

Request Fulfillment Management

MANDATORY CRITERIA

1. Does the tool facilitate the creation, modification, fulfillment and closure of Service Request records?

Comments: **Yes.** The tool facilitates; the creation of a fulfillment with a unique id #, modification of the fulfillment with permanent edit logs, resolution with comments, and closure with a close date and closure type.

ITG's CENTRE Service Record Screen

The screenshot displays the 'VIEW SERVICE RECORD' interface. Key elements include:

- Workflow Status:** [Not Initiated]
- Service Record #:** 212629
- Contract #:** 8045-111
- Service Record Category:** Incident
- Catalog Service:** General Support (Service Call Management) - No Price Option - Confirmed
- Status:** Closed
- Priority:** 1 - Low
- QA Complete:** NO
- Classification:** Whole Unit Replacements
- Time Zone:** -3
- Days:** 33
- Reference Incident #:** []
- Reference Request #:** []
- Reference Event #:** []
- Customer Reference #:** []
- Sub Reference #:** []
- Customer Order #:** []
- POC Efra:** []
- POC Phone:** 760- []
- POC Extension:** []
- POC @ Efra:** []
- Alternate POC:** []
- Alternate POC Phone:** []
- Alternate POC Extension:** []
- Caller:** []
- Caller Phone:** []
- Caller Extension:** []
- Agency:** USDA-FS - Ramona Air Attack Base
- Address 1:** Ramona Helitack Office - 2498 Montecito Rd.
- Address 2:** []
- City:** Ramona
- State:** CA
- Zip:** 92065
- Country:** United States
- Manufacturer:** LEXMARK
- Model:** C782
- Serial #:** G4DW5M5
- Description:** Printer
- New Serial #:** 1014792
- Asset Tag #:** []
- Item Type:** Printer
- Subcomponent:** Whole Unit, Laser
- SLA Code:** []
- SLA Exceptions:** Exception Open: [] Exception Count: 1
- Parts Not Shipped:** 0
- SLA Type:** []
- Calculated:** []
- SLA:** []
- SLA Met?:** []
- Responses:** 0.1
- On-Site:** 15.3
- Repair:** 0
- Resolution:** 12 18 2013 16 41
- Closed:** 12 18 2013 16 41
- Service Record Type:** Support
- Service Record Closure Type:** Support
- Pending Action:** Select
- Comments:** Entered on: 12/18/2013 4:39:07 PM by:Reed, Steven W. Spoke with co-worker Michael Sears. They configured the printer Monday afternoon. It is working fine. ok to close ticket

2. Does the tool provide a pre-defined list of services which can be requested by end users?

Comments: **Yes.** The end user may request items available in the Service Catalog

3. Does the tool provide the requestor with an entitlement-based view of the services they are authorized to request?

Comments: **Yes.** The requestor (requires a login and password) upon selecting the "Service Catalog", will be in view of all services contracted for the relevant contract(s).

CONTRACT SERVICES														
Service Name	Service Type	CLIN	Price Option	Qty	Unit	Unit Cost	Total Cost	Service Status	Start Date	End Date	Allow Incident	Allow Request	Allow Event	
Computer Warranty Service & Maintenance [Computer Warranty Service & Maintenance]	Hardware Maintenance		1 to 49 Units	1	1	1,152.96	1,152.96	Terminated	12/01/2009	12/31/2010	0	0	0	Edit
Email [Email]	IT Services		Variable	0	1	1.00	0.00	Confirmed	05/01/2012	05/01/2018	1	1	1	Edit
General Support (Service Call Management) [General Support (Service Call Management)]	General Support	0001	No Price Option	1	1	0.00	0.00	Confirmed	01/01/1990	01/01/2020	1	1	0	Edit
1														
Pending Contract Services														
Service Name	Service Type	CLIN	Price Option	Qty	Unit	Unit Cost	Total Cost	Service Status	Start Date	End Date	Allow Incident	Allow Request	Allow Event	
Desktop/Server/Printer Installation [Desktop/Server Installation]	Hardware Installations	001	No Price Option	0	1	1.00	0.00	Confirmed	01/01/2009	12/31/2010	1	1	0	Edit Delete
General IT/Network Support [Network maintenance and technical support]	IT Services	0001	No Price Option	0	1	1.00	0.00	Cancelled	01/01/2010	12/31/2010	1	0	0	Edit Delete
Printer Installations [Printer Installations]	Hardware Installations		No Price Option	0	1	1.00	0.00	Confirmed	07/01/2010	07/31/2010	1	0	0	Edit Delete
1														

Request Fulfillment Management

4. Does the tool automate request routing for appropriate authorizations? (e.g.: Financial, security, etc.)

Comments: **Yes.** The fulfillment record may be routed to appropriate authorizations via the 'Notification Event' module. This module uses the power of ad-hoc reporting to route and deliver notices as needed.

SYSTEM CONFIGURATION

- [Alerts:](#) Configure system provided alert notifications
- [User Groups:](#) Manage user groups
- [Other Emails:](#) Manage external email addresses
- [Users:](#) Manage users
- [User Hierarchy:](#) Configure organization hierarchy for time sheet approval
- [Workflows:](#) Configure module workflows
- [Notification Events:](#) Configure automatic email notifications

5. Does the tool allow the end user to submit service requests, get detailed request status visibility, and cancel service orders that are no longer necessary?

Comments: **Yes.** The end user may submit and monitor service requests, and issue cancellations.

