

# JIRA and JIRA Service Management Configuration Services

## 1 Executive Summary

Ride Connection seeks to implement a modern IT Service Management solution using the **out-of-the-box** Atlassian Jira Service Management Cloud to improve the intake, management, fulfillment, visibility, and reporting of IT services. The implementation will establish a practical, scalable ITSM operating model that supports incident management, service requests, self-service, knowledge management, change enablement, asset/configuration visibility, reporting, and continuous improvement.

The Contractor shall provide the software configuration, implementation services, integration support, migration planning, testing, training, knowledge transfer, go-live support, and post-go-live stabilization necessary to transition from the current ITSM environment to Jira Service Management. The solution shall be configured to meet Ride Connection requirements while preserving maintainability by Ride Connection administrators after project completion.

| Area                    | Summary of Required Outcome                                                                                                                                                                                |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Primary Outcome         | A configured Jira Service Management environment supporting IT support intake, ticket lifecycle management, service catalog requests, SLAs, knowledge base, reporting, and asset/configuration management. |
| Implementation Approach | Phased implementation including discovery, design, configuration, integrations, migration, testing, training, launch, and stabilization.                                                                   |
| Operating Model         | Ride Connection-owned workflows, queues, forms, request types, approval paths, knowledge structure, dashboard/reporting model, and administrator procedures.                                               |
| Contract Fit            | Scope to be usable as Exhibit A / Scope of Work with compensation, insurance, confidentiality, data ownership, and procurement attachments handled in associated contract exhibits.                        |

It's important to note, while this initial body of work effort is focused on Jira Service Management – ITSM implementation, the contract support staff member will support additional JIRA Team workspace configuration and additional value added Use cases and work flows for Service Management as requested by Ride Connection leadership.

## 2 Response Submission Process and Requirements

The vendor shall prepare and submit a response electronically in Microsoft Word format to **Ride Connection Contracts Division** - [contracts@rideconnection.org](mailto:contracts@rideconnection.org)

The submission deadline is **5:00 p.m. Pacific Time on July 22, 2026**.

### 2.1 Company Background, History, and Experience

The vendor shall provide an overview of the company, including:

- Legal company name and location.
- Year established and length of time in business.
- Company ownership structure.
- Core services and areas of specialization.
- Experience providing similar professional or technical services.

### 2.2 Proposed Candidate Resume and Qualifications

The response shall include a current resume for the individual proposed to perform the work.

The resume and accompanying biography should clearly identify:

- Candidate's full name.
- Professional summary.
- Technical, functional, and industry expertise.
- Relevant employment history.

- Experience performing services comparable to those described in the SOW.

### 2.3 Proposed Hourly Cost

The vendor shall clearly state the proposed hourly billing rate for the candidate. The cost section should include:

| Cost Element       | Vendor Response          |
|--------------------|--------------------------|
| Proposed Candidate | [Candidate Name]         |
| Proposed Role      | [Role or Labor Category] |
| Hourly Rate        | [\$[Amount] per hour]    |

## 3 Project Goals and Success Measures

- **Improve service intake:** Provide a clear self-service help center and portal experience for employees and authorized customers to submit requests, incidents, and service needs.
- **Standardized service delivery:** Configure consistent workflows, priorities, categories, assignments, approvals, SLAs, and escalation rules.
- **Increase transparency:** Provide dashboards and reports for backlog, resolution performance, SLA compliance, workload, request trends, customer satisfaction, and recurring issues.
- **Strengthen knowledge management:** Use Confluence-powered knowledge articles to support agent productivity and customer self-service.
- **Improve asset visibility:** Establish asset/configuration data structures that support inventory, ownership, lifecycle, incident correlation, audit readiness, and change risk analysis.
- **Enable sustainable administration:** Deliver a system that Ride Connection staff can maintain without excessive vendor dependence.
- **Support future maturity:** Create a foundation for expanded ITIL practices, additional departments, enhanced automation, and advanced reporting over time.

