Problem Management helps to identify the cause of an error in the IT infrastructure, reported as occurrences of related incidents.

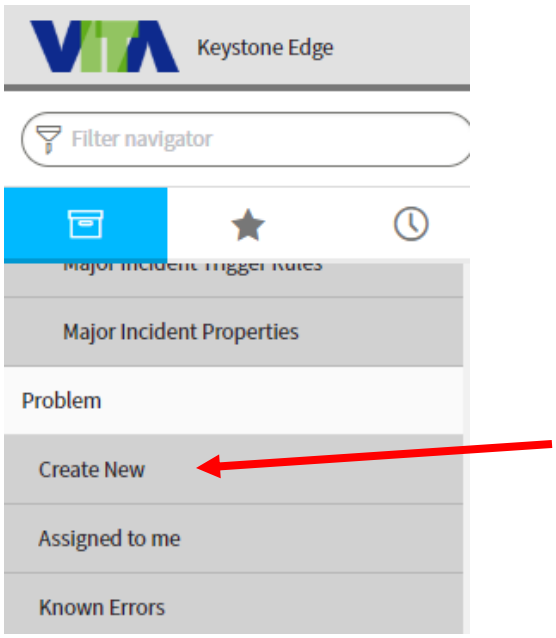
Resolving a problem means fixing the error that will stop these incidents from occurring in the future. While Incident Management deals with fighting symptoms to incidents, Problem Management seeks to remove the causes of incidents permanently from the IT infrastructure. Problem resolution and elimination of root cause often calls for applying a change to the configuration item in the existing IT environment.

Creating a Problem Ticket

There are two (2) ways to create a new Problem Ticket (may also be referred to as a Problem Record):

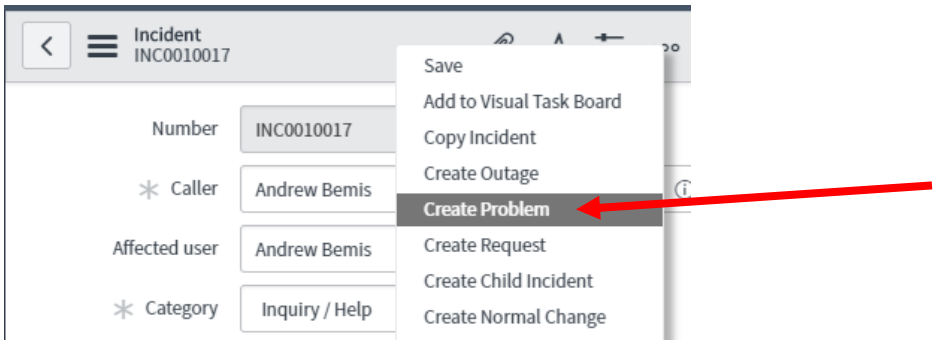
In the Application Navigator, navigate to the Problem application.