View Request

SELECT SERVICE RECORD View Large Page														
Service Record #	Service Record Category	Contract #	POC Name	POC Phone	Agency	City	State	Country	Part Orders	Shipped	Sub	Days	Opened	Close
<input type="radio"/> 212206	Request	8068-000	Ken		HUD	Columbus	OH	United States	0			54	10/30/2013 22:24	
<input type="radio"/> 212207	Request	8068-000	Pe		HUD	Washington	DC	United States	0		None	54	10/30/2013 22:30	
<input type="radio"/> 212305	Request	8068-000	Allan		HUD	Chicago	IL	United States	0		M. A. Zurakov & Co.	49	11/4/2013 12:00	
<input type="radio"/> 212738	Request	8068-000	Glo		HUD	Detroit	MI	United States	0		Basic Tech Computers	33	11/20/2013 17:31	
<input type="radio"/> 212927	Request	8068-000	Jos		HUD	Fargo	ND	United States	1	12/9/2013	Computer Techs	21	12/20/2013 11:04	
<input type="radio"/> 213151	Request	8068-000	Jos		HUD	Kansas City	KS	United States	0		AMPM Service, Inc.	14	12/9/2013 12:15	
<input type="radio"/> 213152	Request	8068-000	Jill		HUD	Buffalo	NY	United States	0		Dualex, Inc.	14	12/9/2013 12:15	
<input type="radio"/> 213154	Request	8068-000	R		HUD	Philadelphia	PA	United States	0		Accurate Technologies	14	12/9/2013 12:20	
<input type="radio"/> 213157	Request	8068-000	C		HUD	Houston	TX	United States	0			14	12/9/2013 12:22	
<input type="radio"/> 213158	Request	8068-000	L		HUD	Anchorage	AK	United States	0		Alaska Computer & Typewriter	14	12/9/2013 12:32	
<input type="radio"/> 213180	Request	8068-000	C		HUD	Honolulu	HI	United States	0		Pacific Computer (RW)	14	12/9/2013 12:49	
<input checked="" type="radio"/> 213161	Request	8068-000	R		HUD	New Orleans	LA	United States	0		C4 Tech & Design	14	12/9/2013 12:55	
<input type="radio"/> 213182	Request	8068-000	Bar		HUD	Minneapolis	MN	United States	0		ALT-KIE Computer Consultants, Inc.	14	12/9/2013 13:06	

VIEW SERVICE RECORD

Workflow Status [Not Initiated]

Service Record #: 213161 Contract #: 8068-000 Service Record Category: Request Catalog Service: General Support (Service Call Management) - No Price Option - Confirmed

Status: Deferred Priority: 1 - Low QA Complete: NO Classification: IMAC Time Zone: -1 Days: 14

Reference Incident #:	Reference Request #:	Reference Event #:	Customer Reference #:	Sub Reference #:	Customer Order #:
			R1		

POC: Russell POC Phone: 504- POC Extension: POC @: russell

Alternate POC: Alternate POC Phone: Alternate POC Extension: Caller: HUD Caller Phone: Caller Extension: Agency: HUD Address 1: Hale Boggs Federal Building Address 2: 500 Poydras Street, 9th Floor City: New Orleans State: LA Zip: 70130 Country: United States

Manufacturer: DELL Model: E6430 Serial #: ITG213161 Description: LAPTOP New Serial #: Asset Tag #: Item Type: Laptop Subcomponent: None

Customer contacted after Service Record closed Site User contacted The Service Record was opened as: Remote

Lookup Engineer: Select Engineert: Opened By: Munoz, Mark Lookup TAM: Select TAM: Dudley, Christopher Lookup SME: Select SME: BDM: Ceely, George B. Sub: C4 Tech & Design Sub Rating: 0 Billable: AR: SLA Code: Y2 BS 24 SLA Exceptions: Exception Open: Exception Count: 1 Parts Not Shipped: 0

Opened: 12 09 2013 12 55 Contacted: 12 09 2013 13 20 Dispatched: Confirmed: On-Site: Next ETA: 12 24 2013 11 00 Resolution: Closed: Part Orders: 0 Last RMA: Shipped Date: Urgency: 1 - Low Impact: 1 - Low Service Record Type: IMAC Service Record Closure Type: IMAC Pending Action: Select SLA Type Calculated SLA Response: 0.44 1 On-Site: 0 0 Repair: 0 33

Request Fulfillment Management

Notify Tab for Request Cancellation

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

VIEW SERVICE RECORD

Workflow Status [Not Initiated]

Service Record #: 213161 Contract #: 8068-000 Service Record Category: Request Catalog Service: General Support (Service Call Management) - No Price Option - Confirmed

Status: Deferred Priority: 1 - Low QA Complete: NO Classification: IMAC Time Zone: -1 Days: 14

Reference Incident #: Reference Request #: Reference Event #: Customer Reference #: R1441336 Sub Reference #:

POC: Russell E. Quinlan Lookup Engineer: Select Opened:

Get Recipients

SERVICE RECORD NOTIFICATION

Message Type: None

Message: 12/23/2013 4:02:07 PM

Service Record #: 213161
 Category: Request
 Customer Reference #: R1441336
 Contract #: 8068-000
 BDM: Ceely, George B.

Name	Email Address	Pager Address	Email Page Add/Delete
			<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

6. Does the tool automate the rapid categorization (e.g.: Provisioning vs. request for information), classification and recording of Service Requests?

Comment: Yes. CENTRE provides this by use of the drop down selections for Service Record Classification. Using these controlled response fields, classification selections are specific and may be queried for further actions.

VIEW SERVICE RECORD

Workflow Status [Not Initiated]

Service Record #: 213161 Contract #: 8068-000 Service Record Category: Request Catalog Service: General Support (Service Call Management) - No Price Option - Confirmed

Status: Deferred Priority: 1 - Low QA Complete: NO Classification: IMAC Time Zone: -1 Days: 14

Reference Incident #: Reference Request #: Reference Event #: Customer Reference #: R1441336 Sub Reference #: Customer Order #:

POC: Russell E. Quinlan
 POC Phone: 504- POC Extension: POC @: russell
 Alternate POC: Alternate POC Phone: Alternate POC Extension: Caller: HUD Caller Phone: Caller Extension: Agency: HUD Address 1: Hale Boggs Federal Building, Address 2: 500 Poydras Street, 9th Floor City: New Orleans State: Country: United States Manufacturer: DELL Model: E64 Serial #: ITG213161 Description: Laptop Laptop Depot Service LD Hardware LD Software Learning Software LGB CENTRE Software Low Vision Accessories Low Vision Hardware Low Vision Software MICR Reader Minicomputer Mobile Broadband Mobility Accessories Mobility Hardware Mobility Software Monitor MOUSE MS Office S/W Support Multifunction Printer Networking Devices Office Live Comm Svr 2003 English OLP NL Other Type Pager PC PC Depot Service PDA Phone Systems Plotter

