



San Rafael IT Help Desk Service Level Agreement

DRAFT

Contents

[Contents](#)

[SLA](#)

[Purpose](#)

[Tickets with Zendesk](#)

[Communication Standards](#)

[Emergency Support](#)

[Availability](#)

[Support Documentation](#)

[New Employee Training](#)

[Procurement](#)

[Reporting](#)

[Security Standards](#)

DRAFT

SLA

Purpose

- Create a shared environment for solving technology problems together.
- Provide a common understanding of IT's ability to provide support.
- Track support tickets with a goal of decreasing the number of tickets over time.
- Optimize IT response time. Minimize fragmentation of IT support efforts. Increase satisfaction with IT services.

Tickets with Zendesk

The IT Help Desk will:

- Keep track of open tickets through Zendesk software
 - Emails, phone calls and in-person requests will be entered into Zendesk for tracking and documentation
 - Tickets will contain (visible to customers and technicians):
 - Communication
 - Resolution
 - Root cause
 - Scheduling
 - Status
 - Priority
 - Estimated time to resolution
 - Assigned IT team member
- Prioritize tickets using the following guidelines
 - Normal - a problem that (a) does not inhibit the requester's ability to do their job or (b) is a request for new service/functionality not previously in production. The situation may certainly be an inconvenience that needs to be fixed but there is a work-around readily available to get the task done. Normal priority also includes requests to address non-immediate operational needs.
 - Examples:
 - A system is slow but still usable.
 - Trouble when a regular work-around is available, such as
 - Outlook is not working but the web portal is available

- Unable to print but another printer or computer is available to complete the print job.
 - Request for a new network account, change to system access settings, or to schedule onboarding or training.
 - Request for procurement guidance, to evaluate a new system for implementation, or to order new hardware.
- High - a problem that (a) is preventing the requester from accomplishing their task or (b) is affecting multiple people at the same time.
 - Examples:
 - One of several Dispatch computers is out of order and the others are enough to provide required level of service.
 - Assistance is required to gather electronic evidence for an ongoing investigation.
 - Phones or Wi-Fi access are down at a fire station while data and radio communications are still operational.
 - The only computer with required software installed on it is down.
 - The system is so slow that work cannot be completed in a reasonable timeframe.
 - One of two public-facing counter computers is down.
 - A VIP-level person is having trouble with their computer.
 - An Issue is costing the city a lot of money.
- Urgent - a problem that (a) represents an immediate risk to life or health safety or (b) is adversely affecting the ability for one or more department/site to accomplish its primary mission.
 - Examples:
 - Public safety
 - A public safety vehicle computer is not working and the problem needs to be addressed before the next shift.
 - DOJ connection is down.
 - Dispatch not receiving teletype messages.
 - Fire station has lost all communication.
 - Multiple Police or Fire vehicles have lost Internet access.
 - The City's EOC has been activated.
 - Primary mission
 - Public facing technology (such as City website) is down

- Phones are down for the front counter at a community center.
- A department level system (such as Eden, TrakIT or Granicus) is down or unavailable to multiple users.
- Enterprise level problem
 - Network services are unavailable at one or more buildings.
 - A file or print server has “crashed” and is unavailable to all users.
 - An enterprise level system (such as Office 365) is having major problems for multiple users.
- Escalation and De-escalation - there may be times when a ticket’s priority may need to be adjusted as time goes by.
 - Examples:
 - The priority for a ticket will be increased if IT was unable to meet its standard response times, to make sure tickets are addressed at the earliest possible opportunity.
 - The priority for a ticket may be increased if new information is received that shows the situation should be treated as a higher priority than originally expected.
 - The priority of a ticket may be decreased once a work-around is in place, and both the assigned technician and the requester (or requester’s supervisor/manager) approve the change.
 - The priority of a ticket may be decreased, even if no workaround is available, when resolution is outside of IT’s control (such as a software change is needed by the vendor) and the requester (or requester’s supervisor/manager) is aware of the status.

To help IT do its job effectively, we ask that department staff please:

- Submit Normal and High priority tickets through ZenDesk at ithelp.cityofsanrafael.org. Note that IT should be alerted about Urgent priority issues by calling 415-485-3462, to help IT prioritize its resources for the quickest response time. Include the following information:
 - A clear/brief description in subject line
 - A clear description of the issue that allows IT to understand, to the best of your ability, what’s wrong without being next to you. Providing more details will help us provide faster service.

