STANFORD UNIVERSITY
UIT

PROJECT CHARTER FOR
SERVICENOW IMPLEMENTATION
ALPHA PHASE

October 2015

AUTHORS

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APPROVALS

Approval Date	Approved Version	Approver Role	Approver

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1. BACKGROUND

1.1. Current Situation

Stanford has used BMC's Remedy platform for over thirteen years, including the Incident, Problem, and Change Management modules, along with the more recently implemented Mobile HelpSU, and the Customer Satisfaction Survey applications. Several organizations across campus use Remedy to varying degrees (details are included in Appendix 1). The University's Remedy instance includes several standard integrations with WebAuth, LDAP, and Active Directory and other integrations. Another related system currently used by University IT for Request Management for billable services is PMG, which has several complex integrations including one with Oracle eAM (a complete list of integrations is in Appendix 2).

Stanford Health Care (SHC) has recently implemented the leading cloud-based IT Service Management (ITSM) application, ServiceNow, as a replacement for their Remedy applications. Stanford Childrens Health (SCH) also plans to implement ServiceNow. The IT support groups in Stanford's School of Medicine need to closely align with the hospitals, and have expressed a desire to use the same platform as their healthcare partners.

University IT's leadership has decided to implement a modern ITSM tool that integrates seamlessly with the University's healthcare entities, and supports the recently launched Service Management Program, the goals of which are to:
- Deliver a coherent service portfolio whereby clients are delighted with the "end-to-end" experience, and the value they receive for every service
- Deliver a "best practices" framework for all University IT services
- Unifies and optimizes processes and tools
- Provides the ability to measure and continuously improve services

After consideration of various platforms, ServiceNow, has been chosen to replace both Remedy and PMG.

1.2. Future Situation

The ServiceNow implementation is organized into several distinct blocks of activity. Some of the phases beyond Alpha (which is the focus of this charter) are subject to change and/or redefinition per the *ITSM Program and Tool Roadmap*, which is a deliverable in the Alpha Phase.
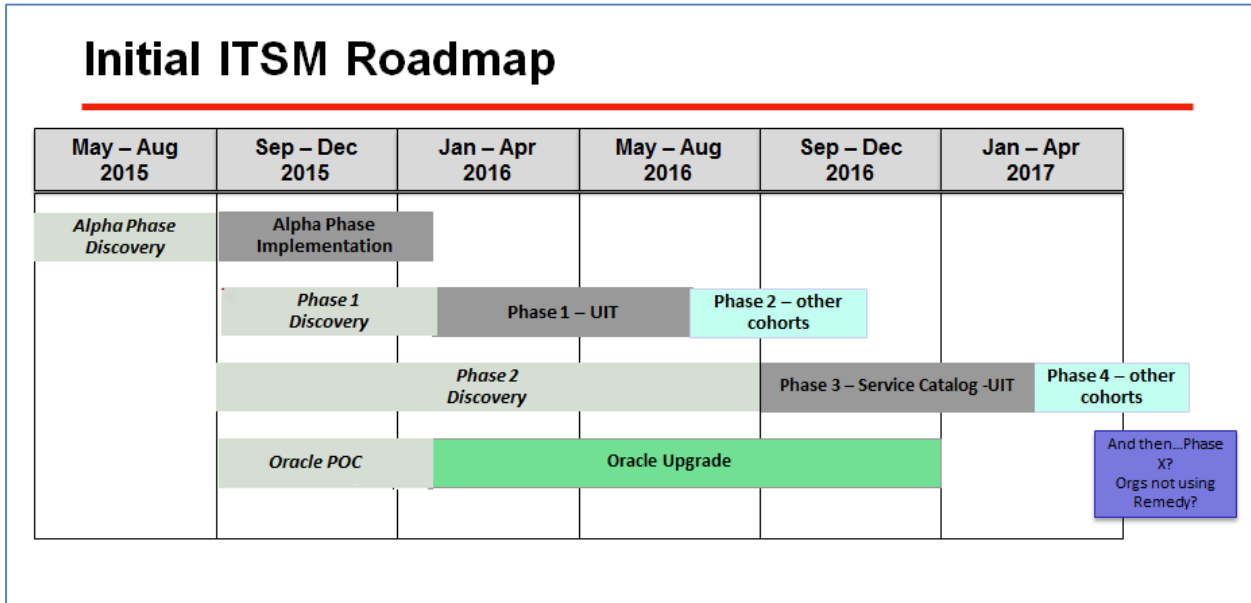
- **Alpha Phase Scope**.
  - o Release the Incident Management module, as well as Call Tracking and Chat modules for University IT (UIT) services that are delivered to Stanford Healthcare. In support of this, we will integrate the UIT instance of ServiceNow with LDAP, Avaya and WebAuth services.
  - o Include a "lite" CMDB implementation that will define the services and service taxonomy for the overall system.
  - o Include a proof of concept to understand the integration implications of ServiceNow and Oracle, given the upcoming Oracle upgrade.
  - o Include an *ITSM Program and Tool Roadmap* to facilitate the release of ServiceNow to other campus organizations, as well as to support future ServiceNow module implementations.
  - o Include a *Reporting Strategy* for consideration in subsequent phases.

