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IT Service Management

ITSM - SOA



JANCO ASSOCIATES, INC.

2024



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IT Service Management and Service-Oriented Architecture



Definition

IT service management (ITSM) is a discipline for managing information technology (IT) systems, philosophically centered on the customer's perspective of IT's contribution to the business. ITSM stands in deliberate contrast to technology-centered approaches to IT management and business interaction.

Service-Orient Architecture (SOA) is an Information Technology and system architecture design approach built around computer services and components that are reused and recombined easily using a standard interface.

Service Request - Help Desk Priority Matrix & Process Flow Charts

Priority	Service Request - Help Desk Priority Matrix			
	P1	P2	P3	P4
Description	Multiple Users / No Workaround	Multiple Users Workaround Available; Single User / No Workaround; VIP	Single User / Workaround	Scheduled Requests
Acknowledgment	10 min.	30 min.	1 hr.	8 hrs.
Resolution	ASAP	4 hrs.	8 hrs.	per agreement
Assignment	15 min. Help Desk, assign to SWAT	15 min. Help Desk, assign to lead or analyst	15 min. Help Desk, assign to analyst	Help Desk
Missed Acknowledgement	Notify management with Hourly updates until acknowledgment received	Reminder Page	Reminder Page	Reminder Page
50% to Resolution Time	N/A	Notify management; Notify Lead; Metrics Report	Notify management; Notify Lead; Metrics Report	Notify management; Notify Lead; Metrics Report
Proactive Notification	Hourly Updates to Help Desk. Coordinator			Reminder email 8 hours before resolution
Missed Resolution	N/A	Auto-escalate to next support level; Metrics Report	Auto-escalate to Lead Metrics Report	Notify Management Metrics Report
Escalation Level	N/A	Escalate to SWAT or next level of management after missed resolution; 150% of Resolution time (6 hours); Metrics Report	Escalate to Lead after missed resolution; Escalate to Management after 150% of Resolution time (12 hours); Metrics Report	Metrics Report
Notification Level	Automatic or Manual Email to CIO within 30 minutes; Page IT Managers, IT Directors	Metrics Report	Metrics Report	Metrics Report

Change Control Quality Assurance Standard

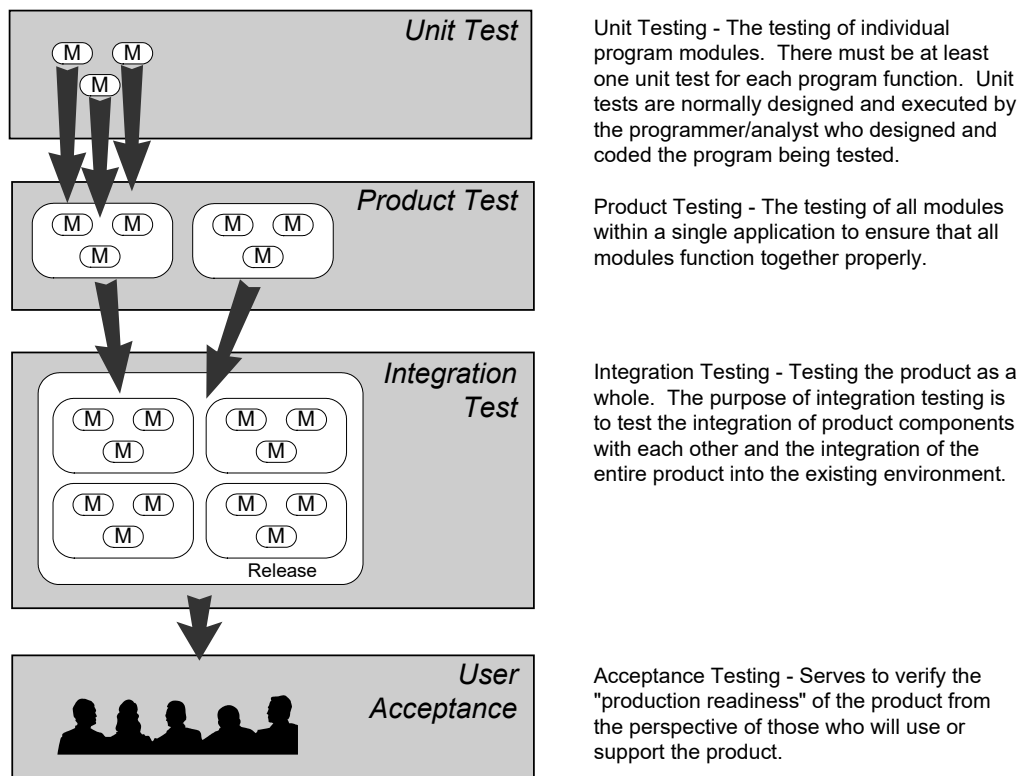
Overview

Quality is defined as the efficient and effective development, deployment, and support of defect-free products and services that meet or exceed, the needs of the clients, users, and business. All IT products and services must conform to the client, user, and business requirements to be considered quality offerings.

