



Content Management training

Module 3: Problem Management

Complete the dashboard

number	step	consequences
The first step		
The second step		
The third step		
The fourth step		
The fifth step		
The sixth step		
The seven step		
The eight step		
The ninth step		
The final step		



Steps

- ✓ a two-part process, which involves investigating and diagnosing the problem
- ✓ to identify a workaround for the problem
- ✓ to review the problem
- ✓ to log the problem
- ✓ to prioritise the problem
- ✓ to detect the problem
- ✓ to raise a known error record
- ✓ to close the problem
- ✓ to categorise the problem
- ✓ to resolve the problem

Consequences

- Problems should be resolved whenever possible. Resolution resolves the underlying cause of a set of incidents and prevents those incidents from recurring. Some resolutions may require a change in the management board, as they may affect service levels. For example, a database switchover may cause slowness during the switchover period. All risks should be evaluated and accounted for before implementing the resolution. Document the steps taken to resolve the problem in the organisation's knowledge base.
- In an ITIL framework, problems are logged in a problem record. A problem record is a compilation of every problem in an organisation. This can be accomplished via a ticketing system that allows for problem ticket types. Pertinent problem data, such as the time and date of occurrence, the related incident(s), the symptoms, previous troubleshooting steps, and the problem category all help the problem management team research the root cause.
- A problem is raised either through escalation from the service desk, or through proactive evaluation of incident patterns and alerts from event management or continual service improvement processes. Signs of a problem include incidents that occur across the organisation



with similar conditions, incidents that repeat despite otherwise successful troubleshooting, and incidents that are unresolvable at the service desk.

- A problem's priority is determined by its impact on users and on the business and its urgency. Urgency is how quickly the organisation requires a resolution to the problem. The impact is a measure of the extent of potential damage the problem can cause the organisation. Prioritising the problem allows an organisation to utilise investigative resources most effectively. It also allows organisations to mitigate damage to the service level agreement (SLA) by reallocating resources as soon as the issue is known.
- Problem categorisation should match incident categorisation. Incident [and problem] categorisation involves assigning a main and secondary category to the issue. This step is beneficial in several ways. One benefit is that it allows the service desk to sort and model incidents that occur regularly. The modeling allows for automatic assignment of prioritisation. The third and most important benefit is the ability to gather and report on service desk data. This data allows the organisation not only to track problem trends, but also to assess its effect on service demand and service provider capacity.
- A workaround should always be indicated, because problems are not resolved at the incident level. A workaround enables the service desk to restore services to users while the problem is being resolved. A problem can take from an hour to months to resolve; therefore, a workaround is vital. A problem is considered open until resolved, so a workaround should only be considered a temporary measure.
- This is also known as a major problem review. The major problem review is an organisational activity that prevents future problems. During the review, the problem management team evaluates the problem documentation and identifies what happened and why. Lessons learned, such as process bottlenecks, what went wrong, and what helped should be discussed. This is where having a complete problem log will help. A completed log will work much better than trying to pull the details from memory. This problem review should result in improved processes, staff training, or more complete documentation.
- Once the workaround has been identified, it should be communicated to the staff within the organisation as a known error. It's good practice to record a known error in both an incident knowledge base and what ITIL calls a known error database (KEDB). Documenting the workaround allows the service desk to resolve incidents quickly and avoid further problems being raised on the same issue.
- This step should only occur after the problem has been raised, categorised, prioritised, identified, diagnosed, and resolved. While many organisations stop at this step, it isn't the last.
- The speed at which a problem is investigated and diagnosed depends on its assigned priority. High-priority issues should always be addressed first, as their impact on services is the greatest. Correct categorisation helps here, since identifying trends is easier when



problem categories correlate to incident categories. Diagnosis usually involves analysing the incidents that lead to the problem report as well as further testing that may not be possible at the service desk level, such as advanced log analysis.