

**Distance Support**

**Source of Support (SOS) Business Rules**

**Version 3.0**

**May 2012**

## CHANGE LOG

<b>Date</b>	<b>Version</b>	<b>Change Summary</b>
Feb 2007	0.0	Baseline Draft
Feb 2008	1.0	Update reflecting changes made during Business Rules Meeting 23/24 January 2008
Jun 2008	1.0	Signed as baseline
Aug 2009	1.1	Incorporates requirements of ECPs 1-2 and 5-7 approved by the CCB 9 July 2009 and Admin changes BR ADMIN1-3, 5-65 approved by the Pre-CCB 14-15 July 2009
Oct 2009	1.2	Incorporates Administrative changes SD2, SD4, SD6, T2 and ECPs eCRM 0003, SD8 16, & SD8 22-31
Jan 2011	2.0	Incorporates Administrative changes CR 232, 242, & CR 117, and Class I CR 122, CR 228 and CR 110
May 2012	3.0	Incorporates Administrative changes CR 121, CR 145, CR 146, CR 244, CR 246, CR 247, CR 248, and Class I CR 101, CR 109, CR 142, CR 213, CR 217, and CR 231

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## APPENDICES

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## Distance Support Source of Support (SOS) Business Rules

### 1. OVERVIEW

The Distance Support (DS) Program relies upon a recurring and reliable process for managing Support Requests in a timely, effective manner. This process has its genesis in a mutually agreed upon set of business rules governing Program operation. These rules apply to all categories of supported Unit assistance (i.e., maritime/aviation/ground forces, Fleet/infrastructure, sailor/marine, Joint and Special Forces, Continental United States/Outside Continental United States (CONUS/OCONUS)). DS assistance principally provides for equipment (e.g., technical support, maintenance and modernization); people (e.g., training, education and quality-of-life); and, services (e.g., logistics, medical, and other Program Office/IT system/facilities support). Support of naval Nuclear Reactor Plant materiel is specifically excluded.

The term “customer” as used throughout this document principally implies operating forces personnel, and otherwise includes managers and technicians tasked to sustain Fleet readiness and provide mission and quality-of-life services, reservists, family members, contractors and civilians.

This document prescribes business rules within the context of the Distance Support, Customer Relationship Management (DS CRM) system to which they apply. The “DS CRM system” as cited throughout, is a Remedy<sup>®</sup> Action Request (AR), Web services application providing desktop user capabilities and facilitating distributed processing of Support Requests in a Shared Data Environment (SDE) of networked DS Source of Support (SOS) activities. Appendix A provides a technical perspective of the DS CRM.

Proposed changes to this document should be forwarded via e-mail to the DS Business Rules Manager describing the nature of the change, identifying the impacted paragraph(s) and recommending, when practical, specific edits or text modifications. Receipt of all change proposals will be acknowledged by return e-mail. The proposals will then be adjudicated by a Configuration Control Board (CCB). When necessary, change proposals may be referred to a CCB Working Group to propose edits/additions for amendment to the rules. The Working Group will identify options and impacts whenever different, viable courses of action are available for CCB consideration.

The most current version of this document is posted on the N@vy Knowledge Online (NKO) Website at [wwwa.nko.navy.mil](http://wwwa.nko.navy.mil); verify PKI access; go to Public Communities and Learning Center Pages, then Distance Support.

Appendix B lists and defines the acronyms used in this document.

## **2. SUPPORT REQUEST PROCESSING**

### 2.1 Overview

The Global Distance Support Community (GDSC) concept provides for a geographically dispersed but centrally coordinated Tier 1/Tier 2 virtual contact center enabled by advanced DS capabilities and a network of experienced Source of Support (SOS) activities. By incorporating today's best practices for call centers and help desks, the GDSC will consist of fewer, more sophisticated SOS contact centers. Each contact center, or alternatively, a number of related but consolidated contact centers, will serve as a GDSC "hub", primarily aligned to service one of the Functional Areas: Personnel, Equipment, Supply, Training, Ordnance, Medical, Installations/Facilities and NMCI/ERP.

By leveraging DS CRM capabilities, the GDSC will provide effective 24/7/365 support to its customers, including a streamlined process through which Support Requests can be efficiently managed. The GDSC will be the single virtual point of entry for all customers, and for all support issues, able to direct the routing of Support Requests through the use of the SOS Vectory. From the point of inception, through to its completion/closure, the Support Request will be processed and managed within the DS CRM system.

The GDSC will not have Technical Authority for any system or program. The GDSC will have the guidance provided by the respective Technical Authorities to supply answers to customer inquiries when appropriate. Specifically, Tier 1 and Tier 2 personnel manning the GDSC contact centers will have access to a knowledge base containing scripted answers to specific questions.

The DS CRM is the vehicle for:

- Documenting the customer requirement
- Forwarding the requirement to the appropriate SOS
- Reporting completed action
- Generating metrics to evaluate both the timeliness in processing, and the effectiveness in successfully resolving, Support Requests.

This section outlines the standard business rules used throughout the DS infrastructure in processing Support Requests.

Program-wide implementation of the DS CRM system (Logistics Functional Area Manager (LOG FAM) approved; DADMS ID 41381) is ongoing. It is a goal of the DS Program to have all Support Request data recorded in this one, authoritative "Enterprise CRM System" for generation of universal and near real-time, Navy-wide metrics. The single, integrated DS CRM database employs Remedy® AR System, latest DS CRM SDE CCB approved version, commercial off-the-shelf (COTS) software. Procedures contained in this document discuss Support

Request processing, as applies to SOS activities that are DS CRM members with an existing Remedy® application, and (until total integration is achieved) as applies to non-DS CRM members, either with or without existing Remedy® applications. In the latter instance, SOS providers operate contact centers that function using other than the DS CRM software, and/or operate without a direct interface in place with the DS CRM system.

An Enterprise CRM CCB is chartered to ensure that all proposed changes to the DS SOS Business Rules are viable and will not inadvertently impact existing system or subsystem operations. The CCB also serves to promote awareness of, and compliance with, the SOS Business Rules. Voting members of the CCB include the Chairperson and one representative from among each of the following SYSCOMS as listed in the eCRM CCB Charter: NAVSEA, NAVAIR, NAVSUP, SPAWAR, NAVFAC, BUMED, NNWC, USFF, CNIC, PMW240, and BUPERS/OPNAV N1. Voting members will rely on a team of supporting CCB members within each Functional Area who may be consulted to adjudicate proposals to change the policy and procedures contained in this document.

## 2.2 Shared Data Environment (SDE)

A key enabler for the effectiveness of the DS Program is global, Naval Enterprise access to current Support Request information. This capability is being achieved through the creation and ongoing expansion of a collaborative SDE workspace. Under the SDE concept, the GDSC and the SOS activities within the DS network employ the Remedy® CRM software product to share contact center databases, creating a common operating perspective across all support organizations and functional disciplines.

The linking of contact centers is facilitated via servers configured with Distributed Server Option (DSO) software. A diagram depicting the SDE Remedy® DSO forms used within the DS CRM system is provided as Appendix C. A flowchart of SDE Support Request status transactions is provided as Appendix D. These transactions are discussed in detail within section 2.4. A listing of Distance Support SDE Common Data Elements is provided as Appendix E. The data elements required to be input for the DS CRM system to process each of the various status transaction types are described in Appendix F.

Once a Support Request has been documented/created, the associated data will be accessible by all the organizations in the DS network. Non-DS CRM SOS activities will periodically forward a file of common data elements to the GDSC so that their specific Support Request data can be included in the Navy-wide DS metrics.

In addition to Support Request data, the DS CRM system also makes it possible to share data with other programs-of-record (e.g., Maintenance Figure of Merit (MFOM), Navy Enterprise Resource Planning (NERP), et al.).

### 2.2.1 SDE Configuration Management

A “Join CRM Process” is employed to document, evaluate and ultimately host new SOS CRM application functionality (i.e., data element content and unique forms) that is not already contained within the DS CRM system. Join CRM requests will be submitted to the CRM Program Manager for technical evaluation.

The CRM CCB regulates the use and maintenance of the eCRM systems and associated configuration items. The CCB will routinely convene three times a year, in conjunction with SOS business rule workshops. The CCB Chairperson will serve as the CCB facilitator and business coordinator. Proposed business rule changes should be e-mailed to the incumbent serving in this capacity. Proposals should describe the nature of the change, and discuss the potential benefit of implementation. In addition, the DS SOS Business Rules Manager will, at minimum, conduct a semi-annual review of all data elements (listed in Appendix E of the DS SOS Business Rules Document). Proposed changes will be submitted IAW the requirements of this Paragraph.

