# Requirements for Microsoft System Centre Service Manager enhancement

The left-hand column contains all the requirements that the Service Desk (Call Management) software **must** meet. The right-hand column contains all the requirements that should be met.

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| --- | --- | --- | --- |
|  | General | | Tenderer’s Response |
|  | **Mandatory** | **Related Functionality** | Against each requirement please indicate if your response is:   * Fully compliant * Compliant with development – indicating work items and the additional cost * Non-compliant |
| **1** | **Must** be *customisable* and *configurable*by suitably trained CMA IT staff (CMA IT Service Desk) | **Should** auto-complete user names (similar to in Outlook) – i.e. when you start to enter a user-id, it can list all usernames which make the text entered so far. |  |
| **2** | **Must** adhere to the ITIL principles, in particular Incident Management and Problem Management | **Should** be able to quickly see summary of an incident without having to go into each one – this would be especially useful at start of day for reviewing calls |  |
| **3** | **Must** be accessible through a true web client (ie with no client software installed on the PC, even behind the scenes) | **Should** present analyst (upon logging in to the software) with a screen notifying him/her of:   * total number of open incidents * total number of open incidents which are unassigned * total number of open incidents assigned to him/her * news of the day – any announcements regarding planned system downtime (taken from the CMDB), current major outages (as announced by the Help Desk manager), and current top problems. |  |
| **4** | **Must** be able to group incidents for related issues (e.g. 50 incidents about “no internet access ”), in a parent-child relationship, with the parent being either the identified *problem* or another *incident* :   * Must be able to close all child incidents with a single action (and all users notified with the same response) * Must be able to quickly and easily link an incident to any other incident (or a problem), either as parent or child | **Should** have a news ticker to give announcements to Service Desk staff of outages, major issues etc. |  |
| **5** | **Must** be able to add analysts to various expertise/skills groups (e.g. Exchange, Video-conferencing, Remote Working), so when an incident is logged (by any method, such as user portal, email, phone), it can automatically be routed to the relevant analyst(s), with load-balancing between groups. | **Should** have a status settings i.e. be able to see if waiting on a response from user, from 3rd party etc. *Note - may not be required as we can see details from call notes, but could be useful as a way to get an overview of where calls are being held up* |  |
| **6** |  | **Should have:** phone rota software (need to be configurable on a *daily* basis, i.e. different shifts each day – many such programs only do it on a *weekly* basis). |  |
|  | Integration | |  |
| **7** | **Must** integrate with Active Directory, so that the moment a new user is added to AD, they will also appear as a user in the Service Desk software, ensuring that the user database up-to-date. Additional points:   * We might also need to have the option to temporarily add a user manually, in case of a new user before they are created in AD.   When user is removedfrom AD, they would be removed from the list of active users in Service desk software – however, historical data would still be available (for reporting etc). | **Should** beable to integratethrough CTI (Computer Telephony Integration) with telephone systems, to allow auto-populating of caller details. |  |
| **8** | **Must** integrate with any Configuration Database (CMDB) |  |  |
| **9** | **Must** integrate with Change Management software (for generating Change Requests etc) |  |  |
|  | Automatic Alerts and Emails | |  |
| **10** | **Must** be able to automatically send email to the **end** **user** at key events, for example[[1]](#footnote-1):   * Specific time set by analyst * Incident escalated * Incident closed (email to include a link for users to provide feedback, rate customer satisfaction) |  |  |
| **11** | **Must** be able to automatically send alerts (such as email, IM or SMS) to the **analyst** and/or **call manager** at key events, for example[[2]](#footnote-2):   * Assigned to analyst * Re-assigned to different analyst * Deadline reached (e.g. 80% of time until breach) * New email received from user |  |  |
|  | Method of contact: Customer Web Portal | |  |
| **12** | **Must** be accessible on low-bandwidth, high-latency satellite links – we cannot guarantee the speed of external links | **Should** have a highly visible news ticker/current outages section for *end-users* which makes it easy to alert users to major outages. This would be modifiable by the Service Desk manager or other assigned staff. |  |
| **13** | **Must** beeasy to use for *end-users*:   * Text must be easily modifiable * Able to create/modify automatic scripts/wizards for certain types of incidents, to aid in troubleshooting (e.g. for printer errors, they will be asked certain questions first) |  |  |
| **14** | **Must** be able to have the portal uncluttered, with only a small number of options so users can use it easily. Initially, the **three** main options on the portal must be:   * log a new incident * follow up/track an existing incident. * Consult (end-user) knowledgebase |  |  |
| **15** | **Must** comply with accessibility standards (for screen readers etc) |  |  |
| **16** | **Must** authenticate via AD - so users get a personalised view of their open incidents, and history of closed incidents. Access must be restricted so they cannot see other users’ incidents.  Note: If possible, include some mechanism to allow an incident to be made visible to multiple users (e.g. user’s line manager, their team etc), or possibly be able to send a non-obvious URL to a 3rd party to have read-only access to the call notes. |  |  |
| **17** | **Must** be able to include FAQs and knowledgebase for *end-users.[[3]](#footnote-3)* |  |  |
| **18** | **Must** be possible for end-users to submit suggestions via the portal, which can then be reviewed and added to the FAQ list if appropriate. |  |  |
