



Service Desk: IBM's Control Desk Implementation

March, 2015



Agenda:

- Who We Are
- Why Did Sears Replace Service Desk
 - Process Evaluation
 - Managed Service Providers
- Project Overview
- Unique Features
 - Record Locking
 - Paging
 - Change Management
 - Ticket Automation
- Wrap up and Questions



Sears, Who We Are:

Multi-Channel Retailer

- 172 Retail Stores
- 201 Hometown Stores
- 1300 Agents: Catalogue and Online Merchandising pickup locations
- Catalogue Call Centres
- Sears.ca
- Parts & Service
- Sears Travel



Sears IT, Who They Are:

International Development & Support

- Workstations to Mainframes
- Legacy and State Of The Art Applications
- Communications: International to Small Town
- Local Design, Architecture, Hosting
- Managed Services
 - International Development
 - International Support



Service Desk Context

Service Desk Toronto, Montreal, and NOC

- 140,000 Calls
- 45,000 Emails
- Incident, Problem, & Service Request Management
 - 70,000 Tickets in 2014
 - 36,000 Created via automation
 - 34,000 Created manually
- Change Management
 - 2650 Change Records
- Paging
 - Control M Links
 - Page Gate
- Asset Management



Service Desk and ITIL Process Evaluation

- Sears Change & Incident Processes Investment
 - Training
 - Adoption/Acceptance
- Change Management
 - ITIL
 - Sears
- Incident used for every type of issue
 - Metrics



Sears Project Overview

- Replace green screen Mainframe application that is approx 28 years old
- SCCD 7.5.1 Implementation
 - Change Management , Go Live Oct 27, 2014
 - Ticketing (SR, Incident, Problem) Go Live March 3rd
- Integration with distributed monitoring (Omnibus) for automatic ticket creation
- Integration with mainframe & distributed batch for automatic ticket creation
- Improved HELP function and capability (Hover)
- Delivered by a team of
 - 5 Sears staff who had their regular responsibilities in addition to this project.
 - 3 Ontracks resources that managed various components (Infrastructure, Process, Applications, Testing, Training, Process workshops)



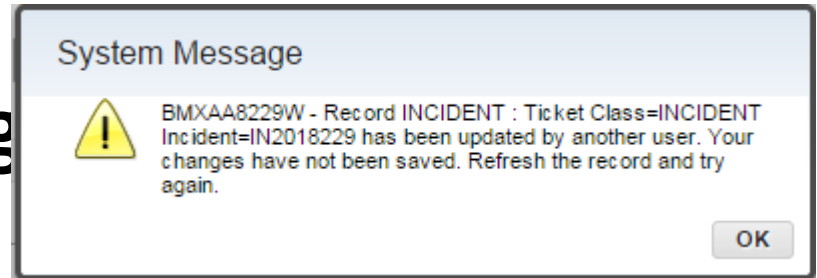
Unique Features

Custom Built Features to Support

- Record Locking
- Paging and Escalation
 - Email or SMS (email to SMS)
 - Manage internal directory of support teams (queues)
- Workflow for Ticket and Change Mgmt
 - Email Interaction for Change Approval (from a smartphone)
 - Approvals at the Task level
 - Defining Change Windows automatically (ie Scheduled Change must have Target Start > 4 days)
- Integration using email Listener for Automatic Ticket Creation from Mainframe



Feature: Record Locking



- Business Case:

“Sears Help Desk and Operations Team can edit tickets in any queue. However, for other Queues only people assigned to that queue can edit tickets”

- SCCD Constraint:

If two users fetch the same record and begin to update at the same time. User 1 saves the record. User 2 attempts to save and gets a system message, “Record Updated by another, please re-fetch”. Upon re-fetch any changes made to the record by user 2 are lost.

- Solution:

- User selects an existing record with status other than “NEW” – Records are presented as Read Only (Conditional UI)
- Verify record is not locked by another user – (*Record Locked?*, *Record Locked by* and *Record Locked Date* fields have been added in ticketing apps)
- Click *Record Lock* Button to place a lock on the record for editing – If record is already locked by another user, then user cannot lock a record. HD and operations can lock the ticket for any queue if its unlocked.



Record Locking: Configurations Required

- 1 Auto Script with 3 Launch Points (SR, Incident Problem)
- 12 Conditions – examples include
 - User has to be part of a Queue or HD or Operations
 - if Status = New, Record locking can't be applied
 - Hide New Row buttons
- Data Restrictions in Security Groups
- Workflow will remove lock when transferring queues
- Escalation to remove lock when User Logs out.



