

# ServiceNow Major Incident Management Process Project Kickoff

September 19, 2022

# Agenda

1. Executive Summary –
  1. Background (5 minutes)
  2. Need for Project (5 minutes)
2. Scope of work (15 minutes)
  1. In Scope
  2. Out of Scope
3. Timeline (10 minutes)
4. Approach/Process (5 minutes)
5. Communication Approach and Plan (5 minutes)

- Sponsor – Susan Roy
- Project Team – Catherine Camillone, Jen Andress, Kourt de Haas, Mallory Walker, Michelle McKenzie, Val Olivas
- Stakeholders – ITS Service Owners, ServiceNow Team, Technical Support Contacts (TSCs), University Data Center (UDC)

# Executive Summary: Background

## Major Incident Management

- Major Incident: An incident with significant business impact, requiring an immediate coordinated resolution.

Classification Matrix		Business Criticality			
		1 - Most Critical	2 - Somewhat Critical	3 - Less Critical	4 - Not Critical
Priority	P1	Major Incident		Routine Incident	
	P2	Major Incident			
	P3	Major Incident			
	P4	Major Incident			

## ITS Process

- Notify and Investigate: Incident Creator / UDC Operators / Service Owner
- Engage and Update: Incident Coordinator / Service Owner / AVP
- Resolve and Close: Service Owner / Incident Coordinator

# Executive Summary: Background

## Layers of Support

- Incident Creator
- Incident Coordinator
- UDC Operators
- Technical Support Contacts (TSCs)
- Service Desk – Tier 1 and Tier 2
- Service Owners



# Executive Summary: Need for Project

## Historical –

- February 2021 Winter Storm
- COVID – 19
- ServiceNow provides workflow and opportunities to automate portions of the Major Incident process



# Scope of Work: In Scope

- Choose and implement an automated on-call management tool
- Transition tasks suitable for workflow or automation from the ITS Major Incident Checklist to ServiceNow
- Streamline the alerts and updates of the IT Alerts and Outages page
- Add business criticality into ServiceNow for all services identified on the major incident checklist
- Develop notification of Major Incident participants to join a Team room or conference bridge based on acceptance of Major Incident
- Reduce dependence on the UDC Operators to make on-call and major incident determination decisions
- Develop and implement SLA/KPI metrics for the Major Incident Management Process in ServiceNow
- Develop documentation and train staff

# Scope of Work: In Scope

This project will workflow or automate as many of the steps in the Major Incident Process (outlined below) by taking advantage of the capabilities of ServiceNow and an on-call management tool:

1. Create an Incident in ServiceNow and propose the Incident become a Major Incident
2. Service Owner accept or reject incident escalation

If Major Incident is accepted

1. Notify ITS Problems
2. Post Update major incident to the Alerts and Outages ServiceNow
3. Send a request to join the conference bridge or major incident Team room
4. Manage the resolution and communicate with the community
5. Notify customers as well as ITS-Problems
6. Update the Alerts and Outages ServiceNow page with major incident resolution
7. Invoke the Change Process if applicable
8. Invoke the Post Incident Review Process



