PinkVERIFY™ 2011 ITSM Tool Assessment Criteria

Knowledge Management

Purpose: "…[S]hare perspectives, ideas, experience and information; to ensure that these are available in the right place at the right time to enable informed decisions; and to improve efficiency by reducing the need to rediscover knowledge." (ST 4.7.1)
Activities: Establish and maintain Knowledge management strategy and governance, knowledge transfer methods and resources, knowledge artifact storage and retrieval facilities and procedures (SD 4.7.5)

General Platform Criteria Assessment Questions

PinkVERIFY # ISS #	General Platform Criterion Assessment Question
Vendor Response: (cell expands to accommodate response)	
KM-11-G-001 N/A	Does the tool use ITIL® 2011 Edition process terms and align to ITIL 2011 Edition workflows and process integrations?
Comment:	
KM-11-G-002 N/A	Does the tool have security controls in place to allow only authorized staff and users to view, open, modify, authorize and close records based on their role?
Provide an overview description of the tool's security permissions' capability, structure and authority basis (e.g.: based on role, organization, location).	
KM-11-G-003 N/A	Does the tool support designating fields as mandatory?
Provide an overview:	
KM-11-G-004 N/A	Does the tool provide out-of-the-box reports and facilitate flexible (ad hoc) report generation?
Provide an overview:	
KM-11-G-005 N/A	Does the tool facilitate the production of management reports from historical records?
Provide an overview:	
KM-11-G-006 N/A	Does the tool provide an audit trail for record information and updates? For example: IDs of individuals or groups opening, updating and closing records; dates and times of status and activities updates, types of activities
Describe:	
KM-11-G-007 N/A	Does the tool automate notification and escalation to keep IT and users informed of potential issues or progress?
Describe:	
KM-11-G-008 N/A	Does the tool provide facilities within the tool database for archiving closed records?
Describe:	

Core Criteria Assessment Questions

PinkVERIFY # ISS #	Core Criterion Assessment Question
Vendor Response: (cell expands to accommodate response)	
KM-11-C-001 15.2	Access Controls Does the tool have access controls/ permissions that can be defined by the client? Different levels of access (e.g. read-only, read/write) for users, IT staff and suppliers.
Describe (can include screenshots):	
KM-11-C-002 15.7	Data Complete/Valid Does the tool provide the means to validate new data inputs? E.g., compliance with legislation, copyright, intellectual property or existing records held.
Describe (can include screenshots):	
KM-11-C-003 15.1	Unique Reference Does the tool allocate a unique reference number to each new record/ entry?
Describe (can include screenshots):	
KM-11-C-004 15.5	Attachments Can the tool accommodate attachments in a variety of formats? E.g. emails, documents, multimedia.
Describe (can include screenshots):	
KM-11-C-005 15.10	Content Format Does the tool allow a common and structured method of capturing inputs? E.g., by the use of a form for the records as would be used for incident management.
Describe (can include screenshots):	
KM-11-C-006 15.4	Legislative Details Does the tool allow the recording of information about relevant legislation? Such as for SOX, ISO 20000 and others.
Describe (can include screenshots):	
KM-11-C-007 N/A	Does the tool allow the creation and maintenance of links between related Knowledge Records?
Describe (can include screenshots):	
KM-11-C-008 N/A	Does the tool automate the population of Knowledge Records with author and owner data, creation date, as well as any other attributes required by the organization?
Describe (can include screenshots):	

PinkVERIFY # ISS #	Core Criterion Assessment Question
Vendor Response: (cell expands to accommodate response)	
KM-11-C-009 15.12	Data Protection Can the tool control varying requirements for different records such as privacy, security, ownership and agreement restrictions.
Describe (can include screenshots):	
KM-11-C-010 N/A	Does the tool facilitate the identification of redundant or duplicate information, whether in a single record, or multiple records?
Describe (can include screenshots):	
KM-11-C-011 N/A	Does the tool automate the trending of knowledge use and identification of knowledge gaps?
Describe (can include screenshots):	
KM-11-C-012 N/A	Does the tool automate the notification of interested parties of new knowledge/solutions applicable to them?
Describe (can include screenshots):	
KM-11-C-013 N/A	Does the tool track how often a Knowledge Record is accessed or used?
Describe (can include screenshots):	
KM-11-C-014 15.14	Search & Retrieve Does the tool enable the search and retrieval of data by various search terms? E.g., the ability to search by subject, owner or date.
Describe (can include screenshots):	
KM-11-C-015 15.8	Out of Date Records Can the tool record, delete or archive out of date or unwanted information?
Describe (can include screenshots):	
KM-11-C-016 N/A	Does the tool facilitate searching of data within Knowledge Records?
Describe (can include screenshots):	
KM-11-C-017 N/A	Does the tool show the comparative relevance or importance of the information during a search? For example: most helpful,
Describe (can include screenshots):	
KM-11-C-018 15.3	External Input/Import Does the tool allow the linking to or capture of data/ information from external sources? Such as suppliers and websites.
Describe (can include screenshots):	