Click **Create New.**

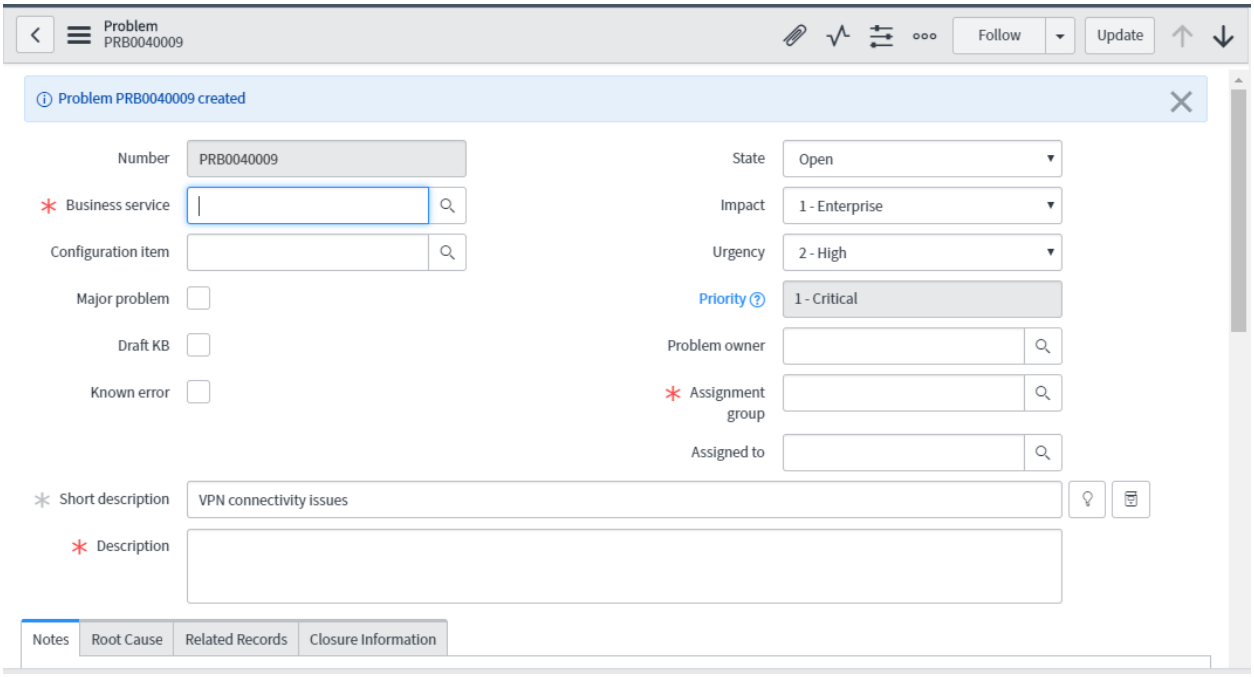


Or,

In the Incident ticket related to the Problem, right-click the Incident header bar and select **Create Problem.**



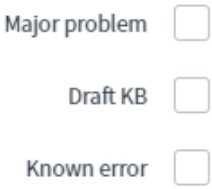
The Problem record will be displayed.



Problem investigation may result in the discovery of a **Known Error**. A Known Error is a problem for which the root cause is known and a temporary workaround or a permanent fix has been identified. The implementation of a permanent fix may be in the future.

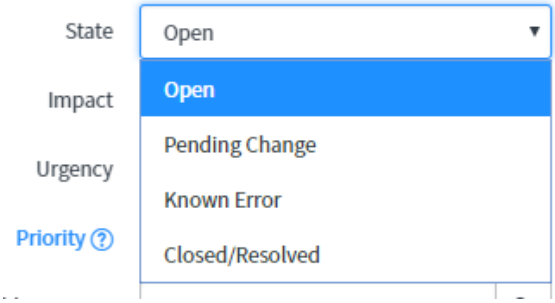
To identify a problem issue as a known error:

In the Problem ticket, click the checkbox next to Known Error.



Or,

Choose the State of Known Error.



To see a list of Known Errors:

1. In the Application Navigator, navigate to **Problems.**
2. Click **Known Errors.**
3. A list of Problem tickets marked as Known Errors will be displayed.

Number and Priority fields are auto-populated.

In addition to the fields that are automatically populated when the form is opened, information will be imported from the Incident Record into the new Problem Record.

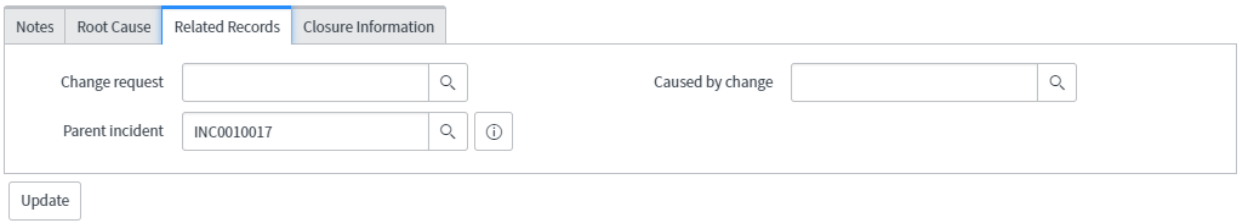
Once the Problem ticket has been created, **complete all required fields**.

