Jjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjjj

**Service Desk Procedures Manual**

**Iowa Western**

**Community College**



Contents

[Mission Statement 4](#_Toc500841637)

[Goals 5](#_Toc500841638)

[Service Level Agreement (SLA) 6](#_Toc500841639)

[Email and Internet Usage Policy 7](#_Toc500841640)

[osTicket 8](#_Toc500841641)

[Accessing the osTicket site 8](#_Toc500841642)

[Opening a new ticket 10](#_Toc500841643)

[Ticket Creation Information Process Map 13](#_Toc500841644)

[Ticket Management 14](#_Toc500841645)

[Tickets Front Page 14](#_Toc500841646)

[Ticket Thread 16](#_Toc500841647)

[Responding, Resolving, Closing 16](#_Toc500841648)

[Using the FAQ 17](#_Toc500841649)

[Setting up new users 23](#_Toc500841650)

[Ticket Assignment Policy 25](#_Toc500841651)

[Customer Communication Policy 26](#_Toc500841652)

[Backup Policy 27](#_Toc500841653)

[Customer Satisfaction Survey 28](#_Toc500841654)

[Glossary 29](#_Toc500841655)

[Project Resources 32](#_Toc500841656)

[Email Policy 32](#_Toc500841657)

[Customer Communication Policy 32](#_Toc500841658)

[Backup Policy 32](#_Toc500841659)

# Mission Statement

The mission of the Iowa Western Community College (IWCC) Help Desk is to assist in upping our internal and external user communities by enabling our users through making Information Technology resources readily available and accessible. We achieve this by providing assistance with electronic devices such as but not limited to; Smartphones, Tablet PCs, Apple iOS, and Netbooks in a single point of contact for customer-focused, quality services and support.

# Goals

* Provide a timely and accurate statues update
* Inform customer on request status and progress
* Deliver high quality service
* Monitor calls
* Produce measurements and metrics
* Ensuring users satisfaction

# Service Level Agreement (SLA)

Availability- Will be open on Monday through Friday 9am-5pm. Will be closed on holidays.

Tickets- Reassigning ticket to a new agent if it’s past overdue.

Contacts- Will contact customers through e-mail, phone calls, and voice messages.

Reliability- Won’t be open on school breaks and holidays.

Performance- Will not keep customers waiting any more than 2 minutes.

Security- Strong passwords will be used to access services.

Charging- Free for IWCC students.

# Email and Internet Usage Policy

Email and internet extensions are assigned to an employee’s computer for the sole purpose of conducting company business. Some assignments and responsibilities at the help desk require access to the internet and email. Only technicians that are appropriately authorized, for company purposes, may use the internet to access and download any needed, additional software.

Email is also to be used for company/help desk business only. You are not to conduct any personal business using company computers or email. Non-business related emails waste company and employee time and attention. Any email content that discriminates any protected classification including age, race, color, religion, sec, national origin, disability, genetic information, sexual preference and even weight is prohibited.

Keep in mind that the company owns any communication that is sent via email or otherwise stored on company equipment, such as computers, flash drives, or external hard drives. Management and other authorized staff have the right to access your email or material on your computer at any time. Please do not consider your electronic communication, storage, connection, or access to be private if it is created or stored on work systems and servers.

Internet use on company time using devices that are connected to the company network is authorized to conduct company business only. Internet use also creates the possibility of contamination in our system via viruses, malware, and spyware. For this reason, and to assure the use of work time appropriately for work, we ask technicians to limit internet use.

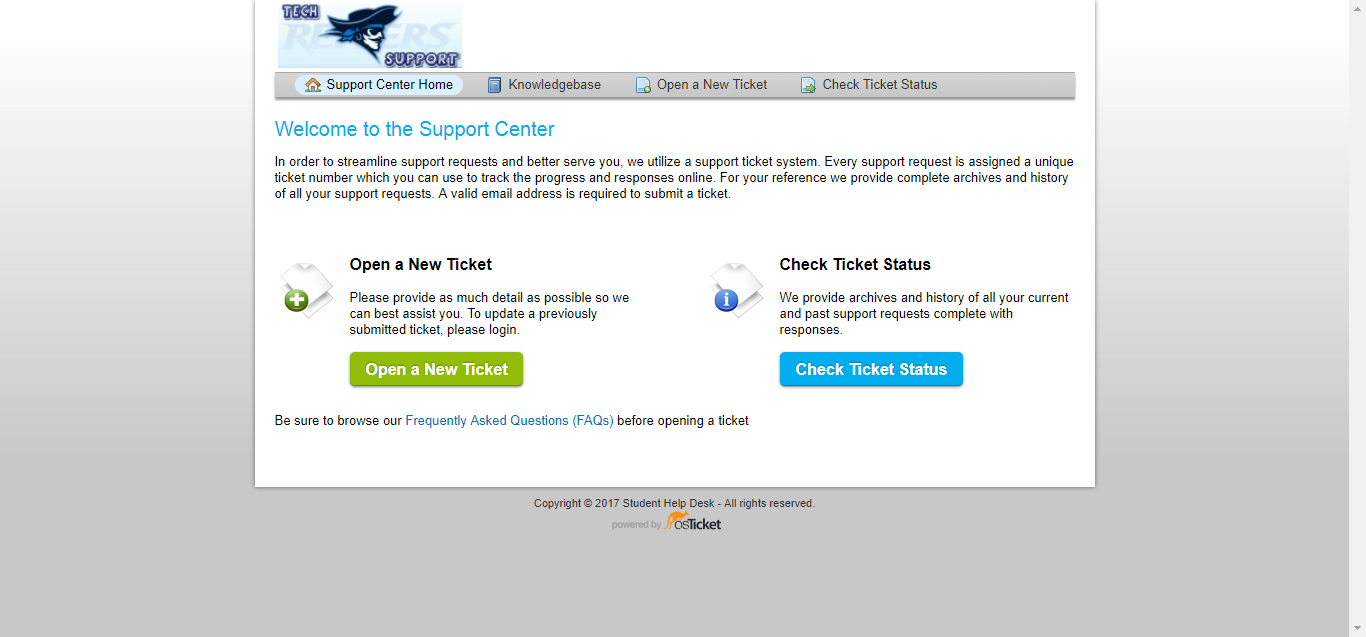
# osTicket

osTicket is the ticket request system used for customers to request for services from the help desk. On the osTicket website, a technician can manage inquiries, messages, incoming tickets, the FAQ, and much more.

## Accessing the osTicket site

To access the osTicket site as a customer, open a web browser and type: [**http://pcsupport.ecc.iwcc.edu/**](http://pcsupport.ecc.iwcc.edu/)

The webpage should look like this.

