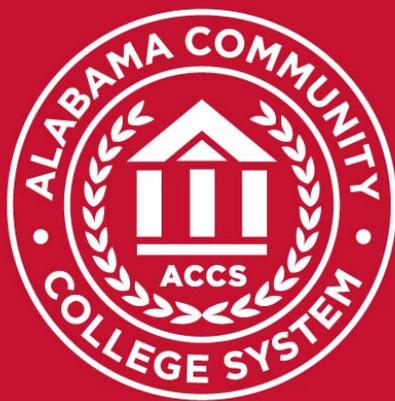ALABAMA COMMUNITY COLLEGE SYSTEM

PROCEDURE MANUAL AND WORKFLOW MANAGEMENT FOR HELPDESK SYSTEM

March 2015

One of the primary function of the IT Division is to provide customer support to the other departments that make up the Department of Postsecondary Education. In an effort to ensure that all issues are handled in a high quality manner and to ensure that all customers are treated equitably, these procedures will outline the responsibilities of the Help Desk technicians and the End Users.

The responsibilities will be clearly defined in separate sections for each user type. A flowchart with specific decision points and expectation of treatment is provided to help understand the procedures for the new system.

HELPDESK PROCEDURES

USER SECTION

- It is the user's responsibility to report issues using the Help Desk system. Users should input tickets using these methods of delivery. The methods, listed by preference would be
    1. The form on the portal @ www.dpe.edu/support. Simply fill the information out on the website and click submit.
    2. The customized Outlook form (not implemented at this time). A custom form built into Outlook designed to input a ticket directly into the system
    3. Email your concern or problem to dpeits@dpe.edu.
    4. A phone call. This should only be used if the other methods are unavailable. This method is generally only available during standard office hours. The phone number to call is 334-293-4545.
- Only one (1) issue or request should be placed in a single ticket. Should multiple needs be required, multiple tickets should be entered into the system.
- When submitting a ticket, more information is better than less information. Each piece of information asked for gives the IT section a better idea of the situation and the possible course of actions available.
- For specific tickets, there should be as much lead-time notice as is possible:
    1. Creation of New Users or Editing of Current Users (including setup of new computers) – 72 hours
    2. Deletion of Users – 24 hours (circumstances permitting)
    3. Phone Changes – 72 hours
    4. A/V Support Request – 48 hours
    5. Data Request – 1 week

    Though this is not a requirement for the request to be fulfilled, it should be noted that by having as much time as requested here will help to ensure the IT staff has adequate time to test any changes to functionality or verification of specific information being used.
- Users should only contact IT staff who have been assigned to their case. The exception to this would be if there is a customer service issue, in which case the Director of Information Technology Services should be contacted.
- Users should not attempt maintenance on any hardware or software unless directed to do so by IT Staff.

- Submitters will receive an email from the helpdesk system when a ticket has been received and appropriately processed. This email will provide the details of the ticket including to whom the ticket has been assigned.
- Should the submitter not be contacted by the assigned worker within the expected amount of time (which is contained in the email), an **escalation will automatically occur** which will send additional automated emails. This will allow IT Staff personnel the opportunity to be reminded of the trouble ticket and its current status.
- The submitter will receive emails regarding any changes to the status of the ticket. Any concerns can be addressed with the IT Staff assigned to the specific ticket.
- When a ticket is closed, a submitter should be informed as to what the problem was, how it was handled, and whether there will be any additional problems.
- A submitter will occasionally be asked to answer a short survey based on their ticket experience. **It is VITAL these surveys be completed when asked. Your help in determining the nature and quality of the services provided will enable IT Staff to continually improve the experiences for each individual involved at DPE.**
- It is the submitter's responsibility to ensure he or she notifies the Director of Information Technology Services if there is an issue with the customer service or support. Any and all concerns are welcome.

IT STAFF COMMITMENTS

- IT Staff commits to act with integrity and honestly. We will tell the user what is happening with their problem.

