

## UNM Service Desk Standard

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**IT Standard Issued:** Draft of April 20, 2016

**Effective Date:**

**Responsible Executive:** UNM Chief Information Officer (CIO)

**Responsible Office:** UNM CIO

**Contact:** IT Director, Customer Support Services

### Purpose of the Service Desk Standard

The purpose of the Service Desk Standard is to define minimum acceptable mechanisms for providing technical support and request fulfillment for information technology (IT) services at UNM. The standard identifies a consistent and reliable user interface for students, faculty, staff and administrators who use technologies provided by various providers across the institution.

### What is Service Desk?

The role of the Service Desk in an organization is to:

- Serve as the designated operational single-point-of-contact (SPOC) for end users and IT staff
- Execute the Incident Management and Request Fulfillment processes
- Communicate with users in terms of providing information, advice, and guidance
- Offer one or several of the following types of support: telephone support, onsite support, electronic support, or self-service support.

#### **Example of a Service Desk** at UNM

- UNM Information Technologies Department (UNM IT) at <http://help.unm.edu> or by calling (505) 277-5757. This Service Desk supports enterprise systems across UNM.

### Who is affected by the Service Desk Standard?

This Service Desk standard applies to any UNM organizational entity (i.e. branch, division, college, school, department, business unit, or other UNM affiliated organization), hereinafter referred to as a “department”, that intends to implement, or has implemented a Service Desk function. All departments that provide infrastructure and support for technology end-users need to adhere to the standard.

Departments that have existing Service Desk infrastructure or services are not required to adopt any specific technology system. At time of implementation or refreshing Service Desk equipment or adding staff, departments are advised to consider the following:

- 1) Costs (one-time and reoccurring) total cost of ownership, costs per user
- 2) Support and Training – technical and instructor
- 3) Scalability to satisfy the requirements of the most users
- 4) Functionality – capabilities and limits of the network, hardware and software

### Scope of the Service Desk Standard

The standard addresses Supplemental Services identified by the IT Strategic Advisory Committee:

- Service Desk – non-core systems

The standard addresses support via any type of service point for all technology services used in various UNM settings for instruction, learning, administration, and research.

**Excluded from the scope of this standard:** Other non-technical UNM Contact Centers that serve to provide updates, schedule appointments and answer general questions.

## Responsibilities

- **Office of CIO:** Ensure currency, correctness and appropriate periodic review of the standard by facilitating review and update of the standard as needed.
- **IT provider departments:** Comply with the Service Desk specifications below to support those services and products.

## Process for Review of the Standard

The process to update the standard is defined and described on the Standards page of the CIO website at <http://cio.unm.edu/standards/standards-development.html>:

- Requests for review and update of the standard can be submitted to the Office of the CIO who facilitates the update. The CIO may independently, or upon request of the administration, also determine if review and update is appropriate for the standard.

## Compliance

- This standard has been developed under and is subject to all UNM policies, some of which are cited in the References.
- The UNM Administration, Internal Audit, or UNM IT may determine the compliance or maturity level of departmental support approaches with this standard.

## Service Desk Standard Specifications

The following standard contains content from the Help Desk Institute (HDI) Support Center Standard. HDI® is a registered trademark of UBM LLC in the United States and other countries, and no part of this publication may be reproduced without the consent of HDI and UNM Information Technologies.

The following standard is organized into four categories. Each category contains a set of activities, each with four levels of maturity. UNM does not require full maturity for each activity; the minimum level required is designated with the word “Minimum” in the first column of each activity (categories 1.0-3.0) or category (category 4.0).

### Service Desk Standard Categories and Activities:

#### Measuring Maturity in Categories 1.0 through 3.0:

The maturity levels for activities in each of the Enablers categories are customized to address each activity, but can be generally described as:

Level 1	<b>Just Started</b> — Recognition of the value of the activity and the beginnings of plans for improvement.
Level 2	<b>Some Progress</b> — Evidence that the activity is being performed and is reviewed for improvement, and there are some examples of successful implementation or results.
Level 3	<b>Considerable Progress</b> — Evidence that the activity is being consistently performed and is regularly reviewed. There are examples of improvements although implementation may not be universal or applied to its full potential across the organization.
Level 4	<b>Fully Achieved/Optimized</b> — An approach or result that is universally implemented, continual improvement efforts exist, and it is difficult to envision significant improvement.

