

Incident Management

1. Does the tool facilitate the creation, modification, resolution, and closure of Incident records?
 Comments: Yes. The tool facilitates; the creation of an incident with unique Service Record #'s, modification of the incident with permanent edit logs, resolution with comments, and closure with a close date and closure type.

ITG's CENTRE Service Record Incident Screen

2. Does the tool support the classification of an Incident by IT services as well as technology failure?
 Comments: Yes. IT Services is identified by the 'Catalog Service' type and, technology failure is identified via the 'Service Record' open and close type selection boxes.

Incident Management

3. Does the tool facilitate the ability to automate Incident models and workflow based on record classification? For example, automated prioritization, assignment, and escalation of Incidents based on the record classification?

Comments: Yes. Prioritization is based upon Urgency and Impact values which are automatically populated to the incident when a CI is matched. These values may be modified on the incident or entered to the incident if no CI exists. The Priority value is automatically calculated from Urgency and Impact values. Incident assignment is automatically limited to technical managers assigned to the specified contract. Escalation of incidents may be achieved using the 'Notification Events' or 'Workflow' modules. These modules can evaluate the record classification and route email alerts to users, stakeholders, and any other desired individuals or groups.

The image shows two screenshots from a service management system. The top screenshot is titled 'VIEW SERVICE RECORD' and displays a form for a service record with ID 213348. Key fields include Contract # (8068-000), Priority (1 - Low), and Urgency (1 - Low). A table on the right shows a timeline of events: Opened, Contacted, Dispatched, Confirmed, On-Site, Resolution, and Closed. The bottom screenshot is titled 'VIEW CONFIGUR' and shows configuration details for the contract, including POC information, item type (PC), model (GX9010), manufacturer (DELL), and urgency/impact/priority settings (all set to 1 - Low). Red circles and arrows highlight the 'Priority' field in the service record and the 'Urgency', 'Impact', and 'Priority' dropdowns in the configuration screen, indicating their relationship.

Notify and Workflow Modules

The image shows a 'SYSTEM CONFIGURATION' menu with several options: Alerts, User Groups, Other Emails, Users, User Hierarchy, Workflows, and Notification Events. The 'Workflows' and 'Notification Events' options are circled in red, indicating they are the focus of the discussion.

Incident Management

4. Does the tool support the input of free text for the recording of Incident descriptions and resolution activities?

Comments: **Yes.** The Incident Screen has four (4) free text entry fields.

The screenshot shows an incident management form with the following sections:

- Description:** POC: Edgar, POC Primary Phone: 317, NETWORK: The Customer is needing a new Ethernet Cable. The Customer is needing a new Ethernet Cable as the one he
- Resolution:** Shird, Joan X 12/18/2013 09:55 am 00:00:22 Close. New cable pull to be arranged by Admin office.
- Comments:** Redirect Service Desk Ticket, REDIRECT to IT - HITS REGION 05, 12/17/13 12:50, Tech checked out lan drop, it is bad coming from the wall
- Other fields:** Account/PO#, Payment by, View Account/PO#, Amount, Sub Labor Hours, Sub Labor Cost, Estimated Labor Cost, FE Labor Hours, Estimated Travel Cost, CC Type, Invoice Date, Expiration Date, Invoice #, Invoice Received, Cost of Parts, SLA Penalty Cost, Shipping Cost.

Four arrows point to the following text entry fields:

- POC Primary Phone: 317
- Resolution: Shird, Joan X 12/18/2013 09:55 am 00:00:22 Close
- Comments: Redirect Service Desk Ticket
- Comments: Tech checked out lan drop, it is bad coming from the wall

5. During Incident registration, are time, date and Incident number fields mandatory?

Comments: **Yes.** A unique Service Record Incident number and 'Opened Date/Time' are automatically generated and applied to the incident.

The screenshot shows a 'VIEW SERVICE RECORD' form with the following details:

- Workflow Status:** [Not Initiated]
- Service Record #:** 213348 (circled)
- Contract #:** 8068-000
- Service Record Category:** Request
- Catalog Service:** General Support (Service Call Management) - No Price Option - Confirmed
- Status:** Closed
- Priority:** 1 - Low
- QA Complete:** NO
- Classification:** IMAC
- Time Zone:** 0
- Days:** 2
- Reference Incident #:** (empty)
- Reference Request #:** (empty)
- Reference Event #:** (empty)
- Customer Reference #:** R1445225
- Sub Reference #:** (empty)
- Customer Reference #:** (empty)
- Lookup Engineer:** Select
- Engineer:** (empty)
- Opened By:** Munoz, Mark
- Opened:** 12 16 2013 12 30 (circled)
- Contacted:** 12 16 2013 12 48
- Dispatched:** 12 17 2013 08 44

6. Does the tool restrict the ability to open, modify and close Incident records based on role?

Comment: **Yes.** From: 'ITG CENTRE Introduction' Document Control # 180-v2

- System Administrator attributes. The System Administrator attributes allow control to be exercised over the Users of "ITG CENTRE" by assigning permissions, passwords, and controlling the Users' ability to see and manipulate data within the system.**

7. Does the tool automate the rapid classification and recording of Incidents? For example, the use of Incident templates or rapid cloning/copying of an Incident that is already open.

