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Writing Samples

All company names, place names, and system names have been redacted and hyperlinks have been removed.

Release Notes

- 06.2018 Standardized Templates Release Note
- 08.2020 TechNotes

User Guide

- ServiceNow User Guide Version 1

Communications

- M&A email – Explaining next steps for migrating files, etc., to new users
- Cost Roll 2020 – Plan and communications for year-end activities

Proposals

- Content management proposal
- OCM Planning

RELEASE NOTES

Release Notes – June 15, 2018

Development Organization Templates Standardized

To make templates uniform and easy to find, several updated project artifact templates are now available on a new IT Team Site on SharePoint 365. These templates replace any you previously used for these project artifacts. Expect additional updated templates and a move to a more secure repository soon.

Organized by phase gate, the new IT Team Site currently contains the following updated templates:

- Architecture Plan
- Back Out Plan
- Code Review Signoff
- Cutover Plan – Go Live Schedule
- Cutover Plan
- Meeting Agenda & Notes
- Runbook
- Support Transition Plan
- Technical Specification Document
- Test Plan
- Unit Test Results

Standardized templates provide uniformity of formatting, content, and terminology across development initiatives, and the new IT Team Site provides a shared repository for accessing templates.

IT Team Site

Click here to access the new IT Team Site on SharePoint 365.

Using Templates

You can find the templates on the right side of the IT Team Site home page, listed by phase. To use the templates, click the ellipsis menu  to the right of the template name to open the dialog box, then click  and select **Download** to download a copy of the template to your computer. Microsoft may request that you log in before opening the files initially. All files will open as read-only, preventing users from making changes to the templates stored on SharePoint. Save a local version of the file to use as your project artifact.

Until directed otherwise, use this process for obtaining templates to ensure you are using the most up-to-date template versions.

Templates are populated with some instructions and examples; highlighted instructions direct you to replace, add, or remove information as necessary.

New items include work instructions for the Architecture Plan; a separate Cutover Plan-Go Live Schedule and Cutover Plan document; a Runbook template; and a template for Meeting Agenda & Notes.

The Cutover Plan-Go Live Schedule is an Excel spreadsheet that retains the same information previously found in the Cutover Plan: a tab for the **Go Live Schedule** and a tab for the **Contact List**. The new Cutover Plan template is a Word document that provides space for instructions, screenshots, post-release validation, and contingency plans.

This project was requested by [redacted].

August 2020 TechNotes

Contents

Wright Aware

Staying Vigilant Against Phishing Attempts

We must all stay vigilant against hackers, especially now when we are seeing an increase in phishing attempts. With so many of us working from home, hackers are taking advantage to use this as an opportunity to attempt to gain access.

You may think that your own information isn't important enough to tempt hackers, but the bigger concern is that just by gaining one person's account credentials, a hacker gets a foothold within our environment and can use that to get access to others' information and systems in order to wreak havoc.

Phishing attempts can appear to come from vendors we know, or even other Wright employees. Requests often include submitting a user ID and password, and may include requests for other sensitive data such as payment information or other confidential information.

Here is an example of a recent phishing attempt at [redacted]. Clues to what makes this suspicious include:

1. **Misspelled word in subject line**: "From" instead of "Form"
2. **Non-standard spelling used**: "Onedrive" instead of "OneDrive"

A few reminders for staying vigilant:

- **Think twice before clicking a link in an email**. Do you know the sender? Do you normally receive an email from this person for this purpose? Does the email address appear valid? Does the link URL look valid?
- **Don't give personal information.** No matter how official an email message looks, asking for personal information or credential information is a red flag. Going to an unfamiliar website that asks for personal information or credentials is even more suspicious.
- **Forward suspicious emails to [redacted].** If you receive an email that doesn't look right – has a suspicious domain name, poor spelling and grammar, a mismatched URL, or requests personal information – do not click any links, but do forward the email to [redacted].

This is an example of an email that [redacted] will send when your password is about to expire. It is the only communication you will see from [redacted] asking for your credentials. Anything else you should consider suspicious and forward to [redacted].

From : passwordadmin@[redacted].com

Subject : Attention!! Your [redacted] Network Account Password is Expiring!! ACTION NEEDED

Dear John, Your [redacted] network password will expire on 2020/08/07 11:50 AM. Please change your password as soon as possible to prevent interruption to your network access! This is the password you use with your network userid: john-123.

For systems and applications used by this account and password, see the link below. For instructions on how and where you can change your password, click the following link to access the how-to document.

https://[redacted]apps.sharepoint.com/:b:/g/IT/supportservices/EdoxbNIkLptPkJWf8hI70kYBk-GkGohqg537mE5e8ShMqA?e=OEn7kW

Thank you.
Regards [redacted] TechForce
techforce@[redacted].com

IT Updates

CIO Blog

Hello all! I took some time off from the CIO Blog given the frequency of global announcements over the last few months but thought it was a good time to connect once again. I hope this post finds you and your loved ones safe and well.

A lot has happened since my last blog post!!! IT continues to focus on continuous improvements this year in a number of exciting ways. We formally launched Total Quality Management (TQM) within IT to help us target our weaknesses and apply a structured methodology to both address the weakness as well as institutionalize the improvement into our go-forward processes. As a result, we recently completed our first TQM theme in partnership with [redacted] who provides a number of critical IT services, where we have reduced our average IT Support Ticket aging (time from creation to closure) to provide better service to you all as you have issues with your technology. We see TQM as a strategic lever for continuing to unlock value for the organization. We have also launched our [redacted] process in order to better address small improvement opportunities identified across the organization. We first focused on improvements in our [redacted] platform across [redacted] where we are seeing very meaningful results. We have recently extended [redacted] to other areas of [redacted] as well as data improvements for analytics and reporting. [redacted] is another strategic lever for us to increase our value proposition back to the company and we thank you all for the great cross-functional partnership we have had so far.

Also, IT has created an IT integration program team structure in support of pre-close integration planning across the various aspects of our company. If you have a technology planning need regarding integration and have not had someone from IT contact you already, please reach out to me or [redacted] and we will connect you with the right IT Leader.

Finally, if you would like to leave us a compliment, suggestion or complaint about IT please respond to this email to do so. Your feedback is important!

Thanks, and have a safe and enjoyable rest of your summer!

TQM Update

We've been rolling out total quality management tools (TQM) within IT to continue to improve our service levels. TQM focuses on areas for improvement through a system of practices, tools, and training methods. For the past few months our TQM Champions have been training teams with active walk-throughs of the TQM process.

We have identified and are working through seven TQM themes, or areas for improvement, across IT to address process refinements. Our first exercise is to reduce the time involved in completing end user requests of the Help Desk. After a detailed analysis of how an end user request is entered, worked, and completed, the cross functional team identified solutions. Going forward, our support teams will be undergoing training on follow-up procedures and will implement dashboards and follow-up queue alerts to ensure progress against stalled tickets. How can you help? When TechForce calls you to request input or for additional information, be sure to provide them with the information needed in a timely manner.

Other TQM conversations underway include:

- **Support**: Understanding Sales Force needs for support via phone vs self service to reduce the need for time-consuming phone calls, as well as decreasing the volume of [redacted] tickets and Outlook email-related tickets.
- **Project Delivery**: Reducing the number of project change requests and the number of defects delivered as part of a project.
- **Internal IT**: Improving the vendor management process.

TechPortal Updates

Employee Self Health Report User Guide

The Employee Self Health Report monitors wellness, enabling a quick respond to any significant trends among employees within facilities. You can fill it out in under 30 seconds to help support team members working in facilities. Your responses are only visible to your manager and designated HR business partners.

Click here for the user guide. Visit the TechPortal home page and click Employee Self Health Report to update your health status.

New Self-Help Knowledge Base items include:

- Return to Office (RTO) group calendar instructions: The RTO group calendar is how we are now requesting office access for mission critical meetings and functional work. For those of you who continue to work from home, you must use the RTO Group group calendar before returning to an office or facility for events and tasks that are critical to customer support and company sustainability. Make sure to plan ahead to ensure your RTO is approved prior to your event. RTO requests are not required for dropping in alone for a brief time for tasks such as picking up mail.
- [redacted] Quick Start Guide: Use [redacted] to share files securely. Files are sent as secure links rather than as attachments.

Three top-rated articles this month:

- Using the Return to Office Group Calendar
- Employee Self Health Report Guide
- What to Expect – Migrating Outlook Mailboxes to Office 365

USER GUIDE

[redacted] TECHFORCE
service • support •
solutions • satisfaction

ServiceNow User Guide

Table of Contents

Introduction

ServiceNow is now a [redacted]-owned, updated version of ServiceNow software. This user guide focuses on the applications and process used by TechForce.

TechForce includes the service desks in [redacted], [redacted] and [redacted], and TechBars for walk-up service at [redacted], [redacted], [redacted], and [redacted], offering global support 24 hours a day, Monday through Friday, and 8:00 AM to 5:00 PM CDT/CST on weekends. TechForce works together as ONE team.

Overall Navigation

The overall navigation of ServiceNow includes the structure of the user interface and options for customization.

Structure

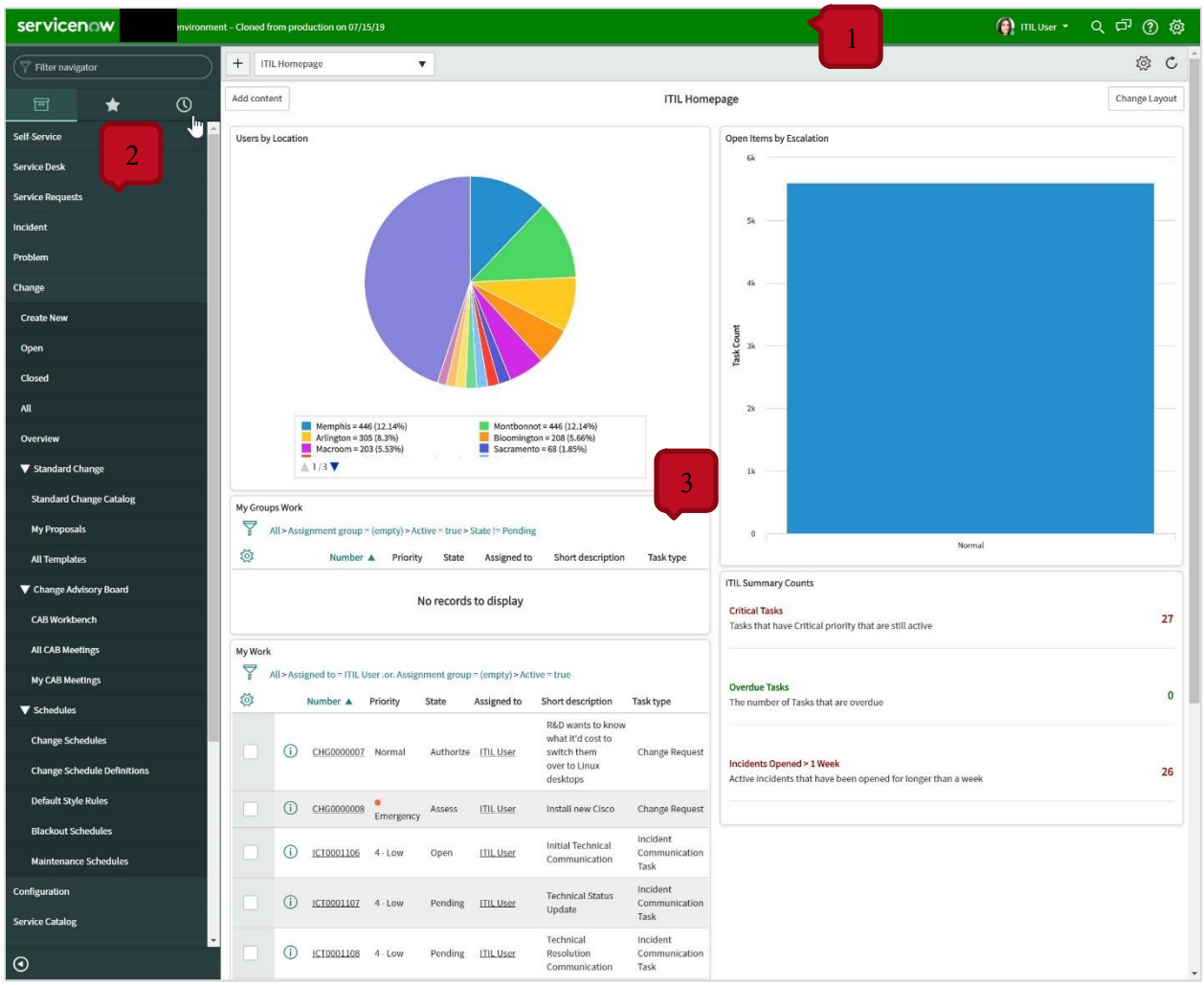


Figure 1 - ServiceNow Homepage

The Homepage appears when you first log in. Homepage views vary depending on your role in the system. You can add elements and change the look of to your homepage by clicking **Add content** or **Change Layout**. You can return to the Homepage from any page by clicking the TechForce logo.

1. Banner Frame – Runs across the top of every page.

Figure 2 - Banner frame

- User menu – View your profile or log out.
- Global search – Click the Search icon. Search by key words or record number.
- Connect – Toggle the Connect sidebar to chat.
- Help – Toggle the Help sidebar to find Help articles.
- System settings – Edit personal settings.

2. Left menu
    - Filter navigator – For quick access.
    - All applications – View all applications and modules. Click an application for more options. Double-click **All applications** icon to close all menu items.
    - Favorites – View or customize favorite items. Click the edit icon to personalize favorites.
    - Your history – View recently accessed items.
3. Content area – Displays the page you have selected.
    - Welcome page – Appears when user is not logged in.
    - Homepage – Provides easy access to commonly used functions or information.

Widgets, Lists, and Forms

Pages in ServiceNow are made up of widgets, lists, or forms.

Widgets

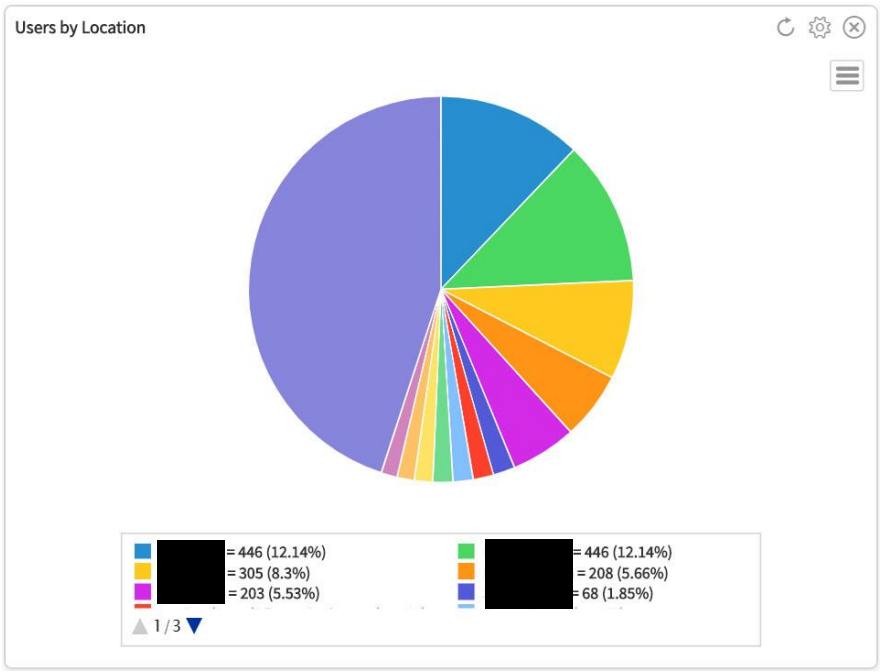


Figure 3 – Widget Example

Widgets, or dashboards, enable you to view information relevant to your role. Click **Add content** to add widgets. Hover over a widget to view the following options:

- **Refresh Widget**
- **Edit Widget Preferences**
- **Close**
- **Chart Context Menu**

You can click a section of a widget, such as the area above representing Memphis users, to display the information in list form.

Widgets can be found on your homepage and any Overview pages.

Lists

A list displays a set of records from a data table. You can filter and customize lists to display the information you need.

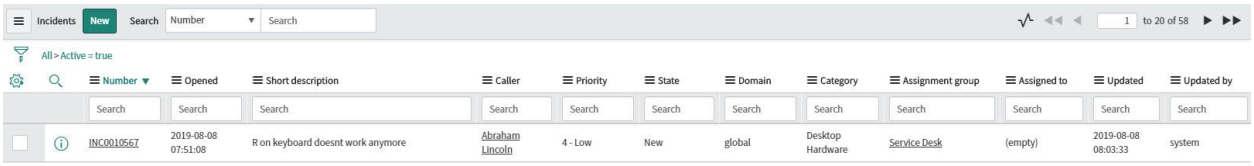


Figure 4 – List Example

- Drop-down menu – Lists options for **View**, **Filters**, etc.
- Title – Displays the list title.
- **New** – Click to create a new record
- **Search** – Search records for text or based on column options.
- Activity Stream – Displays recent activity records.
- **Show/hide filter** – Click to show List Query Builder. Select field, operator, value for your query.

Figure 5 - List Query Builder

- Personalize list gear icon – Click to customize the list.
- Search icon – Click to search by column.
- Columns – Click on a column to sort by that column heading.
- Item menu – Right click on any item to show a menu of additional view options.

Forms

Some ServiceNow pages contain a form displaying information for one record in a data table, or contain an empty form to create a new record.