Standard

Testing

The end-user actively participates in application testing before user acceptance. Department personnel should specify the test criteria and evaluate test results.

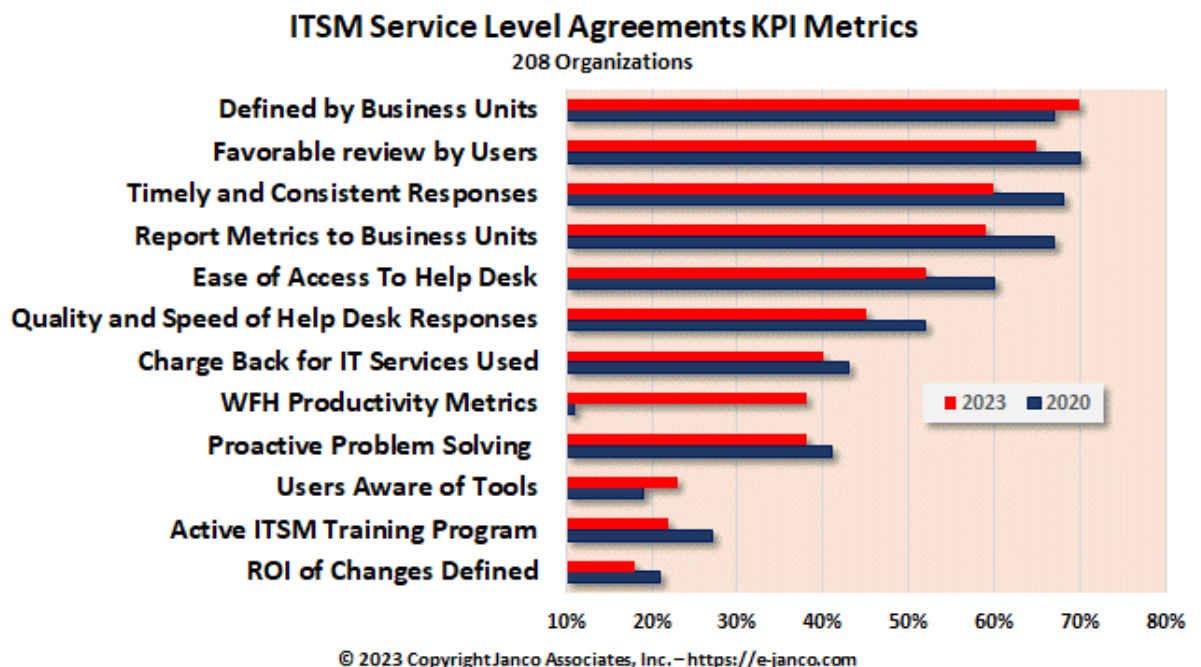


Service Level Agreement for [The Application]

Overview

The application is rapidly becoming one of the enterprise’s mission-critical applications. It is intended to run on a 7-day per week 24-hour per day basis and will be accessed from around the world. For IT to provide enterprise users with a realistic Service Level Agreement (SLA), IT must obtain SLAs from those internal entities that serve to maintain the application’s function.

IT’s overall SLA goal for the enterprise’s end user will be 99.0% service availability, not to exceed 100 minutes of unscheduled downtime per week. In addition to this, scheduled downtime should not exceed 4 hours per month. Scheduled downtime should be planned to coincide with what is typically the application’s least used period, bearing in mind that it is a global service that will be accessed by users in many time zones.



Job Descriptions

Vice President Strategy and Architecture

Chief Experience Officer

Director IT Infrastructure

Director Electronic Commerce

Manager Change Control

Manager Customer Service

Manager KPI Metrics

Manager Security and Workstations

Manager Service Level Reporting

Manager Training and Documentation

Manager User Support

Manager Vendor Management

Manager WFH Support

Change Control Analyst

Change Control Supervisor

Metrics Measurement Analyst

SEO Specialist

Policies

Blog and Personal Website

BYOD

*Internet, e-Mail, Social Networking, Mobile Devices,
Electronic Communications, and Record Retention*

Patch Management Version Control Policy

Sensitive Information

Travel, Electronic Meetings, and Off-Site Meetings

WFH and Telecommuting

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Acknowledgment*
Internet Access Request
Security Access Application
Sensitive Information Policy Compliance Agreement
Social Networking Policy Compliance Agreement
Telecommuting IT Checklist
Telecommuting Work Agreement
Text Messaging Sensitive Information Agreement