| **19** | **Must** be configurable to send an automatic response (email) to user when they log an incident (so they know their incident reference. Note: it must be possible to disable this, if required. |  |  |
| **20** | **Must** bepossible for end-user to track the incident, viewing all notes (except for notes specifically marked as “Private” by the analyst). |  |  |
| **21** | **Must** be possible forend-users to provide feedback/be prompted to rate their contact with the Help Desk. This should include a link to the incident details. |  |  |
|  | Method of contact: Email | |  |
| 22 |  | **Should** be possible for a user to log an incident by sending an email which will generate a new incident reference, and be added to the queue. This will ensure that all questions sent by email to the Help Desk inbox, no matter how small, will be logged and tracked, and no-one will have to manually monitor the Service Desk inbox.[[4]](#footnote-4)  The system should be able to differentiate between (1) a new incident and (2) an update to an existing incident (e.g. by auto-detecting the incident reference number in the subject line/body of the email). If the latter, it should be added as a note to the relevant incident.  Such fully-automated functionality may not be possible, but all options should be considered. |  |
|  | Access Methods for analyst | |  |
| 23 |  | **Should** be possiblefor analyststo access the **Service** Desk software through various methods such as iPad (either by docking and synchronising, or by connecting wirelessly[[5]](#footnote-5)) |  |
|  | Knowledgebase/FAQs | |  |
| **24** | **Must** bepre-populated with a selection of basic, generic information (e.g. Windows 7 troubleshooting information) and links to common information sources (e.g. Microsoft) | **Should** be an intelligent knowledgebase – as the call is logged by the analyst (if received by telephone), or by the end-user (if via portal), then it should detect key words/call categories etc and suggest possible knowledgebase articles as appropriate. These **must not** *automatically*appearin a pop-up window as they would obscure the incident log, but **may** appear as links which can be clicked for more information. |  |
| **25** | **Must** be able to restrict who can add/modify articles to the knowledgebase (e.g. all Service Desk staff, only certain Service Desk staff Apps team), dependent on the area of the knowledgebase. For example, only experts on Exchange would be able to add/modify articles on that particular subject matter. | **Should** be able to link a knowledgebase article to an incident (e.g. to indicate that all actions in that article were attempted, possibly with a method to indicate with a single-click (e.g. tick/cross) which actions were successful/unsuccessful. |  |
| **26** | **Must** have a 2-tier knowledgebase:   * Articles for Service Desk analysts/IT staff * Articles for end-users |  |  |
| **27** | **Must** havefull publicationcontrol for knowledgebase articles. New/modified articles would be routed to a person with “publisher” rights to approve/reject (to ensure both the accuracy of the information and the language/style used).  Separate “publisher” functions would exist for articles for Service Desk use, or for end-user use (one person may not necessarily cover both functions). |  |  |
| **28** | **Must** be possible for analyst to flag a knowledgebase article as potentially of use to end-users (most likely with some modification). These would then be routed to the reviewer/publisher to generate the end-user version. |  |  |
| **29** | **Must** be able to link knowledgebase articles (e.g. link the analyst version and user version of a particular item; or link 2 related items, which could appear under a “See Also” heading). |  |  |
|  | Reports | |  |
| **30** | **Must** be able to produce a relatively small number of useful, customisable reports which cover all of our reporting needs (see below) |  |  |
| **31** | **Must** be able to *easily* generate ad hoc reports, reporting on any combination of fields, including text strings (such as subject etc). |  |  |
| **32** | **Must** be able to automatically create and distribute reports to specific persons/groups (e.g. every day at 7pm) |  |  |
| **33** | **Summary of reports required:**  **Also see separate doc for list of reports**   * Breached Incidents   + Flexibility in reports so that we can exclude various categories/teams e.g. Team, Application team, as well as set dates and location.   + Show the support group managing the particular incident(s).   + Incidents about to breach (e.g. within a certain time,), including call details * Management of Volume   + Incident closure reports – need to see which incidents are being closed by *analyst*, *date* and *support group*.   + Incident category – it would be useful to select by *incident (call) category* and *date* in order to generate a report listing all calls for that category for the dates chosen.   + A comprehensive daily report showing incidents open at the start of the day, incidents closed during the day, and to which analysts/groups the incidents were allocated.   + Daily frequency distribution of calls/incidents logged – either in total, or by contact method (phone, portal, email, other). * Analysis of Trends   + Top 10 subjects (also have the ability to further sub-categorise these subjects).   + Most frequent callers (again with the ability to set start/end dates). |  |  |
|  | Customer Surveys | |  |
| **34** |  | **Should** include ability to send customer satisfaction surveys of all types:   * Annual * One-off * Ongoing (event based – e.g. for a random selection of closed incidents; for all closed incidents; for all closed incidents during certain time periods/days, as determined by the Help Desk manager)   Ongoing surveys **must** be sent within a pre-determined period (e.g. 5 minutes) of the incident being closed.  Failing this should be able to link into Survey Monkey |  |

1. Non-exhaustive list – we are open to other suggestions [↑](#footnote-ref-1)
2. See note 1 [↑](#footnote-ref-2)
3. See “Knowledgebase/FAQs” section below [↑](#footnote-ref-3)
4. The portal should be the main point of contact, but we do need to provide alternative methods of contact (email should be the second option, and telephone/direct contact would be third). [↑](#footnote-ref-4)
5. [↑](#footnote-ref-5)