CA Service Desk Manager – A Look Ahead

Raymond Cadden
Kenneth Laufmann
Terms of This Presentation

This presentation was based on current information and resource allocations as of October 2009 and is subject to change or withdrawal by CA at any time without notice. Notwithstanding anything in this presentation to the contrary, this presentation shall not serve to (i) affect the rights and/or obligations of CA or its licensees under any existing or future written license agreement or services agreement relating to any CA software product; or (ii) amend any product documentation or specifications for any CA software product. The development, release and timing of any features or functionality described in this presentation remain at CA’s sole discretion. Notwithstanding anything in this presentation to the contrary, upon the general availability of any future CA product release referenced in this presentation, CA will make such release available (i) for sale to new licensees of such product; and (ii) to existing licensees of such product on a when and if-available basis as part of CA maintenance and support, and in the form of a regularly scheduled major product release. Such releases may be made available to current licensees of such product who are current subscribers to CA maintenance and support on a when and if-available basis. In the event of a conflict between the terms of this paragraph and any other information contained in this presentation, the terms of this paragraph shall govern.
For Informational Purposes Only

Certain information in this presentation may outline CA’s general product direction. All information in this presentation is for your informational purposes only and may not be incorporated into any contract. CA assumes no responsibility for the accuracy or completeness of the information. To the extent permitted by applicable law, CA provides this document “as is” without warranty of any kind, including without limitation, any implied warranties or merchantability, fitness for a particular purpose, or non-infringement. In no event will CA be liable for any loss or damage, direct or indirect, from the use of this document, including, without limitation, lost profits, lost investment, business interruption, goodwill, or lost data, even if CA is expressly advised of the possibility of such damages.
Agenda

> Roadmap
> CA Service Desk Manager Next Release Overview
> Review of Marquee Features
> Signup for Beta
> Questions
CA Service Desk Manager Releases

CA SDM r12.1
- Change Management Features

Updated CA CMDB Reconciliation
- Improved Reconciliation Infrastructure

CA SDM / SAP Integration
- Bidirectional ticket updates with SAP Solution Manager

CA SDM r12.5
- Enhanced Multi-tenancy
- Status Transition Control
- Granular Administration
- Email Approve/Reject
- Enhanced CMDB Reconciliation
- CA ITAM Alignment

2009

October 12, 2009    CA Service Desk Manager – A Look Ahead - The Next Release    Copyright © 2009 CA
## CA Service Desk Manager r12.5

<table>
<thead>
<tr>
<th>Marquee Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhanced Multi-tenancy*</td>
<td>Shared multi-tenancy across CA Service Management solutions, including a shared hierarchical structure and sub-tenant feature supporting each unique tenant, without the cost and complexity of multiple software instances.</td>
</tr>
<tr>
<td>Enhanced CI Reconciliation*</td>
<td>Enhanced reconciliation and synchronisation capabilities to make these features easier, faster and more efficient; recognise exemptions and allow duplicate CIs to be merged/deregistered.</td>
</tr>
<tr>
<td>Enhanced Status Transition Control*</td>
<td>Ability to restrict the statuses a user can move a ticket to based on current status; when in a given status an administrator can configure if certain fields on the ticket are read only or required.</td>
</tr>
<tr>
<td>Automated Closure of Resolved Incidents</td>
<td>After an analyst resolves a ticket, automatically close the ticket after a configurable number of days if there is no update from the analyst or end user.</td>
</tr>
<tr>
<td>Enhanced Granular Security*</td>
<td>Ability to assign security at a more granular level, (e.g. can update announcements, but not CI’s, etc.)</td>
</tr>
</tbody>
</table>
# CA Service Desk Manager r12.5

<table>
<thead>
<tr>
<th>Marquee Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Integration and Notification Improvements</td>
<td>Ability to update a ticket or workflow task via an email reply; several enhancements to improve email integration including supporting multiple email inboxes.</td>
</tr>
<tr>
<td>Automated Priority Calculation*</td>
<td>Data-driven calculation of the priority field for incident and problem management based on urgency and impact and/or unique processes; provide flexibility to define how this calculation will be done as it drives SLA's and other key events.</td>
</tr>
<tr>
<td>Improved Integration with CA IT Asset Manager</td>
<td>Provide a shared classification structure key owned resource hierarchies.</td>
</tr>
<tr>
<td>Improved Support Automation Integration</td>
<td>Provide common multi-tenancy, role definition and identity management, unified install, streamlined session initiation, adopt CA Service Desk Manager licensing model, and integrated documentation.</td>
</tr>
<tr>
<td>New Support Automation User Interface</td>
<td>User Interface integrated with CA Service Desk Manager and includes new thumbnail views, queue summary, file transfer tool and alerts/diagnostics.</td>
</tr>
</tbody>
</table>
Feature Distribution

