

MaestroRS - Disaster Recovery Project: CBT Analysis and Design

Purpose

ServiceNow is adding MaestroRS to its environment to allow for better disaster recovery planning, mitigation, and response regarding Eversource’s technical environment. This includes storage facilities, data, and hardware. This application is new to Eversource users and requires training and post-launch support.

This document addresses the computer-based training (CBT) aspect of the plan. This training is in concert with instructor-led training (ILT), any resulting guides (quick reference and user), and any follow-up user support. These modules are prerequisites to the virtual session.

Scope

The scope of this project is limited to CBTs and any related references. It focuses on MaestroRS for the roles defined and their tasks. It does not cover ServiceNow tasks unless it is required to complete a task in MaestroRS. The CBTs are assigned modules in Learning Central and reference materials available in SharePoint.

It does not include instructor-led training.

Subject Matter Experts / Approval

Subject Matter Experts (SME):

- TBD

Approvers:

- Analysis & Design:
- Storyboard:
- Alpha:
- Beta:
- Gold:

Key Stakeholders:

TBD

Sign-Off Authority:

- Analysis & Design:
- Storyboard:
- Alpha:
- Beta:
- Gold:

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Communication Plan

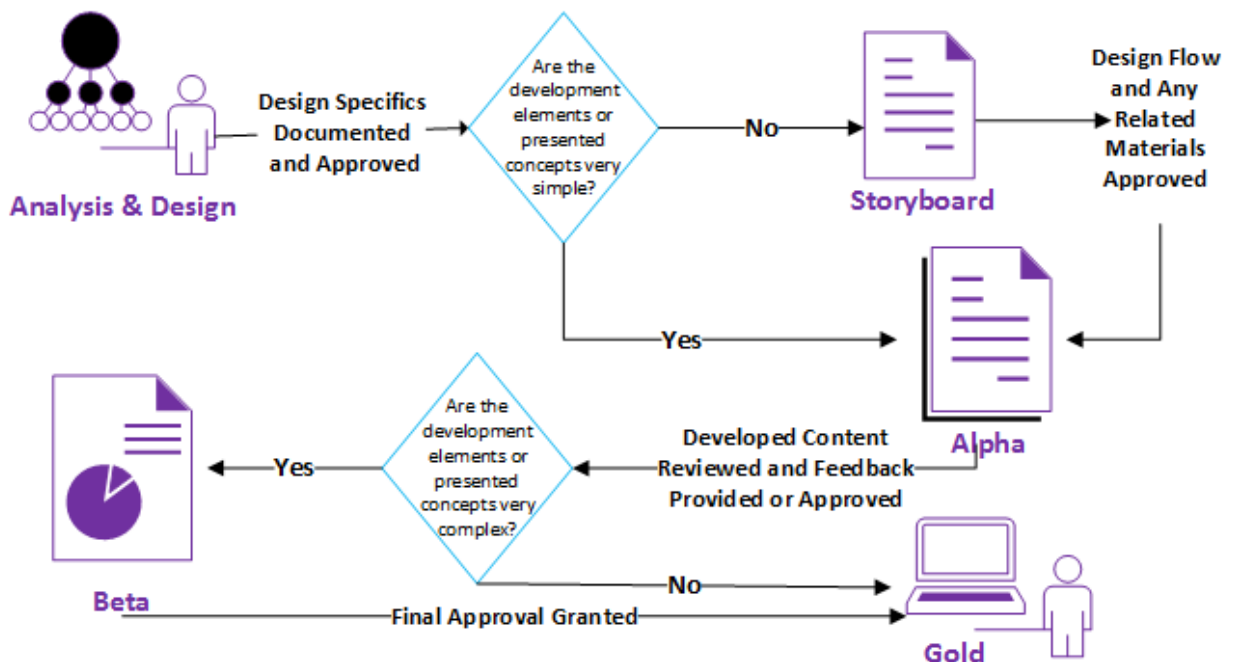
This communication plan is designed to keep all parties informed of the project status and request approvals, as needed. It is expected that all communications go through email.

