Support Services Intake Process

The intent of this process is to approach this on a service-by-service basis, not by an entire area/group. If this process is to be applied to an entire area/group, then this will need to be applied iteratively across all services offered by that group.

1. New, Upgrade, Transition or End-of-Life - The same process is applied not only when a new Service is being brought onboard, but also when an existing Service undergoes a major upgrade or is being retired in favor of a replacement. Similar process is applied when a service is being transitioned from one state to another, but overall being retained as a service. Finally, a streamlined or abbreviated process can occur for end-of-life services.  
   For New Services: all elements of this plan process are mandatory.  
   For Transitioning (upgrading or changing) Services: all elements of this process should already be in place. Reviewing the Knowledge/Documentation (4), Common Issues/FAQs (5), and Support Training (9) is recommended.  
   For Retiring/End-of-Life Services: an abbreviated process is acceptable, mostly focusing around Support Training (9) and Go-Live (10) considerations. Communication, training for any relevant clean-up required as the Service is retired, and so on.
2. Service Owner, Service Manager and Business Owner - These roles must be identified for the service and cannot be part of the Service Desk role.
   1. Service Owner: the individual responsible for the service’s policies, strategy, and vision.
   2. Service (technical) Manager: the technical resource(s) responsible for the service’s routine functioning, maintenance, and in-depth troubleshooting.
   3. Business Owner: the individual(s) or department for whom the service is designed and run to facilitate their daily workflow. For example, Gargoyle’s business manager is the Registrar.
3. Service Catalog – The service **must exist** in the IT Services Service Catalog along with all options for the Service. This will provide public-facing information about Eligibility, Availability as well as providing Service Ownership information. Extensions to already existing services or functions, such as the Service Desk now being able to raise quotas for email, should be appended not to the Service Desk’s catalog entry, but to the relevant email system’s entry. *(Missing options are common now and lead to “shadow services” being requested ad hoc and having no documentation provided.)*
4. Knowledge/Documentation – Creation of both Internal and External (Client-facing) documentation in answers.uchicago.edu for the service and all options for the service. This documentation should cover all levels of Support as well as commonly anticipated support scenarios. When a client issue is encountered that is not addressed by existing knowledge/documentation, the Service Desk will gather required information and escalate to the next defined level for further assistance and resolution – this will also serve a dual purpose as input concerning missing/needed documentation. While the Service Desk may edit or update documentation as needed, Service Owner is under an obligation to provide relevant updates to documentation, not the Service Desk.  
     
   The Service Desk role is as an initiator/requestor/consumer of knowledge/documentation created collaboratively by resources identified/provided by the Service Owner and/or the next level/tier of Support. Documentation should be completed as part of the service’s rollout, transition, or retirement. Please plan to allow a review period by Support Services well in advance of any training or service go-lives.  
     
   The types of potentially useful knowledge and documentation include:  
   1. Known issues with the Service (if any): defects or flaws in the Service that is currently available to clients should be documented and passed to the Service Desk with any applicable workarounds. Known issues can come from testing, problems discovered during production use of the service, or client feedback.
   2. System requirements: if the Service Owner does not document or define which platforms and OSes are compatible with the service, compatibility with all common browsers and OSes supported by the Service Desk is assumed. If compatibility questions are encountered in the absence of any documented compatibility issues, they will be escalated for further assistance and resolution.
   3. Testing: the Service Desk strongly recommends testing be conducted before a Service is released to the community for use, and Service Owners are encouraged to provide the Service Desk an opportunity to test the Service in advance.
5. Common Issues or “FAQs” – As part of the knowledge transfer or documentation, Service Owners should provide the Service Desk with a “frequently asked questions” list of common questions and answers. The Service Desk recommends a minimum of ten concise questions and answers, up to a maximum of up to twenty five. While there are currently no set time-limits for contact length, the average time for a Service Desk interaction, including time to properly log/escalate, is approximately 10-15 minutes (highly variable by contact method and type of issue). The common issues/requests expected should be those that can generally be addressed immediately at the Service Desk level.
6. Service Requests – If the Service supported also has Service Requests associated with it, self-service methods are encouraged: ServiceNow catalog forms, web forms, and incident tickets are all ways to accomplish this. If approved by the Service Desk Manager, the Service Desk can assist with fulfilling basic, non-batched requests, as long as proper tools, access, and training are provided.
7. Escalation Levels/Paths – Each Service must have an escalation path established in advance of the Service Desk beginning its support of the Service. The recommended path is via an assignment group within Service Now. Service Owners should consider if a “live” escalation contact is required: phone and/or chat may be proper media for this. Criteria must be established by the Service Owner and Service Desk manager for when an escalation is appropriate. If there are multiple levels or types of escalation for one Service depending on the type of issue, these must all be clearly defined.  
   Remember that the Service Desk has broader hours than typical 9:00am – 5:00pm business hours, and that escalation methods must function both during and outside business hours. Undefined escalation levels/paths will result in ticket escalations to the Service Owner directly from the Service Desk.
8. Support Types Available from the Service Desk and Desktop Support – The Service Desk and the associated Desktop Support group offer different kinds of support at different cost points. Types of available support include: standard Service Desk support (Phone, Email, Chat), TECHB@R support (walk-in), Desktop Support (desk-side) or VIP support (24x7 on-call) are options available. Support outside of regular operating hours of the Service Desk is *not* included in any of the above choices. VIP support is not available for all Services and is usually determined by the client affiliation with the University or Business partner.  
   Depending on the desired type of support for the Service, resource allocations may need to be considered. Special support requirements should be noted and described.
9. Support Training - Internal Support team training time will be needed in advance of formal go-live. The Service Desk recommends the Service Manager meet to train the Service Desk staff on the identified Common Issues, FAQs, and routine Service operational tasks. Client training, or “train the trainer”-style classes for the ITS Training group, may also be considered if the service is complex or the Business partner using the service wishes to control training and access to the Service.
10. Go Live – When a Service is ready for its release, transition, or retirement, a final check its go-live list to ensure all elements are in place for the Service Desk is critical. If missing elements are major and will impede ability to provide quality support pre the prior agreement, then the go-live may be postponed until all elements are in place and clearly defined. Failure to do so may result in sub-optimal support and a negative client experience.