PinkVERIFY™ 2011 ITSM Tool Assessment Criteria

Incident Management

Purpose: "…[R]estore normal service operation as quickly as possible and minimize the adverse impact on business operations, thus ensuring that agreed levels of service quality are maintained." (SO 4.2.1.1)
Activities: Identification, logging, categorization, prioritization, initial diagnosis, escalation, investigation and diagnosis, resolution and recovery, and closure (SO 4.2.5)

General Platform Criteria Assessment Questions

PinkVERIFY # ISS #	General Platform Criterion Assessment Question
Vendor Response: (cell expands to accommodate response)	
IM-11-G-001 1.27	ITIL® Terms Does the tool use ITIL terms and definitions? E.g. incidents rather than 'tickets'
Comment:	
IM-11-G-002 1.22	Incident Record Access Control Does the tool allow access controls to open, modify and close incidents based on pre-established conditions?
Provide an overview description of the tool's security permissions' capability, structure and authority basis (e.g.: based on role, organization, location).	
IM-11-G-003 N/A	Does the tool support designating fields as mandatory?
Provide an overview:	
IM-11-G-004 1.25	Additional Purchases Can the tool produce management reports without additional purchases such as consultancy or products?
Provide an overview:	
IM-11-G-005 1.24	Management Reports Does the tool produce reports from record detail captured? E.g., total number of incidents over any given period, total number of active, closed, first time fix, by category, by user, by CI.
Provide an overview:	
IM-11-G-006 1.26	Audit Trail Does the tool provide an audit trail of all incident record updates for: a) ID of individual recording the update b) Date and time of the action c) Type of action
Describe:	
IM-11-G-007 1.33	Incident Models Do incident models include precautions, timescales and thresholds for completion of the actions with automatic escalation?
Describe:	

PinkVERIFY # ISS #	General Platform Criterion Assessment Question
Vendor Response: (cell expands to accommodate response)	
IM-11-G-008 N/A	Does the tool provide facilities within the tool database for archiving closed records?
Describe:	

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Core Criteria Assessment Questions

PinkVERIFY # ISS #	Core Criterion Assessment Question
Vendor Response: (cell expands to accommodate response)	
IM-11-C-001 1.1	Incident Identification Can incident records be created manually?
Describe (can include screenshots):	
IM-11-C-002 1.2	Unique Reference Does the tool automatically allocate a unique reference to newly created records at the time of opening the record?
Describe (can include screenshots):	
IM-11-C-003 1.3	Date and Time Is each incident record date and time stamped when created and again each time the record is updated?
Describe (can include screenshots):	
IM-11-C-004 1.5	Contact Details Does each incident record contain a field or fields to record the contact information and call back method such as telephone or email?
Describe (can include screenshots):	
IM-11-C-005 1.4	Source of the Incident Does each incident record contain a field or fields to record the identity of the source of reporting of the incident (such as event trigger, person or group)?
Describe (can include screenshots):	
IM-11-C-006 1.11	Incident & Service Request Separation Does the tool support the capability to separate service requests from incident management?
Describe (can include screenshots):	
IM-11-C-007 1.9	Incident Categorization Does the incident record contain hierarchical category fields to record the type of incident at opening, during the call, and, separately, at closing? The categories to be set by service desk or problem management to reflect SLA requirements, clarity of categories and changes in incident mix.
Describe (can include screenshots):	
IM-11-C-008 1.13	Incident Priority Does the incident record contain a field or field(s) to assign an initial incident priority according to pre-established and manually overridden conditions? (SLA, CI type, business services impacted, level of service disruption, security breach, service request)?
Describe (can include screenshots):	

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PinkVERIFY # ISS #	Core Criterion Assessment Question
Vendor Response: (cell expands to accommodate response)	
IM-11-C-009 N/A	Does the tool have the ability to automate the calculation of priority based on defined impact and urgency factors?
Describe (can include screenshots):	
IM-11-C-010 1.16	Incident Assignment Does the incident record contain a field or field(s) to assign the incident to a support department, group or individual?
Describe (can include screenshots):	
IM-11-C-011 1.19	Incident Functional Escalation Does the tool allow an incident record to be escalated based on pre-established and manually overridden conditions? (Such as service level target, operational level target, business priority, support tier)
Describe (can include screenshots):	
IM-11-C-012 1.20	Incident Hierarchic Escalation Does the tool allow an incident record to be escalated based on pre-established (in SLA or SDP) and manually overridden conditions? (Manager notification, supplier notification, business notification)
Describe (can include screenshots):	
IM-11-C-013 1.6	Incident Symptoms Does each incident record contain a field or fields to describe the symptoms of the fault? This can include event parameters and user reported.
Describe (can include screenshots):	
IM-11-C-014 1.18	Incident Diagnosis Details Does the incident record contain a field or fields to sequentially record diagnostic activities?
Describe (can include screenshots):	
IM-11-C-015 N/A	Does the tool automate the rapid recording, classification and linking of incidents for multiple related incidents? For example: using templates or cloning or copying of an incident that is already open, using a parent-child record relationship
Describe (can include screenshots):	
IM-11-C-016 1.8	Incident Status Does the incident record contain a field or fields to record the status of the incident (such as active, waiting, closed)?
Describe (can include screenshots):	

