Summary

The “Desktop Support Daily Operations Guide” sets forth policies and procedures for CCIT’s Desktop Support group with respect to the following:

• the management of client submitted requests, the triage of requests,
• the scheduling of appointments to resolve requests within established service windows,
• the standards to be maintained in communicating status, and
• the handling of situations that may arise.

This guide is designed to ensure continually excellent service for CCIT’s desktop support clients.

Daily Review of Support Requests

• Each morning and as necessary during a given business day, a review process will be initiated across support requests by a team member responsible for a product group.

• During the review process, this team member (reviewer) will prioritize and re-prioritized support requests as per CCIT’s Technical Support Policy so as to ensure that tickets of greater severity receive higher priority.

  o Where further information is required to assess the severity of a support request, the reviewer will contact the person(s) requesting support for additional information.

  o All additional information used in determination of severity /level should be documented within the support request.

• Support requests bundled within the content of a single ticket will be unbundled as separate tickets for purposes of tracking and prioritization.

• Tickets representing support requests that require a multi-stage process for resolution will be divided into component tickets with all dependencies established between the component tickets.

• For existing support requests:

  o A determination will be made as to whether circumstances or hindrances noted as preventing the forward progress towards resolution of a ticket have changed.

    • Where necessary, steps necessary to affect circumstances or remove hindrances will be documented within the ticket and scheduled so as to progress the resolution of the support request.

  o Estimates of time necessary to resolve or effect the plan of action will be revised for purposes of scheduling service appointments within the service windows of team members.

  o The client(s) associated with the support request will be notified of any change of circumstances permitting forward progress or any necessary actions and their scheduling.

  o For ticket(s) where no action is presently required, a quick note to the client(s) should indicate the continuing present state of affairs.

• For new support requests:

  o The reviewer will document within the ticket an appropriate action plan for resolution of the ticket.

  o Initial estimates of the amount of time necessary to affect the action plan will be established for purposes of scheduling service appointments within the service windows of team members.

• For all tickets, keywords and status fields will be modified as necessary to reflect the
current status of the support request.

- If the modifications made to the ticket solely reflect stateful information relevant only to internal CCIT processes, the communication should be denoted as Private prior to submission of the modifications.

### Daily Scheduling of Service Appointments

- Each morning and as necessary during a given business day, a service appointment scheduling process will be initiated across support requests by a team member responsible for a product group after a review process (as described above) completes.

- During the service appointment scheduling process, this team member (appointment scheduler) will determine whether tickets of greater severity have displaced formerly scheduled service appointments of tickets with lesser severity.

  - Displaced service appointments will require re-scheduling.

- The appointment scheduler will call, in order of greater to lesser severity, the client(s) associated with a support request to schedule or re-schedule a service appointment.

  - A phone call is the preferred medium for communication. Where not practical, an email may be substituted.

- Requests of lesser severity may be inserted into the service window amongst requests of greater priority when geographical proximity and the nature of the request suggest that a timely resolution might be accomplished without materially impacting:
  a) the servicing of requests of greater severity and
  b) the time to resolution of other requests within the parameters of target service levels.

- The scheduler will attempt to schedule as many appointments as possible within the daily service windows of qualified & available staff members observing order of severity and target service levels.

- The scheduler will confirm with clients the staff member who will service their request and the service window in which they will service. The scheduler will document the assignment and scheduling arrangements within the ticket filed within Bugzilla.

- The scheduler will compile and publish a master schedule to be made available to the CCIT team detailing the service windows and appointment schedules of staff servicing requests.

  - Appointments listed on the schedule will consist of staff member assigned, the associated support ticket number, and the contact information of the support requester.

- Individual service window schedules will be provided to assigned support team members.

### Pre-Departure of Support Team Members

- Prior to the beginning of a service window, team member will review all tickets assigned to them and denote acceptance of the assignment within Bugzilla.

- Team members will prepare and assemble all necessary materials and resources for successful accomplishment of scheduled tasks within the tickets assigned them.

### Assignment of Intern Team Members

- Requesters are to be informed of those requests for which intern team members have been assigned.

- Requesters should be advised of the following:
o To logoff of applications or services unrelated to the issue reported prior to the intern’s use of their system.

o To remove confidential or privileged materials within sight proximity of their workstations.

o To remain physically present throughout the period in which the assigned intern is working to resolve their issue.

o To supervise the activities of the intern assigned.

o To report any suspect activity that occurs.

Service Appointments

• Prior to each service appointment requiring a physical visit to the client(s) associated with the request, team members will contact the client(s) by phone alerting them that they are in transit.

  o If the client(s) are not present or will not be present for the appointment, a message will be left providing a call back number for the rescheduling of the appointment.

  o The team member should move on to the next service appointment within their service window.

• If the time required to complete a scheduled service appointment is materially greater than that estimated and threatens other appointments of equal or greater severity, the service appointment is to be truncated for later action or transferred to another team member of equal or greater qualification.

  o Where time bounds dictate that appointments to service requests of lesser severity must be dropped within the current service window, as soon as is reasonably possible, a phone call will be made to the affected client(s) and the cancellation will be documented within the associated Bugzilla ticket such that the support request is rescheduled.

• Prior to leaving a service appointment:

  o Team members will document their activities and the current status of the support request within the associated Bugzilla ticket. If additional action is necessary, all necessary steps required should be documented for review and later scheduling.

  o Team members will communicate their activities, the current status of the support request, and any additional actions required to the client(s).

• If a service window elapses and appointments scheduled within the service window have not yet been serviced, the team member will call or email the affected client(s) to apologize and to communicate that 1) they will be unable to keep their scheduled appointment and 2) they will work to re-schedule the appointment as soon as possible within a coming service window.

• Team members are to perform all actions in resolution of an issue or request strictly within the context of established policies and procedures. Should there be an issue with respect to policy or procedure, no action should be taken without supervisory approval.