

TNA ITSM Toolkit User Stories

User stories describe a user and the reason why they need to use the service.

The following users have been identified for the ITSM Tool:

Product Manager	Service Desk Manager
Senior User	Service Desk Team Leader
Users/System Administrators	Service Desk Analyst
Workflow Queue Owner/ Resolution Manager	Infrastructure Manager Infrastructure Administrator Business System Manager Business System Administrator IT and Cyber Security Manager IT Security Officer Change Manager Configuration Manager Service Delivery
Task Owner/Approver	HR Administrator Facilities Manager DRI Team 3 rd Line/System Development
All TNA staff	Requestor/End user

Each User story is used to:

- Track everything they need to do
- Think about their work from a user’s perspective
- Discuss their work with colleagues
- Prioritise their work

These user stories will follow this format:

“As a... [Who is the user?]

I need/want/expect to... [What does the user want to do?]

So that... [Why does the user want to do this?]

Followed by specified **‘Conditions of Satisfaction’**.

Ref	As a....	I need/want/expect to....	So that...
Itsm1	Service Desk Manager	Offer a solution which is easily accessible to our network (remote and onsite) users regardless of profile (i.e. Thin Client, Desktop).	The service is standardised and all TNA staff can access the same high quality service and expect the same performance and functionality.
<p>Conditions:</p> <ol style="list-style-type: none"> 1. The solution proposed by the supplier MUST be readily capable of integrating within the existing TNA technical architecture and 3rd party tools (See Appendix Below). 2. The Solution MUST demonstrate and follow good security practices appropriate for a system hosting Government data up to OFFICIAL-SENSITIVE - so that the confidentiality, integrity and availability of our system and its data can be assured. 3. The solution MUST support up to 30 concurrent agents across TNA with an average of 17 users logged in at any one time. In addition, over 600 concurrent end-users will require access through a self-service portal. 4. The solution MUST not require installation of associated client software, such as flash player. 5. The solution MUST be accessible to network users via the TNA intranet (Confluence) incorporating Single Sign-On (SSO) with the TNA directory service (Microsoft Active Directory). 6. The solution MUST meet accessibility standards such as those outlined by the Web Content Accessibility Guidelines (WCAG) 2.0. 7. The solution MUST include service continuity arrangements that meet TNA's requirements. 8. The solution SHOULD be capable of integrating with TNA's existing ITSM Tool (Richmond) for the purpose of automating the migration of any live tickets and specified legacy information. 9. The solution COULD allow segregation of data in the event of other TNA departments wishing to set up an 'account' using the solution for their own purposes other than IT Service Management. 			
itsm2	Service Desk Manager	Incur the majority of cost in 16/17 financial year.	The Service Desk can transition smoothly to the new solution within 3 months, following contract agreement.
<p>Conditions:</p> <ol style="list-style-type: none"> 1. The supplier MUST detail how they will assist in the transition from the old to the new system. 2. The supplier MUST detail as a minimum; levels of support, times of support, costs, response and fix times and escalation options. 3. The supplier MUST provide full details of maintenance and support options, 			

