Distance Support (DS)

Customer Relationship Management (CRM)

NAVY 311

Source of Support (SOS) Business Rules

Version 5.0

Sea Warrior
P R O G R A M
PMW 240

March 2015

Business Rules Change Record

Date	Version	Change Summary
Feb 07	0.0	Baseline Draft
Feb 08	1.0	Update reflecting changes made during Business Rules Meeting 23/24 January 2008
Jun 08	1.0	Signed as baseline
Aug 09	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 09	1.2	Incorporates Administrative changes SD2, SD4, SD6, T2 and ECPs eCRM 0003, SD8 16, & SD8 22-31
Jan 11	2.0	Incorporates Administrative changes CR 232, 242, and CR 117, and Class I CR 122, CR 228 and CR 110
May 12	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
Apr 14	4.0	Incorporates Administrative changes CR 255 & CR 300; and, Class I changes CR 107, CR 108, CR 111, CR 225, CR 233, CR 239, CR 251, CR 252, CR 253, CR 254, CR 259 and CR 260. The Title page & content have been changes to reflect the renaming of Distance Support to NAVY 311.
Mar 15	5.0	Incorporates new Support Provider Directory business rules section and a new Technical Addendum. Also incorporates Administrative changes CR 101A, CR 262, CR 301, CR 302, CR 303, CR 305, and Class I changes CR 104A, CR 105, CR 113, CR 130 & 130A, CR 218, CR 234, CR 236 & 249, CR 245, and CR 258

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Technical Addendum

1 OVERVIEW

The PMW 240 DS CRM Program, and specifically the NAVY 311 initiative 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 sustainment and operations. 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 Sates (CONUS/OCONUS)). NAVY 311 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 enterprise DS CRM system to which they apply. The "DS CRM system", or "eCRM" as cited throughout, is a Remedy® Action Request System (ARS), 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. The Technical Addendum to this document provides technical details pertaining to the DS CRM.

Proposed changes to this document should be forwarded via email to the NAVY 311 Standardization & Governance 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 email. 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 business rules document is posted online at the Navy 311 Website. Past editions can be distributed via email upon request.

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

2 SUPPORT REQUEST PROCESSING

2.1 Overview

The NAVY 311 initiative includes a global distance support community (GDSC) of geographically dispersed, independently managed but centrally coordinated Tier 1/Tier 2 contact centers enabled by advanced DS CRM capabilities and a network of Source of Support (SOS) activities. By incorporating today's best practices for call centers and help desks, the NAVY 311 Community will consist of fewer, more sophisticated SOS contact centers. Call centers, or alternatively, a number of related but consolidated contact centers, will focus dedicated service for the following Functional Areas: Personnel, Equipment, Supply, Training, Ordnance, Medical, Installations & Facilities, and Information Technology (IT).

By leveraging DS CRM capabilities, NAVY 311 will provide effective 24/7/365 support to its customers, including a streamlined process through which Support Requests can be efficiently managed. This global distance support community 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 a Support Provider Directory. From the point of inception, to its completion/closure, the Support Request will be processed and managed within the DS CRM system.

NAVY 311 will not have Technical Authority for any system or program. Instead and as mutually determined, guidance will be provided by the respective Technical Authorities to supply answers to customer inquiries when appropriate. Specifically, Tier 1 and Tier 2 personnel manning the contact centers will have access to a knowledge base containing scripted answers to specific questions.

The DS CRM is the NAVY 311 vehicle for:

- Documenting the customer requirement
- Forwarding the requirement to the appropriate SOS
- Taking requisite action and 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 NAVY 311 infrastructure for the processing of Support Requests.

Navy-wide implementation of the DS CRM system (DITPR-DON ID 20956) and NAVY 311 is ongoing. It is a goal of the PMW 240 DS Program to have all Support Request data recorded in this one, authoritative "Enterprise CRM System" to generate universal, near real-time, Navy-wide metrics. The single, integrated NAVY 311 database employs Remedy® ARS, and configuration board approved commercial off-the-shelf (COTS) software. Procedures contained in this document discuss Support Request processing among federated NAVY 311 SOS activities operating with an existing Remedy® application. The procedures also apply (until total NAVY 311 integration is achieved) to non-federated members, either with or without existing Remedy® applications. Non-federated SOS providers who participate in NAVY 311 shared data

initiatives operate contact centers that function with other than the NAVY 311 software, and/or operate without a direct interface in place to connect with the eCRM system.

An eCRM Configuration Control Board (CCB) is chartered to ensure that proposed changes to the NAVY 311 Business Rules are viable and will not inadvertently impact preexisting system or subsystem operations. The CCB serves to promote awareness of, and compliance with, the Business Rules. Voting members of the CCB include the Chairperson and one representative from each of the following Commands/SYSCOMs as listed in the eCRM CCB Charter: USFF, NAVSEA, NAVAIR, NAVSUP, SPAWAR, NAVFAC, BUMED, CYBERFOR/NAVIDFOR, PMW240, and BUPERS/OPNAV N1. Voting members rely on a team of participating GDSC members within each Functional Area who are 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 CRM Program, NAVY 311 initiative 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 SOS activities within the NAVY 311 network employ the Remedy® ARS 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. DSO workflow and technical implementation within the eCRM is discussed in the Technical Addendum. A flowchart of SDE Support Request status transactions is provided as Figure 1 at section 2.4 of this document. These transactions are discussed in detail within section 2.4. A listing of Distance Support SDE Common Data Elements is provided within the Technical Addendum.

Once a Support Request has been documented / created, the associated data will be accessible by all NAVY 311 organizations. Non-DS CRM SOS activities will periodically forward a file of common data elements to NAVY 311 so that their specific Support Request data can be included in the Navy-wide DS CRM 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   Data Management

The quality and completeness of shared data among the Community of partnered activities is essential to facilitate knowledge management initiatives and the provision of accurate metrics, reports and business intelligence.

For data reconciliation/synchronization purposes, partnered activities will not archive any Support Request until a minimum three year period has passed from the date it was either "Closed" or "Cancelled". After the three years have passed, it will be at the discretion of the activity to determine when and by what means to archive any local records.

The SDE will centrally maintain a minimum of 10 years of data (both ticket and complementary). It is also the case that the SDE will not archive any (Level 1 / Level 2) data, instead making it available for the Community to access whenever required. Partnered activities may request the SDE to also store Level 3 / Level 4 data per separate, documented arrangements.

2.2.2 SDE Configuration Management

Partnering services are available to document, evaluate and ultimately host new SOS application functionality (i.e., data element content and unique forms) that is not already contained within the DS CRM system. Join requests will be submitted to NAVY 311 for technical evaluation.

The CCB regulates the use and maintenance of the eCRM system and associated configuration items. The CCB will meet within two months of convening annual NAVY 311 onsite Workshops (both east and west coast). Special CCB sessions may be convened as required. The CCB Chairperson will serve as the CCB facilitator and business coordinator.

Proposed business rule changes should be emailed to the NAVY 311 Standardization & Governance Manager. Proposals should be documented using the CCB Change Request form appended to the eCRM CCB Charter to describe the nature of the change, and discuss the potential benefit of its implementation.

The NAVY 311 Standardization & Governance Manager will, at minimum, conduct a semi-annual review of all data elements. 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 NAVY 311 Project Director.

2.3 Support Request Submission

Whenever other support provisions are unavailable or cannot be identified, a "reach-out" to NAVY 311 will assist servicemembers or the extended Navy family (e.g., dependents, reservists, veterans, contractors, Navy infrastructure professionals, etc.) with any issue.

Support Requests may be submitted in a variety of ways, including email, telephone (secure and non-secure), fax, texting, the NAVY 311 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.

Telephonic submissions can be assisted via the use of a "push-button" options menu, directing the customer to the NAVY 311 Community partner activity best suited to handle their request. (Appendix B provides a schematic of the "Phone tree" taxonomy).

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, section 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 below. The arrows indicate the permitted, progressive (and regressive) status transactions that may occur with the processing of any Support Request. 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.

Figure 1 - <u>Support Request Workflow Diagram</u>
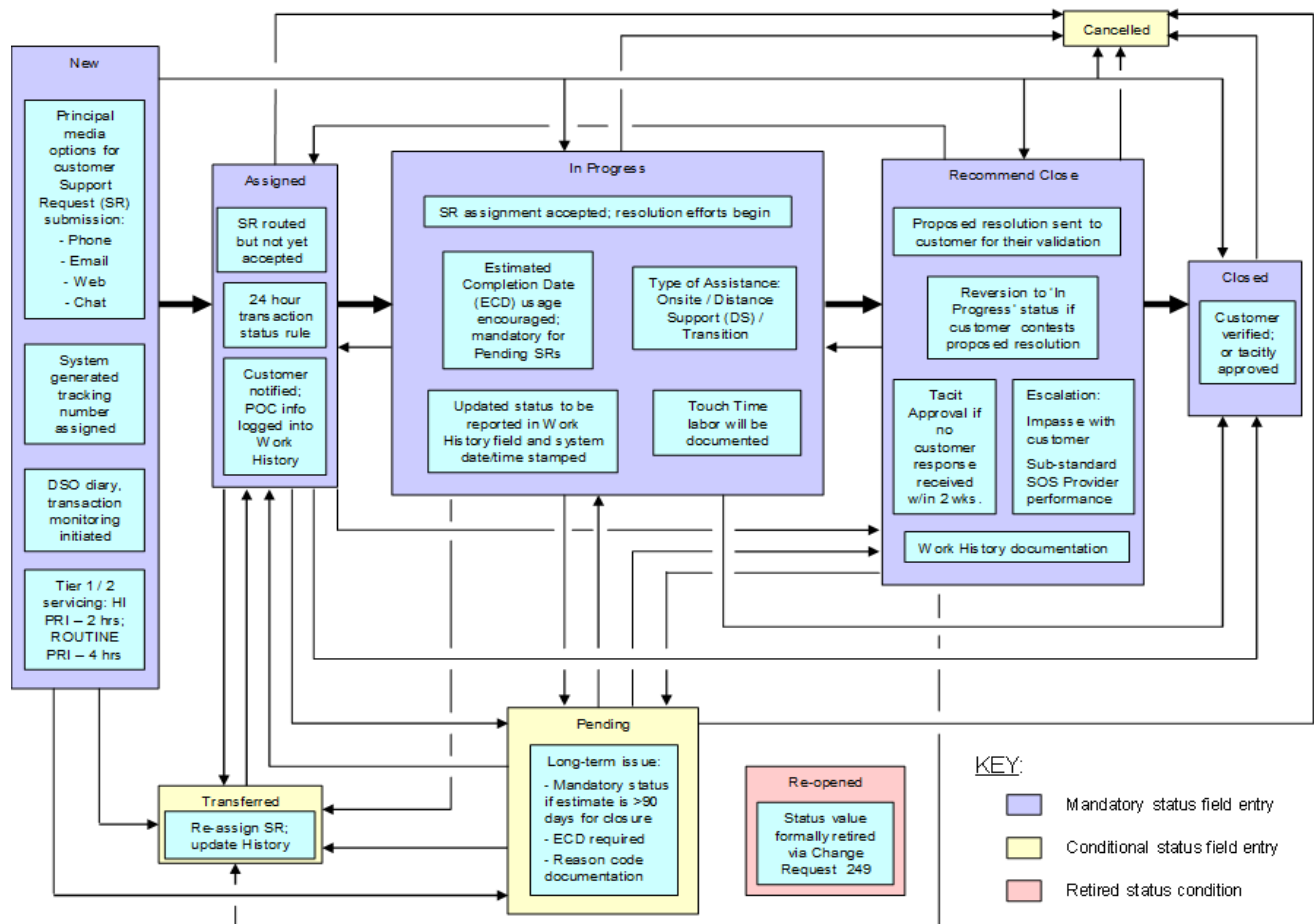
An SOS Provider may be able to resolve a request shortly after initial customer contact.   In this instance, the corresponding Support Request may go directly from "New" to "Closed". Data

entries will be backfilled on the Support Request for the other mandatory status transactions (i.e., "Assigned", "In Progress", "Recommend Close").

