CNRMCINST 2620.1
Code 200
30 Jun 15

CNRMC INSTRUCTION 2620.1

From: Commander, Navy Regional Maintenance Center

Subj: GUIDANCE AND POLICY FOR CNRMC PRODUCTION ENVIRONMENT
CUSTOMER SERVICE (PECS)

Encl: (1) CNRMC Production Environment Customer Support (PECS)
Manual Vol 2

1. <u>Purpose</u>. To provide guidance on the use of the Production
Environment Customer Support (PECS) tool and standardize the
Information Technology (IT) application trouble reporting while
identifying enhancements to core CNRMC IT systems.

2. <u>Background</u>. PECS was developed to identify and track system
deficiencies within the AIM4RMC suite of systems for the RMCs.
As additional CNRMC Core systems were developed and deployed it
became essential to have a centralized reporting system capable
of tracking and managing trouble ticket reporting and
enhancements. (PECS 2.0 was developed to meet this requirement.)
PECS also eliminate the need for tracking trouble tickets and
problems in multiple systems. It provides the CNRMC IT staff
trouble ticket visibility and application performance across
multiple IT applications and platforms.

3. <u>Scope</u>.   This instruction applies to the following
applications: AIM4RMC, AIM4FDNF, MSE 1.0, NMD, VSB (RMC
Functionality), TASS-INFO, PMT-FIAR, and customers facing
SHAREPOINT issues and GMAS training.

5. <u>Policy</u>. All RMCs shall use enclosure (1) as a standardized
record of practice.

W. J. GALINIS

Distribution:
MARMC, SWRMC, SERMC, FDRMC

CNRMC Production Environment Customer Support (PECS)

Roles and Responsibilities

Commander Navy Regional Maintenance Center (CNRMC)

Version: **2.0**

Date Created: 6/30/2015

"This page is intentionally left blank."

Document Information

Change History

Version/Revision	Date	Change Description	Responsible Individual
2.0	2/28/2015	Initial Draft of Revision	Daniel Kohler
2.0.1	5/5/2015	Edits inputted	Daniel Kohler
2.0.1	5/29/2015	Edited section 5. Changed web address and contact info for Navy 311.	Daniel Kohler
2.0.1	6/30/2015	Removed Draft Status	Mark Prioletti

"This page is intentionally left blank."

Table of Contents

1 Introduction

1.1 Purpose

This document defines the CNRMC Production Environment Customer Support (PECS) IT help desk process, Global Distance Support Center reporting process and user account roles and responsibilities as they apply to Program Management Office IT Help Desk (PMO-ITHD) as Central Help Desk (AIM4RMC/MSE), SPAWAR PMW-150 as Central Help Desk (NMD), Commander Navy Regional Maintenance Command (CNRMC), Commander, US Pacific Fleet (CPF) N43, SURFMEPP, and their subordinate commands (users).

1.2 References

Below is a list of supporting material, industry standards, or examples from other organizations that may help the reader further understand the subject matter:

> 1.2.1 AIM4RMC Service Level Agreement; Dated 10 November 2011 (https://navsea.portal.navy.mil/home/CNRMC/AIM4RMC/AIM4RMC%20SOPs/AIM4RMC%20SLA%20Final%2010%20Nov%2011.docx)
>
> 1.2.2 PECS 2.0 User Guide 1 – Overview and Creating a Production Environment Customer Support (PECS) Ticket
>
> 1.2.3 PECS 2.0 User Guide 2- Escalating a PECS 2.0 to a Tier 1 IT Help Desk
>
> 1.2.4 PECS 2.0 User Guide 3 – Updating a PECS 2.0 Issue
>
> 1.2.5 PECS 2.0 User Guide 4 - Close Out of a PECS 2.0 Issue

1.3 Background

As the RMCs perform core functions in various IT systems (AIM4RMC, AIM4FDNF, NMD, VSB, TASS-INFO, SharePoint, PMT, MSE, and training sites), it is fundamental that the issues experienced by users are recorded in a visible manner so as to correctly manage resources needed to identify, develop, and implement a standard solution across the RMC Enterprise. Another fundamental function of PECS is to prevent the RMC End-User community from overwhelming the Navy's 311 Trouble Reporting System by making multiple redundant or unnecessary issue reports. Support of issues identified by the RMCs will require the coordination and communication between the seven RMCs, CNRMC, multiple Help Desks, Central Design Agencies (CDAs), SPAWAR PMW-150, and the Program Management Office (PMO-IT). The visibility offered by PECS 2.0 allows CNRMC to address enterprise issues vice individual RMC issues. Access to the CNRMC PECS Help Desk Portal is accomplished through a Common Access card (CAC) controlled and registration iNAVSEA Environment is required for ticket submitters and editors.

