Introduction

The Information Technology Infrastructure Library (ITIL) aims to improve the management of IT services within the organization, for lowered costs, improved efficiency and productivity. But like any organizational implementation, ITIL can be difficult to integrate into the existing organizational processes and infrastructure, particularly for organizations with disparate systems.

Tracker Suite® offers organizations the opportunity to utilize a core component of their IT infrastructure, their Lotus Notes / Domino messaging system, to structure the procedures outlined by ITIL. By leveraging infrastructure and presenting users with a familiar and easily adopted interface, Tracker Suite is a comprehensive, low cost ITIL facilitator.

What is ITIL?

The Information Technology Infrastructure Library (ITIL) is a framework of best practice approaches that claim to facilitate the delivery of high quality information technology (IT) services. ITIL outlines an extensive set of management procedures that are intended to support businesses in achieving both quality and value for money in IT operations. These procedures are supplier independent and have been developed to provide guidance across the breadth of IT infrastructure, development, and operations.

Although developed during the 1980's, ITIL was not widely adopted until the mid 1990's. Proctor & Gamble, which installed an ITIL framework in the late 1990's, realized a savings of a $500,000,000 within 4 years. Martin Cohen, then manager of global service management at Procter & Gamble, said "It all comes down to the fact that IT is an integral part of supporting the business. When IT processes are done by 5,000 people consistently across one company, service management can deliver tremendous savings."

The ITIL framework consists of eight disciplines:

1. Service Support
2. Service Delivery
3. Application Management
4. Planning to Implement Service Management
5. Security Management
6. ICT Infrastructure Management

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Tracker Suite and ITIL

Tracker Suite's modules for project management help desk services, asset tracking, and personnel management (Project Tracker™, Support Tracker™, Asset Tracker™, and Personnel Tracker™, respectively) in combination with the reporting capabilities of the Tracker Data Warehouse™, greatly facilitate the Service Support, Service Delivery and Application Management disciplines, and to a lesser degree assist in the implementation of the others.

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Service Support

The Service Support ITIL discipline focuses on ensuring that users have access to the services they need to work effectively, and are not inhibited by broken operations caused by failures or change, poorly planned releases of new IT technology or inadequate provisioning.

This requires:

1. A **Service Desk** - An accessible means to support services.

2. **Incident Management** - A process to restore a broken operation,

3. **Problem Management** - A process to solve an incident, and reduce or eliminate its recurrence.

4. **Configuration Management** - A procedure for managing and tracking assets, both hardware and software

5. **Release Management** – A procedure, similar to Configuration Management, but focusing on automated distribution of software and hardware, including license controls across the entire IT infrastructure.

6. **Change Management** - Standardized methods and procedures for efficient and prompt handling of all changes, in order to minimize the impact of change-related incidents upon service quality, and consequently improve the day-to-day operations of the organization.
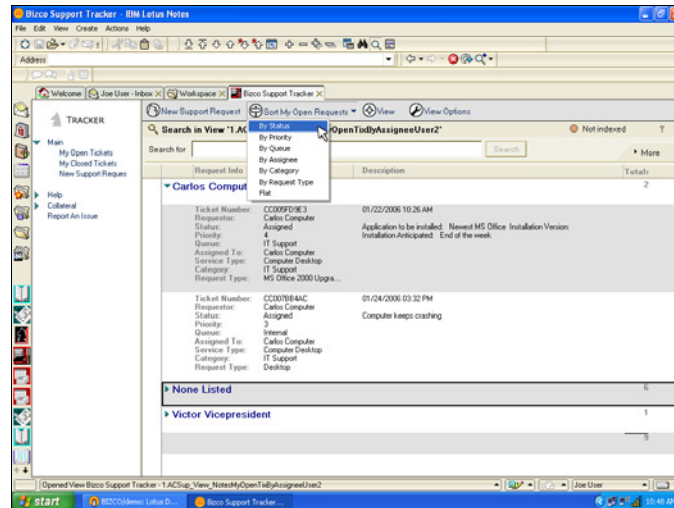
Tracker Suite and the Service Desk

The Service Desk is the contact point for users to report their problems, check the status of their current requests and also review current news and announcements regarding service events, news and actions.

An effective Service Desk is accessible and easy to use. Support Tracker fulfills these requirements, by offering access to these resources and tools within Lotus Notes or through a Web portal.   With Support Tracker, IT departments can deploy Web accessible support pages, with functions including reporting, FAQ, discussions, system news and more.

