ACF Overview

HQ Site

FERC will be deploying a Backup to Disk (B2D) strategy at Headquarters to help speed backup and recovery times as well as provide enhanced protection of backup copies. A fibre channel based EMC CLARiiON Disk Library (CDL) will be added to the Cisco fabric for this purpose. The CDL emulates tape and is non-intrusive to the Legato Networker backup application. Multiple libraries, tape drives and cartridges can be configured for emulation through Networker just as standard automated tape libraries would be set up. The CDL is built on CLARiiON disk technology and is very similar in architecture with the exception of the "server engines". The server engines run tape emulation software and interface with the backup application as well as the back end Storage Processors on the CLARiiON that control the disk drives. The DL720 will have (2) server engines that run the tape emulation software (hence 702 model name). They will be configured in Active/Passive mode for redundancy and licensed with Active Engine Failover software. There will be (6) Disk Array Enclosures (DAE's) that will house a total of (90) 500GB 7,200 RPM Serial ATA Drives. This configuration is based on 8TB per week of full and incremental backups at FERC to be retained for a period of one month on the CDL and then staged to tape. To incorporate this into the Legato Networker backup software configuration, FERC will be licensed with (2) Networker Autochanger Software modules 1-512 slots in order to emulate the (2) ATL P4000 physical tape libraries that the CDL will be emulating. EMC has recommended adding a minimum of (5) Networker Power Edition Storage Nodes for Windows to be licensed on (5) SAN attached servers that are to be Government Furnished Equipment (GFE). EMC has provided host bus adapters and fibre channel cables for this effort. The Storage Nodes will further offload the LAN from traffic during backups, leverage the storage network and provide best performance for sequential reads and writes to and from the CDL. EMC also recommends SAN attaching the Networker server to the Cisco fabric as well as the second ATL P4000 library (replacing a SCSI attachment). Fibre channel cables and host bus adapters have been provided for this effort.

A new higher end tier of storage will be added to FERC HQ replacing the EMC CLARiiON as Tier 1 SAN (block level) storage available to FERC. A Symmetrix DMX 1500 will be added to the Cisco fabric to provide Tier 1 storage for Exchange, eLibrary and File Services. The DMX 1500 will come equipped with (4) 8-port fibre channel Channel Directors for front end host connectivity. Not all 32 ports will be used in the beginning but were provided for future expandability, this will be determined by the Implementation Specialist at the time of installation. Each port on the Symmetrix Channel Director can support numerous incoming host connections (fan in/fan out ratios subject to vary based on the EMC support matrix). The DMX 1500 will have (6) 8GB Memory Directors (cache boards) for a total of 48GB of shared global memory. The storage provided in the DMX 1500 will be (28) 146GB 10K fibre channel drives and (86) 300GB 10K fibre channel drives for a total raw capacity of approximately 29TB. The 146GB drives will be used for Microsoft Exchange 2003 storage in a RAID 1 configuration (as well as provisioning for hot sparing). This disk storage assumes 1,500 Microsoft users with a moderate to heavy usage I/O profile (<.75 IOPs). The 300GB drives will be used for eLibrary and File Services storage as well as clones for all three applications (and provisioning for hot sparing). Currently, eLibrary requires 2TB for FileNet cache, File Services require 6TB. EMC recommends a RAID 5 configuration for eLibrary and File Services. Based on this configuration, the amount of 300GB drives are deemed adequate to support the production storage requirements for AIX and File Services in a RAID 5 configuration. There is also enough storage with the 300GB drives to provide a save area for snapshots and (1) RAID 5 protected clone for each Exchange, eLibrary and File Services volume. The Symmetrix will be licensed for Timefinder software to create point in time snapshots and clones for an enhanced level of local recovery in-the-box. Scripts will also be developed to provide online backup from these clones to the CLARiiON Disk Library via Legato Networker. Symmetrix Remote Data Facility will also

be provided for synchronous replication to the FERC DRP site located in Rockville, MD. SRDF/S will provide real time replication of every incoming write to FERC HQ to provide zero data loss at the DRP site. As a note, the disk capacities indicated here are subject to decrease based on the results of an ongoing archiving assessment EMC is in the process of. Much of this data can be moved off of the CLARiiON and/or Symmetrix to the EMC Centera for archive and free up production storage for growth. Please see Addendum 1.0 to this TPD for the archiving assessment results.
EMC Control Center (ECC) has been provided in order to discover, manage and configure the Symmetrix DMX 1500 storage array. ECC will give FERC a Windows GUI look and feel to managing both Symmetrix storage arrays at HQ and DRP. This will centralize management and streamline operations. ECC can be further built upon such that FERC can use ECC to discover, monitor and manage both fibre channel and IP networks and devices. ECC will require a dedicated server at both HQ and DRP to be GFE. Fibre channel cables and host bus adapters have been furnished for this requirement.

EMC has recommended upgrading the (2) Cisco MDS 9506 Enterprise Directors to provide advanced functionality for management, monitoring and IP replication. The Directors will be licensed for the Cisco Enterprise Software Bundle (inter-VSAN routing, enhanced security), Fabric Manager Server License (for historical performance monitoring) and a San Extension License (to provide FCIP replication to the DRP site). A Fabric Manager server will also need to be provided as GFE. EMC has provided fibre channel host bus adapters and cables for this.
The use of the EMC Celerra NS702G for file sharing services will be discontinued in favor of Windows Servers running NTFS. There will be up to (3) Windows 2003 servers at FERC HQ and (3) at FERC DRP operating in Microsoft local clusters. EMC has provided Powerpath software, host bus adapters and cables for this conversion. The Windows servers will be SAN connected to the Cisco fabric and their file systems will be replicated synchronously using SRDF/S to the DRP site. These (6) Windows servers and associated Microsoft licensing will need to be provided as GFE. FERC will retain the EMC Celerra NS702G, but it is unknown at this time if the Celerra will continued to be used. Any work outside of migrating NAS LUNs to the Windows servers is outside the scope of this effort. No additional solutions have been provided for the Celerra to upgrade its capabilities, specifically with respect to the DRP site (including but not limited to replication).

EMC has recommended Legato EmailXtender and DiskXtender software to provide email and file system archiving to the EMC Centera CAS. FERC will be licensed for (1) EmailXtender (EX) and (4) DiskXtender (DX) server licenses. EX/DX will run on a single dedicated server that is SAN attached and is GFE for email archiving. EMC has provided pricing for host bus adapters and fibre channel cables for this requirement. The other (3) DiskXtender server licenses will operate on the HQ Windows file servers. FERC will be licensed for email archiving for a maximum of 1,200 Exchange mailboxes. FERC will be licensed for a DiskXtender capacity license to provide archiving to the Centera for a maximum of 7TB. EX/DX licensing will be provided for HQ only. eLibrary data will be migrated from optical storage to the EMC Centera. EMC will provide a software migration utility for this effort. FileNet will be the application responsible for integrating into the Centera API for eLibrary. EMC assumes no liability for providing FileNet licensing or services to satisfy this requirement. It will be FERC's responsibility to secure these requirements.
The EMC Centera CAS will be outfitted with an additional 4 nodes which will also run the Client Protection Mirrored (CPM) data protection scheme. This will then provide the Centera with 8.1TB usable capacity. The existing and new nodes will be licensed with Centera Governance Edition software for records retention and compliance. Centera File Archiver software will also be provided so that file data from the Windows file servers can be archived to the Centera. Asynchronous replication software will be provided for replication to the DRP site.
All SAN attached hosts will be configured to boot from the SAN (OS and applications) at HQ.

EMC will perform all data migration services required to migrate data from the CLARiiON CX700 to the DMX 1500. It is unknown at this time if and how FERC will continue to use the CX700. Due to this, any configuration of the CX700 – beyond data migration services – is outside the scope of this document.

DRP Site

A new Symmetrix DMX 1500 will be added to the DRP site to provide Tier 1 (redundant) storage for Exchange, eLibrary and File Services. This DMX will serve as a failover storage platform in the event of a disaster or maintenance at HQ. The DMX 1500 will come equipped with (4) 8-port fibre channel Channel Directors for front end host connectivity. Not all 32 connections will be used in the beginning, but have been provided for future growth. Connections will be determined by the EMC Implementation Specialist at the time of installation. Each port on the Symmetrix Channel Director can support numerous incoming host connections (fan in/fan out ratios subject to vary based on the EMC support matrix). The DMX 1500 will have (6) 8GB Memory Directors (cache boards) for a total of 48GB of shared global memory. The storage provided in this DMX 1500 will be exactly the same as the DMX 1500 at HQ (as well as the disk allocation/configuration). This is so we have an exact 1:1 match of storage at both sides. So, (28) 146GB

10K fibre channel drives and (86) 300GB 10K fibre channel drives for a total raw capacity of approximately 29TB. The Symmetrix will be licensed for Timefinder software to create point in time snapshots and clones for an enhanced level of local recovery (if DRP becomes production for HQ). Symmetrix Remote Data Facility will also be provided to accept synchronous replication from HQ during "business as usual" periods and to provide synchronous replication to HQ during a disaster or maintenance at HQ (when DRP is running as primary).

EMC has recommended that FERC provide GFE SAN-based servers/nodes in a near 1:1 ratio with headquarters. FERC will need to provide (3) Exchange 2003 servers, (3) Windows 2003 File Servers, (2) AIX 5.2 servers for eLibrary, (1) EX/DX server, (1) ECC server, and (1) Fabric Manager Server. These servers must have the exact same configuration as the HQ servers they are "mirroring" (CPU, Memory, OS, path level). EMC has provided Powerpath licensing as well as host bus adapters and fibre channel cables to accommodate this. All of these hosts will also be configured to boot from the SAN at the DRP site (OS and applications). In the event that FERC wants to fail over to the DRP site for disaster or maintenance purposes all services provided by EMC at HQ will rapidly restart and be provided at the DRP site. All updates that come into the DRP site while operating in production will be captured and sent back to HQ once it is again operational (in the event of a disaster) or while it is operating in standby mode (during maintenance). EMC assumes no responsibility for FileNet services in order to accomplish this same mission. FERC will need to secure the necessary licensing and services from FileNet in order to have this same rapid restart, failover/failback capability.

EMC will implement a similar Cisco MDS fabric as HQ with one exception, there will only be (1) Cisco MDS 9506 Enterprise Director. It was identified by FERC that redundancy at the DRP site at the fabric layer is not currently a desired requirement. The MDS 9506 Director will have 32 fibre channel and 8 IP ports available. It will also be licensed for the Enterprise Software Bundle, Fabric Manager Server and SAN Extension licenses. The Fabric Manager Server license will need to run on a SAN attached server that is GFE. Host bus adapters and fibre channel cables have been provided for this.

A new Centera with twelve nodes will be provided at the DRP site, configured with CPM data protection and yielding approximately 8.1TB usable capacity. Like HQ, the Centera will be configured with Governance Edition software for retention and regulatory requirements, Centera Replication to accept replication from HQ and Centera File Archiver for file system archiving and retrieval.

Backup and recovery products and services at the DRP site are not part of the scope of this project. FERC has declined these products and services at this time (including but not limited to Legato Networker, Automated Tape Libraries and CLARiiON Disk Library technology). EMC has provided Timefinder software and disk hardware for creation of clones within the Symmetrix for local replicas at the DRP site, but that is the extent of "data protection" efforts at the DRP site.

Mass Mailings

Standard Operating Procedures (SOP) on "Mass Mailings" for eLibrary Operations

When Office of the Secretary (OSEC) receives the same type of letter, fax, cards, etc., mailings from the general public, and it is evident from the first group received that the quantity will exceed 25 items, these same letter, fax, cards, etc., mailings will be declared as "Mass Mailings" by the Secretary's Office, though this phrase will not be used in the eLibrary index description. Documents received in eLibrary Operations from other responsible offices will be referred to OSEC for a decision on assigning them the Mass Mailing treatment. A Cover Info Sheet will be prepared by OSEC and used with all the mailings rubber banded together with the Cover Info Sheet indicating the Mass Mailings' Subject Matter, Dates for the Week received, and how many were received that week. A maximum of three hundred will be bundled together with one Cover Info Sheet. The Cover Info Sheet will not be input to eLibrary. Bundles will be delivered to the eLibrary Help Desk in Room 1C-1. eLibrary Operations staff will publish a single accession number for each bundle of 300, or fewer, mailings, using identical index information for each transaction, except for the dates for the week and the counts of individual pieces within the bundle. The standard format for index descriptions will be as follows:

> Comments of individuals requesting FERC to *do something* under *docket number*. This letter represents approximately *nnn* comments received during the week of *mm/dd/yyyy*.

The italicized phrases would vary according to the particular mass mailing, and, with the exception of the *do something* would appear on the Cover Info Sheet. Individual names will not be included in the index description, nor as Authors; Affiliation of "Individual" will be assigned.

~~After eLibrary Ops inputs it, the bundle will be moved to the RMC to be kept on a special Mass Mailings Schedule for three years or longer as needed. At the end of the retention period, the RMC will notify OSEC of the impending disposition, and request concurrence to dispose, or to retain longer for future case file use.~~ KQ-C

“Mass Mailings”

Internal Dockets Cover Info. Sheet (revised 5-2-07)

More details on the processing of these materials are available in the SOP.

DOCKETS: Please deliver these materials to eLibrary Help Desk in room 1C-1 for their processing.

ELIBRARY OPERATIONS: This page is NOT to be scanned into eLibrary. It is only to provide information for processing of these documents. Publish one single accession number for each bundle (of 300 or fewer) mailings, using identical index information for each transaction, except for the dates for the week and the counts of individual pieces within the bundle. (The format of the description and authors is available in the SOP’s) After input, the bundle and this cover sheet will be transferred to the Records Maintenance Center for disposition.

From Dockets: Name: ______________________ Date: _________________

Subject Matter: ____

Received Dates: From ____________________ to ______________________

Number of Documents in this Bundle (max. of 300 or less): _______________

ELibrary Operations Input into eLibrary system Completion Date: __________

Telephone Operator

Standard Operating Procedure (SOP)

August 2007

Document Name:	Telephone Operator Standard Operating Procedures
Publication Date:	August 2007
Contract Number:	FERC-03-OED-30189
Prepared By:	General Dynamics Information Technology 3040 Williams Drive, Suite 200 Fairfax, VA 22031
Approved:	____ Dennis Grey, DCIO Task Manager, Customer Support

1. Purpose of the Telephone Operator SOP

This document provides standard operating guidelines for contractor telephone operators at the Federal Energy Regulatory Commission (FERC). It also describes methods for modifying and producing the FERC Telephone Directory.

2. Telephone Operator Protocol - Workstation

- The FERC telephone operator answers calls on eight telephone lines:
  - Four extensions of (202) 502-6650
  - Four extensions of (202) 502-8200
- Incoming calls are indicated by flashing lights.

2.1. Hours of Operation

- Operator duty hours: 7:00 a.m. to 6:00 p.m.
  - Monday through Friday, except FERC holidays
- Relief coverage is provided by IT Support Center personnel
  - From 7:00 a.m. to 9:30 a.m. **and** during operator's lunch period and other absences.

2.2. Performance Standards

Courtesy is extended to all callers.

- All calls must be answered in no more than 2 rings.
- Greetings:
  - Good Morning/Good Afternoon, Federal Energy Regulatory Commission. Would you hold, please? I have another call ringing.
  - Federal Energy Regulatory Commission. I'm on another line, would you please hold?

