

# PROVANCE

## IT SERVICE MANAGEMENT HANDS-ON GUIDE

AppSource Trial Lab



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# Introduction

Provance IT Service Management is a modern IT Service and IT Asset Management solution powered by Microsoft Dynamics 365®. It runs natively within the Microsoft Cloud Platform and is optimized for use with Microsoft System Center.

## Certification

This section provides a brief overview of ITIL® and our certification.

## About ITIL

- The **Information Technology Infrastructure Library** (ITIL) is a globally recognized collection of best practices for information technology (IT) Service Management.
- ITIL provides a customizable framework of **best practices** to achieve **quality of service** and overcome difficulties associated with the **growth of IT systems**.

Provance ITSM supports key ITIL processes that are broken down in the ITSM solution by the five ITIL pillars. Eleven of the Provance processes are certified by PinkVERIFY™. The five pillars are:

### Strategy

Deciding what services to offer and build cases to justify new or changed services.

### Design

Determine what metrics you want to track and how everything will be built to support new services.

### Transition

Organizations can coordinate releases, manage the risk and impact, and effectively promote changes to the live environment.

### Operations

Monitor and track issues, requests, and changes to the services offered.

### Improvement

Used throughout the life cycle of services, including the development of improvement plans.

## PinkVERIFY™ for 11 ITIL® Processes

1. Incident Management
2. Request Fulfilment
3. Problem Management
4. Knowledge Management
5. Change Management
6. Service Level Management
7. Service Portfolio Management
8. Service Catalogue Management
9. Release & Deployment Management
10. Event Management
11. IT Service Continuity Management

Provance has built out fundamental sections for:

1. Cloud Service Management for Azure and Azure Service Maps
2. Service Assets and Configuration Management
3. Availability Management
4. Capacity Management
5. Financial Management

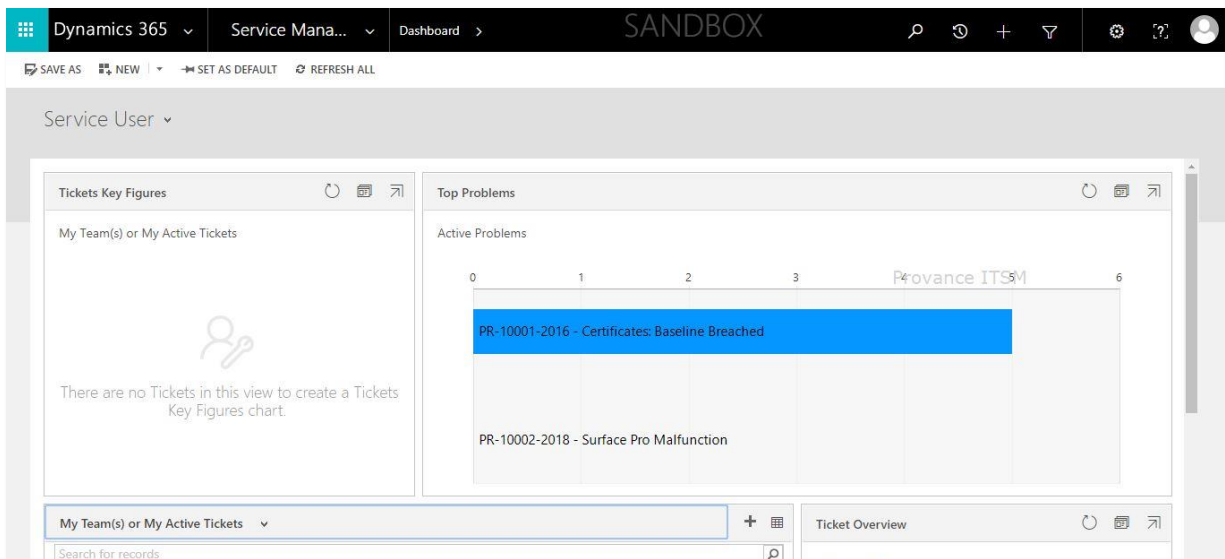
## ITSM for Enterprise Service Management

In addition to the Dynamics 365 web console and mobile apps, Provance ITSM offers an end user centric self-service portal. The portal is not part of this lab, but a video overview is provided. Please reach out to a Provance Business Development Manager through [info@provance.com](mailto:info@provance.com) for more information and a demo.

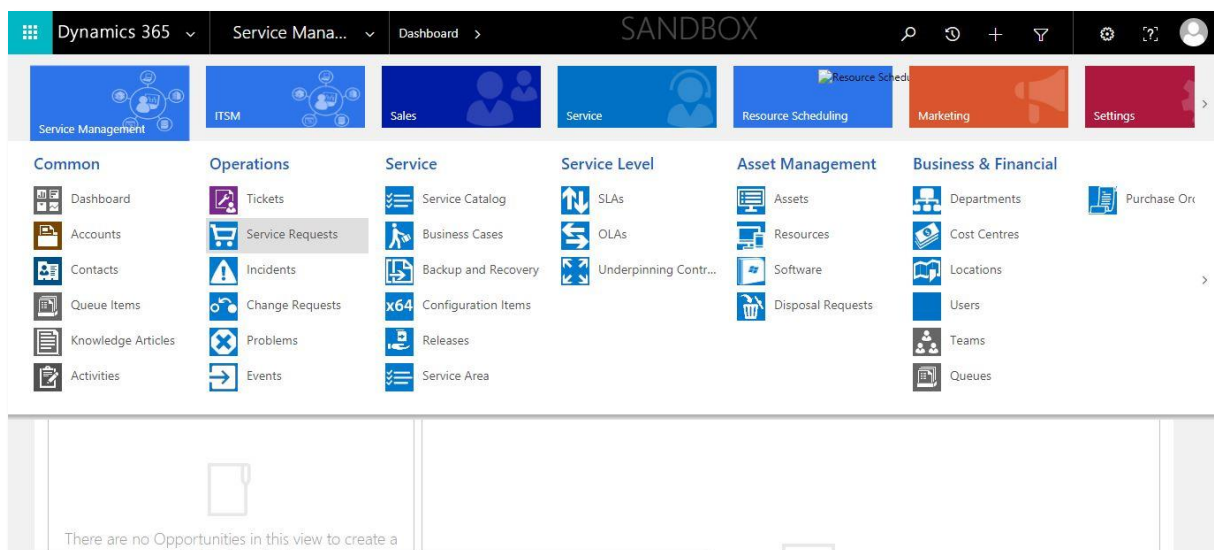
# Learning Path #1: Create a Service Request

Let's get started.

1. Beside Service Management in the top navigation, **Click** the dropdown arrow to see all of the entities that you have access to in Provance ITSM, based on your security role. Among them will be service requests.



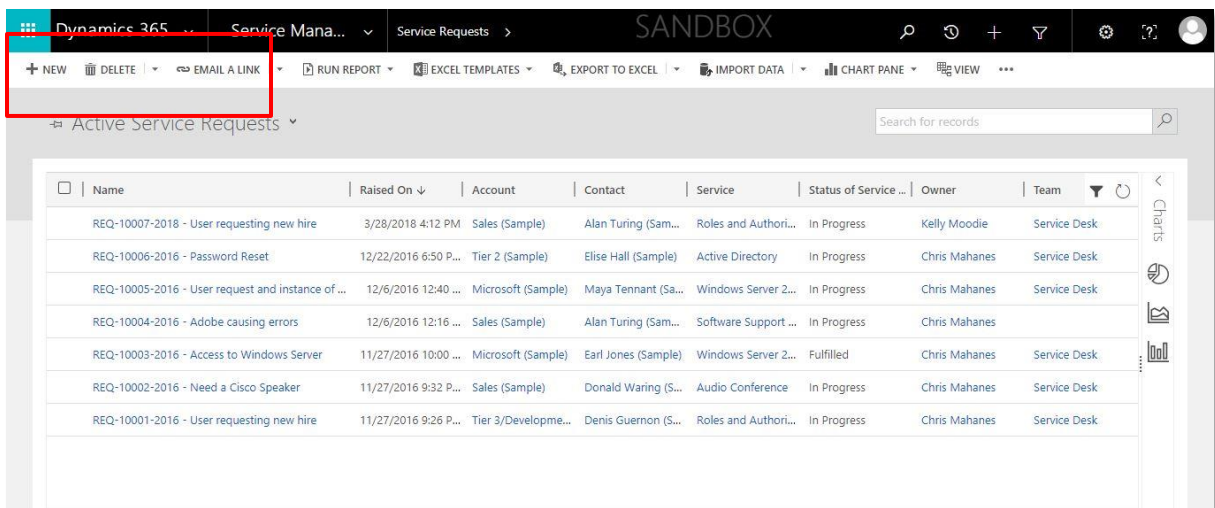
2. Service requests are intended to cover standard services, general information, complaints or comments. Click **Service Requests**.