Comments: **Yes.** CENTRE's Incident Management 'Auto-Population' feature assists the user in the creation of an Incident record. By entering all or part of the POC, contract, or item information, CENTRE's 'Get' auto-populate features assist the user in incident creation by automatically populating user and CI information into the Incident record.

Auto Populate features 'Get Contract', 'Get POC', or 'Get Item'

The screenshot shows a 'NEW SERVICE RECORD' form with the following details:

- Buttons:** Get Contract | Get POC | Get Item | Get Problem | Help (circled)
- Header:** NEW SERVICE RECORD
- Text:** The mandatory editing fields are indicated with an asterisk *
- Fields:** Service Record #: *Contract #: *Service Record Category: *Catalog Service:

Incident Management

Incidents may be 'Cloned' by selecting the 'New Ref Incident' Tab below the displayed incident.



Cloned Incident from Incident # 125090

NEW

*The mandatory editing fields are indicated with an asterisk **

Service Record #: *Contract #: *Service Record

Incident

Reference Incident #: Reference Request #: Reference Event #: Customer Reference #:

8. Does the tool facilitate the association of Incident records to user and customer data?

Comments: Yes. CENTRE facilitates this by;

- 1- Storing user identities (name, address, phone#, CI information, Agency name, etc) with the incident.
- 2- Identifying the customer by including and validating the customer contract number on the incident.

VIEW SERVICE RECORD

Workflow Status [Not Initiated]

Service Record #: 213348 Contract #: 8068-000 Service Record Category: Request Catalog Service: General Support (Service Call Management)

Status: Closed Priority: 1 - Low QA Complete: NO Classification: IMAC

Reference Incident #: Reference Request #: Reference Event #:

POC: Edgar POC Phone: 317- POC Extension: POC @: Edgar Alternate POC: Alternate POC Phone: Alternate POC Extension: Caller: HUD

Lookup Engine Engine Opened Lookup TA TA Lookup SM

9. Does the tool enable priority, impact, and urgency indicators to be allocated to Incident records?

Comments: Yes. The CI's Priority, Urgency and Impact values are automatically applied to the Incident and are modifiable. If no CI exists, the Urgency and Impact values may be manually entered.

VIEW SERVICE RECORD

Workflow Status [Not Initiated]

Service Record #: 213348 Contract #: 8068-000 Service Record Category: Request Catalog Service: General Support (Service Call Management) - No Price Option - Confirmed

Status: Closed Priority: 1 - Low QA Complete: NO Classification: IMAC Time Zone: 0 Days: 2

Reference Incident #: Reference Request #: Reference Event #: Customer Reference #: R1445225 Sub Reference #:

POC: Edgar POC Phone: 317- POC Extension: POC @: Edgar Alternate POC: Alternate POC Phone: Alternate POC Extension: Caller: HUD

Lookup Engineer: Select Engine: Select Opened By: Munoz, Mark Opened: 12 16 2013 12

Lookup TAMI: Select TAMI: Seager, Terence P. Opened: 12 17 2013 08

Lookup SME: Select SME: Ceely, George B. Confirmed: 12 18 2013 09

BDM: Ceely, George B. Resolution: 12 18 2013 09

Sub: Bell Technoligx Closed: 12 18 2013 09

Sub Rating: 4 Part Order #: 0 Shipped Date:

Urgency: 1 - Low Impact: 1 - Low

SLA Code: S2 BS 24 Service Record Type: IMAC

SLA Exception: Exception Pending Action: Select

Incident Management

The Priority is the weighted values of the Urgency and Impact.

Impact	Urgency	Priority
1	1	1
1	2	2
1	3	2
1	4	3
1	5	3
2	1	2
2	2	2
2	3	3

10. Does the tool facilitate the monitoring and tracking of Incidents based on Service Level Agreements and Operational Level Agreements? For example, automated escalations based on targets for response or resolution not being met.

Comments: Yes. There are four levels of SLA thresholds. The hierarchal sequence is as follows from lowest to highest:

- 1- The Contract has an automatic default threshold for SLA events.
- 2- The Item Type SLA supersedes the above SLA's.
- 3- The SLA Code supersedes the above SLA's.
- 4- The CI SLA supersedes the above SLA's.

All SLA breach targets (which are identified by percentage of time lapsed to the SLA) are automatically routed to appropriate personnel.

Contract Screen with Lapse Percentage Values

VIEW CONTRACT

Contract #: 8068-000
 CO: LSI
 CO Phone: 301- Extension:
 Customer Name: HUD HITS II
 COTR: Rod
 COTR Phone: 301- Extension:
 COTR Email: rod.
 BDM: Ceely, George B.
 Customer Contract #:
 Contract Modifications:
 TAM: David Humes
 Last Modified By: Ceely, George B.

PPM Rate: 115
 OPPM Rate: 145
 Sunday Rate: 0
 Minimum: 0
 Billable: No
 Travel: No
 Taxable: No
 Non-Revenue: No
 CI Change Request Required: No
 QA: Yes

Start Date: 08 - 01 - 2005
 Expiration Date: 07 - 31 - 2015
 Close Out Date: 07 - 31 - 2015
 Days Extended:
 PPM Hours: 11
 Days of Service: M-F
 PPM Hours Start: 07 - 00
 PPM Hours End: 18 - 00

CI Import Designated Contract: None
 Update Acceptance Date
 External Data
 Use PPM Hours for SLA
 Include Saturday in SLA
 Include Sunday in SLA
 Include Holiday in SLA

SLA Metric	Value	Personnel	% Time Lapse
Response SLA Hours	4	Email TAM @	65 % Time Lapse
On-Site SLA Hours	0	Email TAM @	65 % Time Lapse
Repair SLA Hours	32	Email TAM @	65 % Time Lapse
		Email BDM @	90 % Time Lapse

Send email notification when SLA values are not met by the % Time Lapsed specified below.