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PinkVERIFY # ISS #	Core Criterion Assessment Question
Vendor Response: (cell expands to accommodate response)	
IM-11-C-017 1.23	Incident Closure Does the incident record contain a field or fields to record closure categorization including closure date and time?
Describe (can include screenshots):	
IM-11-C-018 1.21	Incident Resolution Do the incident records have a field or fields to record resolution information including resolution date and time?
Describe (can include screenshots):	
IM-11-C-019 1.28	Customer/user Satisfaction Does the tool enable user satisfaction measurement for incidents through surveys, follow-up or other methods for all or an agreed proportion of calls?
Describe (can include screenshots):	
IM-11-C-020 1.15	Incident Priority Can incident reports track priority changes correctly?
Describe (can include screenshots):	
IM-11-C-021 1.14	Incident Priority Can the priority be changed manually when circumstances dictate?
Describe (can include screenshots):	
IM-11-C-022 1.12	Incident Priority Are changes to an incident's priority recorded to provide an audit trail of why the priority was changed?
Describe (can include screenshots):	
IM-11-C-023 1.31	Incident Models Does the tool support incident models for particular types (categories, services, SLAs, CI types)?
Describe (can include screenshots):	
IM-11-C-024 1.32	Incident Models Do incident models list, chronologically, the steps, with dependencies, that should be taken to handle the incident?
Describe (can include screenshots):	
IM-11-C-025 1.34	Incident Models Does the tool provide necessary evidence-preservation security?
Describe (can include screenshots):	

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PinkVERIFY # ISS #	Core Criterion Assessment Question
Vendor Response: (cell expands to accommodate response)	
IM-11-C-026 1.35	Incident Tracking Can key incident attributes (status, priority, assignment to queues) only be set by the service desk?
Describe (can include screenshots):	
IM-11-C-027 1.36	Incident Tracking Have all authorized users access to incident (status, priority, log, assignment, time stamp, etc.) information?
Describe (can include screenshots):	
IM-11-C-028 1.37	Priority Servicing Does the tool enable service desk management to determine the order in which incidents are handled to ensure that incidents are dealt with in true business priority order.
Describe (can include screenshots):	
IM-11-C-029 1.38	Recording of Resolution & Recovery Does the tool support recording of actions taken and who takes them during resolution and recovery to ensure that a full history is maintained for all incidents?
Describe (can include screenshots):	

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Integration Criteria Assessment Questions

PinkVERIFY # ISS #	Integration Criterion Assessment Question
Vendor Response: (cell expands to accommodate response)	
IM-11-I-001 1.30	**Known Error** Does the tool present known errors to service desk staff and/or self-help users known errors potentially related to the incident being entered or worked on based on category, service, CI & CI type?
Describe (can include screenshots):	
IM-11-I-002 1.17	**Incident Matching** Does the tool match incident records to related problem records and known error records?
Describe (can include screenshots):	
IM-11-I-003 1.29	**Problem Linking** Does the tool allow linking of an incident to one or more related problem records?
Describe (can include screenshots):	
IM-11-I-004 1.10	**Incident or Service Request** Is there the ability to open a service request from an incident record and to link the service request to that incident record?
Describe (can include screenshots):	
IM-11-I-005 1.7	**Configuration Item Details** Does the incident record contain a field or fields to relate a CI record(s) to the incident?
Describe (can include screenshots):	
IM-11-I-006 N/A	Does the tool integrate with Configuration Management Systems or CMDBs to enable the Service Desk to identify, investigate and diagnose incidents?
Describe (can include screenshots):	
IM-11-I-007 N/A	Does the tool integrate with Change Management to enable the rapid opening of a Request for Change Record (RFC) from an Incident Record; and to enable the creation and maintenance of the linked relationships between the Incident Record(s) and associated RFCs?
Describe (can include screenshots):	
IM-11-I-008 N/A	Does the tool enable the creation and maintenance of "caused by" linked relationships between Incident Record(s) and associated RFCs? For example: recording incidents which are caused by changes
Describe (can include screenshots):	

PinkVERIFY #	Integration Criterion Assessment Question
ISS #	
Vendor Response: (cell expands to accommodate response)	
IM-11-I-009 N/A	Does the tool integrate with Service Level Management to monitor and track incident response time and resolution time based on priority and / or service levels?
Describe (can include screenshots):	