Lookup Engineer: Select Engine: Munoz, Mark Opened By: Munoz, Mark Lookup TAM: Dudley, Christopher Lookup SME: Exception Count: 1

Opened: 12 09 2013 12 55 Contacted: 12 09 2013 13 20 Dispatched: Confirmed: On Site: Next ETA: 12 24 2013 11 00 Resolution: Closed: Part Orders: 0 Last RMA: Urgency: 1 - Low Impact: 1 - Low Service Record Type: IMAC Service Record Closure Type: IMAC Pending Action: Select

SLA Type Calculated SLA SLA Met ?
 Response: 0.44 1
 On Site: 0 0

1 - Low
 2 - Med/Low
 3 - Medium
 4 - Med/High
 5 - High

Select
 Business Incident
 Customer Complaint
 Failure of Process
 IMAC
 Interruption of Service
 Operations Incident
 Security
Support
 Training
 unknown


General Support (Service Call Management) - No Price Option - Confirmed


Request Fulfillment Management


7. Does the tool have well-designed interface, making it easy for users to find services and order from a standard 'menu' of pre-defined service options?

Comments: Yes. Service Catalog drop-down menu is available for users to find and order authorized services.

SERVICE TYPES


Data Migrations


General Support is the default service type used during the Release update.


ITG can assist you with a hardware installations or help you create an automated, repeatable, and sustainable process for deploying tens or hundreds of hardware devices using a standard set of tools.

SERVICES OFFERED

Contract: 5999-000 Service Type: General Support

Service Name	CLIN Price Option	Unit Cost	Qty	Start Date	End Date	Select
Best Practices Consulting (General Support)	Select Price Option		▼	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
General Support (Service Call Management) (General Support)	0000 Select Price Option		▼	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Request Fulfillment Management

8. Does the tool allow for matching of new Requests against existing Requests?

Comments: **Yes.** The Search option (opening screen) allows for the matching of requests by selectable criteria.

The screenshot shows the 'SEARCH FOR SERVICE RECORD' interface. At the top, there is a navigation bar with 'Home', 'IT Service Management', 'Change & Configuration Management', 'Supply Chain Management', and 'Measu An'. Below this, a breadcrumb trail reads 'You are here: 1- IT Service Management'. A menu bar contains 'New Incident | New Request | New Event | New Problem | Search'. The main search area is titled 'SEARCH FOR SERVICE RECORD' and contains numerous filters and dropdown menus, including fields for Service Record #, Contract #, Item Type, Urgency, Sub Reference #, Catalog Service, Subcomponent, Impact, Customer Reference #, Customer Order #, Classification, Priority, POC, Part Orders, Service Record Category, Service Record Type, Service Record Closure Type, Pending Action, Address 1, Address 2, City, State, Zip, Country, Status, Look Up Engineer, Engineers, SME, BDM, Opened Date Start/End, Closed Date Start/End, Billable, Temporary Serial Used, No Log Entry on this date, SLA Code, Invoice received, and Serial Number verified. There are also checkboxes for 'Customer contacted after Service Record closed' and 'All Service Records NOT Closed'.

9. Does the tool facilitate customizable thresholds for automated escalation?

Comments: **Yes.** Depending on what threshold to escalate, one may use the “Notification Events” or ‘PPMS’ subsystems to detect and report. Notification via SLA thresholds (percentage of used time) is customizable to five (5) levels of SLA compliance.

The screenshot shows the 'SYSTEM CONFIGURATION' page with a list of settings:

- Alerts:** Configure system provided alert notifications
- User Groups:** Manage user groups
- Other Emails:** Manage external email addresses
- Users:** Manage users
- User Hierarchy:** Configure organization hierarchy for time sheet approval
- Workflows:** Configure module workflows
- Notification Events:** Configure automatic email notifications

The 'Notification Events' item is circled in blue.

Request Fulfillment Management

PPMS

NEW POTENTIAL PROBLEM SPECIFICATION SCAN REQUEST

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

*Scan Request Name: _____

Description: _____

*Scan Request Query: Select Query _____

*Priority Level: Select _____

*Problem Status: Select _____

*Scan Status: Select _____

(This scan request will only be executed if Active)

*Scan Number of Days Prior to Current Date: _____

*Scan on Date Column: Select Column _____

(Select the Date Column upon which to apply the Number of Days query)

*Scan Frequency Type: Select _____

(Select Hours or Days)

*Scan Frequency Value: 1

*Number of Matches: _____

*Problem Assigned to User: Select _____

*Alert Notification Email Address: _____

*Enable Email Notification: Select _____

Select Query: _____

Comments: _____

Created by User: **Vespe, Robert R.**
 Date Created: **12/23/2013 4:50:30 PM**
 Last Modified by User: **Vespe, Robert R.**
 Date Last Modified: **12/23/2013 4:50:30 PM**

10. Does the tool enable priority, impact, and urgency indicators to be assigned to Service Request records?

Comments: **Yes.** Impact and urgency are selectable fields which, when combined, determine the priority indicator.

VIEW SERVICE RECORD

Workflow Status [Not Initiated]

Service Record #: 213348 Contract #: 8068-006 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: Days: 0 2

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

POC: Edga. _____ POC Phone: 317-... POC Extension: _____ POC @: Edgar _____

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

Caller: HUD Caller Phone: _____ Caller Extension: _____ Agency: HUD

Address 1: 151 North Delaware St, Suite 1300 Address 2: _____ City: Indianapolis State: IN Zip: 46204 Country: United States

Manufacturer: DELL Mode: GX9010 Serial #: D4KQXV1 Description: PC New Serial #: _____ S/N verified

Lookup Engineer: Select _____ Engineer: _____ Opened By: Munoz, Mark

Lookup TAM: Select _____ TAM: Seager, Terence P. Lookup SME: Select _____ SME: _____ BDM: Ceely, George B.

