Streamlined EBS System Incident Communication Process

Overview

This process is a streamlined revision of previous processes used to communicate with affected users when a system incident occurs in the City's SAP system. *Note:* a "system incident" is different from a "business process change". System incidents are communicated by the EBS team. Business Process Changes are communicated by the Business Process Owners or by us, if delegated.

Definitions

Incident (System Incident / System Problem): Any event within the SAP system which impacts the use of SAP for end users; which is not related to user error due to improper input or lack of training.

Communicable Incident: Any system problem which affects more than an individual user constitutes an incident which should be communicated to potentially affected users.

Communication Priority / Scope of Impact			
Level 1	**Level 2**	**Level 3**	**Level 4**
All Employees	**All SAP Users**	**Some or All SAP Users – Non-Urgent**	**Few SAP Users**
• Immediate / Pending Impact • Major System Disruption • E.G.: Payroll is affected.	• Immediate / Pending Impact • Major System Disruption • E.G. SAP Down, ESS Down, CityLearner Down, etc.	• Non-urgent impact to some or all SAP users. • E.G. An issue was discovered in report or on a timesheet but users will not need that functionality for several days.	• Usually Module-specific. • E.G. a specific transaction is not performing as it should.
1st Comm. Timing:	**1st Comm. Timing:**	**1st Comm. Timing:**	**1st Comm. Timing:**
1 Hour of incident report	1 Hour of incident report	Within 24 hours of incident report.	As determined by EBS leadership.

Incident Communication Workflow (in Outline Form):

I.   **Incident is Discovered / Identified / Reported**
II. **EBS Team Member (anyone on team) Prioritizes Problem**
  a. Level 1, 2, 3, or 4;
  b. Use SAP Incident Report template; fill in details (noted in Appendix A);
  c. Send to Distribution List: <u>EBS Incident Communication Leads</u>
III. **EBS Incident Communication Leads Evaluate & Communicate**
  a. Distribution List as of 8/16 (EBS Incident Communication Leads):
      i.   Charlie Dudley, Training & Communications
      ii. Cindy Delozier, FILO Lead
      iii. Kate Schmidt, HCM Lead
      iv. Diana Allen, Technical Manager
      v.   Wesly Smith, Technical Lead
      vi. Cc: Satish Nath
          1. Charlie will send most communications for EBS incidents;
          2. In the event of an absence (unplanned) another lead will take the role of communicating the incident out and notify the other leads they are doing so;
          3. In the event of a planned absence, Charlie or whomever is designated in his absence will pass communication responsibility to another lead member on the distribution list.
          4. A Citywide message can be sent by Charlie Dudley (in other words he has network rights to send to Citywide), but permission to do so must be obtained from the EBS Manager, Satish Nath. In his absence, permission must be obtained from one of the team leads for FILO, HCM, or Technical or the EBS Manager's delegate.
          5. In the event a Citywide message must be sent and Charlie is absent, the Communication Lead will contact for transmission:
              a. Jen Clodius, Management Analyst, OMF
              b. Elyse Rosenberg, TBC Manager, BTS
              c. Kelly Ball, Principal Management Analyst, OMF
              d. Nelson Zenzano, Help Desk Manager, BTS
                  i. If a BTS contact is utilized, Once the message has been crafted and approved, send the email to the HelpDesk (btshelpdesk@portlandoregon.gov) with the Subject line: Request to send City-wide email.
                  ii. If the situation is urgent, call HelpDesk2 and ask them to expedite the request. You will also need to

ask HelpDesk to add you to the distribution group that is allowed to send City-wide email; you will be removed once you have sent email or the situation has been resolved. Once you have received approval from the HelpDesk, send the message to the following distribution group: Citywide All Employees Distribution Group. In addition, the following parameters need to be observed:

    iii. Message cannot contain pictures or screenshots

    iv. Message cannot be larger than 30 kb

    v. Message cannot contain colored font or background images

    vi. City-wide messages must have approval of the EBS Support Manager, or delegate

b. Evaluate

    i. Communication Leads confirm team prioritization;

    ii. Add any comments, edits, recommended points for communication (this must be done quickly or comm will be sent without input);

    iii. If Business Process Owners or other stakeholders' input is needed, this is the time to solicit their input and notify them of the problem before the public communication goes out;

    iv. Communication Lead charged with transmitting message composes it using EBS Incident Communication template (noted below in Appendix B) making sure to note the Priority Level.

    v. Be sure to copy other relevant City staff who may not fall within the impacted users but should know: Help Desk, OMF Mgmt., etc.

c. Communicate

    i. Use SAP Incident Communication Template (noted in Appendix B);

d. Frequency

    i. An initial communication notifying users of the problem and a resolution email shall always be generated for any problem.

    ii. Incidents which are resolved before a communication is sent, will have a resolution message transmitted notifying users that the problem has been resolved.

    iii. Level 1 & Level 2 incidents should be communicated, at least, once every 24 hours until resolved. (Frequency may be more depending on significance of incident.)

    iv. Level 3 & Level 4 incidents should be communicated once every 48 hours until resolved.

    v.

Appendix A: SAP Incident Report

SAP Incident Report

WHAT:
What Problem Was Discovered / Identified / Reported?

WHEN:
Date, Time Problem Was Reported:

IMPACT:
List System(s) – e.g. All of SAP, ESS, etc.
List affected users, groups, e.g. Citywide, All AP Users, etc.

System Affected:

Users Affected:

COMMUNICATION PRIORITY (LEVEL):
Based on the Users Affected, what Level should this communication be?

Level 1	Level 2	Level 3	Level 4
All Employees - Citywide	All SAP Users	Some or All SAP Users – Non-Urgent	Few SAP Users

Level is:

ETA TO RESOLUTION:

Is there an estimated time to restoration of service? There should be in most cases; and remember this is an estimate.

RELATED CHERWELL TICKET #:
Was this reported via Cherwell OR has a "parent" Cherwell ticket been created for all calls that come into the HelpDesk?

Summary of Problem
Describe the issue, when it occurred, and any other important information:

Next Steps
Is there anything affected customers should know or do?

SEND THIS REPORT TO THIS DISTRIBUTION LIST:
EBS Incident Communication Leads

Appendix B: SAP Incident Communications Template

SAP Incident Notification

WHAT:
Summary Statement (Headline Form) of the
Problem Being Experienced

IMPACT:
System Affected: (List System – e.g. SAP, MM…)
Users Affected: (List affected users, groups)

ETA TO RESOLUTION:
(Is there an estimated time to restoration of
service? There should be in most cases; and
remember this is an estimate.)

Summary of Problem

EBS is notifying you that there (is/was) a (problem) with (affected system).
This issue has/has not) been resolved.

(Alternatively: The issue is currently being researched by the (team working
on the problem).)

[Describe the issue, when it occurred, and any other important information.
]

Next Steps

[Is there anything affected customers should know or do?]

Additional Questions?

Contact:
Charlie Dudley, EBS Training & Communications
x 5-8475

[or put in the name of the Communication Lead if not Charlie or other contact as necessary]