**Category 1.0 Organizational Integration:**

Organizational Integration ensures that the work being done is aligned with the needs of the organization and the value of the work being done is communicated and understood throughout the entire organization. Subcategories of Organizational Integration are:

1.010	<b>Alignment to Organization:</b> Service Desk management promotes an understanding of the relationship of Service Desk services to the core functions, processes, and activities of the organization.	
Minimum	Level 1	Service Desk management can describe at least three of the most important factors for the organization's success.
Recommended	Level 2	Service Desk management understands, and can articulate, the functions, processes, and activities that are critical to the organization's success.
Preferred	Level 3	Service Desk staff understands, and can articulate, how failures in supported services impact the organization.
Optimal	Level 4	Service Desk management adjusts services in response to changes in organization and/or customer requirements.

1.020	<b>Integration within Support Model:</b> Service Desk management develops and promotes an understanding of the Service Desk's relationship within the support model (i.e., all internal and, if applicable, external resources that provide support).	
Minimum	Level 1	Service Desk management displays a clear understanding of how the Service Desk interacts with other groups in the support model.
Recommended	Level 2	Service Desk staff can articulate a clear understanding of the needs of other groups in the support model.
Preferred	Level 3	Service Desk management and staff actively communicate with management and staff of other groups in the support model.
Optimal	Level 4	To fully anticipate and support planned changes, a Service Desk representative is actively engaged in release and control processes.

1.030	<b>Resource Allocation and Alignment:</b> Service Desk management effectively establishes the optimal allocation and alignment of resources (i.e., people, processes, and technology).	
Minimum	Level 1	A methodology is in place to determine the type and amount of people, processes, and technology resources needed to provide Service Desk services.
Recommended	Level 2	The methodology takes into account the achievement of established service level targets and operational goals.
Preferred	Level 3	The resource allocation is regularly revised to accommodate changes in organization and/or customer requirements.
Optimal	Level 4	Resource requirements and allocations are aligned to defined service level targets that directly support established goals and objectives.

1.040	<b>Distribution and Communication of Information:</b> Service Desk management actively promotes and facilitates the distribution and communication of Service Desk performance information both within the Service Desk and throughout the organization and to other support groups.	
Minimum	Level 1	Service Desk operational performance results are distributed and communicated to Service Desk staff at least monthly.
Recommended	Level 2	Service Desk operational performance results are distributed and communicated to other support groups and customers at least quarterly.
Preferred	Level 3	The Service Desk's progress toward achieving tactical objectives is tracked and communicated to Service Desk staff and other support groups at least quarterly.
Optimal	Level 4	The Service Desk's progress toward achieving strategic goals is tracked and communicated to Service Desk staff, other support groups, and customers at least twice annually.

## Category 2.0: Resources

The Service Desk must have access to the resources (i.e., people, processes, and technology) necessary to achieve its goals and objectives. These include financial and human resources, physical facilities, technology (i.e., specialized systems and tools supported by a reliable infrastructure), specialized organizational knowledge, and/or third party partnerships. Service Desk-specific systems and supporting processes can provide significant improvements in automation that increase the Service Desk's efficiency, effectiveness, and productivity, which can improve the quality and consistency of Service Desk services. Integration of support-center-specific systems with other systems used in the department and/or organization enhances these improvements even further. The resulting benefits to the organization include higher productivity, cost savings, and opportunities for revenue enhancements.

2.010	<b>Incoming Communications Distribution System:</b> Distribution of incoming communications from all channels in a timely manner is important to ensure that service level targets can be met and impact to the organization is minimized.	
Minimum	Level 1	A system and/or process is in place to distribute incoming communications from all channels in accordance with the relevant procedures.
Recommended	Level 2	The distribution system(s) provides automated routing capabilities, and a means to display the volume of incoming communications and response times to the Service Desk management and staff.
Preferred	Level 3	The distribution system(s) is configured to provide alerts to the Service Desk management and staff in advance of missing a service level target.
Optimal	Level 4	The distribution system(s) are integrated with the service management system.

2.020	<b>Investigation and Diagnosis Resources:</b> The Service Desk staff has access to hardware, software, and/or other technology for supported services to maximize troubleshooting capabilities.	
Minimum	Level 1	Service Desk staff has access to current documentation for all supported services.
Recommended	Level 2	Service Desk staff has access to common customer system(s) and can attempt to replicate incidents during investigation and diagnosis.
Preferred	Level 3	Common customer systems are accessible from the Service Desk staff workstations during investigation and diagnosis.
Optimal	Level 4	A lab facility (or equivalent) is available to Service Desk staff where systems, configurations, and/or tools for less commonly used supported services can be accessed and used during investigation and diagnosis.