🕮 A notice will be display upon Update or Submit if required fields are not completed.

a. Configuration Item – Use Search Glass to find item in the Look Up list.

b. Related Incident Number – This is required if the problem record is generated as a result of a P1 or P2 Incident. The Incident number is displayed in the Related Records section of the Problem record.

📖 Enter the individual incident number or the Parent incident number if there is a Parent ticket.



c. Short Description – a brief description to help identify a Problem in the problem queue.

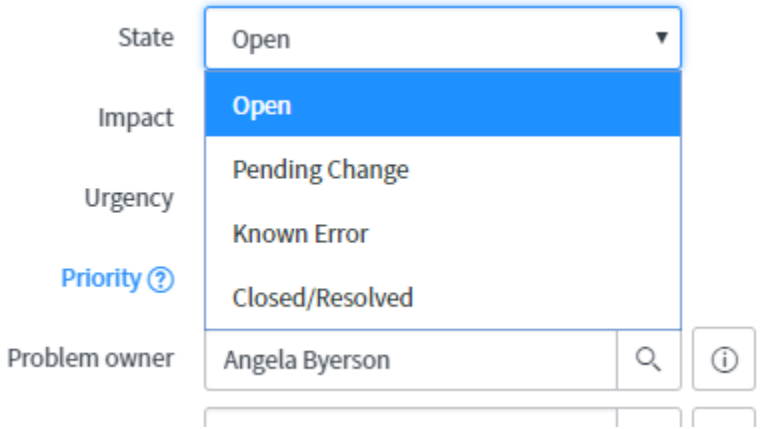
d. Description – Detailed explanation of what is known at the time the Problem record is created.

Save or Submit.

a. Right-click the header to save and continue working in this Problem record.

b. Click Submit button to save and submit the ticket.

The Problem record state should be updated to reflect the progression of the Problem. States include:



○ **Open**

○ **Pending Change**

- After a Change Request (CR) has been submitted for review and approval. The CR will be created in accordance with the Change Management process. A problem record cannot be resolved in this state.
- If an urgent change was required to fix the error, the emergency CR process is initiated via the Change Management process.
- After the CR is implemented, the problem record should remain open until it is confirmed that additional incidents are not occurring. Upon Resolution/Closure, the Closure Code should be set to Change Implemented.
- If a completion date is known, this date can be entered in the Work Notes field.

○ **Known Error**

- Not all problems with a state of Known Error need to be resolved or closed. Known Errors could remain open because the resolution is too expensive, technically impossible, or requires too much time to resolve. The benefit of leaving the problem open is so future incidents can be related to one problem. (Problem records will not auto-close).
- If the number of related incidents continues to increase, the Priority of the problem should be increased and the problem should be reevaluated. Problems assigned this state need to be reviewed periodically. If a CR will not be created and the problem is going to stay open to collect related Incidents, then a Workaround entry may be created to document a workaround.
- It is vital that data on the CIs, symptoms, and resolution or workarounds relating to all Known Errors is recorded in the record. This data is then available for Incident matching, providing guidance during future investigations and incidents.

○ **Closed/Resolved**

The row of tabs below the Problem information include:

1. **Notes**

Work notes are entered here.

A **Workaround** provides a method of accomplishing a task when that task cannot be accomplished in its usual manner. The communication of a Workaround is entered and handled in a Problem ticket.

Record the information about the Workaround in the record section named **Workaround**.

> 🕮 This information may be Customer Visible as part of a notification which will be sent to a caller(s) of related incidents. This information may also display in a section of the incident tickets which would be available to a customer through the customer's view.