Purpose	Audience	Frequency
Notify of CBT deliverable ready for review (A&D doc, storyboard, alpha, beta, gold)	SMEs, as needed	Stage completion
Notify of CBT deliverable ready for approval (A&D doc, storyboard, alpha, beta, gold)	Approvers, as appropriate	SME signoff – each stage
Notice of Gold publication (in LMS and SharePoint)	All involved stakeholders	At Gold approval and publication

Development Process

The following image depicts the CBT development process. Narration is recorded for the *Beta* stage. The script requires scrutiny when presented in *Alpha* to eliminate audio pickups.

Intellectual Property Development Process



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Audience

Audiences are role based:

- Everyone (training includes all needed training for *View Only* group)
- SN Admin & MaestroRS Admin (tasks performed by both)
- SN Admin – Only (topics not addressed for MaestroRS Admin)
- Builder – Specific (creates run books and applications)
- Approver – Specific (Director level approval) *QRG Only*

MaestroRS Security Matrix

FairchildApp Security	SN Admin				MaestroRS Admin				Builder				Approver				Viewer			
	Create	Read	Write	Delete	Create	Read	Write	Delete	Create	Read	Write	Delete	Create	Read	Write	Delete	Create	Read	Write	Delete
BIAs																				
BIA - Participant	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
BIA - Non-participant	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Plans																				
Plan - Participant	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Plan - Non-participant	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Elements (Global)																				
Element	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Element Dependencies	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Elements (Specific)																				
Application	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Contract	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Customer	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Employee	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Groups	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Hardware	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Location	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Non-Standard Resource	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Process	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Recovery Task	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Recovery Workstation	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Reps	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Team	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Telecom	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Vendor	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Vital Record	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Misc.																				
Reports	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Homepages	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Setup & Configuration																				
BIA Settings	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Plan Settings	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
REM Settings	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Element Settings	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Data Sync Configuration	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Data Sync Scheduled Jobs	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Fields & Forms	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Users	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Groups	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Roles	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Data Imports	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*

Assumptions

- Users are familiar with the general user interface, since it mirrors ServiceNow
- Users are all new to the MaestroRS interface and processes
- Users are expected to have limited resistance to acceptance or training
- Users are required to participate in ILT
- Users are required to complete specific CBTs as per assigned in Learning Central
- Some users have experience with tabletop exercises but level of experience with full drills and/or Incident Command are not known
- Not all users have headphones, or privacy, to listen to narrated modules, so screen tips and CC is included

Assessment Strategy

The assessment strategy is remedial only. Each module includes a short set of questions. Each question provides immediate feedback. Either *Correct*, or *Not Quite Try Again*, and given the answer after the second try.