| Success Measure      | Target / Acceptance Indicator                                                                                                         |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Portal adoption      | Core request types are available through the Jira Service Management help center and tested with representative users before go-live. |
| Ticket lifecycle     | Incidents and requests can be created, triaged, assigned, worked, resolved, closed, reopened when appropriate, and reported on.       |
| SLA management       | At least initial response and resolution goals are configured for agreed priorities and request categories.                           |
| Knowledge base       | The initial article structure is configured and linked to the portal; selected articles are searchable by both agents and customers.  |
| Asset/CMDB readiness | Initial asset schema, object types, key attributes, and relationships are configured and validated with sample or migrated data.      |
| Reporting            | Operational dashboards and scheduled/exportable reports are available for IT leadership and support teams.                            |
| Training             | Administrators, agents, managers, and end users receive role-appropriate training and documentation.                                  |

## 4 Detailed In-Scope Functional Requirements

### 4.1 Service Desk, Portal, and Request Intake

- Configure Jira Service Management help center and service project portal branding, categories, announcements, instructions, and customer-facing language.
- Configure intake channels including portal, email, and approved internal submission channels. Optional widget or API intake channels may be included if approved.
- Configure request types, request forms, required fields, conditional fields, field validation, help text, attachments, and request confirmation messaging.

- Create a service catalog structure organized by Ride Connection-approved service categories such as Accounts and Access, Hardware, Software, Network, Phones, Security, Applications, Onboarding/Offboarding, and General IT Help.
- Configure customer permissions, customer organizations where applicable, request participant rules, visibility rules, and portal access controls.
- Configure request status names and customer-facing transition messaging so requesters understand progress without exposing unnecessary internal details.

| Deliverable               | Detailed Description                                                                                                                                              | Acceptance Criteria                                                                                                           |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| Help center and portal    | Branded Jira Service Management portal with approved service categories, announcements, request type grouping, instructions, and customer-facing status language. | Portal is accessible to approved users; at least 15-25 initial request types are configured or as agreed in the final design. |
| Request forms             | Dynamic forms using agreed fields, conditional logic, required data, attachments, and validation.                                                                 | Sample users can submit test requests without agent assistance; required data is captured for routing and fulfillment.        |
| Email and MS Teams intake | Email channel is configured for the creation of work items, replies, comments, and requests for updates.                                                          | Inbound and outbound email scenarios pass test cases and do not create duplicate or misrouted requests.                       |

## 4.2 Incident Management

- Configure incident request/work types for user-reported incidents, system-reported incidents, service outages, application issues, network issues, security-adjacent IT issues, and high-priority operational disruptions.
- Configure incident workflow states such as New, Triage, Assigned, In Progress, Pending Customer, Pending Vendor, Resolved, Closed, and Reopened.
- Configure priority matrix based on impact and urgency, including definitions for critical, high, medium, low, and informational categories.
- Configure queue views for triage, unassigned incidents, priority incidents, aging incidents, breached/at-risk SLAs, pending customer, pending vendor, and recently resolved incidents.
- Configure incident notifications, escalation rules, major incident procedures if licensed, and post-incident review triggers where applicable.
- Configure incident links to affected assets, services, knowledge articles, related problems, changes, and recurring issues.

## 4.3 Service Request Management and Fulfillment

- Configure standard service request workflows for routine IT service fulfillment with differentiated approval, assignment, and tasking rules.
- Develop initial service catalog request types for new equipment, software requests, access requests, shared mailbox/group requests, device support, onboarding, offboarding, name/title changes, procurement support, and general assistance.
- Configure approval workflows for software, access, purchasing, security review, supervisor approval, and IT leadership approval where required.
- Configure task/subtask templates for multi-step fulfillment such as onboarding, offboarding, equipment deployment, software provisioning, account access, and application changes.
- Configure status updates and requester communication templates for common service requests.

## 4.4 Change Management / Change Enablement

- Configure a lightweight change management process appropriate for Ride Connection operations, avoiding unnecessary bureaucracy while improving risk awareness and auditability.
- Configure change categories such as Standard, Normal, Emergency, Maintenance, Application, Infrastructure, Security, and Vendor-led Change.

- Configure change request fields for business reason, affected service, affected asset/configuration item, implementation plan, rollback plan, testing plan, risk, impact, urgency, planned start/end, communications, and approval record.
- Configure approval paths for normal and emergency changes, including CAB or IT leadership review if required.
- Configure change calendar visibility if supported by the selected licensing tier.
- Configure links between changes, incidents, problems, assets, services, and related Jira work items.