1.4 Overview

The Local ERP Business Office plays a crucial part in the Help Desk process. They are the first line responders (Tier 0 Help) to end-users and filters for issues sent outside the RMC enterprise for resolution. The ERP Business Office provides over the shoulder support and training to command personnel. They will initiate a trouble ticket in the CNRMC PECS Help Desk Portal (in accordance with Appendix B) for all reported issues and perform an initial evaluation to attempt resolution. If the problem proves to be beyond the capabilities of the Local ERP Business Offices, they will escalate the issue by forwarding the trouble ticket to the appropriate Tier 1 agency via SharePoint Workflow. (See Figure 1)
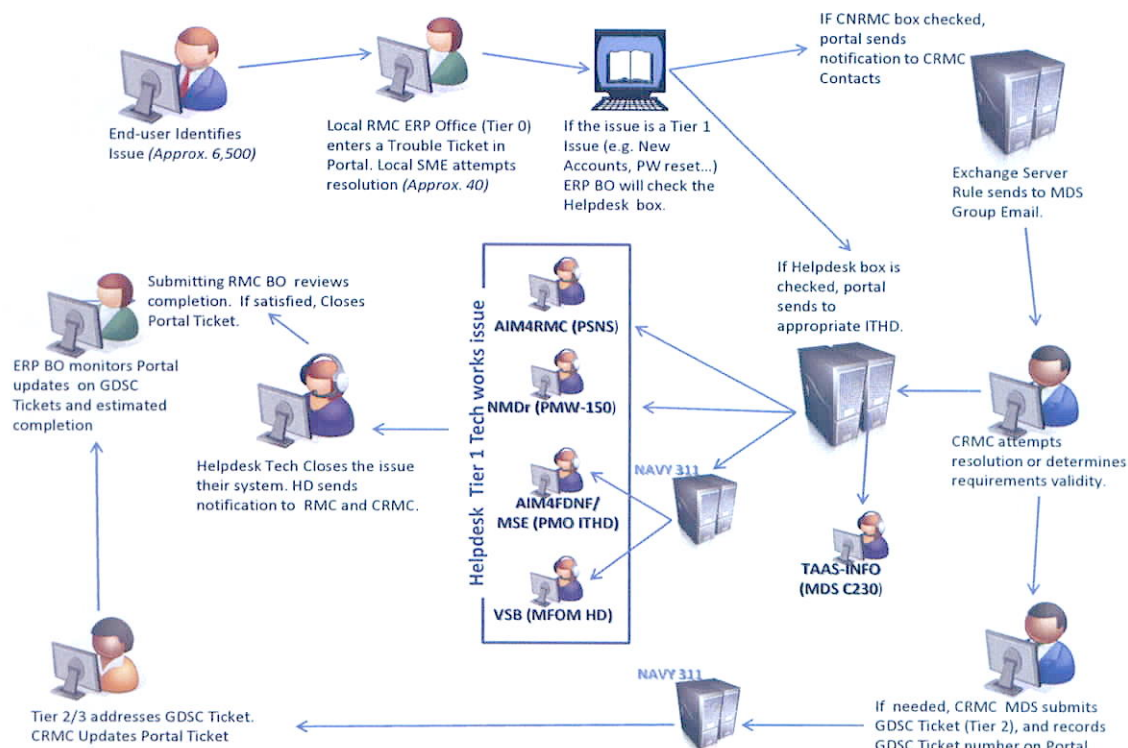
Figure 1

The Business Office Rep will gather and document (create a PECS trouble ticket) as much information as possible to help determine causes and possible avenues for resolving the issue, as well as to help the (if needed) Tier 1 Help Desk technician troubleshoot the issue.

Next, the Business Office Rep will determine if the issue falls under the capabilities of their Local ERP Office, the Tier 1 IT Help Desk (ITHD), or it should be directed to the CNRMC Maintenance Data Systems (MDS) division for action. If the issue requires Tier 1 support, the originating Business Office Rep will check the "IT Help Desk (Tier 1)" box on the ticket. For CNRMC issues, they will check the "CNRMC" box. The Business Office Rep will activate the "Escalate to Tier 1" Workflow, if required.

