



## **“5 Years and Counting”**

# **The Technology Help Desk California State University, Long Beach**

**Annual Report  
July 2005**

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*“Emphasizing the importance of the whole and the interdependence of its parts”*



## Table of Contents

Table of Contents .....	2
5 Years and Counting - The Technology Help Desk at CSULB .....	4
Historical Perspective .....	4
A Look Back – Past THD Documents .....	5
2000-01 Highlights .....	5
2001-02 Highlights .....	5
2002-03 Highlights .....	5
2003-04 Highlights .....	6
Recap and Results: 2004-05.....	6
Remedy - Licensing .....	6
Student Assistant “Bubble” .....	7
Spin-off of THD Students to Academic Affairs .....	7
THD Professional Staffing.....	8
Multiple Locations .....	9
Remedy – Campus Partners .....	9
Remedy – Data Opportunities.....	10
Data Recovery Services .....	11
Exemplary Practices of THD .....	11
Provides Single Point of Service to Campus Community .....	11
Student Support Representative Hiring Process .....	12
Student Support Representative Long-term Retention .....	13
Student Support Representative Training Program .....	13
Flexible Call Center / Walk-In Service Center Model.....	14
Campus Software Distribution.....	14
Budget Perspective.....	14
Student Assistant Expense by Year 2000-2005 .....	15
BATS – Baseline Access to Technology and Support.....	15
Other Budget Savings .....	16
Performance Metrics.....	16
Total THD Resolved Cases by Year 2000-2005.....	17
THD Case Type by Percentage 2004-05 .....	18
CSULB Internet Accounts .....	18
TIM – Tivoli Identification Manager.....	18
BeachBoard.....	18
My CSULB .....	18
Email .....	19
General Information.....	19
Software (ACS Software Distribution).....	19



Other .....	19
THD Unique Web Visitors by Year 2000-2005 .....	20
THD Call Center Efficiency .....	21
Percentage of Calls Answered within 20 Seconds.....	21
Total Call Handling Time .....	22
Service Response .....	23
Technology Help Desk Satisfaction Statistics .....	23
Technology Help Desk – Faculty Contacts .....	24
Staff Roles and Responsibilities .....	25
Dan Olsen.....	25
Technology Help Desk .....	25
Division of Academic Affairs.....	25
Campus Help Tracking System - Remedy.....	26
Thuy Nguyen .....	26
Student Support Representatives .....	26
Outlook: Mid to Long-Range Goals .....	27
Direct Reporting Line .....	27
Maintain Autonomous Operations.....	28
University Library Influence.....	28
Future Collaboration with Library .....	28
Future Oriented Planning Issues .....	28
Other Planning Issues for 2005-06 .....	29
APPENDIX A – THD Proof of Concept (March 2002).....	30
APPENDIX B – Help Desk Goals 2000-2001 .....	32
APPENDIX C – Pilot Project Guidelines (April 2000).....	34
APPENDIX D – Progress Report (April 2000) .....	36
APPENDIX E – Accomplishments 2001-2002 .....	38
APPENDIX F – THD Planning 2002-2003.....	39
APPENDIX G – THD Profile 2002-2003 .....	41
APPENDIX H – CSU Survey of .....	44
Exemplary Technology Programs 2003.....	44
APPENDIX I – THD Staff Training Agenda – Fall 2005 .....	47
APPENDIX J – Proposal to Bats Committee (March 2005) .....	50
APPENDIX K – THD Mission Statement <b>**NOT APPROVED**</b> .....	52



## 5 Years and Counting - The Technology Help Desk at CSULB

The Technology Help Desk at California State University, Long Beach is a highly successful campus technology organization, built using the best practices from academia and private industry.

The THD is an exemplary service within the California State University system, providing front-line support on the mission critical campus applications (BeachBoard, My CSULB, Campus Email) for all faculty, staff and students. The THD mission includes treating all customers with courtesy and respect, answering the phones fast, providing correct answers quickly, and always leaving the customer with an answer or next step. The THD views the campus in a holistic manner, *emphasizing the importance of the whole and the interdependence of its parts.*

The THD is also very cost effective, providing a best of both worlds experience by utilizing student assistants as front-line Student Support Representatives and offering them a professional work environment and preparation for their future careers.

### Historical Perspective

The history and success of the THD has strong ties to the BATS committee. The help desk concept was first identified in the CSULB "Baseline" Hardware/Software Access, User Training and Support Plan dated January 31, 1997 and was reviewed by the BATS committee during FY1998-99. This resulted in startup funding for the Help Desk as a "proof of concept" project (APPENDIX A) for FY1999-2000 and provided specific funding for:

- Hiring and permanent funding of a Help Desk manager
- Purchase of Remedy Call Tracking software and 8 introductory licenses
- Startup funding for hardware purchases and furniture

From its opening in Fall 2000, the THD has shown steady growth in each year of operation. This growth is accomplished through supporting new applications, supporting new departments and inherently through the expansion of campus teaching and learning tools including BeachBoard and My CSULB. All front line support is handled by 14-20 part-time Student Assistants serving as Student Support Representatives. They are experienced (nearly 100% retention rate) and perform in a manner reflective of our values: viewing the University in a holistic manner, high availability, getting the answer right, treating all customers in a professional manner, and providing a positive referral if necessary. Their effort is supported by a full-time staff member and the Manager who serve as second level support as well as managing the administrative, outreach and day-to-day operations. THD supported applications cross all campus Divisions and include:

- My CSULB
- BeachBoard
- Namemaster/CSULB Webmail/Email Accounts



- TIM
- CMS / PeopleSoft
- Anti-Virus
- Windows and Mac OS

The THD is the exclusive provider of high-availability front-line technology support for students who now are required to use campus mission critical websites and tools including BeachBoard and My CSULB on a daily basis. The THD is clearly established as a core baseline service and is the central point of contact on campus for technology and computer support for students, faculty and staff:

- Walk-In Service Center (Horn Center Lobby)
- Call Center/Telephone: 562-985-4959
- Email: [helpdesk@csulb.edu](mailto:helpdesk@csulb.edu)
- Web: [www.csulb.edu/helpdesk](http://www.csulb.edu/helpdesk)

## **A Look Back – Past THD Documents**

Planning ahead has been a part of the THD annual cycle since inception. While the overarching goals continue to be similar, the specific priorities do change from year to year. Please find the attached appendices to this report several examples of previous years planning documents and reports to add some historical perspective to this process.

### **2000-01 Highlights**

The first year of operation laid the foundation and culture for the THD for future years.

See APPENDIX B – *Help Desk Goals 2000-01*  
See APPENDIX C – *Help Desk Pilot Project Guidelines*  
See APPENDIX D – *ACS Help Desk Progress Report*

### **2001-02 Highlights**

Major accomplishment for the year included the opening of the THD Walk-In Service Center in the North Campus Center lobby and participating in SOAR for the first time.

See APPENDIX E - *THD Accomplishments for 2001-02*

### **2002-03 Highlights**

THD continued to grow and expand as the campus adds the My CSULB portal and BeachBoard use grows to nearly 1000 courses.

See APPENDIX F - *Technology Help Desk Planning 2002-03*  
See APPENDIX G - *Technology Help Desk Profile - Fall 2002*



See APPENDIX H - *CSU Survey of Exemplary Technology Programs or Projects (Submitted to CSU Chancellors Office - January 2003)*

### **2003-04 Highlights**

As is much of the University, the THD really feels the pinch of budgetary cuts, resulting in a reduction of hours and staffing, and some loss of service to the campus community.

### **Recap and Results: 2004-05**

The following document was prepared for Dr. Richard Outwater, Associate Vice-President, Academic Information Technology on July 1, 2004, citing the "*Challenges and Opportunities*" facing the Technology Help Desk organization for FY 2004-05. A "one-year later" review and status update follows each item in italics.



## **Technology Help Desk Challenges and Opportunities July 2004**

**Prepared by: Daniel Olsen, Technology Help Desk Manager**

### **Remedy - Licensing**

THD management made a strategic decision to cancel of our Remedy Support contract effective July 1, 2002 based primarily on a cost / risk analysis. Licensing is based on a percentage of the value of our server and user licenses and in our present situation would run approximately \$20,000 annually. By falling out of support, we are not eligible for software upgrades we might be interested in.

On the plus side, we have relationships with 2 Remedy support consultants who can offer us excellent support at a cost of \$600 to \$1850 per day. These consultants have a bagful of resources and tools and likely can accomplish everything and more than we could get from Remedy support. The risk is that in an emergency, they may not be able to react as quickly as we would like and downtime is a possibility.

*The good news is that we survived another year without catastrophic failure or utilizing any outside consulting to keep the Remedy program going. Fiscally, it is a big win, continuing to keep our costs down while keeping the benefits of the application.*



*The bad news is mounting. During the past year, the CSU Chancellors Office upgraded to the latest version of Remedy, leaving our campus behind and forcing users of both systems (primarily CMS users) to have separate desktop applications where in the past the same Remedy User application was shared between servers. While we are able to continue making important definition and user configuration changes, we are unable to meet some of our needs for minor programming requests that are beyond system configuration and our inability to respond has resulted in some loss of goodwill.*

*We are beyond “catching up” on versions. Our future direction may or may not include Remedy, but out of necessity we will require a new system. We need to take the next steps and define a new strategy for the University moving forward. (see additional comments below regarding Remedy)*

### **Student Assistant “Bubble”**

As the THD grew, it was intended to have a consistent refreshing of student assistants so that there would always be experienced staffers on hand. The inability to hire over the past 2 years has left a gap, or bubble, where we will experience nearly 100% turnover between Spring 2005 and Fall 2005. This is an unpleasant prospect that risks our quality of service – unless we are able to bring some new talent into the fold and develop their experience soon. NOTE: We have prospects that have been interviewed and are ready for hire immediately.

*We weathered this storm without difficulty. In fact, the potential for letdown was made worse when one of our Senior Student Support Representatives, James Callahan, was hired as a staff member by the Faculty Technology Center (Note: This was a great move for everyone. The THD, as part of its program, is developing people for outstanding careers, in our out of the University, and will always have new, high-quality talent in the pipeline).*

*For the first time, our Federal Work Study hiring produced extremely high-quality students and we ultimately rolled 4 of them into our regular SSR staff – this is a very pleasing development since they will be returning in the Fall to continue working with the THD. Despite this significant challenge, the THD is strong and ready to go for Fall 2005.*

### **Spin-off of THD Students to Academic Affairs**

With the advent of Andreea Martin’s position with AA and the AA Web Template project, 2 of my 3 Senior Support Representatives have been diverted 100% to those projects. With few new hires, this leaves the THD effectively down 2 of our strongest experts and trainers. We continue to foresee the need to have students in the role of AA support and web template in support of Andreea (vacations, sickness, other).



*This change worked out perfectly, lending necessary support to the Academic Affairs Web Template project and providing a backup to Andreea Martin during her maternity leave (August-September 2005) and beyond. With the hiring of Tim Rudolph as a full-time staff member, we expect to add a maximum of 1 new student in this role for the upcoming year to continue our progress and pipeline in this area.*

## **THD Professional Staffing**

The THD has been operating in a high-growth mode since inception; however the only staff changes we have seen have been the reduction of 1 FTE employee (Sarah Budd). Her responsibilities have fallen back to Thuy and me, and we are coping, however it is not a good long-term situation.

Additionally, we would like to lay the groundwork and a career path for several of my outstanding student assistants. The 3 Senior Support Representatives (Nupur Shah – 4 years experience, Tim Rudolph – 3 years experience, and James Callahan – 2 years experience) are as responsible and knowledgeable than many regular staff members we have come across. They each have remarkable skills that would be a tremendous asset to our organization as full-time staff members.

