



INFORMATION TECHNOLOGY SERVICE MANAGEMENT (ITSM) TOOL IMPLEMENTATION SERVICES

ATTACHMENTS 1 -3 BACKGROUND INFORMATION

Contents

ATTACHMENT 1 – ITSM PROJECT BACKGROUND INFORMATION AND CONTEXT	3
1 BACKGROUND	3
1.1 SHARED SERVICES SSC(SSC).....	3
1.2 SERVICE MANAGEMENT TRANSFORMATION.....	3
1.2.1 <i>Service Management Transformation Program Overview</i>	3
1.2.2 <i>ITSM Process Design Priorities</i>	4
2 ENTERPRISE ITSM TOOL PROJECT.....	5
2.1 CURRENT STATE	5
2.2 TARGET SOLUTION	7
2.2.1 <i>Vision for ITSM</i>	7
2.2.2 <i>ITSM Tool Project Objectives</i>	8
2.2.3 <i>Establishment of GC Standards</i>	8
2.3 ITSM TOOL INTEGRATION.....	9
2.3.1 <i>Current State</i>	9
2.3.2 <i>Future State</i>	10
2.4 ITSM TOOL SOLUTION IMPLEMENTATION STRATEGY.....	14
2.4.1 <i>Enterprise ITSM Tool Project Phase 1 – Implement ITSM Tool at SSC and Develop bi-directional Interface</i>	14
2.4.2 <i>Enterprise ITSM Tool Project Phase 2 – Expand the ITSM Tool at SSC and Onboarding of First Tenant</i>	14
2.4.3 <i>Onboarding of Additional Departments</i>	14
2.5 VOLUMETRIC DATA.....	15
2.5.1 <i>SSC ITSM Record Volumes</i>	15
2.5.2 <i>Current User Base Profile</i>	16
2.6 PROCESS FOR CONFIGURATION OF ITSM PROCESSES IN THE ITSM TOOL.....	17
2.6.1 <i>Overview</i>	17
2.6.2 <i>Roles and Responsibilities</i>	18
2.6.3 <i>ITSM Process Design</i>	19
2.6.4 <i>ITSM Process Requirements Management</i>	19
2.6.5 <i>Lifecycle for Configuration of ITSM Processes in the ITSM Tool</i>	20
2.7 TRAINING STRATEGY OVERVIEW	22
2.8 PROJECT ORGANIZATION.....	22
2.8.1 <i>Project Governance</i>	22
2.8.2 <i>Enterprise ITSM Tool Project Roles and Responsibilities</i>	24
ATTACHMENT 2 - LEGACY ITSM TOOLS USED AT SSC AND CUSTOMER DEPARTMENTS	26
ATTACHMENT 3 – STANDARD FOR ITSM INTEGRATIONS (DRAFT)	27

ATTACHMENT 1 – ITSM PROJECT BACKGROUND INFORMATION AND CONTEXT

1 BACKGROUND

1.1 Shared Services Canada (SSC)

SSC is mandated to simultaneously operate and transform the GC's Information Technology (IT) infrastructure including email, data center and network services. SSC is responsible for the IT infrastructure for 43 departments and agencies (hereafter referred to as customer departments) and currently delivers services to over 300,000 users across the GC. Although SSC's first obligation is to ensure the sustainability of this infrastructure, it is also responsible to transform the existing environment into a consolidated enterprise model for the whole of Government.

1.2 Service Management Transformation

1.2.1 Service Management Transformation Program Overview

SSC has embarked on a multi-year journey to fundamentally transform its capabilities, with Service Management being a core component of the transformation. To ensure its services meet the requirements of customers, SSC is implementing a comprehensive service strategy that sets out how it will deliver enterprise IT infrastructure services, including roles and responsibilities and service targets. Central to this work is the launch of the SSC Service Management Transformation Program that is aimed at fundamentally transforming SSC ITSM capabilities. The Program is focused on:

- Delivering an enterprise ITSM technology solution
 - Accelerating the evolution of existing and development of new ITIL-based processes
 - Driving enterprise adoption of new tools and processes through a comprehensive organizational change management program.
- a) **Legacy Migration Project** – is advancing the consolidation of SSC support resources to one legacy ITSM ticketing tool, Enterprise Control Desk (ECD). This project is enabling SSC to better manage IT infrastructure by driving adoption of standardized service management processes. The consolidation to the existing tool will help ready SSC for the implementation of and migration to a new Service Management Tool. To date, 28 departments representing 25-30% of SSC tickets are leveraging the ECD tool.
- b) **Configuration Management Database Enhancement** – is an initiative to advance the maturity of this crucial database, and enhance the configuration information available to support Incident and Change Management. This work will also help ready SSC for the implementation of the new Service Management Tool.
- c) **ITSM Process Evolution** – is the multi-year initiative to establish enterprise-wide ITSM processes. This initiative is the core of the Service Management Transformation Program and will address the key challenges faced by SSC with regards to its fragmented operating environment, challenges in implementing enterprise processes, and inefficiency in generating effective performance reports.

ITSM Tool Implementation Services
Statement of Work

A contract was awarded in October 2017 for ITSM Process Maturity Solution services required to collaborate, plan, manage and deliver a fully integrated set of ten ITSM processes, backed by an organizational structure to support these processes, within SSC. There is a significant Organizational Change Management (OCM) component to the work to be delivered by the ITSM Process Maturity Solution contractor.

The ITSM Process Maturity Solution contractor is responsible for developing and documenting the detailed Functional Requirements for each ITSM process, from which the ITSM Tool Contractor will develop the Design Specifications and configure each ITSM process in the Tool.

- d) **Enterprise ITSM Tool Project** – is a multi-year project to establish an enterprise-wide ITSM Tool Solution. This project will directly support the other program initiatives by providing an ITSM Tool Software to be configured and deployed to production by the ITSM Tool Contractor in order to support SSC service management activities.
- e) **Expansion of Capacity** – capacity is also being enhanced in key areas to address resourcing issues and gaps in operational areas and to enable improved service delivery and customer satisfaction.

The Service Management Transformation Program also features a number of future year initiatives that would help advance the service management transformation agenda. Their implementation and funding are only forecasted in future years.

Through a phased approach, the goal is to stand up an effective service management function and implement mature ITSM processes to maximize efficiencies, simplify workflows, and enhance the quality of services SSC delivers to its customer organizations.

1.2.2 ITSM Process Design Priorities

SSC's Service Management Transformation Program will include the design and implementation of ten ITSM processes, listed below, and prioritized as Release Packages A, B and C. There are four additional optional processes. The ITIL best practice framework for IT Service Management will be used to define and provide guidance for the ITSM processes to be transformed under the Service Management Transformation Program.

ITSM Process Grouping	
Release Package A (Core Processes)	Service Asset Configuration Management including CMDB design
	Incident Management
	Request Fulfillment
	Change Management
Release Package B	Service Catalogue Management including Service Catalogue design
	Service Level Management
	Event Management
Release Package C	Knowledge Management
	Problem Management
	Release and Deployment Management
Optional Processes	Demand Management
	Capacity Management
	IT Financial Management
	Availability Management

The new redesigned ITSM Processes (as delivered by the ITSM Process Maturity Solution contractor) will be configured in the enabling ITSM Tool, by the Contractor.