11. Does the tool facilitate flexible report generation and the production of management reports from historical Incident records?

Comments: Yes. The Reports tab contains numerous management reports. Many of these reports are customizable via filtering selections once executed.

MEASUREMENT & ANALYSIS

Reports marked with a (Y) will only retrieve data from year 2013 and beyond. You may change this to access data prior to the current year.

Parts

- Parts Owed by Field Engineers > 7 Days - (Y)
- All Parts Owed > 7 Days - (Y)
- Parts Owed by Subcontractors > 7 Days - (Y)

Activity Reports

- Activity Reports Owed by Subcontractors > 7 Days - (Y)

Service Records

- Find Service Record Percentage (Performance Measurements)
- Item Type Service Record Summary By Contract and Item Type (Project Performance Measurements)
- TAM Open Service Records Not Dispatched
- TAM Open Service Records Dispatched w/Parts Shipped
- Service Records and Service Record Complaints By Region
- Service Record Performance By Serial Number
- Service Record Type by Contract
- Find Service Record Percentage By Hour (Performance Measurements)
- Open Service Records By Contract
- TAM Open Service Records Dispatched
- Company Score Card (Project Performance Measurements)
- Item Types in Service Records Vs Contract Item List
- SLA Performance For Each Contract
- Average Costs per Item Type For Each Contract
- Project Financials

Apart from the available reports on the CENTRE reports screen, users have access to the Ad-hoc reporting system. A user is able to select desired data tables to join, filter, sort, save, and run reports from historical incident records.

Incident Management

Ad-Hoc Entry Screen

>> Tables Joins Columns Aggregates Filters Group By Sorting Options Run Report

TABLE NAME	SELECTED TABLE
AccessType ActionItem ActionType ActivityReport AdhocReportLog ADMC2FreightAmount ADMC2ImportErrorLog ADMC2ImportItem ADMC2InvoiceDetail ADMC2InvoiceHeader ADMC2ItemList ADMC2QuoteDetail ADMC2QuoteHeader	

12. Does the tool provide a secure historical audit log of all Incident updates and resolution activities?

Comments: Yes. Incident historical information is captured in the Incident log and is un-modifiable.

SERVICE RECORD DETAIL

Contract #: 8068-000
Service Record #: 106278
Reference #:
Customer #: 1167013

Classification: None
Billable: No
TAM: Gantt, Gregory L.

Status: Closed
Engineer:
Sub: BancTec (MMC)

Manufacturer: DELL
Model: D610
Serial #: ITG106278
New Serial #:
Description: Laptop

POC: Hugh HUD
 77 West Jackson Boulevard
 Chicago, IL - 60604
 United States

Alt POC: -

Problem: LAPTOP: Customer unable to get laptop to boot.
 Description Incident Priority
 LAPTOP: Customer unable to get laptop to boot. Customer states it has the power plugged in. Had customer hold in on the power button. Customer is at home. Customer travels extensively. Please call customer and make arrangements. *no configuration
 Cell phone: 31
 Dell Latitude D610

Fix: Update Site Ticket
 #BF-TC 06/12/07 11:00
 #BF-SR 06/12/07 11:00
 The FE reseated all cables associated to the laptop, reset the system and it booted correctly. The FE also cleaned off the laptop while he was on site.
 Entered on: 6/12/2007 2:04:44 PM by:Gantt, Gregory L.

Opened: 6/11/2007 - 09:20
Dispatch: 6/11/2007 - 10:15
Response: 6/12/2007 - 10:00

Next ETA: -
Last Status: 6/18/2007 2:28:12 PM
Closed: 6/12/2007 - 11:00

Orders:
Shipped:

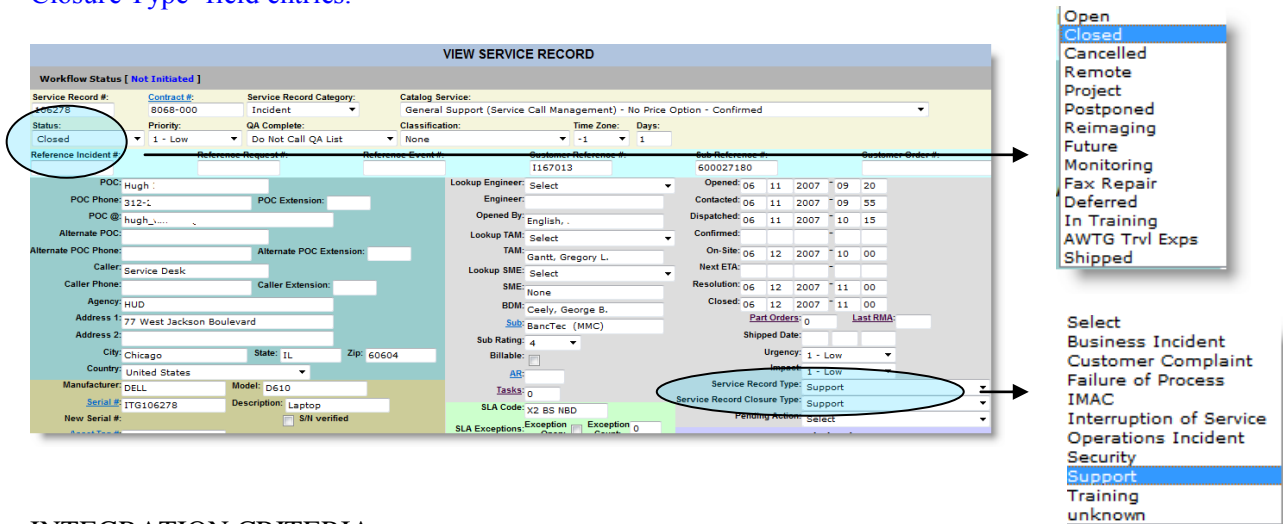
Comments: #BF-AK 06/11/07 09:55
 Spoke to POC and I will dispatch FE to diagnose problem with laptop.
 Entered on: 6/11/2007 10:08:43 AM by:Gantt, Gregory L.