Users can also email support requests to addresses configured within Support Tracker. When the emails are received, they are automatically converted into support tickets and placed in an appropriate queue. An organization with multiple offices could configure *net-EastOffice@sample.com* and *net-WestOffice@sample.com* as email address for network issues.

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As well as simplifying reporting, the service desk must also make it easy for requestors to stay informed regarding their service issue.

Reviewing Tickets in Lotus Notes

Tracker Suite allows users to review the status of their support requests through Notes or the Web. For organizations providing a Service Desk to external customers, Support Tracker's integration with Customer Tracker™ provides Web access to designated customer contacts to review the status of their tickets.

Tracker Suite and Incident Management

The primary goal of incident management is the restoration of services as rapidly as possible, and the minimizing of impact on the business. Incident management includes the detection and reporting of incidents, their classification, initial support, investigation, resolution & recovery, closure, and finally their ownership, including monitoring, tracking and communication.

Typical incidents include application bugs, hardware and service failures. Critical incidents or multiple incidents with common symptoms become the province of Problem Management.

As discussed in the previous section, Support Tracker simplifies the reporting of incidents, allowing users to report incidents through Lotus Notes, the Web or email. Support Tracker also provides an intelligent, automated workflow for incident management which ensures a timely response to incidents, proper

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classification and assignment weighting in line with standing SLAs, and provides a rich environment for incident investigation and management. Support Tracker also features ticket aging and escalation structures to ensure tickets are dealt with in a timely fashion.

Once a support ticket is submitted, it is routed and assigned based on its request type (Bug, Install Software, Desktop, Hardware, etc.), as well as by any SLAs configured in Support Tracker.
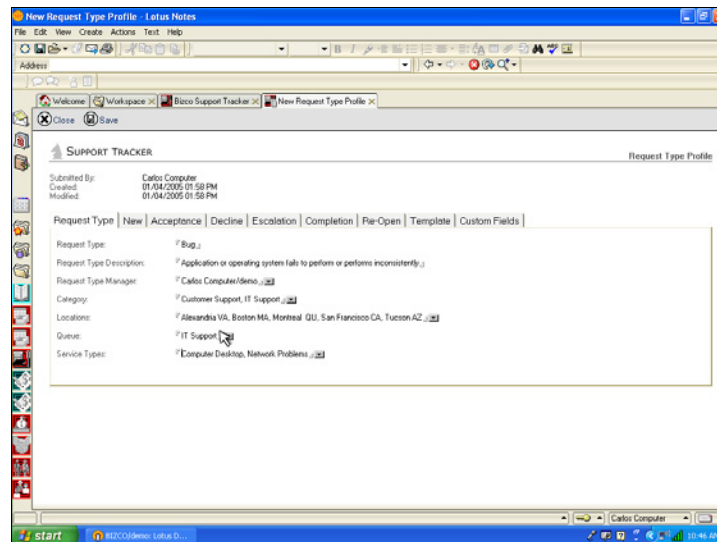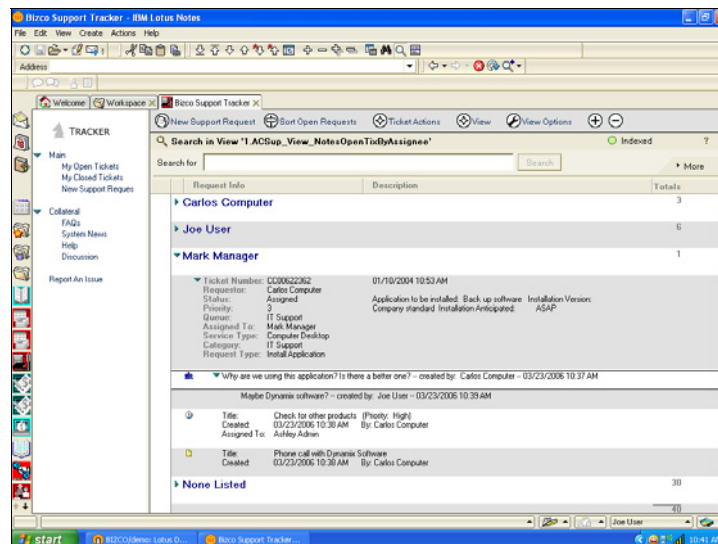

