SMI003 : Unidesk CMDB - Project Brief

Project Brief

This UniDesk Incident, Problem and Change&Release processes would all be improved if underpinned by a Configuration Management Database (CMDB).

Additionally, there is a need to have an inventory of key assets for the partners and business units within the partners.

1. Overview

1.1 Background

UniDesk is an ITIL based shared service. It is available using Shibboleth over the web for Higher and Further Education. The service has at its aim to include:

- A Service Desk using TOPdesk software for managing incidents and problems
- Self-service incident logging and knowledge management
- High level Configuration Management and Service Level reporting
- Change and Release Management

UniDesk isn't just for IT. It supports over 50,000 staff and students in all areas of University and College business and academic work.

Our service community with over 1000 practitioners share knowledge through workshops, reviews and training. This has been a very successful vehicle to embed best practice and help provide service excellence.

UniDesk has been developed in partnership by Abertay, Dundee, Edinburgh and St Andrews Universities. St Andrews and Edinburgh have worked together on call management provision for over 10 years. The partnership shares the cost of the service and directs service strategy and development.

Sheffield Hallam has become a user of the service since 2012.

Following the service launch we continued with

- Problem Management ·
- Self Service Portal Deployment (date to be confirmed by Unidesk Board)
- System Upgrade from 4.2 to 5.1
- Change & Release

On completion of these modules the programme team believe that the current process need to be underpinned by an element of Configuration Management (CMDB).

1.2
Scope, Objectives and Deliverables

This project will have as its objective the creation of a common CMDB populated by a common data feed, interacting with existing UniDesk processes in the same way for each institution..

This delivers several strategic business objectives :-

- this is the next step towards an integrated service desk solution
- the provisioning of an asset management system which is an aim in itself
- the underpinning of our existing UniDesk processes

Project Deliverables are therefore

- Deliver to the partners and users of Unidesk a common CMDB (MUST)
- Deliver a common CMDB that can accommodate the varying configuration items desired(MUST)
- An agreed, common Configuration Management process (MUST)
- Agreed outputs (reports, views, selections) required by the Configuration Management process (MUST)
- Ensure that any interactions with existing processes will be common (MUST)
- Use only the pre-defined tables and fields with TOPdesk CMDB (SHOULD)
- If additional tables or fields are needed within TOPdesk CMDB, then these will be common to all partners and users although not necessarily used by them all (MUST)
- Create a common intermediate 'Holding Table' (as used for current data population of students and staff) (MUST)
- Create a common feed from the Holding Table to TOPdesk (MUST)
- Specific tables or fields only needed for one institution to be avoided if possible (SHOULD)
- The delivery of data from local systems to the Holding Table is outside the project (WON'T - this is local university responsibility)
- Any load testing or performance testing as/if required (SHOULD)

So ...
The provision of data from local university systems to the Holding Table is to be funded locally.
If any university wishes to have its own specific fields and tables, then this needs to be developed as a separate and subsequent project, and will need agreement with UniDesk CAB in the future.

Each University may declare the CMDB the golden copy of data,
Each university will make the decision whether to import other golden-copy data into TOPdesk.

Also, individual institutions may want to do other work around this project, not funded by UniDesk partners.

Edinburgh, for example might wish to

- Replace or Integrate with the IS Alerts interface and process
- Replace the now aging ‘MIS Change Control System’

This means we keep in scope all common development and eschew any university-specific work and requirements.

Out of Scope

Each University or a division within may declare the CMDB the golden copy of data or elect to keep local systems as the golden copy of Configuration Items, supplying only (some of the) data to Unidesk, or they can have CMDB as the golden copy if they prefer.

The analysis of the configuration items to be held in TOPdesk is part of the project, and the construction of the 'Holding Tables' and import scripts also. However, the physical acquisition of the data from university systems into the Holding Tables is not part of the project (i.e. not funded by partners), and each institution will treat this as local development.

1.3 Benefits

CMDB will underpin the Incident, Problem and Change & Release processes.

It will establish UniDesk as a more comprehensive solution to any institutions looking for an integrated Service Management package.

1.4 Success Criteria

A CMDB process or set of processes agreed between the UniDesk partners, and within each institution.