SSC currently anticipates the delivery of 10 configuration-ready processes, to at minimum Lean¹ level, as follows:

- Release Package A:
 - Incident Management, Request Fulfillment, CMDB Design, and Catalogue Design - End of March 2019
 - SACM and Change Management. - End of July 2019
- Release Package B: End of September 2019
- Release Package C: End of November 2019

For each process, within the three release packages, the goal is to get them to a Mature² state within 30 months.

Notes: 1. Lean indicates that the highest value items identified through a SSC business and operational needs assessment of the in scope processes have been addressed to deliver basic functionality for the process that does not already exist or is limited. 2. 'Mature' indicates that the overall objectives for process improvement have been met.

2 ENTERPRISE ITSM TOOL PROJECT

2.1 Current State

ITSM Toolset

At inception in 2011, SSC inherited disparate systems and processes, which resulted in a highly reactive operating environment with no consistency in response, service restoration and request fulfillment. Incomplete visibility to workload, productivity and performance persists, impacting performance measurement and reporting.

The SSC Enterprise Service Desk provides support for SSC infrastructure services and some legacy client desktop services for 43 GC customer departments, including SSC itself. The Enterprise Service Desk acts as the entry point into SSC for service requests and incidents to either fulfill, resolve or coordinate the resolution with SSC service lines and vendors. The Enterprise Service Desk is currently supported by an ITSM Toolset comprised of IBM's Enterprise Control Desk (ECD) and other secondary tools. The ECD system has a number of integrations with different systems and applications across SSC and some Customer departments as described in more detail in section 2.3.

In addition to the ITSM Toolset in use at SSC, there are a variety of ITSM tools in use at SSC's customer departments to support departmental service requirements. Refer to Attachment 2 for additional details of the ITSM Toolset at SSC and customer departments.

Initiating and ticketing requests for SSC Services

Currently, requests for SSC support are received by the SSC ESD and/or SSC support staff as follows:

- **SSC** – SSC Departmental staff that have access to the SSC network initiate requests for services by:
 - Submitting the request via ECD Self-Service Portal (recommended method) which automatically generates a ticket in ECD where appropriate; or

- Contacting the Enterprise Service Desk via email or phone to log a service request, the Service Desk Agent will create a ticket in ECD as applicable.
- **Customer departments, desk-to-desk model** - GC end-users continue to log IT problems and requests via their established departmental support structure (e.g. Departmental Help Desk) and a ticket is created in the departmental tracking system; tickets related to SSC provided services are then transferred (i.e. assigned) to SSC through one of the following means:
 - **Swivel Chair** - Applicable IT issues are escalated to SSC via a telephone call from the customer department to SSC's Enterprise Service Desk where an SSC resource manually creates a ticket in SSC's ECD system. Not only is this a duplication of effort, but it also means that IT issues or request (i.e. tickets) cannot be effectively track end-to-end from the originating customer department through to resolution at SSC.
 - **Email Listener** (Email Probe) – Part of the Tivoli environment implemented at SSC to automate the generation and updating of tickets in SSC's ECD system; the email listener watches for incoming emails generated by the Management and Request fulfillment processes from 28 customer department ITSM Tools. In addition, the email listener also watches for incoming emails generated by the Change Management processes from six customer departments. The email listener incorporates the applicable ticket information into the ECD System as appropriate. For most customer departments the information only flows one-way from the customer department ticketing tool to SSC's ECD. In addition, the email listener does not provide field-to-field text mapping. Although the email listener solution provides a level of automation it does not provide an end-to-end view of IT service management
 - **ECD Self-Service Portal** – Named service desk agents at 28 customer departments can log requests to SSC via the ECD Self Service Portal; automatically generating a ticket in ECD and allowing the customer department to see status updates to their ticket.
- **Legacy Environments** – A large number of SSC staff remain embedded at specific customer locations supporting legacy environments using the customer department network, ITSM processes and tools. Largely, this group does not use SSC's ITSM Toolset and as a result SSC does not have visibility or oversight to all services provided by its employees. In situations where the onsite SSC resource requires support from other SSC resources, the individual must contact the Enterprise Service Desk to create a ticket in ECD.

In order for the Service Management Transformation Program to address the above deficiencies and achieve its desired outcomes, a requirement has been identified to:

- a) Replace SSC's current ITSM Toolset (including, but not limited to ECD) with a modern, scalable, ITSM Tool solution;
- b) Implement a bi-directional interface to enable communication and exchange of information between SSC's new ITSM Tool and (all 43) customer departments in order to replace current manual processes/workarounds; provide visibility and oversight to all services provided by SSC; and effectively track IT issues and requests end-to-end from the originating customer department through to resolution at SSC; and
- c) Longer term; enable the transition of customer departments from legacy ITSM toolsets to GC standardized ITSM processes and a standard ITSM Toolset.

2.2 Target Solution

2.2.1 Vision for ITSM

SSC has identified the following business outcomes for a successful Enterprise ITSM Tool Project:

- **Single self-service entry point for customer and end-user access to SSC services**
 - Established single entry point with e-enabled self-service capability
 - Customers and end-users are able to easily access information about and obtain support for SSC's services
- **Accelerated adoption of standardized enterprise ITSM processes**
 - Increased automation of enterprise ITSM processes through the implementation of the new ITSM Tool Solution
 - Improved visibility and access to real-time information
- **Realization of operational efficiencies and increased productivity**
 - All SSC tickets are recorded and managed in a single tool
 - Improved reliability, timeliness and visibility of enterprise ITSM data
 - Increased integration of SSC and customer ITSM processes with seamless information sharing
 - Increased productivity by reducing fragmented operating environments and the need for manual interactions
- **Improved business analytics capability**
 - Higher quality data supports stronger Operational Performance Reporting and business analysis
 - Enhanced reporting capability, allowing for the correlation of KPIs from multiple ITSM processes into a consolidated view
 - Ability to export ITSM data to SSC data warehouse analytics function
- **Reduced number of ITSM tools in operation and maintained by SSC and across the GC**
 - GC is able to leverage the ITSM Tool Solution contract to acquire ITSM software licensing and professional services
 - Increased interoperability between SSC/Customer ITSM tools and other supporting systems/application (e.g. Finance, monitoring, etc.)
 - Opportunity to decommission aging, low quality tools at SSC and across government

2.2.2 ITSM Tool Project Objectives

At a high level, the objective for the Enterprise ITSM Tool Project is to provide the technical foundation in support of the ITSM Transformation Program. The ITSM Tool selected and implemented under the Project must meet SSC's Non-Functional and Functional requirements as set-out in Appendices 1 and 2 respectively.

