34.1.4 Intranet Applications Operations Tools

Contents:

1.0 Purpose

The purpose of this document is to describe the help desk software and the rationale behind selecting it as the short term solution for capturing and managing user requests within the Applications Management (AM) group.

2.0 Introduction

The following table summarizes tools that will initially be used to support the SFANet Application Management group.

Tool	Function
MS Access based Request Tracking Database	❑ Service Agreement Measurement and Reporting ❑ Problem Management ❑ Change Management
MS Excel Spreadsheet	❑ User and Stakeholder Contact Management ❑ Capacity Planning

Note: For User and Stakeholder Contract Management and Capacity Planning no customized tool is necessary in the short term. A simple MS Excel spreadsheet will be used by the AM group to meet this requirement.

The remainder of this document describes the MS Access Request Tracking Database. Appendices A and B document the requirements that were used in the selection of the Request Tracking Database and the selection criteria that was used in the evaluation.

3.0 AM Request Tracking Database

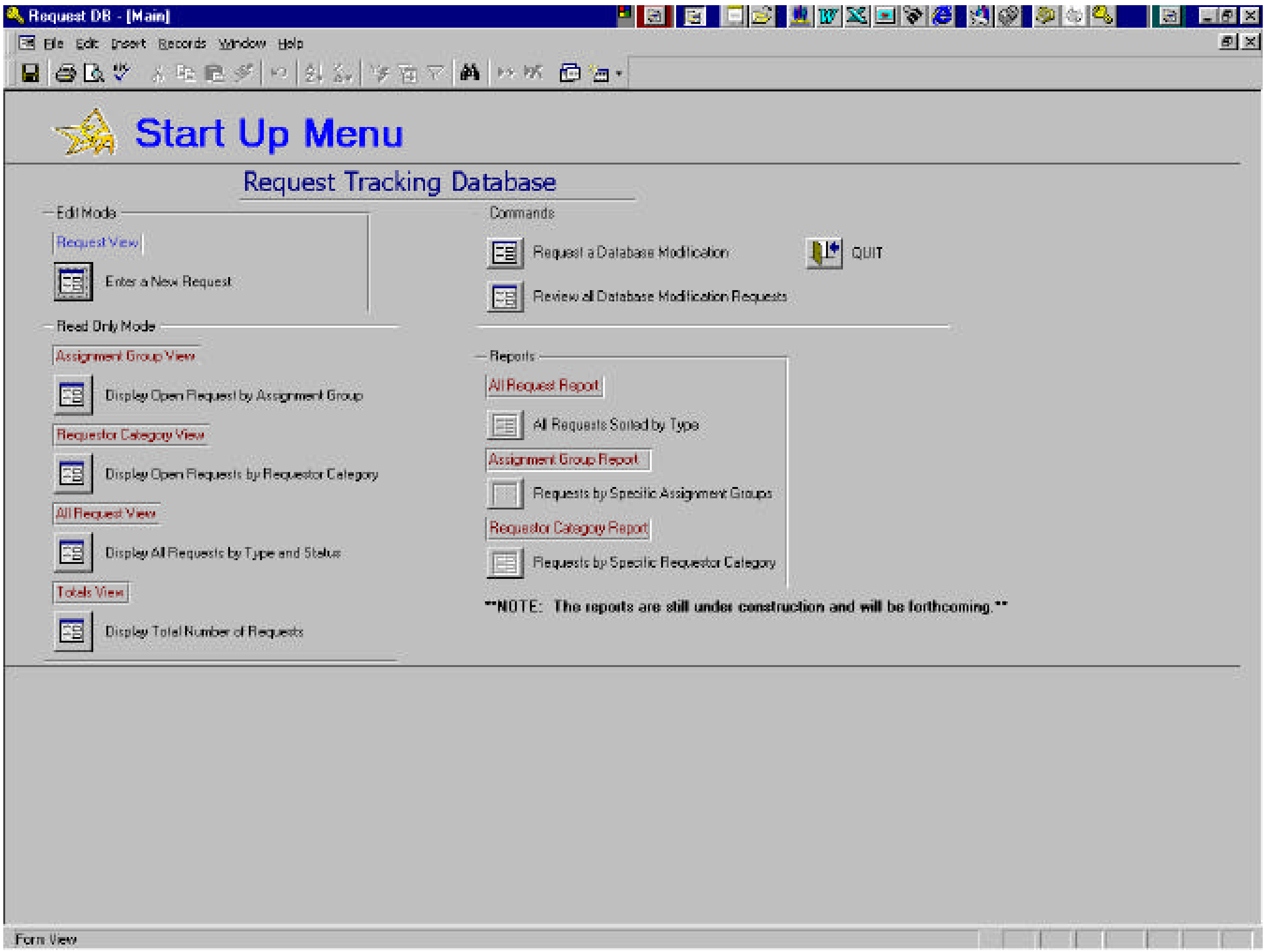
The Request Management processes (see 34.1.3 Intranet Applications Operations Processes) define the steps to take a user request from an initial state of awareness to a final state of resolution. This process is challenging without the use of a specially designed software tool to track and manage user requests. This tool is commonly referred to as help desk software. The remainder of this document will describe the help desk software that will be used by the AM group and the rationale for selecting it as the short term tool of choice.

