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# FRESHSERVICE USAGE AND GUIDELINES

VERSION 1.7

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NIPISSING FIRST NATION

## 1. POLICY STATEMENT

Nipissing First Nation's IT Department (NFNIT) will support all staff through the Freshservice Ticketing system. This will include support requests, service requests and inventory management of IT related assets. The NFNIT Department cannot service any staff without a support request submitted by a staff member.

## 2. PURPOSE OF THE POLICY

The purpose of this policy is to increase department efficiency and to better support NFN Staff members. All staff are required to use Freshservice for reporting IT related matters to the NFNIT department. The following policy has been created to help establish guidelines for both the NFNIT Department and all other NFN staff for proper handling of IT support related matters. This policy is intended to outline how tickets and service requests should be processed internally by IT staff while maintaining transparency to the rest of NFN employees.

## 3. SCOPE

This policy applies to all NFN staff members. To avoid any potential delays or confusion surrounding support tickets, staff should follow the guidelines outlined within this policy. Any deviation from these guidelines should only be made at the instruction of the IT Manager.

## 4. DEFINITIONS

- i. **"Requester"** refers to any individual staff member who has submitted a support or service request.
- ii. **"Agent"** refers to any individual responding to a support or service request.
- iii. **"Teams"** or Microsoft Teams is in reference to Microsoft Teams Software, included in the Office 365 suite.
- iv. **"Ticket"** refers to any open support inquiry added to the Freshservice system.

## 5. TICKET SUBMISSION

When submitting a new ticket to the NFNIT Department, please observe the following to ensure your ticket is processed correctly and efficiently.

- Support Tickets should always be submitted through Freshservice. Avoid communicating directly with support staff via Phone, Email or Teams when possible, unless requested to by an IT Agent through your Freshservice ticket or when the nature of the support request prevents you from submitting a ticket.
- All staff should submit their own tickets to avoid communication issues or delays in support. This also helps get staff in the habit of using Freshservice on their own instead of relying on others to submit tickets for them. Exceptions to this rule can be made given the nature of the support ticket such as:

- Unable to login to their computer to make a support request
  - Unable to access Freshservice due to issues with credentials.
  - Submitting a Tech Equipment Request when the user does not have authority or permission to make such a request.
  - Submitting Service requests for staff yet to be onboarded.
- If your support ticket requires an Agent to be physically present in order to service your issue, please indicate in your tickets description if you have any scheduling conflicts or a preferred time you wish an Agent to come by. While preferred times are not guaranteed, it will help with scheduling and avoid potential delays in receiving technical support.
  - Be as detailed as possible when submitting your issue. If the ticket is time sensitive, indicate this within your description. If you have limitations with availability that would prevent an Agent from completing the support request, also indicate this in your description.
  - If you have an outstanding ticket that you no longer require support on, please close out your ticket so NFNIT can be made aware it. Requesters can reply to their ticket asking the Agent to close it on their behalf if communication was already established. A Requester may also login to their Freshservice account, open their ticket and click the "Close" button in the top right corner. Closing tickets that no longer require support will help IT Staff streamline their active tickets, allowing them to provide better service to Requesters.

## 6. TICKET ASSIGNMENT

When tickets are submitted to Freshservice, they are not assigned to any Agent by default. It is the responsibility of each Agent to assign tickets to themselves as they are received. To ensure tickets are being addressed in a timely fashion, support requests should be assigned to an Agent within **3 hours** of receiving a new ticket. If a ticket is not assigned within this time, the IT manager should assign the ticket to an Agent at their discretion.

## 7. TICKET PRIORITY

### Automated Escalation

All tickets submitted through Freshservice will receive an initial default priority. After priority has been given, tickets will automatically be escalated based on criteria set forth within the Freshservice system. This criteria is based on default response times and default resolution times, respectively. Tickets may also be manually escalated at the discretion of the IT manager or when tickets meet certain requirements for manual escalation. While thresholds are given to help automate ticket priority, all IT Agents should attempt to resolve tickets in a timely fashion, regardless of the amount of time left before automatic escalation would occur.