2.030	<b>Service Management Tool/System:</b> A service management tool/system is implemented to track and facilitate the handling of all incidents/service requests for supported services.	
Minimum	Level 1	An automated service management tool/system is implemented in the Service Desk that provides the capability to track incidents/service requests through closure.
Recommended	Level 2	All primary support groups in the support organization use the same service management tool/system (i.e., shared data) to track and update incidents/service requests.
Preferred	Level 3	Users have access to an interface for the service management system to submit new incidents/service requests and update open incidents/service requests previously submitted with additional information (e.g., provide supplemental data, identify change in impact and/or urgency).
Optimal	Level 4	The service management system is configured to proactively notify customers and/or users of changes in status of incidents/service requests, and to notify designated Service Desk management representatives prior to a service level target being missed.

2.040	<b>Knowledge Management Tool/System:</b> Knowledge management tool(s) and/or systems are used to capture, structure, and share knowledge to provide answers to common customer	
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		questions, search for solutions to known errors, and improve the quality of service delivery to customers.
Minimum	Level 1	A searchable repository is in place to capture and store knowledge.
Recommended	Level 2	The knowledge management tool/system includes the capability to flag or provide feedback on knowledge content.
Preferred	Level 3	The knowledge management tool/system and service management tool/system are integrated to optimize incident resolution and request fulfillment.
Optimal	Level 4	The knowledge management tool/system is integrated with the service management system and self-service is enabled.

2.050		<b>Knowledge Resources:</b> Knowledge is captured as an asset of the Service Desk for reuse in the incident, request, access, and event management processes.
Minimum	Level 1	Knowledge content is used by Service Desk staff.
Recommended	Level 2	Knowledge content is contributed by Service Desk staff.
Preferred	Level 3	Knowledge content is owned by Service Desk staff.
Optimal	Level 4	Ownership of knowledge content is shared among Service Desk staff and primary support groups.

2.060		<b>Reporting Tool/System:</b> Reporting tool(s) and systems must be in place to compile data from various Service Desk tool(s) and systems into performance results reports that can be used by Service Desk management. This is crucial to optimizing quality and performance.
Minimum	Level 1	Reporting tool(s) and/or system(s) are in place to compile data from Service Desk tool(s) and systems into Service Desk performance results reports.
Recommended	Level 2	Reporting tool(s) and/or system(s) incorporate service level targets and produce reports displaying actual performance compared to the desired service level target for the majority of performance indicators reported.
Preferred	Level 3	Reporting tool(s) and/or system(s) monitor and report performance results in real time, and highlight opportunities for performance and quality improvement.
Optimal	Level 4	Reporting tool(s) and/or system(s) are integrated with the Service Desk systems that provide performance data (e.g., incoming communications distribution system, service management system, knowledge management system).

### Category 3.0: Process and Procedure

Processes and procedures must be in place to enable the Service Desk to achieve its goals and objectives. Processes and procedures critical to the Service Desk's operation must be clearly identified, and the role of the Service Desk and the responsibilities of its management and staff must be clearly defined, documented, and communicated to relevant stakeholders.

3.010		<b>Customer/User Satisfaction Management:</b> A process is in place to measure and manage customer and user satisfaction using a variety of methods. Service Desk management compares and uses the information gathered for continual improvement of support services.
Minimum	Level 1	At least one method is routinely used to collect customer and/or user satisfaction data.
Recommended	Level 2	Procedures are defined and consistently followed for responding to results that do not meet a defined minimum satisfaction level.
Preferred	Level 3	Results are compared to service level targets and the performance trends are routinely communicated to Service Desk staff, primary support groups, and customers.
Optimal	Level 4	A comprehensive satisfaction program is in place that includes multiple methods to assess customer and user satisfaction (e.g., periodic [relationship] surveys, ongoing

		[transactional] surveys, customer forums, feedback to the Service Desk), and the results are used for continual improvement of Service Desk services.
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3.020	<b>Feedback Management:</b> Feedback management – the capture and management of feedback (i.e., compliments, complaints, and/or suggestions) to the Service Desk from its customers, internal support groups, and external support groups – is critical to the continual improvement of the Service Desk operations.	
Minimum	Level 1	Procedures are in place to capture feedback to the Service Desk from customers, internal support groups, and external support groups.
Recommended	Level 2	Actions taken in response to captured feedback are documented.
Preferred	Level 3	There is a documented feedback management process that is routinely followed.
Optimal	Level 4	The feedback management process is reviewed for continual improvement.