The help desk software that best meets the needs of the AM group is an MS Access database designed specifically for help desks and customized for SFA. The AM Request Tracking Database, as it is called, has all the desired **functionality** (see requirements) for **day-one readiness** and an extremely **affordable lifecycle** cost. Also, since MS Access is a skill abundant within the AM group, the database can **continually improve** as the AM group evolves without having to contract external help.

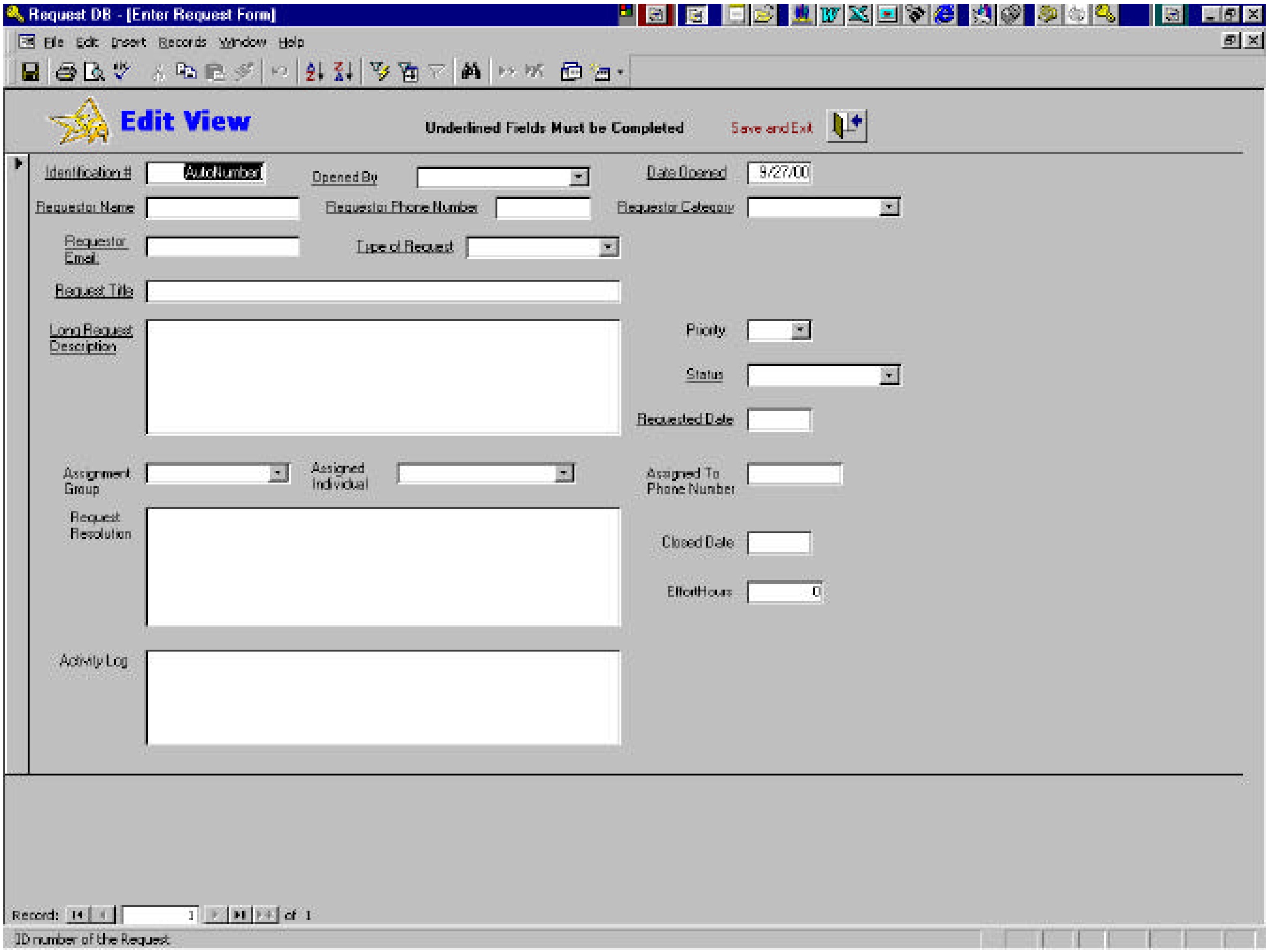
By installing MS Access on each team member's PC and storing the database on a shared drive to which both Tier I and Tier II help desks have access, all the required help desk functionality can be provided to both teams allowing seamless transfer of user requests.

