# CTCLINK SUPPORT
# STANDARD OPERATING PROCEDURES

## Purpose

The ***Standard Operating Procedures for ctcLink Support*** provides detailed procedures for Washington State Board Community and Technical College ctcLink support representatives from Application Services, ctcLink Customer Support, Data Services, and Project Management to adhere to the ***ctcLink Service Level Agreement*** (SLA) when resolving tickets.

This document provides the process and standards of how to respond to ctcLink tickets so that each customer will have an experience consistent with ***the ctcLink Service Level Agreement.***

Instructions are specifically for the Washington State Board Community and Technical College ctcLink support representatives, both functional and technical teams, assigned to resolve tickets.

This is a dynamic, living document to be revisited based on evaluation results, the deployment of additional colleges, ticketing system, and changes to the ***ctcLink Service Level Agreement***.

## Scope

The scope of this ***Standard Operating Procedures for ctcLink Support*** is outlined in the ***ctcLink Service Level Agreement***, in the service elements, standards, and responsibilities sections. This document provides the ctcLink support representative responsibilities, customer's prerequisites of ticket submission, and procedures to resolve tickets related to ctcLink.

## ctcLink Support Representative Responsibilities

- Provide responses and resolution within the timeframes outlined within the Severity Level table within the ***ctcLink Service Level Agreement***
- Provide knowledgeable, effective and respectful service
- Strive to ensure customer satisfaction
- Request feedback for opportunities for improvement
- Group or split tickets as appropriate
- Communicate ticket status information with impacted customers (e.g. Referenced or linked ticket update information should be visible to ticket originator)
- Document problem resolution and status in tickets
- Maintain web-based customer self-service knowledge base
- Triage tickets effectively and timely
- Maintain awareness of downstream workflow
- Protect restricted data
- Deliver services with minimal interruptions
- Restore normal operations with as little disruption to customers as possible
- Build and maintain lasting relationships with customers
- Develop and implement strategies to resolve recurring incidents

- Timely notification of tasks requiring customer involvement
- Record all problems
- Notify users of commitment times and any problems that occur in meeting the established response times
- Read all ticket information thoroughly

## Customer Prerequisites

Before submitting a ticket, the customer will perform initial troubleshooting as outlined in each college's support plan, including reviewing the issue by the college's pillar lead or business analyst when necessary. If the issue cannot be resolved, the designated person at the college will submit a service ticket outlining the issue and identifying a priority level for the college. After the ticket is submitted, the ticket is automatically routed to the appropriate ctcLink support representative in the functional or technical team based on the information in the ticket.

- Initial troubleshooting follows College's Tier One support process and may include the following:
  - Clear browser cache and try again
  - Try a different browser
  - If Finance related incident, check budget status
  - Verify correct Chartfield string
  - Login with correct information
  - Utilize Canvas Training Courses and ctcLink Reference Center (global resources) for pillar areas and/or departments
- College affirms the issue/request must be escalated to the SBCTC ctcLink Support
  - Research the issue first, using resources like ctcLink training and instructional tools or campus-based subject matter experts
  - Review issue by college's pillar lead or business analyst, when necessary
  - Confirm the issue is ctcLink and not caused by program, policy, or local business process

## Procedures to Resolve ctcLink Tickets

The ctcLink Support representative who receives the ticket will review the ticket and clarify any information needed with the customer. They will be responsible for designating a severity level to the ticket based on the information gathered from the ticket—including customer designated priority level—and consultation from others throughout ctcLink Support team. The initial response and time to resolution will occur within the expected timeframe per severity level. If the response time cannot be met, the customer will receive a status update as well as a plan to resolve the issue. The service ticket will not be closed until the customer reviews and agrees the ticket is resolved.

### *Customer sets priority level with ticket:*

When the customer submits the ticket, they will specify the issue/request as high, medium, or low using the following criteria:

- **High** – One or more pillars is not functioning. The issue is stopping the college from serving students or staff and/or is not able to do major functions, such as run payroll.
- **Medium** – Work can continue, but the work is impaired. Production is able to proceed, but in a significantly impaired fashion.
- **Low** – Does not impact productivity, but would be an improvement to productivity or not time-sensitive. (This is different than an enhancement request.)

### *ctcLink Support Representative (both Functional and Technical) Receives and Resolves Tickets:*

A. The first response should involve the following:

1) Review the ticket.

2) Identify missing information.

