Request Tracker 4 (RT4) Implementation Project Charter

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RT4 Team members ☺

IST: Lisa Tomalty	Lead
IST: Jeff Voskamp	Technical lead
CECA: Joe Radman	Configuration, Development, Testing
CEL: Anuja Bajaj	Testing/Requirements
ENG: Mike Hurst	Configuration, Development, Testing
ENV: Mary Burden	Testing/Requirements
Housing/IST: Mike (Hoang) Huynh	Configuration, Development, Testing
Management Sciences: Vu Huynh	Development, testing
IST-IS: Vivienne Ballantyne	Testing/Requirements
Library: Adam Savage	Configuration, Development, Testing
St. Jerome's: Tait Kelly	Configuration, Testing
(IST: Daspina Fefekos)	Testing
MFCF: Lori Suess	Testing

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Additional participants ☺

Mail list only:

- CSCF: Lawrence E Folland
- IST-IS: Mike Gaspic
- IST-Security: Mike Patterson

Security review:

- IST-Security: Terry Labach or Patrick Matlock

Testing/Mail list

- IST-ITMS: Daspina Fefekos

Project sites/group

- **SharePoint site:** https://sharepoint.uwaterloo.ca/sites/rt4/SitePages/Home.aspx

- **Exchange/connect group:** "UW-RT4", dl-UW-RT4@uwaterloo.ca

- **Project Web site:** https://uwaterloo.ca/it-service-asset-management/request-tracker-4-rt4-implementation-project

- **RT mailing lists:** http://bestpractical.com/rt/lists.html

- **RT blog:** http://blog.bestpractical.com/

Background

- RT Investigation project recommended Request Tracker (RT) v4+
  - Many new features, very customizable and expandable
  - Active user community
  - Existing expertise for RT exists on campus
  - Well liked, stable solution
  - Many issues identified can be addressed via
    - Process changes/Leveraging existing RT functionality

RT4

- Met critical requirements identified
- Works with browsers/operating systems used on campus
- Aligns with IT Strategic Planning initiatives such as
  - "Exchange high quality data and information **when, where, and how it's needed**"
  - "**...**ensure that the University community is fully enabled any time, anywhere, on their **preferred platform or device**"
- [Request Tracking Investigation Project Recommendation](#)

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Project Benefits

- Improved IT service support through
    - Collaboration between and within departments
    - Improved functionality
    - Enable processes defined by IT Best Practices project
    - Shared knowledge base
- Shared administration and development
- Ability to integrate with asset management and other systems

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BP vs ITBP, ITIL

- Best Practical (BP) is the company that develops and supports the Request Tracker system

- IT Best Practices (ITBP) project is a campus wide project that will review IT Service processes and ITIL best practices

- ITIL is …. (Best practices) guidance for IT service management …

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Introduction

- Use RT Investigation Project (2012-13) recommendations to implement RT4 in such a way that it will
    - Continue to provide a reliable system for request tracking
    - Enable processes to improve effectiveness of IT support
        - The ITBP project will address IT service and support processes

            (It was identified in the RT Investigation Project, that some of the issues related to the current RT system are related to processes)
        - As appropriate, enable workflow and functionality as defined by the ITBP Project, especially service desk operations processes for IT service support
        - The RT4 Implementation Project will be dependent on the ITBP project for direction
    - Meet the most important request tracking needs of the IT areas on campus
    - Enable collaboration between IT areas (and non-IT areas as appropriate)
    - Implement a knowledge base
    - Integrate with the service catalogue

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Related Strategic Objectives

- **From IT Strategic Plan, version 6.4:**
  - RM1 "Make the necessary technology infrastructure and resource investments"
    - Investing in helpdesk and staff support technology
  - OC2 "Take a University-wide perspective to IT"
  - OC3 "Build a cohesive knowledgeable IT community across the campus"
    - Enable communication, collaboration
    - Knowledge sharing through requests and knowledge base
  - IP5 "Continuously improve and optimize IT processes, workflow, and platforms"
    - Collaborative, structured approach to improving processes and workflow
  - U1 "Empower the user and optimize the user's experience"
    - Improve responding to requests, allow users to check progress
    - Knowledge base feature would help "build our users' knowledge and capabilities"

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Objectives/Goals-1

- Work together with all IT areas to leverage the many benefits of RT4

- Enable IT units to share, collaborate on IT incidents, requests, problems

- Upgrade the current system to the most recent version of RT4
  - Includes: necessary plug-ins, disaster recovery, backups, failover and testing machines

- Move request forms to RT4, ensure usability/accessibility of forms

- Import existing data into the new RT4 system.

- Provide training, documentation and communication

- Expand use of system to IT units on campus (faculties, Housing, Library, and other IT units who collaborate with the others or would like to use the system)

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Objectives/Goals-2

- Implement new functionality and configure the new system based on:
  - Requirement information gathered in the RT Investigation Project including:
    - Knowledge base
    - Reporting and metrics
    - Improve search feature
    - Automated workflows
  - Requirements that will come out of the IT Best Practices project (TBA)
  - Other requirements that are deemed necessary for IT support on campus
- Non-IT areas use of the system:
  - Non-IT areas may use the system. They may or may not be provided with assistance in importing data from other systems into this system.
  - RT is used by non-IT areas, and the intent is for this to continue; modifications and configuration for non-IT areas will be assessed on a case by case basis and will depend on cost/time as well as keeping RT's functionality reasonably consistent between areas

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Planning

- Phased approach, incremental changes

- Keep RT system operational and functional throughout the project.