Nupur has been expert in developing our THD campus web presence and has further excelled on the AA Web Template project. Nupur had just turned 17 when he joined us in the Summer 2000 as our first student hire. This is his first and only job. Major – Computer Science (grad Spring 2005, prospective MBA)

Tim joined the THD as a lower level support representative in Summer 2001 but quickly transitioned into a Senior role. Tim assumed the full-time staff duties of Andreea Martin during her leave over Summer 2003 and has since served as her more than capable backup. Tim has also excelled with his drive and expertise on the AA Web Template project. His dedication and determination is commendable to the highest degree. Tim is a MIS major (grad Spring 2005, prospective MBA).

James joined the THD in Summer 2002 after a 20 year career in the United States Marine Corps. He has incalculable enthusiasm, desire and earns the highest marks ever reported by the THD for an employee in attitude. He is a computer expert, aware of both the latest and archival systems. He is a part-time lecturer at Cerritos Community College. James is a Computer Science major (grad Summer 2004, prospective MS Computer Science).

It is impossible to rank them further, except to say that all three: 1) would make exceptional employees of this university; 2) desire to work here long-term; and 3) we want them on the CSULB team. Is it possible to explore the possibility of bringing them on staff?

*In all fairness, this can be summed up as the “It was the best of times, it was the worst of times”.*



*We could not be more pleased that Tim Rudolph (Academic Affairs Webmaster / THD), Nupur Shah (College of Business Administration Webmaster) and James Callahan (Faculty Technology Center) have all been hired as full-time employees of the University. It truly validates the quality of the THD program that is producing such high-quality and valued talent that are so highly demanded by managers across the University. We take personal responsibility for the development and quality of our student staff and nothing we have done since the inception of the THD has given me more personal satisfaction.*

*On the other hand, in this process, the THD only gained .25 FTE (Tim Rudolph). We are still down .75 FTE from the beginning of 2002 when we lost the full-time Sarah Budd staff position. We remain truly disappointed that the THD, despite significant growth and improvements in quality, still are operating at a staffing level below that of 2001-2002 and grossly below that of our peers in the CSU system.*

### **Multiple Locations**

It is very difficult to manage 2 work locations that are open nearly 80 hours per week with just 2 staff members. The THD Call Center in LA5 and the Walk-In Service Center in the Horn Center are both necessary and effective operations, however staffing coordination and oversight is very difficult.

We have proposed an aggressive plan to move the entire THD operation down to the Horn Center and assume the location at the inner service desk on the northeast wall and the office space behind it. This would allow us to effectively manage work load based on need (Walk-In vs. Calls/Emails) and keep student staffing levels lower in addition to allowing us to continue on with limited professional staff positions. There are significant cost savings associated with this proposal.

Additionally, there are soft benefits that include: 1) potential removal of the entryway desk to create more space for computers and seating; 2) excellent proximity to the new Faculty Technology Center; 3) closer proximity to Network Services and Academic Computing Services staff. This is a win-win-win opportunity, however we recognize that there is a campus emergency response center that has eminent domain over that space, but this proposal makes sense.

*We have achieved total and complete failure to improve this situation despite the Horn Center renovation taking place throughout the year.*

### **Remedy – Campus Partners**

The campus is highly decentralized when it comes to technology and computer support. As such, many of these organizations utilize their own software for tracking, managing and reporting support calls. We have proposed for several years now that the campus



look at a central tracking system to meet the needs of the entire campus. To that end, Remedy is currently used by the following support organizations:

- Technology Help Desk
- Network Services – Desktop Support
- Network Services – Server Administration (includes BeachBoard Technical, TIM / LDAP Technical)
- Faculty Technology Center (includes internal project tracking)
- CMS Financial Information Systems - Help Desk
- Financial Management Information Systems – Desktop Support

There are other groups that have used Remedy on campus, but have been unable, or have undergone personnel changes that have made it difficult to continue. Also, the system administration of Remedy is taken along with the managers other responsibilities, and to do it right would take no less than a half-time staff member dedicated to the application and growing the usage on campus.

The biggest opportunity is to include the college techs in the Remedy program. Then all cases would be logged and managed through a common system. We have proposed that a committee be established to explore the future potential of a University-wide common tracking system.

*For several reasons we have made no progress in this area – primarily that other operational priorities supercede this project. The most effective way to approach this will be through the University Information Technology Committee, which for 2005-06 will have the responsibility of recommending technology policies rather than evaluating BATS dollars for budget purposes. The UITC might see this for the opportunity that it is and be willing to put some impetus behind the effort.*

### **Remedy – Data Opportunities**

The campus Remedy application is integrated to the campus Namemaster (email) and TIM (LDAP) systems using the Remedy Import Tool, a scripting tool that parses an import file into Remedy. A nightly feed is received from Network Services and updates Remedy fields with simple user data including: Campus ID, Last Name, Full Name, email address and a rough interpretation of Student, Faculty or Staff status. This data is used by the THD first to authenticate customer's entitlement to service, and second for the detailed call tracking functions.

We are missing critical data in this feed that would require data from other sources. The Remedy People form has fields available for immediate use including person department information, campus phone number, preferred email address and more. To accomplish a more fully integrated system, this additional data must be delivered in a feed from CMS-HR and Telecommunication Services. The data would then be integrated with the existing TIM data to create a complete data set to be used to populate Remedy. We have



not aggressively pursued these options to date since we believe we need to address the campus Remedy status holistically prior to taking action.

*No progress has been made in this area.*

### **Data Recovery Services**

More frequently than ever, the THD is receiving requests from the campus to restore data lost or corrupted from computers and computer media (cd's, zip disks, floppy disks). Thuy Nguyen of the THD has specific expertise and has been serving the campus on an ad hoc basis for several years, but the demand for this service is increasing. The cost to have a third party do data recover is very expensive and prohibitive in most cases. To become a data recovery resource to the campus, hardware and software will need to be acquired as the free tools we have been using are generally inadequate for most data recovery jobs.

*We have been very effective in continuing our data recovery services to the campus. In appreciation for this service, other departments have willingly purchased software for the THD to use on their and the campuses behalf. Early in 2005, the THD purchased a hardware device that has proved instrumental in salvaging critical data from several campus computers in distress.*

*Moving forward, it would be great to further publish these services, but even better to figure out a way to charge or charge-back for these services. A simple data recovery at a computer shop typically costs a minimum fee of \$150 just to start, and can become very expensive. Data recovery can be time consuming, but it is a critical service we can offer.*

## **Exemplary Practices of THD**

### **Provides Single Point of Service to Campus Community**

The single most important role of the THD is to provide a single point of contact to the entire campus community on the most commonly used and important campus-wide applications. Due to the decentralization of technology on campus, having an organization in place that is able and willing to take on the responsibility of front-line duties to the campus is essential to avoid creating confusion and giving customers the “run-around” as is often the case in our bureaucracy. In general, the THD has been aggressive in seeking out these partnerships where benefit to the University is clear. It takes tremendous effort and cooperation to achieve this mission – representatives of not only different department units, but divisional units must actively participate in the process. Future success in this area will only be achieved through active and regular communication with our partners.

We are in an enviable position to be able to offer front-line to support to all faculty, staff and students – many of our CSU peers have segmented this responsibility among several



support organizations with separate contact points and information – a model that is inconsistent with single point of contact. The THD has successfully filled this role for years and has been resoundingly successful.

On a disappointing note, in 2004-05, a new support help desk was established to handle password resets for staff members by the CMS Human Resource Information Systems organization, opened in the name of being a new “one-stop shop” without regard for the ramifications of resetting passwords that effect far more than their service expertise – and with willful omission of the THD as the standard for help requests on campus. Further, it defeats our mission of being the single point of contact for all faculty, staff and students by segregating them by class. THD management was unsuccessful in an effort to at least gain an executive review to ensure some organizational control over technology on campus. This type of self-serving action will defeat the excellent structure that already exists, and is clear evidence of the need for a centrally organized Chief Information Officer at the University.

**Student Support Representative Hiring Process**

The THD receives applications throughout the year for a very limited number of positions. Each year, well over 100 online job applications are received at the THD. They are reviewed, telephone interviewed and recommended for an in person interview if qualified. That session is approximately 3 hours, including the opportunity to take live calls along with an experienced Student Support Representative. This gives our team an opportunity to see how the candidate works in a team environment, their communication skills and a general view of their resourcefulness. On the other hand, it gives the candidate an excellent opportunity to see what it is like to work on the front lines of a help desk, and disqualify themselves if it is not a good fit. Finally, the candidates are ranked and the top candidates are offered positions with the THD; usually just a handful of candidates are selected prior to the start of each Fall semester.

**Technology Help Desk  
Student Assistant Job Applications Received  
2000-2005**

	<b>2000-01</b>	<b>2001-02</b>	<b>2002-03</b>	<b>2003-04</b>	<b>2004-05</b>
THD Jobs - Applications Received	13	72	158	187	210
THD Jobs - Hired	5	5	11	3	5
THD Jobs - Hired (by % of Apps)	38%	7%	7%	2%	2%

As the THD becomes more visible to incoming students through our activities with Student Orientation and Retention (SOAR), the number of applicants continues to increase. Expectedly, the THD is able to conduct careful evaluation and also guide selected applicants to other campus technology organizations that have specific student assistant needs.



### **Student Support Representative Long-term Retention**

The THD management philosophy is to hire the right people in the beginning, and invest in them throughout their career in order to achieve excellent long-term retention of Student Support Representatives. SSR's are evaluated each semester and at appropriate times for step increases based on the number of hours worked. However, no staff member of the THD will ever be surprised by their review. Feedback is given on a constant basis to ensure the professionalism and quality desired. The students gain knowledge and skills that will benefit them throughout their careers beyond the THD.

CSU Long Beach is a large commuter campus, and the THD becomes the social home of many of our SSR's. Over the years, the THD students have become a very close knit family, with the shared values of interest in computing and helping others. Not only do they work together but they play together as well. The THD offers extracurricular activities for the group throughout the year. Past activities have included: THD Night at the Ice Dogs, Paintball Tournament, countless movie nights, Graduation Parties and other celebrations, Casino Night party to name a few. The THD management believes in providing an outstanding work environment.

Our retention rates are outstanding. Last fall at the start of the semester, the average time in service for our student staff exceeded 2.5 years. It is extremely rare to lose a student assistant for disciplinary reasons – it has happened only once in 5 years, and less than a handful have left to pursue superior career opportunities or internships. But the goal of the THD is clear: Hire the right talent and retain them throughout their University careers. We have exceeded our expectations and done an excellent job meeting that goal.

### **Student Support Representative Training Program**

It takes a minimum of 6 months to become a good Student Support Representative, and often a year to achieve thorough proficiency. Mandatory formal training sessions are held before the start of each semester to go over any changes and reset expectations for the upcoming year. Training is typically a full day (APPENDIX I) and involves subject matter experts from across the campus. The most experienced SSR's become leaders and also presenters at our training sessions, particularly on THD Policies and Procedures.

Aside from the formal training, new students spend a minimum of one semester in the Call Center learning from experienced staff and sharing knowledge with their peers. After a semester they begin to integrate in the more visible Walk-In Service Center, where experience and maturity are more critical.

SSR's who become experts have the opportunity to become Senior Student Support Representatives. There is no prescription to become one, it is not based on time in service, but it is based on evidence of excellence in every respect. Senior Support Reps gain increased access to our systems and are often counted on as staff members in many situations. They are a valuable part of the THD staff. There have been a total of 4 Senior



Support Reps in the THD history. While there are none headed into 2005-06, 3 of the 4 have gone on to become staff members at CSULB.

### **Flexible Call Center / Walk-In Service Center Model**

Since the THD has 2 locations, the Call Center in LA5 on south campus, and the Walk-In Service Center in the Horn Center on north campus, managing work loads efficiently is critical. The WISC has primary responsibility to provide in-person service in a timely manner, while the Call Center has primary responsibility to answer phones and email requests rapidly. The Automated Call Distribution (ACD) system allows representatives at either location to log in, view the call queue, and jump in to fill immediate needs based on work load. Due to after-hours and weekend demand, and because there are only 2 full-time staff members in the THD, the WISC is able to take over all functions during those times, without requiring a THD staff member to 1) open and close the building; and for 2) security and safety reasons.