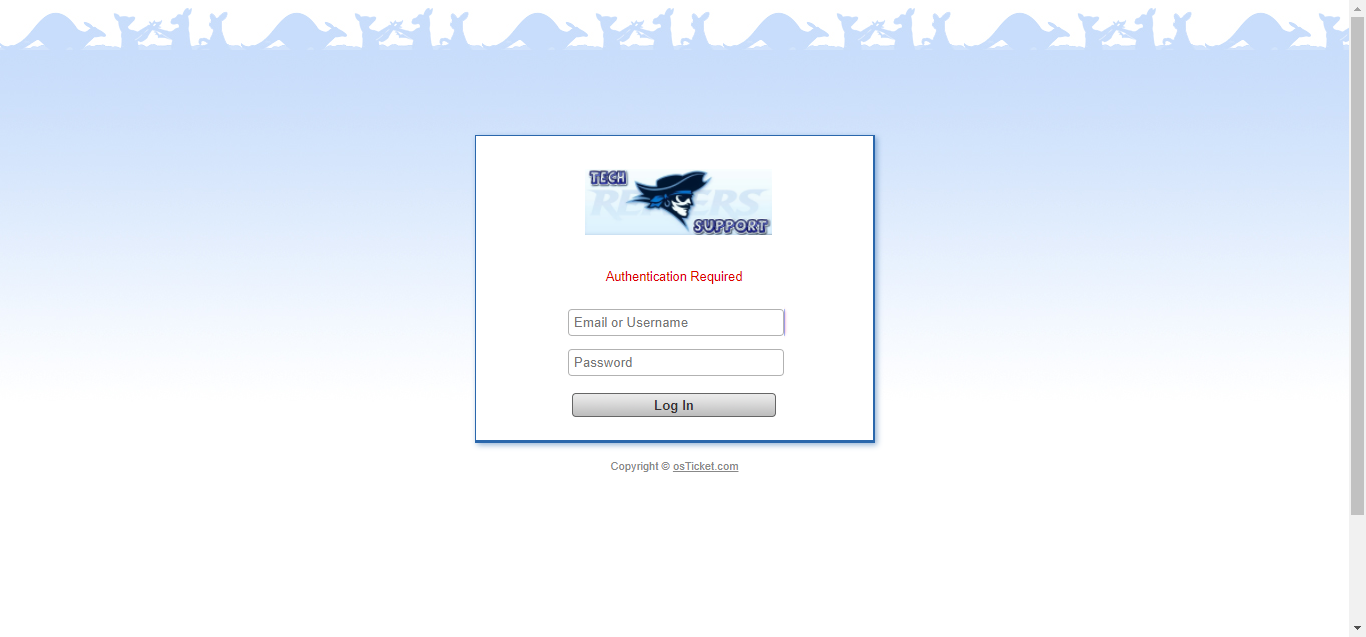


This is useful information to give to any non-technician customer that may need to create a ticket in the future without the help of a technician. However, in this manual we won’t be focusing on this page too much.

To access the osTicket site as a technician, open a web browser and type:

[**http://pcsupport.ecc.iwcc.edu/scp/**](http://pcsupport.ecc.iwcc.edu/scp/)

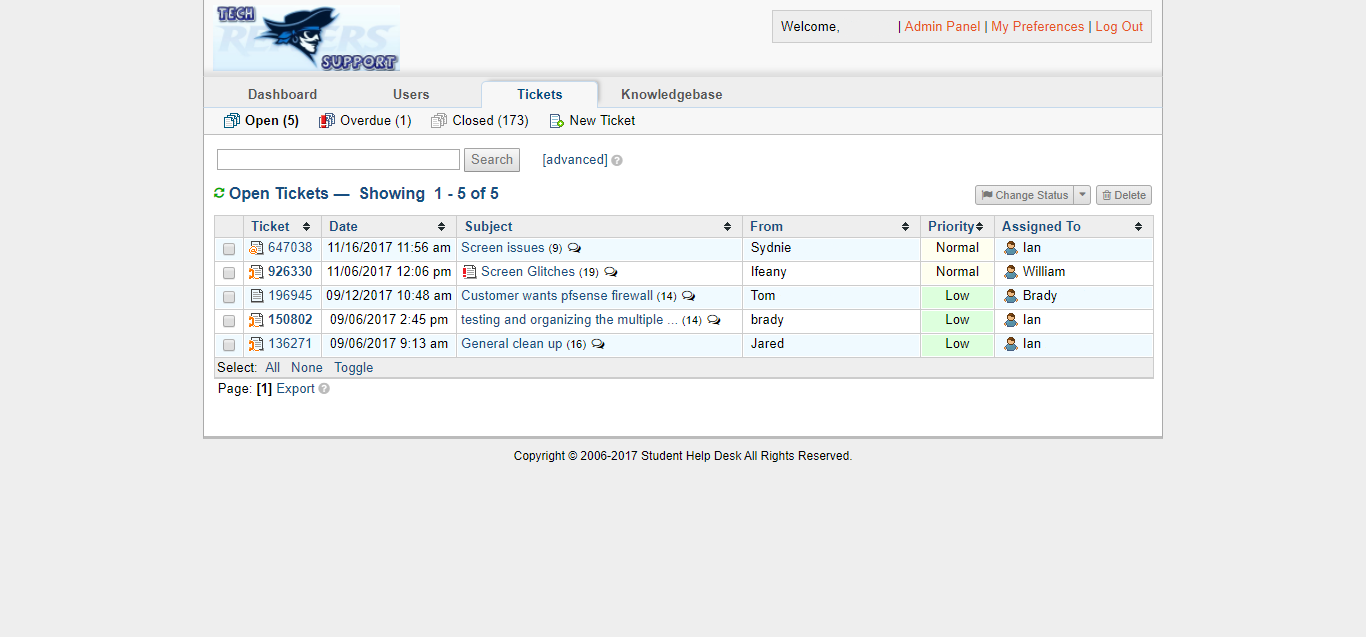
The webpage should look like this.



Simply type in your username and password to proceed to the technician page.

(If you have forgotten your password, or do not recall making an account for osTicket, please contact a supervisor)

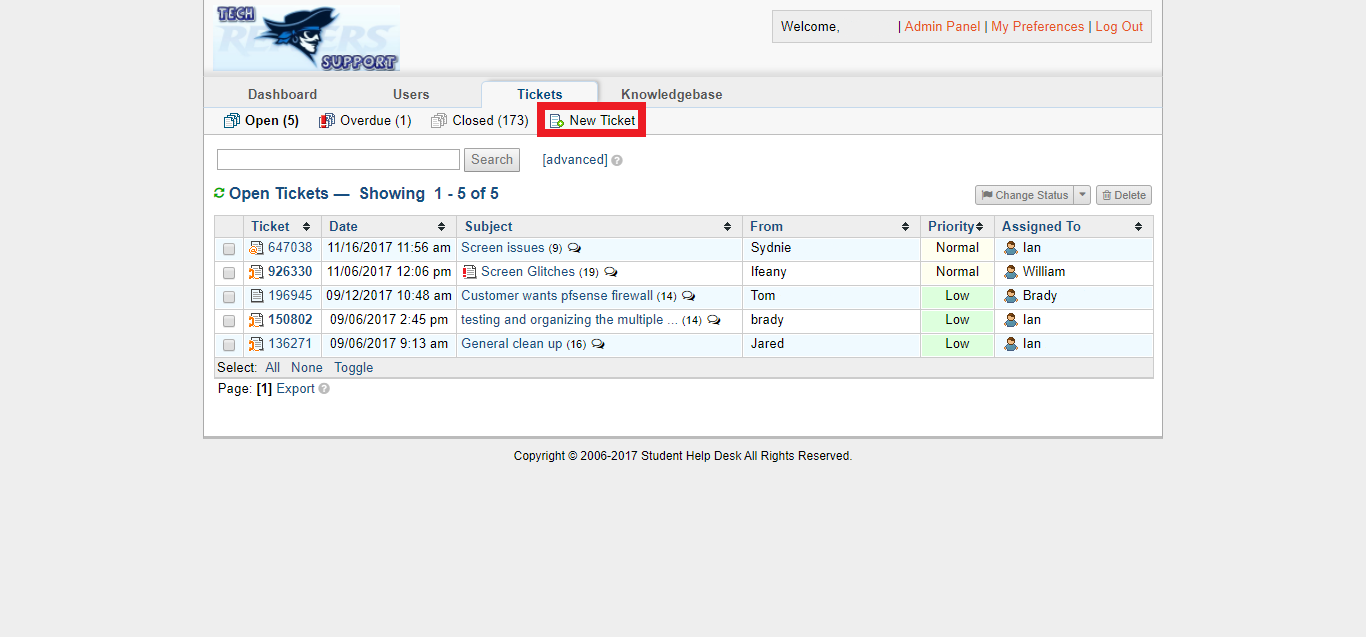
Once you have logged in, the webpage should look similar to this.