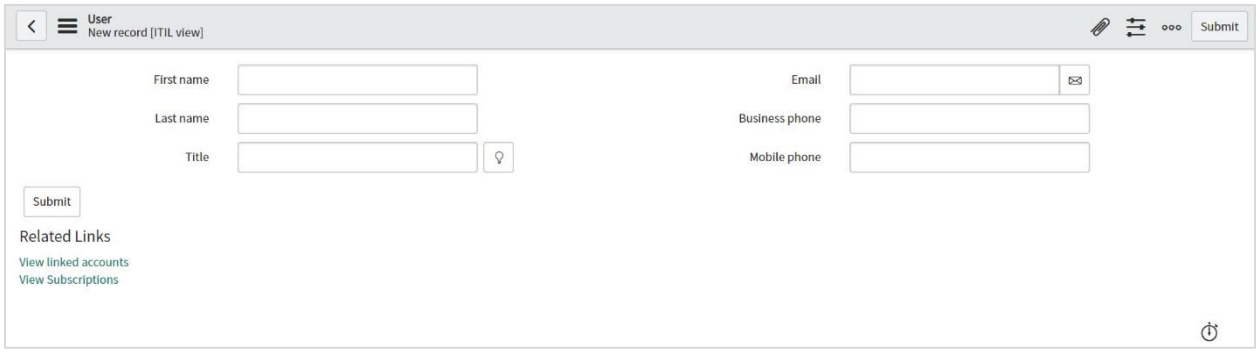


Figure 6 – Form Example

- Form header – Displays the type of form. Right click the form header to display an additional menu, which varies based on the form selected.
- Field – Stores specific data.
- Sections – May contain information grouped into sections that can be collapsed or viewed.
- **Submit** – Click to submit when creating a new record.
- **Related Links** – Additional links related to the current record.
- **Related Lists** – Additional records related to the current record.
- Tabs – Tabs are displayed on the bottom of forms and vary depending on the type of form.

Definitions

- Call – User contact prior to categorization as an Incident, problem, change, or service catalog request.
- Caller / User – Individual experience service interruption. They report the interruption, and may be consulted during diagnosis. They are informed during lifecycle of the Incident.
- Category / Sub Category are dependent Fields, so their selections are dependent on another field's selections, i.e., Subcategory options change based on Category selection.
- Change Request – A request to start the Change Management process to have one or more Configuration Items added, changed, or deleted.
- Configuration Item (CI) – Any service component, infrastructure element, or other item that needs to be managed in order to ensure the successful delivery of services.
- Incident – An unplanned interruption to a service or reduction in the quality of a service.
- Known errors – A problem that has a documented root cause.
- Level 1 support – "The Service Desk." Single point of contact for the customer. Performs the triage process.
- Level 2 support – Responsible for diagnosis, resolution, and escalation of level 2 or higher Incidents.
- Major Incidents – Highest priority (most severe) Incidents that results in significant disruption to the business or customer and requiring response beyond routine Incident management.
- Major Incident Manager – Individual responsible for documenting, coordinating & managing activities of a Major Incident.

- Major Incident Team – Responsible for resolving a Major Incident. This team may include IT SMEs, Service Desk Analyst, SR. IT Leadership, and Key Stakeholders.
- Normal service operation – operation within Service Level Agreement (SLA) limits.
- OLAs (Operational Level Agreements) – Agreements within TechForce, e.g., 10-minute accept/reject rule.
- Prioritization – an Incident's priority is determined by assessing its impact and its urgency.
- Problem – The unknown cause of one or more potential or recurring Incidents.
- Process Manager – Manages process day to day activities, resolves process disputes, and escalates Incidents as needed.
- Process Owner – Accountable for the overall process.
- Service catalog request – A formal request from a user for something to be provided (Service or Item).
- Service Desk Analyst – Responsible for level 1 support, including initial logging, diagnosis, resolution (if possible), and escalation.
- Service Requests – Service requests are enhancements and ideas, including SPARK ideas, that users submit for consideration.
- SLAs (Service Level Agreements) – An agreement between the business and IT about the expected delivery of services.
- TechForce – Service Desk
  Functional unit with dedicated staff responsible for a variety of ITSM user-facing activities:
  - Single Point of Contact (SPOC) for all users on a day-to-day basis
  - Communication point for operational issues
  - Coordination point for multiple ITSM processes
  - Handle Incidents, Service Requests, general questions, potentially some Changes
- Ticket – Any request from a user via the TechPortal that then is available in ServiceNow in the forms of an Incident, Call, Service Request, Problem, etc.
- Ticket Logging – the act of logging an interaction with a customer (either by an IT service fulfiller or result of a triggered, integrated event).
- User / Caller – Individual experience service interruption. They report the interruption, and may be consulted during diagnosis. They are informed during lifecycle of the Incident.
- VIPs – This group of users is comprised of executives and their administrative assistants; incidents reported by or on behalf of VIPs are assigned a higher priority.
- Workaround – A temporary solution to bypass an Incident or a Problem.

Incident and Request Management

The following information is available in ServiceNow for Incident and Request Management. Click any item to see more detailed information.

- Ticket Management
- Service Desk Menu
- Service Requests Menu

- Incident Menu
- Problem Menu

Ticket Management

TechForce

The Service Desk (SD) is now TechForce, offering global support 24 hours a day, Monday through Friday, and 8:00 AM to 5:00 PM CDT/CST on weekends. TechForce works together as ONE team. When we talk about TechForce (or the Service Desk), we mean all three Service Desks. Hours for each SD is as follows:

Tickets

Tickets are what we refer to as any request from a user via the TechPortal, phone, email, or walk-up at a TechBar. It could be a Service Request, an Incident, a Catalog Item, or an Enhancement Idea.

Tickets are owned by the Service Desk and the Service Desk only. The SD is responsible for on-time delivery within SLAs and escalation if SLAs are not met. This means that the Service Desk monitors ALL tickets, and contacts Level 2 support groups for status updates when tickets are not updated correctly.

The Service Desk has a list of five questions/details (See the Technical Knowledge Base for more information) to be asked before escalating a ticket to Level 2 support and will always provide the information stated in these questions before sending the ticket, to ensure quality of tickets at Level 2.

Single Point of Contact

TechForce is enforcing the single point of contact principle – all ticket-related communications will go through the Service Desk. If Level 2 needs more information from a user, they will contact the Service Desk to get the information or, if needed, jointly contact the user. This ensures a consistent way of communicating with the end user, as well as educating the SD on the information that they need to ask from a user.

When contacted by phone, the Service Desk will try to be quick and concise in their conversation, acquiring the correct data from the user, and not keeping the user on the phone longer than necessary. Also, never keep the user on the phone for more than 10 minutes. If the incident is not fixed after this period, let the user go, keep doing research, but do not keep the user on the phone.

Time Management

Level 2 support groups have to accept or reject tickets within 10 minutes of receipt. This means that every group must assign someone to monitor the input of tickets.

The person in charge of accepting or rejecting tickets should do a time estimation to see if the expected resolution time is past the (prefilled) SLA time.

Updating Ticket Information

Tickets must be updated regularly. The moment a technician starts working on the ticket, they will make a comment in the notes. When the technician stops/pauses work on the ticket, they will make a note again. This ensures updated information and prevents the Service Desk from having to call Level 2 to get updated information.

Knowledge Base

Service Desk and Level 2 must always check the Knowledge database for existing solutions or workarounds

When resolving a ticket, the SD must check if there's a Knowledge article, and if there is not, suggest having one written through the Knowledge process.

Incident Management Process

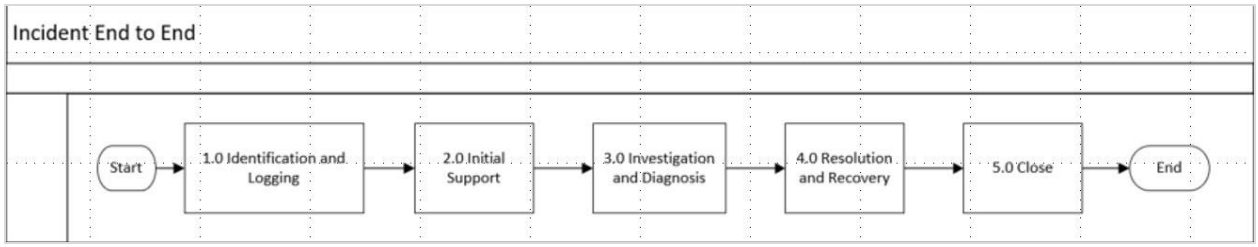


Figure 7 - Incident Management Process

Incident: Accept or Reject

When an Incident is assigned to a group the following occurs:

1. Notification is sent to the Assignment Group.
2. The OLA count begins.
3. If the Incident is accepted, the OLA count stops.
4. If the Incident is not accepted within 10 minutes, the Incident will appear in the **Incidents called Over 10 minutes** queue.
5. If the Incident is Rejected, it is reassigned to the Service Desk and appears in the **Open Incident** queue to be reassigned to a different Assignment Group.

Ticket Escalation

When the Service Desk is not able to find a solution, either by talking to the user, or by accessing the Knowledge Base, they will escalate the ticket to the next level support. In order to determine the group the ticket needs to be escalated to, refer to the escalation table in this article. (INCLUDE LINK TO THE ESCALATION KNOWLEDGE ARTICLE).

Ticket Resolution

When resolving a ticket, the mandatory **Resolution notes** field should be filled out with a proper description of the resolution, rather than something generic like “fixed.”

A note should be made in the ticket, when resolving, that it should be a Knowledge article, if the Incident is believed to be generic and can be expected to happen again.

The definition we are using for “resolve a ticket” is that the SD believes to have fixed the Incident, and the user should be able to work again.

Ticket Closure

Closure of a ticket is done automatically after 10 days, or when the Service Desk has contacted the user and received confirmation that the issue was resolved.

When the Service Desk closes a ticket, they must check that the ticket has been filled out completely, and that all fields are correctly filled out (category, priority etc.) this for accurate reporting.

Service Desk Menu

The following options are available under the Service Desk application in the left menu. Click an item to see the description.

- Callers
- Incidents
- Incidents called Over 10 Minutes
- Knowledge
- My Work
- My Groups Work
- My Approvals
- SLAs Menu
- Calls Menu

Callers

All callers are displayed in list format. Click a row to view the entry.

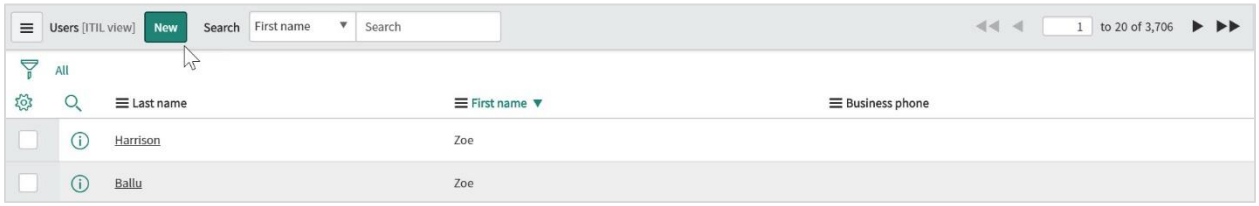


Figure 8 – Service Desk Menu, Callers List

Click a row to view the entry.

Incidents

All Incidents are displayed in list format. Incidents are any unplanned interruption to a service or reduction in the quality of a service. Incidents can be submitted by users by phone, walk-up, email, and from the TechPortal, and include submissions from the **Ask a Question** section.

See more information about Incidents in the Incident Menu.

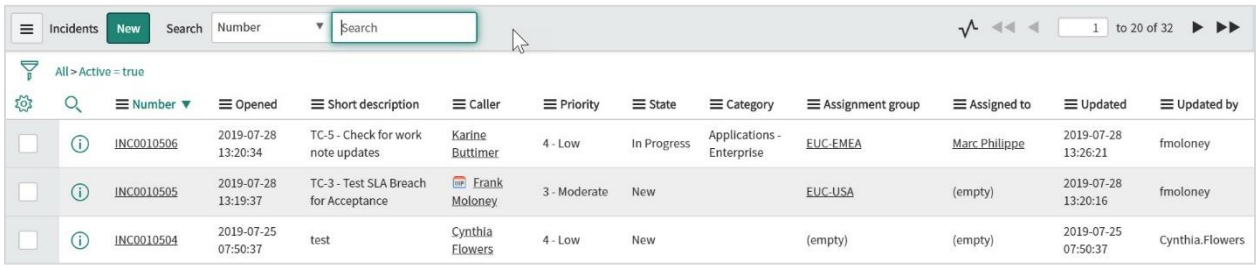


Figure 9 – Service Desk Menu, Incident List

Incidents called Over 10 Minutes

All Incidents still in progress that have not been accepted or rejected within a 10-minute period are displayed in list format.

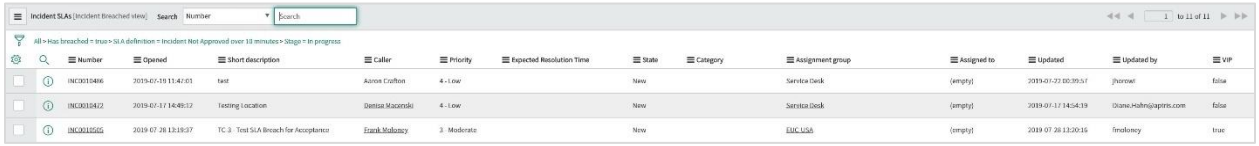


Figure 10 – Service Desk Menu, Incidents called Over 10 Minutes List

Knowledge

Opens the Knowledge homepage, showing articles by **Categories** or by **Tags**. You can view **All** items, **Articles** only, or **Questions** only. Articles can be sorted by **Last updated** or by **Views**.

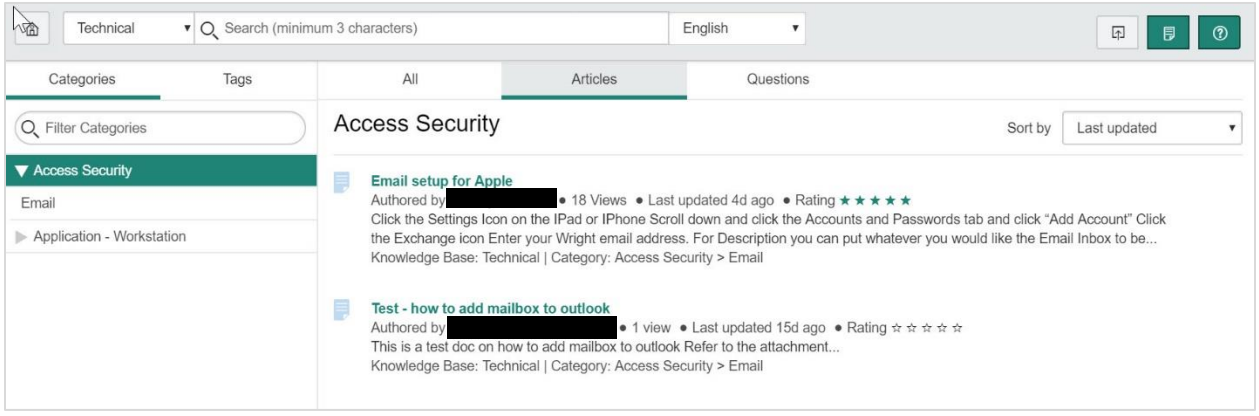


Figure 11 – Service Desk Menu, Knowledge Homepage

Options on this screen include:

- **Home** – Click to return to **Categories** view.
- **Knowledge Base type** – Displays options of article types: Technical (ITIL view); Self Help (end users view)
- **Search** – Search for an article or question.
- **Language** – Select the language you prefer.
- **Import Articles** – Click to import new articles.

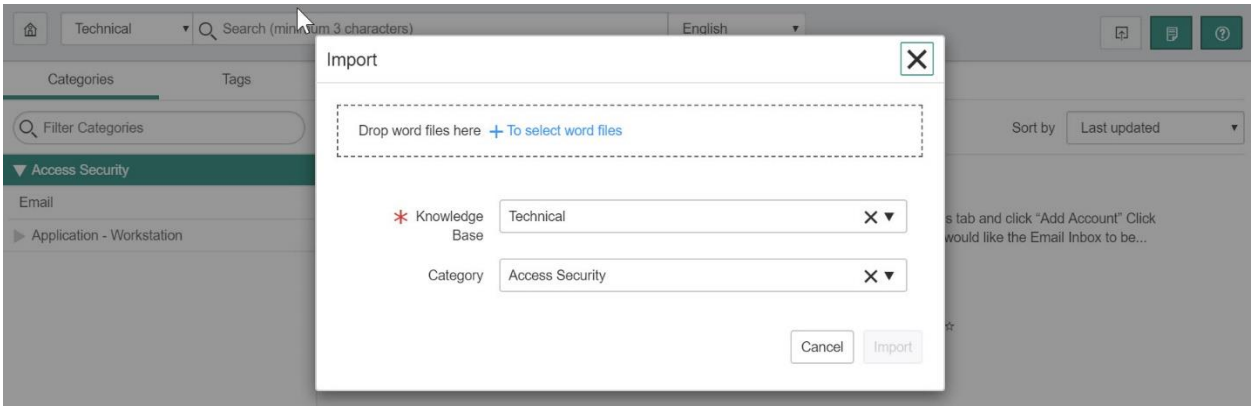


Figure 12 – Service Desk Menu, Knowledge – Import Articles

  - Select a file.
  - Select **Knowledge Base type**.
  - Select **Category**.
- **Create an Article** – Click to create a new article.
  - Select the **Article Template**: **Standard**, **How To**, **Known Error article**, **What Is**.
  - Fill out the form

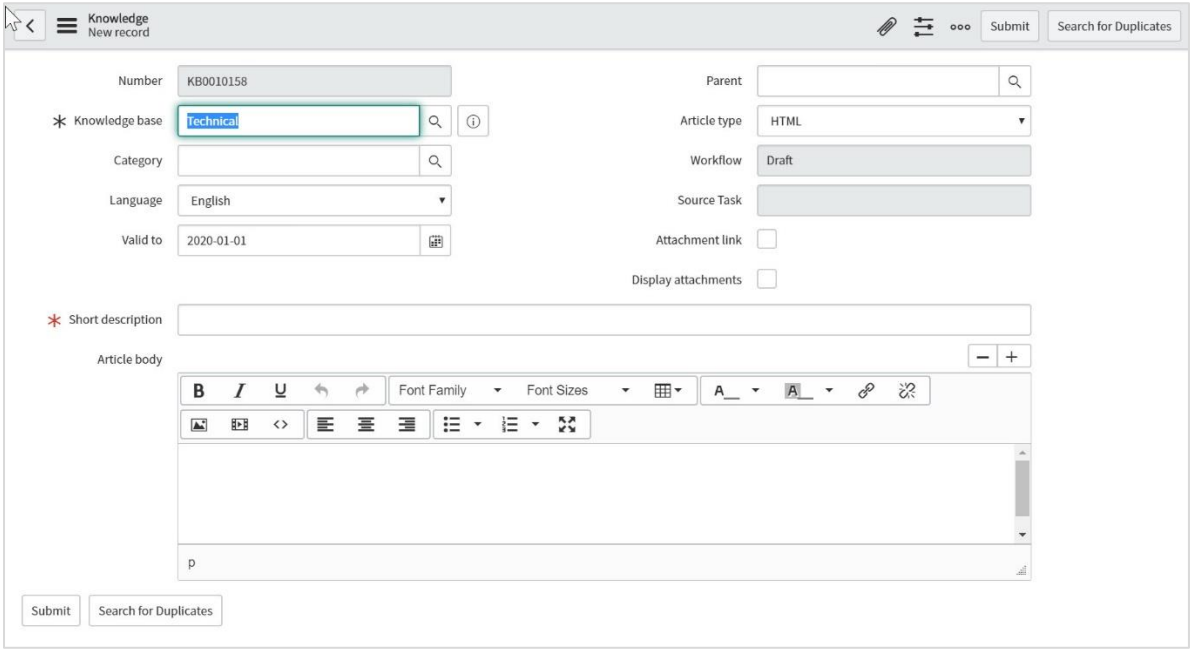


Figure 13 – Service Desk Menu, Knowledge – New Article Form

  - Click **Search for Duplicates** to ensure there are no existing articles.

