Texas Education Agency

TSDS INCIDENT MANAGEMENT SYSTEM (TIMS)

User Guide

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June 2, 2014

Contents

Introduction

The Texas Student Data System (TSDS) Incident Management System, or TIMS, is a web-based system that allows you to submit incidents when you encounter problems, have questions about TSDS applications, or want to request software enhancements. If the support staff at the next level cannot resolve your incident, it can be escalated to the next level, from the local educational agency (LEA), up to the education service center (ESC), and if necessary to the Texas Education Agency (TEA).

Support staff at the LEA, ESC, and TEA who are tracking the requests are provided with a dashboard-like view of the latest activity on incidents, assigned incidents, and lists of incidents by various categories.

Audience

This user guide is broken into sections as follows:

- **Introduction:** for all users of TIMS, to provide background on capabilities, roles, and workflow
- **Using the Basic Features of TIMS:** for TSDS nonsupport users of TIMS, to introduce them to the software and assist them with its basic features
- **Managing Incidents in Support View:** for support users, to help them understand how to use their views and track and manage incidents
- **Working with the Knowledge Base:** for Level 3 support users, to manage Knowledge Base articles

Features

TIMS has the following features:

- Incident reporting and management
- Incident escalation
- A knowledge base
- History tracking
- Subscriptions service for receiving information about specific updates or changes

User Levels and Roles

Five levels of users can access TIMS via the secure TEA Login (TEAL). Your views of TIMS and permissions vary depending upon your user level:

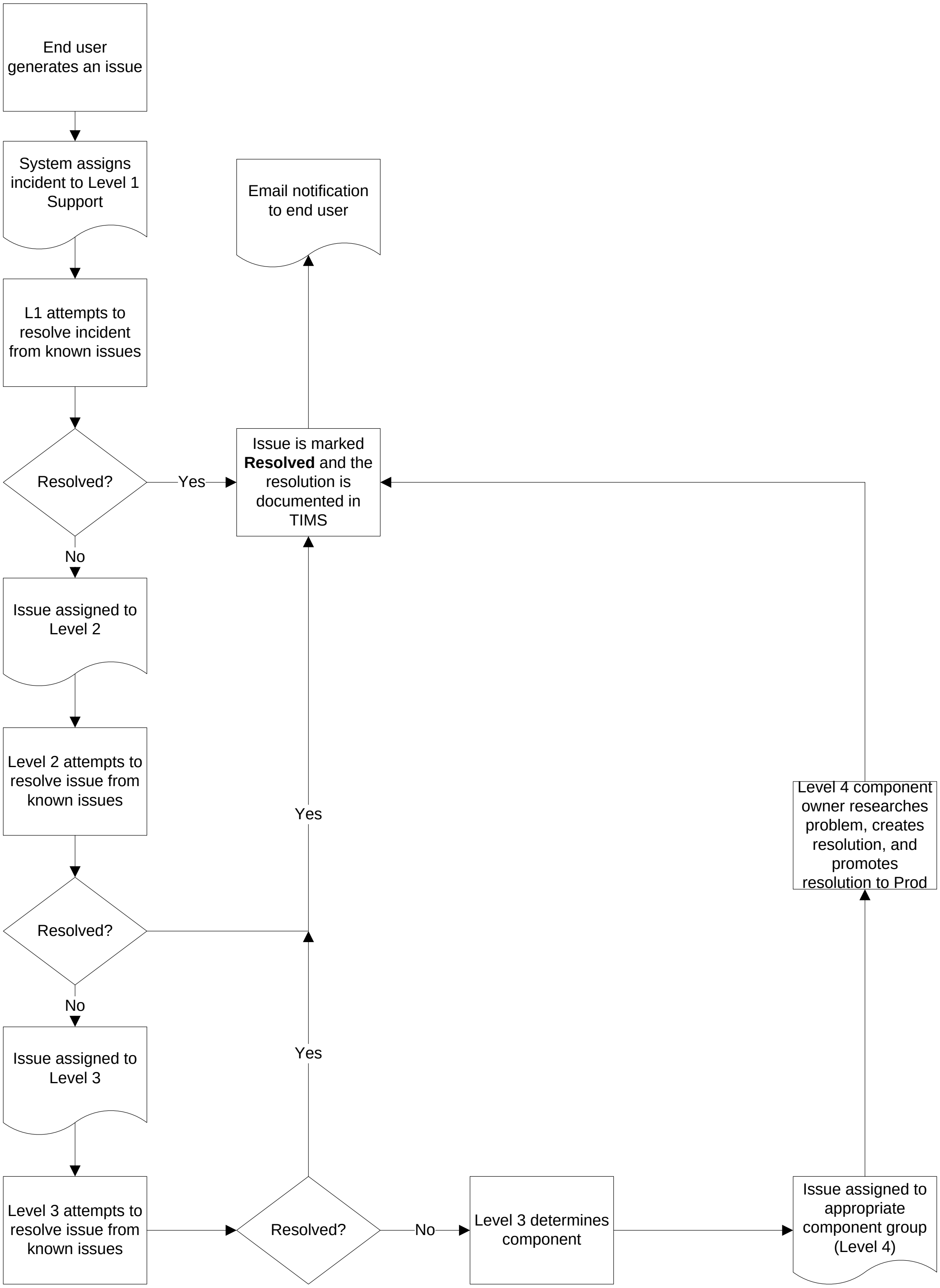
Level	TEAL Role/Description	Description/Privileges
TSDS User	Any user with a role in one or more of the TSDS Portal and applications, for example: • Unique-ID LEA • ODS Data Loader • Dashboards User	• Searches Knowledge Base for help • Submits incidents, questions, and requests for enhancements to TIMS • Views own incidents
Level 1 Support	TIMS LEA Support The first contacts for questions by district or charter school users, who work with internal district source data experts to diagnose and resolve incidents	• Searches Knowledge Base for help • Monitors and manages the TIMS Level 1 queue • Resolves incidents • Escalates incidents to Level 2 Support when necessary • Enters incidents in TIMS
Level 2 Support	TIMS ESC Support Support personnel at the ESC who monitor and receive escalated incidents from Level 1 Support, assist in the diagnosis of data anomalies, and help diagnose problems	• Searches Knowledge Base for help • Monitors and manages incidents in TIMS for LEAS in district for whom they provide support • Escalates incidents to Level 3 Support when necessary • Writes articles for the Knowledge Base • Enters incidents in TIMS
Level 3 Support	System Support Support staff at TEA who monitor and receive escalated incidents from Level 2 Support staff and assist in diagnosing, resolving, or escalating incidents This is a TSDS system-wide role and so includes functionality related in all TSDS applications—not specific to TIMS.	• Searches Knowledge Base for help • Monitors and manages incidents in TIMS that have been escalated to Level 3 • Escalates incidents to Level 4 Support when necessary • Writes or approves articles written by others for the Knowledge Base • Closes incidents that are resolved at Levels 1 and 2 • Enters incidents in TIMS
Level 4 Support	Any of several roles held by TSDS Component owners (technical experts for the various applications)	• Searches Knowledge Base for help • Monitors and manages incidents in TIMS for the specific component for which they provide support • Enters incidents in TIMS

FERPA and Use of Data in TIMS

It is **very important** to follow stringent guidelines when using LEA and ESC data in TIMS. TEA policy and the Federal Educational Rights and Privacy Act (FERPA) dictate that personally identifying data for students and teachers be kept private. Therefore, the following rules are applicable to all users of TIMS:

- Data will be used for the sole purpose of resolving the reported incident, and no attempt will be made to identify specific individuals.
- If the identity of any student should be inadvertently discovered, no use will be made of this information nor will it be shared by anyone else, and the identifying information will be safeguarded or destroyed.
- Only the personnel providing support for the incident will have access to the contents of the data files, including any files derived from these files.
- Inquiries from the LEA regarding compliance with this agreement or the expected date of resolution of an incident must be responded to promptly and in writing.
- All electronic and paper files containing identifying data that are created or used during incident resolution must be destroyed when the incident is closed.

Simplified Workflow for TIMS



Using the Basic Features of TIMS

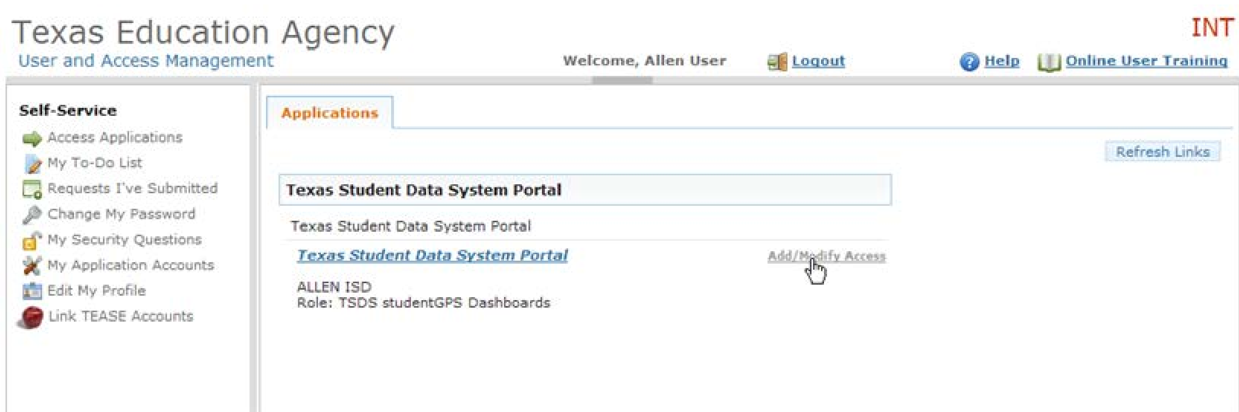
This section of the user guide is designed for end users of TSDS applications so that they can learn the basic features of TIMS:

- Accessing TIMS
- Searching the Knowledge Base
- Filing an incident report
- Viewing your personal incident reports

Getting Access to TIMS

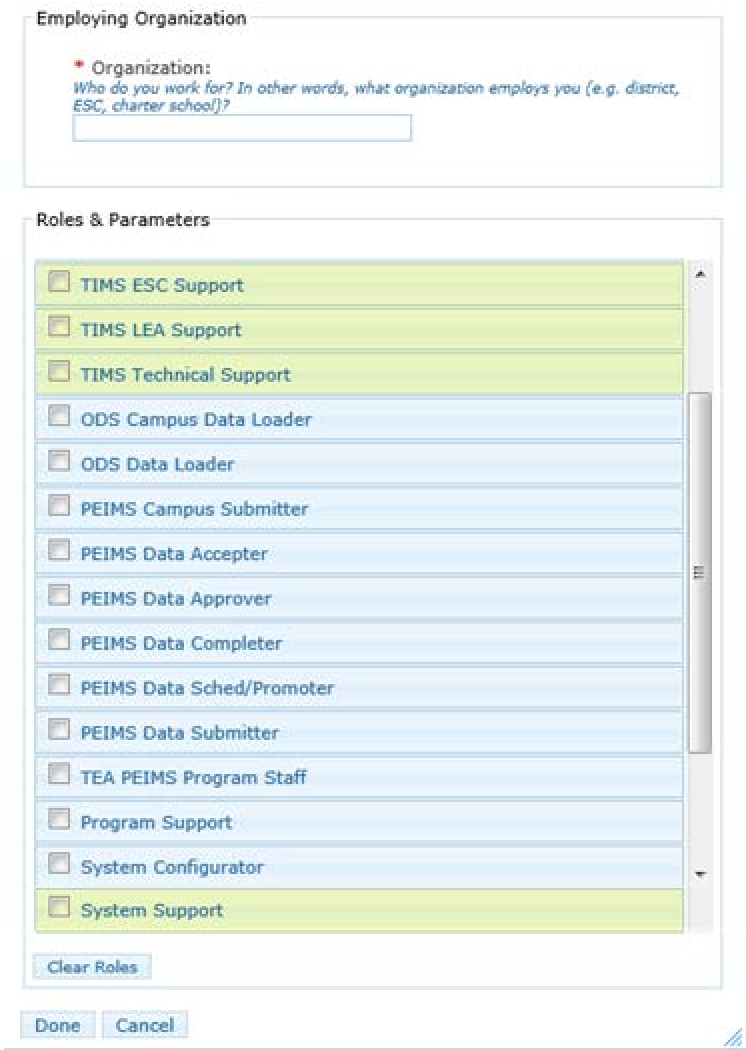
If you are already a TSDS user, you have a TEAL login that gives you access to TIMS. If you need a specific support role (TIMS LEA Support, TIMS ESC Support, System Support, or TIMS Technical Support) because you are part of the LEA, ESC, or TEA support team, you may request that additional access through TEAL

Log in to TEAL, and click **Add/Modify Access** next to your TSDS application link.



Click **Add Access** on the next page, and then complete the form to request the new role for TIMS. See the TEAL Help for any questions.

> **Note:** If you are not a TIMS support person, requesting any TSDS role will give you access to the basic functionality of TIMS. You will be able to view the Knowledge Base, submit incidents, and look at your own incidents.

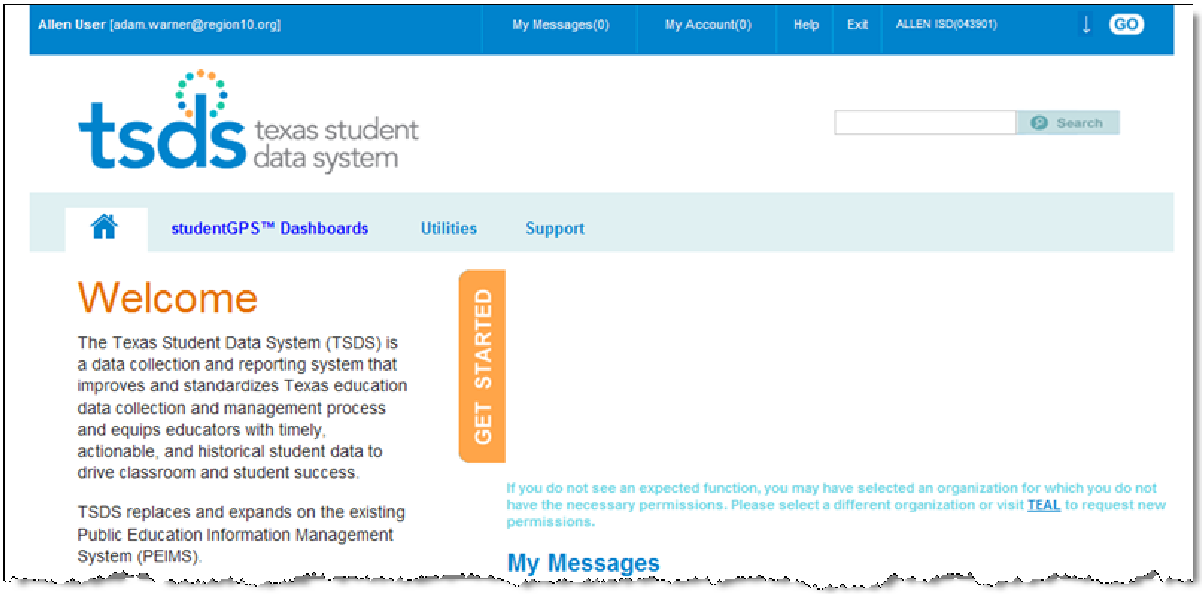


The TIMS support roles are detailed in User Levels and Roles.

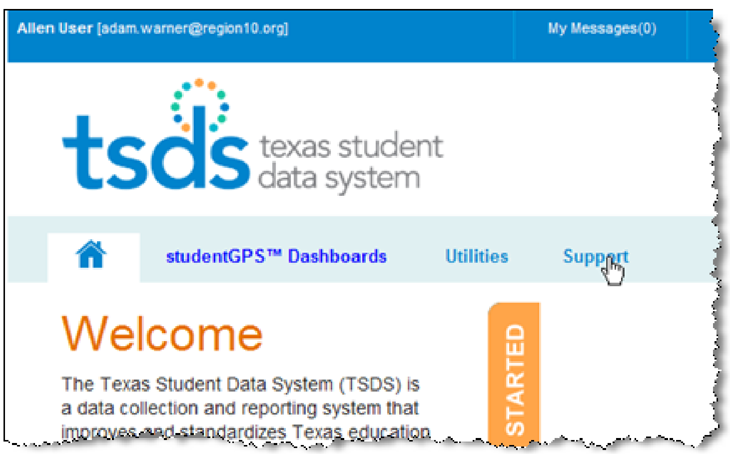
Accessing TIMS

If you are a district or charter school user and need help with a TSDS application or utility, then you are most likely already logged in to TSDS. However, if you are not, follow these steps to access TIMS:

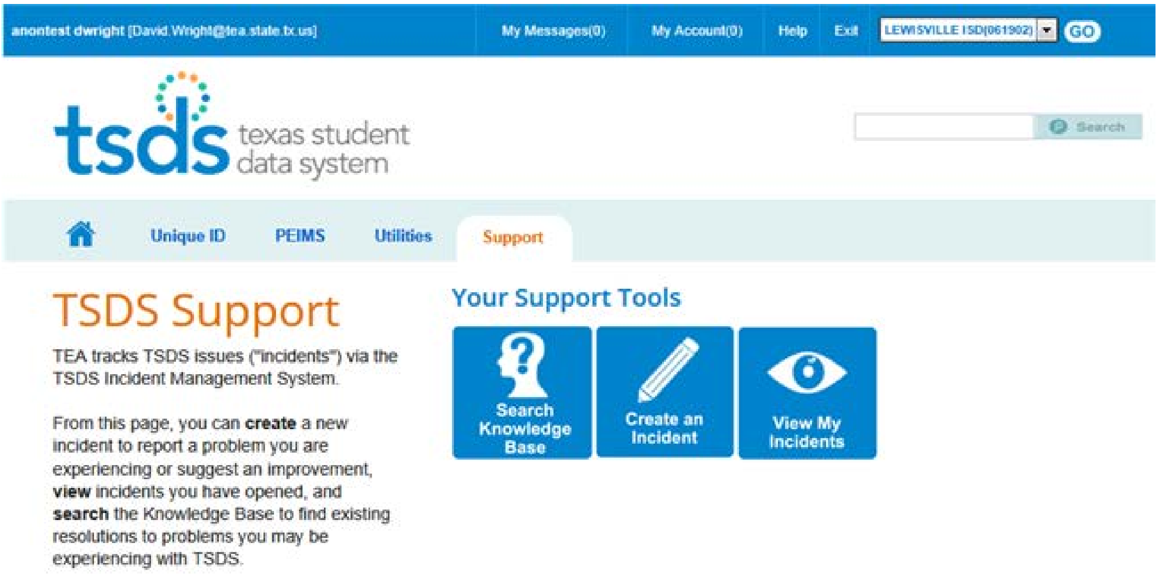
1. Log in TEAL and access the TSDS Portal. This portal may look slightly different from the example below depending upon which TSDS functions you have access to:



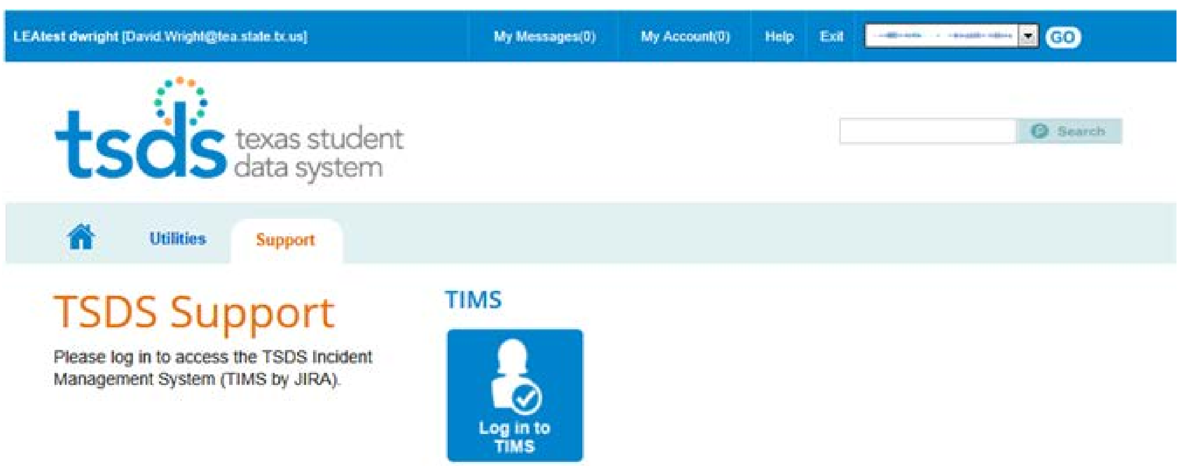
2. Click **Support** on the light blue menu:



The TSDS Support Portal page appears. The following example is for users who are not support staff:



Users providing support see a page that looks like this:



Searching the Knowledge Base

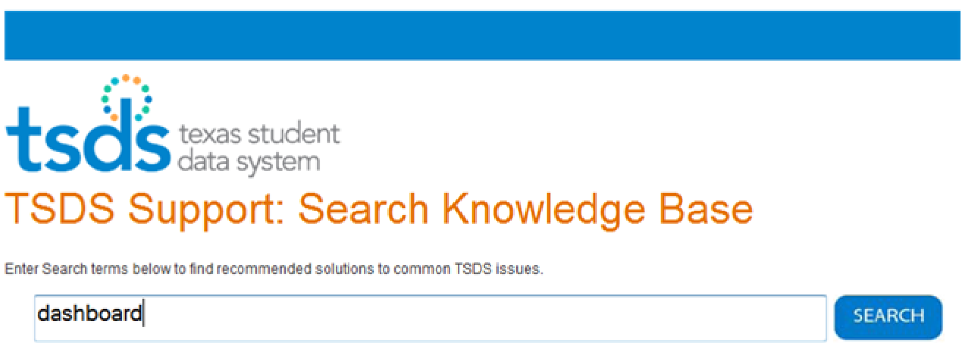
The first activity you should perform when you have difficulty using any TSDS application is to search the Knowledge Base for assistance.

Follow these steps to search the Knowledge Base:

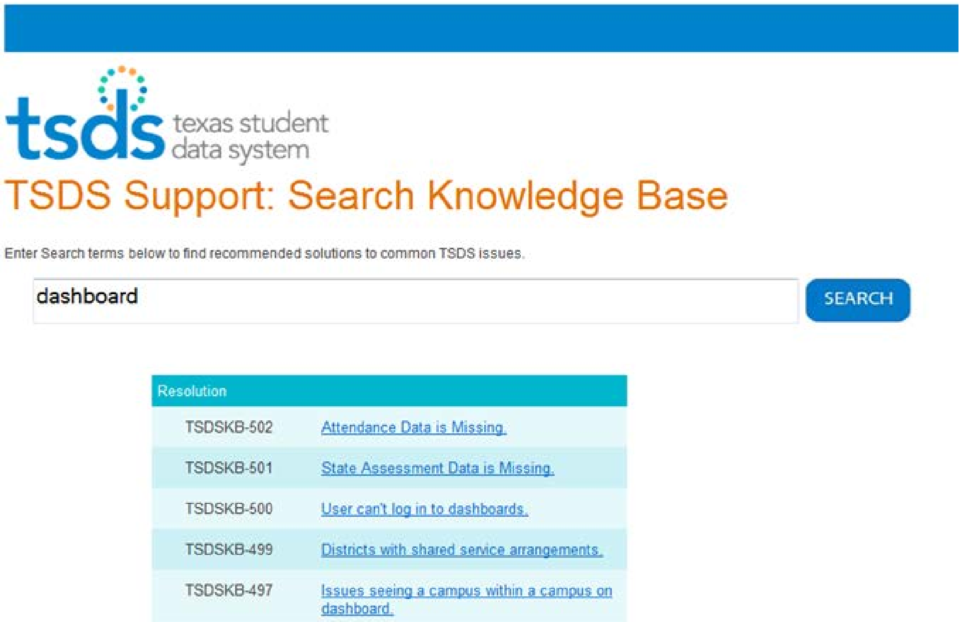
1. Click **Search Knowledge Base:**

A search field opens allowing you to type your question or a description of your problem:

2. Type your question or some keywords:

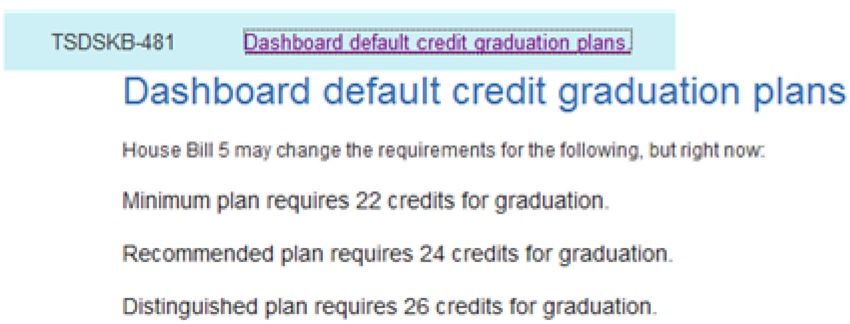


3. Click **Search.**



A list of results appears.