**KNOWLEDGE MANAGEMENT**
- Link Knowledge Documents to Additional Objects
- Security Enhancements
- Granular Tracking of all Interactions Thru Self-Service & Knowledge
- Knowledge Mgmt to use Service Desk Notification Engine
- Improvements to Flag & Fix

**INCIDENT/PROBLEM/CHANGE MANAGEMENT**
- Status Transition Control
- Automatic Priority Calculation
- Target Resolution & Response Times
- Email Integration & Notification Enhancements
- Administration Improvements
- Search Filter / List Improvements
- Self-Service Improvements
- Auto-Close Tickets
- Improved System High Availability & Failover
- Improved Auto-Assignment
- Updating Child Tickets from Parent
- Delegate Users
- Multi-Language Support
- Multi-Tenancy Improvements
- Performance Enhancements
- Ticket Recording/Editing Improvements
- VIP/Special Handling User Indicator
- Service Outage Fields
- Major Incident Support
- Improve Tracking of Ticket Entry Point
- Improved Maintenance and Upgrade Procedures
- Ticket Efficiency Tracking and Reporting
- Reports & Metrics
- Usability

**CONFIGURATION MANAGEMENT**
- Multi-Tenancy Support for CIs
- Enhancements - Reconciliation/Data Population of CMDB
- Auditing of All Edits to a Owned Resource (CI/Asset)
- Service Criticality Attribute
- CI Maintenance and Critical Uptime Windows
- Administration Enhancements
- Link to related knowledge documents on CI
- Additional Linked Groups to Support Assignment
- Relationship Enhancements
- Implementation / Supportability Enhancements
- Reporting and Metrics
- ITAM-APM Integration
- SLM Integration
- Integration with Service Catalog
- CMDBf Federated Attribute Client Viewer

**COMMON SOLUTION & SUPPORTABILITY**
- Common component enhancements
- CAPA Content

**SUPPORT AUTOMATION**
- Enhance SDM integration
- New analyst UI
- Remote Control recording

**ENFORCE CONSISTENT NOMENCLATURE**
- Real-time Reports migration
- Historical reporting

**REPORTING**
- Compatibility and Interoperability
- Compatibility with Other CA and 3rd party products
- Backward Compatibility with Prior Versions

**INSTALLATION**
- End User Installation and Remote / Silent Install
- Upgrade and Migration
Selected Feature Review

> Multi-Tenancy
> CI Reconciliation
> Status Transition
> Priority calculation
> Service Target Templates
> UI Improvements
> Granular Function Access Security
> Others to note
Multi-Tenancy Enhancements

> R12 introduced tenants
  - Every tenant is isolated

> R12.5 introduces hierarchical structure of tenants
  - “super-tenants” and “sub-tenants”
  - Share business rules and data with parent tenant
  - Flexible read/write access rules
Multi-Tenancy: Sub-tenants

> Hierarchical structure of Tenants

- Any tenant (except Service Provider) can have a parent; multiple hierarchies supported
- Hierarchical structure not required; R12 model of "isolated" tenants still supported
Sub-tenants and Data Sharing

> Hierarchy, combined with flexible read/write authorisation, permits “data pushing” from tenants to subtenants

> Examples

- Category belonging to Tenant A can be referenced by tickets belonging to Tenants A, B or C
- Category belonging to Tenant B can be referenced by tickets belonging Tenant B and Tenant C, but not by tickets belonging to Tenant A
Status Transitions

> Restrict valid ticket Status values based on current status
Status Transitions

> Directed graph for ticket Status values

- For example: a Request in Open status may only be set to Acknowledged, Closed or Cancelled
- Restrict status change with optional condition check

![Request Transition Detail](image)
Status Transitions: Employee/Customer Interface

> Customer/Employee can display convenience buttons to update to next valid status value(s)
Status Transistions - Attribute Control

> Mark fields as Required or Locked depending on Status value
Priority Calculation

> Priority for Incidents and Problems derived from Impact and Urgency values
  ▪ Aligns with ITIL good practices

> Defined defaults for Urgency and Impact may be adjusted by the;
  ▪ Affected CI
  ▪ Affected end user
  ▪ Blackout window
  ▪ Ticket Area

> Optionally capture reason for manual Urgency/Impact override
# Configuring Priority Calculation

## Priority Calculation Detail

<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
<th>Incidents</th>
<th>Problems</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default</td>
<td>Active</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### Description

Default Priority Calculation Matrix

#### Priority Matrix

<table>
<thead>
<tr>
<th>Impact</th>
<th>1-Immediate</th>
<th>2-Very Quickly</th>
<th>3-Quickly</th>
<th>4-Soon</th>
<th>5-As Possible</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Entire organization</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>2-Multiple Groups</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>3-Single Group</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>4-Small Group</td>
<td>3</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>5-One person</td>
<td>4</td>
<td>None</td>
<td>4</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