In general, the skipping over of any mandatory status conditions during the <u>progression</u> of Support Request processing requires the backfilling of their "Status Date" fields with appropriate time/date stampings.

When a Support Request experiences <u>regression</u> in going (backward) from one status condition to another the affected "Status Date" elements will be rest to "NULL" or blank, and the newly arrived at condition will be reset with a current time/date stamp.

2.4.1 New (Support Request Creation)

A ticket in "New" status is a system generated status which is transitional until the ticket is saved and has progressed to another status. The status of "New" occurs only once in a ticket's life. "Status Date – New" is populated with the current date/time when a Support Request is submitted and will not be changed.

2.4.1.1 Regardless of where the Support Request has its genesis within the NAVY 311 Community, the Customer Support Professional (CSP) at the servicing contact center will create a Remedy® 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 activity (DSO Prefix), 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 NAVY 311 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 311 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 Support Provider Directory.

- 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 (refer to the Technical Addendum). 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 indexed to Subject ID categories as discussed in the Technical Addendum.

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 Support Requests are indexed to Commodity Names as discussed in the Technical Addendum. The look-up tables for the "Commodity Name" field values are provided in the Support Provider Directory.

If an appropriate Commodity Name cannot be found from the options available, a temporary "dummy" value of COMMODITY NAME PENDING will be entered to enable the continued processing of the ticket. A bona fide "Commodity Name" value will replace the dummy value before the ticket is placed into a status condition of "Closed".

The processing of online Change Requests (e.g., to add Commodities to the Support Provider Directory) is discussed at Subsection 4.5.

A dummy value may also be used when transferring a ticket (refer to Subparagraph 2.4.1.12).

2.4.1.5 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 NAVY 311 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 Support Provider Directory can also be consulted to help find activity UICs.

2.4.1.6   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 first 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.

2.4.1.7   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 Email".   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 email field if the customer does not have a valid email address.

In addition, whenever a complete proper name is not available (e.g., MM3 Smith or LT Jones), or a billet/role/position/code is provided in lieu of a proper name (e.g., Duty Officer, Executive Officer, Building/Facilities Manager) care will be taken to enter as much of the appropriate data (e.g., military rate or rank) into its proper customer demographic field, with the balance of the data entered into the "Customer Last Name" field. An N/A may be entered into the "Customer First Name" when these situations are encountered.

If an appropriate entry cannot be found from the menu options available for the "Customer Rate/Rank/Salutation" or "Customer Service Type" fields a "dummy" value of DEMOGRAPHIC PENDING will be entered to enable the continued processing of the ticket.

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, where indicated, on the Support Request.

The "Method of Request" data field will be populated to indicate the initial means (or medium) used by the customer to initiate their request. The field will not be reset to any other value throughout the remaining processing of the ticket.

2.4.1.8   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.

2.4.1.9   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: <u>Extremely important</u>   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: <u>Important</u> 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: <u>Quality of service</u> requests.

2.4.1.10   When processing a "New" Support Request, a Support Provider Directory is available to determine the authoritative Support Provider to provide the requisite assistance. The global distance support community will create and immediately transmit a Support Request to the indicated SOS activity for action.

2.4.1.11   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 system 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".

2.4.1.12   Whenever it is determined that a "New" Support Request requires the assistance of a different 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 Support Provider Directory.   The transfer need not be routed to the NAVY 311 hub, unless the gaining SOS cannot be determined for any reason.   The provisions of paragraph 2.4.4 ("Transferred" Support Requests) will be followed.

Whenever appropriate or necessary, COMMODITY PENDING may be entered into the "Commodity Name" field to enable the transfer the Support Request. This includes those instances when the Commodity Name is unknown, or suspected as being in error. The gaining activity will ensure that a bona fide Commodity Name is entered onto the ticket before it is placed into a status condition of "Closed".

2.4.2   Assigned (Support Request Acceptance)
A ticket in 'Assigned' status means the incident has been assigned to an SOS activity, support group or an individual, but has not yet been acknowledged.

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 one business day 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 one business day time limit:

Completed Tier 1/ Tier 2 Processing of "New" Support Requests:
- Priority 1 or 2 Request - two (2) business hours.
- Priority 3 or 4 Request - four (4) business hours.

Note: (1) The one business day 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   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", "Pending", "Transferred" or "Cancelled".

2.4.3   In Progress (Support Request Action/Status Processing)
A ticket in "In Progress" status means the Assigned ticket has been accepted and the Assignee is working towards resolution.

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 "Pending" 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.

- <u>Onsite</u> - Anytime assistance is render 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.
- <u>DS</u> (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.
- <u>Transition</u> - 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 referenced in the Technical Amendment.

2.4.3.5 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", "Pending", "Transferred" or "Cancelled".

2.4.4 Transferred (Support Request Re-Assignment)

A ticket in "Transferred" status means the ticket has been transferred to another SOS activity. The receiving SOS activity will change the status to "Assigned" automatically.

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 Support Provider Directory if needed as a reference. The transfer need not be routed through the NAVY 311 hub, 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 When a Support Request is in "Transferred" status, a transaction by the "gaining" SOS, or, when necessary, the NAVY 311 hub, must then be entered into the SDE for "Assigned" status.

2.4.4.4 Whenever appropriate or necessary, COMMODITY PENDING may be entered into the "Commodity Name" field to enable the transfer the Support Request. This includes those

instances when the Commodity Name is unknown, or suspected as being in error. The gaining activity will ensure that a bona fide Commodity Name is entered onto the ticket before it is placed into a status condition of "Closed".

2.4.5   Pending

A ticket in "Pending" status means the work on the incident has been temporarily suspended due to waiting for some other action outside of the SOS activity's control. A Pending Reason is required when the status is "Pending".

2.4.5.1   "Pending" will always be selected whenever 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. "Pending" may also be selected, when qualified, for Support Requests that are anticipated to complete within a 90-day period of time.

When a Support Request is placed in "Pending" status, both the Pending Reason and the ECD fields will also be filled. The Reason indicates why the Support Request is being placed in "Pending" status; the ECD provides an expected date that the Support Request will be resolved or completed. Once the Reason has been entered it will not be removed from the Support Request as the ticket moves from "Pending" 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 of less than 90 days may utilize the ECD field without setting the status to "Pending".

2.4.5.2   Pending Reason selection options are:

- 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

2.4.6   Recommend Close (SOS Resolution Sent)

A ticket in "Recommend Close" status means that a resolution or workaround to restore the service has been provided and is waiting for customer validation that their request has been resolved.

2.4.6.1   The SOS will forward proposed completion actions to the customer via the most appropriate means (e.g., telephone, email, "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   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 contact centers will try to resolve Customer Support issues in coordination with the Point of Contact (POC) specified in the Support Provider Directory. 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)

A ticket in "Closed" status means either the customer has validated the resolution, or the ticket has been in "Recommend Close" for 14 days and will be auto-closed. Closed Support Requests cannot be re-opened (i.e., transitioned to another status).

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   Support Requests will not be placed in "Re-opened" status after having been "Closed".

2.4.8   Reopening of a Support Request

Support Requests will not be re-opened after status is set to "Closed". Once ticket status is set to "Closed" any contact from the customer indicating that their Request has not been resolved will result in the opening of a new Support Request. The closed ticket and the newly created ticket will be link and the reason for the creation of a new Support Request will be documented in the "work History" field.

2.4.9   Cancelled Support Requests

Used in lieu of deleting a ticket, e.g., test tickets, training, duplicates, and administrative needs. Cancelled tickets will not be included in numbers of Support Requests (ticket counts).

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.

2.4.10   Deletion of Support Request Records

Under no conditions will Support Requests be deleted.   In rare instances, the NAVY 311 Project Director may approve and monitor the cancellation of Requests, e.g., Support Requests input for testing purposes, or when DS CRM aberrations inadvertently create/replicate Request records.

2.5 Reports

The NAVY 311 hub 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 NAVY 311 to gauge customer satisfaction with DS responsiveness by sending out automated email follow-ups to each Support Request. Results of this customer satisfaction survey will only be distributed to the NAVY 311 Project Director, 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 NAVY 311 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 and the total number of survey requests sent/dispatched by month.

The decision for how often to survey repeat customers will be left to the discretion of the local activity. The benefit or potential of receiving feedback should be weighed against the consideration that too many solicitations may annoy the recipient.

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 Support Provider Directory as the primary reference.

3.4   Single Point of Entry

The NAVY 311 hub [aka, GDSC (Technical) (GDSC (T), or Global Distance Support Center, "GDSC"] 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 ensures 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 GSDC 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 NAVY 311 informed via email or telephone and the status will be documented for them in 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 Email address
- Customer UIC
- Problem Subject
- Problem Description
- Work History
- Problem Resolution Summary (if resolved).
- Subject ID Pre Coding
- 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 "Fault/Failure – Hardware" or "Fault/Failure – Software".

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 (Pending status) 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 SUPPORT PROVIDER DIRECTORY (SPD) PROVISIONS

4.1 Overview

DS top level requirements (TLRs) call for the availability and maintenance of an accurate, comprehensive, SOS provider listing, available to the Tier 1 Help Desks on a 24/7/365 basis, to ensure that an authorized activity (and/or subject matter expert) can be identified to respond to any category of required assistance.

A secondary requirement is to provide a comprehensive "Yellow Pages" listing of all approved Tier 1 sources of support to the Warfighter via World Wide Web.

To this end, the PMW 240 DS CRM Program created the SPD to be populated and maintained by Enterprise-wide owners of managed products, services & policies.

SPD design provisions include:

- Relational Tables to store provider activity and individual POC support information (i.e., call centers and help desks, as well as technical agents, authorized service personnel & subject matter experts)
- Provisioned Maintenance Capabilities to enable the means to proactively maintain SPD record accuracy and comprehensiveness
- Integrated Remedy$^{®}$ Support Request Processing to facilitate the automated routing of individual Support Request tickets within the NAVY 311 network of affiliated call centers
- Reporting and Alert Features to facilitate the maintenance, monitoring and effectiveness of SPD operations
- SOS Manager Access Control for individual records to maintain appropriate channels of communication and escalation processes.

This section establishes the business rules for the compliance of all SOS activities and providers throughout the NAVY 311 infrastructure, affecting the initialization, sustainment, and validation of the SPD.

The rules apply to SOS activities that are participating NAVY 311 partners with an existing Remedy$^{©}$ ARS application.

SPD functionality (separate from its composite data records) will be managed for configuration purposes per the change management provisions documented in the NAVY 311 Systems Engineering Plan (SEP) and the eCRM CCB Charter.

4.1.1   Web-based SPD Applications

An external-facing, PKI-enabled Support Provider Directory is available for the information requirements of non-NAVY 311 members and the Naval Enterprise. It is accessible via NAVY 311 Web services and is synchronized with the records maintained in the SPD version integrated into the NAVY 311 Support Request workflow process.

A public-facing, non-PKI Web version of the SPD is planned for incorporation at the NAVY 311 site as a reference tool tailored to display only non-business sensitive information.

4.2   Construct

The SPD is a shared resource, created principally for the workflow processing of the participating NAVY 311 activities & their associated SOS Providers.

Support Provider records that together comprise the total SPD are distributed and managed as independent record sets that span across the PESTOMIN spectrum of readiness categories (i.e., Personnel, Equipment, Supply, Training, Ordnance, Medical, Infrastructure/Facilities and Networks).