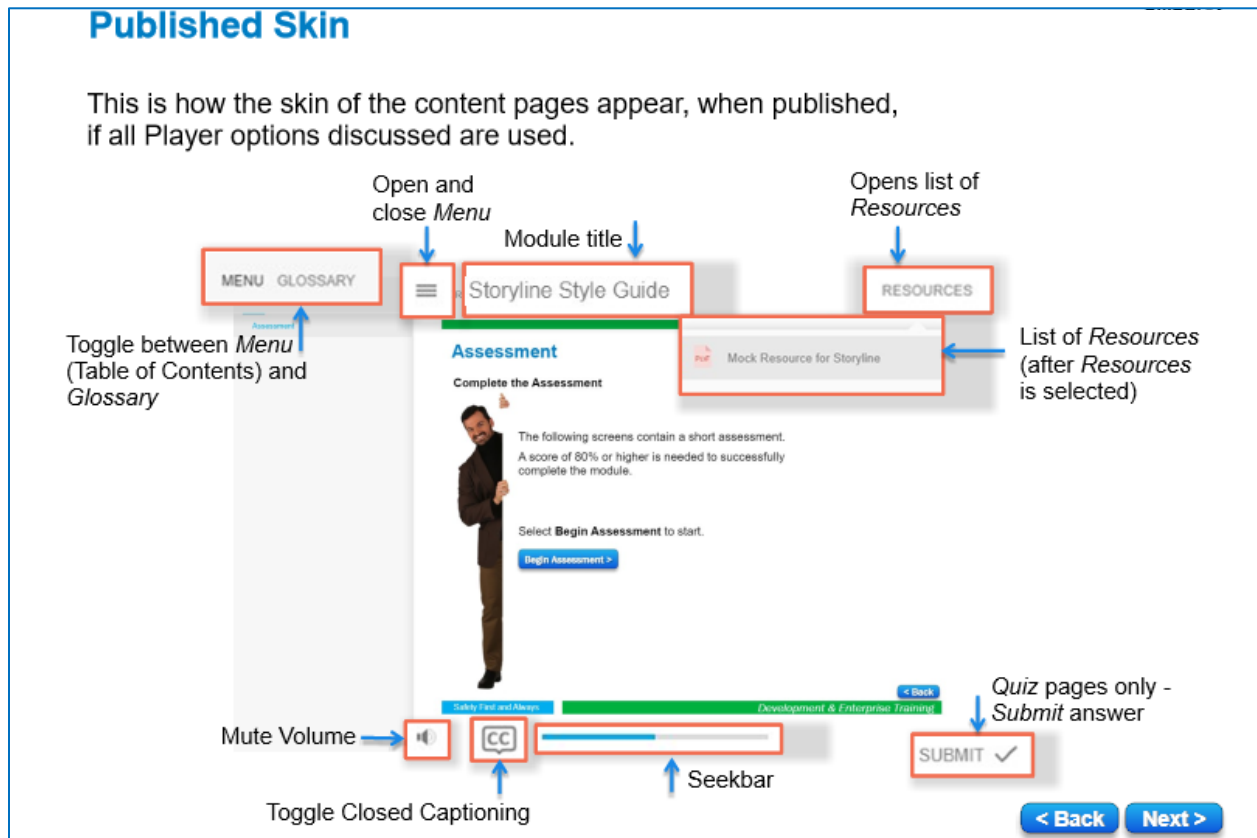
No knowledge checks, within the content flow, are expected at this time. These questions are needed to fully define how the modules are presented (see *Module Design* below).

- Users do not need to pass an assessment to complete a module or access the system
- Users receive immediate feedback on each assessment question
- Modules, of 40 minutes or less, are accessed through Learning Central, published in SCORM and/or AICC

Modules, combining any LMS modules, published and stored, so a page in SharePoint can link to them as references, along with any resulting QRGs (site administered by Rachel Ives): [Need to determine how to present published storyline materials in SharePoint](#)

Module Design

The modules, created using Storyline, combine text, narration, and motion capture to explain and demonstrate the tasks performed in MaestroRS. They follow the user interface defined in the *Storyline Style Guide* and associated templates.



There are *two locations/purposes* for content presentation:

1. Learning Central: Smaller modules, each for one role / one major topic (*less than 40 minutes* in length) – assigned and accessed through *Learning Central*
2. SharePoint: Learning modules, published to *Learning Central*, are combined into a larger version, as logically grouped per role and use the *Table of Contents* to link to the different topics – each link renders the separate module as a separate *chapter*
[Need to determine how to present published storyline materials in SharePoint](#)

