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## Help Desk Work Products and Deliverables

[HD Main](#)

### Work Products and Deliverables:

The following are the typical work products and deliverables for a help desk.

- **Help Desk Plan** - Describes the approach, methodology, roles and responsibilities and implementation of the help desk.
- **Help Desk Procedures** - Describes the specific procedures for operating a help desk, including caller etiquette, transferring calls, and handling emergency calls.
- **Help Desk Tickets** - The specific details for a particular call or the running history of a specific problem reported to the help desk.
- **Tracking Metrics for Phone Systems/Calls (optional)** - The following are some sample metrics that may be used to track the volume of calls to the help desk and their profile.
  - Number of Calls Received during the Month
  - Number of Calls Terminated before reaching a Representative
  - Number of Callers who received a Busy Signal
  - Average Wait Time for the Month
  - Longest Wait Time for the Month
- **Tracking Metrics for Items Reported** - The following are some sample metrics that may be used to track items reported to the help desk and their resolution.
  - Number of Open Help Desk Tickets (overall)
  - Number of Tickets Opened during the Month
  - Number of Tickets Closed during the Month
  - Number of Tickets Transferred to another Organization during the Month
  - Oldest Open Ticket(s)
- **Help Desk Reference Materials** - The help desk should have access to the following project materials to assist in resolving user questions and problems.
  - User Manual(s)
  - Design Documents
  - Requirements Documents
  - System Release Notes for each Release

- Change Request System
- Problem/Defect Tracking System
- Issue Tracking System

**Samples:**

- [Help Desk Plan Outline](#) (MS Word)
- [Help Desk Procedures Outline](#) (MS Word)
- [Request Comparison Matrix](#) (MS Word)

## Request Comparison Matrix

	ISSUE	PROBLEM REPORTS	HELP DESK TICKET	CHANGE REQUEST
Definition	A statement of concern or need that is formally recorded and tracked that... - is known ahead of time, or is in the project workplan, but whose resolution is in question or lacking agreement among stakeholders; - is highly visible or involve external stakeholders such as requests from control agencies; - has critical deadlines or timeframes which cannot be missed; - Results in an important decision or resolution whose rationale and activities must be captured for historical reasons; or - May impede project progress <sup>1</sup> .	An instance where the system, application, or environment does not behave as expected.  Also referred to as - defects - incidents - fixes	A record of a call/contact by a user/stakeholder regarding a POTENTIAL problem or a question.  If the item can be addressed by the help desk the item is closed.  If the item cannot be addressed by the help desk, it usually is converted/forwarded to the Problem Report process.	A request to change the existing functionality or scope of the system/application. The system current works as expected, but additional or new functionality may be desired.
Relationships	Issues may trigger change requests or risks.	Problems may trigger issues to determine the appropriate resolution	Tickets may trigger issues, problems or change requests	Change requests may trigger issues to determine the appropriate resolution
Decision Body	PMs	PMs or CCB	Help Desk Manager	CCB
Applicable Phase(s)	All (Initiation thru Closeout)	Starts in Unit Testing	After Implementation	After requirements are baselined (either during Procurement or Development)
Typical Result	New and/or updated policy, requirement, approach	Code fix implemented in system	User problem resolved or forwarded to other request system	New functionality implemented in system
Responsibility	Project; Contractor may also have their own internal system	Developing Organization	Either Project or Contractor	Project and/or Contractor <sup>2</sup>

<sup>1</sup> If an issue it is known that an issue is likely to impede project progress, it should be tracked as a risk, or it may be tracked both as an issue (for analysis) and a risk (for mitigation and/or contingency actions).

<sup>2</sup> Usually project has their change request system and the contractor has their own system and they cross-reference. Or the project can have the only system.

*Note: Items in parentheses are considered optional, depending on the request and the project's approach to tracking.*

## Request Comparison Matrix

### Typical Fields

	Issues	Problem Reports	Help Desk Items	Change Requests
Unique Tracking Number	x	x	x	x
Date of Report	x	x	Date and Time	x
Title	x	x	x	x
Status of Request/Date	x	x	x	x
Category/Type	x	x	x	x
Version Detected		z	z	z
Phase Detected	x	x	x	x
Phase Corrected	(x)	x	(x)	x
Escalated To/Date	x		x	x
<b>Contact Information</b>				
Author	x	x	x	x
County/Office Location	x	x	x	x
Author Phone	x	x	x	x
<b>Item Information</b>				
Date of Occurrence	x	x	x	x
Need Date or Date of Anticipated Impact	x	x	(x)	x
Description of Item	x	x	x	x
<b>Analysis Information</b>				
Analyst Assigned To/Date	x	x	x	x
Impact Analysis	x	x	x	x
Scope Impact	(x <sup>3</sup> )			x
Customer Impact	(x <sup>3</sup> )	x	x	x
Dependencies/Conflicts	x	x	x	x
Training Impacts/Changes	(x <sup>3</sup> )	x	x	x
Impacts on other pending	x	x	x	x

<sup>3</sup> Not all issues will require a scope, customer, training impact, etc. field. For instance, an issue involving a policy change decision may affect cost, schedule, training, etc.; an issue involving a stakeholder request for information would not.

*Note: Items in parentheses are considered optional, depending on the request and the project's approach to tracking.*

## Request Comparison Matrix

	Issues	Problem Reports	Help Desk Items	Change Requests
Changes/Problems/Issues				
Impacts to system performance/capacity	x	x	x	x
Severity of Problem	(x <sup>3</sup> )	x	x	
Proposed Solution/Alternatives	x	x	x	x
Affected Areas	x	x	x	x
Applicable/Affected Requirements	(x <sup>3</sup> )	x	x	x
Affected Documentation	(x <sup>3</sup> )	x	x	x
Work-around	(x <sup>3</sup> )	x	x	x
Risks	x			x
Proposed Cost	(x <sup>3</sup> )			x
Proposed Schedule Impacts	(x <sup>3</sup> )	x	x	x
Analysis Time/Completed Date	x	x	x	x
Cross-reference to other Issues, Problems, Changes, Risks, Calls	x	x	x	x
<b>Decision Information</b>				
Approved Resolution	x	x	x	x
Approved By/Date	x	x		x
Assigned To for Resolution/Date	x	x	x	x
Due Date	x	x	x	x
Priority	x	x	x	x
<b>Resolution Information</b>				
Progress Notes/Date	x	x	x	x
Implementation Time	x	x	x	x
Closed By/Date	x	x	x	x
Verified By/Date		x	(x)	x
Test ID/Date		z	(x)	x
Verification Time		x	(x)	x
Implemented Version of Code/Release Number		x	(x)	x
Updated Document Versions	(x <sup>3</sup> )	x	x	x
Prevention/Process Improvement		x	x	x

*Note: Items in parentheses are considered optional, depending on the request and the project's approach to tracking.*

### Request Comparison Matrix

	Issues	Problem Reports	Help Desk Items	Change Requests
Notes/Comments	x	x	x	x

*Note: Items in parentheses are considered optional, depending on the request and the project's approach to tracking.*