SPD records contain three distinct types of data:

(1)   Asset Data; consisting of the Commodity (i.e., product, service, information or policy) and its associated Unique Identifier (type & specific designator, when available) combined with a conditional Subject ID

(2)   Provider Data; consisting of the cognizant SOS Activity & detailed POC (e.g., technical agent, subject matter expert, service representative) information

(3)   Heritage Data; consisting of record date/time stamping to facilitate records management and metrics reporting.

SPD inputs are routinely solicited from the Naval Enterprise and their supporting organizations through various Public Affairs awareness campaigns and information broadcasts. Contributing activities, as well as their associated SOS providers, are responsible to maintain and manage the accuracy and comprehensiveness of their records.

4.3   Scope

SPD records are scalable either by limiting the level of detail provided, or through the capability to restrict the viewing of select data. In this fashion, the routing of Support Requests can be channeled for initial (Tier 1/2) Help Desk review or directly routed to a (Tier 3) designated individual (e.g., technical agents, subject matter expert, service representative) and, as desired, any alternative POCs or contingency back-up(s).

The scaling of SPD records to restrict certain viewing privileges is discussed below within section 4.4

NAVY 311 routing of Support Requests is accomplished considering: (1) the Subject ID assistance category; and, (2) the item Commodity and any Unique Identifier Type information. The program goal is for SPD comprehensiveness --- at a minimum, to provide Tier 1 / 2 routing assignments for all of the Subject IDs and Commodities within each PESTOMIN functional category.

Program offices/activities requesting to partner with NAVY 311 through participation in the many services and shared data opportunities will be required to enter SOS activities/providers records into the SPD and designate a Manager who will be provided the requisite SPD access and data maintenance privileges.

4.4   User Roles
SPD-unique roles include:

- Public Users (non-Common Access Card (CAC) holders)

- CAC Users (NAVY 311 registered, DoD Smart Card holders); including SOS providers with special access as delineated by their activity Managers

- Authority Agents (Navy Enterprise activities that manage products, services, policies, Support Providers & customer support provisions)

- Managers (individuals designated by their activities to create & maintain activity-unique SPD records)

- Administrators (SPD application maintainers assigned by the NAVY 311 Project Director)

CAC Users must register for SPD access via NAVY 311 Web services (www.Navy311.navy.mil). Registration is not required for Public Users to access and review records in the SPD.

Public Users will be able to view restricted data (non-business sensitive) records.

CAC Users are able to view records, conduct research, and flag records for maintenance action. NOTE: Records will not be viewable if blocked from viewing by a Manager who has set SOS Location restrictions.

Note: Location restrictions can be applied by Managers to identify Users who will have exclusive viewing rights to records under their purview --- excluding all other Users.

Authority Agents assign the responsibility to Managers from their activities to sustain accuracy and comprehensiveness managing the activity-specific SPD records.

Managers have CAC User privileges plus the ability to manage (i.e., add/delete/modify) SPD records when required. Mangers may also place SOS Location restrictions on the viewing of the records they manage --- e.g., to restrict access to individuals from any outside activities.

Administrators have all the CAC User, Manager & Authority Agent privileges. In addition they are able to designate individuals as Managers.

Activity Managers will establish local procedures to ensure that their SOS provider records are updated to maintain a <u>minimum 90 percent</u> NAVY 311 Program objective for BOTH accuracy (POC name, telephone, email, Subject ID & Commodity) AND comprehensiveness (i.e., less than a 10 percent incidence of no SPD record being available when demanded for the assignment and routing of a Support Request).

4.5   Record Maintenance

Users will process an online record Change Request whenever the record data is suspect as being inaccurate or no longer valid (e.g., due to program or personnel changes). The record will be highlighted within the SPD as having an open Change Request pending.

The owning Manager from the respective activity will review the change being proposed, as well as any amplifying information provided by the discovering User. The Manager will perform the required follow-up & processing actions within one business day (24 hours) of receiving notification that a Change Request is pending.

The NAVY 311 hub will research, validate and process the Change Request if it remains open after the 24 hour period has concluded. After NAVY 311 has updated the record, a notification will be sent to the SOS Manager for final review and any updates as required.

4.6   Quality Control

The NAVY 311 Data Quality Manager will review SPD record transactions/effectiveness on a regular basis to monitor Community sustainment of the minimum 90% accuracy and comprehensiveness objectives.

The monitoring of SPD records and their maintenance will be accommodated by transactional date/time stamping to facilitate records management and metrics reporting.

Certain data fields in the SPD require some control with regards to formatting. Primarily, the Commodity field must be easily interpreted by the Customer Service Professional as well as the Warfighter. As a means to that end, formatting requirements are as follows:

- **Commodity Name**

    - <u>Spelled Out</u> – May include the Primary Acronym following the explicit name in parenthesis), utilizing authoritative source sources whenever and wherever possible; e.g., CONFIGURATION DATA MANAGERS DATABASE - OPEN ARCHITECTURE (CDMD-OA).

    - <u>Unique</u> – No two commodities shall have the same exact name

    - <u>Specific</u> – Should be detailed enough to make it discernable from others. For example, a Commodity Name of "AIR CONDITIONER" would not be specific enough since one would not know if that refrigerator is on a ship, aircraft or shore facility or otherwise what type of air conditioner it is.

- Standardized – The same commodity should only be in the directory once with a standardized name, vice multiple times with different names from different activities. Alternate names should utilize the Commodity Alias for a single Commodity Name.

- **Commodity Program Name** - Program or Project of Record

- **Provider First Name** - Given name (preferred name) where the "Given Name" is the formal first name of the SOS and "preferred name" is the casual name of the provider; e.g., Robert (Bob).

- **Provider Title** - Should be spelled out (no acronyms) for readability.

4.7 Reports

Subscription reports will be provided and also developed upon request, to facilitate Managers with their responsibilities to monitor change volume, and to help maintain SPD record accuracy & comprehensiveness.

Reports will be generated on a semi-annual basis showing all Commodities (and corresponding SOS points of contact) that have not been referenced in the last two (2) years. SOS managers will have the responsibility of vetting these records and updating them (if necessary) to maintain data integrity.

Appendix A   Acronym List

AOR	Area of Responsibility
AR	Action Request (Remedy® AR System)
ARS	Action Request System
AWN	Automated Work Notification
BMD	Ballistic Missile Defense
CAC	Common Access Card
CCB	Configuration Control Board
CONUS	Continental United States
COTS	Commercial Off the Shelf
CRM	Customer Relationship Management
CSP	Customer Support Professional
DADMS	DON Application and Database Management System
DITPR-DON	DoD Information Technology Portfolio Registry – Department of Navy
DODAAC	Department of Defense Activity Address Code
DS	Distance Support
DS CRM	Distance Support Customer Relationship Management
DSO	Distributed Server Option
eCRM	Enterprise CRM (System)
ECD	Estimated Completion Date
ESSC	Engineering Support Services Contract
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
IT	Information Technology
IUID	Item Unique Identification
JCN	Job Control Number
JFMM	Joint Fleet Maintenance Manual
MFOM	Maintenance Figure Of Merit
NCR	NCR Corporation
NEMAIS	Navy Enterprise Maintenance Automated Information System
NERP	Navy Enterprise Resource Planning
NMRS	Navy Manpower Requirements System
NROWS	Navy Reserve Order Writing System
OCONUS	Outside Continental United States
OEM	Original Equipment Manufacturer
OSD	Office of the Secretary of Defense
OSS	Operational Sequencing System

PESTOMIN	Personnel, Equipment, Supply, Training, Ordnance, Medical, Installations/Facilities, Networks
POC	Point Of Contact
RMC	Regional Maintenance Center
SDE	Shared Data Environment
SEP	System Engineering Plan
SOS	Source Of Support
SOS CRM	Source Of Support Customer Relationship Management
SOVT	System Operation Verification Testing
SPD	Support Provider Directory
SWE	Surface Warfare Enterprise
S/W	Software
TLR	Top Level Requirement
UIC	Unit Identification Code

Appendix B   Telephony Interactive Voice Response /Phone Tree

S- Option 1 - For Supply or Logistics Support including Cash or Check Related Shipboard Systems and FSM-Food Service Management Systems

Option 1 – For Supply or Logistics Support

Option 2 – For Cash or Check Related Shipboard Systems or Programming Support including ATM at Sea, Navy Cash Card, Military Paper Check Conversion or Cash Link II

Option 1 - For ATM@SEA systems or to contact the NCR help desk

Option 2 - For Navy Cash Card holder's assistance

Option 3 - For Navy Cash Card disbursing officer assistance

Option 4 - For Military Paper Check Conversion (MPCC) assistance

Option 5 - For technical support on CA$HLINK II

Option 8 - To return to the previous menu

Option 9 - To repeat these menu options

Option 0 - To speak to a Customer Support Professional

Option 3 – For FSM3 - Food Service Management System

Option 4 – For NAVSUP Business Systems Center support, including NLL, Asset Visibility, One Touch Supply, ACTR, ERMS, OIS, NAVSUP Portal, and Commercial Asset Visibility

Option 8 – To return to the main menu

Option 9 – To repeat this menu

Option 0 – To Speak to a Customer Support Professional

E-Option 2 - For Equipment, Technical, or Maintenance Support

Option 1 – For Aviation-related Maintenance or Technical Support

Option 2 – For Shipboard Equipment, Technical or Maintenance Support including NAVSEA Maintenance, Supply and Logistics Information Systems, and Ship Tech Assists

Option 3 – For SPAWAR System Centers and Navy Expeditionary C4I Systems support

Option 1 - For the SPAWAR SYSTEM CENTER Pacific C4I Help Desk

Option 1 - For TACNET, CND, NMT, and One-Net-Tier-4

Option 2 - For MUOS, JIEDDO, and METOC systems

Option 8 - To repeat these menu options

Option 9 - To return to the previous menu

Option 2 - For the SPAWAR System Center Atlantic C4I Help Desk and TAC MOBILE Helpdesk

Option 3 - For the Integrated Support Center, INFOSEC Technical Assistance Center or the Collaborative Information Management Systems

Option 4 - For Navy Expeditionary C4I Systems technical support

Option 1 - Mobile Ashore Support Terminal & Radar Sonar Surveillance Central/NETC2/BFT

Option 2 - Portable Tactical Radios

Option 3 - Tactical Data Network, Rugged Deployable Satellite (RDSAT), and related ESSC issues

Option 1 - Time-of-Day Working Hours

Option 2 - Time-of-Day After Hours

Option 8 - To repeat these menu options

Option 9 - To return to the previous menu

Option 5 - For NTCSS, OOMA, and NALCOMIS Software issues

Option 1 - For Atlantic Ships

Option 2 - For Pacific Ships

Option 8 - To return to the previous menu

Option 9 - To repeat these menu options

Option 6 - For SPAWAR C4ISR Programs Office, Philadelphia Office Lifelines Help Desk supporting JSIPS-N

Option 8 - To return to the previous menu

Option 9 - To repeat these menu options

Option 4 – For all other Equipment, Technical, or Maintenance Support

Option 8 – To return to the main menu

Option 9 – To repeat this menu

Option 0 – To Speak to a Customer Support Professional

P-Option 3 - For Manpower and Personnel including Travel

Option 1 – For Manpower and Personnel issues including NSIPS

Option 2 – CMS-ID, RHS, NROWS, Travel, DTS or Naval Reserve website issues, Lean SIX SIGMA, CPI tools and NMRS

Option 3 – For all other career related support such as information on Navy career programs, policies, pay and benefits

Option 8 – To return to the main menu

Option 9 – To repeat this menu

Option 0 – To Speak to a Customer Support Professional

T-Option 4 - For Training and Education

Option 1 – For help with NKO or Navy E-Learning

Option 2 – For Electronic Training Jackets, Navy Training Management Planning System

Option 3 – CNATRA (Chief of Naval Aviation Training)

Option 4 – NETC (Navy Education Training Command)

