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HELP DESK STRUCTURE

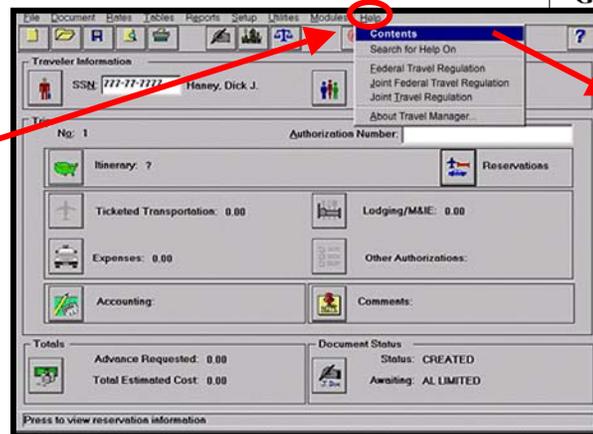
Objective

The Defense Travel System (DTS) is based on an interactive system comprising a Common User Interface (CUI), a commercial travel office, and other DoD operations. This comprehensive DTS requires a multi-tiered support approach to assist travelers, Authorizing Officials (AOs), Defense Travel Administrators (DTAs), and other users. The help desk objective of this particular architecture is to ensure customer satisfaction by resolving problems at the lowest appropriate tier.

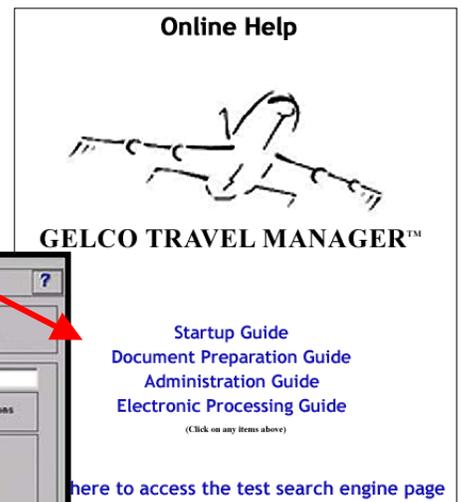
Concept—Tiers of Support

Tier 1 is the user level—the traveler, the DTA, and the Authorizing Officials (AO)—and is the first layer of support which includes:

1. Training Materials
2. Computer Based Training (CBT)
3. Help Screens in DTS software
4. Frequently Asked Questions (FAQ)
5. Gov't Charge Card Vendor (billing)
6. Organizational DTA (ODTA)



Online
Help
Screens



For questions or problems, the traveler or AO should first research all self-help sources (#1-5 above) for solutions or answers. If the difficulty persists, consult with the ODTA for assistance before contacting any Tier 2 level resources.

Tier 2 is the next level and is supported by the servicing Commercial Travel Office (CTO) and the DTA Help Desk. Once travel begins, travelers should contact the CTO for problems or changes regarding travel arrangements. Additional information on the DTS Help Desk is located in the section, Help Desk—Tier 2.

Tier 3 includes TRW and Defense Information Systems Agency and is the topmost support directly assisting the DTA with those problems not resolved in Tier 1 or 2. All possible Tier 2 options must be investigated before the Help Desk contacts the Tier 3 Help Desk. (DTAs will receive identification numbers for access to Tier 3.) ***Only in an after-hours emergency should the traveler seek assistance directly from the Tier 3 Help Desk.***



HELP DESK MANAGEMENT

NOTE: SET UP THE HELP DESK WITH FULLY-TRAINED PERSONNEL AND FUNCTIONING EQUIPMENT 14 DAYS PRIOR TO DTS IMPLEMENTATION.

A well-organized, -equipped structure and well-trained staff lay the foundation for an effective help desk that will facilitate a successful transition to DTS. Therefore, each command and DTA must thoroughly evaluate how best to set up, equip, staff, and support their DTA Help Desk. Below are some suggested guidelines for your help desk.