- The Charter is high level and will be continually expanded and modified in the Project Management Plan for this project.

- The RT4 Implementation Project Management Plan and other supporting documents will be stored on the RT4 SharePoint site.

What is in scope

- The objectives listed above, including user request forms
- Form an RT administrators group to:
  – Define standards and procedures for changes and development, including use of change requests
  – Configure and administer the system and permissions
  – Develop add-ons that are needed by IT support areas
- Develop the Knowledge Base
- Install, configure and assess the SLA module for RT4.
- Testing before initial go live date and during incremental changes
- Installing RT 4.2+ with the AM component and enough memory, hard drive space, etc. for the campus to use RT 4.2+'s AM system if desired
- RTIR will be installed and configured to work as it does currently
- Follow Best Practical best practices for development to ensure that the project codebase remains compatible with future vendor releases.

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What is not in scope:

- Writing SLAs.
- Importing data for non-IT areas into the system.
- Importing data for other IT areas into the system, if deemed too complex.
- Developing the system beyond the needs of IT areas on campus
- Modification of source code or database structure
- Asset Management: no implementing/setting up/configuring of AM
- Integration with other systems on campus is possible with RT4, but the development/configuration for these integrations is not in scope
- Requirements that require development beyond what is reasonable for the project group (in terms of development time and expertise required)
- Requirements will need to be prioritized based on need and impact to IT support on campus.
- The RT4 Implementation Project Management Plan outlines the scope of this project in more detail.

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Preliminary,known risks&constraints

- Any delays in an RT 4.2 stable release would result in project delays.
- Documentation & free support for RT 4.2 may be limited & may impede the progress
- Budget may result in a slower implementation due to no support & consulting
- Information from the ITBP project will influence the project's scope and progression.
- Significant amount of time required from current RT administrators and support staff
- Staff availability:
  - Staff are busy: ability to participate in the project/development could be impacted
- Non project team staff availability for:
  - Testing system and features for their area before production
  - Develop and configure for workflow, processes for specific areas
  - Assisting in migrating their request tracking operations into the new RT4 systems
  - Enabling RT4 to work for some IT areas and to meet their needs may require significant development/configuration time from the project team and/or from the specialized IT area.
- A risk register will likely be created and hosted on the RT4 SharePoint site.

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Preliminary, known assumptions

- Able to engage enough staff to participate fully in the project and assist with development, testing and feedback.

- Able to communicate with ITBP project and implement recommended process changes

- RT4 can meet the needs of campus IT support, with configuration (and development, in some cases)

- There exists sufficient hardware for the system, testing machine, failover machine and backups

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Dependencies

- IT Best Practices project recommendations for workflow, processes, knowledge base, etc.

- If RT 4.2's built in reporting/metrics are not sufficient, reporting/metrics may be dependent on the Cognos 10 Reporting Tool being available (expected sandbox in November 2013; expected availability January/February 2014 hopefully)

- Timeline for the project maybe dependent on budget for monthly support from Best Practical.

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Budget

- Limited budget for this project.

- As of September 2013, there is no additional guaranteed budget money available for this project.

- Support or consulting from Best Practical will likely be requested(3 days of consulting have been approved)

- Also see the RT Budget spreadsheet.

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Timeline

- The timeline will be included in the RT4 Implementation Project Management Plan.
- **Start date**: Sept 2013
- **Anticipated end date**: Aug 2014

New functionality/features-1

- Reporting/metrics
- Knowledge base ("Articles")
- New user request forms (linked from service catalogue)
- Shared queue administration
- Customizable workflows - per queue
- Customizable email templates – per queue

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New functionality/features-2

- Recurring tickets
- Escalation
- Better tools for synchronizing accounts/groups with Nexus/LDAP
- Improved user interface (including ability to hide quoted text)
- Improved searching/canned searches
- Supposedly significantly faster. :-)

Proposed Approach

- **Phase 1A (late Dec 2013)**
  - Planning, clean up user accounts in RT3
  - Install and configure newest release of RT 4.2 and necessary plug-ins

- **Phase 1B (Jan-Apr 2014)**
  - Configuration/development
  - Testing
  - Ownership
  - Permissions
  - Documentation, Training, Communication
  - New Features

- **Phase 2 (May-Aug+ 2014)**
  - New Features
  - Migrations and Continual Improvement
  - Make recommendation for maintaining and keeping RT current
  - Training/Documentation for changes

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Additional information

- Charter and plan contain more details on what will be implemented in each phase and how
- Charter contains more detail regarding roles and responsibilities

Notes from first meeting

- Keep it Simple/ease of use
- Be consistent (queue to queue; processes)
- Buy in is important with commitment, collaboration
- Improved reporting with correct classification of tickets needed
- Automation (e.g. workflow, assigning tickets, etc.)
- Transparency-email sent from system should show who is CCd
- Knowledge Base (KB) (internal and external articles) ; proper permissions
- Training/documentation for users, issue solvers, queue managers (clear, simple)
- Escalation – (tier escalation; tickets not being looked at/completed)
- Time tracking: needs improvement
- RT admin group is of interest to some areas

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Charter Approval

- Team sign off (Oct. 18, 2013)
- Approval: IST Management and Dave Wallace
- Present to CTSC
- Present to UCIST

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