



Help Desk Reference Guide

Last Revised:

10/28/2005

REVISION CONTROL

Document Title: CSU-CI Help Desk Reference Guide
Author: Joseph Dobzynski, Jr. – Department of Information Technology
File Reference: CSU-CI Help Desk Reference Guide.doc

Date	By	Action	Pages
10/28/2005	Joseph Dobzynski	New Document Created	All

Review/Approval History

Date	By	Action	Pages

This document will help file all help desk tickets for production and non-production support.

Table of Contents

	Page
1.0 Purpose	4
2.0 Procedure.....	4
3.0 Examples.....	4
4.0 Classification	5
5.0 Additional Items.....	6
6.0 Other Actions.....	7
7.0 Glossary	8

1.0 Purpose

The CSU-CI Help Desk Reference Guide assists submitting help desk tickets for enterprise applications. It helps ensure all the necessary data is provided with each ticket for proper classification and routing. It also helps ensure all information is available for an effective initial investigation. Help desk tickets are used to track recurring errors, discover chronic problems, and suggest potential system or business process enhancements.

2.0 Procedure

Help Desk tickets are submitted either by email (HelpDesk@csuci.edu) or by phone (x8552). Each ticket should contain basic information about the system requiring support (classification) and additional information based upon the nature of the request (additional items). The Help Desk will request any missing items outlined in this document to ensure the information is there. Providing this information in a straightforward manner will help route your request quickly to the CMS Applications Team for resolution and completion.

3.0 Examples

Here is an example of a good help desk ticket. It gives a brief summary of the request at the top, classifies the request, and provides the additional items necessary for its completion. The Help Desk would forward this immediately to the CMS Applications Team.

"I need an extract of financial aid information from PeopleSoft to assist in processing aid. This should likely go to Joseph Dobzynski.

[Classification]

Type: Enterprise Applications

Subtype: PeopleSoft/CMS

Category: SA - Financial Aid

[Additional Items]

Action Required: CMS - Extract Request

Target Database: Production/HCIPRD

Requested Population: All current rows for Aid Year 2006 found in STDNT_AID_ATRBT

Requested Fields: EmplID, Last Name, First Name, Email, Application Status, Processing Status, Packaging Method, SAP Status, Last Update Date/Time

Data Navigation: Various navigations - can provide more information other than table if needed.

Timeline: 9/26/2005

Recurrence: One-time, but may need it again."

Here is an example of a bad help desk ticket. It provides no routing information and provides very basic information. The Help Desk would contact the user to gather more information.

"Student John Doe, ID 123456789, has 2 application checklists. Could one be deleted?"

4.0 Classification

Use the following table to classify your request. Provide the likely analyst if you know who will receive this request.

Type	Subtype	Category	Primary Analyst
Enterprise Applications	IDWorks	N/A	Nasser Mansour
	PeopleSoft/CMS	CI - Custom	Joseph Dobzynski
		Fin – Accounts Payable	Neal Fisch
		Fin – Budgets	Neal Fisch
		Fin – General Ledger	Neal Fisch
		Fin – Purchasing	Neal Fisch
		HR – Administer Workforce	Neal Fisch
		HR – Develop Workforce	Neal Fisch
		HR – LCD	Neal Fisch
		HR – Recruit Workforce	Neal Fisch
		HR – Self-Service	Neal Fisch
		HR – Time & Labor	Neal Fisch
		PT – Data Access	Angela Stockmon
		PT – Database	Angela Stockmon
		PT – System Access	Angela Stockmon
		SA – Advisement	Guy Timpanaro
		SA – Academic Structure	Guy Timpanaro
		SA – Admissions	Joseph Dobzynski
		SA – Campus Community	Joseph Dobzynski
		SA – Financial Aid	Joseph Dobzynski
		SA – Student Financials	Neal Fisch
		SA – Student Records	Guy Timpanaro
		SA – Transfer Credit	Joseph Dobzynski
	Pharos	Card Vending Station	Nasser Mansour
		Pharos Admin	Nasser Mansour
		Pharos Reports	Nasser Mansour
		PS20 Terminals	Nasser Mansour
		Vending Cash Acceptor	Nasser Mansour
	Resource 25	N/A	Guy Timpanaro
	Singularity	AnyDoc	Angela Stockmon
		Hershey	Angela Stockmon
		Singularity	Angela Stockmon
		OCR	Angela Stockmon

5.0 Additional Items

Use the following table to provide additional information for your help desk ticket. If what you need does not appear in this table, please provide as much information as possible.