Sub: Bell Technlogix Sub Rating: 4 Billable: AB Tasks: 0 SLA Code: S2 BS 24

Opened: 12 16 2013 12 Contacted: 12 16 2013 12 Dispatched: 12 17 2013 08 Confirmed: _____ On-Site: 12 17 2013 11 Next ETA: _____ Resolution: 12 18 2013 09 Closed: 12 18 2013 09

Part Orders: 0 Shipped Date: _____ Urgency: 1 - Low Impact: 1 - Low Service Record Type: IMAC Service Record Closure Type: IMAC Pending Action: Select

11. Does the tool support the automated routing (alerting) to, and coordination of Service Requests among selected support staff or groups? For example, the Service Desk, Network Operations, Telecom, etc.

Comments: **Yes.** This is doable using the “Notification Events” or Workflow subsystems.

SYSTEM CONFIGURATION

[Alerts](#): Configure system provided alert notifications

[User Groups](#): Manage user groups

[Other Emails](#): Manage external email addresses

[Users](#): Manage users

[User Hierarchy](#): Configure organization hierarchy for time sheet approval

[Workflows](#): Configure module workflows

[Notification Events](#): Configure automatic email notifications

Request Fulfillment Management

12. Does the tool facilitate complex request workflows through sequential and parallel tasking?

Comments: **Yes.** Sequential and parallel tasking can be facilitated through workflows which operate against tasks within projects. Fulfillment service records may create work tasks which fall into this workflow initiative.

Workflow Status [Not Initiated]

Task Name: Software Sales (This task is being renamed- Software and Services e-Marketing)

Task Description: 10/15/2012 This task is being modified to include re-design and optimization services for all ITG web-sites.
Under this Task Maurice Giguere will perform research, marketing and sales efforts until such time that an actual contract is secured. All marketing efforts will continue to be billed to this task. except for contract specific work

Predecessor Task: None

Milestone

Task Type: Select

Task Manager: Kallan...

13. Does the tool facilitate flexible report generation?

Comments: **Yes.** There are multiple report generation features. Reports may be generated from the 'Reports Menu', via the search screens, or from the Ad-hoc reporting system.

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	<input type="radio"/> Parts Owed by Field Engineers > 7 Days - (Y) <input type="radio"/> All Parts Owed > 7 Days - (Y)	<input type="radio"/> Parts Owed by Subcontractors > 7 Days - (Y)
Activity Reports	<input type="radio"/> Activity Reports Owed by Subcontractors > 7 Days - (Y)	
Service Records	<input type="radio"/> Find Service Record Percentage (Performance Measurements) <input type="radio"/> Item Type Service Record Summary By Contract and Item Type (Project Performance Measurements) <input type="radio"/> TAM Open Service Records Not Dispatched <input type="radio"/> TAM Open Service Records Dispatched w/Parts Shipped <input type="radio"/> Service Records and Service Record Complaints By Region <input type="radio"/> Service Record Performance By Serial Number <input type="radio"/> Service Record Type by Contract	<input type="radio"/> Find Service Record Percentage By Hour (Performance Measurements) <input type="radio"/> Open Service Records By Contract <input type="radio"/> TAM Open Service Records Dispatched <input type="radio"/> Company Score Card (Project Performance Measurements) <input type="radio"/> Item Types in Service Records Vs Contract Item List <input type="radio"/> SLA Performance For Each Contract <input type="radio"/> Average Costs per Item Type For Each Contract <input type="radio"/> Project Financials

Home | **IT Service Management** | Change & Configuration Management | Supply Chain Management | Measure An

You are here:
1- IT Service Management

New Incident | New Request | New Event | New Problem | Search

SEARCH FOR SERVICE RECORD

Service Record #: Contract #: Item Type: Select URGENCY: Select All

Sub Reference #: Catalog Service: None Subcomponent: None IMPACT: Select All

Customer Reference #: Customer Order #: Classification: Select All Priority: Select All

POC: Part Orders: None Service Record Category: Select All

POC Phone: Manufacturer: Service Record Type: Select All

Agency: Model #: Service Record Closure Type: Select All

Address 1: Serial #: Pending Action: Select

Address 2: Asset Tag #: Opened By: None

City: Lookup Engineer: None TAM: None

State: Engineer: Opened Date Start:

Zip: SME: Select Opened Date End:

Country: Select BDM: Select Closed Date Start:

Other: None Status: Select All Closed Date End:

Sub: Select All Billable: Select

Customer contacted after Service Record closed: Select All Service Records NOT Closed: Select No Log Entry on this date:

Site User contacted: Select QA Complete: Select All SLA Code:

Reference Incident #: Invoice received: Select

Reference Request #: Serial Number verified: Select

Reference Event #:

Service Record Description:

Service Record Resolution:

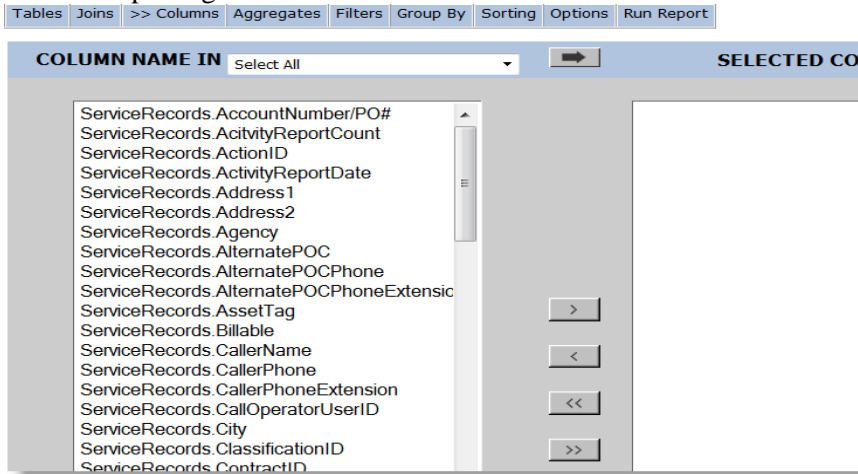
Missed SLA Type: Select

Missed SLA Reason: Select

Missed SLA Explanation:

Request Fulfillment Management

Ad-hoc Reporting

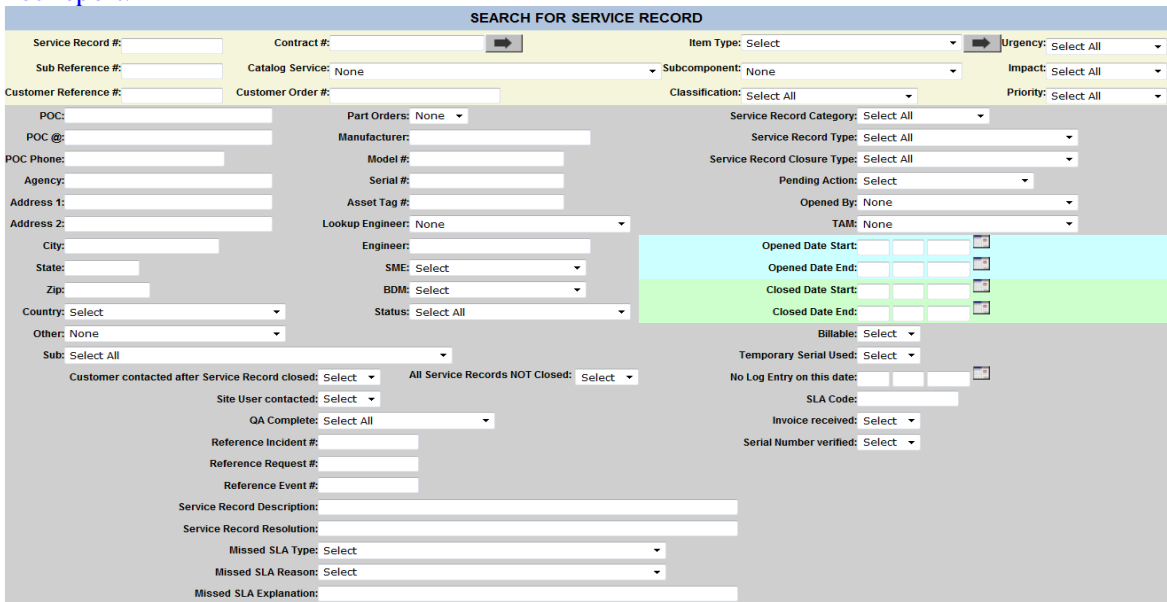


14. Does the tool facilitate the analysis of Service Requests to identify trends?

Comments: Yes. The user may use the opening search screen and generate a search by a single or multiple fields. Additionally, the PPMS can search and generate reports via the combination of ad-hoc and screen parameter identifiers. Finally, the user may create an ad-hoc report.

15. Is the tool facilitating the generation of reports on outstanding (incomplete) Service Requests?

Comments: Yes. Search can be accomplished via the open search screen and/or the use of an ad-hoc report.



Request Fulfillment Management

16. Can the tool link to feeds from other tools and departments, and provide information to other tools and departments (e.g.: HR, facilities)?

Comments: **Yes.** There are several feeds and links within CENTRE. Personnel information (users) is available throughout the modules in CENTRE. As users are assigned to different projects or use other modules, information is captured. Financial information is imported into the Projects modules monthly for evaluation and comparisons.

MANAGE PROJECTS																	
Project Name	Survey	Contract Number	Status	Priority	Plan Start Date	Projected Start Date	Actual Start Date	Planned End Date	Projected End Date	Actual End Date	POC	CPI	SPI	DAR	Project Summary	Tasks	Actual Hours
Resource billing	Search	8222-000	Active	1	11/14/2011 8:00:00 AM	11/13/2011 9:00:00 AM	11/13/2011 9:00:00 AM	11/14/2016 6:00:00 PM	11/14/2016 6:00:00 PM		Jason Dudley			No	Summary	Tasks	

Project :Resource billing	
Resource Hours	
Resource Name	Work Hours
Guidry, Yves N. (Nino)	40
Reilly, Thomas A.	506
Gonsalves, Geraldine A.	0.5
Lin, Yi-Chiu	110.5
Medina, Abel F.	0
Rigney, Jason R.	0
Beaupre, Rachael C.	0
Bohner, Frederick V.	47.25
Ceely, George B.	0
Dudley, Jason (n)	12
Hicks, Adrian G.	3687
Holmlund, Kimberly B.	0
Su, Jackson	3846.8

ASSIGN MEMBERS TO TASK [General Time]

Select Group:

Select Skill: ➔

[View Resource Capacity](#)