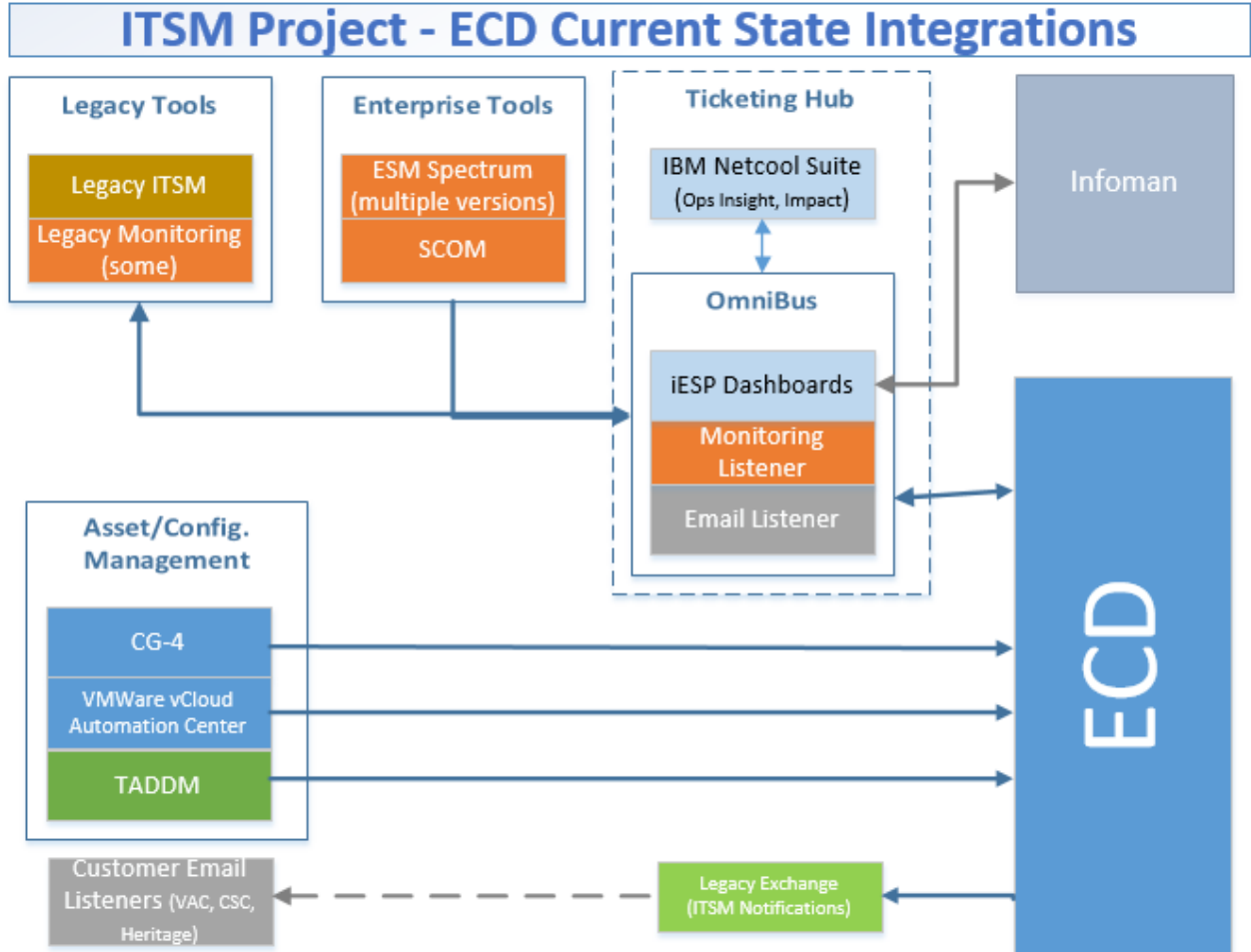
2.2.3 Establishment of GC Standards

- a) The ITSM Tool selected and implemented as part of the Enterprise ITSM Tool Project will establish the Departmental ITSM software standard for SSC. In addition, the Enterprise ITSM Tool Project will also provide a foundation for establishing GC-wide ITSM standards, processes, and tools:
- b) The ITSM Tool selected and implemented under this Contract may, in the future, establish the common software standard for the Government of Canada.

2.3 ITSM Tool Integration

2.3.1 Current State

SSC's current Enterprise Control Desk (ECD) system has a number of integrations with different systems and applications across SSC and some customer departments as depicted in the following graphic.



2.3.2 Future State

Implementation of the new ITSM Tool must include an integration solution including:

- The development of a holistic integration strategy which will establish standards for the exchange of information and may, in the future, leverage GC Service Bus (i.e. Oracle Service Bus);
- The design and implementation of a standards-based bi-directional interface which adheres to SSC's ITSM Data Standards to support the exchange of data between SSC's new ITSM Tool and the ITSM Tool(s) in use at the customer departments (refer to Attachment 3 for a draft version of SSC's ITSM Data Standards);
- The implementation of interim interoperability solution between the new ITSM Tool and SSC's existing ITSM-related tools in order to ensure business continuity until such time as the functionality from those legacy tools is replaced by the new ITSM Tool; and
- The implementation of interfaces between the new ITSM Tool and required SSC corporate systems.

The Table below represents the anticipated future state minimum requirements for integrations that will be implemented as part of the new ITSM Tool Solution. SSC anticipates that the long term integration solution will be implemented on a phased basis and some legacy integrations will remain until such time as they can be replaced.

Table 1 – Integration Requirement Summary

Application / System to be Integrated with ITSM Tool	Description of Application / System	Target solution integration requirements
Organizational Data Feeds	Future requirement to automate where applicable the import of foundational data required by the Tool.	The ITSM Tool Solution must automate the loading of foundational data that supports tool functionality. For example (but not limited to): <ul style="list-style-type: none"> • Employees and related data • SSC and government locations and addresses
IBM Tivoli OmniBus – IESP Dashboards	Omnibus is used in multiple locations of SSC's Enterprise Command Centre (ECC) to monitor network events originating from various GC monitoring tools.	The ECC has developed a series of iESP dashboards in Omnibus to provide different views of events for various Customer departments, or portfolios of Customer departments. ECC staff require the ability to update the work log and status of associated ITSM incidents. The ITSM Tool Solution must support connectivity from Omnibus dashboards to reflect pertinent information entered on ITSM incidents in real time.
IBM Tivoli OmniBus – ESM Spectrum	Enterprise Monitoring Service	ECC staff require the ability to create an ITSM incident directly from the