3) Assign a severity level in conjunction with the college's selected priority level.
**Note**: The ticket(s) will come in with an internal severity level of "Low", this severity level will then need to be updated to one of the following:

a. **System Down**: ctcLink environments are unavailable (Corresponds with customer priority level of "High.")

b. **Critical**: Organization(s)-wide productivity is halted. A threat to data security data breach. The college is no longer able to fulfill its mission. (Corresponds with customer priority level of "High.")

c. **Urgent**: High-impact problem where production is proceeding, but in a significantly impaired fashion; OR There is a time-sensitive incident important to long term productivity that is not causing an immediate work stoppage; or there is significant number of customers concerned. It is impacting a large number of people. (Corresponds with customer priority level of "Medium.")

d. **Important**: Important incident that does not have significant current productivity impact. (Corresponds with customer priority level of "Low.")

e. **Information Request**: Request for information only. (Corresponds with customer priority level of "Low.")

**NOTE**: If the customer's priority ranking and ctcLink support representative's severity level do not align, the ctcLink support representative must provide an explanation regarding the discrepancy using the rationale/language of the definition for severity level found in the ctcLink Service Level Agreement, Severity Level Descriptions table, also found in Appendix A. (For example, the customer prioritizes the issue as "High," and the ctcLink support representative prioritizes it as "Urgent," the first response time should be within 2 business hours with an explanation as to why the ctcLink support representative classified it as Urgent and not "critical" or "system down.")

4) Initial response to the customer must be made in the Notes section within the timeframe consistent with the severity level assigned by the ctcLink support representative:

a. **System Down**: Immediate

b. **Critical**: Within 30 minutes

c. **Urgent**: Within 2 Business hours

d. **Important**: Within 1 Business Day

e. **Information Request**: Within 3 Business Days

5) The initial response in the Notes section will include the following:

a. Severity level;

b. If needed, explanation of any discrepancy between the customer's priority ranking and ctcLink support representative's severity level;

c. Relevant follow-up, such as requests for additional information;

d. Clarifications of issues;

e. Whether the ticket is triaged to another ctcLink support representative, such as technical support;

f. Whether the ticket is linked with another ticket;

g. Whether the ticket needs to be split; and/or

h. Identification of next steps.

i. Check the box "Visible to Client" and select "Save and Send."

B. Provide regular updates to the customer regarding the progress of their ticket using the Note function. More communication is better than less communication. Be sure to change the status to reflect the progress of the ticket as the ticket is getting resolved.

1) Document the following in the Notes section as circumstances change:

a. Conditions,

b. Progress,

c. Issues, and

d. Set-backs.

e. If the resolution is not possible within the expected resolution time, provide a report to the customer in the Notes section outlining the cause for delay in resolution, next steps, and timeline to proceed to resolution.

f. Check the box "Visible to Client" and select "Save and Send."

NOTE: Be sure that appropriate notes are visible to customer by checking the box "Visible to Client" and selecting "Save and Send." It is important for the customer to receive regular updates.

2) Regularly review and update the status of the ticket. The status must always match the work that is happening. **Select "Save and Send" every time the status changes to ensure the customer receives the regular updates.**

a. **Open:** Ticket submitted or re-submitted based on a response from the customer/vendor.

b. **In Progress:** Actively working on ticket.

i. When the ticket is re-submitted from the customer/vendor, it will come back in "open" status. At this point the ctclink support representative should change the status back to "in progress" when they are actively working on the ticket.

c. **Pending Customer Response**: Waiting for the customer to respond. The status must change to "Pending Customer Response" every time the ctcLink support representative is waiting for the customer to respond. The Notes status must be used to state how the issue was resolved, request information, and affirmation the ticket has been addressed. Two common times this occurs:

i. Request additional information to work toward a resolution.

ii. State how the issue was resolved and request affirmation from the customer that the work has been completed and the ticket has been addressed. Refer to Resolved status below.

d. **Pending Vendor Response**: Waiting for a third-party vendor to respond, e.g., Oracle, CampusCE, HCX, etc.

e. **On Hold**: No longer actively working on the ticket because of extenuating circumstances, such as code freezes and enhancement requests. If this is the case, a brief report, as a Note, is provided to the customer outlining cause for delay, next steps, and timeline to proceed to resolution.

f. **Deferred**: The work is going to take longer to resolution than identified in the ctcLink Service Level Agreement based on severity level. If this is the case, a brief report, as a Note, is provided to the customer outlining cause for delay, next steps, and timeline to proceed to resolution.