DATE	USER	LOG ENTRY	INVOICE
6/18/2007 2:28:13 PM	Boykin, Wanda L.	6/18/2007 2:28:12 PM - QA Complete changed to Do Not Call QA List ->POC name listed on the Do Not Call QA List.	
6/12/2007 2:09:48 PM	Gantt, Gregory L.	To :calloperators@itgonline.com From :Gantt, Gregory L. Sent:6/12/2007 2:09:45 PM Subject :ServiceCall #106278 Message :Update Site Ticket #BF-TC 06/12/07 11:00	

Incident Management

13. Does the tool facilitate Incident closures by utilizing configurable Incident closure categorization codes?

Comments: **Yes.** Customizable closure codes are available within the 'Status' and 'Incident Closure Type' field entries.



INTEGRATION CRITERIA

Terminology

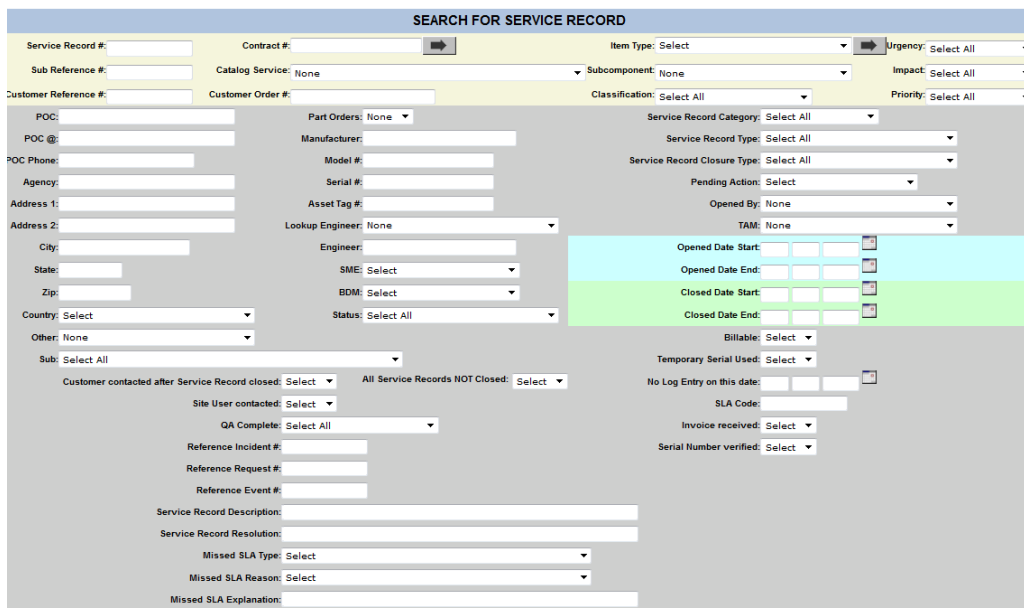
1. Does the tool's use of terms and definitions align with ITIL terms and definitions?

Comments: **Yes.** CENTRE was aligned with ITIL terms and definitions.

Problem Management

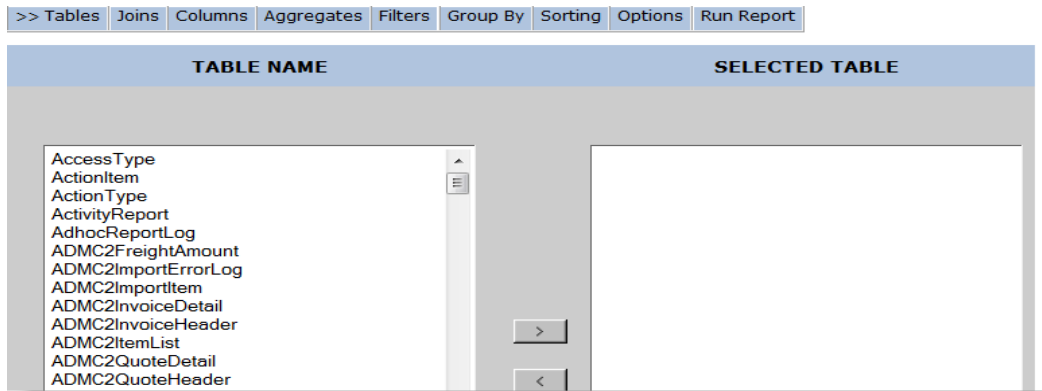
1. Does the tool facilitate Incident matching and trending in support of Problem identification?

