



Problem Management

Purpose: "...[M]anage the lifecycle of all problems from first identification through further investigation, documentation and eventual removal.." (SO 4.4.1.1)

Activities: Detection, logging, categorization, prioritization, investigation and diagnosis, workaround development, Known Error definition, resolution, closure, and major problem review (SD 4.4.5)

General Platform Criteria Assessment Questions

PinkVERIFY #	General Platform Criterion Assessment Question	
ISS #		
Vendor Response: (cell expands to accommodate response)		
PM-11-G-001 2.23	ITIL Terms	Does the tool use ITIL® terms and definitions? E.g., problem records rather than 'tickets'.
Comment:		
PM-11-G-002 2.18	Problem Record Access Control	Does the tool allow access controls to open, modify and close problems based on pre-established conditions?
Provide an overview description of the tool's security permissions' capability, structure and authority basis (e.g.: based on role, organization, location).		
PM-11-G-003 N/A	Does the tool support designating fields as mandatory?	
Provide an overview:		
PM-11-G-004 2.21	Additional Purchases	Can the tool produce management reports without additional purchases such as consultancy or products?
Provide an overview:		
PM-11-G-005 2.20	Management Reports	Does the tool produce reports from record detail captured? E.g., total number of problems over any given period, total number of active, closed, changes initiated, number of incidents addressed, problems by category, by user, by CI.
Provide an overview:		
PM-11-G-006 2.22	Audit Trail	Does the tool provide an audit trail of all problem record updates for: a) ID of individual recording the update b) Date and time of the action c) Type of action
Describe:		



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Vendor Response: (cell expands to accommodate response)	
PM-11-G-007 2.13	Problem Functional Escalation Does the tool allow a problem record to be escalated based on pre-established and manually overridden conditions? (Such as service level target, operational level target, business priority, support tier).
Describe:	
PM-11-G-008 N/A	Does the tool provide facilities within the tool database for archiving closed records?
Describe:	



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Core Criteria Assessment Questions

PinkVERIFY #	Core Criterion Assessment Question
ISS #	
Vendor Response: (cell expands to accommodate response)	
PM-11-C-001	Problem Unique Reference
2.3	Does the tool automatically allocate a unique reference to newly created records at the time of opening the record?
Describe (can include screenshots):	
PM-11-C-002	Problem Vs. Incident
2.1	Does the tool differentiate between incidents and problems?
Describe (can include screenshots):	
PM-11-C-003	Problem Date and Time
2.4	Is each problem record date and time stamped when created and again each time the record is updated?
Describe (can include screenshots):	
PM-11-C-004	Problem Source
2.5	Does each problem record contain a field or fields to display the identity of the source of reporting of the problem (event trigger, person, group)?
Describe (can include screenshots):	
PM-11-C-005	Problem Contact Details
2.6	Does each problem record contain a field or fields to display the contact information?
Describe (can include screenshots):	
PM-11-C-006	Problem Logging Manually
2.2	Can problem records be created manually?
Describe (can include screenshots):	
PM-11-C-007	Problem Categorization
2.9	Does the problem record contain hierarchical category fields to record the type of problem (Such as hardware – server – memory)?
Describe (can include screenshots):	
PM-11-C-008	Problem Assignment
2.11	Does the problem record contain a field or field(s) to assign the problem to a support department, group or individual?
Describe (can include screenshots):	



