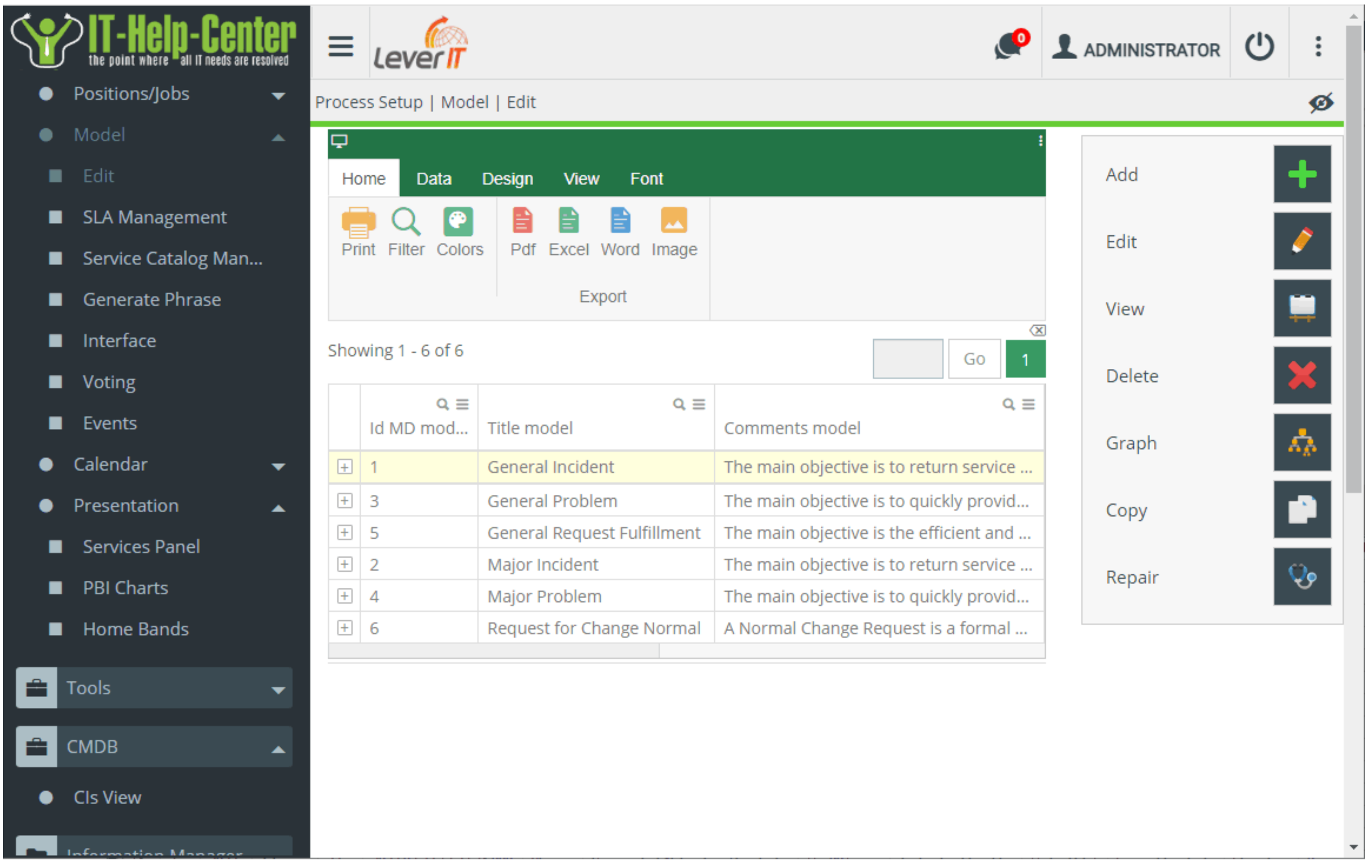