The ideal model would have a single place of business in a high-traffic computing center on campus, with private offices and Call Center behind a public counter or window to provide Walk-In service, ultimately allowing THD management to place staff in the ideal location at a moments notice to maximize our efficiency.

### **Campus Software Distribution**

The THD Walk-In Service Center is the primary point of contact for campus faculty, staff and other technology support staff for software distribution on behalf of Academic Computing Services. The THD accepts blank CD-R's in exchange for licensed, burned copies of the desired software in an effort to keep the software distribution a net zero cost operation. Each years, the selection of licensed software has changes based on the campus and CSU central purchases and we work in close cooperation with ACS to keep software inventory up to date.

### **Budget Perspective**

The THD is a fiscally efficient organization, in the past relying primarily on grants and soft funding to provide necessary services. The budget is relatively simple, consisting of the following elements:

- Professional Staff
- Student Assistants
- Supplies and Services
- Telephony
- Professional Development



Aside from the 2 full-time staff members, the largest chunk of the Technology Help Desk budget is consumed by student assistant payroll. The THD has been fiscally successful by utilizing students in favor of adding professional staff, believing that students can be trained and can perform to high professional standards. This model differs slightly from many of our peer Help Desk's in the CSU system, who have more professional staff with a smaller number of students. The THD model puts additional pressure on the staff members to acquire and prepare the student assistants, but the end result is a cost model that places more available Help Desk representatives in front-line seats and significantly faster response times to our faculty, staff and students.

**Student Assistant Expense by Year 2000-2005**

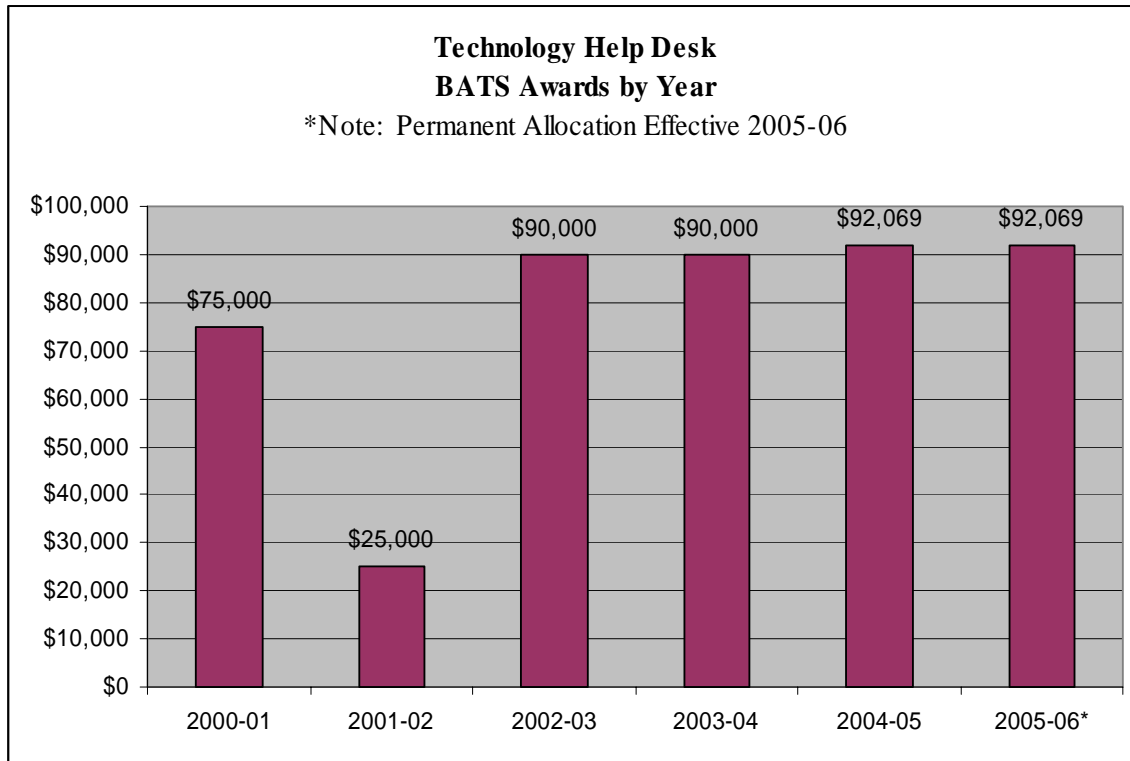
<b>Student Assistant Payroll</b>	<b>2000-01</b>	<b>2001-02</b>	<b>2002-03</b>	<b>2003-04</b>	<b>2004-05</b>
THD	\$35,539.33	\$83,380.21	\$107,383.65	\$116,066.30	\$86,374.22
FWS			\$13,533.00	\$16,798.00	\$14,001.00
AIT - Academic Affairs Web Projects					\$25,611.02
<b>Total SA Payroll</b>	<b>\$35,539.33</b>	<b>\$83,380.21</b>	<b>\$120,916.65</b>	<b>\$132,864.30</b>	<b>\$125,986.24</b>

The THD student assistant payroll has been augmented by annual BATS allocations that bring the annual expenditure from the regular state budget down significantly. Of course, the THD was awarded a permanent budget allocation from student assistants from BATS of \$92. Additionally, the THD has learned to effectively use Federal Work Study student to augment the busiest times of the school year. The specific drop in payroll associated with the THD is due directly to a decrease in our operating hours for 3 consecutive years due to state budget cuts.

While the total student assistant expense line has remained relatively constant for the past several years, however the use of student assistants on the Academic Affairs Web project and to augment Academic Affairs Technical Support changed the dynamics of our allocation. The hiring of Tim Rudolph into that ¾ time role will significantly lessen, although not remove completely, the need for students in a web support role.

**BATS – Baseline Access to Technology and Support**

The Technology Help Desk has been a consistent recipient of campus BATS funding since its inception. The BATS committee, initiated to allow the campus to meet “baseline” access to technology and support guidelines, has clearly recognized the THD as a fundamental component of baseline standards and has rewarded it with critical operating budget. As the BATS committee has transformed into the University Information Technology Committee (UITC), the committee elected in 2004-05 to abolish the annual grant proposal system and make permanent allocations to selected programs that continue to allow the University to meet baseline goals. The THD received the largest single department/program grant in the amount of \$92,069 to continue funding the student assistants necessary to operation the THD (APPENDIX J).



### Other Budget Savings

In order to maintain excellent support levels in declining budget years, the THD has sought out creative ways to augment our limited budget:

Reduced Operating Hours – Annual Savings: \$5,000 to \$25,000

Combining WISC and Call Center – After Hours

CSULB Alumni Grants Award Winner: \$3,000

Cancelled Remedy Support Contract – Annual Savings: \$20,000

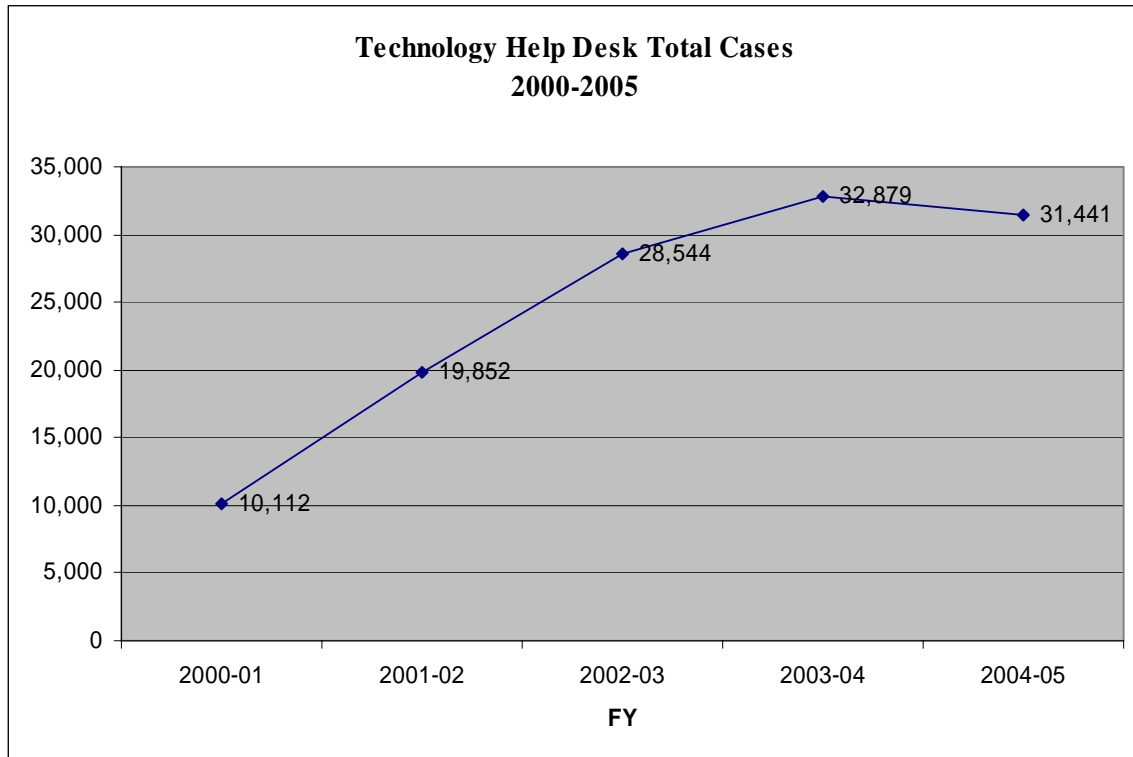
### Performance Metrics

The Technology Help Desk has recorded, compiled and reported detailed statistics to the campus community since its inception in September 2000. The statistics are culled from a number of systems used to manage the THD including:

- Remedy (administered by THD)
- Call Center Manager (administered by ITS /Telecommunications Services)
- THD Exchange Server (administered by THD)
- Website Tracking (administered by Extreme Tracking)



## Total THD Resolved Cases by Year 2000-2005 – Source: Remedy



The THD has successfully grown into a relatively consistent case load over the past 5 years while folding in new campus-wide applications including:

- CSULB Internet Accounts / Email / Webmail (2000)
- BeachBoard (2001)
- My CSULB (2003)
- TIM – Tivoli Identification Manager (2003)

As well as several additional focused applications:

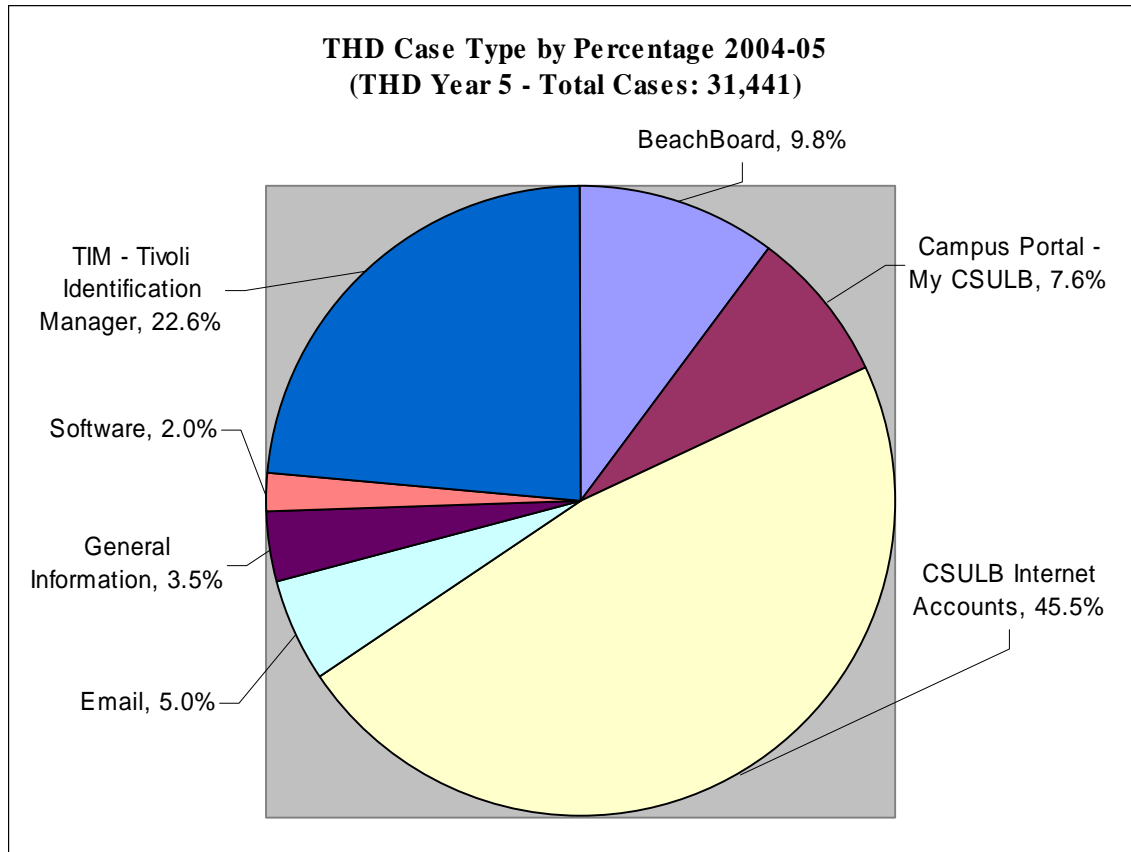
- General CMS Applications (2001-2002)
- Remedy (2001)
- Turnitin (2002)
- University Bookstore Online Textbook Requisitions (2002)

And general campus technical support requirements:

- Campus Network Issue Support
- Anti-Virus / Spyware
- Standard Productivity Software and Operating Systems
- Campus Software Distribution
- University Website Navigation and usage



### THD Case Type by Percentage 2004-05 – Source: Remedy



There are numerous common problems we resolve within each of these groups:

**CSULB Internet Accounts** (System Administration: Network Services) –

*New Account Creation, Password Resets, Account Renewals*

**TIM – Tivoli Identification Manager** (System Administration: Network Services) –

*Password Resets, Restore Accounts, Assist Proper Use of System*

**BeachBoard** (System Administration: Faculty Technology Center) –

*Assist Proper Use of System, Faculty Course Administration*

**My CSULB** (System Administration: Enrollment Services / ITS) -

*Assist Proper Use of System, Student Registration, Personal Portfolio, Set Primary Email Account, Faculty Grading, Intent to Enroll*



**Email (System Administration: Network Services) –**

*Assist Proper Use of System, Webmail, Various Email Configuration, Vacation Message*

**General Information –** *Could be anything regarding CSULB!!*

**Software (ACS Software Distribution) –**

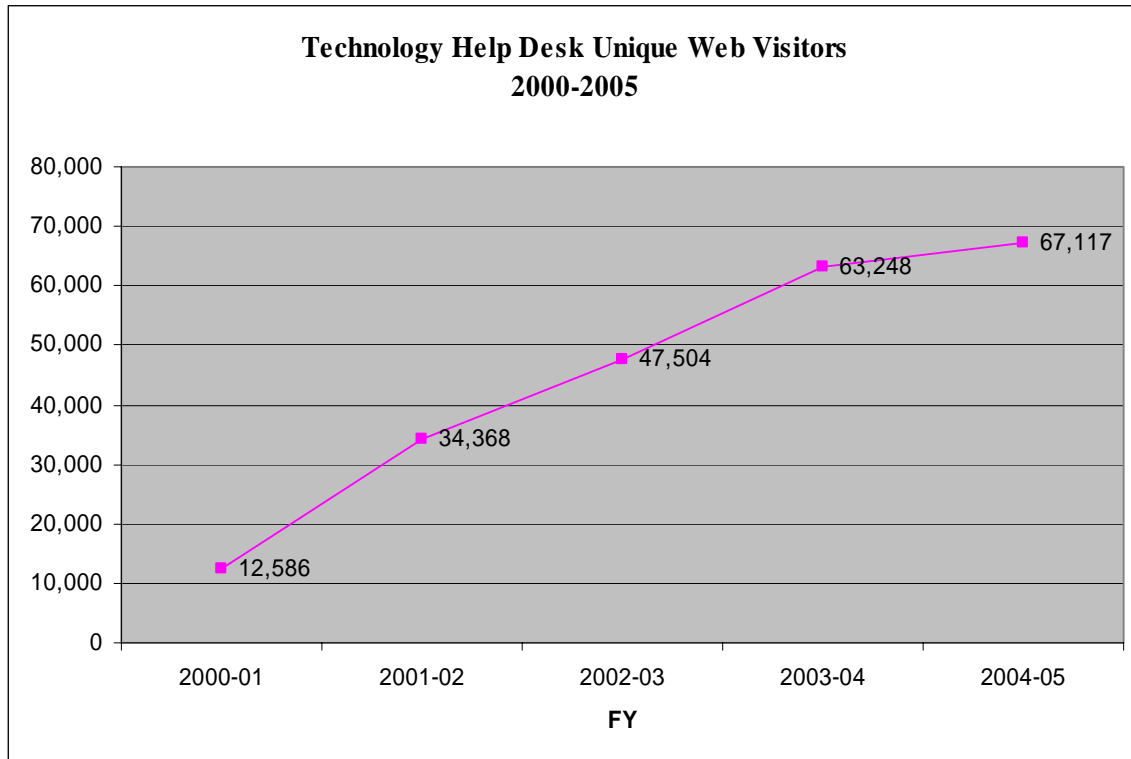
*Distribution of campus software to faculty and staff on behalf of ACS, Support various campus supported software including Microsoft Office*

**Other –**

*There are literally hundreds of other types of requests that come in to the THD including CMS, PeopleSoft, Turnitin, Campus Website, Remote Connectivity, Operating Systems, Anti-Virus and Spyware*

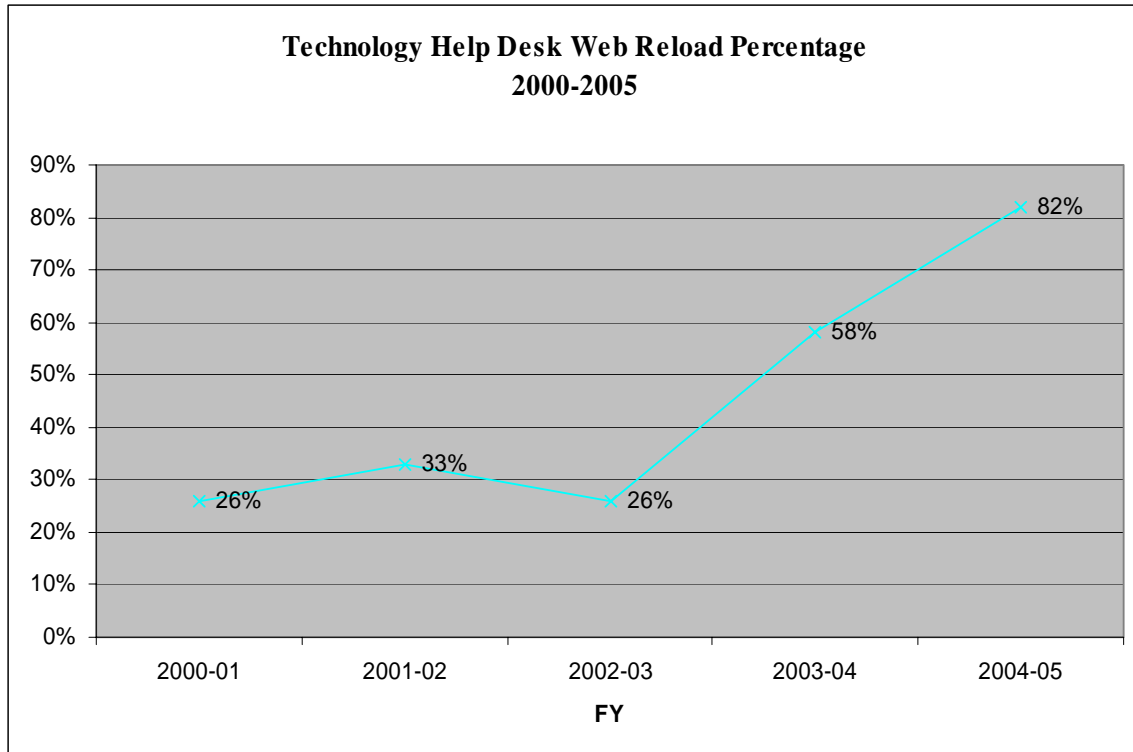


### THD Unique Web Visitors by Year 2000-2005 – Source: Extreme Tracking



Clearly the internet has become the most important information dissemination tool available to the University, and as such, the THD website has grown in response to the demand. The THD website consists of 105 information and tutorial pages, and links to hundreds of other University websites. The THD is a leader and contributor to the campus web template committees. All THD web pages are fully deployed on the campus web template, are ADA compliant and accessible to facilitate a consistent user experience on the CSULB web.

The number of unique user page views has grown to over 67,000 per year from only 12,000 in the first year. Although it is difficult to ascertain whether the website is specifically meeting the needs of the customers and answering questions before they contact the THD directly, a correlation can be made that THD website use is still on the increase while overall THD cases are flat to slight decline in 2004-05. Additionally, website visitors are staying longer and visiting significantly more pages on the site, an indication of a robust site with valuable information.

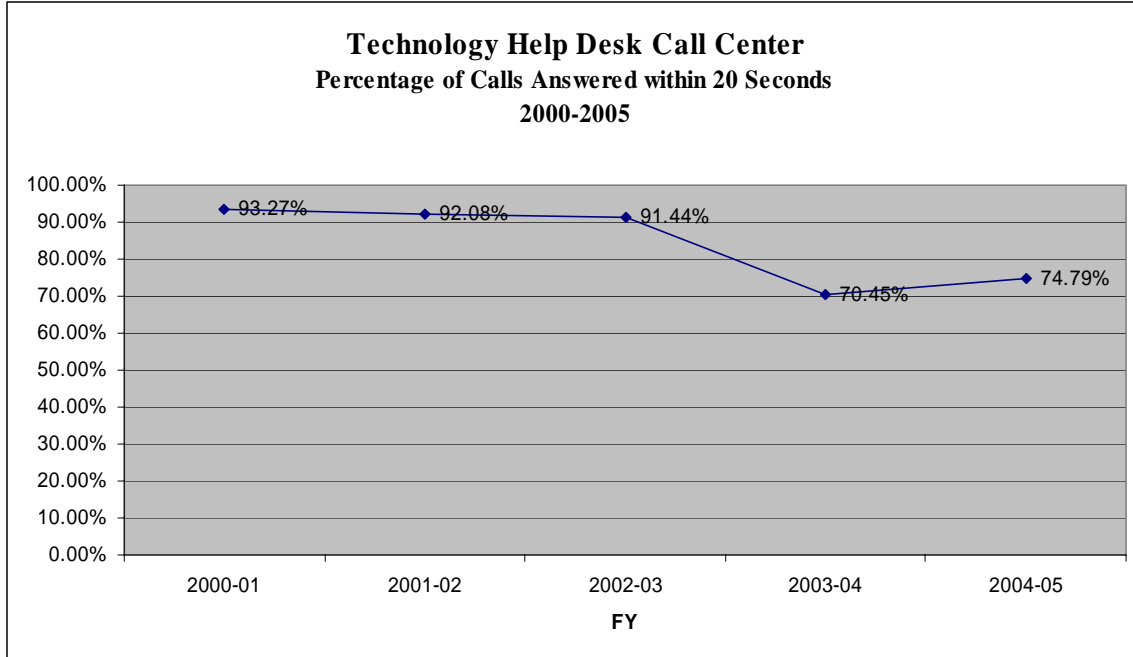


### **THD Call Center Efficiency**

The THD has been recording statistical data since opening day in 2000 from the Call Center Manager Automated Call Distribution system. Our results and performance have exceeded the highest standards of private industry and highlight the realistic trends of our organization and environment.