4. Click the link for a result to view it. Information entered for the incident into the Knowledge Base appears:



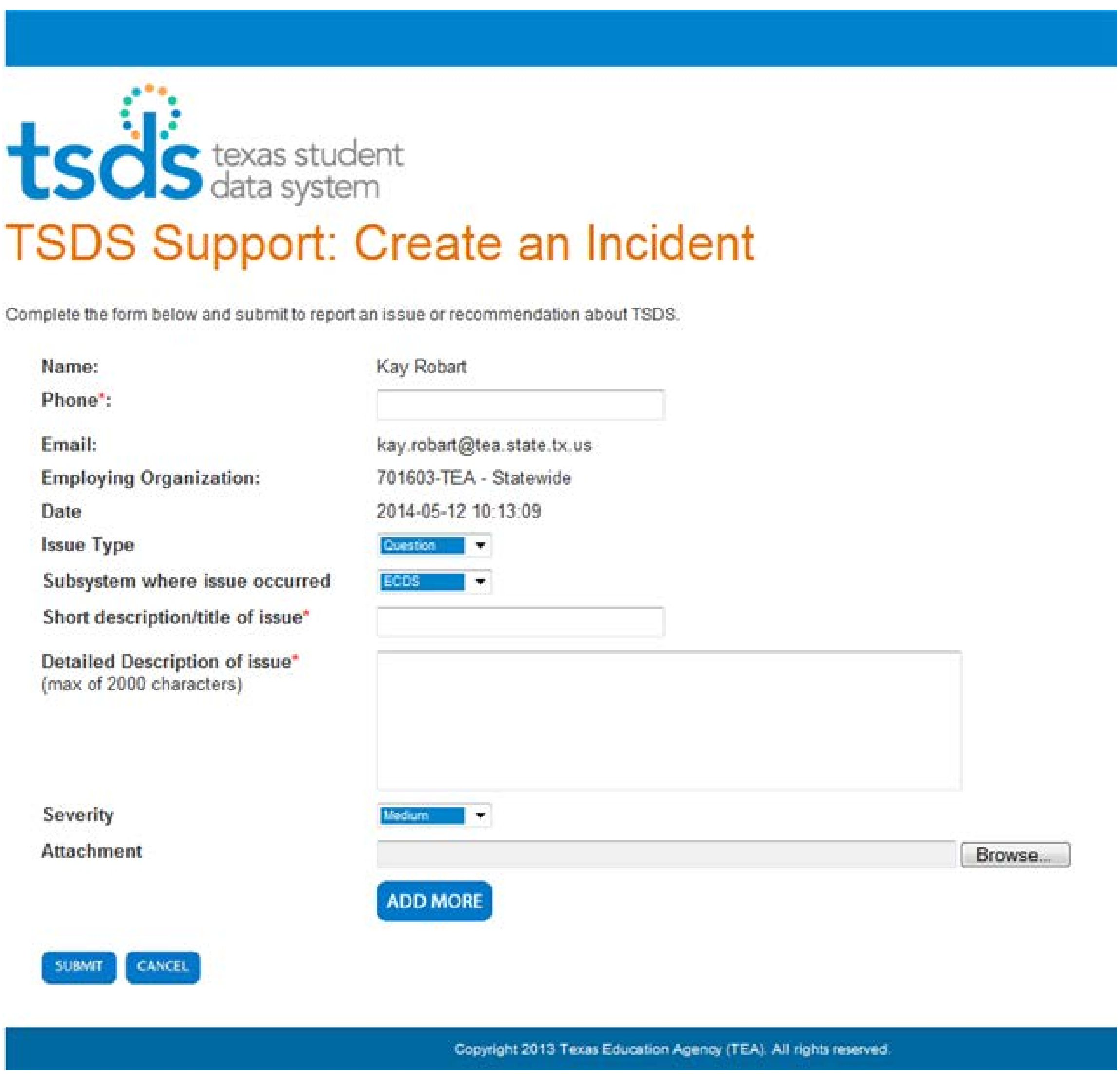
If your search of the Knowledge Base returns no results, try modifying your search criteria. If you are unable to find anything to help you with your problem, submit an incident report.

Submitting an Incident Report

If searching the Knowledge Base did not help to resolve the incident or answer your question, you can create an incident in TIMS. Follow these steps to create and submit an incident report:

1. From the TSDS Support page, click **Create an Incident.**

The form for an incident report opens, with some information about you and your organization already completed. As you can see, the user name and address is already populated. Required fields are indicated by a red asterisk.



2. Type a phone number where you can be reached, including the area code, in the following format: ###-###-####.

3. Select an **Issue Type** from the drop-down menu.
   - **Question:** to ask the support team a question
   - **Enhancement Request:** to request an enhancement to an application
   - **Problem:** to report a problem with the software
   - **User Request:** to request something besides an enhancement or help with a problem from support
4. Select the name of the subsystem where the problem occurred.
5. Type a short description of the incident.
6. Type a detailed description of the incident. If you are describing a problem, this description should contain enough information so that the respondent can figure out what you were doing when the problem occurred, including the steps you took just before the problem.

> **Important:** Do not include personal identifying information such as names, social security numbers, student or employee IDs, DOB, addresses, etc., in the ticket **Short description/title** field. You *may* include personal information in the **Detailed description** field or within attachments, as long as it is necessary to solve the incident.

> **Examples:** Here are a couple of examples of well-written detailed descriptions.
>
> Teacher06 does not teach Geometry, World or otherwise. However, the last three classes listed on his drop down menu show that he has three World Geometry classes.
>
> There are 15,634 Course Offering records being discarded and 35,737 section records being dropped because the education Org calendar file is empty. Please inform vendor that this file needs to be re-sent with the correct data.

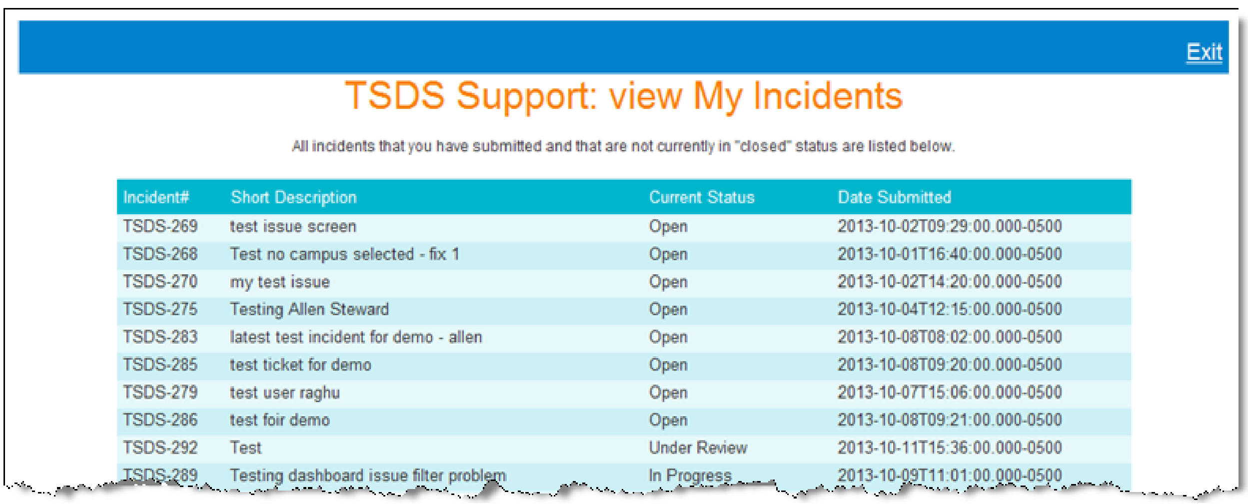
7. Select the severity of the problem:
   - **Low:** you are submitting a question, asking for an enhancement in functionality, or having problems with the display or formatting of information.
   - **Medium:** the application works but produces incorrect, incomplete, or inconsistent results, or the problem impairs usability.
   - **High:** a problem with specific application functionality is causing a major impact on your work.
   - **Critical:** you are unable to do your work because of a system failure.
8. If there is an attachment that will help with an understanding of the problem, for example, a spreadsheet of the data you are trying to import or a screen capture of the error message, use the **Browse** button to locate the file on your computer and attach it.

9. Click **Submit.**

Viewing Your Personal Incident Reports

If you have submitted one or more incident reports and wish to view them, click **View My Incidents.**

The system lists the incidents you filed:


Exit

TSDS Support: view My Incidents

All incidents that you have submitted and that are not currently in "closed" status are listed below.

Incident#	Short Description	Current Status	Date Submitted
TSDS-269	test issue screen	Open	2013-10-02T09:29:00.000-0500
TSDS-268	Test no campus selected - fix 1	Open	2013-10-01T16:40:00.000-0500
TSDS-270	my test issue	Open	2013-10-02T14:20:00.000-0500
TSDS-275	Testing Allen Steward	Open	2013-10-04T12:15:00.000-0500
TSDS-283	latest test incident for demo - allen	Open	2013-10-08T08:02:00.000-0500
TSDS-285	test ticket for demo	Open	2013-10-08T09:20:00.000-0500
TSDS-279	test user raghu	Open	2013-10-07T15:06:00.000-0500
TSDS-286	test foir demo	Open	2013-10-08T09:21:00.000-0500
TSDS-292	Test	Under Review	2013-10-11T15:36:00.000-0500
TSDS-289	Testing dashboard issue filter problem	In Progress	2013-10-09T11:01:00.000-0500

The **Current Status** column lists the status of the incident as follows. See User Levels and Roles for more information on the support levels.

Current Status	Description	Level To Set Status	Level Assigned
Open	The incident is open and ready for the assignee to start work on it.		Level 1
In Progress	The incident is being actively worked on by the assignee in Level 1.	Level 1	Level 1
Hold for Customer	More information is needed from the initiator of the problem or the end user before progress can continue.	Level 1	Customer
Level 2 Incoming	The incident has been referred to Level 2 ESC Support	Level 1	Level 2
Level 3 Incoming	The incident has been referred to Level 3 TEA TSDS Support	Level 2	Level 3

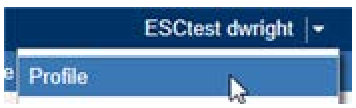
Level 4 Incoming	The incident has been referred to Level 4 TSDS Component Owner	Level 3	Level 4
Level 4 In Progress	The incident is currently being worked on by Level 4 support.	Level 4	Level 4
Level 3 In Progress	The incident is currently being worked on by Level 3 support.	Level 3	Level 3
Level 2 In Progress	The incident is currently being worked on by Level 2 support.	Level 2	Level 2
Level 1 Followup	The incident has been returned to Level 1 for follow-up.	Level 2 or 3	Level 1
Level 2 Followup	The incident has been returned to Level 2 for follow-up.	Level 3	Level 2
Level 3 Followup	The incident has been returned to Level 3 for follow-up	Level 4	Level 3
Level 2 Hold	The ESC support team needs more information or other feedback from the initiator or end user or needs some other resolution before progress can continue.	Level 2	Level 2
Level 3 Hold	The TEA TSDS support team needs more information or other feedback from the initiator or end user or needs some other resolution before progress can continue.	Level 3	Level 3
Level 4 Hold	The TSDS Component Owner needs more information or other feedback from the initiator or end user or needs some other resolution before progress can continue.	Level 4	Level 4
Under Review	The incident is being evaluated for completeness and a possible Knowledge Base article.	Level 3	Level 3
Resolved	A resolution has been entered and the incident is awaiting verification by Level 3 support. From this status, incidents are either reopened or closed by Level 3.	All levels	Level 3
Reopened	The incident was once resolved, but the resolution was deemed incorrect. From this status, incidents are either marked **Open** or **Resolved.**	All levels	Level 1
Closed	The incident is considered complete. A resolution has been found and it has been verified.	Level 3	
Posted	A Knowledge Base article has been reviewed and posted.	Level 3	

Subscribing to Incident Updates

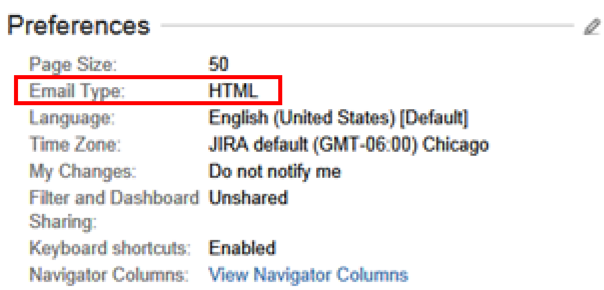
You can set up TIMS to send you scheduled email updates for specific incidents or issues. This process consists of three steps: checking your email type, setting up a filter, and subscribing:

Check email Type

1. First, you must confirm that your email type is set to HTML. Click the arrow next to your name at the top right of the page and select **Profile:**

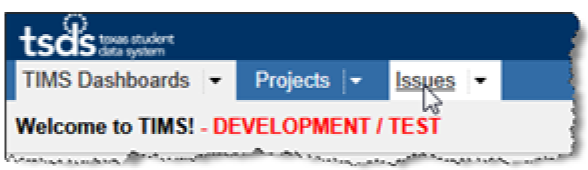


2. Under **Preferences**, check that the **Email Type** is set to **HTML.**

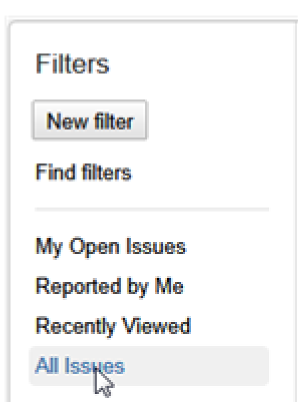


Setting Up a Filter

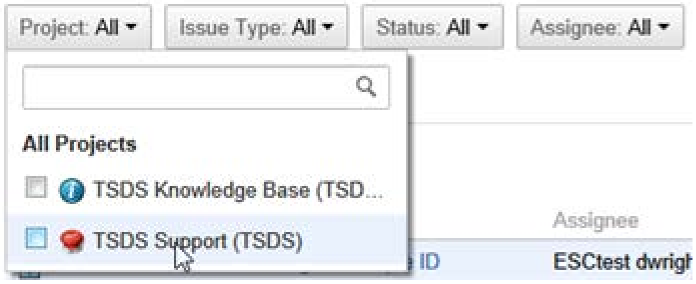
1. Click the word **Issues** in the top menu:



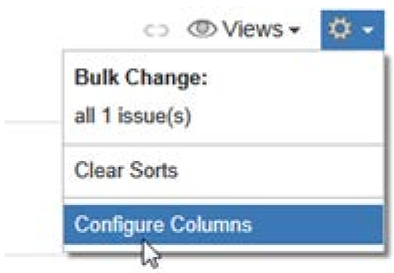
2. Click **All Issues** under **Filters:**



3. Choose **Project > TSDS Support:**

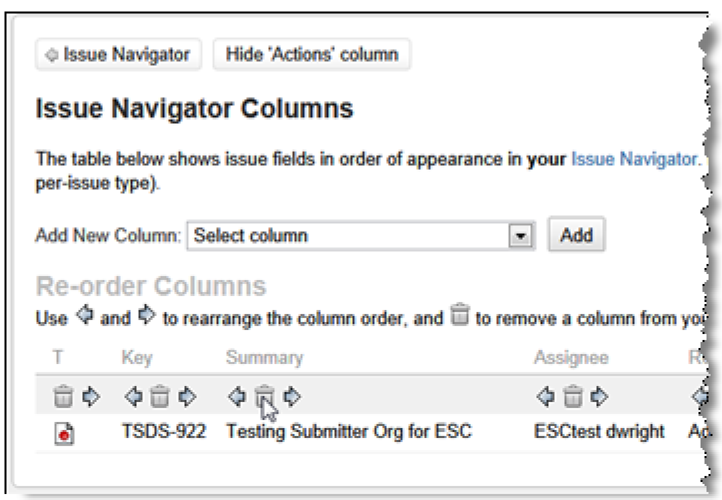


4. For **Issue Type,** choose the applicable issue type.
5. For **Assignee,** click the applicable assignee.
6. If you want to include more criteria, for example, all incidents from a particular ISD, click **More Criteria** and select the criteria.
7. Select the arrow next to the gear icon and select **Configure Columns:**



> **Important:** It is very important that you complete this and the following step to limit the view of the data in accordance with FERPA.

8. Click the trash can icon above **Summary** to remove the summary:

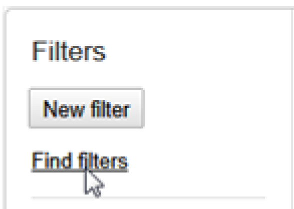


9. Click **Issue Navigator** to return to the filter.

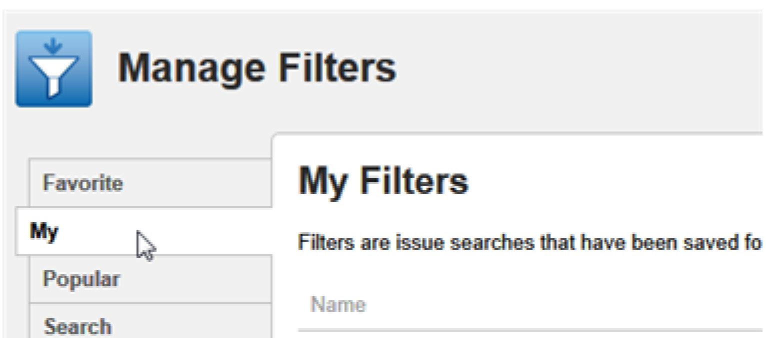
10. Ensure that the Summary Column is not present in the filter.
11. Click **Save as** and give the filter a name.

Subscribe

1. Click **Find filters.**

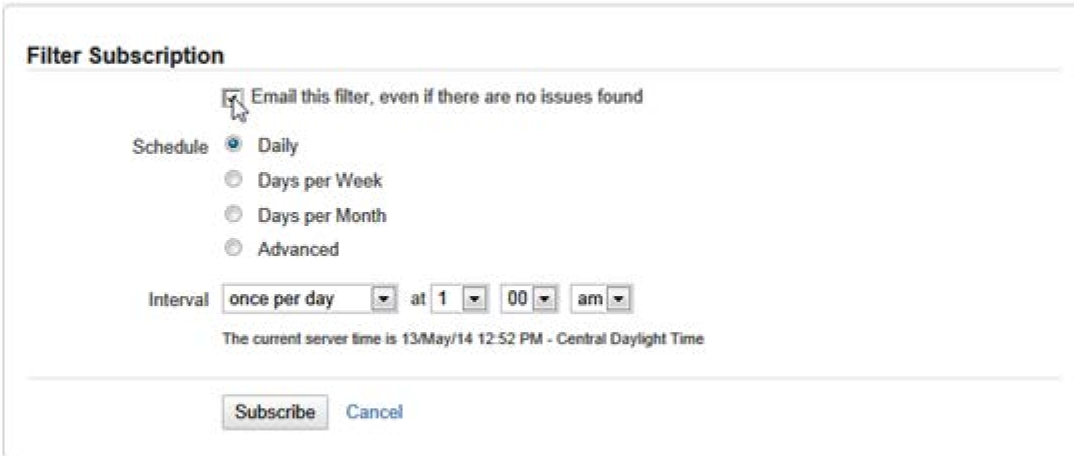


2. Click **My.**



3. Next to the filter you saved, click **Subscribe.**

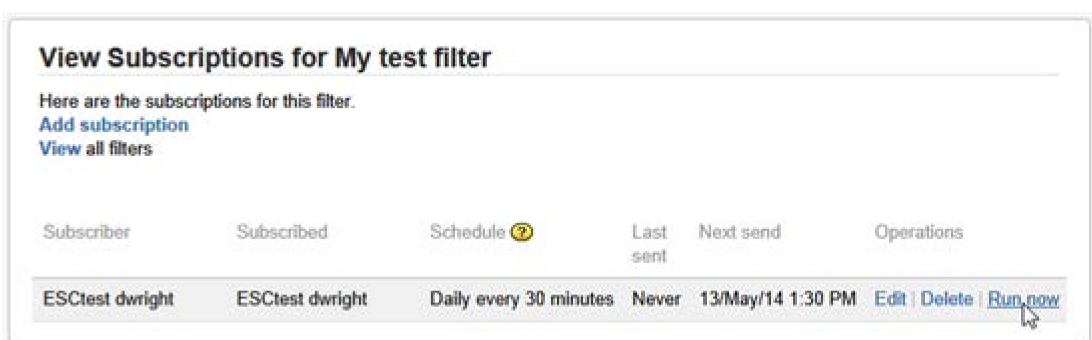
4. Click **Email this filter.**



5. For **Schedule,** choose from the options. The selections under **Interval** change depending upon what you pick for **Schedule.**

   - **Daily:** sends an update daily at the time or times specified.
   - **Days per Week:** provides a selection of the days of the week.
   - **Days per Month:** allows you to select a specific day of the month or specify a specific week and day (for example, first Sunday of the month).
   - **Advanced:** allows you to type an interval in as a Cron expression. We recommend you pick one of the other options.

6. For **Interval**, select appropriate options. For example, if you picked **Daily,** you might select **Every thirty minutes** and a time range.
7. Click **Subscribe.**
8. Back in the view of your filter, click **Run now** to start the subscription:



You can use the links under **Operations** to delete the subscription or edit it.

Managing Incidents in Support Views

The support views of the software are similar for all levels. This section of the user guide is designed to help support staff understand their views of TIMS and complete tasks so that they can help their users. If a feature is not available to a level, that is mentioned in the section explaining the feature.

Accessing TIMS

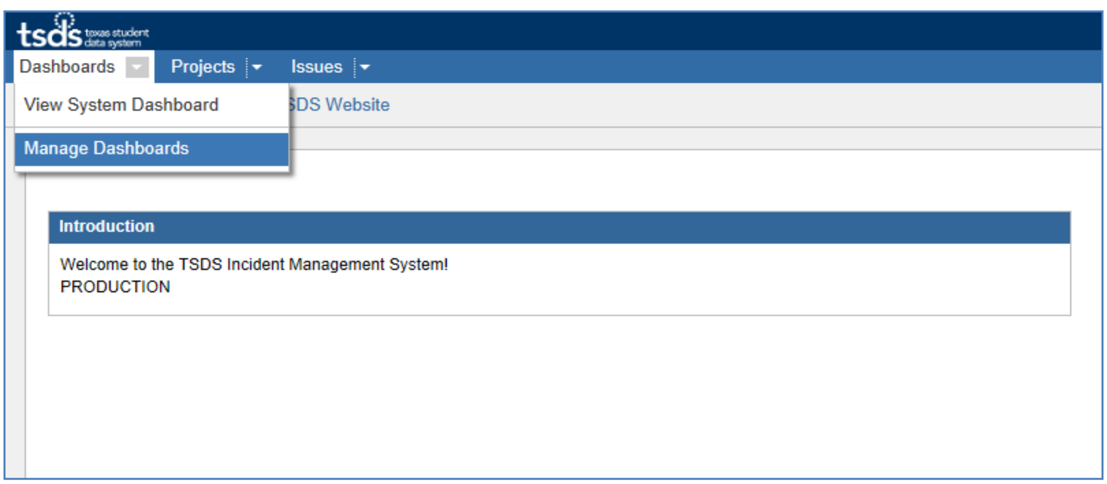
Access TIMS by logging into TSDS through TEAL.

1. On the TSDS Portal, click **Support.**
2. Click **Log in to TIMS.**

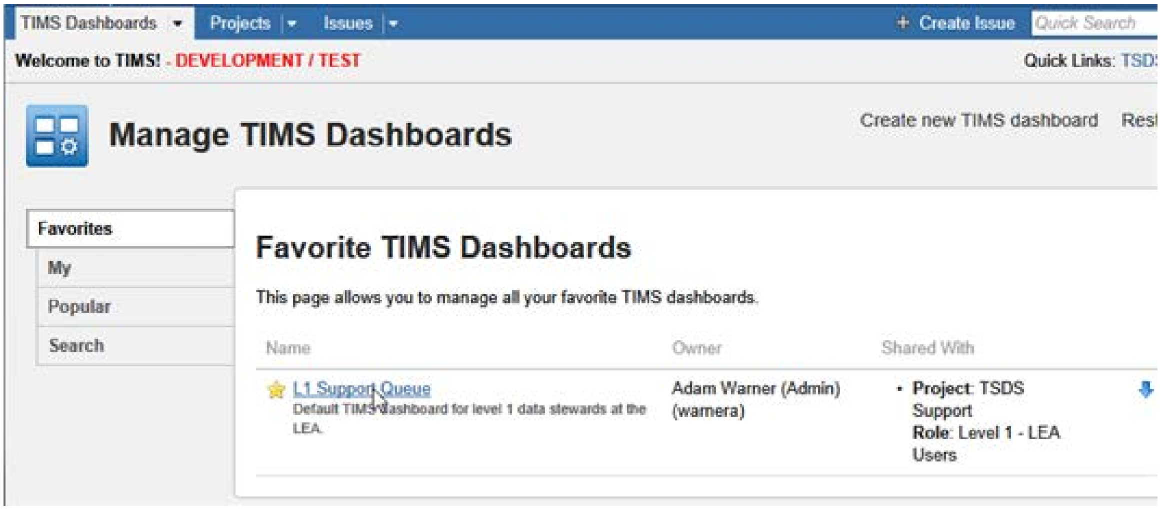
The TIMS Dashboard appears. It needs some setup before you can continue. Pre-formatted dashboards are available for every view, but you must select them.