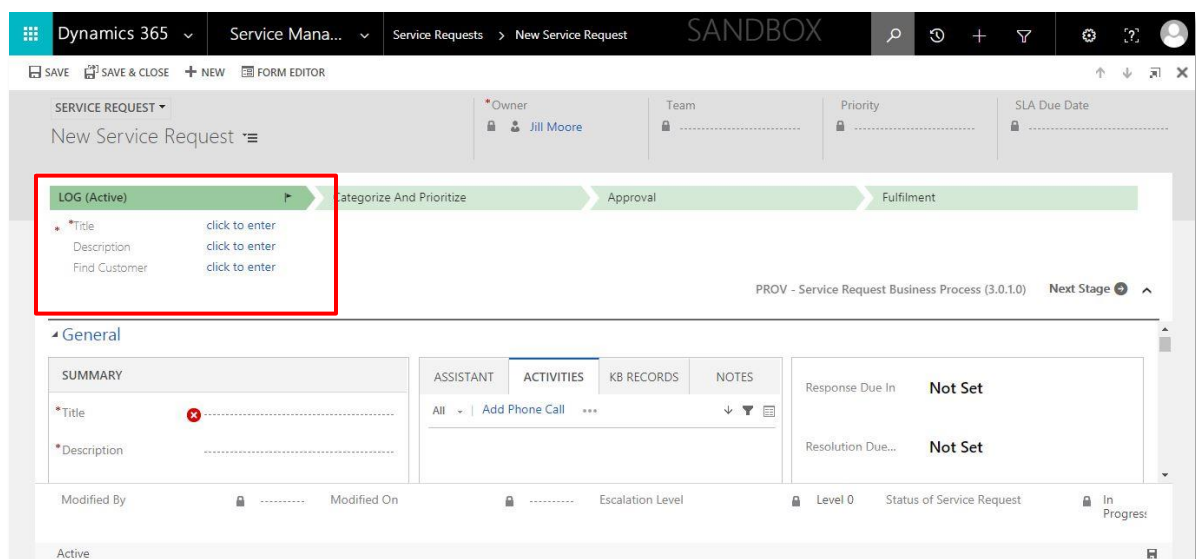
3. The default view shows an agent all the active service requests that need to be fulfilled. Each request can have one of the following states:

- **Awaiting Approval:** The request requires approval before it can be completed.
- **Awaiting Assignment:** Each request needs to be assigned to an individual for fulfillment. It is assigned to a team by default.
- **Fulfilled:** The request has been fulfilled.
- **In progress:** Assigned to an individual who is working on the request.

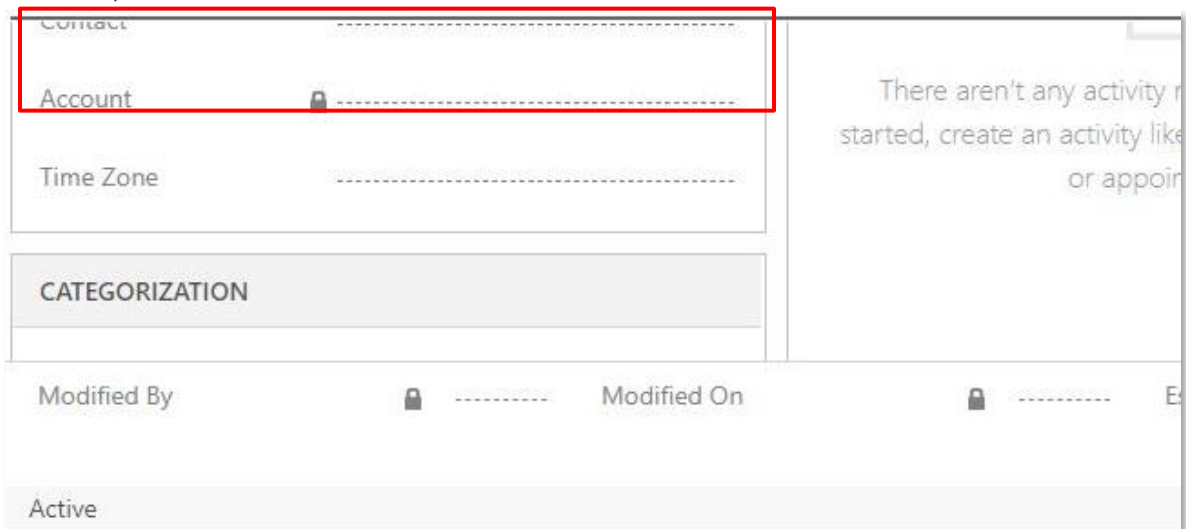
Click **+New** to create a Service Request.



4. **Logging:** when the service desk receives a call, you could enter all the details by hand. However, a ticket template provides a simpler approach.

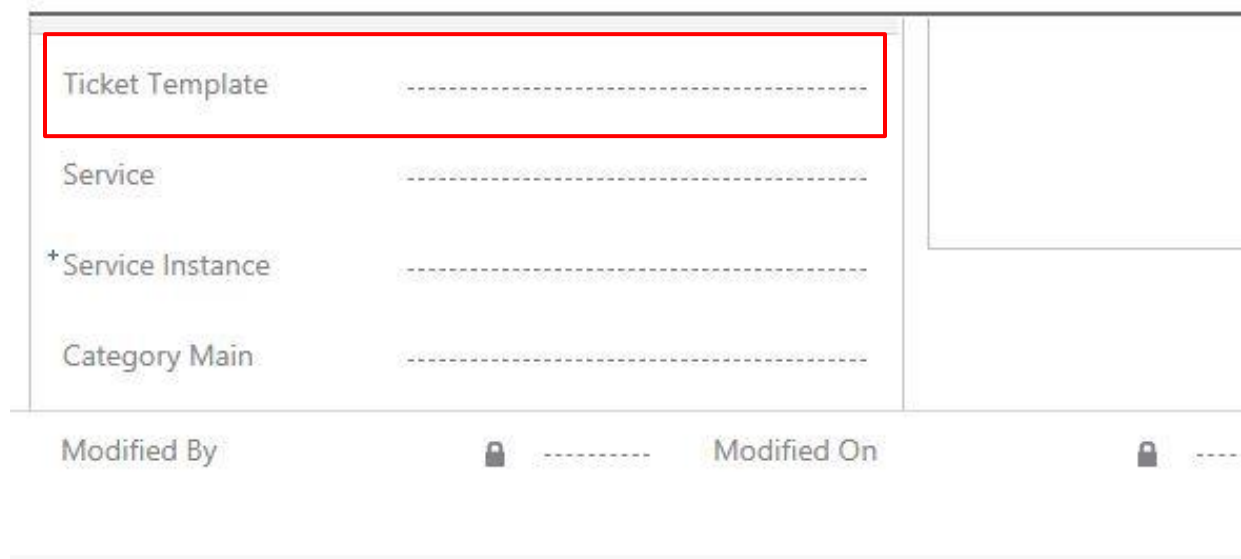


5. **Record Submitter:** The contact person for the request is an important role that should be included on the form, since it will also be used as the Customer. The Customer can define what ticket templates are available on the request.



The screenshot shows a web form for creating a request. A red rectangular box highlights the 'Contact' and 'Account' fields, which are text input areas. Below these fields is a 'Time Zone' dropdown menu. Further down is a section titled 'CATEGORIZATION' with a light gray background. At the bottom of the form, there are fields for 'Modified By' and 'Modified On', each followed by a lock icon and a dashed line indicating a required field. The 'Active' status is shown at the very bottom.

6. **Use An Accelerator:** Think of a ticket template as an accelerator that makes life simpler by doing some of the work for you. In this case when a ticket template is selected for the request, it adds a title and a description to it.



The screenshot shows another view of the request form. A red rectangular box highlights the 'Ticket Template' field, which is a text input area. Below it are fields for 'Service', '\* Service Instance', and 'Category Main', all of which are text input areas. At the bottom, there are 'Modified By' and 'Modified On' fields, each with a lock icon and a dashed line. The form is set against a light gray background.

7. **Save to Create the Record:** after the contact and their request details are entered, the record is saved and the request is created. Try adding **Alan Turing** as the contact. Apply the **New Hire** ticket template to see how the request changes.

Dynamics 365 Service Management Service Requests

SAVE SAVE & CLOSE + NEW FORM EDITOR

SERVICE REQUEST

New Service Request

LOG (Active) Categorize And Prioritize

\* Title click to enter

Description click to enter

Find Customer click to enter

## Learning Path #2: Review a Request Template

1. Click the **Service Management** drop down to see all of the entities you have access to in Provance ITSM, based on your security role. Among them will be service requests.

Dynamics 365 Service Management Service Requests REQ-10001-2016 - U...

SAVE AND CLOSE HOLD ADD WATCHER ESCALATE + NEW APPROVALS RETURN DELETE PROCESS

SERVICE REQUEST REQ-10001-2016 - User requesting new hire

LOG Categorize And Prioritize (Active for 472 days, 12 hours) Approval Fulfillment

Service Request Type click to enter

\*Service Roles and Authorization

\*Category Main Access/Security

Category Detailed

\*Urgency

\*Impact

Application Access

3-Medium

3-Moderate

Responded To No

PROV - Service Request Business Process (3.0.1.0) (Active for 472 days, 12 hours) Next Stage

General

SUMMARY

Title User requesting new hire

Description Request has been made to generate a new user on the network.

