

<b>High Level Description</b>	
Description	Help Desk Strategy
System(s) Impacted	Strategies
Document Type	Reference Guide
File Reference	Psshr://Cms/Training, Doc & Support/~Administrative Documentation /Reference Guides/RG_Help_Desk_Strategy.doc

<b>Revision Control</b>			
<b>Date</b>	<b>By</b>	<b>Action</b>	<b>Pages</b>
02/29/2003	C Medders	Document created	7
08/29/2005	C Medders	Updates throughout document	All
02/29/2008	A Everett	Document converted to accessible template	6
05/01/2009	A Everett	Document edited	6
06/09/2009	J Reeds	Document reviewed	6

## Table of Contents

Overview.....	2
Philosophy.....	2
Purpose.....	2
Scope.....	2
Documentation.....	3
Training.....	3
Communication.....	3
Tracking & Monitoring Calls.....	3
Hands-On Assistance.....	4
Help Desk Team.....	4
Responsibilities & Expectations.....	4
How it Works.....	5

## Overview

This references guide explains the philosophy, scope and setup of the CMS Help Desk for San José State University. In addition, it identifies the Help Desk Team, the various Help Desk levels and communication efforts.

## Philosophy

The CMS Help Desk is not designed to provide training to end users, but instead, to provide support for users of the system after training has taken place and the system is live. The Help Desk staff will answer specific questions the user may have about a process, assist with basic navigation, assist users with system login and troubleshoot technical difficulties. It is the desire of the CMS Project Team to provide online assistance with Frequently Asked Questions (FAQs) available on the CMS Website in addition to live help desk assistance.

As is consistent with the entire implementation, customer service is critical to the effectiveness of the Help Desk. Response times for email and phone calls will be as immediate as possible. We want our users to feel comfortable contacting the Help Desk and feel confident that their problem, question or request will be handled in a positive and timely manner.

## Purpose

The purpose of the Help Desk is to provide end users with support and assistance with PeopleSoft and its associated systems and processes. It is critical for users to have a place to ask questions and get resolution for problems that may be impeding their job responsibilities.

## Scope

The following modules are live and currently supported by the Help Desk:

### Finance

- Accounts Payable
- Accounts Receivable/Billing
- Finance Web Component
- General Ledger
- Purchasing

### Human Resources

- Administer Training
- Administer Workforce
- Benefits Administration
- Labor Cost Distribution
- Manage Labor Relations
- Manage Positions
- Recruit Workforce
- Report Regulations
- Temporary Faculty
- Time & Labor

### Student Administration

- Academic Advising
- Admissions
- Financial Aid
- Records
- Student Financials

## **Documentation**

The Help Desk staff will be equipped with business process guides, quick reference guides, flowcharts and technical manuals as appropriate. Reports will be run frequently from the tracking system so that the staff may respond quickly to similar calls that may come in.

All business process guides, quick reference guides and flowcharts will be available on the CMS Website and the MySJSU Help page. In addition, Frequently Asked Questions (FAQs) will be on both sites for all end users to access.

## **Training**

The Level 0 contacts will go through a variety of basic training classes in order to have a thorough understanding of the product and how it works. They will not be expected to understand the complexities of each process, but will be expected to understand login, navigation and basic PeopleSoft field capabilities (for example, list boxes, valid values, etc).

The Level 1 contacts (campus Subject Matter Experts, or SMEs) will go through more complex training in order to best answer and resolve problems in their respective areas. A number of the functional SMEs have been through system-wide prototyping and fit/gap, as well as PeopleSoft training, and are currently prepared to handle the responsibility of being a Level 1 contact. For those who need additional training, they will be required to attend the appropriate training sessions designed for all end users. Technical SMEs have also been through a variety of PeopleSoft training classes, but may go through some basic training to get an understanding of the front end of the product in order to best solve the end user's problem.

## **Communication**

### **CMS Website**

The CMS website will be used to list Frequently Asked Questions (FAQs) and will also have information about how to contact the Help Desk (by telephone and email). In addition, a variety of business process guides and quick reference guides will be made available.

### **MySJSU**

The MySJSU portal will be used to communicate critical information related to student and employee self service, as well as system availability. Frequently Asked Questions (FAQs) and numerous quick reference guides will also be available.