2.3. Answering Caller Requests

Connecting callers to departments or offices

- Check the FERC telephone directory (organizational listing or topical directory) the Telephone Quick Reference List (Appendix A) or other locator documentation.
- Give the caller the number for future reference.
- All Government/International inquiries should be referred to the Office of External Affairs (OEA) at (202) 502-8004.
- Transfer individuals needing additional assistance to OEA.
- Transfer the call.

Connecting callers with specific individuals

- Check the FERC Telephone Directory (alphabetical listing).
- For unlisted employees, access MS Outlook and find the employee's information

(See Section 3 of this document.)

- Give the caller the number for future reference.
- Transfer the call.

2.4. Emergencies

The telephone operator must immediately report emergencies to the General Dynamic Information Technology (GDIT) Customer Support Task Manager. Together, the operator and the GDIT Manager will determine and initiate the most effective course of action. Once action has been taken, the GDIT Manager will inform the DCIO Customer Support Task Manager.

EMERGENCY TELEPHONE NUMBERS	
AGENCY	**NUMBER**
Fire Department	911
Emergency Medical	911
Police Department	911
Building Security	202-502-8911
Health Unit Nurse	202-502-8112

3. Administrative Functions – Checking IT Support Center (ITSC) Voice Mail

Voice mail for the ITSC activates when all three dedicated ITSC phone lines, (202) 502-8163, are in use. FERC users may leave a voice mail message stating the nature of their problem if they so choose. However, if their problem is **URGENT**, the voice mail greeting states to continue calling until they reach an analyst.

Voice mail for ITSC is checked every 15 minutes during normal business hours by the telephone operator and entered into the ITSC Voicemail Log Sheet. A Touchpaper ticket is opened with the user's information. The user is then called back and provided with the Touchpaper ticket number.

3.1. Setting Up Conference Calls

The telephone operator sets up conference calls for FERC users who E-Mail the IT SUPPORT CENTER E-Mail account with the following information:

- Date and time of call. Time of call must include start and finish times (e.g., 2:00 p.m. to 4:00 p.m. Eastern Standard Time).
- Name of the Leader.
- Number of telephone lines needed.
- Names and phone numbers (including area codes) for each participant (only if a MCI WorldCom operator will be dialing out to the participants).
- Pass code

Upon receipt of this information, the telephone operator

- Opens a Touchpaper ticket with the provided information.
- Calls the MCI WorldCom Reservations Operator at 1 (877) 855-4797 and relays all conference call information.
- Receives a Confirmation Number from the MCI WorldCom operator.
- Updates the Touchpaper ticket with the Confirmation Number.
- Calls or E-Mails the FERC user and relays the Touchpaper ticket number for tracking purposes.
- Assists with any changes to the call using the Touchpaper ticket number.
- Routes the Touchpaper ticket to QA-ITSC for closure once the call is finished.

3.2. Processing Transfer of Property (TOP) Requests

ADP-related TOPs (for surplus of hardware and software) are received by the IT Support Center for processing by interoffice mail or they are hand-carried to the IT Support Center, Room 3-B. In addition, most hardware and software under $500 are no longer in Sunflower. In cases where these items are surplussed, an E-Mail from the APR will be sent to the IT Support Center. (Please refer to the Touchpaper SOP for detailed instructions on entering TOP Requests into the Touchpaper system).

Once the TOPs are received by the ITSC from the organizational Administrative Officers (AOs):

- The TOP is date-stamped by the ITSC.
- The TOP **or** E-Mail is entered into Touchpaper under the **Ticket Type** of **TASKING**.
- The **Priority** is changed to **TASK**.
- The Due Date in the **Action Track** is set to expire after **three** working days.
- The Touchpaper ticket number is placed in the lower left hand corner of the TOP to be used as a cross reference. The hard copy is placed in the PC Staging box in the IT Support Center.
- The Touchpaper ticket is reassigned to the ADMIN-ITSC who reassigns the ticket to PC Staging.
- Once PC Staging completes surplus of the TOP items, they complete the **Action** Track and **Ticket Notes** in Touchpaper and reassigns the ticket back to the SIGNAL Task Manager for closure.

3.3. Processing Requests for Non-Public Access

Once the request is received by the IT Support Center:

- The request is entered into the Touchpaper using the following:
  (User Name) needs access to (Requested Access). (User name) should be given access to eLibrary non-public materials (and a non public user ID) and access to all non public materials in the Records Maintenance Center.
- Ticket type should be entered as TASKING and sub type entered as ITSC.

- The Priority is changed to TASK.
- The due date in the Action Track is set to expire after 3 working days.
- The Touchpaper ticket is assigned to ADMIN-ITSC.
- The Touchpaper ticket number is placed on the lower left hand corner of the Non-Public Access request and then sent to the Public Reference Room (Position room 1B-5) via interoffice mail.

4. FERC Telephone Directory Production Procedures

The telephone operator works closely with DCIO to update the FERC telephone directory upon request by DCIO. The directory contains three major sections:

- Alphabetical listing of employees
- Organization listings including regional offices
- Topical directory of FERC offices, functions, services

And a variety of supplemental information:

- Emergency numbers
- FERC telephone system user information
- Area code and time zone map
- FERC organizational chart
- Organization abbreviations

4.1. FERC Telephone Directory

The FERC telephone directory, for public sale and FERC distribution, is created and updated at the request of OED. The process includes providing the Alphabetical listings, Organizational listings and Topical Directory to the FERC administrative officers for review. The administrative officer's edits are formatted and incorporated into the Telephone Directory.

4.1.1. Distributing the Alphabetical listing, Organizational listing and Topical Directory to the FERC Administrative Officers

- Open **Microsoft Outlook**
- Select **File\New\Message** to create a new email message
- Type the name of the AO in the **'TO:'** field
- Type **'Alexander Stankus'** in the **CC:** field
- Insert the memo text provided by OED into the body of the message

*****NOTE***** *The memo text describes what the AO should do with the data, such as editing the Alphabetical, Organizational Listings and Topical Directory in the Microsoft Word document. It also includes text which indicates when and where the edited data should be returned. It can be obtained currently from Alexander Stankus*

5. Telephone Problems

When FERC users call the IT Support Center to report telephone problems, the IT Support Center analyst will:

- Open a Touchpaper ticket and record all of the information in the ticket.
- Give the user the Touchpaper ticket number for tracking purposes.
- Route the ticket to **ADMIN-ITSC** for assignment. ADMIN-ITSC reassigns the ticket to the **OPS** group for resolution.

An OPS technician resolves the problem, completes the information in the Touchpaper ticket and reassigns it back to **QA-ITSC** for QA call back and closure.

Quality assurance call backs are made by the ITSC to ensure problem resolution and user satisfaction.

APPENDIX A
FEDERAL ENERGY REGULATORY COMMISSION
208-0200
888 FIRST STREET, N.E.

Title	Name	Phone	Room	Routing
Chairman	Joseph Kelliher	202-502-8377	11A-1	CH-1
Commissioner	Jon Wellinghof	202-502-6580	11E-1	CO-2
Commissioner	Suedeen G. Kelly	202-502-6501	11B-01	CO-3
Commissioner	Mark Spitzer	202-502-8366	11D-1	CO-4
Commissioner	Philip Moeller	202-502-8852	11C-1	CO-5

ORGANIZATIONAL LISTING BY OFFICE

Office	Phone	Room	Routing
Office Of The Chief Accountant	202-502-8600	7A-01	CA-1
Office Of External Affairs	202-502-8004	11H-9	EA-1
Office Of The Executive Director And Chief Financial Officer	202-502-8300	11J-1	ED-1
Office Of Economic Policy	202-502-8700	6A-01	PJ-1
Office Of Secretary	202-502-8400	11G-1	ES-1
Office Of The General Counsel	202-502-6000	10A-01	GC-1
Office Of Administrative Law Judges	202-502-8500	11F-1	LJ-1

OTHER FERC DIVISIONS

Division	Phone	Room	Routing
Congressional Affairs	202-5028870	11H-15	EA-20
Docket Office	202-502-6301	1A-209	ES-1
Public Reference Room	202-502-8371	2A-1	ED-33
Health Unit	202-502-8112	3F	
Intergovernmental Affairs	202-502-8870	11H-15	EA-10

Library	202-502-8179	95-01	ED-1.1
Legal Department	202-502-6457	91-01	GC-13.1
Mail Room	202-502-6270	3P-16	ED-13.1
Personnel	202-502-8990	42-17	ED -21
Press (External Affairs)	202-502-8004	11H -15	EA-1
Procurement	202-502-8157	4J-03	
Publications	202-502-8371	2A-7	
Public Affairs	202-502-8680	11H-15	EA-20
Public Information	1-866-502-8400	2A-1	ED-12.2
Secretary's Office	202-502-8400	H-G	ES-1
Travel Services	202-502-8728	42-68	ED-21
Dispute Resolution Service	202-502-8870 1-866-208-FERC		

OTHER KEY FEDERAL AGENCIES

Agency	Phone
Department Of Energy	202-586-5000

APPENDIX B

(Sample Telephone Directory Update Memo)

January 1, 2005

MEMORANDUM

TO:	Administrative Officers Executive Assistants Confidential Assistants
FROM:	Alexander J. Stankus ADP & Telecommunications Services Division
SUBJECT:	Telephone Directory Updates

The updated edition of the Telephone Directory is scheduled for publication and distribution the first week of xxx. In order to publish the latest Directory information, please forward your updates via E-Mail to the IT Support Center (use **IT SUPPORT** address in MS Outlook) no later than (**xxx)**. If you prefer, a marked up hard copy of the lists can be submitted instead of using E-Mail.

Attached are the Topical Listing, the Organizational Listing, and the Alphabetical Listing of the areas in which each of you manage. **Note**: OEP have additional listings for the Regional Offices; OEA and OED should have also received the file that contains the Key Contacts list.

To make your changes, edit the listings directly, preferably using the attribute redline found in the Font dialog box displayed when you choose Format, Font in Word, and forward as attachments to the **IT SUPPORT** email address in MS Outlook. If an update affects both the Alphabetical Listing and the Organizational Listing, you must make changes to both listings. If you have changes to the narrative and/or topical portions of the directory, edit the Topical Listing directly using the attribute redlines. If you have no changes please return the listing with a notation that "no changes are required".

If you have any questions, please contact the IT Support Center at (202) 502-8163.

Attachments

cc: Dennis Grey
Bruce Grubb

Touchpaper

Standard Operating Procedure (SOP)

August 2007

Document Name:	Touchpaper SOP
Publication Date:	August 2007
Contract Number:	FERC-03-OED-30189
Prepared by:	General Dynamics Corporation 3060 Williams Drive Fairfax, VA 22031

Approved: ____

Dennis Grey, DCIO Customer Support Task Manager

1.0 Introduction

1.1 Purpose of Touchpaper SOP

The purpose of this document is to provide the Standard Operating Procedures for Touchpaper. Touchpaper is the call-tracking ticket system used by the Federal Energy Regulatory Commission (FERC) to track all computer and telecommunications related requests for service.

1.2 Touchpaper Capabilities

With Touchpaper, end-user service requests for support and problem resolution can be quickly logged into a database and assigned to an analyst. Touchpaper's features are identified below:

- Analysts monitor their own ticket queues
- Create views that allow analysts to see all open tickets as well as other analysts' tickets
- Run searches based on various selectable criteria
- Run reports to assess statistical data and trends
- Route requests to other analysts (this is limited by security rights at FERC)
- Document actions taken to resolve the problem using Ticket Notes and Resolution
- Resolve and close completed tickets
- Re-open tickets as necessary

2.0 Getting Started

2.1 Starting Touchpaper

Click on the Start button and choose Programs. The menu that is displayed should contain a program group called Administrative Support. This contains a group called HelpDesk. Select HelpDesk 7.1 to open Touchpaper.

2.2 Logging in to Touchpaper

When Touchpaper is started, the Touchpaper Login Dialog Box will prompt a user to enter a User ID and Password. Choose **OK** after entering this information. If an incorrect User ID or Password is entered a dialog box will appear with an "Invalid log in. Please re-enter your user ID and password" message and the application will not be started. In this case, reenter the correct User ID and Password.

The User ID and initial log in Password is assigned by the Touchpaper System Administrator. A User ID consists of the analyst's last name, a dash (-) and first letter of the analyst's first name. The User ID and Password are not case-sensitive.

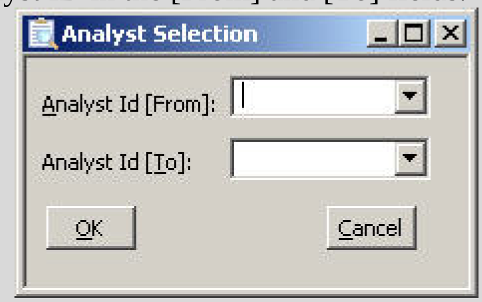
Example: SMITH-J

2.3 Accessing Touchpaper from the Internet

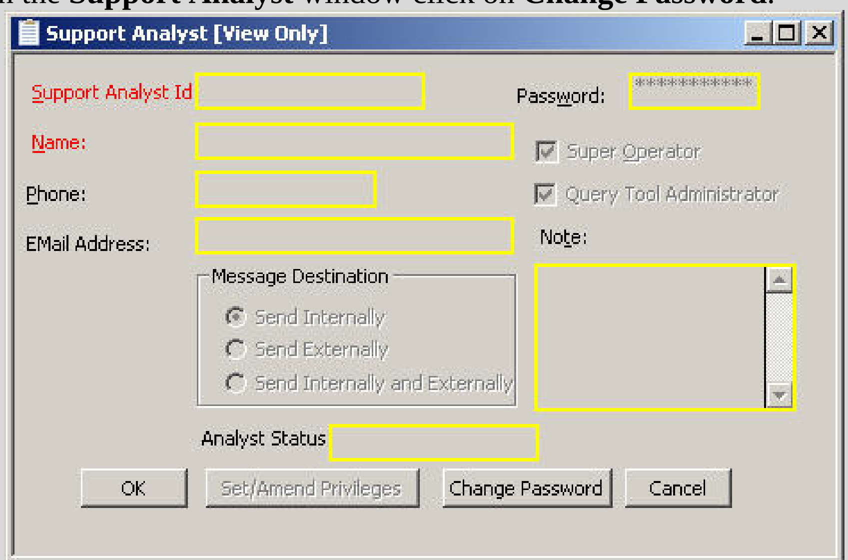
Step	Action
1	Open Internet Explorer and enter the URL link http://touchpaper/hie. This takes a user to the login screen for Touchpaper on the web.

2.4 Changing Your Touchpaper Password

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select File ➔ Open ➔ Analysts & Groups ➔ Analyst</td></tr>
<tr><td>2</td><td>Enter your Analyst ID in the [From] and [To] fields.



</td></tr>
<tr><td>3</td><td>Click OK.</td></tr>
<tr><td>3</td><td>On the Support Analyst window click on Change Password.



</td></tr>
<tr><td>4</td><td>On the Set Password window enter a new password then tab to the Confirm Password field and retype the new password.</td></tr>
<tr><td>5</td><td>Click OK</td></tr>
</table>

2.5 Exiting Touchpaper

Step	Action
1	Click File ➔ Exit or click on the **X** at the top right corner of the application window to close the application.

Note: All windows in each queue available to the analyst must be closed in order to properly exit out of Touchpaper.