g. **Merged**: When another open ticket is a duplicate issue to the ticket. Add the customer's email address to the other ticket to be sure they get the communication regarding progress to resolve the issue. Let the customer know their ticket has been merged with another ticket by using the Note function and checking the box "Visible to Client" and selecting "Save and Send."

   i. Use the **Linking function** when, the tickets are the same issue, from different users but is not a duplicate ticket.

h. **Resolved**: Resolved status can only be assigned consistent with the following criteria:

   i. In the notes the customer affirms that the ticket has been resolved, the ctcLink support representative changes the status to "Resolved." Within 24 hours, the ticket will automatically change to "Closed."
   ii. If the customer does <u>not</u> agree that the ticket is resolved, then the rationale, next steps, and other relevant information will be documented in the Notes section. The ctcLink support representative will change the status reflective of the next steps.

   iii. Please see exceptions to the customer affirmation component below.

ii. **Scheduled:** Work that is being pre-planned based on a specific timeframe.

i. **Abandoned:** The ctcLink support representative must reach out a total of three times, over the course of a three-week period. If there is no response from the customer after the third attempt, the ctcLink support representative should change the status to "Abandoned."

j. **Closed**: When the ctcLink support representative changes the status to "Resolved," the ticket system will automatically change the status to "Closed" after 24 hours.

### *Exceptions:*

There are a few exceptions, when a ticket is being resolved, that would not need to have the customers affirmation. Therefore, these types of tickets will be resolved automatically upon completion, by the ctcLink support representative.

- Creating or editing Item Types
- Creating or editing External Orgs
- Duplicate IDs
- Adding FSCM Chartfields (Account, Fund, Approp, etc.)
- Update Commitment Control/KK Budget Date
- Banking/Cash Management Security for Payment Dispatch
- When the resolution is
    - that local security administrator can resolve
    - a role needed for a query
    - to find a query for customer
    - asking the customer to make changes or adjustments in production
    - WebEx or Email with the customer and have affirmed the resolution

## Appendix A: Severity Level Descriptions

| Severity Level | Definition | College Examples | Target First Response Time | Target Time to Resolution (95th percentile) |
|---|---|---|---|---|
| System Down | ctcLink environments are unavailable. | One or more pillar is down, offline, or unavailable.<br><br>No one can log into ctcLink. | Immediate | 4 hours or less |
| Critical | Organization(s)-wide productivity is halted.<br><br>A threat to data security data breach.<br><br>The college is no longer able to fulfill its mission. | Payroll cannot be run at any or all institutions.<br><br>Financial Aid cannot be disbursed to all students at any or all institutions.<br><br>Students cannot register.<br><br>Not able to collect tuition.<br><br>Student financials cannot function.<br><br>Vendors cannot be paid.<br><br>Any Security failure in violation of FERPA and compliance/risk. | Within 30 Minutes | 4 hours or less |
| Urgent | High-impact problem where production is proceeding, but in a significantly impaired fashion.<br><br>OR<br><br>A time-sensitive incident important to long term productivity that is not causing an immediate work stoppage; or there is significant number of customers concerned. It impacts a large number of people. | Portions of payroll cannot be run at an institution. Financial Aid cannot be disbursed to some students at an institution.<br><br>Not meeting a deadline such as payroll.<br><br>The system is so slow that a 2 second task is taking 2 hours or more; i.e., performance degradation<br><br>Batch job is not functioning and matches require manual touch of every record. | Within 2 business hours | 1 business day or less |
| Important | Important incident which does not | Incident with a component in a module where the work | Within 1 business | 5 business days or less |

| Severity Level | Definition | College Examples | Target First Response Time | Target Time to Resolution (95th percentile) |
|---|---|---|---|---|
| | have significant current productivity impact | can still be completed, but short-term work around is available, but cannot be scaled.<br><br>Examples include entering student transcripts, leave approvals, ability to see faculty scheduled, dynamic role assignment, and notifications not working. | day | If the resolution is not possible within 5 business days, a report will be provided to the customer outlining cause for delay in resolution and next steps and timeline to proceed to resolution. |
| Information Request | Request for information only | Explanation request on a process<br><br>General question<br><br>Training request<br><br>Copy of a Sequel Query<br><br>(NOTE: Enhancements are a different process.) | Within 3 business days | 2 business weeks or less.<br><br>If the resolution is not possible within 2 business weeks, a report will be provided to the customer outlining cause for delay in resolution and next steps with timeline to proceed to resolution |

### *Exceptions*

In some cases, resolution of a particular incident may take longer than anticipated. When this occurs, the customer will receive regular status updates every three weeks.