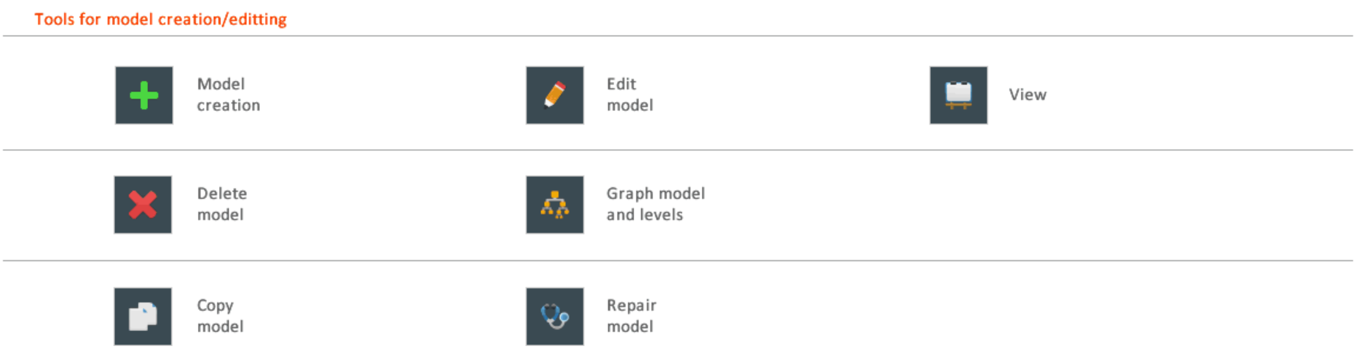
Service model management