	<p>including renewal options.</p> <p>4. The solution MUST be flexible enough to scale to meet increased capacity of 25%, performance and availability requirements. Please provide specific details on scalability, including cost implications and any impact on infrastructure.</p>		
Itsm3	Service Desk Manager	To offer my customers an innovative, modern IT Service Desk.	I can support TNA's strategic initiatives such as mobile working and digital by default processes.
	<p>Conditions:</p> <ol style="list-style-type: none"> 1. The supplier SHOULD detail any innovative functionality that offers benefit to TNA end users above and beyond the must and should conditions/requirements detailed for example web chat, process automation etc. 2. The supplier SHOULD detail how these innovations offer value for money and added benefit to TNA users. 		
	As a....	I need/want/expect to....	So that...
Itsm4	Service Desk Team Leader	Have visibility of the workload of all licenced users across the team (IT Operations) such as Requests, Problems, Events and Tasks logged in the system.	<p>I can monitor the workload and performance of the Service Desk in real time against agreed SLAs.</p> <p>I can provide evidence for changes identified for continuous improvement (CSIs).</p> <p>I can categorise and allocate new requests evenly across the team according to current priorities.</p>
	<p>Conditions:</p> <ol style="list-style-type: none"> 1. The solution MUST provide a comprehensive Service Level Management facility that tracks performance against best practice standards, for example, create alerts for logged incidents based on criteria such as call volumes, priority users and SLA breaches. 2. The solution MUST allow Service Level Management information to be displayed via a display screen, a monitor for example. 3. The solution MUST provide a standard suite of reports and allow specified users to create customised Management Information reports or Dashboards as required, for example, problem statistics, trend analysis and customer survey feedback, in an easy to use manner. 4. The solution MUST have the facility to assign SLAs to tickets automatically based on predefined criteria, such as number of users affected and impact. 5. The solution MUST allow for public holidays and other non-working days to be 		

	<p>accounted for when calculating SLA targets and other time dependent fields.</p> <p>6. The solution MUST allow the tailoring of individual dashboards/screens to help with service desk productivity and prioritisation.</p>		
Itsm5	Service Desk Team Leader	Have the ability to manage global administration and make configuration changes.	I can make any changes to the administrative facility as required by TNA e.g. global organisational changes, additions and amendments.
<p>Conditions:</p> <ol style="list-style-type: none"> 1. The solution MUST incorporate role-based authentication, allowing different levels of access based on job role/title, etc., driven from a link to MS Active Directory. 2. The solution MUST provide a user-friendly administration facility interface that TNA staff can access. 3. The solution MUST provide the facility to amend or create new workflows and associated business rules. 4. The solution MUST follow standard user administration procedures such as 'lock out' if a user tries to login unsuccessfully a predetermined number of times. 5. The solution SHOULD allow a service desk operative to assist a user resetting their password without compromising the user's access information. 6. The solution MUST include a separate 'sandbox/NLE environment' to develop any configuration updates, enhancements, prior to release in the live environment. 			
	As a.....	I need/want/expect to....	So that...
Itsm6	Service Desk Analyst	Create items such as incidents, Change Requests, Catalogue requests, Releases, Problems and Tasks and categorise the ticket as required for MI purposes.	I can record all the relevant details of a request and management information is recorded.
<p>Conditions:</p> <ol style="list-style-type: none"> 1. The solution MUST allow for the scheduling of regular BAU Maintenance or tasks at predefined time periods such as daily, weekly, monthly operational checks. 2. The solution MUST differentiate between the various categories, for example, an incident and a request 3. The solution MUST allow a request to be categorised and assigned to a pre-defined workflow with associated SLAs and process steps. 4. The solution MUST allow electronic documents to be attached to all record types. 5. The solution MUST allow for linking across all record types. For example, multiple Incidents to a Release or a Change Request to a Project. 6. The solution MUST support hyperlinks in any field, including links to external document stores. 			

