ITSM Tool Evaluation FY2013
Project Scope

Start date: 8/29/2012
End date: 10/31/2012

Sponsors: Barbara Goguen and Mark Silis

Participants:
Drew Bonvie
Dave Conlon
Jozsef Doczi
Chris Gresham
Steve Landry
Tim McGovern
Chris Murphy
Stu Peloquin
Jessica Donnelly Reed
Patricia Sheppard
Anne Silvester
Oliver Thomas
Garry Zacheiss

Scope:
Release Core has been charged to facilitate a tool discovery process in the IT Service Management space with additional thought leaders and stakeholders in IS&T. We plan to evaluate 3 options by having vendors, and where possible, sister institutions demonstrate how they have implemented the lifecycle of a service request in their ITSM environment. Usability, customer interface, web APIs and CMDB functionality will also weigh in on the decision making. We will have a short list of what each product does really well and what each product does poorly. Based on that, a recommendation will be made to our sponsors no later than October 31, 2012.

Tool Selection:

1. BMC RemedyForce Service Desk (Peter Grammaticas pete_grammaticas@bmc.com)
2. BMC Remedy OnDemand 8.0 (Peter Grammaticas pete_grammaticas@bmc.com)
   a. Stanford has implemented service request (Anne Pinkowski apink@stanford.edu)
3. ServiceNow 3.0 (Karam Maira karam.maira@servicenow.com)
   a. Northeastern has implemented service request (Brighid Whalen b.whalen@neu.edu)

User Stories:

Below are user stories that we would want to see implemented in each tool. The use cases have been designed to illustrate not just request fulfillment, but also how the initial request triggers other processes, such as change management and incident response. The goal is to see how each tool facilitates the users request, roles and authorizations, approval workflow and, most importantly, how it would best handle or solve the issues that arise along the way.

1. Self service scenario
   A staff person wants to create a mailing list for her project team. (This is currently done by going to https://listmaker.mit.edu). She finds the option via the service catalog and…

   Demonstration should include:
   - Auto-creation of a (closed) ticket on being sent to a third party site
   - Some sort of callback from the third party site to indicate the user completed the task successfully, or was unsuccessful and requires further assistance
   - An easy way back to the service catalog for the case where a user has selected a punch out option by accident

2. Approval/authorization scenario
   An employee has been asked by his supervisor (research faculty) to download a piece of software onto the faculty laptop. He locates the software via the service catalog and begins the request process. He is presented with a form that gives him options as to the type of license, number of licenses, etc. The request attempt succeeds in some cases and fails in others, depending on the employee's authorizations…

   Demonstration should include:
   - A complete unacl'ed form that lets anyone submit a request, but has divergent behavior depending on the user's role:
     - Student: auto-authorize
     - Staff member: generate authorization to their supervisor of record
     - System unable to determine appropriate supervisor: generate case for support analyst to manually authorize

3. Approval/chargeback scenario
   A staff person in IS&T needs a new laptop with a non standard desktop configuration. She finds the Desktop Deployment service via the service catalog and fill out the request, which requires a cost object to charge the purchase.

Once approved, the purchase needs to be made, inventory needs to be received and the hardware deployed to a specific location…

Demonstration should include:
- Approval for the content of the request (manager)
- Approval of the dollar amount (finance staff)
- Asset tracking (this inventory is currently kept in a filemaker database)
- Integration with an ERP (a Journal Voucher is currently entered into SAP)

Additional questions that should inform and direct the demonstrations:
1. What does the customer see?
2. What does the support analyst/operational staff see?
3. What happens if the self service process fails?
4. Will unsuccessful attempts create a ticket for a Help Desk agent? How and when do service requests generate incidents?
5. Is there a record of the transaction if it is aborted?
6. Is there a breadcrumb path so a support analyst can recreate or retrace the customer's steps?
7. Is there a way that the request can be saved in draft so a support analyst could assist the customer in filling it out? When request attempts fail and human intervention or "vetting" needs to happen, is there enough information retained for a support analyst to send an email or research the issue?
8. Can data from the CMDB can be pulled to prepopulate a form?
9. What are the exception paths?
10. Could a form in the ITSM tool drive an API (web service or otherwise) to complete a request (as opposed to punching the user out to a completely separate site)? See self service scenario…