Raised On 11/27/2016 9:26 PM

\*Contact Denis Guernon (Sample)

Account Tier 3/Development (Sample)

Time Zone

CATEGORIZATION

Ticket Template New Hire Request

ASSISTANT ACTIVITIES KB RECORDS NOTES

Response Due In 528d 4h 16m 29s

Resolution Due In 525d 5h 16m 29s

SLA Status Running

Status of Service Request In Progress

CUSTOMER DETAILS

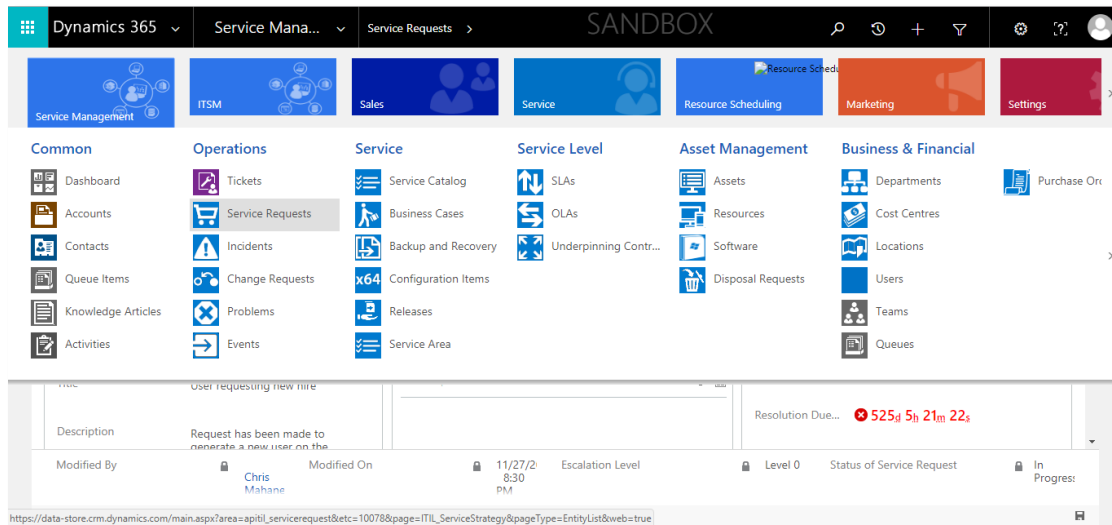
\*Full Name Denis Guernon (Sample)

VIP Contact No

Email Denis.Guernon@provance.com

- Service requests are intended to cover standard services, general information, complaints or comments.

Click **Service Requests**.



- Review of Completed Request:** Select the **REQ-10001-2016** to show the service request that was created by a Ticket Template.

Active Service Requests									
<input type="checkbox"/>	Name	Raised On	Account	Contact	Service	Status of Service	Owner	Team	SLA Status
<input type="checkbox"/>	REQ-10007-2016 - User requesting new hire	3/28/2016 4:12 PM	Sales (Sample)	Alan Turing (Sam...	Roles and Authori...	In Progress	Kelly Moodie	Service Desk	Running
<input type="checkbox"/>	REQ-10006-2016 - Password Reset	12/22/2016 6:50 P...	Tier 2 (Sample)	Elise Hall (Sample)	Active Directory	In Progress	Chris Mahanes	Service Desk	Running
<input type="checkbox"/>	REQ-10005-2016 - User request and instance of ...	12/6/2016 12:40 ...	Microsoft (Sample)	Maya Tennant (Sa...	Windows Server 2...	In Progress	Chris Mahanes	Service Desk	Running
<input type="checkbox"/>	REQ-10004-2016 - Adobe causing errors	12/6/2016 12:16 ...	Sales (Sample)	Alan Turing (Sam...	Software Support ...	In Progress	Chris Mahanes	Service Desk	Running
<input type="checkbox"/>	REQ-10003-2016 - Access to Windows Server	11/27/2016 10:00 ...	Microsoft (Sample)	Earl Jones (Sample)	Windows Server 2...	Fulfilled	Chris Mahanes	Service Desk	Completed
<input type="checkbox"/>	REQ-10002-2016 - Need a Cisco Speaker	11/27/2016 9:32 P...	Sales (Sample)	Donald Waring (S...	Audio Conference	In Progress	Chris Mahanes	Service Desk	Running
<input type="checkbox"/>	REQ-10001-2016 - User requesting new hire	11/27/2016 9:26 P...	Tier 3/Developme...	Denis Guernon (S...	Roles and Authori...	In Progress	Chris Mahanes	Service Desk	Running

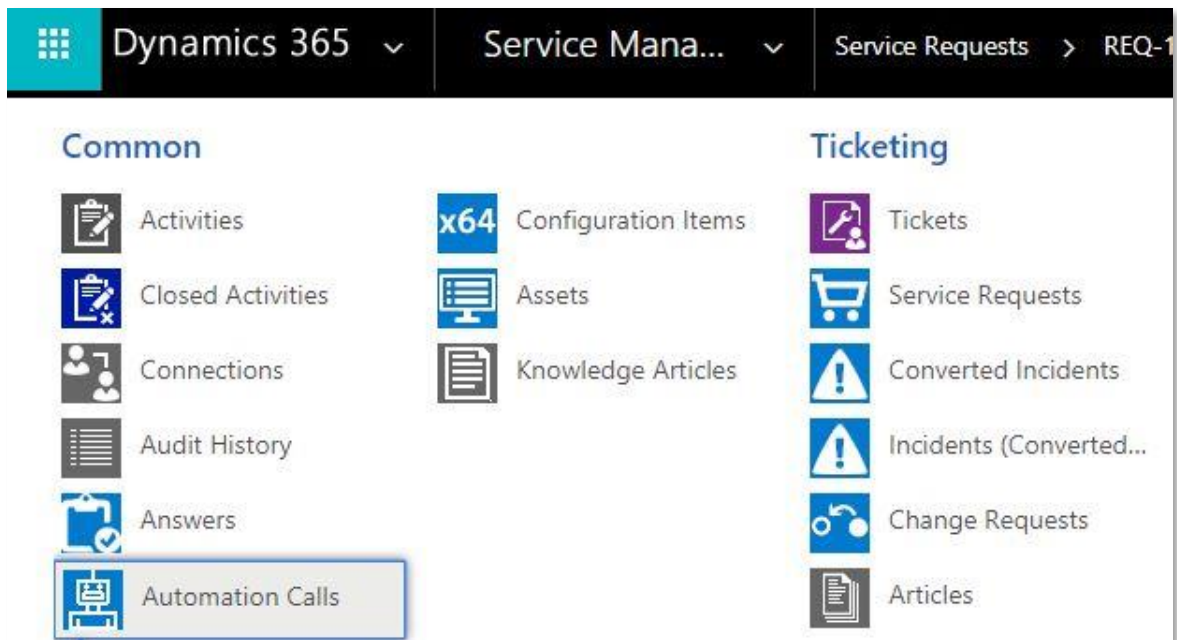
4. **Ticket Template:** In Request Fulfillment, you can use a ticket template to speed up data entry, generate required activities and even perform actions using automation.

The screenshot displays the Dynamics 365 Service Manager interface for a Service Request titled 'REQ-10001-2016 - User requesting new hire'. The 'SUMMARY' tab is active, and a red box highlights the 'Title' and 'Description' fields. The 'Title' field contains 'User requesting new hire' and the 'Description' field contains 'Request has been made to generate a new user on the network.' The 'CATEGORIZATION' section shows 'Ticket Template' set to 'New Hire Request'.

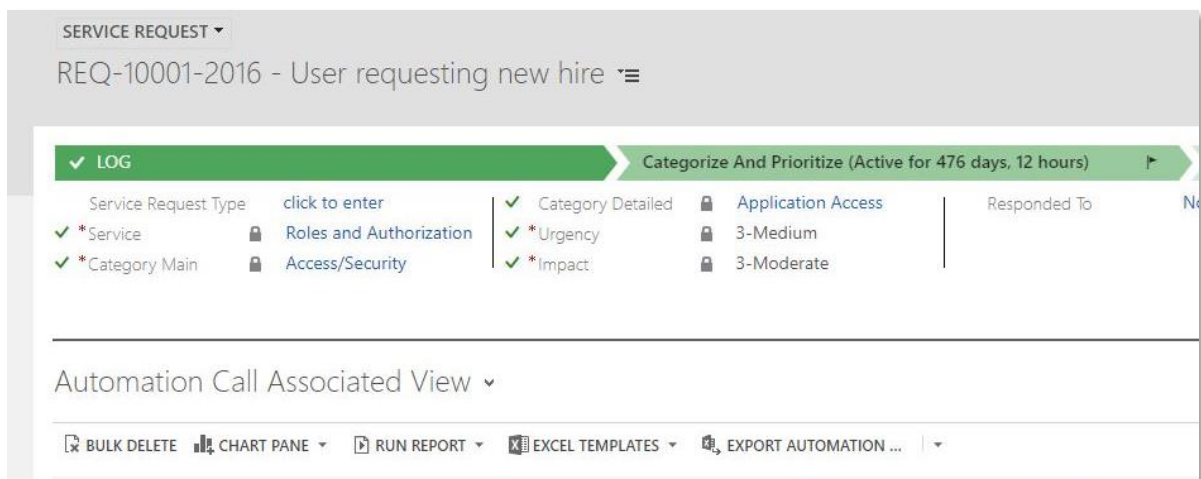
5. **Extended Menu:** The extended menu is used to navigate to records related to the request. Click the arrow to see the extended menu.

The screenshot displays the Dynamics 365 Service Manager interface for the 'Service Requests' list. A red box highlights the 'REQ-10001-2016 - U...' record, which has a right-pointing arrow next to it, indicating an extended menu.

6. **Automation:** When there are automations related to a ticket, review them within Automation Calls. There are many ways an automation can help you. One of those is by sending parameters to Azure to perform an action there. For example, if a user needs to be created in Office 365, the automation call can take the information submitted (as parameters) and create the user for you. Click **Automation Calls** to continue.



7. **Configuration:** If the request had an automation call, a notification banner would appear across the top of it. Click the title **REQ-1001-2016** to navigate back to the form. Let's review the ticket template to see how you can configure a request template.



8. **Ticket Template:** Select the ticket template to see all the capabilities Provance ITSM has to offer.

Ticket Template	New Hire Request
Service	Roles and Authorization
+ Service Instance	-----
Category Main	Access/Security
Category Detailed	Application Access
Related Asset	-----
Configuration Item	-----

9. **Template Details:** Here are the high-level details for this template. The Name and Template Description are visible on the portal by default, so an end user can request this offering.

Template Details	
*Name	New Hire Request
Status Reason	Active
*Owner	Chris Mahanes
Template Description	On-board a new employee

10. **Ticket Details:** This section saves time during ticket logging and helps ensure consistency with like requests. Sometimes creating the ticket and managing it takes longer than the action; for example, with a password reset. Reduce time by defining ticket details as well as resolution and closure specifics to perform an Open and Close action with minimal manual data input.

