

IST Transition to Operations Plan

Service transition plans and support artifacts to account for during a project

At the beginning of a project, IST Transition to Operations Plan helps the Technical Lead and the Service Owner ensure resources have been allocated to execute required activities and to create or update required artifacts for successful service transition and project Go Live. Toward the end of the project prior to Go Live, the Service Owner of the service impacted by the project will be asked to validate that required activities for the service to be transitioned to operations have been completed, and the relevant service artifacts required for support in operation after Go Live exist and are up to date. This agreement is manifested by the Service Owner’s approval of the IST Transition to Operations Checklist found later in the project lifecycle. Use of this Transition to Operations Plan facilitates the successful approval of the IS&T Transition to Operations Checklist at the end of the project.

Each project will impact one or more services in a unique way. This document is to be used as a guide for discussion and to gain agreement between the Project Manager, Service Owner and Technical Lead to determine which activities and artifacts will be appropriate and required for the given project. The completed IST Transition to Operations Plan will be used to identify the transition tasks that need to be in the project schedule and help ensure that time is allocated to complete these tasks before Go-Live.

**Transition Planning**

Every project will impact a service in some manner. Planning and executing communication and training of the service support staff is critical to a smooth transition.

**Transition Training Plan**

Indicate how training required in preparation or Go Live will be accomplished.

|  |  |
| --- | --- |
| **Target Audiences** | **Describe Plan including target audiences, methodology & timeframe; note if N/A** |
| Clients | Client training should be addressed in the External Training and Communication Plan. |
| Service Desk and other Level 1 Support groups |  |
| Level 2, and Level 3 Support groups |  |
| Other IS&T groups |  |
| Other Groups (e.g. IT Partners, vendors) |  |

**Transition Communication Plan**

Indicate how communication required for Go Live to constituents will occur.

|  |  |
| --- | --- |
| **Target Audiences** | **Describe Plan including target audiences, methodology & timeframe; note if N/A** |
| Clients | Client communication should be addressed in the External Training and Communication Plan. |
| Service Desk and other Level 1 Support groups |  |
| Level 2, and Level 3 Support groups |  |
| Other IS&T groups |  |
| Other Groups (e.g. IT Partners, vendors) |  |

**Service Artifacts**

The documents listed below facilitate the organization’s ability to support services in operation. For more details about how and when these artifacts should be created, please refer to the Project Lifecycle/Transition to Operations Guide for Project Managers. Specific functional and business requirements as well as defined service delivery techniques will determine which of these documents will require creation or modification for any given project.

Indicate which artifacts will be prepared or updated to reflect changes triggered by this project:

Overall service information:

* IST Service Definition\* Yes/No
* IST Client Service Handbook\*\* Yes/No
* IST Service Component Handbook\*\* Yes/No
* IST Service-based SLA (Service Level Agreement)\* Yes/No
* Known Issues/Problems logged in ServiceNow Yes/No
* Service Disaster Recovery and Continuity Plan Yes/No
* ServiceNow CMDB Service Representation Yes/No
* ServiceNow Assignment Groups Yes/No
* Security and permissions for support staff configured Yes/No

End user information:

* TechWeb Online documentation: FAQs, How To’s, informational, etc. Yes/No

Tier 2/3 support team information:

* IST Run Book (including vendor information, monitoring, reporting)\*\* Yes/No
* IST SOP[s] (Standard Operating Procedures)\* Yes/No

Tier 1 support team information:

* IST Troubleshooting Guide\* (TS Guide published in ServiceNow) Yes/No
* ServiceNow Knowledge Base Articles besides the TS Guide Yes/No
* Other (please specify): Yes/No

**Footnotes**

\* Template available in IS&T Project Management Templates library in SharePoint (<https://share.bu.edu/sites/ist/ISTPMTemplates>).

\*\* Template available in IS&T Service Management Templates library in SharePoint (<https://share.bu.edu/sites/ist/ISTSMTemplates>).

**Service Documentation Harvesting**

At the conclusion of the project, artifacts to be published in SharePoint will be moved to the Shared Documents library in the Service Management site corresponding to the parent Client Service (e.g., “Email & Calendaring,” <https://share.bu.edu/sites/ist/service/com/email/docs>) and tagged to the appropriate Service Component (E.g., “Exchange”) and Content Type (e.g., “IST Service Component Handbook”). The Service Management site for any Client Service can be customized to fit specific needs, especially for larger quantities or special types of information - submit a ServiceNow ticket for SharePoint. While the IST Troubleshooting Guide should be created in the Word template, it should be submitted to IS&T's Communication & Documentation Group for publication in ServiceNow as a KB article. Shortly prior to Go Live and prior to the sign off of the IS&T Transition to Operations Checklist, the Service Owner will enter all known issues into ServiceNow prior to Go Live. A ServiceNow Knowledge base article will be created and be available to the support organization for Go Live.

**Sign-Off**

This document describes the required transition and Go Live activities and artifacts for the successful transition and operational support of the services impacted by this project.

Project Manager

Service Owner

Tier 1 Support Manager

Tier 2 Support Manager

Tier 3 Support Manager

If applicable, Client support/partner