Performing an Initial Setup

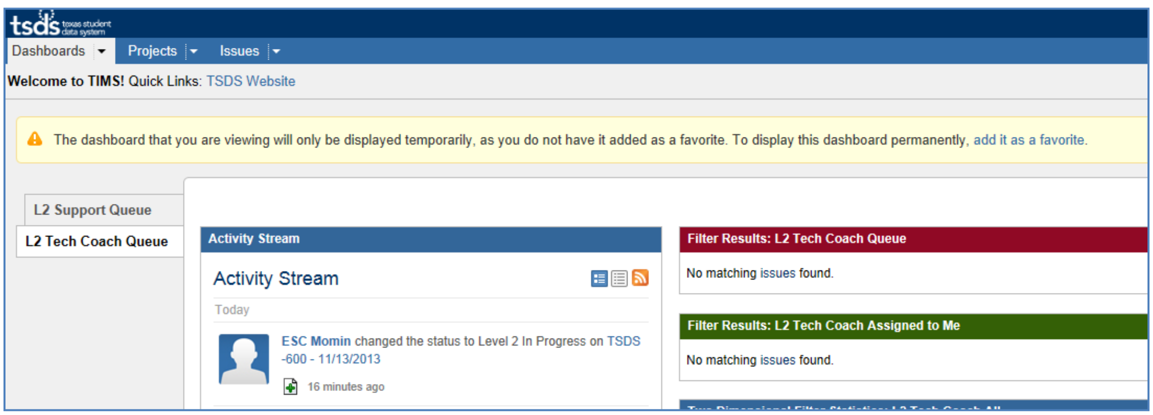
1. From the Dashboards menu, select **Manage Dashboards:**



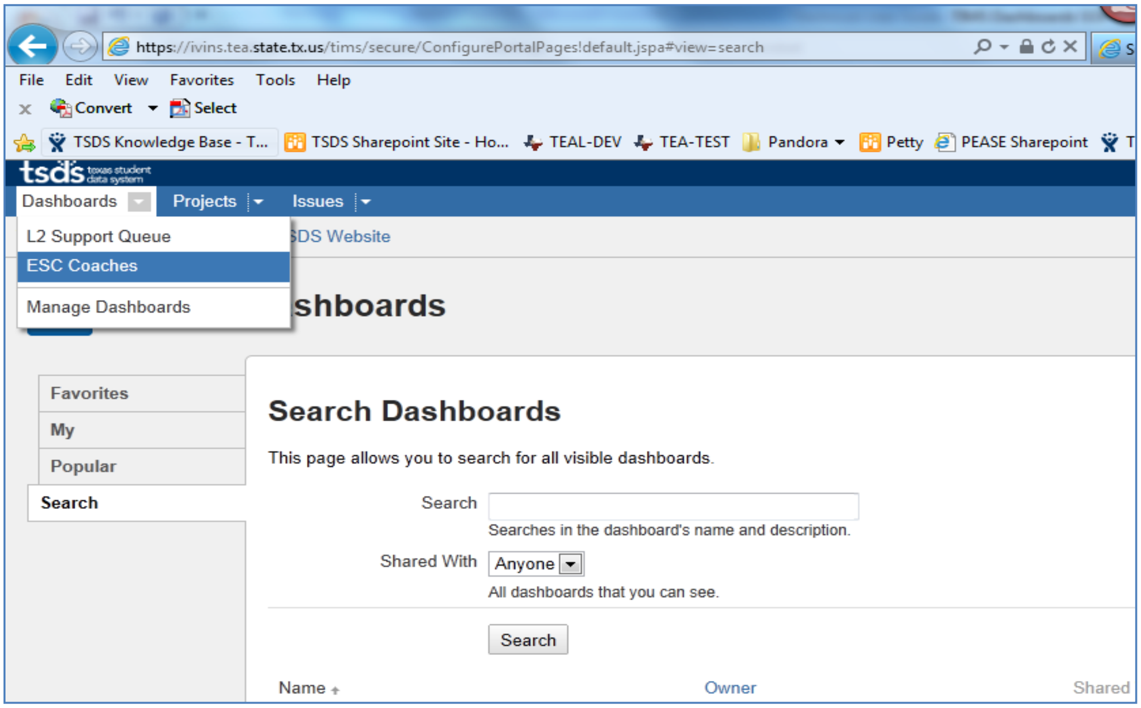
2. Click the link for the dashboard that corresponds to your support role level. (LEAs select **L1 Support Queue,** ESCs select **L2 Support Queue,** and so on.)



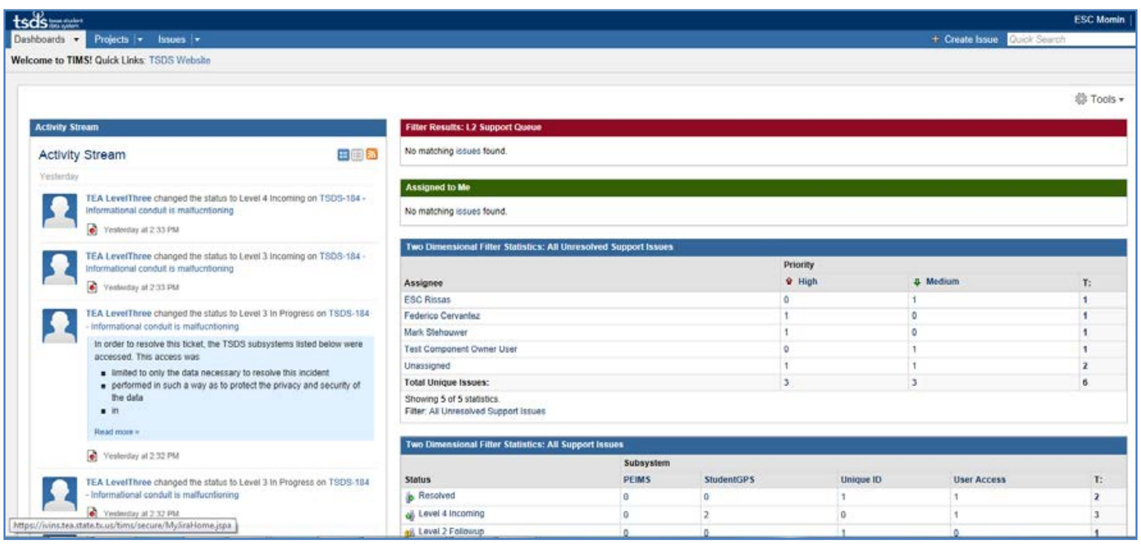
3. The dashboard appears, but you must set it as a favorite to select it permanently. In the message at the top of the page, click **add it as a favorite.**



4. To choose your dashboard again, select it from the **Dashboards** menu. Thereafter, it will come up automatically.

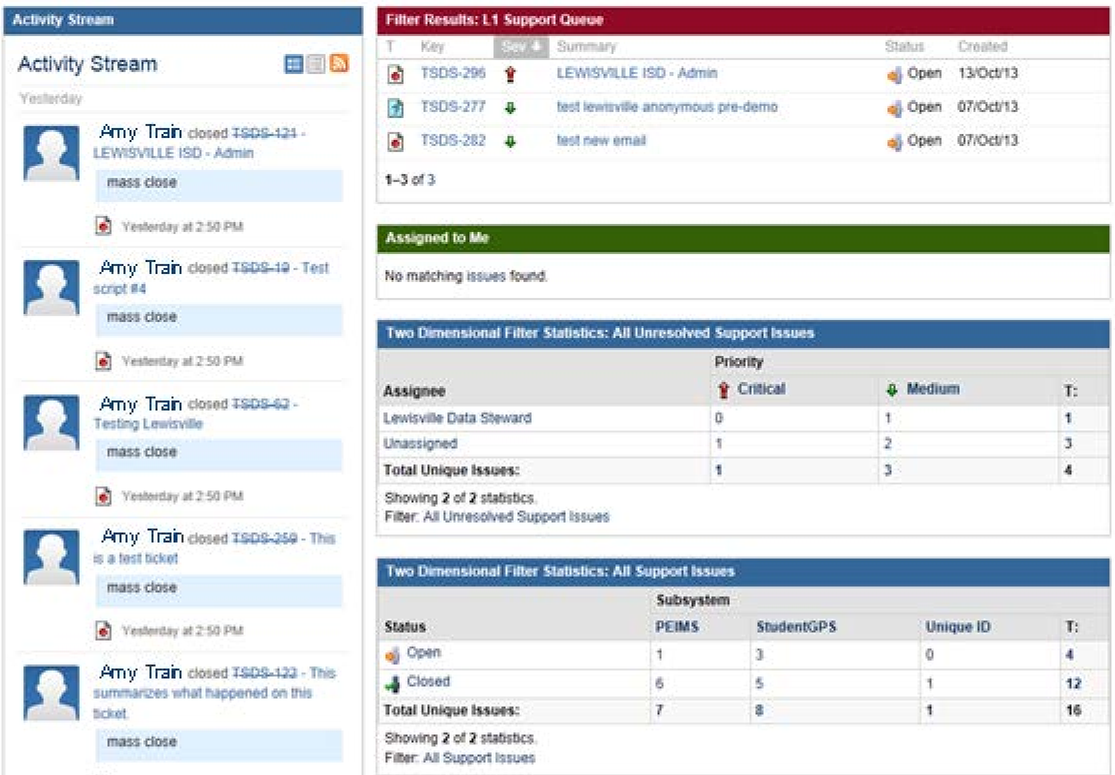


Once you select it, it loads with all the queues and activity stream.

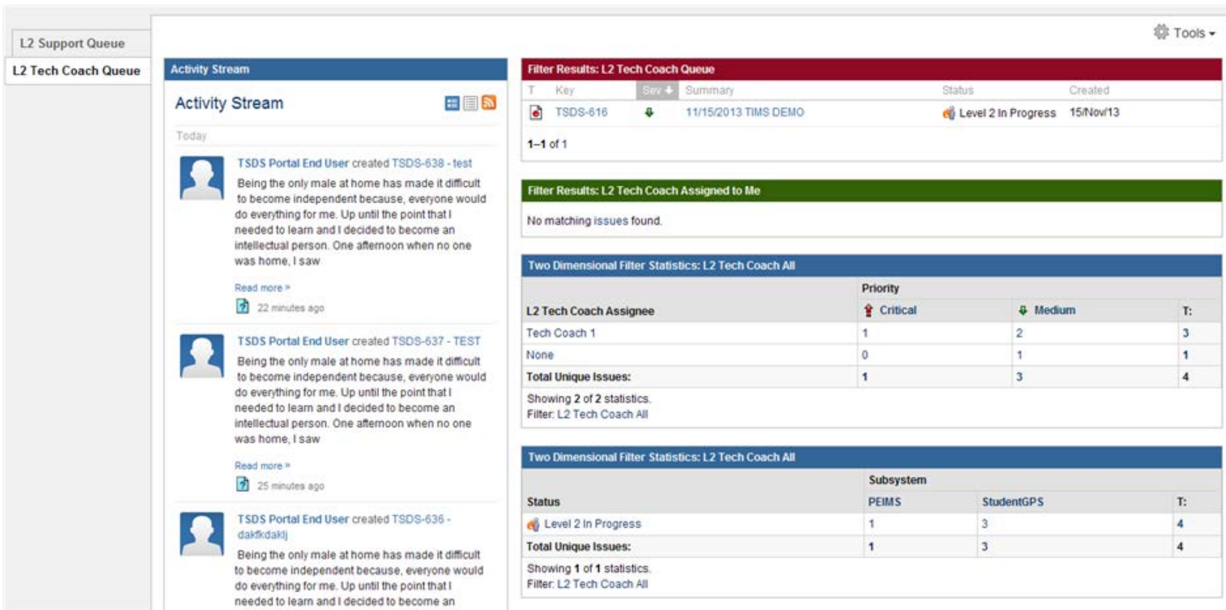


Reviewing the Dashboard

Once it is set up, the dashboard is similar for all support users. The difference will be in the red bar heading, which indicates the level of support, and in the incidents that appear in for each level. This example is a Level 1 Support view. This view should come up by default.

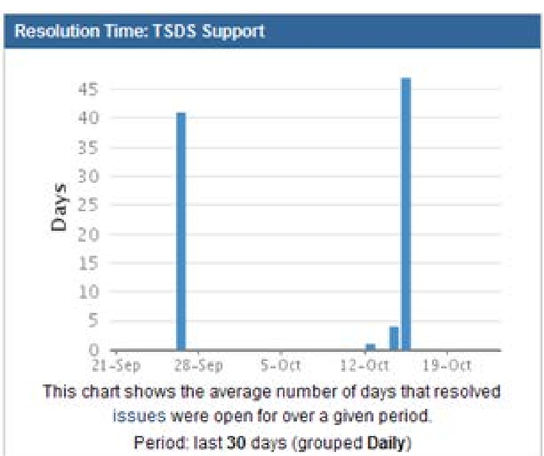


If you are a Level 2 Technical Coach, you can see the technical coach view by clicking L2 Tech Coach Queue. This view looks very similar to the support queue except its queues are limited to incidents that have been referred to a technical coach by another Level 2 Support team member:

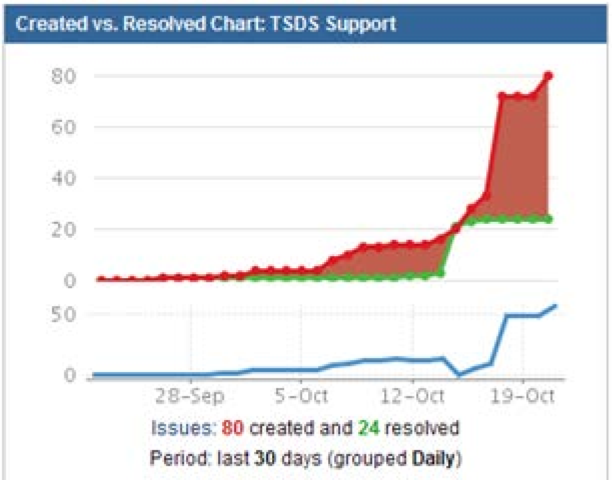


The components, or panes, of the support views are the following:

- **Activity Stream:** a summary of recent activity
- **Support Queue:** the unassigned incidents for the specific level of support. For example, the picture above shows the Level 1 support queue.
- **Assigned To Me:** a list of incidents assigned to the current user
- **Unresolved Support Issues:** all the unresolved incidents for that specific level of support
- **All Support Issues:** all incidents for the specific level of support
- **Resolution Time:** a chart of the average number of days that resolved incidents were open over 30 days



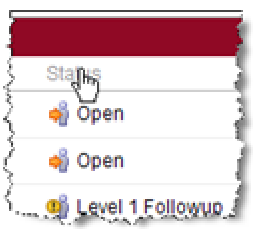
- **Created vs. Resolved Chart:** a chart showing the number of incidents created versus the number resolved over the last 30 days



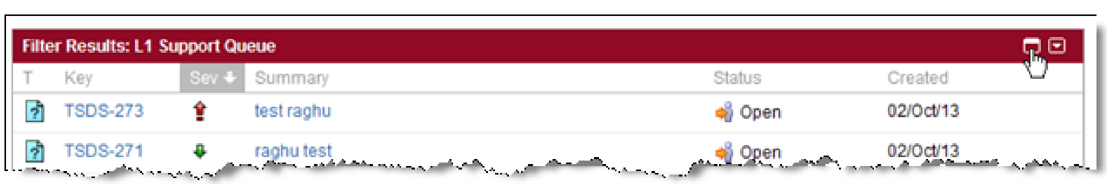
Adjusting the Dashboard

The Dashboard can be adjusted to allow you to view information easier.

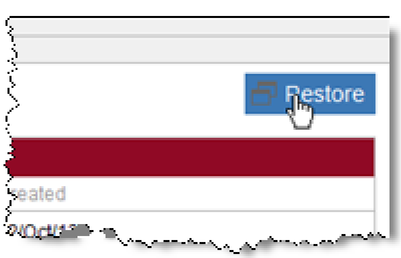
- Click on a column header to sort the view by that column:



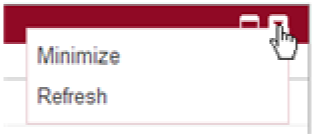
- Click the Maximize icon to open the table to full screen:



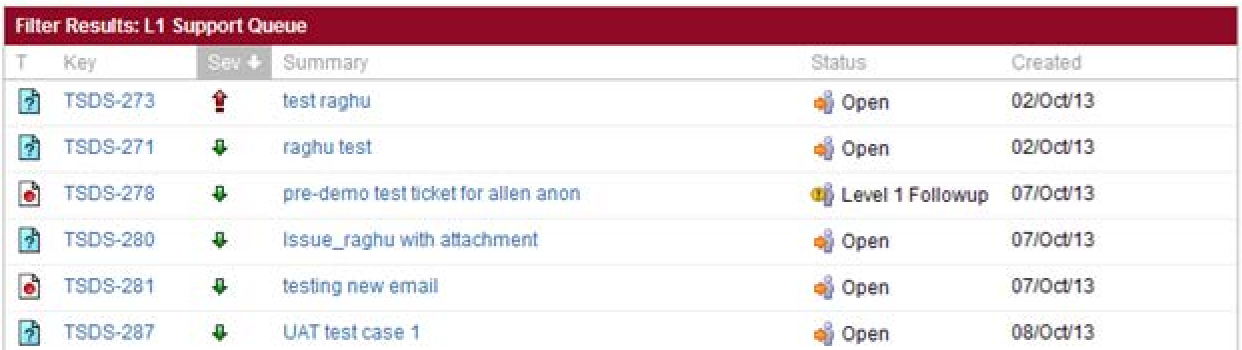
- Click Restore to return the table to its panel size.



- Click on the drop arrow to minimize or refresh the page:



Understanding the Support Queue and Assigned to Me



Filter Results: L1 Support Queue

T	Key	Sev	Summary	Status	Created
	TSDS-273		test raghu	Open	02/Oct/13
	TSDS-271		raghu test	Open	02/Oct/13
	TSDS-278		pre-demo test ticket for allen anon	Level 1 Followup	07/Oct/13
	TSDS-280		Issue_raghu with attachment	Open	07/Oct/13
	TSDS-281		testing new email	Open	07/Oct/13
	TSDS-287		UAT test case 1	Open	08/Oct/13

The **Support Queue** and **Assigned to Me** views show you basic information about an incident. You can work directly from the queue, or you can look at the Detail view (see Viewing the Detail of an Incident) to look at the specifics.

The **T** column contains icons that tell you the type of incident.

Icon	Type
	Question
	Problem
	Enhancement Request
	User Request

The **Key** column shows the incident number.

The **Sev** column shows the severity of the incident:

Icon	Severity	Description
	Critical	The submitter is unable to complete a task because of a crash, loss of data, or severe memory leak
	High	A problem with specific application functionality is causing a major impact.
	Medium	The application is functioning, but not as desired or expected.

	Low	The submitter requested an enhancement, submitted a question on functionality, or encountered formatting issues.

The **Summary** column shows a brief summary of the incident.

The **Status** column shows you the status as explained in Viewing Your Personal Incident Reports.

The **Created** column shows the date the incident was created.

Understanding the Support Issues Tables

The two Support Issues tables show you the number of incidents in various categories. These are basically static displays, but you can click on any link to show the information filtered by what you selected. For example, clicking on the Assignee **Adam Warner** in the example below shows all the unresolved support incidents assigned to Adam Warner.

The **All Unresolved Support Issues** view allows you to see at a glance how many unresolved incidents of each type are assigned to each person on the team.

Two Dimensional Filter Statistics: All Unresolved Support Issues

	Priority			
Assignee	Critical	High	Medium	T:
Adam Warner	0	0	1	1
Allen Data Steward	0	0	1	1
Allen Stewardtwo	0	0	3	3
Escten Champion	0	0	1	1
Test Component Owner User	0	0	3	3
Unassigned	1	1	76	78
Total Unique Issues:	1	1	85	87

Showing 6 of 6 statistics.
Filter: All Unresolved Support Issues

The **All Support Issues** view allows you to see at a glance the total number of incidents in each status for each subsystem application.

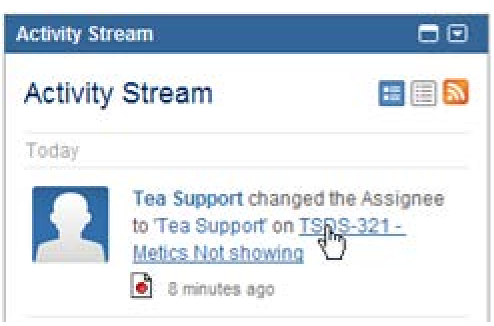
Two Dimensional Filter Statistics: All Support Issues				
	Subsystem			
Status	PEIMS	StudentGPS	Unique ID	T:
Open	68	4	0	72
In Progress	2	0	0	2
Resolved	1	4	0	5
Closed	5	13	1	19
Level 2 Incoming	1	2	0	3
Level 3 Incoming	0	3	0	3
Level 4 Incoming	1	1	0	2
Level 3 Followup	0	1	0	1
Under Review	2	0	0	2
Level 3 In Progress	1	0	0	1
Level 2 In Progress	0	1	0	1
Level 1 Followup	1	0	1	2
Total Unique Issues:	82	29	2	113
Showing 12 of 12 statistics. Filter: All Support Issues				

Both of these tables have clickable links in every cell, which makes them extremely useful for viewing exactly what you wish to view. For example, if you were a Level 4 Support person for studentGPS™ Dashboards, then you would only be interested in the **Level 4 Incoming** incidents that are in the **StudentGPS** column. You could click that number to see the incident (only one incident in this example above) or to filter to only those incidents if there were more of them.

Viewing the Detail of an Incident

There are several ways to open the detail view of an incident:

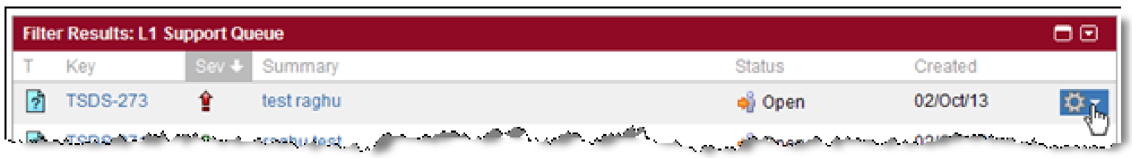
- By clicking the link to the incident in the **Activity Stream:**



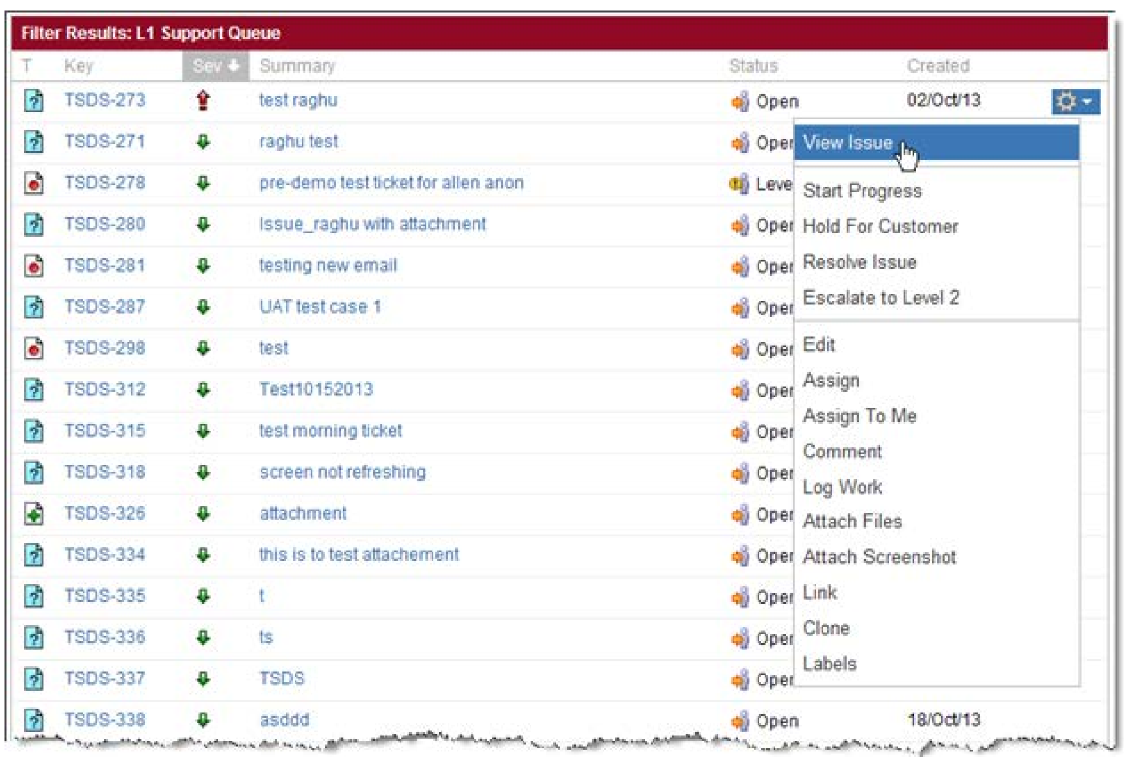
- By clicking the link to the incident in one of the queues:

- By accessing the menu from one of the queues:

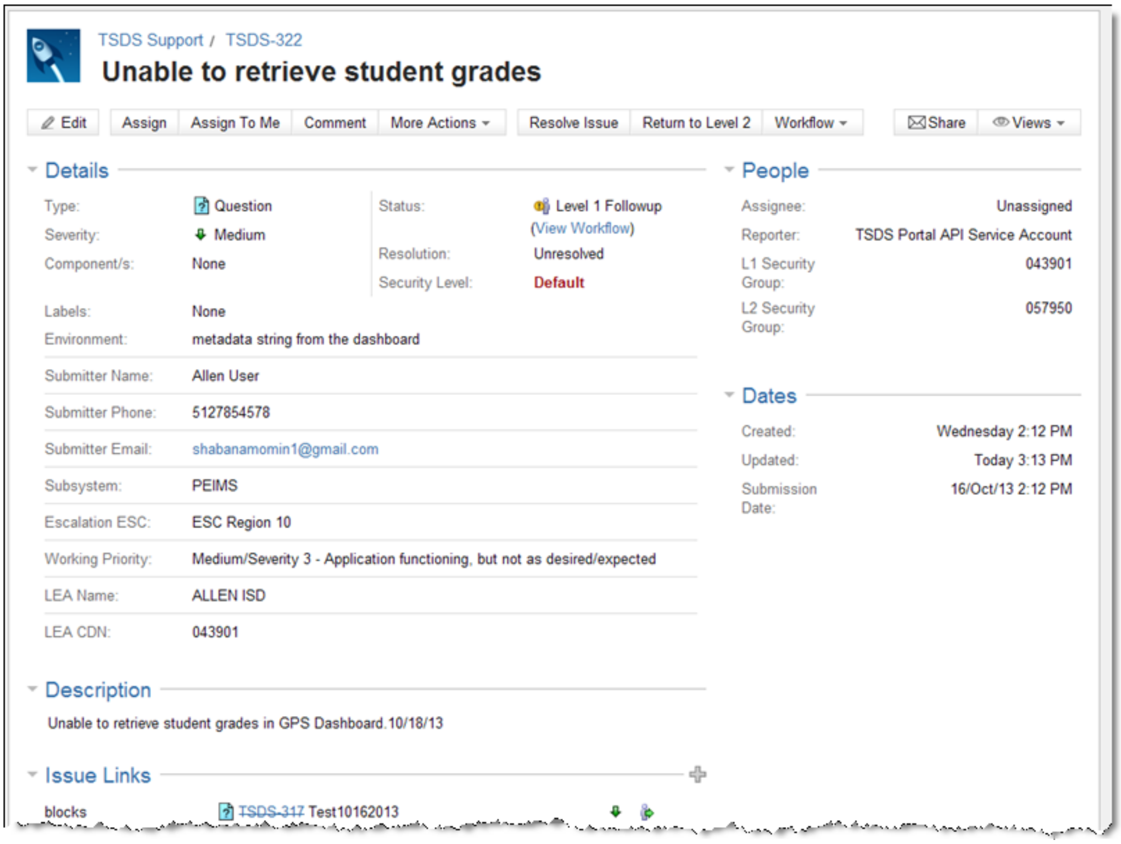
  Hover the mouse over the right side of the incident in the queue until the gear and arrow icon appears.