What's New

2024

- ✚ Added job descriptions
 - Manager Change Control
 - Manager Customer Service
 - Manager Security and Workstations
 - Manager Training and Documentation
 - Change Control Analyst
 - Change Control Supervisor
- ✚ Updated all included policies and electronic forms
- ✚ Updated all included job descriptions

2023

- ✚ Added Patch Management Version Control Policy
- ✚ Added job descriptions
 - Chief Experience Officer
 - Director IT Infrastructure
- ✚ Added section on steps to move on to SOA
- ✚ Updated all included policies and electronic forms
- ✚ Updated all included job descriptions

2022

- ✚ Updated all included policies and electronic forms
- ✚ Added section on Best Practices Help Desk Service Level Agreement
- ✚ Added materials for KPI and CSF metrics



Job Descriptions

ITSM - SOA



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Job Descriptions

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Manager Change Control

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Manager Service Level Reporting

Manager Training and Documentation

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Manager Vendor Management

Manager WFH Support

Change Control Analyst

Change Control Supervisor

Metrics Measurement Analyst

SEO Specialist

Vice President Strategy and Architecture

Position Purpose

The IT Strategy and Architecture function administers the preparation and reporting of the IT department's seasonal and long-range plans as well as providing long-term direction of the IT architecture. Based on overall enterprise plans, the director proposes the basic IT philosophies and directions related to planning and architecture for acquiring computer hardware and operating systems as well as application software systems. The individual synchronizes individual IT department plans with overall department plans, and department plans with division goals and objectives.

The Vice President is authorized to prescribe the frequency and formats for other IT departments' submission of data, including budgets in support of IT plans. The scope of this function extends from planning for the IT department's role in the enterprise to selecting specific hardware and software technologies for satisfying the enterprise's business objectives.

The overall scope of responsibility for this position includes:

- ▶ Planning that supports the enterprises' strategic business plan
- ▶ Architectural planning that takes into consideration all facets of the enterprise and technology including Advanced Technology: Artificial Intelligence; Data Architecture; and Decision Support
- ▶ Training requirements to support the plan and architecture
- ▶ Metrics definition, implementation, operation, and communications both within and outside of IT
- ▶ Definition and capture of metrics associated with the enterprise's Service Level Agreement Processes.
- ▶ Special projects such as mergers and acquisitions; and
- ▶ Imaging and other bank operational systems projects that impact the overall IT architecture.

Problems and Challenges

The incumbent is challenged with the task of providing comprehensive recommendations to the enterprise's senior management, both IT and non-IT. The director is further challenged with achieving a group consensus or decision that is consistent with the enterprise's goals and objectives. The individual holds a crucial role in determining the best direction for the enterprise IT function to follow, and keeping the enterprise heading successfully in that direction.



Forms

ITSM - SOA



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Electronic Forms and Questionnaires

Business and IT Impact Analysis Questionnaire
Blog Policy Compliance Agreement
BYOD Access and Use Agreement
Change Control Request
Email - Employee Acknowledgment
Internet Access Request
Internet & Electronic Communication - Employee Acknowledgment
Internet Access Request
Security Access Application
Sensitive Information Policy Compliance Agreement
Social Networking Policy Compliance Agreement
Telecommuting IT Checklist
Telecommuting Work Agreement
Text Messaging Sensitive Information Agreement



Threat and Vulnerability Assessment Physical and Electronic Sites - Page 1

Prepared by _____

Date

Location Type Company Residence Multi-Tenant Public Access

Address

Main Phone Facility Manager

Assets at facility Head count at Facility Primary Functions Performed

Power Grid Distribution Point

Telephone CO Location

Backup Power Yes No Length of Support Hrs

Safety Program Yes No Date of Last Review

DRP/BCP Yes No Date of Last Test

Internet Access Yes No Num of Access Points

Category I - Extreme Financial Impact Any Cat I in Facility Yes No

Category II - High Financial Impact Any Cat II in Facility Yes No

Category III - Medium Financial Impact Any Cat III in Facility Yes No

Category IV - Low Financial Impact Any Cat IV in Facility Yes No

Public Access Yes No Security Badges Yes No

Reception Desk Yes No Card Key Yes No

Guards Yes No Fenced Yes No

Armed Yes No Guard Gate Yes No

Guest Escorted Yes No Gate Manned Yes No

Cameras Yes No 24/7 Security Yes No

RT Monitoring Yes No After Hours Contact



Policies

ITSM - SOA



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Policies

Blog and Personal Website

BYOD

*Internet, e-Mail, Social Networking, Mobile Devices,
Electronic Communications, and Record Retention*

