tsds texas student data system

Texas Education Agency

TSDS INCIDENT MANAGEMENT SYSTEM (TIMS)

User Guide

Prepared by ITS/SEDS Team

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Contents

Introduction

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

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

Audience

This user guide is broken into sections as follows:

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

Features

TIMS has the following features:

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

User Levels and Roles

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

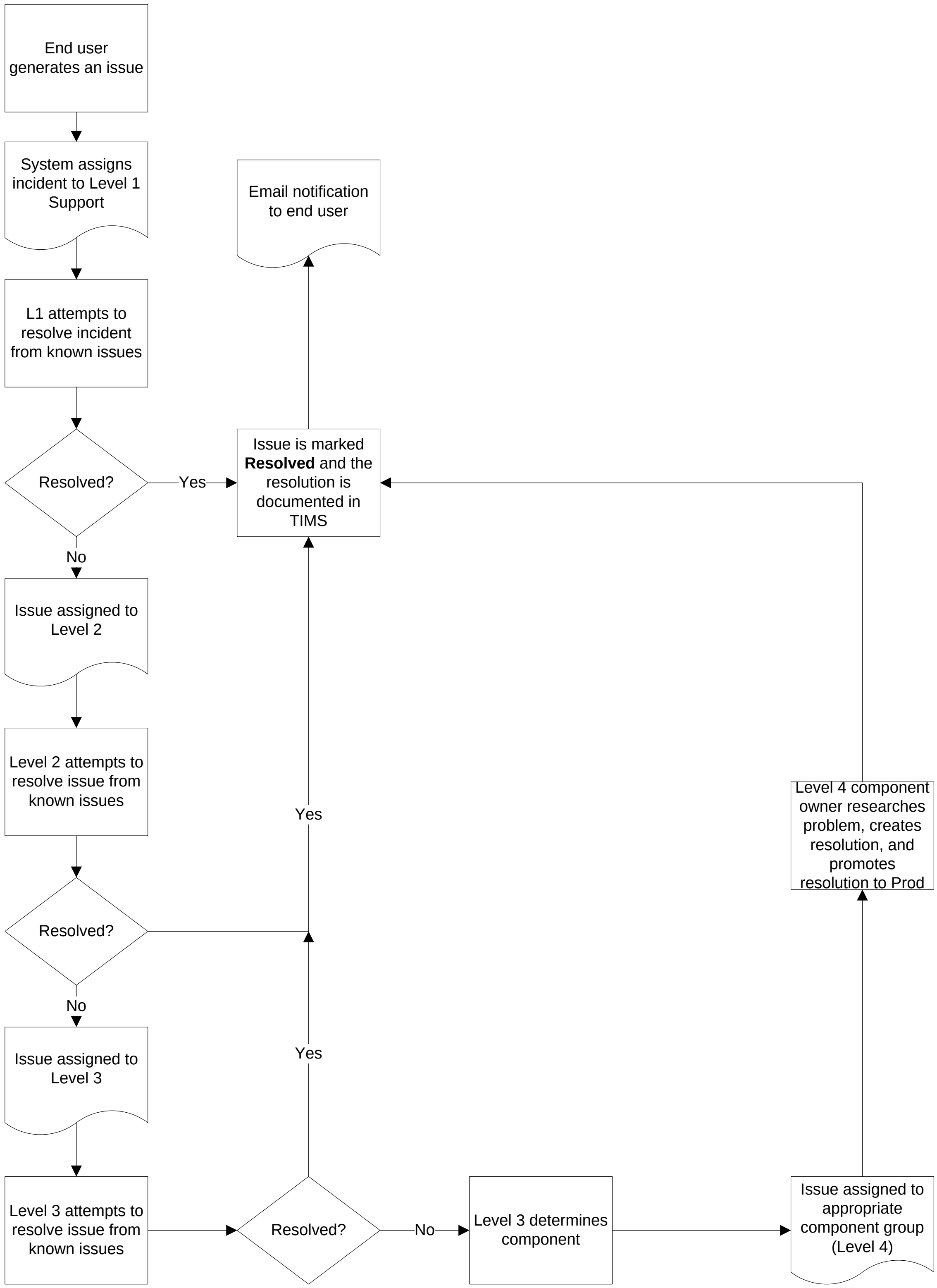
<table>
<tr><th>Level</th><th>TEAL Role/Description</th><th>Description/Privileges</th></tr>
<tr><td>TSDS User</td><td>Any user with a role in one or more of the TSDS Portal and applications, for example:
Unique-ID LEA
ODS Data Loader
TSDS studentGPS Dashboards</td><td>Searches Knowledge Base for help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

FERPA and Use of Data in TIMS

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

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

Simplified Workflow for TIMS



Using the Basic Features of TIMS

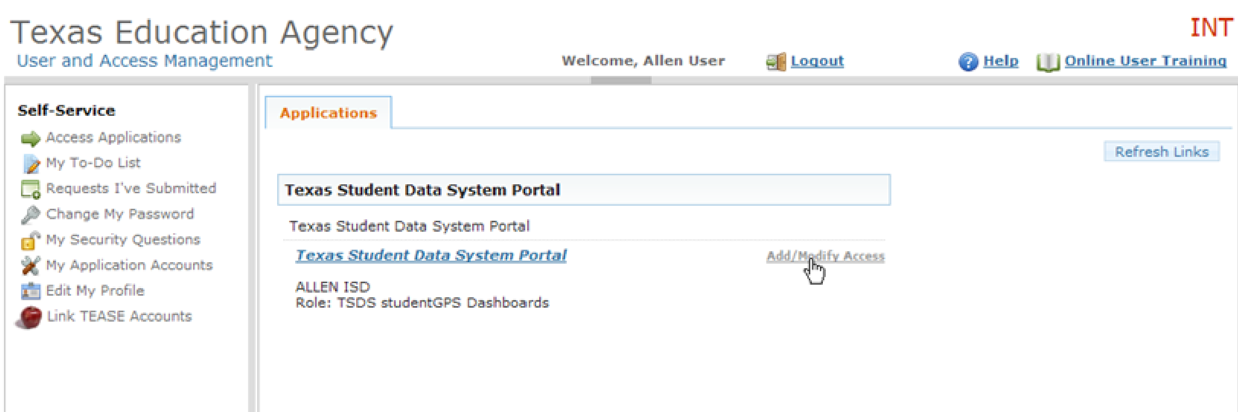
This section of the user guide is designed for end users of TSDS applications so that they can learn the basic features of TIMS:

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

Getting Access to TIMS

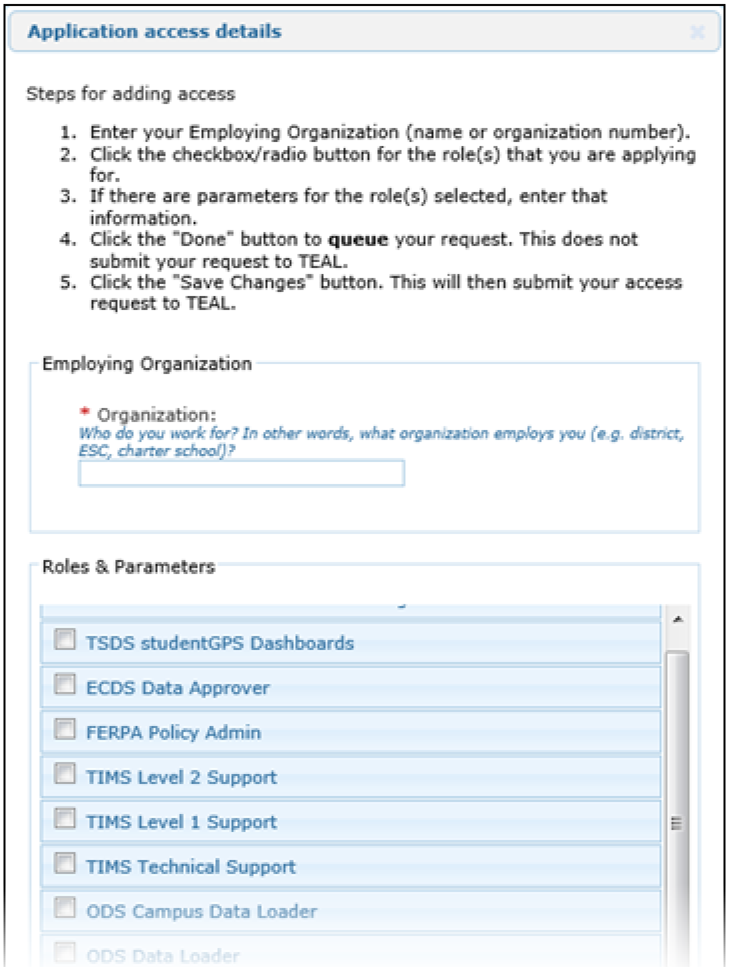
If you are already a TSDS user, you have a TEAL login that gives you access to TIMS. If you need a specific support role (TIMS Level 1 Support, TIMS Level 2 Support, System Support, or TIMS Technical Support) because you are part of the LEA, ESC, certified vendor, or TEA support team, you may request that additional access through TEAL

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



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

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

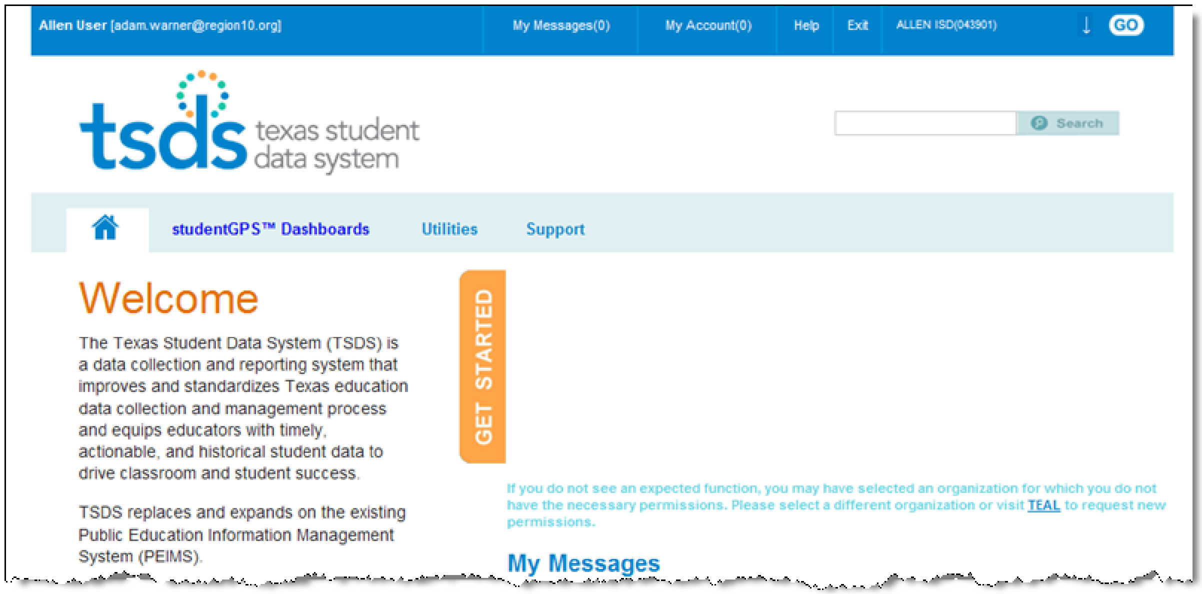


The TIMS support roles are detailed in "User Levels and Roles."

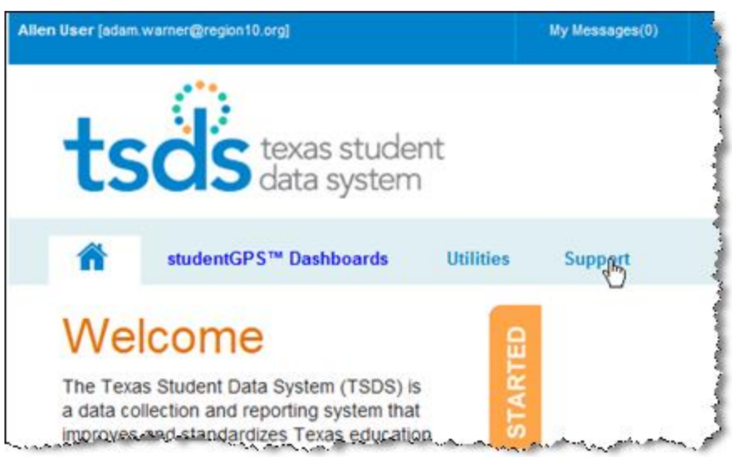
Accessing TIMS

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

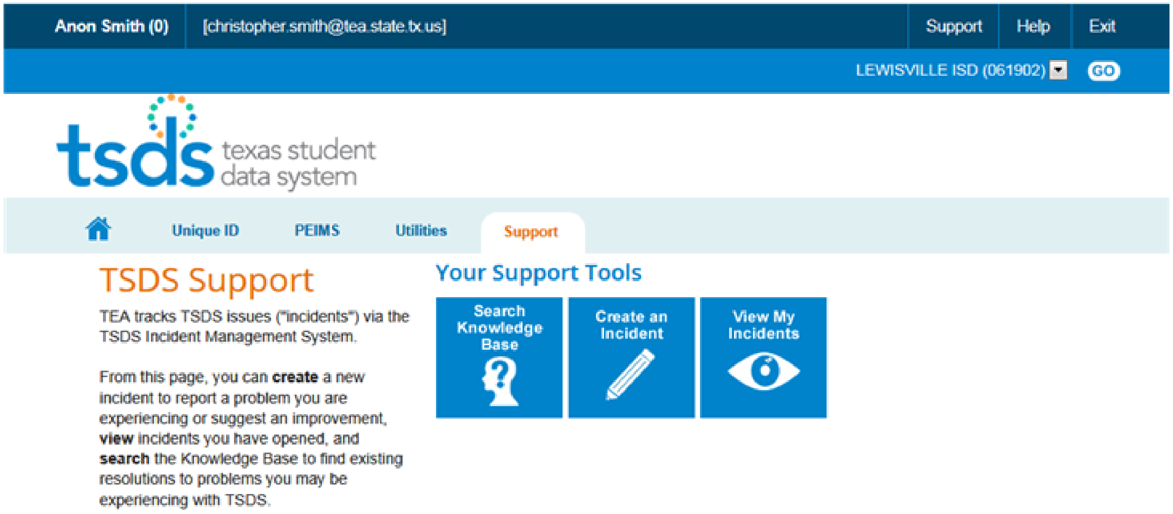
1. Log in TEAL and access the TSDS Portal. This portal may look slightly different from the example below depending upon which TSDS functions you have access to:



