



UC Health Managed Services Federated Process for Incidents, Requests & Changes

UCSF IT Service Management Office
<http://itsm.ucsf.edu>

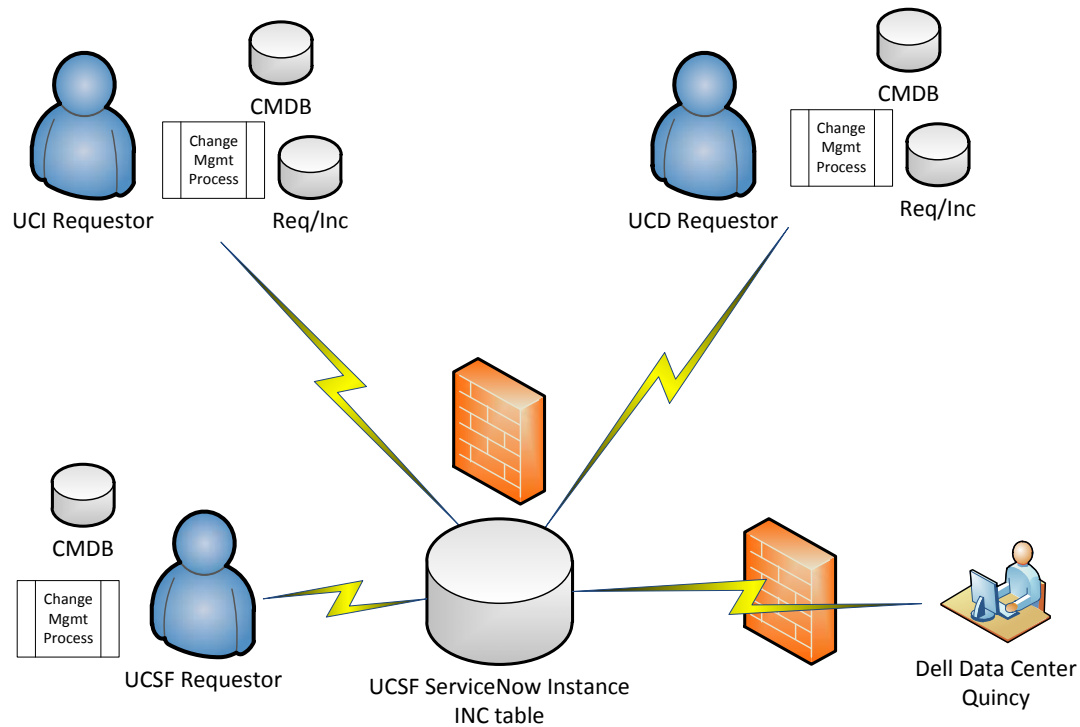
7/22/2016 / v1.4

UCSF Service Management Office

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UC Health Federated Model phase I



UC Health ITSM Federated Model for Managed Services – phase I

Key Components to All Dell Quincy Tickets

In order for the appropriate notifications, SLA and PagerDuty triggers to fire, tickets must be categorized accurately. These fields are all required:

Assignment Group = Dell Quincy Data Center

App/Business Service = Dell WTC Data Center Services

Configuration Item = Choose appropriate CI from Quincy Data Center CIs list

Symptom = MACD < 10 Devices or

MACD > 10 Devices or

Service Req Excluding MACD or

SmartHands Incident

Vendor Visit

Priority = 1 – Critical or

2 – High or

3 – Medium or

4 - Low

Quincy Data Center CI List

- All Quincy PODS, Network Cages, and shared Core Network routers are CIs tracked in UCSF's CMDB
- Tenants are tracked in the Stakeholders attribute of each CI
- The list can be found and updated here and must be maintained for accuracy:
<https://ucsf.box.com/s/jlqtk2ab0ifrlf4ysejj2vrasftpvumw>