Configuring Request Types

Once a ticket has been assigned, the assignee receives an automatic notification via email, with a link to the ticket.
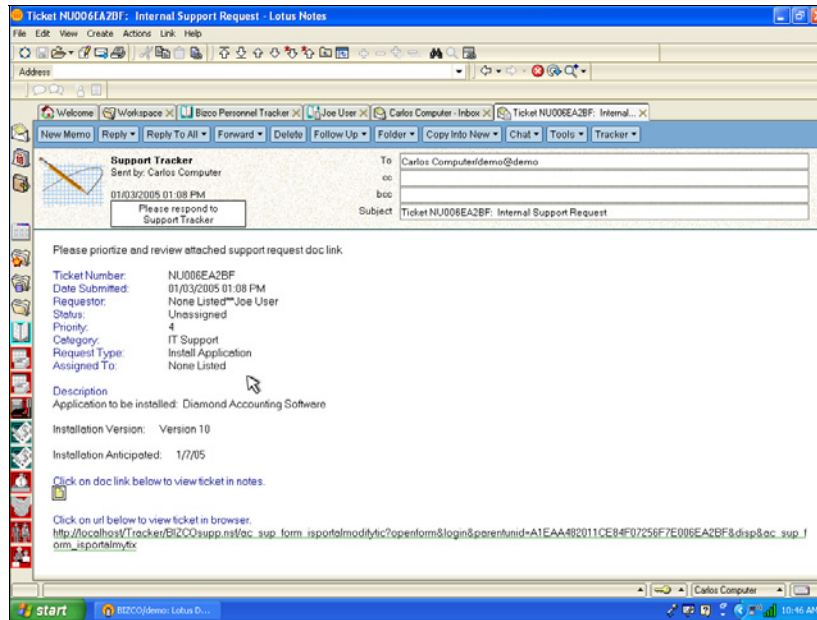
Automatic Notification with Doclink

As work on the ticket progresses, any communications regarding the issue including phone calls, notes, emails and online discussions, can be attached to the ticket, due to Support Tracker's response-document structure. This centralization of information facilitates communication for the users involved and speeds the investigation.
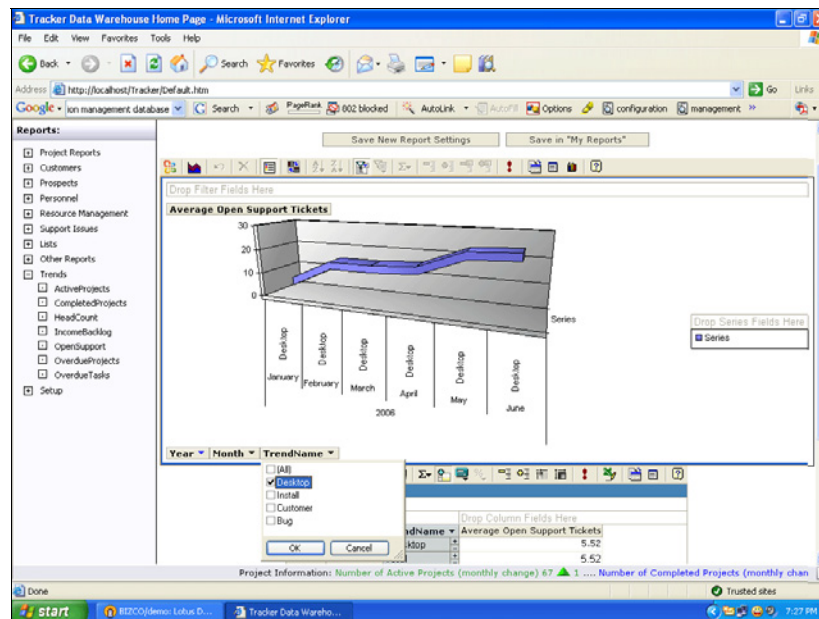

Support Ticket Discussion

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As well as specific ticket discussions, Support Tracker also provides a general discussion area for support issues.   When the incident is resolved, a notice is sent to the original requestor for acceptance of closure and commentary. Closed tickets are archived for later review, and can also be added to the system FAQ for use as a quick, first-line fix should the incident arise again.

