify to mail:

Behavior:

Step summary

Recommendations

Comments:

Current step configuration: ...

Next step configuration: ...

Voting view ...

Extra Options ...

ID AT Role:

Add forms to the model

Forms can be added to:

- *Extra fields tab*: Forms added in this tab will be visible during case creation.
- *Step > User Type > Service Type Attribute*: Forms related to the service types will be visible in the case management console.
- *Step > User Type > Define CI Attribute*: Forms related to CIs (people, device, knownerror, workaround, etc.) These types of forms will be visible in the case management console.

Extra fields forms

1. Select service type and form.
2. Enable options and permissions:

IDMDINTERFACETYPE	INTERFACETYPE_NAME	
1	0	None
2	1	Attention reports
3	2	Model
4	3	Model Life Status Extra Table

Interface selection
None(Default) or
Model Life Status ExtraTable

Select permissions
to display form
ALL, USER, MANAGER

Form description
(Optional)

Select permission for each field of the form:
Disable, Read, Write, Mandatory

Edit field order

Add help

Include a script
for a field

3. Click on the **Accept** button to save changes.

Forms in Define CI Attribute

1. In the step and for the user type, select the *Define IC attribute* tab.
2. Activate the service type and form checkboxes. Enable the options and permissions.





- Once the configuration of the form for the step, click on the button and then click on the **Accept** button.

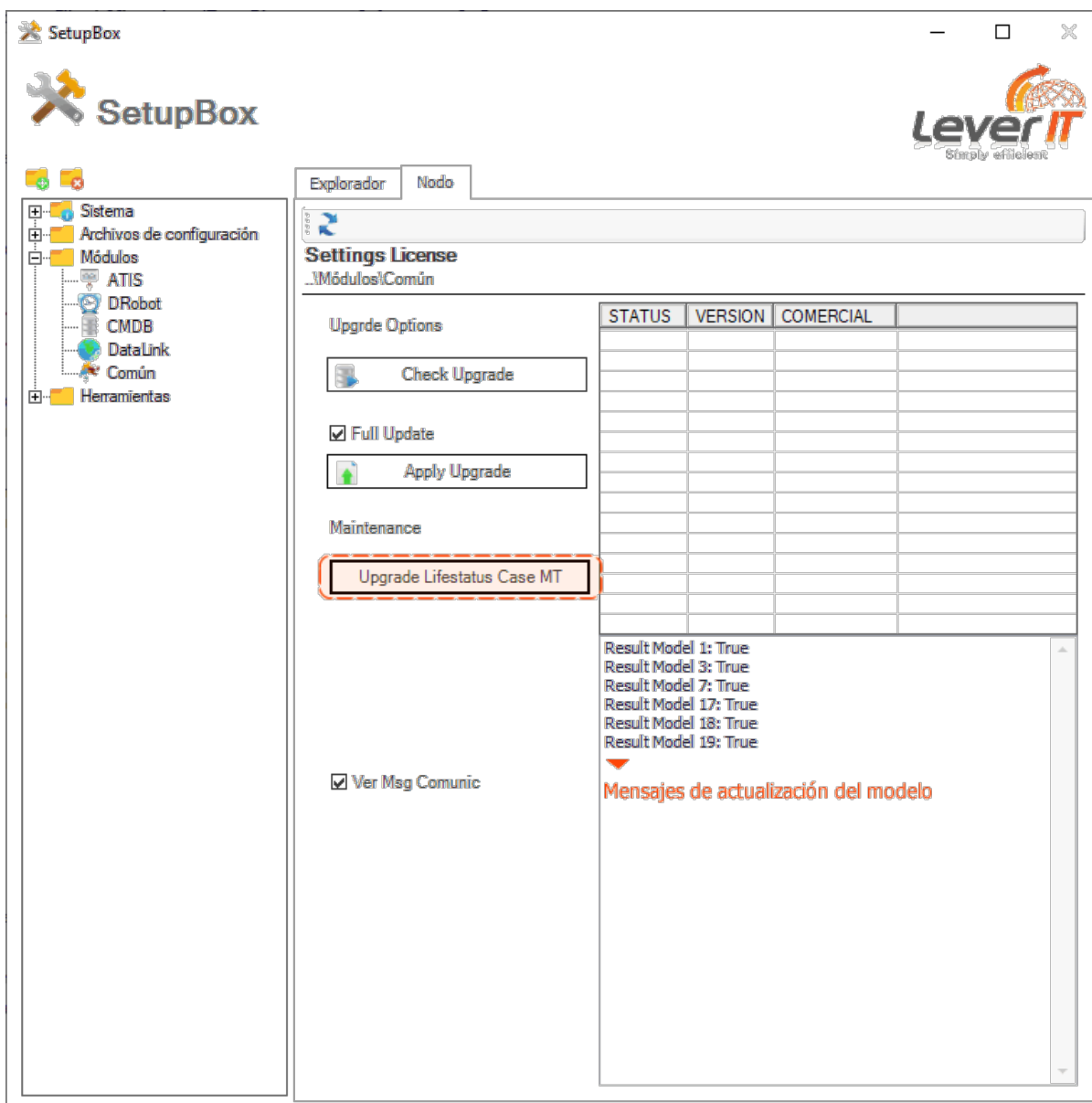
Forms in Service Type Attribute

- In the step and for the user type, select the *Define IC attribute* tab.
- Activate the service type and form checkboxes. Enable the options and permissions.
- Once the configuration of the form for the step, click on the button and then click on the **Accept** button.

Model editing

- Select the model from the list and click on the **Edit** button.
- Make changes to any of the model's configuration options: *basic information, steps, user type configuration, forms, etc.*

3. Once the configuration has been completed, click on the button  (If it is a change related to the steps) and then click on the **Accept** button.
4. To update model changes in open cases (if applicable):
 1. Shut down ITHC services on the server and open the Setupbox.exe module.
 2. Setup.box path: `\Program Files\LeverIT\Discovery\Software\SrvPrg\Setupbox.exe`
 3. Open Setupbox, right click on the icon  in the taskbar notification area and select the Open option.
 4. Select the node *Module > Common* and click on the **Upgrade Lifestatus Case MT** button, the upgrade will be executed.



5. Close the setupbox module and reinitialize the ITHC services on the server.

1)

Externa tipo Model

2)

For case attention

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