CI Name	CI Class	Category	Managed By	Tenant	Notes
OCS24	Data Center Facility	POD	UCSF	UCSF, UCI	UCSF POD
OCS20	Data Center Facility	POD	UCSF	UCSF	Reserved UCSF POD
OCS18	Data Center Facility	POD	UCD	UCD	UCD POD
OCS22	Data Center Facility	POD	UCD	UCD	UCD POD
OCS26	Data Center Facility	POD	UCD	UCD	UCD POD
OCS28	Data Center Facility	POD	UCD	UCD	Reserved UCD POD
UC Network Cage A	Data Center Facility	Network Cage	UCSF	UCSF, UCI, UCD	Shared Network Cage
UC Network Cage B	Data Center Facility	Network Cage	UCSF	UCSF, UCI, UCD	Shared Network Cage
WTC-7K1-AC179-ADMIN	Network Gear	Router	UCSF	UCSF, UCI, UCD	Router installed in AC-179 (Core Network 7ks)
WTC-7K2-DO179-ADMIN	Network Gear	Router	UCSF	UCSF, UCI, UCD	Router installed in DO-179 (Core Network 7ks)

PagerDuty Routing Triggers:

Low and Medium priority tickets assigned to Dell Quincy Data Center will only trigger PagerDuty afterhours, weekends and holidays. High and Critical priority tickets assigned to Dell will trigger PagerDuty 24/7/365

▲ Name	Assignment Group	PagerDuty Service Name	Incident Type	Symptom	Priority	Schedule
Dell WTC - Crit E	Dell Quincy Data Center	Dell WTC	Event		1 - Critical	
Dell WTC - Crit I	Dell Quincy Data Center	Dell WTC	Interruption		1 - Critical	
Dell WTC - High E	Dell Quincy Data Center	Dell WTC	Event		2 - High	
Dell WTC - High I	Dell Quincy Data Center	Dell WTC	Interruption		2 - High	
Dell WTC - Low E	Dell Quincy Data Center	Dell WTC	Event		4 - Low	PD M-F 5p-8a - Sat-Sun 24hr - and holidays
Dell WTC - Low I	Dell Quincy Data Center	Dell WTC	Interruption		4 - Low	PD M-F 5p-8a - Sat-Sun 24hr - and holidays
Dell WTC - Med E	Dell Quincy Data Center	Dell WTC	Event		3 - Medium	PD M-F 5p-8a - Sat-Sun 24hr - and holidays
Dell WTC - Med I	Dell Quincy Data Center	Dell WTC	Interruption		3 - Medium	PD M-F 5p-8a - Sat-Sun 24hr - and holidays
Dell WTC Expedited MACD - Crit	Dell Quincy Data Center	Dell WTC MACD	Request	MACD < 10 Devices	1 - Critical	
Dell WTC Req - Crit	Dell Quincy Data Center	Dell WTC	Request		1 - Critical	
Dell WTC Req - High	Dell Quincy Data Center	Dell WTC	Request		2 - High	

Dell Data Center SLA Triggers and Targets:

Dell SLAs are triggered based on the Assignment Group (Dell Quincy Data Center), Priority and Symptom. There are two resolution SLAs for every ticket, based on the contract, with the target represented in the column labeled % below.