The result of this phase will be a "single pane of glass", with respect to the incidents that SHC submits for UIT services. It will provide a deeper understanding of ServiceNow functionality and capability, as well as to illuminate the integration requirements for subsequent project phases.

- **Phase 1 Scope.**
  - o Release the Incident, Problem, Change, Knowledge, and non-billable Request Management modules for UIT services delivered to **all clients**, not just Stanford Healthcare. These modules will be configured based on redesigned processes that use the IT Information Library (ITIL) "best practice" framework.

- o   Include ServiceNow standard or enhanced reporting functionality per the Roadmap and Reporting Strategy developed during the Alpha Phase. The result of this phase will include the establishment of a common ITSM system and related processes across all of UIT.

- **Phase 2 Scope.** Release all of Phase 1 functionality to other University organizations that use Remedy. The result of this phase is that the University will be on a common ITSM system, based on the ITIL best practice framework.

- **Phase 3 Scope**.
    - o   Release the Service Catalog module and implement the ability to seamlessly order billable UIT services.
    - o   Release the Content and billable Request Management modules for UIT services.
    - o   Release the ServiceNow integration with eAM, which has been upgraded to Oracle 12.2.4.
    - o   Include more advanced reporting solutions per the _Reporting Strategy_.

    This phase will deliver a new Service Catalog (based on the new taxonomy) that is tightly integrated with the other ITSM modules, including Knowledge and Request Management.   This phase includes the decommissioning of Remedy.

- **Phase 4 Scope**. Deliver the Service Catalog and ordering functionality to other campus organizations; decommission PMG. This phase may include the adoption of a common front end/Service Catalog by other University organizations.

1.3. Impact to Business and/or Stanford Community

Implementing ServiceNow will facilitate the consolidation of practices among the three service delivery organizations of University IT (Administrative Systems, IT Services, and the Information Security Office), as well as both hospitals. Working within the same application framework will increase Help Desk efficiencies from a number of perspectives:

- Improved end-user experience due to complete visibility of logged issues throughout their lifecycle
- Simpler and consistent service categorization across all modules of ServiceNow
- Fewer tools resulting in fewer integrations to support
- Reduced infrastructure costs due to a cloud solution
- Consistent, repeatable processes across multiple groups
- Ability to increase functionality for minimal cost
- Common user community to share and collaborate on best practices

1.4. Key Performance Indicators (for Alpha phase only)

Results we expect to achieve through implementing ServiceNow include:

- Improved First Tier technician efficiency through enhanced functionality and process improvements. These include consolidated incident management, integrated functionality and increased visibility of tickets throughout the ticket lifecycle.
- Improved end-user satisfaction through enhanced functionality:
    - Integration between the SHC's and the University's ServiceNow instances will allow for incident status to be viewed in both systems. This should result in improved client support for those users who have multiple organizational affiliations
    - Consolidated dashboards
    - Simplified user interface
    - Chat for help
    - Simplified categorization taxonomy
    - Ability to use smart-search
- Improved ticket categorizations that lead to a better user experience, reduction of duplicate records, and an overall improvement of performance metrics
- Improved percentage of first contact resolution/fulfillment through process improvements
- Increased in the number of methods by which a user can request help. Currently clients can use HelpSU, phone and email to request assistance. With the implementation of Service Now, clients will also have chat services.
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1.5. Effects of Not Doing Project (All Phases)

#	Effects
1.	Continued fragmented ticket handling as tickets cross numerous tools and group, resulting in loss of visibility and delayed response time to users
2.	Continued proliferation of systems integrations in order to have tickets flow between departments and different tools
3.	Increased infrastructure costs to maintain and service underlying servers, software layers, etc. in support of the currently hosted solution
4.	Reliance on manual workarounds until additional integrative projects can be launched

2. APPROACH

2.1. Solution Overview

ServiceNow is a leading, cloud-based ITSM application that supports Incident, Change, Problem, Knowledge and Request Management, as well as other modules of interest. It has been implemented by several other Stanford entities including Stanford Healthcare and SLAC; in addition, Stanford Childrens Hospital will be installing their own instance. Furthermore, a long-standing UIT customer, Med-IRT, is particularly keen on using ServiceNow, as they work closely with both of their healthcare partners. Having the same ticketing and ITSM tool will greatly streamline interoperability of requests and incidents among the various Stanford units, thereby substantially increasing efficiencies.

University IT has selected ServiceNow as our provider of ITSM services. In doing so, we will provide a single, seamless system for requesting and supporting IT Services across all University and healthcare entities. We believe ServiceNow will enable us to engage in efficient and effective communication across our service and support teams, and to help provide the visibility needed to be effective in Incident, Change, Problem and Request Management processes, both internally and externally.