ITSM Tool Implementation Services
Statement of Work

Application / System to be Integrated with ITSM Tool	Description of Application / System	Target solution integration requirements
IBM Tivoli OmniBus – SCOM	Enterprise Monitoring Service	Omnibus console(s), passing relevant data to the incident.
Your email @canada.ca service	The Government of Canada’s enterprise Email service, based on MS Outlook and Exchange (or future options, e.g. Office365).	<p>The ITSM Tool must use SSC’s “Your Email Service” (YES) @canada.ca enterprise email solution for:</p> <ul style="list-style-type: none"> • Outgoing ITSM notifications • Incident and/or request creation and updates via inbound email messages. <p>The ITSM Tool Solution’s Email mechanism must support the following requirements:</p> <ul style="list-style-type: none"> • TLS over port 587 <p>Access to email system through a service account with credentials (no anonymous access will be permitted)</p> <p>The ITSM Tool Solution must not spoof the <From> address in outbound emails. For example, the Tool must not substitute the service account with the account of a Tool user who may have triggered the notification.</p>
Bi-directional interface with customer departmental ITSM Tools	New functionality required by the ITSM Tool Solution to provide bi-directional communication between SSC and GC Customer ITSM solutions.	<p>The bi-directional interface will replace the current Tivoli OmniBus – Email Listener Probes.</p> <p><i>Draft</i> Integration standards for the interface between SSC and GC Customer Department ITSM Tools are further described in Attachment 3 – Standard for ITSM Integrations</p>
CG-4 Asset Tracking System	Barcode scanning and asset tracking tool that the IT Asset Management group uses to scan, create and update asset records in ECD.	<p>CG4 is an asset tracking system currently in use at SSC, and must be integrated with the ITSM Tool Solution to support bi-directional exchange of asset information.</p> <p>Automated process that requires no manual loading of the asset details.</p>
VCAC (VMWare vCloud Automation Centre)	Hypervisor automation product used to populate CMDB	SSC requires virtual servers and infrastructure that are instantiated in SSC’s VCAC environment are automatically represented as CIs in the ITSM Tool Solution’s CMDB along with all relevant relationships.

ITSM Tool Implementation Services
Statement of Work

Application / System to be Integrated with ITSM Tool	Description of Application / System	Target solution integration requirements
IBM Tivoli Application Dependency Discovery Manager (TADMM)	Discovery tool currently used at SSC.	The ITSM Tool must integrate with TADMM, as well as other Discovery sources, in such a way that configured dependency mappings are represented in the CMDB with accuracy, and in full support of impact analysis activities during Incident investigation and Change Request planning.
Procurement and Asset Tracking System (PATS)	PATS is a home-grown tool containing asset receipt information which leads to the creation of Asset records in ECD	A bulk export is performed from the Tool and then manually imported into the ITSM Tool using pre-defined templates. Initially, the ITSM Tool Solution must support the manual processes in which asset receipt information is exported from PATS and manually imported into the ITSM Tool. Future implementation phases will automate this process.
Directory Services (MS Active Directory or future options)	Authentication Service	The ITSM Tool Solution must authenticate ITSM users of all types using SSC's Enterprise Directory Services solution. The Contractor is responsible for identifying to SSC use cases or situations where this is not possible, and propose alternative solutions.
iTOP	iTOP is an open source ITSM tool developed by Combodo. SSC is in the process of deploying iTOP to collect CMDB data from SSC and GC Customer departments, and run extract, transform and load (ETL) processes to prepare the data to load into SSC's legacy (ECD) CMDB.	The ITSM Tool Solution being implemented by this project is required to support and accept CMDB data from this process in an automated fashion.
SIGMA	SIGMA is the financial system that SSC uses; it is based on System Application Products (SAP) technology. Data for Purchase Orders through which assets were purchased by SSC are captured for upload into ECD.	Currently, a bulk export is performed from SIGMA and then manually imported into ITSM using pre-defined templates. Initially, the ITSM Tool Solution must support the manual process in which Purchase order data for assets purchased by SSC is exported from SIGMA and manually imported into the

ITSM Tool Implementation Services
Statement of Work

Application / System to be Integrated with ITSM Tool	Description of Application / System	Target solution integration requirements
		<p>Tool. Future implementation phases will automate this process.</p> <p>A bulk export is performed from the Tool and then manually imported into ITSM using pre-defined templates.</p>
Procure to Pay (P2P)	<p>The SSC Procure to Pay (P2P) Portal, is a module of SAP which introduces an electronic and collaborative format for purchasing with SSC and enables the consolidation of requirements and the optimization of procurement planning, management, payment and reporting.</p>	<p>Initially, the ITSM Tool Solution must support the manual process in which the purchase requisitions, purchase orders and warranty/contract information in P2P is exported and manually imported into the ITSM Tool. Future implementation phases will automate this process.</p>
Directory of Federal Real Property (DFRP)	<p>GC application used to populate and manage location data for assets</p>	<p>Initially, the ITSM Tool Solution must support the manual process in which the data is exported and manually imported into the Tool. Future implementation phases will automate this process.</p>
Registry of Applied Titles	<p>GC application that serves as the registry of applied titles for GCC Department and agency names.</p>	<p>Initially, the ITSM Tool Solution must support the manual process in which the data is exported and manually imported into the Tool. Future implementation phases will automate this process.</p>
Cognos Business Intelligence (BI) / Reporting	<p>Used for creating reports based on ECD data.</p>	<p>The ITSM Tool is required to send operational data to the Cognos database in support of current and ongoing reporting requirements.</p>
Enterprise Reporting	<p>Used for creating reports based on ITSM data.</p>	<p>The ITSM Tool Solution must support and integrate with industry leading Business Intelligence and reporting solutions.</p>

2.4 ITSM Tool Solution Implementation Strategy

SSC envisions undertaking a multi-phased approach, over a number of years, to attain its long-term vision for a GC-wide enterprise ITSM Tool Solution as follows:

2.4.1 Enterprise ITSM Tool Project Phase 1 – Implement ITSM Tool at SSC and Develop bi-directional Interface

The primary objective of Phase 1 of the Enterprise ITSM Tool Project is to implement the ITSM Tool Solution to support SSC's service management requirements for core processes. The key deliverables of Phase 1 are expected to include:

- a) Replacement of SSC's current ITSM Toolset with the new ITSM Tool, including installation of the software and configuration* of four Core processes as they are re-designed (i.e. Release Package A), and migration of data to support these processes from the existing tools to the new ITSM Tool.
- b) Integration of the new ITSM Tool with SSC's Enterprise applications and tools, including integration with ECD until such time as it is fully replaced.
- c) Development and implementation of a standard bi-directional interface that enables exchange of information between SSC and customer departments in accordance with the Integration Standards established at that time (draft version provided in Attachment 3).

Processes may be initially configured to replace redesigned process (at a Lean level) and subsequently updated/reconfigured as processes are refined (to a Mature level), refer to section 2.2.2 for details.

2.4.2 Enterprise ITSM Tool Project Phase 2 – Expand the ITSM Tool at SSC and Onboarding of First Tenant

In Phase 2 of the Enterprise ITSM Tool Project, the ITSM Tool Solution will be expanded to support additional processes and the first customer department will migrate to the new ITSM Tool. The key deliverables of Phase 2 are expected to include:

- a) Configuration* of additional processes as they are re-designed (i.e. Release Packages B and C).
- b) Implementation of a Disaster Recovery solution.
- c) Onboarding of the first Tenant (customer department) as a tenant on SSC's multi-tenant instance of the ITSM Tool, including migration of customer department data from current departmental tools to the new ITSM Tool and integration of the new ITSM Tool with the customer department's enterprise applications and tools.