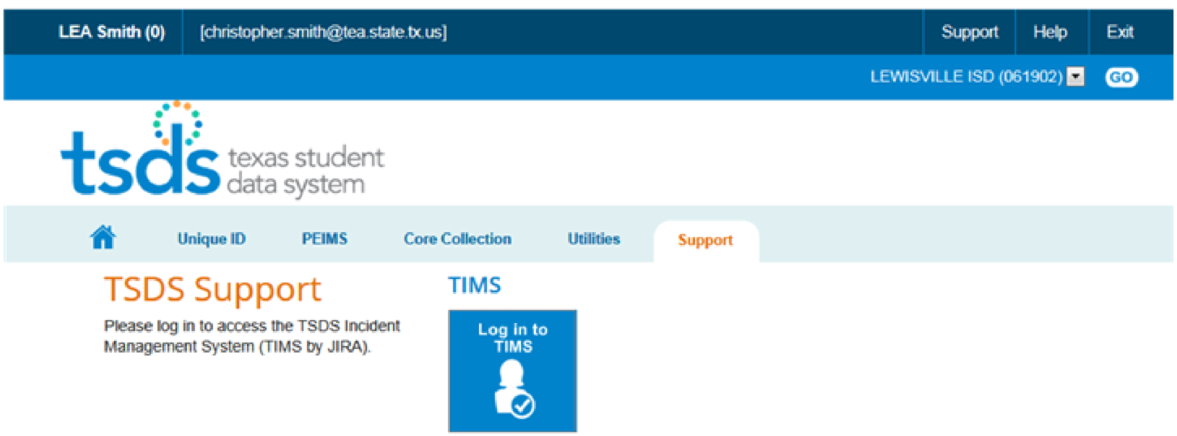
2. Click **Support** on the light blue menu:



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



Users providing support see a page that looks like this:

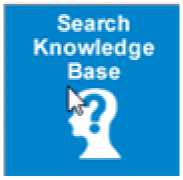


Searching the Knowledge Base

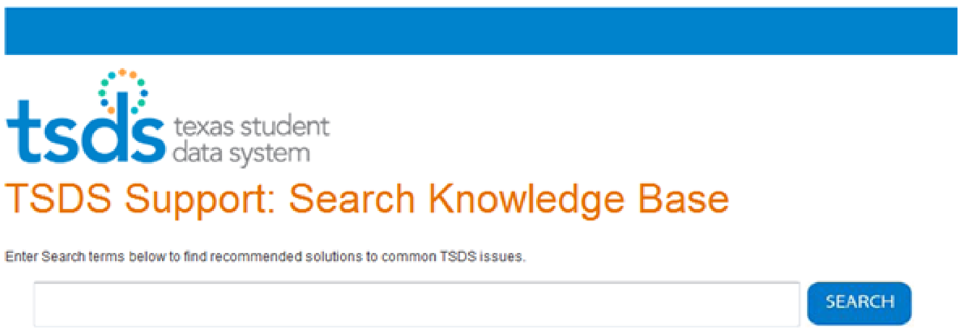
The first activity you should perform when you have difficulty using any TSDS application is to search the Knowledge Base for assistance.

Follow these steps to search the Knowledge Base:

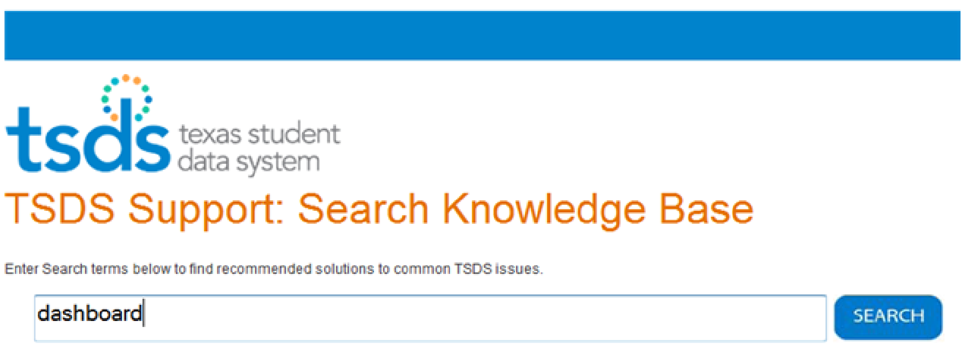
1. Click **Search Knowledge Base:**



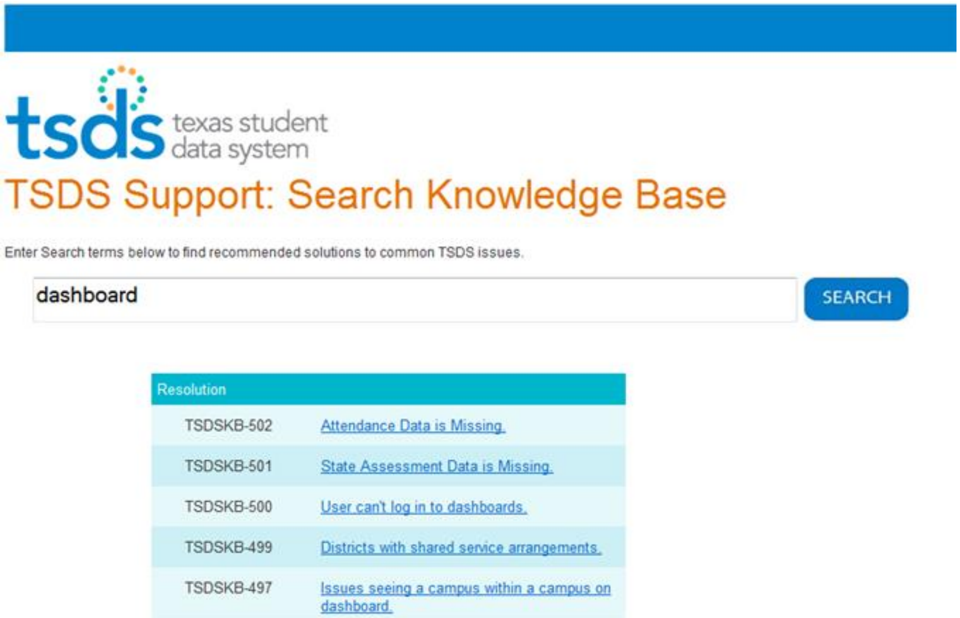
A search field opens allowing you to type your question or a description of your problem:



2. Type your question or some keywords:

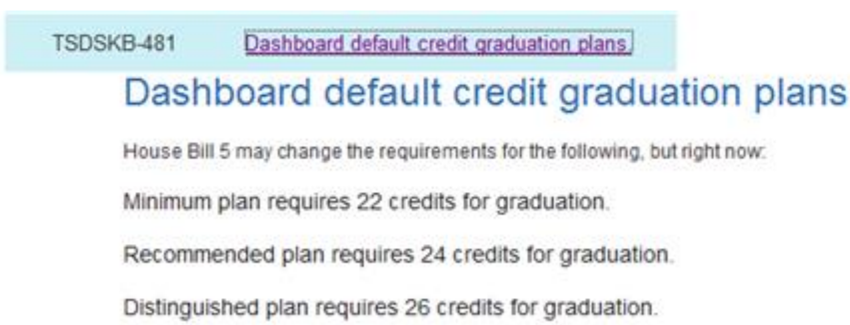


3. Click **Search.**



A list of results appears.

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

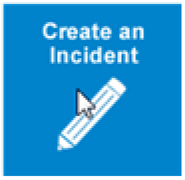


If your search of the Knowledge Base returns no results, try modifying your search criteria. If you are unable to find anything to help you with your problem, submit an incident report.

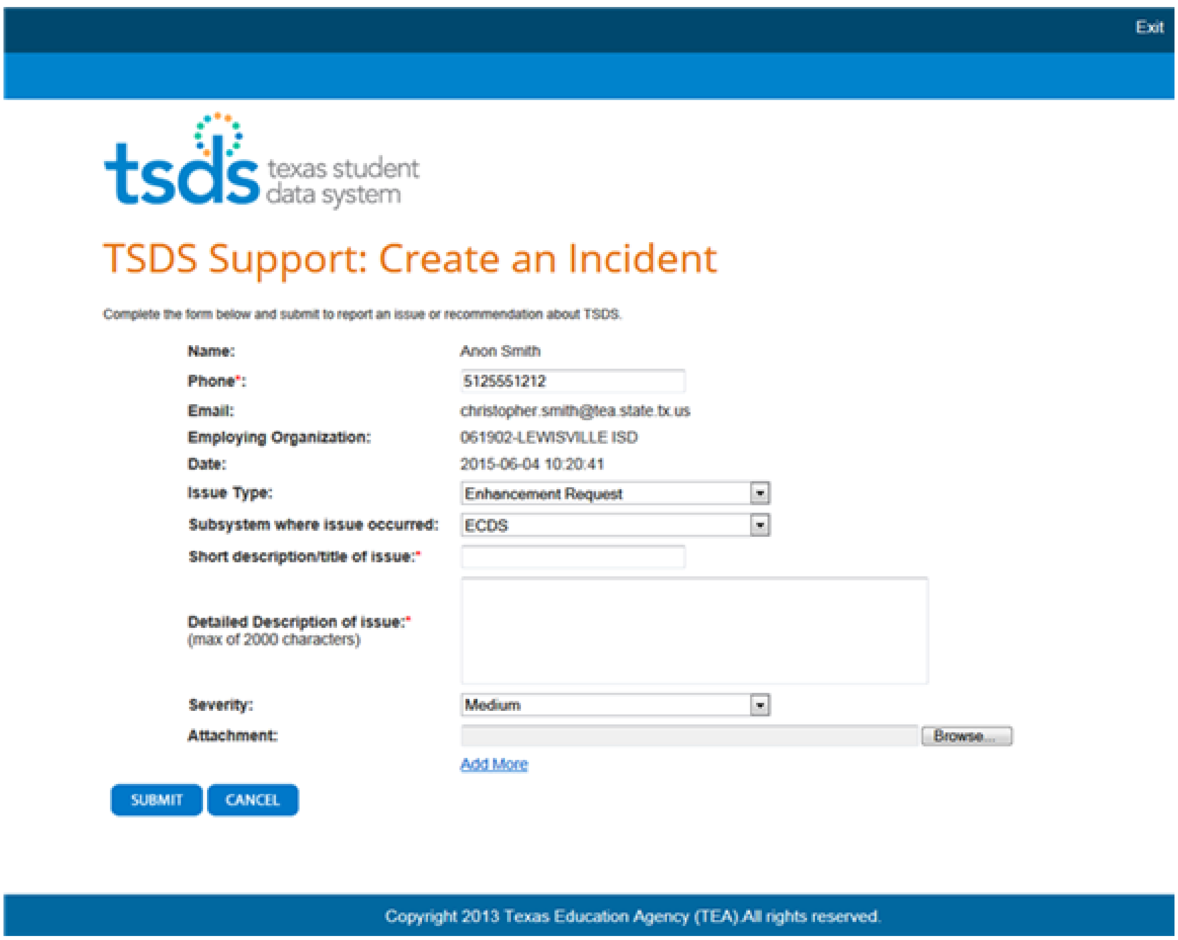
Submitting an Incident Report

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

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



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



2. Type a phone number where you can be reached, including the area code, in the following format: ###-###-####. If your phone number is already entered in TEAL, that information is brought forward to this page, but you can change it if you are currently at another number.

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

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

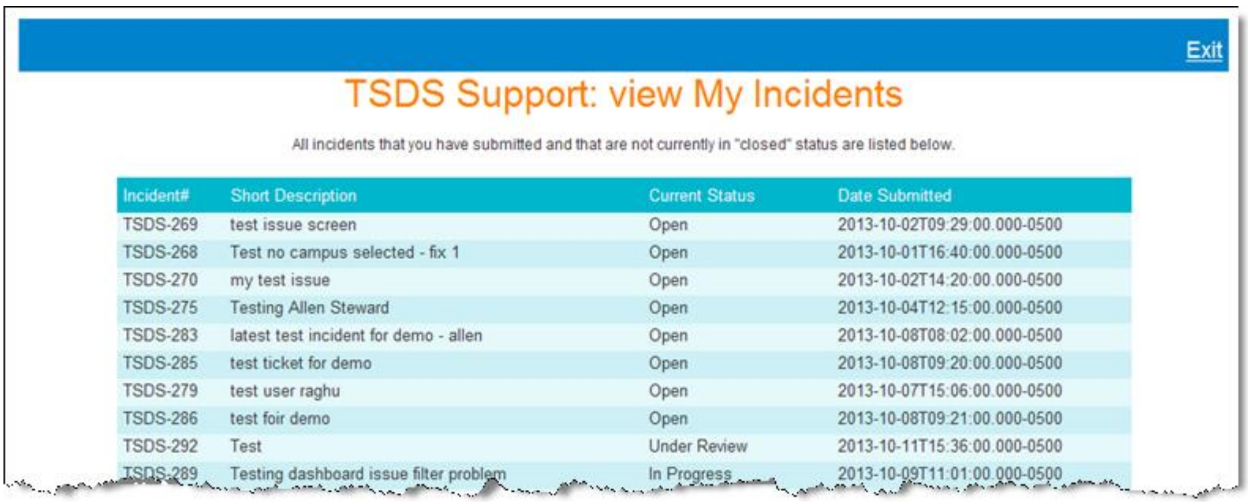
> **Examples:** Here are a couple of examples of well-written detailed descriptions.
>
> Teacher06 does not teach Geometry, World or otherwise. However, the last three classes listed on his drop down menu show that he has three World Geometry classes.
>
> There are 15,634 Course Offering records being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

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

Viewing Your Personal Incident Reports

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

The system lists the incidents you filed:



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

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

Current Status	Description	Level To Set Status	Level Assigned
Open	The incident is open and ready for the assignee to start work on it.		Level 1
In Progress	The incident is being actively worked on by the assignee in Level 1.	Level 1	Level 1
Hold for Customer	More information is needed from the initiator of the problem or the end user before progress can continue.	Level 1	Customer
Level 2 Incoming	The incident has been referred to Level 2 Support	Level 1	Level 2
Level 3 Incoming	The incident has been referred to Level 3 TEA TSDS Support	Level 2	Level 3
Level 4 Incoming	The incident has been referred to Level 4 TSDS Component Owner	Level 3	Level 4

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

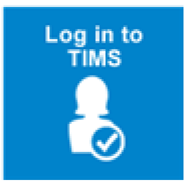
Managing Incidents in Support Views

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

Accessing TIMS

Access TIMS by logging into TSDS through TEAL.

