Template
for an
IT Operations Manual
Product Description

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Summary and Scope

This template for an ***IT Operations Manual / IT Systems-Handbook*** will help you

- that no important item is forgotten and
- a common handbook structure is used throughout all systems. This will support easy cross-system troubleshooting and documentation.

The resulting ***Operations Manual / Systems-Handbook*** is an important deliverable of the overall IT system for

- **compliance with documentation-requirements** for systems and processes required by internal QA-department or internal auditing department or external auditors or other organizations and laws

and it is ***an essential source of information to support***

- ***daily operations*** by clearly description of ***all active and proactive tasks*** to keep the system running and prevent unplanned outages and by providing all information required.

> **Put an end to excuses like "I did not know that, I was not aware …"!**

- ***special operations*** e.g. outage planning and all special tasks from shut-down to startup

- ***troubleshooting*** by ensuring that all required information is immediately available. Especially in case of problems this document should contain all information required by internal staff or especially by external experts to analyse the problem

- ***all other active and proactive tasks*** (e.g. Hardware / Software / License upgrades / extensions to cover increasing usage) required to keep the system running within the expected performance limits and prevent unplanned outages (e.g. because of an expired license key or exceeding the license limit)

Audience

Development Manager

This template supports the efficient creation of an Operations Manual which is an important part of the delivery.

Operations Manager

The operations manager should customize this template according to the requirements of his team and afterwards communicate those customized document to the Development Manager.

QA Manager

This template allows the QA Manager to check the Operations Manuals delivered for completeness.

If you think that you don't need this template,

because ...... you have already Operations Handbooks for your Systems ?

- Use this comprehensive template to cross-check if your current Operations Handbooks are complete !... you store all information in an comprehensive Configuration Management Database (CMDB) ?

- Use this comprehensive template to cross-check if your CMDB covers all types of information! ... you outsourced development and you expect the operations and system handbook as part of the delivery

- Use this template in the contract specifications to clearly express what you expect thus to avoid "misunderstanding" between vendor and you about the content of the operations handbook. Using this template for this purpose is much cheaper than solving a single dispute with the vendor. ...it's much work to write the handbook and your systems are running without it

because ...... the system runs even without Operations Manual. One member of your staff has that in his head.

- But the second person (who shares on-call duty with the main person) might know the most important details how to re-start after a crash but might not be aware of all e.g. monthly tasks. And latest at the first hand-over to a new main responsible person, the new person will have to write down everything the former person tells. If the person just knowing it leaves unexpected then all the information must be re-engineered - definitely much more work than the initial documentation. Huge money was spent in the area of "Knowledge Management" - not writing a Systems and Operations Handbook means not even documenting required knowledge, making "Knowledge Management" impossible.

- A comprehensive System- and Operations Handbook is an important part of the Operations / Production Managers "Job Insurance". Without such a documentation he can in case of an audit not proof that all tasks are assigned and checked for execution.

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Deliverables

Immediately after your credit card payment was automated processed you can download following file:

Filename	Size	Description
ophb.zip	450 KB	Zip-file containing all of the following files

Within this ZIP-file you will find following files:

Filename	pages	Description
ophb.pdf	64	Document in Adobe Acrobat format, Acrobat-reader required.
ophb.rtf		Same content, editable RTF-format, can be imported into any word processor.

Purchase

You can purchase online and immediately download at

http://www.it-checklists.com/template_operations_manual_purchase.html

Service – We write your Operations Manual!

The Operations Manual can be delivered in English and German.

Your Situation

You do need an Operations Manual.

Although our Template for an Operations Manual enables you to do it yourself, fast and efficient, **_you don't have even that time._**

Our Vision

Our vision is a systems handbook which not only satisfies every auditor, but is also a major help for your daily and non-daily operations. Our consultants have in addition to experience in application support also excellent writing skills ("Technical Writer") in English and German and are able to compile a systems handbook...

- by providing application support we learn how the system works and fill step by step our Handbook-Template
- by "Knowledge Engineering" - Reading available information and interviewing your application support staff

Our Challenge

Our challenge is to create and deliver your Operations Manual without consuming much of your time.

How we will achieve this:

The Challenge	Our Approach
Save your time	We come prepared to meetings - we carefully study all information you provided us in advance carefully.
Save time of your staff / experts	We don't ask to draw pictures and describe - we have a good guess, draw the pictures and offer descriptions. Your experts just need to select the appropriate statements or add some corrections.
Hunt (research) the missing information	If the required information cannot be found in any existing documents - we don't hesitate to study the design- and development documentation - and your technical staff does not know them, then we will search for it. If you want then we search e.g. for configuration information in config files and database tables - we are experienced conducting "hands on" searches.
Application Interfaces	The main application processes are often well documented in the vendor's manual, but the interfaces with other applications are the real challenge. But you can be sure that we do know how to document the borderline ("Handover Point") between the teams operating the interfacing applications! - Check our **Documentation Template for Application Interfaces** ! (http://www.it-checklists.com/eai_application_interface_checklist.html) *(If you contract us to write your Operations Manual, then you don't need to buy this template - we will use it to increase our efficiency. If you already purchased this document and contract us, then we will discount the price you already paid for the document.)*
The life cycle	Most changes in the application or on in interfacing applications require an update of the Operations Manual. For the case that the check item "Operations Manual updated?" is not already on your "checklist for release to production", then we will motivate you and support you with arguments that it gets added there.

We are different and we work different

We love graphics and tables	Graphics visualizing the data flow through different system processes and interfaces build the core of the handbook. Factual information for all the items in the graphic are presented in tabular form. Free text is just used for explanations and background information.