Additionally, we have engaged the following two implementation partners:

- Navvia to assist with the ITSM process re-engineering necessary to configure ServiceNow to meet the University business requirements. For each ServiceNow module, Navvia will conduct a one to two week workshop. During these workshops, the process owner and key participants work through process details such as roles & responsibilities, steps in the process, hand-offs, loop-backs, error conditions, etc. As of this charter, we have completed the design of two processes: Incident and Problem Management.

  Navvia also has a tool we will use to capture the process definition and the supporting Technical Design information. Last but not least, the tool offers ITIL Foundations training for free. Access to the Navvia tool is made available through WebAuth. As a result, anyone with a valid SUNet ID can access the Foundations class as well as a variety of other ITIL courses.

- Acorio has been selected as our implementation partner. Acorio will help Stanford to configure the tool to best meet our business requirements, help transition knowledge to the Stanford technical team, facilitate training, and provide UAT, rollout and post-production support. Acorio was selected after a rigorous qualification process, which included meetings with other vendors, the review of numerous versions of the SOW, pricing and scope negotiation and detailed discussions with Higher Ed references.

This project charter focuses solely on the first phase, **Alpha**. Benefits of completing the Alpha phase include:

- Process SHC's requests and incidents in an early version of the UIT ServiceNow instance that aligns with the SHC release of their ServiceNow instance

- Gain hands-on experience and apply these lessons to follow-on ServiceNow releases of Change, Problem, Knowledge, and Request Management modules in the UIT instance

- Complete a proof-of-concept of the eAM integration on the pre-upgrade and upgrade version of Oracle eBusiness Suite, and to determine a proper course of action

With the successful completion of the Alpha Phase, SHC and UIT Support Groups will be able to seamlessly work incoming Hospital-related requests and incidents of UIT services. The remaining requests will be handled by University IT Help Desks in both Remedy and ServiceNow (in a "swivel" manner) until a later phase.

2.2. In-Scope for Alpha Phase
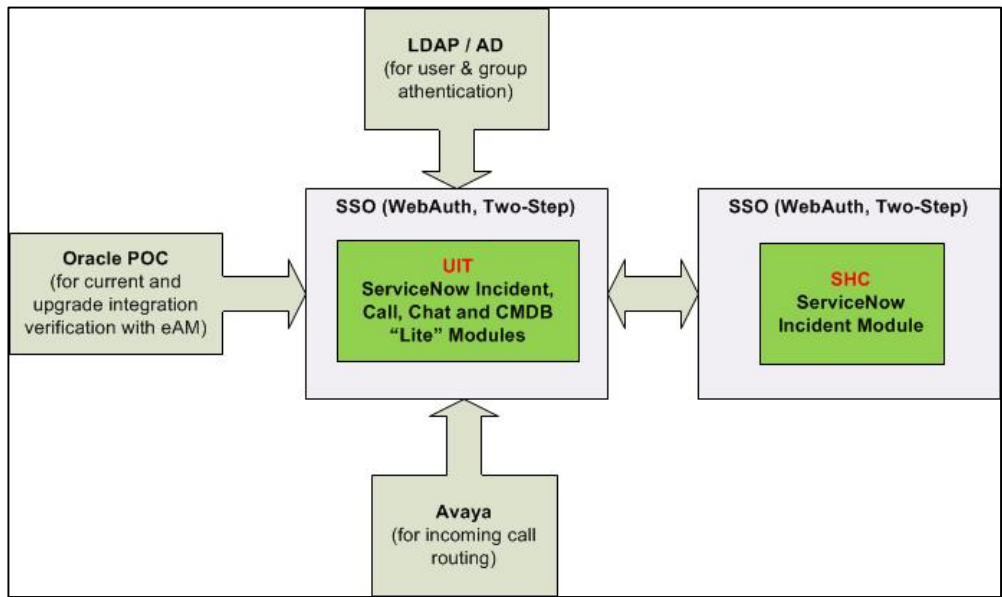
1. **For the Incident Management Process**

    a. **Business Process Flow**

        Documentation of "As-Is" and "To-Be" states that incorporate ITS, AS and ISO processes in support of Incident Management only

        - For UIT organizations: merge into one set of processes using a consistent set of terms and workflow steps.

        - For SHC: have the ability to route tickets to and from both SHC and UIT ServiceNow instances, and wherever possible in support of SHC processes

    b. **Architectural design**

    c. **Data model**

        - Identify sources for certain fields (Person Regis or LDAP) and determine whether these are reference tables in ServiceNow, look-ups facilitated through web services, synchronized tables in ServiceNow, etc.

        - Identify frequency of data demands, including on-demand, nightly, etc.

    d. Design, configure and implement the **service taxonomy** in ServiceNow

        This should help reduce the technical knowledge required by the end user in order to efficiently route their request or question.