### **CMS ListSerts**

Numerous ListSerts have been created in order to communicate with users on a more immediate level. Information such as system downtime and process changes will be communicated in this manner.

### **Direct Employee Contact**

Employees in training classes will be given a brief overview of how the Help Desk works and how they can contact them. A one-page document describing the Help Desk and how it should be used will be included in each training manual so users may have this readily available when they need it.

## **Tracking & Monitoring Calls**

The Track-It system is used to track the help desk calls and resolutions. This includes all email inquiries as well. This software allows a variety of data to be tracked and also allows reporting in order to monitor common help desk inquiries. The manager will monitor common calls and make a decision whether or not to offer additional training classes on those areas.

When an item must be referred to the CSU CMS Help Desk, it will be logged into the CSU CMS Help Desk system (currently using Remedy software) and referenced in Track-It with the number assigned.

## Hands-On Assistance

If the Help Desk staff feels an end user may need additional help after the initial training has been completed, they may offer one-on-one sessions or open labs for assistance. These sessions are designed for users to come and practice with on-site assistance from power users and/or trainers. This will be a time for users to refresh their memory on training they may have had several weeks before, and will also give them an opportunity to ask questions they may not have thought of during the training sessions. Open Labs will be announced via the CMS Information ListServ, and will also be scheduled via the Administer Training module in PeopleSoft.

## Help Desk Team

The Help Desk Team consists of the following individuals:

- Manager: Carrie Medders
- SJSU Level 0: Ryan Campbell
- SJSU Level 0: Twinki Mistry
  
- SJSU Level 1
  - Functional
    - Finance
    - Linda Loucks
    - Cecilia Hoang
  - Human Resources
    - Heidi Dunkle
    - Jill Gran (Admin Training only)
  - Student Administration
    - Nancy Day
    - Kristina Hernandez
  - Technical
    - Database
    - Processing
    - Networking
    - Reporting
    - Security
    - Web
  
- SJSU Level 2: CSU CMS Help Desk

## Responsibilities & Expectations

### Manager

The manager is responsible for monitoring the use of the help desk by running reports from the Track-It system and analyzing the types of problems, questions and requests that are being logged. The manager will also monitor response times and will work with staff and/or their managers to improve if required. In addition, the manager will decide, in collaboration with the training team, whether or not additional training classes need to be offered for items logged repetitively by the user community. The manager will oversee the hands-on assistance sessions and will work with campus SMEs to ensure their availability to assist users during the transition periods.

The manager will ensure that all campus SMEs, as well as the Level 0 contact, are appropriately trained for their responsibilities.

## SJSU Level 0

The Level 0 contact is responsible for gathering the initial information and performing an initial analysis on the user's problem, question or request. They will log the ticket into Track-It and will have direct contact with the user by email or telephone. They will be expected to reply to email within two business days and to voicemail within one business day. It is understood that there will be peak periods of time in which response times may increase, but the expectation is for the Level 0 contact to respond as soon as possible.

If they are able to answer the user's question or request, or can solve the problem, they will be expected to do so and log the resolution into the Track-It system. If they must escalate the ticket, they will do so immediately upon recognizing the need to do so. They will notify the user that the ticket has been escalated.

## SJSU Level 1

The Level 1 contacts, or campus SMEs, will be sent an email notification via the Track-It system when a ticket has been assigned to them. It is expected that the SME will respond to the ticket within 24 hours of its initial login time. If they plan to be away from their desk for an extended period of time (meetings, other work responsibilities, vacation, etc), they are expected to notify the Level 0 contact so they can assign the tickets to the backup or another SME. When the SME contacts the user, they should estimate how long the issue will take to be resolved and let them know.

If the Level 1 contact is able to answer the user's question or request, or can solve the problem, they will be expected to do so within two working days. They will be expected to email the resolution to the Level 0 contact who will log it into the Track-It system. This will ensure consistency and data integrity. If they feel the problem may need to be escalated to the CSU CMS Help Desk, they will exhaust all on-campus possibilities first (for example, check with technical staff or other SMEs). If they must escalate the ticket, they will do so immediately upon recognizing the need to do so. They will notify the user the ticket has been escalated, and will update the user of the progress toward resolution. In addition, they will notify the Level 0 contact who will update Track-It as appropriate.