  Select **View Issue** from the menu. The options listed on this menu will be different depending upon the level of support and the status.



No matter which process you used, the incident opens in the detail view:



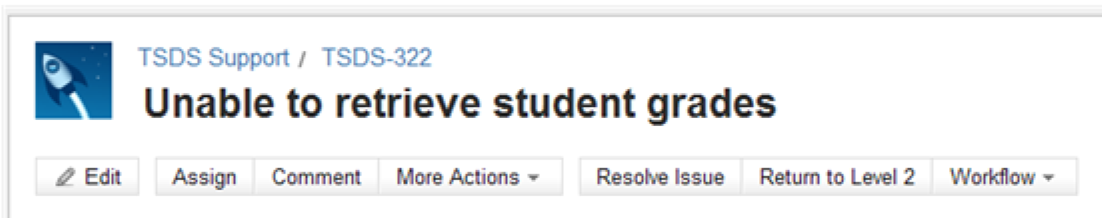
From here, you can see a great deal more information about the problem. You can also edit it, assign it, resolve it, return it, view the workflow, and attach documents. Instructions for doing so are contained in the sections following.

The buttons at the top of the page change depending upon what level of support you provide. For example, if you were TIMS ESC Support user providing Level 2 support, a button would read **Return to Level 1** as one possible action.

Most of the following sections explain how to work on tasks in the detail view and from the queues. The rest of this section explains some of the features of the detail view.

Top-Row Buttons

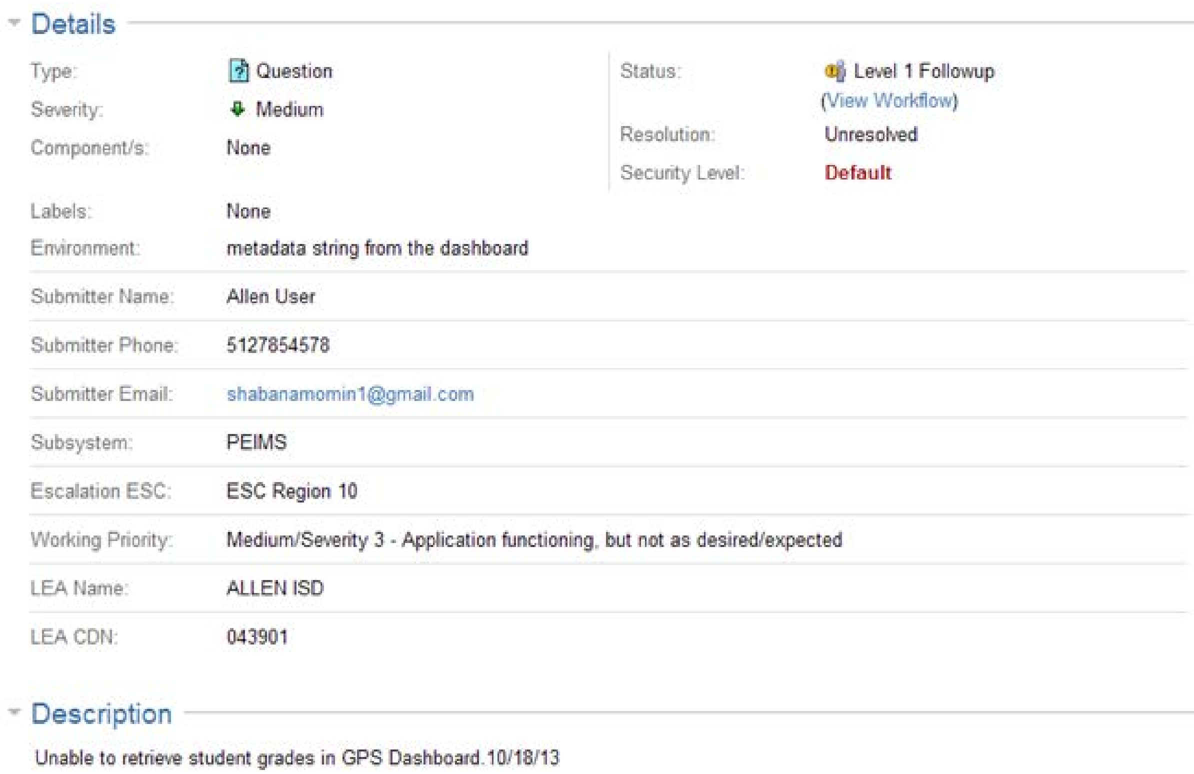
The buttons at the top edge of an incident provide alternate methods of accomplishing tasks that you can also do from the queues. These buttons will be covered in context of the tasks to be performed. The buttons that appear in this view depend upon your level of support and to some extent upon the work that has already been completed for an incident. The buttons in the following example appear for TIMS LEA (Level 1) Support and an incident that has already been returned from TIMS ESC (Level 2) Support for follow-up:



In contrast, here are the buttons that appear for Level 1 Support for a new incident that has not yet been assigned:

Details

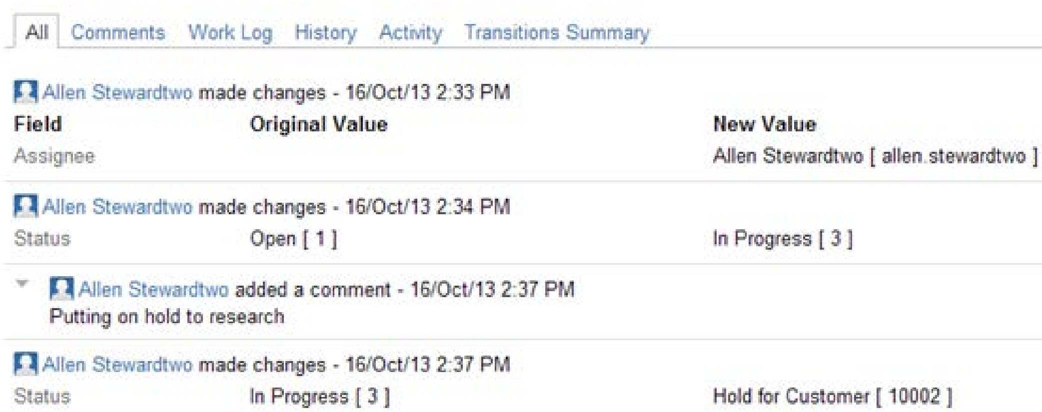
The details of the incident appear in the Details pane. This is the same information entered by the submitter of the incident.



Activity

The **Activity** pane at the bottom of the incident shows different views of any activity that has taken place for an incident. The pane remains set to whichever tab you opened last.

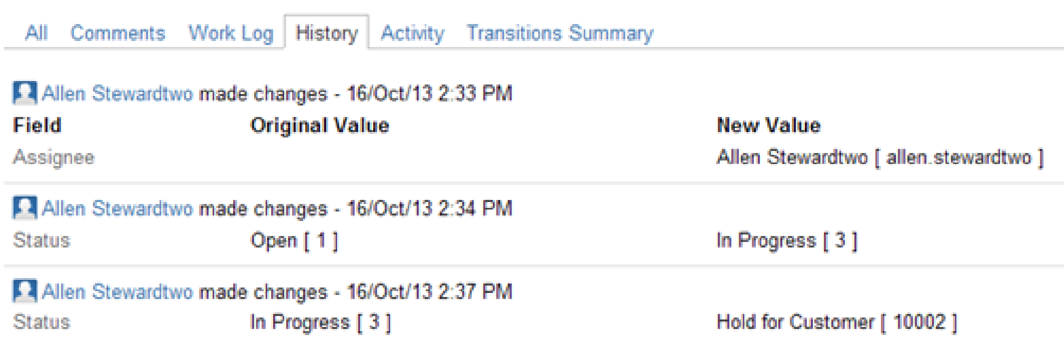
- **All:** provides a log of all the activity that has taken place.



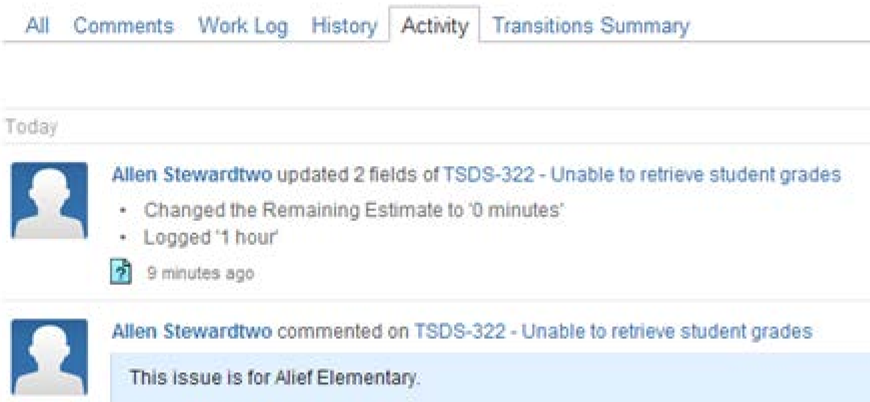
- **Comments:** shows all the comments made through the lifecycle of an incident.

- **Work Log:** shows each work log entry and allows you to edit it.

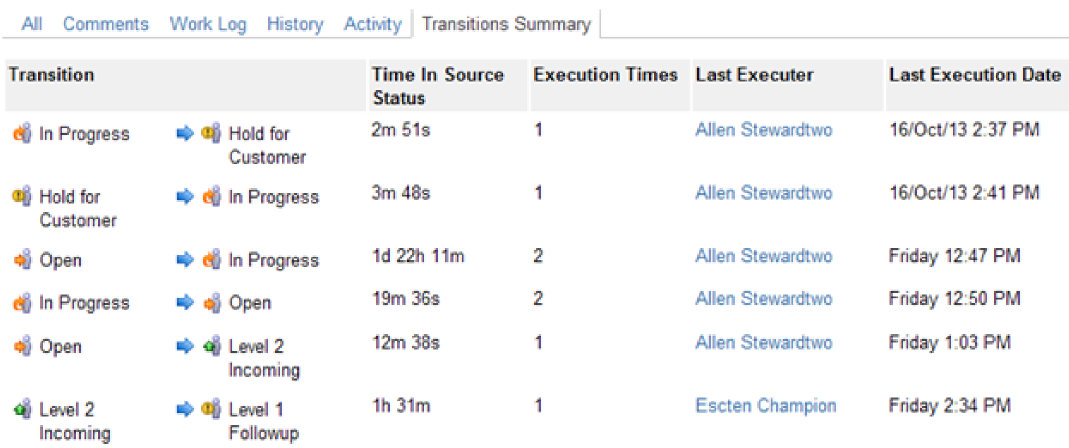
- **History:** shows the history of changes for the incident, showing the name of the thing that changed (a field, a status, a description), the original value, and the new value.



- **Activity:** records all activity involving an incident.



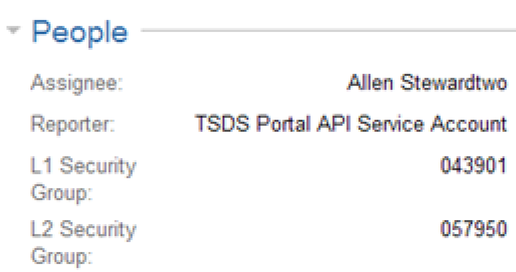
- **Transitions Summary:** shows information about each change in status and level:



Transition		Time In Source Status	Execution Times	Last Executer	Last Execution Date
In Progress	Hold for Customer	2m 51s	1	Allen Stewardtwo	16/Oct/13 2:37 PM
Hold for Customer	In Progress	3m 48s	1	Allen Stewardtwo	16/Oct/13 2:41 PM
Open	In Progress	1d 22h 11m	2	Allen Stewardtwo	Friday 12:47 PM
In Progress	Open	19m 36s	2	Allen Stewardtwo	Friday 12:50 PM
Open	Level 2 Incoming	12m 38s	1	Allen Stewardtwo	Friday 1:03 PM
Level 2 Incoming	Level 1 Followup	1h 31m	1	Escten Champion	Friday 2:34 PM

People

The **People** pane shows who reported or who has been working on an incident:

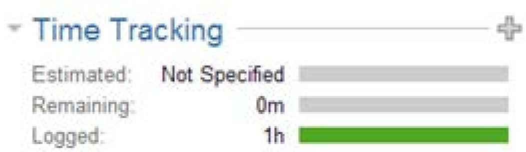


Dates

The **Dates** pane shows the creation, update, and submission dates for an incident:

Time Tracking

The **Time Tracking** pane only appears if some time data has already been logged. It shows the estimates, if any have been made; the remaining estimated time, if an estimate was made; and the time logged:



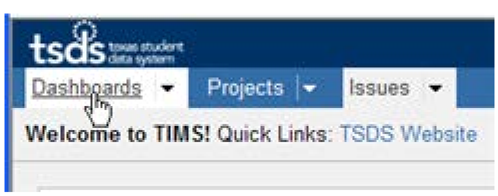
You can also easily add time tracking data from this view by clicking the plus sign.

Printing the Detail of an Incident

The **Views** menu at the top right of the detail view allow you to view the incident in three different formats. The most useful to you may be the Word format and the printable version. To print this view, click **Views > Printable Version** and then print the resulting view.

Returning to the Dashboards from the Detail View

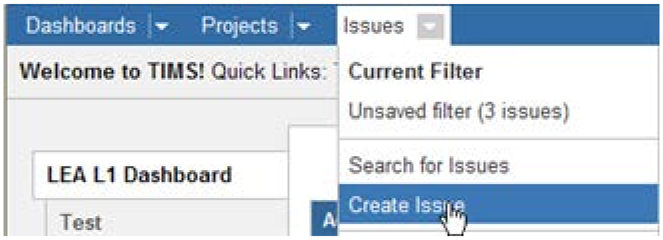
To return to the dashboards from the detail view, click **Dashboards** at the top left of the page:



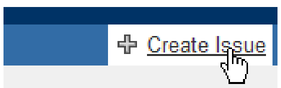
Submitting an Incident

To submit an incident for yourself or for a customer, follow these steps:

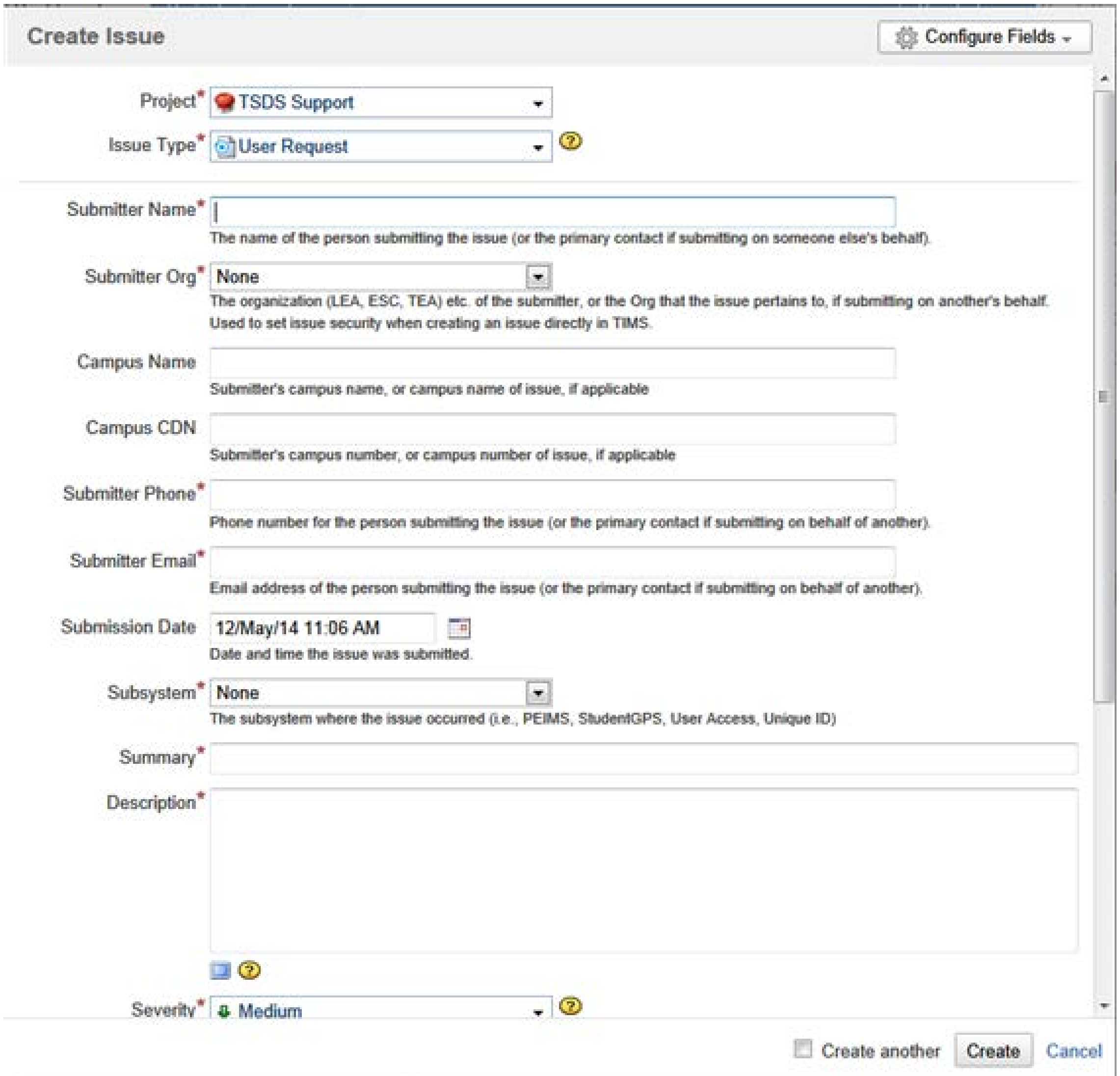
1. Select the option one of two ways:
   - From the menu at the top of the page, select **Issues > Create Issue.**

   - At the top right of the page in the light blue bar, select **Create Issue:**

   The incident creation form appears:



The required fields on this form are indicated with a red asterisk. However, it is always good practice to provide as much information as possible, so that the support staff can understand the incident and reproduce it.

2. Select the applicable **Project** from the drop-down menu.
3. Select the **Issue Type:**
   - **Problem:** to report a problem that prevents the functioning of the product
   - **Question:** to ask the support team a question
   - **Enhancement Request:** to request an enhancement from support
   - **User Request:** to report a user request
4. Type the **Submitter Name** or the name of the primary contact, if you are submitting the request for someone else.
5. For **Submitter Org,** select the submitter's or primary contact's organization from the list.
6. Type the **Campus Name** for the campus that was affected by the incident or where it was observed, if applicable.

7. For **Campus CDN,** type the county-district number of the campus reporting the incident, if applicable.
8. Type a phone number for the submitter or primary contact.
9. Type an email address for the submitter or primary contact.
10. The **Submission Date** is automatically set for the current date and time, but if the date was a different one, click the calendar icon to select a different date. You can click on a date in the current month or use the arrows to find a different month. Click **x** to close the box.
11. Select the **Subsystem** where the incident was observed.
12. Type a **Summary** of the problem.
13. Type a detailed **Description** of the problem. If you encountered a defect, type what you were doing that made the incident occur. The more detail you can provide, the better.

Important: **Do not** include personal identifying information such as district student or staff names, social security numbers, student or employee IDs, DOB, addresses, etc., in ticket the **Summary** field. You *may* add such information to the **Description** field or create and refer to attachments that contain personal information, if they are necessary for incident resolution. *If end users include such information in a submitted incident, move it to an attachment.*

14. Select the **Severity** of the incident, as follows:
    - **Low:** the submitter has a question, is asking for an enhancement in functionality, or having problems with the display or formatting of information.
    - **Medium:** the application works but produces incorrect, incomplete, or inconsistent results, or the problem impairs usability.
    - **High:** a problem with specific application functionality is causing a major impact on the submitter's work.
    - **Critical:** the submitter encountered a system failure.
15. If there is some kind of **Attachment**, a data spreadsheet or screen capture, for example, click **Browse** to find the file and attach it.
16. Type appropriate information about the user's **Environment**, for example, browser type, software platform, or hardware information.
17. Click **Create.**

Assigning an Incident to Yourself

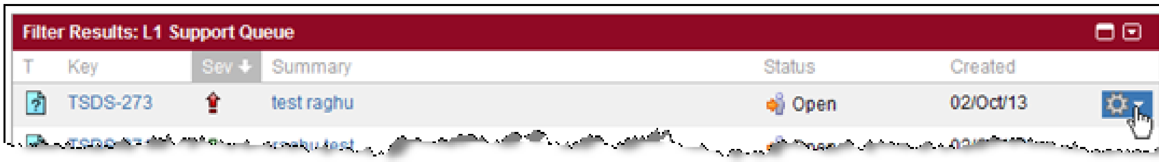
There are two ways to perform this task, from the detail view of the incident or from the **Support Queue**.

From the Detail View

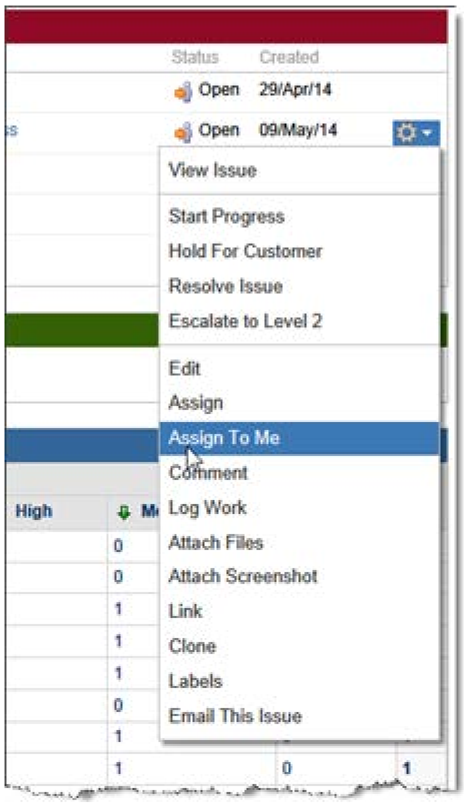
If you are already in the detail view of the incident, click **Assign To Me**. The incident then appears in your **Assigned To Me** queue.

From the Support Queue

- Hover the mouse over the right side of the incident until a gear and arrow icon appears:



- Click and select **Assign To Me** from the menu. The appearance of this menu will be different depending upon which status the incident is in and which level of support you are working in. This example is for Level 1 Support.



The incident then appears under **Assigned To Me.**

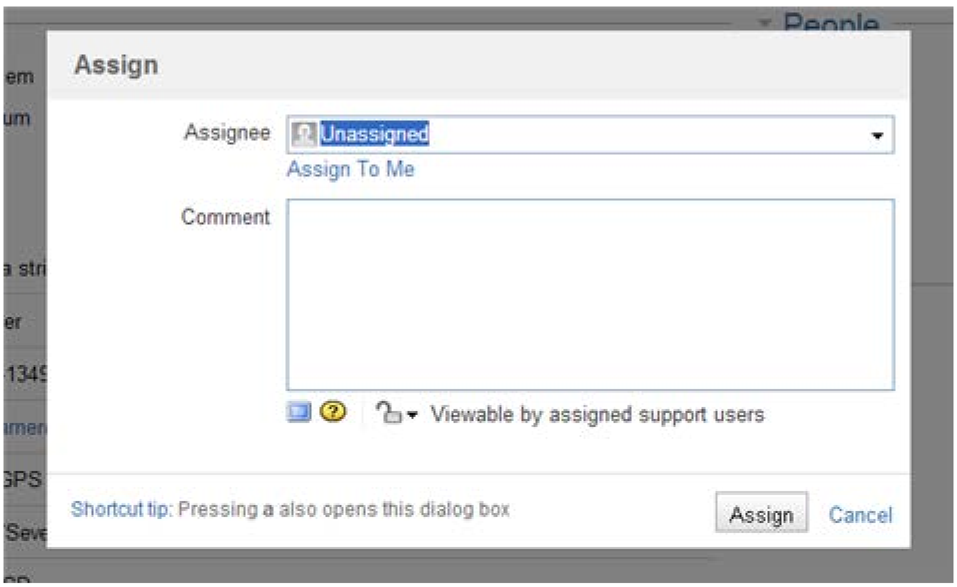
Assigning an Incident to Someone Else

There are two ways to perform this task, from the detail view or from the queues.

1. Select the **Assign** option as follows:

   - If you are already in the detailed view of the incident, click **Assign.**
   - From the queues, hover the mouse on the right side of the incident until the gear and arrow appear, click, and select **Assign** from the menu.