- Right click and select **Save**.
- Click **Publish**. This puts the article in **Review** state for a Knowledge Manager to review and publish.

- **Post a Question** – Click to post a question.

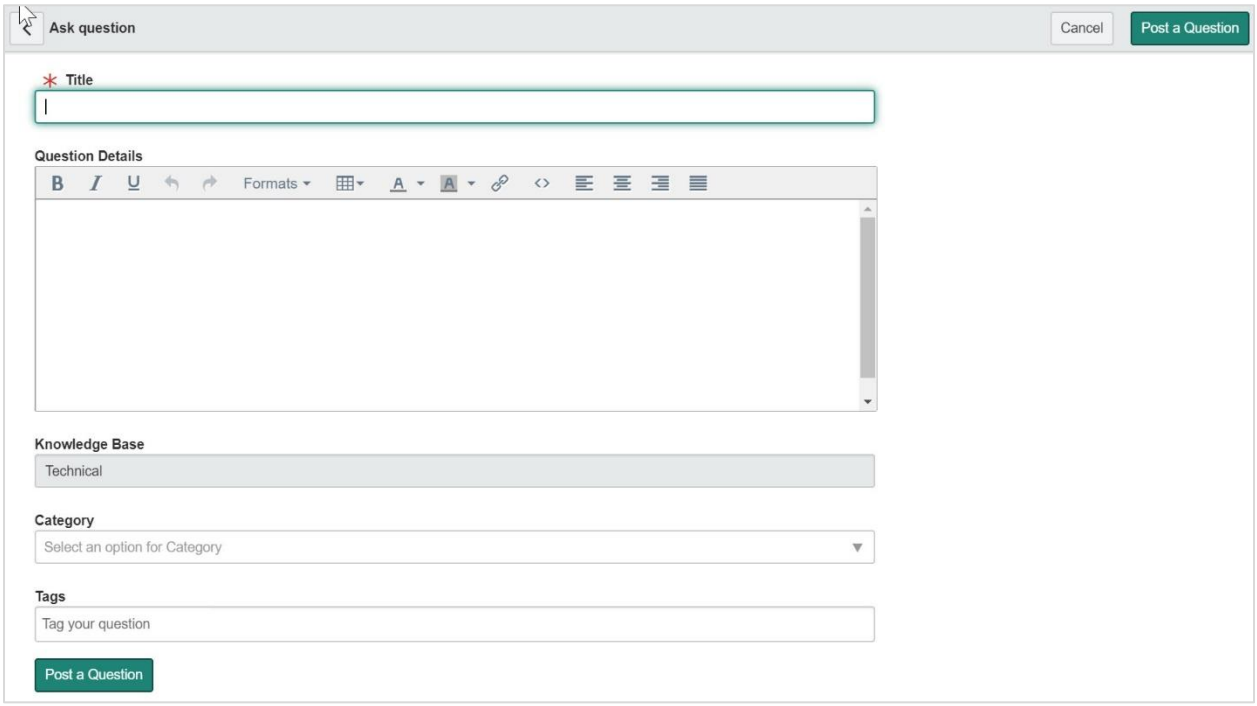


Figure 14 – Service Desk Menu, Knowledge – Ask Question Form

- Fill out the form and click **Post a Question**.

My Work

All work assigned to you is displayed in list format.

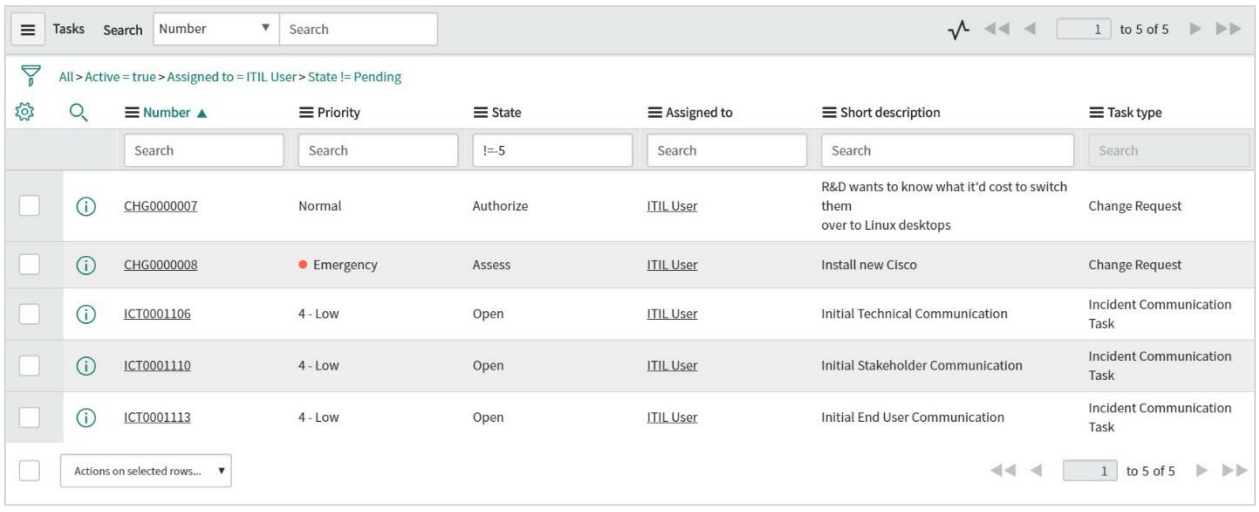


Figure 15 – Service Desk Menu, My Work List

My Groups Work

Work assigned to your group is displayed in list format.

My Approvals

All approvals assigned to you are displayed in list format. Click a row to view the entry.

SLAs Menu

All SLAs for My Work and My Groups Work are displayed in list format. Click a row to view the entry.

Calls Menu

- **New Call** – Opens a form for creating a new call, which is a quick way to record an interaction with a user.
  Calls are created automatically by email, as it is not yet known to be an incident or a request.

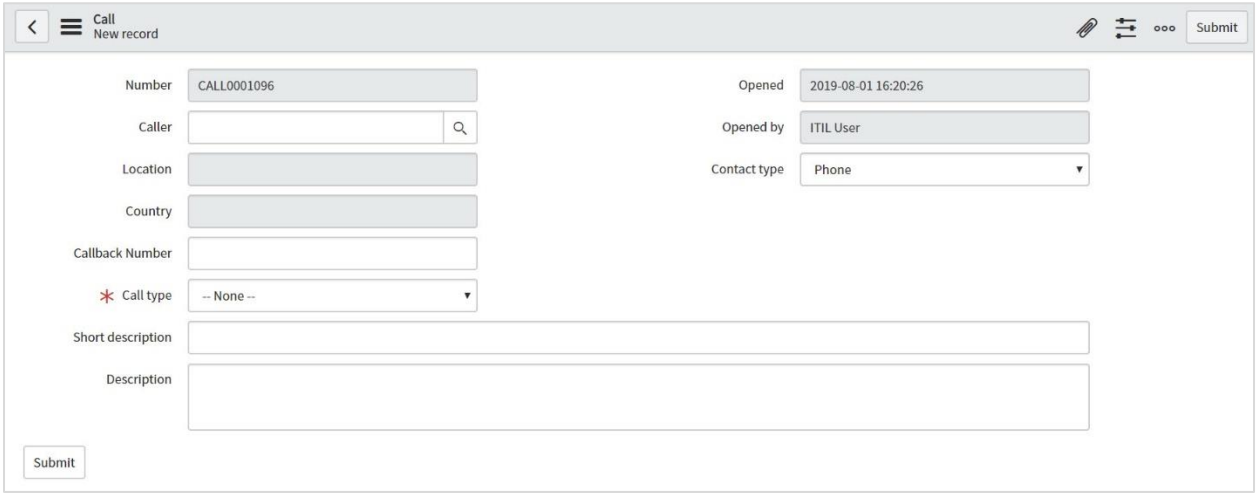


Figure 16 – Service Desk Menu, Calls Menu – Create New Call

- **My Calls** – All calls assigned to you are displayed in list format.
- **My Open Calls** – All open calls assigned to you are displayed in list format.
- **All Open Calls** – All open calls, regardless of assignee, are displayed in list format.
- **Email Triage** – All emails in need of triage are displayed in list format. View a record to determine the **Call type**.

Service Requests Menu

Service requests are enhancements and ideas, including SPARK ideas, that users submit for consideration.

The following options are available under the Service Requests application in the left menu. Click an item to see the description.

- Create New

- Assigned to me
- Open
- Open – Unassigned
- Closed
- All

Create New

Opens a form for creating a new Service Request.

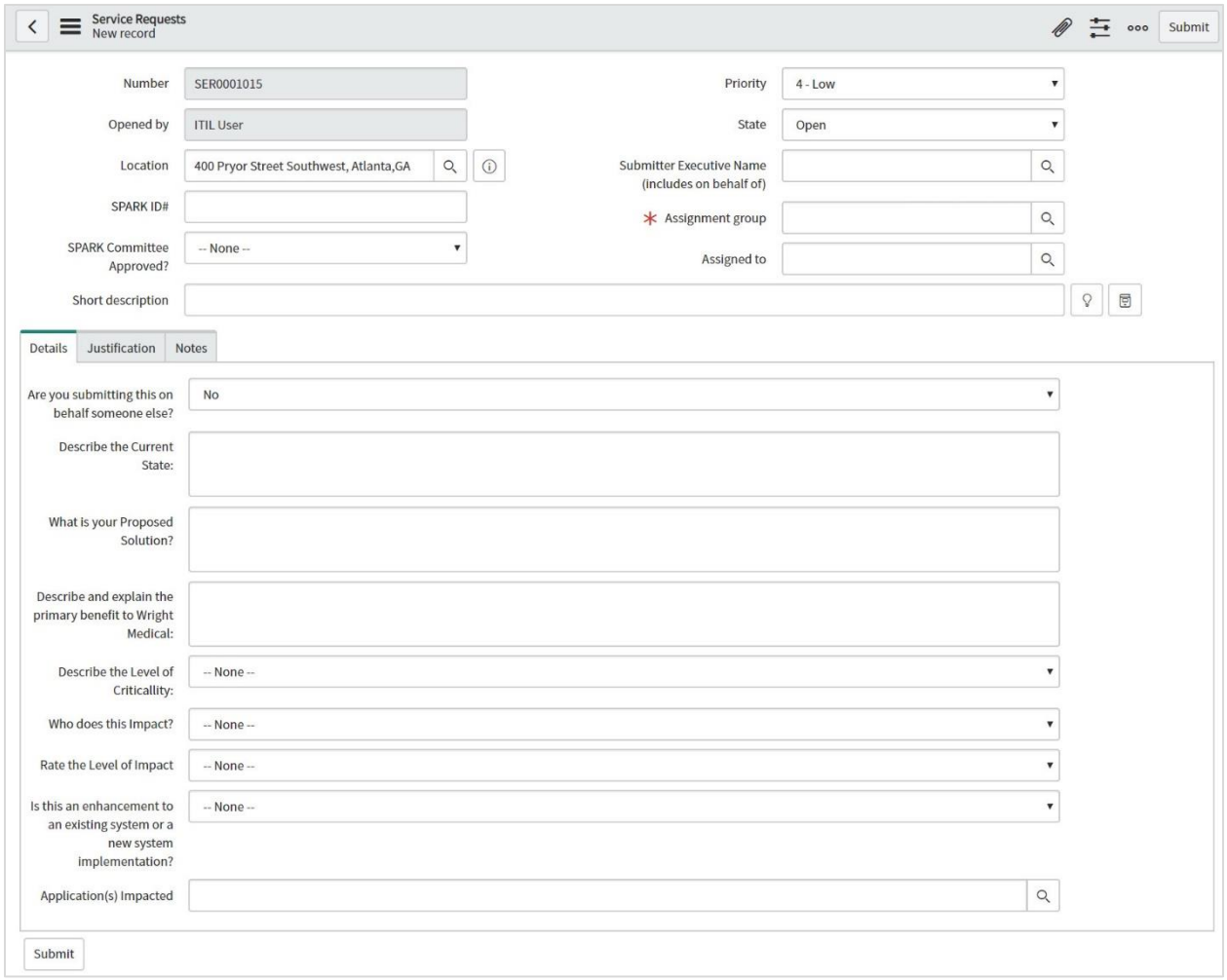


Figure 17 – Service Requests Menu, Create New Service Request

Banner options:

- **Additional actions** menu
- **Manage Attachments**
- **Show Activity Stream** – Appears after the Service Request is submitted.
- **Personalize Form**

- **More options** – Includes Toggle Template Bar and when saved shows options for emailing and adding tags.
- **Submit**
- **Follow** menu – Appears after the Service Request is submitted.
- **Update** – Appears after the Service Request is submitted.
- **Delete** – Appears after the Service Request is submitted.
- Arrows – Appear after the Service Request is submitted. Click to view the previous or next Service Request entry.

Filling out a Service Request form:

- Fill out the form, including any required Information.
- Fill out information in tabs, if applicable:
    - **Details**
    - **Justification**
    - **Notes** – Click **Work notes** to make notes that are not visible to customers; uncheck to make a note visible to a customer before clicking **Post**.
- Click **Submit**.
- The new record is added to Service Requests.

Update and **Delete** buttons appear at the bottom of the screen after the Service Request is submitted.

Assigned to Me

All Service Requests assigned to you are displayed in list format. Click a row to view the entry.

Open

All open Service Requests are displayed in list format. Click a row to view the entry.

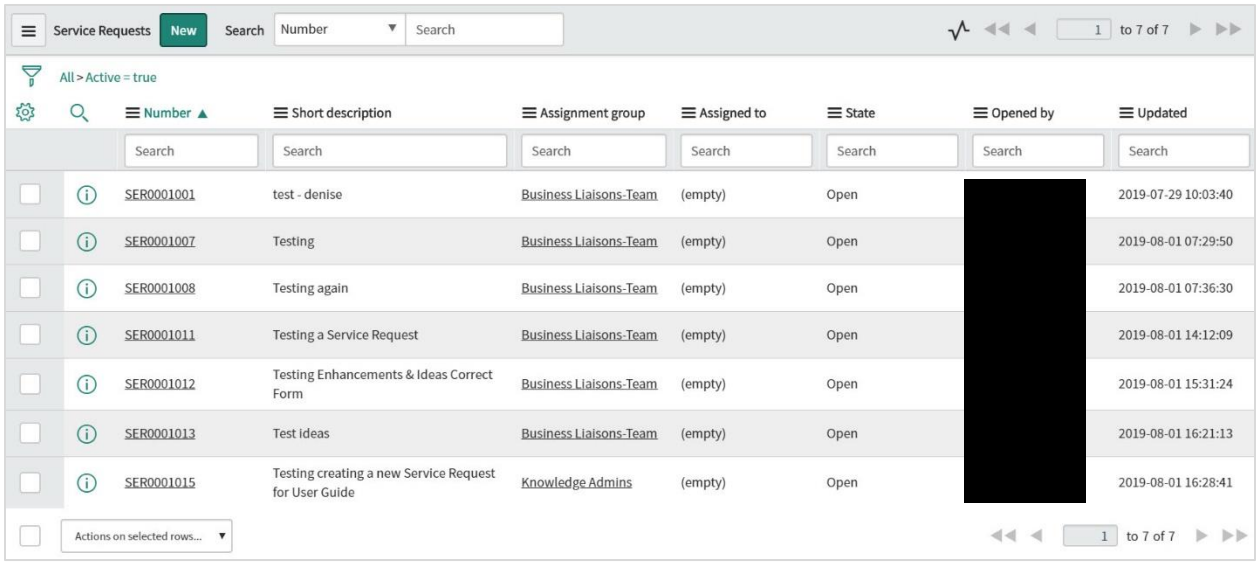


Figure 18 – Service Requests Menu, Open Service Requests List

Open – Unassigned

All open Service Requests that have not been assigned are displayed in list format. Click a row to view the entry.

Closed

All closed Service Requests are displayed in list format. Click a row to view the entry.

All

All Service Requests are displayed in list format. Click a row to view the entry.

Incident Menu

The following options are available under the Service Requests application in the left menu. Click an item to see the description.