3.0 Working with Touchpaper Ticket Requests

3.1 Opening a Touchpaper Ticket Request

Touchpaper requests are created by entering data into the system which is then stored in a historical database where requests can be tracked, closed-out when resolved, re-opened, sorted and used to create reports. When a user calls the IT Support Center to report a problem, the specifics of the request for support are entered by an analyst into the Ticket Details screen of the request. This creation or "opening" of a request formally records information about the problem as well as the details of the actions taken to resolve the problem.

When adding a new request to Touchpaper, the system automatically assigns a unique identification number which is the Ticket Number.

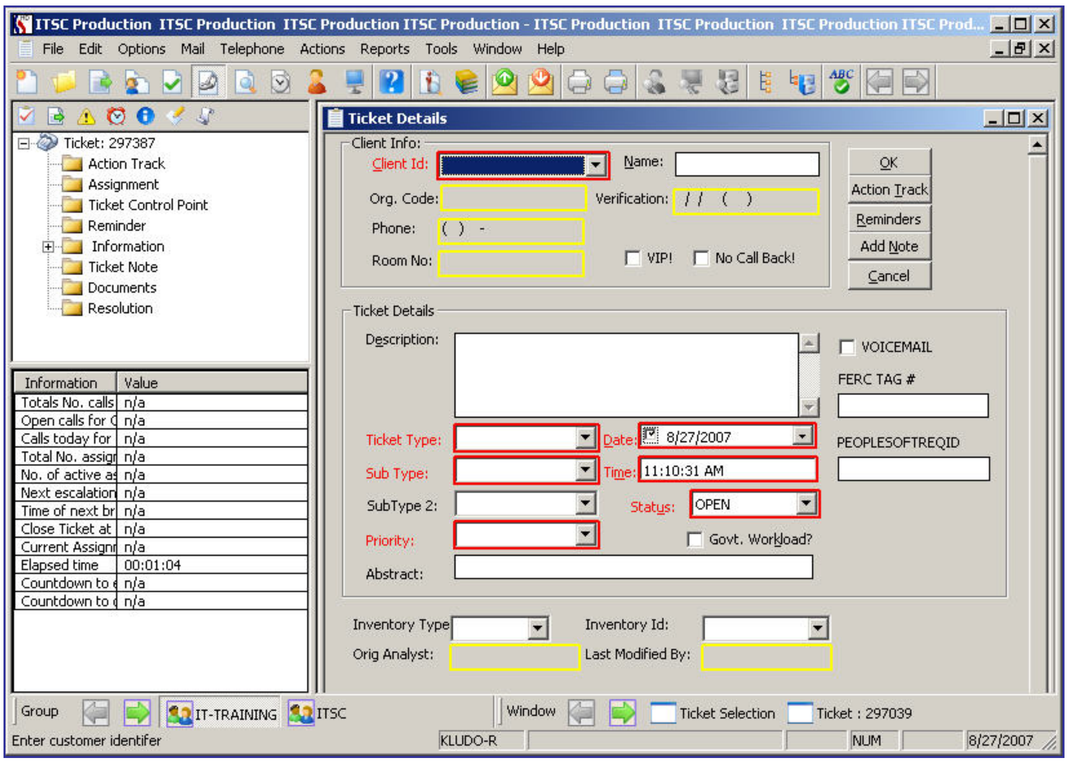
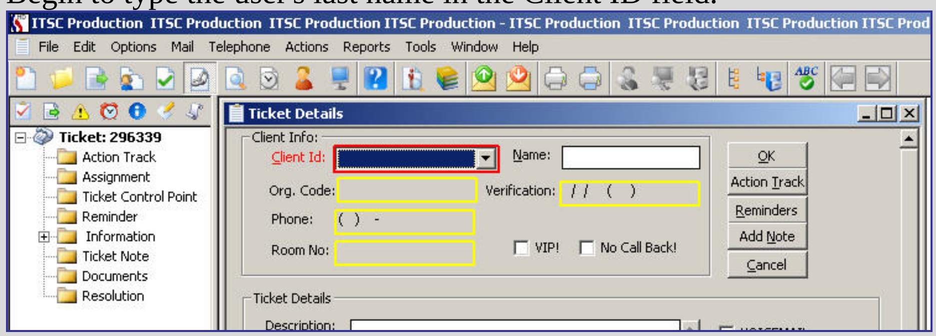


Fig. 3.1: Ticket Details Screen

3.2 Creating a New Request

Step	Action
1	Click on the **CREATE A NEW TICKET** button on the toolbar. 
2	Begin to type the user's last name in the Client ID field. 
3	Press **ALT + Down Arrow** to open the client list.
4	Scroll down to the last name you want then press TAB. **Note:** DO NOT press ENTER. ENTER acts as SAVE in Touchpaper.
5	Review the **VERIFICATION** field. X If the date in this field is **<u>less than 30 days old</u>**, move on. X If date is **<u>more</u>** than 30 days, click on **QUICK LOOKUP SPECIFIED CUSTOMER** button  X CONFIRM: ▪ User's room number ▪ User's phone number ▪ Update the record if this information has changed. ▪ Fill in the date and your initials in the parenthesis (). **NOTE**: The date style is now MM/DD/YY (analyst’s initials). X **Click OK**.
6	Click in the **DESCRIPTION** field. Enter the description of the problem the user is reporting. Get as much information as possible from the user. Ask the user if they are receiving any error messages with what they are trying to do. It is extremely important that you get as much information from the user as possible. If the user is unable to provide you with much information, please

	indicate this in the ticket. Please use the following verbiage: **"This is the only information the user was able to provide".**
7	TAB to the **TICKET TYPE** field. Fill in the ticket type from the choices listed.
8	TAB to the **SUB TYPE** field. Fill in the sub type from the choices listed.
9	TAB to the **SUB TYPE 2** field. Fill in the sub type 2 from the choices listed. **Note:** Some Sub Type 2 fields may not contain any choices or may contain choices that do not apply to the current issue.
10	Provide the user with the ticket number for their reference. **Note:** *You must provide the user with a ticket number for every call.*

Note: If the problem the user is reporting is an **URGENT** problem, please make sure that you change the **PRIORITY** to **URGENT**. Immediately notify the IT Support Center Admin that an **URGENT** ticket is being reassigned to the **ADMIN-ITSC** queue.

3.3 Routing a Request for Assignment

After a request is created, it may be necessary to route the request to an ITSC analyst providing desktop support or to an analyst in another group. After the ITSC analyst completes filling out the Touchpaper request, he or she **REASSIGNS** the ticket to the **ADMIN-ITSC** group for assignment.

Step	Action
1	Right-click on **ASSIGNMENT** on the ticket tree.
2	Select **NEW**.
3	TAB to the **GROUP ID** field. DO NOT fill in the Analyst ID field.
4	Begin typing **ADMIN-ITSC**.
5	Press TAB to fill in the field with **ADMIN-ITSC**. **Note:** DO NOT press ENTER. ENTER acts as SAVE in Touchpaper.
6	Place a check (/) in the **Return to Ticket** box on the Ticket Assignment window.
7	**Click OK**. This will take you back to the Ticket Details screen.
8	Confirm that the following fields are filled out correctly: • Description • Ticket Type • Sub Type • Sub Type 2 • Priority
9	**Click OK**.

3.4 Reassigning A Request To Another Analyst

After a request is created, it may be necessary to route the request to an ITSC analyst providing desktop support or to an analyst in another group. After the Helpdesk Admin reassigns the ticket to an ITSC analyst it may be necessary to another ITSC analyst or back to the **ADMIN-ITSC** group for assignment to another group.

Step	Action
1	Right-click on your assignment under **ASSIGNMENT** on the ticket tree.
2	Select **REASSIGN**.
3	TAB to the **GROUP ID** field.
4	Select the appropriate group from the **GROUP ID** drop down.
5	Select the appropriate analyst from the **ANALYST ID** field.
6	Place a check (/) in the **Return to Ticket** box on the Ticket Assignment window, if applicable.
7	**Click OK**. This will take you back to the Ticket Details screen.
8	Confirm that the following fields are filled out correctly: • Description • Ticket Type • Sub Type • Sub Type 2 • Priority
9	**Click OK**.

3.5 Routing a Request to Staff in Other Groups

Due to the nature of the service request, the Touchpaper ticket may need to be reassigned to staff in other groups (PC Staging, Network Engineering, Systems Engineering, System Assurance, Telecom, DCIO).

After the call is entered into Touchpaper it is reassigned to ADMIN-ITSC. The Helpdesk Admin reassigns the ticket to an IT Support Center analyst for initial troubleshooting. If the IT Support Center is unable to resolve the problem, the ticket is documented by the assigned analyst then reassigned back to **ADMIN-ITSC** for reassignment to the appropriate group. In some cases, the IT Support Center will work with the assigned group (COTS, PC Staging or Network Engineering) and will go with the third level support analyst to learn the resolution to the reported problem.

Step	Action
1	Right-click on the **ADMIN-ITSC** assignment under **ASSIGNMENT** on the ticket tree.
2	Select **REASSIGN**.
3	TAB to the **GROUP ID** field.
4	Select the appropriate group from the **GROUP ID** drop down.
5	Select the appropriate analyst from the **ANALYST ID** field, if applicable.
6	Place a check (/) in the **Return to Ticket** box on the Ticket Assignment window, if applicable.
7	**Click OK**. This will take you back to the Ticket Details screen.
8	Confirm that the following fields are filled out correctly: • Description • Ticket Type • Sub Type • Sub Type 2 • Priority
9	**Click OK**.

3.6 Routing a Completed Ticket Back to QA-ITSC for Closure

Once tickets have been completed by DCIO or GDIT staff, they are reassigned back to the IT Support Center for closure. The IT Support Center is responsible for closing all tickets. All tickets are reassigned back to either QA-ITSC or QA-PC-STAGING for closure. Trouble tickets will get a quality assurance call back. GDIT trouble tickets will be graded and closed.

Step	Action
1	Right-click on Resolution under **RESOLUTION** on the ticket tree.
2	Select **CLOSE**.
3	In the **DETAILS** field add **QAD-Problem resolved. User satisfied with service received.** or **QAD-Called user left vm.**(If a voicemail message is left.) Before the text in the **DETAILS** field.
4	**Click OK**.

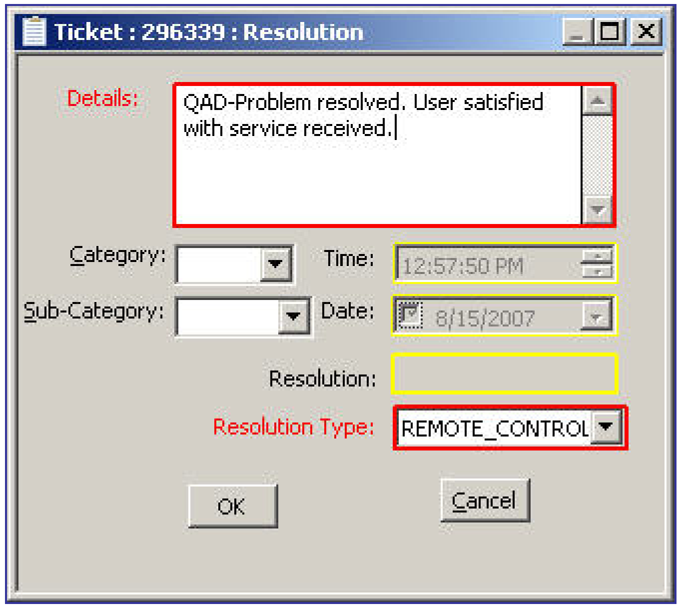


Fig. 3.2: Ticket Resolution

3.6.1 IT Support Center Quality Assurance Callback Procedures

- All trouble tickets will be reassigned to **QA-ITSC** from the analyst who completes the Touchpaper trouble ticket.
- At that point, the QA analyst will perform the QA callback. The QA analyst will note whatever comments the user reports in the Touchpaper ticket.
- During a QA callback, if a user reports that his or her original problem still exists, inform the IT Support Center Admin immediately. The ticket will be re-opened and reassigned to the original analyst. The Priority will be changed to **URGENT**. The user will receive immediate assistance.
- QA Callbacks will be done on all trouble tickets and only trouble tickets. (Excluding trouble tickets routed to QA-PC-STAGING, network printer tickets, local printer toner and paper jam tickets.)

If the issue has not been resolved the IT Support Center Administrator will reassign the ticket back to the person who initially resolved the problem. If the original analyst needs additional assistance he/she will notify the IT Support Center Administrator who will provide the additional assistance to the analyst.

Hi this is __________________ (first name) from the IT Support Center.

I'm calling to see if the (description of the problem in the TP ticket) that you reported (today, yesterday, date, etc.) has been resolved to your satisfaction.

If NO - Make arrangements with the user to send an analyst back ASAP to address the problem.

SAMPLE SCRIPT IF QA ANALYST HAS TO LEAVE A VOICE MESSAGE FOR USER

I'm calling to see if the (description of the problem in the TP ticket) that you reported (today, yesterday, date, etc.) has been resolved. If it has not, please call the IT Support Center at 502-8163. Thank you.

INSTRUCTIONS for recording information in Touchpaper ticket

Use the **QA-ITSC** assignment to enter user's comments.
Enter the following verbiage that applies:
QAD-Problem resolved. User satisfied with service received.
QAD-Called user left vm.
Enter other relative comments from user.
If the user reports that the problem still exists, immediately notify the ITSC Administrator so that the ticket can be re-opened and reassigned to the original analyst with an urgent priority. The original analyst will be dispatched to assist the user immediately.
After the QA callback is completed, the QA analyst will close the Touchpaper ticket.

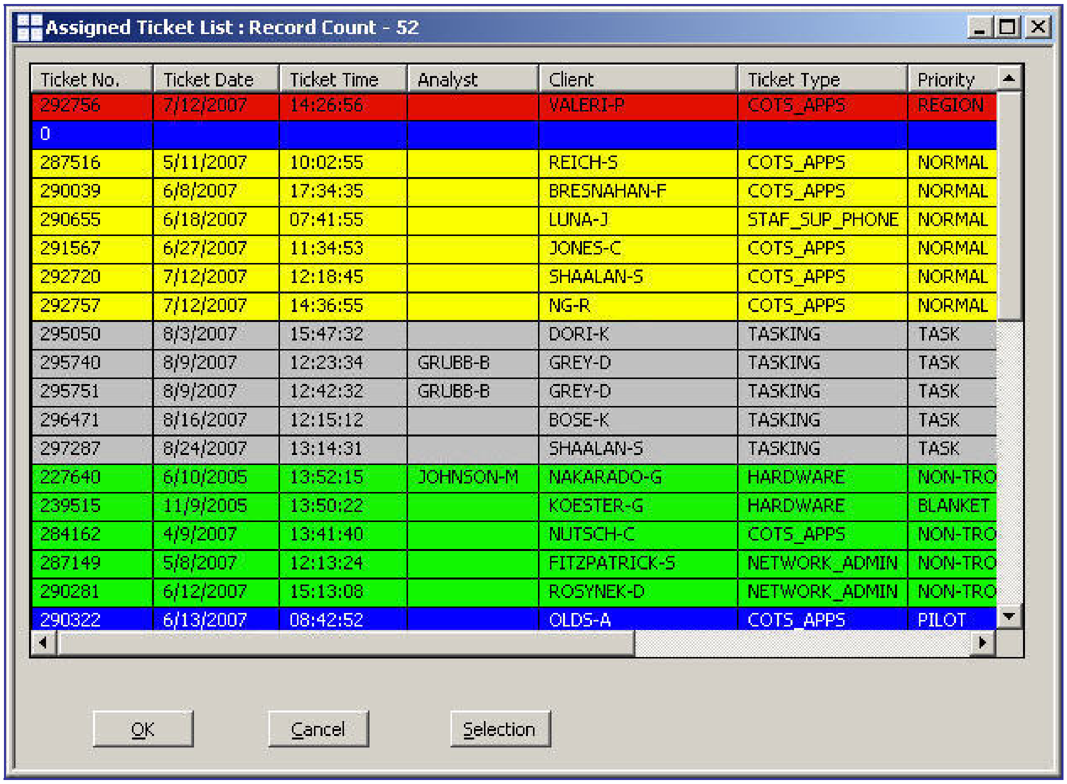
Figure 1.1 QA Script

3.7 How to View Your Assigned Ticket List

The **Assigned Ticket List** is where you see the tickets that are assigned to you. To access the Assigned Ticket List:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select the group to view from the available options at the bottom of the Touchpaper window.

