

ServiceNow Phase I: Service Desk Consolidation Project Charter

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Revision History

Version	Date	Author(s)	Revision Notes
1.0	4/28/11	Jodi Muller	Initial Draft
1.1	5/11/11	Rebecca Nguyen	Updated Roles and Responsibilities section
1.2	5/16/11	Jodi Muller	
1.3	5/17/11	Rebecca Nguyen	
1.4	5/19/11	Rebecca	Updated Project Scope and Roles
1.5	5/23/11	Jodi	Updates based on initial review w/key group.
1.7	////11	la di	Updated Key Stakeholder to Julie, added Stakeholders, updated Project
1.6	6/6/11	Jodi	Organizational Chart.

Project Overview

The ServiceNow Phase I: Service Desk Consolidation project is the first phase of a larger ServiceNow Product Roadmap Project. The Roadmap supports the overall UCSF Operational Excellence (OE) initiative, and focuses on replacing Remedy and implementing an enterprise-wide Service Management tool for UCSF. A project charter will be developed separately for each phase of the roadmap.

This first phase of the ServiceNow Roadmap project specifically supports the Service Desk Consolidation portion of the OE initiative. The Service Desk Consolidation includes ITS, Medical Center, School of Medicine – ISU and SFGH. The consolidated Service Desk will use the same IT Service Management solution, ServiceNow. ServiceNow offers a suite of on-demand IT Service Management solutions offered via the internet and modern software as a service (SaaS). School of Medicine and Medical Center IT are currently using ServiceNow for Incident Management, Employee Self Service, Asset Management and Service Catalog (Medical Center - telephone only).

Project Scope

ServiceNow Phase I will focus on implementing the following ServiceNow modules for UCSF Service Desk groups of ITS, Medical Center, School of Medicine – ISU and SFGH:

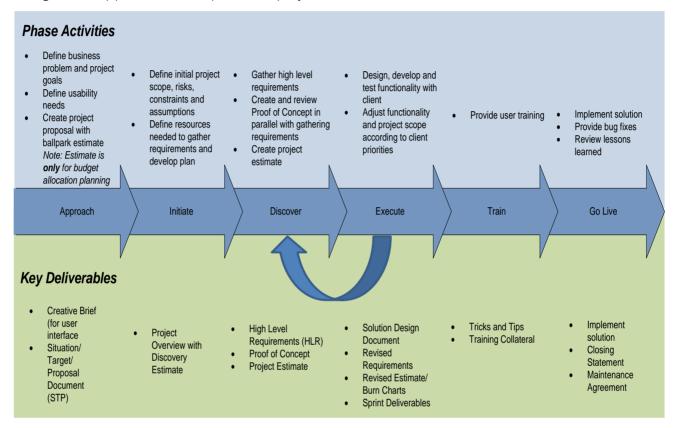
- Incident Management
 - "Fine-tune" existing Incident Management build for Medical Center and SOM –ISU to support the consolidated Service Desk Incident Management process.
 - Implement Incident for ITS and SFGH according to the consolidated Service Desk Incident Management process.
 - Service Level Agreement
 - Implement Service Level targets for ITS, Medical Center and SFGH (currently in place for SOM – ISU)
- Service Catalog
 - Build out existing Service Catalog to include current/existing online requests from ITS, SOM – ISU, SFGH, and Medical Center. (All current online services will be evaluated.)
- o Employee Self Service (ESS)
 - Build out/modify existing ESS page to integrate News and Announcements, Quick Links, Service Catalog items, Help items, knowledge search, etc. The goal is to develop a single landing page for customers.

Out of Scope

- Other IT groups, including ones using Remedy
- Non-IT groups
- New Service Catalog items

Project Approach

The project approach is a waterfall project which is a sequential software development process where we have project phases in a cascading affect. Below is the Waterfall model project management approach for this particular project:



Estimated Cost

This project will be funded by the OE Service Desk Consolidation project.

Milestones and Timeline

Milestone	Deliverable(s) Completed		
Approach and Initiate	Define scope for Phase 1		
	Define Risks, Constraints and Assumptions		
	Define ServiceNow Project Team roles and responsibilities		
	Develop initial project plan/schedule		
Discover	Gather and Document current processes for Incident and Service Catalog for ITS, Medical Center, SOM – ISU and SFGH		
	 Identify and document gaps between Incident and Service Catalog for ITS, Medical Center, SOM-ISU and SFGH 		
	Propose consolidated process		
	Obtain sign-off/approval of proposed consolidated process		
	 Review current ServiceNow build and document fixes and enhancements required to support the consolidated process. 		
	Gather and Document detailed requirements.		
Execute	Develop ServiceNow according to requirements		
	Test functionality		
	Document Training materials		
Train and Go Live	Train staff		
	Go Live		

Project Assumptions

Certain assumptions and premises need to be made to identify and estimate the required tasks and timing for the project. The project assumptions listed below are based on current knowledge today. If an assumption is invalidated at a later date, then the activities and estimates in the project plan should be adjusted accordingly.

