PRJ 00000 PM2 SDLC Validation Support Process and Help desk Readiness

**Support Process and Help Desk Readiness**

**<Project Name>**

***General Information***

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| --- | --- |
| Clarity Project #: | <PRJ-xxxx> |
| Project Name: | **<Project Name>** |
| Project Sponsor: | <Sponsor Name> |
| Project Manager: | <Project Manager Name> |
| Author: | <Author Name> |
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***Revision / Change History***

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| Revision Level | Revision Date | Revision Author | Description of Changes |
| 0.1 | <date> |  | Initial Version |
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*The purpose of this document is to define those processes associated with transitioning a project to the support organization, ensuring that system continuity is maintained. This document includes the identification of specific support groups and outlines the use of Service Management processes for the purpose of supporting this service.*

*The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values specific to the particular project.*

* Blue italicized text enclosed in square brackets (i.e., [text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.
* Blue text enclosed in angle brackets (i.e., <text>) indicates a field that should be replaced with information specific to the particular project.
* Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate.

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# Objective

*[State the overall objectives of the project followed by a high level overview of the support expectations, service levels, availability, and critical nature of the systems being turned over to support. Ensure that any global considerations are made in each of the areas below, including language, time zones, and location considerations.]*

# Support Overview

## Support Requirements

*[Define the specific requirements needed for the support teams to follow.]*

## Level One Support

*[Typically the (HP) Help Desk, define the first level of support that users of the system will be contacting and their responsibilities in supporting the system. Include areas that this level will not be responsible for as well.]*

## Level Two Support

*[Often the Application Support Team or equivalent, defines the second level of support that will be contacted when the first level is unable to resolve an issue. In some cases, Subject Matter Experts (SME) may be used. Describe their responsibilities in supporting the system. Include areas that this level will not be responsible for as well.]*

## Level Three Support

*[Often Centers of Excellence (COE), Infrastructure or Database Support Teams or equivalents, define the third level of support that will be contacted when the first two levels are unable to resolve an issue. Describe their responsibilities in supporting the system. Include areas that this level will not be responsible for as well. This level may also include vendor support when applicable and should be specified.]*

## Support Documentation and Training

*[Identify supporting documentation and training documents that can be used to aid in the support of the system.]*

# Roles and Responsibilities

*[This section defines the roles and responsibilities for supporting the service. Identify the groups that are to provide functional and/or technical support for the service. All key support contacts must be identified.]*

|  |  |
| --- | --- |
| **Support Group** | **Role** |
|  |  |
|  |  |
|  |  |
|  |  |

# Support Expectations

*[Identify here or reference other documents that outline the specific availability, service levels, and disaster recovery necessary to fully support the system.]*

## Availability

*[Identify application availability and scheduled down times available for maintenance and upgrades. This should include daily, weekly, monthly, and annual requirements as necessary.]*

## Service Level Agreement

*[Identify or reference separate documentation regarding the service level agreements with the support organizations. This should include level of support (record and route, early triage, etc.), response times, support times (24/7, working hours, etc).]*

# Help Desk Support Checklist

The checklist is intended to ensure that the Help Desk Support Procedures are complete and to determine the Help Desk’s state of preparedness to assume support responsibilities for new applications, systems, services, etc.

## Remedy definition

* Remedy menu choices established?
  + Terminology used is familiar to both Help Desk and customers?
  + Menu choices include majority of potential issues with application/system/service?
  + A MISC choice exists?
* Call scripting for menu choices added to Remedy?
  + Call scripts include requests for specific information related to each menu choice?
  + Call scripts are clear and concise?
  + Call scripts point out Knowledge Base entries for specific menu choice?
* Other Remedy dialogue boxes and pop-up messages established (as necessary)?
  + Dialogues and pop-ups are easily understood?
  + Information collected in dialogue pushes to appropriate field in Remedy?
* Remedy assignees established (including manager)?
  + Assignees are trained in Remedy? Assignees know –
    - Ticket priorities (and contact/closure responsibilities for each)?
    - How to accept tickets?
    - How to close tickets (with use of Resolution Codes and Solution Information)?
    - How to re-route tickets (with explanation)?
    - How to enter and assign tickets (when needed)?
    - Remedy emails are sent to customers?

## Support Structures

* Help Desk has had training/introduction?
  + To application/system (via formal project training)
  + To application support team
* Both Operations/Field Engineer teams have had training/introduction (as needed)?
* Help Desk has necessary system access?
* After hours/weekend support structure in place?
  + After hours support members defined
  + All necessary Remedy AFTER HOURS menu choices and support macros established?
* Additional required documentation and flowcharts provided?
* Subject Matter Expert(s) established (for knowledge contribution)?
* Support team prepared to contribute to Knowledge Base?
  + Application Support teams have taken part in Help Desk Knowledge Base training?
  + Preliminary knowledge has been contributed?

# Sign off and Approval

|  |  |  |  |
| --- | --- | --- | --- |
| Approver | Title | Signature | Date |
| Project Manager |  |  |  |
| Application Support |  |  |  |
| Help Desk |  |  |  |
| Others as needed… |  |  |  |