Comments: **Yes.** A report facilitating Incident matching can be achieved via the search Incident screen. The search can be conducted singularly or in any combination of search fields. For example, a search may be conducted on the Item or Incident Type.



Incident Management

Additional incident matching may be performed using the Ad-hoc reporting system.



Another means to retrieve incident matches is via the Potential Problem Management System (PPMS). Using this system, one can identify possible trends by pulling data on specific categorizations within the incident records.

Using this system to match incidents, a pre-written ad-hoc report is executed on user designed categories (such as server power supplies, equipment model, incident closure type, or any other incident fields), and is automatically executed as a background process. The PPMS system is designed to automatically send a report to the user or group of users when an established threshold of incidents which match your criteria has been breached.

PPMS Scan Request

The screenshot displays the 'VIEW POTENTIAL PROBLEM SPECIFICATION SCAN REQUEST' form. The form contains the following fields and values:

- Scan Request Name: HP Printer Fuser Failures
- Description: This scan is to identify high fuser failures.
- Scan Request Query: HP Fuser Replacement
- Priority Level: 4
- Problem Status: Unknown Issue
- Scan Status: Inactive (Note: This scan request will only be executed if Active)
- Scan Number of Days Prior to Current Date: 90
- Scan on Date Column: SrvcCall.DateOpened
- Scan Frequency Type: Days
- Scan Frequency Value: 1
- Number of Matches: 3
- Problem Assigned to User: Vespe, Robert R.
- Alert Notification Email Address: robert.vespe@itgonline.com
- Enable Email Notification: Yes
- Select Query: Select SrvcCall.SrvcCallID as [ServiceRecordID],SrvcCall.DateClosed as [DateClosed],SrvcCall.MfrName as [ManufacturerName],SrvcCall.Model as [Model],SrvcCall.EquipmentTypeID as [ItemTypeID] from SrvcCall SrvcCall where SrvcCall.ContractID in (Select ContractID from GroupContracts where UserGroupID in (15)) and (SrvcCall.MfrName like 'HP') AND (SrvcCall.SubcomponentID = 84)@DateParam] Order By
- Comments: I feel that we are having a high failure rate of HP fusers and want to monitor the calls
- Related Change Requests: (Empty field)
- Created by User: Vespe, Robert R.
- Date Created: 3/6/2007
- Last Modified by User: Vespe, Robert R.
- Date Last Modified: 3/15/2007

Incident Management

On the incident screen, a search for problem records may be constructed, the incident may be linked to a particular problem, or, create a new Problem Record.

Incident Display

Incident Problems | Make Task | Activity Reports | Order Part | View Log | Repair Log | Notify | References | History |

VIEW SERVICE RECORD

Workflow Status [Not Initiated]

Service Record #: 213348	Contract #: 8068-000	Service Record Category: Request	Catalog Service: General Support (Service Call Management) -
Status: Closed	Priority: 1 - Low	QA Complete: NO	Classification: IMAC
Reference Incident #:	Reference Request #:	Reference Event #:	Customer Reference: R1445225

Problem Search Initiation

Back to Incident | Create Problem | **Relate Problems** | Help

INCIDENT [213348] RELATED PROBLEMS

Problem #	Problem Description	Manager
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Problem Search Criteria automatically populated with Incident data (may be modified to use Wildcard '%' criterion)

SEARCH RELATED PROBLEM

Problem #: <input type="text"/>	Impact: Select	Priority: Select
Urgency: Select	Item Type: PC	Status: Select All
City: <input type="text"/>	Subcomponent: None	Manager: Select All
State: <input type="text"/>	Manufacturer: DELL	Creation Date: <input type="text"/>
Zip: <input type="text"/>	Model #: GX9010	Closed Date: <input type="text"/>
Country: United States		

Problem Description:
Root Cause:
Problem Workaround:
Problem Fix:

Link to existing Problem

SELECT RELATED INCIDENT [213348] PROBLEMS

Problem #	Item Type	Manufacturer	Model	Manager
<input type="checkbox"/> 2	PC	HP	test	Fellers, Bridget S.
<input type="checkbox"/> 10	PC	DELL	GX240	Vespe, Robert R.
<input type="checkbox"/> 24	PC	HP/Compaq	DC7700	Zawasky, Patricia V.
<input type="checkbox"/> 29	PC	DELL	GX240	Vespe, Robert R.

Or, one can create a new problem record by choosing the 'Create Problem' menu tab. This will populate the new problem record with the service record information, and, create a link between the service and problem records.

Incident Management

2. Does the tool enable and maintain the relationships between Incident, and Problem records?
Comments: Yes. Relationships may be viewed, created, or removed from the incident.