The following tasks require administrative privileges.

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

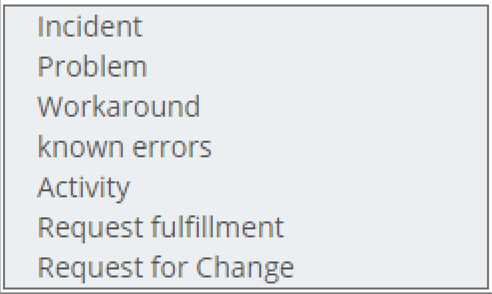




Creation of a model

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	In the drop-down field select the type of service to which the model will apply. Types: 
Normal time	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
Max. time	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

Managers informed Hierarchical escalation	Select the hierarchical escaling group from the drop-down field.
Handler Functional escalation	Select the functional escaling 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

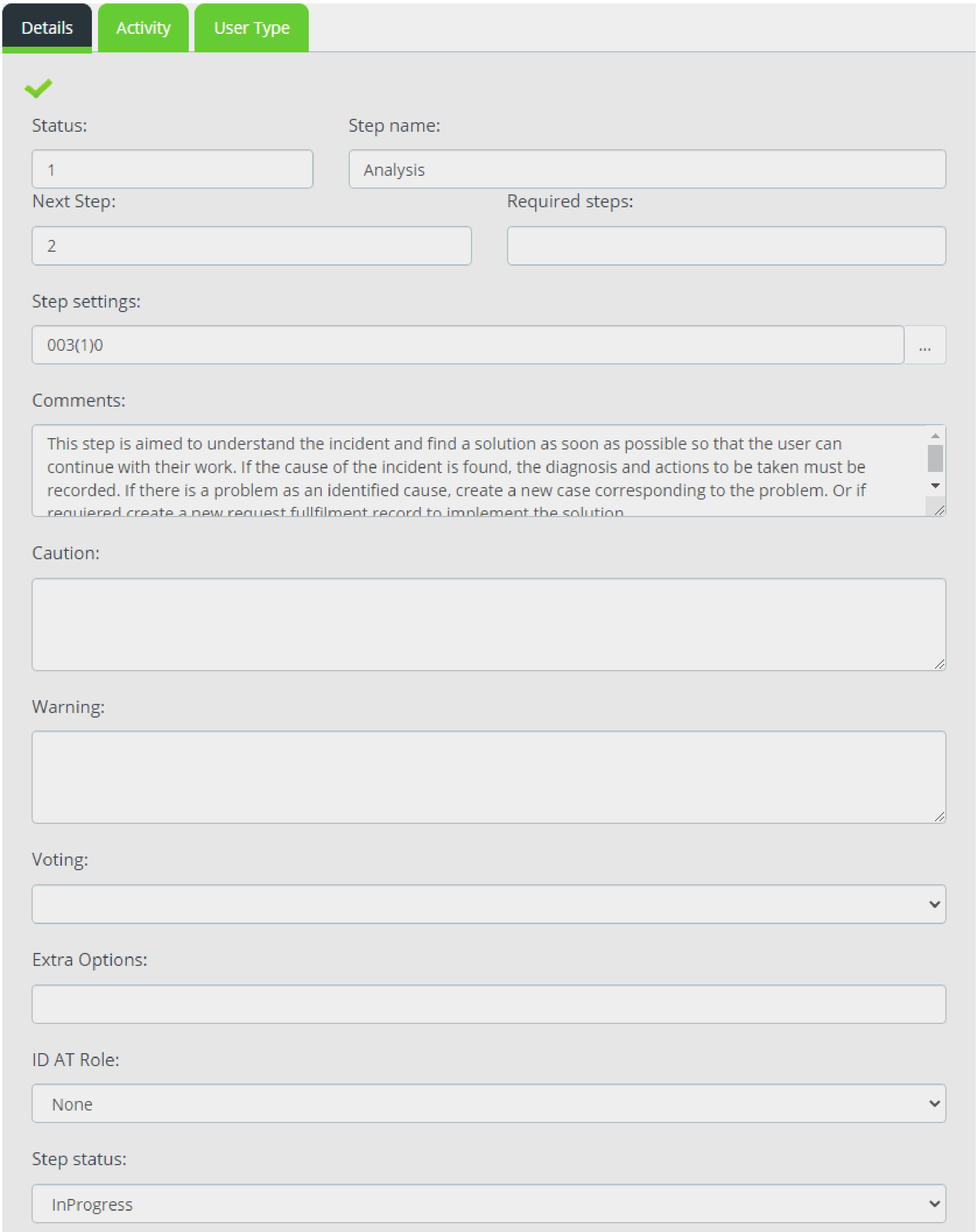
1. The *Details* tab containing the basic form for editing the step will be activated.

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 commmas. 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.