Option 8 – To return to the main menu

Option 9 – To repeat this menu

Option 0 – To Speak to a Customer Support Professional

I/F-Option 5 - For Installations and Facilities

Option 1 – For CNIC or integrated shore capability support such as Base Support, ELMR, Wireless Peers, TELCOM & Shore Software or Application Support

Option 2 – ATFP (Anti-Terrorism / Force Protection)

Option 3 – For Naval Facilities support including Military Construction, Energy and Utilities, Expeditionary Equipment, and other related areas

Option 8 – To return to the main menu

Option 9 – To repeat this menu

Option 0 – To Speak to a Customer Support Professional

N-Option 6 - NMCI, ONENET, Navy ERP, DADMS / DITPR-DON, or NEMAIS Support

    Option 1 – For NMCI

    Option 2 – ONE-NET

        Option 1 – European Union

        Option 2 – Far East

        Option 3 – Middle East

        Option 8 – To return to the main menu

        Option 9 – To repeat this menu

        Option 0 – To Speak to a Customer Support Professional

    Option 3 – For Navy ERP

    Option 4 – DADMS / DITPR-DON

    Option 5 – For NEMAIS Customer Support Center

    Option 8 – To return to the main menu

    Option 9 – To repeat this menu

    Option 0 – To Speak to a Customer Support Professional

M-Option 7 - For Navy Medicine, including Navy Medicine Information Systems Support, and Spiritual Support from Chaplain Care

    Option 1 – For Navy Medicine including Bureau of Medicine

    Option 2 – For Navy Medicine Information Systems Support

    Option 3 – For Spiritual Support - Chaplain Care

    Option 8 – To return to the main menu

    Option 9 – To repeat this menu

    Option 0 – To Speak to a Customer Support Professional

O-Option 8 - For Ordnance Support

    Place holder, calls going to the NAVY 311 hub

Option 9 – To repeat these menu options

Option 0 – For Distance Support Assistance Other than Navy or if you did not hear your option, press 0 to Speak to a Customer Support Professional

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Distance Support (DS)

Customer Relationship Management (CRM)

NAVY 311

Business Rules Technical Addendum

Release 5.0, Version 1.0

25 November 2014

Tech Addendum Change Record

Date	Version	Change Summary
25 Nov 14	1.0	Baseline Draft

Terms Used in this Document

Acknowledgement: Refers to an automatic system-generated transaction (or return receipt) back to the originating site for confirmation that they have received a transferred request.

Action Request System: A software application developed by BMC Software that is used for tracking support requests throughout the Navy Distance Support Program.

ARS: See "Action Request System"

Branch of Service: The particular division of the armed forces (Army, Navy, etc.) that a customer is affiliated with.

Commodity: Refers to the product, service or system that a customer is looking for support on.

Copy: Refers to a duplicate transaction of a support request sent by a site to the Enterprise Customer Relationship Management application for centralized monitoring, analysis and reporting.

Data Element: See "Field"

Department of Defense Activity Address Code: A six-character, alpha-numeric code that uniquely identifies a DoD unit, activity, or organization. A unit, activity, or organization may have more than one DoDAAC for different authority codes or purposes. Each activity that requisitions, contracts for, receives, has custody of, issues, or ships DoD assets, or funds/pays bills for materials and/or services is identified by a six-position alphanumeric DoDAAC.

Destination: The site that currently owns a support request or is the intended recipient of a transferred support request, identified by a four-digit site code.

Dialog Box: A type of window used to enable reciprocal communication or "dialog" between the Action Request System and the user. It may present information to the user, prompt the user for a choice or response, or both.

Distributed Server Option: A feature of the Action Request System that allows servers to communicate with each other.

DODAAC: See "Department of Defense Activity Address Code"

DSO: See "Distributed Server Option"

ECRM: See "Enterprise Customer Relationship Management"

EDIPI: See "Electronic Data Interchange Personal Identifier"

Electronic Data Interchange Personal Identifier: A unique 10-digitl number assigned to Department of Defense personnel, located in the barcode on the front of a Common Access Card (CAC), the barcode on the back of the card, and in the integrated circuit chip embedded in the card itself. This number is used for authentication and identification within the Distance Support Program.

Enterprise Customer Relationship Management: The "hub" instance of the Action Request System that receives copies of support requests for monitoring, analysis and reporting; and also facilitates the transfer of requests between sites.

Field: A space in a database form allocated for a particular item of information. A tax form, for example, contains a number of fields: one for your name, one for your Social Security number, one for your income, and so on.

Form: A collection of fields in the Action Request System. It contains a combination of the underlying table (or schema) of information stored in the database and the views of the information presented on a screen to the user.

Handshake: See "Acknowledgement"

Hop: Refers to a single support request transfer from one site to another (including a transfer of ownership).

Look-Up Table: An Action Request System form that is used to present a user with choices for population of a character field. The choice of data is typically presented using either in a menu or dialog box.

OpenSSL: An open-source cryptographic application that uses the Secure Socket Layer (SSL) and Transport Layer Security (TLS) protocols. This application is supported by NAVY 311 and the Open Software Foundation (OSF) under a support contract with NAVY 311.

Origin: The site that currently owns a support request or is the originator of a transferred support request, identified by a four-digit site code.

Ownership History: A field on the Support Request that tracks which sites once owned the request, so that an Update transaction can be submitted to that site anytime the request is modified.

Pull-Down Menu: For fixed value selection fields and character fields, this refers to the triangle symbol next to the field that allows the user to click on it and pull-down a list of menu values to choose from. These menus call be single or multiple tiers deep.

Rate/Rank/Salutation: The hierarchical relationship in the armed forces (CAPT, LT, etc.), which may including the rating in some branches (BM2, IT1, etc.), or the salutation for civilians (MR, DR, etc.).

Satisfaction Survey: A brief survey of questions presented to a customer upon resolution or closure of their support request, used to determine their level of satisfaction with the support that they have received and provide comments. It is a valuable source of information to identify and celebrate strengths, as well as to determine where providers may need to focus on improvement.

Site: A participant that has an instance of a support request application that ties into the Shared Data Environment.

SOS: See "Support Provider"

Source of Support: See "Support Provider"

S-Tunnel: A third party application, build on OpenSSL, that is used to encrypt and redirect Distributed Server Option communications between Action Request System servers throughout the Shared Data Environment. This application is supported by NAVY 311 and the Open Software Foundation (OSF) under a support contract with NAVY 311.

Subject ID: Also known as Operational Categories in some applications, these refer to how you support the Commodities in an environment, or "operationally" how you deal with them.

Support Provider: An activity or individual that is identified as a provider of support to customers for a given Commodity (or Commodities). May also be referred to as a Source of Support (SOS).

Support Request: A single record, identified by a Tracking Number, that is recorded and managed in the Action Request System and Shared Data Environment, and identifies a request from a customer for assistance.

Shared Data Environment: The collection of sites that share support request data to the Enterprise Customer Relationship Management instance for centralized monitoring, analysis and reporting.

Transfer: A support request that is being sent from one site or Support Provider to another, at the same time delegating ownership of the record from the origin to the destination site.

Unit Identification Code (UIC): A unique alpha-numeric code assigned to all Navy activities. It is a means of identifying activities, and it is necessary to conduct financial and manpower transactions.

Update: The process of sending a copy of a support request from the current site that owns it to another site because that other site is either the originator of the request or once owned it and retains a copy of it. Without updates, a copy of a support requests at sites other than the owner would remain stale and never closed.

Work History: A field that is a running log of all of the work that has been done on a support request, events that have occurred, or any other pertinent text-based information. In the

Action Request System, this is a special field called a Diary field which date/time stamps each entry with the login name of the user that submitted them.

Workflow: Within the Action Request System, refers to application code that performs various actions in the process of managing a support request. This may include enforcing field population, routing requests, sending notifications, etc.

1 INTRODUCTION

This Technical Addendum is a supplement to the NAVY 311 Source of Support Business Rules. The following sections provide supporting technical information on the Shared Data Elements and their use in the Shared Data Environment, including how sites participate.

2 THE SHARED DATA ENVIRONMENT

The Shared Data Environment is a network of support request and system maintenance action tracking applications that share data to a central environment, the Enterprise Customer Relationship Management (ECRM) system. These applications are depicted in the figure below, and include both Remedy and non-Remedy based applications.
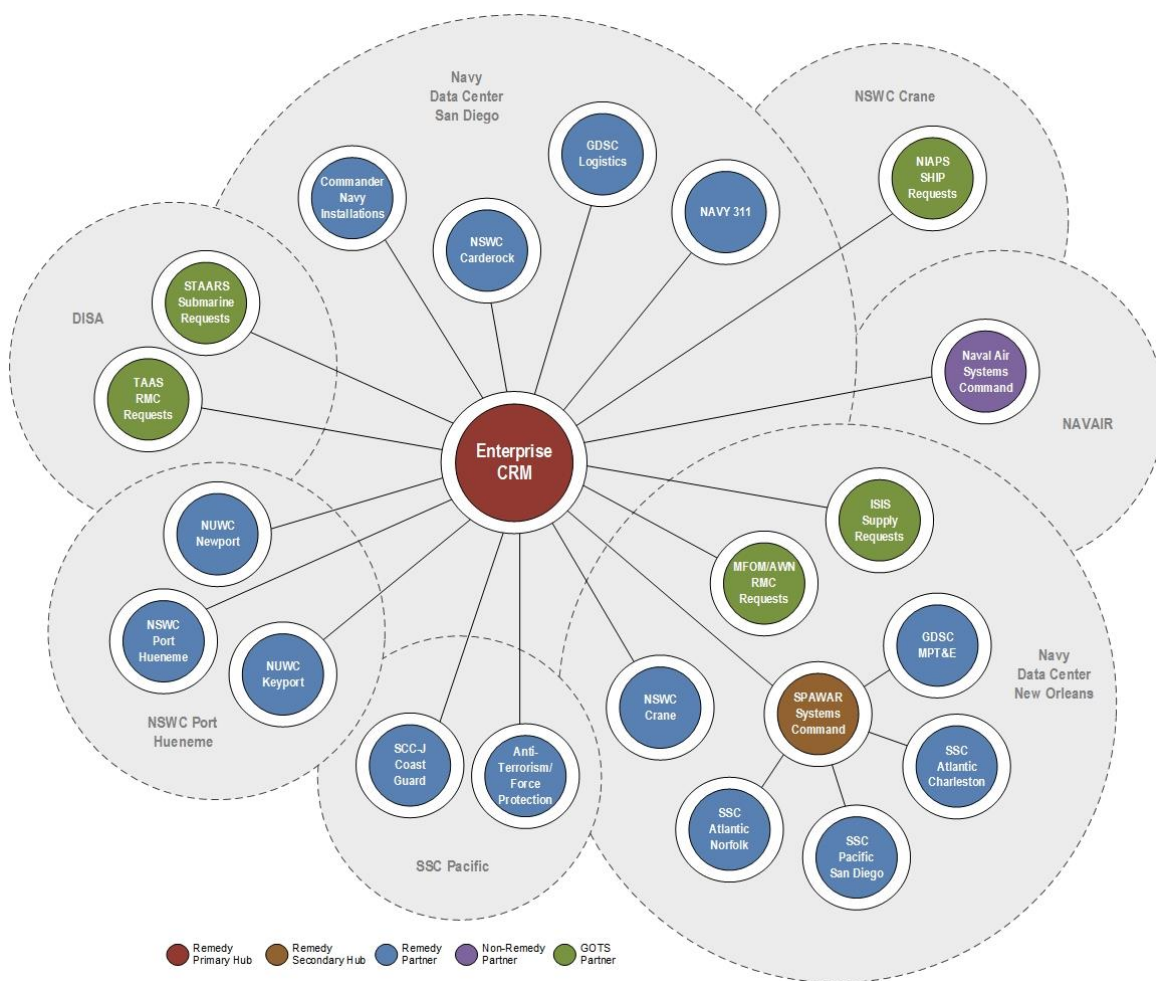
The transfer of data between these applications and the ECRM is accomplished using various methods. These include native Remedy communications via the BMC Remedy Distributed Server Option (DSO), web services (SOAP/XML), automated file transport (such as Axway Secure Transport Client) and file uploads. See Section "8" for additional details.