- Create New
- Assigned to Me
- Open
- Open - Unassigned
- Incidents called Over 10 Minutes
- Resolved
- All
- Overview
- Critical Incidents Map
- Major Incidents Menu

Create New

Click to open a form for creating a new Incident.

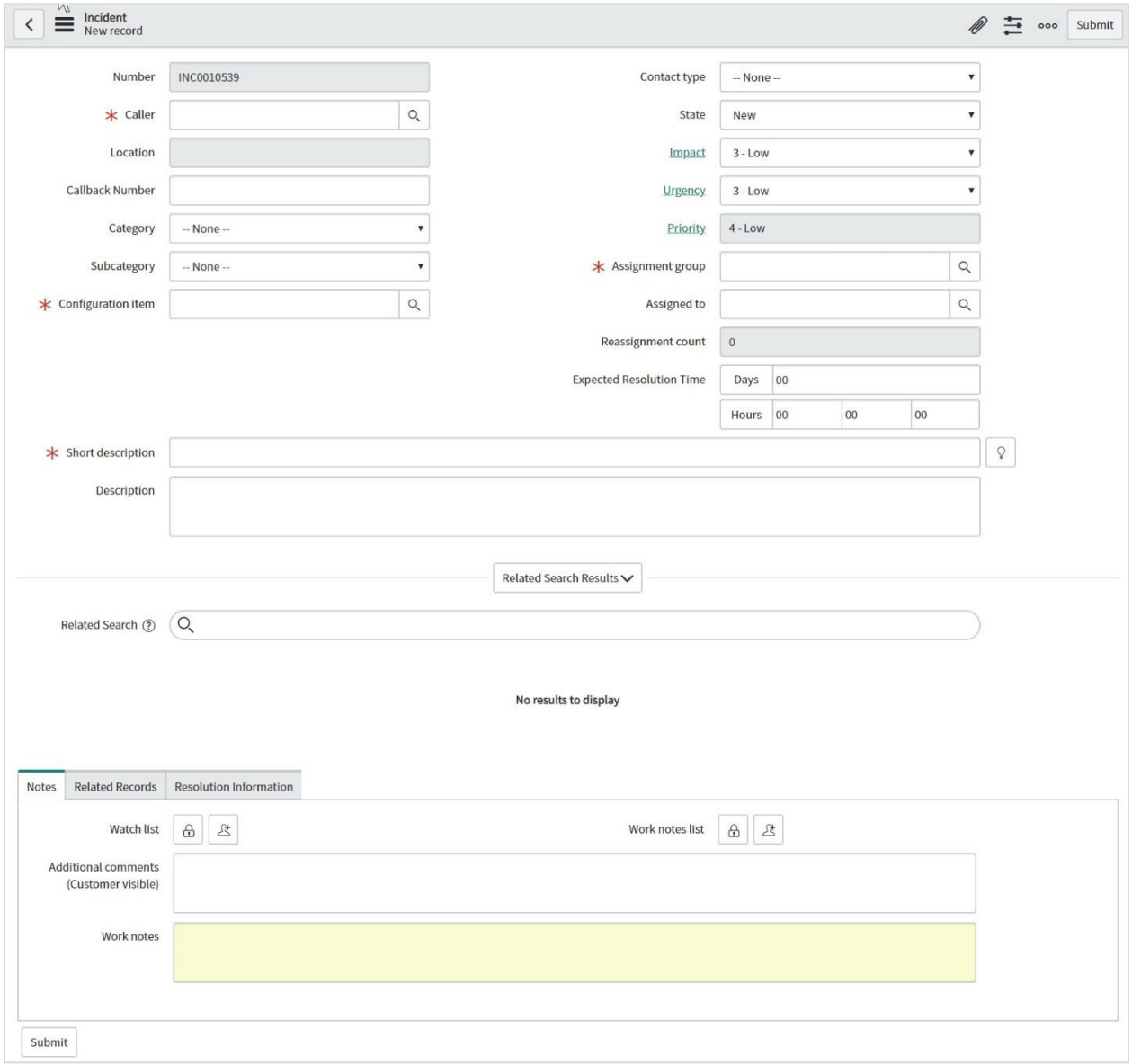


Figure 19 – Incident Menu, Create New Incident

Banner options:

- **Additional actions** menu
- **Manage Attachments**
- **Show Activity Stream** – Appears after the Incident is submitted.
- **Personalize Form**
- **More options** – Includes Toggle Template Bar and when saved shows options for emailing and adding tags.

- **Submit**
- **Follow** menu – Appears after the Incident is submitted.
- **Update** – Appears after the Incident is submitted.
- **Accept** – Appears after the Incident is submitted.
- **Reject** – Appears after the Incident is submitted.
- **Delete** – Appears after the Service Request is submitted.
- Arrows – Appear after the Service Request is submitted. Click to view the previous or next Service Request entry.

Filling out an Incident form:

- Number and Location populate automatically. Fields in grey are not editable.
- Enter the **Caller's** name or click the Search icon to search for the user.
- The following are mandatory fields:
  - **Caller**
  - **Configuration item**
  - **Assignment group**
  - **Short Description**
- **State**
  - **New** – When an Incident is created but has not been assigned.
  - **In Progress** – When **Assigned To** is populated.
  - **On Hold** – For Incidents that are on hold; an **On hold reason** is required.
- Click **Impact** or **Urgency** to open Knowledge articles with details associated to each topic.
- **Priority** choices are automatically assigned based on the selections for **Impact** and **Urgency**. (Priority calculations are different for VIP users; VIP users are upgraded with 1.)
  - 1 - Critical – Impact and Urgency set to high
  - 2 - High – Either Impact or Urgency set to high and other choice set to medium
  - 3 - Moderate – Impact and Urgency set to medium; or Impact set to low and Urgency set to high; or Impact set to high and Urgency set to low
  - 4 - Low – Impact and Urgency set to Low; or Impact set to low and Urgency set to medium

Related Search Results appear below the form as you fill it out, showing related Incidents or Knowledge articles.

Tabs

- **Notes** – Record notes regarding Incident and send notes to user. **Work notes** with a yellow border can only be viewed internally; **Additional comments** with a black border can be viewed by the user. **Field changes** and **system** notes are noted with a grey border.
- **Related Records**
- **Resolution Information**
- **Task SLAs**
- **Affected CIs**
- **Impacted Services/CIs**

- **Child Incidents**
- **Incident Communication Plans**
- **Outage**s

An asterisk (*) appears with tab headings when they contain mandatory fields.

Users will receive a notification when their Incident is closed, along with a survey.

Resolved Incidents will automatically be closed after 10 days of inactivity and the Closed code will be "User did not respond."

Assigned to Me

All Incidents assigned to you are displayed in list format. Click a row to view the entry.

Open

All open Incidents are displayed in list format. Click a row to view the entry.

Open – Unassigned

All open Incidents that have not been assigned are displayed in list format. Click a row to view the entry.

Incidents called Over 10 Minutes

All Incidents still in progress that have not been accepted or rejected within a 10-minute period are displayed in list format.

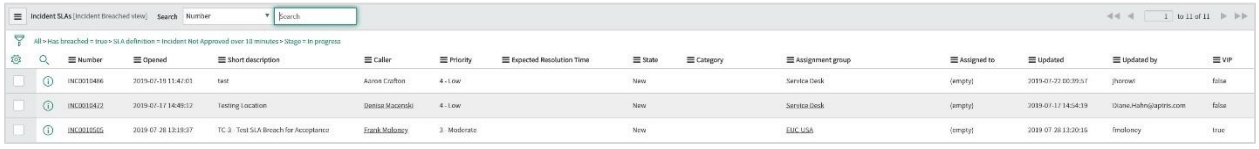


Figure 20 – Incident Menu, Incidents called Over 10 Minutes List

Resolved

All resolved Incidents are displayed in list format. Click a row to view the entry.

All

All Incidents are displayed in list format. Click a row to view the entry.

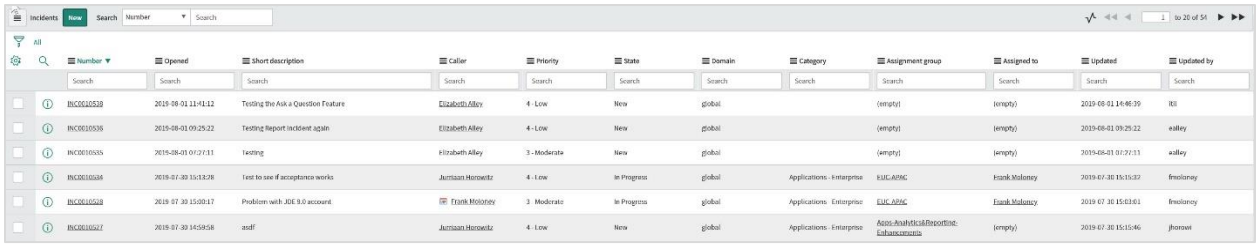


Figure 21 – Incident Menu, All Incidents List

Overview

Incident data is displayed in dashboard format.

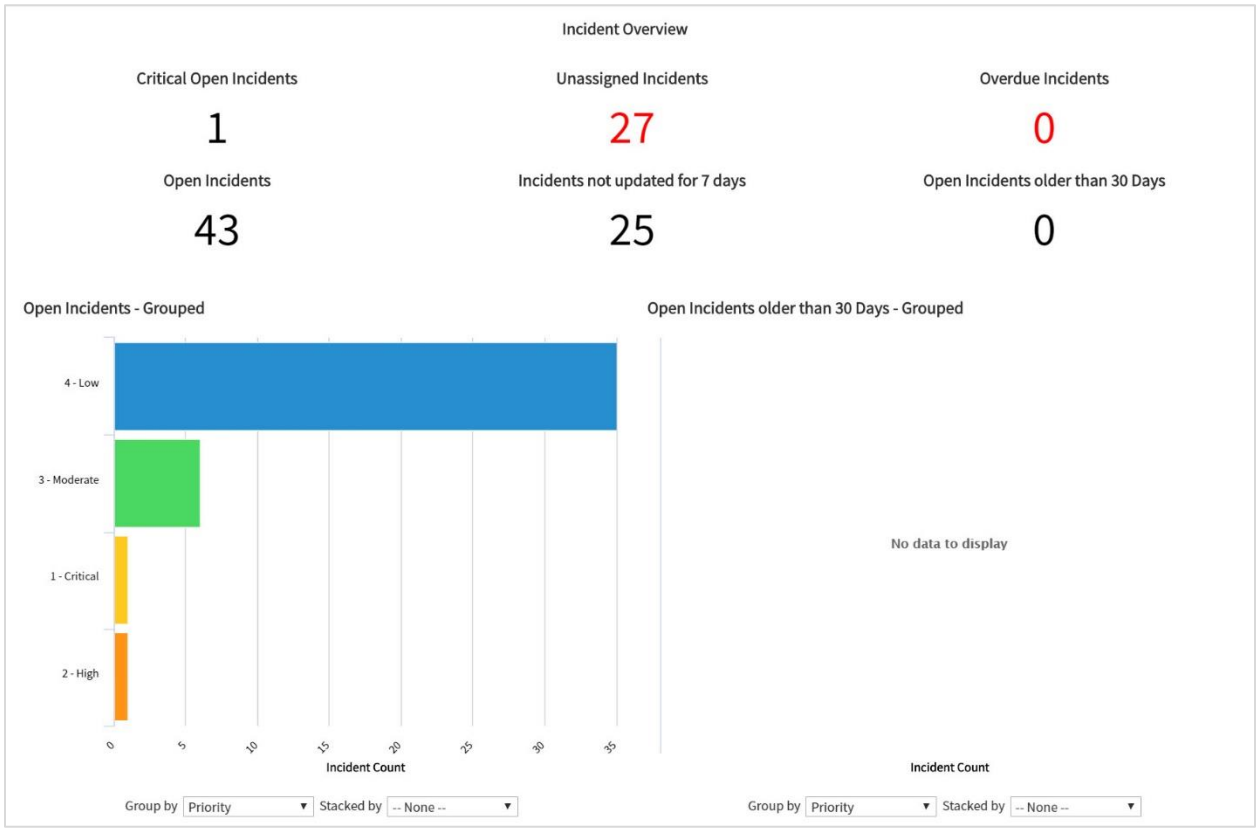


Figure 22 – Incidents Menu, Incidents Overview

Critical Incidents Map

Map showing locations of Critical Incidents.

Major Incidents Menu

- **Overview** – Shows major Incident data in dashboard format. Other tabs display list views of **Major Incident Candidates**, **Active Major Incidents**, **Resolved Major Incidents**.

- Create Major Incident Candidate – Click to open a form for creating a record for Major Incident Candidate.

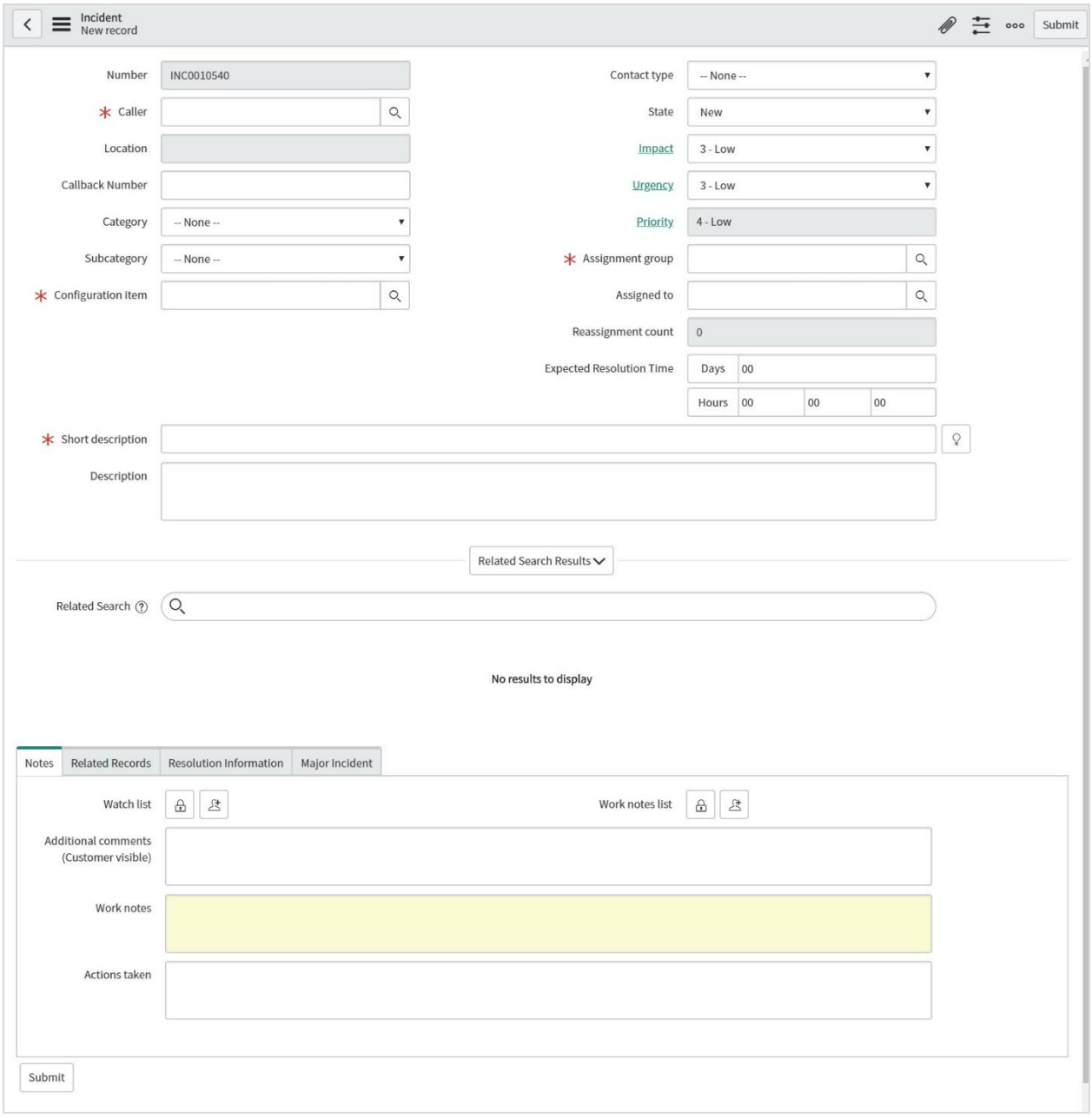


Figure 23 – Incident Menu, Create Major Incident Candidate Form

- Candidates – All Major Incident Candidates are displayed in list format. Click a row to view the entry.
- Open – All open Major Incidents are displayed in list format. Click a row to view the entry.
- All – All Major Incidents are displayed in list format. Click a row to view the entry.

Problem Menu

The following options are available under the Problem application in the left menu. Click an item to see the description.

- Create New
- Known Errors
- Open
- Open – Unassigned
- Pending
- All
- Overview

Create New

Click to open a form for creating a new Problem.

