

# General ITIL Overview

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This page describes a few key features of our ITIL system.

## Which ITIL Standard do we Use?

Our ITIL out-of-the-box system is based on the standards and terminology defined in the ITIL 2011 Edition library.

## Control Active Functions with the ITIL Functions Table

A full-fledged ITIL system includes many complex relationships and handling of the individual components that **may** be included in an ITIL framework. So our out-of-the-box system has many features that not all companies will want to use, such as Operational Level Agreements, Definitive Media Libraries, Underpinning Agreements, a Continual Service Improvement register, configuration item baselines, release management, event management, and so on.

To make it easy to hide or turn off certain features, we have added a table called **ITIL Functions** in the system. This table describes several functional areas in the system and provides an option to turn them on or off. Additionally, it stores notes about additional steps required to hide all the function's related tables and fields, and note for reactivating a disabled function.

If the Function Turned On value is No, then the fields related to that function are mostly hidden from users, while the rules that may run for that function will not meet the condition necessary for them to run. By default, most of the functions are on, with a few exceptions. You may however want to start with just a few functions on, and then add others once you have had some experience with the core functionality. For more details, view the [ITIL Functions](#) section.

Keep in mind that fields that are visibility controlled by the ITIL functions value will only be shown to a user if that user's group has view access to the relevant "ITIL Function turned on" field in that table.

## Time Based Rules Need to be Enabled

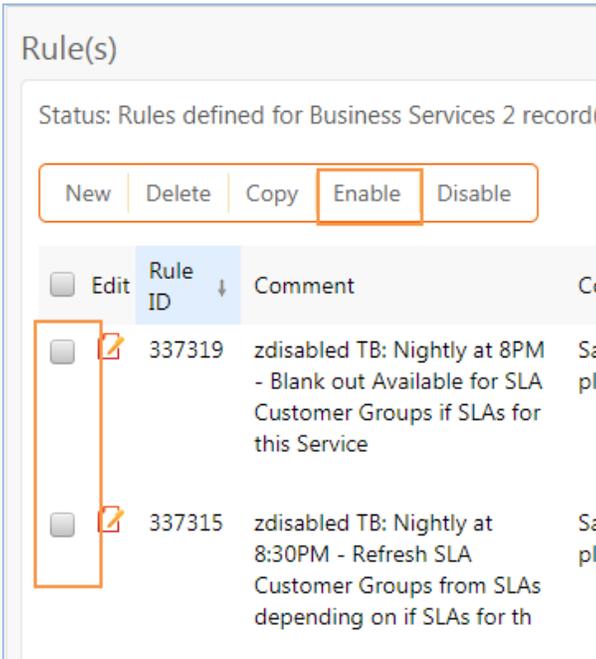
The system comes with over 100 preconfigured time based rules that can run on any frequency, from every 5 minutes to every 10 years. These rules identify service requests or incidents that have gone past their SLA due dates, tasks that are coming due, and much more.

Since there are many parts of the system that a given customer may not use, **we have disabled all these time based rules by default**. As you configure each module of the program to go live, you will need to enable the rules that you want to use.

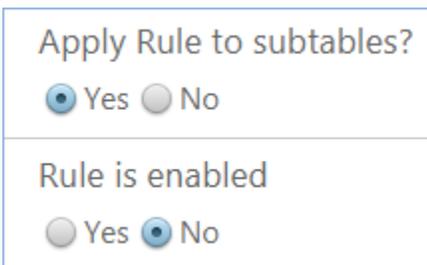
This is easily done from the table setup menu by going to the Rules tab. For instance, suppose you want to turn on time based rules for Business Services. Under the Business Services table in the left pane, click Setup Business Services.



In the table wizard, navigate to the Rules tab. Next, sort rules by the Comment field to find the time based rules that have a z in front of their name, indicating they have been disabled.



Select each rule you want to enable, then click the Enable button in the action bar. That will enable the rules so they start running. Update the name of the rule to remove the zdisabled text - you can also enable each one while editing the name by scrolling to the bottom of the first screen and setting rule is enabled to Yes, then saving the rule.