Record Locking, Con't

- Record now shows user has obtained record lock and the ticket is made available to the user that established the lock. *Username* and *Record Locked date* will be displayed on the screen through Automation script.
- All existing business rules are now back in play and the user can *edit, update, run workflow* etc. based on the current business rules for ticket status and security rights.
- When all activities are complete, user can click on the *Record lock button* again to release the lock. *Record locked, Record locked by and Record locked date* data will be released.
- Once user signs out of Control Desk, lock will be released through escalation.



Record Locking / Unlocking

Record Lock / Unlock

To Edit the existing record, Click on above Push Button to lock the record in editing mode. Similarly, Clicking the button again will unlock the record.

Record Locked?

Record Locked Date:

Record Locked By:

Reported By

Source:

UserID Lookup: »

External Vendor/Company Name:

Full Name (Firstname Lastname) »

Phone: Extension: E-mail:

Record Lock / Unlock

To Edit the existing record, Click on above Push Button to lock the record in editing mode. Similarly, Clicking the button again will unlock the record.

Record Locked?

Record Locked Date:

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Reported By

* Source:

* UserID Lookup: »

External Vendor/Company Name:

Full Name (Firstname Lastname) »

* Phone: * Extension: E-mail:



Feature: Paging

- Business Case:

Sears Help Desk and Operations Team need to be paged for Severity 1 & 2 tickets. Need to support Pagers, SMS, email for paging types.

- SCCD Constraint:

SCCD is not a paging system out of the box.

- Solution:

- Escalation checks every 2 seconds for a ticket with a Severity of 1 or 2.
- Add Pager check box on Ticket applications to Activate Page (Manual) or acknowledge page was received.
- Communication Templates used to define recipients of page.
- Person records have SMS field populated with cell # or pager # as an email address (ie 555-555-5555@txt.bell.ca)



Feature: Paging Con't

People Filter > 1 - 4 of 4

Person	Name	Group Type	Member Type	Use for Organization	Use for Site	Group Default?	Site Default?
<input type="text"/>	<input type="text"/>	<input type="text" value="paging"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
▶ UNIX_PG	<input type="text"/>	PAGING	PRIMARYPAG	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ GBROW22_P	<input type="text"/>	PAGING	ESC2	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ AMOGHAD_F	<input type="text"/>	PAGING	ESC3	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ NOC_PG	<input type="text"/>	PAGING	ESC4	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

* Source:

Page Manager On Call?

Paging Activated? ⓘ Paging will be activated once Severity 1 or 2 is chosen, and Ticket is transferred to Queue

Send Manual Page?

Automation Ticket Info

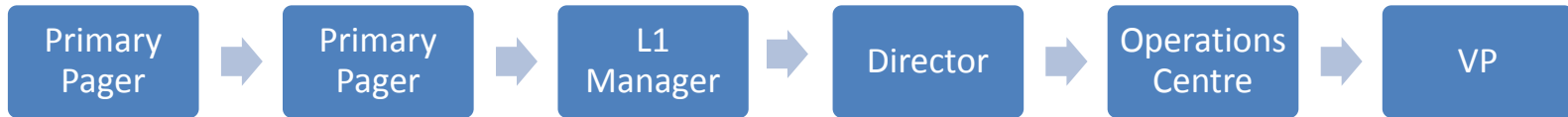
Work Log | Communication Log | WF Memos

Communication Logs Filter > 1 - 2 of 2

Originating application	ID	Is Global Issue?	Created By	To	Date	Subject
▶ WFPROCESS	INCMAIN	<input type="checkbox"/>	AHACHIL	torops@sears.ca, 4163790242@pager.bellmobility.ca	03/06/2015 18:37:41	IN2003792 - REGISTERDEAL - site down
▶ ESCALATION	PAGEMGRONCALL	<input type="checkbox"/>	MAXADMIN	WRIGHT1@sears.ca, Kevin.Campeau@sears.ca, Darryl.Wood@sears.ca, 4168095118@txt.bell.ca, 4169986255@txt.bell.ca, 4165768449@txt.bell.ca	03/06/2015 18:38:56	FYI: IN2003792 - 7577 - Sears Trail Hometown Store - site down



Feature Paging: Configurations Required



2 Escalations (1 Manual Page, 1 Automated Paging)

5 Communication Templates

Each Template has a different recipients in the TO: field.

Recipients are based on escalation points from Escalation (Tech, Lead, Manager, Director, SVP)

Modify System Property `mxe.content.type = text/html` to handle conversion of email to SMS.