## Opening a new ticket

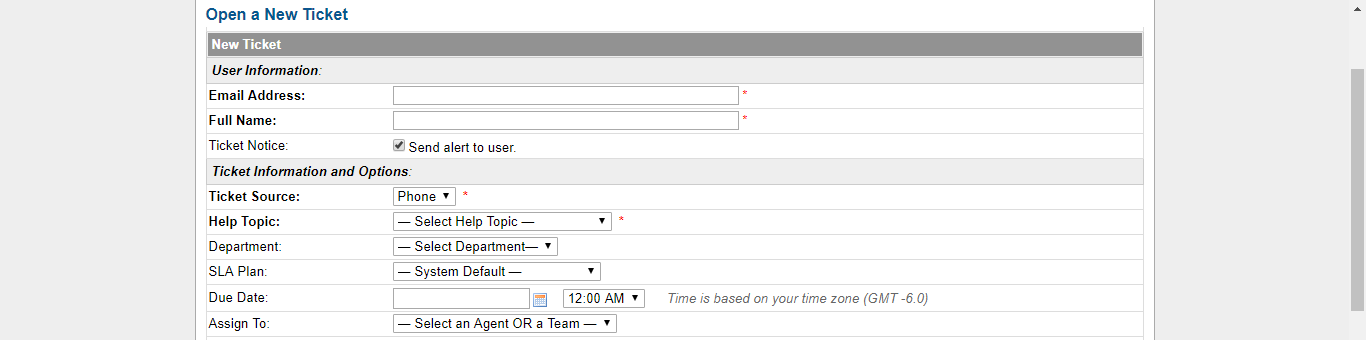
To create a new ticket:

1. After logging into the osTicket site, click on “**New Ticket”** at the top of the tickets list page.



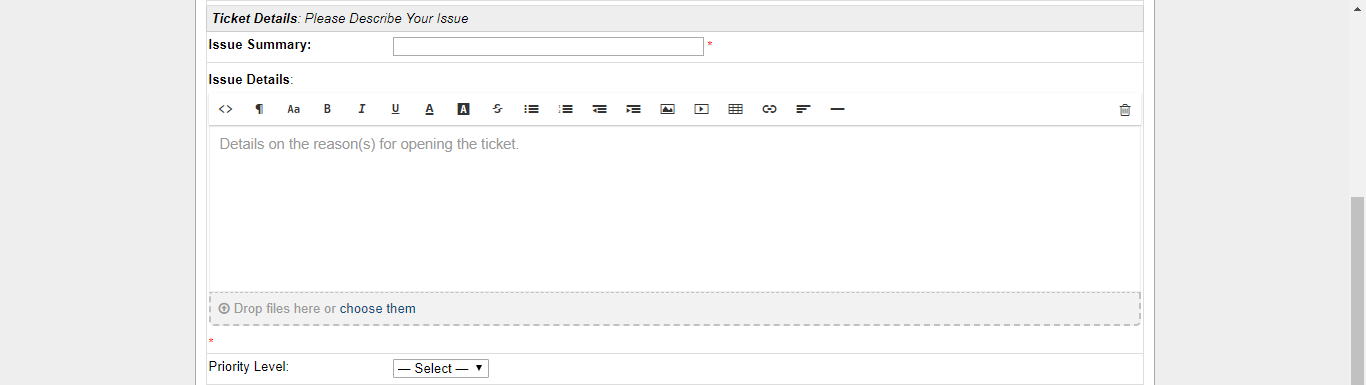
2. On the “**Open a New Ticket”** page, you must fill in the customer and ticket information:

* E-mail address of the customer - *Ask customer.*
* Customer’s full name - *Ask customer.*
* Help topic - *What is the topic of the issue?*
* Department - *Which department does the issue belong to?*
* SLA Plan - *Which SLA will this incident fall under?*
* Due Date - *What is the time frame this incident will have to be solved in?*
* Assign To - *Who will handle the ticket? Will it be the creator or will it be handed off to a different agent?*



3. Below the information boxes, you will describe the issue. Here is where you will title the issue by using a short issue summary and describe the issue in full detail within this box.

After defining the issue, you will define a priority level. How urgent is the issue? Is it something that needs to be solved immediately or could do with taking a few days to solve?

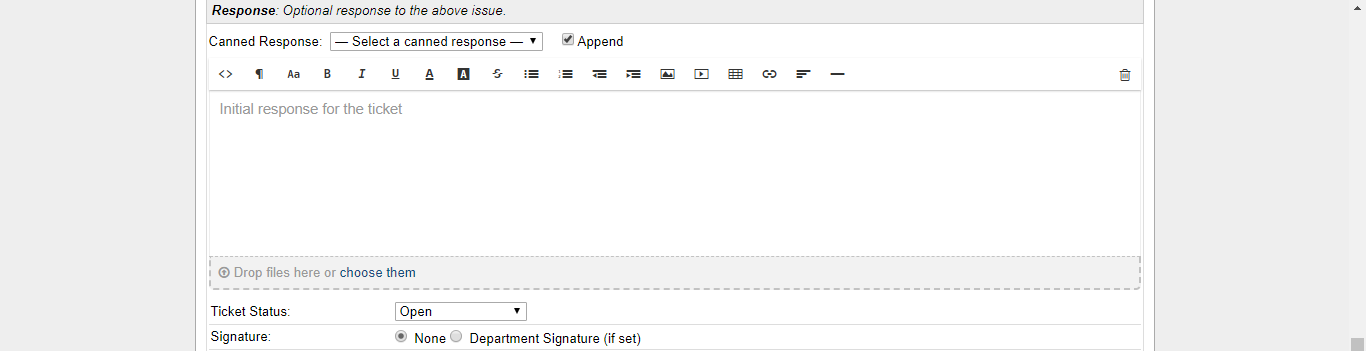


4. Once the issue has been defined, it is time to choose a response for the ticket.

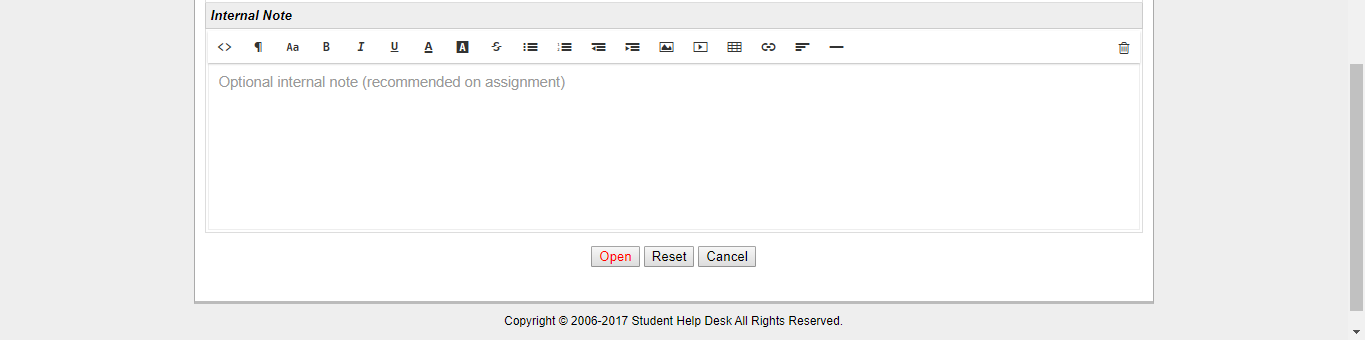
A ticket response is entirely optional and skipped over. For ticket response, there are a few options one could choose. A canned response would be the easiest option. A canned response is a list of a responses already pre-made. From the drop down list, you would select the most appropriate response. However, if you decide to, you could make up your own response in the text box.

