**Vendor Z (Z) Technical Services Departmental Charter**

**Objectives**

The objectives of the Technical Services Group are two-fold; in the sense that we deliver two distinct types of services that require a particular focus and a particular structure. These two focal areas can be described as Managed Services & General Services (Implementation & Specialization). Whilst there are distinct focus areas there are also strong links between the two groups as they leverage the expertise of resources and demands of customers.

In addition to the above the Data Center and Operations group and the Internal support group also belong to this department.

**Functional Overview**

**Managed Services**

The primary function of this team is to provide appropriately skilled resources (specific technology accreditation and industry experience) and appropriately disciplined processes (“ITIL” type Processes) to be able to fulfill the contractual stipulations (eg: Service Level Agreements) for our Managed Services accounts.

* Generally these resources would be considered to be Level 2 and Level 3.
* The general nature of the work performed will often relate to an explicit Service Level (eg: performance management or capacity planning) and will always be applied in any of the following procedural processes; problem management, change management, configuration management, incident management, and release management.

**General Services (Implementation & Specialization)**

The primary function of this team is to provide specialized resources and generally skilled resources to target (presales) and fulfill (deliver) to the needs of our general sector customer base. Generally, the main services provided are presales activities and delivery activities by way of ad-hoc means i.e. time and materials activities or in a more formal project orientated means (Project request, FRP or RFT). In a very high percentage of the cases, this team will delivery services to the managed services customers where the work is considered to be above and beyond what is contained within associated contracts.

* Generally this team will maintain a highly specialized resource pool that directly compliments our technology vendor partnerships and alliances (eg: Citrix, Microsoft, Cisco)
* Provide presales support activities for the sales team and support the whole sales cycle.
* Be sufficiently resourced to deliver to the needs of known general customers who prefer Z as a technology partner when their needs are relate to ad-hoc, break-fix, or specialist consulting.

**Data Center**

The primary function of this group is to provide specific services to the Z managed services customer base were that relates to the housing and housekeeping of infrastructure equipment. The key focal areas of this team include:

* Provisioning of operational staff on a 24 x 7 x 365 basis
* The ongoing maintenance of client specific Information Manuals and Run-sheets
* Provisioning of physical data center space and associated environmental features such as Uninterruptible Power Supplies, early Fire Detection systems, Air-Conditioning, Physical Security, and so on.

**Internal Support**

The primary function of this team is to provide IT support services for the internal departments of Z to enable them to fulfill their functions and tasks by way of servicing and catering for their IT needs on an ongoing basis. The key focal areas of this include:

* Provide on-site resources and associated support services for staff located at xxxxxxx, xxxxxxxx and any other staff that may be located at a customer premise.
* Cater for internal user needs as they relate to desktops, printers, servers, backups, software, internet and mail.

**Operations**

**Managed Services Operations**

* The Managed services team will have dedicated Line Manager ownership and accountability across all outsourced accounts expect were the account is deemed to too large were a dedicated Line manager may be provisioned.
* Generally a technical lead or team leader will be nominated for a particular site or group resources with overall accountability and responsibility for technology QA, advice and risk mitigation.
* Each specific account will be costed and staffed with explicit resource capability to accommodate the technical requirements and fulfillment of the stated Service Level Agreements.
* Where the service is to be delivered centrally then a “one to many” principle is applied and costed (eg: append to current team and cost ½ a resource) as opposed to decentralized or “on-site” were generally a full FTE is costed and provided.
* Given the nature of the work being constant, ongoing, disciplined and repetitive; recruiting and resourcing will require alignment to these principles and generally relate to Level 2 and Level 3 competency.
* Resource overflow requirements will generally be required to cater for leave and training especially were resources are based on-site at customers.
* All technical personnel residing in the managed services area will be conditioned and trained on the disciplinary aspect of providing services via agreed Change, Problem and Configuration Management systems.
* All Managed services resources will be familiar with customer specific SLA’s.

**Procedures and Protocols and Interfaces**

* All managed services accounts will be bound by common Internal systems and associated procedures as they related to: Problem, Incident, Change and Configuration Management.
* Technical personnel will interface with Service Center, Operations, Service Delivery and Account Management staff as well as customer staff when undertaking daily functions.
* Each managed service accounts will have a technical and configuration detailed document current at all times.

**Tools**

* Service Level attainment can generally only be delivered in conjunction with an appropriate tool. Generally these tools are costed as part of the service upon engagement.
* Appropriately costed tools will have associated maintenance in place and will be kept current by technical staff. This is generally achieved during planned downtime windows.

**General Services (Implementation & Specialization)**

**Vendor Alignment / Partnerships**

* There are many vendor relationships and alliances that are current and that will continue to be developed and enhanced. These are considered critical when Z is assessed in terms of capability and credibility. The current partnerships that are both tactical and strategic are: Microsoft, IBM, Citrix, Cisco, SUN.
* Technical personnel will continue to be encouraged to maintain current accreditation and certification as this is mandatory to maintaining vendor partnership status.
* It is encouraged that senior Technical personnel will maintain a technical relationship with equivalent vendor peers. It is also understood that Sales is the primary owner of the overall relationship.

