General ITIL Overview

This page describes a few key features of our ITIL system.

Which ITIL Standard do we Use?

Our ITIL out-of-the-box system is based on the standards and terminology defined in the ITIL 2011 Edition library.

Control Active Functions with the ITIL Functions Table

A full-fledged ITIL system includes many complex relationships and handling of the individual components that may be included in an ITIL framework. So our out-of-the-box system has many features that not all companies will want to use, such as Operational Level Agreements, Definitive Media Libraries, Underpinning Agreements, a Continual Service Improvement register, configuration item baselines, release management, event management, and so on.

To make it easy to hide or turn off certain features, we have added a table called **ITIL Functions** in the system. This table describes several functional areas in the system and provides an option to turn them on or off. Additionally, it stores notes about additional steps required to hide all the function's related tables and fields, and note for reactivating a disabled function.

If the Function Turned On value is No, then the fields related to that function are mostly hidden from users, while the rules that may run for that function will not meet the condition necessary for them to run. By default, most of the functions are on, with a few exceptions. You may however want to start with just a few functions on, and then add others once you have had some experience with the core functionality. For more details, view the ITIL Functions section.

Keep in mind that fields that are visibility controlled by the ITIL functions value will only be shown to a user if that user's group has view access to the relevant "ITIL Function turned on" field in that table.

Time Based Rules Need to be Enabled

The system comes with over 100 preconfigured time based rules that can run on any frequency, from every 5 minutes to every 10 years. These rules identify service requests or incidents that have gone past their SLA due dates, tasks that are coming due, and much more.

ⓘ

> ⓘ Since there are many parts of the system that a given customer may not use, we have disabled all these time based rules by default. As you configure each module of the program to go live, you will need to enable the rules that you want to use.

You can easily enable rules by navigating to **Setup [Table]** and then visiting the Rules tab. For instance, suppose you want to turn on time based rules for Business Services. Under the Business Services table:

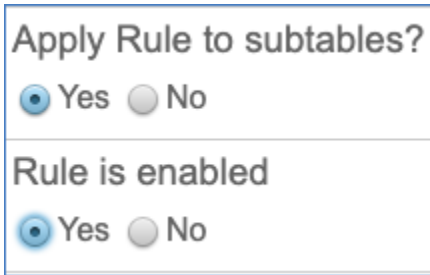1. Click Setup Business Services.
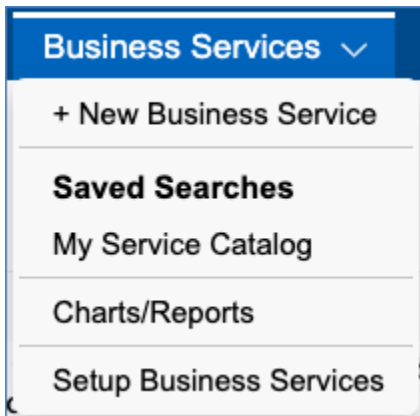
Setup [Business Services]

2. Navigate to the Rules tab. Sort the Rules by the Comment field to find the time-based rules that have a z in front of their name. This indicates that they have been disabled. Select each rule you want to start running and then click Enable.
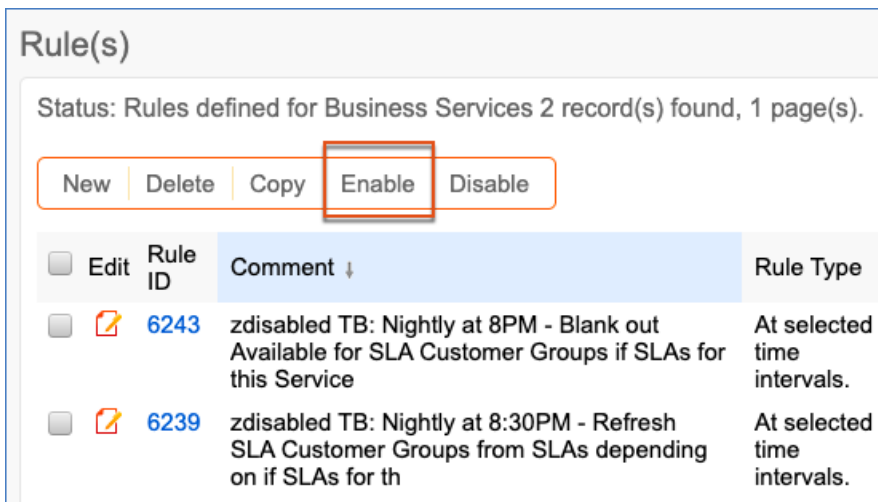
Enable button of the Rules tab

3. Edit each rule that you enabled. Change the name of the rule to remove the "zdisabled" text.

You can also enable a rule by editing it, scrolling down to the "Rule is enabled" option, and selecting Yes.

