Creatio Academy

Problems

Manage problems

Version 8.0

Table of Contents

Manage problems

PRODUCTS: SERVICE ENTERPRISE

Creatio implements the "Problem management" ITSM process in the [*Problems*] section. Use this section to manage registered problems and plan the working time for problem resolution. Effective problem management decreases the influence of cases on service performance and prevents further cases.

A “problem” is the root cause of one or more occurred (possible) cases. For example, frequent breakdowns of a certain product node can be identified as a “problem.”

Identify problems

Identify problems by analyzing multiple similar incidents and determining their common cause. Multiple incidents linked to the same service or configuration item, indicate a problem with that element of the IT infrastructure or the elements it depends on. To identify the faulty element:

- Check the values of the [*Service*] and [*Configuration item*] fields on the incident page.
- Check the dependencies of the incident service and configuration item using the service model on the case page.

Once the problem has been identified, proceed with the problem registration:

1. Add a new record in the [*Problems*] section. There are several ways you can do so:
   a. Go to the [*Problems*] section and click [*New*].
   b. To add a problem from the incident page, go to the [*Closure and feedback*] tab → [*Problems*] → + → [*New*].
2. Populate the fields on the problem page:

Subject	Brief description of the problem.
Description	Detailed description of the problem. For example, specify the circumstances that contributed to the problem cause or its influence on service availability.
Owner	Service team member who is responsible for resolving the problem.
Assigned team	Group of specialists within the department who are responsible for resolving the selected problem. You can customize user groups as the elements of the organizational structure in the [*Roles and users*] section.
Priority	Relative importance of resolving the problem.

3. Populate the fields on the [*Problem profile*] tab of the problem page:

Type	Select the problem type, e.g., “Known error” or “Problem”.
Service	Specify the service where the problem is. Resolving the problem would require making changes to this service.
Configuration item	Specify the configuration item where the problem is. Resolving the problem would require making changes to this CI.

4. Add incidents that are caused by the problem to the [*Cases*] detail by clicking [*Problem profile*] → [*Cases*] → + and selecting checkboxes next to the corresponding incidents.
5. Click [*Save*].

   As a result, a new problem record will be created. And the incidents caused by the problem will be added to the [*Cases*] detail of the problem page.

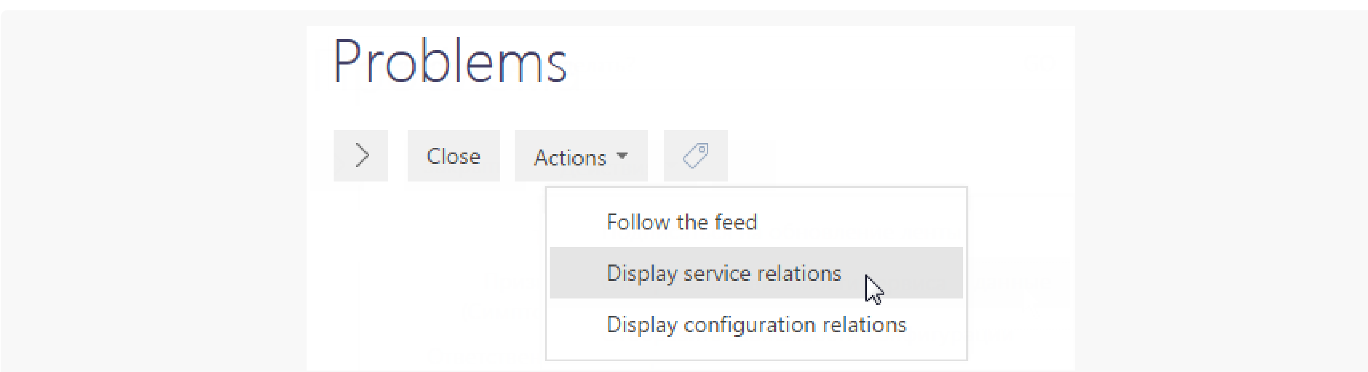
Determine the scope of a problem

Because of the complexity and interdependence of various elements in the IT infrastructure, the scope of a problem may be larger than simply the cases connected to the faulty service or CI. Use the service model to check other infrastructure elements that may be affected by the problem. As a result, additional incidents may be linked to the problem.

To view relations between a service and a configuration item:

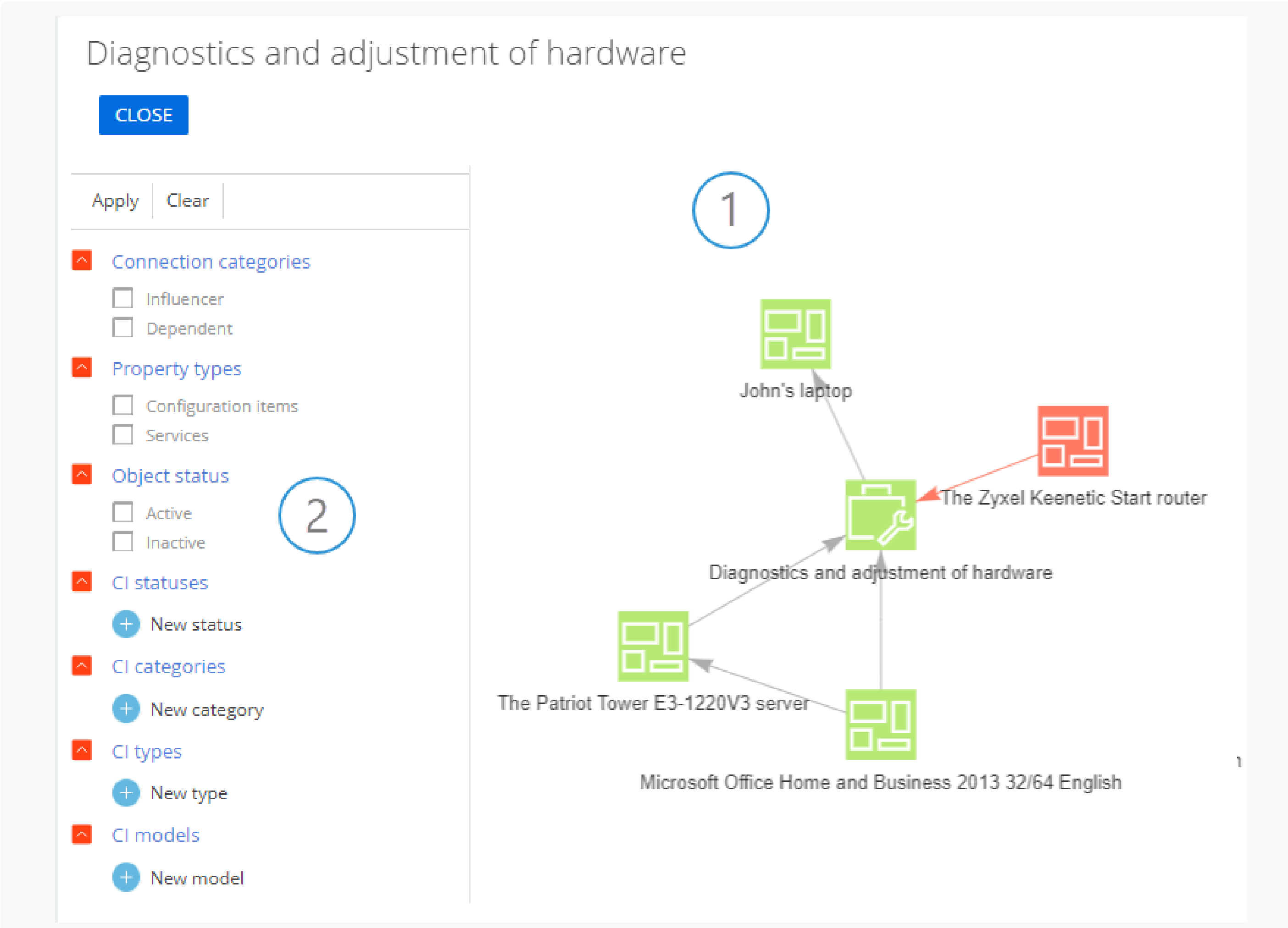
1. Open the [*Problems*] section.
2. Select a record in the section list and click [*Open*].
3. In the [*Actions*] menu of the problem page, select the [*Display configurations relations*] or [*Display service relations*] option (Fig. 1).

Fig. 1 The [*Display service relations*] action



As a result, a service connection diagram for the selected IT infrastructure item will display (Fig. 2).

Fig. 2 Service connections within the model



1. The [*Display service relations*] action opens a connection diagram for the service specified in the [*Service*] field of the problem page.
2. The [*Display configuration relations*] action opens a connection diagram for the configuration item specified in the [*Configuration item*] field of the problem page.

   As a result of using the connection diagrams, a service team specialist can define which IT infrastructure items cause the current problem. The faulty item of the IT infrastructure is considered the most probable reason for service delivery failure.

> **Note.** Learn more about working with the connection diagram in the "Use service model for case management" article.

Resolve and close problems

The problems are resolved by finding temporary workarounds or making changes to the IT infrastructure. Once a solution to a problem is implemented, the problem management process requires that the corresponding problem is marked as "resolved" and eventually – "Closed."

To do so:

1. Open the resolved problem page. There are several ways you can do this:

   a. Go to the [*Problems*] section, select the needed record, and click [*Open*].

   b. To open a problem from the change page, go to the [*Classification*] tab → [*Problems*] and click the needed problem record.

2. In the [*Status*] field of the problem page, select the needed status:

   a. Select “Resolved” when the change has been implemented, or if a workaround has been accepted temporarily.

   b. Select “Closed” when you have a confirmation that the problem has been eliminated as part of a change.

3. Populate the fields on the [*Resolution*] tab:

Resolution	Describe how the problem was resolved as a result of the change.
Actual resolution time	Date when the problem was resolved.
Closed on	Date when the problem was finally closed.

4. Click [*Save*].