Shared Data

In addition to the main Support Request form, various other supporting forms are shared between the ECRM and a remote site in the Shared Data Environment. These include ones that provide the supporting look-up data values for certain fields (such as the Customer Demographics, Consolidated Activities, Subject ID's, Commodities and Support Providers), and others that collect or process supporting information (such as the Status History, Work History Update and Satisfaction Survey).
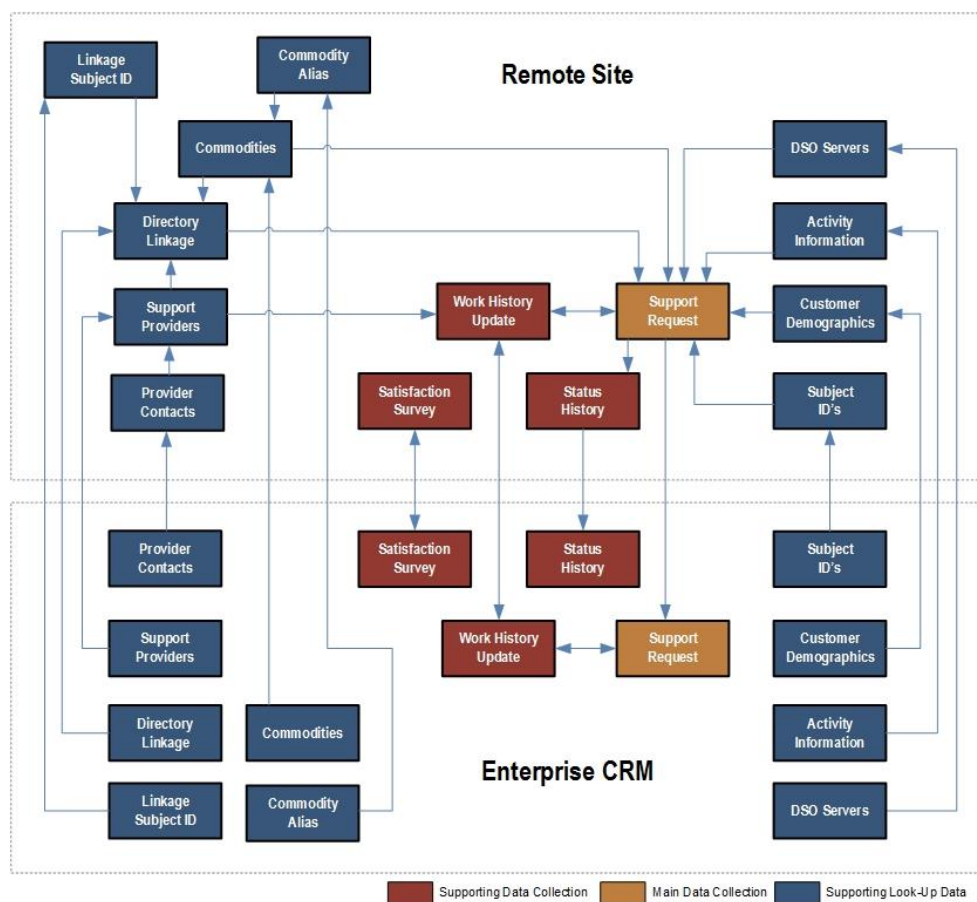
In order for the disparate applications to communicate and share data, the applications must achieve a certain level of compatibility. Therefore, all of the shared forms have a set of like shared fields, with matching types and sizes.

3 APPROVED FORMS AND FIELDS

The support request fields are categorized in "levels" based on when they are used and who they are used by. These levels are described in the following:

Level	Description
1	Level "1" are fields that are populated during the process of entering a new support request, and are the focus for support requests at Tier 0 (customer level) or Tier 1 (help desk level). They exist at and are shared throughout the entire Distance Support community and are governed by the Distance Support Business Rules for everyone in the community.
2	Level "2" are fields that are populated during the process of working, resolving and closing a support request. Although often utilized by Tier 1, they are the focus for requests at Tier 2 (subject matter expert), Tier 3 (engineering) or Tier 4 (outside vendors). They exist at and are shared throughout the Distance Support community and are governed by the Distance Support Business Rules for everyone in the community.
3	Level "3" are supplemental fields that are intended for use and populated by certain organizations (commands, divisions or functional areas) within the Navy and may be a focus at any support tier. They only exist at and shared by those organizations and are governed by the Distance Support Business Rules only for those organizations. An example would be a data element that is only used by a particular SYSCOM or one for a site that works within in the "E" area PESTOMIN.
4	Level "4" are supplemental fields that are intended for use and populated by a single organization, and may be a focus at any support tier. They only exist locally at a certain organization and not shared by that organization and are not governed by Distance Support Business Rules.
T	Level "T" fields are the technical fields that are used throughout the Shared Data Environment to support the data replication, transfer and ownership process.

As shown in Section "2", various forms are used to share data throughout the Shared Data Environment. A description of each and its purpose is provided in the table below:

Level	Description
Commodity	This form is populated from the Support Provider Directory and provides the look-up list of the products, services or systems that are being supported in a Support Request. This form is an foundational part of the Support Request and Support Provider Directory and drives value in metrics and reporting.
Commodity Alias	This form is populated from the Support Provider Directory and provides alternative names for a Commodity, used in searches to assist the user with finding the appropriate Commodity within the Support Provider Directory and on a Support Request.
Consolidated Activities	This form provides the look-up list of a customer or source of supports location, and includes information from various Navy and Department of Defense sources, such as the Department of Defense Activity Address Code (DODAAC), the Defense Financial and Account Service (DFAS) Unit Identification Code (UIC) List and the Standard Navy Distribution List (SNDL).
Customer Demographics	This form contains customer or support personnel classification information, such as their Branch of Service, Rate/Rank/Salutation and Military Pay Grade and provides the look-up list for these fields on the Support Request and Support Provider forms.
Directory Linkage	This form is populated from the Support Provider Directory and provides the linkage of a Commodity to a Support Provider and supports the look-up of such information on a Support Request.
Directory Linkage Subject ID	This form is populated from the Support Provider Directory and provides the list of Subject ID's that a Support Provider supports for a given Commodity, and is a support form for the Directory Linkage form.
DSO Servers	This form provides the codes for the various sites in the Navy Shared Data environment and the look-up list for the DSO Origin and DSO Destination fields on the Support Request form (which track Support Request ownership, transfers and receipt acknowledgement).
Satisfaction Surveys	This form collects satisfaction survey results from the participants in the Shared Data Environment collecting this information, supporting metrics and reporting.

Status History	This form collects the changes in the Status field on a Support Request and enables more detailed metrics and reporting.
Subject ID	This form provides the look-up list for the Subject ID-Pre and Subject ID-Post fields on a Support Request.
Support Provider	This form is populated from the Support Provider Directory and provides the list of support personnel that support one or more Commodities.
Support Provider Contacts	This form is populated from the Support Provider Directory and provides the list of contacts for a given Support Provider.
Support Requests	This form collects, stores and brokers customer incidents or support requests from various activities across the Navy Shared Data Environment.
Work History Update	This form collects an update from a site within the Navy Shared Data Environment that does not own a particular Support Request (and therefore cannot modify it). The update is transferred through the ECRM to the owner where it is pushed into the Work History field on the support request.

The list of fields contained in each form are outlined in the following tables. The list includes the field type, size, engineering change release that they were introduced or last changed in, and any comments that might be helpful.

Support Requests

▼ = menu driven field, ✚ = look-up table driven field, ★ = syntax checked field, **L** = field level, **R** = last change release

Field	Size	Type	Required	Comments	L	R
APL ✚	13	Character	If Ship Equip		3	6
CASREP DTG ★	14	Character	If CASREP		1	--
Commodity Identifier		Character			1	5
Commodity Identifier Type ▼		Character			1	5
Commodity Name ✚		Character	Always		1	5
Customer Activity Name ✚	100	Character	Always		1	--
Customer Branch of Service ▼		Character	Always		1	5
Customer EDIPI ★	10	Character			1	5
Customer Email Address ★	50	Character	If No Phone		1	3
Customer First Name	30	Character	Always		1	--
Customer Last Name	30	Character	Always		1	--
Customer Middle Initial ▼	3	Character	Always		1	--
Customer Military Pay Grade ▼		Character	If Military		1	5
Customer Military Status ▼		Character	If Military		1	5
Customer Preferred Contact ▼	n/a	Selection	Always		1	4
Customer Phone ★	30	Character	If No Email		1	4
Customer Rate/Rank/Salutation ▼		Character	Always		1	5
Customer Service Type ▼		Character	Always		1	5
Customer Survey Date	n/a	Date/Time	If Surveyed		2	5
Customer UIC ✚	8	Character	Always		1	--
Date/Time Open	n/a	Date/Time	Always		1	--
DSO Counter	n/a	Integer		See Section "8"	T	3
DSO Destination ▼	4	Character	Always	See Section "8"	T	3

Use or disclosure of this data is subject to the restrictions on the cover page.

DSO Number of Hops	n/a	Integer		See Section "8"	T	4
DSO Origin ▼	4	Character	Always	See Section "8"	T	3
DSO Ownership History	128	Character		See Section "8"	T	3
DSO Transaction Log	n/a	Diary		See Section "8"	T	3
DSO Update Direction	4	Character	Always	See Section "8"	T	3
EIC ✚	7	Character	If Ship Equip		3	6
Estimated Completion Date	n/a	Date/Time	On Pending		2	--
IUID ★	50	Character			3	1
Job Control Number (JCN) ★	13	Character	If Ship Equip		1	4
Method of Request ▼	n/a	Selection	Always		1	--
Nomenclature ✚	250	Character	If Ship Equip		3	6
Noun Name ✚	250	Character	If Ship Equip		3	6
Pending Reason ▼	n/a	Selection	If Pending	Was 'Long Term Issue Code'	2	5
Priority ▼	n/a	Selection	Always		1	--
Problem Description	4000	Character	Always		1	--
Problem Resolution	2000	Character	At Rec Close/Closed		2	--
Problem Subject	128	Character	Always		1	--
Software Release Version	30	Character			3	--
SOS Activity Name	69	Character	Always		2	4
SOS Email Address ★	50	Character	Always		2	4
SOS First Name	30	Character	If Individual		2	4
SOS Group Name	69	Character	Always		2	4
SOS Last Name	30	Character	If Individual		2	4
SOS Middle Initial ▼	3	Character	If Individual		2	4
SOS Phone ★	30	Character	Always		2	4
SOS UIC ✚	8	Character	Always		2	4
Status ▼	n/a	Selection	Always		1	5
Status Date - Assigned	n/a	Date/Time	Status >= Assigned		2	5
Status Date - Cancelled	n/a	Date/Time	Status = Cancelled		2	5
Status Date - Closed	n/a	Date/Time	Status = Closed		2	5
Status Date - In Progress	n/a	Date/Time	Status >= In Progress		2	5
Status Date - Pending	n/a	Date/Time	Status = Pending		2	5
Status Date - New	n/a	Date/Time	Always		1	5
Status Date - Recommend Close	n/a	Date/Time	At Rec Close/Closed		2	5
Status Date - Transferred	n/a	Date/Time	Status = Transferred		2	5
Subject ID - Post ▼	n/a	Character	At Rec Close/Closed		2	5
Subject ID - Pre ▼	n/a	Character	Always		1	5
Tracking Number	15	Character	Always		1	--
Touch Time (Minutes)	n/a	Integer			2	3
Type of Assistance ▼	n/a	Selection	At Rec Close/Closed		2	--
User Modified Date	n/a	Date/Time	Always		1	4