Set Up

Establish a dedicated help desk that is centrally located, preferably in the Financial Services Office (FSO) or DTA (if separate from the FSO). The DTS Help Desk should operate and be accessible during normal working hours (0700-1700). Basic methods of access should include:

-
- | | |
|--------------------------|--|
| Telephone | You will need at least two dedicated telephone lines, equipped with a rotating comm switch. Call waiting is <i>not</i> recommended as it may distract the help desk staff or encourage interruptions with the original caller. |
| Voicemail | When all lines are busy, or during non-duty hours, calls should automatically be switched to voicemail. Two voicemail greetings are necessary—one for duty hours and another for after hours. The Duty hours greeting should include a request for the caller's name, number, and a brief description of the problem and also a statement similar to, "we will return your call as soon as possible." For the after hours greeting, state hours of operation and the instructions for emergency procedures. Include the appropriate phone numbers for Tier 3 support, PKI assistance, CTO support, and Transportation. Emphasize that <i>emergency relates to travel arrangements/changes only</i> . |
| Email | This will be a principal method of interaction between users and the help desk. The help desk email address should be included in the training materials and published on the local DTS web site. |
| Fax | A dedicated fax line, or access to a shared and nearby fax machine, should be available. This access would be useful for the user to send a picture (print screen capture) of error messages or the point of difficulty in the software. |
| Beeper/Cell Phone | A beeper/cell phone should be provided to on-call help desk personnel and the number should be included in the help desk voicemail greeting. It is suggested that a beeper or cell phone be used for the first thirty days or so, after implementation. Following this initial period, beeper/cell phone capability should not be necessary |
-

At Annex A is a summary of information that DTS users should have before they call the Help Desk. This summary should be widely distributed to users through:

- DTS training
- Local DTS web site
- E-mail

Equipment

Dedicated Telephone Line	See above
Cordless Headsets	As full-time positions, help desk personnel will be spending many hours on the telephone. Lightweight phone headsets will free both hands for typing or writing and will prevent muscle aches caused by “cradling” the handset with neck and shoulder.
PC Specifications	Networked PCs compatible with DTS software and top-of-the-line PCs and printers at or better than most DTS users on base.

Staffing

Selection

For optimal support, staff the help desk with full-time positions, not as collateral duty. Initially, three people would be best—particularly during the start-up phase when travelers and users will be unfamiliar with the Defense Travel System and for the surge during core working hours. After a year or so, when users become more experienced with the travel process, cut staffing to two full-time positions.

Suggestion: establish a support team of key personnel—PKI shop chief, Communication Squadron, Transportation, and Public Affairs—to serve as an additional resource, especially until the Help Desk staff is fully cross-trained.

Suggestion: the Lead DTA should designate a Help Desk Manager to be responsible for the overall operation of the help desk. The manager should be an NCO or civilian equivalent who meets the prerequisites listed below.

The DTA Help Desk organization should incorporate personnel (and any other designated points-of-contact) from local training, information technology, finance, and/or transportation offices. Good candidates for the DTA Help Desk are personnel currently performing similar help desk responsibilities in those organizations.

Suggested Selection Prerequisites:

-
- Technical Skills—computer literate (word processing, spread sheets, email and internet) and able to learn new products quickly
 - Strong problem-solving skills—able to identify and resolve problems effectively
 - Travel regulations knowledge and/or experience
 - Communication skills—good listener and able to convey ideas effectively
 - Customer Service skills—interact politely and remain professional and keep caller focused
 - Retainability/turnover—minimum 18 months left at site

Training

The PMO training team provides *overview* training on DTS but it is strongly suggested that all Help Desk personnel attend the train-the-trainer training given by PMO/TRW.

The DTA should also consider supplemental training on aspects such as phone etiquette and customer service—in particular, dealing with a difficult customer.

Customer Service is the primary concern of the Help Desk. The staff should respond in a *timely* manner to voicemails, emails, and faxes (24 hours) even if only to acknowledge receipt or give a status report of a still-unresolved issue. The goal is to resolve at least 50% of problems with the initial call. After gaining help desk experience, the goal should increase to 80%.

When answering a call . . .

- Try to answer the telephone by the third ring
- Speak clearly and remain calm and courteous
- Identify yourself and the organization ("Help Desk, Lt. John Jones speaking.")
- Keep note-taking materials near your telephone—be complete and accurate
- Have the caller describe the problem, any error messages, and what he or she was trying to do. Walk the caller through the process again, if necessary, to recreate the problem.
- Check voicemail and email at least twice a day

If customers become frustrated, agitated, difficult, or even rude, the Help Desk staff should maintain a polite, calm attitude conveying a willingness to help, and focus on the customer's dilemma. Keep pulling the conversation back to the problem or question. If the situation becomes out of control, it may be necessary to refer the call to the Help Desk manager or supervisor.

