SERVICE INVENTORY STUDY

DEFINITIONS, CLARIFICATIONS, IMPLEMENTATION PLAN, TIMELINE

I. DEFINITIONS:

1. **Service Owner:** The division who is accountable for the delivery of the end-to-end service to the intended users/customers (see below) of the service. (Examples: WSoB; Law School; DoIT)
2. **Service Category:** The primary category to which the service belongs.
3. **Service Name:** The full name by which the service is known.
   A **service** is an end-to-end IT service that delivers value to customers; typically not named after specific products or applications. The service combines people, processes, and technology to provide outputs or results that enable business capabilities or an end user's work activities and desired outcomes.
   See further clarifications below.
4. **Service Description:** A brief description of what the service is.
5. **Primary Users/Customers:** Primary users/customers are the main constituents who use and/or benefit from the service. Users/customers internal or external.
   See further clarifications below.
   Number of Users: The number of users/customers who use and/or benefit from the service.
6. **Service Provider:** The name of the unit that provides the service.
7. **Annual Budget/Expense:** The actual costs to deliver a service—including, hardware, software, licensing, maintenance, and staff resources - which is necessary for an organization to understand financial management on a service level.
   See further clarifications below.
8. **FTE to Support:** The number of whole Full Time Equivalent employees that support the service.
   See further clarifications below.
9. **Federal/State/UW-System Mandate:** Is the service mandated by an authority such as Federal, State, or the UW-System?
10. **Accreditation**: Whether or not the service is required for or contributes to any accreditation.
11. **Divisional Use:** The names and number of divisions to which the service is available.

    Campus-wide: The service is provided campus-wide.

    >=2 Divisions/Departments: The service is provided by a division to other divisions – but not to ALL divisions (not campus-wide) - and/or to several of its departments/units. Enter the abbreviated names of the division(s) that use the service.

    1 Divisions/Departments: Service is used by one divisions or departments. Enter the abbreviated name of the division.

12. **Comments**: List the **business processes being supported by the service,** and the **outcomes that the service enables users to achieve.**

    See further clarifications below.

II. CLARIFICATIONS:

1. **IT Services**. Two types of IT services:

    a. Customer-Facing Services:

    Services are those in categories a – d, and g – h in the "Service Inventory Template" document: See further information below.

    b. Infrastructure Services:

    Core infrastructure services that directly enable customer-facing services: Services in categories e and f.

    What is a Service?
    An IT service is about the **outcomes** the service enables **users** to achieve, not the activities performed by the IT service provider. It is "a means of delivering value to customers by facilitating outcomes customers want to achieve."[1] (See also information about "**Users/Customers"** below.)

    As you define services, it is important to keep the customer and user perspectives in mind. It is necessary to understand the business process(s) that the service enables/supports, and the outcomes that the service allows users to achieve. Services need to be recognizable by those who might use them. This means that services, including what they are called, should be defined based on outcomes desired by the service consumer as well as on the value that they provide to the consumer. A service might be defined, then, as a discrete unit/element that provides functionality and value to customers.

    The definition of a service is business-oriented: Do NOT confuse processes, technologies and platforms with IT services.
    Technologies, physical products and platforms are access points to (or enablers of) an IT service. Thus, they may be bundled within a service and are relevant to a service catalog, but they aren't services in and of themselves. Together, technology, processes, products and people represent how IT services are delivered and who delivers them. It's essential to understand these distinctions because users/customers don't need (or, usually, don't want) to know how an IT service works. They just want results.

[1] *ITIL Glossary and Abbreviations*, AXELOS Limited, 2011: 51. For more information about ITIL, visit the AXELOS website.

Service Aggregation/Bundling:
Aggregate (bundle) similar services to a level that makes sense to your customers – if that is consistent with the division model. In other words, roll-up services into "packages" that make sense to your customers.

This is part of defining IT services in a language that consumers can understand: Bundle related service components into a whole service package that customers can identify and use.

Example: Help desk service should include ALL supports, regardless of the specific tool/software etc. that the service supports.

The focus is primarily on aggregation at the divisional level.

Naming/Labeling Services:

- Divisions should make an effort to use the **same name** of a service used by multiple divisions, such as Digital Measures, Event Management System (EMS), BuckyNet, etc. This will help in identifying services that are used by multiple divisions.
- The **names of the business processes** supported by the service (the **Comments** column) will also help in identifying services that are used by multiple divisions.
- It may be useful to capture aliases as well.