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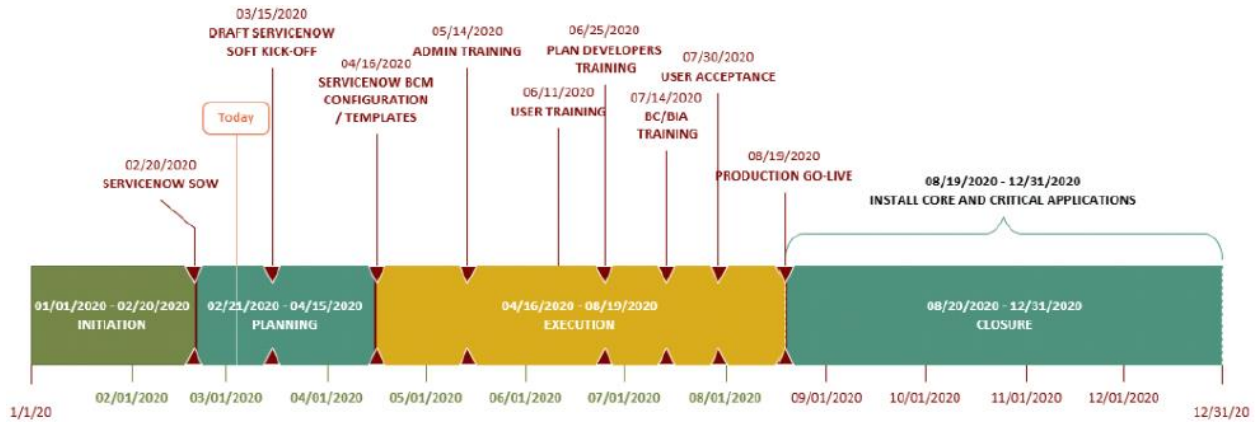
CBT Development Schedule

The CBT development schedule:

- CBT design and development begins after gaining access to the MaestroRS sandbox and receiving *Train-the-Trainer Facilitation Guides* or attending the training.

The *vendor-driven* schedule depicts *Train-the-Trainer* dates:

- Vendor-driven Admin Training - mid May
- Vendor-driven Plan Developer training – late June
- Vendor-driven BC/NIA training - mid July



Preliminary Module and Topic Recommendations

All Roles

1. *Meet MaestroRS* (View Only level)
General Intro to MaestroRS and Connection to Service Now
All roles required to complete a general information module. This is the only required module for Viewers.
 - Logging in (MaestroRS Sample Orientation – p6)
 - Basic Navigation (MaestroRS Sample Orientation – p6)
 - Define and Locate:
 - BIAs
 - Plans
 - Elements (Global and Specific)
 - Reports
 - Homepages
2. *Possible Additional Module* if Content for #1 is too large or broad

SN Admin and MaestroRS Admin

1. *Managing BIAs:*
 - Locating, Creating, Editing, Deleting
2. *Managing Plans:*
 - Locating, Creating, Editing, Deleting
3. *Managing Elements:*
 - Locating, Creating, Editing, Deleting
 - Setup and Configure
4. *Managing Data Sync:*
 - Locating, Creating, Editing, Deleting
 - Configuration
 - Scheduled Jobs
5. *Creating and Managing Exercises:*
 - Developing and tracking live exercises
 - Incident Command roles and forms (ICS_Forms_508_12-7-10.pdf)

SN Admin Only

1. *Working with Reports:*
 - Locating, Creating, Editing, Deleting
2. *Managing Homepages:*
 - Locating, Creating, Editing, Deleting
 -
3. *Completing Additional Setup and Configuration:*
 - Locating, Creating, Editing, Deleting
 - Fields & Forms
 - Users

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- Groups
 - Roles
 - Data Imports
4. *Recovery Exercise Management (REM) tasks:*
- Coordinate and manage complete recovery of plans, elements, and tasks at both a strategic and tactical level
 - Outage Based Recovery
 - Element Based Recovery
 - Plan Based Recovery

Builder – Specific

1. *Managing BIAs:*
 - Locating, Creating, Editing
2. *Managing Plans:*
 - Locating, Creating, Editing
3. *Managing Elements:*
 - Locating, Creating, Editing, Deleting

Approver – Specific

Approvals are shown on one screen and represent the approvals the logged in user needs to track and approve. The screen is the home screen and the approval of all elements can be accomplished in one module. Due to the simplicity, only a Quick Reference Guide (QRG) is required.