### Low Priority

This is the **default** priority given to all support tickets. All tickets with Low priority must be responded to within **1 business day** of ticket submission by an IT Agent. These tickets should be resolved within **7 business days**. If either the response or resolution threshold is passed, the ticket will be escalated.

### Medium Priority

Medium priority is received when a ticket has been escalated from low priority. All tickets with medium priority should be responded to within **4 hours** of ticket submission or escalation. These tickets should be resolved within **5 business days**. If either the response or resolution threshold is passed, the ticket will be escalated.

### High Priority

High priority is received when a ticket has been escalated from medium priority. All tickets with high priority should be responded to within **1 hour** of ticket submission or escalation. These tickets should be resolved within **6 hours**. If either the response or resolution threshold is passed, the ticket will be escalated.

### Urgent Priority

Urgent priority is received when a ticket has been escalated from high priority. All tickets with urgent priority should be responded to within **15 minutes** of ticket submission or escalation. These tickets should be resolved within **4 hours**.

## **Manual Escalation**

Under different circumstances, tickets may be manually escalated before each priority escalation threshold is reached. Manual escalation should be performed on tickets that meet certain criteria or at the discretion of the IT Manager. All new tickets received through Freshservice will be reviewed by the NFNIT Department to determine if manual escalation is needed.

### Medium Escalation

Most new tickets in Freshservice will be manually escalated to medium priority, unless the Requester has indicated the issue is of low priority, or if the issue cannot be resolved in a timely matter due to availability constraints of the Requester.

### High Escalation



Issues that directly impact the Requester's ability to work or communicate will be escalated to high priority. This primarily includes issues related to account access, email access or inability to access NFN data which may be time sensitive to the Requester. If a Requester requires resources that are time sensitive, the Requester should indicate this in their description to ensure proper escalation can occur.

#### Urgent Escalation

All manual urgent escalation will only be made at the discretion of the IT manager when the support issue in question should take precedence over all other high priority tickets.

#### **De-escalation**

Tickets may also be de-escalated to low priority by Agents if the ticket has a priority of **medium** and the following guidelines have been met.

- Agent is awaiting feedback from Requester but has not received a response for **3 business days**.
- Ticket is still pending, but the Agent cannot proceed. Common examples of this could be due to Requester availability, lack of proper feedback or confirmation required from the Requester, or if the Agent is waiting on parts/hardware delivery to complete a repair or support request.
- The ticket cannot be resolved without additional support from a third-party vendor. This type of ticket should only be de-escalated if the vendor has been contacted and is scheduled to follow up/resolve the issue for the Requester on behalf of the NFNIT Department.

Tickets that **do not** have a priority of **medium** and **do not** meet any of the guidelines indicated above should not be de-escalated unless directed to or performed by the IT Manager.

## **8. TICKET STATUSES**

Tickets created within Freshservice will always have a status assigned to them. The following indicates the type of status a ticket can receive and the purpose behind them.

#### Open Status

All tickets receive a default status of open. Open tickets indicate the ticket has yet to be started. It has nothing to do with whether a ticket has been assigned to an Agent.

#### Pending Status

Tickets will receive the status of pending once an Agent starts to work on them. This primarily includes the conditions outlined within **Ticket De-escalation**. In most cases, pending status will be applied with

de-escalation, however a ticket can receive pending status before de-escalation occurs. For instance, this might happen when a ticket is awaiting Requester feedback but has not passed the 3-business day threshold required for de-escalation to occur.

Tickets that have a status of pending, do not need to be re-escalated unless directed to or performed by the IT Manager.

### Resolved Status

Resolved status is given to tickets by Agents when the issue reported has been resolved. The Agent should indicate to the Requester the issue has been resolved before updating the status of the ticket. Additional information will be provided by the Agent regarding how the issue was resolved. This can be a public note or private note based on the discretion of Agent.

All resolutions should be properly documented by an Agent, which may include public or private notes. This is to ensure proper documentation is kept within the Freshservice database and can be referenced later if the issue is re-opened by a Requester or if an Agent needs to review what was previously performed for troubleshooting purposes.

If the issue has not been resolved or was incorrectly reported as resolved by the Agent, the Requester may re-open a resolved ticket for further support. The Requester should indicate why they are re-opening the ticket so the Agent can be properly informed of the ticket status.