Deliverable	Success
Deliver to the partners and users of Unidesk a common CMDB (MUST)	A CMDB of tables and fields that is the same in each university.
A common CMDB that can accommodate the varying configuration items desired (MUST)	A CMDB that can be populated as desired by each university, allowing some items to be omitted without causing integrity problems.
Any interactions with existing processes will be common (MUST)	The incident, problem and C&R processes for each university interact

	with CMDB in the same way
Use only the pre-defined tables and fields with TOPDESK CMDB (SHOULD)	Ideally, we can satisfy our requirements using the existing tables and fields available in CMDB
If additional tables or fields are needed within TOPdesk CMDB, then these will be common to all partners and users although not necessarily used by them all (MUST)	If we identify other tables or fields that we need to hold important data then these will be created for all universities, even if not populated by all.
Create a common intermediate 'Holding Table' (as used for current data population of students and staff) (MUST)	All data to be fed into UniDesk must be stored in a temporary table from which data is extracted and pulled into UniDesk DB
Create a common feed from the Holding Table to TOPdesk (MUST)	Data is extracted and pulled into UniDesk DB regularly at a (daily) time(s) as required by each university using the same script (to be developed by TOPdesk)
Specific tables or fields only needed for one institution are outside the project (WON'T)	We will not consider tables and fields that are specific for one university to be within scope
The delivery of data from local systems to the Holding Table is outside the project (WON'T)	Each university will fund its own development for populating the holding tables that feeds CMDB

1.5 Approach

As stated, the project aims to keep data items as close to those already set in the default tables and fields, this being a first phase of CMDB implementation.

We will have a core team that will work on this first iteration, comprised of - for Edinburgh - IS Applications and USD and Networks leading on software and networks - and St Andrews and Abertay.

We shall tackle each of the default configuration groups in turn - software, hardware, networks - working with the core team but bringing in additional business representatives as required for the individual analysis.

The five default objects (tables and fields) with TOpdesk which we hope to use as-is without additional fields or tables are

Object (table)	typical configuration items	'most interested' stakeholders
Hardware	desktops, laptops, servers, printers	Abertay Edinburgh OCS Group
Software	licenses, packages, bespoke apps	Edinburgh Apps Management
Networks		St Andrews Edinburgh Networks
Telephones		Edinburgh Networks
Inventory	furniture, stuff	

A sixth default table is Configurations, allowing the grouping of the above objects. However, the use of this is optional and may be superceded by the use of Father-Child relationships within CMDB.

The use of Location Field within UniDesk also needs to be assessed, as this may have to be redefined.

1.6 Timeline

These wil be used to set formal intermediate Milestones between now and Delivery once Project Brief is signed-off by partners and WIS give permission for project to proceed.

Project brief for 9th August

Analysis of data items by all partners through August.

Workshop with TOPdesk w/c 2nd September.

Follow Up workshop with TOPdesk first week of October.

Development on Holding Tables and Import scripts, and population of data, October and November.

Deliver first iteration of CMDB late November/early December.

Decision to continue onto a second iteration depending on need and budget by Unidesk Project Board in December.

The following draft timeline is provided by TOPdesk, and we take this as the starting point for the project plan.

Activity nr.	Activity	Details	Output	Planning
1 – delivered by TOPdesk	Workshop CMDB	Presentation of TOPdesk	- Explanation of how TOPdesk works.	27-06-20
		Group discussions	- Insight in differences between institutes	
			- Insight in data input	
2	Preparation work	Redesign of locations in current TOPdesk installations to support CMDB	- Insight in asset types to be registered (which hardware, software, telephone systems, network components and other items need to be registered	
		Defining report requirements based on the processes (Configuration and Asset Management, Service Catalogue Management, Service Level Management, Availability Management, Capacity Management, Change Management, Release Management, Incident Management)*	- Key metrics and properties of assets that are needed for the implementation	
			- Process KPI and report definitions	
		Defining the level of detail of each object type		
3 – delivered by TOPdesk	Process design	Presentation of preparation work by the institutes	- Agreement on process design and procedures	Two day
		Top down process definition, zooming in to the required level of detail	- Scope of data registration, mandatory fields, events & actions and process integration	
		Defining scope of CMDB registration, process integration	- Agreement on data integration and data import	
		Define rights and authorisations		
		Define reports and KPI’s		

4 – delivered by TOPdesk	Process implementation	Implement blueprint of CMDB process in TOPdesk databases on a high level		One day
5	Data gathering	Collect all data to be imported in TOPdesk and prepare database, CSV, Excel or XML files	- Data sheets	
6	Data check	Check CMDB data for consistency and accuracy	- Data view	
		Prepare database view	- Import definitions	
		Prepare business logic of data lifecycle	- Field mapping	
6 – delivered by TOPdesk	Data import and key user training	Create import scripts	- CMDB data imported (one-off or periodically)	Two day
		Implement scripts and import data	- Key users and process managers are trained in the way TOPdesk is implemented and configured	
		Half a day: Explanation to key user of data import, process application management, metrics and reports		

1.7 Estimation

Estimation are for the funded work involved - the local pieces (analysis and any data gathering developments and user training) will need to be estimated and planned and budgeted for separately (around 25 days).

