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FINANCE	General Criteria
FM-11-G-001	Does the tool use ITIL 2011 Edition process terms and align to ITIL 2011 Edition workflows and process integrations? ---
FM-11-G-002	Does the tool have security controls in place to allow only authorized staff and users to view, open, modify, authorize and close records based on their role? ---
FM-11-G-003	Does the tool support designating fields as mandatory? ---
FM-11-G-004	Does the tool provide out-of-the-box reports and facilitate flexible (ad hoc) report generation? ---
FM-11-G-005	Does the tool facilitate the production of management reports from historical records? ---
FM-11-G-006	Does the tool provide an audit trail for record information and updates? For example: IDs of individuals or groups opening, updating and closing records; dates and times of status and activities updates, types of activities ---
FM-11-G-007	Does the tool automate notification and escalation to keep IT and users informed of potential issues or progress? ---
FM-11-G-008	Does the tool provide facilities within the tool database for archiving closed records? ---

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FINANCE	Core Criteria
FM-11-C-001	Does the tool have the ability to do detailed price/cost modeling, to determine the cost unit structures for each Service? ---
FM-11-C-002	Does the tool facilitate linking Services to General Ledger accounts or costs centers? For example: support for breaking down and allocating a service cost / price to multiple general ledger or cost center codes. ---
FM-11-C-003	Does the tool support different cost models based on varying service levels for the services published in the Service Catalog? For example: Gold, Silver, Bronze ---
FM-11-C-004	Does the tool have the ability to distinguish and differentiate between Service Cost and Service Price? For example: a view or fields for service price based on demand metrics, and a view or fields for the actual cost to provide the service ---
FM-11-C-005	Does the tool facilitate tracking and monitoring cost details? For example: Hardware purchase, hardware maintenance, software purchase, software licenses, facility including utilities, personnel ---
FM-11-C-006	Does the tool facilitate the ability to categorize the cost data? For example: Capital or Operational, Direct or Indirect, Fixed or Variable, Unit Cost ---
FM-11-C-007	Does the tool support a hierarchical service-based costing model? For example: the roll-up cost of a customer-facing service (e.g. email) with the breakdown of the costs for the systems (e.g. MS Exchange, Lotus Notes) and the associated supporting IT infrastructure (e.g. servers, databases, network, storage) and applications ---

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FINANCE	Core Criteria
FM-11-C-008	Does the tool enable the allocation of service costs to one or more business units based on related service consumption? For example: distributed, departmental or geographical service consumption in relation to the business unit. ---
FM-11-C-009	Does the tool support business planning in support of the annual budgeting processes? ---
FM-11-C-010	Does the tool facilitate managing a rolling plan? For example: a 12-month rolling view of service costs as well as defined 12-month reporting view ---
FM-11-C-011	Does the tool have the ability to support a variable cost model? For example: metered usage charges ---
FM-11-C-012	Does the tool have the ability to do complex analysis (VCD Variable Cost Dynamics) of potential business and usage changes to provide cost forecasts? For example: scenario modeling to show cost impact of adding one or more user licenses or storage devices ---
FM-11-C-013	Does the tool facilitate the set up and distribution of notional charging? ---
FM-11-C-014	Does the tool facilitate the set up and distribution of direct plus charging? ---
FM-11-C-015	Does the tool have the ability to set up and distribute fixed price charging? ---

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FINANCE	Core Criteria
FM-11-C-016	Does the tool have the ability to support pre-project Return on Investment (ROI) calculation techniques? For example: capital budgeting techniques such as Net Present Value, Internal Rate of Return, etc. ---
FM-11-C-017	Does the tool have the ability to support post-project Return on Investment (ROI) calculations over a defined time period? ---

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FINANCE	Integration Criteria
FM-11-I-001	Does the tool provide the ability to pull from financial attributes recorded and managed in the Configuration Management System - CMDB to support service-based costing objectives? ---
FM-11-I-002	Does the tool provide an interface for IT Business Relationship Managers (Service Level Managers) to monitor and detect potential issues with fluctuations in the cost to provide a service? For example: a fluctuation in cost could be the result of actual consumption not matching planned consumption ---
FM-11-I-003	Does the tool integrate with Request Fulfillment, Change Management and procurement systems to support the routing of requests and procurement activities to cost center approvers? ---
FM-11-I-004	Does the tool integrate with the General Ledger System, HR Time Tracking System, and other internal tools for tracking, managing and reporting on IT's cost to support and provide services? For example: tracking current and forecasted consumption and cost to provide service ---