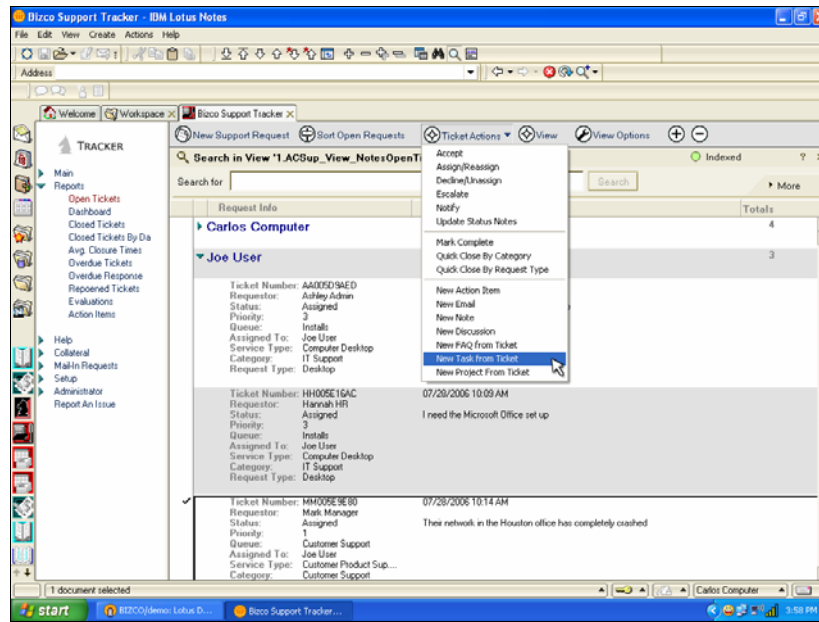## Tracker Suite and Problem Management

When an incident is a critical breakdown in operation, or if multiple incidents with similar symptoms are observed, then a Problem record is created. "Problems" are managed differently than incidents. When a work-around has been developed for an identified problem, that problem is classified as a "known problem", and when the cause of the problem is identified, it becomes a "known error". In the case of a known error, a Request for Change (RFC) maybe be submitted to eliminate the error by modifying the system, which is the province of the "Change Management" ITIL discipline.

Both the Tracker Data Warehouse and Support Tracker provide reports and views to identify problem. The Tracker Data Warehouse is a Web based reporting engine, with a wide array of reports as well as a report editor for the creation of new reports. Using reports such as Open Ticket Trends and Ticket Pies, organizations can get a high-level perspective of their support services and identify problem areas for review.

Ticket Trends Report

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If a particular problem is identified, and review of the closed support tickets reveals a common work-around, this can be posted in the FAQ. If the problem analysis reveals the root cause of the problem, making it a "known error", the associated ticket can be rolled into a project or project task in Project Tracker, and the Change Management process can begin.
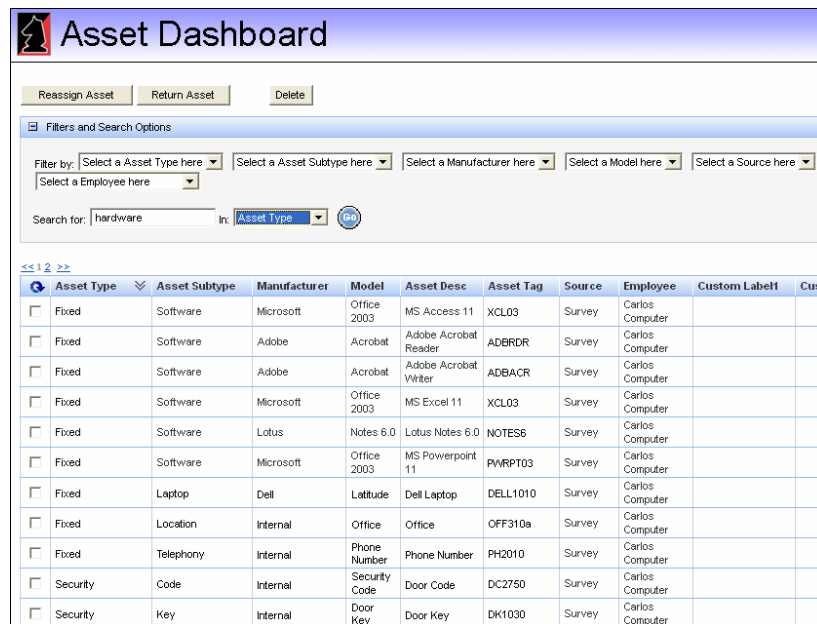

Converting Tickets to Tasks

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Tracker Suite and Configuration Management

Configuration Management is a process that tracks all of the individual Configuration Items (CI) in a system. A CI can be any component of an IT Infrastructure which is subject to formal change control, including software, hardware and documentary items such as SLAs.

Configuration Management includes creating and regularly auditing a database of all CIs in the system, defining their relationship, tracking their status and history, and monitoring all RFCs to the system.

Tracker Suite's modules for purchasing, asset and personnel management provide functions for Configuration Management. These modules are Purchase Tracker, Asset Tracker and Personnel Tracker, respectively.