After deciding on a ticket response, you will choose whether to keep the ticket open or close the ticket. Keep in mind, the ticket should only be closed if the issue has been solved and customer has picked up an necessary devices.

If your department has and uses a set signature, you can choose whether or not to display it in the ticket response. If you are unsure, you can ask another technician or contact a supervisor.

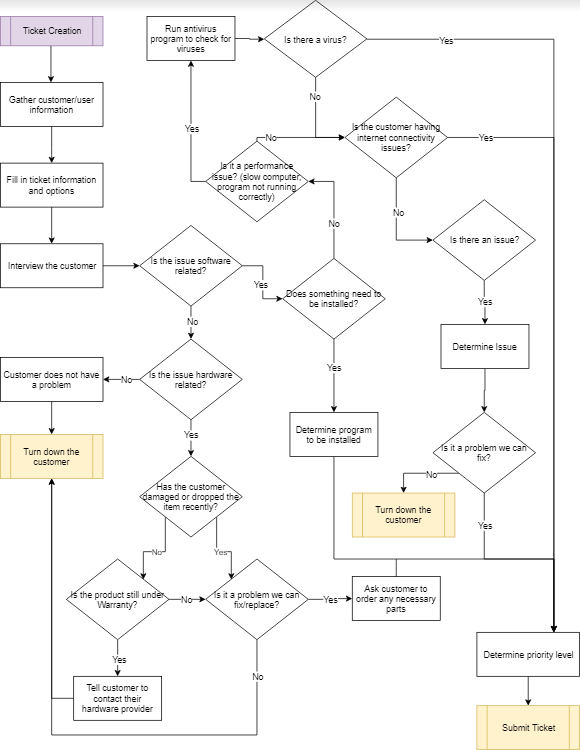


5. Internal notes will be notes only seen by other technicians. If you have any input or advice about the issue, here is where you would communicate it to the technician assigned to the ticket.



6. Once you have all the information in order, click “**Open**.” Your new ticket should appear in the open tickets section of osTicket.

## Ticket Creation Information Process Map



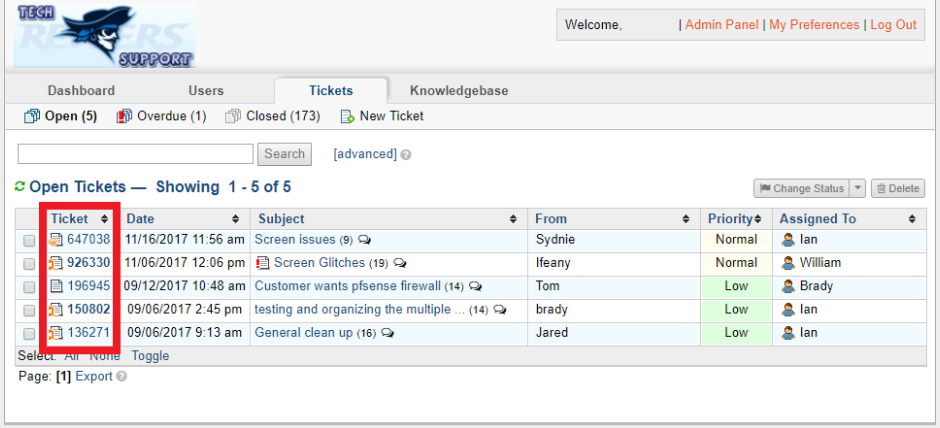
# Ticket Management

As a technician, you may have to do some ticket management, which would include reassigning tickets, viewing and adding internal notes, changing the due date or ticket status, etc.

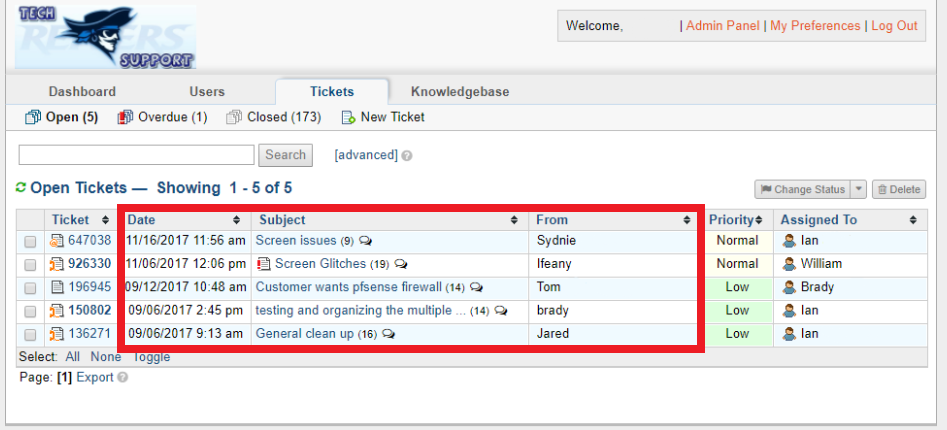
## Tickets Front Page

On the front page, you will be able to see general information about open, closed, and overdue tickets.

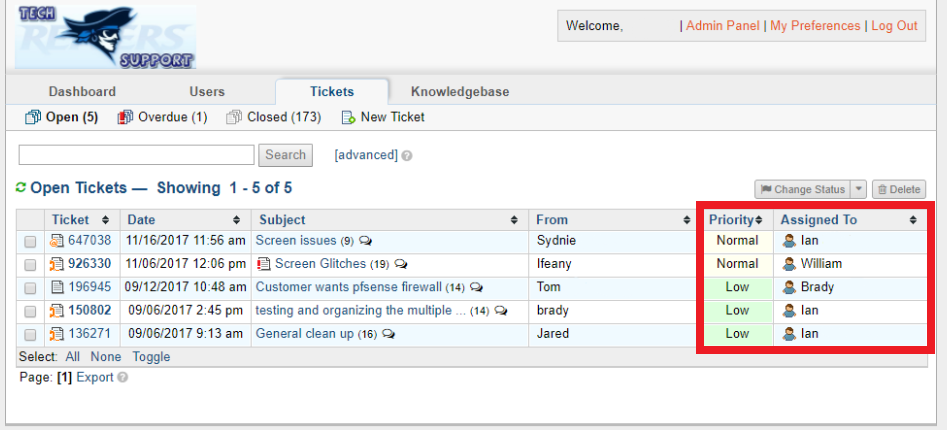
Beginning on the left hand side, you will see the ticket numbers. This is used as a reference for the specific ticket you or the customer may be looking for. Each number is unique to the case it represents so there are no two alike numbers.



Next, you will see the date the ticket was created, the subject of the ticket and by whom it was created.