- Urgency level and due date, if needed.
- Supporting information (screenshot, attachments, past experience, past tickets)
- Do your best to provide minimum lead time for IT to complete required tasks.
 - Examples:
 - New employee setup - 1 business week
 - New desk or mobile phone - 1 business week
 - New computer order and installation - 2 business weeks
 - New installation of standard software - 3 business days
 - Review of specifications for proposed new system - 2 business weeks
 - Review of contract for approved new system - 2 business weeks
- Respond to follow up inquiries about details and troubleshooting
- Let us know if an open ticket is becoming more urgent or problematic
- Let us know if we can close a ticket
- Let us know how we did in servicing your ticket
- Limit duplicating tickets by responding to existing tickets

Communication Standards

- Preferred method: Staff to submit tickets directly in Zendesk, via web portal or mobile app.
 - Zendesk web portal address: ithelp.cityofsanrafael.org
 - Zendesk web portal service is available 24x7 on City network as well as remotely.
 - Zendesk ticket status:
 - New - ticket first arrives in Zendesk. Initial acknowledgement provided automatically by system for all tickets.
 - Automated response will include
 - Acknowledgement your request has been successfully received by the IT Help Desk system.
 - Your ticket number is ____.
 - You can reply by responding to this email thread or logon to the Help Desk portal at ____.
 - Your ticket will be assigned to the next available technician.

- Tickets submitted in person, by phone or emails sent directly to a technician will be added to Zendesk by the receiving technician.
- Open - ticket is accepted by help desk coordinator and routed to appropriate team or technician. Assigned technician responds to requester with questions and/or scheduling info.
- Pending (internal) - waiting for action on a pre-arranged date. Technician coordinates with requester as needed. System provides reminder when date arrives and changes status back to Open.
- On hold (external) - waiting for action by outside vendor/agency, possibly with estimated date, but not in IT's control. Technician will notify requester of On hold status and estimated date. Technician will also document any updates in ticket notes. Technician will review On hold issues weekly to decide if status change needed.
- Solved - technician believes they have resolved the issue or completed the request, gives requester 4 hours to confirm, system notifies requester the ticket is closed if no response after 4 hours.
- Closed - request is closed when no additional action by IT is required.
- Alternate contact methods:
 - Email address is available for submitting new tickets when the web portal is not available for some reason (such as Zendesk is down or user away from a computer with access):
 - ithelp@cityofsanrafael.org
 - Email messages will be automatically routed to Zendesk, as Normal priority, with the system automatically creating a new ticket for each message and sending the requester a notification of receipt.
 - An IT representative will contact requester upon first opportunity for any additional details needed to begin or schedule the work.
 - Telephone service is available to contact the IT help desk for **High and Urgent priority issues**. IT will attempt to always answer the phone during regular business hours (M-F, 8:30 am to 5:00 pm), and will have a technician on standby after hours.
 - Phone number: (415) 485-3462
 - After 5 rings, or after hours, callers will be told they can press "1" to reach the on-call technician for High and Urgent issues (and provided a brief description of High and Urgent priorities as well as a reminder that authorization for overtime may be required). If not a High or Urgent issue, callers will be asked to hold for the next available

technician or invited to use the Zendesk web portal or email methods instead.

- Standard Response Times - the following timelines will be used as the limits for IT to communicate with requesters on open tickets; in all cases, technicians will strive to beat these times.
 - Initial acknowledgement of receipt - provided automatically by system, including unique ticket number, for all tickets submitted through Zendesk web portal or mobile app, or via email sent to ithelp@cityofsanrafael.org.
 - IT response time - how soon IT assigns a technician and a working priority. Technician responds to requester with more info/questions, timing to begin work, and/or resolution, based on the following priorities:
 - Urgent - 1 hour response time (when valid request communicated via telephone service)
 - High - 4 business hours response time
 - Normal - 2 business days response time
 - IT resolution time - how soon IT will resolve the submitted request. Time depends on nature of the problem, and available resources. IT will, however, attempt to have a work-around in place within the following number of hours if no resolution is in place beforehand:
 - Urgent - 4 hours after IT response
 - High - 8 business hours after IT response
 - Normal - 3 business days after IT response
 - Status updates - how often IT will provide an update on the status of troubleshooting efforts and timing toward resolution. Assigned technician will provide, as a minimum, updates by entering ticket notes as well as sending email info to the requester based on the current priority.
 - Urgent - regular ongoing communication
 - High - updates at least once per day
 - Normal - updates at least once per week
- Scheduling Visits from IT - technicians will strive to be respectful of the requester's time when working on open tickets. There are many times when a visit (or even a phone call) may not be appropriate when unexpected.
 - If the technician is available to start troubleshooting right away, as the ticket is being created in person or on the phone, then the technician will ask if it is a good time for providing immediate support. If the requester is also free, then the technician will attempt to connect remotely or advise the requester that they are on their way to the requester's site.