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

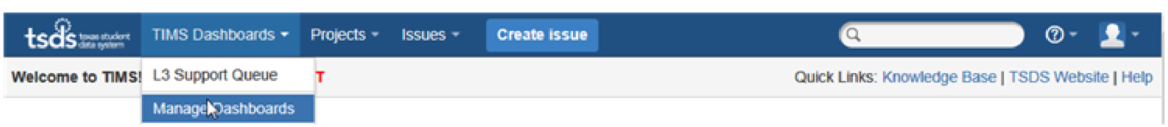


The TIMS Dashboard appears. It needs some setup before you can continue. Pre-formatted dashboards are available for every view, but you must select them.

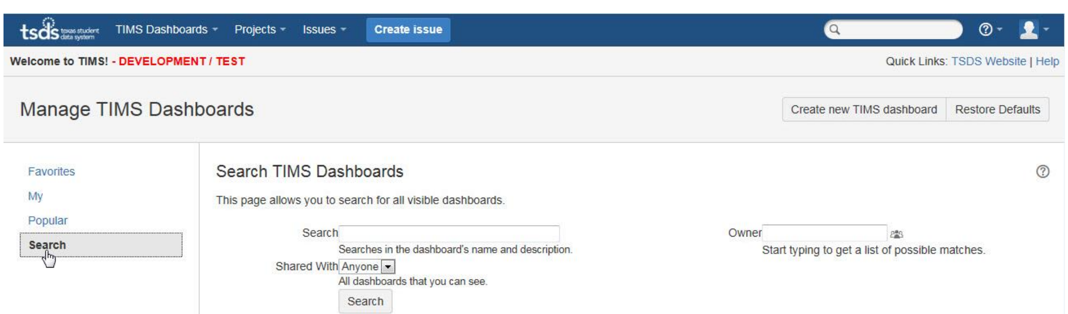
Performing an Initial Setup

TIMS dashboards are customized to show specific views of TSDS incidents. Pre-designed dashboards are available for users at each level of support. Each level of dashboard displays incoming tickets for that support level in the upper right Support Queue. You can set up the dashboard appropriate for your support level as follows:

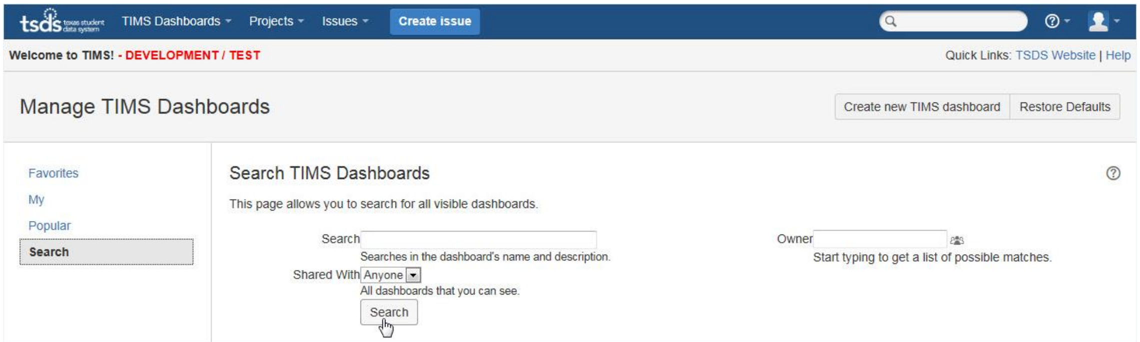
1. From the Dashboards menu, select **Manage Dashboards:**



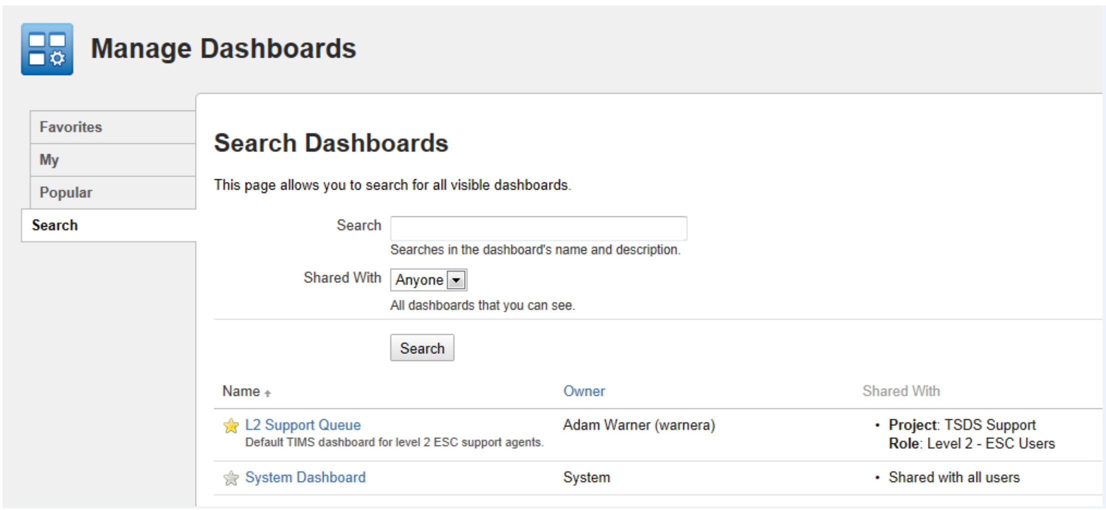
2. Click **Search** on the left pane of the page:



3. To view all dashboard, leave the Search field blank and click the **Search** button.

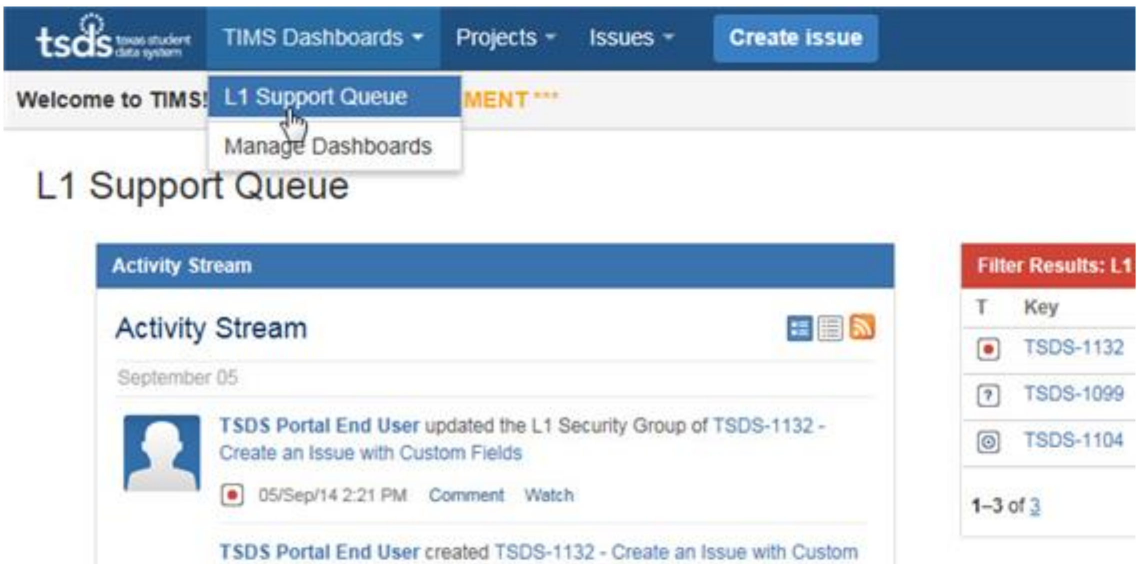


4. From the list of dashboards at the bottom of the page, select the one that corresponds to your support role. (Level 2 Support selects L2 Support Queue, and so on.)

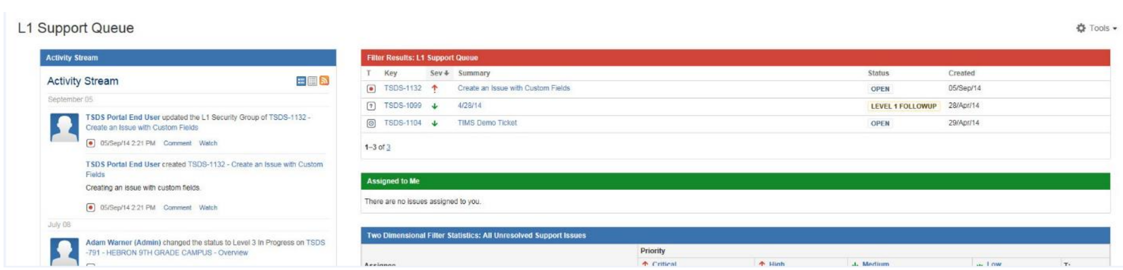


5. The dashboard appears, but you must set it as a favorite to select it permanently. In the message at the top of the page, click **add it as a favorite.**

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



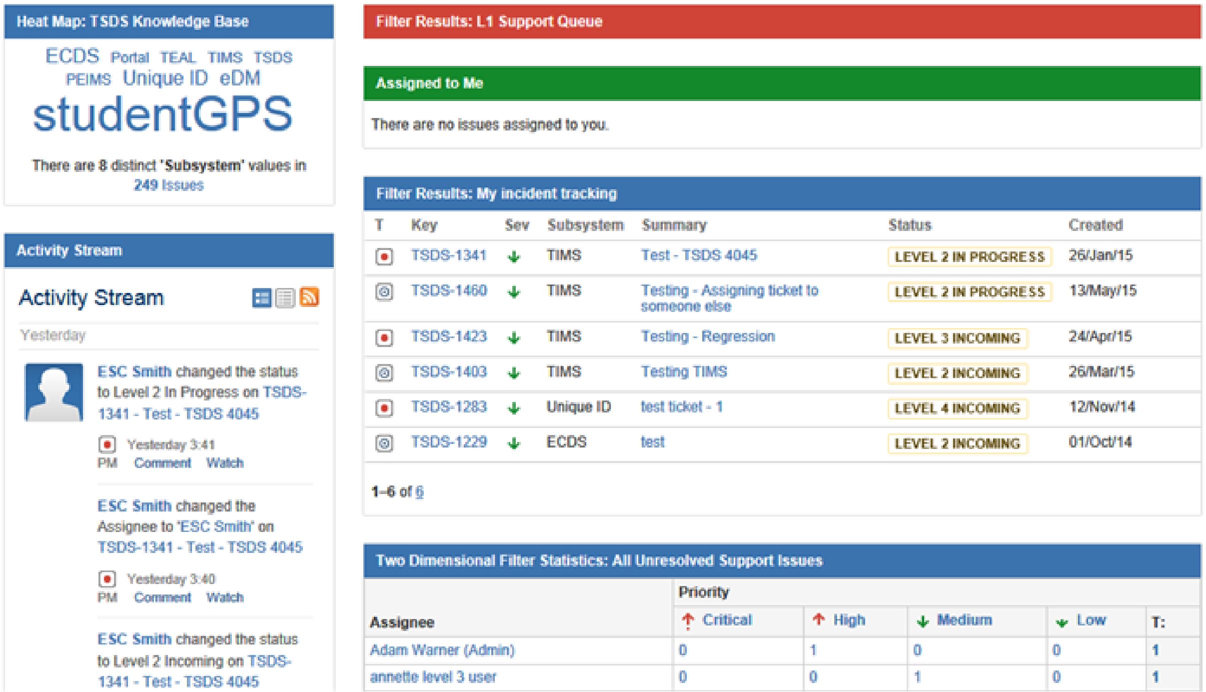
Once you select it, it loads with all the queues and activity stream and other gadgets.



Your setup is complete.