3.1 Functionality

3.1.1 Start Up Menu Screen Shot



3.1.2 Edit View Screen Shot



3.1.3 The Database Record

Listed below are some of the fields (data) associated with a request record. Fields that are marked as “Required” need to be filled in when **creating a new request**.

Table 1: Database Record and Required Fields for Creating a New Request

Field	Explanation	Required?
ID	Primary key - ID number of the request	YES
Date Opened	Date request was made	YES
Opened By	The name of the person opening the record	YES
Requestor Name	The name of the person making the request	YES
Requestor Phone Number	The phone number of the person placing the request	YES

Field	Explanation	Required?
Requestor Email	The email address of the person placing the request	YES
Requestor Category	The Requestor's Business Unit or Group	YES
Title	Short identifier of request	YES
Request Description	Brief but comprehensive description of the request	YES
Status	Describes if the request is Open, Closed, or Canceled	YES
Requested Date	The date the requestor has asked for the request to be completed	YES
Priority	Priority of the request (1,2,3)	NO
Type of Request	Choose the type of request from the drop down list. Is it a New Initiative, Ad Hoc or Other request.	YES
Resolution	How the request was completed	NO
Effort Hours	How many hours did it take to complete the request	NO
Closed Date	Date that the request is closed	NO
Assignment Group	Group that has been assigned the request	NO
Assigned To	Individual that has been assigned to work the request	NO
Assigned To Phone Number	The phone number of the individual assigned to the request	NO
Assigned To Email	The email address of the person resolving the request	NO
Activity Log	Time-stamped record of activities	NO

Listed below are some of the “required” fields that need to be filled in before **closing a request**.

Table 2: Database Record and Required Fields Before Closing a Request

Field	Explanation	Required?
ID	Primary key - ID number of the request	YES
Date Opened	Date request was made	YES
Opened By	The name of the person opening the record	YES
Requestor Name	The name of the person making the request	YES
Requestor Phone Number	The phone number of the person placing the request	YES
Requestor Email	The email address of the person placing the request	YES
Requestor Category	The Requestor's Business Unit or Group	YES
Title	Short identifier of request	YES
Request Description	Brief but comprehensive description of the request	YES
Status	Describes if the request is Open, Closed, or Canceled	YES
Requested Date	The date the requestor has asked for the request to be completed	YES
Priority	Priority of the request (1,2,3)	NO
Type of Request	Choose the type of request from the drop down list. Is it a New Initiative, Ad Hoc or Other request.	YES
Resolution	How the request was completed	YES
Effort Hours	How many hours did it take to complete the request	NO
Closed Date	Date that the request is closed	YES
Assignment Group	Group that has been assigned the request	YES
Assigned To	Individual that has been assigned to work the request	YES
Assigned To Phone Number	The phone number of the individual assigned to the request	NO
Assigned To Email	The email address of the person resolving the request	NO
Activity Log	Time-stamped record of activities	YES

4.0 Known Limitations and Workarounds

MS Access has a limit to the number of concurrent users (people accessing data at the same time) that it supports. The database will support ten or less concurrent users.

AM Request Tracking Database is not currently linked to other help desk applications within the SFA environment. Through the ODBC standard protocol that Access uses the capability exists to seamlessly transfer, report on and update information across applications should the AM group chose to incorporate it at any time. In the short term, the need for this kind of capability can be met with a manual hand off procedure via phone or e-mail.

5.0 Process Integration

The Request Tracking Database is designed to integrate easily with the Request Management process group. This process group contains the processes associated with logging, validating, clarifying, classifying, controlling changes to, tracking, and closing requests for service. Across this process group, the Request Tracking Database will enable Customer Care personnel within AM to track requests and continually keep users informed throughout the process.

Each Customer Care Representative will access the Request Tracking Database from the ED-LAN using a local copy of MS Access. In addition, each AM group member will have access to the database to receive and track all request based work assigned to him or her. It will be the responsibility of the Customer Care function to monitor and reprioritize requests and resources as appropriate to ensure that the work is completed in compliance with defined service levels.

Appendix A - Requirements

1.0 Purpose

The purpose of this Appendix is to describe the requirements for the Request Management tool. This tool will be used to capture all incoming requests to the help desk and will allow for the tracking of the resolutions.

2.0 Requirements

2.1 The Request Record

The Request Management Tool will be used to log and track requests until they are resolved. To accomplish this, the following fields will need to be included in the Request Management Tool.