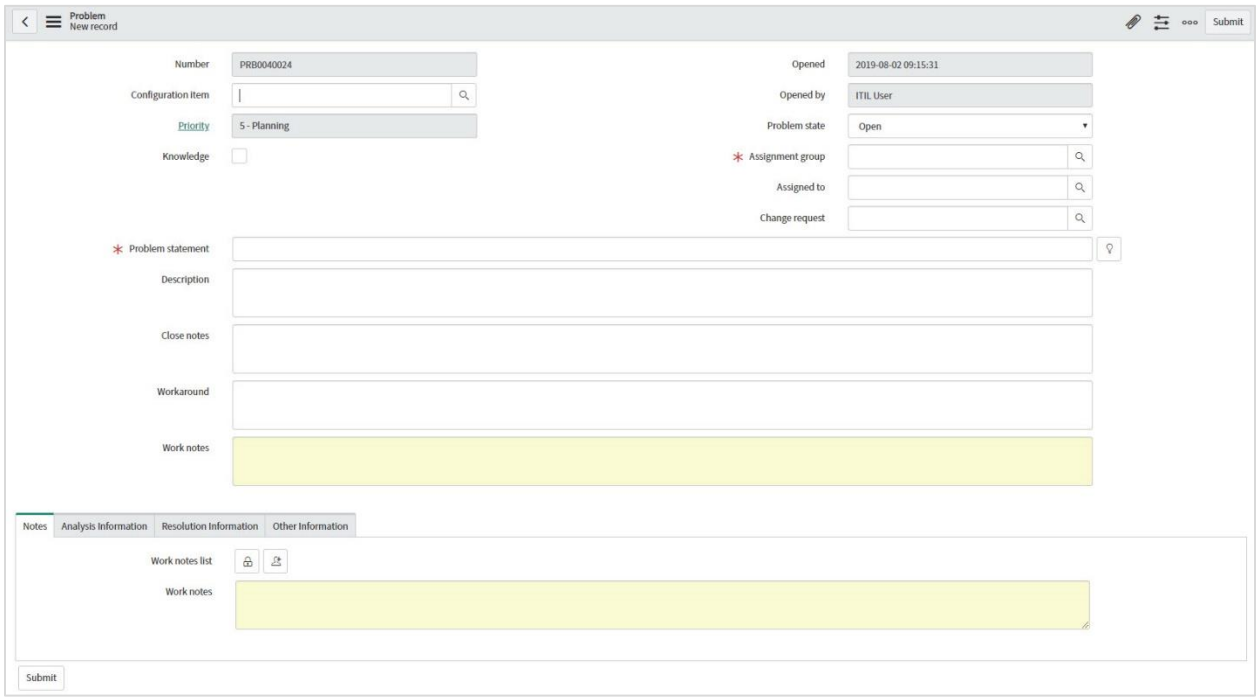


Figure 24 – Problem Menu, Create New Problem

The following are mandatory fields:

- **Assignment group**
- **Problem statement**

Problem ticket can be created from an Incident record by selecting **Create Problem** from the top left menu.

Tabs:

- **Notes** – Record notes regarding Incident and send notes to user. **Work notes** with a yellow border can only be viewed internally; **Additional comments** with a black border can be viewed by the user. **Field changes** and **system** notes are noted with a grey border.
- **Analysis Information** – Attach existing articles, discuss workarounds, etc.
- **Resolution Information**
- **Other Information** – Who closed it, when it was closed, etc.
- **Incidents** – Add related Incidents or create new related Incidents.
- **Affected CIs** – Lists Configuration Items affected by this Problem.
- **Problem Tasks**
- **Change Requests**
- **Outages**

Known Errors

All Known Errors are displayed in list format. Click a row to view the entry.

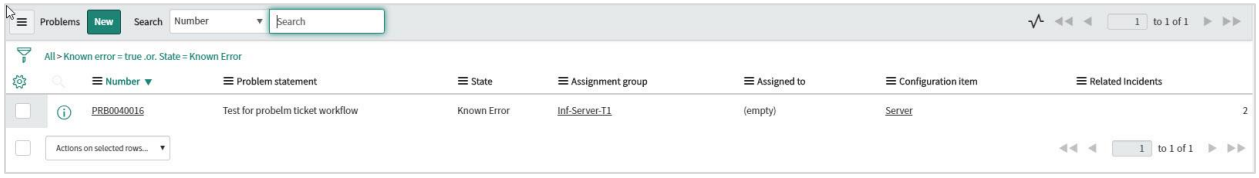


Figure 25 – Problem Menu, Known Errors List

Open

All open Problems are displayed in list format. Click a row to view the entry.

Open – Unassigned

All open Problems that have not been assigned are displayed in list format. Click a row to view the entry.

Pending

All pending Problems are displayed in list format. Click a row to view the entry.

All

All Problems are displayed in list format. Click a row to view the entry.

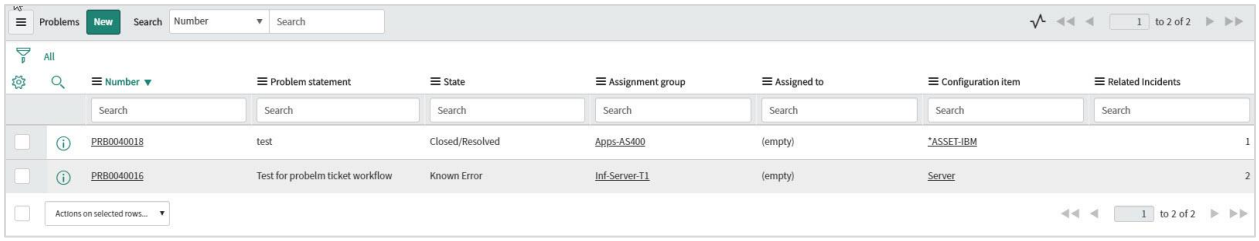


Figure 26 – Problems Menu, All Problems List

Overview

Problems data is displayed in dashboard format.

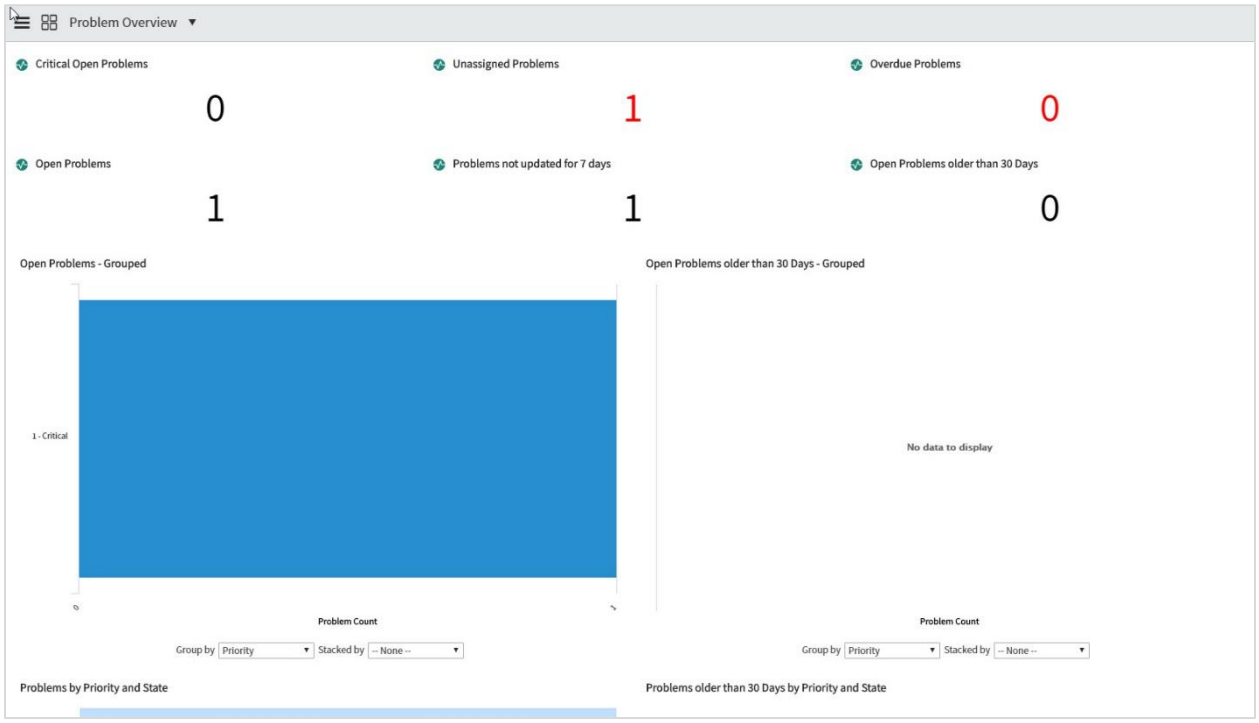


Figure 27 – Problems Menu, Problems Overview

Change Management

IT Change Management is the process of requesting, analyzing, approving, developing, implementing, and reviewing a planned or unplanned change within the IT production environment. The Change Management Process begins with the creation of a Change Request within ServiceNow and ends with the satisfactory implementation of the change and communication of the result of that change to all interested parties.

The Change Management Process Flow shows the Change Request procedures:

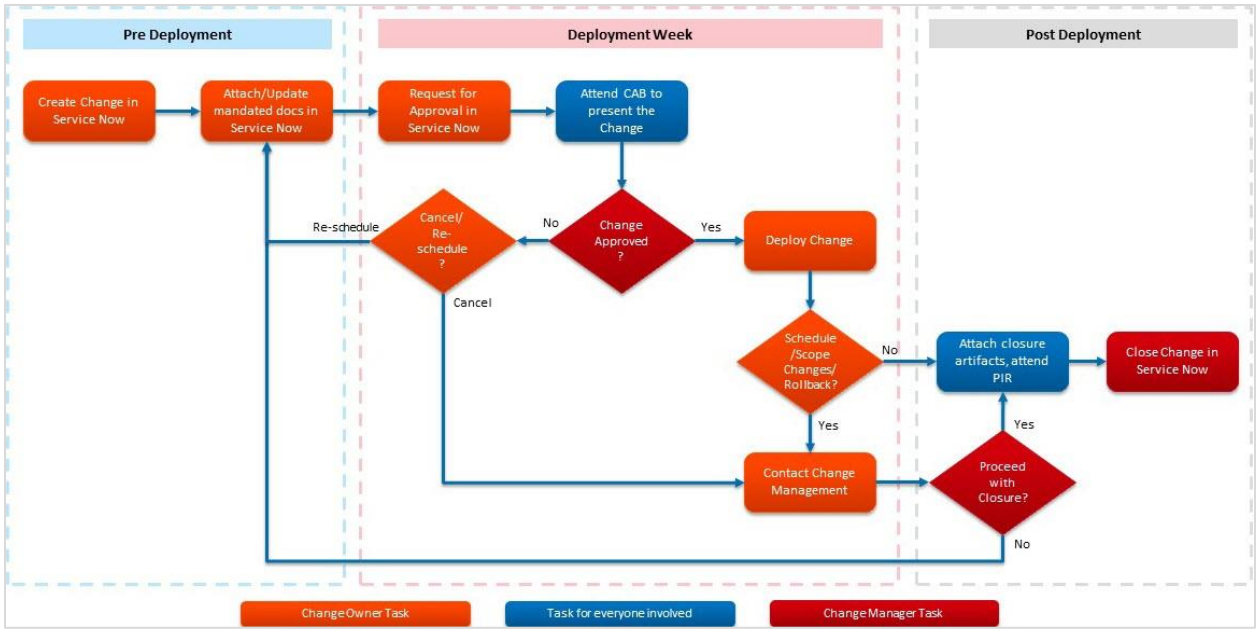


Figure 28 - Change Management Process Flow

Change Menu

The following options are available under the Change application in the left menu. Click an item to see the description.

- Create New
- Open
- Closed
- All
- Overview

Create New

Click to start process for creating new Change Request. Select a response to **What type of change is required?**

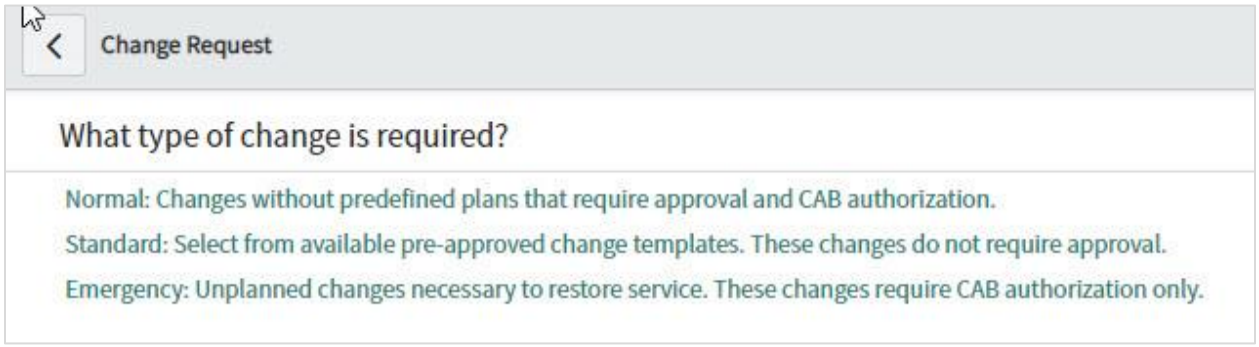


Figure 29 – Change Menu, Change Request Type

Normal Change Request

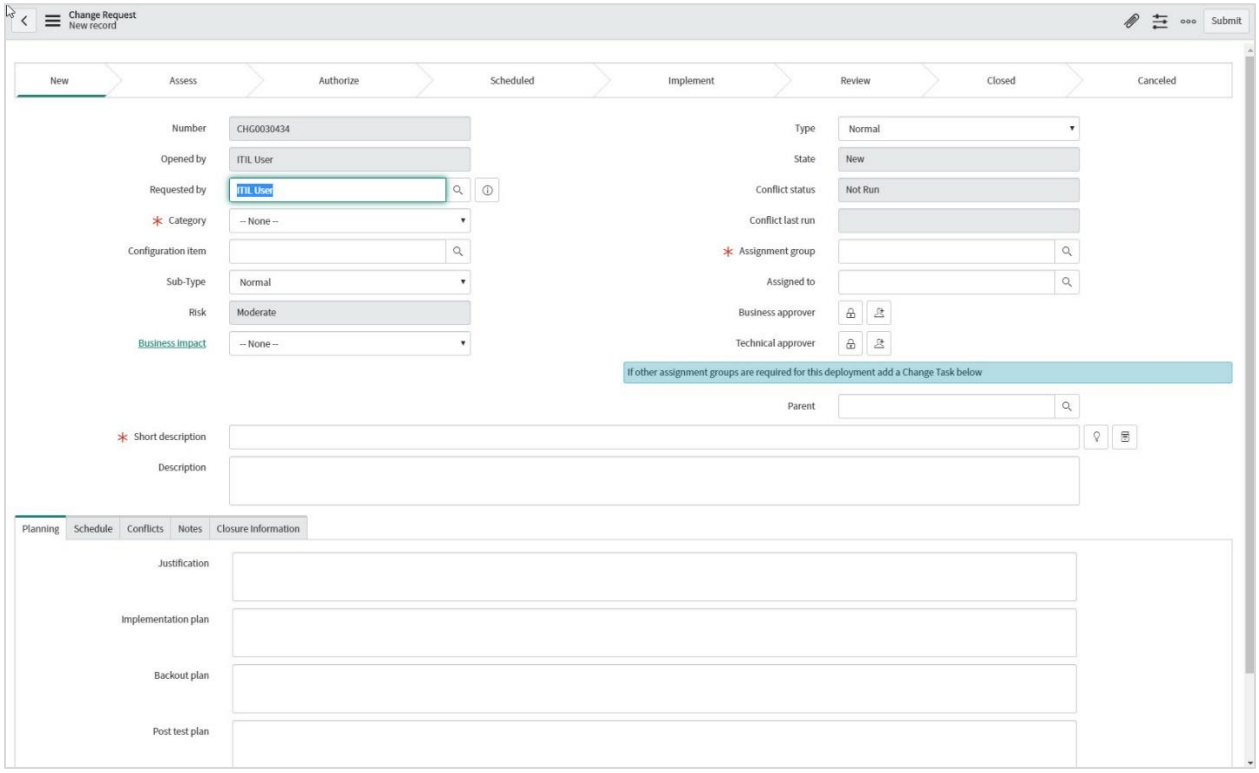


Figure 30 – Change Menu, Create New Change Request (Normal)

The following are mandatory fields to save as New:

- **Category**
- **Assignment group**
- **Short description**

Tabs:

- **Planning**
- **Schedule**
- **Conflicts**
- **Notes**
- **Closure Information**
- **Affected CIs**
- **Impacted Services/CIs**
- **Approvers**
- **Change Tasks**
- **Problems**
- **Incidents Fixed By Change**
- **Incidents Caused By Change**
- **Task SLAs**

- **Outage**s

Standard Change Request

More information coming soon.

Emergency Change Request

The following are mandatory fields to move to **Scheduled** state:

- **Short description**
- **Assignment group**
- Four approvals from the eCAB Approval group

NOTE: See the Change Management Process Flow document (**Figure 28**) for more information about Change Request procedures.

Open

All open Change Requests are displayed in list format. Click a row to view the entry.

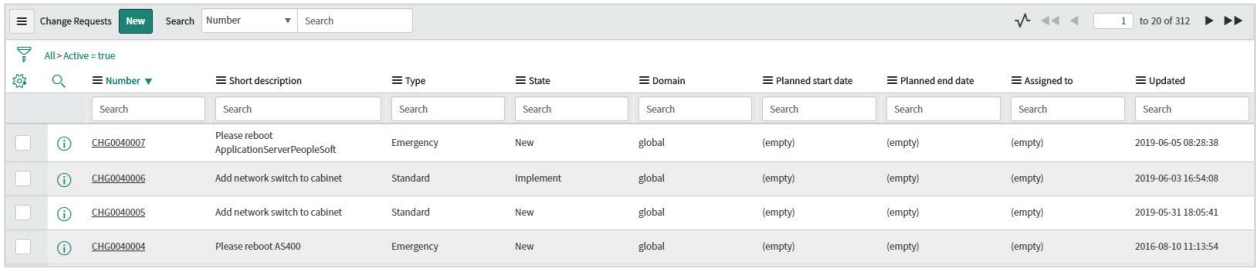


Figure 31 – Change Menu, All Open Change Requests

Closed

All closed Change Requests are displayed in list format. Click a row to view the entry.

All

All Change Requests are displayed in list format. Click a row to view the entry.

Overview

Change Request data is displayed in dashboard format.