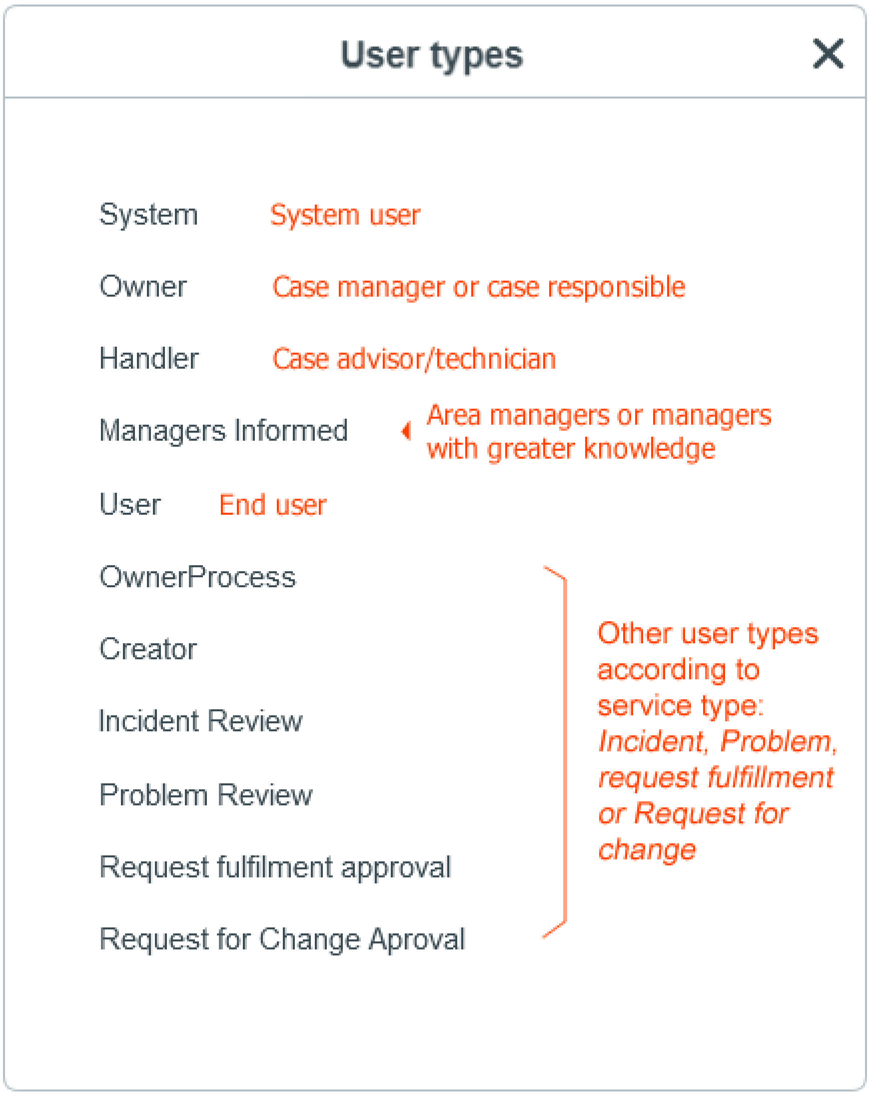
2. Once the step configuration is completed, click on the button 
Follow the same procedure to add more steps to the model.



User Type tab

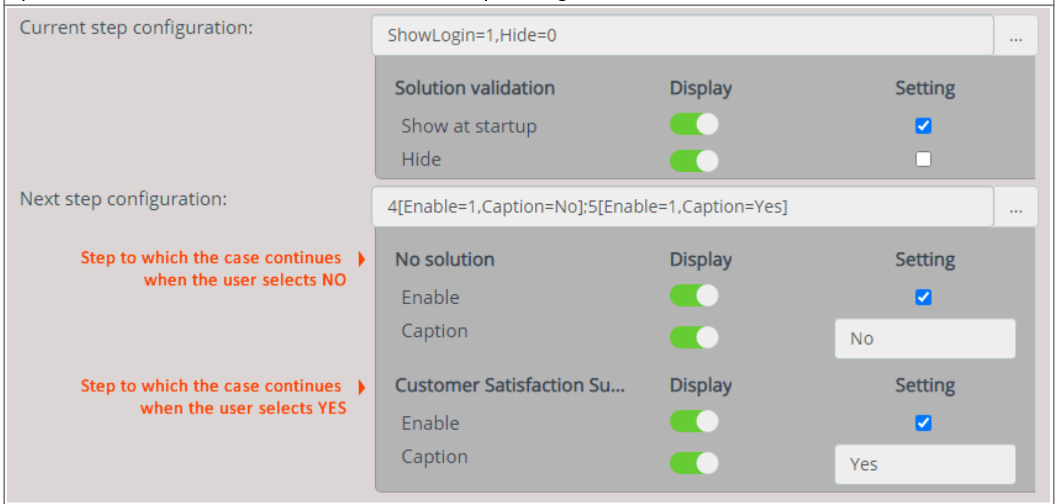
1. The creation of the step will also activate *User Type* tab, which allows configuring the model users.

