

ServiceNow Implementation

Project Charter

Author	Version	Changes	Date
C. Teeples	0.1	Initial Creation	11/16/2011
C. Teeples	0.2	Modified 'Project Request' text and added an 'IT Area Champions' list to the R&R section.	11/21/2011
C. Teeples	0.3	R&R section: Changed 'IT Area Champions' to 'Process Champions', added SMEs, and created list of responsibilities for both.	11/30/2011
C. Teeples	0.4	Added phases to the Scope section.	12/22/2011
C. Teeples	0.5	Major updates throughout.	01/13/2012
C. Teeples	0.6	Added Mike Pearce signoff, As-Is and To-Be Process Mapping, academic calendar risk, updated timeline, and removed establishment of an ITIL based service management framework.	01/19/2012
C. Teeples	0.7	Added 'Project Communications' to the Timeline section; Added the academic calendar as a constraint; Clarified that additional service requests will only be considered via project change requests once the analysis phase has completed; Removed process documentation from scope as it's implicit with the creation of the workflow.	01/20/2012
C. Teeples	0.8	Added clarification that the knowledgebase and loading of data from RNS is not in the Maryville SOW and will be done exclusively by USF.	1/31/2012
C. Teeples	0.9-Final	Added kickoff meeting with USF extended project team to the high level timeline.	2/14/2012

Project Request

The purpose of this project is to replace the RightNow Service (RNS) tool with ServiceNow. ServiceNow is a software-as-a-service (SaaS) application which includes many Information Technology Service Management (ITSM) modules, including Incident Management, Service Catalog, and Self Service. Phase 1 of this project is limited to the implementation of the Incident Management, Service Catalog, and Self Service modules. Additional ServiceNow modules may be added in future phases (pending funding).

USF has contracted Maryville Technologies (Maryville) to facilitate the installation and configuration of the ServiceNow Incident Management, Service Catalog, and Self Service modules, in order to improve the ticketing and workflow processes for the IT Help Desk and other service areas.

This project is part of the “Help Desk Software Evaluation and Implementation” strategic initiative, which was established in support of the USF-IT strategic goal of ‘Customer Service’ and its key objective to ‘Establish service management and communication processes that are responsive to our customers and drive increased satisfaction’.

Goals

The goal of this project is to implement the ServiceNow Incident Management, Service Catalog, and Self Service modules prior to the decommissioning of RightNow Service.

Scope

Included in the scope of this project:

- Configure the Incident Management Module in ServiceNow to provide the foundation for ITIL best practices within the USF environment, including reusable-workflows (as service-catalog items), service-level-agreements (SLAs), metrics, and periodic customer satisfaction surveys.
- Configure the Service Catalog Module in ServiceNow to support the implementation of USF service offerings. Two of the most common services requested from IT, “Technology Purchase” and “New Hire Provisioning” will be configured. During the analysis phase of this project, other common, multi-step service requests that are currently performed via manual workflow will be considered for inclusion into the project’s scope. Additional service requests to be considered for inclusion into scope will be from areas currently using RNS, especially IT HelpDesk, IT Desktop Support, UCO Travel HelpDesk, General Accounting (ETs), Financial Aid, e-Mail and Active Directory. Once the analysis phase has completed, the project change request process will be required for any other service requests to be considered.

- Configure the Self-Service Module in ServiceNow for use by USF customers, including support of NetID Single-Sign-on (especially for selection of service-catalog items), incident creation (without requiring logging in - especially for incidents regarding login), incident creation via email, and incident creation on behalf of a customer via chat, phone, or in-person.
- Setup the KnowledgeBase (KB) in ServiceNow, and initially populate from the existing data in RNS as well as knowledge obtained during this implementation project itself. Note: This is not included in the Maryville Statement of Work and will be done exclusively by USF resources.
- Design an initial set of metrics and reports that can be enhanced over time.
- Setup appropriate security and access controls within ServiceNow, and map at least the existing RNS users to them.
- Provide a ServiceNow environment for User-Testing and Training.
- Extract and archive incident history from RNS for future reference and reporting, e.g. usage, but do not load into ServiceNow. Produce a plan for this based on feedback from the areas currently using RightNow Service.
- Decommission the current RNS system, including setting a date when no more new incidents will be allowed, followed not long afterwards by the date when RNS will be uninstalled from the server and apps.usf.edu, and e-mail notice sent to users to remove the client from their PCs.
- Communicate progress toward major milestones throughout the project to representatives the in-scope areas.