</td></tr>
<tr><td>2</td><td>Click on the Assigned Ticket List button on the toolbar.
</td></tr>
<tr><td>3</td><td>Click OK on the Ticket Assignment Selection window.</td></tr>
</table>



Ticket No.	Ticket Date	Ticket Time	Analyst	Client	Ticket Type	Priority
292756	7/12/2007	14:26:56		VALERI-P	COTS_APPS	REGION
0						
287516	5/11/2007	10:02:55		REICH-S	COTS_APPS	NORMAL
290039	6/8/2007	17:34:35		BRESNAHAN-F	COTS_APPS	NORMAL
290655	6/18/2007	07:41:55		LUNA-J	STAF_SUP_PHONE	NORMAL
291567	6/27/2007	11:34:53		JONES-C	COTS_APPS	NORMAL
292720	7/12/2007	12:18:45		SHAALAN-S	COTS_APPS	NORMAL
292757	7/12/2007	14:36:55		NG-R	COTS_APPS	NORMAL
295050	8/3/2007	15:47:32		DORI-K	TASKING	TASK
295740	8/9/2007	12:23:34	GRUBB-B	GREY-D	TASKING	TASK
295751	8/9/2007	12:42:32	GRUBB-B	GREY-D	TASKING	TASK
296471	8/16/2007	12:15:12		BOSE-K	TASKING	TASK
297287	8/24/2007	13:14:31		SHAALAN-S	TASKING	TASK
227640	6/10/2005	13:52:15	JOHNSON-M	NAKARADO-G	HARDWARE	NON-TRO
239515	11/9/2005	13:50:22		KOESTER-G	HARDWARE	BLANKET
284162	4/9/2007	13:41:40		NUTSCH-C	COTS_APPS	NON-TRO
287149	5/8/2007	12:13:24		FITZPATRICK-S	NETWORK_ADMIN	NON-TRO
290281	6/12/2007	15:13:08		ROSYNEK-D	NETWORK_ADMIN	NON-TRO
290322	6/13/2007	08:42:52		OLDS-A	COTS_APPS	PILOT

Fig. 3.3: Assigned Ticket List

You can size the columns in this view the same way you would in an Excel spreadsheet or a Word table. Position your mouse pointer on the line that separates the column headings (the mouse pointer will change in appearance to a vertical line with arrows pointing left and right). Press and hold your left mouse button and while holding drag the mouse pointer to the left or right to resize the column. The columns can be automatically resized by Touchpaper by double-clicking the line between the columns to resize the column to the left of mouse pointer.

This change does not remain permanent. Each time you look at your assigned ticket list (after you have closed it or opened a ticket) you will have to do this if you choose to. To look at your tickets from this view, double click on a ticket and it will open the ticket.

If you choose to leave your **Assigned Ticket List** opened you will see **Assigned Ticket...** on the bottom of your Touchpaper Taskbar. You can click on that to quickly go into your ticket list.

The default setting will automatically **REFRESH** if you leave your assigned ticket list.

Step	Action
1	Click Options ➔ Analyst ➔ Display
2	Place a check (/) in Refresh Assigned ticket list automatically to enable this option if it has been disabled.

To refresh your Assigned Ticket List manually:

- Click on the heading Ticket No. This will update your Assigned Ticket List.

On the Assigned Ticket List, the tickets will be grouped by their type (TASK, REQUISITION, NON-TROUBLE, NORMAL, URGENT, REGION), then age. The oldest tickets of a given type will appear at the top of their group while the newest tickets will appear at the bottom of the group.

3.8 How to View Assigned Ticket Lists for Other Analysts

There may be instances where you need to look at the Assigned Ticket List for another analyst. The instructions below explain this process.

Step	Action
1	Click on the **Assigned Ticket List** button on the toolbar. 
2	TAB to the **Analyst** field.
	Click on the down arrow in the **Analyst** field to select the analyst you want.
	TAB to the **GROUP ID** field.
	Click on the down arrow in the **Group ID** field to select the group you want.
	Click OK. The analyst's Assigned Ticket List window will open showing their assigned tickets.
	To **close** the Assigned Ticket List window click on **CANCEL**.

3.9 Identifying Ticket Types

Different colors are associated with different types of tickets. The following ticket types are depicted using the following color scheme:

Color	Ticket Type
Trouble Tickets	
White	Normal ticket that has been open for less than 2 day.

Blue	Normal ticket that has been open for more than 2 day.
Yellow	Normal ticket that has been open for more than 1 day.
Red	URGENT tickets
Non-Trouble Tickets	
Green	• Conference Calls • ITC • Request for User IDs • Separation of Clearance
Brown	**Requisitions**
Gray	**Tasks**

3.10 Normal and Urgent Trouble Ticket Process

The next few pages outline how assigned analysts respond to Normal and Urgent Trouble Tickets.

3.10.1 How to Handle Normal Trouble Tickets

Step	Action
1	IT Support Center phone support analyst enters call into Touchpaper.
2	IT Support Center phone support analyst assigns the ticket to **ADMIN-ITSC** and then reassigns the ticket to the analyst's own queue. If the ticket needs to be assigned to another group, the analyst will notify the IT Support Center Admin who will assign the ticket to the appropriate support group.
3	Once the ticket is assigned, the assigned analyst calls the user of the respective ticket. If the user is reached, the analyst will set up an appointment time that is convenient for the user for the analyst to come and resolve their problem. At this point, the analyst will enter this information into the **RESPONSE** ticket note. **<u>Example:</u>** RESPONSE-I called the user. She asked me to come to her office this afternoon at 2:00 p.m. to resolve her problem. If the user is not reached, the analyst will leave their name, the phone number of the ITSC and a message that they are calling to set up an appointment time that is convenient for the user to come and resolve their problem. At this point, the analyst will enter this information into the RESPONSE ticket note. **<u>Example:</u>**

	RESPONSE-I called the user and left a vm. I left my name and the phone number of the ITSC. I asked the user to call me to schedule an appointment at their convenience to resolve their reported problem.
4	In the event that a message is left for the user and the user returns the assigned analyst's call, the analyst will set up an appointment time that is convenient for the user to come and resolve their problem. At this point, the analyst will enter a new **STATUS** ticket note indicating the time the appointment has been scheduled for. Before the assigned analyst leaves for the scheduled appointment, a second **STATUS** ticket note will be created indicating they are leaving for their scheduled appointment. See Example 1 and 2 below. **Example 1:** STATUS-I called the user. She asked me to come to her office this afternoon at 2:00 p.m. to resolve her problem. **Example 2:** STATUS-I am leaving now for my 2:00 p.m. appointment to resolve the user's problem.
5	Assigned analyst visits user and resolves the user's problem or resolves the issue over the phone or through remote access. If the user is present when the problem is resolved, the analyst informs the user that the problem is resolved. If the user is not present when the problem is resolved, the analyst will leave a "Sorry We Missed You" note with the date, time, their name and the Touchpaper ticket number. The analyst will indicate on the left side of the note that the problem has been resolved and to please call the IT Support Center if they need further assistance. **"Sorry We Missed You" Ticket Note Example:** 8/6/99, 10:30AM, User's Name: Your problem has been resolved. If you need further assistance, please contact the IT Support Center. -- Technician's name.
6	The assigned analyst enters a **Resolution** into the ticket. The Resolution will be a detailed explanation of the fix to the reported problem. After the resolution is completed, the analyst will reassign the ticket to **QA-ITSC**.
7	**QA-ITSC** performs a quality assurance call back to the user. The QA analyst enters the user's feedback into the QA-ITSC assignment window.
8	**QA-ITSC** closes the Touchpaper ticket.

3.10.2 How to Handle Urgent Trouble Tickets

Step	Action
1	IT Support Center phone support analyst enters call into Touchpaper.
2	IT Support Center phone support analyst assigns the ticket to **ADMIN-ITSC**. An email is sent to the IT Support Center mailbox indicating that the ticket is in the **ADMIN-ITSC** queue. The analyst also verbally notifies ADMIN-ITSC that an urgent ticket was just reassigned. ADMIN-ITSC reassigns the ticket to an IT Support Center analyst or the appropriate support group. If the ticket is assigned to a group other than the IT Support Center, ADMIN-ITSC will notify the group that an urgent ticket has just been reassigned to it.
3	Once the ticket is assigned, the assigned analyst will enter a **RESPONSE** ticket note. **<u>Example:</u>** RESPONSE-Leaving now to resolve the user's problem.
4	If you go to resolve the user's urgent problem and they are not there, the analyst will leave a "Sorry We Missed You" note with the date, time, their name and the Touchpaper ticket number.
5	After the analyst returns from the user's office, the analyst will enter a **STATUS** ticket note indicating that the user was not in his/her office upon arrival and that a "Sorry We Missed You" note was filled out and left for the user. **<u>Example:</u>** STATUS-Upon arrival to resolve the user's problem, the user was not in his/her office. A Sorry We Missed You note was filled out and left for the user.
6	User returns call to the assigned analyst. The analyst will set up an appointment time that is convenient for the user for the analyst to come and resolve their problem. Next, the analyst will enter a new **STATUS** ticket note indicating the time when the appointment has been scheduled. If the user asks the analyst to come right away, the analyst will indicate that they are leaving now to resolve the user's problem. If an appointment has been scheduled for a later time, before the assigned analyst leaves for the scheduled appointment, a third **STATUS** ticket note will be created indicating they are leaving for their scheduled appointment. See Example 1 and 2 below. **<u>Example 1:</u>**

	STATUS-User called me back. She asked me to come to her office this afternoon at 2:00 p.m. to resolve her problem or I am leaving now to resolve the user's problem. **Example 2:** STATUS-I am leaving now for my 2:00 p.m. appointment to resolve the user's problem.
7	Assigned analyst visits user and resolves the user's problem. If the user is there when problem is resolved, the analyst informs the user that the problem is resolved. If the user is not there once the problem is resolved, the analyst will leave a "Sorry We Missed You" note with the date, time, their name and the Touchpaper ticket number. The analyst will indicate on the left side of the note that the problem has been resolved and to please call the ITSC if they need further assistance.
8	The assigned analyst enters a **Resolution** into the ticket. The Resolution will be a detailed explanation of the fix to the reported problem. After the resolution is completed, the analyst will reassign the ticket to **QA-ITSC**.
9	**QA-ITSC** performs a quality assurance call back to the user. The QA analyst enters the user's feedback into the QA-ITSC assignment window.
10	**QA-ITSC** closes the Touchpaper ticket.

3.11 Client History Lookup Procedure

Phone support analysts will ask the user as part of their call script "Is this a recurring problem?", "Have you had this problem before?", or "Have you opened a ticket with us before for this same problem?"

Five business days will be the time frame **ADMIN-ITSC** will use to determine if a previous ticket for the same problem should be reopened. Desktop analysts will also have the responsibility of doing client history look-ups for Normal tickets. We know this is not possible with Urgent tickets due to the time constraints. As part of your ticket assignment responsibility, you are to perform a client history lookup so you have some knowledge about the user and the calls that he or she may have to the IT Support Center in the past.

Having the desktop support analyst perform this extra step ensures that assigned analysts have a clear understanding of what the user is or has been having problems with. This ultimately benefits the assigned analyst and shows the user that the analyst is prepared to handle their problem and the assigned analyst is aware of their previous problems

The client lookup can be done by clicking the **Quick Lookup Calls by Specified Customer** button  on the Touchpaper toolbar once the user's name has been entered in a new ticket.

3.12 Blanket Ticket Procedure

Periodically a user will call the IT Support Center reporting a problem. Then several other users call reporting the exact same problem. Examples: no internet access, server outage, MS Outlook unavailable, etc. Blanket tickets will only be used if five or more users are reporting the exact same problem.

The procedure below will be used by the IT Support Center for entering Blanket Tickets into Touchpaper.

Step	Action
1	Open a Touchpaper ticket.
2	Enter the description of the problem the user(s) are reporting.
3	Enter the applicable Ticket Type, Sub Type and Sub Type 2 (if listed) Example: **INHOUSE_APPS, FAMIS**
4	Set the ticket priority to **BLANKET**.
5	Reassign the ticket to **ADMIN-ITSC**.
6	**ADMIN-ITSC** will create a new assignment for the ITSC group.
7	The originating analyst will enter a Response Note into the ticket and work to resolve the ticket.
8	**ADMIN-ITSC** will email the IT Support Center staff with the Touchpaper blanket ticket number and write the Touchpaper blanket ticket number on the white board in the IT Support Center.
9	When additional users call the IT Support Center to report the problem, the phone support analyst will enter a new ticket note for each caller using **STATUS-BLANKET**.
10	Enter the user's name, phone number and room number.
11	After the problem resolution has been reported, IT Support Center analysts will contact each user to verify problem resolution.

4.0 Service Level Agreements for Trouble Tickets

4.1 Service Level Agreements (SLA) For Trouble Tickets

The IT Support Center is the first level of support, where initial problem determination, analysis, and troubleshooting of a problem request is made. IT Support Center analysts are required to either make a desktop visit or remotely access the user's workstation for each call before passing the call to another group for resolution.

IT Support Center staff members are to respond to problems in the order in which they are reported with the exception of VIP and URGENT calls. Every effort must be made to resolve as many problems as possible during the initial contact with the user.

Tickets that cannot be resolved by an IT Support Center analyst are assigned to the appropriate support group through Touchpaper. The chart below shows the mandated Response and Resolution Service Level Agreement (SLA) times for trouble calls commencing from the time the IT Support Center receives the call.

Call Type	Response Time	Resolution Time
VIP and URGENT Call	**10 minutes**	**90 minutes**
NORMAL Call	**1 hour**	**1 business day (11 hours)**

Service levels for Response and Resolution have been defined for GDIT by FERC for Trouble Tickets. Service levels are set for each employee at FERC.

VIP users have a Service Level **(Priority)** of **URGENT.**

All other users have a Service Level **(Priority)** of **NORMAL.**

When a user calls to report that their problem is URGENT, the analyst taking the call manually changes the **Priority** of the ticket to **URGENT-PER-CLIENT.**

Definition of **Respond To**: called user left voice message, called the user and made appointment to visit the user today at 3:00 p.m., going to visit the user right now, resolved the problem directly with user over the phone or via SMS.

Definition of **Resolution**: once the assigned analyst fixes the problem the user was experiencing, it is his or her responsibility to update the Touchpaper ticket with the Solution to the problem.