When Reported?	n/a	Date/Time	Always		1	2
Work History	n/a	Diary			2	--

Activity Information

▼ = menu driven field, ✚ = look-up table driven field, ★ = syntax checked field, **R** = last change release

Field	Size	Type	Required	Comments	R
Activity ID	15	Character	Always		3
Activity Name	100	Character	Always		3
Address 1	150	Character	Always		3
Address 2	150	Character			3
Address 3	150	Character			3
Address 4	150	Character			3
Address Type	5	Character	On DODAAC		3
Branch of Service	20	Character	Always		3
City	50	Character			3
Country	30	Character			3
Source	15	Character	Always		3
State	10	Character			3
Status	n/a	Selection			3
Zip Code	15	Character			3

Work History Update

▼ = menu driven field, ✚ = look-up table driven field, ★ = syntax checked field, **R** = last change release

Field	Size	Type	Required	Comments	R
DSO Destination ▼	4	Character	Always		3
Related Tracking Number	15	Character	Always		3
SOS Activity Name	69	Character	Always		3
SOS Email	50	Character	Always		3
SOS First Name	30	Character	If Individual		3
SOS Last Name	30	Character	If Individual		3
SOS Middle Initial ▼	3	Character	If Individual		3
SOS Phone	30	Character	Always		3
SOS UIC	8	Character	Always		3
Tracking Number	15	Character	Always		3
Update Description	4000	Character	Always		3

DSO Servers

▼ = menu driven field, ✚ = look-up table driven field, ★ = syntax checked field, **R** = last change release

Field	Size	Type	Required	Comments	R
DSO Destination	4	Character	Always		3
DSO Routing Server	4	Character			3
DSO Server ID	15	Character	Always		3
SOS Activity Name	69	Character	Always		3
Status	n/a	Selection	Always		3

Status History

▼ = menu driven field, ✚ = look-up table driven field, ★ = syntax checked field, **R** = last change release

Field	Size	Type	Required	Comments	R
DSO Origin ▼	4	Character	Always		3
Minutes	n/a	Integer			3
New Pending Reason ▼	n/a	Selection			5
New Status ▼	n/a	Selection			5
New Status Date/Time	n/a	Date/Time			3
Previous Pending Reason ▼	n/a	Selection			5
Previous Status ▼	n/a	Selection	Always		5
Previous Status Date/Time	n/a	Date/Time	Always		3
Related Tracking Number	15	Character	Always		3
Tracking Number	15	Character	Always		3

Customer Demographics

▼ = menu driven field, ✚ = look-up table driven field, ★ = syntax checked field, **R** = last change release

Field	Size	Type	Required	Comments	R
Branch of Service	20	Character	Always		5
Demographics ID	15	Character	Always		5
Service Type	16	Character	Always		5
Rate/Rank/Salutation	12	Character	Always		5
Rate/Rank/Salutation Description	100	Character	Always		5
Military Status	16	Character	Always		5
Military Pay Grade	10	Character	Always		5
Designator	n/a	Selection			5
Status	n/a	Selection	Always		5

Use or disclosure of this data is subject to the restrictions on the cover page.

Subject ID

▼ = menu driven field, ✚ = look-up table driven field, ★ = syntax checked field, **R** = last change release

Field	Size	Type	Required	Comments	R
Keywords	255	Character			5
Old Subject ID Code	n/a	Selection			5
Old Subject ID Enumeration	n/a	Integer			5
Subject ID Code	100	Character	Always		5
Subject ID Number	15	Character	Always		5
Subject ID Tier 1	50	Character	Always		5
Subject ID Tier 2	50	Character	Always		5
Subject ID Tier 3	50	Character			5
Status	n/a	Character	Always		5

Satisfaction Surveys

▼ = menu driven field, ✚ = look-up table driven field, ★ = syntax checked field, **R** = last change release

Field	Size	Type	Required	Comments	R
Comments	2000	Character		Customer provided comments, if any	3
DSO Origin ▼	4	Character	Always		3
Question 1 Response	n/a	Selection	Always	Support courteous/professional	3
Question 2 Response	n/a	Selection	Always	Customer kept informed of their request	3
Question 3 Response	n/a	Selection	Always	Request resolved in a timely manner	3
Question 4 Response	n/a	Selection	Always	Support knowledgeable/understood	3
Question 5 Response	n/a	Selection	Always	Customer provided a tracking number	3
Related Tracking Number	15	Character	Always		3
Survey Create Date/Time	n/a	Date/Time	Always		3
Survey Tracking Number	15	Character	Always		3

Directory Linkage

▼ = menu driven field, ✚ = look-up table driven field, ★ = syntax checked field, **R** = last change release

Field	Size	Type	Required	Comments	R
Authority Agent	250	Character	Always		5
Commodity ID	15	Character	Always		5
Directory Linkage ID	15	Character	Always		5
GUID	36	Character	Always		5
Provider ID	15	Character	Always		5
Provider Role	20	Character	Always		5
Provider Scope	128	Character			5
Provider Remarks	255	Character			5
Status	n/a	Selection	Always		5
Support Website URL	256	Character			5
Visible to Public	n/a	Selection			5

Directory Linkage Subject ID List

▼ = menu driven field, ✚ = look-up table driven field, ★ = syntax checked field, **R** = last change release

Field	Size	Type	Required	Comments	R
Directory Link GUID	36	Character	Always		5
Directory Link ID	15	Character	Always		5
Request ID	15	Character	Always		5
Subject ID Code	100	Character	Always		5
Subject ID Number	15	Character	Always		5
Status	n/a	Selection	Always		5

Commodity Alias

▼ = menu driven field, ✚ = look-up table driven field, ★ = syntax checked field, **R** = last change release

Field	Size	Type	Required	Comments	R
Commodity Alias ID	15	Character	Always		5
Commodity Alias Name	60	Character	Always		5
Commodity ID	15	Character	Always		5
Commodity Name	60	Character	Always		5
Status	n/a	Selection	Always		5

Commodity

▼ = menu driven field, ✚ = look-up table driven field, ★ = syntax checked field, **R** = last change release

Field	Size	Type	Required	Comments	R
Authority Agent	250	Character	Always		5
Category Tier 1	60	Character	Always		5
Category Tier 2	60	Character	Always		5
Category Tier 3	60	Character			5
Commodity ID	15	Character	Always		5
Commodity Name	60	Character	Always		5
Commodity Comments	400	Character			5
PESTOMIN Code	1	Character	Always		5
Program Name	100	Character	Always		5
Program Office	12	Character			5
Status	n/a	Selection	Always		5

Support Provider

▼ = menu driven field, ✚ = look-up table driven field, ★ = syntax checked field, **R** = last change release

Field	Size	Type	Required	Comments	R
Authority Agent	250	Character	Always		5
Provider Activity Name	100	Character	Always		5
Provider Branch of Service	20	Character	Always		5
Provider Code	8	Character			5
Provider Comments	400	Character			5
Provider Default Role	20	Character	Always		5
Provider DSO Destination	4	Character	Always		5
Provider First Name	30	Character	If Individual		5
Provider Group Name	50	Character	Always		5
Provider ID	15	Character	Always		5
Provider Last Name	30	Character	If Individual		5
Provider Middle Initial	3	Character	If Individual		5
Provider Military Pay Grade	10	Character	Always		5
Provider Military Status	16	Character	Always		5
Provider Rate/Rank/Salutation	12	Character	Always		5
Provider Service Type	16	Character	Always		5
Provider Title	50	Character	Always		5
Provider UIC	10	Character	Always		5
Provider Website URL	256	Character			5
Status	n/a	Selection	Always		5

Use or disclosure of this data is subject to the restrictions on the cover page.

Support Provider Contacts

▼ = menu driven field, ✚ = look-up table driven field, ★ = syntax checked field, **R** = last change release

Field	Size	Type	Required	Comments	R
Contact Identifier	69	Character	Always		5
Contact Instructions	1000	Character	Always		5
Contact Type	50	Character	Always		5
Provider Contact ID	15	Character	Always		5
Provider ID	15	Character	Always		5
Status	n/a	Selection	Always		5

4   RETIRED FORMS AND FIELDS

The following fields were in use previously, but have since been deleted or retired (but retained). When data elements are retained on the ECRM forms, they are giving a 'z' prefix. So, for example the 'Date/Time Closed' field becomes 'zDate/Time Closed'. This becomes more import in cases like the 'Subject ID-Pre' where the old one (a Selection field) is retired and renamed with a 'z' prefix and a new one (a Character field) is added to replace it, and it has the same name as the old one. If the 'z' prefix was not added there would be a name conflict.

Support Requests

▼ = menu driven field, ✚ = look-up table driven field, ★ = syntax checked field, **L** = field level, **R** = last change release

Field	Size	Type	Comments	L	R
Customer Designator ▼	n/a	Selection	Retained, but retired	1	5
Customer POC	50	Character	Retained, but retired	1	2
Date/Time Closed	n/a	Date/Time	Retained, but retired	2	2
Sending Server ▼	n/a	Selection	Retained, but retired	T	3
SOS Server ▼	n/a	Selection	Retained, but retired	T	3
Status Counter–Assigned	n/a	Integer	Deleted	2	1
Status Counter–Cancelled	n/a	Integer	Deleted	2	1
Status Counter–Closed	n/a	Integer	Deleted	2	1
Status Counter–In Progress	n/a	Integer	Deleted	2	1
Status Counter–Long Term Issue	n/a	Integer	Deleted	2	1
Status Counter–Recommend Close	n/a	Integer	Deleted	2	1
Status Counter–Reopened	n/a	Integer	Deleted	2	1
Status Counter–Transferred	n/a	Integer	Deleted	2	1
Status Date - Reopened	n/a	Date/Time	Retained, but retired	2	5
Subject ID-Post ▼	n/a	Selection	Retained, but retired	2	5
Subject ID-Pre ▼	n/a	Selection	Retained, but retired	1	5
TYCOM Resolution ▼	n/a	Selection	Retained, but retired	2	1
Ship Squad Type/Number	10	Character	Retained, but retired	1	1

5   LOOKUP LIST FIELDS/SYNTAX CHECKING

Many of the fields are populated via look-up lists (a separate form in the application that contains a list of valid values that the user must select from) or syntax checking (the data must be entered in a specific format which is enforced by the application). These are explained in more detail below.

APL, EIC, Noun Name and Nomenclature

These fields are looked up and populated via system configuration information contained in the Configuration Data Managers Database - Open Architecture (CDMD-OA) application. The APL and Noun Name are at a part level and the EIC and Nomenclature at a system level.

NAVY 311 can make this data available for distribution from ECRM to sites for proper population of these fields. Also, NAVY 311 is working to compile a cross-reference of each of these configurations to a Commodity in the Support Provider Directory.

CASREP DTG

This field represents the initial date of a Casualty Report (CASREP) from the naval message, if one initiated the support request. This date is required to be in military date time group format, as DDHHMMZMONYY.

DD	Day of the month (e.g. January 6th = 06)
HHMM	Time in 24 hour format (e.g. 6:30pm = 1830).
Z	Military identifier for Zulu/Greenwich Mean Time
MON	3 digit month code (e.g. January = JAN)
YY	2 Digit year (e.g. 2012 = 12)

This example is 6:30pm Zulu time on January 6th, 2012 and would read as 061830ZJAN12 in the CASREP DTG field.

Commodity Name

The Commodity Name is the product, service or system that the support request is associated with. This information must be selected from the list of Commodity Names contained within the Support Provider Directory.

Customer Activity Name, Customer UIC, SOS Activity Name and SOS UIC

The combination of Activity Name and UIC, for either the customer or source of support (SOS), must be selected from the Consolidated Customer Activity list shared out from the ECRM. This list is compiled from various authoritative sources of Unit Identification Code with the Navy and Department of Defense (DoD), including the Department of Defense Activity Address Code (DoDAAC) list, the Defense Finance and Accounting Services (DFAS) Navy UIC list and the Standard Navy Distribution List (SNDL).