VIEW SERVICE RECORD

Workflow Status [Not Initiated]

Service Record #: 209576 Contract #: 5999-000 Service Record Category: Request Catalog Service: General Support (Service Call Management) - No Price

Status: Closed Priority: 1 - Low QA Complete: NO Classification: None Time Zone: 0 Days: 24

Reference Incident #: Reference Request #: Reference Event #: Customer Reference #:

POC: Rachael Beaupre POC Phone: 703-698-8282 POC Extension: 251 POC @: Rachael.Beaupre@itgonline.com

Alternate POC: Alternate POC Phone: Alternate POC Extension:

Caller: POC Caller Phone: 703-698-8282 Caller Extension: 251 Agency: ITG Address 1: 2745 Hartland Road; 2nd floor Address 2: City: Falls Church State: VA Zip: 22043 Country: United States

Manufacturer: OTHER Model: 2013 Serial #: ITG209576 Description: OTHER New Serial #: Asset Tag #: Item Type: Other Type Subcomponent: None

Customer contacted after Service Record closed: Site User contacted:

The Service Record was opened as: Local Problem/known Error: 1

Problem Record

VIEW PROBLEM

Workflow Status [Not Initiated]

Problem #: 57 Impact: 2 - Med/Low-Somewhat Sig Priority: 2 - Med/Low-Somewhat Sig

Urgency: 2 - Med/Low-Somewhat Sig Item Type: Phone Systems Status: Problem (No Solution Available)

City: Subcomponent: Select Subcomponent Manager: Yum, Thomas

State: Manufacturer: MICROSOFT Creation Date: 09 15 2013

Zip: Model #: Lync 2013 Closed Date:

Country: United States

Problem Description: Since migrating to the 2013 Edge Server, users have been experiencing random call drops and quality issues

Problem Fix:

Related Incidents:

- 209576
- 208750
- 209865
- 209876
- 210345
- 210346
- 210734
- 210921
- 211683
- 211876
- 212117
- 212641

Root Cause: Problem Workaround:

Incident Management

3. Does the tool facilitate the closure of all Incidents when the associated Problem is resolved?
 Comments: Yes. All associated incidents to Problem Records are identified. Additionally, when the Problem status changes from 'Problem' to 'Known Problem or Closed', an email notification is sent to the Technical Manager's assigned to the Incidents (if the associated Incident(s) are not closed).

VIEW PROBLEM

Workflow Status [Not Initiated]

Problem #: 57 Impact: 2 - Med/Low-Somewhat Sig Priority: 2 - Med/Low-Somewhat Sig

Urgency: 2 - Med/Low-Somewhat Sig Item Type: Phone Systems Status: Problem (No Solution Available)

City: Subcomponent: Select Subcomponent Manager: Yes, Thomas

State: Manufacturer: MICROSOFT Creation Date: 08 15 2013

Zip: Model #: Lync 2013 Closed Date:

Country: United States

Problem Description:	Problem Fix:	Related Incidents:
Since migrating to the 2013 Edge Server, users have been experiencing random call drops and quality issues		209576 209753 209865 209876 210345 210346 210734 210921 211683 211876 212117 212641
Root Cause:	Problem Workaround:	

Select Status
 Problem (No Solution Available)
 Known Problem (Workaround Available)
 Closed (Permanent Fix Available)

Configuration Management

1. Does the tool integrate with a CMDB to support the association of Incident records to CI records?

Comments: Yes. The incident record integrates with the CMDB via the serial# and asset tag (which creates a unique field identifier)

Incident Record

VIEW SERVICE RECORD

Workflow Status [Not Initiated]

Service Record #: 213348 Contract #: 8068-000 Service Record Category: Request Catalog Service: General Support (Service Call Management) - No Price Option - Confirmed

Status: Closed Priority: 1 - Low QA Complete: NO IMAC Classification: Time Zone: 0 Days: 2

Reference Incident #: Reference Request #: Reference Event #: Customer Reference #: R1445225 Sub Reference #:

POC: Edgar POC Phone: 317- POC Extension: Lookup Engineer: Select Opened: 12 16 2013 12
 Alternate POC: Edgar Alternate POC Phone: Alternate POC Extension: Engineer: Contacted: 12 16 2013 12
 Caller: HUD Caller Phone: Caller Extension: Opened By: Munoz, Mark Dispatched: 12 17 2013 08
 Agency: HUD Agency: HUD Agency: HUD Look up TAM: Select Confirmed: On-Site: 12 17 2013 11
 Address #: 151 North Delaware St, Suite 1300 TAM: Seager, Terence P. Next ETA: Resolution: 12 18 2013 09
 City: Indianapolis State: IN Zip: 46204 Look up SME: Select BDM: Ceely, George B. Closed: 12 18 2013 09
 Country: United States Model: GX9010 Description: PC Sub: Bell Technlogix Part Orders: 0
 Serial #: D4KQXV1 SLA Code: S2 BS 24 Exception: Exception: Shipped Date: Urgency: 1 - Low
 New Serial #: SN verified Pending Action: Select

Associated CI

VIEW CONFIGUR

Contract #: 8068-000 POC Phone: 317-22

Alternate POC: Edgar Alternate POC Phone: Price: Warranty Start: Warranty End: Agency: HUD Site/Location: 151 North Delaware St, Suite 1300 Address #: City: Indianapolis State: IN Country: United States Lifecycle Status: None Response SLA Hours: 0 On-Site SLA Hours: 0 Repair SLA Hours: 0 Sales Order #:

CI Number: D4KQXV1 CI Number Summary

Old CI Number: Item Type: PC Subcomponent: Whole Unit Model: GX9010 Description: PC Manufacturer: DELL Quantity: CLIN: Asset Tag: Urgency: 1 - Low Impact: 1 - Low Priority: 1 - Low

Incident Management

Request Fulfillment

1. Does the tool provide integration with the Request Fulfillment tool to rapidly open Requests based on an existing Incident?