**Pre-Sales**

* Sales support activities will be provided to the Account Management and Sales Executive teams by way of technology specific knowledge to be applied in tender response and client engagement process.
* Current presales capability is in place for Microsoft, Citrix and Unix platforms in alliance with current vendors
* Capability statements are currently being developed and refined to assist the sales process.
* The nominated presales resources will adhere to defined Engagements processes and propose pre-defined implementation methodologies.

**Resource Specialization**

* This team will maintain a highly specialized resource pool that directly compliments our technology vendor partnerships and alliances (eg: Citrix, Microsoft, Cisco)
* Specialization is considered to be highest form of technical experience and accreditation and is allowed to discriminate on technology specific platforms. The Citrix and Microsoft technology is an example of this.
* Technology Specialist resources will be made available to act as 4th level escalation to both managed services and general resources in the process of problem determination.

**Procedures & Standards**

* All Scope of Works documents will adhere to one common document. All SOW‘s will require peer and Technical Management QA and subsequent signoff.
* All technical estimating will require an associated Work Breakdown Schedule and QA and signoff.
* Technical documentation will adhere to one common look and feel document and varied only by technology specific components.
* All technical projects will be bound by the published Implementation methodology.
* No project in general is to be scoped without any Project Management component.
* All T&M work undertaken for any customer shall require a Docket book to be signed upon completion of work.

**Data Center Operations**

* There are currently 4 teams comprised of 3 Operations staff and 1 Shift Leader per Shift.
* Each Shift runs a 12 hours shift thus covering 24 x 7 x 365. Whilst there is debate about 8 hr shifts and 12 hour shifts, this appears to be working at the moment.
* Recruiting for these resources requires tailoring to accommodate personnel with the correct balance of appropriate skill and a willingness to work shifts.
* Extended management focus is required to maintain the balance of job satisfaction and morale type issues that are often associated with shift work.
* An Operations specific induction process will be in place to ensure knowledge of hardware specific and customer specific processing is understood and adhered to.
* Ongoing training and familiarization sessions will be in place ensuring operational staff are in sync with hardware platforms and customer processing requirements. These would generally be conducted by Technical Services.

**Operational Procedures**

* Each customer in the data center will be bound by an Operations Information Manual and Run Sheet Manual. These manuals cater specific customer information that relates to processing requirements, escalation processes and customer / vendor information.
* A Disaster Recovery Manual will be in place to cater for the controlled recovery of customer environments in the event of an actual disaster.
* A Crisis Management Plan will be in place to deal with any type of crisis that is not a disaster in a controlled manner, stipulating effective restoration of data center environmental equipment, customer environment and appropriate communication.
* A Business Continuity Plan will be in place which will stipulate critical events required to enable the business to continue in some sort of fashion.
* A Security Policy Document will be in place which mandates the physical security requirements of the data center and access to it from both an internal and external perspective.
* The function and use of all tools within the data center will be documented and understood by all operations personnel.
* Automation will be considered as an ongoing process that will be driven by the Operations Analysts team in conjunction with an internal driver, or the Account Managers and customers as an external driver.

**Physical Data Center and Environmental**

* A monthly report will be produced highlighting capacity information of the physical data center as it relates to power, floor space, and air-conditioning.
* An Asset Register shall be maintained for all data center equipment.
* OH&S requirements for the data center will be documented and understood by all Shift Leaders and relevant managers
* Maintenance schedules shall be in place for all essential environmental features of data center. As a minimum the Vesda fire detection system, UPS’s, Air-conditioners, and Power Distribution boards will need to be in place.

**Internal Support**

**LAN’s, Desktops & Laptops**

* LAN’s, desktops & laptops are currently supported by Internal support staff.
* A register of all provided company assets (LAN, Desktops & Laptops) shall be maintained and kept current at all times.
* Only authorized and company provided software shall be loaded and supported on company assets.
* When customer related assets and or project related equipment is to be supported, it must be bound by an accompanying agreement / contract which clearly highlight ownership of assets and services to be provided.

**WAN’s**

* The Z IT department is currently providing Wide Area Networking support for all Z offices.

**Software**

* The Internal support team is responsible for License compliance and desktops and servers.
* A register of all provided company software and licensing shall be maintained and kept current at all times.
* Non supported software releases may not reside on servers and or other hardware attached to the network.

**Virus & SPAM protection**

* Maintain the Antivirus and Spam software for the external messaging servers
* All desktops and servers will run either Norton Antivirus or McAfee Antivirus
* The internal support team is responsible for ensuring that all servers and desktops and laptops are kept up to date with the latest updates files.

**Email & Internet**

* Manage the servers providing email & internet points of entry and exit.
* The internal support team will manage the local email servers.
* Responsible for Notes domain standards.
* Setting Internet access rules
* Internal Support owns and supports the following assets:
  + Local LAN’s
  + Local PABX
  + Local Messaging servers
  + Desktops, Servers, Laptops & Mobile phones
* All purchasing & maintenance remains the responsibility of Z in conjunction with internal support

Disaster Recovery & Business Continuity

* There is currently No disaster recovery plan or strategy or any form of business continuity that internal support maintains.

Change Management

* Internal Support shall maintain a register of changes and adhere to an equivalent Change Management process as resident in the Managed services team.