	<p>7. The solution MUST have the facility for agents to view a user’s request history.</p> <p>8. The solution MUST provide the ability to import and export data from various sources into, and out of, the system on a regular and ad-hoc basis, for example CSV or Excel files attached to tickets.</p> <p>9. The solution MUST allow Service Desk Analysts to search for previously resolved tickets using key words and requester details.</p> <p>10. The solution COULD allow the population of the call logging screen direct from the ACD system using CTI telephony.</p>		
Itsm7	Service Desk Analyst	Record all of the activities to progress an incident and request to resolution.	I can track progress, escalate delays and update the requester on progress.
	<p>Conditions:</p> <ol style="list-style-type: none"> 1. The solution MUST provide the ability to “stop the clock” according to a pre-defined customisable conditions. 2. The system MUST recognise an update for an existing ticket when the customer emails in response to a request for additional information or to chase for an update. 3. The solution MUST allow for automatic notifications to be sent throughout the life of an incident, request, change, configuration item, etc. Notification groups may include IT staff, customers and third parties. 4. The solution MUST allow an agent to email a user from the ticket and keep a record associated to that ticket including any attachments and/or knowledge articles. 5. The solution MUST allow for major incidents and related calls to be automatically updated and resolved based on predefined customisable criteria and generate a notification to all affected users. 		
Itsm8	Service Desk Analyst	Assign requests to specific Action/Task owners	I can request the appropriate approval/guidance and track the task to fulfilment.
	<p>Conditions:</p> <ol style="list-style-type: none"> 1. The system MUST enable analysts to assign tasks associated to a ticket to appropriate workflow task owners and monitor, track and audit progress against agreed SLAs. 2. The solution MUST allow the Service Desk to escalate requests by assigning the responsibility for the tickets to the appropriate Resolution Manager workflow. 3. The solution MUST send reminders to action owners to warn of a SLA breach. 		
Itsm9	Service Desk Analyst	Record the resolution of a request	I can resolve the ticket and inform the end-user. Record the resolution for future

			enquiries/knowledge transfer and MI purposes.
	<p>Conditions:</p> <ol style="list-style-type: none"> 1. The solution MUST allow for 2-step closure of incidents and service requests workflow, i.e. a ticket can be marked as 'Resolved' but cannot be closed until the requestor has confirmed they are happy to close the ticket. 2. The solution MUST retain a record of incident and problem ticket resolutions in a 'Knowledge Base' accessible to IT Operations staff. Any entries must be approved for publishing to 'live' by the Service Desk. 3. The solution MUST allow agents and end users to search the Knowledge Base from the intranet/portal site (and for IT staff only, from within the toolset). 4. The solution MUST provide an audit trail of solution amendments. 5. The solution SHOULD allow the knowledge base to record a 'resolved item', if a solution has been successfully accepted by a user. 6. The solution MUST allow links to external references such as other websites, internal and external and hyperlinks. 7. The solution SHOULD allow global text changes to be applied to the Knowledge Base, for example, department name change. 8. The Knowledge Base COULD have the facility to identify duplicate solutions/entries. 9. The Knowledge Base SHOULD be capable of importing external knowledge solution information. 10. The Knowledge Base SHOULD proactively suggest possible solutions to users whilst searching. 11. The solution SHOULD support the creation of 'How To' videos and scrolling alert messages. 		
	As a.....	I need/want/expect to....	So that...
Itsm10	Resolution Manager/Task Owner/Approver	Receive an alert for any tickets that require action as a stakeholder to the specific workflow process	I can respond to the request and meet the agreed response SLA.
	<p>Conditions:</p> <ol style="list-style-type: none"> 1. The solution MUST allow tickets to be transferred to Resolution manager's workflow queues. 2. The solution MUST provide workflow alerts to Resolution Managers and the Service Desk analyst (within IT Operations) providing full detail of the status and progress of the ticket. 3. The system MUST allow the Resolution Manager to accept or reject the ticket/task and automatically update the status of the ticket. 4. The solution MUST request that the resolution manager provide a record of the solution and this is stored in the Knowledge Base. 5. The solution SHOULD flag any undelivered messages. 		
	As a.....	I need/want/expect to....	So that...