It should be noted that the scope of the Enterprise ITSM Tool Project is limited to the deliverables in Phases 1 and 2. Implementation of the ITSM Tool for interested customer departments across the GC will commence (under the scope of this contract) after the Project has installed of the software for SSC, configured the four Core processes and migrated the data to support these processes.

2.4.3 Onboarding of Additional Departments

It is anticipated that the ITSM Tool Solution will continue to be expanded across the GC, over the period of the contract, as Other Government Departments (OGDs) replace their legacy ITSM Tools with SSC's GC-standard ITSM Tool.

The adoption of the GC-standard ITSM Tool by specific OGDs may be achieved through onboarding as a **tenant on SSC's multi-tenant instance** as well as the implementation of separate instance(s) as detailed below.

2.4.3.1 Tenant on SSC's Multi-tenant Instance

Following Phase 2 of the Enterprise ITSM Tool Project and onboarding of the first tenant, SSC's solution will be scaled as required to support onboarding of each OGDs **as a tenant on SSC's multi-tenant instance**. Additional Software licences and SSC provided hardware capacity may be required to support each additional tenant. SSC will leverage its re-designed processes and configured Tool to support onboarding of the tenant departments.

2.4.3.2 Separate Instance

In addition, other OGDs may elect to migrate to the GC-standard ITSM Tool as a **separate instance** of the Solution, accomplished in one of two manners:

- a) As a separate instance of the ITSM Tool Solution on SSC provided infrastructure. Each separate instance may require additional licenses as well as additional professional services to support the configuration of the Tool for the specific OGD. SSC will provide hardware capacity as necessary to support the additional instance of the ITSM Tool. The OGD must adhere to process integration standards and is responsible for their own organization's ITSM process design/maturity.
- b) As a separate instance of the ITSM Tool Solution on OGD provided infrastructure. Each separate instance may require additional licenses as well as additional professional services to support the configuration of the Tool for the specific OGD. The OGD will provide the infrastructure (e.g. cloud) required to support their instance of the ITSM Tool. The OGD must adhere to process integration standards and is responsible for their own organization's ITSM process design/maturity.

2.5 Volumetric Data

The following information (based on current statistics from ECD) is provided as a reference for ITSM workload that can be used to determine hardware capacity and integration throughputs. We anticipate the volumes will be similar at start of the project but will increase as ITSM processes are configured and customer departments interface with and/or adopt the Tool. While the first Tenant department has not been identified it is anticipated that it will be relatively small from an IT perspective (i.e. no more than 15% of SSC's User Base and system capacity).

2.5.1 SSC ITSM Record Volumes

The estimated number of ITSM records representing SSC's ITSM workload is summarized in the table that follows:

Record Type	Quantity (per year)	Description
Service Requests	671,666	Estimated number of service requests received by SSC in 2017 within the current ITSM Tool (ECD) from the 28 departments whose agents are using the Tool.
Incidents	82,500	Estimated number of incidents received by SSC in 2017 within current ITSM Tool (ECD) from the 28 departments whose agents are using the Tool.
Problem Records	1,009	Estimated number of Problem Records in 2017 by SSC within the current ITSM Tool (ECD).

ITSM Tool Implementation Services
Statement of Work

Change Requests	39,780	Estimated number of change requests reported to and/or managed by SSC in 2017 within the current ITSM Tool (ECD).
Configuration Items (CMDB records)	82,000	Refers to the number of CIs specifically. This does not take into account potential records representing relationships between CIs.

2.5.2 Current User Base Profile

The SSC user base for the current ITSM Toolset is summarized in the table that follows.

User Base	Number of Users (approximate)	Description
Service Desk staff at Customer Departments	1,500	Service Desk agents at customer departments that use the current ITSM Tool (ECD); are able to view only their own department's tickets.
SSC Users	4,500	SSC users of the current ITSM Tool (ECD), including all permission types.
Current Total	6,000	

SSC Permissions	Number of Users (approximate)	Description
Note: SSC Users (above) include the following types of permissions; an individual user may have multiple permissions.		
ITSM Tool System Administration	11	Full Admin rights to ITSM tool.
SSC Enterprise Service Desk (ESD)	103	SSC Enterprise Service Desk (ESD) agents.
Incident Coordinator (IC)	185	Performing Incident Management operational process activities. Incident coordination and Major Incident Coordination.
Problem Manager	19	Performing Problem Management operational process activities.
Event Management	98	Enterprise Command Centre (ECC) agents performing event management activities and support.
Change Management	80	Performing Change Management and Coordination activities
Change Owner	1850	Total number of users using change management module
Request Fulfillment Administrator	12	Role to perform all the Administrative functions of Service Catalog. Access to all offerings.
Request Fulfillment Support	133	Role to perform the Service desk and activity/tasks functions of Service Catalog. Access to all Offerings
Asset Management	45	Full access to Asset but no permission to delete.

ITSM Tool Implementation Services
Statement of Work

SSC Permissions	Number of Users (approximate)	Description
		<ul style="list-style-type: none"> • Read access to Storeroom, Item Master, Master Contract • Update access on Companies, General Contract, Warranty Contract
Asset Administrator	27	Complete access to Asset including delete <ul style="list-style-type: none"> • All access to Storeroom, Item Master, Inventory, Companies, Contract and Procurement (PO)
Asset Procurement	33	Read only Asset <ul style="list-style-type: none"> • Full access to Item Master, Inventory Usage • Read only Master Contract • Contains more rights relating to procurement of assets: Full access to Companies, Contract, Purchase Order, Receiving
Asset Operator	47	<ul style="list-style-type: none"> • Access to Asset (create-update - no access to Change status and move) • Access to Inventory • Read access to Master Contract, General Contract, Warranty contract
Configuration Management	13	Full access to CI
Configuration Librarian	195	<ul style="list-style-type: none"> • Full access to CI • Extra access such as Service Address and Map Manager
Configuration Auditor	1	Full access to CI

2.6 Process for Configuration of ITSM Processes in the ITSM Tool

2.6.1 Overview

This section describes how business requirements pertaining to ITSM Processes will be managed and implemented in the ITSM Tool.

The requirements implementation process will be collaborative, involving the ITSM Process Maturity Solution contractor and the Contractor, with oversight and support from SSC. Roles and responsibilities are identified in subsequent sections of this document.

The intent of the process is to deliver maximum value while supporting the following guiding principles:

- Remain flexible and adaptable at all times.
- High-value requirements will be prioritised higher than low-value requirements for implementation.
- Requirements will be accurately understood by all parties prior to implementation.

ITSM Tool Implementation Services
Statement of Work

- All Tool configurations and changes will be adequately documented and tested prior to release.
- Traceability will be maintained for all requirements, from requirement gathering through implementation to production

Through collaboration ITSM Tool Solution functionality will be delivered, as and when requested, through successive releases. The duration of each Release will be determined during the planning stage for each Release and may differ from one another depending on the requirements being addressed at the time. For example, a relatively long release may be required for the initial implementation of an ITSM process, while shorter, iterative releases may be appropriate in the support of ongoing maturation of the process and Tool in an incremental fashion.