Customer feedback forms are an excellent method of tracking customer satisfaction with the help desk operation. Feedback can be accomplished by email, fax, or by posting the feedback form on the base DTS web site. See Annex B for suggested feedback questions.

Support

Getting the word out

Broadcasting announcements, schedules, procedure changes, and software updates etc is essential to establishing *and* maintaining an efficient operation. Since training may be the first introduction to the help desk, all local training should include information such as numbers, hours of operation, Tier support, and email addresses. Some other effective means of communication are:

- Base newspaper
- Site DTS web site (link to help desk)
- Email
- Flyers

Also see Marketing Plan document.



HELP DESK—TIER 2

Welcome to Tier 2—supported by the servicing CTO and the DTA Help Desk. This is the next level available to support the traveler or AO for solving problems or answering questions. The traveler or AO *must* have explored all means of solving the problem at the Tier 1 level prior to contacting the DTA Help Desk for assistance.

The DTA Help Desk supports the end-user with problems or questions concerning:

- Travel arrangements (prior to travel commencement)
- Travel policy issues
- DTS Software and CUI use
- Transactions
- Payment
- Contract performance

NOTE: TIER 2 ASSISTS WITH DTS ISSUES AND DOES NOT ADDRESS GENERAL PC USE AND FUNCTION PROBLEMS. USERS WITH PC PROBLEMS SHOULD BE DIRECTED TO CONTACT THEIR ORGANIZATION SYSTEMS ADMINISTRATOR.

Documentation

- You will need to document data on problems and their resolutions. The advantages to recording these lessons learned are:
 - sharing information, especially resolutions, with other help desk personnel to broaden knowledge database more quickly
 - tracking to determine the most common problems
 - making trainers aware of these common mistakes so that future training can stress preventative actions
 - building a reference of workarounds for handling unusual or especially difficult problems and questions
- Documenting data can be done with varying levels of technology from basic paper and pen to spreadsheet applications to high-end commercial tracking and communication software. It is important to define the parameters to be tracked so that all personnel are recording proper and complete information. PMO has developed a Microsoft Access-based method of tracking and documenting help desk operations—coordinate directly with PMO for further information.

Procedures:

The following procedures regarding Tier 2 have been extracted from *Help Desk Guide to Operations: Defense Travel System Help Desk Concept of Operations*. Version 2.0. 6/15/00

At the tier 2 level examples of some functions include:

- Acknowledge help requests from tier 1
- Be knowledgeable on the system and very qualified to handle problems appropriate to the DTA level
- Review data provided by tier 1 and other DTA Help Desks
- Engage other tier 2 resources or associates in problem solving activities
- Resolve tier 2 problems accurately
- Inform the problem owner of action status and when the problem is resolved
- Escalate problems to tier 3 only when all tier 2 means are exhausted

For example, in the case of a non-receipt of a EFT payment, the DTA would first work with the traveler to verify that the bank account information in the traveler's profile was correct prior to reporting the non-EFT receipt as a problem that required DISA and DFAS action. As another example, slow CUI response time could be a TRW problem, a NIPRNET problem, or a base LAN problem. In this case, the DTA is expected to check with the local base Information Technology or Information Systems staff and verify that the problem does not lie at the base level before reporting it to the DISA Help Desk.

The TRW Help Desk will resolve problems or questions relating to CUI issues or performance that are forwarded upward by the DTA or travel services contractor. DISA centralized help desks will be the single point of entry for problems or questions outside of the CUI. For example, some of these problems may involve the PKI, NIPRNET, ECPN, VPN's, DFAS, and non-receipt of EFT into the traveler's bank account or travel charge card account, etc. Resolution of problems forwarded to the tier 3 level may involve multiple technical areas and require cross-functional research between TRW, DISA, and other government and commercial organizations.