3.030	<b>Service Request Fulfillment:</b> Documented procedures for the fulfillment of service requests that are the responsibility of the Service Desk are in place, consistently followed, and maintained.	
Minimum	Level 1	There are documented procedures for the fulfillment of service requests.
Recommended	Level 2	The procedures for the fulfillment of service requests that are the responsibility of the Service Desk include notifying customers when the fulfillment is completed.
Preferred	Level 3	The procedures for the fulfillment of service requests are consistently followed and maintained.
Optimal	Level 4	The procedures for the fulfillment of service requests are regularly reviewed for continual improvement.

3.040	<b>Incident Management:</b> Incident management – managing the response to interruptions in service with a focus on restoring service as quickly as possible and minimizing the impact to the organization – is vital to supporting the organization’s need to maximize productivity. The Service Desk’s role and responsibilities within incident management must be defined, documented, and communicated.	
Minimum	Level 1	There is a documented incident management process that defines the process owner, manager, and practitioners.
Recommended	Level 2	The incident management process clearly defines the role and responsibilities of the Service Desk management and staff within the process.
Preferred	Level 3	The incident management process is consistently followed by the Service Desk and primary support groups.
Optimal	Level 4	The Service Desk is involved in regularly reviewing the incident management process for continual improvement.

3.045	<b>Logging of Incidents/Service Requests:</b> Procedures for logging incidents/service requests are documented, consistently followed, and maintained.	
Minimum	Level 1	There are documented procedures in place for logging incidents/service requests.
Recommended	Level 2	All activities performed by the Service Desk are recorded according to the documented procedures prior to escalating or resolving incidents/service requests.
Preferred	Level 3	The procedures for logging incidents/service requests are consistently followed by the Service Desk.
Optimal	Level 4	The procedures for logging incidents/service requests are regularly reviewed for continual improvement.

3.050	<b>Categorization of Incidents/Service Requests:</b> Procedures for the categorization of incidents/service requests are documented, consistently followed, and maintained.	
Minimum	Level 1	There are documented procedures in place for the categorization of incidents/service requests.

Recommended	Level 2	The categorization of incidents/service requests is assigned based on the customer's description of the affected/requested service.
Preferred	Level 3	The procedures for the categorization of incidents/service requests are consistently followed by the Service Desk.
Optimal	Level 4	The procedures for the categorization of incidents/service requests are regularly reviewed for continual improvement.

3.060	<b>Prioritization of Incidents/Service Requests:</b> Documented procedures for prioritizing incidents/service requests are in place, consistently followed, and maintained.	
Minimum	Level 1	There is a documented prioritization level scheme for incidents/service requests that is based on business impact and urgency.
Recommended	Level 2	There are documented procedures for assigning and changing the priority levels of incidents/service requests.
Preferred	Level 3	The procedures for assigning and changing the priority of incidents/service requests are consistently followed by the Service Desk.
Optimal	Level 4	The procedures for assigning and changing the priority of incidents/service requests are regularly reviewed for continual improvement.

3.070	<b>Status Levels of Incidents/Service Requests:</b> Documented definitions exist for incident/service request status levels and procedures are in place for keeping customers informed of changes in status.	
Minimum	Level 1	There are documented definitions for incident/service request status levels.
Recommended	Level 2	The status level of each incident/service request is updated in a timely manner throughout the incident/service request lifecycle.
Preferred	Level 3	Changes in incident/service request status are communicated in a timely manner to the customer regardless of ownership.
Optimal	Level 4	The procedures for updating, changing, and communicating incident/service request status levels are regularly reviewed for continual improvement.

3.075	<b>Initial Investigation and Diagnosis of Incidents/Service Requests:</b> Procedures for the initial investigation and diagnosis of incidents are documented, consistently followed, and maintained.	
Minimum	Level 1	There are documented procedures in place for the initial investigation and diagnosis of incidents.
Recommended	Level 2	All investigation and diagnosis activities performed by the Service Desk are recorded according to the documented procedures prior to escalating or resolving incidents.
Preferred	Level 3	The procedures for the initial investigation and diagnosis of incidents are consistently followed by the Service Desk.
Optimal	Level 4	The procedures for the initial investigation and diagnosis of incidents are regularly reviewed for continual improvement.