Contract	App/BS	Symptom	Priority	Incident Typ	Assignment Group	SLA	Target	%
N/A	Dell WTC Data Center Services	MACD > 10 Devices	Any	Project	Dell Quincy Data Center	None	None	N/A
1.1.2 Facilities Smart Hands Response Time	Dell WTC Data Center Services	All Service Request Symptoms	Any	Request	Dell Quincy Data Center	DDC - SmartHands Response - 6 HRS	6 hr response	Credit points p
1.1.3 Incident Resolution – Severity 1 Incidents	Dell WTC Data Center Services	SmartHands Incident	Critical	Interruption	Dell Quincy Data Center	DDC - P1 INC - 2 HRS	2 hr resolution	>= 90.0%
						DDC - P1 INC - 4 HRS	4 hr resolution	>= 97.0%
1.1.4 Incident Resolution – Severity 2 Incidents	Dell WTC Data Center Services	SmartHands Incident	High	Interruption	Dell Quincy Data Center	DDC - P2 INC - 4 HRS	4 hr resolution	>= 90.0%
						DDC - P2 INC - 8 HRS	8 hr resolution	>= 98.0%
1.1.5 Incident Resolution – Severity 3 Incidents	Dell WTC Data Center Services	SmartHands Incident	Med	Interruption	Dell Quincy Data Center	DDC - P3 INC - 8 HRS	8 hr resolution	>= 90.0%
						DDC - P3 INC - 24 HRS	24 hr resolution	>= 98.0%
1.1.6 Incident Resolution – Severity 4 Incidents	Dell WTC Data Center Services	SmartHands Incident	Low	Interruption	Dell Quincy Data Center	DDC - P4 INC - 72 HRS	3 day resolution	>= 90.0%
						DDC - P4 INC - 120 HRS	5 day resolution	>= 98.0%
1.1.7 Resolution Time – Priority 1 Service Requests (Excluding MACDs)	Dell WTC Data Center Services	Service Req Excluding MACD	Critical or High	Request	Dell Quincy Data Center	DDC - High Srv Req Excluding MACD- 2h 2 hr fulfillment	>= 90.0%	
						DDC - High Srv Req Excluding MACD- 4h 4 hr fulfillment	>= 98.0%	
1.1.8 Resolution Time – Priority 2 Service Requests (Excluding MACDs)	Dell WTC Data Center Services	Service Req Excluding MACD	Med	Request	Dell Quincy Data Center	DDC - Med Srv Req Excluding MACD- 48 2 day fulfillment	>= 90.0%	
						DDC - Med Srv Req Excluding MACD- 72 3 day fulfillment	>= 98.0%	
1.1.9 Resolution Time – Priority 3 Service Requests (Excluding MACDs)	Dell WTC Data Center Services	Service Req Excluding MACD	Low	Request	Dell Quincy Data Center	DDC - Low Srv Req Excluding MACD- 5d 5 day fulfillment	>= 90.0%	
						DDC - Low Srv Req Excluding MACD-10 10 day fulfillment	>= 98.0%	
1.1.10 Resolution Time – Expedited MACDs	Dell WTC Data Center Services	MACD < 10 Devices	Critical or High	Request	Dell Quincy Data Center	DDC - Expedited MACD Request - 24 HR 24 hr fulfillment	>= 90.0%	
1.1.11 Resolution Time – Standard MACDs	Dell WTC Data Center Services	MACD < 10 Devices	Med or Low	Request	Dell Quincy Data Center	DDC - Expedited MACD Request - 48 HR 2 day fulfillment	>= 98.0%	
						DDC - Standard MACD Request - 72 HRS 3 day fulfillment	>= 90.0%	
						DDC - Standard MACD Request - 96 HRS 4 day fulfillment	>= 98.0%	

Service Request vs. Project

Requires SmartHands:

A Move, Add, Change, Delete or “MACD” means the Colocation Services performed a Move, Add, Change or Decommission of a Service, Device (including associated attachments, features, accessories, software, firmware, Peripherals, and Cabling) or other item.

Service Request vs. Project

MACD < 10 Devices – SLAs apply

MACD > 10 Devices – Project , no SLAs

Use Case 1: UCHS Requests for new Data Center device install:

1. A request is opened & assigned to the Dell Quincy Data Center
 - a) App/Business Service = Dell WTC Data Center Services
 - b) Symptom = MACD < 10 Devices
 - c) Assignment Group = Dell Quincy Data Center
 - d) Configuration Item = Select the impacted Data Center CI
2. Dell's Response & Resolution SLA clocks begin
3. Dell acknowledges the request, stopping the Response clock
4. Dell assesses request and builds out equipment.
5. UC follows the Change Management process to schedule the equipment move into production. UCSF creates and completes the CMDB record
6. Dell moves the equipment into production at the scheduled time and resolves their request. UC closes out the Change after verifying work is complete.