Reviewing the Dashboard

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



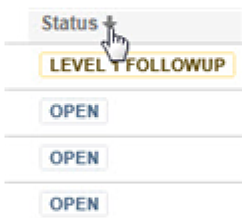
The components, or panes, of the support views are the following:

- **Heat Map:** a way to search Knowledge Base articles. The eight subsystems with the most Knowledge Base articles are listed in the pane, their size indicating the relative number of articles. Click on the name of a subsystem to see the list of articles for that subsystem.
- **Activity Stream:** a summary of recent activity
- **Support Queue:** the unassigned incidents for the specific level of support.
- **Assigned To Me:** a list of incidents assigned to the current user
- **My Incident Tracking:** the list of incidents that you have commented on, moved back to the previous level, or escalated to the next level.
- **All Unresolved Support Issues:** all the unresolved incidents for that specific level of support
- **All Support Issues:** all incidents for the specific level of support

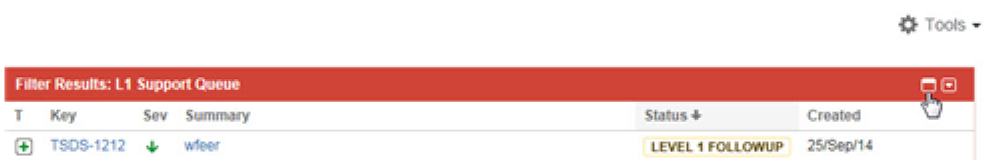
Adjusting the Dashboard

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

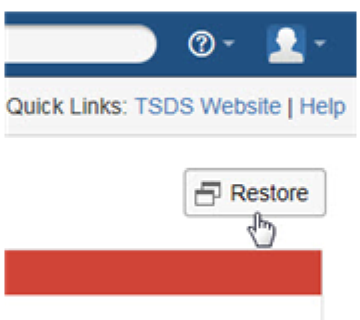
- Click on a column header to sort the view by that column:



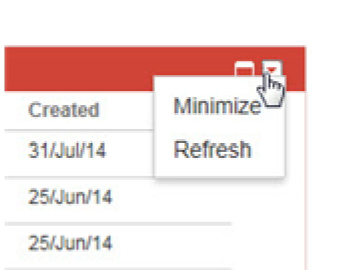
- Click the Maximize icon to open the table to full screen:



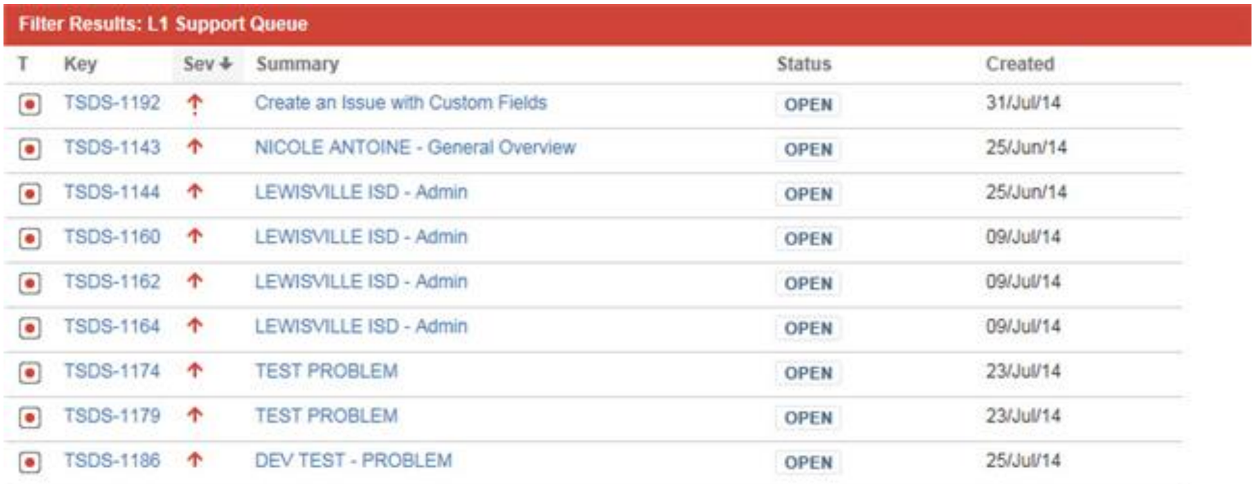
- Click **Restore** to return the table to its panel size.



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



Understanding the Support Queue and Assigned to Me



Filter Results: L1 Support Queue

T	Key	Sev	Summary	Status	Created
	TSDS-1192	↑	Create an Issue with Custom Fields	OPEN	31/Jul/14
	TSDS-1143	↑	NICOLE ANTOINE - General Overview	OPEN	25/Jun/14
	TSDS-1144	↑	LEWISVILLE ISD - Admin	OPEN	25/Jun/14
	TSDS-1160	↑	LEWISVILLE ISD - Admin	OPEN	09/Jul/14
	TSDS-1162	↑	LEWISVILLE ISD - Admin	OPEN	09/Jul/14
	TSDS-1164	↑	LEWISVILLE ISD - Admin	OPEN	09/Jul/14
	TSDS-1174	↑	TEST PROBLEM	OPEN	23/Jul/14
	TSDS-1179	↑	TEST PROBLEM	OPEN	23/Jul/14
	TSDS-1186	↑	DEV TEST - PROBLEM	OPEN	25/Jul/14

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

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

Icon	Type
	Question
	Problem
	Enhancement Request
	User Request

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

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

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

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

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

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

Understanding the Support Issues Tables

The two Support Issues tables show you the number of incidents in various categories. These are basically static displays, but you can click on any link to show the information filtered by what you selected.

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

Two Dimensional Filter Statistics: All Unresolved Support Issues

	Priority				
Assignee	Critical	High	Medium	Low	T:
ESCLEA Support	1	0	0	0	1
ESC Momin	1	0	2	0	3
ESC Rissas	0	0	1	0	1
ESCtest dwright	0	0	1	0	1
Four Rissas	1	0	0	0	1
LEA Momin	0	0	0	1	1
LEA Rissas	0	1	2	1	4
LEAtest dwright	0	0	1	0	1
TEA LevelFour	1	0	0	0	1
TEA LevelThree	0	0	1	0	1
TEA LevelThree	0	0	1	0	1
Tea Sme	1	0	0	0	1
Tea Support	0	0	1	0	1
Technical Coach	0	0	2	0	2
Test Component Owner User	0	0	1	1	2
Three Rissas	0	1	1	0	2
Unassigned	3	11	50	11	75
Total Unique Issues:	8	13	64	14	99

Showing **17** of **17** statistics.
Filter: All Unresolved Support Issues

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

Two Dimensional Filter Statistics: All Support Issues

	Subsystem												
Status	ECDS	Portal	TEAL	TEDS	TIMS	TSDS PEIMS	TSDS Website	Training/Deployment	Unique ID	eDM	studentGPS	None	T:
OPEN	0	0	0	0	0	3	0	0	0	0	0	0	3
RESOLVED	0	0	0	0	0	1	0	0	0	0	0	0	1
CLOSED	1397	69	297	50	251	3295	52	48	8408	1270	1088	48	16273
HOLD FOR CUSTOMER	0	0	0	0	0	1	0	0	0	0	0	0	1
LEVEL 2 INCOMING	0	0	0	0	0	5	0	0	6	1	1	0	13
LEVEL 3 INCOMING	0	0	0	0	0	1	0	0	0	1	0	0	2
LEVEL 2 FOLLOWUP	0	0	1	1	1	5	0	0	5	2	3	0	18
LEVEL 3 FOLLOWUP	0	1	0	0	0	4	0	1	0	0	0	0	6
LEVEL 4 IN PROGRESS	0	0	0	0	0	9	0	0	0	0	0	0	9
LEVEL 3 IN PROGRESS	0	0	0	0	0	6	0	0	0	0	0	0	6
LEVEL 2 IN PROGRESS	0	0	0	1	1	1	0	0	1	0	0	0	4
LEVEL 2 HOLD	0	0	0	1	0	5	0	0	1	0	0	0	7
LEVEL 3 HOLD	1	1	0	4	12	32	2	0	6	11	9	0	78
LEVEL 4 HOLD	0	0	0	0	0	16	0	0	1	1	0	0	18
LEVEL 1 FOLLOWUP	0	0	2	0	0	16	0	1	8	4	3	0	34
LEVEL 3 ARTF IN REVIEW	0	0	0	0	0	1	0	0	0	0	0	0	1
Total Unique Issues:	1398	71	300	57	265	3401	54	50	8436	1290	1104	48	16474

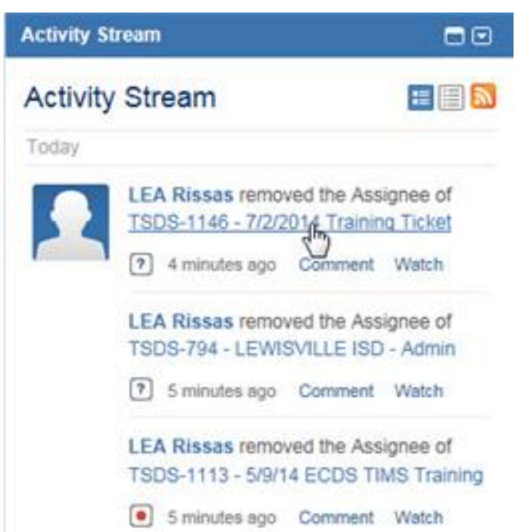
Showing **16** of **16** statistics.
Filter: All Support Issues

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

Viewing the Detail of an Incident

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

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



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

Assigned to Me

T	Key	Sev	Summary	Status	Created
	TSDS-1166	↑	LEWISVILLE ISD - Admin	IN PROGRESS	09/Jul/14
	TSDS-780	↓	can i attach a file	IN PROGRESS	19/Dec/13
	TSDS-1124	↓	test	HOLD FOR CUSTOMER	20/May/14
	TSDS-1202	↓	Test - No grades on reports	HOLD FOR CUSTOMER	25/Sep/14

1–4 of 4

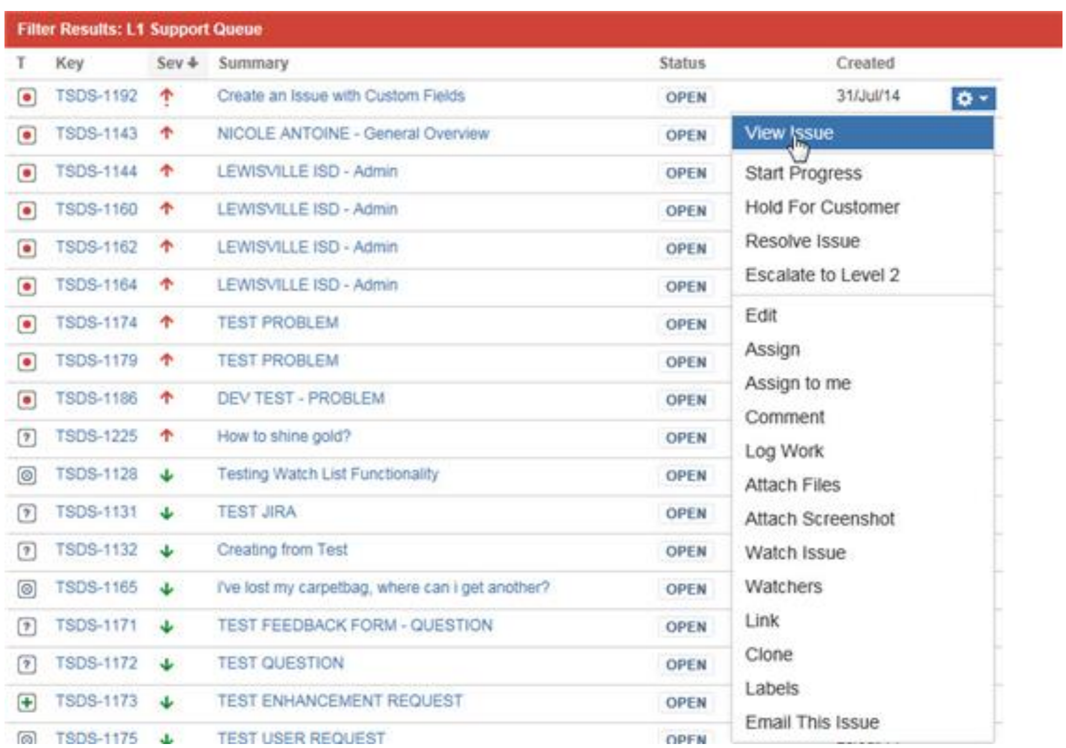
- By accessing the menu from one of the queues:

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

Filter Results: L1 Support Queue

T	Key	Sev	Summary	Status	Created
	TSDS-1192	↑	Create an Issue with Custom Fields	OPEN	31/Jul/14
	TSDS-1143	↑	NICOLE ANTOINE - General Overview	OPEN	25/Jun/14
	TSDS-1144	↑	LEWISVILLE ISD - Admin	OPEN	25/Jun/14
	TSDS-1160	↑	LEWISVILLE ISD - Admin	OPEN	09/Jul/14