- If the technician determines they need to visit the requester's location to troubleshoot after the ticket has already been open and waiting for dispatch, they will provide the requester two or three times in their schedule when they can be onsite.
- The staff member will then have the opportunity to confirm the best time for the technician's visit.
- If the staff members knows in advance that a technician will need to visit their location, they may provide two or three times when they're available for an appointment or advise on how best to initiate schedule coordination.
- Feedback Surveys - the following methods will be available for department staff to provide feedback to IT on their performance and customer service:
 - Ticket completion - Zendesk will automatically send a request for feedback upon completion of each ticket. This will give affected staff the opportunity to let IT know how they performed on specific service requests. This survey will include a quick reminder of the subject, timeline, and technician for the ticket and will ask for rating on overall performance and timeliness.
 - General Customer Service - IT will periodically ask all staff to provide anonymous feedback on various customer service topics. Understanding how our customers use help desk services, what is going well, and what could use improvement will help IT continue to make improvements.

Emergency Support

- IT provides emergency support for Urgent priority issues that are adversely affecting public safety and/or the ability for a department/location to accomplish its primary mission.
- Staff reporting an Urgent priority issue are encouraged to submit details via Zendesk, but are advised to alert IT as soon as possible by calling 415-485-3462. Press "1" to be transferred to the on-call technician's cell phone after hours.
- Urgent issues should be authorized for reporting to IT by a supervisor or manager, in case overtime costs are needed for IT to respond and/or work on the issue.
- IT will respond to an Urgent issue immediately, while on the phone, or within 1 hour if a voicemail is left on the on-call technician's cell phone (in the event the technician is unable to answer their cell phone right away).
- IT's on-call technician will have access to other IT employees and/or contractors in case additional resources are needed to address the issue.

- Escalation procedure - requesters may ask that their open tickets be escalated to a higher priority if they feel it is not being addressed in a timely manner or if mission impact has increased. Please contact the IT Manager or Senior Network Administrator for assistance directly, or through the on-call technician.
- De-escalation procedure - Once a work-around is in place, and both the assigned technician and the requester (or requester's supervisor/manager) agree the situation is no longer an emergency, the ticket priority may be downgraded to a lower level. The priority of a ticket may also be decreased, even if no workaround is available, when resolution is outside of IT's control (such as a software change is needed by the vendor)

Availability

- IT's regular office hours are Monday to Friday, 8:30 am to 5:00 pm.
- Night time and weekend support for Urgent priority issues is available on the phone from an on-call technician. Once authorized by a supervisor in the department, call 415-485-3462 and press "1" to be transferred to the technician's cell phone.

Support Documentation

IT will regularly add documentation to the Zendesk knowledge base to provide for customer self help as well as to help standardize IT's internal operations.

- General support documentation
 - Service Level Agreement
 - Procurement Guidelines
 - New Employee Orientation Checklist
 - Webpage with links to most popular topics
- Self Help documentation (some categories IT will work on first)
 - Software basics
 - Email (Office 365)
 - Outlook desktop, web, and mobile
 - OneDrive access and collaboration
 - Scheduling meetings
 - Windows basics
 - Network resources (shares and services)
 - Changing your password
 - Remote access (VPN and RDP)

- City Website, intranet, and Sharepoint
- HRweb timesheets
- Hardware basics
 - Desk phones and voicemail
 - Mobile phones and tablets
 - Printers and scanners
 - Loaner laptops and projectors
 - Meeting room audio/video
- Security standards
 - Email risks (spam, phishing, and spoofing)
 - Web risks (links and masquerades)
 - Credit cards and other personal info
 - Detecting and reporting viruses
- Internal documentation (more to follow in this area too)
 - New computer setup checklist
 - New account setup procedures
 - How to configure a meeting room
 - How to configure a leave calendar

To help IT concentrate on the more difficult technical issues, we ask staff to please:

- Consider the knowledgebase for self help documentation if you think you can solve the issue on your own.
- Suggest additional topics for self help documentation.
- If you've had success solving an issue, let us know and contribute documentation.

New Employee Training

- Hiring managers should submit a ticket for new employee setup and training at least a week before their first scheduled day of work, providing
 - Time to schedule an initial discussion between IT and hiring manager to go over
 - Is equipment already available for the new person, or will new computer, phone, or mobile device need to be ordered in time?
 - Does this role need the same software and access as a current staff member that we can duplicate? Is it similar but with certain exceptions?
 - Are furniture and other physical items ready, or will changes be made that IT will need to work around?