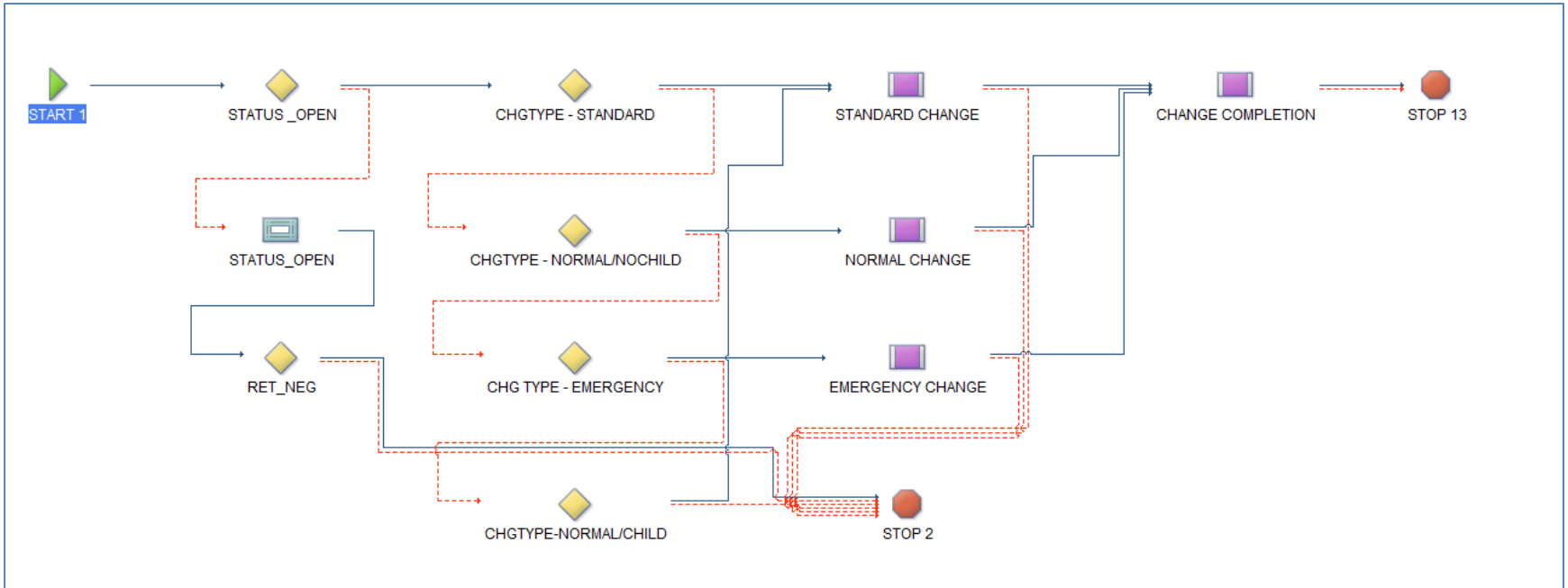
Not all telecom carriers handle the conversion of email to text the same

Person Groups have two new fields Group Type and Member Type.

Group Type = Paging

Member Type = Primary Pager, ESC1...ESC5

Change Management





Change Management Con't

Changes

Find: [Search Icon] [Refresh Icon] [Print Icon] [Export Icon] [Import Icon] [Home Icon] [Back Icon] [Forward Icon] [Close Icon]

Change: Business Communication | Tasks / Related | Log | Completion

C1000840 Disk Space Warning (80%) Full for /opt/IBM/ITM on r5982pcr1

Creator: ANLYSTCD Analyst | Change Category Details: Uniform | Planned Start: 02/26/2015 10:15:00 | Successful?
Queue: SUNLINUX | Related Ticket ID: IN200534 | Planned Finish: 02/27/2015 11:30:00

Waiting on Approval | L1 Manager Approved | Approved | Backed Out | Canceled | Completed | Closed

Current Work Items

- Standard C1000840 - Disk Space Warning (80%) Full for /opt/IBM/ITM on r5982pcr1 - Implement change

Creator Information

User ID: ANLYSTCD | Phone: 54458648 | Queue (Creator): SUNLINUX
Creator: ANLYSTCD Analyst | Created Date: 02/19/2015 09:37:35 | Queue Category: INFRAOPS

Change Details

Change: C1000840 | Status: JOPR | Business Impact: Low
Summary: Disk Space Warning (80%) Full for /opt/IBM/ITM on r5982pcr1 | Change Category: Uniform | Risk Assessment: Low
Purpose of Change: add hd space to r5982pcr16 | Change Type: Standard | Tipare (File Integrity Monitoring): No
Location Affected: 5982 STEELERS TECH SUPPORT CENTRE | Component: IC - IT Change | ChangeMn Package #:
Additional Locations:
Details: Disk Space Warning (80%) Full for /opt/IBM/ITM on r5982pcr15
Will be adding space to this volume to ensure adequate space in the future.

Change is a parent record?
Change is a child record?