### Priority Calculation Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact Default</td>
<td>3-Single Group</td>
</tr>
<tr>
<td>Override Impact</td>
<td>YES</td>
</tr>
<tr>
<td>Impact Increment</td>
<td>1</td>
</tr>
<tr>
<td>Urgency Default</td>
<td>2-Very Quickly</td>
</tr>
<tr>
<td>Override Urgency</td>
<td>YES</td>
</tr>
<tr>
<td>Urgency Increment</td>
<td>1</td>
</tr>
<tr>
<td>Capture Reason</td>
<td>NO</td>
</tr>
</tbody>
</table>

- Default Ticket Impact Value
- Override the ticket’s impact with the impact of the attached Affected Service.
- Increment the ticket’s impact with this value if the ticket’s open date is within a blackout window.
- Default Ticket Urgency Value
- Override the ticket’s urgency with the urgency of the Ticket’s Area.
- Increment the ticket’s urgency with this value if the ticket’s Affected End user has the Escalate Ticket Urgency flag set.
- Require the user to enter a justification for manually modifying a ticket’s Urgency or Impact.
Service Target Templates

> Targets associated with Service Type
  - Milestones to achieve over the ticket lifecycle

<table>
<thead>
<tr>
<th>Service Type List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Types In Effect</td>
</tr>
<tr>
<td>Service Type</td>
</tr>
<tr>
<td>Priority 2 Resolution</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Service Targets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
</tr>
<tr>
<td>Assigned</td>
</tr>
<tr>
<td>Set Actual</td>
</tr>
<tr>
<td>First Resolution</td>
</tr>
<tr>
<td>Second Resolution</td>
</tr>
</tbody>
</table>

Copyright © 2009 CA
Service Target Templates

> Targets set automatically (via conditions) or by manual action
  - Targets evaluated with every update
> Records when target was achieved
  - Time Left shows time to spare (or how late)

<table>
<thead>
<tr>
<th>Service Targets</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Action</strong></td>
</tr>
<tr>
<td>Assigned</td>
</tr>
<tr>
<td>Analyst Response</td>
</tr>
<tr>
<td>First Resolution</td>
</tr>
<tr>
<td>Second Resolution</td>
</tr>
</tbody>
</table>
UI Improvements: Sorting, Export

> Sort by any column on most list screens
  - Supports “combined” sorts, custom columns
  - Virtual ("LOCAL") sort not supported

> Export to MS Excel available on most list forms
  - Sends file in XML format
Granular Function Access Security

> Function Access provides basic object-level access
  - None, View or Modify Access

> Prior releases distributed objects among eight function access groups
New Granular Function Access Security

> Function Access Groups are now data
  - Add your own, reassign objects via Web Screen Painter
> Thirty-six out-of-box Function Access Groups

<table>
<thead>
<tr>
<th>Function Access to Role List</th>
<th>Code</th>
<th>Access Level</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>admin</td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>Announcement</td>
<td>announcment</td>
<td>Modify</td>
<td></td>
</tr>
<tr>
<td>Change Order</td>
<td>change_mgr</td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>Change Order Reference</td>
<td>change_reference</td>
<td>Modify</td>
<td></td>
</tr>
<tr>
<td>Change Order Template</td>
<td>change_mgr_template</td>
<td>Modify</td>
<td></td>
</tr>
<tr>
<td>Configuration Item</td>
<td>c</td>
<td>Modify</td>
<td></td>
</tr>
<tr>
<td>Configuration Item Common Read Only</td>
<td>c_common_ro</td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>Configuration Item Reference</td>
<td>c_reference</td>
<td>Modify</td>
<td></td>
</tr>
<tr>
<td>Contact</td>
<td>contact</td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>Group</td>
<td>group</td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>Incident/Problem/Request</td>
<td>call_mgr</td>
<td>Modify</td>
<td></td>
</tr>
<tr>
<td>Incident/Problem/Request Reference</td>
<td>call_mgr_reference</td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>Incident/Problem/Request Template</td>
<td>call_mgr_template</td>
<td>Modify</td>
<td></td>
</tr>
<tr>
<td>Inventory</td>
<td>inventory</td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>Issue</td>
<td>issue_mgr</td>
<td>None</td>
<td></td>
</tr>
</tbody>
</table>
Additional Features

> Events on Activity Logs
  - Extend Activity Logging to Contacts and Configuration Items

> Unified Install
  - Install and configure all SDM components in a common interface

> Contact Special Handling
  - Visual cues for Contacts requiring specific attention, e.g. VIP, Renewal In Progress, etc.
And More

> New Integrations
  - Catalyst Integration Framework

> Re-factored “LRELs”
  - Enabling easier sorting and querying of many-to-many relationships

> Faster, more convenient Manual Notify
Interested in Beta?

> CA Service Deck Manager r12.5 Beta
  ▪ Beta Starts Dec 1 2009
    – On site Beta
    – Betas on Demand

> For more information or to sign up today
Questions