The Delivery	Just sending the text file is the most simple and most common delivery, but unfortunately storing the file on a shared place (file system, your intranet, your document management system) is too often the last activity of this file. Never accessed again. Often such forgotten, that the operations manual is not even known to new staff or staff filling in during vacation.
	
	Our preferred "Handover" is to conduct together with the Operations Manager and the application support team a "Production Review for Application <x>" Meeting. - Perhaps such review meetings are already conducted quarterly or yearly. In many points of those meetings questions like:
	
	   • "Where is this documented?",
	
	   • "To whom is this task assigned?"
	
	should be asked - and answered by showing the related section in the Operations Handbook.

Products related to this Service:

Template Operations Manual / Operations Handbook	http://www.it-checklists.com/template_operations_manual.html
Documentation Template for Application Interfaces	http://www.it-checklists.com/EAI_application_interface_checklist.html
Checklist for Production Release	http://www.it-checklists.com/production_release_checklist.html

How Mercury Consulting Ltd. can help you

Mercury Consulting Limited (MCL) is a professional consultancy providing experience, support and training in IS/IT operations for companies during high-time-pressure startup phase and following consolidation phase, especially in the Telecom-market.

Our Products

you can purchase online and immediately download
at our eBook-Shop

Our Checklists and Templates will help you to ensure that good or best practice is not only known but consistently applied!

Database Independent Products

Product	Benefit
150 Non functional Requirements.	Requirements Template with 150 non functional requirements for selecting or developing robust, reliable, stable and manageable applications to meet the Service Level Agreements (SLA's). For external RFP's (Request for Proposal) and for internal development.
Checklist for Data Migration	65 important questions to identify and address or exclude typical migration pitfalls in an early phase of the project, thus ensuring the confidence for keeping the time plan.
Template: Systems- and Operations Handbook	Template to establish that documentation auditors like to see!
Interface Checklist	Those questions which you need to ask before starting the development! Requirements, Checklist and Template for Planning, Defining and Documenting Application Interfaces.
Checklist for Production Release and System Handover	Checklist for small and medium projects focusing on non-functional aspects for operations team. Simple but effective!
Business Requirements for Archiving and Purging	Template with Business Requirements for Archiving & Restore & Purging. Not removing old customer data can cause conflicts with privacy laws. ***Business must act*** and clearly specify what to purge and what to archive!
Application Health Check: Stability Assessment	Using this template to check your systems - and DOCUMENT the findings might show you even more potential issues beyond invalid objects.
Backup SLA / OLA	Operations Level Agreement (OLA) for Backup and Recovery
Technology Selection for Disaster Recovery (DR)	Requirements Template to define your requirements for and constraints related to disaster recovery. Decision Template to select the best suitable technology group for disaster recovery.

Oracle Database Specific Products

The author is Oracle Certified Professional (OCP) for 9i and 10g, but the products are not authorized by Oracle.

Product	Benefit
Template for Database Operations Level Agreement (OLA) / SLA	If a Service Level Manager needs to offer to Business a Service Level Agreement (SLA) for an End-to-End IS/IT-Service, he sign this SLA only after he arranged within IS/IT for each system or component used to provide this service an **Operations Level Agreement (OLA)** with the providing team or department.
	This document provides a template for such an Operations Level Agreement (OLA) for Oracle Databases containing the agreed values and for QA-purpose also the measures implemented to reduce the likelihood of violations of those agreed values.
	It does not only deal with availability, but contains also comprehensive service catalogue of advanced DBA services and a template for the Service Level Reporting (SLR).
Database Health Check - Part 1: Stability Assessment	Stability Assessment of your Oracle Database.
	Most Application- and Database-Crashes can be avoided when detecting early indicators and reacting to them.
	Be Proactive - Check Now!
DBA and Application Support: Job Description and Self Assessment	Checklist to ensure that all 60 DBA-duties are assigned:
	System DBA, Development DBA and Application DBA versus Application Support
	If you have just a job role "DBA", but not a dedicated job role "Application DBA" those 19 duties must be explicitly assigned to either "Application Support" or to the "DBA" - otherwise they might not be executed!
	Detect unassigned tasks before an auditor reports them !
	This product addresses disputes between System DBA and Application Support (or, if existing, dedicated Application DBA) regarding the responsibility for the application's database objects.

Our free Whitepapers

http://www.mercury-consulting-ltd.com/wp/whitepapers.html

Whitepaper	Benefit and Description
The Importance of Application Level Monitoring.	Keeping your applications free from invalid objects is an important task, but does not guarantee error free operations. This free whitepaper explains the difference between "Application Level Monitoring" to "Database Monitoring" and "System/Server/OS"-Monitoring.
Important Facts about Redolog- and Archivelog in Oracle Databases for Change Managers and Application Support Staff	Understanding the topic "archivelog volume" can avoid unexpected troubles when applying changes or conducting upgrades. This awareness paper explains why Change Managers must ask questions about the archivelog volume created during changes and upgrades and why application support staff – and not only the DBA - must understand this topic.
The Danger of Invalid Database Objects	An awareness paper for Operations Managers and Application Support describing the problems and potential risks caused by invalid objects in an Oracle Database.
Private or Public Synonyms – or no Synonyms at all ?	A decision support paper visualizing the pro's and contras on a single page in tabular form and evaluating the arguments.

Our Services

http://www.Mercury-Consulting-Ltd.com/services.htm

About the Author

The Author of those white papers and products is an

with 12 years experience as DBA and 6 years experience in Telecommunications Companies.