Major Incident Checklist		Major Incident: An incident with significant business impact, requiring an immediate coordinated resolution.													
<b>Notify &amp; Investigate</b> <input checked="" type="checkbox"/> Incident announcement and investigation <i>Incident Creator / UDC Operators / Service Owner</i>	<b>Engage &amp; Update</b> <input checked="" type="checkbox"/> Incident coordination and communication <i>Incident Coordinator/Service Owner/ AVP</i>	<b>Resolve &amp; Close</b> <input checked="" type="checkbox"/> Incident solution and report <i>Service Owner/ Incident Coordinator</i>													
<b>Incident Creator</b>	<b>Incident Coordinator</b>	<b>Incident Coordinator</b>													
<input type="checkbox"/> Contact the affected service's Service Owner / Team and propose a <b>Major Incident</b> -- If the Service Desk sees a trend of similar incidents they will notify Tier II to confirm -- Tier II will create a parent incident ticket and contact the Service Owner	<input type="checkbox"/> Decide if <b>Conference Bridge</b> is needed -- Open the <b>Conference Bridge</b> or delegate to <b>UDC Operators</b>  <input type="checkbox"/> Email new updates to <b>ITS Problems</b> -- Identify <b>Public v. Internal Communications</b> -- Provide updates to scope/impact -- Further define services/customers affected -- Share corrective actions being taken including any workarounds -- Estimate time to resolution (if possible) -- Expected timeline for next update  <input type="checkbox"/> If applicable, email <b>IT Updates</b> or targeted user list  <input type="checkbox"/> Consult <b>FAS Communications</b> to decide if: -- <b>campus-wide</b> notification is needed (email or social media) -- <b>Student Portal</b> posting is needed -- <b>UT Core Website</b> posting is needed	<i>Example: [public] The password reset issue has been identified and staff are working on a resolution.</i>  <i>Next update: 9 a.m. on Monday March 1 or as soon as service is restored.</i>  <i>[internal] The feed from TIM to Active Directory is degraded while staff work on a fix. All identity notifications have been queued to Active Directory.</i>													
<b>Service Owner (or designee)</b>	<b>Service Owner (or designee)</b>	<b>Service Owner (or designee)</b>													
<input type="checkbox"/> Email <b>ITS Problems</b> with known details, including the incident number, to acknowledge it is being investigated -- If an incident does not yet exist, the UDC Operator will create one and assign it to the appropriate group.  <i>Example: We have received reports that users are unable to reset their passwords. ITS staff are investigating.</i>	<input type="checkbox"/> Provide status updates to the <b>Incident Coordinator</b>  <b>AVP (or designee)</b>  <input type="checkbox"/> Notify senior officials and provides updates	<i>Example: Operators, please post and mark this as resolved.</i>  <i>[public] The password reset issue has been resolved. A Major Incident report will be published once the root cause investigation is complete.</i>													
<b>UDC Operators</b>	<b>Widespread Communications</b>	<b>Reminders</b>													
<input type="checkbox"/> Create outage record on <b>Alerts &amp; Outages Service Portal</b> within 10 minutes	<input type="checkbox"/> if <b>campus-wide</b> notification is warranted: -- <b>FAS Comm</b> drafts message (ITS provides initial content) -- <b>AVP or designee</b> approves the message -- <b>FAS Comm</b> distributes message to the appropriate community	<input type="checkbox"/> Only <b>University Communications</b> and <b>ITS</b> have the ability to update <b>UT Core Website</b> .													
<b>Service Owner (or designee)</b>	<b>Email Reminders</b>	<b>Service Owner (or designee)</b>													
<input type="checkbox"/> Investigate the incident and either declare a <b>Major Incident</b> or downgrade, as appropriate  <input type="checkbox"/> Identify services and customers affected  <input type="checkbox"/> Identify and engage an <b>Incident Coordinator</b> -- Depending on the issue and resource availability, a Senior Project Manager may be asked to fulfill the role of Incident Coordinator.  <input type="checkbox"/> Update <b>ITS Problems</b> to acknowledge investigation  <i>Example: Identity changes from uTexas Identity Manager (TIM) are not being delivered to Active Directory. Users who have reset their passwords since 10:30 PM may be unable to authenticate. ITS staff are investigating.</i>	<input type="checkbox"/> Define acronyms the first time they are used and avoid IT jargon <input type="checkbox"/> Always refer users to the <b>Alerts &amp; Outages</b> page for information/updates <input type="checkbox"/> Always identify <b>Public</b> information (to be posted to <b>Alerts &amp; Outages</b> ) v. <b>Internal</b> communication	<input type="checkbox"/> Schedule "lessons learned" and complete <b>Post Incident Review (PIR)</b> report  <input type="checkbox"/> Add the <b>PIR</b> report to the <b>ITS Incident Reports Wiki</b>  <input type="checkbox"/> Email the <b>PIR</b> report to <b>IT Talk</b> and targeted customer list(s) -- Include link to <b>ITS Incident Report Wiki</b>													
<b>Propose an incident as Major if it:</b>		<b>Classification Matrix</b>													
-- has a priority 1 (P1) or priority 2 (P2) using the priority matrix (page 3); and -- involves a service with a Business Criticality of "1 - most critical" or "2 - somewhat critical" (page 2).		<table border="1"> <thead> <tr> <th rowspan="2">Priority</th> <th rowspan="2">Business Criticality</th> <th>1 - Most Critical</th> <th>2 - Somewhat Critical</th> <th>3 - Less Critical</th> <th>4 - Not Critical</th> </tr> </thead> <tbody> <tr> <td>P1</td> <td rowspan="4" style="background-color: #800000; color: white; text-align: center; vertical-align: middle;"><b>Major Incident</b></td> <td rowspan="4" style="background-color: #c0c0c0; text-align: center; vertical-align: middle;"><b>Routine Incident</b></td> <td>P2</td> <td>P3</td> <td>P4</td> </tr> </tbody> </table>		Priority	Business Criticality	1 - Most Critical	2 - Somewhat Critical	3 - Less Critical	4 - Not Critical	P1	<b>Major Incident</b>	<b>Routine Incident</b>	P2	P3	P4
Priority	Business Criticality	1 - Most Critical	2 - Somewhat Critical			3 - Less Critical	4 - Not Critical								
		P1	<b>Major Incident</b>	<b>Routine Incident</b>	P2	P3	P4								