Use Case 2: Something breaks - App "X" is unavailable:

1. A High or Critical INC is opened & assigned to a UC Application Support team
2. The Application team finds it cannot reach the server it resides on and reassigns to the Network team
3. The Network team finds no issue with the network but the server is not responding:

They create a related incident and assign it to Dell Quincy Data Center team

- a) App/Business Service = Dell WTC Data Center Services
 - b) Symptom = Service Request Excluding MACD
 - c) Configuration Item = Select the impacted Data Center CI
 - d) Assignment Group = Dell Quincy Data Center
 - e) Priority = Critical or High
4. Dell acknowledges the Incident, stopping the Response clock
 5. Dell determines the root cause and resolves the issue, resolves their INC, and stops the their Resolution SLA clock. Note: If the resolution requires an Emergency Change, UC is required to create that Change, regardless of who is doing the work.
 6. IT verifies resolution and resolves the Parent ticket

Dell Time Tracking, Tier 1 or Tier 2

All Dell's time worked on an incident or request must be entered in the Time Worked section of the Financial tab:

1. Double-click *Insert a new row...* to enter days, hours, minutes and/or seconds in the Time Worked column
2. Describe the work performed under the Comments column
3. Choose Dell Tier 1 or Dell Tier 2 under the Billing Type column
4. Enter the date the work was performed under the Actual Date Worked column

Time can be entered in as many intervals as needed and should only be entered for work directly related to the request or incident.

Billing will be generated based on these entries and accuracy is essential. The Tier 1 or Tier 2 designation will determine the billing rate per line item.

	Time worked	Comments	Billing Type	Actual Date Worked	Created	Created By
X	4 Hours	performed initial troubleshooting and de...	Dell Tier 2	2015-08-24	2015-08-24 13:39:05	Peter Stampfer
X	2 Hours	initiated emergency change process	Dell Tier 2	2015-08-14	2015-08-24 14:00:19	Peter Stampfer
X	3 Hours	completed Change Management process and ...	Dell Tier 2	2015-08-24	2015-08-26 14:16:55	Peter Stampfer
+	Insert a new row...					

Reports

Available Reports:

- **Dell Data Center tickets** – Complete list of Quincy tickets. Available in separate reports for each UC
- **Dell Data Center SLA Results** – Results by category, available in separate reports for each UC
- **Dell Data Center Breached SLAs** – Breached SLAs, available in separate reports for each UC
- **Monthly Dell Time Worked Billing** – Time worked as entered by Quincy technicians, , available in separate reports for each UC
- **Dell Vendor Visit Requests** – Complete list of Vendor Visit requests
- **Quincy Daily Change Report** – Daily report of active Changes

CMDB & Request for Change (RFC) Process

- Use Case 1: Dell initiated Changes that impact our Network Cages or PODs
 - Facilities, power, etc.
- Use Case 2: UCHS requesting Changes to Shared 7K Routers (or other shared equipment that may get installed)
- Use Case Other: UCHS requesting a Change to any 'non-shared' equipment in a 'shared' POD or Network Cage.