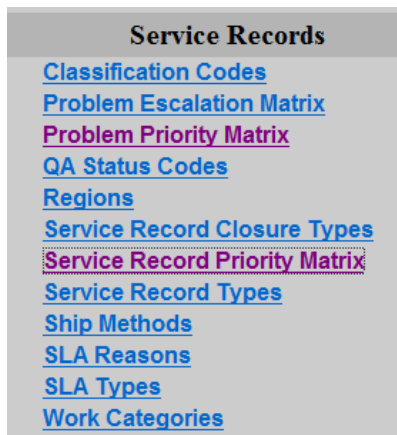
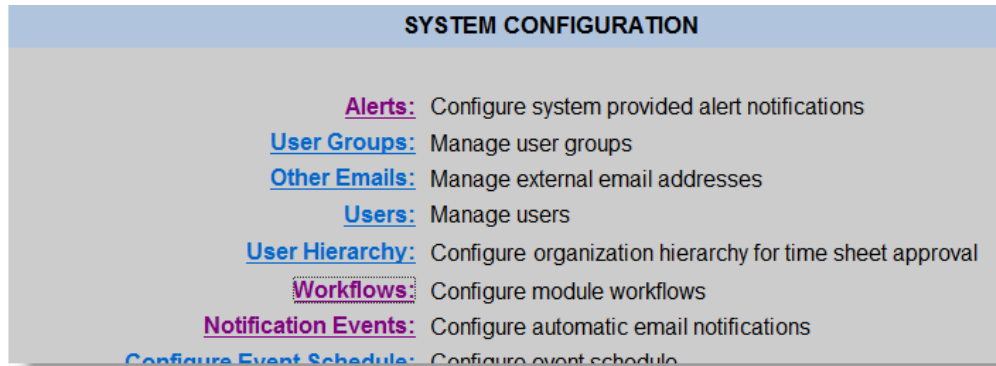
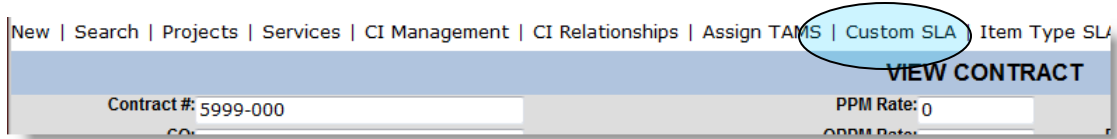
Available Members	Assigned Members
Abdul-Rahmaan, Caleeh(1) Admin(4) AFSCME(1)	Akmeemanage, Chandralal (Don)(0)[0] Beaupre, Rachael C.(0)[0] Bohner, Frederick V.(47.25)[0]

Expenses and Income for a period per Project							
Project Selected: 8222-000							
Project Period Selected: 2013 / 7 - 2013 / 12							
Gross Margin Parameter:							
Project	Revenue	Direct Expenses	Indirect Expenses	Net Income	Gross Income	Net Profit %	Gross Profit %
8222-000		58	76	33			

Request Fulfillment Management

17. Does the tool facilitate the creation of business rules for specific requests or groups of requests in order to automate the process, tasks, notifications, etc.?

Comments: **Yes.** The tool facilitates the creation of custom SLAs, alert generation upon status change of any field, creation of contract-based service catalog, priority state depending on impact and urgency, applicable support staff selection upon contract selection and custom workflow creation.



CONTRACT SERVICES											
View Contract: 5999-000											
Service Name	Service Type	CLIN	Price Option	Qty	Unit	Unit Cost	Total Cost	Service Status	Start Date	End Date	
Computer Warranty Service & Maintenance [Computer Warranty Service & Maintenance]	Hardware Maintenance		1 to 49 Units	1	1	1,152.96	1,152.96	Terminated	12/01/2009	12/31/2010	
Email [Email]	IT Services		Variable	0	1	1.00	0.00	Confirmed	05/01/2012	05/01/2018	
General Support (Service Call Management) [General Support (Service Call Management)]	General Support	0001	No Price Option	1	1	0.00	0.00	Confirmed	01/01/1990	01/01/2020	

Request Fulfillment Management

18. Does the tool facilitate the tracking of Service Requests against established SLA targets?

Comments: **Yes.** There are management reports as well as the ad-hoc system in which to track SLA service against targets.

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	<input type="radio"/> Parts Owed by Field Engineers > 7 Days - (Y) <input type="radio"/> All Parts Owed > 7 Days - (Y) <input type="radio"/> Parts Owed by Subcontractors > 7 Days - (Y)
Activity Reports	<input type="radio"/> Activity Reports Owed by Subcontractors > 7 Days - (Y)
Service Records	<input type="radio"/> Find Service Record Percentage (Performance Measurements) <input type="radio"/> Item Type Service Record Summary By Contract and Item Type (Project Performance Measurements) <input type="radio"/> TAM Open Service Records Not Dispatched <input type="radio"/> TAM Open Service Records Dispatched w/Parts Shipped <input type="radio"/> Service Records and Service Record Complaints By Region <input type="radio"/> Service Record Performance By Serial Number <input type="radio"/> Service Record Type by Contract <input type="radio"/> Find Service Record Percentage By Hour (Performance Measurements) <input type="radio"/> Open Service Records By Contract <input type="radio"/> TAM Open Service Records Dispatched <input type="radio"/> Company Score Card (Project Performance Measurements) <input type="radio"/> Item Types in Service Records Vs Contract Item List <input type="radio"/> SLA Performance For Each Contract <input type="radio"/> Average Costs per Item Type For Each Contract <input type="radio"/> Project Financials

SLA Performance For Each Contract

19. Does the tool measure ongoing demands for specific services and requests for those services?

Comments: **Yes.** There are several reports available on the 'Measurement and Analysis' menu. The opening search screen of the 'Service Records' permits the use of searching by one or multiple fields. And, the ad-hoc system may be used to report by specific services.

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	<input type="radio"/> Parts Owed by Field Engineers > 7 Days - (Y) <input type="radio"/> All Parts Owed > 7 Days - (Y) <input type="radio"/> Parts Owed by Subcontractors > 7 Days - (Y)
Activity Reports	<input type="radio"/> Activity Reports Owed by Subcontractors > 7 Days - (Y)
Service Records	<input type="radio"/> Find Service Record Percentage (Performance Measurements) <input type="radio"/> Item Type Service Record Summary By Contract and Item Type (Project Performance Measurements) <input type="radio"/> TAM Open Service Records Not Dispatched <input type="radio"/> TAM Open Service Records Dispatched w/Parts Shipped <input type="radio"/> Service Records and Service Record Complaints By Region <input type="radio"/> Service Record Performance By Serial Number <input type="radio"/> Service Record Type by Contract <input type="radio"/> Find Service Record Percentage By Hour (Performance Measurements) <input type="radio"/> Open Service Records By Contract <input type="radio"/> TAM Open Service Records Dispatched <input type="radio"/> Company Score Card (Project Performance Measurements) <input type="radio"/> Item Types in Service Records Vs Contract Item List <input type="radio"/> SLA Performance For Each Contract <input type="radio"/> Average Costs per Item Type For Each Contract <input type="radio"/> Project Financials