# Scope of Work: Out of Scope

Items out of scope for this effort are:

- Changes to the core ServiceNow Incident Management Process
- Replacing ITS Problems and the IT Alerts UT lists
- Additional unidentified items that are not specifically defined as In Scope

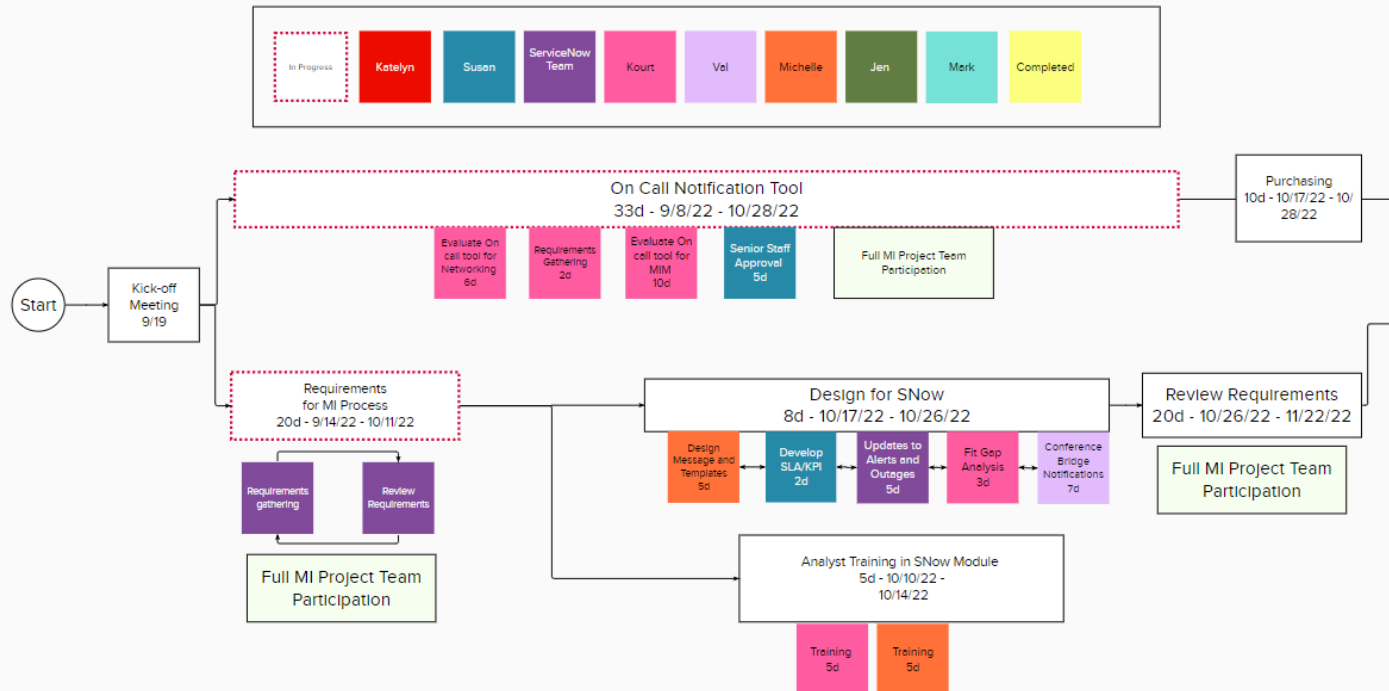
There is no expectation that additional resources will need to be assigned, long-term, for service of the process once fully implemented