4.2 How to Respond to an Assigned Ticket - Response SLA

Below are the instructions for **Responding** to a Touchpaper trouble ticket. Only one Response Note is entered per ticket.

THIS STEP IS EXTREMELY IMPORTANT This is what will be used to measure the **RESPONSE-SLA (Service Level Agreement)**. If this step is neglected, the ITSC Liaison must research the ticket and decide if the response was met. This is a manual process that is very time intensive.

Step	Action
1	Right-click on **TICKET NOTE** in the ticket.
2	Select **NEW** to open the Ticket Note window.
3	In the **CATEGORY** field begin typing **RESPONSE** or select it from the drop down list.
4	TAB to the **SUB-CATEGORY** field and either begin typing RESPONSE or select it from the drop down list.
5	TAB to the **NOTE** field. This field will automatically be populated. Enter information based on the type of response. Example, If a technician called the user and was asked to come to the user's office later in the day at (e.g., 3:30 p.m.), this information would be entered in the **NOTE** field.
6	Click **Update this NOTE**.
7	**Click OK** to exit the ticket

The ticket is now Date and Time stamped. This is what will be used to measure the **RESPONSE-SLA (Service Level Agreement).**

4.3 How to Status Your Assigned Tickets

It is very important to provide status updates to your assigned tickets. This is where you would indicate that you went to visit the user and they were in a meeting. If you called the user and left a voice-mail or sent them an E-mail you would status your ticket with that information. If the user asked you to come back at a later time after you made your initial visit to them, this is where you would status that information.

Step	Action
1	Right-click on **TICKET NOTE** in the ticket tree.
2	Select **NEW** to open the Ticket Note window.
3	In the **CATEGORY** field begin typing **STATUS** or select it from the drop down list.

4	TAB to the **SUB-CATEGORY** field and either begin typing or select **UPDATE** from the drop down list.
5	TAB to the **NOTE** field. This field will automatically be populated. Enter status information based on the type of update. Example, If a technician left a voice message for the user to request further information, this information would be entered in the **NOTE** field. It is extremely important that you update your tickets with this type of status information.

The ticket is now Date and Time stamped.

4.4 Ticket Note Category Table

Category	Sub-Category	Note
LOANER	**PROVIDED HARDWARE LOANED**	LOANER PROVIDED TO USER
REASSESSMENT	**ACTION TRACK**	ACTION TRACK #
	FAILED RESOLUTION	FAILED RESOLUTION
	FAILED RESPONSE	FAILED RESPONSE
	RESOLUTION	REASSESSMENT - RESOLUTION
	RESPONSE	REASSESSMENT - RESPONSE
RESOLUTION	**ACTION TRACK**	**ACTION TRACK #**
RESPONSE	**RESPONSE**	RESPONSE
STATUS	**A_TEAM**	A_TEAM- to handle difficult tickets
	A_TEAM EVALUATION	
	APPROVED	APPROVED
	BLANKET	BLANKET
	BROKEN	BROKEN
	CANCEL	CANCEL-Cancel call per user.
	CLIENT-COMMUNICATION	CLIENT COMMUNICATIONS
	COTS_COMMUNICATION	Information to be provided to COTS Admin account: • Ticket number • FERC Tag# • # of users affected • User specific (profile based)?

		• Sequence of events to receive error • Screen Shot of errors if possible. Exact error message if screen shot unavailable • Event Viewer errors and codes if available • Detailed list of troubleshooting actions taken.
	CUSTOMER_PROFILE	CUSTOMER PROFILE
	DISAPPROVED	DISAPPROVED
	EVALUATE	EVALUATE
	EXTENSION	EXTENSION
	INQUIRY	INQUIRY
	ON-HOLD	ON-HOLD
	ON-ORDER	ON ORDER
	PC_STAGING_INSTRUCT	PC STAGING INSTRUCTIONS
	RECEIVED	RECEIVED
	RESEARCH	RESEARCH
	RESOLUTION	RESOLUTION
	RETURN	RETURN
	RIGHTS	REQUIRED INFORMATION: • Name • FERC# • Task Description • Justification • Resource Owner • Supervisor's Name • Supervisor's Approval • Priority – Normal • Owner's Approval
	SCOPE_EFFORT	SCOPE EFFORT
	SECURITY_REVIEW	SECURITY REVIEW
	SOFTWARE_INSTALL	Installation of software
	TECHNICAL-ISSUES	TECHNICAL ISSUES
	TEST	TEST
	TICKET_REOPENED	TICKET REOPENED
	TICKET_REROUT	Ticket routed to someone

		else or another group.
	TRAINING	Customer Training
	TROUBLESHOOTING	Troubleshooting problem
	UPDATE	STATUS

4.4.1 Ticket Note Category -- Status--Evaluate

When an IT Support Center Analyst troubleshoots a problem and concludes that a hardware upgrade may be needed in order to eliminate the problem, the analyst will reassign the ticket back to **ADMIN-ITSC**. The ITSC Administrator will work with the General Dynamics IT Customer Support Manager to determine if a hardware evaluation is needed.

If the General Dynamics IT Customer Support Manager determines a hardware evaluation is needed, the trouble ticket will be changed to a Task for PC Staging to perform a hardware evaluation. The ticket will be changed to type **TASKING**, subtype **PC**, with priority set to **TASK**. An Action Track will be created with a description of **EVALUATE**. A three-day due date will be placed in the action track. The ITSC Administrator will reassign the ticket to the PC Staging Coordinator’s queue.

When PC Staging documents the ticket they will create a ticket note with the Category set to **STATUS** and Sub-Category set to **EVALUATE**. The ticket note requires the following information be entered;

- A listing of what software is installed on the hard drive and if it is executed from the network or locally.
- The size of the hard drive, and how much space is available on the hard drive.
- Amount of RAM in workstation.
- Type/model of workstation.
- Have user demonstrate how to run/manipulate the application that are causing the problem and attempt to replicate the problem.
- Provide DCIO Customer Support Task Manager with a written recommendation of what is needed to resolve the user's problems. Please be specific in your recommendation (i.e., Additional 512MB RAM, upgrade the workstation to a GX620).

Upon completion of the evaluation, PC Staging resolves the action track and reassigns the ticket to the ITSC Liaison for presentation to DCIO Customer Support Task Manager for approval or disapproval.

4.5 How to Reassign a Completed Ticket

In Touchpaper you have to **REASSIGN** the completed/resolved ticket to QA-ITSC first before you can **RESOLVE** the ticket. The instructions and illustration below explain this process.

Step	Action
1	Right-click on **YOUR ASSIGNMENT** on the ticket tree.
2	Select **REASSIGN**. You will be prompted with the message **"Are you sure you want to reassign this assignment?**
3	Select YES.
4	TAB to the **GROUP ID** field.
5	Begin typing **QA-ITSC**. Press TAB to fill in the field with QA-ITSC. DO NOT press ENTER. ENTER acts as SAVE in Touchpaper.
6	Place a **check (/)** in the **Return to Ticket** box on the ticket.
7	**Click OK** to return to the Ticket Details screen so you can RESOLVE your ticket.

4.6 How to Resolve a Completed Ticket - Resolution-SLA

Once you have assigned the ticket to **QA-ITSC** you will need to **RESOLVE** the ticket with your solution.

Step	Action
1	Right-click on **TICKET NOTE** in the ticket tree.
2	In the **CATEGORY** field begin typing **STATUS** or select it from the drop down list.
3	TAB to the **SUB-CATEGORY** field and either begin typing or select **RESOLUTION** from the drop down list.
4	TAB to the **NOTES** section and enter the information detailing how the issue was resolved.
5	**Click OK**.
6	Right-click on **RESOLUTION** in the ticket tree.
7	Select **RESOLVE**.
8	In the **DETAILS** window type the solution/resolution to the ticket. Please be very specific with solution information. This information will be useful to other analysts who may need to solve the same problem in the future. This information can be searched later by all analysts.
9	In the **RESOLUTION TYPE** drop down box select the method that was used to resolve the issue.
10	**Click OK**.

The ticket is now Date and Time stamped. This is what will be used to measure the **RESOLUTION-SLA (Service Level Agreement).**

The ticket will now leave the current queue and will be reassigned to the **QA-ITSC** queue for QA call back, grading and closure.

4.7 The 3-Strike Rule

The procedure below describes how to handle calls placed to the ITSC for service when the user does not return calls to the assigned analyst. The technician assigned to monitoring the **QA-ITSC** queue will close the ticket. A Ticket Note of **STATUS/UPDATE** will be used with the wording 3-Strike Rule.

When a user calls the ITSC for service, a Touchpaper trouble ticket is opened. It will be reassigned to an analyst from the **ADMIN-ITSC** queue. It is the responsibility of the assigned analyst to respond to the trouble ticket using the Ticket Note Category of **RESPONSE/RESPONSE**. The analyst attempts to

contact the user and set up a time to meet with the user to resolve his or her problem. If the assigned analyst gets the user's voicemail, the analyst will leave a voice mail message for the user asking to be called back to set up an appointment time. This will satisfy the **Day One Response**.
2nd day - If the user did not call back the same day the call was placed, it is the responsibility of the assigned analyst to call the user again on the second day. A voicemail message will be left if the user is unavailable. Use Ticket Note **STATUS/UPDATE** to indicate that the user was called and a voicemail message was left asking the user to respond. Only **one** call needs to be placed to the user the second day.

3rd day - If the user did not return the call on the second day, it is the responsibility of the assigned analyst to call the user again on the third day. A voicemail message will be left if the user is unavailable. Use Ticket Note **STATUS/UPDATE** to indicate that the user was called and a voicemail message was left asking the user to respond. Only **one** call needs to be placed to the user the third day.

4th day - On the fourth day of a call being placed to the IT Support Center with no response back to the assigned analyst, the analyst will:

- Create a 4th Ticket Note using **STATUS/UPDATE**. Use the wording **3-Strike Rule.**
- Reassign the ticket to the **ADMIN-ITSC** queue.

4.7.1 Standardized Email Sent to DCIO Customer Support Task Manager from the IT Support Center E-mail Account

Touchpaper ticket number XXXXX was opened for user (first and last name). The user has not responded to the assigned analyst. The assigned analyst (first and last name) called the user three times with no response back from the user. We are going to close this ticket. If the user does call us back, we will reopen this ticket.

Using the ADMIN-ITSC queue, the IT Support Center Admin will:

- Create a 5th ticket note **STATUS/CANCEL**.
- Copy the text of the email sent to the DCIO Customer Support Task Manager into the ticket note.
- Reassign the ticket to **QA-ITSC** for closure.
- Resolve the ticket with the text of the email sent to the liaison using the Resolution Type N/A.

4.8 Urgent Trouble Ticket Call Types

The following calls are considered URGENT Calls.

- Calls from FERC VIPs or someone calling on behalf of a VIP
- Calls from the FERC Regional Offices

Note: The above two call types will automatically come up with an **URGENT** Priority in Touchpaper. VIPs will have a **check (/)** in the **VIP!** box on the Ticket Details screen.

- Cannot Log On To the LAN
- Loss of computer functionality (where one of the following is not responding)
  - CPU
  - Keyboard
  - Monitor
  - Mouse
- Computer Virus
- LAN Printers out of toner
- High Speed Scanners
- Universal System Outages (an outage that affects multiple users)
- E-Filing
- MMC (Market Monitoring Center) trouble tickets

4.9 Urgent-Per-Client Trouble Tickets

There may be times when a user calls the IT Support Center and states that their request is URGENT or that they NEED ASSISTANCE ASAP even though it is not one of the normal URGENT call types. Follow the procedure listed below for these instances:

Step	Action
1	The analyst taking the call from the user will enter the verbiage: **"URGENT CALL PER USER"** This will be the very first line in the Description field. Continue to describe the problem the user is reporting in the Description field.
2	Change the **PRIORITY** of the ticket to **URGENT-PER-CLIENT**.
3	**ASSIGN** (Assignments/New) the ticket to **ADMIN-ITSC**.
4	Immediately notify **ADMIN-ITSC** that an URGENT ticket is being reassigned to the queue.
5	The same SLA is applied to this ticket as any other URGENT ticket.

4.10 Grading Touchpaper Trouble Tickets

The only GDIT Trouble Tickets that will be evaluated for SLA compliance reassessment are those that miss the SLA(s) (Response or Resolution or both) per the system report. These tickets will be reviewed by the ITSC Liaison. If there is no valid justification why the SLA was missed, the ITSC Liaison will check the applicable Concur With Failed Response or Resolution blocks. If a valid justification exists, the ITSC Liaison will reassess the ticket with a Reassessment ticket note and check the applicable Reassessed Response or Resolution blocks.

Tickets are graded on the Response and Resolution SLA based upon the priority of the ticket. Please refer to Section 4.6 - Service Level Agreements (SLA) for Trouble Tickets.

Response SLA is calculated from the **ADMIN-ITSC** Assignment to the Ticket Note-RESPONSE.

Resolution SLA is calculated from the **ADMIN-ITSC** Assignment to the Resolution Note.

The Responsible field will indicate which group is responsible for resolving the problem. Possible values for the Responsibility field will be:
- QA AAC
- QA DECISION ONE
- QA FERC
- QA JOINT
- QA NA
- QA SIGNAL

Joint Trouble Tickets include those tickets that need to be passed between GDIT and FERC in order to be resolved. These tickets may include problems involving user IDs and certain COTS applications. These tickets will have QA-Joint in the Responsible field.

4.11 Ticket Note Category - Reassessment

The ticket note category of **Reassessment** will only be used by **QA-ITSC** or **QA-PC Staging** who grades the GDIT trouble tickets and tasks. If an SLA is missed with reason, the ITSC Liaison will document what happened with detailed information as to why the SLA was missed in the Reassessment ticket note. The DCIO Customer Support Task Manager will review the ticket and then make the final decision on how the ticket should be graded.

Category	Sub-Category	Note:
REASSESSMENT	ACTION TRACK	ACTION TRACK #
	FAILED-RESOLUTION	FAILED RESOLUTION
	FAILED-RESPONSE	FAILED RESPONSE
	RESOLUTION	REASSESSMENT
	RESPONSE	REASSESSMENT

To reassess a closed trouble ticket, follow the steps below:

Step	Action
1	Right-click on **Resolution**.
2	Select on **Reopen**. A message stating that the ticket has been re-opened will appear.
3	Click **OK**.
4	To reassess a **Response**, right-click on **Ticket Note**.
5	Select **New.**
6	Under Category choose **Reassessment**
7	Under Sub-Category choose **Response**.
8	In the **Note** field type the documentation that applies to the missed SLA.
9	Click **Update this Note.**
10	To reassess a **Resolution**, right-click on **Ticket Note**.
11	Select **New.**
12	Under Category choose **Reassessment**
13	Under Sub-Category choose **Resolution**
14	In the **Note** field type the documentation that applies to the missed SLA.
15	Click **Update this Note**.
16	Right-click on **Resolution**.

17	Select **Close**.
18	For a **Response** reassessment, in the Response Box place a check (/) in **Concur with Failed Response** or **Reassessed Response**.
19	For a **Resolution** reassessment, in the Resolution Box place a check (/) in **Concur with Failed Resolution** or **Reassessed Resolution**.
20	Click **OK**.