   Click on button to select user type(s)



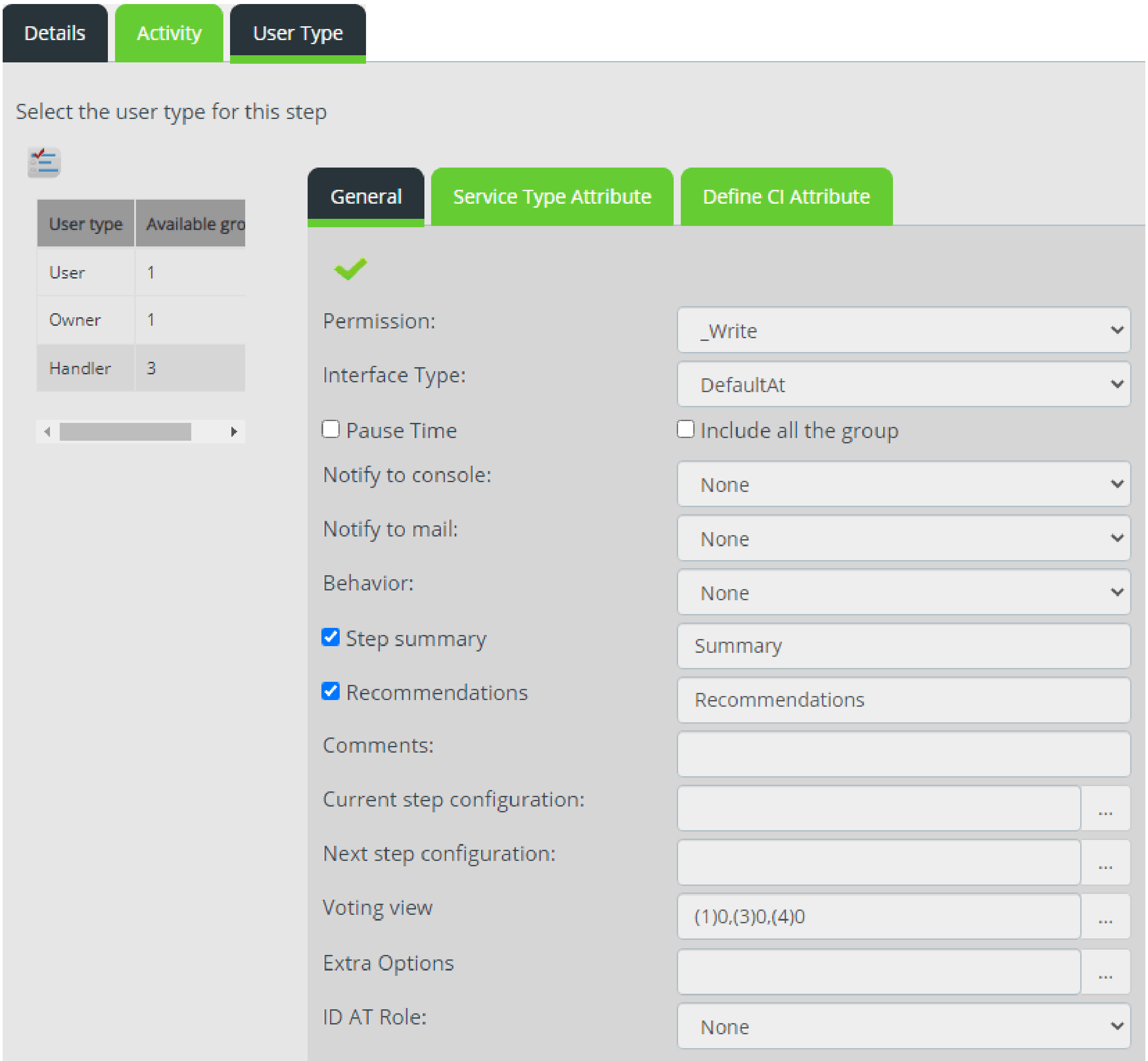
For each user complete the following information

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

Behavior	Allows you to select the display mode for the end-user. Available options: None: Default option, normal display of the case CSATSurvey Display of the user satisfaction survey
Step summary	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.
Recommendations	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.
Comments	Allows additional questions to be sent to the end-user to validate case information and change steps.
Current step configuration	Allows to display the question defined in the *Comments* field when the end-user logs in the ITHC console.
Next step configuration	Allows to configure the step at which the case will continue according to the response and options defined in *Comments* and *Actual step configuration*. 
Voting view	Allows to configure voting/survey in the step.
ID AT Role	Select from the list the virtual role to apply to the step acording to the user type. Choose None if there're no virtual roles.