Ticket Details	
Ticket Title	User requesting new hire
Ticket Description	Request has been made to generate a new user on the network.
Fulfillment or Resolution Description	-----
Closure Description	-----

11. **Consistency:** You can ensure consistency and predictability by specifying the service, the categories and the priority.

Categorization	
Service	Roles and Authorization
Category Main	Access/Security
Category Detailed	Application Access
Urgency	3-Medium
Impact	3-Moderate

12. **Automation:** If you have enabled Automation in Provance Settings, you will be able to add the automation details here.

### Automation Settings

Automation Template

Automation Trigger

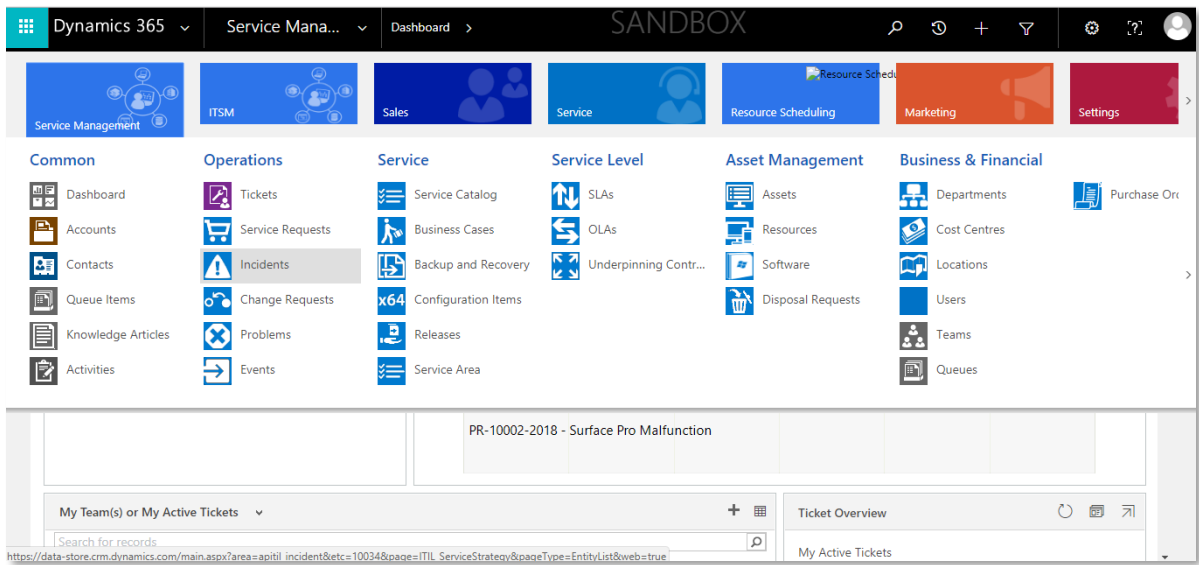
## Learning Path #3: Review an Incident

1. The Site Map lets you navigate through all the different modules of Provance ITSM.. Click the **Service Management** drop down arrow.

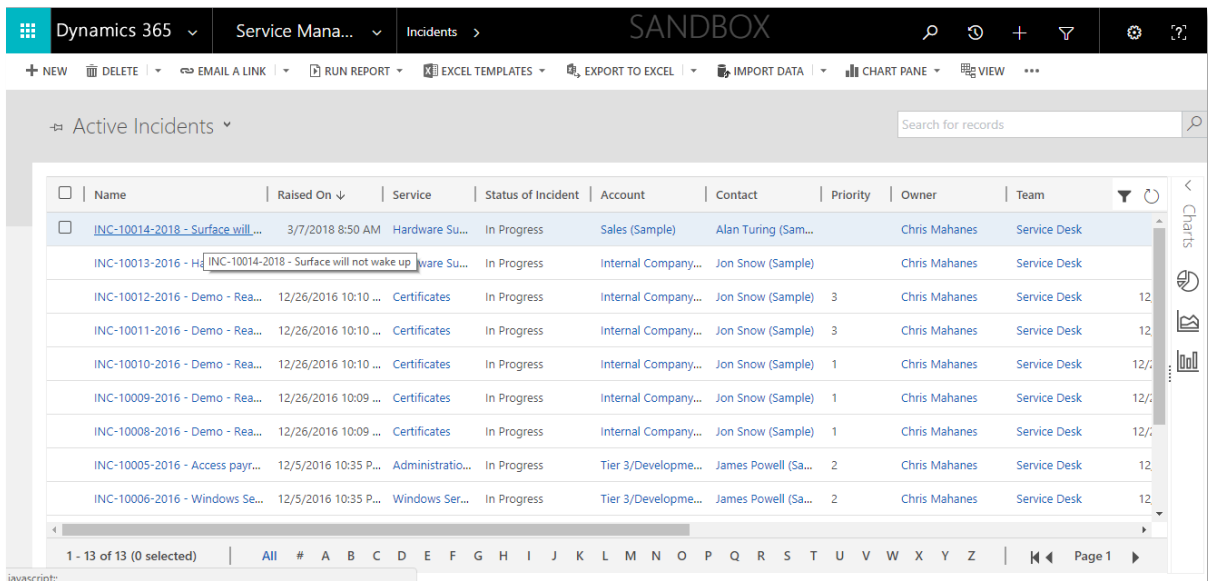
The screenshot displays the Provance ITSM interface. At the top, there is a navigation bar with 'Dynamics 365', 'Service Mana...', and 'Dashboard'. Below this, a 'Service User' dropdown is visible. The main content area is divided into several sections:

- Tickets Key Figures:** A section titled 'My Team(s) or My Active Tickets' with a message: 'There are no Tickets in this view to create a Tickets Key Figures chart.'
- Top Problems:** A section titled 'Active Problems' showing a bar chart. The chart has a horizontal axis labeled 'Provance ITSM' with values from 0 to 6. Two bars are visible: a blue bar for 'PR-10001-2016 - Certificates Baseline Breached' and a grey bar for 'PR-10002-2018 - Surface Pro Malfunction'.
- My Team(s) or My Active Tickets:** A section with a search bar and a table with columns: 'Ticket Type (ITSM)', 'Raised On', 'Owner', 'Account', 'Title', 'Service', and 'Category Main'. A message states: 'No Tickets found for this Ticket. Select Add (+)'.
- Ticket Overview:** A section titled 'My Active Tickets' with a message: 'There are no Tickets in this view to create a Ticket Overview chart.'

2. **Incident Management:** An incident occurs when a customer receives an error or the quality of a service is reduced. Click **Incidents**.



3. **Web Submissions:** A ticket is submitted a number of different ways: Phone, Email, Chat and Portal. Alan Turing has submitted a ticket from the web portal. Click on ticket **INC-10014-2018**.



4. **Log:** Review the high-level information about the ticket.

The screenshot shows the Dynamics 365 Service Manager interface for an incident titled 'INC-10014-2018 - Surface will not wake up'. The incident is currently in the 'Log' stage, which is highlighted with a red box. The 'Log' stage shows the following fields:

- Category Main: click to enter
- Category Detailed: click to enter
- Urgency: 4-Low
- Impact: click to enter
- Responded To: No

The 'Categorize And Prioritize' stage is also visible, with a status of 'Active for 64 days, 1 hour'. The interface includes a top navigation bar with 'Dynamics 365', 'Service Mana...', and 'Incidents > INC-10014-2018 - S...'. The right side of the interface shows the 'Owner' as 'Chris Mahanes' and the 'Team' as 'Service Desk'. The bottom section of the interface shows a 'SUMMARY' tab with details about the incident, including the title, description, raised on date, and contact information.

5. **Summary:** Matches the information found in the log stage. Adds a section of reproduction steps.

The screenshot shows the Dynamics 365 Service Manager interface for an incident titled 'INC-10014-2018 - Surface will not wake up'. The incident is currently in the 'Summary' stage, which is highlighted with a red box. The 'Summary' stage shows the following fields:

- Category Main: click to enter
- Category Detailed: click to enter
- Urgency: 4-Low
- Impact: click to enter
- Responded To: No

The 'Categorize And Prioritize' stage is also visible, with a status of 'Active for 64 days, 1 hour'. The interface includes a top navigation bar with 'Dynamics 365', 'Service Mana...', and 'Incidents > INC-10014-2018 - S...'. The right side of the interface shows the 'Owner' as 'Chris Mahanes' and the 'Team' as 'Service Desk'. The bottom section of the interface shows a 'SUMMARY' tab with details about the incident, including the title, description, raised on date, and contact information.

6. **Categorization:** In this stage we need to document what type of issue it is by providing a Category Main. Then we can Detail the issue by selecting the appropriate rules.

General

SUMMARY

\*Title

Surface will not wake up

\*Description

When I select the power button my surface does not turn on

Raised On

3/7/2018 8:50 AM

\*Contact

Alan Turing (Sample)

Account

Sales (Sample)

ASSISTANT

All | Add Phone Call

There aren't any acti

7. **Additional Categorization:** Scroll down the left pane to see.