Comments: **Yes.** Incident management provides the ability to create a request fulfillment record from the existing incident. The references between the incident and request are maintained within each service record type.

Existing Incident

VIEW SERVICE RECORD

Workflow Status [Not Initiated]

Service Record #:	Contract #:	Service Record Category:	Catalog Service:
209576	5999-000	Request	General Support (Service Call Management)
Status:	Priority:	QA Complete:	Classification:
Closed	1 - Low	NO	None

Reference Incident #: Reference Request #: Reference Event #: Customer Reference #:

POC: Rachael Beaupre
POC Phone: 703-698-8282
POC @: Rachael.Beaupre@itgonline.com

Lookup Engineer: [Selected]
Engineer: [Selected]
Opened By: [Signed]

New Request Fulfillment from Incident Tab



New Fulfillment Service Record

NEW SERVICE RECORD

The mandatory editing fields are indicated with an asterisk *

Service Record #:	*Contract #:	*Service Record Category:	*Catalog Service:
New Record	5999-000	Request	General Support (Service Call Management)
*Status:			
Open			

Reference Incident #: Reference Request #: Reference Event #: Customer Reference #: Sub Reference #: Customer Order #:

209576

*POC: Rachael Beaupre
*POC Phone: 703-698-8282
*POC @: Rachael.Beaupre@itgonline.com

Alternate POC:
Alternate POC Phone:
Alternate POC Extension:

Lookup Engineer: [Selected]
Engineer: [Selected]
Opened By: [Selected]
Lookup TAM: [Selected]
TAM: [Selected]

Incident Management

Change Management

1. Does the tool provide integration with the Change Management tool to rapidly open Changes based on an existing Incident?

Comments: Yes. CENTRE's Incident Management System will permit the creation of a change request and add the linkages to the incident and change records. The 'Relate Change Request' tab will relate to a current change request via a search, and add those linkages to the change and incident records.

Incident

Incident Problems | Make Task | Activity Reports | Order Part | View Log | Repair Log | Notify | References | History | Survey | Survey No FE | Sub Visits | **Change Requests** |

VIEW SERVICE RECORD

Workflow Status [Not Initiated]

Service Record #: 201661	Contract #: 5999-000	Service Record Category: Incident	Catalog Service: General Support (Service Call Management) - No Price Option - Confirmed
Status: Closed	Priority: 1 - Low	QA Complete: NO	Classification: None
Time Zone: 0	Days: 0	Reference Incident #:	Reference Request #:
Reference Event #:	Customer Reference #:	Sub Reference #:	Cu

Create Change Request

Back to Service Record | **Create Change Request** | Relate Change Requests | Help

SERVICE RECORD [201661] RELATED CHANGE REQUESTS

NEW CHANGE REQUEST

The mandatory editing fields are indicated with an asterisk *

*Change Request Name:

*Category:

*Change Type:

*Change Authority:

Proposed Change:

*Desired Completion Date:

Incident with Linkage and Identification of a Change Request

VIEW SERVICE RECORD

Workflow Status [Not Initiated]

Service Record #: 201661	Contract #: 5999-000	Service Record Category: Incident	Catalog Service: General Support
Status: Closed	Priority: 1 - Low	QA Complete: NO	Classification: None
Reference Incident #:	Reference Request #:	Reference Event #:	

POC: Starla Johnson
POC Phone: 703-698-8282
POC Extension: 228
POC @: starla.johnson@itgonline.com

Alternate POC: _____
Alternate POC Phone: _____
Alternate POC Extension: _____

Caller: _____
Caller Phone: _____
Caller Extension: _____

Agency: ITG
Address 1: 2745 Hartland Rd
Address 2: _____
City: Falls Church
State: VA
Zip: 22043
Country: United States

Manufacturer: OTHER
Model: _____
Serial #: ITG201661
Description: LYNC
New Serial #: _____
Asset Tag #: 600390
Item Type: Server
Subcomponent: Hard Drive Arrays and Parts

Customer contacted after Service Record closed
 Site User contacted

The Service Record was opened as: Local

Change Requests 1

Incident Management

Change Record with link to Incident Service Record

VIEW CHANGE REQUEST [784]

Workflow Status [Not Initiated]

Change Request Name: Replacement of ITG-LyncFE1 RAID Controller

Category: Minor Change **Desired Completion Date:** 1/7/2013

Change Type: Hardware

Change Authority: Infrastructure MRB

Proposed Change: We will be removing the current drive array, consisting of 4 hard drives, from the existing ITG-LyncFE1 server and installing them into a new Dell PowerEdge 1950 server.

Description of current or potential non-conformance/justification: To address an intermittent issue we have been experiencing with the Lync front end server we will be isolating one of two possible causes by addressing each possibility in turn. In the event of an unforeseen problem, the drive array can be replaced into the original server, effectively reversing any changes.