   The dialog box that appears looks slightly different depending upon where you opened it but contains the same options:



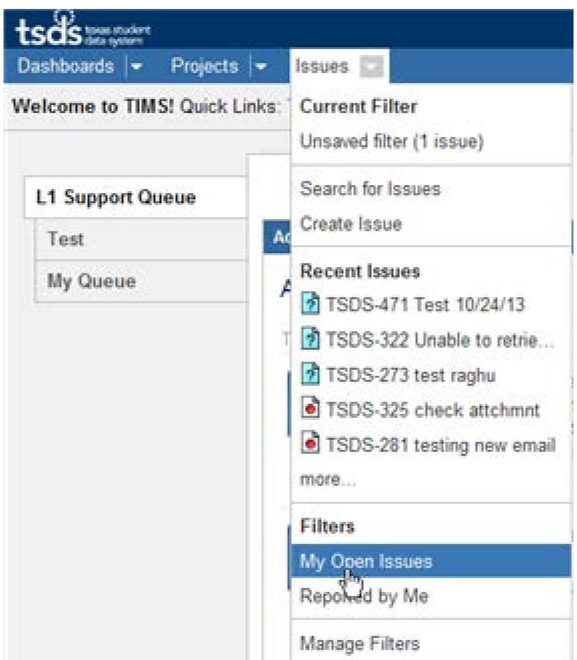
2. For **Assignee,** you can select **Unassigned** or **Automatic** from the drop-down menu, or you can start typing someone's name. If the system can find a name that matches what you are typing, it fills in a name.
3. Type a comment explaining why you are reassigning the item.

4. If you wish to restrict who can view this information, click the lock symbol below the comment and select a role or group.

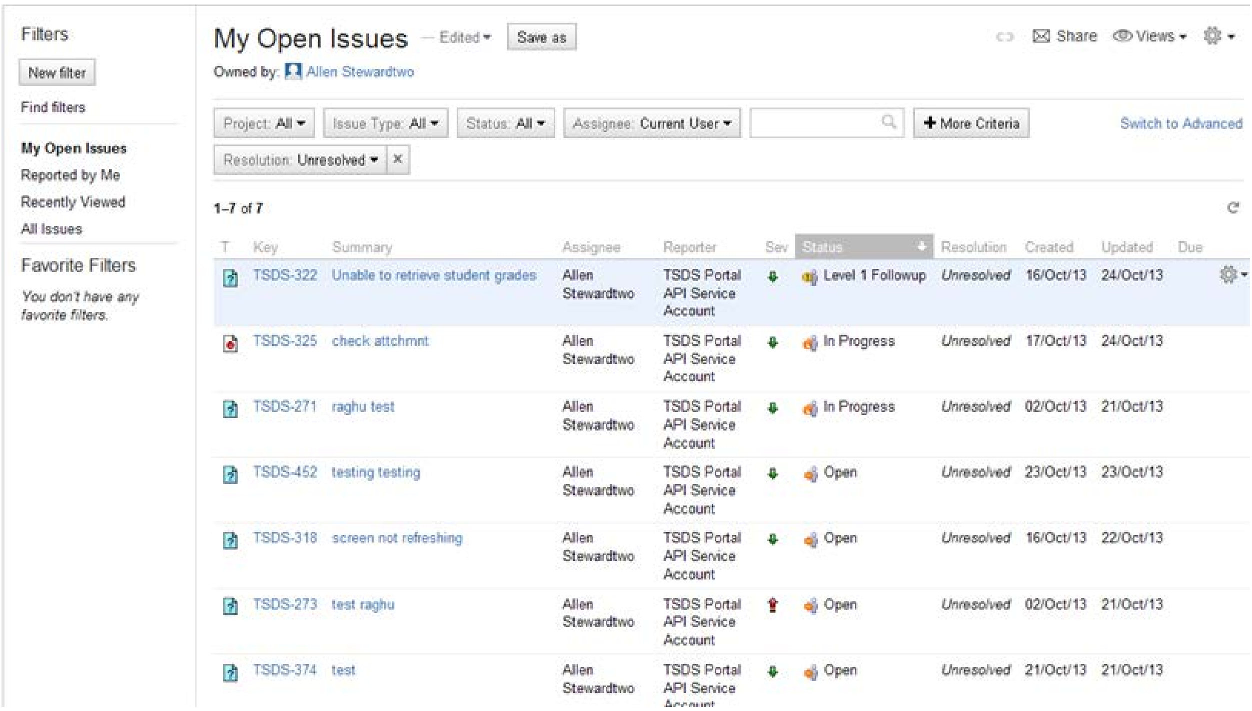
5. Click **Assign.**

Viewing All Your Open Incidents

Aside from viewing your incidents in **Assigned To Me,** you can use the filter **My Open Issues** to view your open incidents. Select **Issues > My Open Issues.**



This view presents a little more information to you than the dashboard.



By using the menu that opens under the gear and arrow icon, you can perform all of the tasks that you can perform from the queues, as described in the following sections of this guide.

Sorting

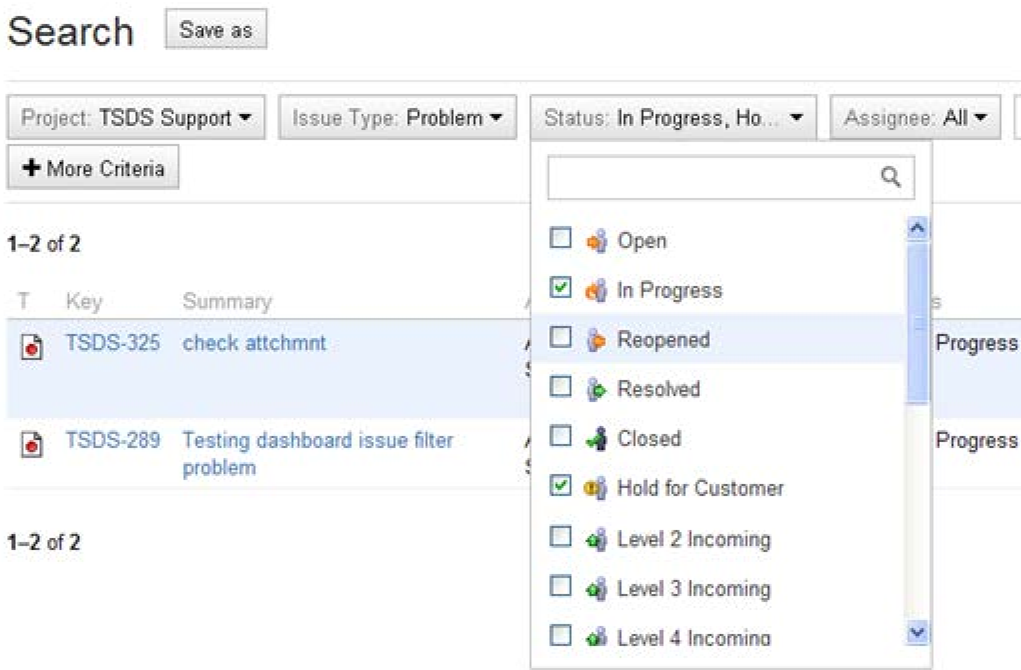
You can sort each column by clicking the header at the top of the column. Click again to sort the column in the opposite direction.

Using Filters

You can also use the filters listed on the left-hand panel to look at incidents you reported, you recently viewed, or all. You can use the filter buttons on top to filter the information that appears in the current view.

You can create additional filters following these steps:

1. Click the **New Filter** button.
2. Select a combination of the buttons at the top. For example, suppose I wanted to look at TSDS Support problems only, with a status of **In Progress** and **Hold for Customer.** The following example shows the selection of the statuses with the other filters already selected:



3. To save the filter, click **Save as**.

4. Type a name for the filter.
5. Click **Submit.**

Receiving email Notifications

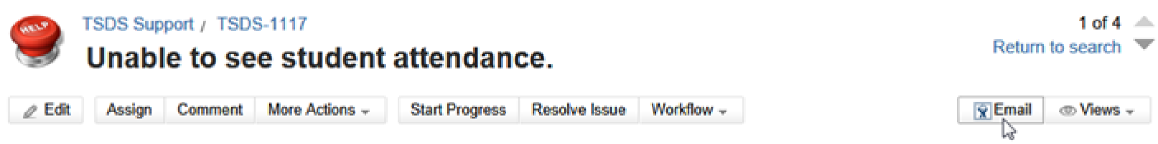
The person who automatically receives email notifications about an incident's status is the person entered as **Submitter Email** when the incident was created. This person receives emails when an incident is created and when it is resolved. See Submitting an Incident for more information.

Sending email Messages

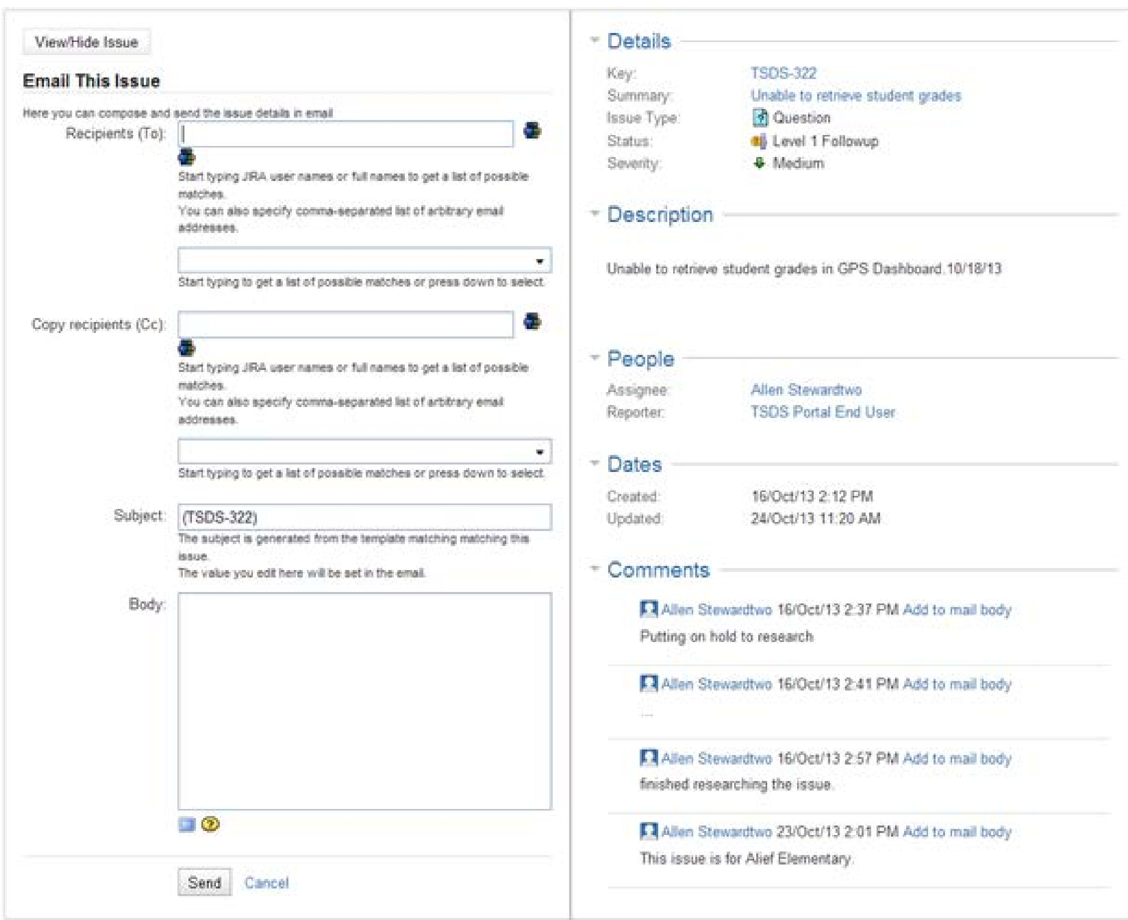
You can manually send email updates to other registered TSDS support staff from the detail view of the incident.

Important: Do not use this feature of TIMS to send sensitive data over the email system.

1. Click **Email** from the detail view:



The following page opens:



2. Begin typing the user name of the person to whom you wish to send information. As you type a user name, the system tries to identify the user. Once it does, click the name. You can enter more than one name, separated by commas.
3. Enter the name of any recipients who should receive copies.

4. Type a subject for the message.
5. Type a note about the incident.
6. Click **Send.**

Starting Work

If an incident is not yet in progress, you can begin work on it from either of the views.

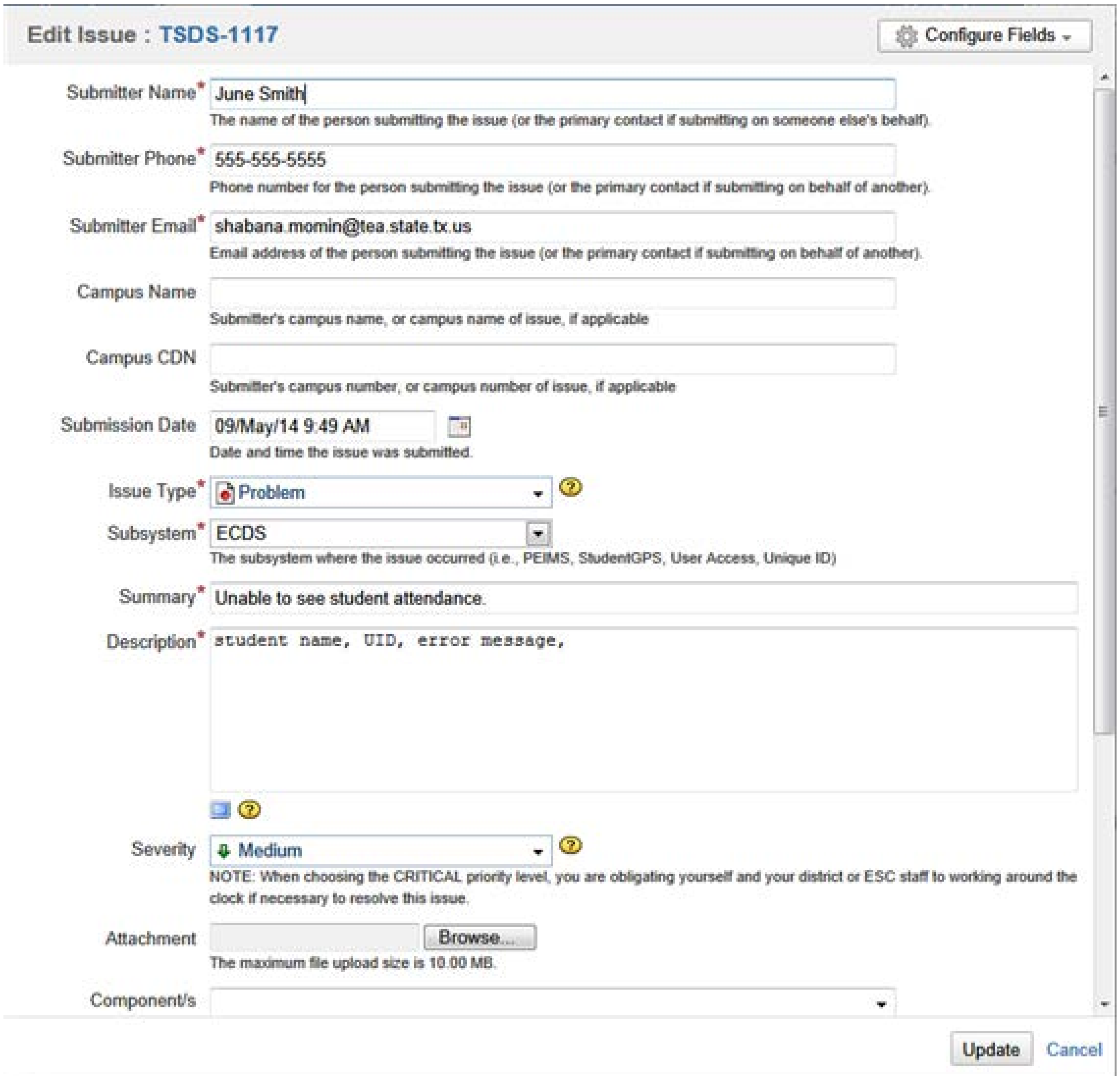
- From the detail view of the item, click **Start Progress.**
- From the queues, hover the mouse on the right side of the incident, click, and select **Start Progress.**

  If the incident is not in your queue, it moves into your **Assigned To Me** list. The incident's status is set to **In Progress.**

Editing an Incident

Follow these steps to edit an incident:

1. Select the option one of the following ways:
   - From the detail view of the incident, click **Edit.**
   - From the queues, hover the mouse on the right side of the incident until the gear and arrow appear, click, and select **Edit**.
2. An editable copy of the original incident opens, allowing you to edit any of the fields or add attachments.



The Edit page includes an extra field called **Submitter Notification Comment.** Make any changes or additions necessary. The **Submitter Notification Comment** will be returned to the submitter of the incident when the incident is resolved.

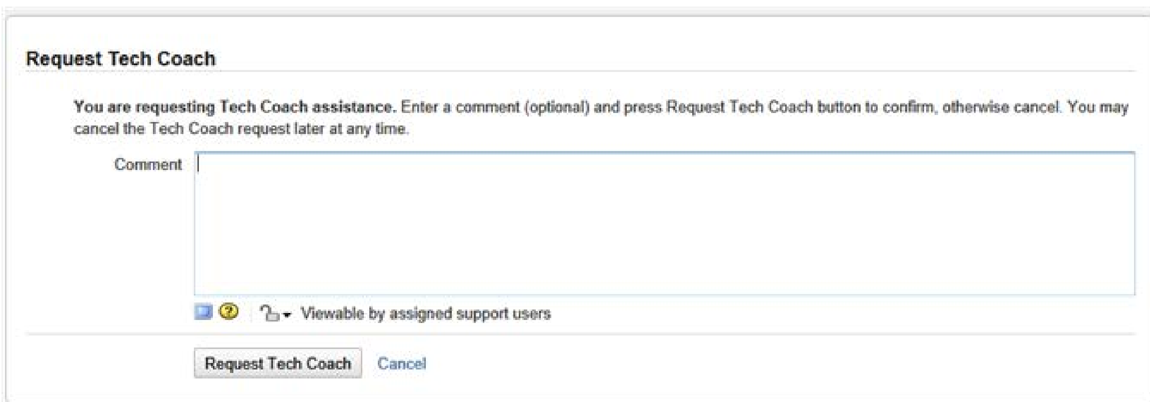
3. Click **Update** when you are finished with your changes.

Referring a Problem to a Technical Coach

If you are a Level 2 ESC and an issue is proving difficult to resolve you can refer it to a Level 2 technical coach.

> **Note:** This feature can only be used by Level 2 (ESC) Support and when the ticket is in **L2 in Progress** status.

1. Select the option one of the following ways:
   - From the detail view of the incident, click **Workflow > Request Tech Coach.**
   - From the queues, hover the mouse on the right side of the incident until the gear and arrow appear, click, and select **Request Tech Coach**.



2. Type a comment providing any needed information.

3. Click **Request Tech Coach.** After you make this selection, the **Workflow** for this incident tab is disabled.

Cancelling the Level 2 Tech Coach Request

A Level 2 ESC support person can cancel the technical coach request at any time and move the ticket back into **L2 in Progress** status.

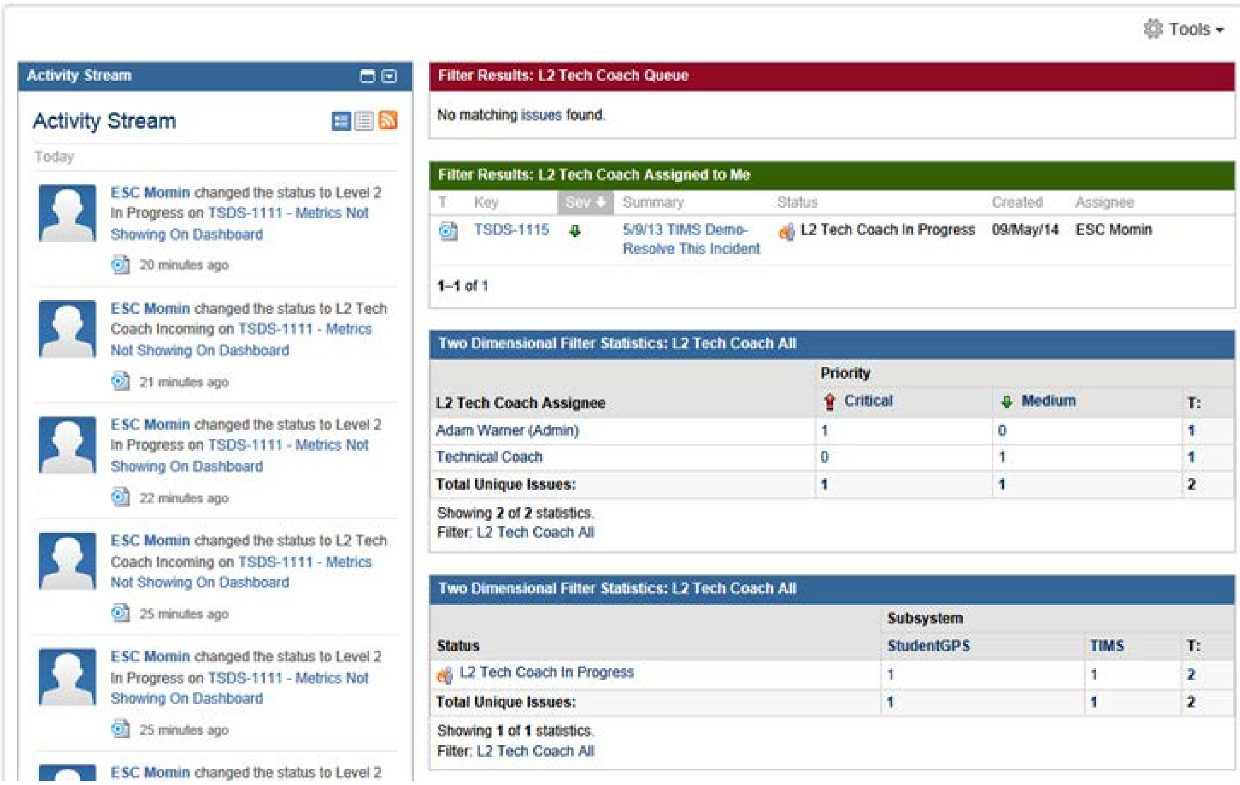
1. From the menu on the queue or the detail view of the incident, click **Cancel Tech Coach.**

2. Type a comment if applicable.

3. Click **Cancel Tech Coach.**

Working a Tech Coach Request

If you are a technical coach, you have a queue that is similar to that of the other support people. Issues assigned to technical coaches appear in your queue.

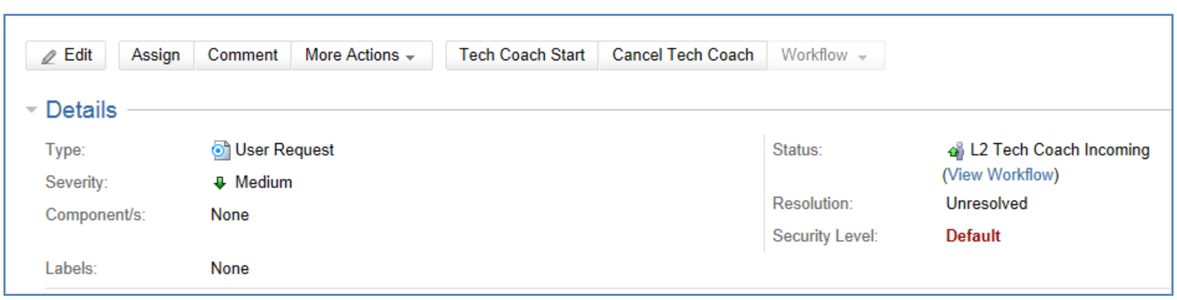


When you are ready to work an assignment, do the following:

1. Assign it to yourself as follows:

   - From the detail view of the incident, click **Assign To Me.**
   - From the queues, hover the mouse on the right side of the incident until the gear and arrow appear, click, and select **Assign To Me**.

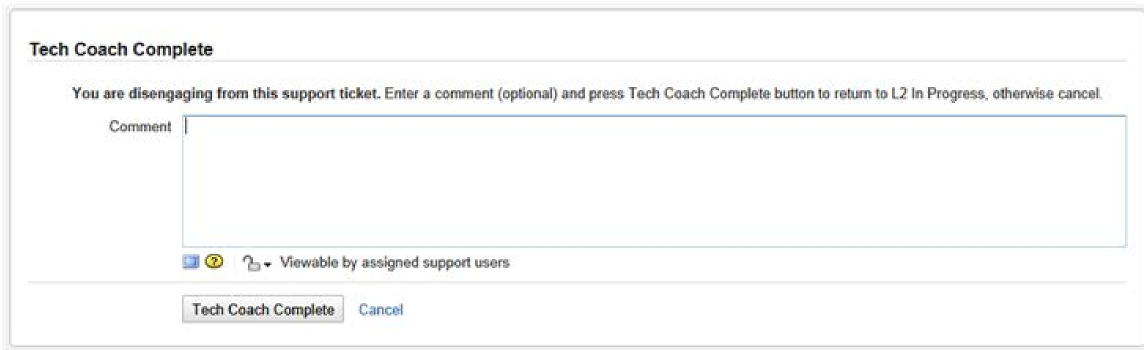
2. Click **Tech Coach Start** either from the queue or the detail view of the incident.



Completing a Tech Coach Request

After the technical coach has finished working the request, complete the request as follows:

1. Select the option one of the following ways:
   - From the detail view of the incident, click **Tech Coach Complete.**
   - From the queues, hover the mouse on the right side of the incident until the gear and arrow appear, click, and select **Tech Coach Complete**.