CATEGORIZATION

Ticket Template

-----

Service

Hardware Support & Acquisition

+ Service Instance

-----

Category Main

-----

Category Detailed

-----

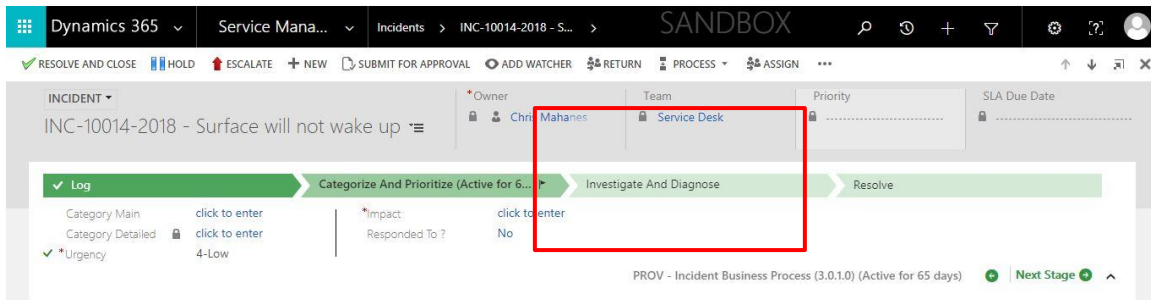
+ Related Asset

-----

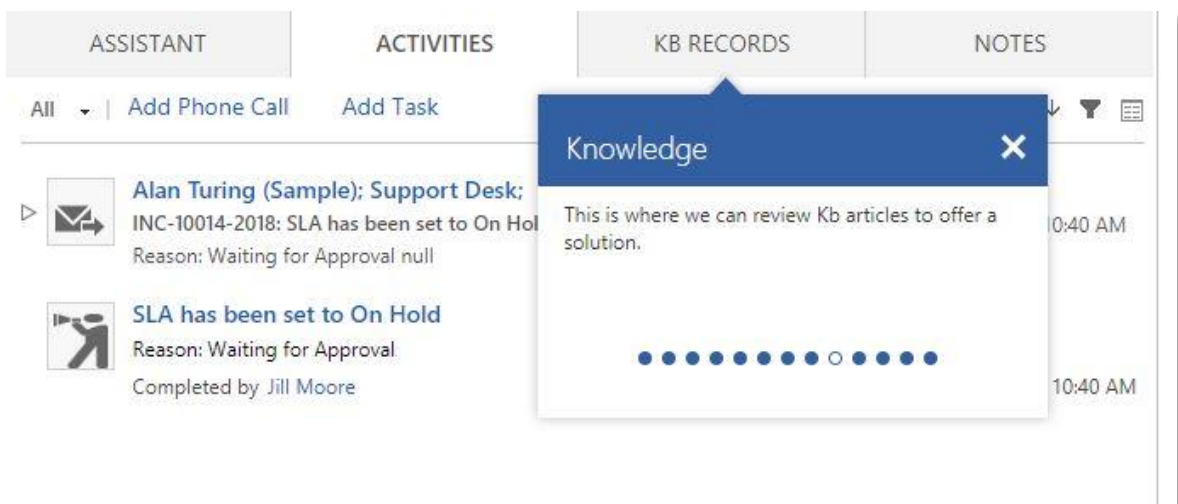
Configuration Item

-----

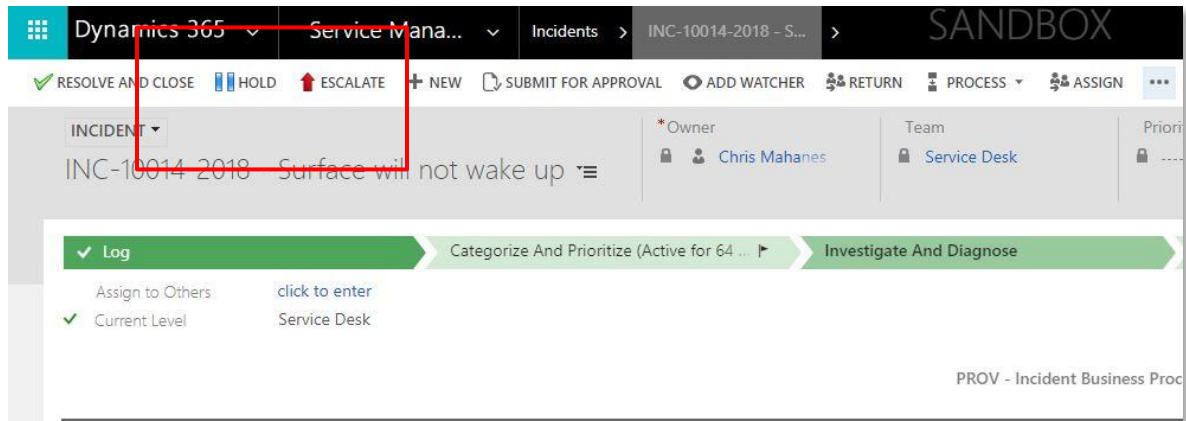
8. **Investigate:** This is the stage where we work with customer to offer a resolution. Where can we do this?



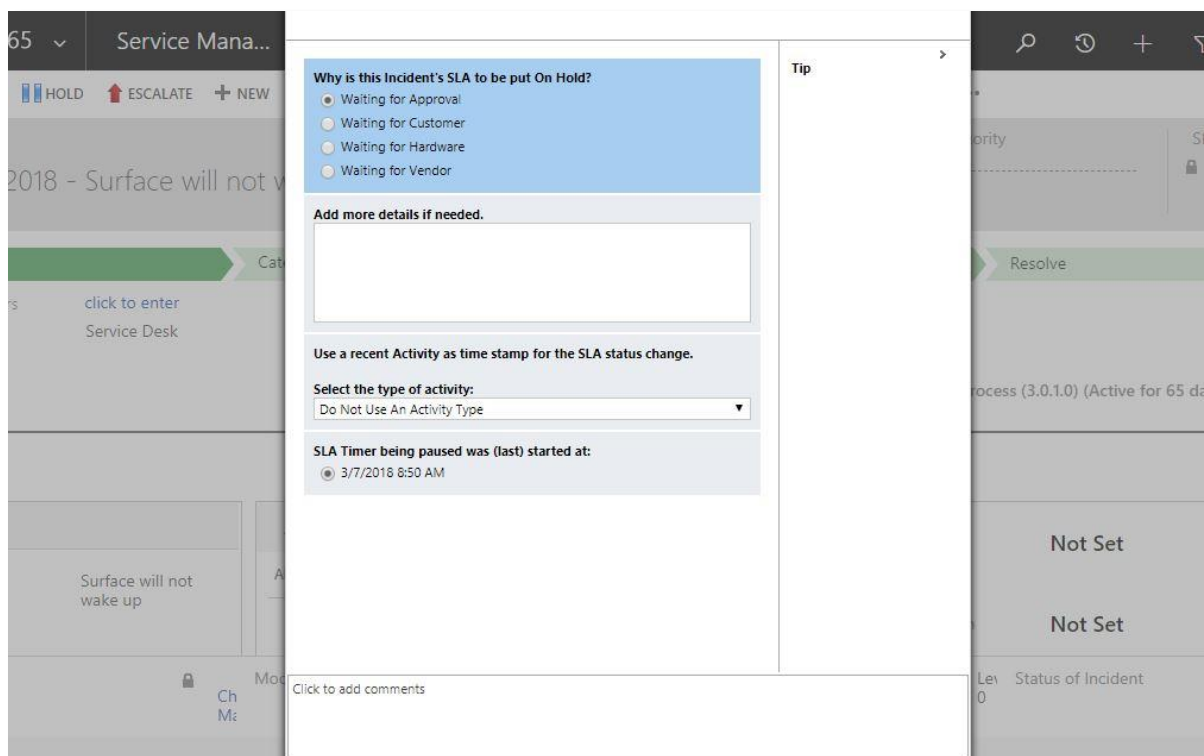
9. **Knowledge:** This is where we can review knowledgebase articles to offer a solution.



10. **Pause the SLA:** If additional information is needed or need to pause the SLA.



11. This dialog determines why the SLA is being put on hold. Also offers a backdate feature where if needed you can select an activity to back date the **On Hold** time to.



12. **Back Date SLA Timer:** If you sent an email and forgot to place the Incident on hold. You may select email and back date to the desired email that was sent.

Use a recent Activity as time stamp for the SLA status change.

Select the type of activity:

Do Not Use An Activity Type ▼

SLA Timer being paused was (last) started at:

☒ 3/7/2018 8:50 AM

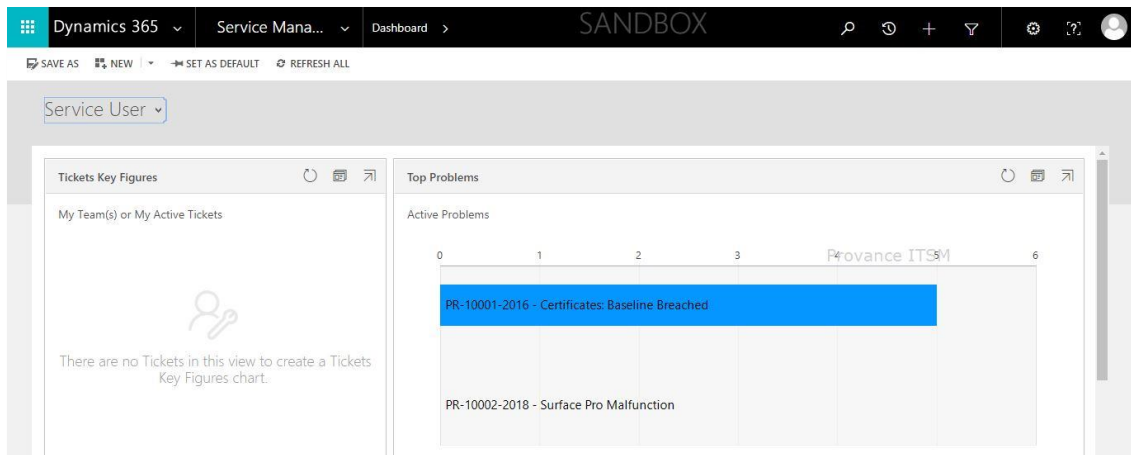
13. Click **Next**. The incident will be put on hold.