Root Cause: The root cause of the intermittent crashing of the Lync front end server has been determined to be either a bad RAID controller or a faulty hard drive

Change Request Documents

Issued By: Yum, Thomas **Date Issued:** 1/7/2013 3:38:36 PM

Action Type: Corrective Action **Priority:** IMMEDIATE

Internal Audit Number:

Status: PI Review Pending

Approved By: Infrastructure MRB **Approved Date:** 1/7/2013 3:38:36 PM

Assigned To: Harris, George **Begin Work Date:** 1/7/2013 6:00:30 PM

Information Security Approval Required: NO **Due Date:** 1/7/2013 9:00:30 PM

Approving Security Officer:

Completed Date: 9/6/2013 2:15:27 PM

Approved by Security Officer: NO **Validation Date:**

Requirements: 0 **Date Last Updated:** 9/6/2013 2:16:43 PM

Service Records: 1 **Last Updated By:** Harris, George

Incident Management

OPTIONAL CRITERIA

1. Does the tool facilitate self help and communication options? For example, an interface that allows users to check the status of Incidents or view outage information.

Comments: **Yes.** Users can check on the status of Change Requests, Incidents, and Problem Records. The user may enter any search criteria singularly or combined (with wildcard entries) to tailor a report to their needs. Access is secured by user ID and password validation at various levels.

Change Request (maintains links to problems and incidents)

SEARCH CHANGE REQUEST

Change Request ID:

Change Request Name:

Proposed Change:

Potential Non-Conformance/Justification:

Root Cause:

Actions Summary:

Category:

Change Type:

Change Authority:

Action Type:

Internal Audit Number:

Information Security Approval Required:

Approving Security Officer:

Issued By:

Approved By:

Assigned To:

Status:

Priority:

Approved by Security Officer:

Problems (maintains links to RFC's and incidents)

SEARCH PROBLEM

Problem #:

Urgency:

City:

State:

Zip:

Country:

Impact:

Item Type:

Subcomponent:

Manufacturer:

Model #:

Service Record #:

Priority:

Status:

Manager:

Creation Date:

Closed Date:

Problem Description:

Root Cause:

Problem Workaround:

Problem Fix:

Incidents (maintains links to Problems and RFCs)

SEARCH FOR SERVICE RECORD

Service Record #:

Contract #:

Sub Reference #:

Catalog Service:

Customer Reference #:

Customer Order #:

POC:

POC @:

POC Phone:

Agency:

Address 1:

Address 2:

City:

State:

Zip:

Country:

Other:

Sub:

Part Orders:

Manufacturer:

Model #:

Serial #:

Asset Tag #:

Lookup Engineer:

Engineer:

SME:

BDM:

Status:

Item Type:

Subcomponent:

Classification:

Priority:

Urgency:

Impact:

Service Record Category:

Service Record Type:

Service Record Closure Type:

Pending Action:

Opened By:

TAM:

Opened Date Start:

Opened Date End:

Closed Date Start:

Closed Date End:

Billable:

Temporary Serial Used:

No Log Entry on this date:

SLA Code:

Invoice received:

Serial Number verified:

Customer contacted after Service Record closed:

All Service Records NOT Closed:

Site User contacted:

QA Complete:

Reference Incident #:

Reference Request #:

Reference Event #:

Service Record Description:

Service Record Resolution:

Missed SLA Type:

Missed SLA Reason:

Missed SLA Explanation:

Incident Management

2. Does the tool facilitate the use of knowledge and or support scripts for Incident diagnosis and resolution?

Comments: **Yes.** The DCS (Document Control System) maintains knowledge support and incident diagnosis/resolution documents and reports.

Search Screen

SEARCH FOR DOCUMENT

Document #: -V:

Title:

Abstract:

File Names:

Owner:

Obsolete:

Classification Level:

Document Content:

Authors:	Departments:	Document Type:	Document Keywords:
Abel Medina Andreas Tzoumas Benjamin Soto Bill Fowkes Bill Halladay	Accessibility Solutions Group Accounting Administrative Best Practices Business Development	Business Quality Manual Call Operator Tests CENTRE Documentation Charts Checklists	101 20000 2009 201 2010



Document#	Document Type	DCS Submission Date	Classification Level	Obsolete	OW
Document #317-V4	Work Instructions/Descriptions	10/22/2004 5:24:00 PM	1 - Public	No	Eric T
Publication Info		Review Date	Contents Revised		
		10/4/2012 12:10:02 PM	9/27/2010 12:45:12 PM		
Authors		Department	Restricted to		
Yi-Chiu Lin		Electronic Repairs			
Abstract		View Document			
Troubleshooting procedure for technicians to follow when processing the repair of a Braille embosser. Revised to update the footer. This document was confirmed as being valid and accurate by the author on September 17, 2010.		Braille Embosser Troubleshooting Procedure - Electronic Repairs v4.doc			



Integration Technologies Group, Inc.

ITG Braille Embosser Troubleshooting Procedure

All work is to be done in accordance with **ITG** ESD and Safety procedures.

Initial Actions:

1. a) Verify original complaint and any attempts to repair this unit offsite by

Incident Management

Organization Name	Integration Technologies Group, Inc.
Brand name of Product	CENTRE (Common ENTerprise, REsource, system)
Version of Product to be Assessed	Release 4.6.8
Client Contact Name and Title	Robert R. Vespe Consultant
Address	2745 Hartland Road, 2nd Floor Falls Church, VA 22043
Phone #	305 909-3591
Email	Robert.Vespe@ITGOnline.com

Document Revised 12/19/2013