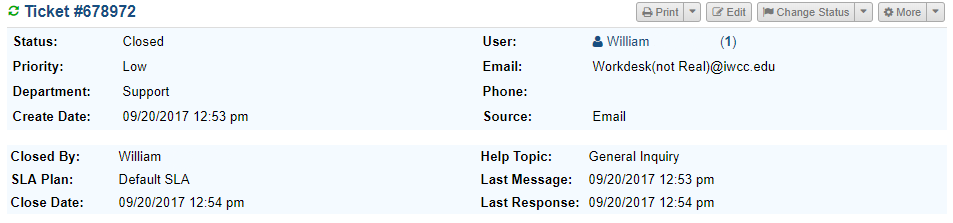
Lastly, you will see the priority level of each ticket and the technician it has been assigned to.



## 

## Ticket Thread

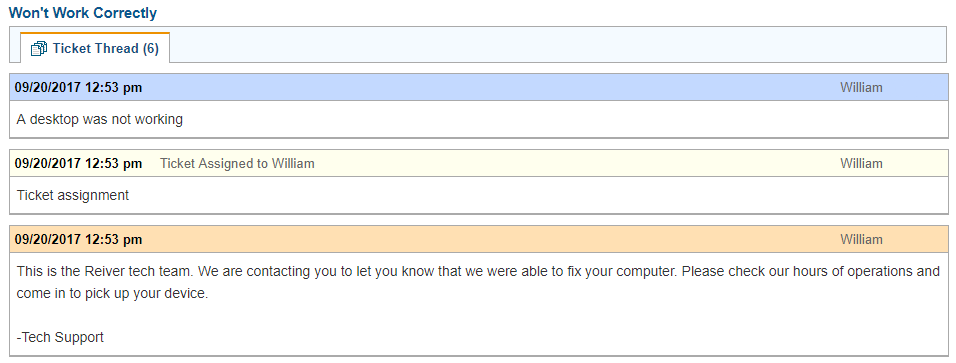
When you click on a ticket number, it will open up the ticket thread. Here, you will see general ticket info, ticket status, priority, ticket creation, due date, technician assigned, customer name and contact info.



Below the ticket information box is the ticket thread. The ticket thread will display all the internal messages between technicians and automated messages by the system, such as ticket overdue messages. These messages are color coded as such:

**Blue** - Initial message describing the issue

**Yellow** - Internal messages by the technicians and system

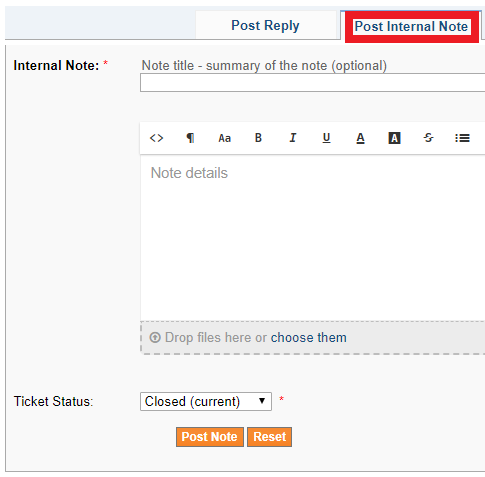
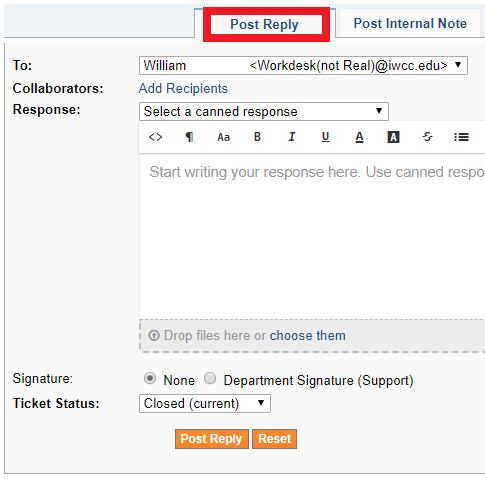
**Orange** - Reply messages sent to the customer with the ticket 

## Responding, Resolving, Closing

Under the ticket thread, you are able to post your own replies to the customer by selecting “**Post Reply**.” You can select from the list of canned messages or make up your own. This will send an e-mail directly to the customer and can be used when you are in need of more information from the customer or giving updates on the status of the issue.

If you select “**Post Internal Note**” you can post replies that only technicians will be able to see. This is useful in asking for or giving advice in order to resolve an issue quicker.

From both these tabs, you can also change the status of the ticket from **Open** to **Waiting Response, Resolved** or **Closed.**

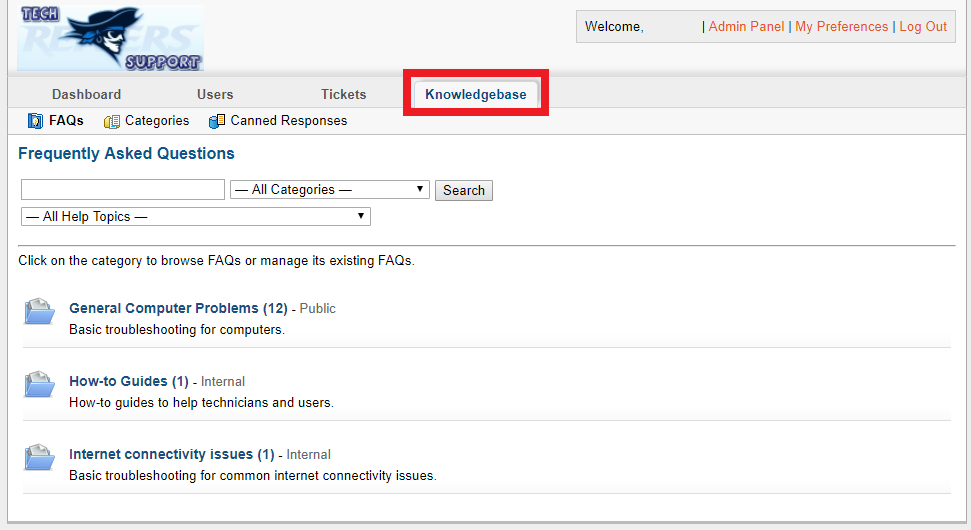
****

# Using the FAQ

Our osTicket site provides a technician operated knowledge base, or more commonly referred to as an FAQ (Frequently Asked Questions). This is useful for any common issues or questions that arise, they can be put in the the FAQ for others to use.

This is not only visible to technicians but can also be made visible to customers. Rather than customers bringing in their device for any small issue, they can first browse the FAQ knowledgebase for an answer to their problem.

To access the FAQ, click on the “**Knowledgebase**” tab at the top of the page. It’ll bring you to the FAQ forum.

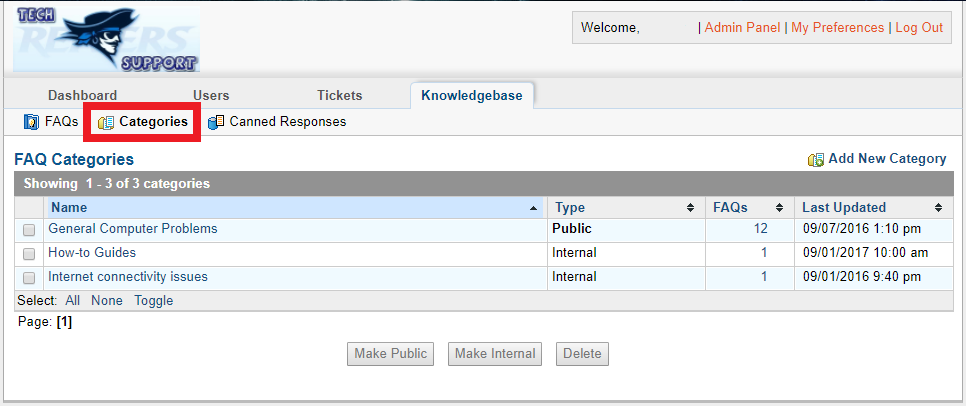


From this page you can browse the categories for more information on how to solve an issue, granted it is kept updated frequently.