Purchase Tracker controls the procurement of CIs, as well as monitoring their reception. Once received, the item can be imported into Asset Tracker, where they can be labeled and assigned as needed, and stored in a searchable asset catalog. Through the lifecycle of the asset, its status can be tracked through Asset Tracker as a history of its assignments, issues and repairs is recorded.

Asset Catalog

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As well as importing newly procured assets from Purchase Tracker, Asset Tracker also automates the auditing process as well with its Survey function. The Survey emails a form to every user in the organization to complete to report their assets. Once received, the Survey automatically detects the recipient's operating system, hardware statistics and installed applications and includes them in the report as well.

Asset Tracker Survey

In the case of documentary CIs, Tracker Suite's integration with Lotus Notes enforces read/write/edit privileges on all documents, as well as version control. In addition, activity logs track all document activity and edits.

Release Management and Change Management with Tracker Suite

Change Management and Release Management share the same purpose, the minimizing of potential impacts on service from adjustments to process, hardware and/or software, and providing an established plan of action to manage these transformations. Because of this overlap, their enablement through Tracker Suite will be discussed together.

Release Management is used for platform-independent and automated distribution of software and hardware, including license controls across the entire IT infrastructure. The purpose of release

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management is to minimize the impact of new deployments in the live environment by providing a structure to the deployment process, with strict control of both the software and hardware. In this way, the delivery of licensed, tested and version-certified software and hardware is ensured.

The goals of Release Management include a plan for rollouts, procedures for distribution and installation of changes to IT systems, effective communication with the customer and management of their expectations, and finally control of the distribution and installation of changes to the IT systems. These goals require a means to manage the assets being deployed, and a structured workflow to accomplish the deployment

Change Management, on the other hand, is used to minimize the impact of changes to the IT infrastructure itself and the potential Incidents caused by such changes. These changes can be driven in response to Problems, or by external requirements including legislation, such as Sarbanes Oxley. They can also be caused by internal initiatives for improved efficiencies or productivity. The Change Management ITIL discipline calls for the establishment of procedures and processes to facilitate changes promptly and efficiently.

As with Release Management, Change Management requires thorough planning, open communication and firm control in order to minimize its impact. Change Management is concerned with delivering effective change, as well as identifying and halting detrimental change.
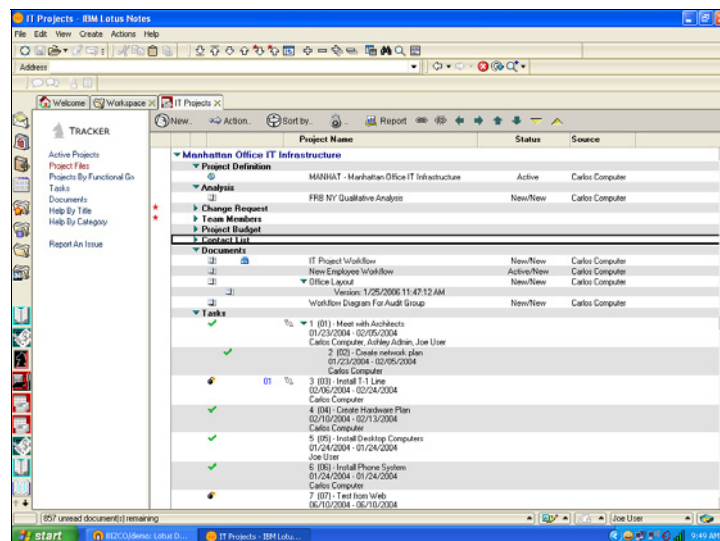
Managing Change as a Project