2.6.2 Roles and Responsibilities

The ITSM processes will be developed, implemented collaboratively by SSC, the ITSM Process Maturity Solution contractor (PwC), and the Contractor, with high level responsibilities as follows.

Process for Configuration of ITSM Processes in the ITSM Tool Roles and Responsibilities	
SSC	<ul style="list-style-type: none"> • Contractor oversight of process onboarding onto Tool • Contractor management (including managing vendor inter-relationships) • Management of the Enterprise ITSM Tool Project, including: <ul style="list-style-type: none"> ○ Project governance, including project reporting and integrated project schedule ○ Subject matter expertise related to SSC current processes, business requirements ○ Deliverable review and acceptance process ○ User acceptance testing (UAT) ○ Stakeholder management ○ Contract Management • Oversight and approval of the Process Configuration Requirements Specifications for the ITSM Tool. • Responsible for the Requirements Management process for the ITSM Tool Solution, which includes prioritization and traceability. • Provisioning and support of required infrastructure. (Note: SSC's mandate includes a 'Cloud first' approach, as such the resulting ITSM Tool Solution could, in the future, be migrated from an on premise infrastructure solution to a public or private 'Protected B' cloud.) • Approval of Functional Design Specifications produced by the Contractor.
ITSM Process Maturity Solution Contractor	<ul style="list-style-type: none"> • Leverage SSC requirements documentation, develop and document a detailed statement of business, functional and technical requirements for the ITSM Process Maturity Solution. • Document conceptually how each ITSM process will function within SSC, incorporating SSC's interactions with GC customer departments. • Perform business analysis in order to document ITSM process requirements.

Process for Configuration of ITSM Processes in the ITSM Tool	
Roles and Responsibilities	
	<ul style="list-style-type: none"> • Produce Process Configuration Requirements Specification documents which will be the primary source of ITSM process configuration requirements provided to the Contractor. • For each Release, produce a deployment plan and checklist for the transition of new or modified ITSM Tool process functionality to operational state, ensuring it integrates with the Contractor's ITSM Tool cutover plan and checklist. The plan will include business release planning, training and communications to identified stakeholders. • Organizational Change Management (OCM) program planning and execution to support the successful implementation of the new ITSM processes and each release of ITSM Tool functionality.
Contractor	<p>The Contractor's roles and responsibilities with respect to configuring the ITSM Tool to address ITSM process requirements are more fully detailed in section 2.6.5.</p> <p>The requirements of the Contractor are set-out in Annex A, Statement of Work (SOW).</p>

2.6.3 ITSM Process Design

The ITSM Process Maturity Solution contractor, in support of SSC's ITSM Process Evolution initiative, is responsible for the design of ten ITSM processes as listed in section 1.2.2. The ITSM Process Maturity Solution contractor will identify ITSM process requirements in the form of Process Configuration Requirements Specification documents. The Process Configuration Requirements Specifications will be approved and prioritized by SSC prior to being assigned to the Contractor for ITSM Tool configuration.

2.6.4 ITSM Process Requirements Management

The Requirements Management process for ITSM processes and associated Tool functionality will be managed by SSC and supported by the Contractor.

SSC's ITSM Tool Business Owner will maintain oversight, and determine priority of all requirements pertaining to the ITSM Tool Solution, including ITSM process configuration, integrations, data migration, reporting, performance tuning and maintenance. The Contractor will provide input to the requirements content and prioritization when and as requested by SSC.

Release planning (including release scope) will be a collaborative activity led by SSC, involving the ITSM Tool Business Owner, ITSM Process Maturity Solution contractor, Enterprise ITSM Tool Project Manager, the Contractor, and other stakeholders as required.

The responsibility to lead or support each step of the requirements process is further described in the following table:

ITSM Process Requirements Management Process	Responsibility		
	ITSM Process Maturity Solution contractor	SSC	Contractor
1. Document Business Requirement	Lead	Approve	Support
2. Prioritize Requirements	Support	Lead & Approve	Support

ITSM Tool Implementation Services
Statement of Work

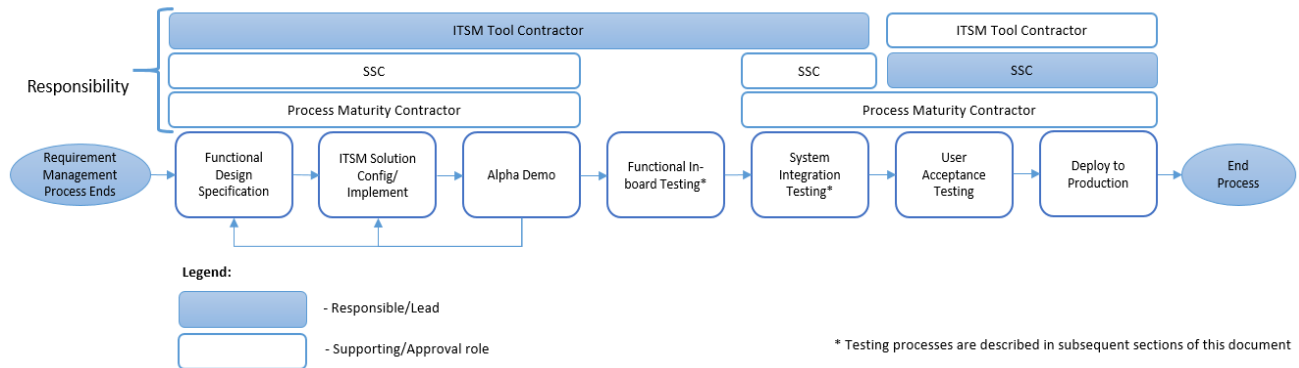
3. Refine High-Priority Requirements	Lead	Approve	Support
4. Create Process Configuration Requirements Specification	Lead	Approve	Support
5. ITSM Tool Release Planning	Support	Lead & Approve	Support

2.6.5 Lifecycle for Configuration of ITSM Processes in the ITSM Tool

The Contractor will lead a collaborative business systems analysis and Tool configuration process that will involve representatives from SSC and the ITSM Process Maturity Solution contractor. The implementation process will take place in the context of one or more aforementioned Releases.

Implementation of ITSM process requirements will be undertaken with responsibilities shared between the ITSM Process Maturity Solution contractor and the Contractor, in accordance with the process depicted below. All ITSM Tool Solution deliverables including, but not limited to ITSM process configuration, integrations, data migration, reports, and customization/coding will be developed following the same development process.

Note: Each Release will include a Planning period during which time the scope of work and duration of each Release will be determined.