#### 4.5 Problem Management and Root Cause Tracking

- Configure problem records for recurring incidents, unknown root causes, known errors, and systemic service issues.
- Configure problem workflow steps such as Identified, Investigation, Known Error, Workaround Identified, Fix Planned, Resolved, and Closed.
- Configure root cause fields, workaround documentation, linked incidents, affected services, permanent fix actions, and knowledge article prompts.
- Configure dashboards and reports showing recurring incidents, top problem areas, known errors, and problem-to-change relationships.

#### 4.6 Knowledge Management with Confluence

- Configure Confluence knowledge base space(s) connected to Jira Service Management.
- Configure internal-only and customer-visible knowledge article permissions.
- Define initial article templates for how-to, troubleshooting, known error, service description, standard operating procedure, and escalation guide content.
- Configure article suggestion and article linking practices for agents and portal users.
- Configure knowledge ownership, review cadence, article lifecycle, labels, categories, and retirement process.
- Migrate or recreate priority knowledge articles if source material is available and included in final migration scope.

#### 4.7 Assets, CMDB, and Software/License Tracking

- Design and configure an initial Assets schema for IT assets and configuration items, using a flexible but governed data model.
- Define object types such as User, Employee, Device, Laptop, Desktop, Mobile Device, Printer, Server, Network Device, Application, Software License, Vendor, Contract, Location, Department, Service, and Knowledge/Documentation Reference.
- Define key attributes including asset tag, serial number, assigned user, owner department, location, status, lifecycle stage, warranty, purchase date, replacement date, support vendor, related service, related software, license count, and renewal date.
- Configure relationships such as user-to-device, device-to-software, service-to-application, application-to-server, vendor-to-contract, and ticket-to-asset.
- Configure imports or data synchronization from approved systems where feasible, such as Microsoft Intune, Entra ID, SCCM/MECM, CSV exports, or other supported sources.
- Configure asset fields on incident, request, problem, and change records so agents can link affected assets and use asset details during triage and fulfillment.
- Configure reports or saved views for asset inventory, unassigned assets, expiring warranties, license renewals, devices by location, devices by user, and assets linked to high-volume incidents.

#### 4.8 SLAs, Queues, Notifications, and Automation

- Configure SLA goals for time to first response, time to resolution, pending statuses, breach warnings, and priority-based targets.

- Configure team queues for triage, assignment, priority, service category, due date, SLA breach risk, pending status, vendor dependency, approvals, and major workstreams.
- Configure automation rules for routing, priority assignment, auto-acknowledgment, approval reminders, SLA alerts, stale ticket reminders, missing information requests, closure prompts, knowledge article suggestions, and task generation.
- Configure customer and internal notifications that are clear, concise, and aligned with Ride Connection communication standards.
- Document automation ownership, rule names, triggers, conditions, actions, audit considerations, and maintenance procedures.

## 4.9 Reporting, Dashboards, and Performance Management

- Configure operational dashboards for service desk agents, managers, IT leadership, and administrators.
- Configure reports for ticket volume, category trends, SLA compliance, backlog, aging, first response, resolution time, reopen rate, customer satisfaction, workload by agent/team, pending vendor/customer status, and recurring issues.
- Configure asset and change reports where data is available, including change volume, emergency changes, asset incident history, and service impact visibility.
- Configure scheduled exports or shareable dashboards as required for leadership review, audit preparation, monthly operational review, and continuous improvement.
- Document report definitions, source fields, filter logic, refresh cadence, and report owner.

## 4.10 Integrations and Identity

- Configure Microsoft Entra ID / Azure AD authentication and user synchronization as approved by Ride Connection security staff.
- Configure SSO and user provisioning through Atlassian Guard if required and licensed.
- Configure email integration for inbound requests and outbound notifications.
- Configure Microsoft Teams and Outlook integrations where approved to support collaboration, notifications, and service workflows.
- Configure endpoint, asset, and software inventory imports from approved systems where technically feasible and included in the final integration inventory.
- Configure API or webhook-based integrations only where they are necessary, secure, supportable, documented, and approved by the Ride Connection.