Customer EDIPI

If this field is populated, it must be populated with the customer's Electronic Data Interchange Personal Identifier (EDIPI), which is a ten digit reference number generated by the Defense Enrollment and Eligibility Reporting System (DEERS) system and contained on their DoD Common Access Card (CAC). This number is printed on newer cards under a label of "DoD ID Number". This field is used to uniquely identify a customer and their requests throughout the SDE, and enables NAVY 311 self-service technologies, whereby the customer can access self-service applications with their CAC card and see all of their requests.

Customer Email Address and SOS Email Address

The email address, for both the customer and SOS, must be checked to ensure that they contain a single and valid email address in an internet standard allowable syntax. A source for formal definitions can be found in RFC 5322 (sections 3.2.3 and 3.4.1) and RFC 5321 – with a more readable form given in the informational RFC 3696[3] and the associated errata. NAVY 311 provides an example Remedy application with example code and an example approach for syntax checking.

Customer Phone and SOS Phone

The phone, for both the customer and SOS, must be checked to ensure that it contains a valid number within the standard set forth (which models and is compatible with the out-of-the-box BMC Remedy Information Technology Service Management (ITSM) application). The syntax for valid values would be:

> **{**Country Code**} {**Area Code**} {**Exchange**}-{**Number**}**
> **{**Country Code**} {**Area Code**} {**Exchange**}-{**Number**} ({**Extension**})**
> **DSN {**Area Code**} {**Exchange**}-{**Number**}**
> **DSN {**Area Code**} {**Exchange**}-{**Number**} ({**Extension**})**

Examples of valid values within this syntax would be "1 703 555-1212 (1234)", "1 212 555-1212", "DSN 312 555-1212 (1234)" or "DSN 555 555-1212".

IUID

This field provides a space to enter IUID of an asset associated with a support request, if applicable. The Item Unique Identification (IUID) is a unique reference assigned to a DoD asset to distinguish it across various asset management systems. UID policy requires that any qualifying DoD item is registered in the IUID registry and permanently marked with this information so that it may be tracked throughout its lifecycle. The IUID must be checked to ensure that it meets the syntax of a registered asset in the IUID registry.

Job Control Number (JCN)

The JCN is a number assigned to a registered maintenance action on a Navy vessel, and must be checked to ensure that it contains a valid value. The syntax for a valid JCN would be:

{5 Digit UIC**}{**4 Digit Work Center**}{**4 Digit Serial**}**

Examples of valid values within this syntax would be 20127CSE1L00I or 3013ACC010261.

6   FIELD LOOK-UP LISTS
The following section covers the look-up list of values in the menu driven fields on the various forms.

Status (Support Request)

Enum	Field Value	Comments
0	New	Request created, but not assigned
1	Assigned	Request assigned to a group or individual
2	In Progress	Request actively being worked by the assignee
3	Pending	Request waiting for some outside action for work to proceed
4	Recommend Close	Resolution provided to customer, waiting for customer confirmation
5	Closed	Customer confirmed acceptance of resolution, or assumed after 14 days
6	Cancelled	Request cancelled due to error, duplication or customer withdrawal
7	Transferred	Request in the process of being transferred between sites

Priority

Enum	Field Value	Comments
0	1	Critical
1	2	Extremely Important
2	3	Important
3	4	Requests

Method of Request

	Field Value	Comments
0	Phone	
1	Secure Phone	
2	E-mail	
3	SIPRNET E-mail	
4	Web	
5	Naval Message	
6	Fax	
7	NIPR Chat/VTC	
8	SIPR Chat/VTC	
9	Onsite Visit (Local)	
10	Onsite Visit (Travel)	
11	Tech Solutions	
12	Written Request	
13	Walk-In	
14	Predictive	
15	Other	
16	Voice Mail	

Customer Preferred Contact Method

Enum	Field Value	Comments
0	Phone	
1	E-mail	

Middle Initial

Field Value	Comments
A	
B	
C	
D	
E	
F	
G	
H	
I	
J	
K	
L	
M	
N	
O	
P	
Q	
R	
S	
T	
U	
V	
W	
X	
Y	
Z	
NMN	Used when a customer or SOS has "No Middle Name"

Subject ID

Due to the large volume of records in this form, please refer to the Technical Shared Data Elements Spreadsheet for the latest list of values. An example record is as follows:

Field	Example Value	Comments
Keywords		
Old Subject ID Code	Hardware - Tech Data - Manuals/Drawings	Used for legacy data mapping/compatibility
Old Subject ID Enumeration	13	
Subject ID Code	Documentation Request – Manual – Reference/Other	
Subject ID Tier 1	Documentation Request	
Subject ID Tier 2	Manual	
Subject ID Tier 3	Reference/Other	

Customer Demographics

Due to the large volume of records in this form, please refer to the Technical Shared Data Elements Spreadsheet for the latest list of values. An example record is as follows:

Field	Example Value	Comments
Branch of Service	Navy	
Service Type	Military	
Rate/Rank/Salutation	PO2	
Rate/Rank/Salutation Description	PETTY OFFICER SECOND CLASS	
Military Status	Active	
Military Pay Grade	E-5	
Designator	E5	Used for legacy data mapping/compatibility

Type of Assistance

Enum	Field Value	Comments
0	Onsite Only	
1	Transition Distance to Onsite	
2	Distance Only	

DSO Servers / Support Request Prefixes

Code	DSO?	Hub?	Status	Comments
SH3M	No	No	Inactive	Ship Maintenance and Material Management
CNIC	Outbound	No	Active	Commander Navy Installations Command
CNIN	Bidrectional	No	Active	Naval Surface Warfare Center Crane IN
CRPH	Bidrectional	No	Active	Naval Surface Warfare Center Philadelphia PA
CRME	Bidrectional	Primary	Active	Enterprise Customer Relationship Management (ECRM)
DLDN	No	No	Inactive	Naval Surface Warfare Center Dahlgren and Dam Neck VA
FTSL	No	No	Inactive	Naval Ship Support Activity Norfolk VA (NSSA)
FTSP	No	No	Inactive	Southwest Regional Maintenance Center San Diego CA (SWRMC)
GDSC	Bidrectional	No	Active	Global Distance Support Center Technical Norfolk VA
GDSL	Bidrectional	No	Active	Global Distance Support Center Logistics San Diego CA
IHMD	No	No	Inactive	Naval Surface Warfare Center Indian Head
ISIS	Yes	No	Active	Integrated Supply Information System
KPWA	Bidrectional	No	Active	Naval Undersea Warfare Center Keyport WA
MFOM	Inbound*	No	Active	Maintenance Figure of Merit/Automated Work Notification (AWN)
NAVY	Outbound	No	Active	NAVY 311 Self-Service
NASC	Inbound*	No	Active	Naval Air Systems Command Patuxent River MD
NGEN	No	No	Inactive	Navy Next Generation Network
NCTL	No	No	Inactive	Naval Computer and Telecommunications Area Master Station Atlantic
NCTP	No	No	Inactive	Naval Computer and Telecommunications Area Master Station Pacific
NFAC	No	No	Inactive	NAVFAC Anti-Terrorism/Force Protection (ATFP)
NICC	No	No	Inactive	Navy Integrated Call Center (now GDSC)
NPRI	Bidrectional	No	Active	Naval Undersea Warfare Center Newport RI
NSBC	No	No	Inactive	Naval Supply Business Systems Center Mechanicsburg PA
PHCA	Bidrectional	No	Active	Naval Surface Warfare Center Port Hueneme CA
RCRP	No	No	Inactive	Naval Expeditionary Combat Command Readiness Cost Reporting Program
RMAS	No	No	Inactive	Regional Maintenance Automated Information System (RMAIS)
SHIP	Inbound	No	Active	From ship via the Navy Integrated Applications Product Suite (NIAPS)
SPAA	Bidrectional	Secondary	Active	Space and Naval Warfare Systems Command (Headquarters)
SPAC	Bidrectional	No	Active	SPAWAR Systems Center Atlantic Charleston SC
SPAF	No	No	Inactive	SPAWAR Fleet Systems Engineering Team (FSET)
SPAM	Bidrectional	No	Active	Sector Command Center Joint Coast Guard
SPAN	Bidrectional	No	Active	SPAWAR Systems Center Atlantic Norfolk VA
SPAO	Bidrectional	No	Active	SPAWAR Systems Center Atlantic New Orleans LA (GDSC MPT&E)
SPAS	Bidrectional	No	Active	SPAWAR Systems Center Pacific San Diego CA
SPAT	Bidrectional	No	Active	NAVFAC Anti-Terrorism/Force Protection (ATFP) (now NFAC)
STRS	Inbound	No	Active	Submarine Technical Assistance and Assessment Reporting System
TAAS	Inbound	No	Active	Regional Maintenance Center Tech Assist Assessments and Scheduling
VSTR	No	No	Inactive	Veteran's Administration

*Indicates limited capability to send or receive transactions. Refer to the Technical Shared Data Elements Spreadsheet for the latest list of values.

Use or disclosure of this data is subject to the restrictions on the cover page.

Pending Reason

Enum	Field Value	Comments
0	Awaiting Platform Availability	
1	Awaiting Technical Personnel	
2	Parts	
3	Documentation	
4	Test Equipment	
5	Operational Sequencing System	
6	Funding	
7	Training	
8	Awaiting Technical Solution	
9	System/Equipment No Longer Supported	
10	Awaiting Software Upgrade	
11	Other	

Status (Other Than Support Request)

Enum	Field Value	Comments
0	Active	
1	Inactive	

Use or disclosure of this data is subject to the restrictions on the cover page.

7 SOFTWARE, VERSIONS AND ACCREDITATION

The following information is provided as a convenience for sites, and is valid as of the last update to the document. However, due to the fluidity of the information from patch updates that address bug fixes and Information Assurance Vulnerability Alerts, sites should contact NAVY 311 to obtain the latest version, including registration and approval information.

DADMS Software Registrations

Software	Version	DADMS
Apache Tomcat		
BMC Atrium Configuration Management Database (CMDB)	7.6.04	83272
BMC Atrium Configuration Management Database (CMDB)	8.1	88669
BMC Atrium Discovery and Dependency Mapping	8.3	82175
BMC Remedy Action Request System	7	60278
BMC Remedy Action Request System	7.6.04	79785
BMC Remedy Action Request System	8.1	88598
BMC Remedy Information Technology Service Management	7.6	77780
BMC Remedy Information Technology Service Management	8.1	86583
BMC Remedy Mobility (formerly Aeroprise)	7.6.04	84143
BMC Remedy Mobility (formerly Aeroprise)	8.1	88616
BMC Analytics for Business Service Management	7.6.01	79772
BMC Analytics for Business Service Management	7.6.04	
BMC Analytics for Business Service Management	7.6.06	88603
BMC Analytics for Business Service Management	8.1	
BMC Dashboards for Business Service Management	7.6.01	79784
BMC Dashboards for Business Service Management	7.6.04	
BMC Dashboards for Business Service Management	7.7.01	88667
OpenSSL	1.0.1E	86012
OpenSSL	1.1.1G	89832
RightStar System PKI Connector for Remedy	1	76442
S-Tunnel	4.53	83311
S-Tunnel	5.0	89814
SAP Business Objects Enterprise XI 3.1	12.2 SP5	83308
SAP Business Objects Business Intelligence	4.0	81695
SAP Business Objects Business Intelligence	4.1	
Microsoft Internet Information Server		
Microsoft SQL Server Enterprise Edition	2008	54908
Microsoft SQL Server Standard Edition	2008	
Microsoft SQL Server Enterprise Edition	2012	
Microsoft SQL Server Standard Edition	2012	
Microsoft Windows Server Enterprise Edition	2008 SP2	81492

Microsoft Windows Server Standard Edition	2008 R2 SP1	82537
Microsoft Windows Server Enterprise Edition	2012	
Microsoft Windows Server Standard Edition	2012	

Enterprise CRM Accreditation

The ECRM Remedy instance is currently hosted and accredited as part of the San Diego Distance Support System (SDSS), with an eMASS of 4339 and Authority to Operate (ATO) expiring on 8-Oct-2016. The DADMS ID for the overall ECRM is 41383 and DITPR-DON registration number for the ECRM is 20956.

