San Joaquin Valley Unified
Air Pollution Control District
Information Technology Services

TAS Procedures and Guidelines for IT Analysts

Introduction

The purpose of this document is to provide Technical Assistance System (TAS) procedures and guidelines for Network, Communication and Programmer Analysts. TAS is a problem tracking system where end users put in technical problems or requests (cases) that are assigned to Analysts. TAS cases have the information Analysts need to start working on the case and the Analyst populates the case with more information (comments) as it is being worked. TAS cases and comments are viewable by everyone; comments can be put into the system by Analysts or the end user. Old comments are saved in the case so that the history of the case can be easily viewed. Customer service is a very large part of ITS' function in the District, and TAS is the lynchpin of our customer service commitment. Without TAS our high customer service standards would be difficult to maintain and even harder to improve. This document seeks to establish the guidelines we use to maintain our service level and determine the success of our customer service goals.

Creating TAS Cases

TAS cases are normally created by end users to request assistance from the ITS group. End users should be encouraged to enter every service request into TAS, but if the end user does not, then the Analyst working the end user request should enter the TAS case. TAS cases are also created by Analysts to keep track of break/fix problems or set up tasks not initialized by end users. TAS cases usually fit into two categories: break/fix cases and set up cases. Break/fix cases consist of 'problems', issues with technology systems not working as they should or issues with training end users on how our systems can be a solution for them. Some examples of break/fix cases: A user cannot logon to their system, a user says a printer is streaking paper as it prints, or a user doesn't know how to create rules in outlook. Set up TAS cases consists of initial user set ups and changes to user set ups. Some examples of set up cases: Setting up a new employee's phone and Active Directory user id, disabling a separated employee's accounts, and setting up a promoted employee with access to the Evaluation Tracking System.

Sometimes TAS cases will be created that may not fit one of those two categories, in those cases supervisors and/or management will move those cases to the appropriate tracking system and close the TAS case. In some special cases the item will be kept in TAS to be worked under the TAS service guidelines.

TAS Case Note Guidelines

TAS case notes are a tool to communicate with the end user and management the status of the case, and a tool for the Analyst to keep organized while working the case. TAS case notes are a crucial customer service tool for the Analyst. The end user can read the case notes to see the status of the case or to directly communicate with the Analyst. End users can add their own TAS case notes, if they choose to communicate with the Analyst in that way. Because end users read the case notes, Analysts need to be aware of the tone and the content of the case notes. Be positive whenever possible and always maintain a business-like and professional demeanor in your written communication. Do not include sensitive information in case notes such as user ids, passwords, etc…

Note that all important communications with the end users along with significant events regarding the case must be documented in a case note. Important communication may be by face to face interaction, phone calls, and emails or by other methods. The case note history must provide a complete record of all important communications with end users and analysts must never rely on other systems such as email to track case history.

Analysts should <u>at least</u> convey three things to the reader of the case note history: 1) What is/was done on this case. 2) What is the next step in this case. 3) When is the next step expected to be completed. Often much more is conveyed in the case notes, such as direct communication with the end user, data needed for the case, records of communication with the end user etc…

When a TAS case involves printer repairs, make sure that at least one case note contains somewhere in it a short text string identifying the nature of the problem, and the printer's hostname or designation. The standard string of text should be:
Region (if necessary) **– Hostname – Action**
Examples:
"ITS4350A – fuser replacement"
"BAK – PER5500A – error 60.15.04"
"MOD – COM4350B – toner replaced"

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Working TAS Cases and Service Guidelines

The Analyst works TAS cases with the following time guidelines.

1) Every TAS case is assigned to an Analyst within 24 hours of the case opening.
2) The assigned Analyst communicates with the end user and puts in the first case note within 48 hours of the case opening.
3) The status of the case is updated with a new case note at least once every seven days.
4) The case is closed within 14 days of it being opened.

Every TAS case is assigned to an Analyst within 24 hours of the case opening.

Supervisors and management assign open cases throughout the day but Analysts should self-assign cases whenever possible.

The assigned Analyst communicates with the end user and puts a case note in within 48 hours of the case opening.

The Analyst will make the effort to communicate with the end users within 48 hours of the TAS case opening and record it in a case note. Communication is defined as an email, phone call or personal visit. A record of the communication attempt should be entered as a case note if not immediately successful.

The status of the case is updated with a new case note at least once every seven days.

The Analyst will enter a case note at least once every seven days. Read the "TAS case note guidelines" section of this document for direction in writing case notes.

The case is closed within 14 days of it being opened.

The case is to be completed within 14 days of it being opened. Sometimes cases will take longer than 14 days, but this is the exception. Cases are closed when the customer agrees that the issue was resolved to their satisfaction. A case note indicating communication with the end user who opened the case should be entered before closing every case. Remember that communication and agreement between you and the end user is what you are after when you close a case.

Tracking TAS Metrics

TAS case history and exceptions to our service guidelines are tracked by ITS management daily. If you would like to see if you have a case in the exception list go to the 'Reports' menu on the TAS program then select the 'exception item' report.

Communicating with End Users

Communication is one of main reasons the TAS system is successful. Sometimes it may be difficult to communicate with end users and that may make the TAS case take longer than necessary. Communication with the end user can be initiated via email, phone or face-to-face contact. Do not attempt to use the same communication method if it continues to fail, sometimes more than one communication method is needed to reach the end user. Good customer service means understanding that end users are not all the same, and we must try to find out what works best for them to complete the case.

If you are unable to contact the end user in three contact attempts using at least two of those three communication methods in a period of at least three days then bring this case up with your supervisor for direction.