At that time, the SharePoint Portal will compile and format an email to be sent to the appropriate support gateway for the issue (see Table 1). The gateway will induct the issue and assign it to the responsible ITHD. The ITHD will then address the issue to resolution. If the issue is beyond normal ITHD capability (such as code or configuration changes) it will be forwarded to CNRMC MDS for escalation to the CDA via the Navy311 System. For issues forwarded directly to CNRMC MDS they will review the issue and attempt resolution. If the issue is beyond CNRMC or Tier 1 capabilities, the CNRMC MDS Rep will submit the issue as a NAVY 311 Ticket for Tier 2 resolution by the appropriate CDA via the CDA workflow in SharePoint.

As the issues get resolved, status updates from CNRMC, NAVY 311, and ITHD will be posted (manually) to the CNRMC PECS Help Desk Portal. Once the issue has been placed in "resolved" status and verified to the satisfaction of the submitting RMC, the RMC will close out the ticket on the CNRMC PECS Help Desk Portal.

Table 1
Activities and Gateways for Tier 1 Help Desk Support (by System)

System	Tier 1 Support Activity	Gateway
AIM4RMC	PSNS ITHD	Email to PSNS.ITHelpdesk@navy.mil
AIM4FDNF	PMO-ITHD	Email to Navy 311(navy311@navy.mil)
NMD	SPAWAR PMW-150	Email to Navy 311(navy311@navy.mil)
TASS-INFO	CNRMC MDS	Internal to SharePoint
VSB*	MFOM	Email Navy 311(navy311@navy.mil)
SharePoint	CNRMC MDS	Internal to SharePoint
PMT	CNRMC MDS	Internal to SharePoint

*Issues relating to CNRMC Only.

2 Roles and Responsibilities

2.1 Local ERP Business Offices (Tier 0)

2.1.1 Identify and register personnel who will be authorized to submit tickets to the CNRMC PECS Help Desk Portal.

2.1.2 Maintain memberships and Group Email addresses used in notification/communication workflows.

2.1.3 Perform initial troubleshooting and information gathering for issues.

2.1.4 **Enter trouble tickets, into the CNRMC PECS Help Desk Portal:** https://navsea.portal.navy.mil/field/CNRMC/sd/AIM/SitePages/Home.aspx

2.1.5 Perform initial determination of which activity (ITHD or CNRMC) will address the issue by checking the appropriate box.

2.1.6 Assign priority to the trouble tickets.

2.1.7 Act as the central contact point for all issues being addressed by outside activities.

2.1.8 Enter ITHD Remedy Ticket numbers to their issues on the CNRMC PECS Help Desk Portal.

2.1.9 Update issues with any communications from the ITHD.

2.1.10 Close submitted tickets.

2.2 CNRMC MDS

2.2.1   Develop and maintain functionality of the CNRMC PECS Help Desk Portal. This includes workflows, data elements and communication functions.

2.2.2   Develop and maintain documentation supporting the PECS Help Desk process.

2.2.3   Provide portal access to personnel responsible with submitting/changing/closing of trouble tickets.

2.2.4   Enter ITHD and NAVY 311 provided updates for tickets.

2.2.5   Submit NAVY 311 Trouble Tickets for all RMC Enterprise Maintenance Data System issues requiring CDA escalation.

2.2.6   Provide coordination and oversight of RMC NAVY 311 Tickets.

2.3 Tier 1 ITHD

2.3.1   Accepts requests for issue tickets submitted by the ERP business offices via the CNRMC Portal.

2.3.2   Interface with the Production Portal hosting activity (i.e. NEDC) for all performance issues.

2.3.3   Provide a point of contact (POC) for forwarded trouble tickets from the CNRMC Help Desk Portal.

2.3.4   Develop and maintain internal distribution process for forwarded CNRMC PECS Help Desk Portal trouble tickets.

2.3.5   Review submitted tickets and if needed contact the activity's ERP Business Office Rep for further clarification or additional information.

2.3.6   Provide the assigned ticket number to the submitting RMC and CNRMC.

2.3.7   Provide status updates for portal tickets to CNRMC by emailing status and work log data for identified issues.

2.3.8   Forward un-resolvable trouble tickets to CNRMC for action via email notification.

2.3.9   Notify submitting activity and CNRMC of issue resolution and update the status by emailing either a mass data export file or by individual email.