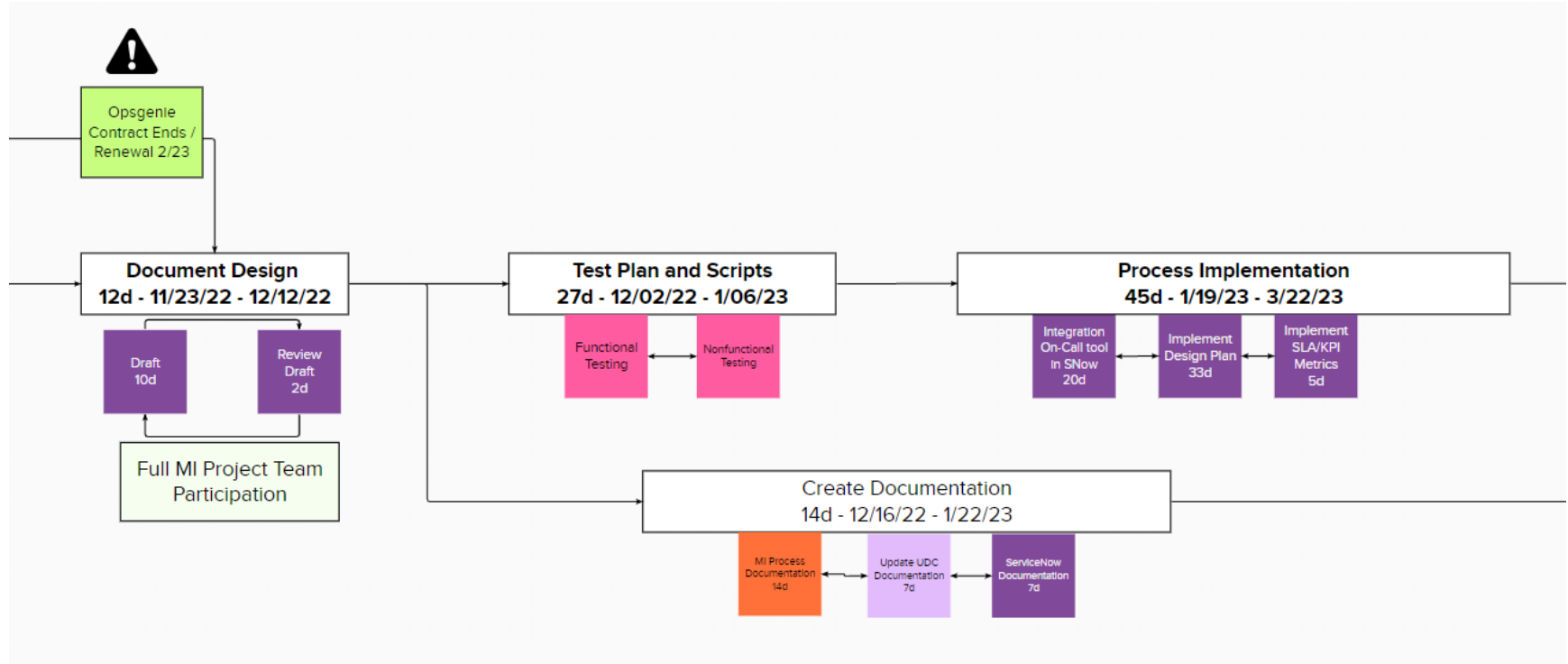
# Timeline

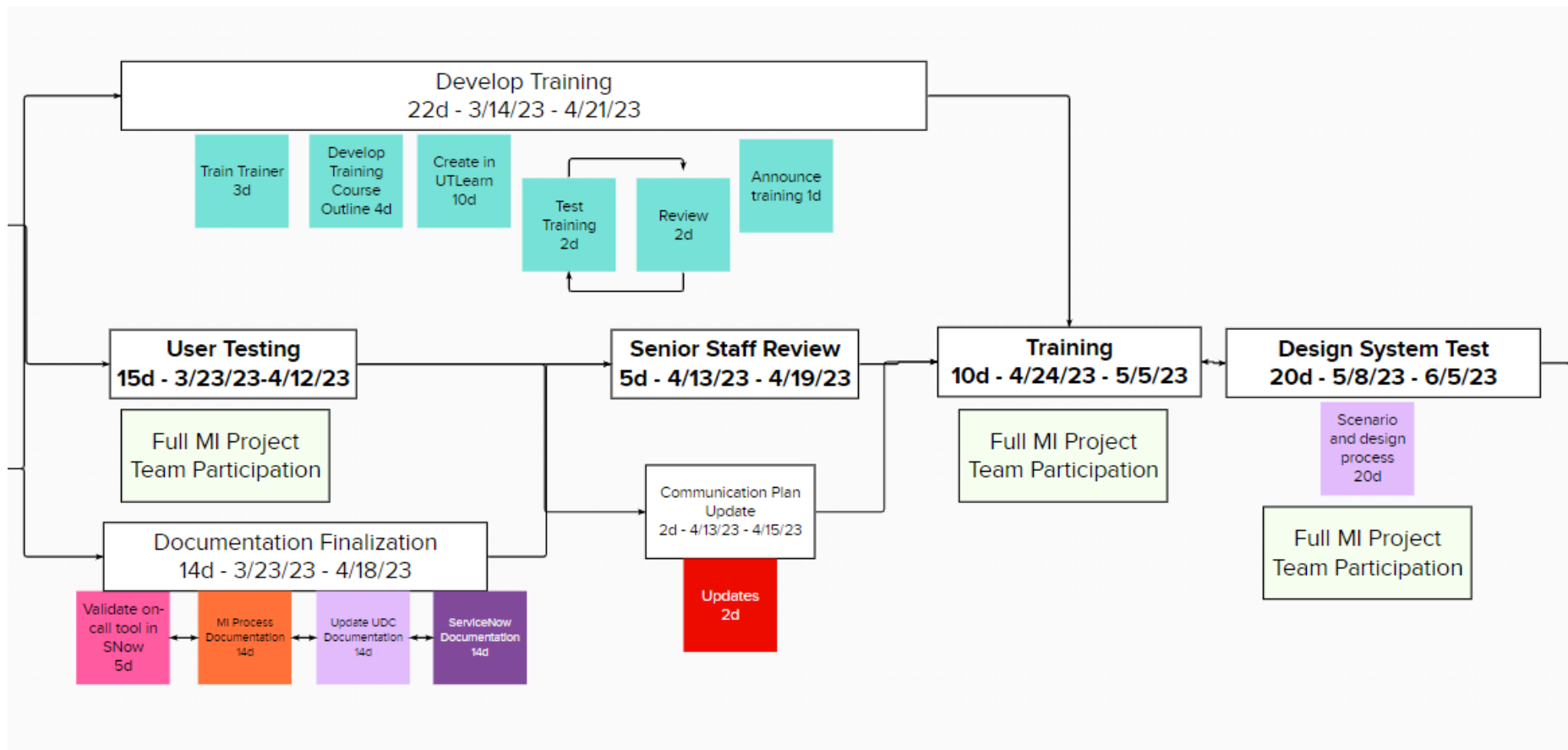
Milestone Name	Start	Finish	Q1 FY 2023			Q2 FY 2023		Q3 FY 2023		Q4 FY 2023			Q1 FY 2024				
			Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Determine On Call Tool	10/07/22	10/07/22	◆														
Purchasing	10/17/22	10/28/22		■													
Communication Plan Complete	10/21/22	10/21/22	◆														
Drafted Requirements	11/22/22	11/22/22			◆												
Documentation Complete	01/03/23	01/03/23				◆											
Testing Complete	01/25/23	01/25/23					◆										
Opsgenie Contract Ends	02/01/23	02/01/23						◆									
Implementation Complete	03/29/23	03/29/23							◆								
User Testing Complete	04/19/23	04/19/23								◆							
Approval Senior Staff	04/20/23	04/26/23									■						
Training Development Complete	04/28/23	04/28/23									◆						
Conduct Training	05/01/23	05/12/23										■					
System Test	06/30/23	06/30/23											◆				
Project Complete	07/14/23	07/14/23												◆			