To reassess a closed task ticket, follow the steps below:

Step	Action
1	Right-click on **Resolution**.
2	Select on **Reopen**. A message stating that the ticket has been re-opened will appear.
3	Click **OK**.
4	Right-click on **Ticket Note**.
5	Select **New.**
6	Under Category choose **Reassessment**
7	Under Sub-Category choose **Action Track**.
8	Right-click on **Resolution**.
9	Select **Close**.
10	In the Resolution Box place a check (/) in **Concur with Failed Resolution** or **Reassessed Resolution**.
11	Click **OK**.

5.0 Entering Requests for Processing

5.1 Entering Urgent Trouble Tickets

The following information is what constitutes an **URGENT** ticket in Touchpaper. What is listed below is the Ticket Type, Sub Type and Sub Type 2 for URGENT Trouble Tickets. There may be some instances where there is no Sub Type 2 listed. If there is not a Sub Type 2 listed, the field will be blank.

After entering all of the ticket information, ASSIGN (Assignments/New) the ticket to **ADMIN-ITSC**. **Immediately** notify the ITSC Administrator that an URGENT ticket has been assigned to the queue.

Call types to the ITSC that constitute an **URGENT** Trouble Ticket:

X Call from a **VIP** (or a call made for them by someone else). Enter call under VIP's name.
Touchpaper has automatically set their **Priority** to URGENT.
VIPs will have a **check (/)** in the **VIP!** box on the Ticket Details screen.

X Call from a **Regional Office user**.
Touchpaper has automatically set their **Priority** to **REGION**.

Phone Support Analysts will need to change the **Priority** to **URGENT** for **all** of the Urgent Ticket Type Items listed below. Touchpaper will not automatically do this.

INHOUSE APPS
- E-Filing

NETWORK
- Log In - Cannot Log In

HARDWARE
- CPU, Keyboard, Monitor, Mouse - Not Responding

HARDWARE
- Printer – Toner (LAN Printers)
- Scanner - High Speed

VIRUS
- CPU - Detected
- Network - Detected

5.1.1 Urgent Trouble Ticket Table

Response SLA – 10 minutes **Resolution SLA – 90 minutes**

Request Type	Ticket Type	Sub Type	Sub Type 2	Priority
CANNOT LOG ON TO LAN	NETWORK	Cannot Log In	None Listed	**URGENT**
LOSS OF COMPUTER FUNCTIONAL-ITY	HARDWARE	CPU-Not Responding Keyboard-Not Responding Monitor-Not Responding Mouse-Not Responding Scanner-High Speed		**URGENT**
VIRUS	VIRUS	CPU Network	Detected Detected	**URGENT**
COTS APPS	COTS APPS	PeopleSoft	Choose from List	**URGENT**
LAN PRINTER OUT OF TONER	HARDWARE	Printer	Toner	**URGENT**
VIP	Any type of call from a VIP or made on behalf of a VIP is URGENT. Enter the call under the VIP's name. VIP's will have a Tin the VIP Box on the Ticket Details screen. Their priority will already be set to URGENT.			**URGENT**
REGIONAL OFFICE USER	Any type of call from a Regional Office user is URGENT. Their priority will already be set to URGENT.			**URGENT**
URGENT CALL PER USER	When a user calls and states that their problem is urgent or that they need help ASAP, treat the call as an URGENT ticket. Fill out the Ticket Type, Sub Type and Sub Type 2. Change the PRIORITY of the ticket to URGENT. The first line in the description will be "URGENT CALL PER USER".			**URGENT-PER CLIENT**

5.2 Urgent Trouble Ticket Example

Priority:	URGENT
SLA:	Response Time: 10 minutes
SLA:	Resolution Time: 90 minutes

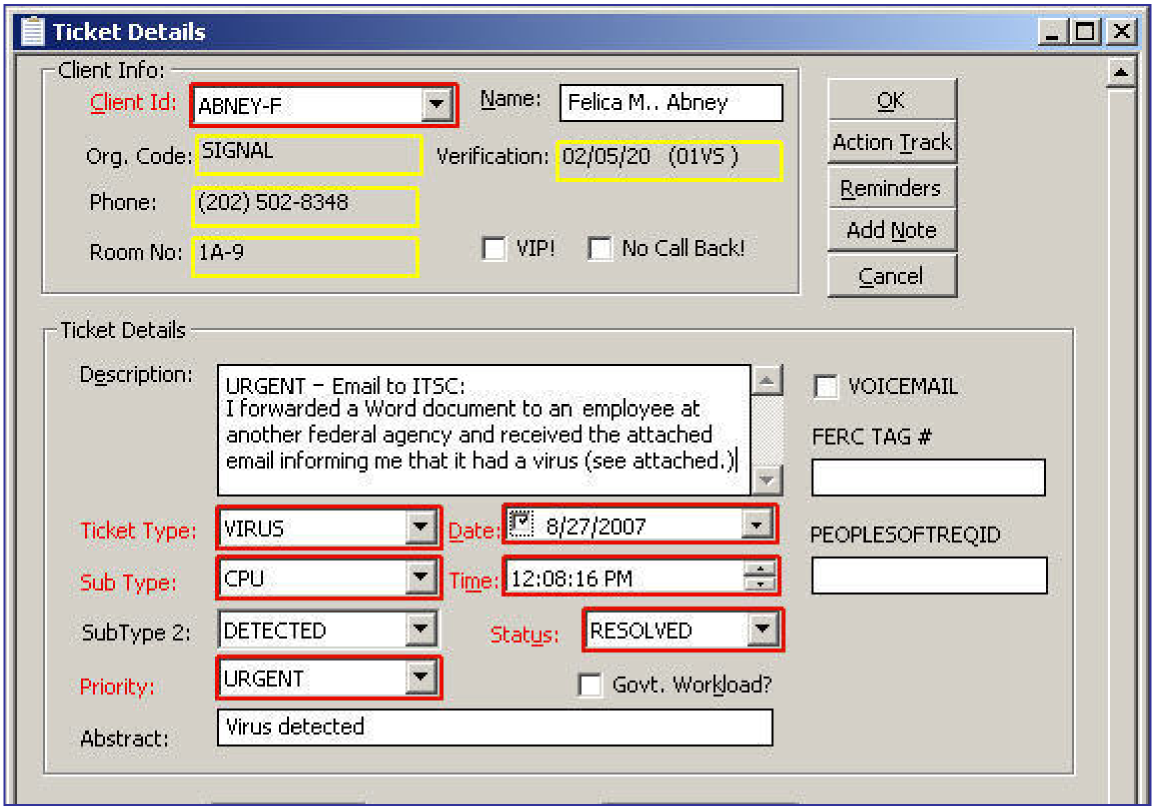


Fig. 5.1: Urgent Trouble Ticket

5.3 Urgent-Per-Client Trouble Ticket Example

Priority: URGENT-PER-CLIENT
SLA: Response Time: 10 minutes
SLA: Resolution Time: 90 minutes

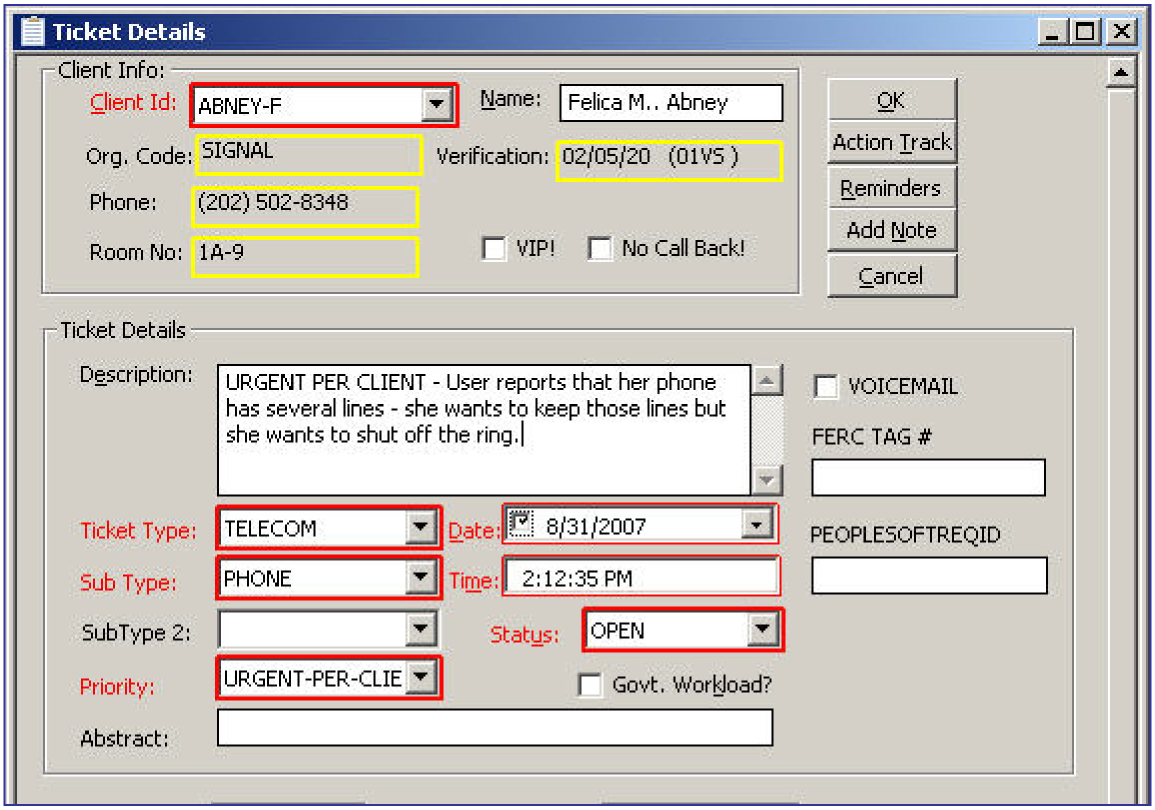


Fig. 5.2: Urgent-Per-Client Trouble Tickets

5.4 Normal Trouble Ticket Example

Priority:	NORMAL
SLA:	Response Time: 60 minutes
SLA:	Resolution Time: 1 business day (11 hours)

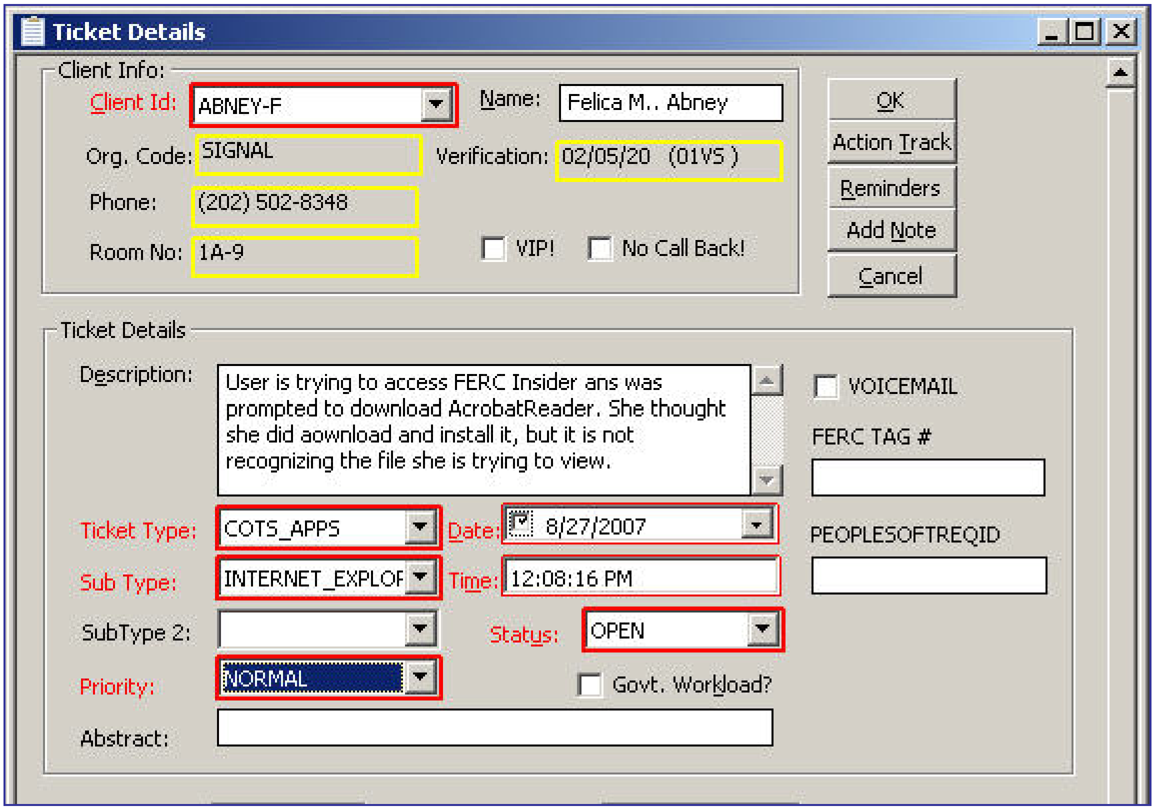


Fig. 5.3: Normal Trouble Ticket Example

5.5 Processing Requisitions

Requisitions are submitted to the IT Support Center to request ADP hardware, software, and telephone work. (Please refer to the Touchpaper SOP for detailed instructions on entering Requisitions into the Touchpaper system).

PeopleSoft is the tool that is used to enter Requisitions. Hard copies of the requisitions will no longer need to be delivered to the ITSC. If a hard copy comes to the ITSC, GDIT is to deliver the hard copy to ITSC Liaison. The hard copy is not to be entered into Touchpaper. The E-Mail that is generated from PeopleSoft after the Requisition data is entered is what is to be entered into Touchpaper.

Administrative Officers or their office designates will enter the Requisition into PeopleSoft.

Once all information is entered, PeopleSoft will generate an E-Mail to the IT Support Center E-Mail account with the entered information.

The ITSC will enter the PeopleSoft Requisition E-Mail data from the sender into a Touchpaper ticket. The ticket will be entered under the name of the user receiving the requisitioned item. If no user is listed, the requisition will be entered under the name of the sender of the message. The ITSC will include the requisition number on the TP ticket by completing the PeopleSoft Req ID field. The Touchpaper ticket number is placed in the lower left hand corner of the hard copy of the requisition to be used as a cross reference.

DCIO generated requisition will be reassigned directly to the DCIO point of contact for the item requested.

COTS Task Manager – Software
PC Staging Task Manager – Hardware
Telecommunications Task Manager – Telecommunications

Once the requisition has been approved and ordered, the requisition is reassigned back to QA-ITSC for closure.

Requisitions for Furniture/Office Supplies are not to be logged into Touchpaper. Notify the requestor that the requisition was submitted to the wrong office and forward the request to the Logistics Management Helpline (DLM).

5.5.1 What the PeopleSoft Requisition E-Mail Must Contain

The Requisition E-Mail that is sent to the IT Support Center from PeopleSoft must contain the following information:

- Requisition Number

- Description of Item
- Quantity of Item
- Business Justification for Item
- Who the Item is For

If a Requisition does not contain the information listed above, the ITSC Liaison will reply to the Sender of the Requisition, asking them to provide the information that is missing (e.g., Requisition Number, Description, Justification, and Recipient of the Item).

Indicate in the E-Mail that the Requisition cannot be processed until all of this information is received.

5.5.2 E-Mail Template to User Requesting Additional Information

> Good Morning/Afternoon:
>
> The IT Support Center received the notification of the requisition below from you. We are unable to begin processing of the Requisition because the following information is missing:
>
> *[Indicate to the user what information is missing and ask that they provide that information (e.g., justification, and for whom.)]*
>
> As soon as we receive the missing information, we will start the requisition approval process.