2. **ServiceNow Modules: Incident Management, Chat, Call Monitoring** and **CMDB "Lite"**

    a. ServiceNow Forms:

        i. Configure fields that SU wants on the forms

        ii. Configure drop-down values for all fields

        iii. Configure default values

        iv. Implement any form scripting that is required (to support data dependencies or add functionality that is required and not supported)

    b. ServiceNow Workflows:

        i. With input from the Incident Business Process workshops, configure the incident process and the major incident procedure which includes workflow, task steps, routing, owners, definition of terms, etc.

        ii. For any data needs and/or dependencies, implement integrations (see below)

    c. Other core set-ups needed for the application including: Identify users, groups and roles needed to support SHC and UIT staff to ensure that tickets flow seamlessly from one instance to another.

    d. Reporting: Become familiar with available, out-of-the-box reports (no custom reports or dashboard). Rather a discovery effort will established to assess reporting needs and the appropriate tool solution (Incorta, OBIEE, Performance Analytics).

    e. Call Monitoring and Chat. Ensure that these features are turned on and configured.

3. **Integrations**:

    a. SHC/ServiceNow to UIT/ServiceNow for ticket visibility on routing, tracking, and approvals of SHC incidents and requests

    b. LDAP / AD for information regarding authenticated users and groups.

    c. SSO WebAuth / 2-Step for access security purposes

    d. Avaya for incoming call routing, to interface into the ServiceNow:Call module

    e. Oracle POC. The Oracle e-Business suite is being upgraded along a similar timeline to this project's Phase 1. Due to the eAM integration that is currently in place with PMG, an impact assessment will need to be completed during Alpha to determine scope, time and resources of accommodating the new Oracle release (12.2.4) upgrade project with ServiceNow.

4. **Phase 1 requirements gathering**:

    a. Business Process Flow workshops and Technical Design Documents for Request, Change, Problem, Knowledge

    b. Related Campus Readiness for Incident Management and any revised processes that are in progress

    c. Functional analysis of Phase 1 integrations (see Confluence for the final list of integrations, https://asconfluence.stanford.edu/confluence/display/SM/Integration+Inventory.)

2.3. Out-of-Scope

- ServiceNow UIT portal allowing for input into the UIT instance. (Only SHC tickets will be processed in the UIT instance via the SHC-UIT integration.)

- Request, Change, Problem, Knowledge Management modules. These are for the next phase, pending Roadmap discovery. **Note:** SHC makes requests but these are typically billable requests that will be handled via the current method (PMG) until phase three.

- ServiceNow has many modules that will not be considered for this release, such as Orchestration, CMDB, SDLC, Resource Management and many others.

- Service Catalog re-design. This will be included in a later phase.

- Decommissioning of Remedy and PMG. These will be included in later phases.

- Refer to Integration Inventory for a full list of planned integrations beyond the Alpha phase, https://asconfluence.stanford.edu/confluence/display/SM/Integration+Inventory.

2.4. Deliverables

#	Topic	Deliverable
	Planning	Environment Plan that addresses the needs for the following environments: DEV, INT, UAT, PRD
	Planning	Project Plan / WBS of tasks in support of Alpha
	Planning	Test Cases for QA/SIT and UAT
	Planning	Resource Plan showing staff loading
	Design	As-Is Inventory (Fit/Gap).
	Design	As-Is Incident, Change, Problem process flows – baselined
	Design	To-Be Incident, Request, Change, Problem, Knowledge process flows (this is a preliminary list and subject to change)
	Design	Technical Design Documents for all processes that drive: o Form configurations (forms, workflows, etc.) o Integrations to external systems o Leveraging of existing features in ServiceNow
	Design	Integration Specs that define: o Source/target of data o Method of data interface: web service or download to ServiceNow directly o Timing of data updates
	Design	ServiceNow System Architecture
	Strategy	Reporting Strategy

#	Topic	Deliverable
	Implementation	ServiceNow Incident / Call Tracking forms and workflows
	Implementation	ServiceNow Request forms and workflows
	Implementation	Alpha Integrations
	Implementation	Oracle eAM POC
	QA	User scenarios, End-to-end test cases, Functional tests
	Training	At a minimum, the following training will be completed by the Stanford team: • ServiceNow System Administration • Advanced System Administration • Scripting in ServiceNow • Application Creation in ServiceNow (may be needed to support complex integrations) • MID Server training (may be needed for integration)
	Documentation	Pending input from Documentation plan but could include website, email updates, eNews, etc.
	Change Management	Pending input from Change Management plan but could include town halls, one-on-ones, formal and informal presentations, etc.