Patch Management Version Control Policy

Sensitive Information

Travel, Electronic Meetings, and Off-Site Meetings

WFH and Telecommuting



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BYOD Policy Template



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 Employee Termination Checklist

 Mobile Device Security Access and Use Agreement Form

 Mobile Device Security and Compliance Checklist

 Telecommuting IT Checklist

 Telecommuting Work Agreement

 Work From Home IT Checklist

 Work From Home Work Agreement

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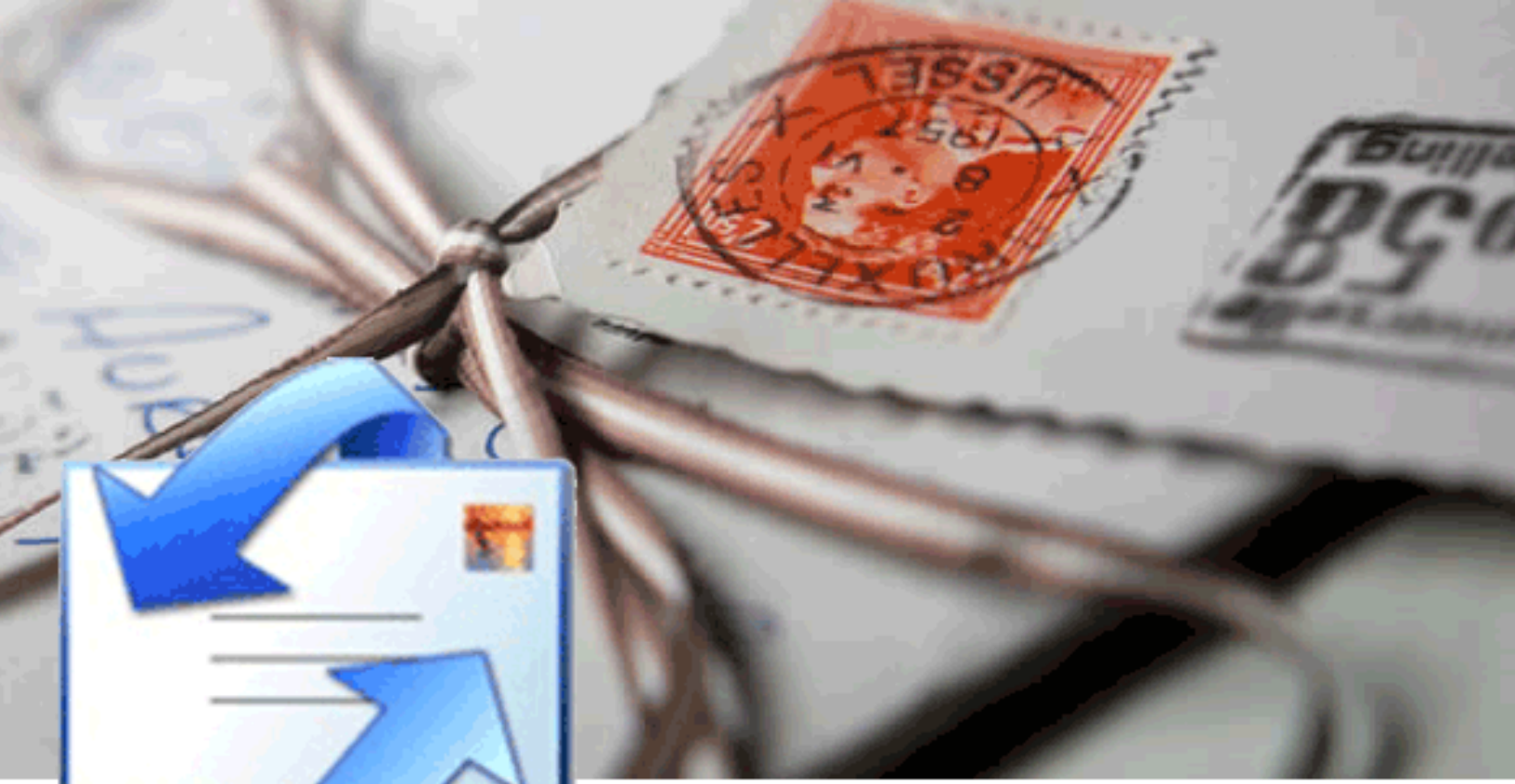
 BYOD Support Specialist

 BYOD Support Supervisor

 Manager BYOD Support

 Manager WFH Support

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Internet, Email, Social Networking, Mobile Device, and Electronic Communication Policy



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Sensitive Information



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Travel, Laptop, PDA, and Off-Site Meeting Policy

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