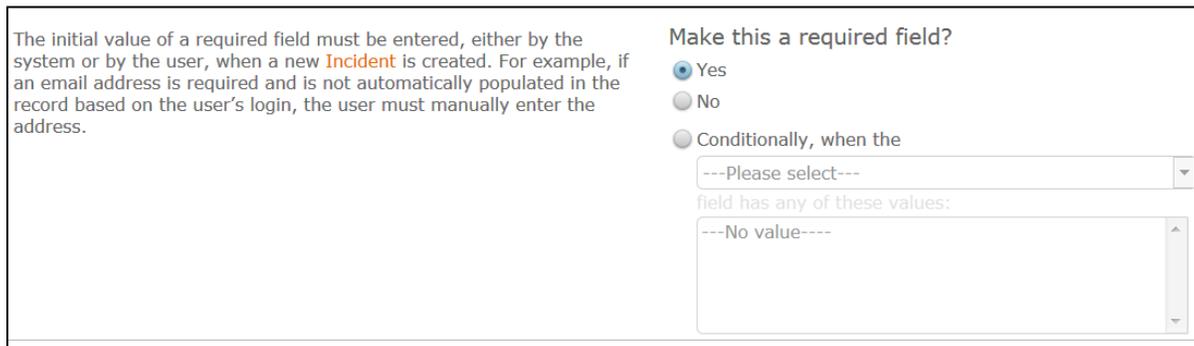


# Security Controls

In general, group permissions control what each user can see and do in the system. A user may belong to more than one group to receive a superset of that group's permissions. For detailed documentation of our group permissions and how they work, click [Group Permissions Help](#).

## Designating Fields as Mandatory

Yes, any field may be made mandatory. It can be defined as always required, never required, or conditionally required based on the value in another choice-based field. This option appears within the field setup wizard, on the Options tab.



The initial value of a required field must be entered, either by the system or by the user, when a new **Incident** is created. For example, if an email address is required and is not automatically populated in the record based on the user's login, the user must manually enter the address.

**Make this a required field?**

Yes

No

Conditionally, when the

---Please select---

field has any of these values:

---No value---

Once fields have been designated as required, how this requirement is displayed is defined globally.

The Required Fields window, located at **Setup > Look and Feel > Required Fields Display**, is a single page that allows you to define how the system displays required fields.

The options selected in the Required Fields window apply to all users, and can be defined separately for User-record fields and for Wizard fields.

Here you can choose:

- Whether to use an asterisk (\*) to denote a required field
- Where to position the asterisk
- To use alternate text defined by the administrator with custom HTML
- The color of the required label

## Archiving Records

Records may be archived automatically in a variety of ways. The system can run a time based rule to set a flag in records whose Date Closed is greater than some time period, for instance 5 years, and that are not used as standard solutions or knowledgebase articles. It can set an Archived flag to Yes, and that can cause the records to be made invisible to standard users and then deleted on a regular basis, say quarterly or annually, after saving a backup with all archived records.

In our out-of-the-box setup, we have added an Archived field for Incidents with a rule to set the value to Yes three years after an incident is closed, provided it is not a standard solution or converted to a knowledgebase article.

## Unique Record IDs

In Agiloft, any record is automatically assigned an ID number that is unique in the table in which it resides. The numbers are incremented by 1 for each record. If a customer requires a more complex numbering system, we can customize the system to add prefixes or other values in addition to the automatically incrementing number.

## Audit Trails and the History Field

Each table has a History field that maintains an audit trail of every change made to the record, whether that change is made by a user or a rule action.

History Events			
History			
Date	Modified By	Modified Fields	
May 21 2016 13:50	ewsystem	Review for Knowledgebase, Date Updated, All Time Spent, Standard Solution, Total Hours to Close, Resolution, D	
May 21 2016 13:32	ewsystem	Number of Completed Tasks, Total Tasks Cost	
May 21 2016 13:29	ewsystem	Date Updated, Show Launch Task Button	
May 21 2016 13:29	ewsystem	Date Updated, Select Tasks	
May 21 2016 13:29	ewsystem	Date Updated	
May 21 2016 13:29	ewsystem	Status, Date Updated, Show Launch Task Button	
May 21 2016 13:28	ewsystem	Date Updated	
May 21 2016 13:28	ewsystem	Number of Tasks, Show Launch Task Button, Date Updated	
May 21 2016 13:28	ewsystem	Date Updated	
May 21 2016 13:27	ewsystem	Date Updated, Select Tasks	
May 21 2016 13:22	ewsystem	<b>Incident Created</b> Priority ID, Cost Model, SLA Target Resolution Time, Priority, Assigned Team, SLA Target ID, SLA Warning Date,	

You can open any entry for complete change details. The history shows whether changes were made by a user or a rule, and also provides a button, View Incident After Change, to show a snapshot of the state of the record after this change.