* 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.



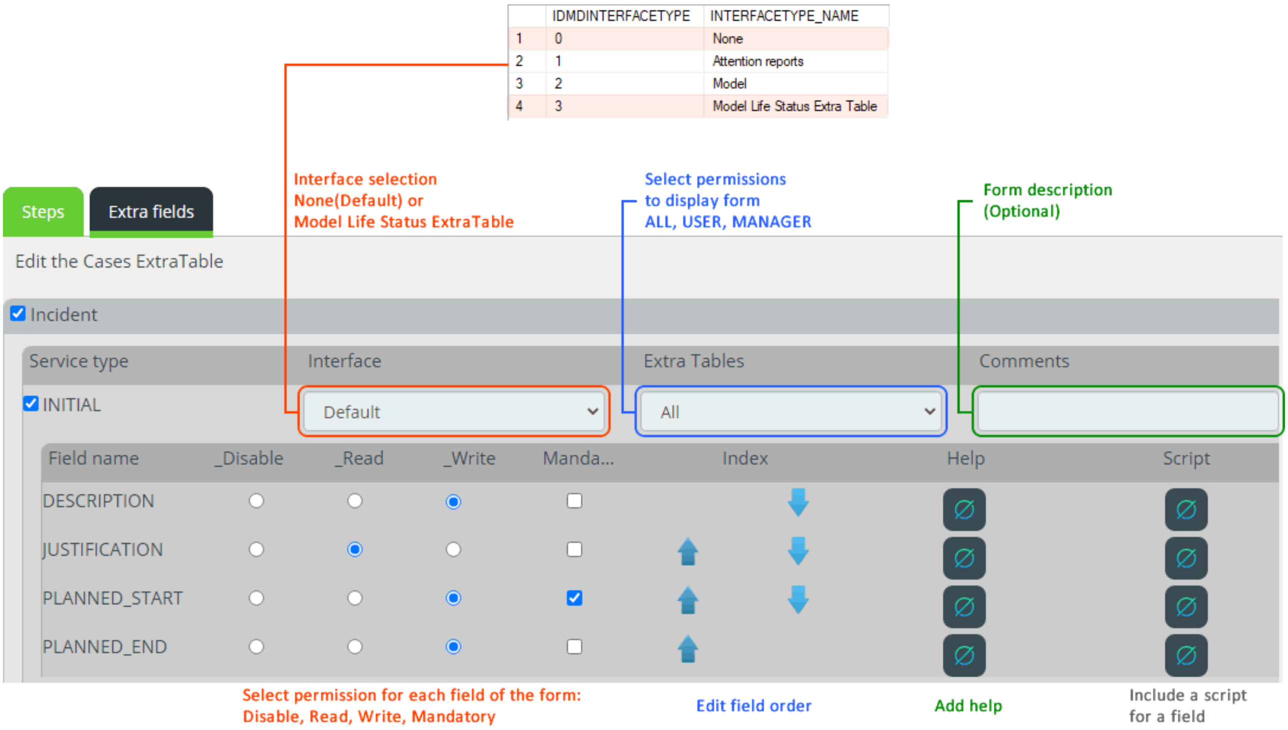
Add forms to the model

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:



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.