3 Trouble Ticket Categories, Priorities, Assignment and Status Progression

3.1 Categories of Trouble Tickets

3.1.1 Operations: Software functionality and availability. The sub-categories are:
--Network – Connectivity and responsiveness of the system to the End-User.
--Application - The actual software performing the activities it was coded for.
--Data – Corrupted or missing data based on interfaces or data migration functions
--Printing – Inability to print or to setting up printers.
--Documentation- Written guidance or instructions (User Guides) needing clarification or update.
--Process: Issues dealing Business Processes support of Command mission.
--Training Request: Request from end users for formal or informal training on one of the corporate apps.

3.1.2 User Access: Enabling end users access to systems, application and functions. Sub-categories are:
--Create Account- This is for new application accounts as well as CITRIX accounts.
--Password Reset- When an End User locks their account due to failure to properly enter credentials or systems lockout.
--Role change- The end user requires additional or a change in access in an application they already have access to.
--Assign Project (AIM/MSE only)
-- Disabled Account-end user leaves the command or changes jobs within the command.

3.1.3 New Functionality: Identifying additional functionality as either a new requirement or missing functionality from an application that supports already known requirements. These issues should be assigned to CNRMC for vetting prior to forwarding to the CDA.

3.1.4 Other: For any other issue not covered above.

3.1.5 TAAS-INFO ONLY: This deals with specific centrally managed TAAS-INFO issues.
--Timekeeping
--Add Local 2Kilo
--Modify Query
--Bulk Update
--Batch Print AWRs

3.1.6 Annual Certification Update – MARMC Specific

3.2   Priority Level Description:

3.2.1   Pri.1 - Prevent the accomplishment of an essential capability. Jeopardizes safety, security, or other requirement designated as critical.

3.2.2   Pri. 2 - Adversely affect the accomplishment of an essential capability and no work-around solution is known. Adversely affect technical, cost, or schedule risks to the project or to life cycle support of the system, and no work-around solution is known.

3.2.3   Pri. 3 - Production is hampered but work-around is available. It is possible that this issue can have a negative impact to technical, cost, or schedule.

3.2.4   Pri. 4- A non-mission critical issue that can be filed as a simple annoyance or inconvenience. This issue has no impact to technical, cost, or schedule.

3.2.5   Pri. 5 - Any other impact.

3.3 Trouble Ticket Assignment

3.3.1   Initial routing assignment of trouble tickets will be performed by the submitting activity. While the submitting activity will be the initial assignment of all their issues, by checking the appropriate box (IT Help Desk (Tier 1) or CNRMC) will begin the escalation process. The submitting RMC will then activate the SharePoint Portal Work Flow will automatically generate and transmit a formatted email to the appropriate Tier 1 Help Desk as stated in Table 1 in Section 1.4 of this document.

3.3.2   Issues will be reviewed by the receiving activity. If the issue has been mis-routed then:

   a.   CNRMC mis-routed: CNRMC will edit the trouble ticket by checking the "PMO ITHD" check box, uncheck other boxes, and entering "Submitted to PMO IT" into the work log. CNRMC will then manually initiate the SharePoint workflow "Email" that will send all required information via email to Navy 311 (Navy311@navy.mil) for PMO ITHD assignment. The Subject line of the email should state: "FDNF Rota (FSSA) AIM4RMCTrouble Ticket %Issue Title%".

   b.   ITHD mis-routed: ITHD supervisor will close the assigned Navy 311 ticket and send an email notification to CNRMC and the issue submitter of the closure and reassignment to the CNRMC. CNRMC will correct the PECS ticket to reflect reassignment.