Fig. 5.4: Additional Information Email Example

5.6 Requisition versus E-Mail for Service

Listed below is the policy which provides guidance in regards to when to submit a requisition or an E-Mail for ADP and Telecommunications related services. All requisitions or E-Mails should be submitted to the IT Support Center.

5.6.1 Requisition

- Computer Upgrades (outside of refresh schedule)
- Hardware Peripherals (i.e., memory, hard drives)
- Monitors
- Glare Screens
- Laptops
- Printers
- Software
- Software Development
- Training Development
- Additional Phone Line or Modem Line

- Telephone Upgrades
- Cell Phones
- Fax Machines
- Telephone Peripherals (i.e., headsets)
- Blackberries/PDAs

5.6.2 Email

- Computer Moves (no change of ownership/no files need to be transferred)
- Computer Requests for New Hires (requires FERC User ID Form)
- Telephone Requests for New Hires (requires FERC User ID Form)
- Move Existing Telephone Line
- Change Phone Features to an Existing Phone
- Notification of Employee Separation
- Conference Call Assistance
- Speakers

5.7 DCIO PeopleSoft Procedures

Administrative Officer or designee prepares requisition in PeopleSoft and selects CIO as the work flow route and saves as pending approval. This action generates an email to the IT Support Center notifying them of the new requisition. The ITSC reviews the email for appropriate content (i.e., requisition number, description of item, justification, and delivery point-of-contact) and creates a Touchpaper (TP) ticket. If all information is not available from the email, the ITSC Liaison will email the requestor and ask to be provided the missing information. Once all information is obtained and entered into TP the ticket is reassigned to the appropriate DCIO Requisition Lead.

The TP number is written on the hard copy of the requisition. The ITSC Liaison then hand carries the requisition to the appropriate DCIO Requisition Lead. The liaison also updates and reassigns the TP ticket to the DCIO Requisition Lead. Once the DCIO Requisition Lead has approved the requisition, they will hand carry the requisition to the appropriate Director for funds approval. If funds are available, the Director signs the requisition, puts the Line Item number from the FY 200_ Budget Spreadsheet on the requisition and it is delivered to the Central Money Manager (CMM), for further PeopleSoft processing and ordering. The DCIO Requisition Lead also updates and reassigns the TP ticket to the CMM.

If the DCIO Requisition Lead can fulfill a requisition from existing stock, meaning the requisition is zero-cost, the requisition is not forwarded to the CMM. Instead, the DCIO Requisition Lead updates the TP ticket and sends an email to the CMM that the requisition is zero cost and to close out the requisition in PeopleSoft.

5.7.1 Program Office Requisitions

A Program Office determines a need for an information technology item and the Administrative Officer (AO) enters the request into PeopleSoft with workflow route to CIO.

The ITSC receives an email notification of the new requisition in PeopleSoft, creates a TP ticket, and assigns it to the ITSC Liaison. The ITSC also emails the requestor and cc: the ITSC Liaison notifying them that a ticket was opened for the requisition and provides the TP ticket number. If all information is not available from the email, the ITSC Liaison will email the requestor and ask to be provided the missing information.

If the ITSC receives a hard copy of a program office requisition, they will not enter it into TP but deliver the hard copy to the ITSC Liaison. The liaison will give the requisition to the appropriate DCIO Requisition Lead, who will then notify the office of the proper procedures.

Now that the liaison has received notification from the ITSC that a program office requisition has been assigned to them, the liaison will go into PeopleSoft and print out a hard copy of the requisition and note the TP ticket number on the requisition. The liaison will review the requisition for appropriate content and if they think the purchase is valid will deliver to the appropriate DCIO Requisition Lead for approval. If approved the DCIO Requisition Lead hand carries the requisition to the appropriate DCIO Director for funds approval. If funds are available, the Director signs the requisition, puts the Line Item number from the FY 200_ Budget Spreadsheet on the requisition and it is delivered to the CMM for further PeopleSoft processing and ordering. The DCIO Requisition Lead also reassigns the TP ticket to the CMM for further PeopleSoft processing and ordering. After hardware items have been ordered and received, the original requisition and TP ticket are reassigned to the PC Staging task manager for delivery. All items are delivered to the user via TP tasking.

If the DCIO Requisition Lead can fulfill a requisition from existing stock, meaning the requisition is zero-cost, the requisition is not forwarded to the CMM. Instead, the DCIO Requisition Lead processes the TP ticket and sends an email to the CMM that the requisition is zero cost and to close out the requisition in PeopleSoft.

5.7.2 Requisitions Generated by GDIT

GDIT Support Staff enters the requisition into PeopleSoft. The requisition should contain the following information: Description of item, cost, vendor and detailed justification.

The ITSC receives email notification of the new requisition in PeopleSoft, creates a TP ticket, and assigns it to the ITSC Liaison. The ITSC also emails the requestor and cc: the ITSC Liaison notifying them that a ticket was opened for the requisition and provides the TP ticket number. If all information is not available from the email, the ITSC Liaison will email the requestor and ask to be provided the missing information.

GDIT Support Staff will print out a hard copy, write the TP number on the requisition and hand carry to the ITSC Liaison.

The liaison will review the requisition for appropriate content and if they think the purchase is valid will deliver to the appropriate CSS Hardware or Software Task Manager for approval. If approved the CSS hand carries the requisition to the appropriate DCIO Director for funds approval. If funds are available, the Director signs the requisition, puts the Line Item number from the FY 200_ Budget Spreadsheet on the requisition and it is delivered to the CMM for further PeopleSoft processing and ordering. The CSS also reassigns the TP ticket to the CMM for further PeopleSoft processing and ordering. After items have been ordered and received, the original requisition and TP ticket are reassigned to the appropriate CSS for delivery. All items are delivered to the user via TP tasking. After issuing the task or completing the ticket, the CSS is responsible for ensuring an official signed copy of requisition along with all supporting documentation is kept. The CCM is responsible for maintaining the official program office requisitions.

If the CSS can fulfill a requisition from existing stock, the requisition is not forwarded to the CMM. Instead, the CSS processes the TP ticket and sends an email to the CMM that the requisition is zero cost at this time and to close out the requisition in PeopleSoft.

5.7.3 Telecommunications Requisitions

ITSC receives PeopleSoft generated email and enters information into TP. ADMIN-ITSC will reassign the Requisition to the ITSC liaison. The person entering the requisition information into the TP ticket will send an E-Mail from the IT Support Center to the requestor and the ITSC liaison notifying them that the ticket was opened for the requisition and what the TP ticket number is. The liaison will reassign the ticket to the telecommunications specialist. The TP ticket is updated and reassigned to CMM for further PeopleSoft processing and ordering along with hard copy of the requisition. After items have been ordered and received, the requisition and TP ticket is reassigned to the appropriate TS. The TS ensures the products are given to user. The TS is responsible for maintaining all official telecommunications requisitions.

5.7.4 Requisition Ticket Example

Ticket Type: REQUISITIONS
Sub-Type: Deployment, Hardware, Software, Subscriptions, Telecom, Other
Sub-Type 2: Relates to Sub Type chosen
Priority: REQUISITION

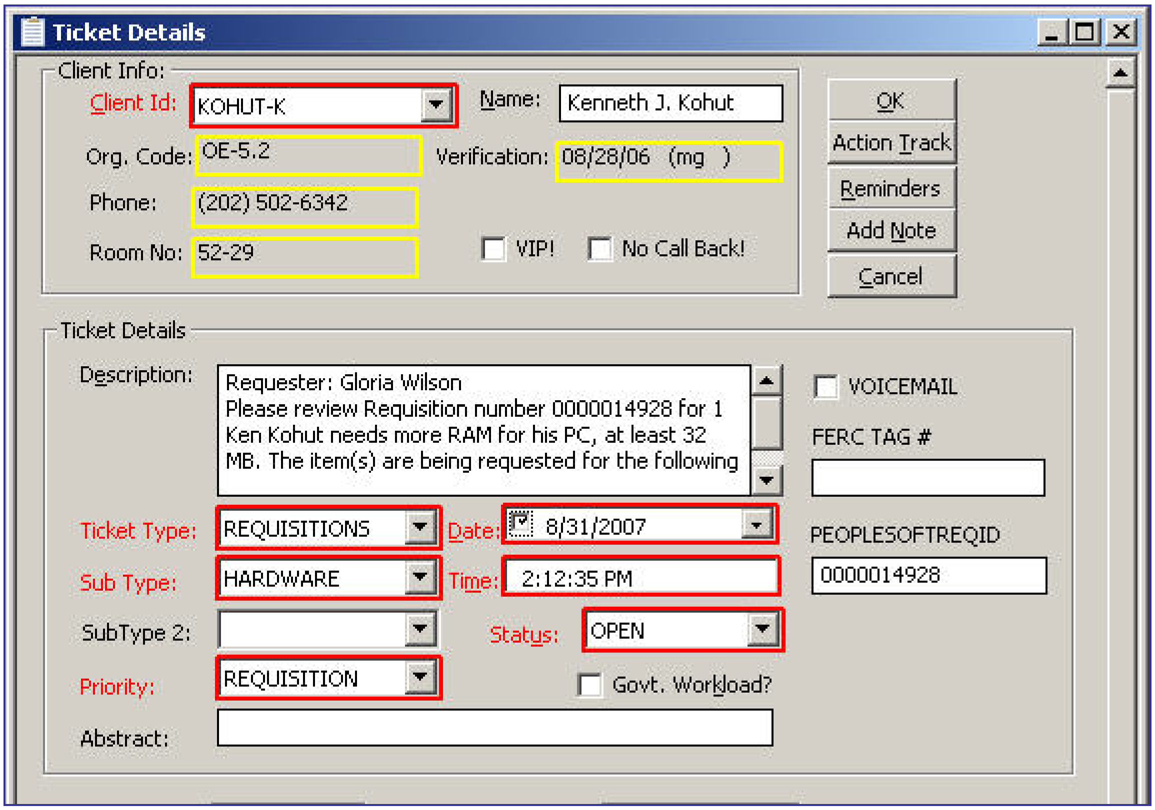


Fig. 5.5: Requisition Ticket Example

5.8 Requisition Request E-Mail Sent to AO and Contact Person

The IT Support Center will send an email to the Administrative Officer and Contact Person once their requisition is entered into Touchpaper. It should contain the following information:

- The Touchpaper Ticket Number
- The Requisition Number
- Brief description of what is being requisitioned
- Who the hard copy of the Requisition was reassigned to

5.9 Entering Transfer of Property (TOP) Requests

If a hard copy of a TOP is received by the IT Support Center the TOP is date-stamped by the Switchboard Operator and hand delivered to the ITSC Administrator. Otherwise all TOP requests will come in via email. The TOP or E-MAIL is entered into Touchpaper under the Ticket Type of **TASKING** with a Subtype of **PC**. The Priority is changed to **TASK**. The Due Date in the Action Track is set to expire after three working days. The Touchpaper ticket number is placed in the lower left hand corner of the TOP to be used as a cross reference. The hard copy is placed in the PC Staging box in the IT Support Center. The Touchpaper ticket is assigned to the **ADMIN-ITSC** who reassigns the ticket to PC Staging.

5.9.1 Transfer of Property (TOP) Ticket Example

Ticket Type: TASKING
Sub-Type: PC
Sub-Type 2: TOP
Priority: TASK

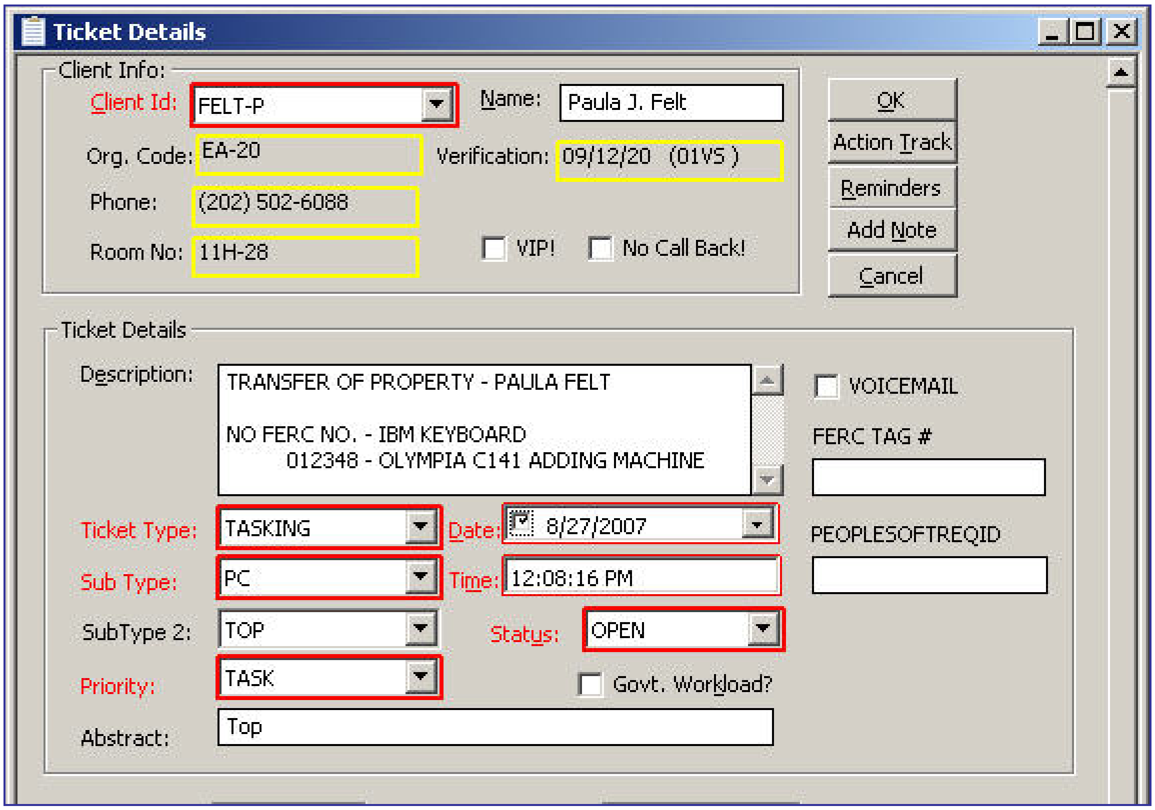


Fig. 5.6: Transfer of Property (TOP) Ticket Example

5.10 Entering Non Trouble Ticket Requests

Non Trouble Requests for Service are defined as follows:

- IT Resource Center Requests
- Network Engineering Outlook and Active Directory modification tickets
- All Systems Engineering tickets
- Conference Calls

Examples of how to enter Requests for the IT Resource Center, Network Engineering and Systems Engineering follow on the next several pages.

5.11 Entering IT Resource Center Requests

When FERC users need to check out hardware they can come to the IT Resource Center and request these items. Additionally, users can ask for assistance with:

- Scanning documents
- Printing files to the color printer or network printer
- Working with new software applications installed on the IT Resource Center workstations
- Configuring a laptop for using remote dial-in services.

When any of these services are requested, a Touchpaper ticket is opened to reflect the request from the user. The Ticket Type of ITSC_LAB is used with the appropriate Sub Type and Sub Type 2.