Resolved tickets that are not re-opened within **72 hours** are automatically marked as closed.

### Closed Status

Closed status is given to resolved tickets when the threshold has been met, or when the issue reported cannot be resolved by an Agent but there is nothing left for the Agent to do. The following are examples of what might mark a ticket as closed.

- The Agent has made multiple attempts to receive feedback from the Requester. The ticket has a priority of low and is more than 7 days old.
- The ticket was created by mistake and no resolution is needed.
- The ticket does not apply to the NFNIT Department.
- The ticket was valid when created but is no longer valid by time an Agent has a chance to review. This also applies to issues that cannot be reproduced.
- The ticket was created, but the Requester was able to resolve the issue and no longer needs support. Depending on the context, this ticket may also be marked as resolved.

- The ticket has a status of resolved and the Requester has not re-opened the ticket after 72 hours.

Agents should indicate to the Requester the reason for closing the ticket before updating the ticket status. A ticket can also be closed at the discretion of the IT Manager. Closed tickets should not be re-opened. If the Requester believes a ticket was closed by mistake or needs further support, they should open a new support ticket instead.

## 9. SERVICE REQUESTS

In addition to Support tickets, Requesters have the option to request services. These services are broken down into several categories and can be used in place of creating a general support ticket. Requesters can:

- Request the ordering of new hardware.
- Hardware configuration such as printers, monitors and workstations.
- Software Installation
- Onboarding/Offboarding/Transitioning of an employee
- Backup/Restore Data
- Email Creation such as Shared Mailboxes or Distribution Lists
- Password Reset (When standard reset methods do not work)

Service requests can also be submitted on behalf of another Requester when the requesting Requester does not have authority to make a service request, or when the requesting Requester is unable to login/access Freshservice or their email. For all other circumstances, Requesters should submit their own service requests to avoid communication issues and to ensure accurate data is stored within the Freshservice database.

## 10. RECEIVING SUPPORT

In order to receive support, a Requester must submit a ticket to Freshservice, either by using the web url <https://nfn.freshservice.com> or by using the Freshservice app.

The Freshservice app can be found in Apple's **App Store** or Google's **Play Store** by searching for "Freshservice".

## 11.MICROSOFT TEAMS

After a Requester submits their ticket, an Agent will be assigned to help them. In order to receive proper support, Requesters are required to have their Teams application open. While Teams is not required in all support instances, it is still a vital part of the support process. Teams can allow an Agent to call/chat with the Requester directly, see whether a Requester is busy or be used to share or during the troubleshooting process.

## 12.SOLUTIONS

To empower NFN staff, the NFNIT Department will periodically release support documentation to help Requesters with common concerns and issues that they can resolve on their own. These documents will be uploaded to solutions inside of Freshservice. If a Requester has an issue that can be answered in solutions, IT Agents are encouraged to direct Requesters to those solutions. However, if a Requester is unable to resolve their issue, even after reviewing the support documentation, then an Agent should take the time to resolve the Requester's issue.

## 13.INVENTORY MANAGEMENT

This section provides guidelines for agents on managing inventory with Freshservice, ensuring an efficient and systematic approach to tracking and maintaining IT assets.

### Asset Registration

Every IT asset, whether purchased through the IT department or otherwise, must be registered in the Freshservice system upon acquisition. As much detail should be included during the registration as possible, this can include but is not limited to Asset Type, serial number, purchase date, warranty information, asset assignment, product description and PO number.

Naming conventions of Asset Registration should follow guidelines set forth by the Freshservice Naming Conventions SOP (Appendix A).

### Regular Audits

Conduct periodic audits of physical inventory against the records in Freshservice to maintain accuracy. Any discrepancies should be addressed promptly.

### Asset Assignment and Tracking

Assets should always be assigned to staff. If assets are assigned to new staff, it is the responsibility of the manager to report these changes to IT so they can update the inventory accordingly.

### Retirement

When an asset is no longer in use, its status should be updated accordingly in Freshservice.



## 14.FEEDBACK

### Requester Feedback

If Requesters have suggested feedback, comments or concerns for the IT staff, they may submit those through a standard ticket and by selecting the "Feedback" category.

