Project Charter

UCSF
University of California
San Francisco

General Information

Project Title		Date
Enterprise Service Management Reporting		7/3/2012

Project Manager	Phone	Email
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Executive Sponsor	Phone	Email
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1.0	7/32012

Project Scope

Situation / Problem / Opportunity

Current reporting functionality in ServiceNow is very limited, not user friendly and accessible only to ITIL users.

Project Goals

The Enterprise Service Management Reporting project intends to plan, design, construct and implement a structured data warehouse environment that will include data from ServiceNow. The data warehouse will support various areas of data from ServiceNow. The automated collection of data from ServiceNow will be available to create a wide range of reports and dashboards depending on the customer need.

The vision of the project is to improve efficiency and service levels of ITS services and support.

In Scope / Out of Scope

In Scope:
- Incident and Change related tables will be loaded into the data warehouse
- Predefined Incident Management reporting will be available
- Predefined Change Management reporting will be available
- Ad-hoc reporting for Incident and Change Management will be available

Out of Scope:
- Service Catalog tables will not be loaded into the data warehouse during this phase
- Service Request reporting will not be available during this phase

Objectives / Deliverables (if known)

- A data inventory that includes Incident and Change related tables.
- A data warehouse that can expand to include Service Catalog tables and other ServiceNow tables for future release(s).
- Cognos will be available to identified users to view and run reports.
- Provide Executives and Management with predefined reports for the following areas:
    - Productivity Metrics
    - Quality Metrics
    - Operational Metrics
    - Trending Metrics
- Provide ability for IT Managers to generate Ad-Hoc Reports.

Project Assumptions

- Preparation and development of the data warehouse will be completed by the Business Intelligence group.
- ServiceNow Developer will be made available for questions to the Business Intelligence group.
- Only IT Directors and Managers will have access to Cognos.

Risks and Dependencies

- Lack of resources or resource availability.
- Scope creep for additional 'predefined' reports.
- Select number of Managers to review and approve requirements.
- ServiceNow Subject Matter Expert (SME) is critical to Business Intelligence group.

Resource Requirements

- People:
    - Executive Sponsor
    - IT Directors
    - IT Managers
    - ITSM Product Manager
    - Project Manager
    - Business Intelligence Senior Manager
    - DW/ETL & Business Intelligence Developer
    - ServiceNow Developer
    - Business Analyst
    - ServiceNow Administrator

- Time:
    - The initial estimate for the Enterprise Service Management Reporting Project duration is approximately 6 months with an implementation occurring at the end of 2nd quarter for fiscal year 2013. (December 2012)
- Dollars:
    - The approved budget for the Enterprise Service Management Reporting Project is $50,000.
        - Actual Budget will be estimated after finalizing the requirements.
    - The license cost for Cognos is TBD based on the type (Consumer vs Adhoc) and number of users.

- Other:
    - The Cognos software will be available to identified users for viewing and running reports

High-Level Milestones and Timeline

- Project Charter Approved: July 9, 2012
- Kickoff Meeting: July 23, 2012
- Identify and Document High Level Requirements: July 31, 2012
- Finalize Requirements: August 17, 2012
- Design and Development Completed: TBD
- Unit Testing Completed: TBD
- UAT Completed: TBD
- Training Completed: TBD
- Go-Live: January 2013

Note: Dates and milestones are subject to change pending final requirements and resource availability.

Project Team Roles and Responsibilities		
Team Member	Roles	Responsibilities
Rebecca Nguyen	ITSM Product Manager	The Product Manager is the liaison to the Project Sponsor and Project Stakeholders, and is responsible for facilitating and organizing the project roadmap, managing the team work activities, and resolving issues raised by the Project Manager.
Jodi Muller	Project Manager	The Project Manager develops and maintains the project plan (resourcing, implementation, work plans, etc.), monitor project progress, and ensures projects are completed on time and within budget.
Stakeholders	IT Directors and Managers	The Stakeholders will work with the Product Manager in voicing concerns or issues impacting the success of the projects.
Ramesh Doraivelu (PD)	Senior Manager, Business Intelligence	The Business Intelligence Senior Manager oversees the Business Intelligence Developers, ensures optimal, accurate, and timely technical solutions to requirements and requests. In addition, is a technical liaison with other departments, coordinating information systems across the Enterprise.
Terrie Coleman	Business Analyst	Business Analysts analyze, interpret, and document business rules and requirements for technical systems. In addition, they assist in integration and user acceptance testing, support the development of training material, participate in the implementation of systems, and provide post-implementation support.
Jason Lin	ServiceNow Developer	The ServiceNow Developers will ensure technical quality of the systems and products, control system development and operation during implementation, provide input into the project plans for work completed status, produce all technical project deliverables, documentation and design specifications, and ensure technical issues are resolved.

George Meng and TBH	Programmer/Developer – Business Intelligence	The Business Intelligence Developers will ensure technical quality of the systems and products, control system development and operation during implementation, provide input into the project plans for work completed status, produce all technical project deliverables, documentation and design specifications, and ensure technical issues are resolved.
Shawn Hall	ServiceNow Administrator	Administrators maintain knowledge of how the system operates and are responsible for establishing processes and enforcing policies such as user access (accounts). In addition to monitoring and supporting the system, they contribute to user training, communication, troubleshooting, and enhancing the overall user experience.

Communication Strategy

What? Description/Title	Who? Provider	Who? Recipient	When? Frequency	How? Format	How? Medium/Distribution Method
Kickoff Meeting	Project Manager	Project Team	One Time Only	Meeting	Face to Face Conference Call
Project Team Meetings	Project Manager	Project Team, Invitees	Weekly	Meeting	Face to Face Conference Call
Meeting Minutes	Project Manager	Distribution List	2 days after Meeting by COB	MS Word file on Shared Drive	Email
Action Items	Project Team	Project Team	TBD	MS Excel file on Shared Drive	Face to Face Conference Call
Status Reports	Project Manager	Executive Sponsor	Bi-Weekly	PDF on Shared Drive	Email
Technical Design/Development Meetings	Project Manager Developers	Technical Staff	TBD	Meeting	Face to Face Conference Call
ServiceNow Updates/Announcements	Project Manager Product Manager	Project Sponsor IT Directors Project Team	As Needed	Email	Email

Charter will be reviewed and signed by the sponsors and manager

Executive Sponsor		ITSM Product Manager		Senior Manager, Business Intelligence	
Reviewed By	Date	Reviewed By	Date	Reviewed By	Date