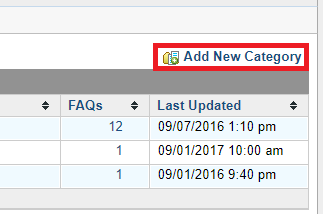
As more common issues and questions arrive, it may be useful to you and your fellow technicians to add your own expertise to the FAQ.

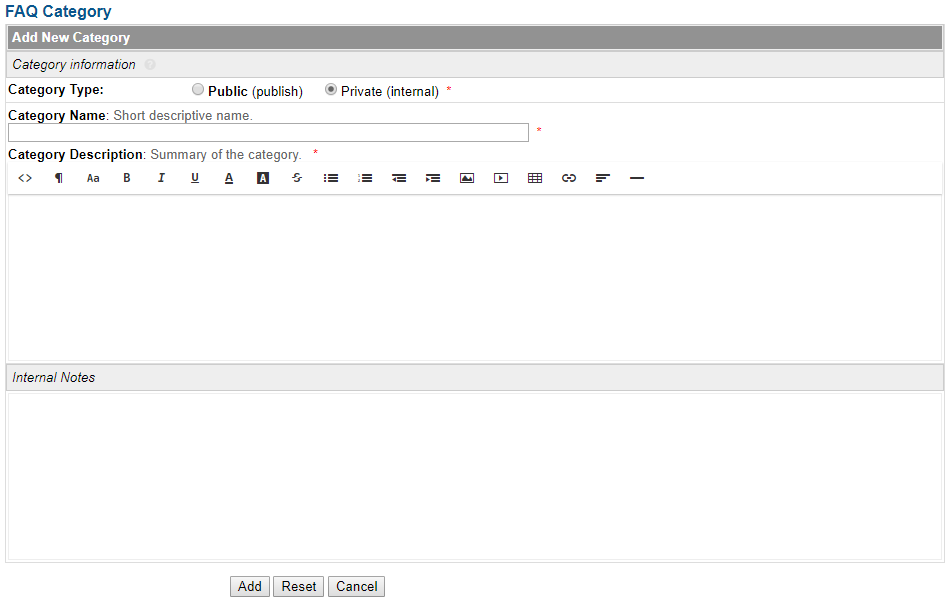
To add on to the FAQ:

1. Select the category in which your topic belongs to. If there is not a category created for your topic, select the closest one or create a new one by selecting “**Categories”**

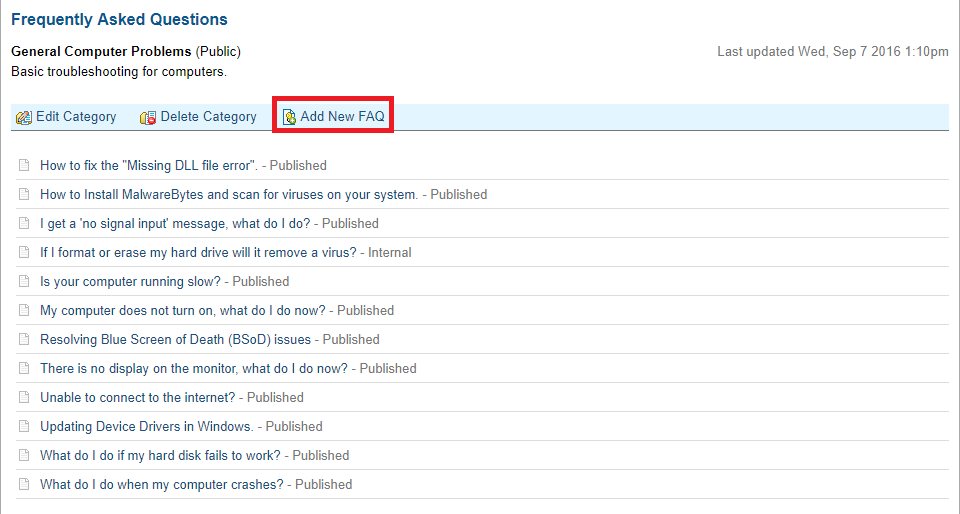


From this page, select “**Add New Category”** provide the new Category Name, Description, Internal Notes, and Category Type (Public or Private). Once you have provided the necessary info, click “**Add”**.



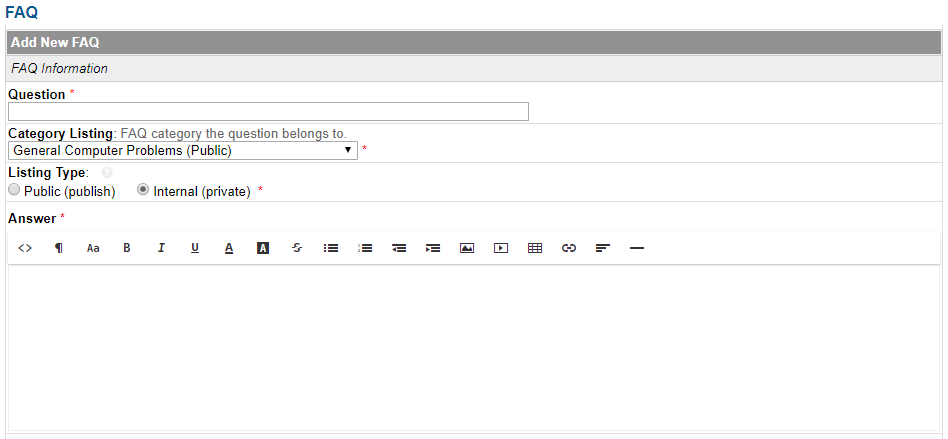


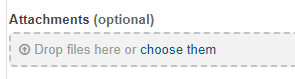
2. Once you have chosen or created your category, on the “**FAQ”** page, select the category you decided or created. On the next page, you will select “**Add New FAQ”** to add on to the list of Frequently Asked Questions.

****

3. From here, you must specify the question that is being answered. The category listing should be left the same as it is the category you originally selected, however if you made a mistake, it can also be changed from this page.

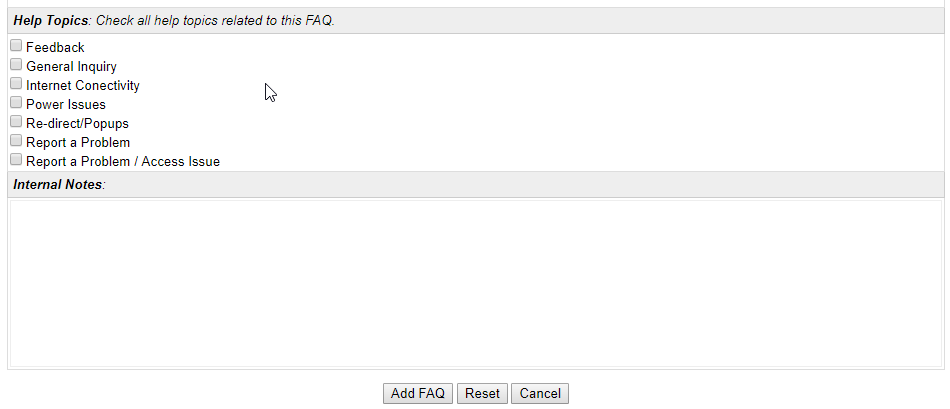
You can also choose whether the FAQ will be visible to customers (public) or only to technicians (internal). Is it information that a customer could find valuable? Or is it something more specific to technicians?



