**Description of cases for PoC**

**For ITSM System**

1. The Catalogue of IT services

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|  | Action |
| Case 1 | Creating and maintenance of the catalogue of IT |
| Case 2 | Registration of the request via the catalogue of IT services |

1. Service Request

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|  | ***Creating of the request*** | ***Receiving of the request*** | ***Initial analysis of the request*** | ***Priority and classification of the request by IT services*** | ***Working on the request*** | ***Closing the request*** |
| Case 3  Registration, categorization, and escalation of the request | User creates a request using portal/email/IVR system/Chat bots/messengers where the initiator must fill the description of the request. | Request comes to the system with status “Open”. Contact data of the user should be filled automatically (Name, job title, department, location, phone number, email), subject and summary, source of the request, request type by default – service request, ticket number. If the request is duplicated it should be closed. | If the request is unique, an initial analysis is being carrying out. If there is not enough data, the data should be refined and added by first level support specialist. | The request should be classified by the type (service request, incident, problem, access change request). According to SLA specialist sets the necessary priority of the request. | After classification first level support specialist tries to solve the request by him/herself. In case of success the request’s status changes on “Resolved”, otherwise, ticket should be escalated to the second level support. Specialist of the second level support resolves the ticket, in case of inability escalates to the third level support. Specialist of the third level support resolves the ticket and sets the status “Resolved”. Otherwise, ticket’s status sets as “On Hold” until the ticket will not be resolved. | The request closes by the initiator only. The request should be set in status “Closed” after 48 hours automatically if user does not have remarks. In 48 hours, user can return the ticket to refinement. Status “In progress” should be set.  Initiator has to evaluate the quality of the performing the request when the request closes. |

1. Service Request for IT equipment.

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|  | ***Creating of the request*** | ***Receiving of the request*** | ***Initial analysis of the request*** | ***Priority and classification of the request by IT services*** | ***Registration of the request, sending for approval*** | ***Receiving an item from warehouse and registration in CMDB*** | ***Preparation and providing of the asset*** | ***Closing the request*** |
| Case 3  Providing equipment | User creates a request using portal/email/IVR system/Chat bots/messengers where the initiator must fill:   1. Request’s description 2. Select from the list necessary equipment 3. Justification 4. If the equipment is ordered for another employee, user has to fill another employee’s data   After registration the request should be send for approval to the manager of the initiator. | The request comes to the system with the status “Open”. Contact data of the user should be filled automatically (Name, job title, department, location, phone number, email), subject and summary, source of the request, request type by default – service request, ticket number. If the request is duplicated it should be closed. | If the request is unique, an initial analysis is being carrying out. If there is not enough data, the data should be refined and added by first level support specialist. | The request should be classified by the type (service request, incident, problem, access change request). According to SLA specialist sets the necessary priority of the request. | The requisition creates in the ERP system. Request sets status “In progress”. | If the requisition approved, the equipment will be received from the warehouse. New asset is registered in CMDB. | The IT specialist prepares the equipment and provides prepared asset. The request’s status changes to “Resolved”. After status changes to “Resolved” initiator should receive an email about equipment receiving/checking notification automatically. | The request closes by the initiator only. The request should be set in status “Closed” after 48 hours automatically if user does not have remarks. In 48 hours, user can return the ticket to refinement. Status “In progress” should be set.  Initiator has to evaluate the quality of the performing the request when the request closes. |

1. Access Change

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|  | ***Creating of the request*** | ***Receiving of the request*** | ***Initial analysis of the request*** | ***Priority and classification of the request by IT services*** | ***Registration of the request, sending for approval*** | ***Making changes in the Access Matrix*** | ***Access providing*** | ***Closing the request*** |
| Case 4  Access Change | User creates a request using portal/email/IVR system/Chat bots/messengers where the initiator must fill:   1. Select system from the list. 2. Justification 3. If the access required for another employee, user has to fill another employee’s data.   After the request’s registration, the request should be sent for approval to the initiator’s manager | The request comes to the system with the status “Open”. Contact data of the user should be filled automatically (Name, job title, department, location, phone number, email), subject and summary, source of the request, request type by default – service request, ticket number. If the request is duplicated it should be closed. | If the request is unique, an initial analysis is being carrying out. If there is not enough data, the data should be refined and added by first level support specialist. | The request should be classified by the type (service request, incident, problem, access change request). According to SLA specialist sets the necessary priority of the request. | The request for approval for Manager of Information Security forms and the request’s status sets as “In Progress”. | If the request approved, changes are added in the Access Matrix. | The specialist provides an access and status sets as “Resolved”. After status changes to “Resolved” initiator should receive an email notification automatically for checking. | The request closes by the initiator only. The request should be set in status “Closed” after 48 hours automatically if user does not have remarks. In 48 hours, user can return the ticket to refinement. Status “In progress” should be set.  Initiator has to evaluate the quality of the performing the request when the request closes. |