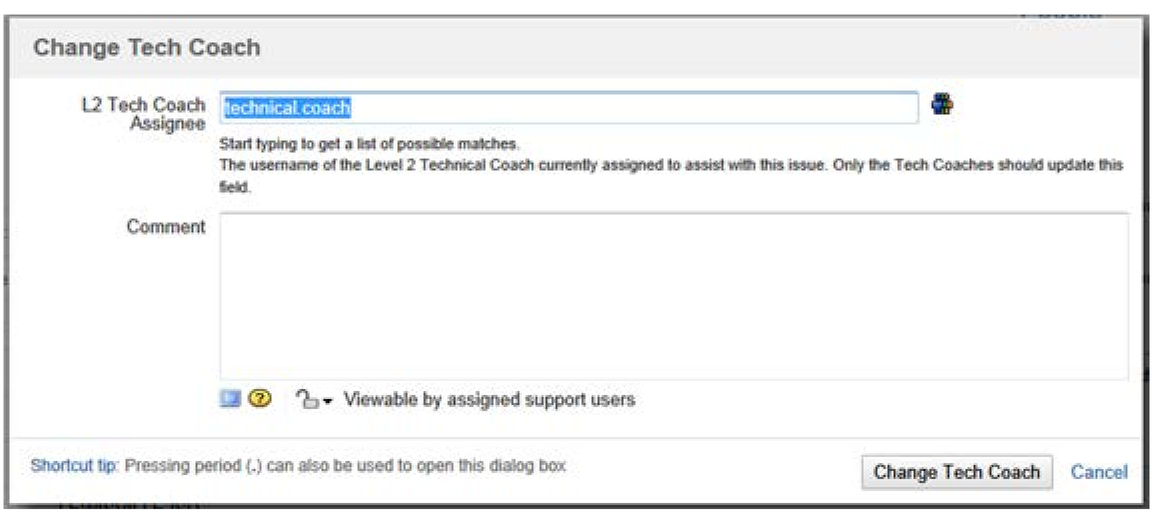


2. Type a comment providing any needed information.
3. Click **Tech Coach Complete.**

Changing the Tech Coach

If you are a technical coach and have an issue that needs to be assigned to someone else, you can change the coach.

1. Select the option one of the following ways:
   - From the detail view of the incident, click **Change Tech Coach**
   - From the queues, hover the mouse on the right side of the incident until the gear and arrow appear, click, and select **Change Tech Coach**.



2. For **L2 Tech Coach Assignee,** begin typing the name of the coach and select it, or you can click the people icon and select the name from the list.

3. Type a comment if applicable.

4. Click **Change Tech Coach.**

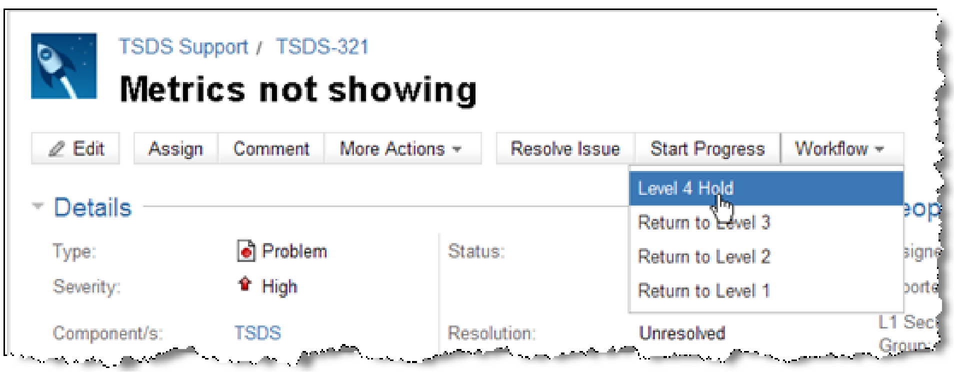
Putting an Incident on Hold

If an incident does not have enough information or if you need more clarification, you can put the incident in a hold status. The option is different for Level 1 than for the other levels.

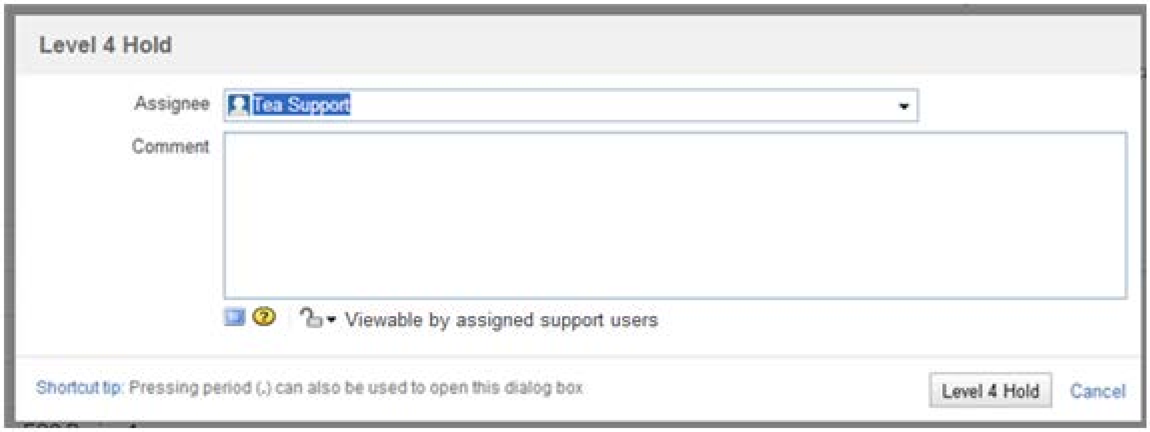
1. Select the option one of two ways:

   - From the detail view of the incident, select **Workflow > Level # Hold.** In the example below, the support level is Level 4 Component Owner.

   - From the queues, hover the mouse on the right side of the incident, click, and select **Hold for Customer** for Level 1, or if you are at a higher level, **Level # Hold.** For example, at Level 4, the option would be **Level 4 Hold.**



2. The dialog box that appears looks slightly different depending upon whether it opens from the queues or the detail view. The application assigns the incident to the appropriate level. The default for Level 2 through 4 Support is to send it back down to the previous level. The values that appear in this menu depend upon your support level.



   Type a comment about why you are placing this incident on hold.

3. If you wish to restrict who can view this information, click the lock symbol below the comment and select a role or group.

5. Click **Hold for Customer** if you are Level 1 Support or **Level # Hold** for other levels. For example, if you are Level 4 Support, this button reads **Level 4 Hold.**

Escalating an Incident to the Next Level

If, after investigating and working the incident, you are unable to resolve it, you can escalate it to the next level from either the detail view or the queues. This option is not available for incidents that have been returned for follow-up. This feature works a little differently for Level 1 than for the other levels.

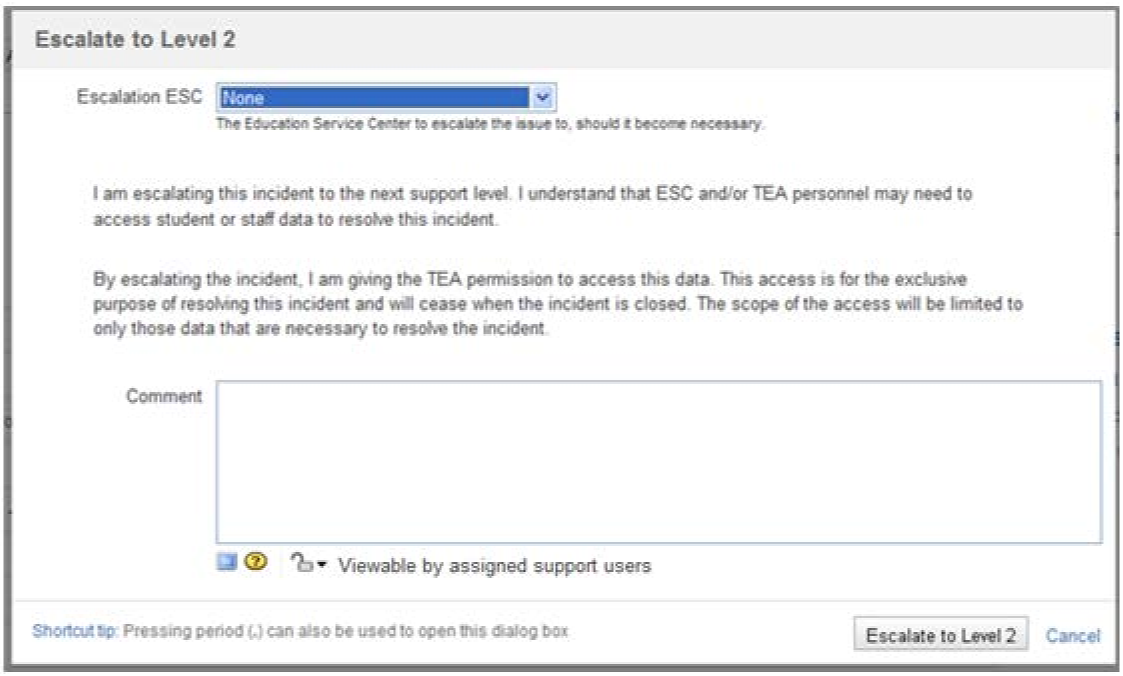
For Level 1

1. Select the escalation option:

    - If you are already in the detailed view of the incident, click **Workflow > Escalate to Level 2.**

    - From the queues, hover the mouse on the right side of the incident until the gear and arrow appear, click, and select **Escalate to Level 2.**

2. A dialog box like the following appears, in which you affirm that you that you are giving permission to ESC or TEA staff to look at student data if required.



3. Select the ESC to which the incident should be escalated.

4. Type a comment explaining what you have done so far and why the incident needs to be escalated.

5. Use the lock icon, if needed, to limit who can view the incident.

6. Click **Escalate to Level 2.**

For the Other Levels

1. Select the escalation option:

    - If you are already in the detail view of the incident, click **Workflow > Escalate to Level #.**

    - From the queues, hover the mouse on the right side of the incident until the gear and arrow appear, click, and select **Escalate to Level #.** The example is at Level 2, escalating to Level 3.

2. Type a comment explaining what you have discovered and why you are escalating this problem to the next level.

3. Click **Escalate to Level #.**

Returning an Incident

If you are in Level 2 Support or higher and you need more information to resolve an incident, you can return it to the previous level, or you can return the incident to a higher level if follow-up has been requested. If you are in Level 1 Support, this option only is available for incidents on follow-up, that is, when they have been sent back to you for more information and you have obtained the information and want to convey it back up the support chain.

Depending upon your support level, you can do this either from the detail view of the incident or from the queues.

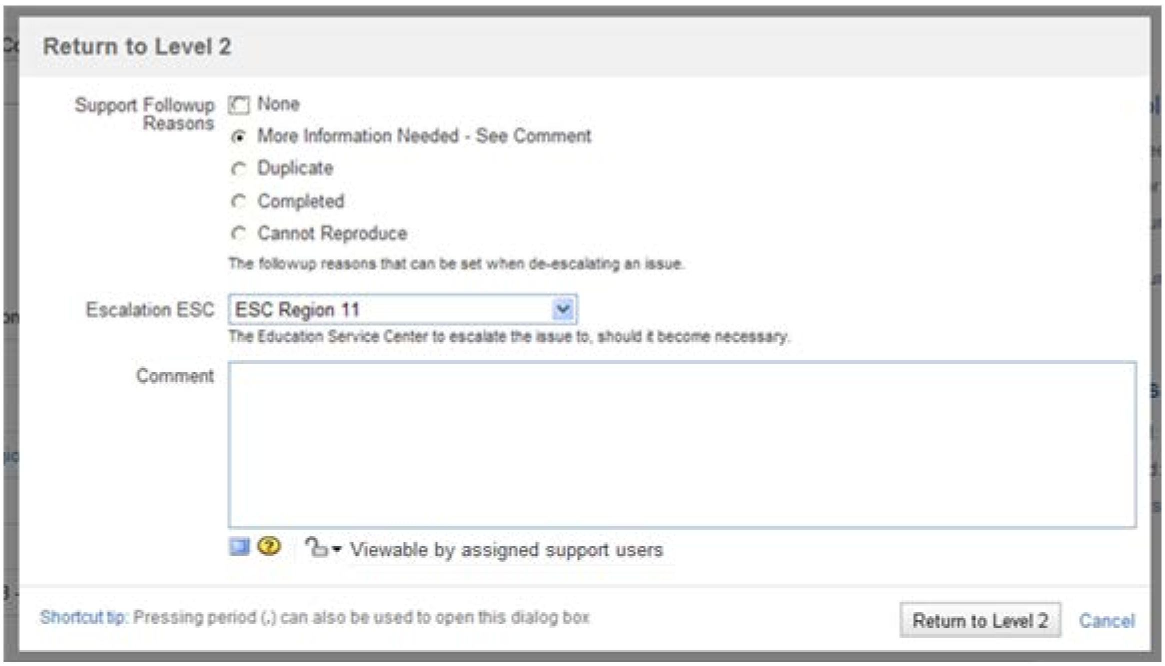
1. Select **Return to Level #** one of three ways:

    - If you are Level 1 Support, **Return to Level 2** appears as a button on the detail view for some incidents. Click **Return to Level 2.**

    - If you are at another level of support, from the detail view select **Workflow > Return to Level #.** This level will usually be the same one from which it was sent to you. For example, if Level 3 (TEA) Support asks you for information, return it to Level 3. All options may not be available. For example, if the incident has only made it to Level 2, you cannot return it to Level 3.

- From the queues, hover the mouse on the right side of the incident until the gear and arrow appear, click, and select **Return to Level #,** depending upon the level to which you want to send it.

The dialog box that appears looks slightly different depending upon whether it opens from the queues or the detail view:



2. Click the reason you are returning the incident.
3. Select the ESC region to which you want to escalate the incident, if it becomes necessary.
4. Type a comment detailing the information you have been asked to provide.
5. Click **Return to Level #.**

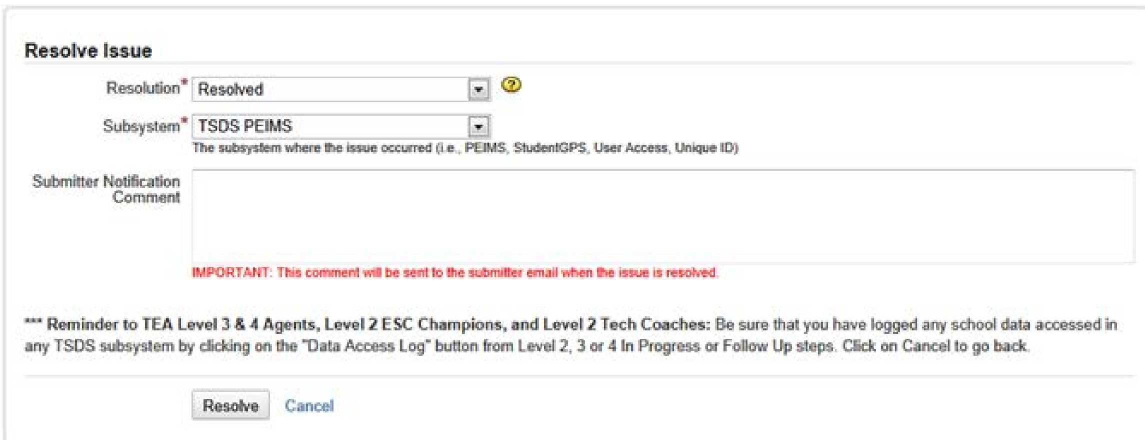
Resolving an Incident

Once you are ready to resolve an incident, you can do that from either the detail view or the queues.

1. Select the option one of two ways:

    - From the detail view of the incident, click **Resolve Issue.**

    - From the queues, hover the mouse on the right side of the incident until the gear and arrow appear, click, and select **Resolve Issue**.



Resolve Issue

Resolution* Resolved

Subsystem* TSDS PEIMS

The subsystem where the issue occurred (i.e., PEIMS, StudentGPS, User Access, Unique ID)

Submitter Notification Comment

IMPORTANT: This comment will be sent to the submitter email when the issue is resolved.

*** **Reminder to TEA Level 3 & 4 Agents, Level 2 ESC Champions, and Level 2 Tech Coaches:** Be sure that you have logged any school data accessed in any TSDS subsystem by clicking on the "Data Access Log" button from Level 2, 3 or 4 In Progress or Follow Up steps. Click on Cancel to go back.

Resolve Cancel

2. Make a selection from the Resolution drop-down menu to indicate the type of resolution:

    - **Resolved:** a resolution has been found.

    - **Work-around Provided to Customer:** a workaround for the problem was found and provided to the customer.

    - **Won't Fix:** the incident will not be fixed.

    - **Duplicate:** the incident is a duplicate of another incident.

    - **Incomplete:** not enough information has been provided to understand the incident.

    - **Cannot Reproduce:** when attempts were made to reproduce the incident, they were not successful.

3. Select the subsystem where the incident occurred.

4. Type a comment *that will be returned to the submitter of the incident* explaining the resolution.

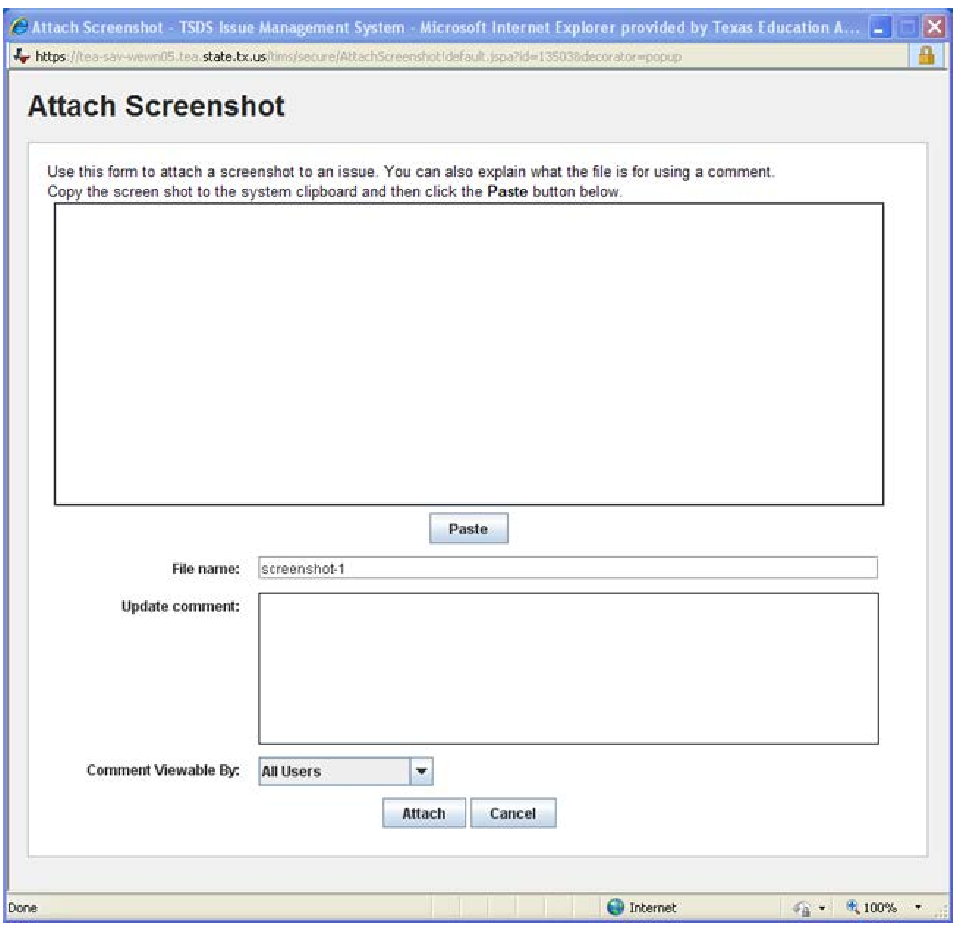
5. Click **Resolve.**

Adding Attachments or Screen Captures

Attachments and screen captures are invaluable tools for diagnosing problems. They may include spreadsheets of data, detailed descriptions of work done on the problem, samples of code, error messages, or images of the problem. Follow these steps to add attachments or screen captures.

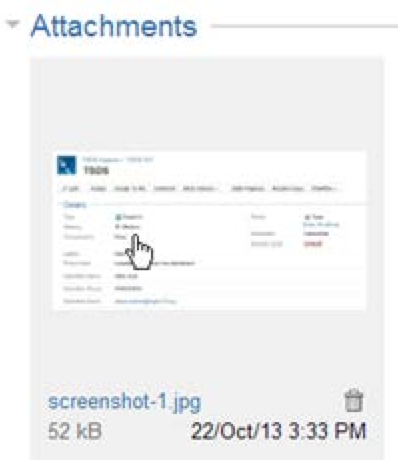
Attaching Screen Captures

1. Select the option one of the following ways:
   - If you are already in the detail view, select **More Actions > Attach Screenshot.**
   - From the queues, hover the mouse on the right side of the incident until the gear and arrow appear, click, and select **Attach Screenshot.**
2. You may be asked to update the Java software on your computer. To do so, click **Free Java Download** and follow the steps to download the software. Restart when finished.
3. Depending upon your security, the browser may attempt to block the dialog box from opening. If it does so, click **Run.**



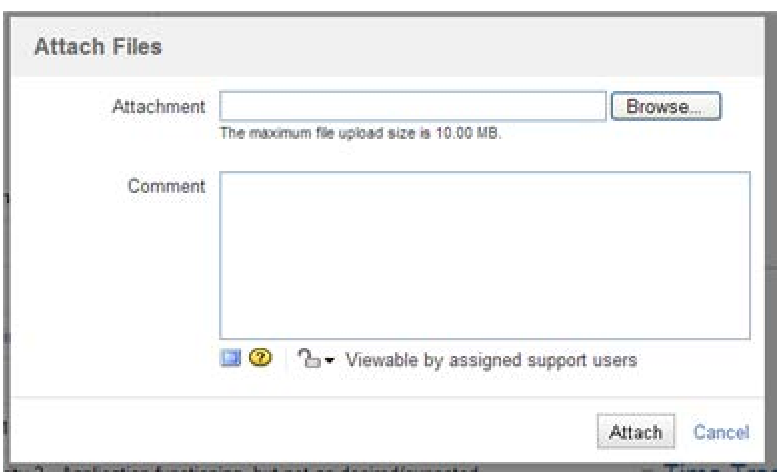
7. Take a screen shot and copy it to the system clipboard.

8. Click the **Paste** button.
9. Type a comment explaining what the screen capture shows.
10. Use the **Comment Viewable By** menu or click the lock icon to select who can view the comment.
11. Click **Attach.** The **Attachments** pane of the detail view shows a miniature of the screen capture that you can open by clicking on it.



Attaching a File

1. Select the option one of the following ways:
   - If you are already in the detail view, click **More Actions > Attach Files.**
   - From either of the queues, hover the mouse over the right side of an incident until the gear and arrow icon appears, click, and select **Attach Files.**



2. Click the **Browse** button and find the attachment as you would usually do.
3. Type a comment explaining the relevance of the attachment.
4. Click the lock icon to select who can view the comment.

5. Click **Attach.** An icon indicating the document type appears in the **Attachments** section of the detail view of the incident. You can save it to your computer by clicking on it.

Removing a Screen Capture or Attachment

If you wish to delete a screen capture or other attachment, do the following:

1. Open the detail view of the incident.
2. Scroll down to the **Attachments** pane and click the trash icon next to the attachment.
3. Verify that you wish to remove the attachment by clicking **Delete.**

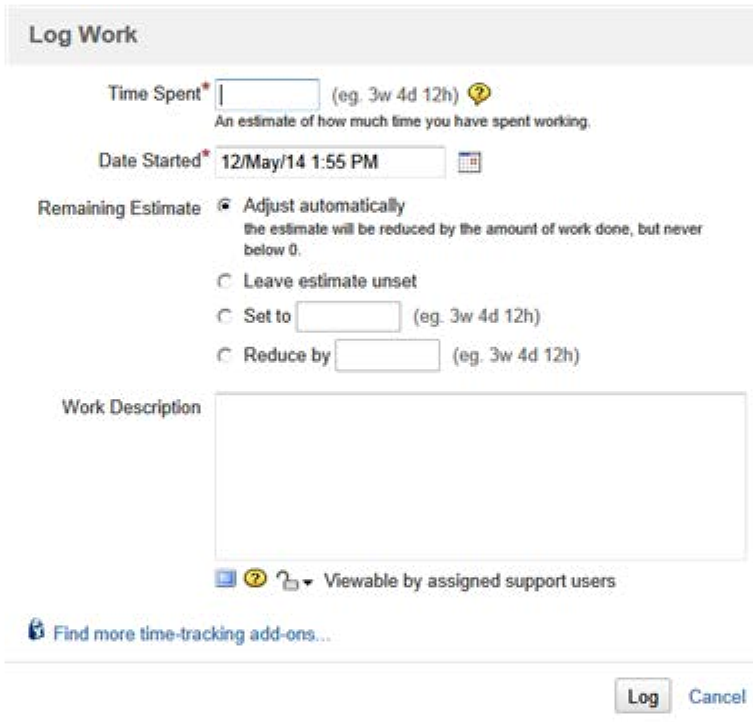
Logging and Estimating Work

As you work an incident, it is important to log what you have investigated or accomplished. Doing so helps the support team at other levels understand what has been done and what might be left to do on that incident. It also provides information for staff members who are researching similar incidents or working on Knowledge Base records. Follow these steps to log work:

1. Select the option one of three ways:
   - If you are already in the detail view of the incident, click **More Actions > Log Work.**
   - If you are in the detail view and *some work on the incident has already been logged,* click the plus sign next to the **Time Tracking** pane at the top right of the incident. *This pane does not appear on incidents where no time tracking has taken place.*

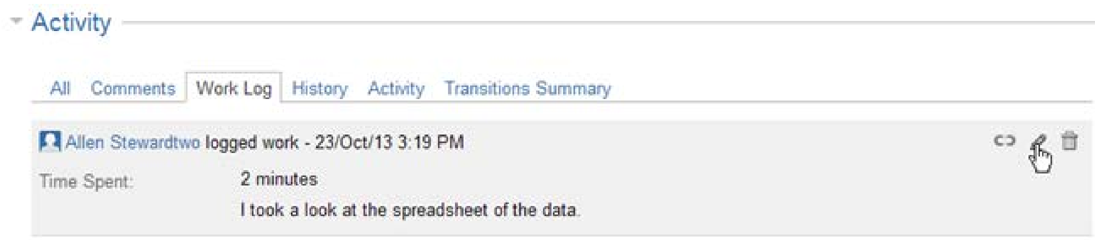
   - From either of the queues, hover the mouse on the right side of an incident until the gear and arrow icon appears, click, and select **Log Work.**

A box like the following appears:



2. Type an estimate of the amount of time spent on the incident so far. Use the example for the format.
3. The date defaults to the current date and time. To enter a new date, click the calendar and select one.
4. Make a selection for updating the estimate information:
   - **Adjust automatically:** updates the estimate as time is added.
   - **Leave estimate unset:** does not track estimates.
   - **Set to:** allows you to set a specific estimate for the work remaining. If you are asked to create an estimate at the beginning of a project, this is the option you should use. Enter the estimate, following the example format.
   - **Reduce by:** reduces an estimate already entered that seems excessive; type the amount to reduce the estimate, following the example format.
5. Type a detailed description of the work you have done.
6. Use the lock icon if you want to restrict who can view your work description. This is important to use if you have included identifying information for students or teachers in your description.