4. Attachments such as visual images would also give the customer that is not necessarily tech savvy more of an advantage on solving their issue. Technicians may also find images convenient such as when taking apart and putting back together any sort of device. However, attachments are entirely optional.

5. Lastly, you will select any help topics related to your FAQ. This is also completely optional but may help when the customer or technician is searching for something specific to that topic.

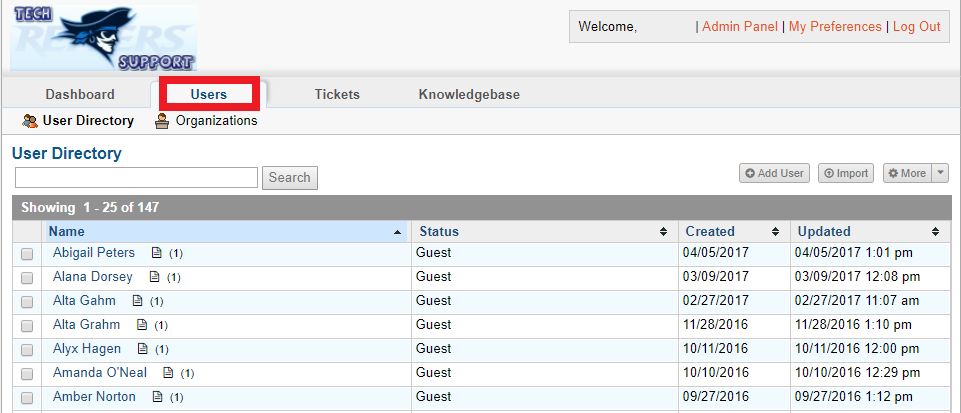
Internal notes can also be left to any future technician from here as well. Once all your FAQ information is in order, click "**Add FAQ”**



# 

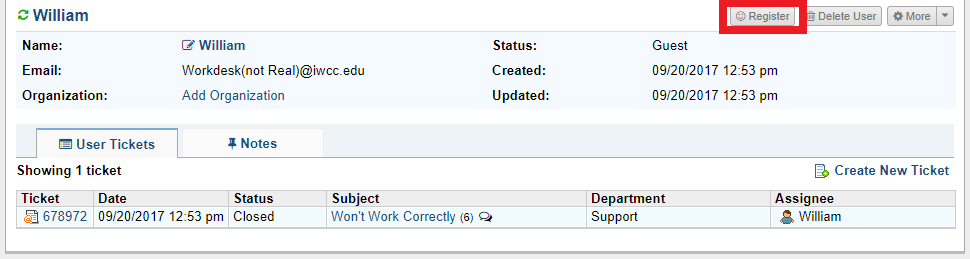
# Setting up new users

Sometimes a customer may have more issues in the future and decide to come back. By creating a user account for them, it’ll speed up the process of submitting a ticket. The **“Users”** tab houses all of the user’s guest and registered accounts in the system.

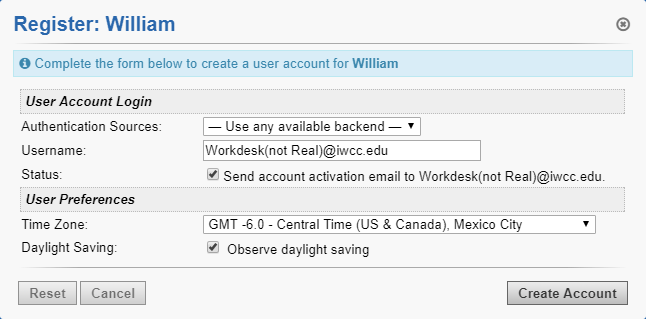


As you’ll notice, plenty of these accounts are “**Guest”** accounts as an account is made for each person that makes a ticket. It is not required to have a registered account but is recommended for frequent customers.

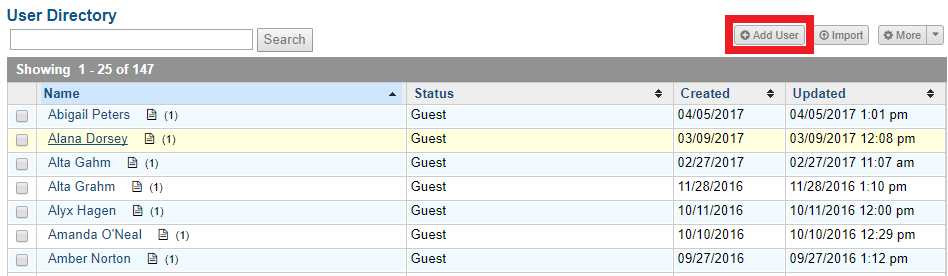
To register an account already in the system, click on the user you would like to register, and click “**Register”** in the top right.



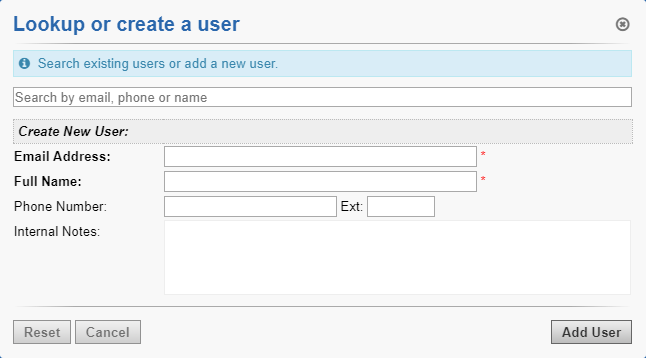
This will bring up a window to which you can create the user’s username and create their new account.



If by chance the user is not in the system, you can set up a new user by scratch by clicking on “**Add User**” from the User Directory.



This will bring up a window in which you will provide the user’s Email Address, Full Name, Phone Number, and any internal notes on the user.



# Ticket Assignment Policy

As tickets are made, the must be assigned to a technician in order to be resolved and closed. But what technicians will take what tickets? This may also be a matter of which technician is trained in what areas, otherwise known as specialists. One technician may know more about hardware problems than others, hence, they would receive a hardware issue ticket.

As we do not have an automatic ticket assignment process available, the ticket should be submitted without assignment and allow all agents to provide input and decide ticket assignment. It will also allow the technician with better knowledge about a certain topic to claim the ticket rather than have it automatically assigned to another technician that may not know as much.

This method requires all analysts to be alert to when a ticket comes in as to not dissatisfy the customer. Tickets should be monitored by a supervisor to assure they are being claimed by technicians in a timely manner.

# Customer Communication Policy

It is important to remain courteous, friendly, and maintain a spirit of helpfulness with each customer. It is mandatory that each technician show maximum respect towards their fellow technicians and customers alike.

* Conversations or communications about company crisis via email and text is prohibited.
* When answering any anticipated questions use the rule of who, where, what, when and why.
* Remember to follow up with the customer when a response is expected.
* All technicians must strive to maintain a professional and civil work atmosphere at all times and refrain from shouting, yelling, or swearing at co-workers and customers.

Inappropriate remarks that discriminates any protected classification including age, race, color, religion, sec, national origin, disability, genetic information, sexual preference and even weight is prohibited and will result in immediate termination.