In any event, no changes to the SDE configuration are authorized until they are brought to the attention of, and approved by, the SDE Manager.

### 2.3 Support Request Submission

The GDSC is the single point of entry for customers seeking assistance. Support Requests may be submitted in a variety of ways, including e-mail, telephone (secure and non-secure), fax, the Distance Support/Anchor Desk Website, “Chat” sessions, Naval message, and customer walk-in. Customer Support Requests will be identified with one tracking number throughout the life of the request. Each activity receiving a request for support is required to validate that the requestor is authorized to receive the information and services requested.

Support Request transactions, as well as the supporting data elements required by the DS CRM system for transaction processing, are detailed in section 2.4.

In particular, paragraph 2.4.1 addresses the creation of a Support Request, and the data elements, identified as “requiring user entry”, that are user-submitted or obtained from initial contact with the customer.

### 2.4 Support Request Status Transactions

An SDE environment Support Request transaction flowchart is provided as Appendix D. Each transaction path is numbered to correspond with Appendix F, which prescribes the data elements required, per each of the potential DS CRM transaction types. Every Support Request processed will pass through five (5) mandatory status transactions: “New”, “Assigned”, “In Progress”, “Recommend Close”, and “Closed”. All transactions are discussed in detail throughout this section.

An SOS provider may be able to resolve a request shortly after initial customer contact. In this instance, the corresponding Support Request may go directly from “New” to “Closed”. Data entries will be backfilled on the Support Request for the other mandatory status transactions (i.e., “Assigned”, “In Progress”, “Recommend Close”).

#### 2.4.1 New (Support Request Creation)

2.4.1.1 Regardless of where the Support Request has its genesis within the GDSC, the Customer Support Professional (CSP) at the servicing contact center will create a Remedy<sup>®</sup> record in the DS CRM system. A tracking number is automatically generated when the transaction is saved in the system and will remain with the record as a means of identifying each individual Support Request for the life of the request. The tracking number will be a total of 15 characters; the first 4 identifying the originating GDSC hub (see Appendix I), and the remaining 11 being a sequential number assigned by the system. When a Support Request is transferred from the originating servicing center to an SOS, or between any DS activities, the gaining activity will not close the existing record to establish a new record in their system. The original Support Request record and identifying tracking number will remain open until the customer accepts the resolution provided by the SOS (refer to Paragraph 2.4.7 Support Request Closure rules).

2.4.1.2 Support Request assistance is rendered via any of the applicable five tiers of Navy DS services (Tier 0 – Tier 4) or a combination thereof; more clearly defined below.

- Tier 0 – Automated systems where customers can obtain basic information through FAQs, web links, online documentation and similar resources or submit simple transaction requests. This tier is self-service, involves only the customer, and requires no other human intervention.
- Tier 1 – Live support where customers can initiate a service request and obtain assistance, including, but not limited to basic information and standard services. Tier 1 support will have end-to-end responsibility for each customer request and provide the customer with a single contact point and call/contact ownership, and provide documentation for visibility and tracking. Tier 1 will only provide information that has been validated and authorized for distribution by the cognizant technical authority. Tier 1 will vector requests to cognizant technical authorities for resolution as identified in the SOS Vectory.
- Tier 2 – Provides more complex support, information, or non-standard services, and is usually an escalation of the call from Tier 1. Tier 2 support provides advanced technical or authoritative expertise to the

customer and provides resolution that will be documented for visibility and tracking.

- Tier 3 – Provides support or information on complex issues including but not limited to hardware or software, which usually involve certified systems engineers or additional levels of specialized or authoritative expertise not available at Tier 1 and 2. Tier 3 support provides more advanced expertise to the customer and provides resolutions that will be documented for visibility and tracking.
- Tier 4 – Support typically required from a government or industry organization, or Original Equipment Manufacturer (OEM) that will be documented for visibility and tracking.

Data elements used to document Support Request information will accommodate all of the DS Functional Areas (see Appendix E). These data elements will record the common Level 1/Level 2 initial contact and response information gathered, as well as the unique elements that vary across the Functional Areas, together serving to record a broad range of information requirements.

2.4.1.3 Support Requests are identified using a two-character “Subject ID” number. A complete list of Subject ID numbers (with their corresponding subject matter areas and common definitions) is provided as Appendix G.

The Subject ID number may be changed between the time that a Support Request passes from Open to Closed status. When it is necessary to change the Subject ID, a corresponding entry will be made in the Work Request portion of applicable Support Request.

2.4.1.4 A “New” Support Request will include data field entries for “Customer Activity Name” and “Customer UIC”. When an entry is selected from the drop-down menu for one of these fields, the system will auto-populate the other of the two fields.

In the event a user cannot find an appropriate drop-down selection, a locally assigned pseudo UIC can be used (e.g., N30001 used by GDSC-T to designate and follow-up on Department of Defense Activity Address Code (DODAAC) assignments for activities not found among the drop-down options). NOTE: The SOS Vectory can also be consulted to help find activity UICs.

2.4.1.5 A "New" Support Request will include an entry in the "When Reported" field. This input provides insight for when an incident (or requirement for assistance/service) was discovered by the customer, as opposed to when the ticket was created in Remedy by the CSP. This shared data element allows SOS providers to monitor how long the problem existed, prior to the Support Request being documented. The contact center CSP will strive to overwrite the "When Reported" field with customer provided testimony (date/time data). Otherwise, the "When Reported" field is programmed with a default setting, matching the "Date/Time Open" of ticket creation.

2.4.1.6 A “New” Support Request, must include an entry for the following mandatory data fields: “Customer First Name”, “Customer Last Name”, “Customer Middle Initial”, “Customer Phone” and “Customer E-mail”. The contact center CSP should attempt to fill all five fields with valid info to allow for future contact, but may enter N/A in the e-mail field if the customer does not have a valid e-mail address. Whenever possible, the contact center CSP should ask the customer for their preferred (more effective) method to be contacted in the future. The customer's preference will be noted on the Support Request.

2.4.1.7 Item Unique Identification (IUID) information will be submitted to the SDE if and when available. Use of IUID was mandated by Office of Secretary of Defense (OSD) policy to track Navy Assets and determine ownership of DOD property.

2.4.1.8 The priority of the Support Request (priorities 1 through 4 apply) will be determined by the customer in keeping with the following criteria:

- Priority 1: Critical safety or damage control item. Required for the performance of the unit’s mission; or, to sustain a bare minimum, acceptable level of human needs and sanitation.
- Priority 2: Extremely important safety or damage control item. Required for the sustained performance of the unit’s mission; to sustain a normal level of basic human needs and sanitation; to maintain the overall integrity of a unit or a system essential to the unit’s mission; or, for a minimum acceptable level of preservation and protection.
- Priority 3: Important safety or damage control item. Required for the efficient performance of the unit’s mission; for normal level of human comfort; for overall integrity of equipment or systems that are not essential, but are required as backups in the event of primary system failure; or, to achieve a minimum acceptable level of appearance.
- Priority 4: Quality of service requests.

2.4.1.9 When processing a “New” Support Request, a SOS Matrix is available to determine the authoritative support provider to provide the requisite assistance. The GDSC will create and immediately transmit a Support Request to the indicated SOS activity for action.

2.4.1.10 A list of the DS CRM data elements required to document a “New” Support Request is provided in Appendix F.

Once all of the data field requirements for a “New” Support Request are completed, i.e., reflecting both the information provided by the customer and

those data elements selectively input into the DS CRM working form, the Support Request can be transmitted into the SDE for receipt and processing by the appropriate SOS.

When a Support Request is in “New” status, the receiving SOS will respond by entering a transaction into the SDE to reflect one of the following status categories: “Assigned”, “Transferred”, or “Cancelled”.

2.4.1.11 Whenever it is determined that a “New” Support Request requires the assistance of a different hub/SOS provider than was initially contacted, or assigned, the Support Request will be documented and/or transferred to the cognizant SOS as indicated by the SOS Matrix. The transfer need not be routed to GDSC Technical, unless the gaining SOS cannot be determined for any reason. The provisions of paragraph 2.4.4 (“Transferred” Support Requests) will be followed.

#### 2.4.2 Assigned (Support Request Acceptance)

2.4.2.1 Once a Support Request has been (verified to be) correctly documented, and is positioned with the appropriate SOS provider, it will be processed with the immediate objective to provide “Assigned” transaction status within 24 hours of initial receipt into the DS CRM system. Specific GDSC contact center goals, corresponding to Support Request priority designations, are noted below. The goals are established to facilitate SOS acceptance (i.e., “Assigned” transaction input) within the 24-hour time limit:

Completed Tier 1/ Tier 2 Processing of “New” Support Requests:

- Priority 1 or 2 Request - two (2) hours.
- Priority 3 or 4 Request - four (4) hours.