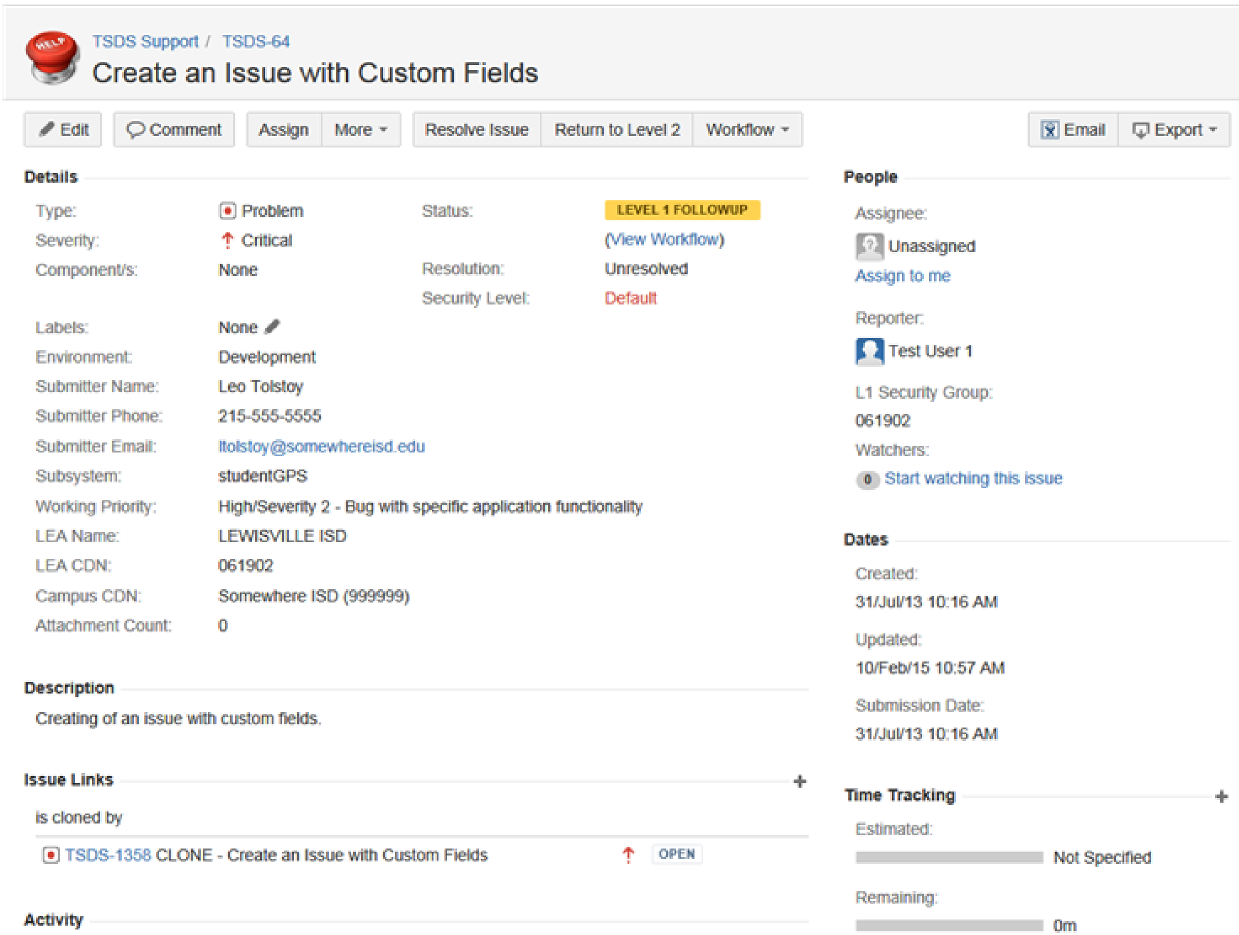
Select **View Issue** from the menu. The options listed on this menu are different depending upon the level of support and the status.



Filter Results: L1 Support Queue

T	Key	Sev	Summary	Status	Created
	TSDS-1192	↑	Create an Issue with Custom Fields	OPEN	31/Jul/14
	TSDS-1143	↑	NICOLE ANTOINE - General Overview	OPEN	
	TSDS-1144	↑	LEWISVILLE ISD - Admin	OPEN	
	TSDS-1160	↑	LEWISVILLE ISD - Admin	OPEN	
	TSDS-1162	↑	LEWISVILLE ISD - Admin	OPEN	
	TSDS-1164	↑	LEWISVILLE ISD - Admin	OPEN	
	TSDS-1174	↑	TEST PROBLEM	OPEN	
	TSDS-1179	↑	TEST PROBLEM	OPEN	
	TSDS-1186	↑	DEV TEST - PROBLEM	OPEN	
	TSDS-1225	↑	How to shine gold?	OPEN	
	TSDS-1128	↓	Testing Watch List Functionality	OPEN	
	TSDS-1131	↓	TEST JIRA	OPEN	
	TSDS-1132	↓	Creating from Test	OPEN	
	TSDS-1165	↓	i've lost my carpetbag, where can i get another?	OPEN	
	TSDS-1171	↓	TEST FEEDBACK FORM - QUESTION	OPEN	
	TSDS-1172	↓	TEST QUESTION	OPEN	
	TSDS-1173	↓	TEST ENHANCEMENT REQUEST	OPEN	
	TSDS-1175	↓	TEST USER REQUEST	OPEN	

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



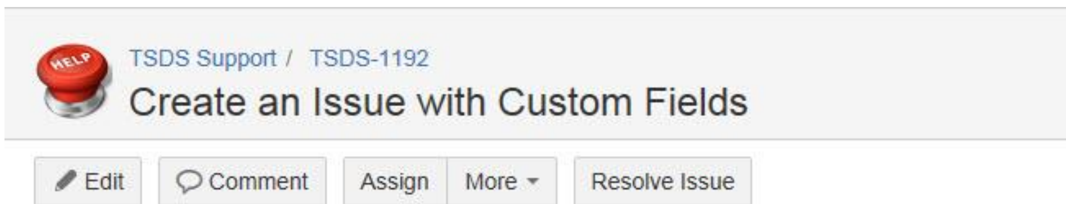
From here, you can see a great deal more information about the problem. You can also edit it, assign it, resolve it, return it, view the workflow, and attach documents. Instructions for doing so are contained in the sections following.

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

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

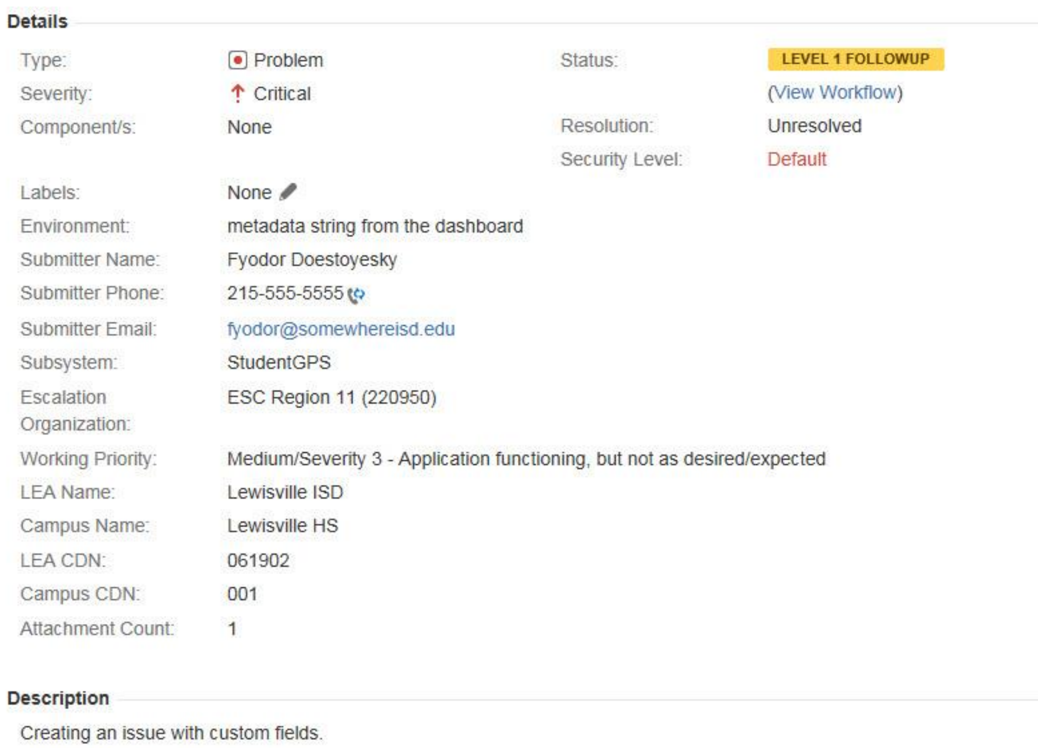
Top-Row Buttons

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



Details

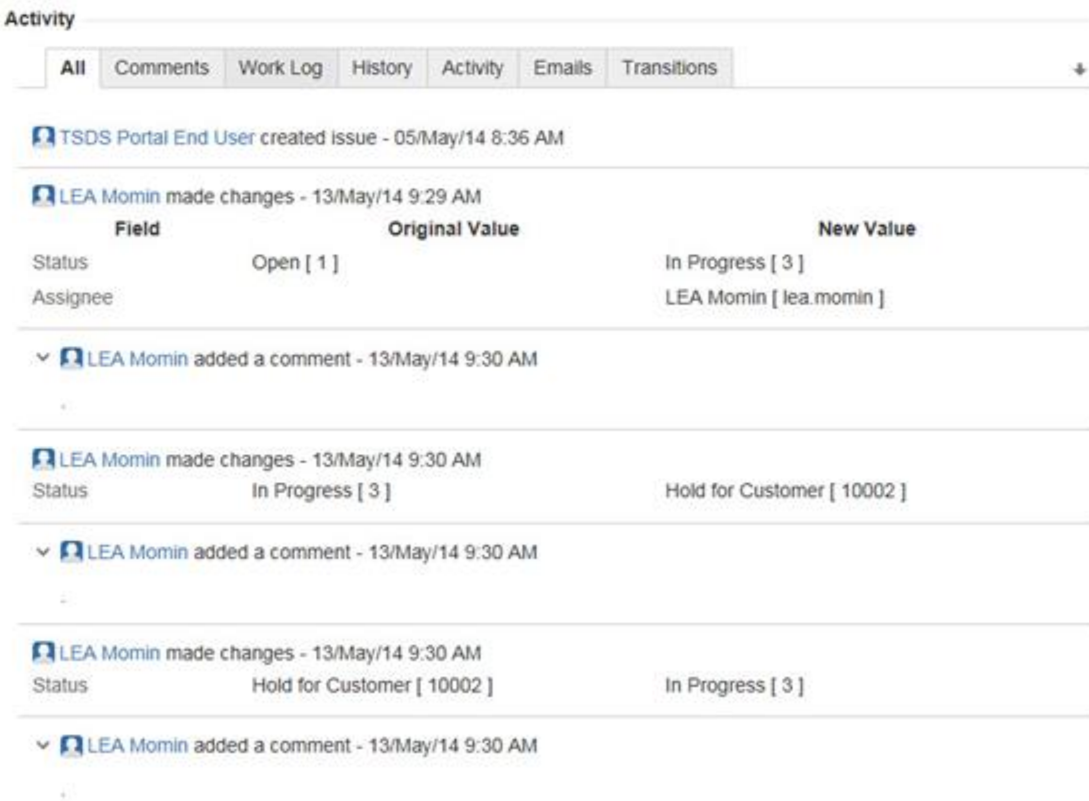
The details of the incident appear in the Details pane. This is the same information entered by the submitter of the incident.



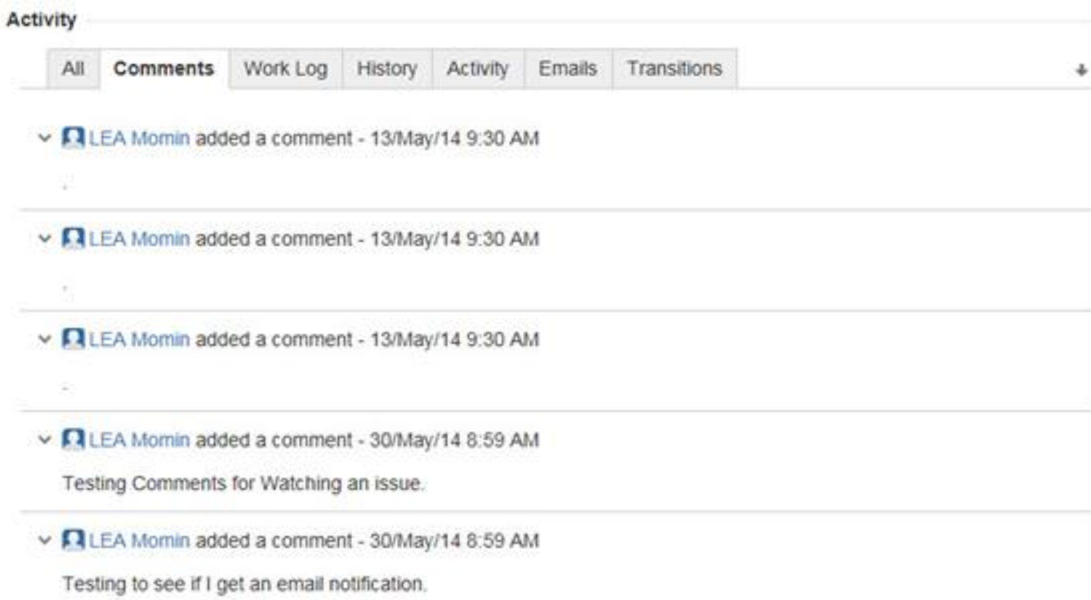
Activity

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

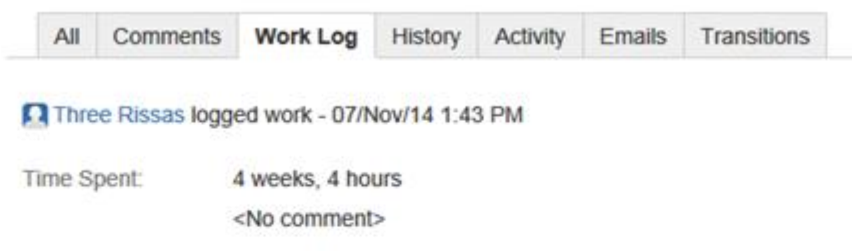
- **All:** provides a log of all the activity that has taken place.