5.11.1 IT Resource Center Ticket Example

Ticket Type:	ITSC_LAB
Sub Type:	CD_BURNING, PRINTING, SCANNING, TRAINING
Sub Type 2:	None Listed for any Sub Types
Priority:	NON TROUBLE

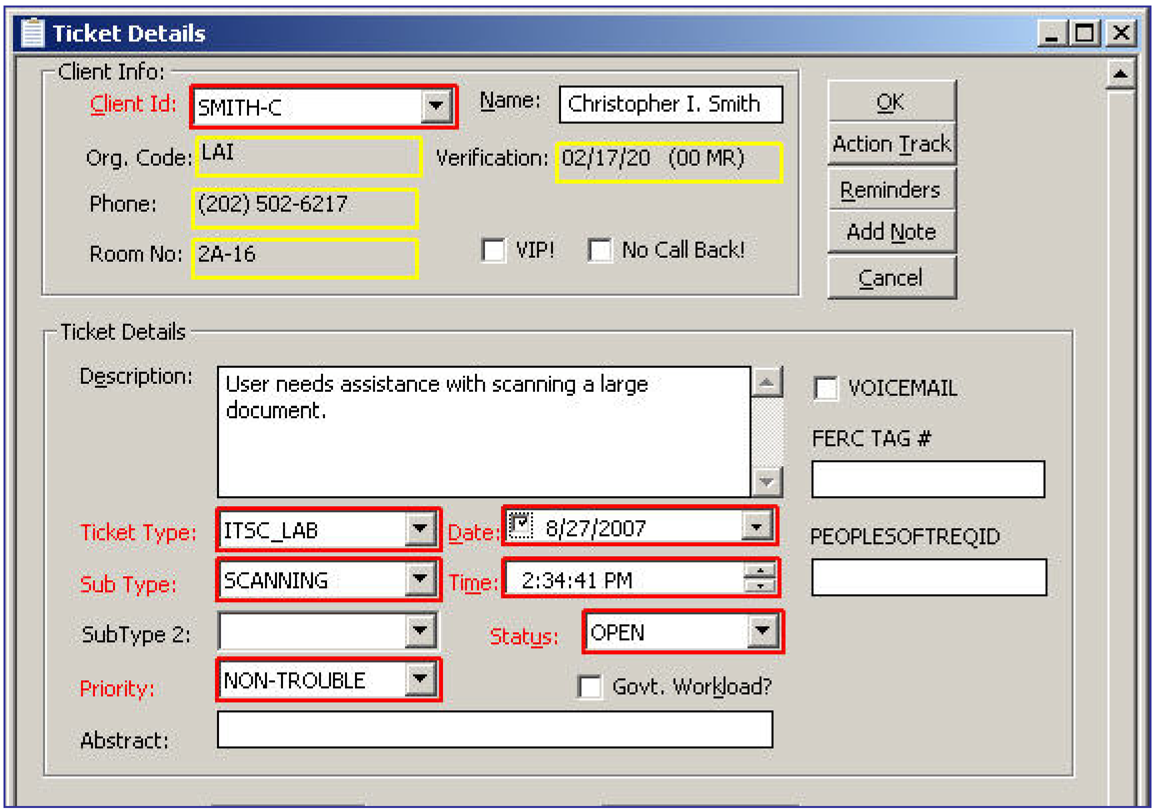


Fig. 5.7: IT Resource Center Ticket Example

5.12 Entering Conference Call Requests

The telephone operator sets up conference calls for FERC users who E-Mail the IT SUPPORT CENTER E-Mail account with the following information:

- Date and time of call. Time of call must include start and finish times (e.g., 2:00 p.m. to 4:00 p.m. Eastern Standard Time).
- Name of the Leader.
- Number of telephone lines needed.
- User will be asked if a Passcode is needed if not one will be assigned.

5.12.1 Conference Call Ticket Example

Ticket Type:	CONFERENCE CALL
Sub-Type:	SET UP
Sub-Type 2:	EXTERNAL
Priority:	NON TROUBLE

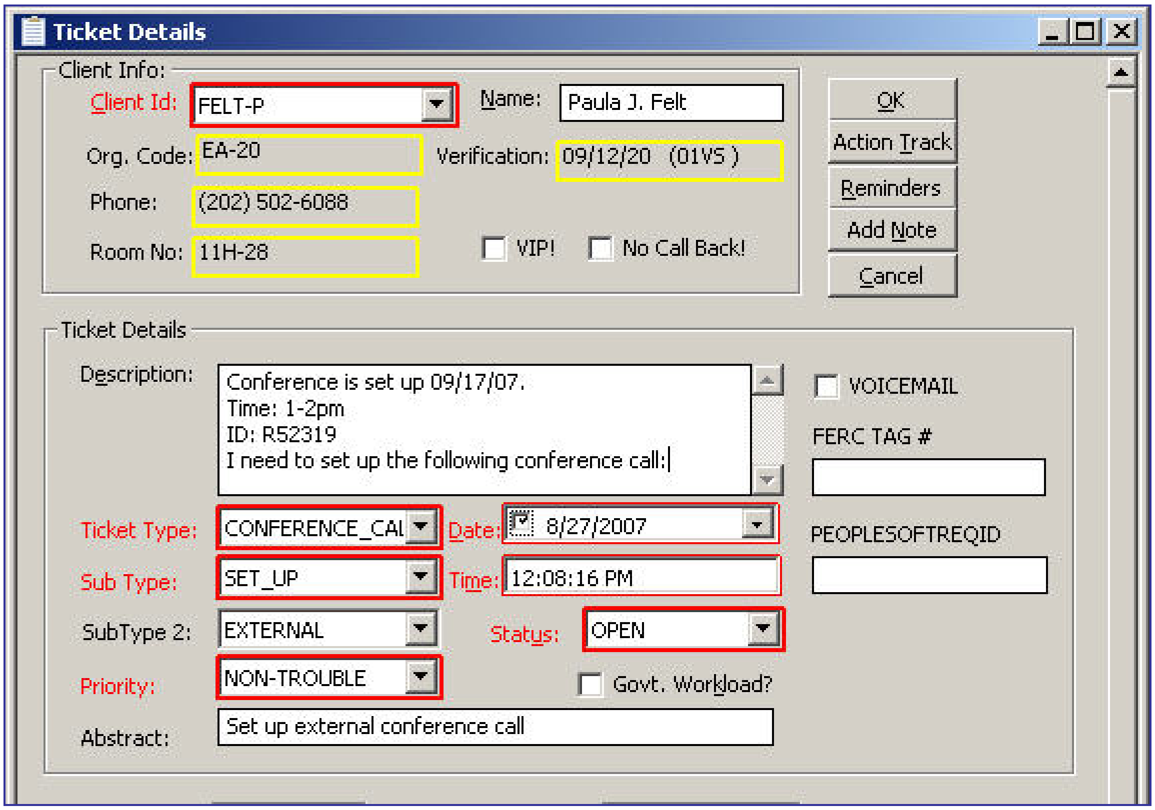


Fig. 5.8: Conference Call Ticket Example

6.0 Entering Tasks

Touchpaper will be used for task tracking for Network Engineering, Operations, PC Staging, Systems Engineering, SIGNAL-COTS, SIGNAL-Mail Team, and SIGNAL-Graphics/Web. The following procedures have been written to provide basic information and instructions for creating and opening a new task; creating action tracks; assigning the task; statusing the task; completing and closing the task. The core information regarding a task will be contained in the detail portion of the ticket. Due dates and assignments will be entered as Action Tracks and linked to the initial ticket.

6.1 Creating a New Task

Task managers are responsible for opening, creating action tracks, assigning, and closing tasks.

Step	Action
1	Click on the **CREATE A NEW TICKET** icon on the Touchpaper toolbar.
2	Select a client.
3	Change the Priority to Task
4	Fill out the required information such as description and due date in the Description box.

6.2 Tasking Ticket Type and Sub Types

The tasking **Ticket Type**, **Sub Type** and **Sub Type 2s** are listed below. The **Priority** of **TASK** is used for tasks that are entered. This needs to be changed manually by the person entering the Task.

Ticket Type	Sub Type	Sub Type 2
TASKING	COTS	SECURITY_PATCH
	ITC	
	ITSC	W2K-TEST
	NE	MOP
	OP	

	PC	CD_ROM_DRIVE CPU DOCUMENTATION FAX_MACHINES HAND_HELD_DEVICES HARD_DRIVE INTERNAL_CARDS JAZ_OR_ZIP_DRIVES JUKEBOX KEYBOARD LAPTOP MAINTENANCE MODEM MONITOR MOP MOUSE NETWORK_HARDWARE OTHER PRINTERS REIMAGE SCANNERS SOFTWARE SPEAKERS TOP WORKSTATION
	PC_ENGINEERING	IMAGING NON_STANDARD_SFTWARE SECURITY_PATCH
	SE	
	SECURITY	
	SIGNAL MGMT	
	SYSTEMS_ASSURANCE	
	TRAINING	
	WEB	

6.3 Creating Action Tracks for a Task

Action Tracks are used to put in a **Due Date** for an assigned Task. The Due Date is filled out in the Description field and in the Due Date field.

Step	Action
1	Right-click on **Action Track**.
2	Select **New**.
3	In the Action Track window, click on the **Action Type** field.
4	Choose the action type that fits the task being entered.
5	In the **Description** field type the **Due Date** of the task **Note**: Most PC Staging tasks have a 3-day action track

6.4 Completing a Task

Once a task has been completed:

- The assigned analyst should Reassign the ticket to **QA-ITSC** and Resolve the Task with a Resolution.
- PC Staging tasks are reassigned to **QA-PC-STAGING** to monitor for grading and closure.

6.5 Closing a Task

The assigned Quality Assurance analyst is responsible for closing all tasks (with the exception of PC Staging tasks that are closed by the ITSC Liaison). If the Quality Assurance analyst needs to add comments or information to the task prior to closure, a new Ticket Note with the Category of Status is created and the analyst will add the information to the description field.

Step	Action
1	Click on Resolution
2	Click on Close. **Note:** All Action Tracks must be completed before a Task can be closed.

6.6 Entering Graphic Design Requests into Touchpaper

When users request graphics assistance, the IT Resource Center or IT Support Center will open a Touchpaper ticket with what the user is requesting and ADMIN-ITSC will reassign the ticket to the SIGNAL-GRAPHICS-WEB queue. This group will be responsible for working with the user and updating and resolving the Touchpaper ticket.

For graphics/presentations requests to the ITRC use:

- Ticket Type of **ITSC_LAB**
- Sub Type of **DESIGN**
- Priority of **TASK**

6.7 Entering User ID Requests

To gain access to the FERC network, a unique identification is required. This identification is known as a User ID. To receive a new User ID or for a modification to an existing one, the user submits a completed FERC User ID Request Form to the IT Support Center.

- The IT Support Center opens a Touchpaper ticket with the information that is on the FERC User ID Request Form. The New Employee Arrival Hot Topic button is used when entering these requests into Touchpaper.
- The Touchpaper ticket number is written in the top right corner of the Form for cross referencing.

6.7.1 User ID Ticket Example

Ticket Type: NETWORK ADMIN
Sub-Type: USER ACCOUNT
Sub-Type 2: CREATE (not mandatory)
Priority: NON TROUBLE

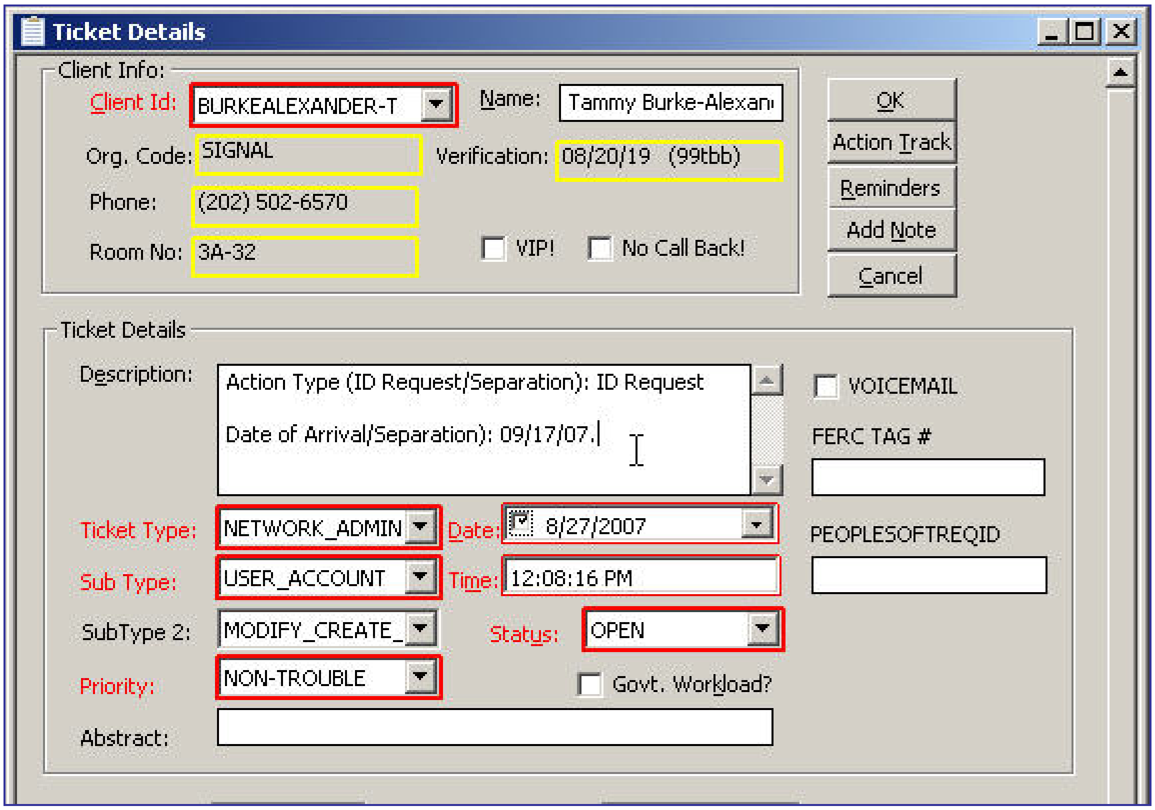


Fig 6.1: User ID Ticket Example

6.8 Processing Separation of Clearance

Employees and contractors leaving the Commission must be cleared through the IT Support Center (ITSC) for PC & Telecommunications related materials prior to departure. The process is initiated once an e-mail is received from an Administrative Officer notifying of a scheduled employee separation. This email should include the separating user's name, organization code, phone number, and room number.

Once this E-mail information is received from the Administrative Officer the following occurs:

- **ADMIN-ITSC** enters the separation of clearance information into a Touchpaper ticket using the Employee Separation Hot Topic Button.
- **ADMIN-ITSC** checks Touchpaper to see if the separating employee has any inventory checked out of the ITSC.
- **ADMIN-ITSC** enters a ticket note stating one of the following:
  - Employee has no ITRC inventory checked out.
    or
  - Employee has ITRC inventory checked out. Notifying AO.
- **ADMIN-ITSC** E-Mails the Administrative Officer with the Touchpaper ticket number and indicates one of the following in the E-Mail:
  - Employee has no ITRC inventory checked out.
    or
  - Employee has ITRC inventory checked out and we cannot clear the employee until the checked out items are received.
- The IT Support Center will provide the Administrative Officer with all the necessary information pertaining to the item(s) that are still on loan to the employee.
- The ticket is then reassigned back to **QA-ITSC** for closure once all action tracks are completed.