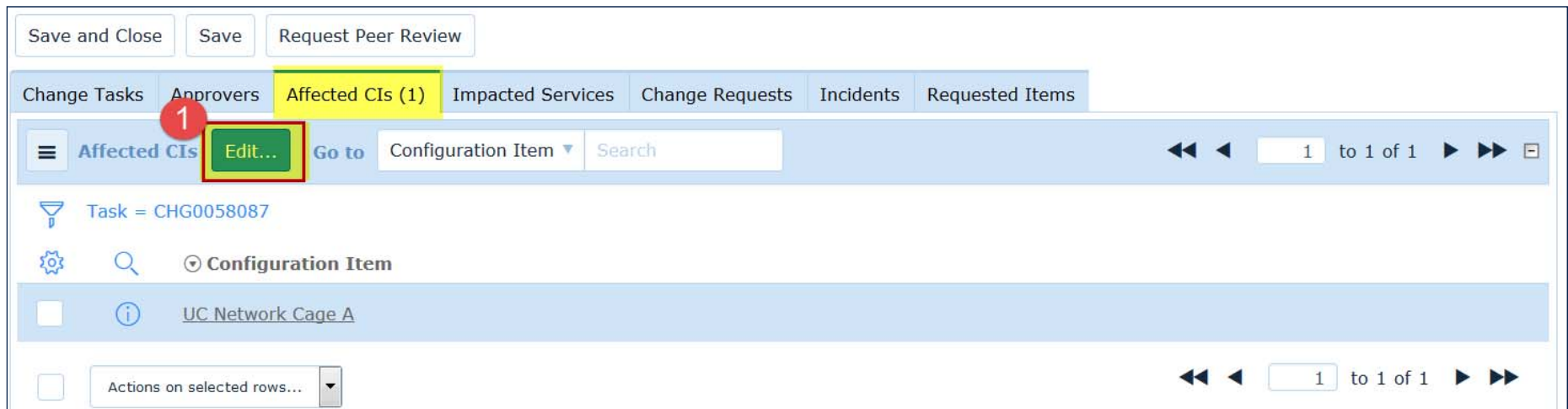
Change Management

Use Case 1 Process Steps:

Dell initiated Changes that impact our Network Cages or PODs

1. Dell creates a Request for Change (RFC) in UCSF's ServiceNow instance
2. Dell pulls in the affected POD(s) or Network Cage(s) Configuration Item (CIs) into the RFC
3. If multiple CIs, Dell enters first CI in the RFCs header CI field and others individually added to the Affected CIs TAB at bottom of RFC – see **FIGURES 1-3** below:

FIGURE 1:



Change Management

Use Case 1 Process Steps (con't) Dell initiated Changes that impact our Network Cages or PODs:

FIGURE 2:

Collection: ocs

Affected CIs List: CHG0058087

UC Network Cage A

Name: OCS24
Class: Data Center

FIGURE 3:

Change Tasks | Approvers | **Affected CIs (2)** | Impacted Services | Change Requests | Incidents | Requested Items

Affected CIs | Edit... | Go to: Configuration Item | Search

Task = CHG0058087

Configuration Item

UC Network Cage A

OCS24

Change Management

Use Case 1 Process Steps (con't):

Dell initiated Changes that impact our Network Cages or PODs

Continued...

4. Dell assigns a Peer Review task to another Dell SME for review
5. Once Peer Review is completed, Approval Requests will be sent to each affected Tenant (based on the CIs pulled into the RFC)
6. Once all Tenant(s) have approved*, an Approval Request is sent to the UCSF Manager (and IT Director, if applicable).
7. Once the UCSF Manager approves, the RFC is scheduled for review at UCSF CAB
8. Dell attends and presents the RFC at the scheduled UCSF CAB for approval.
9. After RFC scheduled by CAB, Dell completes & closes the change

* UCD and UCI do not login to UCSF ServiceNow to approve RFC. Their approvals are done via the approval link in email; all fields and attachments are included in the email. They are also sent a text message to alert them of approval request email sent.

Change Management

Use Case 1 Examples:

Example 1 - Dell initiated Changes for PDU related maintenance :

1. Dell creates a Request for Change (RFC) in UCSF's ServiceNow instance
2. Dell enters **PDU – Quincy** in Configuration Item (CI) field of the RFC

Example 2: Dell initiated Change impacting Network Cage A & OCS24 POD

1. Dell creates a Request for Change (RFC) in UCSF's ServiceNow instance
2. Dell enters following Network Cage in RFC header and POD in Affected CIs TAB:
 - **UC Network Cage A** and **OCS24** (see print screens below)

Header of RFC:

The screenshot shows the header of a Request for Change (RFC) form. The 'Configuration Item' field is highlighted with a red box and contains the text 'UC Network Cage A'. Other fields include 'Requires CI Update?' (No), 'Risk' (Moderate), 'Assignment Group' (Dell Quincy Data Center), and 'Assigned To' (Justin Wheeler).