Notes: (1) The 24-hour response time pertains to the interval between GDSC receipt of the Support Request and SOS processing of the “Assigned” status transaction.

2.4.2.2 Within the DS CRM system “Assigned” status, registered by the SOS, indicates:

- that the Support Request has been accepted and assigned for action to the appropriate individual(s) within the SOS activity and
- that the customer has been provided the Support Request tracking number. The “Work History” field of the Support Request will be updated to include the name of the individual providing assistance.

If the SOS determines that they are not the appropriate recipient for a Support Request received via the SDE, the Request will be “Transferred” in accordance with paragraph 2.4.4.

Once accepted, the SOS provider will notify the customer within two (2) business days that the case is being acted upon by the SOS provider. Notification will be made via email or auto-notification process. Once notification has been provided to the customer, the SOS will update the ticket status to “In Progress”.

2.4.2.3 A list of DS CRM system data elements required for processing Support Requests into “Assigned” status is provided in Appendix F.

When a Support Request is in “Assigned” status, a transaction by the SOS must be entered into the SDE for one of the following status codes: “In Progress”, “Long Term Issue” (LTI), “Transferred” or “Cancelled”.

#### 2.4.3 In Progress (Support Request Action/Status Processing)

2.4.3.1 When the service/assistance provider(s) at the SOS takes ownership for an “Assigned” Support Request, they will place it into “In Progress” status, indicating their responsibility for, and commencement of, actions to address the Support Request.

2.4.3.2 SOS providers will update Support Request status on a "when warranted" basis until all required actions are completed. Updates will be recorded in the "Work History" data field. A Work History update can be entered by an SOS provider other than the assigned individual. All Work History entries will be automatically date/time stamped.

“Touch Time” labor spent in the work flow processing of Support Requests will be documented by the servicing CSPs and SOS providers. This principally includes the administrative time involved with ticket documentation and notifications, as well as the hands-on time necessary to come up with a “Recommend Close” SOS resolution. “Touch Time” data will be maintained in the SDE by the reported number of minutes.

2.4.3.3 Estimated Completion Date (ECD) is a date field when the SOS provider expects a solution to the customer’s request. An ECD should be entered for Support Requests in "In Progress" status. (Note: Mandatory use of ECD field for Support Requests with status “LTI” is addressed in paragraph 2.4.5.1)

2.4.3.4 Type of Assistance is utilized by the SOS provider to define how assistance was rendered to the customer.

- Onsite - Anytime assistance is rendered by the SOS provider having to be physically present where the problem or question originated and was not initiated as a DS type of assist.

- DS (remote) - Anytime assistance can be rendered without requiring the physical presence of the SOS provider and was not initiated as an Onsite type of assist.
- Transition - Anytime assistance is provided initially by Onsite or DS and during the process of the assistance becomes the other before final resolution is rendered.

Types of Assist can also be found in Appendix E.

2.4.3.5 A list of DS CRM system data elements required for processing Support Requests into “In Progress” status is provided in Appendix F.

When a Support Request is in “In Progress” status, a transaction by the SOS must be entered into the SDE for one of the following status codes: “Recommend Close”, “Long Term Issue” (LTI), “Transferred” or “Cancelled”.

#### 2.4.4 Transferred (Support Request Re-Assignment)

2.4.4.1 When the SOS determines that a Support Request has been received in error, or they are not the appropriate activity to work a particular Support Request, they will refer it on to a different SOS, using the SOS Matrix if needed as a reference. The transfer need not be routed through GDSC Technical, unless the “transfer to” SOS cannot be determined for any reason. The “gaining” SOS will update the Support Request status to maintain its accountability and document all subsequent actions taken.

2.4.4.2 The transferring SOS will enter a remark into the “Work History” field documenting that need to transfer the Support Request. In addition, and when the proper “transfer to” SOS cannot be determined with any certainty, the “Work History” field will be used to document recommendations, if any, for which SOS could possibly provide better assistance.

2.4.4.3 A list of DS CRM system data elements required for processing Support Requests into “Transferred” status is provided in Appendix F.

When a Support Request is in “Transferred” status, a transaction by the “gaining” SOS, or, when necessary, GDSC Technical, must then be entered into the SDE for “New” status.

#### 2.4.5 Long Term Issue (LTI)

2.4.5.1 LTI Status Code will be used when a Support Request will require 90 or more days to complete. Examples include, but are not limited to, long lead-time for parts, programming or coding changes to an application, or a solution requiring additional funding.

When a Support Request is placed in LTI status, both the LTI Code and the ECD fields will also be filled. The LTI Code indicates the reason that the Support Request is being placed in an LTI status; the ECD provides an expected date that the Support Request will be resolved or completed. Once the Long Term Issue Code (Reason) has been entered, it will not be removed from the Support Request, as the ticket moves from LTI to any other status.

SOS providers are responsible for updating the ECDs until resolution of the request is complete.

Support Requests with a lead time less than 90 days may utilize the ECD field without setting the status code to LTI.

2.4.5.2 LTI Codes are identified as:

- Awaiting Platform Availability
- Awaiting Software Upgrade
- Awaiting Technical Personnel
- Awaiting Technical Solution
- Documentation
- Funding
- Operational Sequencing System (OSS)
- Other
- Parts
- System/Equipment no longer supported
- Test Equipment
- Training

LTI Codes can also be found in Appendix E. Additionally, DS CRM system data elements required for processing Support Requests in “LTI Status” are provided in Appendix F.

#### 2.4.6 Recommend Close (SOS Resolution Sent)

2.4.6.1 The SOS will forward proposed completion actions to the customer via the most appropriate means (e.g., telephone, e-mail, “Chat” session, naval message, etc.) and the SOS will document the Support Request with details of the assistance proffered. A sufficient level of detail will be provided for the customer to determine whether the proffered solution effectively satisfies the initial Support Request requirement. When these actions are completed, the SOS will place the Support Request into “Recommend Close” status.

2.4.6.2 Tacit Approval provides the customer with a 2-week window to notify the SOS that their request has been resolved to the customer’s satisfaction. During the 2-week timeframe, ticket status remains in “Recommend Close” status. If the customer's response indicates that the resolution provided by the SOS did not resolve their issue, ticket status will be changed to “In Progress” while the SOS

continues to find/develop/provide a solution. When the customer responds that they are satisfied, ticket status is changed to "Closed". If the customer does not respond within the 2 weeks, ticket status will automatically be changed to "Closed".

2.4.6.3 A list of DS CRM data elements required for processing Support Requests into "Recommend Close" status is provided at Appendix F.

When a Support Request is in "Recommend Close" status, a transaction by the SOS must be entered into the SDE for one of the following status codes: "Closed", "In Progress", or "Cancelled".

2.4.6.4 The customer is responsible for reviewing the completion action/recommended closure status posted by the SOS.

If the completion action/recommended closure status is not acceptable to the customer, a note to this effect must be documented by the SOS in the Support Request "Work History" field.

2.4.6.5 If the customer rejects the proposed completion actions/recommended closure status, the SOS will reinstate the Support Request to "In Progress" status, document the scenario in "Work History", and take appropriate action to resolve the issue.

Once the Support Request has been returned to "In Progress" and if the SOS determines that the additional information provided by the customer warrants assignment of the Support Request to another activity, they will follow the "Transferred" procedures specified in paragraph 2.4.4.

In the situation where a Support Request cannot be resolved and/or the customer disagrees with the recommended actions/information, the need for escalation will be determined on a case-by-case basis, via the normal chain-of-command. Once the Support Request is properly resolved, the SOS will document the resolution on the Support Request in the "Work History" data field.

2.4.6.6 Routinely, the CSP at any of the various networked GDSC contact centers will try to resolve Customer Support issues in coordination with the Point of Contact (POC) specified in the SOS matrix. If the POC is incapable, or not helpful in working the Support Request, the CSP will escalate the matter through their supervisor to the contact center Government Representative. The Government Representative will then contact the DS Advocate at the SOS activity. The DS Advocate is responsible for locating the technician/subject matter expert/source of information within their organization to successfully service the Support Request.

#### 2.4.7 Closed (Support Request Closure)

2.4.7.1 The SOS is responsible for entering “Recommend Close” status on the Support Request. If the customer indicates that the SOS response is acceptable for closure, or does not respond within two weeks after the solution has been provided, the SOS will close the Support Request.

2.4.7.2 If the customer concurs with the Support Request resolution, an entry should be documented by the SOS in the “Work History” field.