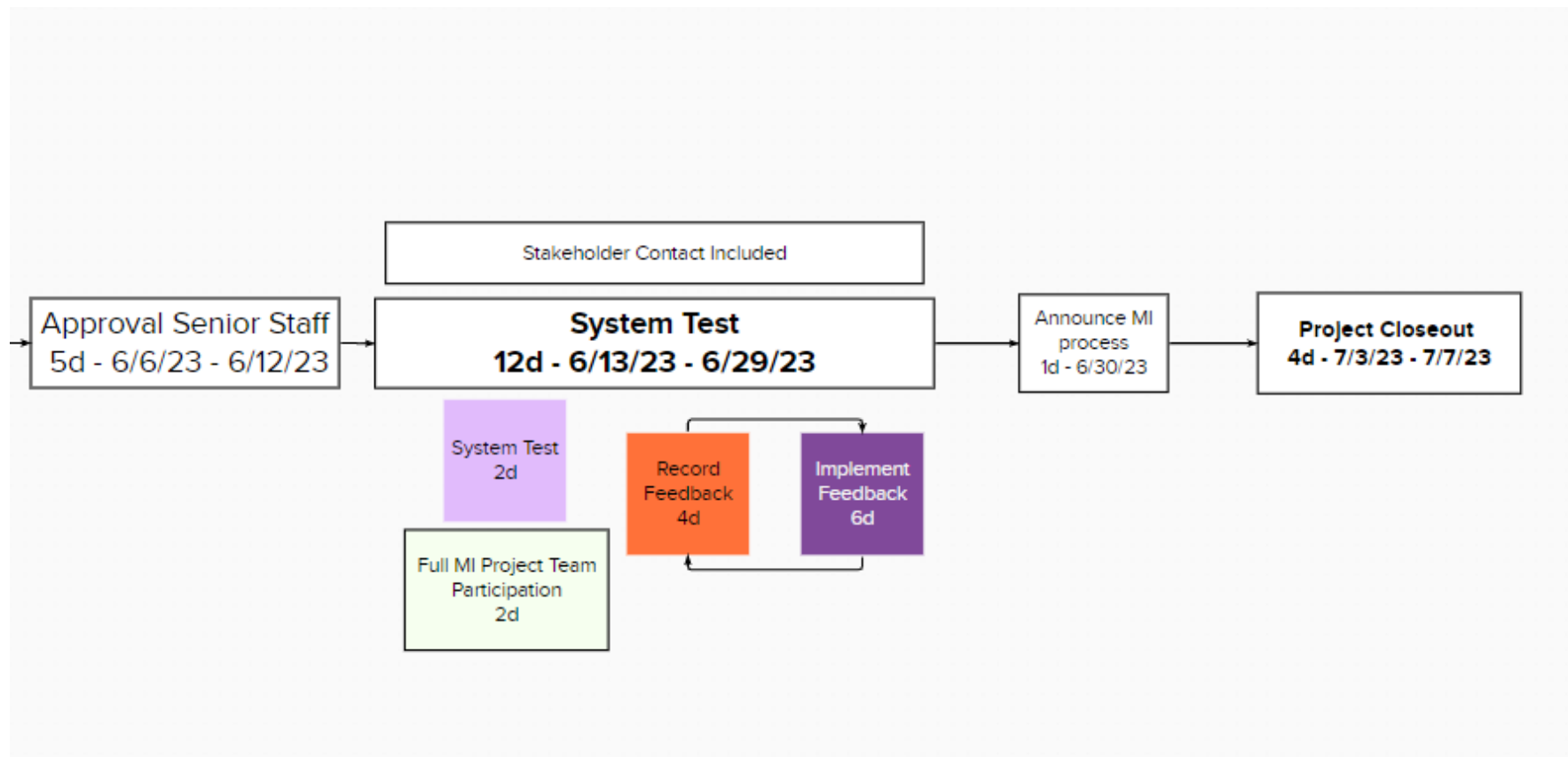
# Approach/Process

## SNOW MIM Workflow









# Communication Approach & Plan

- Project sponsor, service owners, project team** : Charter, project plan, schedule, workflow diagram, communication plan, regular status updates, risk register.

Initial Schedule	Deliverable/Mode of Communication	Update Frequency	Audience
Q1 2023	Project status report	Weekly	Stakeholders, Sponsor
Q2 2023	Test results	Once	Stakeholders
Q4 2023	Release of process (deployment announcement)	Once	ITS
As needed	Project change requests	As needed	Sponsor
As needed	Schedule & budget change requests	As needed	Sponsor