Affected CIs TAB:

The screenshot shows the 'Affected CIs' tab in the ServiceNow interface. The 'Affected CIs (2)' header is highlighted with a red box. Below it, a list of Configuration Items is shown, with 'UC Network Cage A' and 'OCS24' highlighted by a red box.

Change Management

Use Case 2 Process Steps:

UCHS requesting a Change to Shared 7K Routers (or other shared equipment)

Shared 7K Router Changes (i.e., WTC-7K1-AC179-ADMIN & WTC-7K2-DO179-ADMIN):

- Lead-time REQUIRED to submit RFC for Shared 7K Router Changes = (2) Weeks
 - If creating a Request, the 2-wks lead-time starts from when request is created.
 - If not creating a Request, and only creating an RFC, the 2-wks lead-time starts after the Peer closes their task.

Continued on next slides.

Change Management

Use Case 2 Process Steps (con't):

UCHS requesting a Change to Shared 7K Routers (or other shared equipment)

1. UCHS creates a Request in their instance for UCSF Network Team: IT_Infra_Network_Data_Requests
2. UCSF Network Team reviews request and creates a related RFC
3. UCSF Network Team pulls in the CI(s) into the RFC.
4. If multiple CIs, UCSF Network Team enters first CI in the RFCs header CI field and others individually added to the Affected CIs TAB at bottom of RFC (see FIGURES 1-3 previous pages)
5. UCSF completes Peer Review
6. Once Peer Review is completed, Approval Requests will be sent to each Tenant (based on the CIs pulled into the RFC). Approvals can be monitored at bottom of RFC – see print screen:

Save and Close Save Back to Planning

Change Tasks (1) **Approvers (11)** **Group approvals (3)** Affected CIs (1) Impacted Services Change Requests Incidents Requested Items SDLC Release

Enhancement or Defects

Group approvals 1 to 3 of 3

	Approval State	Assignment Group	Approval user	Created
<input type="checkbox"/>	Approved	UCI Health	Dan Nead	2016-07-11 08:14:57
<input type="checkbox"/>	Requested	UCD Health		2016-07-11 08:14:57
<input type="checkbox"/>	Requested	UCSF Health		2016-07-11 08:14:57

Change Management

Use Case 2 Process Steps (con't):

UCHS requesting a Change to Shared 7K Routers (or other shared equipment)

7. Once all Tenant(s) have approved, an Approval Requests is sent to the UCSF Manager.
8. Once the UCSF Manager approves, the RFC is scheduled for review at UCSF CAB.

Once CAB approves:

9. At the Planned Implementation Start Date/Time of the RFC the Assigned To implements the change.
10. At the RFCs completion, the 'Assigned To' enters applicable work notes and closes the change.