2.5. Preliminary Timeline

Task Name	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Assigned To
ITSM INITIATIVE: ALPHA										
FORM ADVISORY TEAM / STAKEHOLDERS (to provide input)				green						Kathy Pappas-Kassaras
CONTRACTS			yellow							Kathy Pappas-Kassaras
PLANNING	green	green	green	green						Claudia Dencker
PROCESS-BASED SURVEYS	yellow	yellow								Vesna Siracevska
PROCESS DEFINITIONS - GENERAL	green	green								Process Owners
BUSINESS PROCESS REDESIGN / no TDD										
Incident		green	green							Jon Russell
Problem			yellow							Matthew Ricks
Request / Knowledge *				green	green					Kath Pappas-Kassaras, Jan Cicero
Change *						yellow				Larry Dillard
SERVICE CATALOG REDESIGN (TAXONOMY ONLY)	yellow	yellow	yellow	yellow						Michelle Collette
SERVICE CATALOG SURVEY				green						Michelle Collette
SERVICENOW ALPHA IMPLEMENTATION										
Stanford Team Training				green						All
ServiceNow workshops / TDD				yellow						
ServiceNow Configurations, Scripts *					green					Tech Team, Acorio
Integration Requirements				yellow						David Pax
Integration Implementation *						green				Tech Team, Acorio
ServiceNow Integration and Configuration QA **						yellow	yellow			Srinivas Mikkilineni
UAT **								green		All
SERVICENOW ALPHA GO-LIVE									yellow	All
Oracle POC					green	green	green	green		FSS Technical Team
COMMUNICATIONS				yellow	yellow	yellow	yellow	yellow	yellow	Nancy Ware
ITSM ROADMAP							green			Jeff Bubin
REPORTING STRATEGY							yellow			Sri Vemperala

*Subject to change pending Acorio's recommendations
**Dependency on implementation schedule

2.6. Project Team Organization

ServiceNow Implementation - Alpha Phase

Executive Sponsors
B. Clebsch, G. Karkala

Steering Committee
J. Cicero
B. Clebsch
C. Dencker
R. Durante
G. Karkala
K. Pappas-Kassaras
S. Steinhardt

Business Owner
Sam Steinhardt

ITSM Program Manager
Kathy Pappas-Kassaras

Project Manager
Claudia Dencker

Technical Oversight
Randy Durante

Program Lead
Vacilis Kollias

Business Analysts
Michelle Collette
Kelly Miller
Vesna Siracevska
Chris Lundin

Navvia Consultants

Process Owners
Jan Cicero, Knowledge
Larry Dillard, Change
Kathy Pappas Kassaras,
Request, SV Catalog
Matthew Ricks, Problem
Jon Russell, Incident
Tim Boswell, CMDB

Technical Manager
Raj Lalchandani

Integration Technical Lead
Sourabha Mohapatra

Reporting Manager
Sri Vemperala

ServiceNow Implementation Partner
Acorio

Roadmap
Kathy Pappas-Kassaras
Jeff Bubin

Stakeholders
tbd

User Documentation, Communications, Training
Jim Knox
Kelly Miller
Nancy Ware

QA Manager
Srinivas Mikkilineni

QA Lead
David Pax

2.7. Roles & Responsibilities

Role	Person(s)	%Time	Responsibilities
Project Sponsors	Bill Clebsch Ganesh Karkala	10% 10%	• Overall program strategy and governance • Assure program is sufficiently funded • Assure that appropriate technical resources are dedicated for the successful completion of the project • Provide executive oversight
Business Owner	Sam Steinhardt	25%	• Project strategy and governance • Assure project is sufficiently funded • Assurance that appropriate business resources are dedicated for the successful completion of the project • Oversee and resolve business related issues
ITSM Program Manager / Lead	Kathy Pappas-Kassaras (Program Manager) Vacilis Kollias (Program Lead)	50% 50%	• Oversee business resource escalations • Resolve functional escalations • Oversight of finance implementation and integration • Oversight for business requirements, user test cases, functional documents sign-off and training and communication. • Signoff Business Requirements • Signoff Functional Specifications • Approve UAT Exit Criteria • Signoff Rollout Plan
Project Manager	Claudia Dencker	100%	• Develop Project Charter • Develop and maintain Project plan (WBS) • Manage day-to-day project activities and deliverables • Responsible for the overall success of the project • Write the Rollout Plan • Project Lessons Learned • Approve UAT Exit Criteria • Other tasks as project requires
Technical Oversight	Randy Durante	25%	• Project Review • Oversight of Technical Deliverables • Review and approve System Architecture and Reporting Strategy
Business Analysts	Michelle Collette (Service Catalog Redesign, Survey) Kelly Miller (Service Catalog Redesign) Vesna Siracevska (Process	100% 100% 100%	• Elicit, analyze and document all relevant requirements • Be the coordinator for assigned focus area including arranging meetings for review