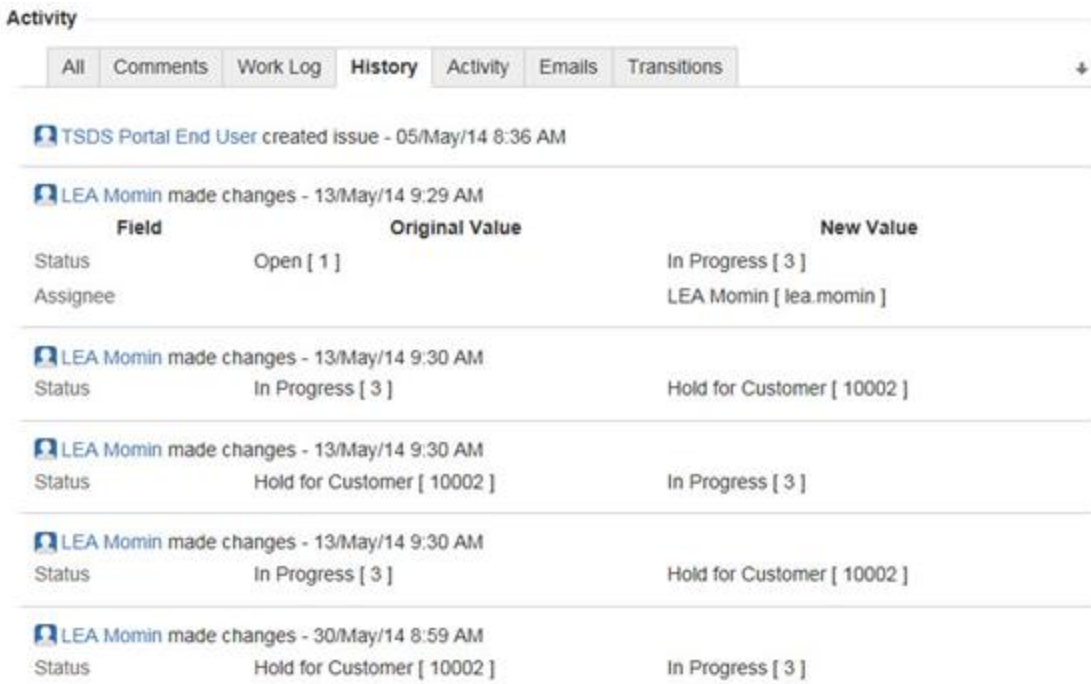
- **Comments:** shows all the comments made through the lifecycle of an incident.



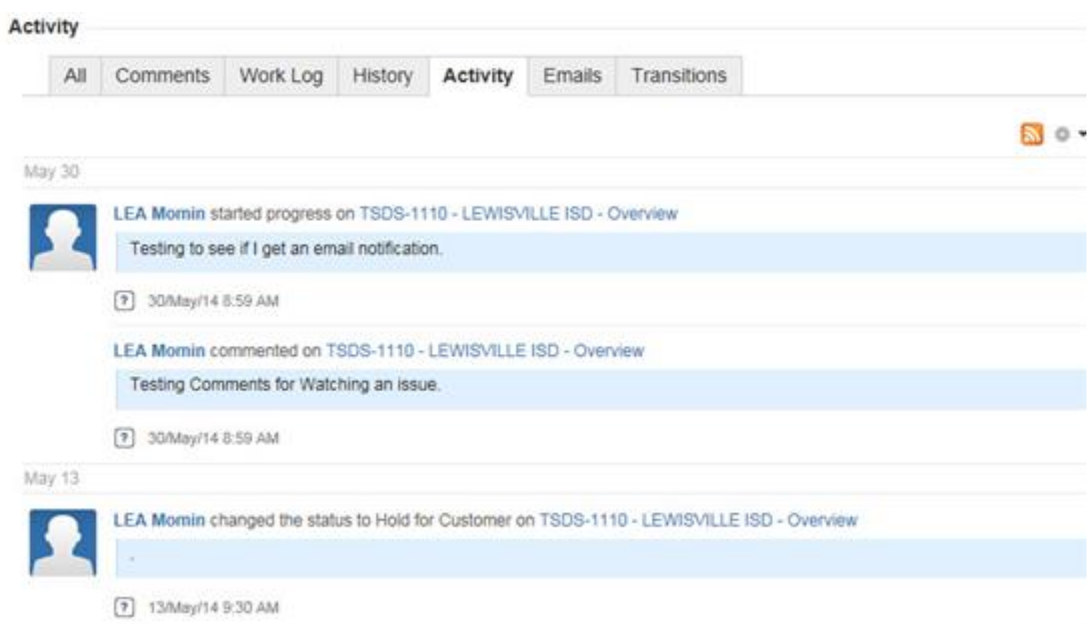
- **Work Log:** shows each work log entry and allows you to edit it.



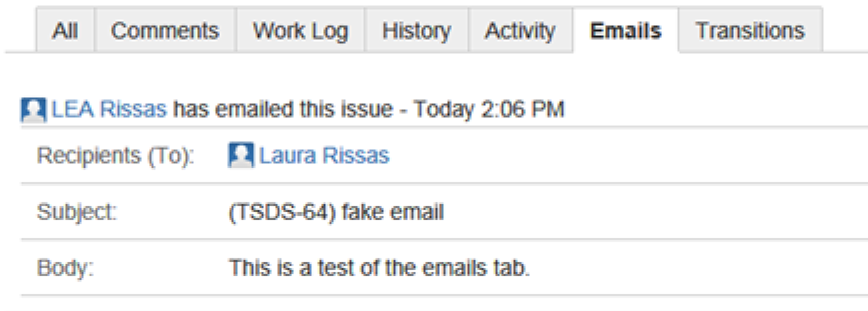
- **History:** shows the history of changes for the incident, showing the name of the thing that changed (a field, a status, a description), the original value, and the new value.



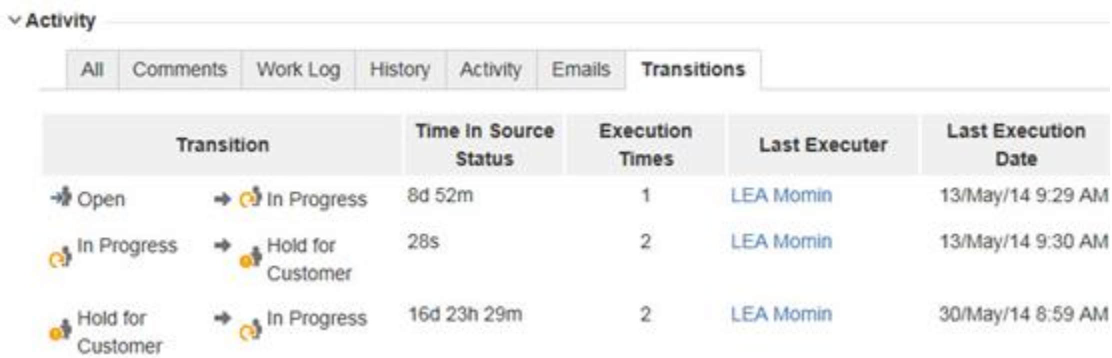
- **Activity:** records all activity involving an incident.



- **Emails:** shows any emails for the issue.

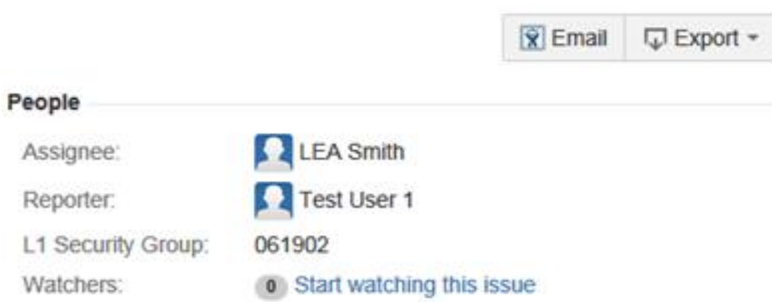


- **Transitions:** shows information about each change in status and level:



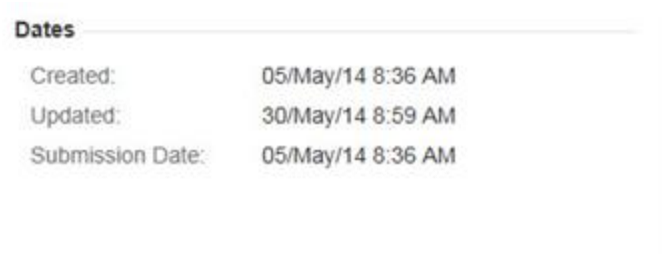
People

The **People** pane shows who reported or who has been working on an incident. You can also start or stop watching the issue from this pane:



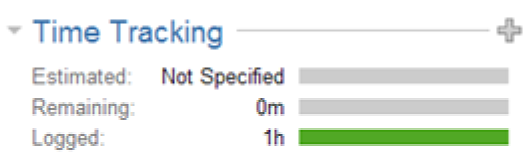
Dates

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



Time Tracking

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



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

Printing the Detail of an Incident

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

Returning to the Dashboards from the Detail View

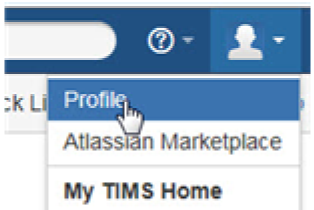
To return to the dashboards from the detail view, click **TIMS Dashboards** and your queue level at the top left of the page:

Subscribing to Incident Updates

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

Check email Type

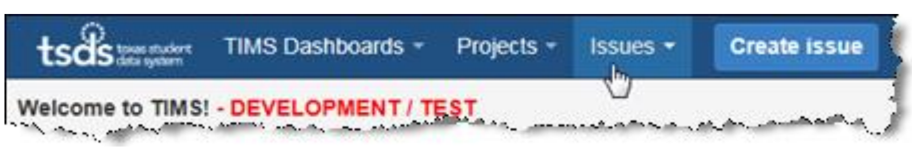
1. First, you must confirm that your email type is set to HTML. Click the arrow next to your name at the top right of the page and select **Profile:**



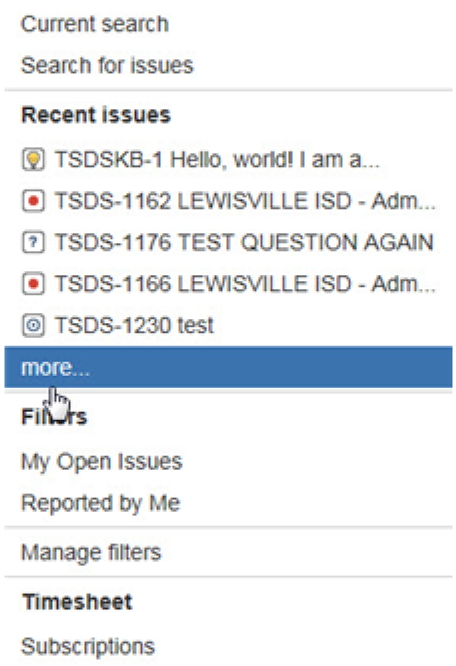
2. Under **Preferences**, check that the **Email Type** is set to **HTML.**

Setting Up a Filter

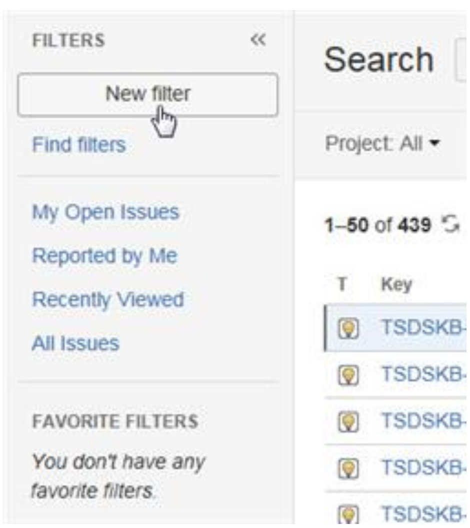
1. Click the word **Issues** in the top menu:



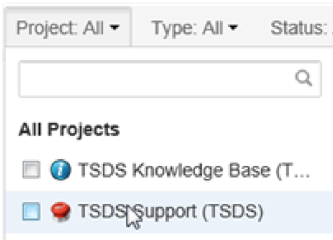
2. Click **more** under **Recent Issues:**



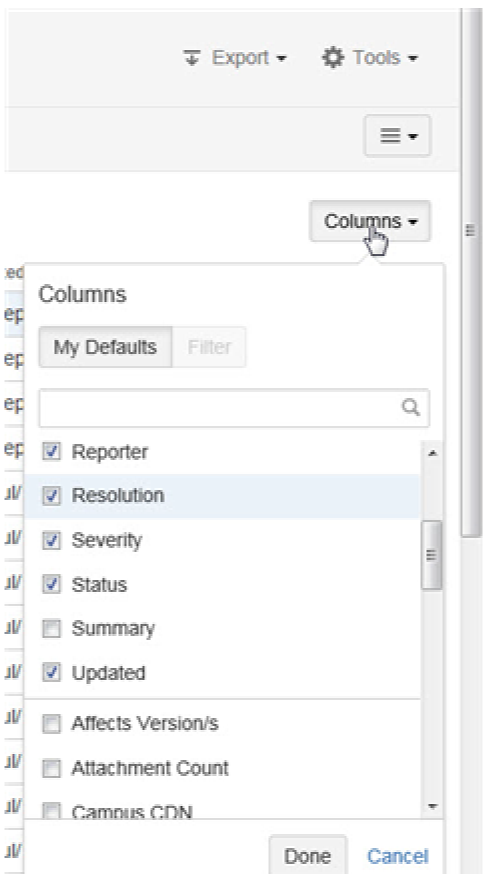
3. Click the double arrow on the far left to show the Filters pane.
4. Click **New filter:**



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



4. For **Type,** choose the applicable issue type.
5. For Status, click one or more statuses.
6. For **Assignee,** click the applicable assignee.
7. If you want to include more criteria, select **Columns:**

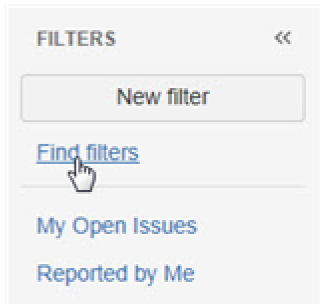


Important: It is very important that you complete this and the following step to limit the view of the data in accordance with FERPA.