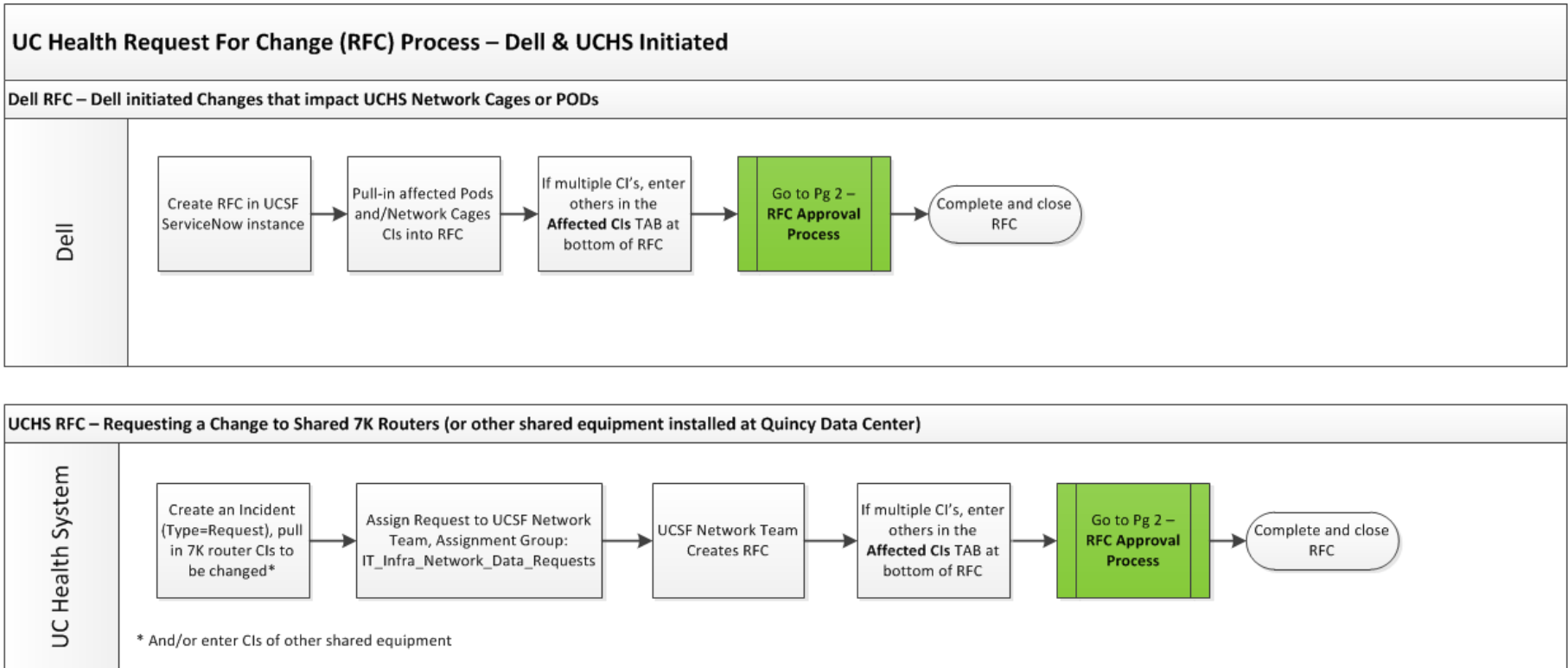
Change Management

Use Case 'Other':