Itsm11	Change and Release Manager	Store and catalogue all change requests, including all the standard ITIL fields and supporting documentation.	I am prepared for the Change Approval Board. I can prioritise requests with the business, schedule change releases understanding the impact on end users.
<p>Conditions:</p> <ol style="list-style-type: none"> 1. The solution MUST allow the creation, amendment and deletion of decision and mandatory tasks. 2. The solution MUST allow each change request to have a reportable and searchable status, such as closed/open/on hold. 3. The solution MUST be capable of managing a Release and Deployment schedule that integrates with the Change schedule 4. The solution COULD provide an automated forward schedule of change calendar that can be published in the TNA Intranet 5. The solution SHOULD provide an automated Emergency Change Request handling system. 6. The solution SHOULD be capable of producing an impact analysis of Release and Deployment on all configuration items (incl. impacts on incident; problem; CI; catalogue and portfolio management). 7. The solution SHOULD be capable of managing a complete change schedule including providing the ability to impose and manage constraints on workflows/scheduling. 8. The solution SHOULD allow for the recording of release notes. 			
<p>As a..... I need/want/expect to.... So that...</p>			
Itsm12	Asset and Configuration Manager	Record and track all the assets held by TNA and ensure stocks are sufficient.	I can track assets and the relationship between CIs, monitor the spend on IT assets and how they are used by TNA. I can proactively manage licencing and assets.
<p>Conditions:</p> <ol style="list-style-type: none"> 1. The solution MUST be capable of recording and displaying the relationship and dependency between CIs. 2. The solution MUST provide a configuration management database to allow for all configuration items, sub-items and associated items to be created and updated in a controlled manner and from a variety of sources. 3. The solution MUST be capable of management of all aspects of Software Asset management. 4. The solution MUST be capable of managing the software media, licence and authenticity documentation, including recording of origin of software (incl. links) and self-service store for access to assets. 5. The solution MUST integrate purchasing and transfer with the CMDB, adding new 			

	<p>configuration items to the database on purchase/transfer, including all associated warranty, service and licensing information.</p> <ol style="list-style-type: none"> 6. The solution SHOULD have a graphical representation of configuration items that have a relationship. 7. The solution SHOULD be able to reconcile the definitive software library with what is deployed and provide a reporting output to view compliance with licensing. 8. The solution SHOULD be capable of tracking and monitoring the software components through all stages of their lifecycle. 9. The solution SHOULD update dynamically from the Service Catalogue. 10. The solution SHOULD either be able to hold or link to a TNA system, details of third party suppliers that support TNA services, as well as hold a software asset license database. 11. The solution SHOULD support passive monitoring of, and (automated) active intervention, in software license compliance including supporting the identification of unused licenses, trigger alerts/interventions against expiring licenses and identify non-compliant installations in a mixed environment of licenses for single products and suites/packages. 12. The solution COULD allow for cost information to be recorded against configuration items. 		
Itsm13	As a.... End User	I need/want/expect to.... Be able to raise a Change/Service Catalogue Request or log an Incident/Problem online, manage and view my account and read FAQs/knowledge base articles	So that... I do not need to phone or attend Service Desk in person.
	Conditions: <ol style="list-style-type: none"> 1. The solution's end-user interface MUST be customisable to meet TNA branding and accessibility guidelines and standards. 2. The solution MUST provide a comprehensive Service Catalogue Management function to ITIL 2011 standard, comprising both Business Services (a database of live/deployable services visible to customer) and Supporting Services (visible to IT services). 3. The solution MUST enable users to raise a Change or Service Catalogue request using a web template available on the web based portal. 4. The solution MUST enable users to log an Incident or Problem ticket using a web template available on the web based portal. 5. The solution SHOULD direct the user to the Knowledge Base search before they can register an Incident or Request. 6. The solution MUST allow for the customisation of all request forms, including making fields mandatory, tooltips, changing field titles, etc. 7. The solution MUST track any requests against specified SLAs. 8. The solution MUST be able to auto-populate user information for incidents and 		