Schedule Dates

Earliest Start: 02/23/2015 09:37:35 | Planned Start: 02/26/2015 10:15:00 | Install Time (HH:MM): 25:15
Planned Finish: 02/27/2015 11:30:00

Lines of Business Impacted

Please select at least one Line of Business impacted. If none from the list is applicable, specify in the Other LOB(s) Impacted field

All LOBs?	Catalogue?	Corporate Stores?	Finance?	HR?	IT?	Logistics?	Merchandising?	Other LOB(s) Impacted:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Card Services?	Corporate Contact Centres?	E-Commerce?	Home Services?	Hometown / Dealer Stores?	Legal / Corp Communications?	Marketing?	SLH?	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

User Experience

DR (Disaster Recovery) / Update Required?: No
Testing Results: Tested
User Experience Affected?: No
What will be different about the user experience as a result of this Change?:

Quality Assurance

QA Required?
Attachments:
Please save the entire record before adding attachments

Planned Impact During Implementation:
Outage Duration (HH:MM):
Impact(s) if unsuccessful:

Back Out Planning

Back Out Plan Description: Remove added space
Back Out Duration (HH:MM):
Back Out Secondary Resource Name:
Back Out Secondary Resource Pager:



Change Management, Con't

Changes

Find:

List View Change **Business Communication** Tasks / Related Log Completion

Business Communication

What is the change?:
Disk Space Warning (80% Full) for /opt/IBM/ITM on r5982pcr

Purpose of Change:
add hd space to r5982pcr16

User Experience Affected?:
no

What Business Operations/Locations will be impacted?:

What Applications will be impacted?:

What will be different about the user experience as a result of this change?:

What is the communication plan?:

When are we planning on making this change?
Planned Start: 02/26/2015 10:15:00
Planned Finish: 02/27/2015 11:30:00

What will be the outage and/or impacts during the implementation?:

Outage Duration (HH:MM):

What are some of the potential impacts if the change does not work as anticipated?:

Back Out Planning

Back Out Plan Description:
remove added space

Back Out Duration (HH:MM): 1:00

Back Out Decision Maker Name:
me

Back Out Decision Maker Email:
56568596356

Back Out Primary Resource Name:
...

Back Out Primary Resource Email:
...

List View Change Business Communication **Tasks / Related** Log Completion

Children of Change C1001577 [Filter](#) > 0 - 0 of 0

Change	Summary	Priority	Status
...No rows to display...			

Tasks for Change C1001577 [Filter](#) > 1 - 3 of 3

Optionally create tasks in this table to define the implementation plan

Sequence	Task	Summary	Status	Owner Group	Planned Start	Planned Finish
▶	10	Configure new public IP address	WAPPR	NETWORK_C	03/17/2015 10:00:00	03/17/2015 12:00:00
▶	20	Perform test for SPOC	WAPPR	SPOC_C	03/17/2015 13:00:00	03/18/2015 17:00:00
▶	30	Perform test for Credit	WAPPR	CR_C	03/17/2015 13:00:00	03/18/2015 17:00:00

Related Tickets [Filter](#) > 0 - 0 of 0

Related Record Key	Description	Class	Status	Relationship
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Feature: Ticket Automation

- Business Case:

Tickets need to be generated automatically through various Event Management systems (Control-O, Control-M, Control-M Links, IBM Tivoli Monitoring, Netcool Omnibus, WPOSTMSG. High volume of tickets (60-70% of the tickets that will be created in SCCD will be Automated)

eg. First 4 days of going live 1577 Incident Tickets were created of which 937 through automation.

- Solution:

- Email Listener used for Control-O (Mainframe events)
- Netcool Omnibus used for Control-M Links, ITM, Omnibus, WPOSTMSG). Leveraging pre-existing Netcool TSRM Gateway for intergation



Feature: Ticket Automation Con't

- E-Mail Listener receives formatted emails (Attribute Value Pair)

```
#MAXIMO_EMAIL_BEGIN
LSNRACTION=CREATE
.
.
LSNRAPPLIESTO=INCIDENT
.
CLASS=INCIDENT
.
TICKETID=&AUTOKEY&
.
REPORTEDBY=IMFMON
.
REPORTDATE=01/015/2014:16:32
.
DESCRIPTION=THIS IS A TEST FROM DCTT
.
DESCRIPTION_LONGDESCRIPTION=THIS IS AN SCCD TEST TICKET FROM DCTT
.
JOBNAME=MIKE
.
JES=123
.
ABENDCODE=JCLERR
.
EXTERNALSYSTEM=CONTROLO
.
CLASSIFICATIONID=ACNS
.
COMMODITYGROUP=IBMMAINF
.
COMMODITY=IMFMON
.
#MAXIMO_EMAIL_END
```



Next Steps \ Roadmap

- IT Asset Management
 - Audit exposures
 - PCI Compliance
- Link Assets to Tickets and Change Records



Questions?

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