- Are there any special considerations to the new hire?
 - Schedule date and time (approximately 1 hour) for new employee orientation training.
- Prior to the orientation training session, IT will
 - Setup workstation
 - Computer and telephone equipment
 - Email
 - Standard software and systems
 - Access and permissions
 - Schedule IT Orientation for first day of work. Anyone using a City computer must receive an IT Orientation, independent of any departmental orientation or training.
- IT Orientation will include
 - How to login
 - Access Email - portal (everywhere), Outlook (on specific computer)
 - Access files - portal (everywhere), network drives (within the city network)
 - Print
 - HR info and timesheets
 - Employee Directory (search via ShoreTel phone, Outlook, web site)
 - Cross department file access
 - Calendars
 - Phones & voicemail
 - Cell phones and usage policy
 - Computer and usage policy
 - Basics on computer security (e.g. available training)
 - How to ask for help
- Contingency Plan for Rush Setup
 - In the event that a rush setup is needed by the department, this is what IT can provide on an expedited schedule. For all other items, we will do our best to deliver as soon as possible after initial setup. Equipment delivery will still be based on availability in the IT inventory.
 - Setup equipment (computer, mouse and keyboard) with default software
 - ShoreTel desk phone and voicemail
 - Email and network account creation
 - Access and permissions for specific software systems and/or network services may take more time.

- Membership in distributions lists in addition to the default department list will come later.
- Remote access to network resources will be done later.

Procurement

IT will provide consultation services and work on written guidelines to help departments navigate the technology procurement process.

- Procurement Guidelines - help with interpreting the City's procurement ordinance and purchasing policy for different types of technology items.
 - Department level systems and specialized software
 - Cloud-based software systems
 - Individually licensed desktop software
 - Multi-function printer-copiers with maintenance plan
 - Specialized hardware and/or embedded systems
 - etc.
- Standard Purchase Items - a list of pre-approved hardware and software that departments can purchase on their own (just let IT know when you'll need our help to install).
 - Printer ink and toner
 - Printer and plotter paper
 - Keyboards and mice
 - Desktops, laptops, and tablets
 - Smartphones and accessories
 - Batteries and other consumables
 - Portable storage (DVDs and USB flash drives)
 - And other technology related products.
- Purchasing Portal - links to IT's pre-registered vendors for providing hardware, software, and services.
 - Verizon
 - Dell
 - CDW
 - Office Depot
 - And other technology related vendors.
- PC Replacement Listing - list of PCs in every department with the original purchase date and estimated date for replacement.

To help IT be effective in getting everyone the technology they need, we ask staff to please:

- Include IT in your planning as early in the process as possible.
- Use IT for consulting services to evaluate potential technology solutions, to meet business needs, even when a potential solution is not yet apparent
- Think of IT as a resource in evaluating your options for meeting department needs.
- Schedule a meeting to discuss a new system you're considering purchasing
- We know technology. We are here to help.

Note that systems will become outdated over time, and IT may not be able to continue providing support as this happens.

- Standard computers and network printers are currently purchased by the City with an expected 5-year lifecycle. Departments will normally pay for a new item in order to add it to the inventory. The new item will then enter the City's replacement program in the following fiscal year.
- Departments will provide contribution in their budget for items assigned to them, to cover maintenance and support services as well as to build a replacement reserve. The amount of contribution is re-calculated as part of the budgeting process each year. Once the item has been in the program for 5 years, the reserve account will have enough funds available to pay for its full replacement.
- Once a computer is replaced through the City's replacement program, it may be used by IT to meet lower priority needs. The equipment may remain in the original department, marked to show that it has already been through the replacement process, or used in another department. No additional funds will be used to keep the item operational at the time of replacement or in the future. If the item is not usable for any lower priority need, IT will dispose of the item through normal e-waste processes (including secure disposal if necessary).

Reporting

- If we all use Zendesk as outlined in the tickets and communication standards sections, IT will have data for reporting and continuing to improve service.
- Our goal is to:
 - Decrease number of total tickets
 - Improve response time
 - Increase satisfaction
- Some of the areas IT will be tracking are:
 - Number of tickets submitted each week, month, year.

- Number of tickets submitted by location, department, requester.
- Number of tickets submitted by priority level.
- Average time between ticket submission and initial response by a technician.
- Average time between initial response and problem resolution.
- Satisfaction rates for ticket completion.

Security Standards

These are some standards, based on security requirements, that IT will adhere to while working on tickets and that we ask staff to follow as well:

- IT will not ask for your password; please do not give it to our technicians.
- IT will not send passwords via unencrypted email, or ask you to do so.
- All staff should challenge anyone moving a computer that they don't recognize as an IT or department staff member.
- All staff should verify anyone calling on the phone or contacting them by email is actually from IT, before allowing them access to their system.