Excluded from the scope of this project:

- Integration with USF Health’s ITSM tool (Footprints)
- Migration of incidents from RightNow Service into ServiceNow
- The “complete” onboarding process as a Service-Catalog item
- Catalog/processes/workflows in ServiceNow to support the “Change Management” initiative
- Catalog/processes/workflows in ServiceNow to support a Configuration Management database
- Catalog/processes/workflows in ServiceNow to support the “Project and Portfolio Management” initiative
- Setup of ServiceNow’s Runbook and Discovery functionality
- Everything else not listed as “In Scope”

Benefits

Successful completion of this project will enable the following goals to be achieved by USF IT:

- Embrace ITIL “Best Practices” using ServiceNow as our ITSM tool.

- Streamline processes using Incident Management, Service Catalog, and Employee Self Service
- Provide better customer service to the USF community
- Provide easier and more timely access to IT services

Success Measurements

The following lists how project success will be measured:

- Successful implementation of the ServiceNow Incident Management, Service Catalog, and Self-Service modules has occurred prior to August 2012, including migration of all users who choose to migrate from RightNow Service to ServiceNow.
- Customer Satisfaction Ratings

Timeline

The following is a high level summary of the major project tasks and deliverables. See project schedule for details.

<u>Task/Deliverable</u>	<u>Timeframe</u>
Project Kickoff with Maryville Technologies	January
Project Communications	Ongoing for the life of the project
Process Definition/Requirements	January/March
Project Kickoff with the full USF Project Team	February
Analysis/Design	March/April
Incident Management Configuration	April/May
Service Catalog Configuration	April/May
Self Service Configuration	April/May
Training	May/June
UAT	May/June
Go-Live	June/July
RNS Archive & Decommission	July
Project Completion	August

Assumptions

The following is a list of assumptions:

- USF and Maryville resource with the required skills will be available when needed.

Constraints

- Must be completed prior to the RightNow Service renewal deadline.
- The project schedule must consider the academic calendar when scheduling tasks. This is particularly true for tasks such as training and User Acceptance Testing, which are heavily dependent upon the process owners, process champions, and SMEs.

Issues

Issues will be tracked on the issues log on the project team workspace.

Risks

Risks will be tracked on the risk register on the project team workspace.

Project Team, Roles & Responsibilities

Executive Sponsor: Mike Pearce

- Champion of the Project
- Provides direction for key strategies
- Provides high-level vision and enables success of the project team

Business Sponsor: Craig Woolley

- Core team member
- Overall owner of the project
- Sets and controls the project scope
- Ensures Team members understand vision of the project
- Enables open and effective communications to all levels of organization

Project Manager: Chris Teeples

- Core team member
- Plans and coordinates resources (internal and external) for all phases of project
- Creates and maintains the project schedule
- Single Point of Contact for Issues, Risks, and Project Change Requests
- Ensures the project documentation, issues, change requests, etc., are stored in the project workspace, and provides access to the project workspace

Technical Owners (System Administrators): Debbie O’Hearn, Sherry Anderson

- Core team member
- Provides insight into delivered functionality and utilization of that functionality
- Configures and maintains solution, including security and workflows
- Conducts all unit and regression testing as configurations are added or modified
- Enables and supports training of all process champions

Business Analysts: Randy Smith, Dana West

- Core team member
- Facilitates meetings with users to gather requirements as needed to ensure usefulness of the solution
- Generates appropriate process and requirements documentation
- Enables and supports training of all process champions

Process Owners: *(Refer to Project Contact List in the Project Workspace)*

- Authorized decision-maker for their area
- Commits personnel (process champion and SMEs) to the project team
- Provides support and champions their area’s effort to ensure the project’s success
- Attends scheduled meetings to stay engaged in project

Process Champions: *(Refer to Project Contact List in the Project Workspace)*

- Appointed by the process owner for the area representing
- Attends scheduled meetings to ensures area is strongly represented
- Provides project status and communications to process owners and other personnel
- Participates in all aspects of testing
- Attends training, and then provides training and on-going support to other personnel

Subject Matter Experts: *(Refer to Project Contact List in the Project Workspace)*

- Ensures that specific tasks and needs are identified and understood so the technology meets the business needs efficiently and effectively
- Participates in User Acceptance Testing

Project Approvals

Michael Pearce (Project Sponsor)

Date

Craig Woolley (Business Sponsor)

Date

Chris Teeples (Project Manager)

Date