### Agent Feedback

To ensure ticket guidelines are being met, the IT Manager will regularly review Freshservice reporting data. In the event tickets are not being completed within the thresholds outlined in the Ticket Submission section of this document, a review will be conducted to determine whether the thresholds are set too low, or if there are other factors that may be diminishing performance and response time to support requests.

*Approved this 19<sup>th</sup> Day of December 2023*

# IT Asset Naming Convention (Freshservice)

## Purpose

This SOP provides a standardized naming convention for IT assets within the organization to ensure consistency, ease of tracking, and effective asset management.

## Scope

This applies to all IT-related assets acquired by the organization, across all departments and locations.

## Definitions

- **Department Code:** A specific code assigned to each department for identification.
- **Asset Type Code:** A code that categorizes the type of IT asset.
- **Date Code:** A four-digit code indicating the month and year of purchase.
- **Iteration Code:** A numerical sequence to differentiate similar assets acquired at the same time.

## Department Codes

The department code consists of an abbreviation that correlates with the department's name and function. Each department has been assigned a unique code as follows:

Code	Department Name
ADM	Administration
CUL	Culture
ECD	Economic Development
EDU	Education
EMG	Emergency Services
TRU	True Self
EMP	Employment & Training Services
FAC	Facilities
HSG	Housing
LCH	LCHC
LND	Lands & Natural Resources

<b>SOC</b>	Social Services
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## Asset Type Codes

Asset type codes classify the equipment by its primary function or type. The current codes are as follows:

Code	Asset Type Name
<b>AVE</b>	Audio & Video Equipment
<b>PHN</b>	Phone
<b>CEL</b>	Cell Phone
<b>DSK</b>	Desktop
<b>SVR</b>	Server
<b>LAP</b>	Laptop, Chromebook, Windows Tablet
<b>MON</b>	Monitor
<b>PRT</b>	Printer
<b>SCN</b>	Scanner
<b>TAB</b>	Android/iPad Tablet
<b>MMD</b>	Multimedia Devices
<b>NET</b>	Network Equipment
<b>MFC</b>	Multi Function Copier
<b>OFF</b>	Office Peripherals

## Date Code

The date code is a four-digit number representing the month and year of the asset's acquisition. The format is MMY, with MM standing for the two-digit month and Y for the last two digits of the year. No spaces or other symbols should be used to separate the month from the year.

## Iteration Code

The iteration code is a two-digit number starting from 01, 02, etc., used to identify multiple assets of the same type and model acquired at the same time.

## Examples

Below are examples illustrating how to combine the codes into a comprehensive asset name (tag):

### 1. EDULAP0323

- Department: Education (EDU)
- Asset Type: Laptop (LAP)
- Make/Model: Apple MacBook Pro
- Purchase Date: March 2023 (0323)
- Iteration: First of its kind (01)

### 2. ECDSVR0722 02

- Department: Economic Development (ECD)
- Asset Type: Server (SVR)
- Make/Model: Dell PowerEdge
- Purchase Date: July 2022 (0722)
- Iteration: Second of its kind (02)

### 3. ADMPRT0123 03

- Department: Administration (ADM)
- Asset Type: Printer (PRT)
- Make/Model: HP LaserJet Pro
- Purchase Date: January 2023 (0123)
- Iteration: Third of its kind (03)

### 4. FACNET1122

- Department: Facilities
- Asset Type: Network Equipment (NET)
- Make/Model: Cisco Catalyst
- Purchase Date: November 2022 (1122)
- Iteration: First of its kind (01)



## Handling Name Changes

The following section provides guidelines for updating asset codes in the event a reclassification is determined to be necessary.

### **Department Reassignment:**

- When an asset is moved to a different department, its code must be updated in the name to reflect this change.
- Record the change in the asset description to maintain a log of the change.
- If feasible, update the physical label on the asset to show the new change.

### **Asset Type Reclassification:**

- If a new asset type is defined that more accurately describes an asset, the asset type code should be updated in the name to reflect this change.
- Record the change in the asset description to maintain a log of the change.
- If feasible, update the physical label on the asset to show the new change.

When drafting the description to document changes, ensure that a reason is included, along with the original asset name.