You are here:

1- IT Service Management

New Incident | New Request | New Event | New Problem | **Search** |

Request Fulfillment Management

SEARCH FOR SERVICE RECORD

Service Record #: Contract #: Item Type: Urgency:

Sub Reference #: Catalog Service: Subcomponent: Impact:

Customer Reference #: Customer Order #: Classification: Priority:

POC: Part Orders: Service Record Category:

POC @: Manufacturer: Service Record Type:

POC Phone: Model #: Service Record Closure Type:

Agency: Serial #: Pending Action:

Address 1: Asset Tag #: Opened By:

Address 2: Lookup Engineer: TAM:

City: Engineer: Opened Date Start:

State: SME: Opened Date End:

Zip: BDM: Closed Date Start:

Country: Status: Closed Date End:

Other: Billable:

Sub: Temporary Serial Used:

Customer contacted after Service Record closed: All Service Records NOT Closed: No Log Entry on this date:

Site User contacted: SLA Code:

QA Complete: Invoice received:

Reference Incident #: Serial Number verified:

Reference Request #:

Reference Event #:

Service Record Description:

Service Record Resolution:

Missed SLA Type:

Missed SLA Reason:

Missed SLA Explanation:

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

COLUMN NAME IN

ServiceRecords.AccountNumber/PO#

ServiceRecords.AcitivityReportCount

ServiceRecords.ActionID

ServiceRecords.ActivityReportDate

ServiceRecords.Address1

ServiceRecords.Address2

ServiceRecords.Agency

ServiceRecords.AlternatePOC

ServiceRecords.AlternatePOCPhone

ServiceRecords.AlternatePOCPhoneExtensic

ServiceRecords.AssetTag

ServiceRecords.Billable

Request Fulfillment Management

INTEGRATION CRITERIA

Terminology

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

Comments: **Yes.**

Incident Management

1. Does the tool support the automated creation of Request Records from open Incident Records?

Comments: **Yes.**

Existing Service Record

Workflow Status [Not Initiated]	VIEW SERVICE RECORD		
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 #:
			Custom
POC:	Rachael Beaupre		Lookup Engineer: Selected
POC Phone:	703-698-8282	POC Extension: 251	Engineer:
POC @:	Rachael.Beaupre@itgonline.com		Opened By: Sisine

New Request Fulfillment from Incident Tab



New Fulfillment 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 #:
209576			
*POC:	Rachael Beaupre		Lookup Engineer: Selected
*POC Phone:	703-698-8282	POC Extension: 251	Engineer:
*POC @:	Rachael.Beaupre@itgonline.com		Opened By: V...
Alternate POC:			Lookup TAM: Selected
Alternate POC Phone:			TAM:

Problem Management

1. Does the tool support Incident trending and Problem identification related to Requests?

Comments: **Yes.** Problem identification is within the Incident Management System. Trending may also be provided on requests using the PPMS application.

Configuration Management

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

Comments: **Yes.** The fulfillment module functions like the incident module. CMDB data may be integrated to the fulfillment record at the time the record is created or, if inventory is entered toward the fulfillment.

Request Fulfillment Management

Service Catalog Management

1. Does the tool provide linkage between Service Request records and the Service Catalog?

Comments: **Yes.** The “Service Catalog” is linked on the fulfillment record for reporting and tracking purposes.

VIEW SERVICE RECORD

Workflow Status [Not Initiated]

Service Record #: 213520 Contract #: 5999-000 Service Record Category: Request Catalog Service: General Support (Service Call Management) - No Price Option - Confirmed

Status: Remote Priority: 4 - Med/High QA Complete: NO Classification: None Time Zone: 0 Day: 1

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

POC: IT_Support Lookup Engineer: Select Opened: 12 23 2013 08 00

Financial Management

1. Does the tool facilitate billing or recover for services rendered (i.e.: Does it link to a financial tool or module)?

Comments: **Yes.** The tool is interfaced with Accounting systems, exports and imports data, and processes/presents financial reports.

Expenses and Income for a period per Project							
Project Selected: 8222-000							
Project Period Selected: 2013 / 7 - 2013 / 12							
Gross Margin Parameter:							
Project	Revenue	Direct Expenses	Indirect Expenses	Net Income	Gross Income	Net Profit %	Gross Profit %
8222-000		58	76	33			

2. Can specific Requests be created such that costing and billing is automated when they are fulfilled?

Comments: **Yes.** Contract-based accounting timesheets tracks billing time against contracts and tasks.

WORK HOURS BY PROJECT BY TASK BY RESOURCE		
For Time Sheet Period = [11/1/2013 - 11/15/2013]		
Project:8068-000 Depot Billing		
Task:Integration Billing for Depot (8068-000)		
Resource Name		Work Hours
Le, Hieu M.		0
Lin, Yi-Chiu		0
Su, Jackson		0
Thai, Tri B.		0
Tong, Eric		0
Task Hours:		0
Task:QA Billing for Depot (8068-000)		
Resource Name		Work Hours
Le, Hieu M.		0
Lin, Yi-Chiu		0.5
Su, Jackson		0
Thai, Tri B.		7.5
Tong, Eric		1
Task Hours:		9
Task:Repair Billing for Depot (8068-000)		
Resource Name		Work Hours
Le, Hieu M.		24
Lin, Yi-Chiu		0.5
Su, Jackson		0
Thai, Tri B.		25.5
Tong, Eric		0
Task Hours:		50

Request Fulfillment Management

3. Can the tool automate the recording and reporting of the ongoing costs of Request Fulfillment against particular cost centers, etc.?

Comments: **Yes.** Monthly Project financials provides ongoing costs to particular cost centers.