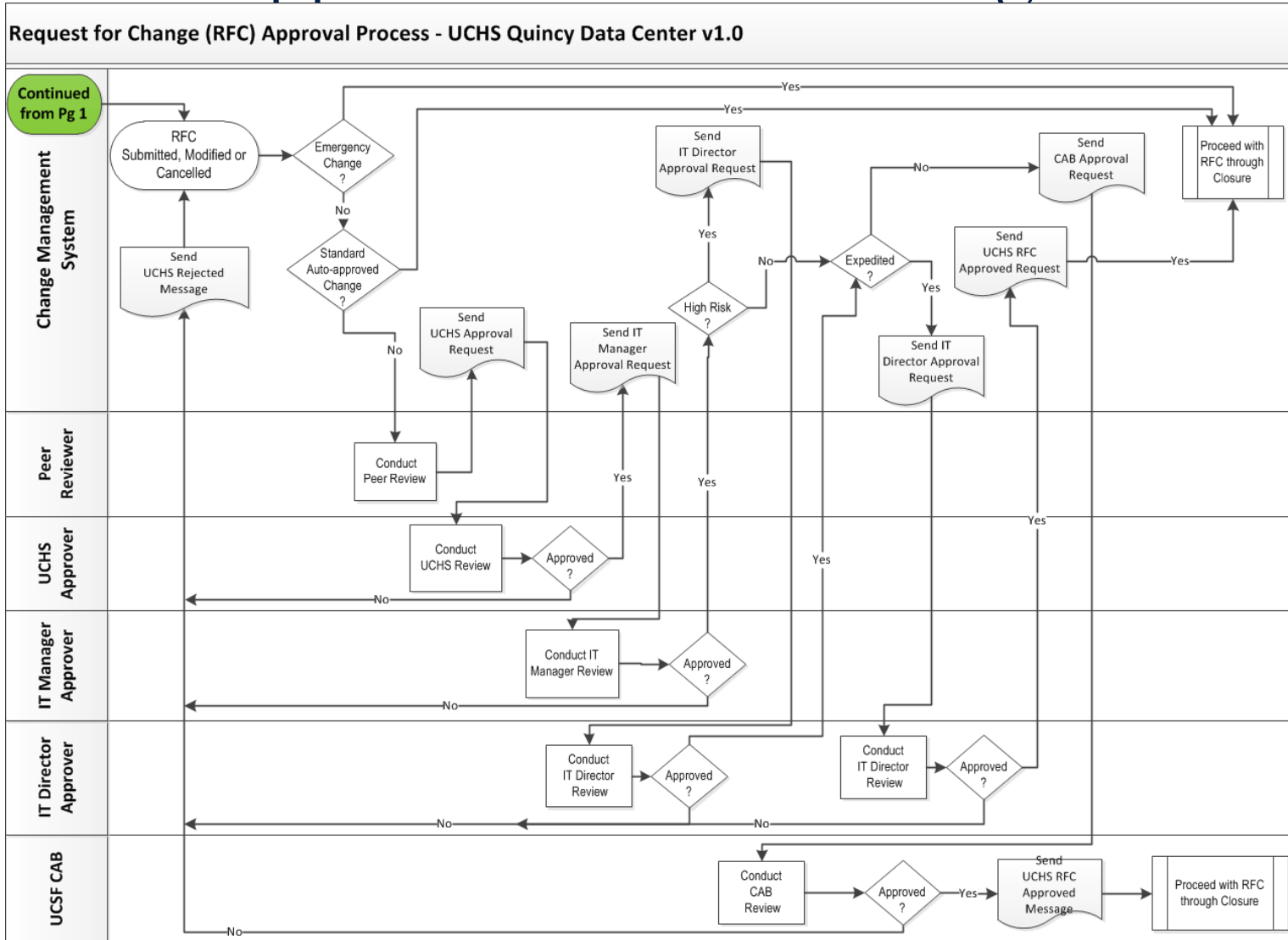
UCHS requesting a Change to any 'non-shared' equipment in a 'shared' POD or Network Cage.

1. When submitting a Change Request, follow the regular submittal process. No additional approvals are necessary.
2. For awareness, a Daily Digest of all Quincy Data Center Change Requests, will be emailed to all UCHS representatives.

RFC Approval Workflow – Page 1



RFC Approval Workflow – Page 2



UCSF Policy & Process Documentation

Change Management:

- <http://itsm.ucsf.edu/change-management>
- http://itsm.ucsf.edu/sites/itsm.ucsf.edu/files/enterprise_change_management.pdf

Incident Management:

- <http://itsm.ucsf.edu/incident-management>
- http://itsm.ucsf.edu/sites/itsm.ucsf.edu/files/enterprise_incident_mgmt_process-v1.4.pdf

UCSF Resources Contact Info

Change Management:

Lynn Bosworth, Process Manager: (w) 415-353-9233 (m) 415-307-5557

Email: lynn.bosworth@ucsf.edu

Incident and Request Management:

Peter Stampfer, Process Manager: (w) 415-353-9114 (m) 415-218-7715

Email: peter.stampfer@ucsf.edu

Data Center Phone #'s:

- UCD: 916-734-HELP (4357)
- UCI: 714-456-8750
- UCSF: 415-353-3591

UCSF

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