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**Definition**

IT service management (ITSM) is a discipline for managing information technology (IT) systems, philosophically centered on the customer's perspective of IT's contribution to the business. ITSM stands in deliberate contrast to technology-centered approaches to IT management.

Service-Oriented Architecture (SOA) is an Information Technology and system architecture design approach built around computer services and components that are reused and recombined easily using a standard interface.

In an SOA, software and application components advertise themselves on a network offering a service to other software and components. A customer service system could provide a look-up that a credit application and financial management system could use. That is in contrast with a traditional approach where each of the three applications would have to create the same function that conformed to each individual application architecture.
ITIL 3.0 is structured around the core of the service provided. ITIL has five components:

- **Service Strategy**
- **Service Design**
- **Service Transition**
- **Service Operation**
- Continual Service Improvement

This template is in compliance with the ITIL v3.0 standard and has a service focus. The processes that are addressed in that standard are:

- Access Management
- Availability Management
- Capacity Management
- Evaluation
- Event Management
- Financial Management (aka Service Economics)
## Service Request - Help Desk Priority Matrix & Process Flow Charts

<table>
<thead>
<tr>
<th>Priority</th>
<th>P1</th>
<th>P2</th>
<th>P3</th>
<th>P4</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>Multiple Users / No Workaround</td>
<td>Multiple Users Workaround Available; Single User / No Workaround; VIP</td>
<td>Single User / Workaround</td>
<td>Scheduled Requests</td>
</tr>
<tr>
<td><strong>Acknowledgment</strong></td>
<td>10 min.</td>
<td>30 min.</td>
<td>1 hr.</td>
<td>8 hrs.</td>
</tr>
<tr>
<td><strong>Resolution</strong></td>
<td>ASAP</td>
<td>4 hrs.</td>
<td>8 hrs.</td>
<td>per agreement</td>
</tr>
<tr>
<td><strong>Assignment</strong></td>
<td>15 min. Help Desk, assign to SWAT</td>
<td>15 min. Help Desk, assign to lead or analyst</td>
<td>15 min. Help Desk, assign to analyst</td>
<td>Help Desk</td>
</tr>
<tr>
<td><strong>Missed Acknowledgement</strong></td>
<td>Notify management with Hourly updates until acknowledgment received</td>
<td>Reminder Page</td>
<td>Reminder Page</td>
<td>Reminder Page</td>
</tr>
<tr>
<td><strong>50% to Resolution Time</strong></td>
<td>N/A</td>
<td>Notify management; Notify Lead; Metrics Report</td>
<td>Notify management; Notify Lead; Metrics Report</td>
<td>Notify management; Notify Lead; Metrics Report</td>
</tr>
<tr>
<td><strong>Proactive Notification</strong></td>
<td>Hourly Updates to Help Desk. Coordinator</td>
<td></td>
<td>Reminder email 8 hours prior to resolution</td>
<td></td>
</tr>
<tr>
<td><strong>Missed Resolution</strong></td>
<td>N/A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Escalation Level</strong></td>
<td>N/A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Notification Level</strong></td>
<td>Automatic or Manual Email to CIO within 30 minutes; Page IT Managers, IT Directors</td>
<td>Metrics Report</td>
<td>Metrics Report</td>
<td>Metrics Report</td>
</tr>
</tbody>
</table>

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Help Desk Triage

- Call In
  - Open Ticket
    - Prioritize Call
      - Call is resolved on phone
        - Yes
          - Set Ticket Status to Resolved
            - Yes
              - Customer Acknowledges Solution
                - No
                  - Close Ticket
                    - Yes
                      - No
                        - P1 Ticket Flow
                          - P2 Ticket Flow
                            - P3 Ticket Flow
                              - P4 Ticket Flow

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**P1 Tickets**

- **P1 Call Logged - Ticket Opened**
  - Assign Ticket to SWAT Team (15 min.)
  - Auto/Manual E-mail to CIO 30 min. following ticket opening.