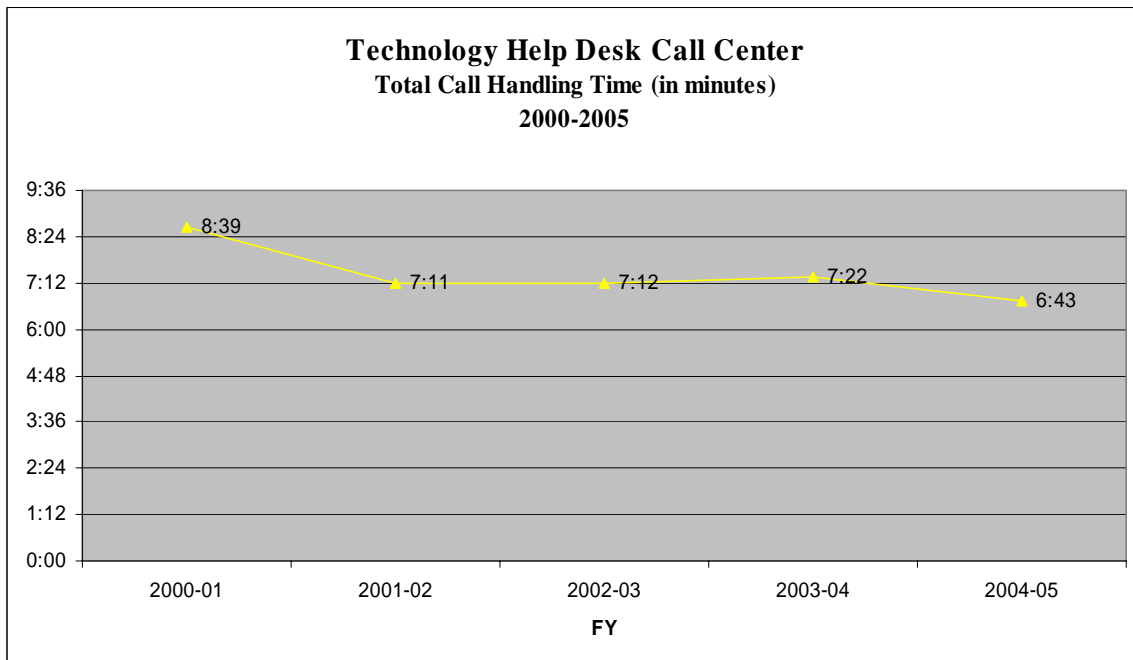
### **Percentage of Calls Answered within 20 Seconds**

A critical measure of success intended to meet one of our primary goals of answering the phone fast. While we have been very successful over the years, the decrease in the last two years is directly attributable to a significant increase in calls coupled with a lack of hiring imposed by budget limitations. However, the response percentages continue to exceed those of private industry.



### Total Call Handling Time

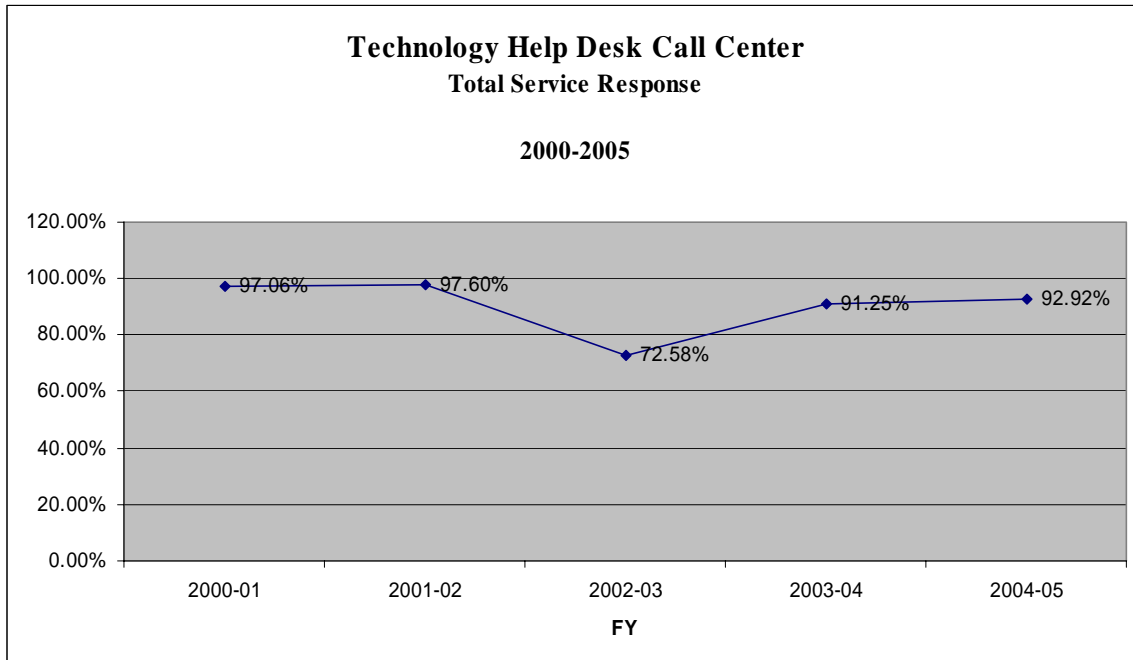
This is a measure of the amount of time it takes our front-line support agents to complete a call with the customer. The clock starts when the call is answered, and continues until the agent is again available to take another call. Our THD has a 2 minute “call wrap-up time” factor so the agents can enter the completed data into the Remedy Work Log included in total call handling time. Overall, we have shown excellent improvements in efficiency over the years at working quickly and resolving cases.





## Service Response

Service Response is an internal component of the Call Center Manager that compiles data regarding all aspects of our call response. There are many components including abandoned calls, speed of answer, call handling time, and many more. It is indicative of the overall effectiveness of the Call Center operation with a typical industry standard of excellence in the 80-85% range. Our THD measurements against the standard has been excellent, except for a brief period in 2002-03 when ITS Telecommunications suffered a configuration failure of the CCM server which reported back inferior statistics. Despite the dip from that failure, the THD has continued to perform at an outstanding rate.



## Technology Help Desk Satisfaction Statistics

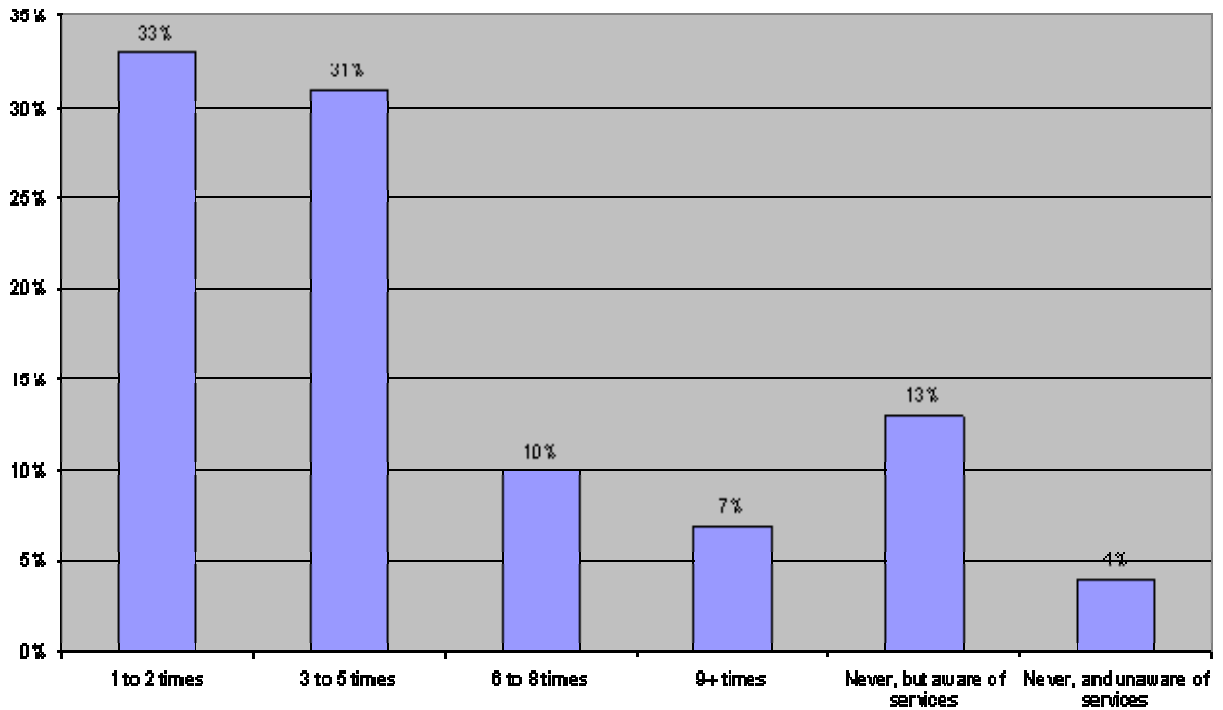
Source: 2005 CSULB Faculty Technology Center Survey, Crista D. Copp

The Technology Help Desk has been the central point of contact for technology support for the past 5 years, and faculty have contacted them 1-2 times (33%) or 3-5 times (31%) in the past year. 7% of faculty have contacted the THD at least 9 times in the past year. Only 4% of faculty are unaware of the Technology Help Desk services.

The mean responses for the THD availability and convenience, responsive and quality of service are 1.63, 1.65, 1.69 with 1 being highly satisfied, an clear indication of the overall perception faculty have of the THD service quality.



### Technology Help Desk – Faculty Contacts



#### THD Availability and Convenience:

85.0% reported satisfied or highly satisfied  
5.6% reported unsatisfied

#### THD Responsiveness

83.5% reported satisfied or highly satisfied  
5.3% reported unsatisfied

#### THD Overall Quality of Service

82.2% reported satisfied or highly satisfied  
6.1% reported unsatisfied

The THD is certainly pleased with these overall results, however, no matter how small the percentage, we will work in the future to reduce unsatisfactory responses down to a negligible amount close to zero.