Role	Person(s)	%Time	Responsibilities
	Re-engineering, Survey) Chris Lundin (Remedy, Reporting, Metrics) Integration Analyst (David Pax) **Tbd** (SN Tool Analyst)	25% 100% 100%	• Liaison with vendors • Fulfill requests as they pertain to assigned focus area • Point person for change management activities to ensure proper adoption, i.e., be an "ambassador" for the change
Process Owners	Jan Cicero (Knowledge) Larry Dillard (Change) Kathy Pappas-Kassaras (Request, SV Catalog) Matthew Ricks (Problem) Jon Russell (Incident, Call Tracking, Chat) Tim Boswell (CMDB) ——————— Navvia Consultants	25% 25% 25% 25% 25% 25%	• Participate in workshops and help drive to decision regarding his/her assigned process • Review the Technical Design Document to ensure that it conforms to approved Navvia process documents • Point person for change management activities to ensure proper adoption; i.e., be an "ambassador" for the change • Develop use cases for each process • Be an active test participant during UAT and earlier, if required
Technical Managers	Raj Lalchandani (SN Technical Manager) Sourabha Mohrapatra (SN Integration Lead) Bhavana Tirukovalluri (SOA Technical Lead)	80% 50% 25%	• Consult with Process Owners • Review TDD designs • Ensure that all environments are set-up per project needs • Oversee SN form configurations and scripts and system integrations • Test solutions • Participate in user testing, including CRPs, as needed • Participate in project as needed • Approve UAT Exit Criteria
Reporting Manager	Sri Vemperala	25%	• Create the Reporting Strategy
RoadMap	Kathy Pappas-Kassaras Jeff Bubin	(see above) 25%	• Create the ITSM Program Roadmap
Technical Team	**SERVICE NOW** **Tbd 1** (System Administrator) **Tbd 2** (System Administrator) **ORACLE POC** Kannan Selkan (SOA Integration) Jose Rocha (PMG) **Tbd** (POC eAM Specialist) **Acorio** (ServiceNow Consultants)	100% 100% 25% 25% 100%	• Learn from the consultants with respect to tool configuration and scripting of the Incident and Call Tracking forms • Complete form configurations and scripts as directed by Acorio consultants • Unit test forms • Develop and test integrations • Prepare environments and support migration

Role	Person(s)	%Time	Responsibilities
			• Create the Technical Design Documents from the process flow inputs • Configure the Incident, Call Tracking and Chat modules • Apply any scripting to the form that is required • Work with the Integration Lead in order to implement the integrations • Unit test forms
QA Manager QA Lead QA Analyst	Srinivas Mikkilineni David Pax (Integration QA) **Tbd** (ServiceNow QA)	25% 100% 100%	• Provide guidance to the project team in terms of QA needs, schedule, resources, etc. • Develop functional and end-to-end test cases based on TDDs, process maps, use cases • Conduct functional, integration testing, and oversee user acceptance testing • Sign-off on UAT • Participate in user testing, including CRPs, as needed • Participate in project as needed • Approve UAT Exit Criteria
User Documentation, Communications, Training	Jim Knox Kelly Miller Nancy Ware	25% 25% 25%	• Web Site Updates • Presentations and supporting activities to enhance adoption • Assist with training and communications

2.8. Project Risks

#	Risk	Likelihood	Severity	Mitigation Plan
1	**Staffing**. Without reliable, qualified internal technical staff, the project cannot be successful. As charter is being finalized, internal technical resources have not yet been identified. Even after staff is identified, retaining consistent staff will be essential.	Unknown	High	Outside resources can be used, if necessary, for much of the implementation work, but internal staff must be identified and retained for production support.
2	**Vendor.** Stanford has never worked with Acorio, and because they are small and based on the East Coast, there is some risk of difficulty getting appropriate subject matter experts involved in a timely way.	Medium	Low	After a series of thorough reference checks and in-depth discussion with executive management on both sides, we believe we have a sound plan in place to mitigate this

#	Risk	Likelihood	Severity	Mitigation Plan
				risk. Ellen Daley, Acorio CEO, will be the Executive Sponsor and Project Assurance Leader.
3	**Timing Risk associated with Oracle POC.** The ideal scenario is to have a ServiceNow /eAM integration using the current version of Oracle eBusiness. If this is feasible and the risk is low to the Oracle upgrade, Phase 1 will be fully implemented by the end of Q3, 2016 (SEP). If not, Phase 1 completion could extend as late as March 2017 to allow enough time for the Oracle upgrade to stabilize.	*TBD*	*TBD*	Oracle POC is scheduled for the Alpha phase.
4	**Decision Making.** The project's tight timetable will require that decisions be made quickly and clearly, occasionally faster than some stakeholders might find comfortable.	Medium	Medium	All action items and issues will be tracked in Jira and reviewed by all project participants on a regular basis. Decisions requiring executive action will be escalated and clear deadlines established.
5	**Missed stakeholders.** This project represents a significant change for all of UIT and its customers, and yet, as stated above, is on a tight schedule. Very likely, someone will come late to the project, feel "left-out," insist on being a participant, and/or attempt to introduce new requirements.	High	High	The project team will do its best to engage all appropriate stakeholders on a timely basis. Communication will be frequent and use a variety of channels.
6	**SHC Dependency.** In August 2015, SHC went live with their ServiceNow instance and our efforts will need to be carefully coordinated with their availability.	Medium	Medium	Involve SHC early in the planning process.