- IT Staff commits to communicate with the user in terms that they understand.   We will not use technical terms or jargon unless we are sure that the user will understand them. We will explain things to the users as necessary.

- IT Staff commits to help the user identify critical issues and prioritise problems accordingly. See IT Service Level Agreement section.

OPERATING HOURS

The Helpdesk will respond to requests as per the following schedule:

- Standard Operating Hours are 8:00am to 5:00pm Monday through Friday

HELPDESK SYSTEM

- Assignees will receive an email on a new ticket. Based on the Kace priority, each assignee will have a specific timeframe with which to give an initial answer to the submitter of the trouble ticket.
- If any work is done on a ticket, a comment should be made in the Kace for that ticket. This will notify the submitter of any updates.
- Work should be catalogued within the Kace as well. By tracking when and how much work is done on particular tickets may determine what additional resources may need to be used on this issue.
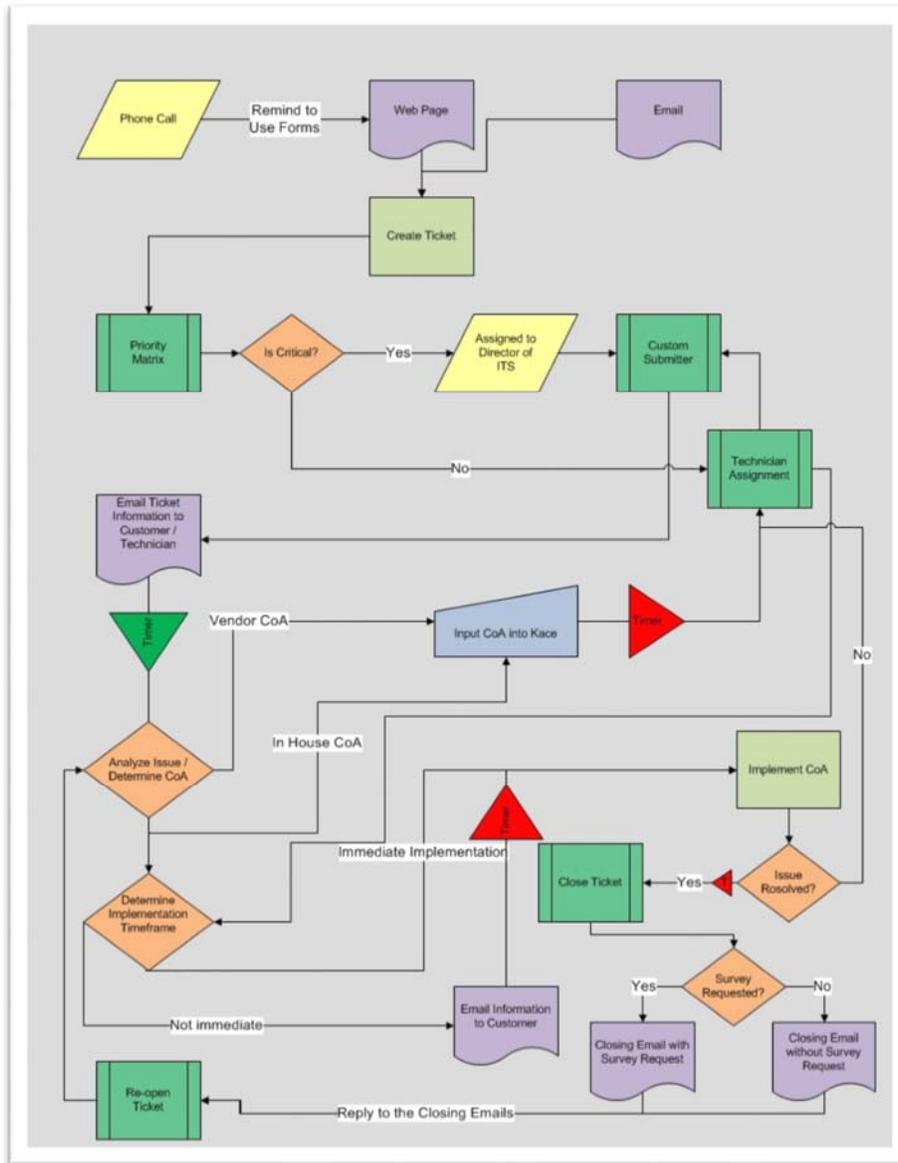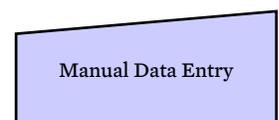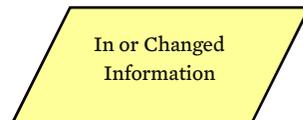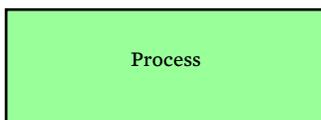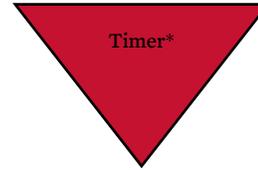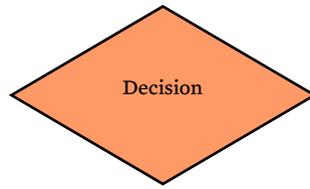
THE FLOWCHART