2. **Root Cause** Information

   a. To record the draft Root Cause Analysis (RCA):

   - Select an appropriate **Root Cause** from a dropdown list.
   - Select an appropriate **Root Cause Item** from a dropdown list.
   - Enter details about the **Root Cause** in the Incident narrative.
   - Enter relevant known details in the **Diagnose** and **Analyze** narratives.
   - Enter **Final Recommendation(s).**

3. **Related Records**

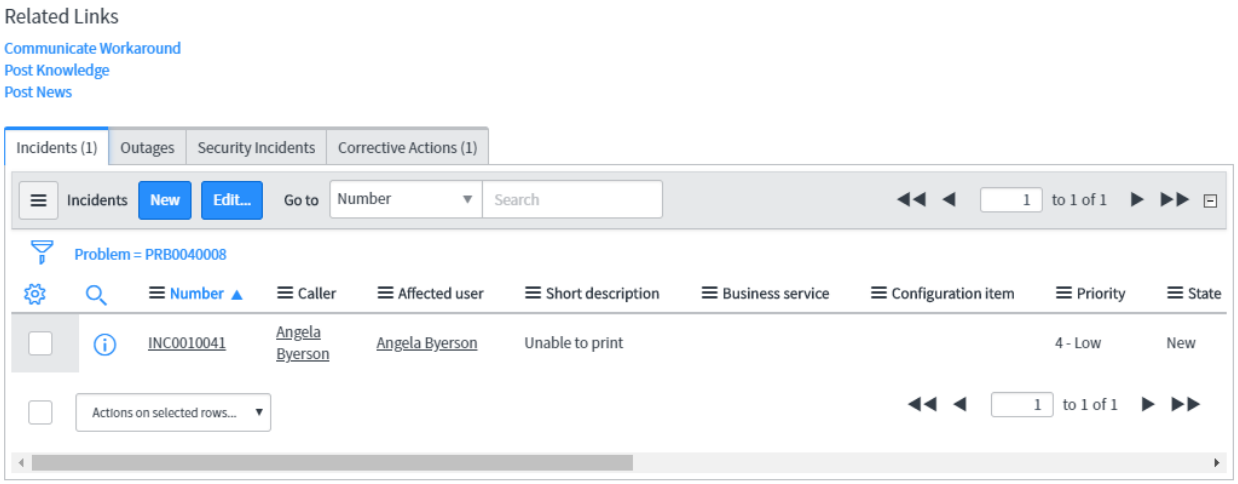
   Any related incidents or changes are recorded here.

4. **Closure Information**

   a. Select an appropriate **Closure Code** from a dropdown list.

   b. Enter the **Close Notes** documenting the important information related to the closure of the Problem ticket.

   c. Update the **State** from the dropdown list in the upper right hand corner.



Related Links

> These features may result in communication with customers. Attention to communication policies, procedures, and guidelines is recommended.

a. **Communicate Workaround**

- Use this link to share the workaround. The end user for each related incident will receive an email with the information contained in the Workaround field,

b. **Post Knowledge** - Create a new knowledge article from a problem immediately, rather than when the problem closes. The knowledge article will be in a draft state.

- The short description becomes the knowledge article short description.
- The problem description and work notes become the knowledge article text.

c. **Post News** – Publish a news article about this problem in the Knowledge Base.

- The short description becomes the knowledge article short description.
- The problem description and work notes become the knowledge article text.

Tabs on bottom of ticket:

Incidents – Add / Edit / View incidents related to this problem.

Outages – Enter information about an outage related to the Problem. This includes planned outages, degradations, and unplanned outages.

Add new information and / or edit outage information.

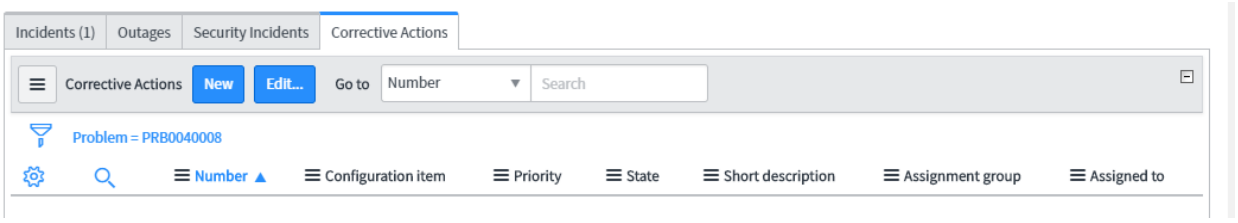
Duration will auto-complete upon Submit using Begin and End date and time.

