ITSM Implementation BRD

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Platform: ServiceNow ITSM

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1. Project Overview

The ITSM Implementation project introduces ServiceNow as the standardized IT Service Management platform for the organization. It streamlines and unifies processes for Incident Management, Change Management, and Knowledge Management, ensuring consistent operations, faster resolutions, and improved visibility across IT departments.

This implementation supports end users, service desk teams, change managers, and knowledge managers by providing a centralized system with lifecycle workflows, reporting capabilities, and integrated communication. It also includes pre- and post-implementation adoption support, documentation, and training to ensure smooth transition and long-term usability.

The implementation includes configuring system settings, defining ITIL-aligned processes, building user roles and security groups, enabling notifications, and equipping the organization with training materials, guides, and knowledge content.

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2. Business Requirements

The following functional requirements define the expected behavior of the ITSM processes. Below are structured business requirements for Incident, Change, and Knowledge Management.

BR1: Centralized Incident Management

Description: The system must provide a unified and consistent workflow for logging, triaging, assigning, and resolving incidents.
Requirements:

• Users must be able to submit incidents through ServiceNow.
• System must support categorization, subcategories, and priority values.
• Incidents must auto-route to assignment groups based on rules.
• Agents must have access to lifecycle states (New, In Progress, On Hold, Resolved, Closed).
• Incidents must support comments, work notes, attachments, and related records.

BR2: Controlled Change Management

Description: The system must support a structured, auditable Change Management process to reduce risk and prevent service disruptions.
Requirements:
• Users must be able to submit Standard, Normal, and Emergency change requests.
• Change forms must include risk, impact, affected CIs, schedule, and plans.
• Approval workflows must include manager approval, CAB approval, and emergency approvals.
• Change records must update through defined lifecycle states.
• Changes must be visible on the Change Calendar.

BR3: Knowledge Management Enablement

Description: The system must support a full publishing workflow for creating, reviewing, approving, and publishing knowledge articles.
Requirements:
• Articles must support lifecycle states (Draft, Review, Published, Retired).
• Knowledge Base must support categories, search filters, and tags.
• Agents must link incidents to relevant knowledge content.
• Permissions must control who may draft, edit, and approve content.

BR4: Platform Configuration & Standardization

Description: The system must reflect company standards and maintain process consistency.
Requirements:
• Configure system branding, company logo, color themes, time zone, and formats.
• Implement standardized categories, priorities, SLAs, and assignment groups.
• Ensure naming conventions and workflows are consistent across departments.

BR5: Notifications & Communications

Description: The system must send automated notifications for key events in the ITSM lifecycle.

Requirements:

• Email notifications must trigger for incident creation, assignment, comments, resolution, and change approvals.

• Inbound emails must be able to create or update records.

• Notification messages must be standardized and easily maintainable.

BR6: Reporting, Metrics & SLAs

Description: The system must provide visibility into IT operations through dashboards and performance analytics.

Requirements:

• SLA timers must apply based on priority.

• Dashboards must show incident volumes, backlog, SLA breaches, changes, and knowledge usage.

• Reports must be filterable by department, group, category, and timeframe.

BR7: Roles, Groups & Security

Description: Ensure the system supports proper access control.

Requirements:

• Roles must be configured for end users, agents, managers, change approvers, knowledge authors, and admins.

• Sensitive fields must only be visible to appropriate roles.

• Groups must be aligned with assignment and approval workflows.

BR8: Adoption, Training & Documentation

Description: Users must receive the necessary support to effectively adopt the new ITSM processes.

Requirements:

• Provide training materials (user guides, process documentation, how-to content).

• Provide role-based training for agents, managers, and admins.
• Offer post-implementation support and feedback mechanisms.

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3. Use Cases

The following use cases describe how users interact with the ITSM system.

UC1: Submit an Incident

Primary Actor: End User
Preconditions:
• User has access to ServiceNow.

Main Flow:

1. User navigates to the Incident module or portal.
2. User enters required details (description, category, contact info).
3. System validates the information.
4. Incident is created and assigned to an appropriate group.
5. User receives a confirmation notification.

Postconditions:
• Incident appears in the assigned group's queue.
• User can view ticket status in their portal.

UC2: Work & Resolve an Incident

Primary Actor: IT Support Agent
Preconditions:
• Incident is assigned to the agent or their group.

Main Flow:

1. Agent opens the incident record.
2. Agent reviews details and updates work notes.

3. Agent links a knowledge article if used.
4. Agent resolves incident with a resolution code.
5. User receives a resolution notification.

Postconditions:
• Incident moves to Resolved/Closed status.

UC3: Submit a Change Request

Primary Actor: Change Requester
Preconditions:
• User is authorized to submit a change.

Main Flow:

1. User opens the Change module.
2. User selects change type.
3. User completes all required fields.
4. System routes change for approval.

Postconditions:
• Change appears on Change Calendar.

UC4: Publish a Knowledge Article

Primary Actor: Knowledge Author
Preconditions:
• Author has permissions.

Main Flow:

1. Author drafts the article.
2. Article is routed for review.
3. Reviewer approves or rejects with feedback.
4. Approved article is published.

Postconditions:
• Article is searchable in the Knowledge Base.

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4. User Stories

The user stories describe the needs of different roles within the ITSM process.

• As an end user, I want to submit incidents easily so that I can quickly get support from IT.
• As a support agent, I want all incidents centralized so that I can work efficiently and meet SLAs.
• As a change requester, I want to submit structured change requests so that risk and impact are clearly understood.
• As a change manager, I want a change calendar so that I can prevent conflicting changes.
• As a service desk agent, I want access to a knowledge base so that I can resolve issues faster.
• As a knowledge manager, I want to approve content so that only accurate, reviewed articles are published.
• As an IT manager, I want dashboards and SLAs so that I can monitor team performance.
• As an admin, I want correct roles and permissions so that users have appropriate access.
• As a project sponsor, I want training and documentation so that adoption is successful.