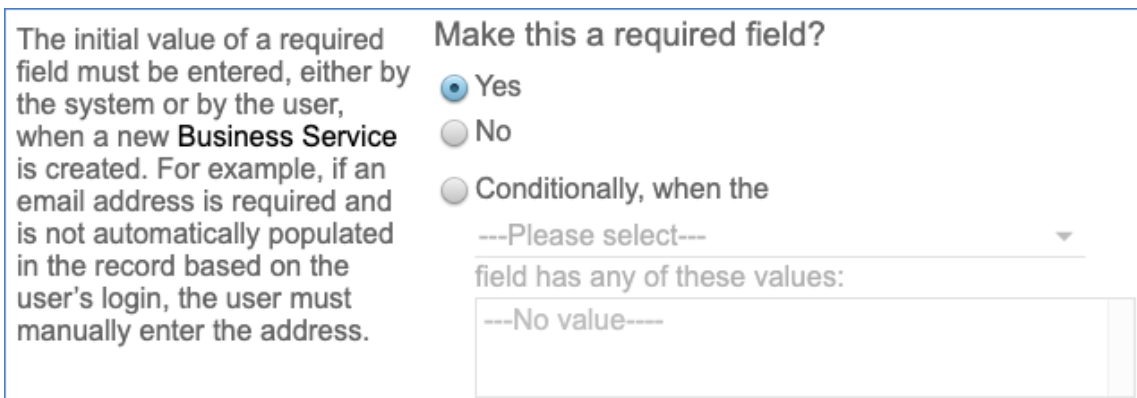Apply Rule to subtables?
⦿ Yes ◯ No

Rule is enabled
⦿ Yes ◯ No

Rule is enabled option available by editing the rule

Security Controls

In general, group permissions control what each user can see and do in the system. A user may belong to more than one group to receive a superset of that group's permissions. For detailed documentation of our group permissions and how they work, click Group Permissions Help.

Designating Fields as Mandatory

Any field can be made mandatory. It can be defined as always required, never required, or conditionally required based on the value in another choice-based field. This option appears within the field setup wizard, on the Options tab.

The initial value of a required field must be entered, either by the system or by the user, when a new **Business Service** is created. For example, if an email address is required and is not automatically populated in the record based on the user's login, the user must manually enter the address.

Make this a required field?

⦿ Yes
◯ No

◯ Conditionally, when the
---Please select---   ▾
field has any of these values:
---No value----

Once fields have been designated as required, how this requirement is displayed is defined globally.

The Required Fields window, located at the **Setup** gear icon **> Look and Feel > Required Fields Display**, is a single page that allows you to define how the system displays required fields.
The options selected in the Required Fields window apply to all users, and can be defined separately for User-record fields and for Wizard fields.

Here you can choose:

- Whether to use an asterisk (*) to denote a required field
- Where to position the asterisk
- To use alternate text defined by the administrator with custom HTML
- The color of the required label

Archiving Records

Records may be archived automatically in a variety of ways. The system can run a time based rule to set a flag in records whose Date Closed is greater than some time period, for instance 5 years, and that are not used as standard solutions or knowledgebase articles. It can set an Archived flag to Yes, and that can cause the records to be made invisible to standard users and then deleted on a regular basis, say quarterly or annually, after saving a backup with all archived records.

In our out-of-the-box setup, we have added an Archived field for Incidents with a rule to set the value to Yes three years after an incident is closed, provided it is not a standard solution or converted to a knowledgebase article.

Unique Record IDs

In Agiloft, any record is automatically assigned an ID number that is unique in the table in which it resides. The numbers are incremented by 1 for each record. If a customer requires a more complex numbering system, we can customize the system to add prefixes or other values in addition to the automatically incrementing number.

Audit Trails and the History Field

Each table has a History field that maintains an audit trail of every change made to the record, whether that change is made by a user or a rule action.

Examples of entries in the History tab of a random record

You can open any entry for complete change details.

The history shows whether changes were made by a user or a rule, and also provides a button, View Resource After Change, to show a snapshot of the state of the record after this change.

View resource after change button

Searching

Any table in the system can be searched. For instance, you may want to find a particular incident, or all contracts of a certain type, or you may be looking for particular text content within an attached file. The quick search block lets you complete *ad hoc* searches, and is used when you don't anticipate running the same search again.