Also, if the customer concurs, a Support Request can immediately be processed from “New” to “Closed” status, providing that all terms of the assistance required have been fulfilled and no follow-on support is necessary.

2.4.7.3 A list of DS CRM system data elements required for processing Support Requests into “Closed” status is provided at Appendix F.

Support Requests may be placed in “Re-opened” status after having been “Closed”, in accordance with paragraph 2.4.8.

#### 2.4.8 Reopened Support Requests

Whenever Support Requests are “Re-opened”, the reason for doing so must be documented by the SOS in the “Work History” field.

A list of DS CRM system data elements required for processing Support Requests into “Re-opened” status is available at Appendix F.

When a Support Request is in “Re-opened” status, a transaction by the SOS must then be entered into the SDE for “In Progress” status.

#### 2.4.9 Cancelled Support Requests

When Support Requests are cancelled, the reason for doing so must be documented by the SOS in the “Work History” field; under no circumstance is the Support Request to be deleted from the DS CRM system.

A list of DS CRM system data elements required for processing Support Requests into “Cancelled” status is available at Appendix F.

#### 2.4.10 Deletion of Support Request Records

Under no conditions will Support Requests be deleted. In rare instances, the SDE Manager may approve and monitor the deletion of Requests, e.g., Support Requests input for testing purposes, or when DS CRM aberrations inadvertently create/replicate Request records.

## 2.5 Reports

GDSC Technical will prepare an "Exception Report" for submission to each of the DS Functional Area leads, and the DS Advocate at each of the SOS provider sites. This report will be tailored by the respective SOS provider to report all applicable Support Requests which:

- Have been open for more than two weeks without status update
- Are past ECD and not "Closed"
- Are "Long Term Issue" Support Requests past ECD

SOS management will use this exception report as a tool to ensure timely action is taken on all of the corresponding Support Requests.

## 2.6 Customer Follow-up

The DS CRM system and SDE enable the GDSC to gauge customer satisfaction with DS responsiveness by sending out automated e-mail follow-ups to each Support Request. Results of this customer satisfaction survey will only be distributed to the DS Program Manager, the DS Advocates, or the central POC at the SOS activity that provided assistance or information. This survey complements the SOS responsibility, and does not in any way substitute for, the need to solicit feedback from the customer to close out any individual Support Requests.

### 2.6.1 Customer Satisfaction Surveys

Federated activities connected to the SDE that conduct customer satisfaction surveys using the established DS customer satisfaction survey questions and scoring methodology shall replicate the following information to the eCRM: The customer score value for each question, customer comments (if any) for each customer satisfaction survey response, the customer satisfaction survey submission date, and an auto-generated customer satisfaction survey number along with the corresponding Support Request number.

## **3. TECHNICAL ASSISTANCE REQUESTS**

### 3.1. Rationale

Distance Support has prescribed a specific process for handling technical assistance requests. This follows guidance in the Joint Fleet Maintenance Manual (JFMM) and the Surface Warfare Enterprise (SWE) Future Readiness Team (FRT). It may be updated as needed to meet the needs of the Fleet Maintenance Community.

## 3.2 Technical Assistance Definition

Fleet Technical Assistance (FTA) is the help that surface ships, aircraft carriers, submarines and craft request when they are unable to resolve equipment or software deficiencies using their own ship's resources or other means available within their Strike Group. Use of Regional Maintenance Center (RMC) or RMC-obtained resources for other purposes, such as assessments, Board of Inspection and Survey inspections, etc., is not considered FTA. (JFFM, Volume VI, Section 2, Paragraph 2.2)

### 3.2.1 Exclusions

1. Paragraph 2.4.2 of Chapter 2, Volume VI of the JFMM lists FTA program exclusion items:
  - Naval Sea Systems Command (NAVSEA) 08 cognizant equipment.
  - TRIDENT missile weapons systems.
  - Aircraft.
  - Catapults and arresting gear - Aircraft Launch and Recovery Equipment.
  - Ordnance and munitions.
  - Submarine Safety systems/components.
  - Nuclear weapons.
  - Special clearance equipment.
  - Undersea and land-based surveillance equipment.
  - Flight deck certification related systems and equipment.
  - Diver life support systems.
  - Non-Program of Record (pre-prototype) programs.
2. The following items are excluded from this technical assistance process but must still be documented in the eCRM.
  - Self-help available through blogs, wikis or other similar sources.
  - Remote monitoring issues where the RMC does not have the capability for resolution of the problem.
  - Issues discussed and resolved through monitoring of chat or battle exercises.
  - Warranty or pre-System Operating Verification Testing (SOVT) issues.
  - Any technical issue that is resolved in 15 minutes or less.

## 3.3 Routing Technical Assistance Requests

Any request for technical assistance that involves troubleshooting and repairing faulty equipment or ship's maintenance must first be routed to the RMC. Each

RMC has an area of responsibility (AOR) and is responsible for work from all ships within that AOR. If the RMC is unable to service the request due to capacity or capability constraints, it may pass that request to another RMC or to the cognizant In-Service Engineering Agent (ISEA). When a Support Request is passed, the RMC will:

- Determine who the support provider will be.
- Negotiate and approve the cost of the assist (if required).
- Fund the assist (if required).
- Route the request to the chosen support provider by transferring the request to the GDSC with instructions as to who should receive it, as described in section 3.5 of this document.

Requests for technical assistance relative to design, operation, and/or the Integrated Logistics Support Plan that are not directly related to corrective maintenance, lifecycle maintenance, and/or the need for technical authority, must first be routed to the cognizant ISEA. The cognizant ISEA is determined by using SOS Vectory as the primary reference.

#### 3.4 Single point of entry

The GDSC (Technical) (GDSC (T)) is the initial entry point for all technical assistance requests. Upon receipt of a technical assistance request, GDSC will route the request to the appropriate first responder.

- Each request shall be documented in the eCRM system.
- Requests that are routed to the RMCs must contain a Job Control Number (JCN). These requests shall be documented in the Automated Work Notification (AWN) program, which will assign a JCN if the ship has not already done so. A data link between AWN and the eCRM insures that the request will also be documented in the eCRM. Updates to the request may be documented in either system as the data link will post updates to both.
- Requests routed to an ISEA should also contain a JCN. The ISEA is responsible for requesting the JCN from the ship. These requests will be documented directly into the eCRM. After determining the appropriate ISEA, the GDSC will route the request via notification through the eCRM. Those ISEAs on the SDE will receive the case directly. Those not on the SDE will receive a notification of the request and will keep the GDSC informed of progress so the GDSC can properly document the Work History.

### 3.5 Transfer to another source of support

Any transfer of responsibility for a request will be transferred through the eCRM. Organizations that have the ability to transfer directly through the eCRM may do so. Organizations without the ability to transfer directly through the eCRM will transfer by returning the original request to the GDSC with instructions as to where the request shall be routed. The GDSC will use the rules in section 3.4 to route the request. DS Business Rules section 2.4.4 also applies.

### 3.6 Documentation

All documentation concerning work progress and results shall be entered by the organization assigned the request so that visibility of progress may be maintained. Those organizations who cannot directly document may keep the GDSC informed via e-mail or telephone and the GDSC will enter the documentation into the eCRM.

Each organization must track and report the number of hours worked (touch time) by that organization on each technical assistance request. The goal of collecting this information is to track tech assist costs. Costs will be determined by using touch time multiplied by average labor rates and published in an annual white paper. Average rates will be published for ship's force, call center, RMC, and ISEA activity. In addition, depending on contractual requirements, average rates for OEM or depot-level repair will be included.

#### 3.6.1 Required information

The following data elements are required to be documented in the eCRM on all tech assist requests:

- Customer POC
- Customer Activity Name
- Customer Phone and Customer E-Mail address
- Customer UIC
- Problem Subject
- Problem Description
- Work History
- Problem Resolution Summary (if resolved).
- Subject ID Pre
- Status
- Priority
- Method of Request
- Long Term Issue Code (if applicable)
- ECD (if Long Term Issue is indicated)

- SOS Activity
- Type of Assist

### 3.6.2 Subject ID Pre Coding

The Subject ID Pre will be coded as H/W or S/W Tech Assist.

### 3.7 Response Guidelines

- The ship must be contacted within 24 hours (excluding weekends and holidays) after the initial request is received by the organization assigned to the Support Request.
- Subsequent assignments of the request must likewise be responded to within 24 hours (excluding weekends and holidays).
- Priority 1 and 2 (as defined in JFMM Vol. VI, Chapter 2, Paragraph 2.4.4.2) requests must be acknowledged within 2 hours of receipt by the assigned SOS.
- Technical assistance requests are not normally expected to take an RMC more than 60 days to resolve. Long term issues (LTI) that take more than 60 days to resolve will be flagged to enter a cause code assignment (for example: awaiting parts, ship availability, awaiting at-sea op-test, technical availability, awaiting aloft time, ship returning from deployment, late turn on, maintenance funds management).
- Business rules for Ballistic Missile Defense (BMD) ships will be aligned to future Navy and DOD policy as they are established.