Tracker Suite's project management module, Project Tracker, helps organizations to plan and structure step-by-step deployment or change: defining goals and scope, status reporting and managing documents. Organizations can easily assemble logical, step-by-step plans using Project Tracker's WBS structure for tasks, with task linking and dependencies. Project Tracker also provides firm control over change / release projects, in the form of process tollgates. These tollgates ensure that the change / release is delivered in an orderly fashion, that each designated phase of the project is completed and signed-off on before the next can begin.
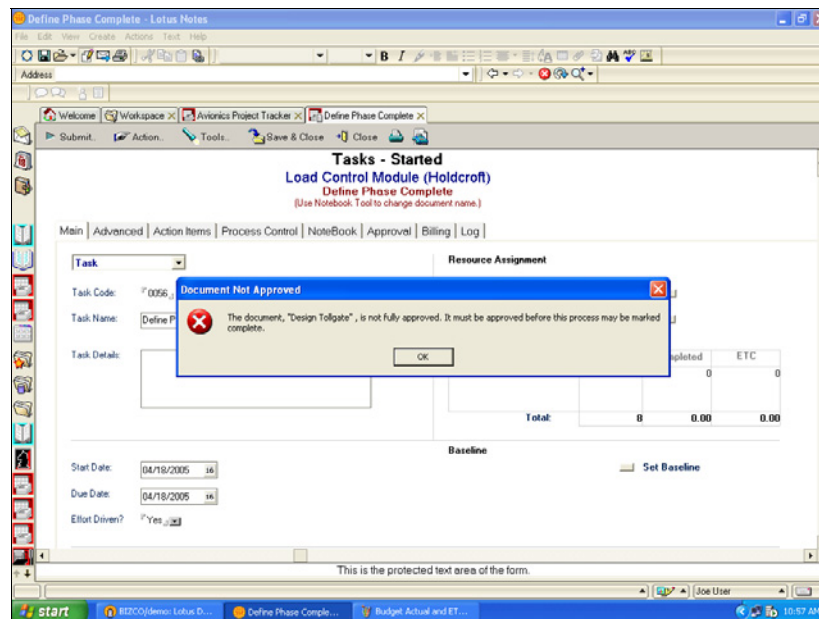
Process Tollgate

Service Delivery

The Service Delivery discipline has two areas. First, it focuses on the ensuring the adequate and cost-effective support of business users. Second, it drives the process of IT Service Continuity management, the development and maintenance of contingency plans to ensure the availability and rapid restoration of IT services in the event of disruption.

Tracker Suite's strength in this discipline rests in the first area. The Tracker Data Warehouse provides a wide array of reports to track and measure the performance and costs of IT services. The performance and cost areas that Service Delivery focuses on are:

1. **Service Level Management**: This is concerned with continuous identification, monitoring and review of the levels of IT services specified in the SLAs.

2. **Capacity Management**: This is concerned with optimizing the service level and cost-effectiveness of IT services by improving the matchmaking of IT resources to business demands.

3. **Availability Management**: This is concerned with justifying the cost of sustaining IT service to support the business.

4. **Financial Management for IT Services**: This is concerned with is responsible for budgeting for IT services, accounting for expenditure and where required implementing charging for IT services. Financial Management also assesses the Total Cost of Ownership and oversees activities in demonstrating value for money (VFM).

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Tracker Suite and Service Delivery

Utilizing the reports from the Tracker Data Warehouse, organizations can track their service performance. The reports each process can leverage include:

Service Level Management

    1.   Average Ticket Completion Time

    2.   Open / Closed / Escalated Tickets

    3.   Project Portfolio (for IT projects)

Capacity Management

    1.   Employee Capacity

    2.   Allocation by Resource

    3.   Allocation by Cost Center

Availability Management

    1.   Allocation by Employee

Financial Management for IT Services

    2.   Budget vs. Actual

    3.   Earned Value

    4.   Project Profitability

Open/ Closed/ Escalated Tickets

Earned Value Report

Allocation by Resource

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Application Management

ITIL Application Management set encompasses a set of best practices proposed to improve the overall quality of IT software development and support through the life-cycle of software development projects, with particular attention to gathering and defining requirements that meet business objectives.

Project Tracker's robust project management capabilities offer an excellent tools set for the development of projects. At a higher level, the IT portfolio management capabilities allow IT organizations to effectively manage multiple software development projects

IT Software Project Portfolio Report

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Planning To Implement Service Management

The purpose of this discipline is the alignment of business needs and IT provision requirements. While it describes the implementation or improvement of ITIL Service Management set, it can be applied to the other disciplines as well.

Project Tracker facilitates the implementation of ITIL projects, by offering a secure, central location for program documents: vision statements (the project definition), analyses and gap assessments, training documents, benchmarks, plans (communication, decisions, and stakeholder goals), and risk assessments. As well as managing program documents, Project Tracker's WBS supported task management system facilitates the mapping of work required to complete the improvement.