Viewer – Specific

1. *N/A* – only General Introduction for All Roles

Preliminary Module Outline Recommendations

All Roles

1. *Meet MaestroRS* (View Only level)

General Intro to MaestroRS and Connection to ServiceNow

All roles required to complete a general information module. This is the only required module for *Viewer Only* users.

- Introduction
 - Reason for implementing MaestroRS
 - What MaestroRS does (ServiceNow MaestroRS Admin Guide – p7)
 - Integrates with ServiceNow to become *Service Now Business Continuity Management (BCM)*
 - How MaestroRS integrates with ServiceNow (high-level) (ServiceNow MaestroRS Admin Guide – p7)
 - Provides additional capabilities and features within ServiceNow for viewing and updating data beyond capabilities in the existing ServiceNow
 - Leveraging ServiceNow data (MaestroRS Sample Orientation – p11)
- Overview of Module
 - This module discusses:
 - Accessing MaestroRS
 - Locating the different area in MaestroRS
- Logging in (MaestroRS Sample Orientation – p6)
 - Log in using the ServiceNow **username** and **password**
- Basic Navigation (MaestroRS Sample Orientation – p6)
 - In the filter search area, enter **Business Continuity**
 - Click **Home**
 - The *Admin and User Dashboard* opens
 - Make *Home* a *Favorite* for quick access later
 - Click the **star** icon next to *Home* in the navigation pane
 - Your Activities
 - Expand the **My Activities** in the navigation pane to view all activities assigned to you
- Define and Locate:
 - BIAs (MaestroRS Sample Orientation – p31)
 - Definition of a *Business Impact Analysis (BIA)*
 - Accessing existing BIA ----
 - Parts of a BIA
 - Questions – customizable
 - Ranges - time frames in which survey recipients will gauge impacts to the organization, for example, *0-4 hours* or *24-48 hours*
 - Ratings - describe the level of impact that can be expected within a range of time, for example, *moderate* or *high*

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- Recovery Times - values that result from the completion of a BIA survey. In other words, they are the possible Recovery Time Objectives (RTO) that can be assigned as a result of the survey responses
 - Elements (Global and Specific)
 - Overview (MaestroRS Sample Orientation – p9)
 - Elements are the physical and logical artifacts that make up business processes, technology, resources, people, locations, vendors, or anything else that supports a Business Continuity or Disaster Recovery program.
 - Default Element Classes (resource) (MaestroRS Sample Orientation – p10)
 - Accessing Primary and Supporting Elements (MaestroRS Sample Orientation – p9,10)
 - Scroll down the navigation menu to *Primary Elements* under Maestro. If needed, click the **arrow** to expand the list.
 - Scroll down the navigation menu to *Supporting Elements* under Maestro. If needed, click the **arrow** to expand the list.
 - Plans
 - A plan is created by a system administrator, and access to build the plan is provided to end users through MaestroRS security. (MaestroRS Sample Orientation – p18)
 - Parts of a Plan include: (MaestroRS Sample Orientation – p18 - 30)
 - PDF View
 - Plan Details (approver, owner, contributor, etc.)
 - Plan Summary (assumptions, purpose, scope, objective)
 - Elements
 - Reports (ServiceNow MaestroRS Admin Guide p98)
 - Running a Report:
 - Click **My Reports** at top of *ServiceNow BCM* page
 - Locate the **desired report**
 - Click **View Report**
 - Viewable sections of reports include:
 - TBD
 - Homepages TBD
2. Possible Additional Module if Content for #1 is too large or broad

SN Admin and MaestroRS Admin

1. *Managing BIAs:*
 - Introduction
 - Background information
 - Overview of Module