Click to add comments

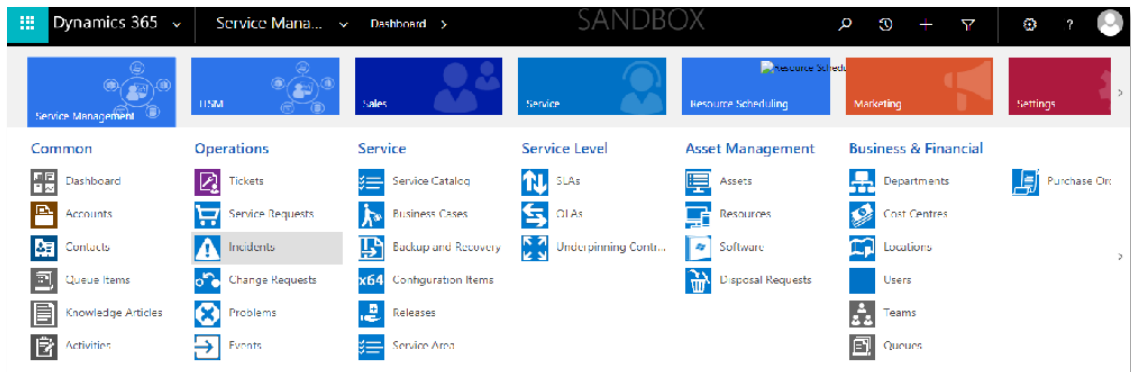
Help Summary Next Cancel

## Learning Path #4: Resume SLA & Associate

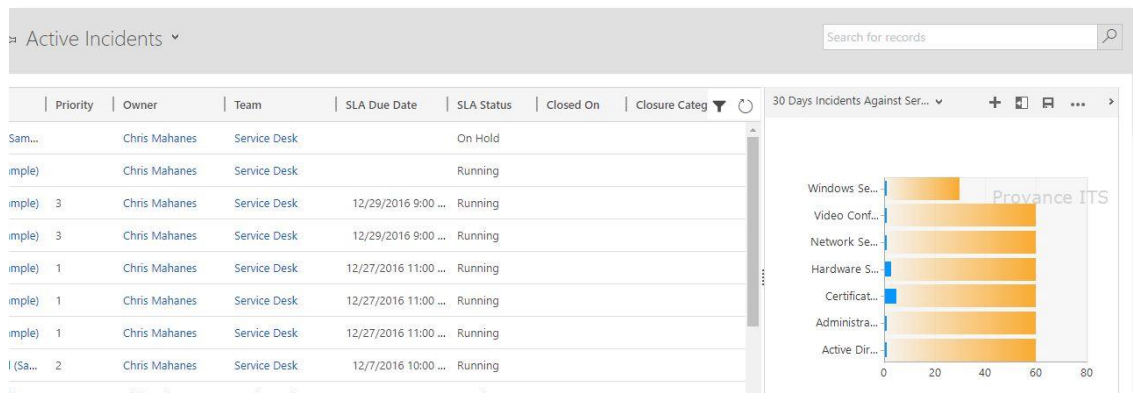
1. The navigation pane or site map shows some of the many other business applications available in Dynamics 365. This is the application platform that powers Provance ITSM. Click the **Service Management** drop down arrow to expand the site map.



2. The Service Management area provides access to ITSM specific options, one of which is Incident Management. Click **Incidents** to find one that we can resume.



3. **SLA Status:** One of the fields displayed in our list of active Incidents is the SLA Status. The SLA status indicates whether the SLA is running, on hold or completed. The chart pane to the right can be expanded to show a graphical view as well, for example a pie chart outlining how many are on hold vs. running. Custom charts can also be configured if required.



4. To resume the SLA, select this incident.

The screenshot shows the 'Active Incidents' table. The first row is highlighted with a red box. The table has columns: Name, Raised On, Service, Status of Incident, Account, Contact, and Priority.

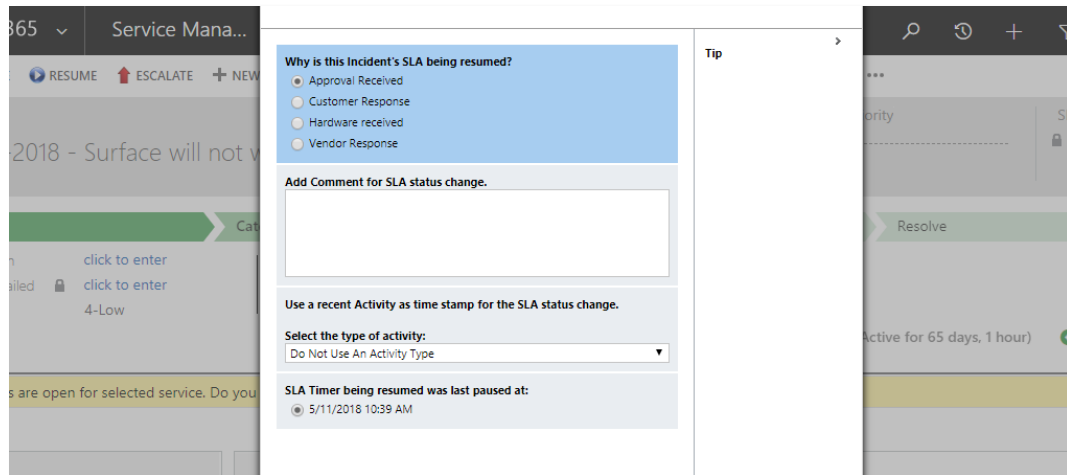
Name	Raised On	Service	Status of Incident	Account	Contact	Priority
INC-10014-2018 - Surface will ...	3/7/2018 8:50 AM	Hardware Su...	In Progress	Sales (Sample)	Alan Turing (Sam...	
INC-10013-2016 - Hardware Is...	12/26/2016 10:10 ...	Hardware Su...	In Progress	Internal Company...	Jon Snow (Sample)	
INC-10012-2016 - Demo - Rea...	12/26/2016 10:10 ...	Certificates	In Progress	Internal Company...	Jon Snow (Sample)	3
INC-10011-2016 - Demo - Rea...	12/26/2016 10:10 ...	Certificates	In Progress	Internal Company...	Jon Snow (Sample)	3
INC-10010-2016 - Demo - Rea...	12/26/2016 10:10 ...	Certificates	In Progress	Internal Company...	Jon Snow (Sample)	1

5. Resuming an SLA can be triggered by multiple events. For example, you have asked the customer to reboot. In this example, let's say the customer responds and you want to resume the SLA. Click **Resume** to resume the SLA.

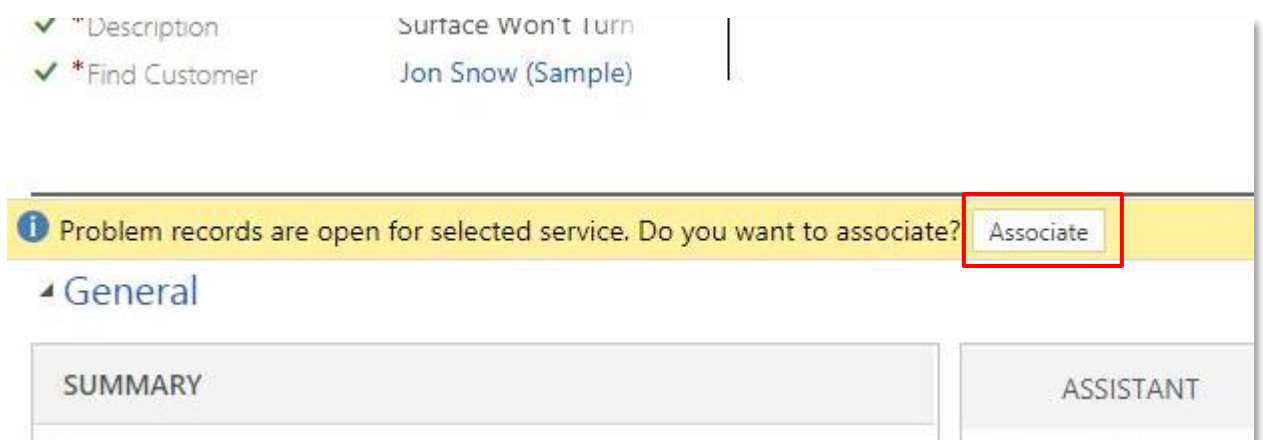
The screenshot shows the Dynamics 365 Service Manager interface. The top navigation bar includes 'Dynamics 365', 'Service Mana...', 'Incidents', and 'INC-10014-2018 - S...'. Below the navigation bar is a toolbar with buttons: RESOLVE AND CLOSE, RESUME, ESCALATE, NEW, SUBMIT FOR APPROVAL, ADD WATCHER, RETURN, PROCESS, and ASSIGN. The 'RESUME' button is highlighted with a red box. Below the toolbar is the incident details section, showing the incident name 'INC-10014-2018 - Surface will not wake up', the owner 'Chris Mahanes', and the team 'Service Desk'. At the bottom is a section for 'Log' and 'Categorize And Prioritize (Active for 6...)' with fields for Category Main, Category Detailed, Urgency, Impact, and Responded To?.

6. **Resume Selection Dialog Box:** Select the reason why the SLA is being resumed. Add any details required. You also have the option of choosing an activity associated with the incident to use as the time stamp for the resume action. For example, a customer sends an e-mail, but the agent only reads it a few hours later. Using the e-mail activity as the time stamp, rather than the agent's, ensures a more accurate resume statistic.

Click the **Close** button.