# Backup Policy

To protect against any event that may cause a loss in data, such as physical disaster or data corruption, the help desk requires a periodical backup of all data. The purpose of this policy is to define the minimum controls required for data backup and to safeguard against the loss of data that may occur due to physical disaster, human error, and software or hardware corruption. This policy applies to all technicians who process or store data within the servers.

There are plenty of different backup options, however, they can only be done at specific times. A **Full Backup** includes all files of a defined set of data. This copies all files, regardless of whether they have been modified or not. This will set the base for the differential and incremental backups. A full backup will only be done once a week to avoid service interruption, followed by differential and/or incremental backups during the week.

An **incremental backup** captures only the files changed since the last incremental backup. This means the next time an incremental backup is done, the file is skipped unless it has been modified again. This backup option ensures your backup is up to date and saves both time and storage space.

A **differential backup** captures only the files that have changed since the last full backup. It will continue to backup files that have changed or added since the last full backup. This requires more storage space, but ensures a smoother, easier, and more reliable restore.

# Customer Satisfaction Survey

We want to know what you think! Please provide feedback on your experience and help us improve our service.

**On a scale of 1 - 5 (1 = low, 5 = high) please rate the following.**

**Please use NA for any question that is not applicable.**

\_\_\_\_**The availability of help desk staff/ability to reach them in a timely manner?**

\_\_\_\_**The speed in which your question or incident was resolved?**

\_\_\_\_**The timeliness of updates regarding the status of your issue?**

\_\_\_\_**The quality of service you received?**

\_\_\_\_**The friendliness of the analyst(s) that assisted you?**

\_\_\_\_**The overall service you received?**

**Do you have any extra comments, suggestions, or concerns?**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**If you would like to be contacted again by a manager, please provide an email or phone number. (Optional)**

**Email** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Phone number** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Glossary

**24/7 Support**- Service desk services that are provided 24 hours a day, 7 days a week

**Abandon rate percent-** The percentage of abandoned calls compared to the total number of calls received

**Abandoned call-** A call where the caller hangs up before an analyst answers.

**ACD Supervisor Console-** A system that works with ACD systems and enables supervisors to monitor call volumes and the performance of individual service desk analysts or groups of analysts.

**Automatic Call Distributor (ACD) -** Technology that answers a call and routes, or distributes, it to the next available analyst. If all analysts are busy, the ACD places the call in a queue and plays a recorded message, such as "We're sorry, all of our service representatives are currently assisting other customers; your call will be answered in the order it has been received."

**Automatic Number Identification (ANI)** - A service provided by a long distance service provider that delivers the telephone number of the person calling.

**Avatar-** A computer user’s representation of himself/herself

**Best-in-class-** A company that is the finest in its relative industry peer group. For example, a best-in-class manufacturing company is considered excellent by its customers when compared only to other manufacturing companies.

**Benchmarking-** The process of comparing the service desk's services, standardized metrics, and practices to those of a rival or world class company in an effort to identify ways it can improve.

**Business Process Management (BPM)** - A systematic approach to improving an organization's business processes.

**Beginning of Day (BOD)** - A list of tasks an analyst performs at the start of each workday.

**Customer Satisfaction**- The difference between how a customer perceives he or she was treated and how the customer expects to be treated.

**Customer Service-** Services that ensure customers receive maximum value for the products or services they purchase.

**Customer Support-** Services that help a customer understand and benefit from a product's capabilities by answering questions, solving problems, and providing training.

**Configuration Management Database**- A database that is used to store configuration records throughout their lifecycle.

**Configuration Management System-** A set of tools and databases for managing IT asset information and linking that information to related incidents, problems, known errors, changes, and releases.

**CompTIA A+** A certification that measures a technician's knowledge of hardware and operating system technologies and concepts, along with topics such as security, safety and environmental issues, and communication and professionalism.

**Dispatch-** To send or route

**Dialed Number Identification Service (DNIS)-** A service that provides the number the person called when they call using a toll-free number or a 1-900 service.

**Email-response management system**- A system that enables service desks to manage high volume chat, e-mail, and Web form messages.

**Ergonomics-** The science of people-machine relationships that intended to maximize productivity by reducing operator fatigue and discomfort.

**Follow the sun**- A service desk approach that enables an organization to provide 24-hour coverage by having regional service desks working only during the usual business hours for their location.

**Fax-** An electronic device that sends or receives printed matter or computer images.

**First call resolution rate percent-** The percentage of calls resolved during a customer's initial telephone call compared to the total number of calls received at the service desk for a given period of time.

**Homegrown incident tracking system**- Technology that tends to support only the incident management process and offers basic trouble ticketing and reporting capability.

**Information Center-** A forerunner of the help desk; a place within a company where employees could receive training and help using personal computers.

**Information Technology Infrastructure Library (ITIL)**- A set of best practices for IT service management

**Inbound call center-** A call center that receives telephone calls from customers and may answer questions, take orders, respond to billing inquiries, and provide customer support.

**Incident Management**- The process responsible for managing the lifecycle of incidents.

**International Organization for Standardization-** A network of the national standards institutes of 157 countries; also known as ISO.

**ISO 9000-** A set of international standards for a quality management.

**ISO/IEC 20000**- An international standard for IT service management

**Knowledge management system (KMS)-** A set of tools and databases that are used to store, manage, and present information sources such as customer information, documents, policies and procedures, incident resolutions, and known errors.

**Key performance indicator (KPI)**- A key metric used to manage a process.

**Level one analyst**- A person who receives and logs contacts, answers questions, and resolves incidents and service requests when possible; also called service desk analyst, customer support analyst, or service desk technician.

**Level one specialist**- A person who researches complex incidents and handles service requests that require more skill or authority - or, in some cases, more time - than a level one analyst typically can devote to a single contact; also called service desk specialist, technical support specialist, or customer support specialist.

**Occupational Safety and Health Administration (OSHA)-** An agency of the U.S. Department of Labor that is dedicated to reducing hazards in the workplace and enforcing mandatory job-safety standards; also implements and improves health programs for workers; located on the Web at www.osha.gov.

**Request for change (RFC)-** A request to change the production environment

**Service desk**- A single point of contact within a company for managing customer incidents and service requests.

**Service Level Agreement (SLA)**- A written document that spells out the services the service desk will provide to the customer, the customer's responsibilities, and how service performance is measured.

**Six Sigma-** A disciplined, data-driven approach for eliminating defects in any process.

**Voice over Internet Protocol (VoIP)-** A technology that translates voice communications into data and then transmits that data across an Internet connection or network.

**World Wide Web (WWW)-** A collection of documents on the Internet with point-and-click access to information that is posted by government agencies, businesses, educational institutions, nonprofit organizations, and individuals around the world.

# Project Resources

## **Email Policy**

McCrea, Bridget. “National Precast Concrete Association.” *National Precast Concrete Association.*, 10 Sept. 2015, precast.org/2015/09/implementing-email-usage-policies-in-the-workplace/.

Heathfield, Susan M. “A Sample Internet and Email Policy for Employees.” *The Balance*, 14 Jan. 2017, [www.thebalance.com/internet-and-email-policy-sample-1918869](http://www.thebalance.com/internet-and-email-policy-sample-1918869).

## **Customer Communication Policy**

Dunn, Kelly. “Sample Communication Policy.” *WorkForce Magazine,* 14 Apr. 2000, <https://www.workforce.com/2000/04/14/sample-communication-policy/>

## **Backup Policy**

Wermter, Pete. “Choosing Between Incremental & Differential Backup.” *Acronis,* 27 Mar. 2016, <https://www.acronis.com/en-us/blog/posts/tips-tricks-better-business-backup-and-recovery-world-backup-day>