The Tracker Data Warehouse reports can be used to develop benchmarks, measure performance improvements, and identify quick wins.
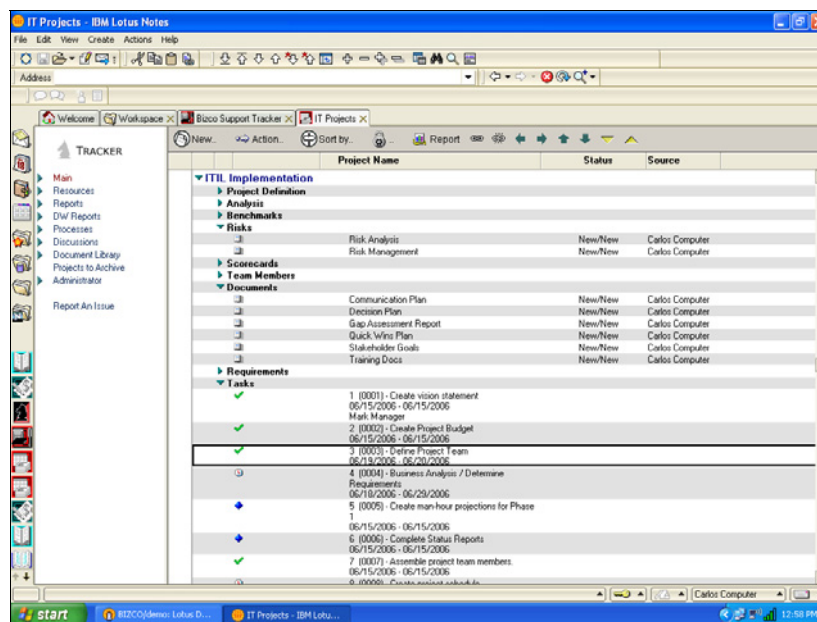
An ITIL Implementation Project

Security Management

This process is concerned with the security of information within the organization, its accessibility and its integrity. ITIL Security Management is based on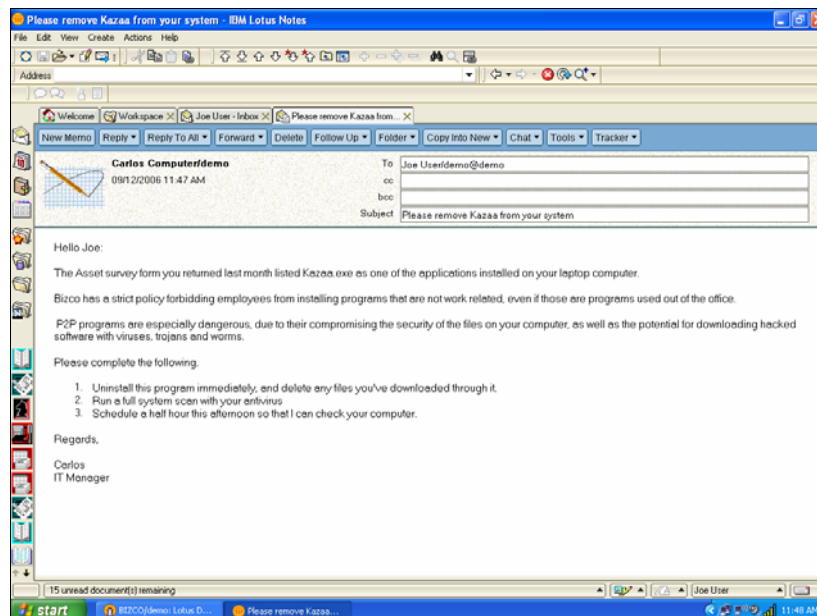 the code of practice for information security management known as ISO/IEC 17799. The primary goal of ITIL security management is to comply with the security requirements required by client SLAs.

Security Management and Tracker Suite

Tracker Suite can facilitate Security Management in three ways:

1) Controlled access to documents and files with Read/Write/Delete privileges.

2) Asset Tracker can be leveraged for the provisioning, tracking and collection of security assets, including security access codes, ID cards, computer accounts, and keys,

3) ITIL security management is also concerned with the handling of data as well as its storage. As secure as the structure may be, if the data is handled by software with design flaws, bugs or weak security, or by systems with unapproved and potentially malicious software installed, it is vulnerable to unintentional or illicit alteration, or theft. Utilizing Asset Tracker's Survey form, organizations can quickly catalog every application installed on every desktop within the organization, ensuring that these applications are known, approved, and licensed.

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ICT Infrastructure Management

This discipline is concerned with establishing best practices for requirements analysis, planning, design, deployment and ongoing operations management and technical support of an ICT Infrastructure. The Infrastructure Management processes involved include ICT Design and Planning, ICT Deployment, ICT Operations and ICT Technical Support.

Tracker Suite and Infrastructure Management

ICT Infrastructure Management, particularly the ICT Operations process, shares aspects of the Service Management in regards to Release Management and Incident Management, and can leverage Tracker Suite's applications in the same manner.