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- This module discusses...
- Locating, Creating, Editing, Deleting
 - Setup and Configure
 - Create New BIA (MaestroRS Sample Orientation – p33)
 - Add Questions to a BIA (MaestroRS Sample Orientation – p34)
 - Adding Ranges to the BIA (MaestroRS Sample Orientation – p36)
 - Adding RTOs to the BIA (MaestroRS Sample Orientation – p38)
 - Adjusting Question Settings (MaestroRS Sample Orientation – p39)
 - Adjusting Question Weighting (MaestroRS Sample Orientation – p40)
 - The Score Column (MaestroRS Sample Orientation – p40)
 - Range Order (MaestroRS Sample Orientation – p41)
 - Rating Values (MaestroRS Sample Orientation – p42)
 - Tiers – Adjusting the Tire for BIA Questions (MaestroRS Sample Orientation – p43)
 - Minimum Score (MaestroRS Sample Orientation – p44)
 - Refreshing (Duplicating) a BIA (MaestroRS Sample Orientation – p45)
 - BIA Details Buttons (MaestroRS Sample Orientation – p46)
 - Approval & Rejection Comments (MaestroRS Sample Orientation – p47)
 - BIA Security (ServiceNow MaestroRS Admin Guide v6 – p79)
- 2. *Managing Plans:*
 - Introduction
 - Background information
 - Overview of Module
 - This module discusses...
 - Locating, Creating, Editing, Deleting
 - Setup and Configure
 - Build a new plan (MaestroRS Sample Orientation – p19)
 - Duplicate Plans and Plan Templates (MaestroRS Sample Orientation – p20)
 - Create a Plan Summary Section and Assign it (MaestroRS Sample Orientation – p22)
 - Plan Cover Page image (MaestroRS Sample Orientation – p26)
 - Plan Security (MaestroRS Sample Orientation – p27)
 -
- 3. *Managing Elements*
 - Introduction
 - Background information
 - Overview of Module
 - This module discusses...
 - Element Dependencies (MaestroRS Sample Orientation – pa 11-13)
 - Locating, Creating, Editing, Deleting
 - Setup and Configure
 - Assigning Elements (MaestroRS Sample Orientation – p25)
- 4. *Managing Data Sync:*
 - Introduction (MaestroRS Sample Orientation – p11)

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- MaestroRS sync settings creates linked Elements according to a regular schedule and to be filtered using custom criteria. The syncs can be individually activated and managed as desired. Data Sources consist of the following components:
 - *Data Sources* – configure the ServiceNow source table and filter conditions, MaestroRS destination table, associated Data Script, and Scheduled Job
 - *Data Scripts* – template script logic that determines field data to copy over, active/inactive status validation
 - *Scheduled Jobs* – actual code executed to sync data, updated from associated *Data Script*
 - Overview of Module
 - This module discusses:
 - TBD
 - Locating, Creating, Editing, Deleting
 - Configuration
 - Scheduled Jobs
5. *Creating and Managing Exercises:*
- Introduction
 - Background information
 - Overview of Module
 - This module discusses...
 - Developing and tracking exercises ([Drills also?](#))
 - Incident Command roles and forms (ICS_Forms_508_12-7-10.pdf)

SN Admin Only

1. *Managing Reports:*
 - Introduction
 - Background information
 - Overview of Module
 - This module discusses...
 - Locating, Creating, Editing, Deleting
2. *Managing Homepages:*
 - Introduction
 - Background information
 - Overview of Module
 - This module discusses...
 - Locating, Creating, Editing, Deleting
 -
3. *Completing Additional Setup and Configuration (FOR RECOVERY TASKS?):*
 - Introduction
 - Background information
 - Overview of Module
 - This module discusses...
 - Locating, Creating, Editing, Deleting

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- Fields & Forms
 - Users
 - Groups
 - Roles
 - Data Imports
4. *Recovery Exercise Management (REM) Tasks:*
- Introduction
 - Background information
 - Overview of Module
 - This module discusses...
 - Coordinate and manage complete recovery of plans, elements, and tasks at both a strategic and tactical level
 - Outage Based Recovery
 - Element Based Recovery
 - Plan Based Recovery