As mentioned above, the DTA will be expected to research and verify that the problem or issue is outside of their direct control prior to forwarding problems to the tier 3 level. Once a problem is accepted at the third tier, it is extremely important that the DTA and their customers be kept abreast on the status of the problem and resolution. At the tier 3 level, some functions include:

- Acknowledge assignments from tier 2 service providers
- Review data provided by the problem owner (from both tier 1 and 2)
- Oversee and coordinate resolution activities
- Document current status in the call tracking/problem management system
- Periodically communicate problem status to the tier 2 DTA Help Desk
- Document the resolution
- Inform the tier 2 DTA Help Desk when the problem is resolved

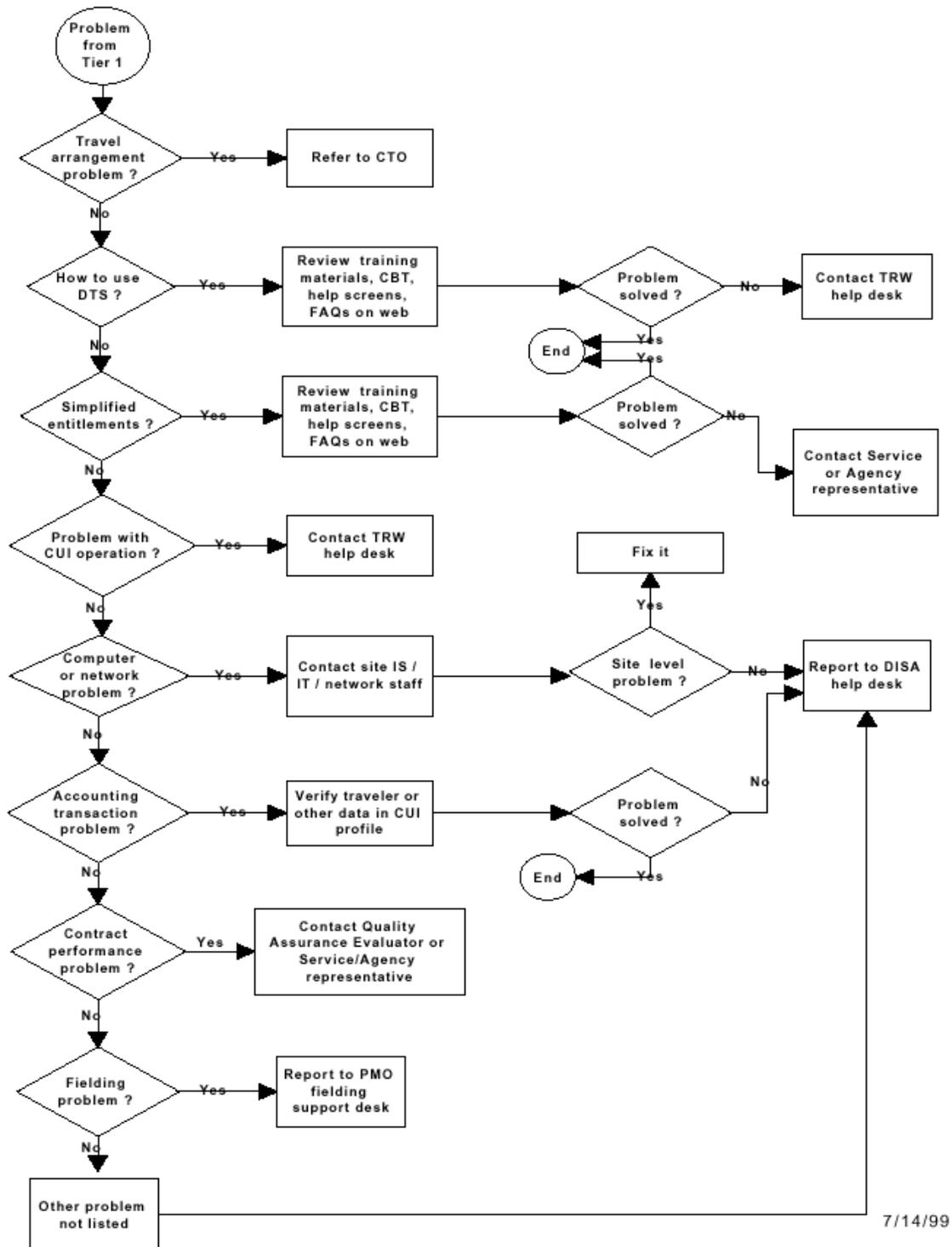
Problems may be elevated to tier 3 help desks via telephone call, e-mail, or FAX. A web browser trouble ticket system is also in development. Tier 3 Help Desks will utilize automated call tracking systems and a shared knowledge base to track problems and record lessons learned. Detailed tier 3 standard operating procedures (SOPs) will be provided to DTAs prior to their organization's transition to the DTS. Appendix 3 contains general problem resolution flow charts for tiers 1, 2, and 3. Detailed SOPs are in development.