	<p>requests, to minimise input from service desk agents.</p> <p>9. The supplier SHOULD provide details which demonstrate how they maintain their skills and knowledge of future releases of assistive technology.</p> <p>10. The solution SHOULD be capable of displaying hot fixes and tips directly from the knowledge base and or service desk system to the end user portal.</p> <p>11. The solution search function SHOULD have the facility to create relationships between terms. E.g. Outlook = Email.</p> <p>12. The solution SHOULD allow users and agents to log, view, update and close calls from a mobile device.</p> <p>13. The solution COULD allow for web chat.</p>		
Itsm14	End User	Be able to feedback on the performance of the IT Service Desk in relation to the specific request online.	I can provide timely feedback on the experience I received, flag any concerns and suggest any improvements to the service.
	<p>Conditions:</p> <ol style="list-style-type: none"> 1. The solution MUST generate an online customer survey based on pre-defined customisable criteria. 2. The solution MUST allow the Service Desk to choose when to automate sending the survey and the ability to send manually. 3. The solution SHOULD alert the Service Desk Team Leader of any extreme customer survey results i.e. if a customer was dissatisfied with the service associated with a problem ticket. 		
Itsm15	End User	Perform low level administrative tasks online.	I do not need to log a request with the Service Desk and I can 'self-serve' at my convenience (out of hours, weekends etc).
	<p>Conditions:</p> <ol style="list-style-type: none"> 1. The solution SHOULD allow users to reset their network password without the intervention of the helpdesk according to TNA processes. 2. The solution SHOULD automatically record a successful and/or unsuccessful password reset as a [catalogue or incident?] request and if required, close the request automatically. 		

Appendix

Current Infrastructure

Server Infrastructure

The server infrastructure in scope currently consists of around 220 virtual machines and <100 physical servers. The vast majority of servers run Microsoft Windows (2003, 2008R2 and 2012R2) but there are also instances of Redhat and CENTOS.

All virtual machines run on Microsoft Hyper-V 2012R2.

Services are currently monitored using Microsoft System Center Operations Manager 2012R2. Server configuration management and patching is managed through Microsoft System Center Configuration Manager 2012R2.

It is possible that the potential solution may contain elements of these products and we are open to potential replacement or integration where possible.

Client Devices - TNA currently has a mixed state of client devices including:

- Desktop computers running Microsoft Windows 7 Pro
- Laptop computers running Microsoft Windows 7 Pro
- Small Form Factor computers running Microsoft Windows 7 Pro
- Thin computers running Windows Embedded O/S connecting to terminal services on Server 2008 R2
- Chip PC thin client computers running Windows CE 5.5 connecting to terminal services on Windows Server 2012 R2
- iPads managed through Airwatch
- Blackberry mobiles managed through Blackberry Enterprise Server

TNA is also currently looking at deploying a model office of Windows 10 builds.

User types and Profile - There are 2 user types: corporate and public.

For corporate users, TNA uses Active Directory to manage their user profiles and some users have a mixture of local and roaming profiles for legacy purposes.

For public users, TNA uses mandatory profiles managed with Active Directory. There is one mandatory profile per public access-point terminal (thin client) and this is completely transparent for the public users. A mandatory user profile is a special type of pre-configured roaming user profile that administrators can use to specify settings for users. With mandatory user profiles, a user can modify his or her desktop, but the changes are not saved when the user logs off.

Therefore, the solution will have to integrate with Active Directory, in both its Windows Server 2008 R2 and Windows Server 2012 R2 versions, using a roaming-

profile solution with the possibility to manage some exceptions, especially for corporate users.

Secure Authentication

The solution will have to be able to support a dual-factor authentication which could consist of a set of credentials and an OTP (One-Time Password) device, or a certificate.

Devices to be supported

TNA currently has a mixed state of client devices including:

- Desktop computers running Microsoft Windows 7 Pro
- Laptop computers running Microsoft Windows 7 Pro
- Small Form Factor computers running Microsoft Windows 7 Pro
- Thin computers running Windows Embedded O/S connecting to terminal services on Server 2008 R2
- Chip PC thin client computers running Windows CE 5.5 connecting to terminal services on Windows Server 2012 R2
- iPads managed through Airwatch
- Blackberry mobiles managed through Blackberry Enterprise Server
- TNA is also currently looking at deploying a model office of Windows 10 builds.

When connecting through a corporate access type, corporate users can only do so from a TNA device. But when connecting remotely, corporate users can either use a TNA device or their own personal device.

Public users use public access-point terminals which are thin clients provided by TNA and set up in the reading rooms.

The solution will have to be compatible with all these device types and provide a consistent and seamless user experience.