3. 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

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

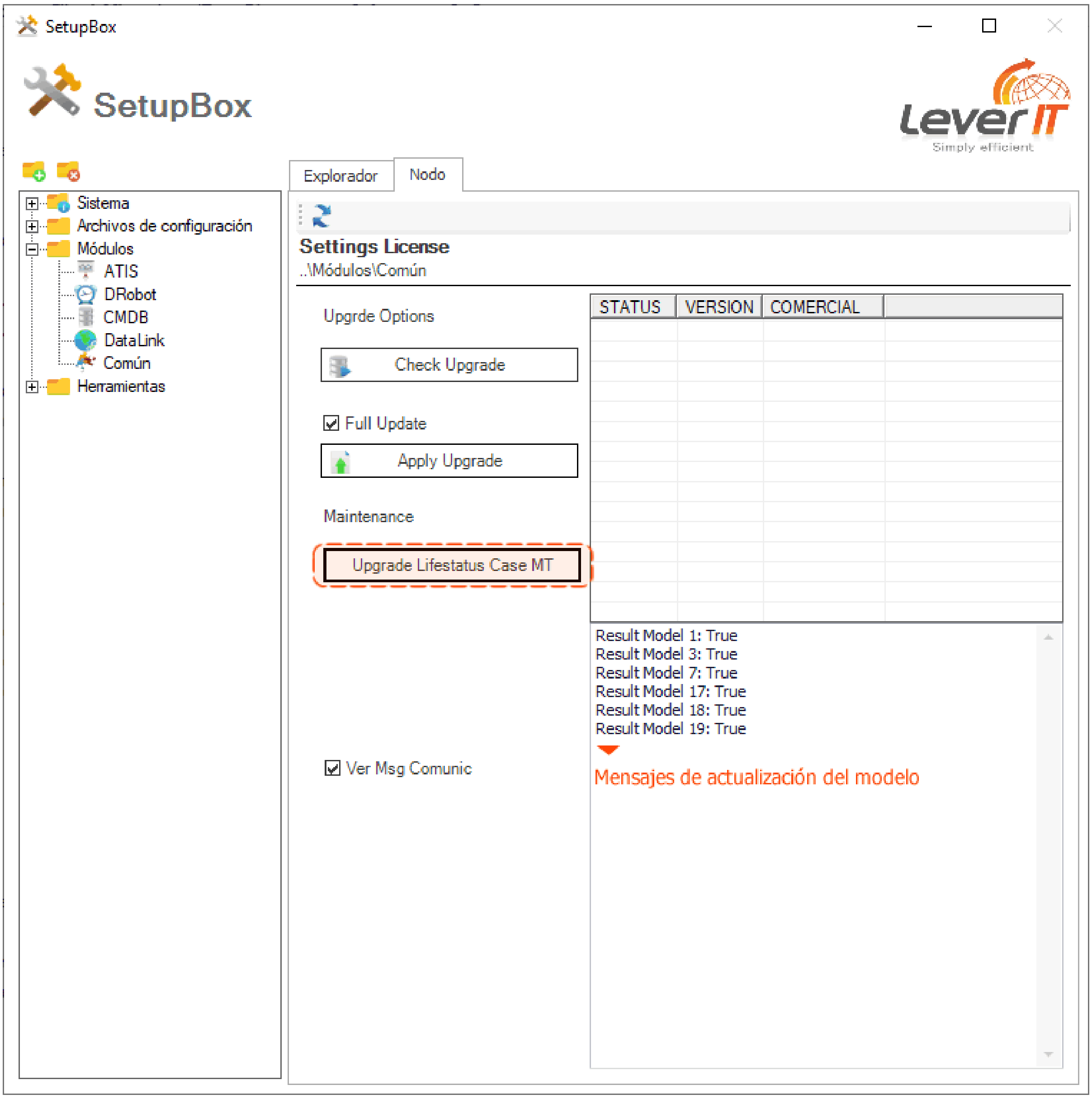
Model editting

1. Select the model from the list and click on the **Edit** button.
2. 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