3.4 Status Progression

3.4.1 Setting Ticket Statuses

a. <u>New</u>: This status is the default status on submitted tickets. No change is required by the submitting activity.

b. <u>Assigned</u>: After the ticket is received and reviewed, a RMC Point of Contact (POC) or Local Technician will assigned to the ticket by entering their name in the "Assigned Local RMC" block. (Note: This individual must have an iNAVSEA account since this block is an Active Directory Look Up.) The status can now be changed to "Assigned".

c. <u>Pending</u>: The Local Technician/ITHD/CDA acknowledges receipt of the issue. ITHD acknowledgement will consist of an email sent to the POC in "Assigned Local RMC" block containing an ITHD tracking number (example: INC-588 or SR-4787 (from PSNS); Navy 13708 from Navy 311; GDSC00000578885 from PMO-ITHD). The POC will enter that number into the single line block in the IT Help Desk Notes section of the ticket. The status can now be changed to "Pending".

d. <u>Work In Progress</u>: The Local Technician/ITHD/CDA has started actively working the issue.

e. <u>Awaiting Other – See description field</u>: Issue is waiting for actions outside the ERP Business Office. Amplifying information will be placed in the Description field.

f. <u>Escalated to Tier 1:</u> This status is set when an issue is sent via workflow to the appropriate Tier 1 Help Desk

g. <u>Resolved</u>: The ITHD/CDA has provided a corrective action to the submitting activity and notifies the submitting activity that work is completed.

h. <u>Closed</u>: The submitting activity will select this status if the submitted corrective action satisfies the activity. The submitting activity will enter the closure date into the "Date Closed" field. The submitting activity is normally responsible for closing tickets.

i. <u>Closed-Long Term Issue</u>: If an issue is deemed non-actionable, CNRMC will pass the un-resolved issue to history by selecting this status.

j. <u>Passed to NAVY 311</u>: This indicates that the issue has elevated the NAVY 311 system for assignment to the CDA for action. CNRMC will submit all NAVY 311 Tickets for new development issues. To reduce disruptions to the CDA and IT development team, all CDA NAVY 311 Tickets will be assigned to a CNRMC Representative as the POC.

k. <u>CR Number Assigned</u>: This indicated that the issue has been accepted by the CDA and assigned a Change Request (CR) Number to track the review, estimating, planning and solution development for the issue.

l. <u>Release Assigned</u>: When an issue is assigned to a release for development, testing and released it will be in a "Release Assigned" Status.

3.4.2 Ticket Status Settings (ITHD assigned Trouble Tickets)

a. Tickets escalated to a Tier 1 Help Desk will reflect (when possible) the status sent by the ITHD during an update email. In cases where a clear delineation cannot be determined by CNRMC, the status of the issue will be set to "Escalated to Tier 1".

b. Statuses of "Closed" and "Passed to NAVY 311" are reserved for the RMC and CNRMC to set. If an issue status from the ITHD is reported as "Closed", CNRMC will set the PECS status to "Resolved" by executing the PECS 2.0 Close Out workflow.

4 Application Account Request

All application account requests must go through the local ERP Business Office and forwarded to the ITHD upon approval. The ITHD will only accept account requests from the list of authorized ERP Business Office POCs. Accounts are requested by submitting a request form to the PMO IT or PSNS Help Desk via the PECS.

4.1 External User Access

4.1.1   Access requests for external users will be processed through CNRMC/MDS. An external user is an individual who is part of a stakeholder organization that is outside of the local RMC (for example: SURFMEPP, CNSL, CPF, Surface Ship Planning Yard). Once approved by CNRMC MDS, the account request will be forwarded to the appropriate ITHD for action. Assigned ITHD will then provide user account and grant access to the requested instance/application.

4.2 Network Account Request Process

4.2.1 The network account request is emailed to the appropriate ITHD as per Table 1 in Section 1.4 of this document. The email must be digitally signed by the requesting activities IA appointed representative, and contain the required data as referenced in Figure 2.

Section 1 (Filled out by requesting Command)	
AD Account Name	John Doe
EDIPI	1234567890
Name Prefix (Mr., Mrs., Capt., ect.)	Mr.
First Name	John
Middle Initial	D
Last Name	Doe
Command	CNRMC
Location	Norfolk
Code / Department	MDS 230/ Engineering
Building / Floor	CEP 200 / Second
Comm Phone	757-443-2650
DSN Phone	
Email	John.doe.ctr @ navy . Mil
Job Title	System Integrator
* Nationality	USA
Employee Type (civilian, military, etc.)	Contractor
SAAR-N On File With Command	Yes
IA Training Date	12/1/2014
IA Representative	Digital Signature

* Specific Nationality is considered PII and cannot be entered or stored on PECS

Figure 2 – Required Data Fields

4.2.2 Ensuring that the user meets all requirements for access to US Government IT resources are fulfilled prior to that user being granted access. The digital signature on accompanying email by the requesting activities designated IA representative substantiates that all IA requirements have been satisfied.