- Only the following groups will be converted to ServiceNow during Phase 1: ITS, Medical Center IT, SOM ISU and SFGH.
- All remaining Remedy users (IT and Non-IT groups) will be converted at a later date to be determined.
- Remedy will be used in parallel with Service-Now.

Project Risks

Project risks are characteristics, circumstances, or features of the project environment that may have an adverse effect on the project or the quality of its deliverables. Known risks identified with this project have been included below. A plan will be put into place to minimize or eliminate the negative impact of each risk to the project.

		Level	
	Risk Area	(H/M/L)	Risk Plan
1.	Resources – There are competing projects that are potentially utilizing same resources.	М	Mitigation – To be determined in future Risk Mitigation Workshop session.
2.	Staff – Resistance to change by system users.	М	Mitigation Strategy - Focus needs to be placed on the system user to be involved in the implementation process. Provide information regarding the project in advance and request input during planning process. Provide regular progress communication to ensure users get adequate training and support on ServiceNow.
3.	Parallel processing – Until Remedy is retired, some users/groups may be required to do parallel processing on Remedy and ServiceNow.	М	Mitigation – To be determined in future Risk Mitigation Workshop session.

Project Constraints

- 1. Some processes/integrations will remain on Remedy until all modules are built out in ServiceNow.
- 2. Consolidated Service Desk must be in place by December 2011.
- 3. Vacant positions within ServiceNow team.

Project Dependencies

Project	Date Due	Deliverable Dependency

Roles and Responsibilities

Name	Role	Responsibilities
Opinder Bawa	Project Sponsor	 Meet regularly with Product Manager and Project Manager (bi-weekly) to review project timeline, key milestones and outstanding issues. Work with the Product Manager in identifying objectives, key deliverables, and communicating changes to all impacted areas. Share accountability for the project. Be readily available and accessible for consultation with Product Manager or Project Manager. Act as an umbrella when roadblocks occur for Product Manager, Project Manager and team - prevent scope and schedule creep. Confirm project direction and advocate for
Rebecca Nguyen	Product Manager	 the project. Meet regularly with Project Manager (weekly) to review project timeline, key milestones and outstanding issues. Be readily available and accessible for consultation with Project Manager. Act as an umbrella when roadblocks occur for Project Manager and project team. - Prevent scope and schedule creep Aid the Project Manager in lining up, getting commitment from, and managing crossfunctional support of resource needs: - Protect resources from getting pulled into other projects - Lead project budget creation and validation - Lead efforts to secure external funding Ensure project stays in line with budget. Review & approve project status reports: - Provide official backing of the project - Communicate project closure and results to organization - Act as an escalation route for the Project Manager Attend team meetings as needed to keep project on track Contribute in post-evaluation of project: key lessons learned

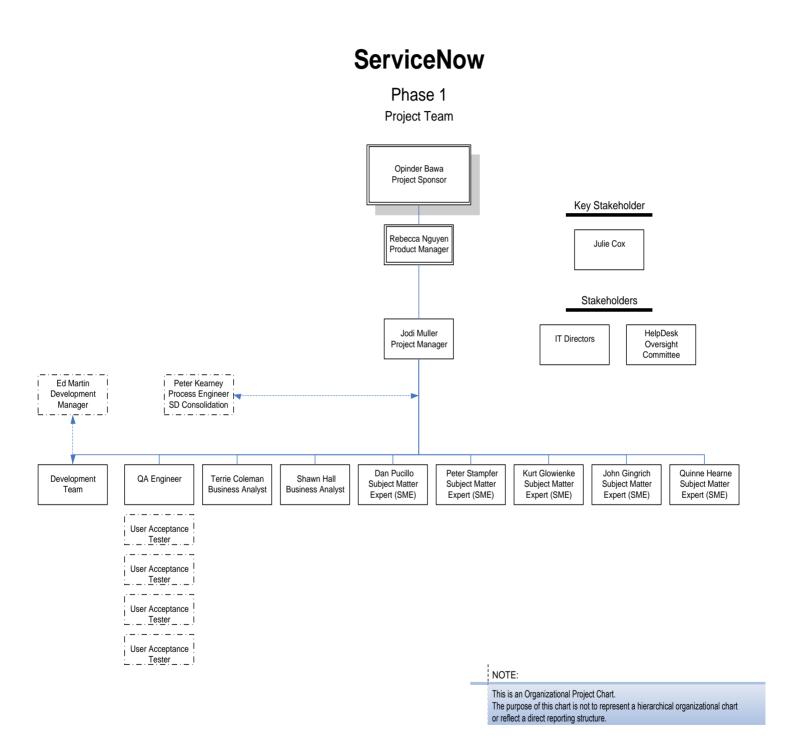
Name	Role	Responsibilities
Jodi Muller	Project Manager	 Identify, track, manage and resolve project issues. Proactively disseminate project information to Product Manager and all stakeholders. Identify, communicate and mitigate project risk. Ensure that the solution is of acceptable quality. Proactively manage scope to ensure that only what was agreed to is delivered, unless changes are approved through change management. Define and collect metrics to give a sense for how the project is progressing and whether the deliverables produced are acceptable. Manage the overall schedule to ensure work is assigned and completed on time and within budget. Prepare and distribute project status report on regular basis (weekly or bi-weekly) to Product Manager
Julie Cox	Key Stakeholder	 Review/validate/concur on project charter. Validates and communicates project objectives and goals that are aligned with the strategic goals of the stakeholders. Maintain ongoing communication with the Product Manager and Project Manager. Review/concur with project plan, costs, and overall risks. Provide guidance in cost and schedule development. Ensure project staff availability. Review, concur and participate in milestone review briefings. Prioritize any changes to project scope. Review whether stated improvements or benefits were realized from the project