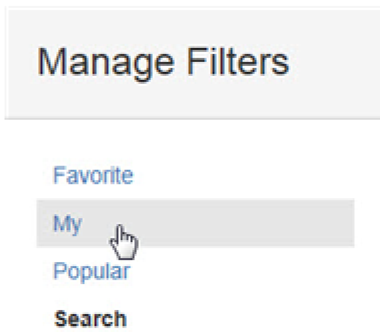
8. Click **Done.**
9. Click **Save as** and give the filter a name.

Subscribe

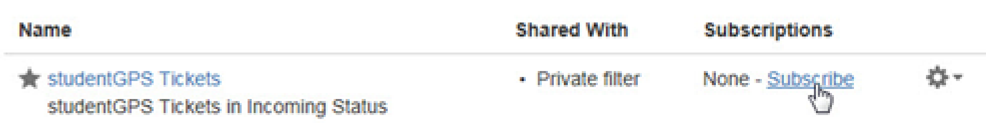
1. Click **Find filters.**



2. Click **My.**



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



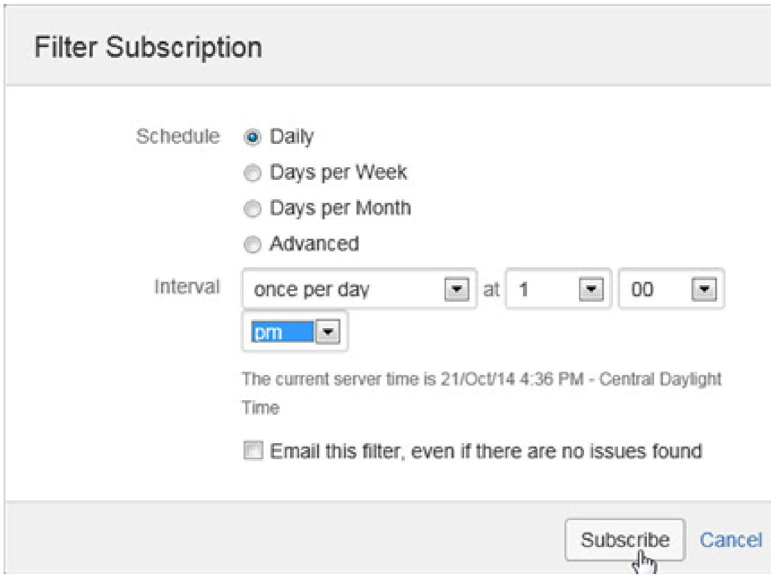
4. Select a schedule for receiving updates. For **Schedule,** choose from the options. The selections under **Interval** change depending upon what you pick for **Schedule.**

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

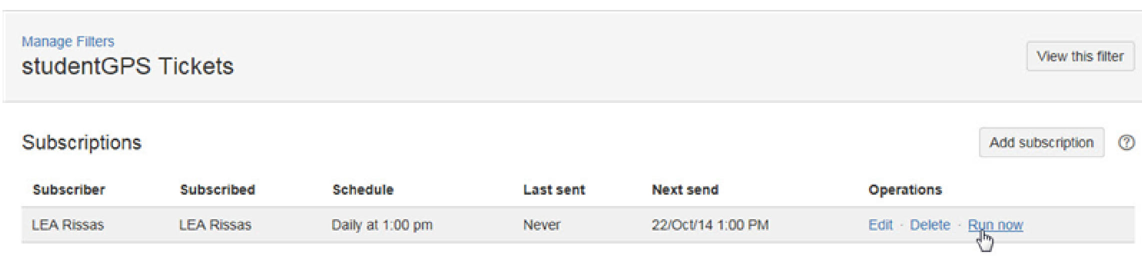
   For **Interval**, select appropriate options. For example, if you picked **Daily,** you might select **Every thirty minutes** and a time range.

5. If you want the updates emailed even if there are no issues, click **Email this filter, even if there are no issues found.**

6. Click **Subscribe.**



7. Back in the view of your filter, click **Run now** to start the subscription:



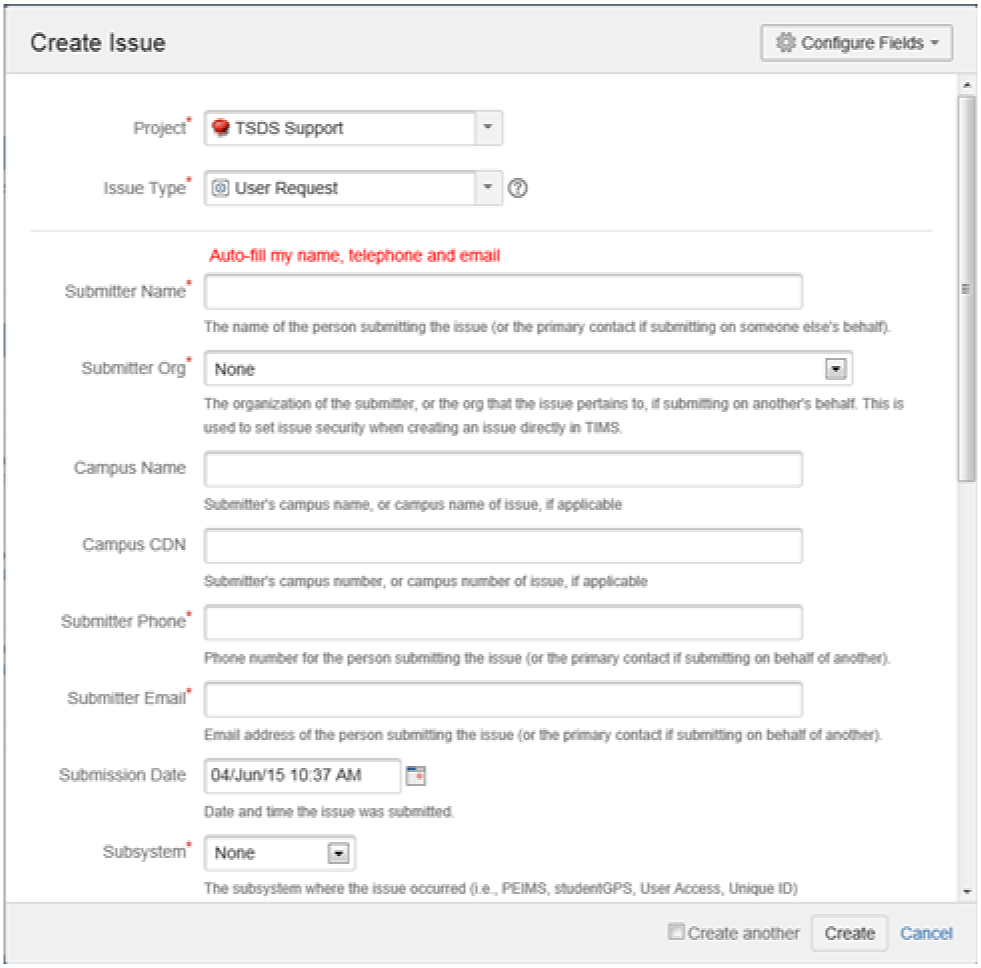
You can use the links under **Operations** to delete the subscription or edit it.

Submitting an Incident

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

1. From the menu at the top of the page, select **Create Issue.**

The incident creation form appears:



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

1. Select the applicable **Project** from the drop-down menu.
2. Select the **Issue Type:**
   - **Problem:** to report a problem that prevents the functioning of the product
   - **Question:** to ask the support team a question
   - **Enhancement Request:** to request an enhancement from support
3. Type the **Submitter Name** or click **Auto-fill my name, telephone and email** if the request is for yourself.
4. For **Submitter Org,** select the submitter's or primary contact's organization from the list.
5. Type the **Campus Name** for the campus that was affected by the incident or where it was observed, if applicable.
6. For **Campus CDN,** type the county-district number of the campus reporting the incident, if applicable.

7. If you did not use the auto-fill in Step 3 or if you do not have a phone number on record, type a phone number for the submitter or primary contact.
8. If you did not use the auto-fill in Step 3 or if you are reachable at a different email address than the one listed, type an email address for the submitter or primary contact.
9. The **Submission Date** is automatically set for the current date and time, but if the date was a different one, click the calendar icon to select a different date. You can click on a date in the current month or use the arrows to find a different month. Click **x** to close the box.
10. Select the **Subsystem** where the incident was observed.
11. Type a **Summary** of the problem.
12. Type a detailed **Description** of the problem. If you encountered a defect, type what you were doing that made the incident occur. The more detail you can provide, the better.

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

13. Select the **Severity** of the incident, as follows:
    - **Low:** the submitter has a question, is asking for an enhancement in functionality, or having problems with the display or formatting of information.
    - **Medium:** the application works but produces incorrect, incomplete, or inconsistent results, or the problem impairs usability.
    - **High:** a problem with specific application functionality is causing a major impact on the submitter’s work.
    - **Critical:** the submitter encountered a system failure.
14. If there is some kind of **Attachment**, a data spreadsheet or screen capture, for example, click **Browse** to find the file and attach it.
15. Type appropriate information about the user’s **Environment**, for example, browser type, software platform, or hardware information.
16. Ignore the last two fields, which will be completed automatically.
17. If you immediately want to create another incident, check **Create another.** Once you click Create, another incident request form will appear.
18. Click **Create.**

Assigning an Incident to Yourself

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

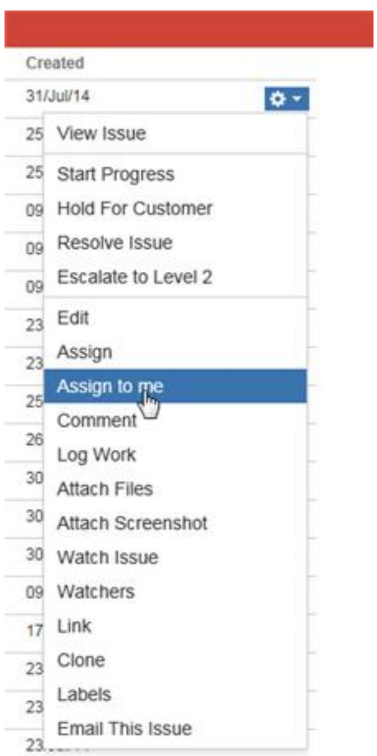
From the Detail View

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

From the Support Queue

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

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



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

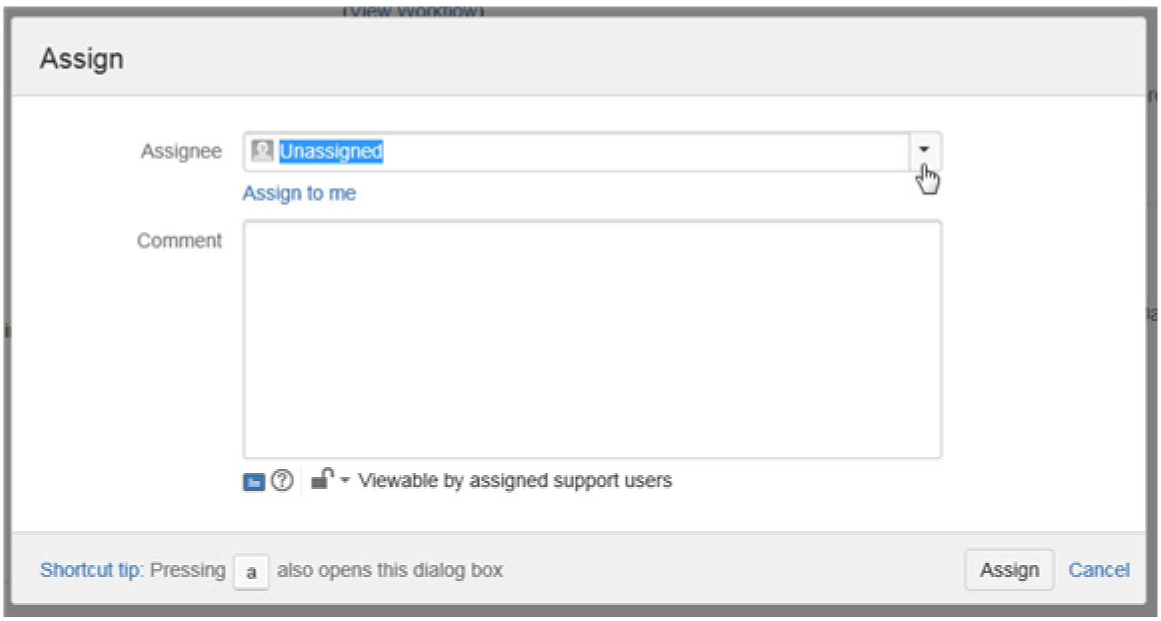
Assigning an Incident to Someone Else

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

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

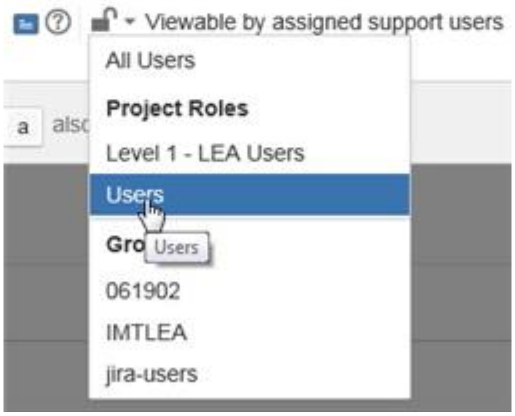
   - If you are already in the detailed view of the incident, click **Assign.**
   - From the queues, hover the mouse on the right side of the incident until the gear and arrow appear, click, and select **Assign** from the menu.