See https://www.projects.ed.ac.uk/project/smi003/estimation-0

Summary

IS Apps Section	Team	Estimate (Days)
Project Services	Project Services	18.4
Development Services	Development Team	
	Configuration Team	
	Development Technology	34.8
Production Management	Applications Management	14.2

	Technology Management	
Service Management	Delivery and Integration	40.6
	Multimedia	
Directors Office	Directors Office	
	Total Days	108.0

Project Milestones

Target Date	Title	Stage	Complete
15-Apr-2013	Project Start Date	Initiate	Yes
09-Aug-2013	Project Brief	Plan	Yes
05-Dec-2013	Delivery of CMDB Process and Configured Database	Deliver	No
19-Dec-2013	Project Closure	Close	No

2. Impact

2.1 Priority and Funding

This is a priority 1 project for the UniDesk programme in 2013/14.

The UniDesk partners have agreed to fund the project to a total of 158 days, 8 days in 12/13, 150 in 13/14, which includes IS Applications Service Management effort.

Consultancy of up to 8 days has been approved.

2.2 Impact and Dependencies

None.

Project Risks

Title	Impact	Probability	Status	Risk Owner
There may be CI's that a university feels it must have but are specific to that university	High	Medium	Open	Maurice Franceschi

3. Organisation

3.1 Work/Task Breakdown

Workshop on 27th June with Abertay, St Andrews, Edinburgh and TOPdesk. SHU were invited but indicated they would not be implementing CMDB in the medium term.

This workshop will be the catalyst for setting out the scope of the project, its planning and effort required.

A terms of reference document will be agreed by 30th September, and we aim to deliver before December 2013.

The project will set out tasks and new estimates with the ToR.

3.2 Resources Skills and Cost

Cost is 158 days, 150 of these in 13/14. Funded by Unidesk partners. This is a provisional estimate.

Note that this estimate is for 108 Days of Applications effort (project management and development/support teams) and 50 days Service Management.

The project will set out tasks and new estimates with the ToR.

Project Stakeholders

Name	Business Area	Role	Communication Plan
Colin Bassant	TOPdesk	TOPdesk CMDB Consultant	regular emails and calls
Matt Beilby	IS Applications Service Management	UniDesk Administrator	team meetings
Rik Prins	TOPdesk	TOPdesk , Account manager	regular emails and calls
Guy Chen	TOPdesk	TOPdesk CMDB Consultant	regular emails and calls
Bryan MacGregor	USD	Project Owner	Project Board Meetings, quarterly Project Report to Board, monthly ad-hoc emails as required
Stuart McFarlane	IS Applications Service Management	Service Owner	Project Board Meetings, quarterly Project Report to Board, monthly ad-hoc emails as required
Kevin Donachie	User Services, St Andrew	Board Member, St Andrew	Project Board Meetings, quarterly Project Report to Board, monthly ad-hoc emails as required
Lorraine Brown	Helpdesk Manager, St Andrews	Board Member, St Andrew	Project Board Meetings, quarterly Project Report to Board, monthly ad-hoc emails as required
Frazer Greig	Manager, IT Services, Abertay	Board Member, Abertay	Project Board Meetings, quarterly Project Report to Board, monthly ad-hoc emails as required

Name	Business Area	Role	Communication Plan
Colin Thomson	IT Support Manager, Abertay	Board Member, Abertay	Project Board Meetings, quarterly Project Report to Board, monthly ad-hoc emails as required
Simon Marsden	IS Applications	Board Member, Edinburgh	Project Board Meetings, quarterly Project Report to Board, monthly ad-hoc emails as required
Maurice Franceschi	IS Applications	Project Manager	
Robert Gormley	USD	C&R Process Owner	team meetings ad-hoc
Stefan Keampf	CMDB Business Lead, Edinburgh	UniDesk Support and User	
Iain Fiddes	Dev Tech	CMDB Business Lead, Edinburgh	not determined yet
Paul Hutton	ITI	Rep for ITI	not determined yet
Colin Watt	Library	Repf ro Library	not determined yet
Graham Newton	Desktop Services	Rep for Desktop Services	not determined yet
Neil Bruce	USD	Rep for Helpline	not determined yet
Miles Seecharan	SHU	Rep for SHU	not determined yet
Louise Cardno	Abertay, Business Analyst	CMDB Process Lead	team meetings, emails workshopsongoing
Alex Ingles	St Andrews, Business Analyst	CMDB Business Lead, St Andrews	
Alan Boyd	Networks	Networks Rep.	

Project Estimations

Title	Spreadsheet	Stage	Date Completed
Initial Estimates		Plan	03-Jun-2013
Estimate for Project Brief	SMI003_ThreePointEstimates.xls	Plan	08-Aug-2013

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