## Staff Roles and Responsibilities

### **Dan Olsen – Technology Help Desk Manager and Academic Affairs Web Coordinator (ITC – Expert)**

Education: BS, Business Administration, University of Southern California, 1983  
MBA, Business Administration, CSU Long Beach, 1984

#### **Technology Help Desk**

- Overall responsibility for Day to Day operation of the THD
  - Call Center (LA5)
  - Walk-In Service Center (Horn Center)
  - Quality of Service
  - Budget Management
  - Reporting and Statistics
  - Student Staff Recruitment and Training
    - Senior Student Support Representative Development Program
    - Regular SSR's and Federal Work Study Program
  - Staff Management - Thuy Nguyen (ITC Career), Tim Rudolph (ITC Foundation)
- Management Reports
  - Remedy, Call Center Manager (CCM), Internal Logs
- Participate in campus technology organizations and committees
  - Beach CATS, Beach Cert, BeachBoard Team, UITC, 2005/06 CSU CATS Campus Liaison
- Second level technical support for THD
  - Participate in direct customer support as required
- Marketing the THD to the campus community
- Beach Bash Vendor / Campus Vendor Liaison
- Development, Grants and Awards

#### **Division of Academic Affairs**

- Academic Affairs Desktop and Technical Support
  - Staff Management - Andreea Martin (ESS Career), Tim Rudolph (ITC Foundation)
- Web Coordinator – Division of Academic Affairs
  - Template compliance
  - Maintaining ADA compliance
  - Contribute training, administration and support
  - Provost Newsletter
  - Student assistant coordinator for web projects
  - Academic Affairs/Provost Newsletter
- Participate in campus technology organizations and committees
  - WebComm- Charter Member, Academic Web Template Committee



### **Campus Help Tracking System - Remedy**

- System Administration
- Support Remedy use by other campus departments
  - Consulting
  - Training
- Vendor Relations
- Management Reporting

### **Thuy Nguyen – Technology Help Desk (ITC – Career)**

Education: BS, Computer Science, CSU Long Beach, 1999  
MS, Computer Science, CSU Long Beach, 2002

- Support of Day to Day Operations of the THD
  - Student Assistant Coordinator
    - Supervision
    - Time cards
    - Time clock
    - Payroll
    - Scheduling
    - THD staff training
- Second level technical support for Technology Help Desk
  - Participate in direct customer support as required
  - Expert level Mac and PC computer support
- System Administration and Maintenance
  - Exchange Server Administrator
  - Technology Help Desk Server Maintenance
- Participate in campus technology organizations
  - Beach Cats, Beach Cert, others as required
- Data Recovery Services – Expert Level

### **Student Support Representatives**

The THD employs between 14 and 20 Student Support Representatives (student assistants) at any given time who respond to the front-line technical support needs of CSULB faculty, staff and students. The SSR's are valued employees of not only the THD but the University. They are highly trained, very skillful and enjoy helping others. The THD is in a fortunate situation to be able to carefully screen and select candidates from a very large pool of applicants, and makes selections of students who exhibit the following attributes:

- Technical Experience
- Customer Service Ability
- Excellent Communication Skills



- Interest in Helping Others
- Commitment and Desire to be part of a team work environment

THD Student Support Representatives come from all colleges and has an international staff reflective of the diversity of the University. THD management has very high expectations for the performance and retention of our Student Support Representatives provides frequent feedback on performance and recommendations for improvements.

The THD also has an “open-door policy” between the students and management. We are a caring management organization, and recognize that there are many issues that students face in their academic and work careers. The open-door allows them to seek out advice and opinions about these issues, directly work-related or otherwise life-related and offer our experience, expertise and resources to enable them to succeed through any difficulty – without fear of any retribution or other judgment. This program is an effective part of the students’ professional and personal development, and part of a more comprehensive THD management program aimed at high retention rates for our student assistants and career opportunities for them upon graduation from the University.

## **Outlook: Mid to Long-Range Goals**

With the recent reorganization that has placed the THD under the University Library / Academic Affairs Technology Organizations umbrella, we created a planning document entitled “*Technology Help Desk - University Library Collaboration Roadmap, June 2005*” that suggested several ways for the THD to continue to be effective in the future. That document remains at the core of our Mid to Long-Range Goals (1 to 5 years), with minor changes to avoid duplication and add clarity.

### **Direct Reporting Line**

A direct reporting line to the key Academic Technology decision makers of the campus is critical to the future success of the THD. We are clearly at a crossroads, with the THD having reported to the Director of Academic Computing Services, Associate Vice-President of Academic Information Technology, the Vice-Provost, and the Dean of Library Services over the past 2 years. The THD continues to be very successful despite the organizational unrest. Most important for the THD to maintain a very high profile is to have a reporting line to the highest ranking Academic Technology executive possible.

While each campus in our system is organizationally different, the ideal technology organization structure has a Chief Information Officer or Chief Technology Officer reporting directly to the Office of the University President, thereby removing potential divisional bias when it comes to making critical campus technology decisions. CSU Long Beach remains highly decentralized when it comes to campus computing, however the THD is centrally positioned to succeed despite the current organizational limitations and looks forward to a productive working relationship with the Dean of Library Services as responsible for Academic Affairs Technology units.



## **Maintain Autonomous Operations**

The THD presents a highly successful business model with a strong program firmly established, not only on campus but within the CSU system. This has been accomplished with almost no intervention from management throughout the five year history of the organization, and offers the promise of continued growth and success if allowed to proceed in a reasonably autonomous manner.

The successful model described, and the inherent growth and success can be measured in the following established manner:

- Very High customer satisfaction metrics
- Very High internal help desk metrics
- Student Assistant / Student Support Representative Program
- Cross-Divisional Relationships
- Call Center Infrastructure well-established

## **University Library Influence**

The University Library can bring outstanding administrative oversight and management to the THD operation. The THD has suffered somewhat from anonymity, especially in the area of budget and administration, taking on much of the load independently out of necessity. If a balance can be achieved between the existing culture blended with the new, the THD will be well-positioned to thrive in the future.

The THD has gained credibility from being positioned and recognized as a service of Academic Affairs, generally without specific departmental bias. As a centralized organization, conflicts can occur based on divisional priorities – the THD has been effective by setting aside priorities in favor of serving the greater whole.

The THD will continue to provide detailed management reporting quarterly or more frequently as required to the Dean of Library Services.

## **Future Collaboration with Library**

- Integrate library front-line help function to THD
  - Library technical staff retains second-level application support (expert)
- Integrate Remedy call tracking application
- Assist integration of Library applications to campus LDAP standard

## **Future Oriented Planning Issues**

- Staffing – Lowest staff count of any CSU Help Desk
- Remedy – Replace existing system, need campus tech support buy-in
- Service - Determining future Mac support on campus



- Service - Phone identification verification system for password resets
- Collaboration – With UCES for Help Desk services for online students
- Review – THD Mission Statement (APPENDIX K)

### **Other Planning Issues for 2005-06**

- Complete the search and hiring for Tim Rudolph position
- Administrative Details
  - Staff Reviews
  - Staff Salary Reviews
  - Budget
  - General Administration



## **APPENDIX A – THD Proof of Concept (March 2002)**



### **Academic Computing Services - Technology Help Desk Proposal to BATS Committee March 2002**

#### **Proof of the Technology Help Desk Concept**

The THD has effectively addressed some of the early concerns and turned them into opportunity and success. This has been accomplished by specifically addressing after-hours support, support of non-standard systems, applying a personal touch and efficiently working within a constrained budget.

*After-Hours Support* - Through consistent growth, the THD is now meeting the needs of the campus until 10:00PM on Monday through Thursday. This increase in hours follows just one semester after expansion to 7:00PM. It is anticipated that that THD will expand to meet growing after-hours demand in coordination with hybrid and online courses offered through BeachBoard beginning Fall 2002 and likely to include weekend support.

*Non-Standard Systems* – The THD has been extremely receptive and successful in handling support on a very wide range of issues. This is accomplished through a well-trained and deeply knowledgeable staff of student assistants that has built upon its experience to add new applications to our support toolkit. The THD operates as a two-tier Call Center, with student assistants manning the front line and experienced professional staff coaching the front line while handling the escalation of complicated and out of the ordinary issues.

*Application of Personal Touch* – The professional and student staff of the THD are well trained and coached to provide each customer with personal and knowledgeable service. Through established relationships with other support organizations on campus, the THD is well positioned to resolve or escalate any call to the correct location and provide the customer with a “positive referral” when necessary.

*Limited Budget* – As a startup operation attempting to gain a quick footing in a well-established culture, the THD was also in a position that demanded immediate, exceptional and available service. It was imperative that this service be brought to the campus community in a consistent manner. The THD has answered the challenge with Call Center service levels that exceed even the highest standards of private industry.



Operating as one of five functional groups within Academic Computing Services, the THD is very fortunate to have the support and backing of the Director of ACS and the AVP of Academic Information Technology. At the risk of reducing some of its own core services, ACS has kept the THD functional and operating effectively. Additionally, the THD continues to apply for grants and other sources of non-recurring discretionary funding and grants to maintain the high level of service it has established.



## **APPENDIX B – Help Desk Goals 2000-2001**

### **California State University, Long Beach ACS Help Desk Goals – FY 2000-01**

#### **Academic Computing Services / Help Desk Staff**

**Daniel Olsen**, Help Desk Manager

#### **Facility**

Complete the infrastructure build-out of the Help Desk in LA5-363.

- Furniture
- Network Cabling
- Telephone System and Cabling

#### **Remedy**

Maintain and keep current the Remedy Action Request and Help Desk applications for total call management on the Help Desk.

- Ongoing Remedy Training
- Product Customization and Requirements Specification
- Licensing
- Namemaster to Remedy Interface Maintenance
- Continued participation in the CSU Remedy Collaboration (CHATS)

#### **Call Center Management**

Establish policies and procedures for the everyday and ongoing management of the Help Desk.

- Call Management
  - Escalations
  - Notifications
- Interaction with other Support Departments
- Management Reporting
- Oversight of Student Support Representatives on duty

#### **Documentation**

- Help Desk Administration Guide
- Student Support Representative Training Guide
- Maintenance of Help Desk FAQ's



- Maintenance of current available documentation

### **Staffing**

Recruit and hire Student Support Representatives and establish a complete staff of eight.

- Formalize Student Support Representative Orientation, Administration and Training materials.
- Establish formal staff scheduling system for SSR's.
- Coaching

### **Web Presence**

Establish the Help Desk on the CSULB/Academic Computing Services web. The expectation is that this will be more than a simple "presence" on the web and will be built to become a primary destination on campus for computing help and computing resources.

- Web Submission of Tickets
- Web Status Inquiry of Tickets
- Complete current set of FAQ's

### **Publicity**

Use all available avenues to publicize the existence and availability of the Help Desk.

- Faculty and Staff Publications



## **APPENDIX C – Pilot Project Guidelines (April 2000)**

### **California State University, Long Beach Central Help Desk – Pilot Project Guidelines April 2000**

#### **General**

The scope of the Help Desk pilot project is to begin the process of responding to everyday technical support calls from the pilot group.

The pilot is scheduled to run for a period of 3 months beginning Monday, May 1, 2000 and concluding on Monday, July 31, 2000.

Calls will be logged in the Remedy Help Desk application and ticket numbers assigned. Expect some time delay on your initial call to the Help Desk. We will be gathering some demographic data on our callers until such time as an interface to the data is completed.

#### **Objectives**

The primary objective of the pilot project is to resolve the technical support issues that are initiated from the pilot group.

The secondary objective is to put the internal Help Desk tools and procedures through their paces in advance of the general rollout. The areas that will be closely analyzed include:

- Remedy Help Desk
  - Data Entry
  - Form Flow
  - Appropriateness of CSULB Data Setup
  - System Response Time
- General Help Desk
  - Assess Types of Incoming Calls
  - Build Support Knowledge Base

#### **Support**

Please review the attached “Help Desk – Supported Applications” document for a detailed listing of what the Help Desk can provide assistance with.

The Help Desk is presently recruiting qualified students to fill our openings as Student Support Representatives. Early callers can expect to work directly with the Help Desk Manager until the student staff is established and trained.

#### **Contacting the Help Desk**



During the pilot project, the following options are available for contacting the Help Desk:

Telephone – On-campus dial 5-4959 or off-campus dial 562-985-4959

Email – Send Email to [helpdesk@csulb.edu](mailto:helpdesk@csulb.edu)

The general hours of operation are 8:00am to 5:00pm, Monday through Friday. Callers to the Help Desk are advised to leave a detailed Voice Mail message in the event your call cannot be answered directly. You will receive a return call as soon as possible thereafter.

### **Feedback**

Feedback on the pilot project is critical to our success. Your comments and input are welcome at any time by emailing or calling Dan Olsen at [dolsen2@csulb.edu](mailto:dolsen2@csulb.edu) or 5-5855.

Thank you in advance for your participation in this pilot.