Field	**Explanation**
Request ID	Primary key - ID number of the request
Date and Time Opened	Date and Time request was made
Opened By	The name of the person opening the record
Requestor Name	The name of the person making the request
Requestor Phone Number	The phone number of the person placing the request
Requestor Email	The email address of the person placing the request
Requestor Category	The Requestor's Business Unit or Group
Title	Short identifier of request
Request Description	Brief but comprehensive description of the request
Status	Describes if the request is Open, Closed, or Canceled
Requested Date	The date the requestor has asked for the request to be completed
Priority	Priority of the request (1,2,3)
Type of Request	Choose the type of request from the drop down list. Is it a Bug Fix, Enhancement/Update, Ad Hoc, or Query request?
Resolution	How the request was completed
Effort Hours (Estimated & Actual)	How many hours did it take to complete the request
Closed Date (Time)	Date that the request is closed
Assignment Group	Group that has been assigned the request
Assigned To	Individual that has been assigned to work the request
Assigned To Phone Number	The phone number of the individual assigned to the request
Assigned To Email	The email address of the person resolving the request
Activity Log	Time-stamped record of activities
Comments	Text area to store miscellaneous comments.

Table 3 Request Record

2.2 Other Requirements

1. The Request Management Tool is in a Graphical Format that is easy to learn and use.
2. There should be a main menu for the user to navigate from. Menu option choices include: Create New Request Entry; Retrieve Request; View/Print Request Report.
3. There should be a "Help" function for the user to reference how the tool works.
4. The Request Management Tool will be accessed with an Andersen laptop/desktop PC.
5. The Request Management Tool will generate reports based on those outlined in the Deliverable 34.1.5 Metrics Based Service Targets.

3.0 Assumptions

1. Scalability: It is not yet known if and how this tool will need to communicate with other request management tools from the other applications. No connectivity to other help desks is needed in the short term (3-6 months).
2. Cost: There has been no cost allocated to the Request Management Tool. The goal is to keep costs at a minimum. Costs include the implementation fees, training fees, and maintenance fees. In the event that the tool selected is one that is already in place for another application, then the costs would entail obtaining licenses of the tool for installation on individual machines, ensuring connectivity and training.

Appendix B – HD Tool Comparison Matrix

Tool Name:	**Request Tracking Database (MS Access)**	**CSCC Tool (Lotus Notes)**	**Advanced Helpdesk (AHD)**	**Siebel**	**Remedy**
Description	MS Access is a readily available application and is used to run the database. This database will be able to track all incoming requests, as well as their resolutions.	Lotus Notes is part of a database management suite. This is an easy to use database format, and is currently being used by the Schools Channel.	AHD is a fully Web-enabled enterprise support solution that enables corporate customers to help reduce support costs, improve service levels, and boost productivity of both technical staffs and end users.	Siebel provides a comprehensive family of front office solutions with functionality in every category of sales marketing and customer service market segments. Currently used by Ombudsman.	Remedy is recommended as a preferred tool for problem management, change management, service management, asset management, and configuration management.
Cost					
Initial Cost	$0	$0	~$3,000 per license	$1,350 per user	$2,000 server + five user pack. Additional five user packs for $3,000
Lifecycle Cost	minimal	moderate	minimal	Maintenance Charges based on licenses.	Maintenance Charges based on licenses.
Day One Readiness					
Availability	Y	Y	Y	N	N
Customization	4 hours	80 + hours	moderate	extensive	extensive
Functionality					
Field Requirements:					
ID	Y	Y	Y	Y	Y
Date Opened	Y	Y	Y	Y	Y
Opened By	Y	Y	Y	Y	Y
Requestor Name	Y	Y	Y	Y	Y
Requestor Phone Number	Y	N	Y	Y	Y
Requestor Email	Y	N	Y	Y	Y
Requestor Category	Y	N	Y	Y	Y
Title	Y	Y	Y	Y	Y
Request Description	Y	Y	Y	Y	Y
Status	Y	Y	Y	Y	Y
Requested Date	Y	Y	Y	Y	Y
Priority	Y	N	Y	Y	Y
Type of Request	Y	N	Y	Y	Y
Resolution	Y	Y	Y	Y	Y
Effort Hours	Y	N	Y	Y	Y
Closed Date	Y	Y	Y	Y	Y
Assignment Group	Y	N	Y	Y	Y

Tool Name:	**Request Tracking Database (MS Access)**	**CSCC Tool (Lotus Notes)**	**Advanced Helpdesk (AHD)**	**Siebel**	**Remedy**
Assigned Individual	Y	Y	Y	Y	Y
Assigned To Phone Number	Y	Y	Y	Y	Y
Assigned to Email	Y	Y	Y	Y	Y
Activity Log	Y	Y	Y	Y	Y
Improbability:					
Team Member(s) knowledgeable of platform (enhancement purposes)	Y	N	N	N	N
Custom reporting capabilities	Y	Y	Y	Y	Y
Connectivity (If required at a later time)	ODBC	Lotus Notes	ODBC	Yes	Yes