Integrated System Approach

The following is a list of the integrated systems making up the end-to-end DTS and the primary organization responsible for each:

System Responsible	Agency
Public Key Infrastructure(PKI)	Defense Information Systems Agency(DISA)
Common User Interface (CUI)	TRW (Contractor) & PMO-DTS
Virtual Public Network (VPN)	DISA/Services/Agencies
Electronic Commerce Processing Node (ECPN)	DISA
Defense Accounting & Disbursing System (DADS)	Defense Finance and Accounting Service(DFAS)/Services/Agencies
Electronic Funds Transfer (EFT)	Federal Reserve Bank (FEDLINE)
Financial Institutions	Numerous commercial financial organizations
Archive/Management Info System	Defense Manpower Data Center (DMDC)
Installation ADP/Network Infrastructure	Installation
Government sponsored charge card	DFAS (Bank of America)
Travel arrangements	Travel Services Contractor

Tier 2 DTA General Problem Flow¹



¹ Help Desk Guide to Operations: Defense Travel System Help Desk Concept of Operations. Version 2.0. 6/15/00.



ANNEX A

HELP DESK—HOW CAN WE HELP?

Travelers—Before You Pick Up The Phone...

The help desk staff will need background information to better assist you. In order to minimize the time needed and to optimize the effort expended to resolve your issues, you should be prepared to answer several questions before you place your support call:

Information you should have available or *include in emails and faxes*

Your Name
Your phone and fax numbers
Email address

Make any notes that may be helpful and a list of your questions, and be prepared to take notes. If leaving a message, speak slowly and clearly. Leave name and number where you can be reached. And, if possible, a very brief description of the problem.

In which environment are you running?

PC or Mac
Operating System (windows 98, 2000, System7)

Which error messages did you receive?

Capture with Print Screen if necessary

What was happening when the problem occurred?

At what point were you in the travel process? Entering data? Selecting travel arrangements?
Is the problem new, has it occurred before?

What were you trying to do?

Was there anything unusual about the environment when the problem occurred?

Do you have any idea what the problem might be? For example, are you aware of any recent changes in the system environment or in the application?



ANNEX B

Feedback Form

To optimize the Help Desk operation and increase effectiveness, please take a few minutes to provide feedback on your Help Desk experiences.

Directions

For each question on the form below, select the answer that best describes your response and fill in the corresponding circle.

Question	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
The Help Desk responds to calls in a timely manner.	0	0	0	0	0
The staff is courteous and professional.	0	0	0	0	0
The staff is technically knowledgeable in DTS software.	0	0	0	0	0
The staff demonstrates understanding of travel policies and procedures.	0	0	0	0	0
The staff is able to solve problems and answer questions quickly and effectively.	0	0	0	0	0

Are there any comments or suggestions for improvement you would like to make?

Thank you for your suggestions.



ANNEX C

Acronyms

AO	Authorizing Official
CBT	Computer-Based Training
CTO	Commercial Travel Office
CUI	Common User Interface
DADS	Defense Accounting and Disbursing System
DFAS	Defense Finance and Accounting Service
DISA	Defense Information Systems Agency
DMDC	Defense Manpower Data Center
DoD	Department of Defense
DTA	Defense Travel Administrator
DTS	Defense Travel System
ECPN	Electronic Commerce Processing Node
EFT	Electronic Funds Transfer
FAQ	Frequently Asked Questions
FSO	Financial Services Office
LAN	Local Area Network
ODTA	Organizational DTA
PKI	Public Key Infrastructure (digital signature)
POC	Point of Contact
PMO	Program Management Office
VPN	Virtual Public Network