3.080	<b>Escalation of Incidents/Service Requests:</b> Documented procedures for the escalation of incidents/service requests, both within and outside of the Service Desk, are in place, consistently followed, and maintained.	
Minimum	Level 1	There are documented procedures for the escalation of incidents/service requests.
Recommended	Level 2	The procedures for the escalation of incidents/service requests clearly define the parameters for both functional and hierarchical escalation, and the ownership of escalated incidents/service requests throughout their lifecycle.
Preferred	Level 3	The procedures for the escalation of incidents/service requests are consistently followed by the Service Desk.
Optimal	Level 4	The procedures for the escalation of incidents/service requests are regularly reviewed for continual improvement.

3.090	<b>Resolution of Incidents:</b> Documented procedures for the resolution of incidents are in place, consistently followed, and maintained.	
Minimum	Level 1	There are documented procedures for the resolution of incidents.
Recommended	Level 2	The procedures for the resolution of incidents include notifying customers when the Service Desk believes incidents are resolved.
Preferred	Level 3	The procedures for the resolution of incidents are consistently followed by the Service Desk.
Optimal	Level 4	The procedures for the resolution of incidents are regularly reviewed for continual improvement.

3.100	<b>Closure of Incidents:</b> Documented procedures for the closure of incidents are in place, consistently followed, and maintained.	
Minimum	Level 1	There are documented procedures for the closure of incidents.
Recommended	Level 2	The procedures for the closure of incidents ensure that customers agree to closure before incidents are closed.
Preferred	Level 3	The procedures for the closure of incidents are consistently followed by the Service Desk.
Optimal	Level 4	The procedures for the closure of incidents are regularly reviewed for continual improvement.

3.105	<b>Reopening of Incidents:</b> Documented procedures for the reopening of incidents are in place, consistently followed, and maintained.	
Minimum	Level 1	There are documented procedures for the reopening of incidents.
Recommended	Level 2	The procedures for the reopening of incidents enable reporting of the number and percentage of reopened incidents for a specified timeframe.
Preferred	Level 3	The procedures for the reopening of incidents are consistently followed by the Service Desk.
Optimal	Level 4	The procedures for the reopening of incidents are regularly reviewed for continual improvement.

3.110	<b>Continual Improvement of Service Desk Processes/Procedures:</b> Activities are in place to continually identify and implement improvements within the Service Desk.	
Minimum	Level 1	There are documented procedures for the reopening of incidents.
Recommended	Level 2	Processes and procedures critical to the ongoing operation of the Service Desk are regularly reviewed to identify deficiencies and improvement opportunities.
Preferred	Level 3	Relevant stakeholders outside of the Service Desk actively participate in the activities to review and improve Service Desk processes and procedures.
Optimal	Level 4	The Service Desk regularly makes improvements to processes and procedures, and communicates the updates to relevant stakeholders, in a timely manner.



### Measuring Maturity in Category 4.0:

The maturity levels for activities in category 4.0 are the same across all activities, and are:

Minimum	Level 1	<b>Measured</b> — Performance data is collected and reported on a regular schedule (e.g., monthly, quarterly, twice yearly, or yearly).
Recommended	Level 2	<b>Comparison to Goals/Targets</b> — Reports show performance data compared against a defined, quantitative performance goal/target.
Preferred	Level 3	<b>Trending to Goals/Targets</b> — Reports show performance data trending toward the established goal/target over the previous six months (or equivalent reporting periods).
Optimal	Level 4	<b>Consistently Meeting Goals/Targets</b> — Reports show the established performance goal/target has been achieved or exceeded in at least nine of the previous twelve months (or equivalent reporting periods).

### Category 4.0: Performance Results

Performance results are the output of collecting and reporting performance data. Actual performance must be tracked and compared to an established target in order to measure progress and proactively identify negative trends that might impact the degree of customer or user satisfaction.