8 ECRM/SHARED DATA ENVIRONMENT CONNECTIVITY

The network of interconnected support request tracking applications throughout the Navy Shared Data Environment are mostly built on Remedy, although one non-Remedy and some government built systems participate. The applications all connect to the ECRM instance.

The ECRM instance collects support request copies from all sites within the SDE for metrics and reporting purposes. It also acts as the broker for transferred support requests. For example, if Naval Surface Warfare Center (NSWC) Port Hueneme needs to transfer a support request to the Space and Naval Warfare (SPAWAR) Systems Center (SSC) Pacific in San Diego, the Enterprise CRM instance receives the request from Port Hueneme, forwards it to San Diego, receives receipt acknowledgement from San Diego and forwards that acknowledgement back to Port Hueneme. As San Diego updates and closes the request, the Enterprise CRM receives and forwards those updates as well.

In addition to support requests, the Enterprise CRM receives and/or distributes other shared data with sites, including satisfaction surveys, support provider information, commodity/product listings, activity listings (DODAAC, SNDL, UIC, etc.) and categorization lists (see Section "2").

To enable Remedy to Remedy communication within the Navy Shared Data Environment, a port is added to firewalls between the two Remedy servers and redirection and encryption software (S-Tunnel) is installed on each server. S-Tunnel is then configured with the Department of Defense (DoD) Public Key Infrastructure (PKI) certificate from each server so that the trust is built between the two.
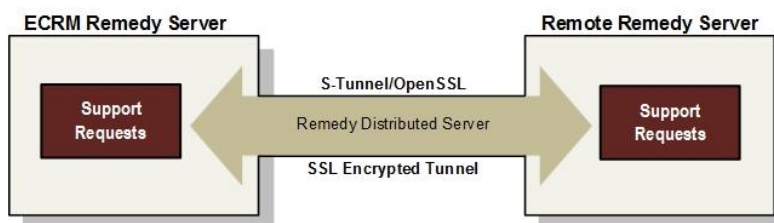
Once S-Tunnel is ready to encrypt traffic, the Remedy Distributed Server Option (DSO) is configured on each server. Standard workflow engineered for the Shared Data Environment is implemented within the Remedy applications that initiates a DSO transaction (explained in more detail below).

Distributed Fields

The following technical fields are used in the process of distributed transactions.

Field	Purpose
DSO Counter	Tracks the number of time a record is replicated in a single day and terminates further replication if a maximum threshold is reached (currently 500). This prevents endless looping of a transaction should some other code not prevent such looping.
DSO Destination	Contains the site code of the destination site for a support request (see Section "6" for a list of values, and further information in this section on Transfers and Ownership).
DSO Number of Hops	Tracks the number of time ownership has changed on a support request, based on the DSO Destination value changing.
DSO Origin	Contains the site code of the origin site for a support request (see Section "6" for a list of values, and further information in this section on Transfers and Ownership).
DSO Ownership History	Contains a list of the site codes that once owned a support request, so that the hub applications can send them copies of the request as the site that now owns them performs updates. Without those copies, a support request could remain open at site indefinitely.
DSO Transaction Log	Contains diary entries of distributed transactions, and the date/time stamp that they occurred. This field is most often used for troubleshooting transfer problems.
DSO Update Direction	Contains the direction that a distributed transaction is originating from, so that the hub applications can differentiate which site traffic is coming from and process it appropriately.

Transfers and Ownership

The technical fields include one to track the origination of a support request (the DSO Origin) and one to track the destination of a support request (the DSO Destination). In addition, there is a DSO Transaction Log field that is a diary containing entries made at each step in the transfer process in order to track the progress of the record.

In the architecture, several different types of distributed transactions occur between the support request on a remote Remedy server and the ECRM. These include:

- Incoming Copy
- Incoming Transfer
- Incoming Copy/Update
- Outgoing Acknowledgement
- Outgoing Transfer

- Outgoing Copy

Most distributed transactions are when a site sends a copy of a support request to the hub for archiving and reporting (this is an Outgoing Copy at the remote site and an Incoming Copy at the hub). However, as described earlier in this section, transactions also occur when a remote site transfers ownership to another remote site and these transfer transactions are brokered by the hub.

When a site owns a support request, both the DSO Origin and DSO Destination fields are equal to their site code. When they wish to transfer the support request to another site, the DSO Destination is set to the site code for the destination site and an Outgoing Transfer transaction is initiated to the hub for relay.

When the request is received by the destination site via an Incoming Transfer transaction, that site sets the DSO Origin to their site code and send an Outgoing Acknowledgement transaction back to the hub for relay to the original site. When the original site receives that Incoming Copy/Update transaction, with a DSO Origin and Destination of the remote site that is their indication that the transfer of ownership was successful. This is referred to as a "handshake".

An example of a transfer from the NAVY 311 Service Desk (site code "GDSC") to Naval Surface Warfare Center Carderock Division in Philadelphia (site code "CRPH") is depicted in the DSO Workflow Diagram below. The DSO Origin and Destination fields begin as GDSC and GDSC, but end up as CRPH once received and confirmed with a handshake.
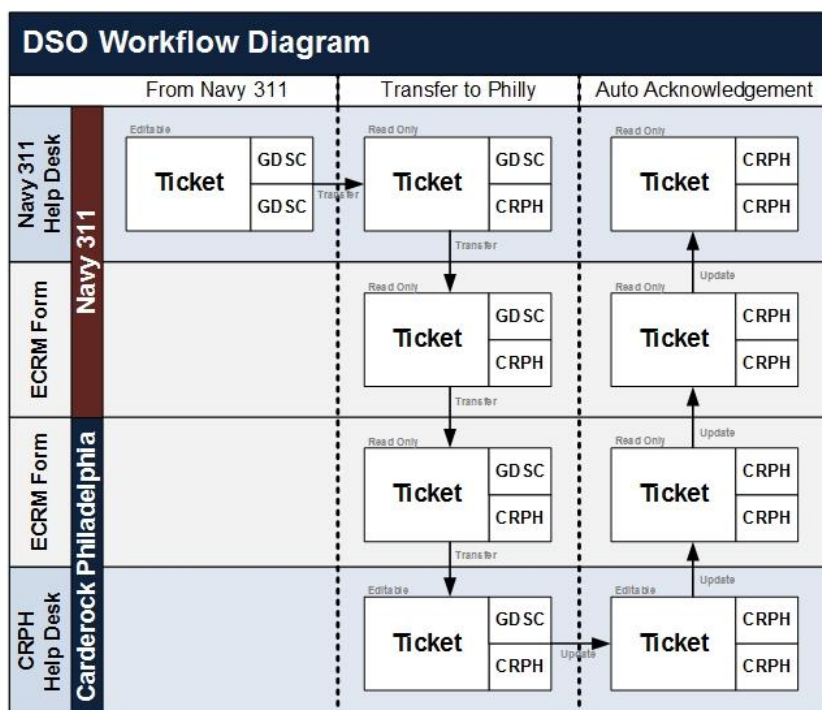
Support requests within the Shared Data Environment that have a different DSO Origin and Destination are monitored as potential "failed transfers" via a daily report generated to the Tech Team (which is suppressed if no failed transfers exist).

Once a support request is transferred, a site no longer has the ability to modify the request. If a site wishes to make an update to a transferred support request for some reason (incorrect transfer, customer update, etc.) the site can submit a Work History Update, explained further below.

Work History Update

In a Work History Update, a site that once had a copy of a support request can submit information that is transferred through the Shared Data Environment to the owner. When the transaction is received at the destination, this information is pushed into the Work History field on the support request. The receiving site should have a notification in place for when this occurs so that they can review and take the appropriate action on the update.

An example of a Work History Update from the NAVY 311 Service Desk to the SCC-J Coast Guard (site code "SPAM") is depicted in the Workflow History Update diagram below. The DSO Origin and Destination on the support request is SPAM and SPAM, and a work history update is generated with a DSO Destination of SPAM. Once received by SCC-J, the information is pushed to the support request.
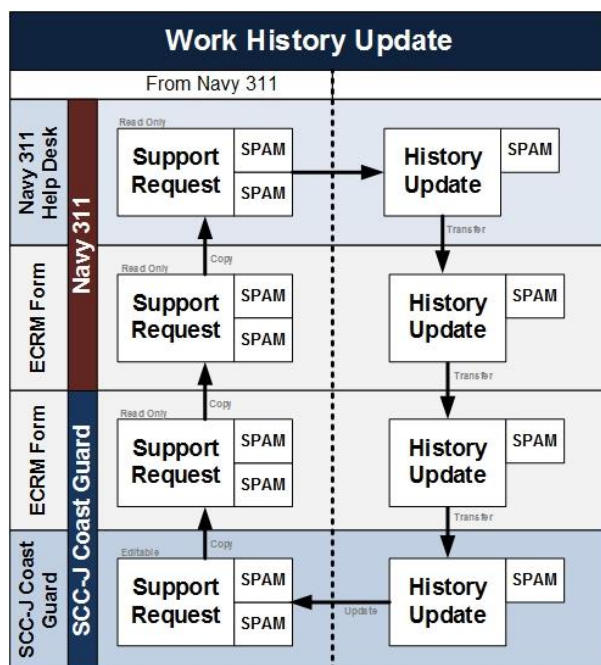
In this example, the NAVY 311 Service Desk will know the Work History Update was successful because they will receive an updated copy of the support request from the SCC-J Coast Guard (because they once owned it).

Security and Accreditation

The NAVY 311 external interface solution enables port communications across Navy boundaries and meets the following Navy security guidelines:

1. The communication is restricted by source and destination filtering (the port opening is restricted by IP address on the firewalls)
2. Application level proxy is used for all traffic (DoD PKI Server certificates are used with S-Tunnel for authentication at both ends)
3. Encryption uses FIPS 140-2 compliant algorithm for sensitive information (S-Tunnel is encrypting using the "Triple DES SHA US" encryption algorithm)
4. DoD PKI Server/Client Certs are used as directed by DOD and DON policy (DoD PKI Server certificates are being used within S-Tunnel at the ECRM and remote sites to generate the encryption and provide trust)

This solution is accredited by Naval Network Warfare Command (NETWARCOM) for use by NAVY 311 (see Section "7").

New Site Connectivity

In order for a new site to connect to the SDE with Remedy, the following steps are performed:

1. The site updates their local accreditation to show the use of S-Tunnel and communications to other Navy Remedy servers over a specified port (provided by NAVY 311 Engineering).
2. The site and NAVY 311 both request and obtain port exception(s) for a specified port between their Remedy servers. These may include the production environment on NIPRNET and/or SIPRNET and quality assurance/test environment on NIPRNET (as applicable).
3. The site works with NAVY 311 to determine the appropriate mapping of data elements between their Remedy applications. Site may be using custom or out-of-the-box Remedy Service Desk applications.
4. The site works with NAVY 311 to install and configure S-Tunnel on their local Remedy server
5. The site works with NAVY 311 to install and configure a deployable Remedy application on their local Remedy server that facilitates the interface with the ECRM application.
6. The site works with NAVY 311 to implement code between their local Remedy application and the ECRM deployable application to share data.

7. The site works with NAVY 311 to test transfers and copies of support requests bidirectional.

For sites that do not use Remedy, communications with the ECRM is possible, but considerably more complex. As such, these connections are handled on a case by case basis.