The flowchart is used to determine courses of action based on specific information within the help desk system. The items within the flowchart are defined by the shapes. Each shape and color designate a different mechanic.

LEGEND

Process – a series of actions or steps taken in order to achieve a particular end

Incoming or Changed Information – Information that is incoming into the system or changed by the system

Documents – pieces of written, printed, or electronic matter that provide information or evidence

Manual Data Entry – Information input into our system by individuals

Automated Process – a process where by human intervention has been reduced to a minimum

Decision –   a conclusion or resolution reached after consideration, whether automated or manual

Timer (Green or Red)* –   Starting (Green) or stopping (Red) of the timing within the help desk system

FLOWCHART ITEMS AND DEFINITIONS (AS NECESSSARY)

Phone Call / Web Page – Initial information requirements to put into new trouble ticket system.

Email* (Not implemented yet) – A Form built for Outlook that will allow a trouble ticket to be input into the new system.

Priority Matrix – An automated process that determines priority of the incident based on several factors.

Custom Submitter – Allows for the IT desk to place a ticket for another user.

Timer – Timers are built into the new helpdesk system. Based on specific circumstances, timers are designed to help with targeted fast responses.

CoA – Course of Action

Kace – The helpdesk system

SPECIAL HELPDESK WORKFLOW INFORMATION

Although the premise of the workflow being used in the Kace should be somewhat apparent, in order to maintain transparency the following information is presented to help limit any questions or concerns.

PRIORITY MATRIX

The priority matrix is a set of parameters taken from data the submitter supplies to formulate the priority for a trouble ticket. This priority can be changed by the assigned personnel should the matrix poorly reflect the

priority. Priorities for a trouble ticket specifically impact who is assigned a ticket and how long they have to work on a ticket before it is escalated.

ESCALATION

Escalation occurs when an amount of time has gone by without an adequate solution to the trouble ticket. This amount of time varies based on the priority of the trouble ticket. It should be noted, however, that while a ticket is in a stalled status (that is, a status that is waiting for special considerations) the time is not increasing.

Once a ticket has lapsed beyond its escalation window, an email is sent out to the submitter and the assigned IT staff member. The timer is then reset, and the priority is raised to the next level.

Priority	Escalation time
Critical	30 minutes
High	1 hour
Medium	4 hours
Normal	24 hours (1 day)
Project / Goal	168 hours (7 days)

CRITICAL

Critical trouble tickets are immediately assigned to the Director of Information Technology Services. In order to fully expedite any critical tickets, the director will maintain a continuous awareness of the situation.

HIGH

High trouble tickets generally affect multiple divisions or more. They have a significant impact on the efficiency of the staff within the ACCS or the colleges supported by the ACCS.