# 5 Implementation of Methodology and Phases

| Phase                                            | Contractor Activities                                                                                                                                                                    | Key Deliverables                                                                   |
|--------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|
| Phase 0 - Contracting and Mobilization           | Finalize contract, confirm scope, confirm licensing assumptions, assign project team, establish communication cadence, gather access prerequisites.                                      | Executed project kickoff agenda; confirmed project contacts; initial project plan. |
| Phase 1 - Discovery and Current-State Assessment | Review current ITSM processes, tickets, categories, workflows, assets, reporting, integrations, security requirements, user groups, and pain points.                                     | Discovery findings; current-state summary; requirements traceability matrix.       |
| Phase 2 - Future-State Design                    | Design service desk operating model, request catalog, workflows, fields, priorities, SLAs, queues, notifications, asset schema, reports, security roles, and migration strategy.         | Approved solution design document and implementation backlog.                      |
| Phase 3 - Build and Configuration                | Configure Jira Service Management projects/spaces, request types, workflows, forms, queues, SLAs, automations, dashboards, knowledge base, Assets schema, permissions, and integrations. | Configured non-production or staging environment; configuration workbook.          |
| Phase 4 - Data Migration and Integration Testing | Load approved sample and production migration data; configure imports; test integrations; validate users, tickets, assets, categories, and knowledge content.                            | Migration test results; integration test results; issue log.                       |
| Phase 5 - User Acceptance Testing                | Conduct scenario-based testing with administrators, agents, managers, and representative requesters.                                                                                     | Signed UAT results or documented defects and remediation plan.                     |

|                                         |                                                                                                                                                      |                                                                                   |
|-----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| Phase 6 - Training and Change Readiness | Deliver role-based training, job aids, quick reference guides, admin documentation, and go-live communications support.                              | Training completion record; published support materials.                          |
| Phase 7 - Cutover and Go-Live           | Execute cutover checklist, finalize migration, enable production workflows, monitor launch, and provide hypercare support.                           | Go-live approval; production readiness checklist; daily hypercare log.            |
| Phase 8 - Stabilization and Transition  | Resolve priority issues, tune workflows and automations, confirm reporting, transfer knowledge to Ride Connection administrators, and close project. | Stabilization report; final configuration documentation; project closeout report. |

## 6 Required Deliverables

| Deliverable Category    | Minimum Expected Content                                                                                                                                                                                         |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project Management      | Project charter or kickoff deck; project schedule; RAID log; meeting agendas and notes; decision log; status reports; project closeout report.                                                                   |
| Requirements and Design | Requirements traceability matrix; future-state process design; request catalog design; workflow diagrams; field dictionary; SLA matrix; notification design; reporting design.                                   |
| Platform Configuration  | Configured Jira Service Management spaces/projects; request types; issue/work types; workflows; statuses; transitions; forms; fields; screens; queues; approvals; SLAs; notifications; automations; permissions. |
| Knowledge Base          | Connected Confluence knowledge space; article templates; permissions model; article lifecycle procedure; initial article migration or creation as agreed.                                                        |
| Assets / CMDB           | Assets schema; object types; attributes; relationships; import templates; import jobs; sample and production data loads; asset reporting views.                                                                  |
| Integrations            | Configured identity, email, Microsoft 365, endpoint/asset, and other approved integrations; integration documentation; test results.                                                                             |
| Migration               | Data migration plan; mapping workbook; cleansing rules; migrated data set; reconciliation report; archive/reference strategy for data not migrated.                                                              |
| Testing                 | Unit test scripts; system/integration test scripts; UAT plan; test results; defect log; remediation evidence.                                                                                                    |
| Training                | Administrator training; agent training; manager/reporting training; end-user/requester orientation; quick reference guides; recorded sessions if agreed.                                                         |
| Go-Live and Hypercare   | Go-live checklist; cutover plan; production launch support; hypercare schedule; stabilization issue log; transition-to-support plan.                                                                             |
| Documentation           | Configuration workbook; admin guide; operational runbook; data dictionary; automation inventory; report inventory; maintenance procedures.                                                                       |