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PinkVERIFY #	Core Criterion Assessment Question
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Vendor Response: (cell expands to accommodate response)	
PM-11-C-009 2.10	Problem Prioritization Does the problem record contain a field or field(s) to assign an initial problem priority according to pre-established and manually overridden conditions? (Such as CI type, business services impacted, level of service disruption, security breach, cost to fix).
Describe (can include screenshots):	
PM-11-C-010 na	Does the tool support changing the impact and / or urgency fields and associated priority? For example: based on the associated incidents being matched to the problem change impact and priority
Describe (can include screenshots):	
PM-11-C-011 2.8	Problem Status Does the problem record contain a field or fields to record the status of the problem (Such as active, waiting, closed)?
Describe (can include screenshots):	
PM-11-C-012 2.7	Problem Symptoms Does each problem record contain a field or fields to describe the symptoms of the fault? This can include event parameters and/or user reported.
Describe (can include screenshots):	
PM-11-C-013 2.12	Problem Diagnosis Details Does the problem record contain a field or fields to sequentially record diagnostic activities?
Describe (can include screenshots):	
PM-11-C-014 2.14	Problem Resolution Date and Time Do problem records have a field or fields to record resolution information including data and time?
Describe (can include screenshots):	
PM-11-C-015 2.24	Problem Lifecycle Status Does the tool show the problem lifecycle stage? E.g., that the problem is being diagnosed, has been escalated, resolution is being applied or has been closed.
Describe (can include screenshots):	
PM-11-C-016 N/A	Does the tool facilitate the escalation and notification of problem records being worked on after defined thresholds have been reached? For example: failure to establish a root cause before a pre-define period
Describe (can include screenshots):	



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PinkVERIFY #	Core Criterion Assessment Question
ISS #	
Vendor Response: (cell expands to accommodate response)	
PM-11-C-017 2.16	Problem Resolution – Known Error Does the tool allow a known error record to be created and for that information to be visible elsewhere? (Such as CI records, incident records, change records, knowledge data and service reports).
Describe (can include screenshots):	
PM-11-C-018 2.17	Problem Resolution – Known Error Does the tool allow a known error record to be created in the development environment and for that information to be visible elsewhere (Such as CI records, incident records, change records, knowledge data, service reports).
Describe (can include screenshots):	
PM-11-C-019 N/A	Does the tool provide access to historical problem and known error data / information for use by support staff during incident and problem investigation?
Describe (can include screenshots):	
PM-11-C-020 2.19	Problem Closure Does the problem record contain a field or fields to record closure categorization?
Describe (can include screenshots):	
PM-11-C-021 2.26	Problem Classification Does the tool support a consistent problem classification schemata across the business enterprise?
Describe (can include screenshots):	
PM-11-C-022 2.27	Problem Models Does the tool support the creation and use of problem models for the resolution of dormant or underlying problems?
Describe (can include screenshots):	
PM-11-C-023 2.28	Major Problem Review Does the tool support the management and documentation of the major problem review?
Describe (can include screenshots):	



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Integration Criteria Assessment Questions

PinkVERIFY #	Integration Criterion Assessment Question
ISS #	
Vendor Response: (cell expands to accommodate response)	
PM-11-I-001	Does the tool facilitate the creation and maintenance of the linked relationships between Incident Records and associated Problem / Known Error Record(s)?
N/A	
Describe (can include screenshots):	
PM-11-I-002	Does the tool facilitate incident trending for pro-active problem identification? For example: the ability to show historical, related incidents over time
N/A	
Describe (can include screenshots):	
PM-11-I-003	Problem Resolution – Workaround Does the tool allow problem resolution to include a workaround and for that information to be visible elsewhere? (Such as CI records, incident records, knowledge data, service reports).
2.15	
Describe (can include screenshots):	
PM-11-I-004	Does the tool integrate with Change Management to enable the opening of a Request for Change Record based on a Problem / Known Error Record; and to enable the creation and maintenance of the linked relationships between the Problem and Known Error Record(s) and associated Change Record(s)?
N/A	
Describe (can include screenshots):	
PM-11-I-005	Does the tool integrate with Configuration Management Systems and Configuration Management Databases (CMDBs) to enable the creation and maintenance of the linked relationships between Problem and Known Error Records, and associated Configuration Item Records?
N/A	
Describe (can include screenshots):	
PM-11-I-006	Does the tool integrate with Configuration Management Systems or CMDBs to enable the problem support team(s) to identify, investigate, diagnose and eliminate problems?
N/A	
Describe (can include screenshots):	
PM-11-I-007	Does the tool integrate with Knowledge Management – knowledge databases to support investigations, diagnoses, root cause analysis techniques, and creating / updating workarounds, temporary fixes and resolutions?
N/A	
Describe (can include screenshots):	
PM-11-I-008	Incident Categories Does the tool provide analysis or export of incident data for analysis so problem & incident management stakeholders can monitor, improve and create incident categories?
2.25	
Describe (can include screenshots):	