Name	Role	Responsibilities
IT Directors - Kevin Barney - Jane Wong - Jose Claudio - David Rusting - Michelle Fanner HelpDesk Oversight Committee - Russ Cucina - Erik Wieland - Cathy Garzio - Rob Cotterman - Doug Carlson - Ann Dobson - Frank Farm - Mounira Kenanani - Lynda Jacobsen - Deborah Reiter - Phaedra Bell - Chris Orsine - Julie Cox - Zachary Martin - Jane Meier - Pete Kearney	Stakeholders	 Work with Product and Project Managers in providing Department domain knowledge Review, concur and participate in milestone review briefings Work with the Product Manager, Project Manager and Key Stakeholders in voicing concerns or issues impacting the success of the project to ensure any risks are mitigated and issues are resolved in a timely manner. Maintain ongoing communication with the project manager.
Terrie Coleman Shawn Hall	Business Analyst	 Conduct interviews subject matter experts to gather business processes and requirements. Document business processes, gaps and requirements. Identify and communicate any risks to Project Manager. Work closely with developer by answering/clarifying any processes or requirements.
Peter Stampfer Quinn Hearne Kurt Glowienke Dan Pucillo John Gingrich	Subject Matter Experts (SMEs)	 Work with Product and Project Managers in providing Department domain knowledge Assist Business Analyst in providing requirements. Work with the Product Manager, Project Manager and Key Stakeholder in voicing concerns or issues impacting the success of the project to ensure any risks are mitigated and issues are resolved in a timely manner. Participate in identifying potential resources in their division/unit that could assist with requirement gathering, gap analysis, user acceptance testing and training. Assist the Project Manager in identifying total number of users, divisions/units impacted by the conversion to ServiceNow.

Name	Role	Responsibilities
Ed Martin	Development Manager	 Review Functional Requirements and assign work to Developers. Insure thorough testing of all functionality and features that are outlined to be delivered. Work with the Product and Project Manager to ensure deliverables are achieved as identified.
Vacant	ServiceNow Developers	 Review, analyze and understand existing ServiceNow build and additional functionality/modules to be implemented Review business requirements to provide effective solutions. Document Functional Specifications and Technical Design on ServiceNow development. Perform analysis, code writing, debugging, testing and documenting the development of all requirements identified for this project. Perform thorough unit testing of all functionality and features that are outlined to be delivered. Create and identify development project deliverables to be added to the overall project schedule Work with the designated Project Manager to ensure deliverables are achieved as identified.
Peter Stampfer Shawn Hall	Administrators	Perform fundamental administration and configuration tasks in ServiceNow
TBD	QA Engineer	 Verify that the ServiceNow project has undergone the appropriate level of complete testing cycles to ensure successful implementation. Create and provide test plans and other test documentation as required Track/resolve both staging and production bugs. Design and prioritize test cases/scripts, along with running and verifying test scripts and report findings Work with individuals that have been identified as User Acceptance Testers to provide guidance and mentorship Create and identify testing project deliverables to be added to the overall project schedule Create and maintain bug tracking systems and test environments Sign-off on all test cases and provide go/no go recommendation to Product Manager, Project Manager and project team.

Name	Role	Responsibilities
TBD	User Acceptance Tester(s)	 Execute the test cases using sample source documents as inputs and ensure that the final outcomes of the tests are satisfactory Validate that all test case input sources and test case output results are documented and can be audited Document any problems, and work with the project team to resolve problems identified during testing Sign-off on all test cases and provide go/no go recommendation to Project Manager and project team.
Peter Kearney	Process Engineer for Service Desk Consolidation	 Work with Product and Project Managers in providing OE Service Desk Consolidation process knowledge Maintain ongoing communication with the Product Manager and Project Manager. Reviews/validates and communicates project objectives and goals that are aligned with the strategic goals of the OE Service Desk Consolidation

Project Organizational Chart



Project Approvals	
Project Sponsor — Opinder Bawa	Date
Product Manager — Rebecca Nguyen	 Date
Project Manager — Jodi Muller	Date
Director — Julie Cox Customer Services and UCSF Consolidated Help Desk	Date