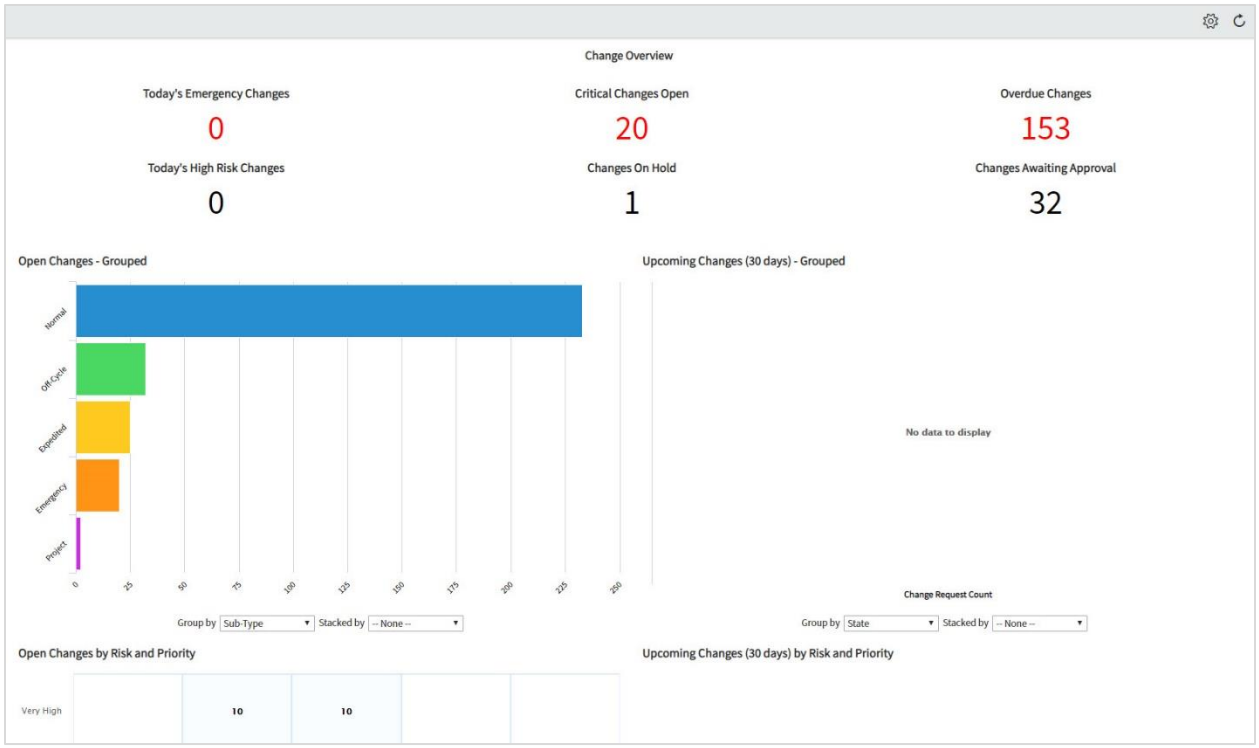


Figure 32 – Change Menu, Change Request Overview

Service Catalog

[redacted] service catalog is available to users from the TechPortal to request items and services that are fulfilled in ServiceNow.

Service Catalog Menu

The following options are available under the Service Catalog application in the left menu. Click an item to see the description.

- Catalogs
- Catalog
- Open Records Menu

Catalogs

Click to access [redacted] Service Catalog. Click the Service Catalog to open the selections available.

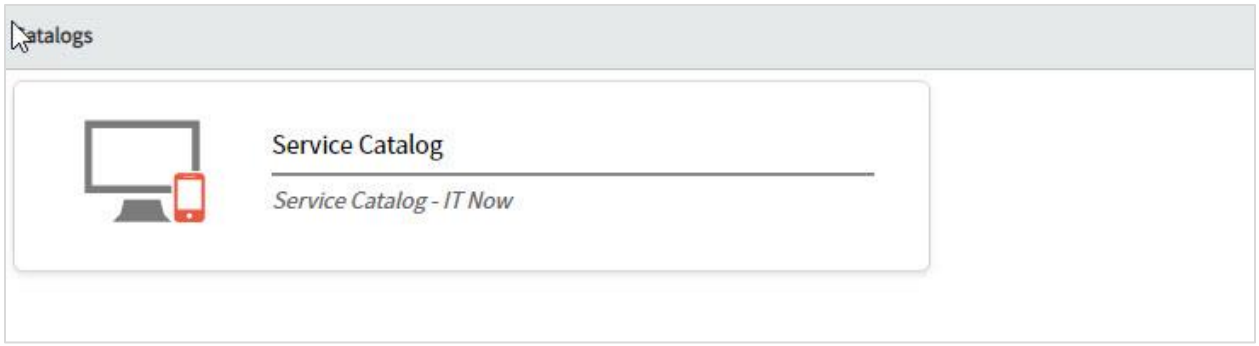


Figure 33 - Service Catalog Menu, [redacted] Service Catalog

Catalog

Click to open the selections available in the [redacted] Service Catalog.

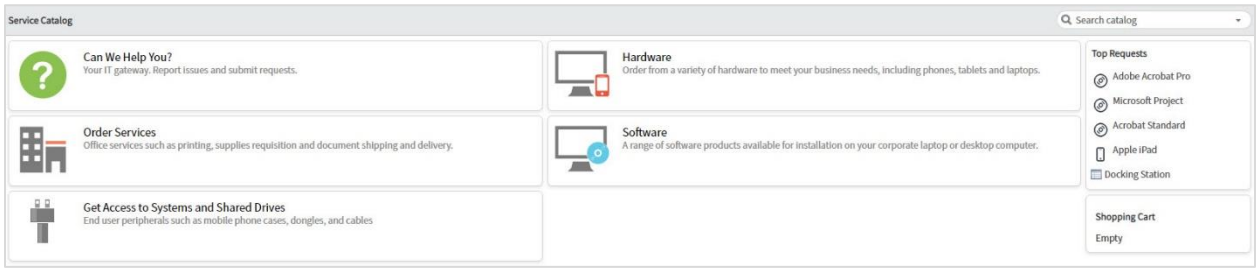


Figure 34 - Service Catalog Menu, Service Catalog Options

Click a selection to view the information about the catalog selection that appears in the TechPortal.

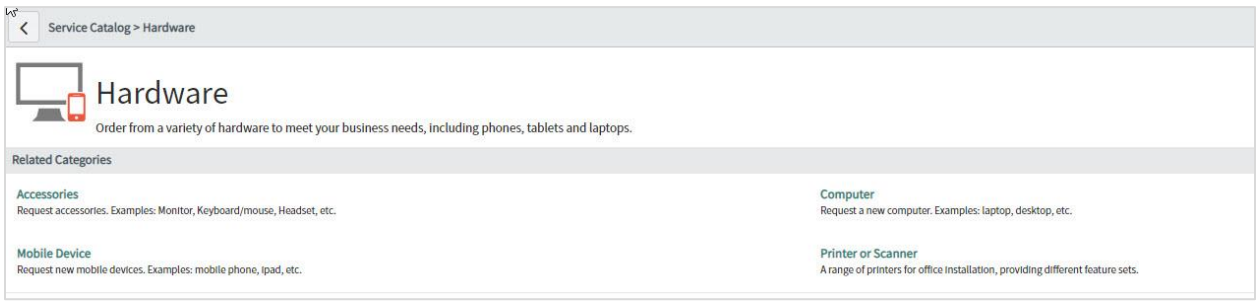


Figure 35 - Service Catalog Menu, Hardware Options

Open Records Menu

Shows the following options for Open Records:

- Requests – Requests are displayed in list format. Click a row to view the entry.

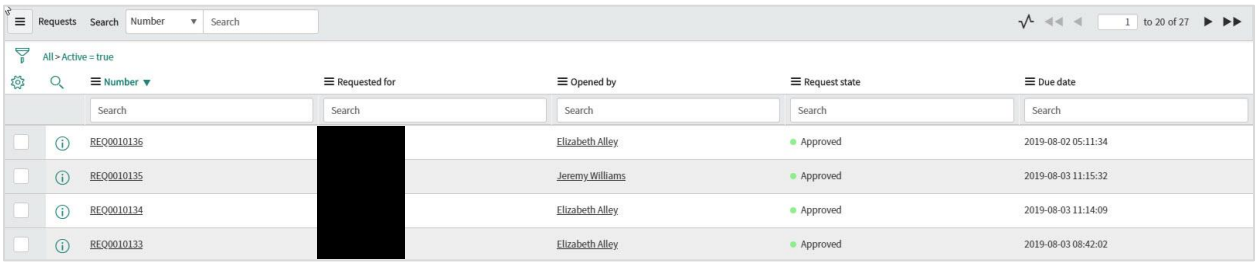


Figure 36 - Service Catalog Menu, Open Records – Requests

Requests Entry:

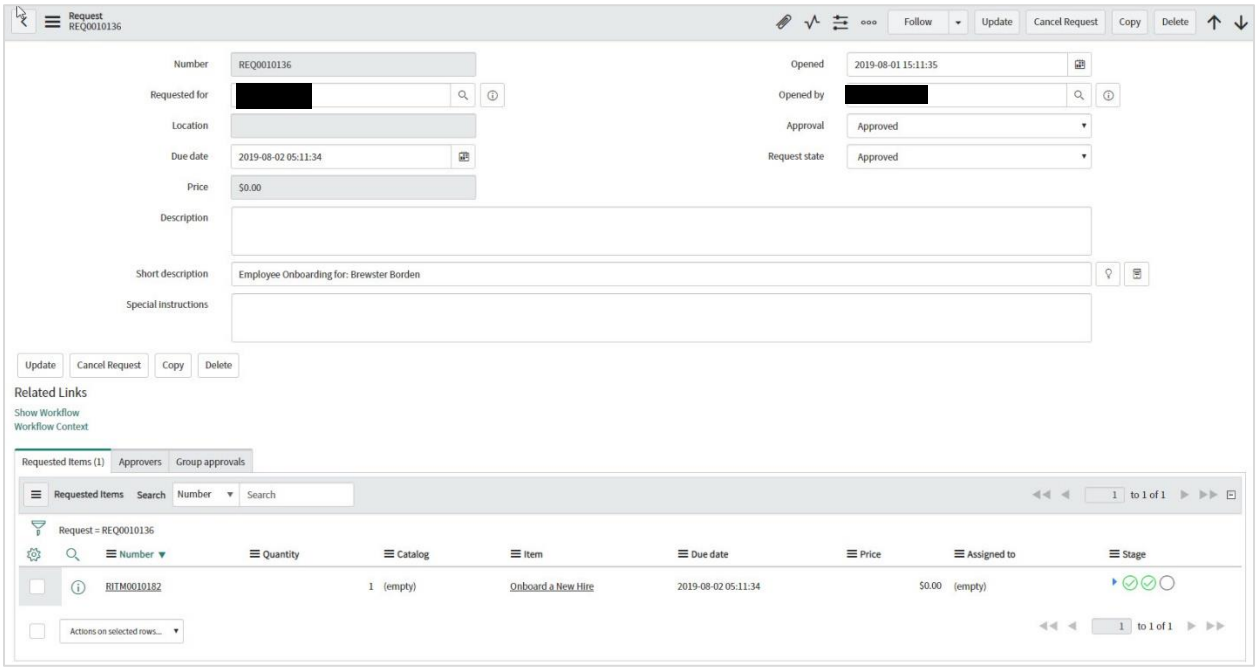


Figure 37 - Service Catalog, Request Entry

Click Number in the Requested Items tab to view the Requested Item details and scroll down to see the Catalog Tasks tab.

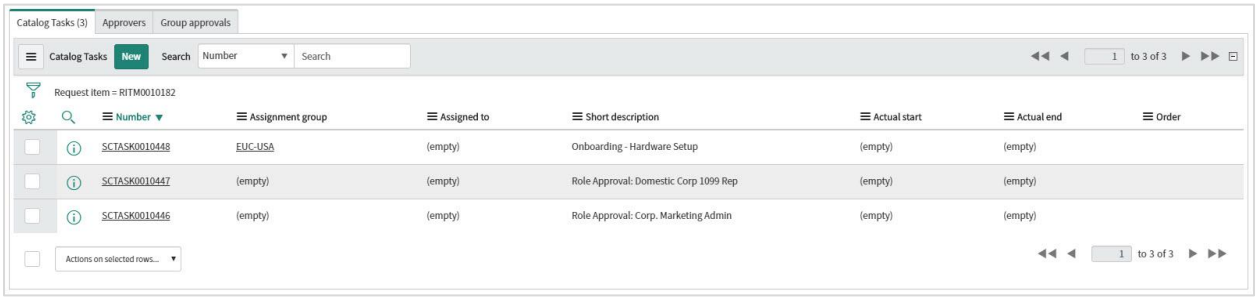


Figure 38 - Service Catalog Menu, Requested Items - Catalog Tasks

- Items – Items are displayed in list format. Click a row to view the entry.
- Tasks – Tasks are displayed in list format. Click a row to view the entry.

Knowledge Management

The following information is available in ServiceNow for Knowledge Management. Click any item to see more detailed information.

- Homepage
- Articles Menu

Homepage

The Knowledge Homepage displays knowledge articles and questions organized by knowledge base and category, as well as featured content and popular articles.

Your access to the Knowledge menu may be restricted depending on your access role.

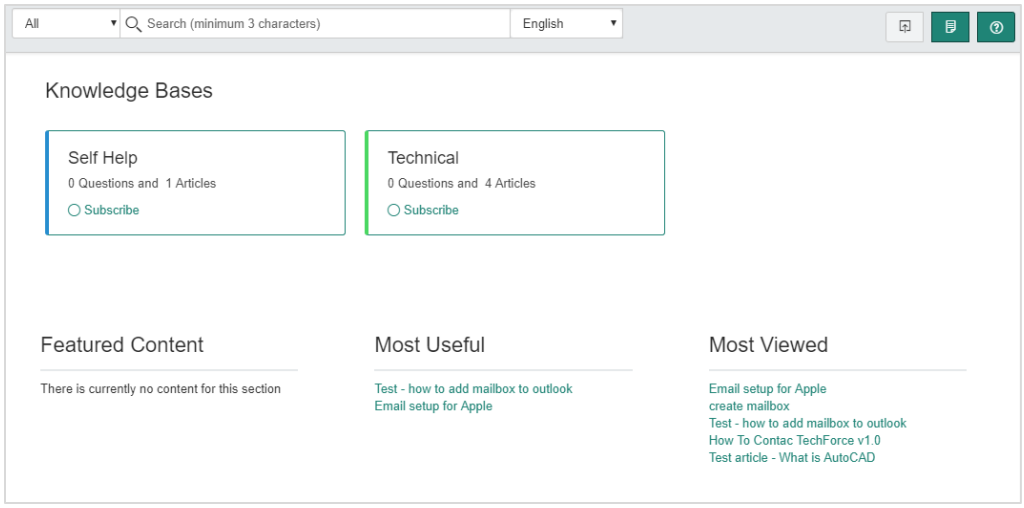


Figure 39 - Knowledge Bases

Articles Menu

The following options are available under the Service Catalog application in the left menu. Click an item to see the description.

- Create New
- Unpublished
- Published
- 30 Day Valid to Dates
- Retired
- All
- Open Submissions

- Ownership Groups Menu
- Feedback Management Menu

Create New

Click to start process for creating a new Article. Select a response to **Select the Article Template**:

Figure 40 - Knowledge Menu, Article Template Selector

Standard Article Template:

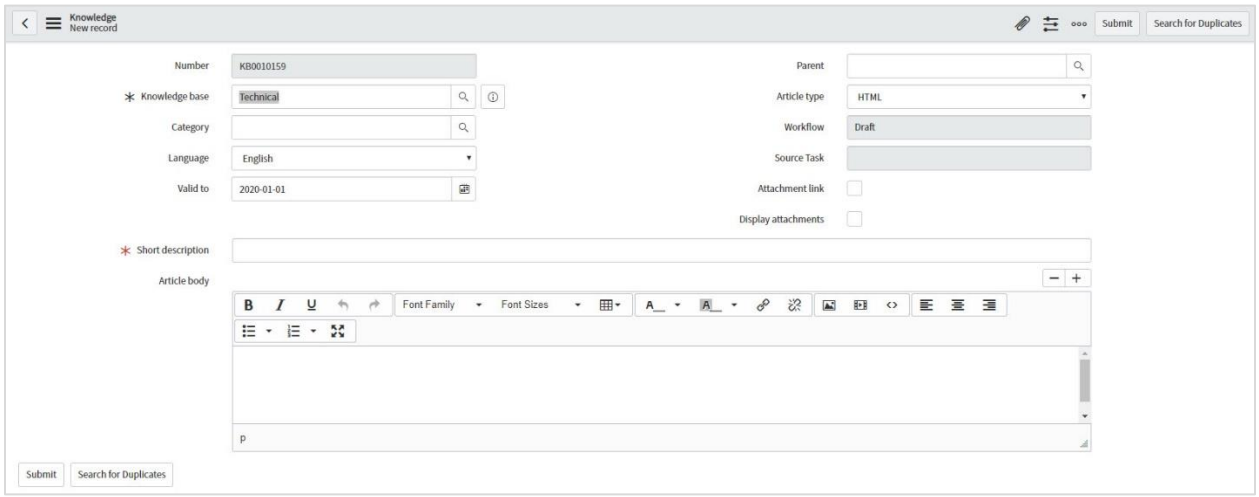


Figure 41 - Knowledge Menu, Standard Article Template

Filling out a Standard Article Template:

- **Short description** is a mandatory field.
- Before submitting your article, search for duplicate articles by clicking **Search for Duplicates**.

Unpublished

All unpublished Knowledge articles are displayed in list format. Click a row to view the entry.

This may not be visible depending on your access.