Action Required	Information Needed
CMS – Data Cleanup	Target Database Affected Population
CMS – Database Refresh	Target Database Source Database
CMS – Extract Request	Target Database Requested Population Requested Fields Navigation Timeline Recurrence
CMS – Login Issue	Target Database Affected UserID
CMS – Process Error	Target Database Affected Population Navigation Performed Actions Affected Instance Number Received Errors
CMS – Query Request	Requested Population Requested Fields Navigation Timeline
CMS – Report Request	Requested Population Requested Fields Navigation Timeline
CMS – Security Request	Target Database Affected UserID (If Available) Completed CMS Security Form
CMS – System Error	Target Database Affected Population Navigation Performed Actions Received Errors
CMS – System Question	Target Database Navigation Performed Actions
Pharos – Cost Center Change	Affected Cost Center Completed Pharos Configuration Form
Pharos – Pop-Up Install	Affected Computer Location Affected Computer Platform

Action Required	Information Needed
Pharos – Report Request	Requested Report Timeline Recurrence
Pharos – System Question	Affected User/Cost Center/Computer/Copier
Pharos – User Maintenance	Affected User Completed Pharos Configuration Form
Singularity – System Error	Navigation Performed Actions Received Errors
Singularity – Template Creation	Requested Template
Singularity – User Support	Navigation Performed Actions Received Errors

6.0 Other Actions

The CMS Applications Team also uses the Help Desk to track internal requests. These requests are discussed with departments before they are added to the Help Desk queue. These tickets are submitted by the CMS Applications Team with a module lead as the requestor. Do not submit these tickets, but rather directly contact the CMS Applications Team to discuss these support needs.

Action Required	Information Needed
CMS – Apply Baseline Patch	Baseline Update/Fix
CMS – Apply Baseline Release	Baseline Release
CMS – Configuration	Requested Configuration
CMS – Enhancement Proposal	Proposed Enhancement
CMS – Training	Requested Training
CMS – Upgrade	Oracle/PeopleSoft Upgrade Version
Pharos – Training	Requested Training
Singularity – Training	Requested Training

7.0 Glossary

Use this glossary of terms to help provide the necessary information.

Affected Cost Center – The Pharos cost center (account string) that will be affected by this request.

Affected Instance Number – The instance number assigned to the process that did not produce the expected results.

Affected Population – The population of data elements that will be affected by this request. This should be as narrow as known (e.g. Fall 2006 First Time Freshmen Applicants)

Affected User ID – The user ID (e.g. joseph.dobzynski) that will be affected by this request.

Affected Computer – The workstation that will be affected by this request. The location of this workstation should also be provided.

Affected Copier – The copier that will be affected by this request. The location of this copier should also be provided.

Completed CMS Security Form – All security requests require a completed and signed CMS Security Access Form. This form is found on the CSU-CI CMS website (<http://www.csuci.edu/cicms/>).

Completed Pharos Configuration Form – All Pharos charging changes require a completed and signed Pharos Configuration Form. This form is found on the CSU-CI Procurement and Support Services (<http://www.csuci.edu/campserv/finance/>).

Computer Platform – The platform (Windows, Mac) of the computer affected by this request.

Navigation – The navigation taken that caused the error or the location of the data for a particular request. For PeopleSoft issues, it would resemble (Home > Develop Enrollment > Process Applications > Use > Application Maintenance). For Singularity issues, it would be the menus used that caused the process errors.

Performed Actions – All relevant actions taken in the business process that may have caused this error. This information is critical to determining why a particular error occurred.

Received Errors – Screen shots or process logs of all errors received that pertain to this request. Please note in your email that they are in an attached document.

Recurrence – Any recurrence information for a particular extract or report request. This will help the CMS Applications Team place recurring tasks in Outlook to remember to run your process.

Requested Fields – The requested fields for the extract or query request. Please provide the navigation to this data if you are not sure where the data is located.

Requested Report – The requested report to be run by the CMS Applications Team. This relates mainly to Pharos users.

Requested Template – The requested template to be developed by the CMS Applications Team. This relates mainly to Singularity users.

Source Database – The database from which the data migration or database refresh will originate.

Target Database – The database that will be affected by this request. This will be the database to which a data migration or database refresh will occur. The following databases are used by CSU-CI.

- Development (H8CIDVL, F8CIDVL)
- Configuration (H8CICFG, F8CICFG)
- Testing (H8CITST, F8CITST)
- Staging (H8CISTG, F8CISTG)
- Training (H8CITRN, F8CITRN)
- Release (H8CIRLS, F8CIRLS)
- Quality Assurance (H8CIQA, F8CIQA)
- Production (HCIPRD, FCIPRD)

Timeline – The timeline by which this request must be completed. Please be as specific as possible and provide actual dates whenever possible. Please do not use terms such as “as soon as possible” or “immediately” unless it is absolutely required. If this request is not time specific, please note that in your request.