May 21 2016 13:50  
Changes made by ewsystem [View Incident After Change](#)

Field Changed	From	To	By
All Time Spent	--undefined--	0.4	
Closed By	--undefined--	Agiloft System	
Closed By Team	--undefined--	Admin Team	
Review for Knowledgebase	--undefined--	No	
Resolution	--undefined--	Completed and provided new key card to the employee.	
Standard Solution	--undefined--	No	
Date Closed	--undefined--	May 21 2016 13:50	
Working Hours to Close	--undefined--	0.514	Default
Status	In Progress	Closed	
Date Updated	May 21 2016 13:29	May 21 2016 13:50	
Total Hours to Close	--undefined--	0.514	

Rule: Edit: Edit actions (API Enabled) [View Incident After Change](#)

Action Name	Action Report
Status Change and Notification Actions for incidents	If-then-else flow  search matched      Status changed from: any value to: 'Closed' during record's last modification search matched      -else- action executed      Set SLA Met to Yes search matched      Service is Billable='Yes' search matched      Cost Model='Fixed for the Service' action executed      Set Total Cost from Fixed Cost

Field Changed	From	To	By
Total Cost	--undefined--	\$50.00	Status Change and Notification Actions for incidents
SLA Met	No	Yes	Status Change and Notification Actions for incidents

# Searching

Any table in the system can be searched. For instance, you may want to find a particular incident, or all contracts of a certain type, or you may be looking for particular text content within an attached file. The quick search block lets you complete *ad hoc* searches, and is used when you don't anticipate running the same search again.

Saved searches let you run the same search repeatedly and are typically used for searches you will need routinely. Saved searches have the added benefit of accepting more complex search criteria and offer more granular search results.

# Quick Searches

Quick searches are done from the search block above the table you wish to search. If the search block (screenshot below) is not visible, click Search on the action bar to expand the search block.

Search:  contains

Show All  
  Refine  
  String  
  Context  
  Active Only  
 More Options

**GO**

# Using the Search Block

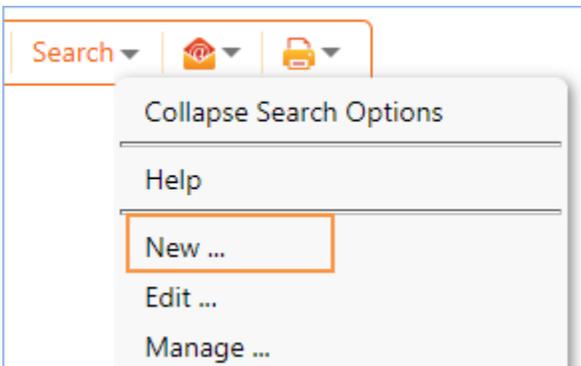
- The first input box is a drop-down to indicate which field in the table to search. If the default -TEXT- is selected, all fields will be searched, including the content within any attached files, including .doc, .docx, text, and CSV files as well as OCR'd PDF files.
- The second input box defines the search operator. Different operators are available depending on the type of field selected in the first box. For example, numeric or choice fields offer "greater than" and "less than" operators, but text fields do not.
- In the third input box, enter the value you are searching for.

The most common ad hoc searches will look something like "Knowledge Type equals User Guide" or "Incident Summary contains keycard." Quick searches can be performed on related tables using the search function on the associated action bar.

## Saved Searches

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To create a saved search, hover over the down arrow next to the search item in the action bar and select New.



This opens the saved search wizard, which has options for Simple filters (most commonly used), as well as more advanced options. Click Simple to add a filter.

Add Filters:

Simple Time Calendar Advanced Related Table Run-Time Duplicate First/Last

-TEXT- contains Value

-TEXT-

Approval Notes

Approver(s)

Assigned Person

Assigned Team

Audience

Change Manager

Change Request Attached Files

Change Request Status

Change Request Working Notes

Change Summary

Compliance Notes

Content

Created By

Creator Login

Creator Team

Date Created

Date Published

Date Retired

Date Updated

Cancel

Just like the quick search above, simple filters let you search any field for a particular value. Again, selecting -TEXT- will search through all available fields within the current table. For more information on the other search types, please see [Saved Searches](#) or the [online training unit for searching](#).

## Managing Saved Searches

Users in the Admin group, and those with permission to publish saved searches, see an Apply tab in the saved search wizard where they can decide which groups should have the search:

1. Accessible
2. Active
3. Visible in left menu
4. Visible in My Assigned

The Apply tab options have the following results:

1. Choosing to make a search Accessible gives user the ability to interact with the search in their own Manage Searches wizard.

Each staff, or power user, can adjust where their accessible searches appear by checking the Active, Show in Left Pane, or Show in My Assigned boxes, defined next. This lets users customize where searches appear to tailor the interface to their work preferences.

1. Active makes the search appear on the Search drop-down.
2. Show in Left Pane adds the search to the left pane, indented below the Table name.
3. Show in My Assigned adds the search to the My Assigned section in the left pane.

# Additional Searching in the EUI

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In the end user interface home page, there is a search block that can be used to search tables to which the user has access. A general internal customer can search service requests, incidents, articles, or can use an integrated search Google.