PinkVERIFY # ISS #	Core Criterion Assessment Question
Vendor Response: (cell expands to accommodate response)	
KM-11-C-019 N/A	Does the tool facilitate searching of content that is stored in multiple formats?
Describe (can include screenshots):	
KM-11-C-020 N/A	Does the tool automate the creation and maintenance of FAQs for customer and user access?
Describe (can include screenshots):	
KM-11-C-021 15.13	Data Importance Can the tool record when any record is likely to be important to any person or group? E.g., payroll information will be needed at the time payroll will be running.
Describe (can include screenshots):	
KM-11-C-022 15.6	Knowledge Transfer Does the tool allow the transfer of knowledge from one part of the service lifecycle to another? E.g., as would be needed from design to transition or transition to operations?
Describe (can include screenshots):	
KM-11-C-023 15.11	Data Classification Does the tool provide the means to classify data?
Describe (can include screenshots):	
KM-11-C-024 15.9	Reason for Information Does the tool allow the reason for the record to be held? E.g., for a project or a technical system.
Describe (can include screenshots):	
KM-11-C-025 15.20	Provision for specific document types Does the tool facilitate the design, transition and operation of a reliable SKMS that supports secure, versioned service management structures such as those that integrate alerts, events, incidents, service requests, problems, known errors, normal changes, standard changes, change & releases in the CMDB – with a mechanism to manage models of these.
Describe (can include screenshots):	

Integration Criteria Assessment Questions

PinkVERIFY # ISS #	Integration Criterion Assessment Question
Vendor Response: (cell expands to accommodate response)	
KM-11-I-001 15.15	Link to Incidents Can KM records be created by incident management staff?
Describe (can include screenshots):	
KM-11-I-002 15.16	Link to Problem KEDB Does the tool support the creation of known errors?
Describe (can include screenshots):	
KM-11-I-003 N/A	Does the tool integrate with Change Management to enable Knowledge Records to be quickly created from Change Records with associated links.?
Describe (can include screenshots):	
KM-11-I-004 15.18	Link to CMS Does the tool have links to the configuration management system?
Describe (can include screenshots):	
KM-11-I-005 N/A	Does the tool integrate with the CMS and CMDBs to support the association of Knowledge Records to CI Records?
Describe (can include screenshots):	
KM-11-I-006 N/A	Does the tool automate the creation of a Request For Change or Service Request when a Knowledge Record needs to be modified?
Describe (can include screenshots):	
KM-11-I-007 15.17	Link to Events Can the tool accommodate information from events?
Describe (can include screenshots):	
KM-11-I-008 15.19	Link to Availability Management Does the tool have links with AM to store and organise data?
Describe (can include screenshots):	
KM-11-I-009 15.21	Provision for specific document types Does the tool facilitate the design, transition and operation of a reliable SKMS that supports secure, versioned service management structures such as those that link the CMDB to the service portfolio (pipeline, catalogue & retired) through SDPs, ensuring that a) service models link the service strategy to the DML b) release, deployment, ITSCM, improvement and test plans link to SLAs/SLRs/OLAs/UCs linked to supporting financial data, demand data, business cases, the CSI register, policies and plans.
Describe (can include screenshots):	

PinkVERIFY # ISS #	Integration Criterion Assessment Question
Vendor Response: (cell expands to accommodate response)	
KM-11-I-010 15.23	Provision for specific document types Does the tool facilitate the transition and operation of a reliable SKMS that supports secure, versioned service management structures that link the CMS (CMDB + DML) to other repositories in the tool or outside of the tool like the AMIS, CMIS, SCMIS and SMIS?
Describe (can include screenshots):	
KM-11-I-011 15.22	Provision for specific document types Does the tool facilitate the transition and operation of a reliable SKMS that supports secure, versioned service management structures that enable management and service reporting?
Describe (can include screenshots):	
KM-11-I-012 15.24	Provision for specific document types Does the tool facilitate the design transition and operation of a reliable SKMS that supports secure, versioned service management structures that provide reliable access to technical documentation including process documentation & standard operating procedures. Process documentation to include owner, roles, responsibilities, metrics, reports, activities, procedures & work instructions?
Describe (can include screenshots):	