### 3.8 Applicability of other DS Business Rules

All other DS Business rules as to handling, documenting, follow-up, and case status, as contained earlier in this document, apply to the handling of technical assistance requests.

### 3.9 Process monitoring and revision

This process and its associated documented requests will be monitored to determine needed course corrections. In addition, the technical assistance process will be monitored for future extraction from the process of requests that do not need to be reviewed by the RMC first. The intention is to maximize the efficiency of the technical assistance process, which requires an iterative approach.

#### **4. REMEDY INSTALLATION AND TESTING**

The SDE Manager will coordinate network installation and implementation as SOS activities are added into the SDE. Installation provides the forms and functionality as discussed throughout this document.

Tailored support will be provided to facilitate any special requirements at an SOS activity, including unique data mapping.

A formal test will be performed to verify full network functionality for forms, data mapping, status, and update transactions. A test document will be signed by the SDE technicians and SOS activity personnel to certify successful test completion.

The SDE Requirements Test form is provided as Appendix H.

## **Appendix A: Distance Support CRM Technical Specifications**

The following Remedy development standards will apply for each application to be hosted or developed on the CRM:

### **System Forms**

System forms should not be modified. All Remedy applications use the same common, "Out of the Box" (OTB), System forms as templates. Two of these, the User and Group forms, are critical to the operation of any application. Modifications to the User and/or Group forms can adversely affect all Remedy applications operating on the same server.

Any modification to the System forms must be reviewed for merit. The CCB shall review any modifications to System forms. If the modification adds value to the form, and would add value to ALL applications as well, it may be determined to have merit and may be allowed to remain. If the modification does not add value to ALL applications, it will be determined to not have merit, and will not be allowed on the CRM.

### **Group forms**

A single Group form resides on the Remedy server. All Group Names and Group Identifications (IDs) for all applications hosted populate this form. Therefore, it is important that the Group names, IDs and related workflow do not conflict.

Group Names and Group IDs shall not conflict with those in the Global Distance Support Center (GDSC) application. Group Names and IDs in the application to be hosted will be compared to those in the GDSC application. If there is a conflict, the hosted application must be modified.

Group Names and Group IDs shall not conflict with those in applications already resident on the CRM server. Group Names and IDs in the application to be hosted will be compared to those in the applications already resident. If there is a conflict, the non-resident application must be modified.

### **Performance**

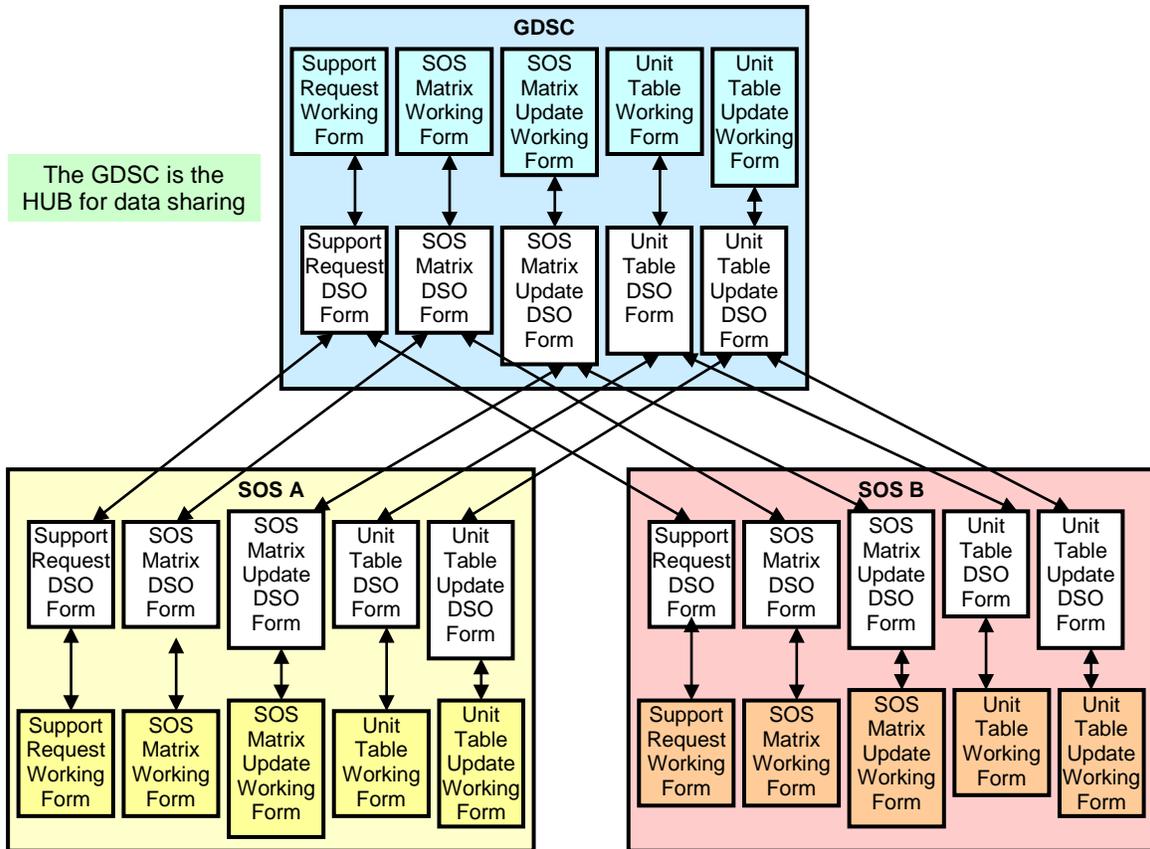
Each application to be hosted will be reviewed for the following performance issues: excessive indexing, very large fields, numerous active links employed, Query by Example (QBE) set to "Anywhere", and remnants of having been developed in an early version of Remedy. All of these can affect performance of the application and, subsequently, the database.

## Appendix B: Acronym List

3M	Maintenance and Material Management (System)
ACR	Allowance Change Request
AOR	Area of Responsibility
APL	Allowance Parts List
AR	Action Request (Remedy <sup>®</sup> AR System)
ARS	Action Request System
AWN	Automated Work Notification
CASREP	Casualty Report
CCB	Configuration Control Board
CONUS	Continental United States
COSAL	Coordinated Shipboard Allowance List
COTS	Commercial Off the Shelf
CRM	Customer Relationship Management
CSP	Customer Support Professional
CSWG	Customer Support Working Group
DADMS	DON Application and Database Management System
DS	Distance Support
DS CRM	Distance Support Customer Relationship Management
DSO	Distributed Server Option
DTG	Date Time Group (Message)
DODAAC	Department of Defense Activity Address Code
eCRM	Enterprise CRM (System)
ECD	Estimated Completion Date
EIC	Equipment Identification Code
FCFBR	Fleet COSAL Feedback Report
FISC	Fleet and Industrial Supply Center
FMS	Foreign Military Sales
FRT	Future Readiness Team
FTA	Fleet Technical Assistance
GDSC	Global Distance Support Community
H/W	Hardware
IAW	In Accordance With
ISEA	In Service Engineering Agent
IUID	Item Unique Identification
JCN	Job Control Number
JFMM	Joint Fleet Maintenance Manual
LOG FAM	Logistics Functional Area Manager
LTI	Long Term Issue
MFOM	Maintenance Figure Of Merit
NAVSEA	Naval Sea Systems Command
NEMAIS	Navy Enterprise Maintenance Automated Information System
NERP	Navy Enterprise Resource Planning
NIPR	Non-Classified Internet Protocol

OCONUS	Outside Continental United States
OEM	Original Equipment Manufacturer
OSS	Operational Sequencing System
OTB	Out-of-the-Box
PMS	Preventive Maintenance System
POC	Point Of Contact
QBE	Query By Example
QDR	Quality Deficiency Report
QOL	Quality Of Life
RIC	Repairable Identification Code
RMC	Regional Maintenance Center
SDE	Shared Data Environment
SIPRNET	Secret Internet Protocol Router Network
SOS	Source Of Support
SOS CRM	Source Of Support Customer Relationship Management
SOVT	System Operation Verification Testing
S/W	Software
TFBR	Technical Feedback Report
TMDR	Technical Manual Deficiency Report
TYCOM	Type Commander
UIC	Unit Identification Code
VTC	Video Teleconferencing