> Please be sure to follow all processes and procedures regarding outages. You may have additional reporting and communicating responsibilities related to outages.

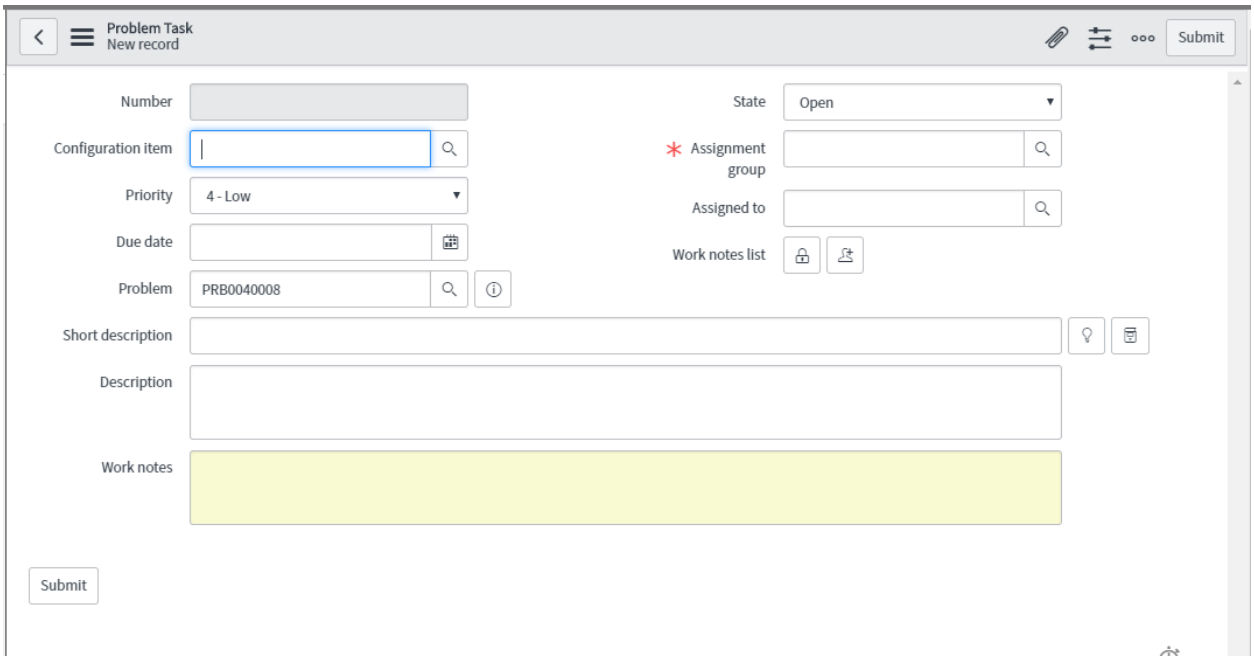
Security Incidents – Enter information about any security incident related to the Problem.

Corrective Actions - Add / Update / View tasks associated with investigating and resolving this problem.

To create a Problem Corrective Action Task, the user will begin by scrolling down to the **Corrective Actions** Section.



Click the **New** button.



In the new **Problem Task** form enter the required information:

a. Enter the **Due Date** by clicking on the Calendar icon and selecting the date and time for the Task completion.

b. Enter the **Assignment Group** by clicking on the Hourglass icon and selecting the appropriate group to complete the Task.