The responsibility to lead or support each step of the Tool configuration process is further described in the following table:

Tool Configuration Process	Responsibility		
	ITSM Process Maturity Solution contractor	SSC	Contractor
1. Functional Design Specification	Support	Approve	Lead
2. Configuration/ Development Phase	Support	Support (Approve if applicable)	Lead
3. Alpha demo	Support	Approve	Lead

ITSM Tool Implementation Services
Statement of Work

4. Functional In-board Testing (FIT)	-----	-----	Lead
5. System Integration Testing (SIT)	Support	Approve	Lead
6. User Acceptance Testing (UAT)	Support	Lead & Approve	Support
7. Deploy to Production	Support	Lead & Approve (provide Tier-1 support and trouble-shooting)	Apply changes to production & Provide Tier-2 support

Each step of the Tool configuration process is further described in the following table.

Tool Configuration Process Steps	Description
1. Functional Design Specification	<p>The functional design specification is developed. This document specifies exactly how the functional requirements will be met by the ITSM Tool Solution (e.g. workflows, button actions, additional form fields, etc.).</p> <p>The functional design specification is reviewed with SSC and the ITSM Process Maturity Solution contractor; this may be an iterative process for complex requirements. JAD sessions (Joint Application Design) may be used to expedite this step. SSC must approve the Functional Design Specification prior to configuration.</p> <p>This document is used as input for all downstream development process steps.</p>
2. Configuration/Development Phase	<p>The functional requirements are implemented in the ITSM Tool Solution according to the functional design specification. Depending on the features being implemented, oversight and approval may be required by SSC.</p> <p>Unit testing is completed in this step.</p>
3. Alpha demo	<p>Newly implemented functional requirements are demonstrated to stakeholders to gain early feedback in advance of formal testing. The goal of this step is to ensure that the ITSM Tool Solution, as implemented, does in fact satisfy the functional requirements.</p> <p>The development process may return to Step 1 or Step 2 following an alpha demo.</p>
4. Functional In-board Testing (FIT)	<p>Integration testing done in the development environment to ensure that new features are functioning as expected and that it interoperates with other tools/applications as required.</p>
5. System Integration Testing (SIT)	<p>System testing done in the test environment where application is run through a test suite to ensure that overall system functionality is not broken.</p>
6. User Acceptance Testing (UAT)	<p>End-to-end testing done in the test environment, by the customer, where the application is run through a test suite (end-to-end) to ensure that overall functionality is not broken and business requirements/processes are supported.</p>

Tool Configuration Process Steps	Description
7. Deploy to Production	SSC provides oversight for the technical implementation of new functionality and manages all supporting business planning and Organizational Change Management (OCM) activities.
	<p>The Contractor manages the technical aspects of the implementation of new functionality in Production:</p> <ul style="list-style-type: none"> - Raising the necessary SSC change request(s) - Coordinating with other technical teams as required - Following SSC's change management processes - Deploying the configuration changes to Production - Communicating with identified stakeholders, change coordinators re: the status of the change

2.7 Training Strategy Overview

SSC's Service Management Transformation Program training strategy includes the training of SSC employees to work with ITSM processes and the new ITSM Tool Solution based on their role within the organization (e.g. process user, process approver, etc.) The training strategy also includes training of SSC ITSM Tool Solution administrators and support resources that will assume responsibilities for the new ITSM Tool Solution following transition of responsibilities from the Contractor to SSC.

SSC, in conjunction with the ITSM Process Maturity Solution contractor, will be responsible for the development and delivery of the SSC employee ITSM process and new ITSM Tool Solution training based on employee roles within the organization. To enable and support the development and delivery of this training, SSC will need to understand how the processes are mapped in the new ITSM Tool Solution and receive sufficient training on the Tool in order to understand the overall structure and layout of the application, its modules and its use.

As part of the requirement to provide a Transition Plan as detailed in section 12 of Annex A, SOW, the Contractor will identify Training requirements to enable SSC resources to assume responsibility for the Enterprise ITSM Tool Solution.

The Contractor is responsible to provide the Training requirements set-out in section 10 of Annex A, SOW.

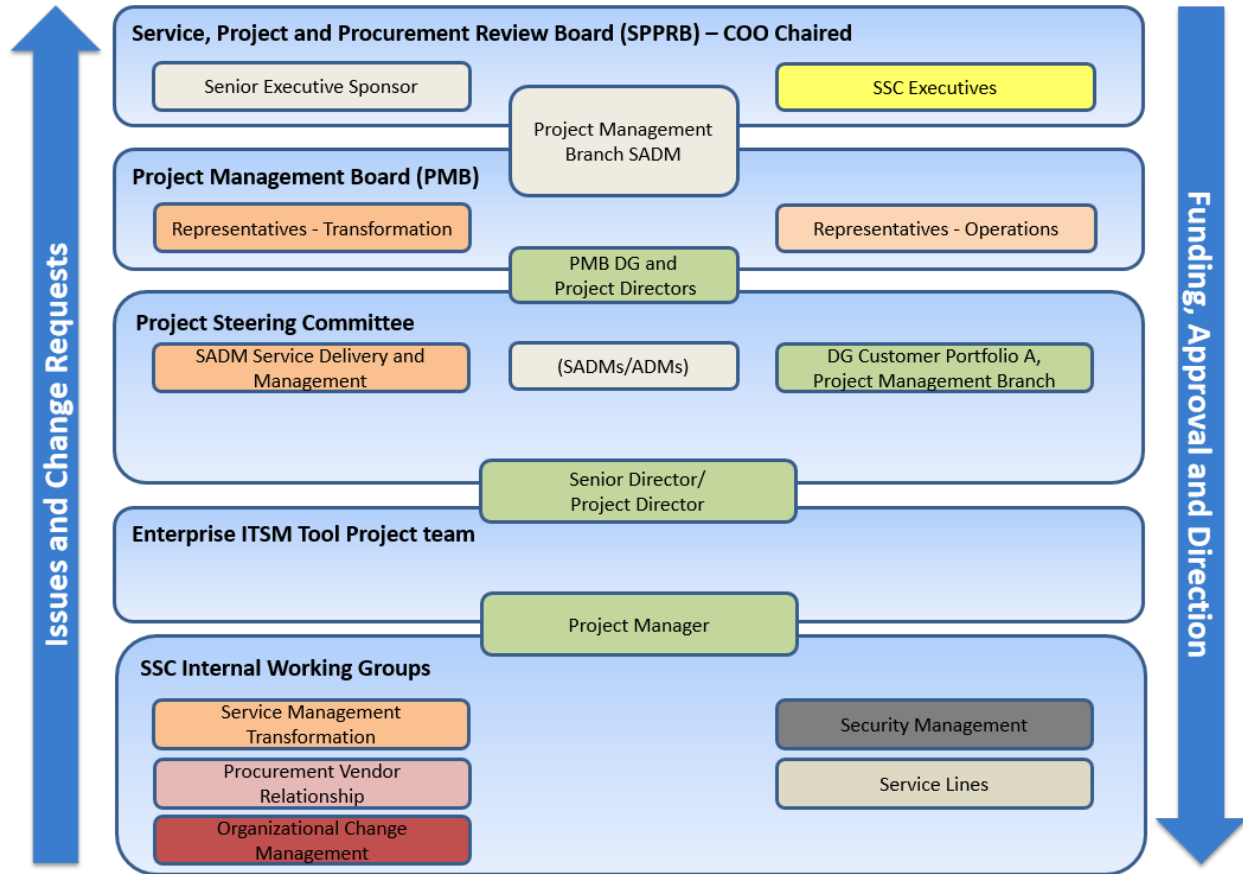
2.8 Project Organization

2.8.1 Project Governance

This project is a PCRA Level 3 project and it will be managed under the Project Steering Committee (ongoing issues, strategy/vision, and guidance) and the Project Management Board (gating approvals).