4.010	<b>Number of Incidents/Service Requests Logged:</b> The number of incidents/service requests logged by the Service Desk from contacts received from all support channels (e.g., phone, email, chat, web request, walk-up, fax, etc.).
4.011	<b>Number of Incoming Contacts:</b> The number of incoming contacts received by the Service Desk from all support channels (e.g., phone, email, chat, web request, walk-up, fax, etc.).
4.012	<b>Contacts to Tickets Ratio:</b> The percentage of incoming contacts from all support channels for which tickets are logged (e.g., phone, email, chat, web request, walk-up, fax, etc.).
4.020	<b>Average Time to Respond:</b> The average time required for the Service Desk to answer or respond to incoming contacts from all support channels (e.g., phone, email, chat, web request, walk-up, fax, etc.).
4.030	<b>Abandon Rate:</b> The number of contact attempts from all support channels (e.g., phone, email, chat, web request, walk-up, fax, etc.) that are terminated by the user prior to establishing contact with a Service Desk staff.
4.040	<b>Incident Resolution Time:</b> The average time to restore service for incidents that are resolved within the Service Desk.
4.050	<b>First Contact Resolution Rate:</b> The percentage of incidents resolved during the initial contact between the customer and the Service Desk.
4.055	<b>First Level Resolution Rate:</b> The percentage of incidents resolved between the customer and the Service Desk without escalation to another support group.

## References

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- **ITIL** – Axelos is the provider of ITIL best practices, certifications and documentation: <https://www.axelos.com/best-practice-solutions/itil>. See Glossary below and the ITIL glossary published by Axelos: [https://www.axelos.com/Corporate/media/Files/Glossaries/ITIL\\_2011\\_Glossary\\_GB-v1-0.pdf](https://www.axelos.com/Corporate/media/Files/Glossaries/ITIL_2011_Glossary_GB-v1-0.pdf).
- **Help Desk Institute (HDI)** Provides education, certification and support for Service Desk management. <http://www.thinkhdi.com/>.
- **UNM Policy Manual Section 2500-2599:** Electronic Management Systems, especially 2500, Acceptable Computer Use: <http://policy.unm.edu/university-policies/2000/2500.html>; 2550 for Information Security: <http://policy.unm.edu/university-policies/2000/2550.html>; and Security Controls and Access to Sensitive and Protected Information 2520 <http://policy.unm.edu/university-policies/2000/2520.html>
- University Counsel advises on **Copyright & Fair Use:** <http://counsel.unm.edu/resources/copyright-matters.html>
- **Accessibility/ADA guidelines** are offered by Accessibility Services for students <http://as2.unm.edu/>, and the Physical Plant <https://iss.unm.edu/PCD/university-planning/facility-access-ada.html>.
- **FERPA.** Guidance for complying with the Family Educational Rights and Privacy Act (FERPA) are provided by the Registrar: <https://registrar.unm.edu/privacy-rights/ferpa.html>.
- **UNM Policy Property Management.** <https://policy.unm.edu/university-policies/7000/7710.html>. Disposition of Equipment: <https://policy.unm.edu/university-policies/4000/4610.html>.

## Appendix A – Glossary of Service Desk-Related Terms

Definitions of the following terminology used in this standard are taken from Internet sources, including Axelos, Wikipedia, HDI, ITIL and others, accessed February, 2016.

**Call or Contact Center** – A call center is a centralized, possibly virtual, office used for receiving and transmitting a large volume of telephone calls. A contact center is a point from which customer contacts are managed through a coordinated system of people, processes, technologies and strategies that provide access, information, expertise, and communication, enabling interactions that create value for the customer and organization.

**Customer** – The customer is the organizational entity who pays for, funds or underwrites a service. The customer may also make the decision to fund the service to ensure meeting organizational objectives. The customer may or may not actually use the service, device or product.

**Electronic Support** – Type of end user support provided by an IT staff person to a user through an electronic method. Includes chat, email, ticket submission via web form, and remote control support.

**Escalation** – Escalation refers to the increase in the intensity of attention on an activity. ITIL defines two types that are not mutually exclusive:

- **Functional Escalation** refers the process of passing, referring or assigning an Incident or Service Request from one team to another – for example, assigning an issue with a database backup to the DBA team.
- **Hierarchical Escalation** refers to a process whereby an incident or service request is escalated to a higher level of management or authority.

**Help Desk** – A help desk is a resource, often a physical desk, which provides the customer or end-user with information and support related to specific products and services. Support can consist of technical troubleshooting, guidance, or direction, among other services.