## **APPENDIX D – Progress Report (April 2000)**

### **California State University, Long Beach ACS Help Desk Progress Report – April 19, 2000**

The following is an update on the CSU Long Beach Help Desk development as of April 19, 2000. This represents the middle of the 11<sup>th</sup> week of development on the project.

#### **Help Desk Facility**

- Help Desk Physical Layout Completed
  - Optimized to have open area for Student Support Representatives
  - Vendor is WC Services, Jim Banta
- CSULB Facilities Coordination
  - Electricity Requirements Completed
  - Carpet Selected and Ordered
  - Paint Selected and Ordered
- Networks Services and Telecommunications Coordination
  - Network and Telephony Cabling Requirements Completed
  - Coordination with Facilities on shared electrical conduit
  - ACD Requirements Defined and System Ordered
- Additional Hardware Ordered
  - 3 PC's to complete the projected requirements for the Help Desk

#### **Remedy**

- Software is Functional
  - Action Request and Help Desk Software Installed
  - Client Software Installed – 2 pc's
  - Help Desk App up and running with minimal functionality
  - Help Desk App up and running with only minor customizations
  - Extensive configuration of CSULB definitions
    - Region/Site/Department
    - Category/Type/Item
- Interface to NameMaster database specification written
  - Required to reasonably enter calls into Remedy
  - Used to populate predefined fields in Remedy
  - Used to authenticate users



- Training Sessions at Remedy
  - AR Administrator
  - Help Desk Administrator
  
- Participant on the CSU Remedy Collaboration Panel

### **Help Desk Support**

- Support Activity
  - Answering all Help Desk calls to 5-4959
  - Answering all Help requests via email to [acsinfo@csulb.edu](mailto:acsinfo@csulb.edu)
  - Positive responses generated
  - On schedule for Pilot Program beginning 4/24/2000
  
- Supported Applications Defined
  
- Recruiting Help Desk Student Support Representatives
  - Career Development Center
  - Flyers Posted LA5, College of Business
  - Add to ACS Web Page
  
- Requested [helpdesk@csulb.edu](mailto:helpdesk@csulb.edu) alias to be reserved for the Help Desk

### **Support Documentation**

- Existing Documentation
  - Gathering and Organizing Current
  
- Help Desk Administration Guide
  - Student Support Representative Training Manual
  
- Help Desk Web Development (Supportal)
  - FAQs
  - Web Support Access
  - Help Desk Statistics
  - Scheduled to meet with Doug Cox, Campus Webmaster



## **APPENDIX E – Accomplishments 2001-2002**



### **Technology Help Desk THD Accomplishments for 2001-02 June 28, 2002**

- Successfully opened the THD Walk-In Service Center in the NCC. Primary activities there include: Create/Reset CSULB Internet Account, BeachBoard Support, ACS Software Distribution.
- Successfully upgraded Remedy to new hardware and latest software versions. Remedy ARS from 4.03 to 5.01, Oracle 8.04 to 9i, foundation for deployment of Remedy Web Based client.
- Successfully added new THD supported applications in the Call Center including BeachBoard, XanEdu, CMS-Peoplesoft HR and FIS, and Norton Anti-Virus. Selected to be front-line support for CMS-Peoplesoft Student Administration application.
- Won CSULB Alumni Association Grant to install and maintain Information Kiosks in the NCC.
- Won BATS allocation of \$90,000 in support of the ongoing THD concept.
- Successfully hired our first systems support person to specifically perform face to face desktop support for end users of the Office of the Provost, Academic Affairs and University Academic Programs.
- Successfully participated in over 60 SOAR workshops to create and distribute CSULB Internet Accounts to over 6000 incoming CSULB students.
- Successfully organized and conducted 11 BeachBoard Student Support Sessions in Spring 2002 attended by over 200 students.
- Participated in regular monthly meetings with Network Services staff on relevant campus computing issues resulting in greater THD access to the systems we need to be effective.
- Significantly increased THD call volume, case volume and unique web traffic from 2000-01 to 2001-02. (Supporting data to follow)



## APPENDIX F – THD Planning 2002-2003



### Technology Help Desk

#### THD Planning 2002-03 for ACS Retreat June 28, 2002

#### Projects and Goals for THD Call Center and Walk-In Service Center

*(there is a fine line between projects and goals in our environment!)*

- Combine Student Staff of Call Center and WISC (*Project*)
  - Add ACD phone to WISC
  - Plan for adding hours in the WISC to match the NCC for Fall 2002
  - Alter plan for closing the Call Center in the evening
  - Training for student assistants in preparation to work in both locations
  - Training for Andreea to compliment THD staff in WISC
  - Centralize administration of THD student assistants
    - Student Assistant Hiring Process
      - New Hire Paperwork
      - Work Study
    - Scheduling
    - Time Reporting
- High Availability of Services (*Goal*)
  - Continue excellent call answer statistics
  - Additional open hours
  - Appropriate staffing levels
- Communication with Tech Support Organizations on Campus (*Goal*)
  - Publish and Maintain Master Listing
  - Campus wide notification of tech issues
  - THD cannot handle all issues – not one stop shop
  - Network Services / THD customer confusion – think we are the same
- Remedy Expansion (*Project*)
  - Target college techs for Remedy
  - Target other administrative support to use Remedy – Student Services
  - Ongoing Training of existing users
  - Report training
  - Web client deployment
- Ongoing Training (*Project*)



- CMS Technical Training for FIS and HR
- CMS Training for Student Administration Module
- BeachBoard Training (extensive)
- XanEdu Training
- Student Assistant Training
- Staff Training Opportunities
  
- Documentation (*Project*)
  - Possibly hire student assistant as Technical Writer
  - Complete Student Assistant Training manual
    - For Call Center
    - For Walk-In Service Center
  - Website Content
  - Process Documentation – Student Assistants
  
- Software Distribution (*Project*)
  - Migrate software burning responsibility to THD
  - Organize plan regarding the toaster
  - Presently there are delays
  
- Remote Control for Remote Support (*Project*)
  - Network Services uses SMS for Anti-virus and CMS
  - Student Services piloting SMS
  
- Student Training Workshops (*Goal*)
  - Conduct workshops for students on a regular basis
  
- Expanded THD (*Goal*)
  - More hands on support in WISC
  - Go out into the field – desktop support
  - Data Recovery service
  - Role in campus wireless configuration
  - BeachBoard Organizations – Summer 2002
  
- Deploy NCC Information Kiosks (*Project*)
  - Purchase flat panel monitors
  - Stands – figure out what to do
  - Have computers in hand – may need wireless or other network connection
  - Create the visual
  - Plan to update on a daily basis using WISC talent
  - Coordinate with University Art Museum and other ACS for updates



## APPENDIX G – THD Profile 2002-2003



### California State University, Long Beach Technology Help Desk Profile – 2002-03

#### Contact Information

Telephone: 562-985-4959  
Email: [helpdesk@csulb.edu](mailto:helpdesk@csulb.edu)  
Walk-In: North Campus Center Lobby  
Web: <http://helpdesk.csulb.edu>

THD Manager: Dan Olsen  
Telephone: 562-985-5855  
Email: [olsen@csulb.edu](mailto:olsen@csulb.edu)

#### Hours of Operation

The THD is open for telephone, email and walk-in support on the following in-semester schedule:

Monday - Thursday: 8:00 a.m. to 11:30 p.m.  
Friday: 8:00 a.m. to 5:00 p.m.  
Saturday: 9:00 a.m. to 5:00 p.m.  
Sunday: 1:00 p.m. to 5:00 p.m.

#### Services

Technology Help Desk services are available to all CSULB faculty, staff, and students with a valid campus email account for assistance with a wide range of desktop computing issues. Our support representatives are available to answer questions and provide support on the following computing topics and many more:

- [CSULB Internet Accounts](#)
- [Internet Services](#)
  - Browser Configuration
  - Webpage Development
  - [CSULB Remote Access](#)
  - [CSULB Email](#)
  - [Webmail](#)
- [BeachBoard](#)
  - [Faculty Support](#)



- [Student Support](#)
- [Organizations](#)
- Instructional Technologies: [XanEdu](#), Turnitin
- Windows OS, Microsoft Office and CSU/Microsoft Select Agreement Software
- Mac OS
- [Anti-Virus](#)
- Campus Licensed Software Distribution for Faculty and Staff
- CMS / Peoplesoft Applications
  - Financial Information Systems
  - Human Resources Information Systems
  - Student Administration (coming soon)
  - Portal (coming soon)

### **Staff Information**

The THD operates as a functional group under the Academic Computing Services department. The full-time staff of 3 includes Dan Olsen, Manager; Thuy Nguyen, IT Consultant; and Sarah Budd, Administration.

The front-line technical support is provided by a dedicated and well-trained team of 16 Student Assistants and augmented during peak periods by 6 Federal Work Study Student Assistants. The THD also serves as an excellent professional work experience for all student staff members and, as such, is rewarded with low turnover and high achievement. It is this continuity of staff that allows the THD to be in full production during peak and non-peak times

### **Scope and Guidelines**

THD Staff and Student Assistants provide support exclusively by telephone, email, web and walk-in at THD locations. THD Staff and Student Assistants are not authorized to provide field support. Customers are referred to their appropriate college, division or department technicians by the THD as required and based on relationships developed across the campus. Case escalation to these other support departments are made using a combination of the Remedy Help Desk Application, email, and telephone depending on the requirements and licensing of the specific support department or technician.

The THD is designed to support CSULB faculty, staff and students who have a current CSULB Internet Account. Customers without evidence of a valid campus account are treated as “guests” of the University and may be eligible to receive limited support on a low priority basis.

### **Remedy**

The THD and Academic Computing Services maintain the Remedy Help Desk hardware and software for use by campus technology support personnel and departments as follows: Remedy Action Request System 5.00.01, Remedy Help Desk 5.0, Oracle 9i,



Windows 2000 operating environment. The system is widely utilized by technical support departments and personnel on campus including: Network Services (Desktop Support Services and BeachBoard), Student Services (all division technicians), CMS Subject Matter Experts and Coordinators (FIS, HRIS), ACS Instructional Technology Group (BeachBoard, XanEdu, Turnitin) in addition to the THD.



## APPENDIX H – CSU Survey of Exemplary Technology Programs 2003



### Technology Help Desk California State University, Long Beach

CSU Survey of Exemplary Technology Programs or Projects  
Submitted to CSU Chancellors Office - January 2003

**Campus:** California State University, Long Beach

**Name of program/project:** Technology Help Desk (THD)

**Responsible faculty members(s) and/or administrator(s) for contact:**  
Daniel Olsen, Technology Help Desk Manager

**Email address of contact person:** olsen@csulb.edu

**Phone of contact person:** 562-985-5855

**Program/project URL:** <http://helpdesk.csulb.edu>

#### **What are the educational objectives that drive this program/project?**

The THD directly supports the faculty, staff and students involved in the teaching and learning process. As evidenced by the explosive growth of the campus learning management system BeachBoard, technology is now firmly integrated into instruction and the need for support for this and other complementary applications is critical.

#### **Briefly describe the program/project (please limit to 150 words or less):**

The Technology Help Desk was formed as a department of Academic Computing Services in August 2000. The THD provides a single point of contact for the University community on wide variety of computing issues including CSULB Internet Accounts (Email), Academic Technologies (BeachBoard) and University distributed software applications (Windows, Microsoft Office, Mac OS). Additionally, to ensure that the service is widely available, customers may contact the THD using the following methods: telephone, email, website, and walk-in.

The THD model at CSU Long Beach has proven itself to be highly scalable. As evidence, the THD has experienced steady growth from the first day of operations.



Starting with 2 full-time staff members, 3 student assistants and operating 5 days (45 hours per week), the THD fielded 359 cases the first month. Through continued outreach to the campus, adding operating hours and by adding key supported applications including BeachBoard and CMS in a controlled manner, significant growth has been achieved while maintaining several constants. The THD now operates with 2.5 full-time staff members, 16 student assistants and operating 7 days (83 hours per week), servicing a total number of inbound contacts of 13,450.