4.2.3 The email must contain the following statement: "All IA requirements have been vetted for the requested AIM4RMC network account(s).

4.3 UNIX Account Request Process (AIM4RMC)

4.3.1 UNIX accounts are required for the Cost, PPPP, MAT and PSS applications and will be processed by the PMO/PSNS ITHD personnel as part of the application

account request. The UNIX accounts must be established by PMO/PSNS ITHD personnel and must be in place prior to accessing the requested application.

4.4 AppWorx Account Request Process

4.4.1 Access to reports using AppWorx will require a separate request. These accounts are established by PMO-ITHD personnel. AppWorx accounts will be established for users that require Cost and MAT accounts.

4.5 Application Account Request Process

4.5.1 Roles that are not under the control of the RMCs ERP (refer to Section 2.1) should be requested from PMO ITHD using the application account request.

5 Navy 311 Anchor Desk (Formerly GDSC) Process

5.1 About Navy 311

5.1.1 All new tickets are received by the Global Distance Support Center (GDSC), known as 'Navy 311'. Navy 311 is the single point of entry for all production issues. Navy 311 will be used to report issues related to actions required by the PMO ITHD, the Central Design Agency (CDA) such as Data Maintenance Requests (DMRs), Software Trouble Reports (STRs) or Engineering Change Proposals (ECPs) or Technical Incident Report (TIR).

5.2 Escalate Unresolved Issues

5.2.1 For trouble tickets that cannot be resolved within five business days, or that require business process change, configuration change, or possible new development, the issue will be forwarded to CNRMC who will reassign the ticket to Tier 2 by creating a Navy 311 ticket for resolution. If new functionality is required CNRMC personnel will coordinate the process.

5.3 Navy 311 POC Assignments

5.3.1 To reduce disruptions to the CDA and IT development team, all NAVY 311 Tickets converted from the CNRMC PECS Help Desk Portal will be assigned a CNRMC Representative as the POC.

5.4 Contact Navy311

5.4.1 Support Requests can be submitted to the Anchor Desk by CNRMC following the process detailed on the website. The Navy 311 website can be accessed using the link below.
http://www.navy311.navy.mil

5.4.2 NAVY 311 can also be contacted by phone or email or chat.
Phone: 1-855-NAVY-311 (1-855-628-9311)
DSN 510-NAVY-311 (510-628-9311)
Email: Navy311@navy.mil

5.5 Configuration of Navy311 Request (Non-PMO ITHD issue)

5.5.1 Support Requests submitted for the AIM4RMCs environment must contain 'AIM4RMC – PROD – Application – Brief Issue Title' (e.g. AIM4RMC – PROD – Cost – COARs not populating report) in the subject line so there is no question the item is written against an AIM4RMC production instance, which Application, and brief description of issue. To identify the issue to a specific site, the Site identifier (SERMC, SWRMC, JRMC-Y or FSSA S) information should be identified in the

main description of the problem ticket along with a reference to the CNRMC Trouble Ticket Number. This also ensures the ticket emails submitted to the correct distribution list for review and action.

5.6 View NAVY 311 Request

5.6.1   The link below can be used to view tickets submitted to the NAVY 311. Users must have access to the iNAVSEA website to view tickets.

https://navsea.portal.navy.mil/hq/04/04X/04XP/NSSG/Lists/Application%20Change%20Requests3/Open%20Items.aspx
<https://webmail.east.nmci.navy.mil/exchweb/bin/redir.asp?URL=https://navsea.portal.navy.mil/hq/04/04X/04XP/NSSG/Lists/Application%2520Change%2520Requests3/Open%2520Items.aspx>

Appendices

Appendix A: Application Role Matrix

			PEPM (Project Engineering and Planning Manager) (can modify roles only)	YES	NO	NO
AIMXP (Advance Industrial Management Express)MIMS			System Administrator	YES	YES	YES
			PASS	NO	NO	YES
MRQT (Material Requirements)			SAMR - System Administrator	YES	YES	YES
QDB (Shipyard Query Database)			Oracle DBA	YES	YES	YES
Execution Priorities (EP)			Same as AIM			
Business Objects			Bus. Object Admin	YES	YES	YES

* Database accounts are established by PSNS&IMF

** Unix accounts are established by PSNS&IMF