## 7 Acceptance Criteria

| Acceptance Area          | Criteria                                                                                                                                                            |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Functional Configuration | Agreed request types, workflows, approvals, queues, forms, fields, priorities, SLAs, notifications, automations, dashboards, and reports are configured and tested. |
| Portal Readiness         | Portal is usable by representative requesters and captures complete information for the agreed initial service catalog.                                             |
| Agent Usability          | Agents can triage, assign, comment, work, link assets, use knowledge, escalate, resolve, and close tickets using configured queues and views.                       |
| Management Visibility    | Managers can review backlog, workload, SLA performance, aging, volume trends, priority items, and service categories through dashboards and reports.                |
| Asset/CMDB Data          | Approved asset schema and sample/production data imports are validated; assets can be linked to tickets and used in reporting.                                      |
| Security and Access      | Role-based permissions, portal access, identity integration, administrator access, and customer access are configured according to approved design.                 |
| Migration                | Migrated data reconciles to approved counts and sample validation criteria; known migration gaps are documented.                                                    |
| Testing Completion       | Critical and high defects are remediated or formally accepted by the Ride Connection before go-live.                                                                |
| Training Completion      | Ride Connection administrators and agents have received training and have access to documentation needed for day-to-day use.                                        |
| Go-Live Approval         | Ride Connection project sponsor or designee signs off that production readiness criteria are met.                                                                   |

## 8 Data Migration Scope

Data migration shall be limited to data sources, record types, fields, and volumes approved during discovery. The Contractor shall recommend a pragmatic migration approach that prioritizes business value and avoids importing unnecessary legacy complexity into the new platform.

| Data Object | Migration Approach | Notes / Constraints |
|-------------|--------------------|---------------------|
|-------------|--------------------|---------------------|

|                         |                                                                                                  |                                                                               |
|-------------------------|--------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| Open tickets            | Migrate or recreate active tickets as needed for operational continuity.                         | Must preserve enough context for agents to continue work.                     |
| Recently closed tickets | Optional limited historical migration or archive-only access.                                    | Final lookback period to be approved by Ride Connection.                      |
| Users/customers         | Synchronize through identity source where feasible; import portal-only customers only if needed. | Avoid duplicate users and unmanaged accounts.                                 |
| Assets                  | Import from authoritative inventory source or cleansed CSV.                                      | Source quality must be assessed before migration.                             |
| Knowledge articles      | Migrate or recreate high-value content in Confluence.                                            | Outdated content should be retired or rewritten rather than blindly migrated. |
| Categories/priorities   | Map legacy categories and priorities to simplified future-state values.                          | Legacy values should be consolidated where appropriate.                       |
| Attachments/comments    | Migrate only if technically feasible, legally appropriate, and operationally necessary.          | May increase migration effort and cost.                                       |

## 9 Security, Privacy, Records, and Compliance Requirements

- Configure role-based access controls for administrators, agents, managers, customers/requesters, knowledge authors, and read-only stakeholders.
- Configure least-privilege access for service projects, assets, knowledge spaces, reports, dashboards, and administration functions.
- Support approved authentication and user lifecycle controls, including Microsoft Entra ID integration and Atlassian Guard capabilities if licensed.
- Ensure Contractor personnel follow Ride Connection security, confidentiality, background check, data handling, and access requirements established in the final contract.
- Maintain Ride Connection ownership of configuration records, migrated data, documentation, reports, and project materials produced under the engagement.
- Document data residency, backup, recovery, audit logging, retention, export, and offboarding considerations for Atlassian Cloud and any Marketplace apps.
- Do not introduce Marketplace apps, integrations, custom scripts, or data processors without Ride Connection review and approval.
- Support Ride Connection review of cyber/privacy liability, professional liability, general liability, and other insurance requirements as applicable.

## 10 Training and Change Management

| Audience                 | Training Topics                                                                                                                                                                    | Expected Materials                                                                    |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| Administrators           | Project administration, request types, workflows, fields, screens, permissions, SLAs, automations, dashboards, Assets schema, imports, Confluence knowledge base, troubleshooting. | Admin guide, configuration workbook, runbook, automation inventory, report inventory. |
| Agents / Technicians     | Queues, triage, ticket updates, internal comments, customer communication, approvals, linked assets, knowledge articles, resolving/closing work, time tracking.                    | Agent guide, quick reference sheet, scenario exercises.                               |
| Managers / IT Leadership | Dashboards, reports, SLA performance, workload, backlog, approvals, service trends, change visibility, asset reporting.                                                            | Manager guide and reporting catalog.                                                  |
| Requesters / End Users   | Using the help center, selecting request types, checking status, replying to tickets, searching knowledge articles, providing feedback.                                            | End-user quick guide and launch communication template.                               |

## 11 Warranty, Hypercare, and Ongoing Support

- Contractor shall provide go-live hypercare for a minimum period to be defined in the final contract, recommended at 2-4 weeks after launch.
- During hypercare, Contractor shall address production defects, configuration adjustments, report refinements, automation tuning, and user support questions related to the implemented scope.
- Contractor shall define support hours, response targets, escalation path, issue severity definitions, and support handoff process.