1. Incident

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|  | ***Creating of the request*** | ***Receiving of the request*** | ***Initial analysis of the request*** | ***Priority and classification of the request by IT services*** | ***Registration of the request*** | ***Working on the request*** | ***Closing the request*** |
| Case 5  Incident | User creates a request using portal/email/IVR system/Chat bots/messengers where the initiator must select the services from the list, define urgency and impact of the incident. | The request comes to the system with the status “Open”. Contact data of the user should be filled automatically (Name, job title, department, location, phone number, email), subject and summary, source of the request, request type by default – service request, ticket number. If the request is duplicated it should be closed. | If the request is unique, an initial analysis is being carrying out. If there is not enough data, the data should be refined and added by first level support specialist. Urgency and impact should be refined. If the request is not an incident than the process occurs according to the algorithm of service request. | If the request is an incident, priority P1-P4 according to Priority Assessment matrix. | The incident’s status sets as “in Progress”. The specialist assigns to the Incident. | The first, second or third level support are working on the resolution of the incident. If there is no article in the Knowledge Base, the new КВ article should be written.  After status changes to “Resolved” initiator should receive an email notification automatically for checking. | The request closes by the initiator only. The request should be set in status “Closed” after 48 hours automatically if user does not have remarks. In 48 hours, user can return the ticket to refinement. Status “In progress” should be set.  Initiator has to evaluate the quality of the performing the request when the request closes. |

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|  | Name | Expected results |
| Case 6 | Show the ability to identify and register incidents automatically via Service Resource System Model | Organization must receive information about problematic configuration assets for analysis and taking preventive actions via identifying and registration of incidents automatically. |

1. Monitoring of service delivery date

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|  | ***Working on the request*** | ***Control*** | ***Execution date expired*** |
| Case 7  SLA Control | If the deadline for performing the request/incident/request for change expired request should be highlighted in red. | Manager of specialist receives an email notification about expiration SLA deadlines. | Deadline is not met.  Manager writes a note to the request about reasons of exceeding the parameters of SLA. |

1. Request search

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|  | ***Search*** |
| Case 8 | Search should work by ticket number, date, specialist, user, status, department, type of the request, in addition, filters should be available by all fields of the request with ability to download the list in excel, html, pdf formats. |

1. Delegation of the authority for specialists of first, second, third level support

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|  | ***Working on the requests*** | ***Delegation of the authority*** |
| Case 9 | Employee is responsible for performing several requests with different status. | In case employee is out of office system should allow to delegate the authority to another employee or group of employees. |

1. CMDB

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|  | ***Creating the asset*** | ***Asset management*** | ***Search*** | ***Notification*** |
| Case 10 | CMDB should allow to create new assets manually, by scanning QRs/barcodes, automatically via agent, network scanning with ability to attach the files with filling type of asset, inventory number, serial number, kind of asset, contract number (optionally), purchase order number, contract expiry date, price, vendor (manufacturer), duration period, connection with other assets/ elements/processes. | CMDB should allow to change assets parameters, connect assets between each other, build service-resource model of assets by levels. CMDB should inventory of assets, generate different types of reports by assets. | Search should work by asset number, vendor, delivery date and expiry date, contract number, status, department. Filters should be available for all fields with ability to download in excel, html, pdf formats. | Ability to send notifications automatically at the date set manually or automatically a month before the contract expiry date. |

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|  | Action | Expected results |
| Case 11 | In CMDB on examples of several information systems and processes build a service resource model | A logic model on defined level describing composition and connections between assets which provide the system’s and process’s work together should be built. |
| Case 12 | Decompose the total cost of ownership of the information system, service, process. | The solution should allow to analyze connections of IT assets with IT processes and services for counting the cost of IT System. |
| Case 13 | Scanning and gathering information about servers, software, active network devices and other assets. | The system should find servers, network devices, software, patches in organization’s network, update CMDB and add information which was found. |