7. Click **Log.** Once you have logged data, it appears in the **Work Log** tab in the detail view of the incident. You can edit the entry by hovering over the log and clicking the pencil icon.



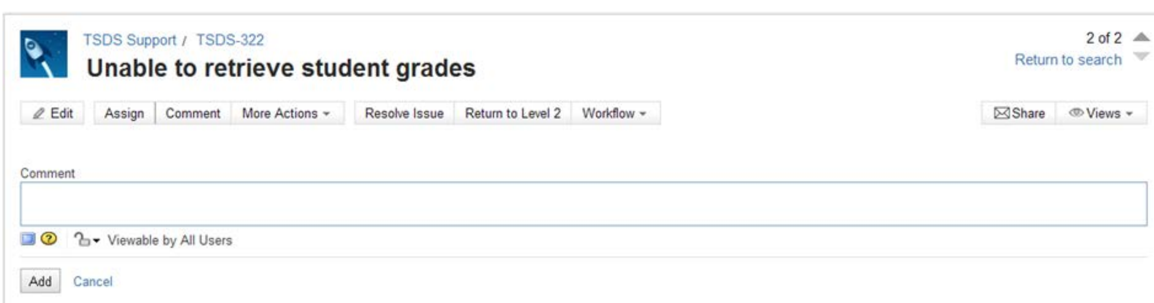
As work is logged, the time spent on an incident is tracked under **Time Tracking** in the detail view of the incident:

Commenting on an Incident

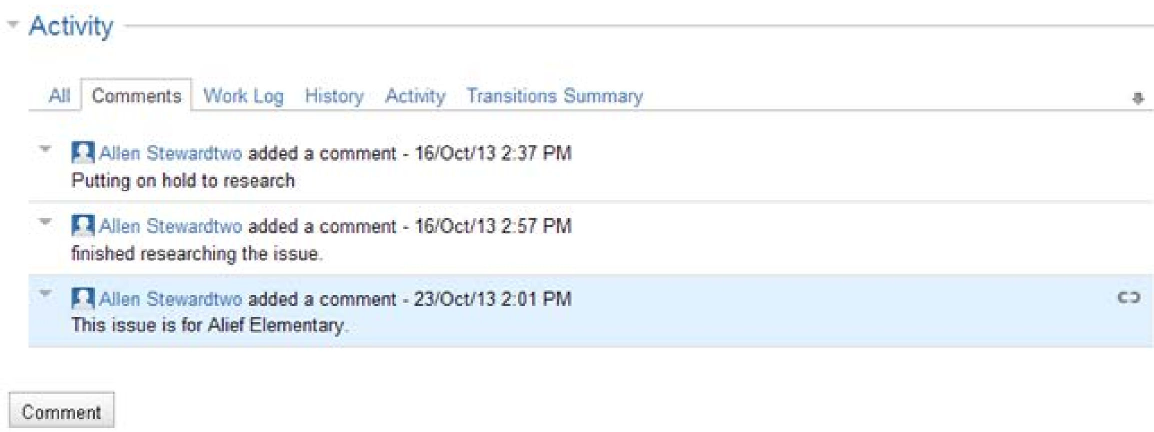
Follow these steps to add a comment to an incident:

1. Select the option one of two ways:
   - If you are already in the detail view, click **Comment.**
   - From either of the queues, hover the mouse over the right side of the incident until the gear and arrow appear, click, and select **Comment.**

   A Comment box appears like the following:



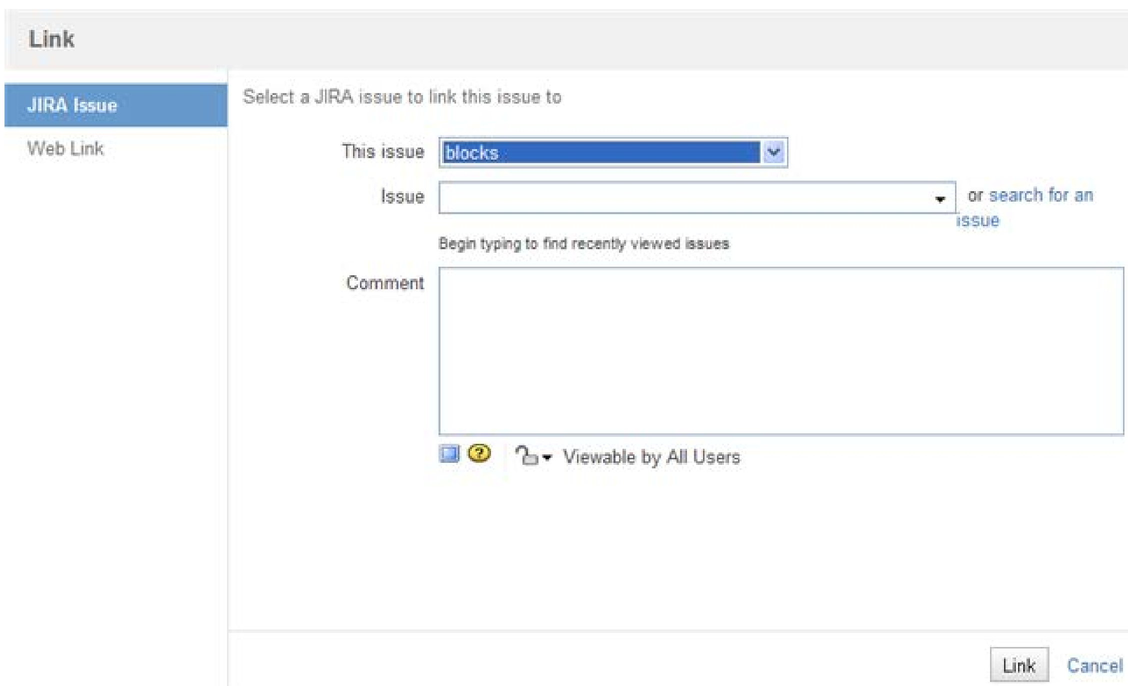
2. Type your comment.
3. Use the lock icon if you want to restrict who can view the comment.
4. Click **Add.** The comment appears on the Activity pane of the detail view, under the Comments tab.



Linking Incidents

If an incident is related to another incident, especially if one incident is a duplicate of another, you will want to link them.

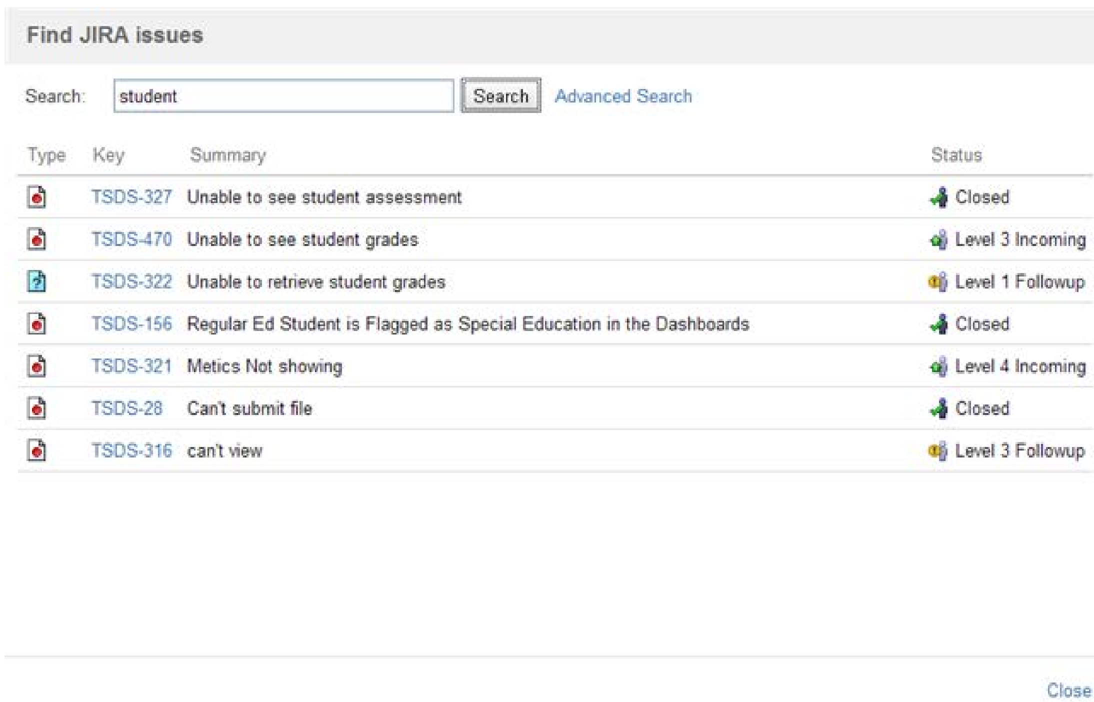
1. Select the option one of two ways:
    - If you are already in the detail view, click **More Actions > Link.**
    - From either of the queues, hover the mouse until the gear and arrow icon appears, click, and select **Link.**



2. For **This issue,** select the reason you are linking the incident to the other incident:
    - **Blocks:** not applicable for our use
    - **Is blocked by:** also not applicable
    - **Clones:** see Cloning an Incident.

- **Is cloned by:** see Cloning an Incident.
- **Duplicates:** is a duplicate of the other incident.
- **Is duplicated by:** the other incident is a duplicate of this incident.
- **Relates to:** is related to the other incident.

3. Select the incident from the list, or **click search for an issue** and follow the bulleted steps.
   - Type a portion of the description of the incident or the incident number in the **Search** field.
   - Click **Search.** The incidents found appear in a list below:

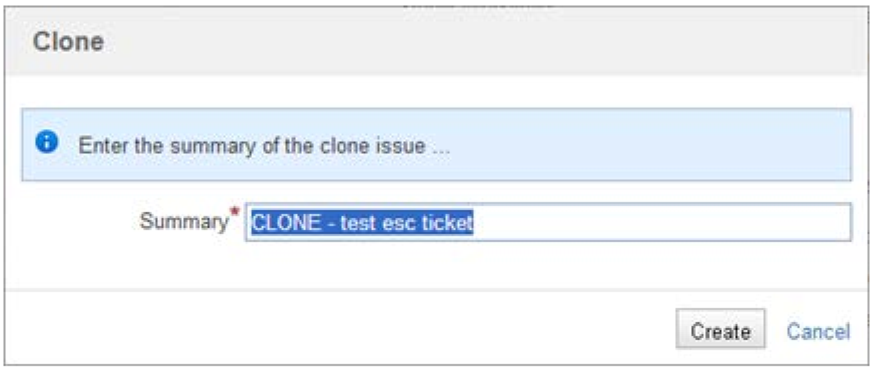


4. Click the appropriate incident. It appears in the **Issue** box with an x next to it so you can delete it, if necessary.
5. Type a comment explaining why the incidents are connected, if necessary.
6. Use the lock icon if you wish to restrict access to the comment to a specific set of users.
7. Click **Link. Linking an incident to an existing incident does not affect the content of the existing incident going forward. If both incidents are open, they must both be processed separately.**

Cloning an Incident

You may have some reason to clone an incident, for example, if a new incident has arisen that is similar to another existing one. You can clone it and then modify it instead of creating it from scratch.

1. Select the option one of two ways:
   - If you are already in the detail view, click **More Actions > Clone.**
   - From either of the queues, hover the mouse until the gear and arrow icon appears, click, and select **Clone.**



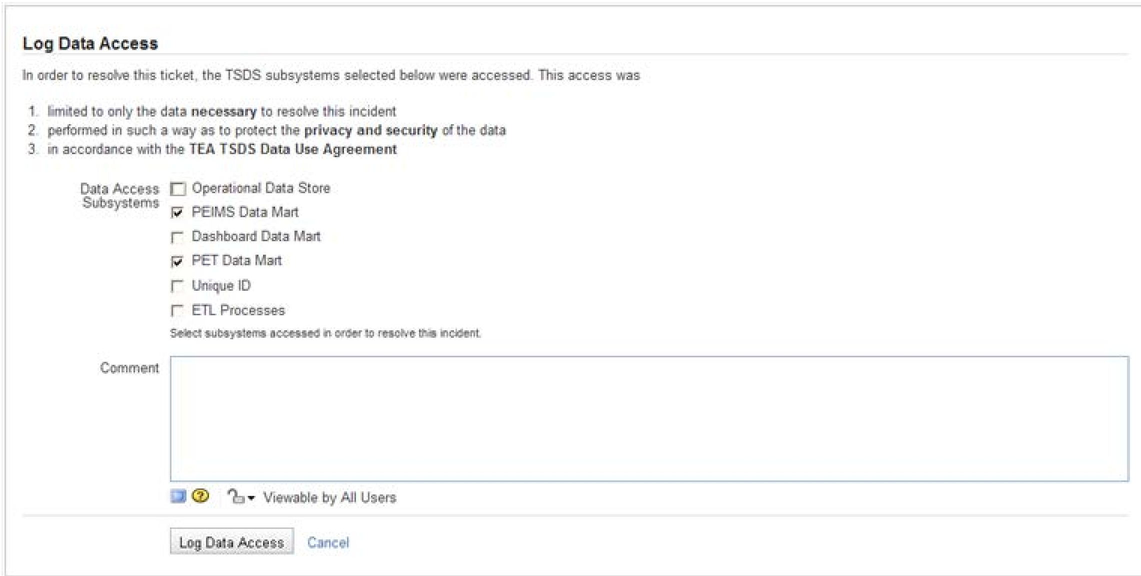
2. Type a new summary for the cloned incident, if desired.
3. Click **Create.**
4. If you are in the dashboards, the cloned incident appears in the support queue, and if you are in the detail view, it appears in your detail view where you can edit it.

Logging Data Access

This section does not apply to TIMS LEA (Level 1) Support.

To maintain compliance with TEA policies and with the FERPA, LEA or ESC data that is escalated beyond Level 1 (TIMS LEA) Support must be logged into the system by Level 2 Support or higher. Once an incident that has student or teacher data attached to it reaches Level 2, 3, or 4 and is put in **In Progress** or **Follow-up** status, use **Log Data Access** to comply with this requirement, as follows:

1. Access the option one of two ways:
   - If you are already in the detail view, click **Workflow > Log Data Access.**
   - From **Assigned to Me,** hover the mouse over the right side of the incident until the gear and arrow icon appears, click, and select **Log Data Access.**



2. Be sure that inclusion of the data meets the restrictions listed at the top of the page.
3. Check the boxes to indicate the types of data that are included in the incident.
4. Type a comment explaining the inclusion of the data.
5. Click the lock icon if you wish to restrict the comment to a specific set of users.
6. Click **Log Data Access.** This change is viewable from the **Comments** tab of the **Activity** section of the incident and also appears in the **Activity Stream.**

Requeuing Incidents

This section does not apply to Level 1 or 2 Support.

If you are at Level 3 Support and above, and you have an **In Progress** incident that you wish to place back into the queue at the same level, you can do so from either the queues or the detail view. An example of when you might do this is if you claimed an issue and then discovered you could not work on it.

1. Select the option one of two ways:
   - If you are already in the detail view, click **Workflow > Level # Re-Queue.**
   - From **Assigned To Me,** hover the mouse over the right end of the incident until the gear and arrow icon appears, click, and select **Level # Re-Queue.**

2. Since you are sending it to the queue, leave the **Assignee** alone and type a comment explaining why you are returning the incident to the queue in the level below.

3. Use the lock icon if you wish to restrict the comment to a specific set of users.

4. Click **Level # Re-Queue.** The incident returns to the queue of the level below.

Closing an Incident

This section does not apply to Level 1, 2, or 4 Support.

If you are at Level 3 Support, you can close an issue if it has been correctly resolved.

From **Assigned To Me,** hover the mouse over the incident until the gear and arrow icon appears, click, and select **Close Issue.** This incident status is changed to **Closed.**

Closing an Issue Assigned to You for Review

If you are at Level 3 Support and an incident has been referred for your review,

1. From the detail view, click **Start Review.**

2. After you finish your review, click **Close Issue.**

3. Select the type of resolution from the **Final Resolution** drop-down menu:

   - **Resolved:** A resolution has been found.

   - **Workaround Provided to Customer:** A workaround for the problem was found and provided to the customer.

   - **Won't Fix:** A determination has been made not to fix the problem.

   - **Duplicate:** The incident is a duplicate of another incident.

   - **Incomplete:** The issue description does not provide enough information to understand the incident.

   - **Cannnot Reproduce:** Attempts to reproduce the issue so as to understand the problem were not successful.

4. Select **Yes** or **No** to indicate whether a Knowledge Base article is needed.

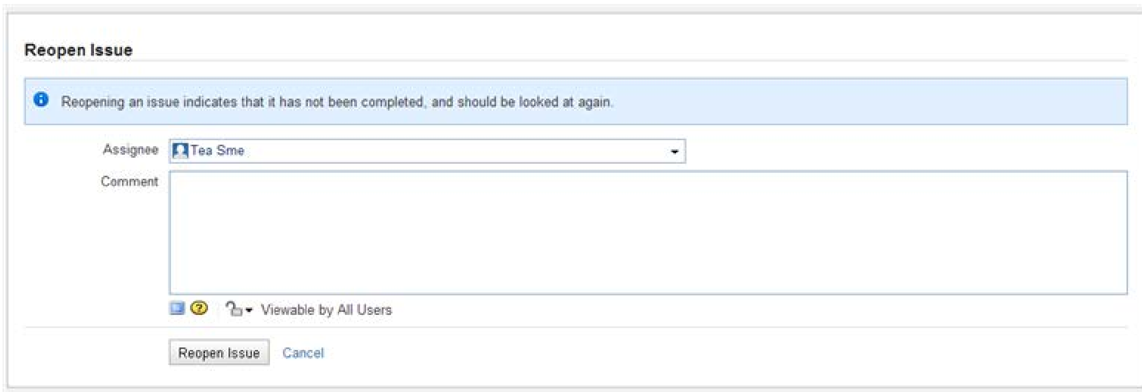
5. Enter any comments needed.

6. Click **Close Issue.**

Reopening an Incident

If an incident needs to be reopened, you can reopen it *if you are Level 3 Support or above.*

1. From **Assigned To Me,** hover the mouse over the incident until the gear and arrow icon appears, click, and select **Reopen Issue.**



2. Leave the **Assignee** set the way it is, or if you wish to assign it to someone else, select the person's user name or begin typing it until it appears in the box and then select it.
3. Type a comment about why you are reopening the incident.
4. Use the lock icon if you wish to restrict who can view the comment.
5. Click **Reopen Issue.** The incident's status changes to **Reopened.**

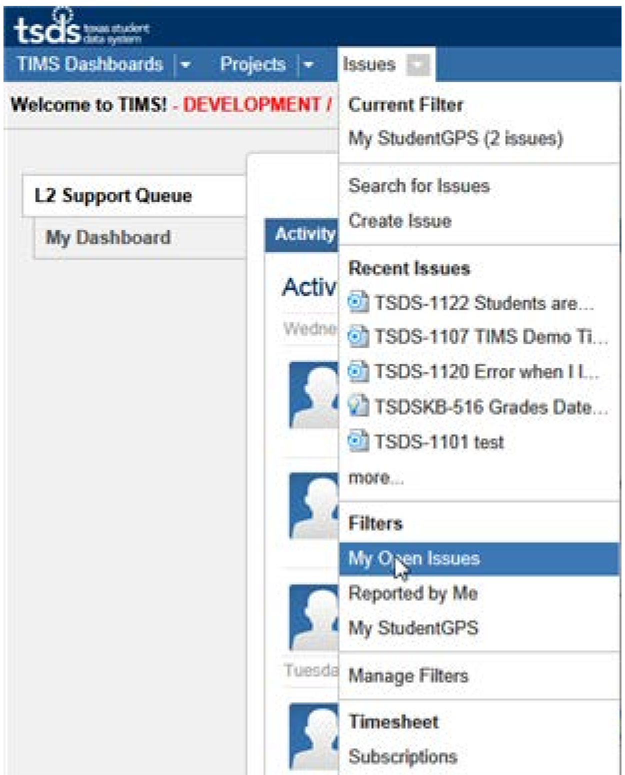
Creating a Filter to Add to Your Dashboard

You can create a filter to add to your dashboard if, for example, you are assigned to a specific application or wish to view incidents of a specific type or level. This procedure is taken in three steps: create a filter, add it to your dashboard, and adjust the dashboard, if desired.

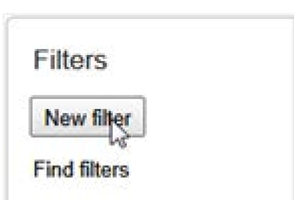
Creating the Filter

Follow these steps to create a filter. In this example, we'll create a filter that shows only the incidents for one application in TSDS.

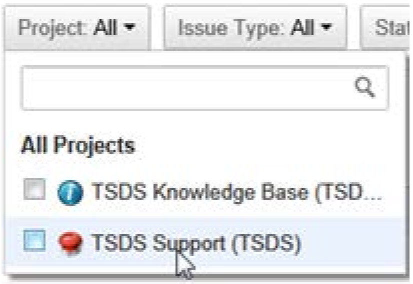
1. From the **Issues** menu, select one of your filters.



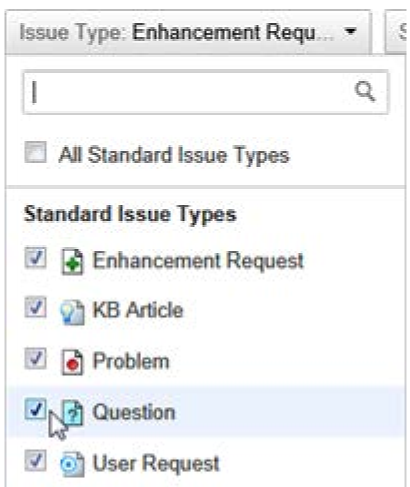
2. Click **New filter.**



3. Select the options that will filter the data the way you want. In this example, we don't want to see the Knowledge Base, so for **Project** we pick **TSDS Support.**

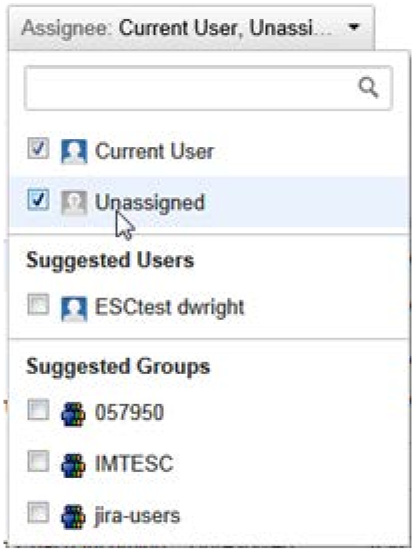


4. For **Issue Type,** check the boxes to select the types of issues. Even if you want to see all, it is better to select each individually than to pick **All Standard Issue Types.**



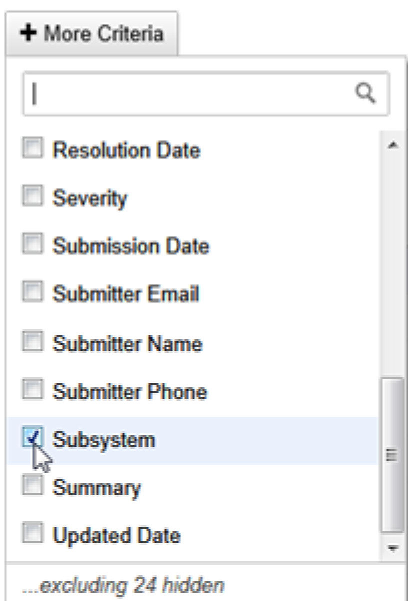
5. For **Status,** check the boxes to select the statuses you wish to view. For the example, we're picking all the level 2 statuses.

6. Make the selections for **Assignee.** In this case we're picking **Current User** and **Unassigned:**

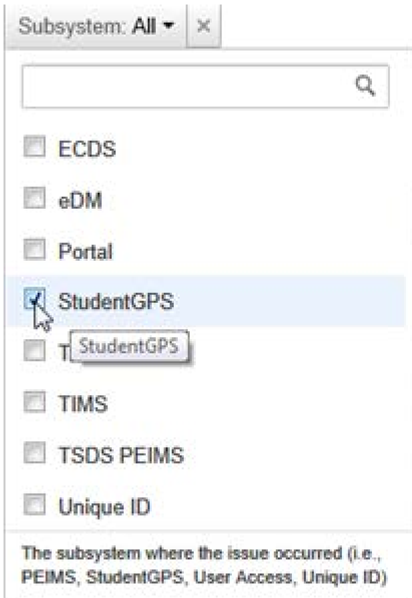


7. To select the application (or some other criteria), click More Criteria:

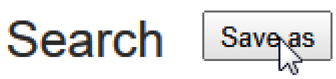
8. Check the appropriate criteria. In this case, we'll select Subsystem.