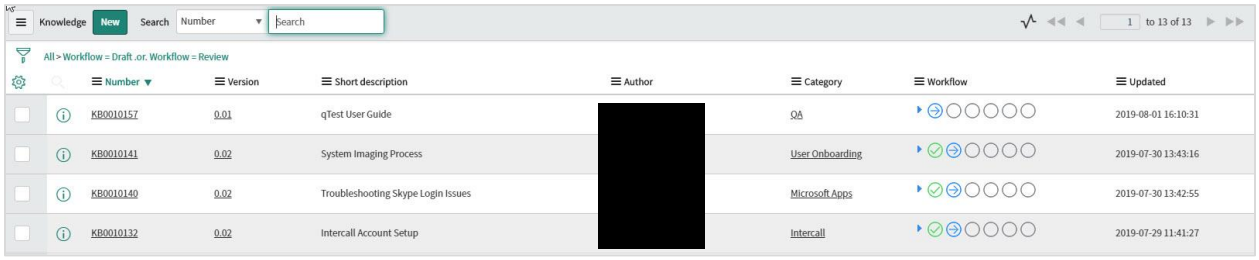


Figure 42 - Knowledge Menu, Unpublished Knowledge Articles

Published

All published Knowledge articles are displayed in list format. Click a row to view the entry.

30 Day Valid to Dates

All Knowledge articles valid within a 30-day timeframe are displayed in a list format. Click a row to view the entry.

This may not be visible depending on your access.

Retired

All retired Knowledge articles are displayed in list format. Click a row to view the entry.

This may not be visible depending on your access.

All

All Knowledge articles are displayed in list format. Click a row to view the entry.

This may not be visible depending on your access.

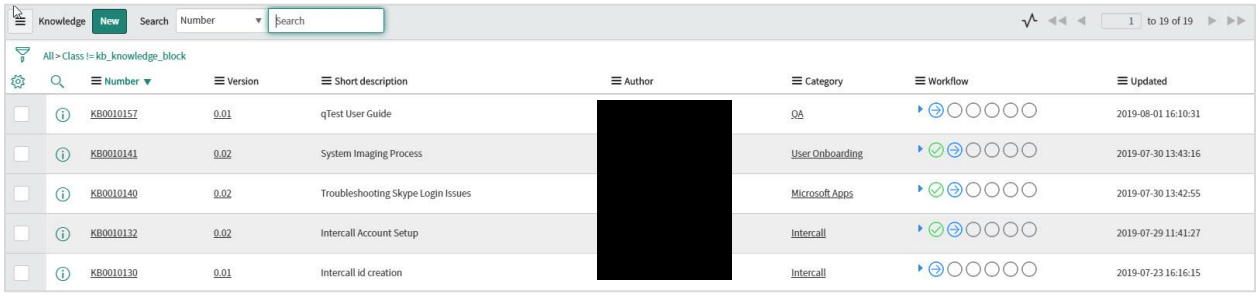


Figure 43 - Knowledge Menu, All Knowledge Articles

Open Submissions

All Open Submissions are displayed in list format. Click a row to view the entry.

This may not be visible depending on your access.

Ownership Groups Menu

This may not be visible depending on your access.

- Manage Group
- My Approvals
- My Pending Group Requests
- All Groups

Feedback Management Menu

- Feedback
- My Flagged
- All Flagged
- My Submitted Tasks
- My Assigned Tasks
- My Closed Tasks
- All Open Tasks
- All Closed Tasks

Table of Figures

COMMUNICATIONS

To: [redacted]

BCC: [redacted]

From: [redacted]

Date: July 7, 2022

Subject: Important IT changes on July 18 | OnePortal transition and Office 365 migration

[redacted]

As we continue the journey to integrate legacy [redacted] employees into [redacted], there are several important updates that will happen on **Monday, July 18**.

- [redacted] **OnePortal will be available for IT support and assistance.** [redacted] Service Desk will no longer be available.
- **Migration to** [redacted] **Office 365,** including Microsoft Teams, Office, SharePoint, One Drive and Outlook:
    - Start using your [redacted] email address as your primary email.
    - Start using Teams as your primary collaboration tool. You will receive invitations to Microsoft Teams training after July 18.
    - **Users outside of the US**: you received your [redacted] credentials today, July 7, from [redacted] IT Integration ([redacted]).
    - **See Migrate to** [redacted] **Office 365 instructions below**.

Follow these steps to access links in this email:

- Open an incognito window in Chrome by clicking the three-dot menu in the upper right corner of the browser window and selecting New incognito window.
- Copy the link and paste it in the address bar in the incognito window.
- Follow the log-in prompts using your [redacted] credentials.

[redacted] OnePortal for IT support

On Monday, July 18, Legacy [redacted] employees will utilize [redacted] **OnePortal** for their IT needs and assistance; [redacted] Service Desk will no longer be available. With OnePortal, you can:

- Submit and check the status of a ticket
- Call or chat with the support team
- Request IT equipment, hardware and access to applications
- Find common IT solutions in the Knowledge base
- View the scrolling ticker for major incident updates and IT news

For more information about this transition, check out the **OnePortal Frequently Asked Questions.** To learn more about OnePortal, **watch this video**.

Migrate to [redacted] Office 365

As we continue with the technical integration, you will begin to use your [redacted] credentials sent to you by [redacted] IT Integration ([redacted]). (**Users outside of the US**: you received your [redacted] credentials today, July 7.) Your [redacted] password will sync to your [redacted] account and password until July 31. After that, both account passwords will be managed separately.-

On **Monday, July 18**, you will be migrated to your [redacted] Office 365 account. To finalize the migration, and to **ensure your calendar stays intact and you receive your [redacted] and [redacted] emails**, you must complete the following steps **by Friday, July 15** and **on Monday, July 18 at 9:00 AM** (your local time).

Complete by Friday, July 15		
Steps/instructions	**Important to know**	**Details**
1 – Cancel or end-date recurring meetings	If you are the Organizer of any recurring meetings, **cancel or end-date those meetings with a date no later than July 15** to ensure your calendar remains intact.	**Note**: For this action, make note of the meetings before you cancel or end date them; you will need to reschedule these meetings after you are migrated. Cancel single meetings and end-date recurring meetings.
2 – Download the On Demand Migration (ODM) agent	**Windows users only: Follow these instructions** to download the ODM agent to ensure that Office 365 is available to be installed on your PC or laptop.	~3 minutes
Complete on Monday, July 18 at 9:00 AM (your local time)		

Steps/instructions	Important to know	Details
1 – Execute the transition to [redacted] Office 365	**Windows users – Follow these instructions** to install the ODM agent and switch your OneDrive and Teams accounts to [redacted]. **Mac users – Follow these instructions** to create a new Outlook profile, which will prompt you to connect to [redacted] Office 365.	~5 minutes
2 – Update your Outlook Profile	As part of this migration, your [redacted] email account will become your primary account, and your [redacted] emails will be forwarded there. **Windows users** – No action. The ODM agent will create new Outlook profile and assist with OneDrive. **Mac users** – Log in to Outlook after creating a new mail profile. (See step 1 – Execute the transition to [redacted] Office 365.)	~5 minutes
3 – Update your Microsoft Teams profile	[redacted] Microsoft Teams is now your primary tenant. **Windows users** – To update your Teams profile, you need to log in with your [redacted] credentials. **Mac users** – Log in to Outlook after creating a new mail profile. (See step 1 – Execute the transition to [redacted] Office 365.)	~3 minutes
4 – Update your O365 account	**Windows users** – No action. The ODM agent will update your Office 365 account to [redacted] Office 365. **Mac users** – Log in to O365 after creating a new mail profile. (See step 1 – Execute the	~2 minutes

	transition to [redacted] Office 365.)	
5 – Update your OneDrive account	If you are currently using OneDrive, to continue synching your files, update [redacted] OneDrive. **Windows users** – No actions. The ODM agent will create new Outlook and OneDrive profiles. **Mac users** – Log in to OneDrive after creating a new mail profile. (See step 1 – Execute the transition to [redacted] Office 365.)	~5 minutes
6 – Update your [redacted] calendar	• Re-create your recurring meetings from your [redacted] account now that you've migrated. • Re-invite conference rooms to meetings. *Conference room names will be changed in Office 365 – see information below.	If you are an attendee of a recurring meeting, **contact the Organizer** and ask them to delete your [redacted] email address from the invite and reinvite you using your [redacted] email address post-migration.

7 – Update your mobile device to access [redacted] data	If you would like to access [redacted] systems and data (including email) on your phone, you must:
	
	• **Enroll in [redacted] Intune** (mobile device management tool)
	  ○ **Apple device**
	  ○ **Android device**
		~5 minutes

Please note

If you need assistance, please submit a ticket in OnePortal by clicking the "Click here to open an Incident" link under the Fix IT section and completing the short form. Once submitted, a customer service representative will reach out to you.

Please be aware that moving this amount of data takes time – you may see a delay in all of your data being accessible. If you notice that you don't have some emails, calendar items or Teams channels, it may be due to this delay.

Other updates

- **Conference rooms**
    - Conference room names will be changed in [redacted] global address (GAL) list in Outlook. See new conference room names and email addresses **here**.
    - For help with scheduling a conference room in Outlook, watch **this video**.
- **PC distribution** will begin later this year.
- **File sharing** will be available later this year.
- See the **FAQ** for updated information.

Upcoming training

- OnePortal / Office 365 training:
    - **Thursday, July 14** | 11:00 pm ET (APAC) (this is **Friday, July 15** India IST 8:30 am, Australia EST 1:00 pm)
    - You will receive invitations from [redacted] IT integration ([redacted])
- Microsoft Teams training will be available after July 18.
    - You will receive invitations from [redacted] IT integration ([redacted])

Contents

(Initial Communication via TechNotes – sending Jan 27 week)

2020 Cost Roll in Progress

Standard Cost Roll is scheduled for the weekend of **Feb 21-23, 2020.** The cost roll is a yearly process conducted jointly by Finance and IT to ensure that our 2020 standard costs are aligned with our manufacturing plan. This process gets conducted globally at the end of Period 2, and involves taking down [redacted] and other key systems that include finance information worldwide to update the cost information.
What does this mean to you?

- Period End Close activities will complete on Friday Feb 21, 2020, including sales order entry. [redacted] will be taken offline after the business confirms processing is complete for the day.
- [redacted] will not be accessible from Feb 21 at (targeting) 9:30 PM until Monday Feb 24 at 1:00 AM.
- Downstream reporting applications ([redacted]) will experience a delay in reporting availability as the new costs replicate through the systems.

Communications are being sent to specific groups whose work is affected beyond what is listed above. Global communications including emails, Snapcomms, and digital signs will begin shortly to remind everyone of this process.

(TechPortal Information – posting Jan 27 week)

Name: 2020 Cost Roll in Progress
Title: 2020 Cost Roll in Progress
From/To:
Summary: [redacted], [redacted], [redacted], Reporting Offline for Yearly Financial Maintenance Feb 21-23. Click here to see more information.
Type: Widget
Display first: yes

(To [redacted]/Operations – sending Jan 27 week)

Standard Cost Roll is scheduled for the weekend of **Feb 21-23, 2020.** The cost roll is a yearly process conducted jointly by Finance and IT to ensure that our 2020 standard costs are aligned with our manufacturing plan. This process gets conducted globally at the end of Period 2 to be effective on Day 1 of Period 3 and involves taking down [redacted], as well as other key finance systems worldwide to systematically update this cost information.

What does this mean to you?

- Period End Close activities will be moved up by two days with close activities starting Friday Feb 21, 2020, after the business confirms processing is complete for the day.
- At the conclusion of closing activities for Period 2, Cost Roll activities will commence.
- [redacted] **will not be accessible from Feb 21 at (targeting) 9:30 PM until Monday Feb 24 at 1:00 AM.**
- **Friday, February 21 at (targeting) 9:30 PM CST – [redacted] shutdown**
- February 22 and 23 – [redacted]/Hubs need to use manual process to ship emergency orders over the weekend
- Downstream reporting applications ([redacted]) will also experience a delay in reporting availability as the new costs replicate through the systems.
- Global communications including emails, Snapcomms, and digital signs will begin shortly so your key business contacts should be aware of this schedule as well.

For further information please contact [redacted] at [redacted].

Activities	[redacted]	[redacted]	[redacted]
UAT Mock Period End job testing for [redacted]	Friday, Feb 14 at 5PM	--	--
Freeze Item Master in systems globally	Friday, Feb 14 at 5PM	Saturday, Feb 15 at 12AM (Midnight)	Saturday, Feb 15 at 10AM
All Sales Activities (POs, Order Entry, etc) for Period End Complete	Friday, Feb 21 at 7PM	Saturday, Feb 22 at 2AM	Saturday, Feb 22 at 12PM
[redacted] Systems Outage for Cost Roll	Friday, Feb 21 at end of shipping (targeting 9:30PM)	Saturday, Feb 22 at 4:30AM	Saturday, Feb 22 at 2:30PM
[redacted] Systems Available	Monday, Feb 24 at 1AM	Monday, Feb 24 at 8AM	Monday, Feb 24 at 5AM
[redacted] systems updated	--	Monday, Feb 24 at 10AM	Monday, Feb 24 at 10AM
Downstream data refreshed ([redacted]) for Cost Roll	Tuesday, Feb 25 at 9AM	Tuesday, Feb 25 at 7AM	Tuesday, Feb 25 at 5PM

(To [redacted] Finance & Operations – sending Jan 27 week)

Hi [redacted] –

We are finalizing the plan for this year's Cost Roll and wanted to make you aware of the schedule – please see the information below.

[redacted] are available for [redacted] starting on Monday, February 24 at 5:00 AM AEDT (Feb 23 Noon CST), but [redacted] will not be fully open for inter-company transactions until February 24 at 6:00 PM [redacted] (Feb 24 1:00 AM CST). Performing inter-company transactions prior to 6:00 PM [redacted] will cause inaccurate timing of data between Period 2 and Period 3.

If you have any questions, please contact me or [redacted] at [redacted].

****

Standard Cost Roll is scheduled for the weekend of **Feb 21-23, 2020.** The cost roll is a yearly process conducted jointly by Finance and IT to ensure that our 2020 standard costs are aligned with our manufacturing plan. This process gets conducted globally at the end of Period 2 to be effective on Day 1 of Period 3 and involves taking down [redacted], as well as other key finance systems worldwide to systematically update this cost information.

What does this mean to you?

- Period End Close activities will be moved up by two days with close activities starting Friday Feb 21, 2020, after the business confirms processing is complete for the day.
- At the conclusion of closing activities for Period 2, Cost Roll activities will commence.
- [redacted] **will not be accessible from Feb 21 at (targeting) 9:30 PM until Monday Feb 24 at 1:00 AM.**
- **Friday, February 21 at (targeting) 9:30 PM CST –** [redacted] **shutdown**
- February 22 and 23 – [redacted]/Hubs need to use manual process to ship emergency orders over the weekend
- Downstream reporting applications ([redacted]) will also experience a delay in reporting availability as the new costs replicate through the systems.
- Global communications including emails, Snapcomms, and digital signs will begin shortly so your key business contacts should be aware of this schedule as well.

For further information please contact [redacted] at [redacted].

Activities	[redacted]	[redacted]	[redacted]
UAT Mock Period End job testing for [redacted]	Friday, Feb 14 at 5PM	--	--

Freeze Item Master in systems globally	Friday, Feb 14 at 5PM	Saturday, Feb 15 at 12AM (Midnight)	Saturday, Feb 15 at 10AM
All Sales Activities (POs, Order Entry, etc) for Period End Complete	Friday, Feb 21 at 7PM	Saturday, Feb 22 at 2AM	Saturday, Feb 22 at 12PM
[redacted] Outage for Cost Roll	Friday, Feb 21 at end of shipping (targeting 9:30PM)	Saturday, Feb 22 at 4:30AM	Saturday, Feb 22 at 2:30PM
[redacted] Available	Monday, Feb 24 at 1AM	Monday, Feb 24 at 8AM	Monday, Feb 24 at 5AM
[redacted] updated	--	Monday, Feb 24 at 10AM	Monday, Feb 24 at 10AM
Downstream data refreshed ([redacted]) for Cost Roll	Tuesday, Feb 25 at 9AM	Tuesday, Feb 25 at 7AM	Tuesday, Feb 25 at 5PM

(To IT Employees & IT Contractors – sending Jan 27 week)

Standard Cost Roll is scheduled for the weekend of **Feb 21-23, 2020.** The cost roll is a yearly process conducted jointly by Finance and IT to ensure that our 2020 standard costs are aligned with our manufacturing plan. This process gets conducted globally at the end of Period 2 to be effective on Day 1 of Period 3 and involves taking down [redacted], as well as other key finance systems worldwide to systematically update this cost information.

What does this mean to you?

- Period End Close activities will be moved up by two days with close activities starting Friday Feb 21, 2020, after the business confirms processing is complete for the day.
- At the conclusion of closing activities for Period 2, Cost Roll activities will commence.
- [redacted] **will not be accessible from Feb 21 at (targeting) 9:30 PM until Monday Feb 24 at 1:00 AM. Downstream reporting applications ([redacted]) will experience a delay in reporting availability as the new costs replicate through the systems.**
- Global communications including emails, Snapcomms, and digital signs will begin shortly so your key business contacts should be aware of this schedule as well.

For further information please contact [redacted] at [redacted].

Activities	[redacted]	[redacted]	[redacted]
UAT Mock Period End job testing for [redacted]	Friday, Feb 14 at 5PM	--	--
Freeze Item Master in systems globally	Friday, Feb 14 at 5PM	Saturday, Feb 15 at 12AM (Midnight)	Saturday, Feb 15 at 10AM
All Sales Activities (POs, Order Entry, etc) for Period End Complete	Friday, Feb 21 at 7PM	Saturday, Feb 22 at 2AM	Saturday, Feb 22 at 12PM
[redacted] Outage for Cost Roll	Friday, Feb 21 at end of shipping (targeting 9:30PM)	Saturday, Feb 22 at 4:30AM	Saturday, Feb 22 at 2:30PM
[redacted] Available	Monday, Feb 24 at 1AM	Monday, Feb 24 at 8AM	Monday, Feb 24 at 5AM
[redacted] systems updated	--	Monday, Feb 24 at 10AM	Monday, Feb 24 at 10AM
Downstream data refreshed ([redacted].) for Cost Roll	Tuesday, Feb 25 at 9AM	Tuesday, Feb 25 at 7AM	Tuesday, Feb 25 at 5PM

(To [redacted] DLs – sending Jan 27 week)

*DL-[redacted]-Users
*DL-[redacted]-Users
*DL-[redacted]-Users
*DL-[redacted]-Users

Subject: IMPORTANT: Item Master Freeze (Feb 14 to Feb 23)

*****PLEASE FORWARD TO ANYONE ON YOUR TEAMS THAT MAY BE IMPACTED.*****

On February 14th, EOD CST, we will be systematically freezing the Item Master file globally [redacted] in preparation for the Cost Roll. The item master freeze will impact the following:

1) No new [redacted] will be updated in the [redacted] during the period of Feb 14 to Feb 23.
2) No updates will be made [redacted] during the period of Feb 14 through Feb 23.
3) [redacted] may be updated in the [redacted] during the item Master Freeze, if required.