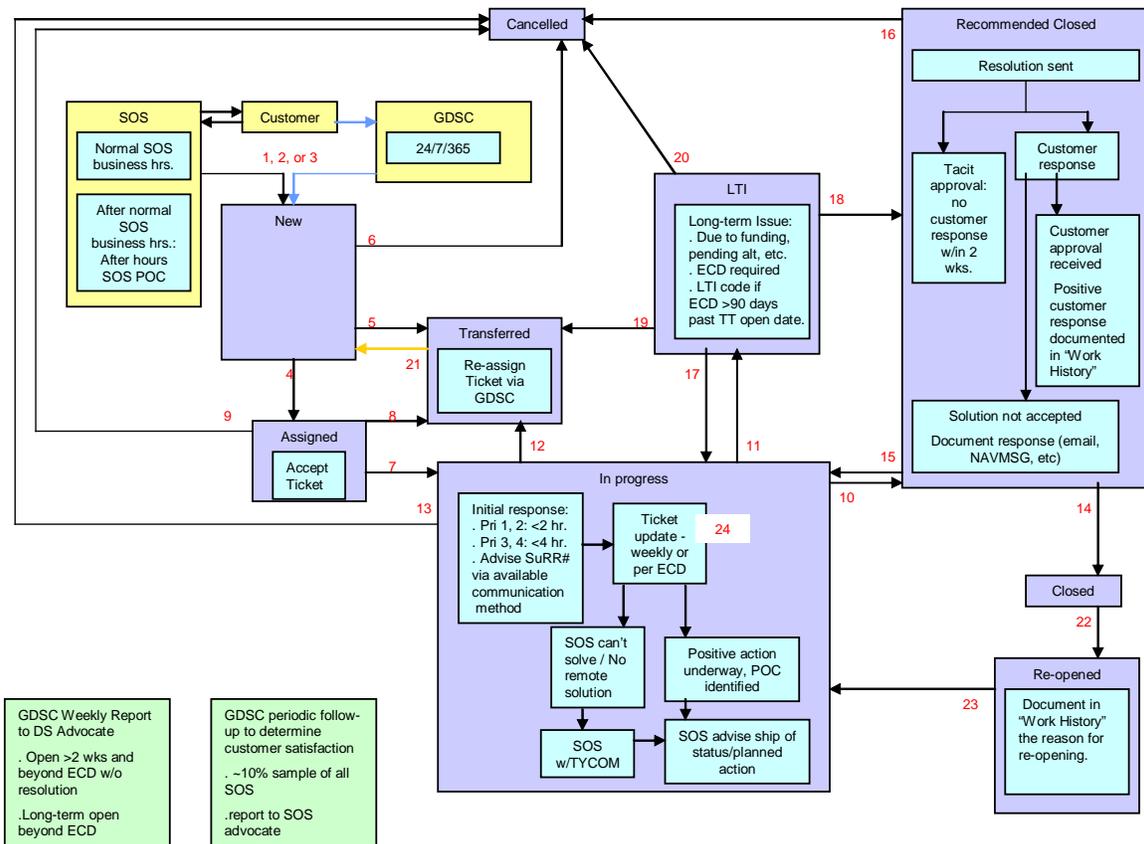
## Appendix C: SDE Forms Diagram



These are the five (5) Remedy SDE forms used in the Distance Support Shared Data Environment. Refer to paragraphs 2.2, and 3 for additional details.

The SOS provider should not alter or modify the Remedy SDE forms in any manner. If a change to these forms is required, a corresponding recommendation should be submitted to the CCB in accordance with paragraph 2.2.1

## Appendix D: Support Request Status Flow Chart



This flow chart illustrates DS Support Request progression within the Remedy® enabled SDE environment. Sections 2.2, 2.3, and 2.4 provide additional detail.

The status transactions are: New, Assigned, Transferred, In Progress, LTI, Cancelled, Recommend Close, Closed, and Re-opened.

Each Support Request will be processed through five (5) mandatory status transactions: New, Assigned, In Progress, Recommend Close, and Closed.

The numbers shown on the process flow arrows correspond with the numbered transactions in appendix F, displaying user data entry requirements.

## Appendix E: Common Data Elements

	Data Element	Length	Type	Definition / Comment	Entered by Customer	System / Workflow Generated	Entered by POC
1	APL	13	AN	APL - RIC			
2	EIC	7	AN	EIC code			
3	Nomenclature	250	Text	Nomenclature			
4	Noun Name	250	Text	Noun Name of System / Part			
5	Software Release Version	30	AN	Software Release Version			
6	JCN	14	AN	Job Control Number from 3M system	X		
7	Tracking Number	15	AN	4 Character Entry Point Identifier plus 11 numeric sequentially assigned		X Appendix I	
8	Date/Time Open	Remedy Default Format	Date/Time	When the Ticket is generated		X	
9	Priority	2	Selection	1 thru 4 per DTG 162034Z OCT 02 from COMNAVSURFOR SAN DIEGO CA	see para 2.4.1.8		
10	Customer First Name	30	Text	First Name	X		
	Customer Last Name	30	Text	Last Name	X		
	Customer Middle Initial	3	Text	Middle Initial or NMN	X		
11	Customer Designator	2	Selection	CIV, CIV-Govt, Cont, E1, E2, E3, E4, E5, E6, E7, E8, E9, W1, W2, W3, W4, O1, O2, O3, O4, O5, O6, O7, O8, O9, O10, FMS	X		
12	Customer Activity Name	100	Text	GDSC will provide table	see para. 2.4.1.4	see para. 2.4.1.4	
13	Customer UIC	8	AN	GDSC will provide table	see para. 2.4.1.4	see para. 2.4.1.4	
14	Customer Phone	20	Number	populate with valid phone number. If none-populate with N/A.	see para. 2.4.1.6	see para. 2.4.1.6	
15	Customer Email	50	Text	populate with valid email. If none-populate with N/A.	see para. 2.4.1.6	see para. 2.4.1.6	
16	IUID	50	Text	Item Unique Identification Code	see para. 2.4.1.7		
17	When Reported	Remedy Default Format	Date/Time	If not available, will default to Date/Time Open	see para. 2.4.1.5		
18	Problem Subject	128	Text	Like the Subject Line in an e-mail	X		
19	Problem Description	4000	Text	Unclassified - free form customers request for help	X		
20	Subject ID - Pre	2	Selection	See Subject Code Listing (Appendix G)	see para. 2.4.1.3		
21	Subject ID - Post	2	Selection	See Subject Code Listing (Appendix G)			see para. 2.4.1.3
22	CASREP	DTG	AN	When applicable	X		
23	Status	2	Selection	New, Assigned, In Progress, LTI, Rec Closed, Closed, Canceled, Transferred, Re-Opened			X
24	Status Date - New	Remedy Default Format	Date/Time	System Generated - hidden field		X	

## Appendix E: Common Data Elements (con't)

	Data Element	Length	Type	Definition / Comment	Entered by Customer	System / Workflow Generated	Entered by POC
25	Status Date - Assigned	Remedy Default Format	Date/Time	System Generated - hidden field		X	
26	Status Date - In Progress	Remedy Default Format	Date/Time	System Generated - hidden field		X	
27	Status Date - Recommend Close	Remedy Default Format	Date/Time	System Generated - hidden field		X	
28	Status Date - Close	Remedy Default Format	Date/Time	System Generated - hidden field		X	
29	Status Date - Cancelled	Remedy Default Format	Date/Time	System Generated - hidden field		X	
30	Status Date - Transferred	Remedy Default Format	Date/Time	System Generated - hidden field		X	
31	Status Date - LTI Assigned	Remedy Default Format	Date/Time	System Generated - hidden field		X	
32	Status Date - Re-Open	Remedy Default Format	Date/Time	System Generated - hidden field		X	
33	Problem Resolution Summary	2000	Text	SOS summary of what was done			X
34	SOS Activity	69	Text	Support Provider Activity		SOS Vectory	SOS Vectory
35	Long Term Issue Code	2	Selection	Awaiting Platform Availability, Awaiting Software upgrade, Awaiting Technical Personnel, Awaiting Technical Solution, Documentation, Funding, Operational Sequencing System (OSS), Other, Parts, System / Equipment no longer supported, Test Equipment, Training			X
36	ECD	mmddyyyy	Date	Estimated Completion Date - if open longer than 90 days			X
37	Work History	Memo	Text	Documentation of what was done during processing of the Support Request/Ticket			X
38	Type of Assist	2	Text	Onsite, DS(remote), Transition			X
39	Method of Request	2	Selection	Phone, Secure Phone, E-mail, SIPRNET E-mail, Web, Naval Message, FAX, NIPR Chat/VTC, SIPR Chat/VTC, Onsite Visit (Local), Onsite Visit (Travel), Tech Solutions, Written Request, Walk-in, Prediction, Other. Denotes initial method of request.			X
40	Touch Time	6	Numeric ( Minutes)	Actual time spent by personnel to resolve issue			X
41	Question 1 Response (Courtesy/Professional)	1	Selection	Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree,	X		
42	Question 2 Response (Kept Informed)	1	Selection	Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree,	X		
43	Question 3 Response (Resolved Timely)	1	Selection	Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree,	X		
44	Question 4 Response (Knowledgeable/Understood)	1	Selection	Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree,	X		
45	Question 5 Response (Provided Tracking Number)	1	Selection	Yes, No	X		
46	Comments	2000	Text		X		
47	Survey Create Date/Time		Date/Time	Actual Date/Time the Survey was populated		X	

## Appendix F: Status Transactions and Mandatory Data Elements

(The numbers listed with each transaction correspond with the Support Request Status Flow Chart provided as Appendix D.)