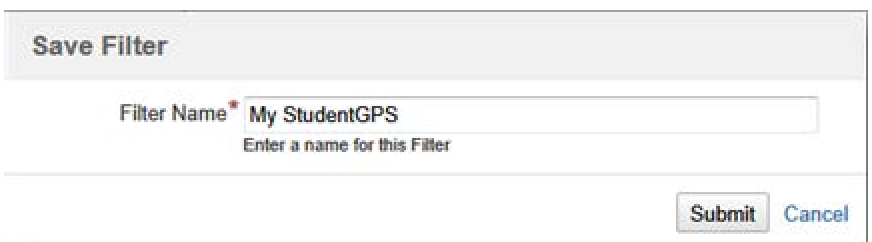
9. A **Subsystem** menu appears. Select the subsystem. In this case we'll pick **StudentGPS:**



10. Once you've selected all the criteria for your filter, click **Save as.**



11. Type a name for the filter:

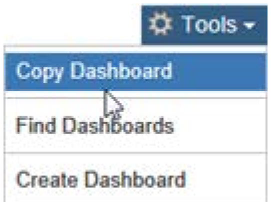


12. Click **Submit.**

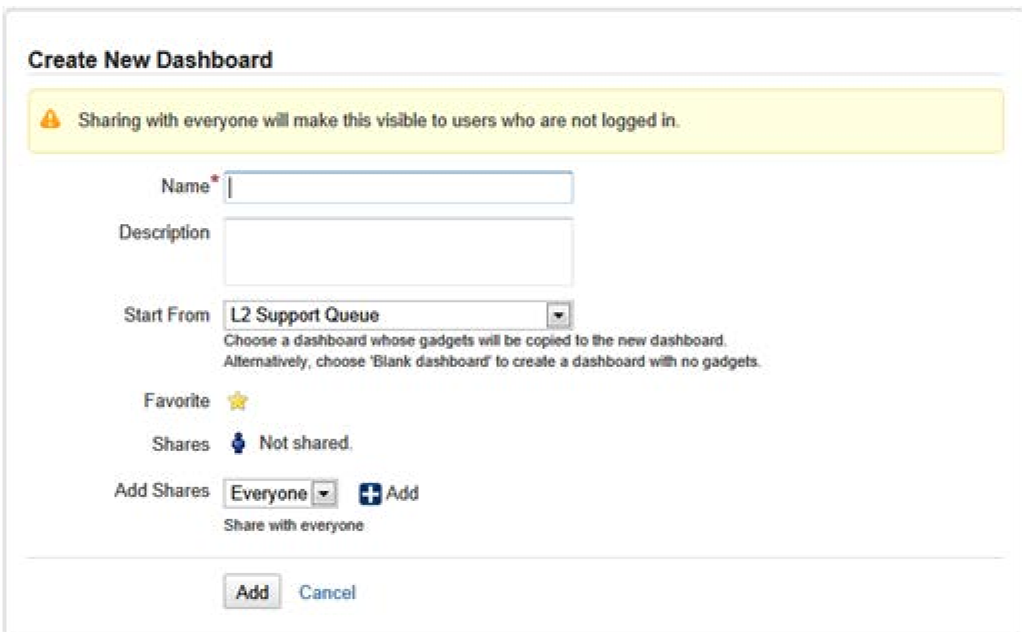
Adding the Filter to Your Dashboard

The dashboards provided with TIMS cannot be edited. So, if you want to modify your dashboard, you must first copy the provided one. Then you can edit the new dashboard as you wish.

1. From your regular dashboard, under **Tools,** select **Copy Dashboard.**



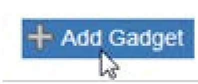
2. Type a name for the new dashboard.



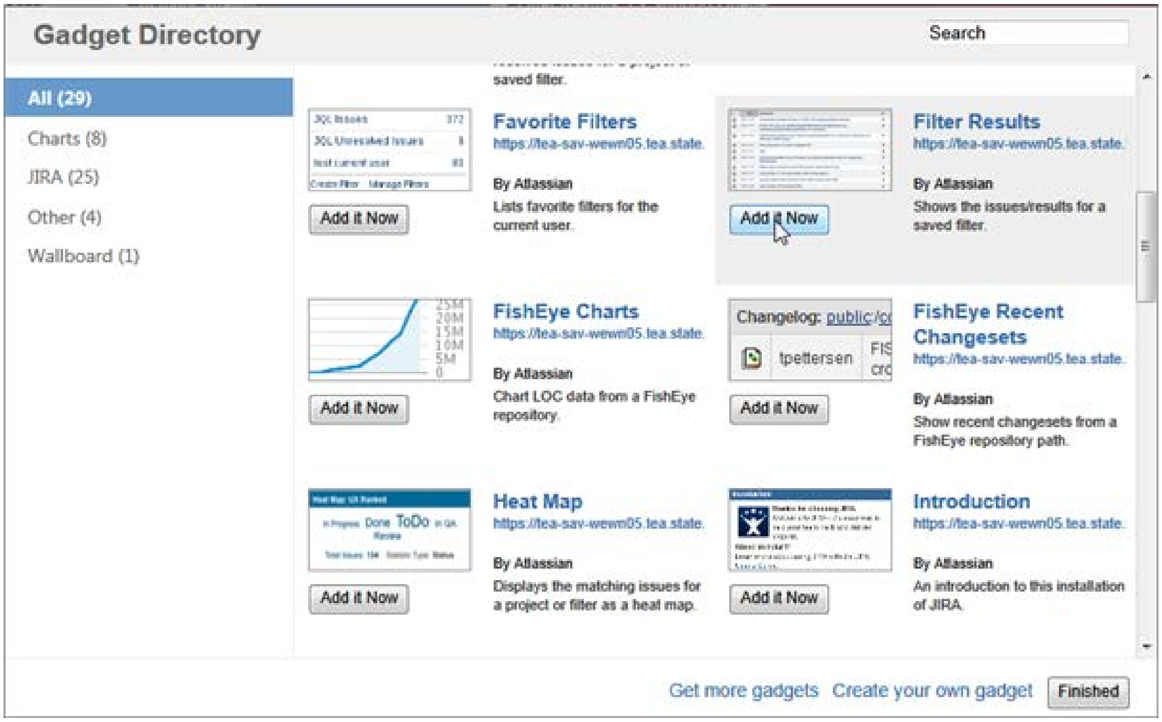
3. You do not need to change any of the other settings, but type a description if you wish.

4. Click **Add.** The system makes a copy with the layout of the old dashboard. Now, you can add the filter that you created to the new dashboard.

5. Click **Add Gadget.**



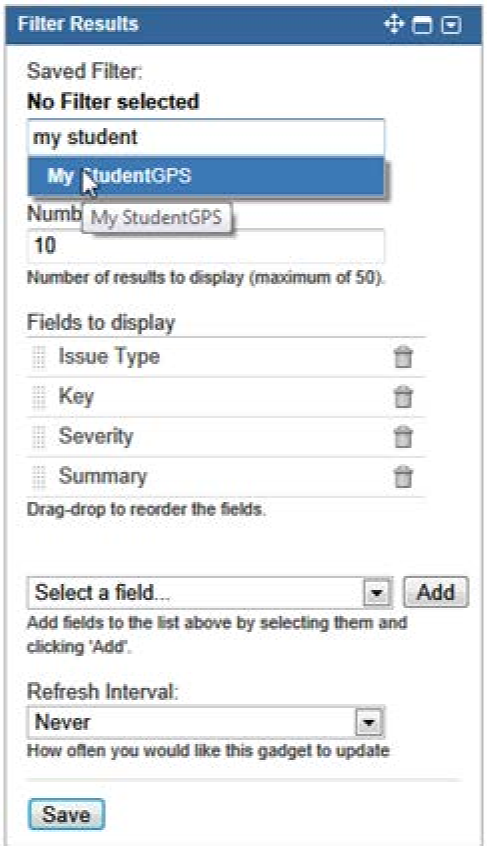
6. The dialog box that appears contains the gadgets available for TIMS. Scroll down and click **Add it Now** for **Filter Results.**



7. A Filter Results pane is added to the top right of your dashboard. Click **Finished.**

8. Now you must select configure the filter.

9. Begin typing the name of the filter and then select it, or use the **Advanced Search** to find it.

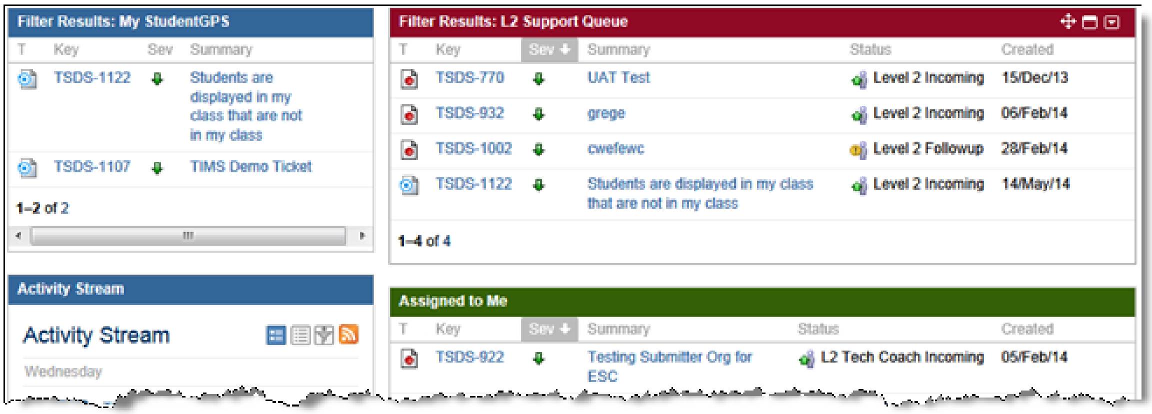


10. Change the number of result fields, if desired.

11. Check the fields that will be displayed. If you want to add a field, select it from the list and click **Add.**

12. Change the Refresh Interval, if desired.

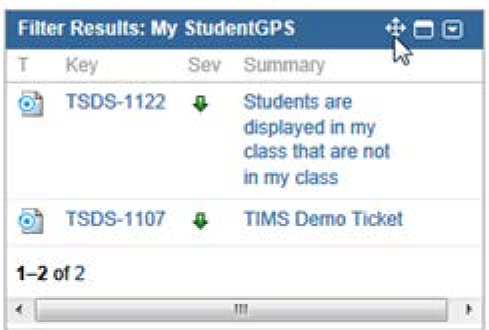
13. Click **Save** to save the filter to the dashboard.



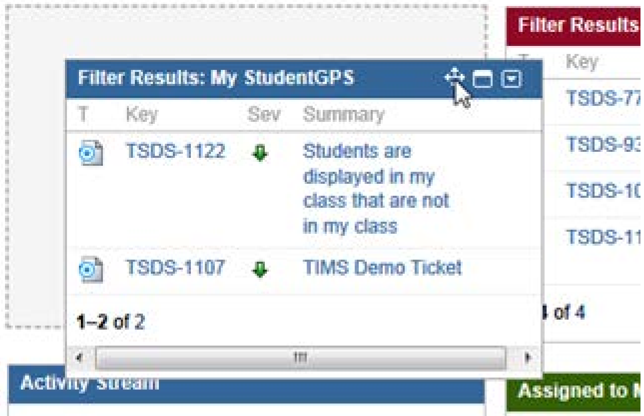
Adjust the Dashboard

If you like where the new dashboard is located, you can leave it there. However, you can also move it. Suppose, in the example above, we want to switch the location of the **L2 Support Queue** and the **My studentGPS** filter.

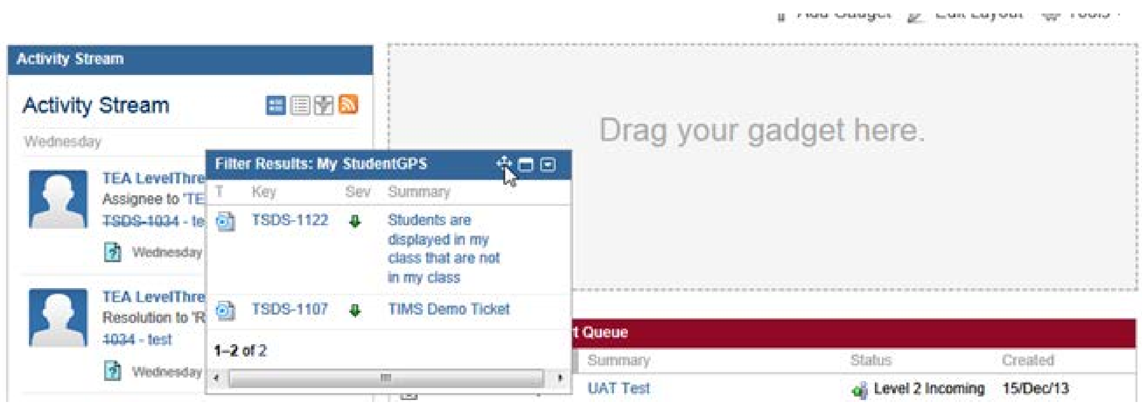
1. Hover the mouse over the gadget to be moved until you see the standard icon for moving things.



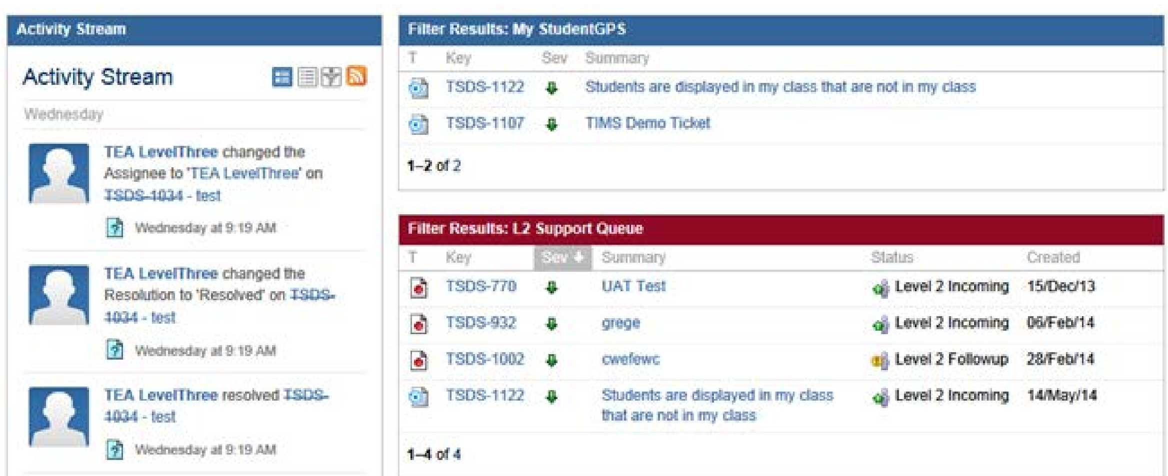
2. Click the icon and drag the gadget to its new position.



3. Once you have it located over a another gadget, a box appears that says **Drag your gadget here.** Drop it over the gadget you want to replace.



4. The new filter is now located at the top of the right column and the **L2 Support Queue** is below it. To move the **L2 Support Queue** to the left column, repeat Steps 2 and 3.

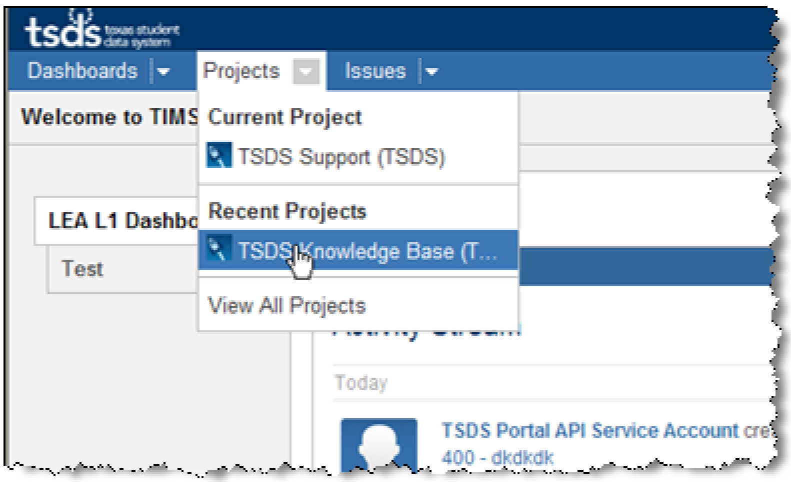


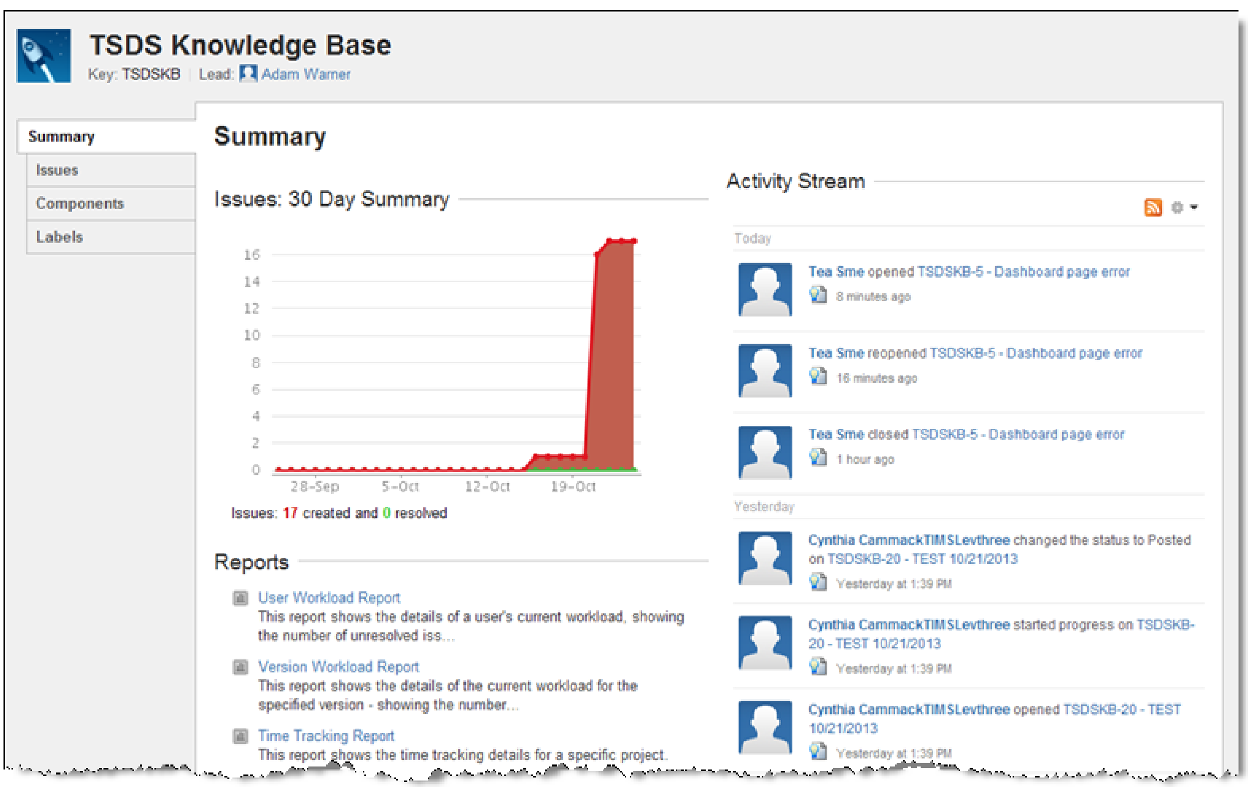
Working with the Knowledge Base

This section is mostly for support people at Level 3 (System Support role in TSDS) who are adding articles to and managing information in the Knowledge Base.

Switching Projects to the Knowledge Base

All levels of support, you can choose to work on the problem queue or to view the Knowledge Base. To switch projects, click **Projects** from the top menu and select the project you wish to work on, or choose to view all projects.





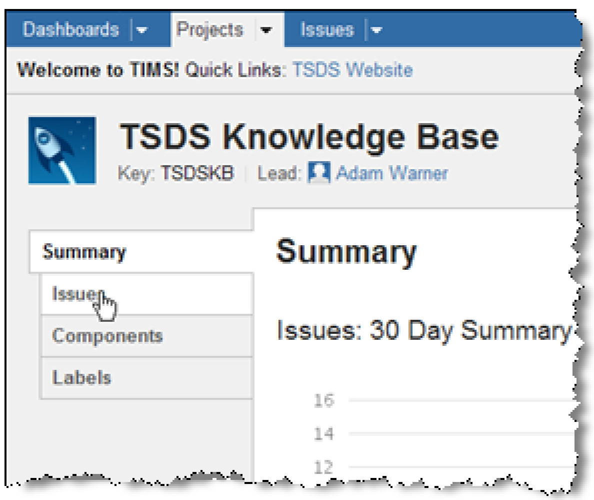
Knowledge Base articles are created and approved using the same processes and views as incident resolution. Once a Knowledge Base article is posted by Level 3 Support, the article's security level is set to Public, making it available to all users.

The Knowledge Base itself provides an overview of activity and access to reports from the system.

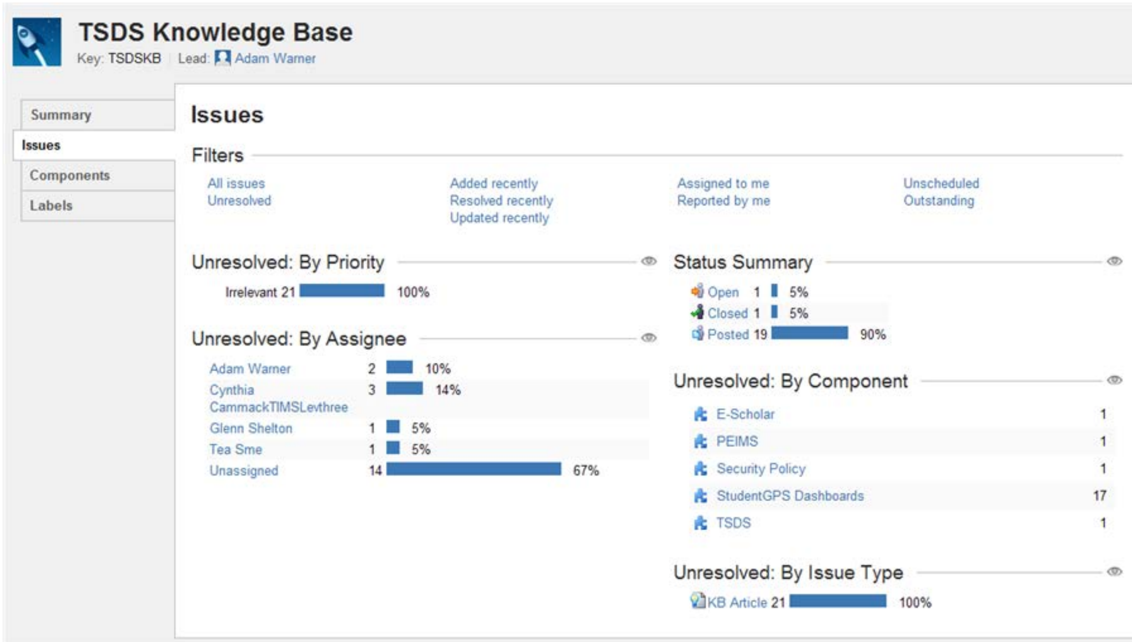
Viewing the Incident Information in the Knowledge Base

Alls level of support can view the incidents in the Knowledge base. The most useful view is as follows:

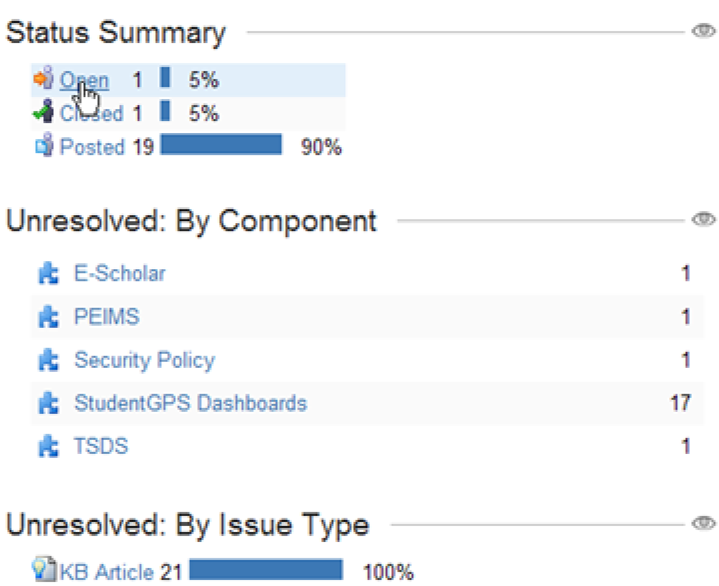
1. Click **Issues.**



A page of graphical displays appears, with a list of filters:



2. To see all open Knowledge Base incidents, click **Open** under **Status Summary.** Otherwise, select another filter that is more appropriate to your needs, for example, your name.



A view of all the incidents for that filter appears:

From this view, you can open the incident by clicking on the link in the **Summary** column.

Posting a Knowledge Base Article

Only Level 3 Support members can post a Knowledge Base article.

1. Open the detail view of the incident either from your queue or from the Knowledge Base views, as instructed in Viewing the Incidents in the Knowledge Base.
2. Make sure that the incident is thoroughly edited to include a good description of the problem and the solution. Below is a template you can use to make sure you include important information:

Knowledge Base Field Descriptions	
Title	Short 1 to 5 word description of the article.
Summary	A brief 1 paragraph account of the main points of the article.
Components	Dropdown box listing the various components related to article (i.e. Unique ID, TSDS, StudentGPS Dashboards)
Description	
Who does it impact?	Levels and/or departments required to know this information.
When is it used?	The ideal time this information can and should be utilized.
Why is it important?	Brief description of overall business impact.
What are the main critical points and/or steps?	Detailed explanation of article subject matter. End to end procedural steps are outlined as appropriate.
Labels	Key words or phrases linking to the articles main idea.

3. Click **Workflow > Post KB Article.**