### **What outcomes were expected from the program/project?**

The original plans for a campus help desk specifically targeted three specific areas to be measured for success. They are:

1. Central Service – Customers call one number
2. Call Tracking System – All cases are logged and tracked
3. Serve Faculty – Faculty will be the gauge of success

The THD has met and exceeded each of these objectives. The service is widely known on campus through a comprehensive outreach program and there remains little confusion as to the primary source of technical support on campus. The THD operates and maintains the campus Remedy system for tracking and assigning cases and has added several support groups to the system for ease of transferring cases to the appropriate support group. Finally, the THD serves not only the faculty, but has evolved to bring support to all staff and students creating an extremely valuable service to the campus.

### **Who are the beneficiaries of this program/project and what benefits do they derive?**

The entire campus community are the beneficiaries of this valuable program.

#### General – All Benefit

- Reduced wait time to resolve routine software assistance issues
- Technological barriers to the teaching learning process are reduced

#### Faculty

- Specific support for BeachBoard and other Academic Technologies
- Direct students to the THD rather than resolve issues themselves

#### Staff

- Technical support staff are freed to work on complex or hardware issues
- Remedy allows ease of communication between technical support groups

#### Students

- Convenient and available service when they need it most
- Specific support of BeachBoard and other Academic Technologies

### **What has contributed to this program/project's success?**



The success of the THD can be evaluated at two levels as follows:

### General

The primary qualifier for the success of a technical support program or organization is providing consistent, high-quality and high-availability services. From the day the THD opened its' doors and phones for business, quality of service has been the hallmark of the operation. It starts with the THD process for evaluating, hiring and training Student Support Representatives (Student Assistants) that ensures only the most qualified applicants are hired. Through extensive and ongoing training on the commitment to customer service and THD supported applications, the THD continues to reliably meet these stated objectives.

### Growth

Initially, the THD's success was directly related to outreach – pounding the pavement. The THD was promoted by distributing literature and through speaking engagements at dozens of campus functions. Future success and growth has been achieved through collaboration with numerous campus technical support groups including Network Services, Student Services, Instructional Technology, CMS Financials and Human Resources. By using a common call tracking system (Remedy), the THD is able to effectively work with the varied support groups on campus resulting in a single point of contact to the campus community. Finally, by controlling the addition of key campus applications, the THD is able to achieve high growth in a managed environment.

### **Has anything inhibited the success of this program/project, and if so, what?**

As a campus that is over 50 years old and has traditionally operated in a decentralized manner, it can be difficult to get people to accept a new way of doing business. Additionally, budgets continue to be allocated in much the same way as always, without consideration for the value of centralized services.

That being said, the THD has been willing to win converts in bunches or one at a time if necessary through a commitment to high quality service and availability.



## APPENDIX I – THD Staff Training Agenda – Fall 2005



### THD Staff Training Day – Fall 2005

August 25, 2005  
8:30AM – 5:00PM

*“Emphasizing the importance of the whole and the interdependence of its parts”*

- Welcome (8:30am) - Dan
  - THD Update –
    - The THD as part of the “Holistic University”
    - THD History
    - Organization Structure – THD and the University Library
    - Quality of Service
    - Confidentiality of Information
      - Confidentiality Release Forms
    - Review of Summer 2005
      - SOAR
      - My CSULB and TIM
      - BeachBoard Stability Project
  - THD Staff Info and Roles
    - Dan Olsen
    - Thuy Nguyen
    - Andreea Martin
    - Tim Rudolph
  - THD Student Support Representative Update
    - Graduates
    - Other Attrition
    - Focused Roles
    - New Hires!
      - Introducing our returning and new staff
    - Current Hiring
    - Performance Evaluations
    - Roles and Responsibilities
      - THD Administration Guide



- Network Services (10:00-10:50) – Jesse Santana, Matt Black, Eric Ham  
*Special Guest: Dr. Wayne Dick*
  - Updates on major campus systems from the system administrators
    - TIM
    - CSULB Internet Accounts / Webmail / Namemaster
    - New Stuff – WebAdapt2Me
    - Web Accessibility using Windows
- Enrollment Services / My CSULB (11:00-11:50) – Nancie Mack, Janice Miller, Michael Leikam
  - Updates on My CSULB
    - Enrollment Self Service
    - Financial Aid Self Service
    - Portal

*LUNCH – Student Union Food Court – Carls Jr., Subway, El Pollo Loco*

(Help out in call center if you have extra time – no phones, just deal with email)

- BeachBoard Update (1:15-2:50) – Patrick Crispen
  - Updates on BeachBoard for Fall
  - Procedures for Working with the FTC
- Review of Call Center and WISC Procedures (3:00-3:50) Tim, Thuy, Dan, Travis
  - Call Center Operations –
    - Telephone and ACD Procedures
      - Logging into the ACD
      - Monitoring the Queue
      - Checking THD Voice Mail
    - Inbound Email Procedures
      - Emails to the Work Log
      - Monitoring the Email Queue
      - Email Signatures
  - Walk-In Service Center Operations
    - For All Services – Must show CSULB ID
    - Call Center Phone Responsibility
      - Walk-ups take priority
    - Primary Responsibilities
      - CSULB Internet Account Creation – initial the white ticket
      - CSULB Internet Account Password Resets – see above
      - Namemaster
        - Problem Accounts
        - Namemaster authorization changes
      - ACS Software Distribution



- BeachBoard Support
- Greet Everyone you can who enters the building
  
- Remedy (4:00-4:20) - Dan
  - System Navigation and Use
    - Users not in Remedy
    - Guest Account
    - Mandatory Fields
  - Case assignments
    - Working with other support organizations
      - Network Services
      - CMS
      - NS-LDAP/TIM
      - Faculty Technology Center
      - Others
  
- Reminders for Fall (4:20-4:30) - Group
  - Never give a wrong answer. Never.
  - New ID Cards - Required for ALL THD services
  - Campus ID Numbers
  
- THD Administration (about 4:30) – Thuy, Dan
  - Fall Staff Schedule
    - Problem Resolution

***Group Meeting – New FWS Students***

- Open Forum – Your Questions and Our Answers
- Final Thoughts

END OF SESSION / END OF SUMMER



## APPENDIX J – Proposal to Bats Committee (March 2005)



### Technology Help Desk Proposal to BATS Committee March 2005

#### Amount Requested - \$92,500

The Technology Help Desk (THD) operated by the Division of Academic Affairs is requesting permanent funding for baseline operating expenses related to student assistants of \$92,500.

The history and success of the THD has strong ties to the BATS committee. The help desk concept was first identified in the CSULB "Baseline" Hardware/Software Access, User Training and Support Plan dated January 31, 1997 and was reviewed by the BATS committee during FY1998-99. This resulted in startup funding for the Help Desk as a "proof of concept" project for FY1999-2000. In FY2001-02, BATS provided new startup funding for the THD Walk-In Service Center located in the NCC/Horn Center. In in FY2002-03, FY2003-04 and FY2004-05 BATS provided necessary funding to the THD to offset the cost of Student Assistants and expand operating hours to meet the growing technology needs of the students, faculty and staff. Funding provided by the BATS Committee is an essential element of the THD's ongoing operation.

From its opening in Fall 2000, the THD has shown steady growth in each year of operation. This growth is accomplished through supporting new applications, supporting new departments and inherently through the expansion of campus teaching and learning tools including BeachBoard and MyCSULB. All front line support is handled by 14 part-time Student Assistants serving as Student Support Representatives. They are experienced (nearly 100% retention rate) and perform in a manner reflective of our values: viewing the University in a holistic manner, high availability, getting the answer right, treating all customers in a professional manner, and providing a positive referral if necessary. Their effort is supported by 1 full-time staff member and the Manager who serves as second level support as well as managing the administrative, outreach and day-to-day operations. THD supported applications cross all campus Divisions and include:

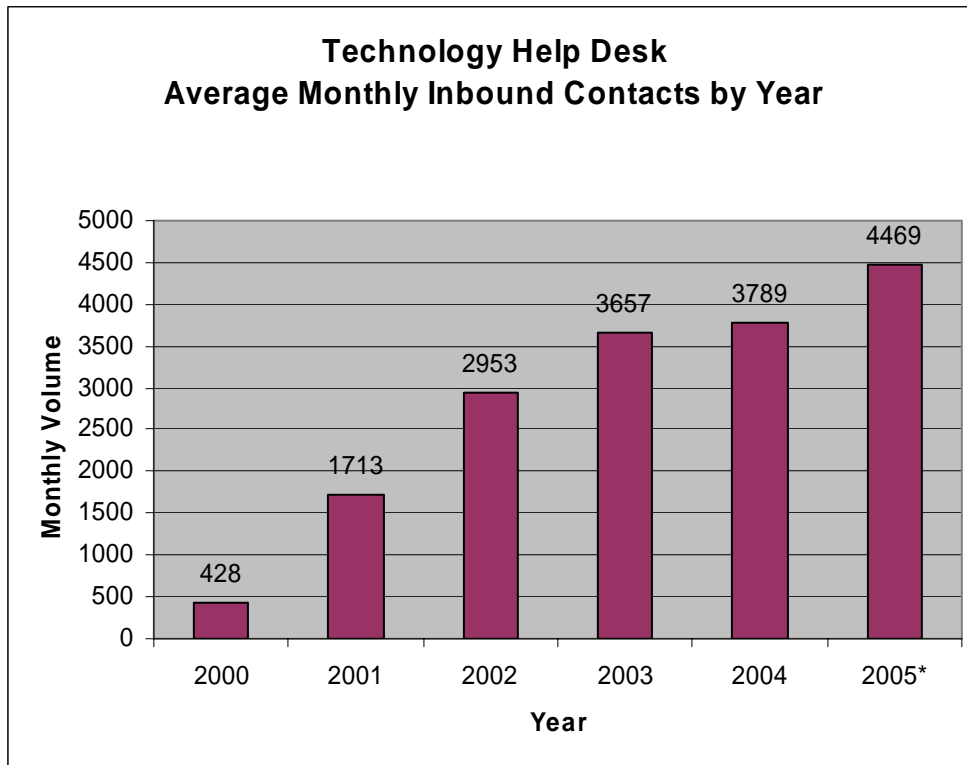
- My CSULB
- BeachBoard
- CSULB Webmail/Email Accounts
- TIM
- CMS / PeopleSoft
- Anti-Virus
- Windows and Mac OS



The THD is the exclusive provider of high-availability front-line technology support for students who now are required to use campus mission critical websites and tools including BeachBoard and My CSULB on a daily basis. The THD is clearly established as core baseline service and is the central point of contact on campus for technology and computer support for students, faculty and staff.

This request for permanent baseline funding of \$92,500 follows the pattern set by and furthers the work of the original BATS allocation by making possible the human resources necessary to operate the THD.

(See attached growth graph)



\*2005 Data based on YTD results ending February 2005



## APPENDIX K – THD Mission Statement **\*\*NOT APPROVED\*\***



# Technology Help Desk

## Technology Help Desk Mission Statement

**\*\*NOT APPROVED\*\***

*(Working Version 12/8/2001)*

The CSULB Technology Help Desk mission is to be the central point of contact for the CSULB campus community on any computing or technology related issue. The THD will accomplish this with outstanding customer service and integrity of operations, and do so in a consistent and professional manner. All services will consider and be offered in cooperation with the local technology support organizations on campus. Through the delivery of this essential service, instructors will have fewer technical barriers to being excellent teachers, staff will have access to the tools and support required to be efficient administrators and students will understand that CSULB is an institution where technology is integral with education.

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### ***Contact Information:***

***Daniel Olsen***

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***[www.csulb.edu/helpdesk](http://www.csulb.edu/helpdesk)***