MEDIUM

Medium trouble tickets may affect selected personnel or a division within the ACCS. The have a moderate impact on efficiency, but may have difficult workarounds to allow for continued operations.

NORMAL

Normal trouble tickets tend to affect only a single or very few people. They have a slight impact on efficiency, and generally have an acceptable workaround.

PROJECT / GOAL

Project or goal trouble tickets have no negative impact on current individuals working system. By including this priority into the trouble ticket system, IT Staff hope to capture the concerns and ideas of the ACCS in an effort to promote better working conditions.

COURSE OF ACTION

Course of action (CoA) is determined by one or more IT staff members working together. Courses of action generally fall within two specific methods.

VENDOR COA

Vendor CoA is the method defined when it is necessary to contact an outside source or sources to obtain solutions to a trouble ticket. It should be noted the IT Staff has limited ability to control the time required to resolve the trouble ticket. It is the IT staff's responsibility to continue contacting the vendor to ensure a timely response.

IN-HOUSE COA

An In-house CoA is the method defined when it is possible to fix the issues necessary within the ACCS IT Staff. IT Staff will determine a CoA that can be implemented within the expected timeframe.

Should a course of action prove ineffective, it is always possible the IT Staff will reevaluate the situation and determine a new CoA, which might possibly escalate the ticket.

THE IN-DEPTH EXAMPLE

MONDAY

John arrives at work on Monday intent upon finishing the report he needs by Friday. While powering on his computer, he notices the light on his printer blinking. Since it isn't the ink cartridge indicator light, John does not know what the problem is on his printer. John knows not to take apart the printer himself or try to do repairs, so he goes onto the portal and puts in a trouble ticket.

Jim, who works for the IT staff, has just finished looking over his emails when he receives an email for a trouble ticket. It appears John is having problems with his printer. John selected a due date of Thursday for his printer being fixed, so apparently there is a special need on Friday. Jim looks over his schedule, and decides he will work on the printer on Tuesday. Jim adds a comment into the Kace to appraise John of the decision and situation.

John receives a ticket update from Jim (from the Kace). John understands the decision to wait until Tuesday to start work on the printer. John continues to work on his report.

TUESDAY

Jim arrives in on Tuesday morning and immediately goes to John's office. John is taking his coat off as Jim arrives, and they greet each other respectfully. Jim takes a look at John's printer and does some preliminary investigations. After Jim uses his tablet to do some research, he wants to discuss the situation with other colleagues to determine a best course of action. Jim and John discuss the current issue. Jim asks if John has any questions and leaves to continue the work.

When he leaves, Jim puts the information in the Kace to keep a running dialogue of the situation. The Kace automatically sends out emails to John and Jim notifying them of the update.

WEDNESDAY

After discussing various methods to fix the printer it is decided that it is cheaper and easier to replace. Jim puts this decision into the Kace to notifying John of the change. John replies to the email, concerned about the time requirements to print his report with his specialized printer. Because of John's concern, Jim decides to escalate the ticket to a higher priority. As Jim is not in charge of purchasing, he has the ticket assigned to another IT staff member.

Tim, who is in charge of purchasing within the IT Staff, receives the notification of the ticket being assigned to his care. He sees the high priority of the ticket and decides to push through the purchase order so that the ticket can be resolved in a timely manner. Tim adds a comment into the Kace to let John know about the current status and situation.

THURSDAY

Tim receives the notification the printer will be delivered today. After receiving this confirmation, Tim reassigns Jim to the trouble ticket and adds a comment detailing the information received. When the printer comes in, Jim installs the printer in John's office. After asking if John has any questions, Jim leaves the office and closes the ticket on his tablet. John is happy the printer is replaced and ready to do his printing.

As John sits down to complete his report, an email arrives in his inbox. John has been requested to complete a survey regarding the trouble ticket. John, who is extremely satisfied with the way the ticket is handled, is more than willing to fill out the survey. John also knows that should there have been a problem with the way the ticket was handled, he has a method to voice his concerns.