ICT Deployment provides a structure for the design, build, testing and deployment of projects within the infrastructure. While the last phase is tied with the Release Management discipline, the preceding phases share several project management disciplines with PRINCE2, a project management methodology.

In PRINCE2, planning is product-based and is driven by the business case of the project goal. Throughout the project lifecycle, this goal is reviewed to ensure the business objectives are still being met. Processes are defined with specific objectives and activities. Projects are divided into stages, and each stage is carefully monitored to ensure consistent progress. Project Tracker enables PRINCE2 methodology in 3 ways:

1. By clearly defining the project business case and goal in an accessible, secure project definition document.

2. By automating status report collection, ensuring the project is focused and that the goal and objectives are consistently reviewed against project progress.

3. By providing WBS based project templates and process tollgates, enabling the stage management required by PRINCE2.

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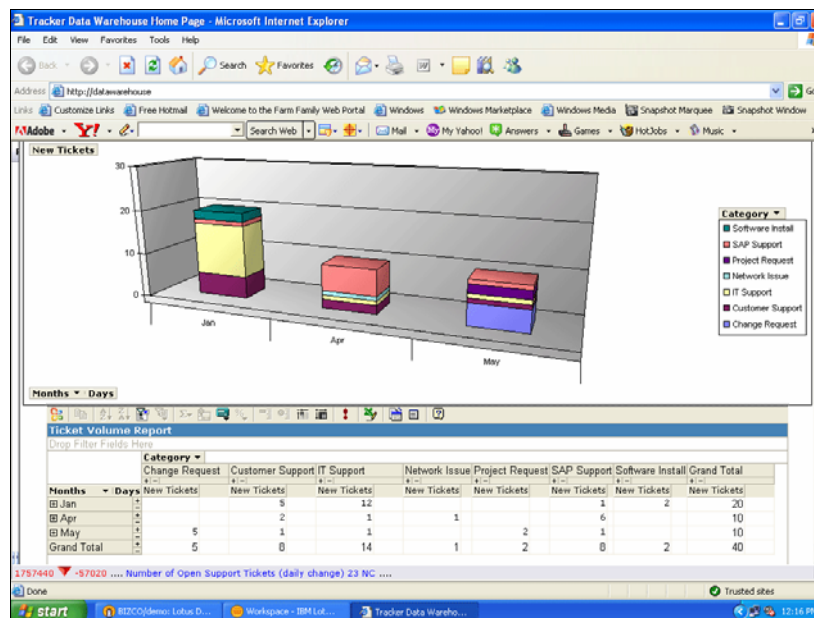
The Business Perspective

The purpose of the Business Perspective is to collect and promote best practices for IT services and IS management, such as for managing business continuity and improvement, managing change (at the business manager level), improving business practices and managing partnerships and outsourcing.

Tracker Suite and the Business Perspective

The Business Perspective is tied to the principles of IT Governance, which is concerned with the tracking, measurement and control of organizational routines and initiatives for the purposes of reducing costs, streamlining processes and increasing efficiencies, minimizing risks and providing a decision support system for effective, productive leadership.

Tracker Suite facilitates this level of control and tracking by consolidating major operational processes, including administration, projects and support, into a single system. This consolidation simplifies and streamlines the development of enterprise reports for informed decision making.

Ticket Bar Report

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Summary

There are clear benefit to establishing ITIL disciplines within the organization, in increased efficiencies, more organizational transparency, improved service and stability. However, the ITIL framework is also complex in its integration of project, support, asset and reporting process, and is a difficult endeavor particularly for larger organizations utilizing disparate systems to manage these processes.

Tracker Suite offers three compelling advantages to organizations using Lotus Notes, seeking to establish an ITIL framework:

1. **Painless integration with existing infrastructure:** Instead of fighting to install an ITIL framework on the organizational structure, Tracker Suite simply extends a core component of the organization's existing infrastructure- its Lotus Notes platform.

2. **Integrated processes:** Tracker Suite modules communicate with each other, which facilitates ITIL disciplines. For example, a ticket in Support Tracker for an Incident which is flagged as a Problem can be converted into a project task, or into a project itself, in Project Tracker.

3. **Reporting:** The goal of the ITIL disciplines, particularly Service Delivery, is maintaining a guaranteed level of performance. As ITIL crosses the division lines of the organization (projects, support and administration), developing cohesive reports from segregated departments and their systems can be difficult. The Tracker Data Warehouse, which gathers data from the various Tracker modules as well as legacy databases, provides a single point of access to up-to-date business intelligence, whether that is monitoring the effect of a change program on a department's help desk performance, or analyzing the earned value of software development projects.

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