Ohio DAS
Department of Administrative Services
Office of Information Technology

State of Ohio Private Cloud
Engaging Hardware and Operating System Support

May 01, 2014

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1 Procedure for engaging hardware and operating system support

This procedure is for engaging vendor support. This can be hardware or operating system support.

1.1 Action or event that requires the procedure

The document defines how to engage hardware and software vendor support. This procedure can be invoked when working on the following events:

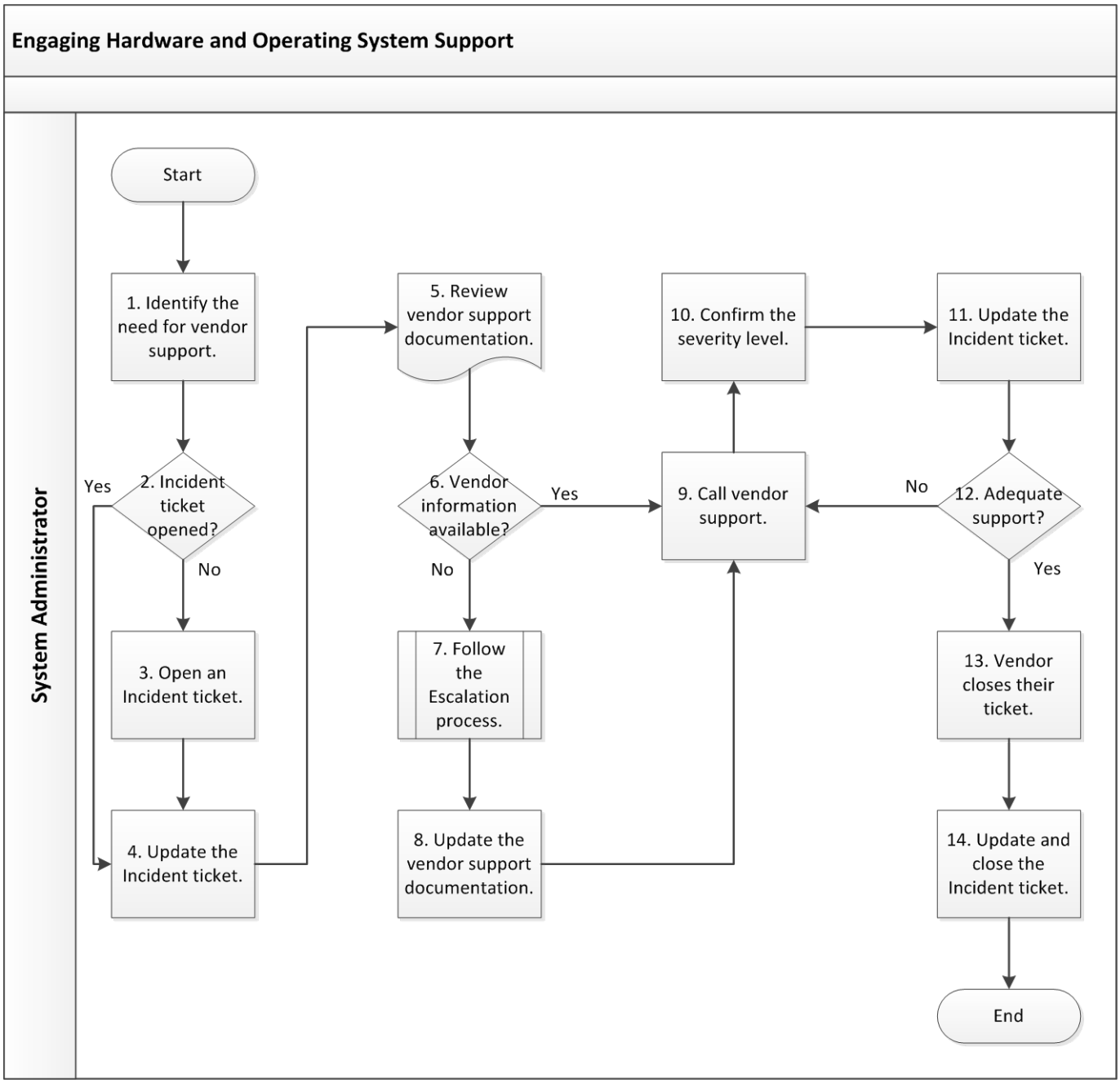
- Critical outage situation
- Incident Management ticket
- Resolving a compatibility issue between the operating system and applications
- Planning a major upgrade
- Planning a major operating system rollout
- Any other situation that requires vendor opinion, approval, and consensus

1.2 Goal of the procedure

At a high level, the goal is to follow a set procedure when engaging vendors for hardware and operating system support.

2 Hardware and operating system support overview

The following flow illustrates support for hardware and operating systems.



3 Flow narrative

The following table describes the steps for engaging support for hardware and operating systems.

Table 1: Engaging Hardware and Operating System Support

Role	Step	
System Administrator	1	• Identify the need for vendor support. **Note:** If a System Administrator (SA) is working on any of the following situations, then the SA might need vendor support. o Critical outage situation o Incident Management ticket o Resolving a compatibility issue between the operating system and applications o Planning a major upgrade o Planning a major operating system rollout o Any other situation that requires vendor opinion, approval and consensus
	2	• Incident ticket opened? Has an Incident ticket already been opened in ServiceNow™? o If no, then go to step 3. o If yes, then go to step 4.
	3	• Open an Incident ticket.
	4	• Update the Incident ticket. The update should include information about the need for vendor support.
	5	• Review vendor support documentation. Standard vendor support documentation should be available for all vendors. Support numbers and OIT support contract numbers should be included in the documentation. In general, vendor support is invoked by calling the vendor's support number and providing a contract number, support agreement number, or hardware serial number. **Note**: Vendor support documents can be found in the share point: https://oitportal.ohio.gov/sites/SDD/EC/Windows/default.aspx

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Role	Step	
	6	• Vendor information available? o If no, then go to step 7. o If yes, then go to step 9.
	7	• Follow the Escalation process. **Note**: Follow the typical escalation process: **Systems Administrator → Team Lead → Manager** and so on to obtain the information needed to open a vendor support ticket.
	8	• Update the vendor support documentation. **Note:** It is critical to update the vendor support documentation to ensure that the documentation is current.
	9	• Call vendor support. Open a ticket with vendor support. Document the issue or issues completely.
	10	• Confirm the severity level. Ensure that the vendor ticket has the correct severity level. **Note:** o Based on the need for support, it is imperative that the severity rating of the vendor's ticket (step 8) is in sync with the Incident ticket opened in ServiceNow (step 3). o This is to ensure the vendor responds in a timely manner based on the need for support.
	11	• Update the Incident ticket. Update the Incident ticket with the vendor ticket information obtained in step 9 and with the estimated response time for the requested support.
	12	• Adequate support? Did the vendor provide the support needed? o If no, then go to step 9. o If yes, then go to step 13.
	13	• Vendor closes their ticket.
	14	• Update and close the Incident ticket. Complete these actions in ServiceNow.