- **Page IT Managers and Directors**
  - SWAT Team Acknowledgment within 10 min.
    - Yes: SWAT Team assesses problem
      - Reassess
      - Reassign
    - No: Notify Management w/ hourly updates

- **SWAT Team assesses problem**
  - Reassign

- **Reassess**
  - Yes: **Set Ticket status to Resolved**
  - No:
    - No: **Customer Acknowledges Solution**
    - Yes: **Close Ticket**

- **Notify Management and CIO**

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Content Included as Separate Attachments

The content for the items listed below is updated frequently. We have opted to include those items individually so they can be updated without having to update this extensive document with those revisions. The Items are:

Policies
- Blog and Personal Web Site Policy
- BYOD Policy
- Internet, e-Mail, Social Networking, Mobile Device, Electronic Communications, and Record Retention Policy
- Sensitive Information Policy
- Travel, Electronic Meeting, and Off-Site Meeting Policy

Electronic Forms and Questionnaires
- Business and IT Impact Analysis Questionnaire - Tool
- Blog Policy Compliance Agreement - Form
- BYOD Access and Use Agreement - Form
- Change Control Request - Form
- Email - Employee Acknowledgment - Form
- Internet Access Request - Form
- Internet & Electronic Communication - Employee Acknowledgment - Form
- Internet Access Request - Form
- Security Access Application - Form
- Sensitive Information Policy Compliance Agreement - Form
- Social Networking Policy Compliance Agreement - Form
- Telecommuting IT Check List - Form
- Telecommuting Work Agreement - Form
- Text Messaging Sensitive Information Agreement - Form
What’s New

Version 6.1
- Updated all forms to be compliant with mandated security and privacy requirements
- Added electronic forms
  - Application & File Server Inventory
  - BYOD Access and Use Agreement
  - Internet Access Request
  - Internet Use Approval
  - Security Access Application
  - Social Networking Policy Compliance
  - Telecommuting IT Checklist
  - Telecommuting Work Agreement
  - Text Messaging Sensitive Information Agreement

Version 6.0
- Major rewrite of change control and version control as part of ITSM and SOA
- Updated all of the electronic forms
- Added materials for BYOD and mobile computing
- Updated to offering to include frequently update items as electronic forms
- Updated to meet all of the current compliance requirements

Version 5.0
- Added BYOD support
- Re-formatted utilizing CSS style sheet
- Added Electronic Forms
- Blog Compliance Agreement
- BYOD Access and Use Agreement
- Email employee Agreement
- Internet Access Request
- Internet and Electronic Communications
- Internet Use Approval
- Sensitive Information Policy Compliance Agreement
Version 4.1
- Added section on Best Practices for the Help Desk
- Updated formatting
- Corrected minor errata

Version 4.0
- Updated Format to comply with CSS
- Updated Business and IT Impact Questionnaire
- Updated to meet mandated requirements

Version 3.4
- Update Blog and Personal Web Site Policy
  - Updated to meet Sarbanes-Oxley requirements
  - Updated Blog and Personal Web Site Compliance Agreement
  - Added section on Rights to Content
  - Added Best Practices Section

Version 3.3
- Added section on Service Management Standards including ITIL and ISO 20000
- Updated process flow charts

Version 3.2
- Updated section on e-mail, Internet and Electronic Communications
- Updated Blog Policy Acknowledgement Form
- New Forms
  - Internet Usage Policy – Employee Acknowledgement (short form)
  - E-Mail Usage Policy – Employee Acknowledgement (short form)

Version 3.1
- Corrections to errata
- Defined Service-Oriented Architecture
- Added Service Level Agreement Policy Template (application)
Version 3.0

- Sensitive Information Policy
- Sensitive Information Compliance Agreement

Version 2.2

- Blog and Personal Web Site Policy
- Blog Policy Compliance Agreement

Version 2.1

- Internet, E-Mail and Electronic Communication Policy – Added
- Travel and Off-Site Meeting Security – Added
- Forms – Checkboxes automated for double clicks