The project is being managed by the Project Management and Delivery Branch in support of the Transformation Program and will follow standard project governance processes required by SSC's Project Governance Framework (PGoF). As necessary, recommendations or requests from the Project Steering Committee are presented to other standard committees that are part of SSC's overall governance structure.

SSC Project Governance – Enterprise ITSM Tool



2.8.2 Enterprise ITSM Tool Project Roles and Responsibilities

Project Role	Responsibilities
Branch Head Sponsor	<p>The Branch Head Sponsor is generally at the ADM level and is the executive accountable for realizing the benefits and business outcomes of the project.</p> <ul style="list-style-type: none"> • Acts as champion for the project; • Approves the Business Case and other project deliverables prior to departmental review and approval; • Secures the required resources and funds to deliver the projects; • Stays abreast of project status; • Approves change requests (within authorized limits), or recommends to higher approval authority as required; • Reports on the realization of the benefits and project business outcomes.
Business Sponsor	<p>The Business Sponsor is the person responsible for the business outcomes of the project, as well as providing the business requirements and the funding for the project. The Business Sponsor for SSC-led projects relating to services is the Service Lead. The Business Sponsor for new or changed internal SSC business processes or systems is the business owner of that process or system. The Business Sponsor for Customer-led projects is the Customer, however the Service Delivery Manager acts as “Internal Project Sponsor” on behalf of the Customer, for customer-led projects.</p> <ul style="list-style-type: none"> • Defines the Business Case; • Facilitates the key organizational support needed to create a successful project; • Funds the project; • Accepts the results and outcome of the project, and will typically act as the business owner once the project’s deliverables are placed into operation; • Puts the service (i.e. the results of the project) into operation; • Provides business requirements, on behalf of the end users; • Coordinates the involvement of Customer representatives; • Provides validation, verification and testing of the project deliverables, including User Acceptance Testing; • Approves change requests (within authorized limits); and, • Ensures user adoption.
Project Steering Committee	<p>Consisting of ADM and DG-level members, the key role of the Steering Committee is to provide guidance and oversight of the Process Evolution Initiative and Enterprise ITSM Tool Project. More specifically the Steering Committee ensures continuous alignment of project and initiative priorities and schedules, management of associated risks, and realization of benefits. The committee also serves as a governance and acceptance body of the ITSM Process Maturity Solution Contract deliverables, which is a key component of the ITSM Process Evolution Initiative.</p> <ul style="list-style-type: none"> • Provide senior management direction, oversight and support to the project/initiative; • Review systemic project/initiative-related issues and associated resolution plans, including risk mitigation; • Ensure appropriate SSC stakeholders are involved in decision-making to ensure project/initiative objectives are met; • Ensure continuous alignment of the project/initiative with broader GC and SSC organizational plans and priorities;

ITSM Tool Implementation Services
Statement of Work

Project Role	Responsibilities
	<ul style="list-style-type: none"> • Advocate timely completion of project/initiative deliverables and highlight consequences of change; • Through the co-chairs, direct the Committee with respect to major project/initiative decisions and artefacts; and • Through the co-chairs, discuss and escalate unresolved issues through SSC governance channels (PMB, SPPRB, etc.).
Senior Director / Project Director	<p>The Project Management Executive is responsible for all projects and project managers in their directorate.</p> <ul style="list-style-type: none"> • Operates a Project Management Office (PMO) for projects within the branch; • Ensures standards and best practices are adhered to; • Ensures that project data is up-to-date in the project repository tool; • Ensures that project deliverables are stored and kept current; • Ensures that project financial data is kept current in the financial system; • Liaises with the Project Management Centre of Excellence (PMCoE) for current templates, forms, best practices, and project oversight tools.
Project Manager	<p>The SSC Project Manager (SSC PM) is fully responsible for the successful completion of the project including the day-to-day management of the project. The SSC PM's authority is set out in the Project Charter. The SSC PM reports to the Project Management Executive while being accountable to the Business Sponsor. The SSC PM:</p> <ul style="list-style-type: none"> • Is fully responsible for the successful completion of the project; • Supports the Branch Head Sponsor and the Business Sponsor in the realization of the project outcomes; • Acts as the SSC Project Manager for the project; • Is responsible for day-to-day management of the project, including management of the Project Team; • Ensures adherence to the SSC Directive for Project Management; • Develops and secures approval for all project documents, such as the Project Charter and Project Management Plan; • Achieves the approved project scope within the planned (baseline) cost and schedule; • Monitors variances in the project scope, cost and schedule against the approved scope, cost and schedule baseline plans, and takes required corrective actions; • Implements communications plans, and ensures engagement of stakeholders; • Ensures proactive and continuous management of risks and issues, facilitating the resolution or appropriate escalation; • Ensures Project Change Requests for all changes to baseline scope, cost and schedule are completed and approved; • Provides timely, consistent, and accurate project status reporting.

ATTACHMENT 2 - LEGACY ITSM TOOLS USED AT SSC AND CUSTOMER DEPARTMENTS

This attachment is intended to provide additional insight to the current ITSM environment at SSC and our customer departments however it is not intended to be an exhaustive list.

ITSM Topic - SSC and Partners Only (SSC Clients/GC Agencies excluded)	ITSM Metrics
Estimated total number SSC Infrastructure Configuration Items (CI)	82,000
Estimated total number of annual SSC Service Request and Incident tickets:	500,000

ITSM Tool Used - SSC and Partners Only (SSC Clients/GC Agencies excluded) **Some partners have multiple ITSM tools in place	# of Partners
Axios Assyst	9
BMC Remedy	8
BMC Remedy (custom)	2
BMC Service Desk	2
BMC Service Desk Express	1
BMC Track-IT!	1
Frontrange Heat	3
HP Service Manager	4
JIRA	2
LANDESK	2
ManageEngine ServiceDesk Plus	1
ChangeGear	1
Dell Helpdesk Authority	1
Easy Vista	1
HP Open View Asset Centre	1
IBM SmartCloud	1
InfoWeb	2
Microsoft System Center Service Manager	1
OTRS	1
Rochade	1
SAP (Asset Management)	1
SRIMS	1

ATTACHMENT 3 – STANDARD FOR ITSM INTEGRATIONS (DRAFT)

This document identifies the GC Standard on ITSM Integration and establishes the requirements for the enterprise ITSM processes supporting the delivery of IT infrastructure services to GC departments and agencies.

Provided under separate cover