Builder – Specific

1. *Managing BIAs:*
- Introduction
 - Background information
 - Overview of Module
 - This module discusses...
 - Locating, Creating, Editing
2. *Managing Plans:*
- Introduction
 - Background information
 - Overview of Module
 - This module discusses...
 - Locating, Creating, Editing
3. *Managing Elements*
- Introduction
 - Background information
 - Overview of Module
 - This module discusses...
 - Locating, Creating, Editing, Deleting

Approver – Specific

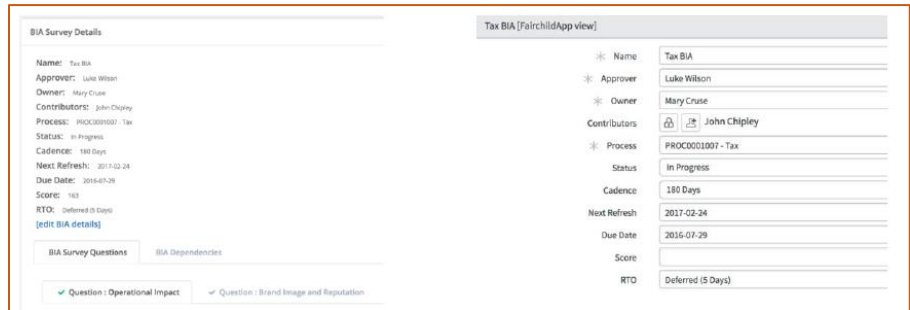
Managing Your Approvals: Quick Reference Guide

Approvals are shown on one screen and represent the approvals the logged in user needs to track and approve. The screen is the home screen and the approval of all elements can be accomplished in one module. Due to the simplicity, only a Quick Reference Guide (QRG) is required.

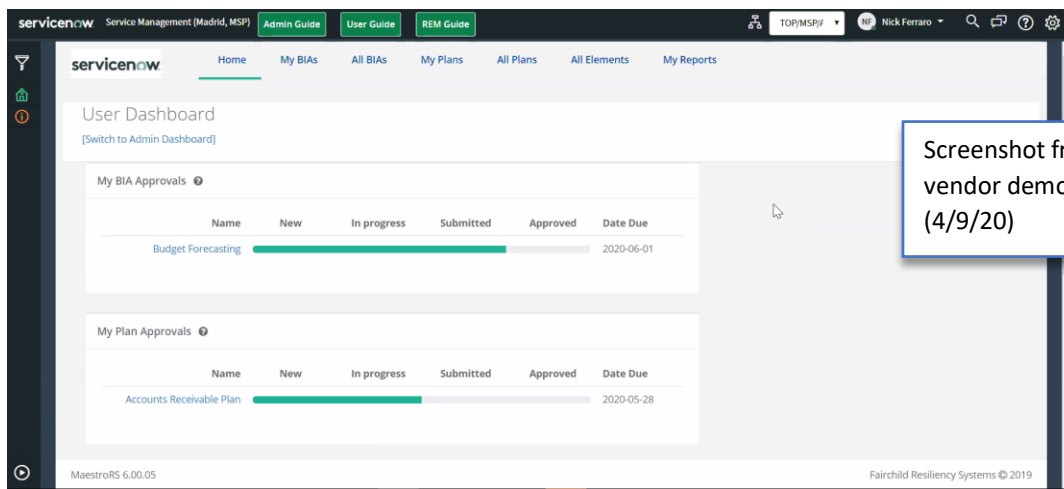
1. Locating, Approving, and Rejecting BIAs and Plans
- Introduction

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- Background information
 - FairchildApp view Approval & Rejection Comments (MaestroRS Sample Orientation – p48)



- Overview of Module
 - This module discusses...
- Plan Actions (MaestroRS Sample Orientation – p27)
- Approval & Rejection Comments (MaestroRS Sample Orientation – p47)



Viewer – Specific

1. N/A – only General Introduction for *All Roles*