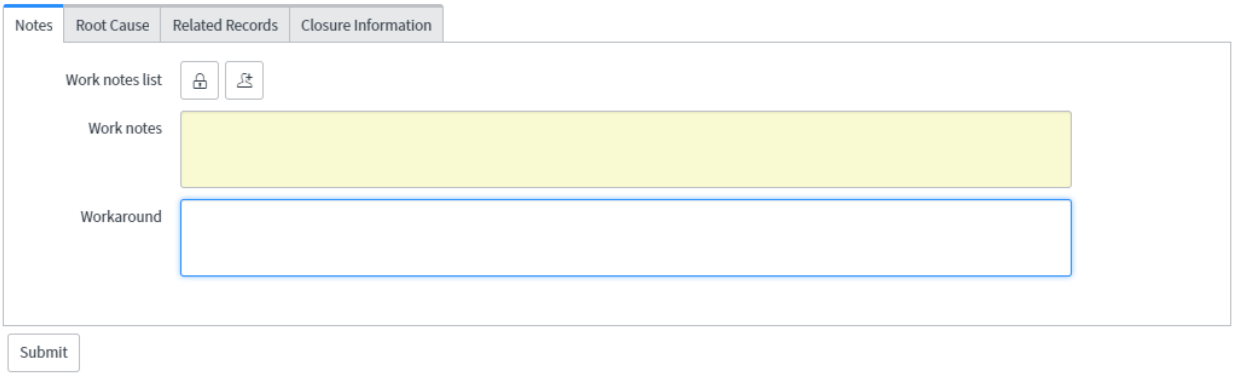
c. **Short Description** – Enter a brief description to help identify the Task issue.

d. **Description** – Enter a detailed explanation of what is known at the time the Task record is created and what is required to fulfill and complete the Task.

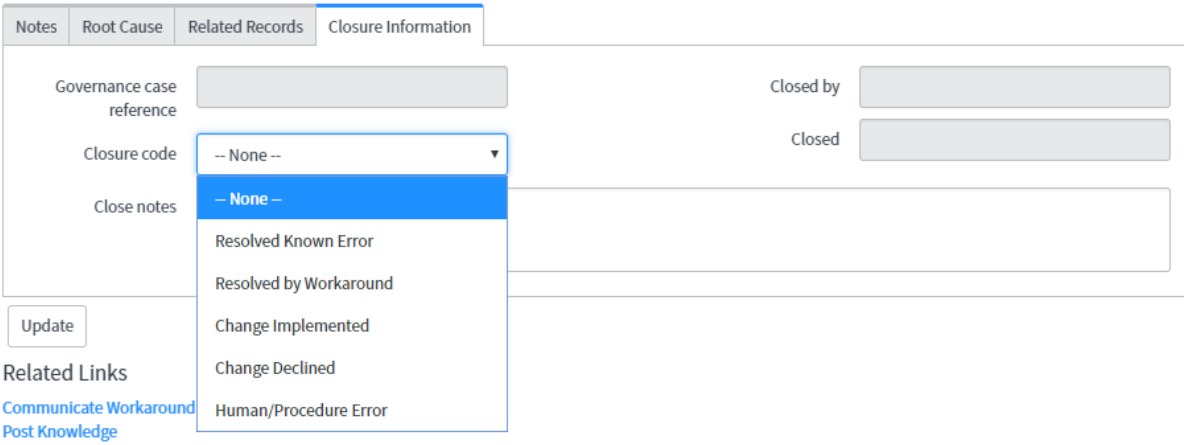
Save or **Submit**

a. Right-click the header to save and continue working in the Task record.

b. Click Submit to save and submit the ticket.



For a Problem, the Closure Codes are as follows:



1. If the resolution did not require a Change Request (CR):

   - Resolved Known Error – The Problem state may be left as Resolved if this resolution may be used again in similar cases. The state may be set to Closed if the error is known with no expectation to repeat.

   - Resolved by Workaround - The Problem state may be left as Resolved if this workaround may be used again in similar cases. The state may be set to Closed if the workaround used prevents additional incidents.

   - Human/Procedure Error

2. If the resolution did require a Change Request (CR):

- Change Implemented - The resolution did require a CR to fix the problem and was successfully implemented. The final Problem state selection for this scenario may vary depending on the final outcome.
- Change Declined - CR was submitted for approval and declined. This scenario may depend on various business factors and the final Problem state selection for this scenario may vary depending on the reason for the decline.