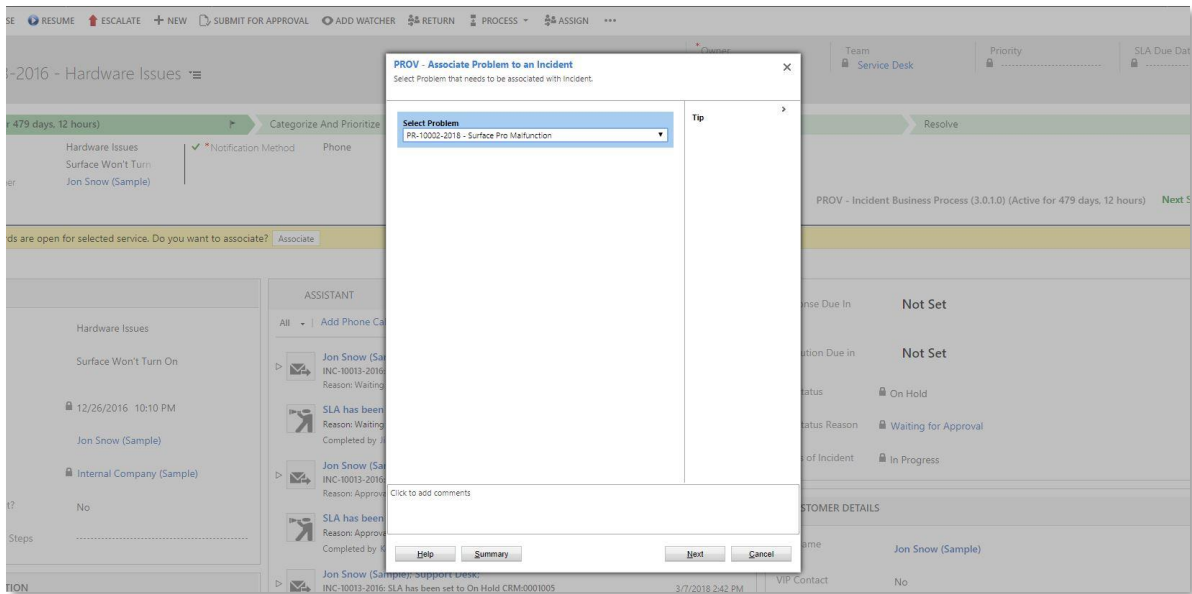


7. Let's look at how you can associate an incident to a problem. For example, there may be an underlying problem that causes several users to experience the same issue. As you can see in the screenshot below, the agent is notified that there is an underlying Problem open for the same Service. Click **Associate** to review the problem information.



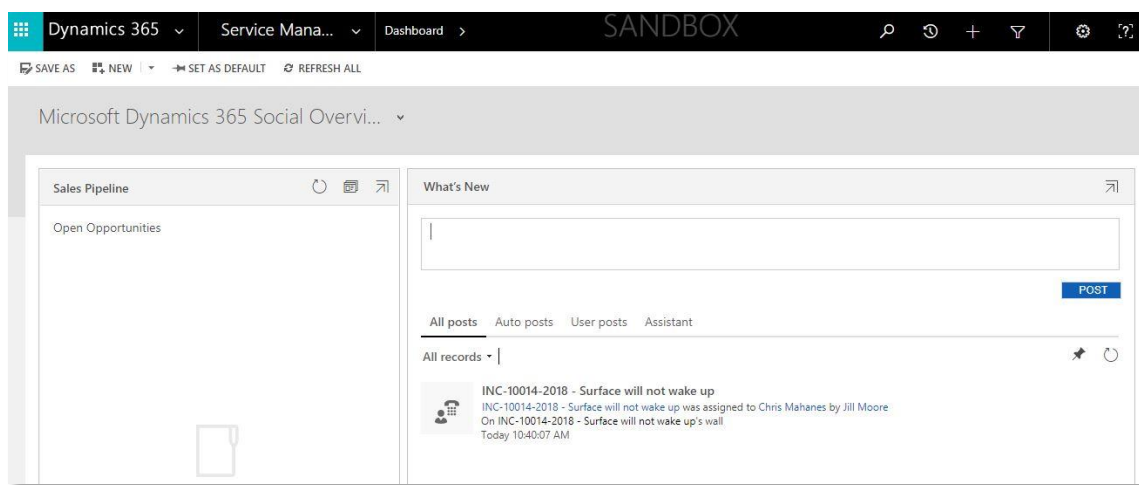
8. **Problem Record:** This list contains all the problems currently open for the same service. Use the problem to send updates to multiple end users with a single update, instead of having agents replicate the same information.

Select **Next** to associate the incident to the problem selected. By creating this association, you can effectively move on to the next incident because the root cause or potential workaround is dealt with by the team working through the problem. Any updates to the problem are passed through to the associated incidents.

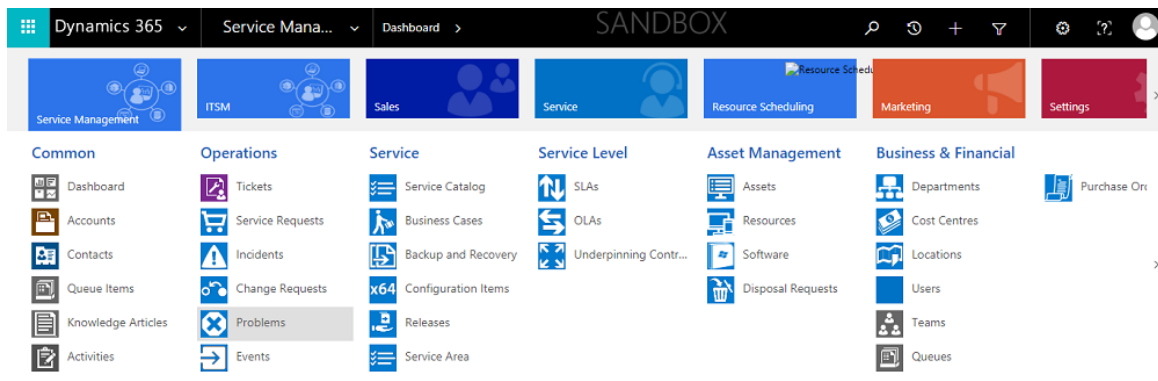


## Learning Path #5: Create a Bug

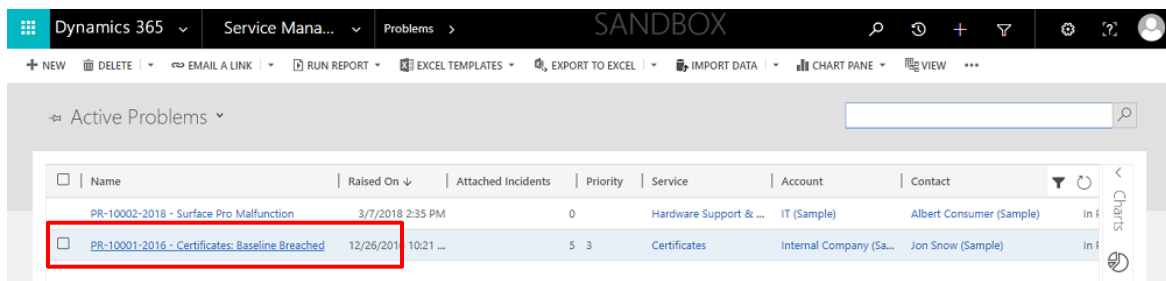
1. Work items can be created in TFS directly from Provance ITSM. Use them to log bugs for your development team. Click the **Service Management** drop down arrow to continue.



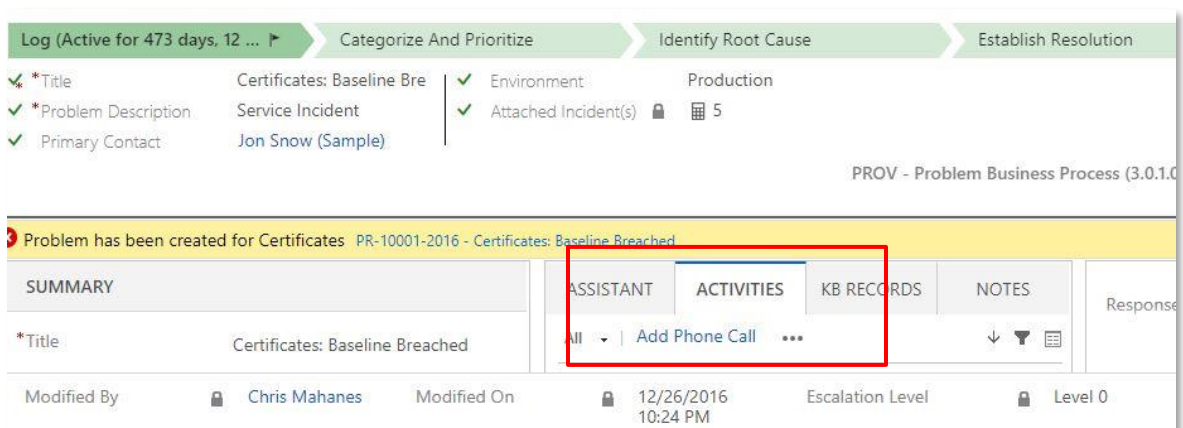
2. **Problem Management:** Create work items in TFS from all your tickets, including problems. Click **Problems** to continue.