## How it Works

When an end user has a problem with a functional aspect of PeopleSoft or is having a technical difficulty, they will contact the SJSU CMS Help Desk in one of two ways. They may send email or call the Help Desk directly (to obtain login information, they must submit their request via email). The Level 0 contact will check the email regularly throughout the workday (8:00 am – 4:30 pm) and respond accordingly. Email contact should be used for problems that do not impede the user from completing their work. For example, if an end user ran into a problem with a report that they run every now and then, it would not be critical to have it solved right away. But if not getting the problem solved prevents an employee from being hired, for example, then the user should call the Help Desk directly.

## Contact and Escalation

- **STEP 1 – Initial Contact:**
  - **Email:** When the Level 0 contact receives an email from an end user, they will first log the contact into the Track-It system, and then analyze the nature of the problem. If they are unclear and need more information, they will contact the end user via email to obtain the additional information needed. Once they have received all necessary information, they will either respond directly to the end user via email or escalate the problem to a campus Subject Matter Expert (SME). All contact will be logged into Track-It.
  - **Telephone:** When the Level 0 contact receives a call from an end user, they will first analyze the nature of the problem and gain additional information from the end user if necessary, and then log the contact into Track-It. An end user may have to leave a voicemail for the Level 0 contact during high volume periods. The Level 0 contact will be expected to check voicemail and respond as soon as possible. Once all necessary information has been received, the Level 0 contact will either respond directly to the end user or escalate the problem to a campus Subject Matter Expert (SME). All contact will be logged into Track-It.

- **STEP 2 – Referral to Campus SME:**

- **Email:** The Level 0 contact will electronically forward the email problem to the appropriate campus SME, logging into Track-It that the ticket has been referred on. Once the problem has been escalated to Level 1, the campus SME will further analyze the problem and request additional information if needed. At this level, the SME will have contact with the end user via telephone. They will work with the end user to resolve the problem. If they are unable to come to a resolution, the problem will be escalated to the CSU CMS Help Desk. If the SME is able to resolve the ticket, they will email the resolution to the Level 0 contact and notify the user of the solution. When responding to the Help Desk, the Level 1 contact should always include the resolution for tracking purposes. The user must “sign-off” on the proposed solution before the ticket can be closed in Track-It.
- **Telephone:** The Level 0 contact will electronically refer the information to the Level 1 contact, logging into Track-It that the ticket has been referred on. Once the problem has been escalated to Level 1, the campus SME will further analyze the problem and request additional information if needed. They will work with the end user to resolve the problem. If they are unable to come to a resolution, then the problem will be escalated to the CSU CMS Help Desk. If the SME is able to resolve the ticket, they will email the resolution to the Level 0 contact and notify the user of the solution. When responding to the Help Desk, the Level 1 contact should always include the resolution for tracking purposes. The user must “sign-off” on the proposed solution before the ticket can be closed in Track-It.

- **STEP 3 – Referral to CSU CMS Help Desk:**

- For escalation to the CSU CMS Help Desk, the Level 1 contact will log a ticket into the CSU CMS Help Desk system (currently using Remedy software). They will reference the Track-It ticket number within the system to best track the progress of the item. Once the problem has been escalated to the CSU CMS Help Desk, it will be the responsibility of the Level 1 contact to follow up and make sure the end user is kept abreast of the resolution process. When the CSU CMS Help Desk has resolved the problem, they will notify the campus SME for sign-off on the proposed solution. The campus SME will obtain sign-off from the end user before closing the ticket with the CSU CMS Help Desk. Once the user has approved the solution, the campus SME will notify the CSU CMS Help Desk to close the ticket and will also notify the SJSU Level 0 contact to close the ticket in the Track-It system. When responding to the Help Desk, the Level 1 contact should always include the resolution for tracking purposes.

- **STEP 4 – CSU CMS Help Desk:**

- Once the CSU CMS Help Desk has received the ticket, they will assign it to the appropriate party for resolution. The CSU CMS Help Desk representative will work with the campus SME to obtain additional information if required. They may contact the end user directly if appropriate. If the initial representative is unable to solve the problem, they will refer it to the HOSS (Hardware Operations Support & Services) or SOSS (Software Operations Support & Services) staff. These are the most highly trained subject matter experts on the CMS system. They will work with the campus SMEs to resolve the problem.