1. Knowledge base

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|  | ***Writing the article*** | ***Interface*** | ***Search and filters*** |
| Case 14 | Employees of IT and Information Security should have an ability to create articles in Knowledge Base with ability to create article assigned to asset/service with ability to insert pictures and attach files in different formats (word, pdf, jpeg, excel, PowerPoint) during the solution of service requests, incidents, problems and changes. System should allow to categorize an article (article for IT specialists / all users) on systems, processes and services. Ability to edit created articles. | In the list of articles number of the article, name of article, quantity of views, author should appear | Search should work on name, content, service, asset. Ability to filter on author, service, date created. While creating service requests, incidents, system should suggest possible articles on key words. |

1. Problem

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|  | ***Problem registration*** | ***Categorization*** | ***Problem Analysis*** | ***Resolution*** | ***Closing problem*** |
| Case 15  Problem | System should allow to register the problem, system has to suggest to register the problem if there are often registering similar incidents. User registers an incident, during the initial classification incident was not attached to registered problems, data analysis of incident shows the frequency of appearance of the incident, system should allow to register the problem, and attach incidents to it. While registering the problem system/service/processes/assets should be defined and filled. System sends a notification to employees of IT about registration of the problem. | System should allow to categorize the problem by priority, type of asset, system, service, process. | System should allow to handle the problem on actuality, fullness, and credibility. Employee analyzes the problem, system should allow to see incidents connected to the problem, data about affected asset. | Works on troubleshooting perform on the first, second and third levels support. If there is no KB article, the article should be added. If changes are required in Change Management, problem should be shown there. Workaround should be available in the system. | The problem should be closed by manager process or IT Director only. After problem closing, initial analysis on importance of the problem performs. If importance level is high, review is required; if level is not high, problem closes. |

1. Request for Change Management (RFC)

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|  | ***Initializing change*** | ***Planning*** | ***Approval*** | ***Implementation*** | ***Post implementation Review / Evaluation*** | ***Closing*** |
| Case 16 | Create an RFC via template for normal RFC.  Specify the roles of Initiator, Owner of change, Manager of change management implementor.  Attach a file. After creating request for change, all assigned employees should receive an email notification. | In the form for RFC implementer fills parameters: reason, impact, urgency, priority, category, deployment plan, backup plan, risks, window for change and period (start, end date, scheduled downtime).  Links IT assets and affected services (Link should be visible in IT assets and services). Create a link to incident. Change shows in calendar of changes. | RFC automatically goes for approval to commission of experts on CAB changes. Participants vote, Request is approved if more than 70% of CAB participants are agree. Status of request changes to “Approved”.  Email notification sends to all participants. Automatic information for group of users about scheduled downtime  depending on affected services. | Manager of request management creates and assigns tasks  . Responsible employees receive email notifications. Parent task divides on child tickets with different responsible employees. Defines the sequence of tasks (sequential or parallel) and time for each task. Responsible employees add comments in tasks and attach files, take notes of the progress, close tickets. | Attach a document with evaluation of implementation results. | The nature of implemented change to be set  (successful).  If one of the tasks was not closed, RFC cannot be closed. Notification about open task appears.  After closing RFC the report about scheduled and actual plan is available.  (widget or table with ability to export to Excel). All history on change should be available. |

1. Reporting

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|  | ***Exporting reports*** | ***Format*** |
| Case  17 | System should allow to export following reports:  1. Quantity of registered tickets for any defined period, sorted by specialists, group of specialists, initiator, departments, all requests.  2. Overall quantity of resolved requests/incidents/service requests/problems/changes/request for asset for any defined period sorted by specialists, group of specialists, services, types, priorities, statuses, sources, categories  3. Ability to export reports on all fields of requests: subject, summary, ticket number, priority, status, source, specialist, resolution, group of specialists, department, category, tags, initiator, type of request/incident/service request/problem/change/asset.  4. Quantity of requests/ incidents/service requests/problems/changes/assets.  5. Quantity of requests/ incidents/service requests/problems/changes/assets resolved at time.  6. Problems affected on services  7. Quantity of RFC for defined service.  8. Quantity of RFCS closed at time.  9. Quantity of rejected RFCs.  10. Quantity of delayed requests sorted by type of requests according to SLA by services.  11. Analytics should be available on all fields of request: subject, summary, ticket number, priority, status, source, IT specialist, solution, group of specialists, department, category, tags, initiator, type of request/incident/service request/problem/change/asset in table, graphical, diagram view for current or defined period  12. Trends of registered and resolved tickets  13. Analysis of reopened requests.  15. Evaluation of performed work.  16. Exporting of all reports should be automatic and scheduled.  17. Ratings of specialists on speed of performance, users’ satisfaction, quantity of resolved requests. | Reports should be available in Microsoft excel, pdf, html, xml, txt, csv, mht, tsv in the ITSM system. |