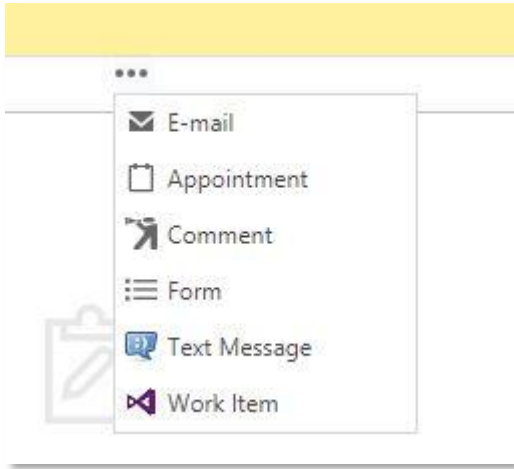
3. This problem needs to raise a TFS work item as a bug. Click the problem to begin.



4. Activities are used to track many items, such as tasks, appointments, e-mails, and even TFS work items. Let's see how to create a TFS bug. Select the ellipses drop down and select **Work Item**.



5. Work items can be generated and sent from Provance ITSM to VSTS (online) or to TFS (on premise). Select the **Work Item** activity.



6. Enter a title for the bug or task.

A screenshot of the Dynamics 365 Service Manager interface. The top navigation bar shows 'Dynamics 365', 'Service Mana...', and 'Activities > New Work Item'. Below the navigation bar are buttons for 'SAVE', 'SAVE & CLOSE', and 'FORM EDITOR'. The main section is titled 'WORK ITEM : INFORMATION' and 'New Work Item'. Under the 'General' tab, the 'Subject' field is marked with a red asterisk and a red 'x' icon, indicating it is a required field.

- Provide details for the Development team. As you can see in the screenshot below, Project is an option set. If you have multiple projects, simply update the option set to include the projects that the development team is working on. In the Work Item Type field, decide whether the work item is a bug or a task. Save the record, then you can then submit to TFS.

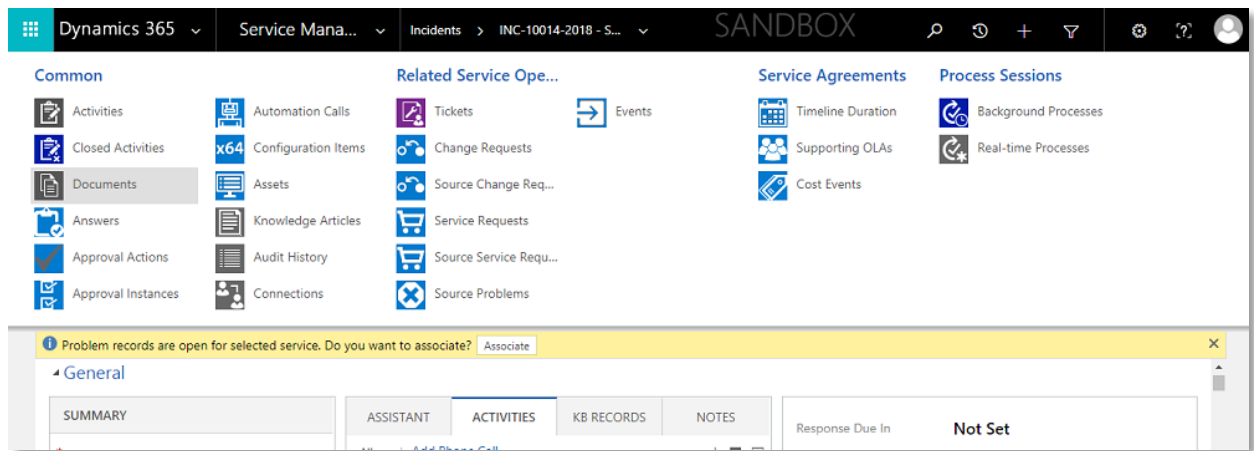
Regarding	PR-10001-2016 - Certificates: Baseline Breached
Project	
Priority	Normal
Work Item Type	Task
Status Reason	Draft

## Learning Path #6: Office Integrations

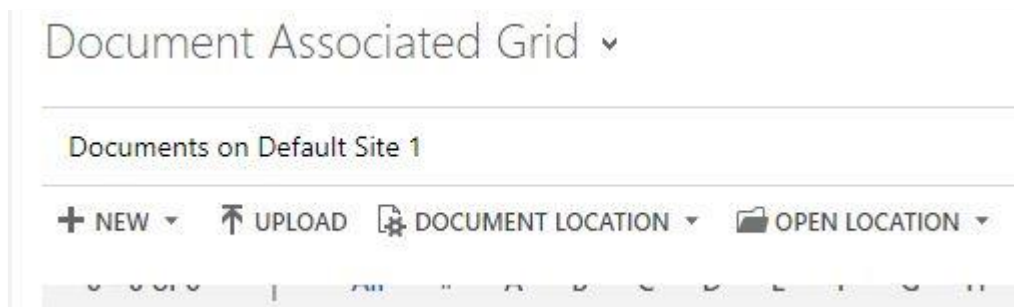
- At times, there are Visio, videos or screenshots that we want to track against the incident. We can do this by using the SharePoint integration by selecting the **Extended Menu**.

The screenshot displays the Dynamics 365 Service Manager interface. At the top, the navigation bar shows 'Dynamics 365', 'Service Manager', and 'Incidents'. The current incident is 'INC-10014-2018 - Surface will not wake up'. The 'Extended Menu' is highlighted with a red box, showing options like 'Owner', 'Team', 'Priority', and 'SLA Due Date'. The incident is currently in the 'Log' stage of the 'PROV - Incident Business Process (3.0.1.0)'. The 'Log' stage includes fields for 'Category Main', 'Category Detailed', 'Urgency', 'Impact', and 'Responded To?'. The 'Urgency' is set to '4-Low'. The 'Impact' is 'No'. The 'Responded To?' is 'No'. The 'Next Stage' is 'Investigate And Diagnose'. The 'Resolve' stage is also visible. The 'General' tab is selected, showing the 'SUMMARY' section with the title 'Surface will not wake up'. The 'ASSISTANT' section shows 'Add Phone Call'. The 'KB RECORDS' and 'NOTES' sections are empty. The 'Response Due In' is 'Not Set'.

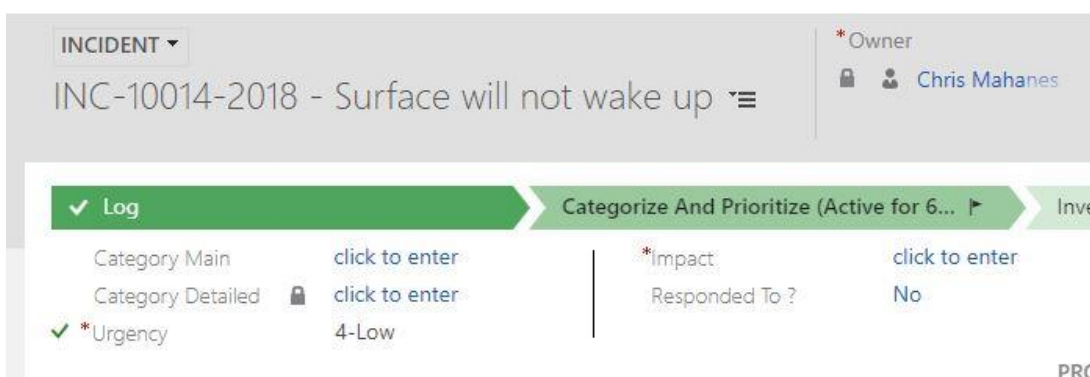
- After enabling the SharePoint Integration, we can add them by selecting **Documents**.



- New Document: If you would like to create a new Word, Excel, or PowerPoint document, we can create them directly from the Incident  
Upload Document: If you have a document you want to track on this Incident, we can easily upload the Incident.



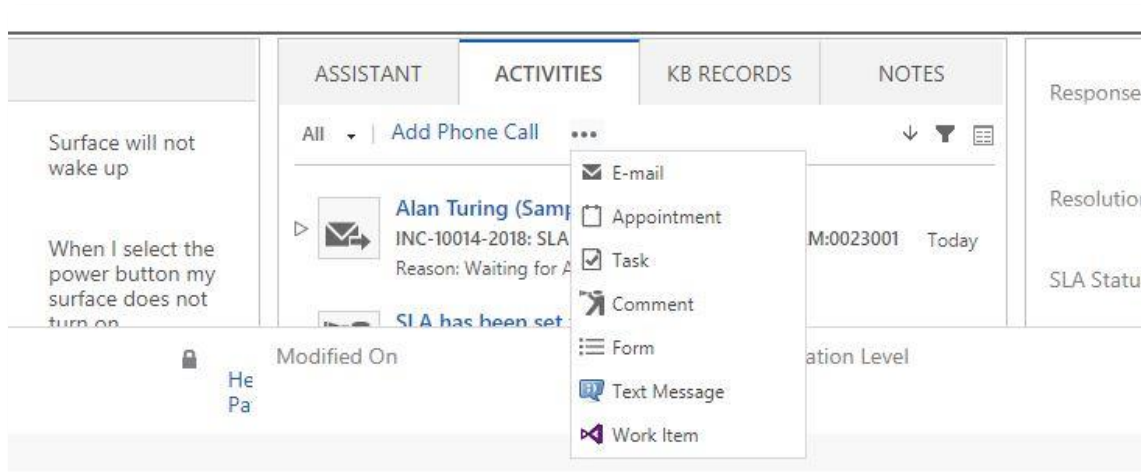
- Let's look at a few other office integrations we can leverage. Click on the ticket **INC-10014-2018-Surface will not wake up**.



5. Activities: With the Service Side Synchronization, we can create additional activities. Select the ellipses to view more.

Emails: We can create and view emails that have been tracked against this Incident. We don't need to leave ITSM to send/receive email from outlook!

Meetings/Appointment: Scheduling meetings with a customer is a breeze. Just select an appointment and create the meeting in regards to this Incident.



6. Calling: Need to call the customer? No problem with the skype for business integration. Once you select the phone number a Skype for Business call will open.