VIEW PROJECT FINANCIALS BY CATEGORY										
SUMMARY										
Project Name:		Project Status: Active			Project Category: Unassigned			Project Type: Unassigned		
Contract #:		Project Description:								
SCHEDULE										
Planned Start Date: 1/1/2004 12:00:00 AM				Actual Start Date: 1/1/2004 12:00:00 AM						
Planned End Date: 10/14/2011 12:00:00 AM				Actual End Date:						
				Project Duration: 2031 Days						
EARNED VALUE MEASUREMENTS - PART I [CONTRACT TO DATE VALUES]										
Category Item	Projected to Date	Actual to Date	Projected % to Completion	Actual % to Completion						
Schedule Progress (in Days)	1681	1681	82.77	139.57						
Total Cost	352740.00	5132115.79	60.07	0						
Net Margin	888000.00	6642481.67	41.7	311.55						
Labor Hours	0	14724.50	82.77	42.24						
Labor Cost	91240.00	773490.68	65.58	989.94						
Material Cost	296000.00	1475620.47	57.41	213.65						
Installation Cost	0.00	0	0	0						
EARNED VALUE MEASUREMENTS - PART II [AT YEAR END : 2008]										
Category Item	Projected to Date	Actual to Date	Projected to Date	Actual to Date						
Average Maintenance Labor Cost per Call:	274.01	75.06	Average Maintenance Labor Cost per Installation:	0						
Average Material Cost per Call:	2117.65	155.40	Average Material Cost per Installation:	0						
Average Cost per Call:	166.94	1070.98	Average Cost per Installation:	2117.65						
FINANCIAL SUMMARY										
Select Year:	2008	GO	Select Month:	February	GO	Budget Percentage of Estimate: 1				
Cost Category Name	Enter value to set all future months for category items	System Predicted Estimate	Average Estimate Deviation Percentage	Estimated Current month	Budgeted Current month	Actual Current month	Variance Current month	Budgeted Year To Date	Actual Year To Date	Variance Year To Date
MATERIAL HANDLING COST	0.00			2,485.00	2,485.00	2,896.42	411.42	4,970.00	3,823.33	-1,146.67
MAINTENANCE LABOR COST	0.00			4,270.00	4,270.00	7,992.38	3,722.38	8,540.00	14,036.38	5,496.38
DIRECT LABOR COST	0.00			14,300.00	14,300.00	15,485.38	1,185.38	28,600.00	29,051.16	451.16
MAINTENANCE PARTS COST	0.00			33,000.00	33,000.00	23,583.02	-9,416.98	66,000.00	29,060.63	-36,939.37
CONTRACT REVENUE	0.00			166,000.00	166,000.00	190,325.41	24,325.41	332,000.00	356,195.23	24,195.23
NET MARGIN	0.00			74,000.00	74,000.00	94,041.57	20,041.57	148,000.00	192,353.78	44,353.78
FREIGHT COST	0.00			3,860.00	3,860.00	4,869.01	1,009.01	7,720.00	8,496.60	776.60
TRAVEL COST	0.00			0.00	0.00	515.50	515.50	0.00	575.00	575.00
COMMISSIONS	0.00			200.00	200.00	0.00	-200.00	400.00	200.00	-200.00
OTHER DIRECT COST	0.00			3,570.00	3,570.00	7,874.73	4,304.73	7,140.00	15,888.17	8,748.17
NATIONAL SUPPORT CENTER COST	0.00			3,312.00	3,312.00	3,078.04	-233.96	6,624.00	5,928.00	-696.00
INSTALLATION COST	0.00			0.00	0.00	0.00	0.00	0.00	0.00	0.00
EQUIPMENT COST	0.00			0.00	0.00	0.00	0.00	0.00	0.00	0.00
GOVERNMENT PROGRAMS COST	0.00			0.00	0.00	0.00	0.00	0.00	0.00	0.00
TEMPORARY SERVICES COST	0.00			0.00	0.00	0.00	0.00	0.00	0.00	0.00
INTERNATIONAL COST	0.00			0.00	0.00	0.00	0.00	0.00	0.00	0.00
FRINGE BENEFITS	0.00			6,000.00	6,000.00	5,605.67	-394.33	12,000.00	10,536.86	-1,463.14
OVERHEAD	0.00			9,100.00	9,100.00	10,790.95	1,690.95	18,200.00	20,283.52	2,083.52
GENERAL & ADMINISTRATIVE	0.00			11,525.00	11,525.00	13,622.74	2,097.74	23,050.00	25,361.80	2,311.80
CUSTOMER SATISFACTION	0.00			99.20	99.20	100.00	0.80	198.40	66.67	-131.73
NUMBER OF CALLS	0.00			65.00	65.00	51.00	-14.00	130.00	119.00	-11.00
Cost Category Name	Enter value to set all future months for category items	System Predicted Estimate	Average Estimate Deviation Percentage	Estimated Current month Average	Budgeted Current month Average	Actual Current month Average	Variance Current month Average	Budgeted Year To Date Average	Actual Year To Date Average	Variance Year To Date Average
COST PER CALL	0.00			990.00	990.00	1,887.92	897.92	990.00	240.18	749.82
COST PER INSTALLATION	0.00			0.00	0.00	0.00	0.00	0.00	0.00	0.00
Export To Excel Export To Word										
<input type="checkbox"/> Refresh Financial data										
Back Edit										

OPTIONAL CRITERIA

1. Can the requestor open a Service Request through the Service Catalog interface?

Comments: no

2. Does the tool provide email notifications to end users and other interested parties as the Request Fulfillment progresses?

Comments: **Yes.** "Notification Events" may be used to send alerts to any stakeholders depending on the "status" change of any field.

Request Fulfillment Management

3. Does the tool provide support for the coordination of back-end fulfillment across multiple other tools and processes (e.g.: Access Management process for access requests, Portfolio Management system for project or enhancement requests, and non-IT systems for requests such as facilities work orders)?

Comments: **Yes. CENTRE permits a user to issue Purchase Orders, Customer Orders, (for other equipment and services), place requests for access, initiate shipments, make Project Tasks, etc.**

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

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