	Data Element	1 - customer to new (tech H/W )	2 - customer to new (tech not H/W)	3 - customer to new (not tech)	4 - new to assigned
1	APL #				
2	EIC				
3	Nomenclature				
4	Noun Name				
5	Software Release Version				
6	JCN	X	X		
7	Tracking Number				
8	Date/Time Open				x
9	Priority	X	X	X	
10	Customer POC	X	X	X	
11	Customer Designator	X	X	X	
12	Customer Activity Name	Pick one, system will	Pick one, system will	Pick one, system will	
13	Customer UIC	auto-populate others.	auto-populate others.	auto-populate others.	
14	Customer Phone	Need to enter one	Need to enter one	Need to enter one	
15	Customer Email	See para. 2.4.1.6	See para. 2.4.1.6	See para. 2.4.1.6	
16	IUID				
17	When Reported				
18	Problem Subject	X	X	X	
19	Problem Description	X	X	X	
20	Subject ID - Pre	X	X	X	
21	Subject ID - Post				
22	CASREP	X	X	X	
23	Status	New	New	New	Assigned
24	Status Date - New				
25	Status Date - Assigned				
26	Status Date - In Progress				
27	Status Date - Recommend Close				
28	Status Date - Close				
29	Status Date - Cancelled				
30	Status Date - Transferred				
31	Status Date - LTI Assigned				
32	Status Date - Re-Open				
33	Problem Resolution Summary				
34	SOS Activity	Select	Select	Select	
35	Long Term Issue Code				
36	ECD				
37	Work History				
38	Type of Assist				
39	Method Of Request	X	X	X	
40	Touch Time				
41	Question 1 Response (Courtesy/Professional)				
42	Question 2 Response (Kept Informed)				
43	Question 3 Response (Resolved Timely)				
44	Question 4 Response (Knowledgeable/Understood)				
45	Question 5 Response (Provided Tracking Number)				
46	Comments				
47	Survey Create Date/Time				

## Appendix F: Status Transactions and Mandatory Data Elements (con't)

(The numbers listed with each transaction correspond with the Support Request Status Flow Chart provided as Appendix D).

	<b>Data Element</b>	<b>5 - new to transfer</b>	<b>6 - new to cancelled</b>	<b>7 - Assigned to In progress</b>	<b>8 - Assigned to Transferred</b>	<b>9 - Assigned to Cancelled</b>	<b>10 - In progress to Recommend Close</b>	<b>11 - In progress to LTI</b>
1	APL							
2	EIC							
3	Nomenclature							
4	Noun Name							
5	Software Release Version							
6	JCN							
7	Tracking Number							
8	Date/Time Open	x	x	x	x	x	x	x
9	Priority							
10	Customer POC							
11	Customer Designator							
12	Customer Activity Name							
13	Customer UIC							
14	Customer Phone							
15	Customer Email							
16	IUID							
17	When Reported							
18	Problem Subject							
19	Problem Description							
20	Subject ID - Pre							
21	Subject ID - Post						Enter info	
22	CASREP							
23	Status	Transferred	Cancelled	In Progress	Transferred	Cancelled	Rec Close	LTI
24	Status Date - New							
25	Status Date - Assigned							
26	Status Date - In Progress							
27	Status Date - Recommend Close							
28	Status Date - Close							
29	Status Date - Cancelled							
30	Status Date - Transferred							
31	Status Date - LTI Assigned							
32	Status Date - Re-Open							
33	Problem Resolution Summary						Enter info	
34	SOS Activity	GDSC			GDSC			
35	Long Term Issue Code							Enter info
36	ECD			May Enter				Enter info
37	Work History	Enter info	Enter info	Enter info	Enter info	Enter info	Enter info	Enter info
38	Type of Assist						Enter info	
39	Method Of Request							
40	Touch Time							
41	Question 1 Response (Courtesy/Professional)							
42	Question 2 Response (Kept Informed)							
43	Question 3 Response (Resolved Timely)							
44	Question 4 Response (Knowledgeable/Understood)							
45	Question 5 Response (Provided Tracking Number)							
46	Comments							
47	Survey Create Date/Time							

## Appendix F: Status Transactions and Mandatory Data Elements (con't)

(The numbers listed with each transaction correspond with the Support Request Status Flow Chart provided as Appendix D).

	<b>Data Element</b>	<b>12 - In progress to Transferred</b>	<b>13 - In progress to Cancelled</b>	<b>14 - Recommend Close to Closed</b>	<b>15 - Recommend Close to In Progress</b>	<b>16 - Recommend Close to Cancelled</b>
1	APL					
2	EIC					
3	Nomenclature					
4	Noun Name					
5	Software Release Version					
6	JCN					
7	Tracking Number					
8	Date/Time Open	x	x	x	x	x
9	Priority					
10	Customer POC					
11	Customer Designator					
12	Customer Activity Name					
13	Customer UIC					
14	Customer Phone					
15	Customer Email					
16	IUID					
17	When Reported					
18	Problem Subject					
19	Problem Description					
20	Subject ID - Pre					
21	Subject ID - Post			Enter info		
22	CASREP					
23	Status	Transferred	Cancelled	Closed	In Progress	Cancelled
24	Status Date - New					
25	Status Date - Assigned					
26	Status Date - In Progress					
27	Status Date - Recommend Close					
28	Status Date - Close					
29	Status Date - Cancelled					
30	Status Date - Transferred					
31	Status Date - LTI Assigned					
32	Status Date - Re-Open					
33	Problem Resolution Summary			Enter Info		
34	SOS Activity					
35	Long Term Issue Code					
36	ECD					
37	Work History	Enter Info	Enter Info	Enter Info	Enter Info	Enter Info
38	Type of Assist			Enter Info		
39	Method Of Request					
40	Touch Time					
41	Question 1 Response (Courtesy/Professional)					
42	Question 2 Response (Kept Informed)					
43	Question 3 Response (Resolved Timely)					
44	Question 4 Response (Knowledgeable/Understood)					
45	Question 5 Response (Provided Tracking Number)					
46	Comments					
47	Survey Create Date/Time					

## **Appendix F: Status Transactions and Mandatory Data Elements (con't)**

(The numbers listed with each transaction correspond with the Support Request Flow Chart provided as Appendix D).

	<b>Data Element</b>	<b>17 - LTI to In progress</b>	<b>18 - LTI to Recommend Close</b>	<b>19 - LTI to Transferred</b>	<b>20 - LTI to cancelled</b>	<b>21 - Transferred to New</b>
1	APL					
2	EIC					
3	Nomenclature					
4	Noun Name					
5	Software Release Version					
6	JCN					
7	Tracking Number					
8	Date/Time Open	x	x	x	x	x
9	Priority					
10	Customer POC					
11	Customer Designator					
12	Customer Activity Name					
13	Customer UIC					
14	Customer Phone					
15	Customer Email					
16	IUID					
17	When Reported					
18	Problem Subject					
19	Problem Description					
20	Subject ID - Pre					
21	Subject ID - Post					
22	CASREP					
23	Status	In Progress	Rec Close	Transferred	Cancelled	New
24	Status Date - New					
25	Status Date - Assigned					
26	Status Date - In Progress					
27	Status Date - Recommend Close					
28	Status Date - Close					
29	Status Date - Cancelled					
30	Status Date - Transferred					
31	Status Date - LTI Assigned					
32	Status Date - Re-Open					
33	Problem Resolution Summary					
34	SOS Activity					Enter Info
35	Long Term Issue Code					
36	ECD					
37	Work History	Enter Info	Enter Info	Enter Info	Enter Info	Enter Info
38	Type of Assist					
39	Method Of Request					
40	Touch Time					
41	Question 1 Response (Courtesy/Professional)					
42	Question 2 Response (Kept Informed)					
43	Question 3 Response (Resolved Timely)					
44	Question 4 Response (Knowledgeable/Understood)					
45	Question 5 Response (Provided Tracking Number)					
45	Question 5 Response (Provided Tracking Number)					
46	Comments					
47	Survey Create Date/Time					

## Appendix F: Status Transactions and Mandatory Data Elements (con't)

(The numbers listed with each transaction correspond with the Support Request Status Flow Chart provided as Appendix D).