Saved searches let you run the same search repeatedly and are typically used for searches you will need routinely. Saved searches have the added benefit of accepting more complex search criteria and offer more granular search results.
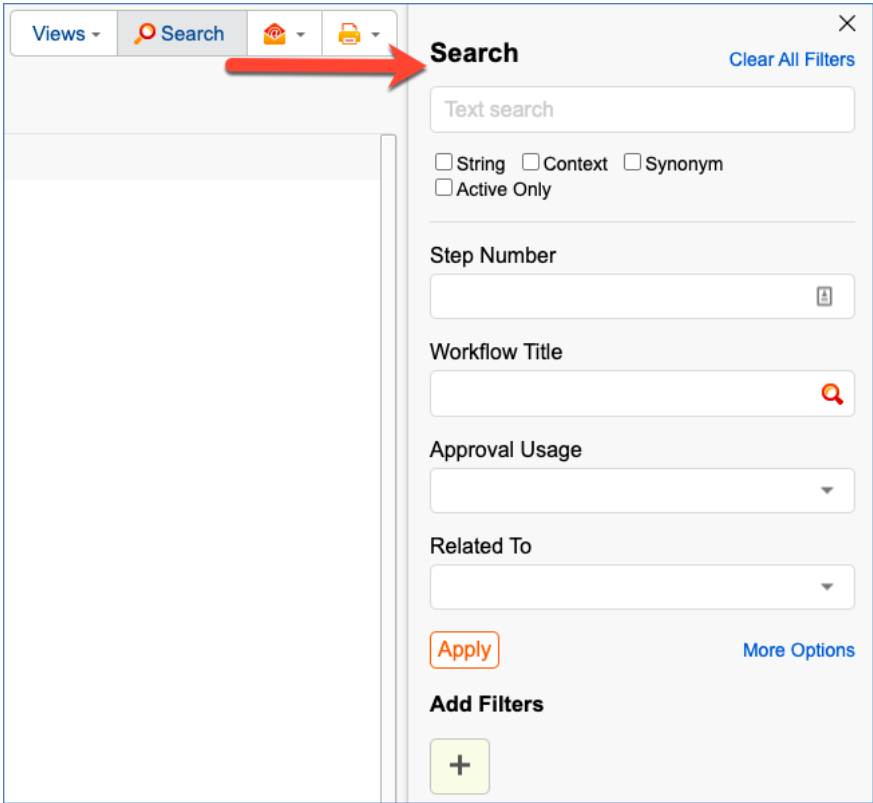
Quick Searches

You can perform searches in two different ways. The first way is to use the search bar at the top of the main window. This allows you to search for general text throughout the entire system or in an individual table of your choice. You can select where you'd like the search to apply using the drop-down list to the right of the search input bar.

Search bar example with All tables selected

You can also use the more robust Quick Search feature to filter your searches using more than just text, although there is a more robust text search feature available in Quick Search. The Quick Search feature appears on the far right-hand side of the window after you click Search from the action bar. You can use the text search feature at the top of the pane to search by String, Context, or Synonyms. You can also click Active Only to ensure only active records are included in the search results.

Quick Search pane is opened by the Search button on the action bar

While the Text search options remain constant, the other options on the Search pane are determined by the columns in the Default table view. For example, the options available in the Search pane above correlate to the columns in the Default view of the Approval Templates table.

Default view columns

You can also filter your searches using specific Fields. Under Add Filters, click the + icon. You can then add filters that will find records that contain fields with values that match the parameters you input.

Add Filters feature of the Quick Search pane

Saved Searches

To create a saved search:

1. Access the table you'd like to create the search in.
2. Click the Search Name underneath the table name. The default search name is usually stylized like "All [Table Name]" or something similar.

Search Name example

3. From the drop-down list that appears, click New. This opens the saved search wizard, which has options for Simple filters (most commonly used), as well as more advanced options.
4. Click Simple to add a filter.

List of Filters available when creating a saved search

Similar to the quick search above, simple filters let you search any field for a particular value. Selecting -TEXT- will search through all available fields within the current table. For more information on the other search types, please see Saved Searches or the online training unit for searching.

Managing Saved Searches

Users in the Admin group, and those with permission to publish saved searches, have access to an Apply tab in the saved search wizard where they can decide which groups should have the search:

- Accessible
- Active
- Visible in top nav bar
- Visible in My Assigned

The Apply tab options have the following results:

- Choosing to make a search Accessible gives user the ability to interact with the search in their own Manage Searches wizard.

Each power user can adjust where accessible searches appear by checking the Active, Show in Left Pane, or Show in My Assigned boxes. This lets users customize where searches appear to tailor the interface to their work preferences.

- Active makes the search appear on the Search drop-down.
- Show in Left Pane adds the search to the left pane, indented below the Table name.
- Show in My Assigned adds the search to the My Assigned section in the left pane.

Additional Searching in the EUI

In the End User Interface home page, there is a search block that can be used to search tables to which the user has access. A general internal customer can search Service Requests, Incidents, Articles, or can use an integrated search from Google.

End User Interface search section