Please ensure that any new items or changes to items are provided to [redacted] at least one week (by Feb 7) prior to the Item Master Freeze to ensure that item are appropriately updated in the systems prior to the Item Master Freeze and do not impact day-to-day business.

If you still have the ability to update the [redacted] in any of the [redacted], please refrain from making changes during this time.

If you have any questions, please feel free to contact [redacted] or [redacted]. Thank you.

(To [redacted] DLs – send reminder Feb 12)

(To [redacted] DLs – send reminder mid-day day-of, Feb 14)

Portal Announcement:

Name: 2020 Cost Roll – [redacted]
Title: 2020 Cost Roll – [redacted]
From/To: February 12-15
Summary: On February 14th, EOD CST, we will be systematically freezing the [redacted] globally in [redacted] in preparation for the Cost Roll, through February 23.
Type: Widget, Banner
Display first: yes

(To [redacted] – sending Jan 27 week)

Please note the following changes to close processing for the Period 2 Close:

- The period 2 will end at **7:00 PM CST on Friday, February 21**. All [redacted] not submitted by this time will not be included in February numbers. ([redacted] will be down so [redacted] will not be able to assist in late entry.)
- [redacted] will be down all weekend, which will have impact on downstream impacted systems such as [redacted].
- Currently, we anticipate that February final sales data will be available in [redacted] reports at these times:
  [redacted]: Tuesday, Feb 25 at 9:00 AM
  [redacted]: Tuesday, Feb 25 at 7:00 AM
  [redacted]: Tuesday, Feb 25 at 5:00 PM

Please plan accordingly. We will continue communications throughout this process to inform you as systems update and become available.

(To [redacted] – send reminder Feb 19 and Feb 21)

Cost Roll Global Communications

EMAIL 1: Week of February 3, 2020

From: [redacted] Announcements
To: All Global (DL)
Subject: [redacted] Offline for Yearly Financial Maintenance Feb 21-23

[redacted] **will go offline for financial maintenance after the completion of** [redacted] **on Friday, February 21.** User access will be unavailable to these systems from close of business Friday evening, February 21 through Sunday evening, February 23. A global notification will be distributed once the systems are available.
[redacted] will be online but will only include [redacted] as of Friday, February 21 until the reporting update is complete on Tuesday, February 25 at 9am Central.
We will notify you once [redacted] are fully updated.
Additional information for non-US locations:
If planned updates indicated below are made during business hours, please refrain from updating orders or processing invoices during this time to avoid inaccurate transactions:

Location	System	Update Plan
[redacted]	[redacted]	Updated transfer prices will be updated on Monday, February 25 by 10:00 AM local time
[redacted]	[redacted]	Updated transfer prices will be updated on Monday, February 25 by 10:00 AM local time
[redacted]	[redacted]	Updated transfer prices & standard cost will be updated by EOD Sunday, February 24
[redacted]	[redacted]	Updated transfer prices will be updated by end of day Sunday, February 24
[redacted]	[redacted]	Updated transfer prices will be updated on Monday, February 25 by 12 noon local time (users will be locked out of the system during updates)

For more information call one of the numbers listed below, or email [redacted].

- **Internal:** Dial [redacted]
- **Global:** +1 [redacted]
- [redacted]**:** +[redacted]
- [redacted]**:** +[redacted]

Portal Announcement:

Name: 2020 Cost Roll
Title: 2020 Cost Roll – [redacted] Outage Reminder
From/To: February 14-25
Summary: [redacted] will go offline for financial maintenance after completion of [redacted] Friday, February 21 through Sunday evening, February 23.

Type: Widget, Banner
Display first: yes

EMAIL 1/Reminder: February 20, 2020

From: [redacted] Announcements
To: All Global (DL)
Subject: REMINDER: [redacted] Offline for Yearly Financial Maintenance Feb 21-23
(Send as a forward of Email 1 with the following text.)

[redacted] **will go offline for financial maintenance after the completion of** [redacted] **on Friday, February 21.** User access to these systems will be unavailable from close of business Friday evening, February 21 through Sunday evening, February 23. A global notification will be distributed once the systems are available.
[redacted] will be online but will only include [redacted] as of Friday, February 21 until the reporting update is complete on Tuesday, February 25 at 9:00 AM CST. We will notify you once [redacted] are fully updated.
Additional information for non-US locations:
If planned updates indicated below are made during business hours, please refrain from updating orders or processing invoices during this time to avoid inaccurate transactions:

Location	System	Update Plan
[redacted]	[redacted]	Updated transfer prices will be updated on Monday, February 25 by 10:00 AM local time
[redacted]	[redacted]	Updated transfer prices will be updated on Monday, February 25 by 10:00 AM local time
[redacted]	[redacted]	Updated transfer prices & standard cost will be updated by EOD Sunday, February 24
[redacted]	[redacted]	Updated transfer prices will be updated by end of day Sunday, February 24
[redacted]	[redacted]	Updated transfer prices will be updated on Monday, February 25 by 12 noon local time (users will be locked out of the system during updates)

For more information call one of the numbers listed below, or email [redacted].

- **Internal:** Dial [redacted]
- **Global:** +1 [redacted]
- [redacted]: +[redacted]
- [redacted]: +[redacted]

Snapcomm: Friday, February 21, 2020

Name: 2020 Cost Roll – [redacted] Outage Reminder

Content:

Don't Forget!
[redacted] **will go offline** for financial maintenance after the completion of the [redacted] on Friday, February 21 through Sunday, February 23.
[redacted] will be online but will only include [redacted] as of Friday, February 21 until the reporting update is complete on Tuesday, February 25 at 9:00 AM CST.

You will receive notification once the systems are available and when [redacted] are fully updated.

EMAIL 2: Sunday, February 23, 12:00 PM CST

From: [redacted] Announcements
To: [redacted] (*All [redacted] DL)
Subject: [redacted] Available - Yearly Financial Maintenance Complete, Systems Available
(Send as a forward of Email 1 with the following text.)

[redacted] **are back online** after completion of yearly financial maintenance, **but** [redacted] **will not be fully open for inter-company transactions until February 24 at 6:00 PM** [redacted] (Feb 24 1:00 AM [redacted]).
For more information call one of the numbers listed below, or email [redacted].

- **Internal:** Dial [redacted]
- **Global:** +1 [redacted]
- [redacted]**:** +[redacted]
- [redacted]**:** +[redacted]

EMAIL 3: Monday, February 24, 1:00 AM CST

From: [redacted] Announcements
To: All Global (DL)
Subject: [redacted] Available - Yearly Financial Maintenance Complete, Systems Available
(Send as a forward of Email 1 with the following text.)

[redacted] **are back online** after completion of yearly financial maintenance.
[redacted] **will be back online by 2:00 AM CST.**

For more information call one of the numbers listed below, or email [redacted].

- **Internal:** Dial 4444
- **Global:** +1 [redacted]
- [redacted]**:** +[redacted]
- [redacted]**:** +[redacted]

EMAIL 3/Text to [redacted]: Monday, February 24, 1:00 AM CST

Please forward to [redacted]:
[redacted] **are back online** after completion of yearly financial maintenance.
[redacted] **will be back online by 2:00 AM CST.**

EMAIL 4: Tuesday, February 25, 12:00 AM CST

From: [redacted] Announcements
To: [redacted]
Subject: [redacted] Reporting Available - Yearly Financial Maintenance Complete
(Send as a forward of Email 1 with the following text.)
Downstream [redacted] reporting (such as [redacted]) is now available after completion of yearly financial maintenance.
For more information call one of the numbers listed below, or email [redacted].

- **Internal:** Dial 4444
- **Global:** +1 [redacted]
- [redacted]: +[redacted]
- [redacted]: +[redacted]

EMAIL 5: Tuesday, February 25, 9:00 AM CST

From: [redacted] Announcements
To: [redacted]
Subject: [redacted] Reporting Available - Yearly Financial Maintenance Complete
(Send as a forward of Email 1 with the following text.)
[redacted] **reporting (such as [redacted]) is now available** after completion of yearly financial maintenance.
For more information call one of the numbers listed below, or email [redacted].

- **Internal:** Dial 4444
- **Global:** +1 [redacted]
- [redacted]: +[redacted]
- [redacted]: +[redacted]

EMAIL 5/Text to [redacted]: Tuesday, February 25, 9:00 AM CST

Please forward to [redacted] via text:
[redacted] **reporting (such as [redacted]) is now available** after completion of yearly financial maintenance.

Snapcomm: Tuesday, February 25, 10:00 AM CST

[redacted] **reporting (such as [redacted]) is now available** after completion of yearly financial maintenance. **And the 2020 Cost Roll is complete!**

For more information call one of the numbers listed below, or email [redacted].

- **Internal:** Dial 4444
- **Global:** +1 [redacted]
- [redacted]: +[redacted]
- [redacted]: +[redacted]

PROPOSALS

Content management **Strategy**

February 2024

IT content management approach

Strategy: Provide a repository for final, approved documents that can be leveraged for various IT-specific needs

Benefits

- Establish governance for reusing content
- Provide consistent, accurate approved content in a centralized location
- Enable more efficient use of content across IT
- Streamline communication with leadership
- Source of truth for fully approved slides
- Manage access to content/IT sites

Core team

Elizabeth Alley, lead

[redacted]

Partners and potential content

- **IT Communications team** – Core and foundational program one-pagers; ITLM content; CIO Town Halls; CIO presentations; functional reviews; CCI content; EUS information; comms plans; AI guidance
- **Development** – Training presentations/ videos/ scripts; culture
- **OCM** – Steerco presentations; OCM plans; leadership slides
- **IT Strategy** – Quarterly IT report card; regional/ functional strategy reports; annual strategy
- **Enterprise Enablement** – Portfolio updates; M&A
- **Continuous Improvement** – IT Operating Model
- **IT Function leaders** – Town halls; demographics
- **IT Business Partners** – Talking points; one-pagers/ slides
- **HR** – Pulse/ Q12; CAR

In-progress work and partner engagement

- ✓ Research use of SharePoint

- ✓ Outline use of content management system/ document repository
  - ✓ Digital asset library in SharePoint
  - ✓ Specific permissions for users (established but not enabled)
    - Owners – full control – IT Comms
    - Members of each document library can edit
    - Visitors – read/ download – N/A
  - ✓ Establish system/ process for use
    - How to organize folders for easy retrieval
    - Who can upload, who can remove
    - Consistent naming conventions

- Kick-off meetings
  - Core team/ partners with access
  - IT Business Partners
  - Function leaders

- Comms/ training plan (one-pagers)

Next steps

February

- Finalize build of SharePoint site
- Test site
- Review

March

- Kick-off meetings with partners
- Execute comms plan
- Launch site

April

- Soft launch with IT Business Partners
- Execute comms plan

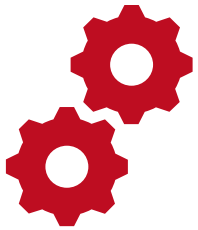
Artemis

OCM planning

Artemis impact on users

End users

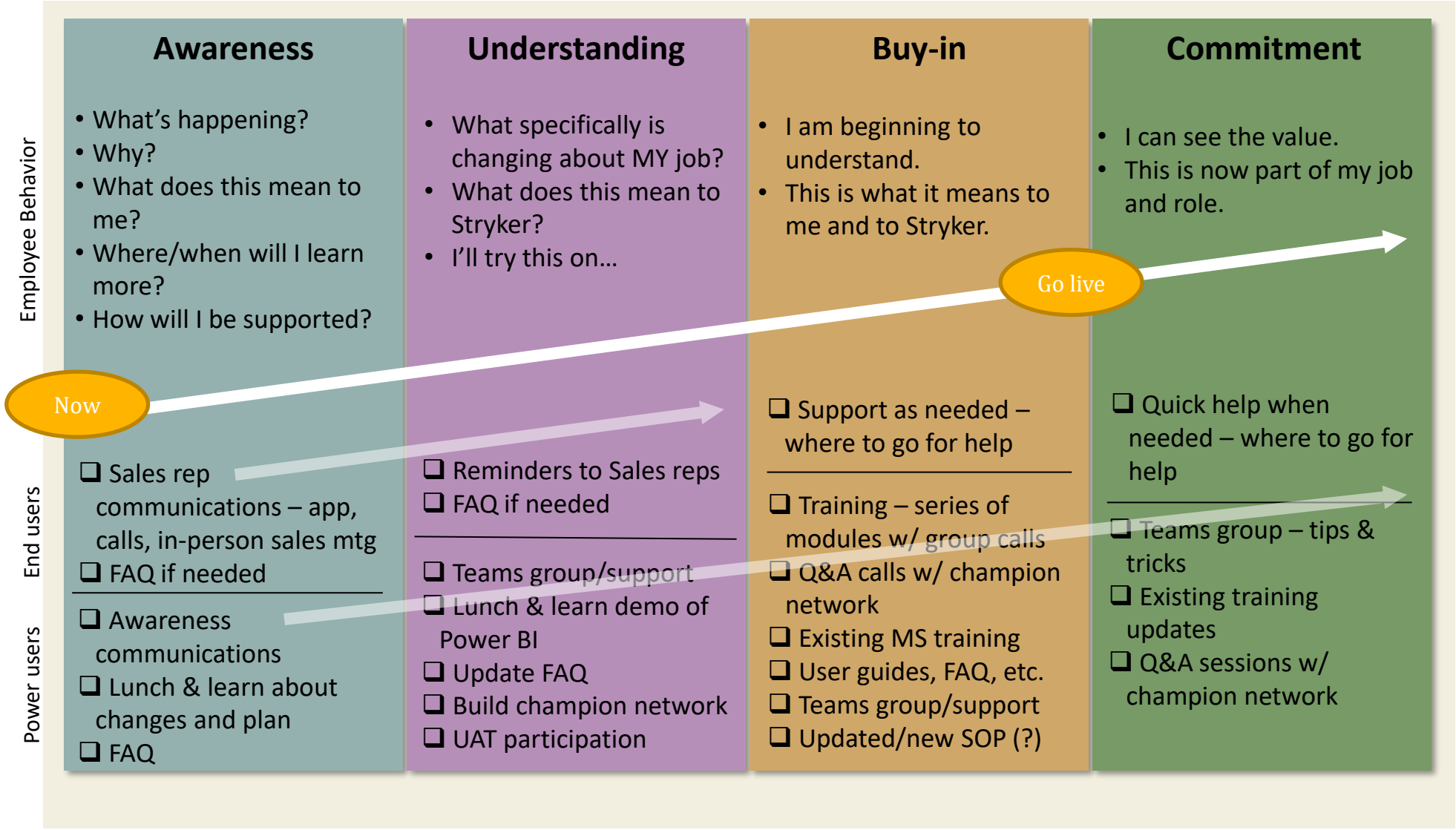
- Phase 1: sales reps, field operations, Stryker leadership
- Phase 2: Manufacturing
- Updated reports
- Some new Power BI users
- Reports guaranteed by SLA
- [redacted] & [redacted] data combined in reports



Power Users

- Phase 1: sales ops, marketing
- Phase 2: manufacturing, finance, inventory
- Assess all current reports
- Learn new system - Power BI
- Recreate reports in Power BI
- No manual merging with new system
- [redacted] & [redacted] data available

Moving users up the change curve



Organizational Change Management Strategy

[redacted]

Provide a base of learning and support options to build awareness and ensure buy-in from impacted users.

Build awareness with all users

- Communicate directly to users
- Work to find all impacted users

Create individual understanding in power user groups

- Create and support understanding through a variety of learning options:
  - Active learning through UAT, demos, training, Q&A calls
  - Self-paced learning through FAQ, user guide, SOP
  - Support through Teams and champions

Ensure buy-in from power users

- Continue support and ongoing learning:
  - Teams support and tips & tricks
  - Updates on Power BI upgrades and training
  - Periodic Q&A sessions with champions

	May	June	July	August	September	October
Phase 1 – sales end users				• Work with sales ops to get info to sales reps via app, calls, etc • FAQ available	• Go-live phase 1 • Direct line to help	
Phase 1 – sales power users	• Get to know product, issues, users & champions • Draft FAQ & communications	• Awareness communications with FAQ • Lunch & learn about changes and plan • Survey / identify more users • Conduct impact assessments with champions • Users assess current reports	• Lunch & learn demo of Power BI • Invite to join Teams group • Build champion network • Create training modules • Identify existing MS training	• Launch training • Q&A calls with champions • User guides, FAQ, new SOP available • Participate in UAT • Users recreate reports	• Go-live phase 1 • Tips & tricks, training updates for Teams group • Ongoing Q&A sessions	• Continued tips & tricks for Teams group
Phase 2 – non-sales end users					• Emails – info only • FAQ available	• Go-live phase 2 • Technical support as needed
Phase 2 – non-sales power users			• Awareness communications with FAQ • Lunch & learn about changes and plan • Survey / identify more users • Conduct impact assessments with champions • Users assess current reports	• Lunch & learn demo of Power BI • Invite to join Teams group	• Training modules available • Q&A calls with champion network • User guides, FAQ, new SOP available • Participate in UAT • Users recreate reports	• Go-live phase 2 • Tips & tricks, training updates for Teams group • Ongoing Q&A sessions • *Nov – continued tips & tricks for Teams group*

ITSC with help from:

Core project team

Business partners

Champions

Power users