**Help Desk Institute (HDI)** – The Help Desk Institute is an association for technical support professionals offering training, certification, benchmarking reports, collaboration, publications, and conferences. The mission of HDI is to elevate the customer experience through the development of the technical support industry.

**Incident** – An incident is an unplanned interruption to an IT service or a reduction in the quality of an IT service. Incident management describes the activities of an organization to identify, analyze, and correct hazards to prevent a future re-occurrence, as well as to restore services to normal operation as quickly as possible.

**ITIL - ITIL**, formerly an acronym for **Information Technology Infrastructure Library**, is a set of practices for **IT service management** (ITSM) that focuses on aligning IT services with the needs of business. In its current form (known as ITIL 2011 edition), ITIL is published as a series of five core volumes, each of which covers a different ITSM lifecycle stage. Although ITIL underpins **ISO/IEC 20000** (previously BS 15000), the International Service Management Standard for IT service management, there are some differences between the ISO 20000 standard and the ITIL framework.

ITIL describes processes, procedures, tasks, and checklists which are not organization-specific, but can be applied by an organization for establishing integration with the organization's strategy, delivering value, and maintaining a minimum level of competency. It allows the organization to establish a baseline from which it can plan, implement, and measure. It is used to demonstrate compliance and to measure improvement. ITIL is based on Edwards Deming's plan-do-check-act (PDCA) cycle. ITIL is used worldwide in IT organizations and embodies best practices for IT Service Management.

Since July 2013, ITIL has been privatized and is now owned by [AXELOS](#), a joint venture between [Capita](#) and HM [Cabinet Office](#). AXELOS licenses organizations to use the ITIL intellectual property, accredits licensed examination institutes, and manages updates to the framework. ITIL Glossary & abbreviations: [https://www.axelos.com/Corporate/media/Files/Glossaries/ITIL\\_2011\\_Glossary\\_GB-v1-0.pdf](https://www.axelos.com/Corporate/media/Files/Glossaries/ITIL_2011_Glossary_GB-v1-0.pdf).

**IT service management (ITSM)** refers to the entirety of activities – directed by policies, organized and structured in processes and supporting procedures – that are performed by an organization or part of an organization to plan, deliver, operate and control IT services offered to customers. It is thus concerned with the implementation of quality IT services that meet the needs of customers, and is performed by the IT service provider through an appropriate mix of people, processes and information technology.

**Knowledgebase** – A knowledgebase is a technology used to store complex structured and unstructured information. It is searchable.

**Onsite Support** – Type of end user support provided in person. Includes deskside support (IT staff traveling to the user's location).

**PDCA** – Plan-Do-Check-Act is an iterative four-step management method used in business for the control and continuous improvement of processes and products. It is also known as the Deming circle.

**Problem** - Problem Management is the process responsible for managing the lifecycle of all problems. The primary objectives of problem management are to prevent problems and resulting incidents from happening, to eliminate recurring incidents, and to minimize the impact of incidents that cannot be prevented. The [Information Technology Infrastructure Library](#) defines a problem as the cause of one or more [incidents](#). The activity of Problem Management is to diagnose the root cause of incidents.

**Request Fulfillment** – Request fulfillment consists of sub-processes:

1. Request support is a process to provide and maintain the tools processes, skills and rules for an effective and efficient handling of service requests;
2. Request logging and categorization records the request for swift and effective processing;
3. Request execution processes the request in the agreed time frame;
4. Request monitoring and escalation monitors the status of outstanding requests so that counter measures may be introduced if service levels are breached; and
5. Request closure and evaluation which ensures that desired quality is met before closing the request.

**Service Desk** – is a primary IT function within the discipline of IT service management as defined by the Information Technology Infrastructure Library (ITIL). The Service Desk provides a single point of contact to meet the communication needs of both users and IT staff, executes the Request Fulfillment and Incident Management processes, and offers user support through one or several of the following types of support: telephone support, onsite support, electronic support, or self-service support.

**Self-service Support** – Type of end user support that enables a user to obtain support without the aid of a human. Includes knowledgebase and online password change.

**Service Request** – a formal request from a user for something to be provided. Examples include a request for information or advice, to reset a password, to gain system access, or to install a workstation for a new user.

**Telephone Support** – Type of end user support provided by the Service Desk to an end user via a phone call.

**User or End-user** – A person who ultimately used a product, device or service. This person may or may not actually pay for the use of the service.