2. **Users/Customers:**
Users/customers are the main constituents who use and/or benefit from the service.
Two possible types of users/customers:
    - **Internal** users: Faculty, students, staff.
    - **External** users: Services provided to people outside the University, such as parents, prospective students, alumni, donors, and visitors and guests such as fans (athletics systems), and users of conference services.

    Users are those that **directly** use the service or those that **benefit** from the outcome. For example, a lecture capture service is directly used by a professor but the published lecture benefits both the professor and the students.

    Focus on customers: Define who the customer is for each IT service. For example, IT operations' customers may be end users or application development groups.

    Primary Users/Customers:

    If an IT service directly supports **several** categories, such as teaching, learning, and research:

    - Categorize the service according to the **main category** that it supports.

    If a service supports, e.g., two categories **equally**:

    - List it twice, under each of the two categories.

3. **Annual Budget/Expense (Costs):**

    - If "precise" cost information is known – enter it in the correct "bucket".

- Otherwise, use best estimates: The cost "buckets" are large enough.
- If a service uses shared server, software, and storage resources:
  - Determine the total costs of the shared resources.
  - Estimate the portion (%) of these costs for a particular service.
- If a service has its own discrete server, software, storage resources: use the cost of these dedicated resources, or estimates of these costs.
- Labor costs:
  - If labor is a shared resource (persons works on multiple services): Estimate the % of time they work on a particular service.
  - Estimation: Based on conversations/experience.
- Data collected for the IT Spend Study V2 and the list of IT titles to be used in that study should be useful in estimating the costs of services.

4. FTE to Support:

If an FTE supports multiple services: Estimate the FTE percentage for each service. (See Costs above.)

5. Comments:

- In most cases, the outcomes that the service enables users to achieve should be defined by the "business process owners," i.e., the divisional or departmental leader of the business process(s) that the service supports.
- There could be cases where the "business process owners" and "IT professionals" are one and the same.

III. IMPLEMENTATION PLAN:

a. DTAG will form a Service Inventory Subcommittee to plan and oversee the data collection process, including coordinating with other Advisory Groups: TLTAG, RTAG, the Infrastructure Advisory Group. The Subcommittee will also address questions and issues that may arise. The Exec Director for IT Planning and Strategy will work with the Subcommittee.

b. DTAG divisions will have available to them two completed Service Inventory templates:

- DoIT's services.
- VCFA services.

These example templates should help divisions in the data collection process, and in clarifying definitions and answering possible questions.

c. Responsibility for collecting divisional data: The DTAG divisional representatives, including the IT leader and the business leader. They will:

- Collect data about central divisional services.
- Engage departmental IT/business leaders (if applicable) to collect data about departmental services. Specifically:
  - Have a conversation with the group of departmental IT/business leaders that support services in each of the categories - Teaching and Learning; Research;

Administration and Business Services; etc. – and help them in collecting data about their services.
    - Aggregate the data to the divisional level (if possible). (**Note**: Collecting information about departmental services will be useful internally for the division CIO/IT leader. From the campus point of view, however, aggregating at the divisional level will be sufficient.)

d. Coordination with other groups:

- **Infrastructure Advisory Group**: Coordinate divisional services with those provided to the division by DoIT, using the DoIT completed Service Inventory template.
- **TLTAG**: Coordinate divisional teaching and learning services with teaching and learning services entered by TLTAG.
- **RTAG**: Coordinate divisional research services with research services entered by TLTAG.

e. The DTAG Service Inventory Subcommittee will need to plan and coordinate data collection from divisions that do not currently have representation on DTAG.

f. A letter will be sent to each division to explain the concept of service inventory, the reasons for collecting the data at this point in time including the intended use of the data.

g. The data should be entered into an Excel spreadsheet, according to the Service Inventory Template.

IV. TIMELINE:

a. The completed VCFA Service Inventory Template will be available in mid January, 2017.

b. The completed DTAG Service Inventory Template will be available by March 30, 2017.

c. Divisional data will be submitted to the DTAG Service Inventory Subcommittee.

d. Data will then be submitted to the Exec Dir, IT Planning & Strategy.