- Contractor shall provide final as-built documentation and conduct a transition meeting with Ride Connection system administrators.
- Atlassian product support, Premium support, Marketplace vendor support, and Contractor-managed support shall be clearly differentiated in the final proposal.

## 12 Pricing and Proposal Response Requirements

The vendor proposal should provide transparent, itemized pricing. Pricing should distinguish Atlassian licensing from implementation services and optional services. Subscription timing, renewal pricing, and support costs must be clearly stated.

| Pricing Category        | Required Detail                                                                                                                                             |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Implementation services | Fixed fee or time-and-materials estimate by phase, labor category, hours, rate, deliverables, and assumptions.                                              |
| Data migration          | Data objects, volumes, number of migration cycles, included cleansing/mapping effort, exclusions, and incremental cost for additional data.                 |
| Integrations            | Included integrations, custom integration assumptions, API work, middleware, Marketplace apps, and ongoing maintenance cost.                                |
| Training                | Training sessions, number of attendees, materials, recordings, train-the-trainer, and optional additional sessions.                                         |
| Ongoing support         | Post-go-live support options, managed services, administration support, enhancement backlog support, and response targets.                                  |
| Optional functionality  | Virtual agent, advanced incident/change/problem management, additional business teams, enhanced analytics, additional Assets schemas, and Marketplace apps. |

## 13 Optional Enhancements / Future Phases

- Expansion of Jira Service Management to non-IT departments such as Facilities, HR, Finance, or Records.
- Virtual Service Agent or AI-assisted support workflows, subject to licensing, privacy, and governance review.
- Advanced incident management with major incident communications, chat/channel integration, on-call scheduling, and post-incident review workflows.
- Expanded Assets/CMDB model with service dependency mapping, vendor contract management, lifecycle forecasting, and automated reconciliation from multiple sources.
- Enhanced change management with CAB calendar, automated risk scoring, deployment integrations, and service impact analysis.
- Advanced time tracking, billing, cost allocation, or chargeback using approved Marketplace functionality if native capabilities are insufficient.
- Data warehouse or business intelligence integration for enterprise reporting beyond Jira-native dashboards.

## 14 Appendix A - Initial Service Catalog Candidates

| Service Category          | Candidate Request Types                                                                                                        |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| Accounts and Access       | New user access; password/MFA help; shared mailbox; distribution group; application access; access removal.                    |
| Hardware                  | New laptop/desktop request; device issue; printer issue; peripheral request; mobile device support; equipment return.          |
| Software and Applications | Software install; application issue; license request; application enhancement; application outage; vendor application support. |
| Network and Connectivity  | Wi-Fi issue; VPN issue; network drive access; internet issue; remote connectivity; phone/voice issue.                          |
| Security Support          | Phishing report; suspicious email; account lockout; lost/stolen device; security exception request; access review support.     |
| Onboarding / Offboarding  | New hire setup; employee transfer; role change; termination/offboarding; equipment provisioning; access checklist.             |
| General IT Help           | Question or issue not listed; consultation; how-to request; technology request review.                                         |

## 15 Appendix B - Core Fields

| Field Area | Candidate Fields |
|------------|------------------|
|------------|------------------|

|               |                                                                                                                                                                                  |
|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| All tickets   | Summary, description, requester, affected user, department, location, category, subcategory, priority, impact, urgency, status, assignee, team, due date, attachments.           |
| Incidents     | Affected service, affected asset, start time, outage/partial degradation, workaround, root cause candidate, related incidents, service impact.                                   |
| Requests      | Request type, approval requirement, business justification, requested item/service, needed-by date, fulfillment tasks, approver, cost center if applicable.                      |
| Changes       | Change type, planned start/end, affected service, affected assets, implementation plan, rollback plan, test plan, risk, impact, approvals, communications.                       |
| Problems      | Linked incidents, root cause, known error, workaround, permanent fix, change link, knowledge article link.                                                                       |
| Assets        | Asset tag, serial number, model, type, status, owner, assigned user, location, department, warranty, purchase date, replacement date, software/license, vendor, related service. |
| Time/activity | Work date, time spent, activity type, performer, internal notes, billable/non-billable if required, related task or ticket.                                                      |