3. FINANCIALS

3.1. Estimated Project Costs

Cost	Funded Amount	Operating Budget / Internal Impact	Comments
Contract Staffing:			
Administrative Systems			eAM Developer, 4 months, offshore
			(1) QA Analyst for 5 months
ServiceNow training			Includes travel expenses and training for on-site, on-line and local courses
Acorio implementation consulting services			15 weeks of Acorio professional services.
Navvia business process consultation			Represents four weeks of business process workshops for Incident, Problem, Change, Request and Knowledge Management
UX Designer / Expert	N/A		
Internal Staffing (estimated)			
AS - Onshore		(see Org Chart)	
AS - Offshore including onshore support			
Business Office		(see Org Chart)	
Vendor			
Hardware	N/A		MidServer needs moved to later phases
Software			
(3) ServiceNow instances: DEV, TEST, PRD			
Named user licenses ("Fulfiller") at $35/user per month			100 licenses for one year
ServiceNow Development "SDLC" licenses $27/user + training			23 licenses for one year + training
NAVVIA subscription services at $12,600/year for 10 licensed users (others at read-only are unlimited)			
Sub-Totals			
Budget Contingency (10%) (see section 3.4 for details)			Discovery (5%) Low Risk (10%) Medium Risk (20%) High Risk (30%)
Totals			

*Totals do not include costs associated with follow-on phases. Follow-on charters will be written and submitted prior to the conclusion of the Alpha phase.

3.2. Estimated Ongoing Support Costs

Cost	FY16	FY17	FY18	Totals
Staffing:				
Administrative Systems	1 FTE*			
Business Office	1.5 FTE			
Vendor				
Other Consulting Firms				
Hardware				
Software: ServiceNow (for 100 users only; costs will increase as ServiceNow is rolled out to more users)+ 23 "SDLC" licenses				
Software: Navvia				
ITS Charges				
EMS				
Totals				

* 1 FTE applies to Alpha only; this headcount will increase as more ServiceNow modules are brought on line in 2016.

This project will …	Operating Budget Costs	Service Center Costs
Temporarily -Increase ongoing costs	The operating costs will temporarily increase in order to support duplicate systems until the Remedy system can be decommissioned. Once Phase 3 of the project is completed (estimated FY17), we expect to see a reduction in operating costs.	The operating costs will temporarily increase in order to support duplicate systems until the PMG system can be decommissioned. Once Phase 4 of the project is completed (estimated FY18), we expect to see a reduction in operating costs.
Decrease ongoing costs		
Neutral to ongoing costs		

3.3. Estimated Funding Source

The Alpha Phase will be funded by a combination of funds from the University IT Shared Services Service Center (70%) and Business Affairs reserve funds (30%).

3.4. Contingencies

Item	Description
Scope Contingencies	• Workarounds • Prioritization of features
Schedule Contingencies	• Alternate release dates (if possible) and why these would be acceptable • Overlapping project phases and why this is acceptable
Budget Contingencies	• 10% of out-of-pocket budget • 10% extra of in-house resources resulting in over-time, borrowed resources from other projects, managers backfilling, etc.

3.5.   Flexibility Matrix

	Scope	Schedule	Resources
Least Flexible		X	
Moderately Flexible			X
Most Flexible	X		

APPENDIX A: REMEDY STATS

The following table breaks out current Remedy ticket usage by support organization:

Tickets by Support Organization	
IT Services	39.4%
Financial Management Services	17.0%
School of Medicine	10.6%
Vice Provost for Student Affairs	8.8%
Office of Development	7.5%
Administrative Systems	5.1%
Residential & Dining Enterprises	3.3%
Human Resources	3.2%
Graduate School of Business	1.0%
Research Administration	0.8%

Monthly tickets: 18,000-30,000 (50% web created)
Average tickets since July 2014: 24,000 tickets/month
Over 5,000 categorizations

Additionally there are seven web-based self-submission portals,

- Medical School
- Graduate School of Business
- Residential and Dining Enterprises
- Office of Development (Alumni Support) 2 portals
- University HR (Benefits)
- Stanford Management Company
- Medical Center Development (due to go live April 2015)

APPENDIX B: INTEGRATION INVENTORY

For the most recent information regarding integrations, as well as a list of systems that were reviewed, but determined to be out of scope, please go to Confluence, https://asconfluence.stanford.edu/confluence/display/SM/Integration+Inventory. While Oracle eAM integration is not needed until a later phase, an Oracle POC will be conducted during Alpha (POC not listed below).