	<b>Data Element</b>	<b>22 - Closed to Re-opened</b>	<b>23 - Re-opened to In progress</b>	<b>24 - In progress update</b>
1	APL			
2	EIC			
3	Nomenclature			
4	Noun Name			
5	Software Release Version			
6	JCN			
7	Tracking Number			
8	Date/Time Open	x	x	x
9	Priority			
10	Customer POC			
11	Customer Designator			
12	Customer Activity Name			
13	Customer UIC			
14	Customer Phone			
15	Customer Email			
16	IUID			
17	When Reported			
18	Problem Subject			
19	Problem Description			
20	Subject ID - Pre			
21	Subject ID - Post			
22	CASREP			
23	Status	Re-opened	In progress	In progress
24	Status Date - New			
25	Status Date - Assigned			
26	Status Date - In Progress			
27	Status Date - Recommend Close			
28	Status Date - Close			
29	Status Date - Cancelled			
30	Status Date - Transferred			
31	Status Date - LTI Assigned			
32	Status Date - Re-Open			
33	Problem Resolution Summary			
34	SOS Activity			
35	Long Term Issue Code			
36	ECD			
37	Work History	Enter info	Enter info	Enter info
38	Type of Assist			
39	Method Of Request			
40	Touch Time			
41	Question 1 Response (Courtesy/Professional)			
42	Question 2 Response (Kept Informed)			
43	Question 3 Response (Resolved Timely)			
44	Question 4 Response (Knowledgeable/Understood)			
45	Question 5 Response (Provided Tracking Number)			
46	Comments			
47	Survey Create Date/Time			

## Appendix G: List of Subject ID Numbers

Subject ID	ID #
H/W Other	1
S/W Other	2
Logistics Other	3
Training Other	4
Documentation Other	5
PMS Other	6
Manning Other	7
QOL Other	8
Medical Other	9
H/W Tech Assist	10
H/W Supply Support	11
H/W Manpower/Personnel	12
H/W Training	13
H/W Tech Data – Manuals/ Drawings	14
H/W Tech Data – Instructions	15
H/W Configuration	16
H/W Safety	17
H/W Programmatic	18
S/W Tech Assist	19
S/W Supply Support	20
S/W Manpower/Personnel	21
S/W Training	22
S/W Tech Data – Manuals/ Drawings	23
S/W Tech Data – Instructions	24
S/W Configuration	25
S/W Safety	26
S/W Programmatic	27
Medical Tech Assist	28
Medical Supply Support	29
Medical Manpower/Personnel	30
Medical Training	31
Medical Tech Data – Manuals/ Drawings	32
Medical Tech Data – Instructions	33
Medical Configuration	34
Medical Safety	35
Medical Programmatic	36
QOL Chaplain	37
QOL BUPERS	38
QOL Pay	39
QOL Support Infrastructure	40
Feedbacks FCFBR	41
Feedbacks Training	42
Feedbacks TMDR	43
Feedbacks Other	44
Feedbacks TFBR	45
Feedbacks ACR	46
Feedbacks QDR	47
Feedbacks PMS	48
Feedbacks OSS	49
Dir. Asst.	50
NEMAIS	51

**Appendix H: SDE Requirements Test Form**

<i>Distance Support Remedy® Support Request Record Requirements Verification</i>				
<i>Activity:</i> _____				
	<i>All mandatory data fields are available on activity application. Data fields are defined in the SOS Business Rules, Appendix E.</i>	<i>Installer Verification (initials and date)</i>	<i>Activity Verification (initials and date)</i>	<i>Remarks (initial and date)</i>
1	APL			
2	EIC			
3	Nomenclature			
4	Noun Name			
5	Software Release Version			
6	JCN			
7	Tracking Number			
8	Date/Time Open			
9	Priority			
10	Customer POC			
11	Customer Designator			
12	Customer Activity Name			
13	Customer UIC			
14	Customer Phone			
15	Customer Email			
16	IUID			
17	When Reported			
18	Problem Subject			
19	Problem Description			
20	Subject ID - Pre			
21	Subject ID - Post			
22	CASREP			
23	Status			
24	Status Date - New			
25	Status Date - Assigned			
26	Status Date - In Progress			
27	Status Date - Recommend Close			
28	Status Date - Close			
29	Status Date - Cancelled			
30	Status Date - Transferred			
31	Status Date - LTI Assigned			
32	Status Date - Re-Open			
33	Problem Resolution Summary			
34	SOS Activity			
35	Long Term Issue Code			

**Appendix H: SDE Requirements Test Form**

	All mandatory data fields are available on activity application. Data fields are defined in the SOS Business Rules, Appendix E.	Installer Verification (initials and date)	Activity Verification (initials and date)	Remarks (initial and date)
36	ECD			
37	Work History			
38	Type of Assist			
39	Method of Request			
40	Touch Time			
41	Question 1 Response (Courtesy/Professional)			
42	Question 2 Response (Kept Informed)			
43	Question 3 Response (Resolved Timely)			
44	Question 4 Response (Knowledgeable/Understood)			
45	Question 5 Response (Provided Tracking Number)			
46	Comments			
47	Survey Create Date/Time			

**Appendix H: SDE Requirements Test Form**

	<b>Is full functionality from the activity to the GDSC displayed for each of the following transactions? Functionality and data element requirements for each transaction are defined in the SOS Business Rules, section 2.4 and appendices C, D and F.</b>			
1	Customer to New (tech H/W)			
2	Customer to New (tech not H/W)			
3	Customer to New (non-tech)			
4	New to Assigned			
5	New to Transfer			
6	New to Cancelled			
7	Assigned to In Progress			
8	Assigned to Transferred			
9	Assigned to Cancelled			
10	In Progress to Recommend Close			
11	In Progress to LTI			
12	In Progress to Transferred			
13	In Progress to Cancelled			
14	Recommend Close to Closed			
15	Recommend Close to In Progress			
16	Recommend Close to Cancelled			
17	LTI to In Progress			
18	LTI to Recommend Close			
19	LTI to Transferred			
20	LTI to Cancelled			
21	Transferred to New			
22	Closed to Re-opened			
23	Re-opened to In Progress			
24	In Progress update			

The Distance Support Remedy<sup>®</sup> Installation Requirements Functional Test has been successfully completed and witnessed by the undersigned.

For the Installation Team:

For the Activity:

\_\_\_\_\_  
signature and date

\_\_\_\_\_  
signature and date

\_\_\_\_\_  
printed name

\_\_\_\_\_  
printed name

Comments

## APPENDIX I: GDSC HUB Prefix

<b>Ticket Prefix</b>	<b>Ticket Generated By:</b>	<b>Remarks</b>
CNIC	Commander Navy Installations Command	
CNIN	Naval Surface Warfare Center, Crane, IN	
CRPH	Naval Surface Warfare Center, Philadelphia, PA	
DLDN	Naval Surface Warfare Center, Dahlgren, VA & Dam Neck, VA	
GDSC	Global Distance Support Center (Technical), Norfolk, VA	
GDSL	COMFISC San Diego/COMFISC Norfolk	
IHMD	Naval Surface Warfare Center Indian Head and PHS&T Center, Earle NJ	
KPWA	Naval Undersea Warfare Center, Keyport, WA	
NCTL	NCTAMSLANT	No longer active
NCTP	NCTAMSPAC	No longer active
NICC	Navy Integrated Call Center	replaced by "GDSC"
NPRI	Naval Undersea Warfare Center, Newport, RI	
PHCA	Naval Surface Warfare Center, Port Hueneme, CA	
RCRP	Naval Expeditionary Combat Command Readiness Cost Reporting Program	
RMAS	Regional Maintenance Automated Information System (RMAIS)	No longer active
SHIP	Operational Fleet Units	
SPAA	SPAWAR HQ (Corporate), San Diego, CA	
SPAC	SPAWAR Systems Center Atlantic, Charleston, SC	
SPAN	SPAWAR Systems Center Atlantic, Norfolk, VA	
SPAO	SPAWAR Systems Center Atlantic, New Orleans, LA	
SPAS	SPAWAR Systems Center Pacific, San Diego, CA	