System	Purpose	Existing in Remedy or New in Service Now	Comments	User Population	Phase of project
LDAP	For information re. University authenticated users. Includes the SHC LDAP.	Existing	Remedy creates person information at the time of ticket creation by doing a one-time LDAP look-up. Should this method continue or should there be regular dumps from LDAP?	All	Alpha
Avaya	For incoming call routing (Automated Call Routing). This will integrate with the SN Call Module.		Screen pop-ups of incoming calls	For BPSC	Alpha
SHC Service Now	Connector to SHC's instance of their Service Now.	New			Alpha
SSO	Single Sign-on Capabilities. We use WebAuth, Shibboleth, DUO, etc.	Existing	Can we use our technology? Yes.		Alpha
Incorta	New reporting solution that lives in the application. Used for reporting, metrics, dashboards.	New	We could consider using SN Performance Analytics instead of adding in our own solution. But Incorta would be used for pulling in data inside/outside of SN. We could use their ODBC driver connection to pull data into our BI. Not an integration. Need reporting requirements. SN will be turning on SN Performance Analytics for free and for a period of time during engagement so we can evaluate. We will need to add a Discovery on Reporting.	All	Pending
OBIEE	To be used instead of Incorta (or along side). Used for reporting, metrics, dashboards.	New	We will need to add a Discovery on Reporting. Once we implement Request and the Service Now Service Catalog, PMG can be decommissioned.	All	Pending

System	Purpose	Existing in Remedy or New in Service Now	Comments	User Population	Phase of project
Authority Manager	For approval routing info on changes that need to be approved for PRD migrations and incidents that require technical work (enhancements) below a critical priority. Authority Manager uses the financial authority model in support of approvals which is not supported in Remedy (What about the different authority model with respect to the hospital?)	New to Remedy / Existing for billable services			Phase 1.0
SMARTS / MAP / Event Manager	This is needed to create automated incidents from monitoring tools. SMARTS aggregates these incidents.	It is not automated in Remedy	SMARTS is being replaced by a custom tool developed by Anne Pinkowski's team. Tool = MAP (Monitor Aggregator Project) and should be ready by end-of-year. Not sure whether MAP will be integrated with Remedy for auto-ticket creation? Another tool under consideration would be ServiceNow's Event Manager. Requires an impact assessment. One potential timing issue/dependency is that SMARTS will be replaced. Not sure of the timing.	ITOC	Phase 1.0 (at the earliest)
Remedy	As a bridge solution until everyone is on Service Now and to facilitate tickets coming from non-migrated teams	New	Non-migrated teams. Need for integration goes away if we release the UIT instance in a big-bang, all Remedy users go to ServiceNow at the same time.		Phase 1.0
AS JIRA / JIRA On-Demand	For SDLC support	Existing	Will continue as a bridge solution until we implement SN SDLC. Will need to be made stronger per recommendations from UIT Improvement Team #4. As part of Incident Management Process Workshops, the team recommends that the integration to SDLC will come from Problem module not from Incident		Phase 1.0 /integration only
eAM (Oracle)	For work order creation of incoming requests	Existing		For billable services only	Phase 3.0

System	Purpose	Existing in Remedy or New in Service Now	Comments	User Population	Phase of project
iTAPP	ITAPP is a new tool to AS which allows us to manage multiple cloud provider and make them look alike to us and our clients. It's currently being used (maybe) for AS Virtual Desktop and is planned to be used for Amazon web servers, Azure, and others.	Existing	The SN Orchestration module would handle this.		Phase 3.0
OrderIT / PMG	Back-end is served up from PMG.	Existing	What kinds of OrderIT and billable services are tracked in Remedy? Is the integration two-way or only one-way, e.g. from Remedy to OrderIT to eAM to Oracle? Is any data fed back into an upstream system that could potentially impact Remedy / SN? ("reconciliation") This effort includes 1) moving current PMG internal form to Oracle APEX form and 2) changing current Oracle to PMG integration process by using Oracle SOA suite for integration and orchestration. This reflects using the recent acquisition of SOA suite technology in Oracle side. Also it will be much helpful for future version of Oracle with upgrade happening next year. SNOW-17, SNOW-18 for related info. Eventually **Not in Scope**, embodied in platform.		Phase 3.0

System	Purpose	Existing in Remedy or New in Service Now	Comments	User Population	Phase of project
SIPDB	SIPdb is a tool used as a central point for phone number and phone related data management, automated provisioning, and call reporting. It acts as an integration point between order processing and VOIP systems, and it also acts as a reporting source for a variety of telephony related information. This tool is developed in Python and integrates with OrderIT for the purpose of provisioning phone numbers on campus. This tool also integrates with the Voicemail Password Reset tool.	Existing		For billable services only	Phase 3.0
SLACK	CRC's Messaging App https://slack.com/	Going live July 19, 2015	Text messaging can occur. Ea. phone provider has an email address (name@att.com). Texts can go out via SMS. Requires more info. Will Chat act as a substitute. If so, then we can remove this.		Phase 3.0