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



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

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

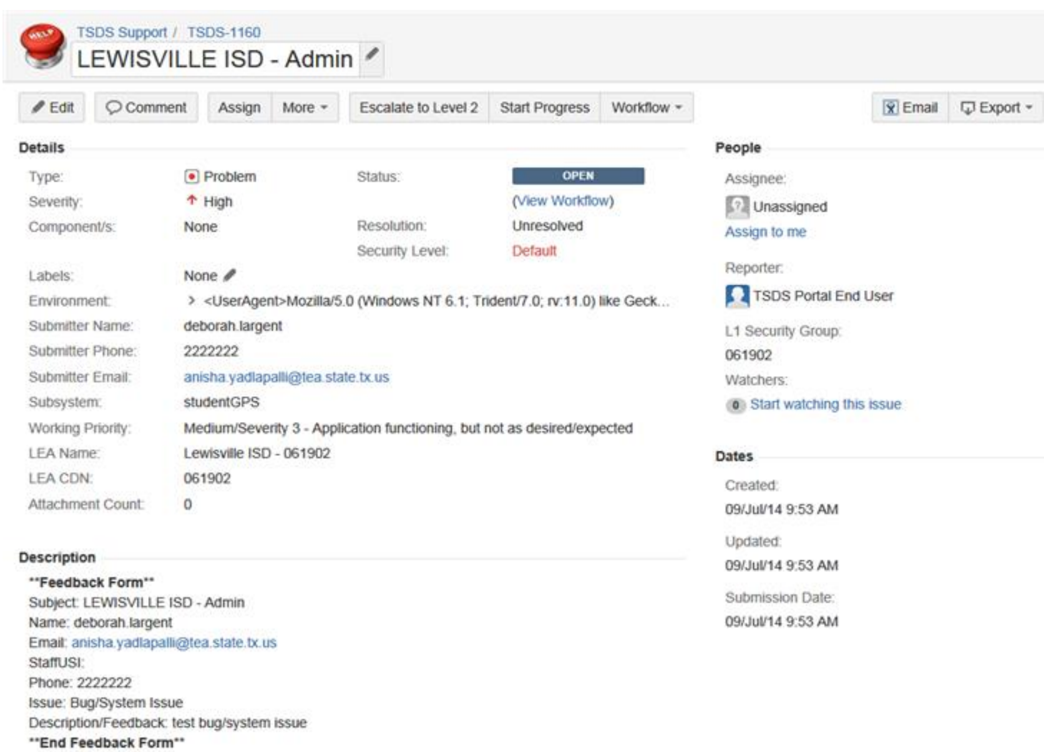


5. Click **Assign.**

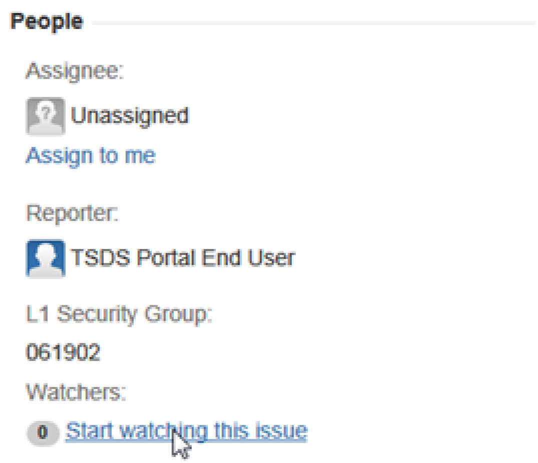
Watching an Incident

There may be reasons why you do not want to assign an incident to yourself but you want to keep track of its progress. You can watch the incident, so that when it changes status you will be notified.

1. Open the incident from the queue. The following example of an incident is from the L1 queue.



2. In the right column of the issue under **People,** click **Start watching the issue**:

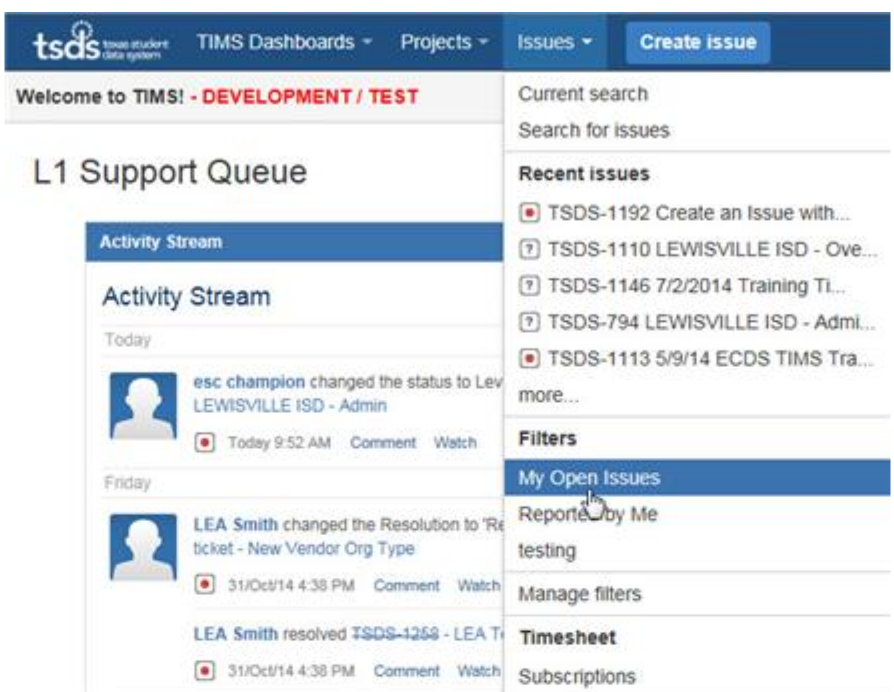


In the example above, there are no users watching the issue, as indicated by the 0 in the shaded area next to the link. Once you sign up to watch the issue, the number increases by 1, and the link changes to say **Stop watching this issue.**

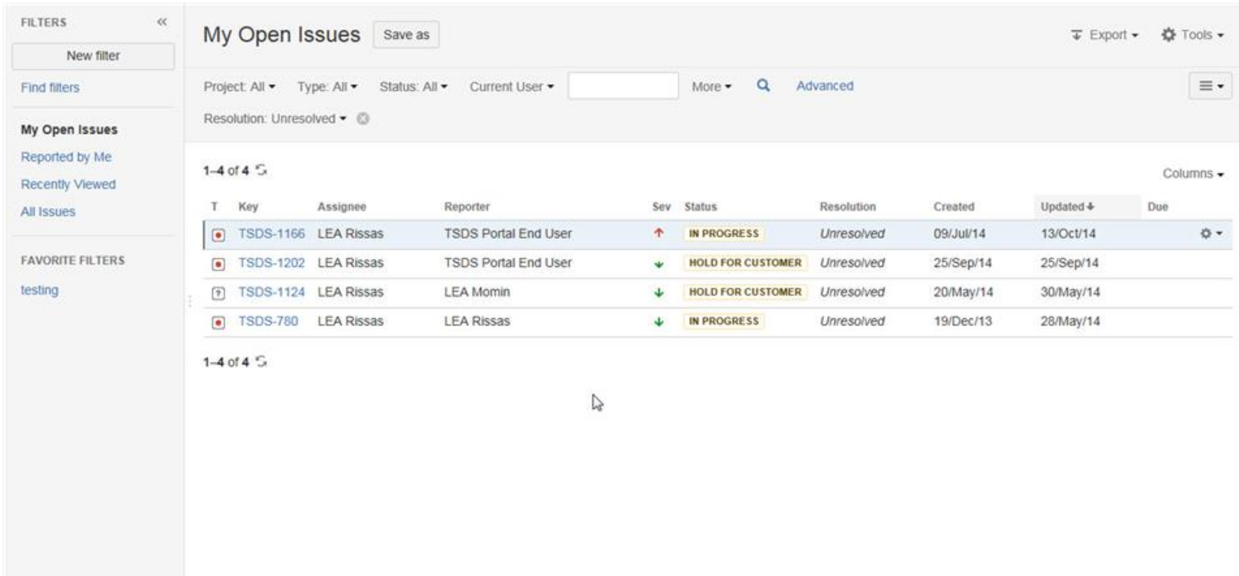
To stop watching the issue, click the **Stop watching this issue** link.

Viewing All Your Open Incidents

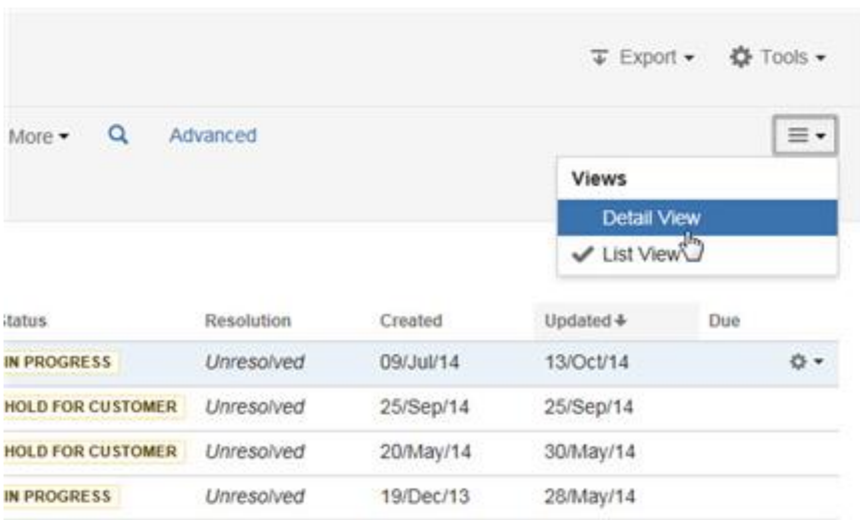
Aside from viewing your incidents in **Assigned To Me,** you can use the filter **My Open Issues** to view your open incidents. Select **Issues > My Open Issues.**



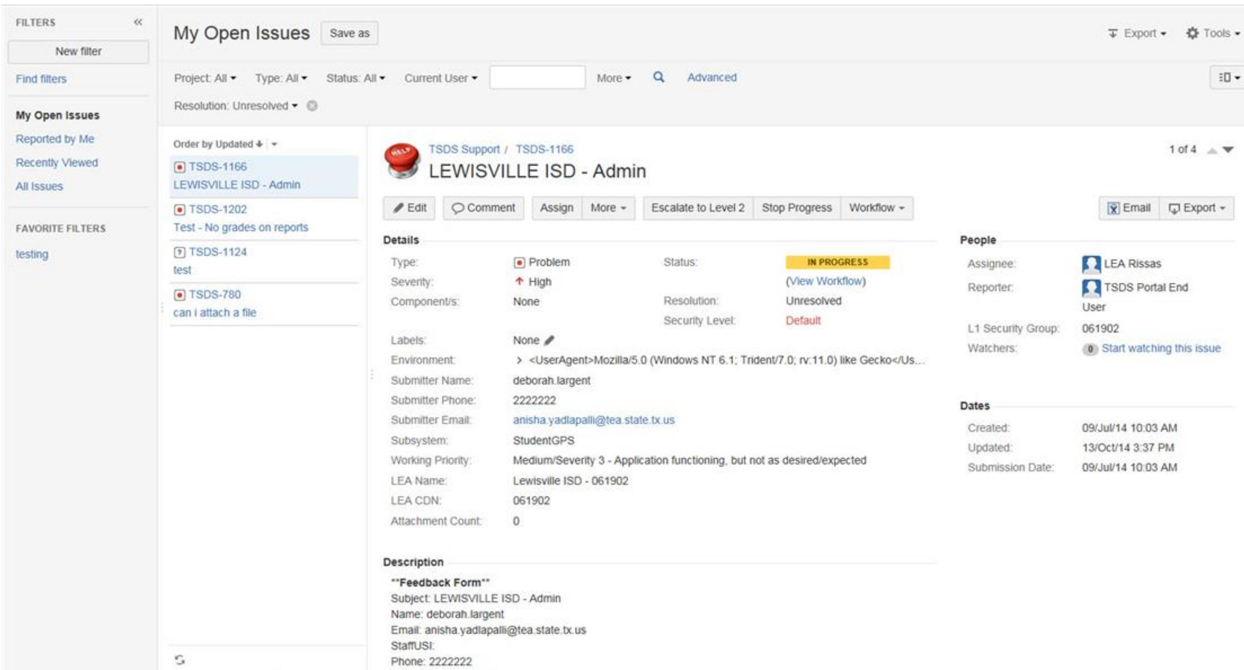
This view presents a little more information to you than the dashboard.



To see even more information, select arrow at the top right and select **Detail View:**



The Detail View appears:



Sorting

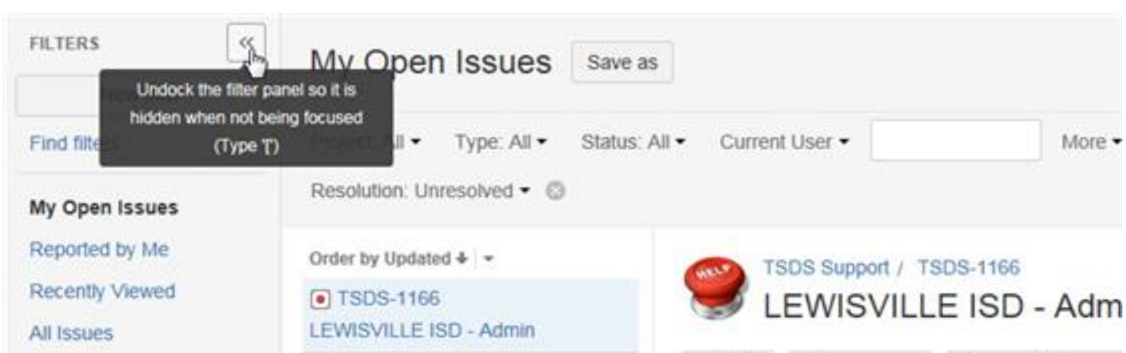
You can sort each column by clicking the header at the top of the column. Click again to sort the column in the opposite direction.

Using Filters

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

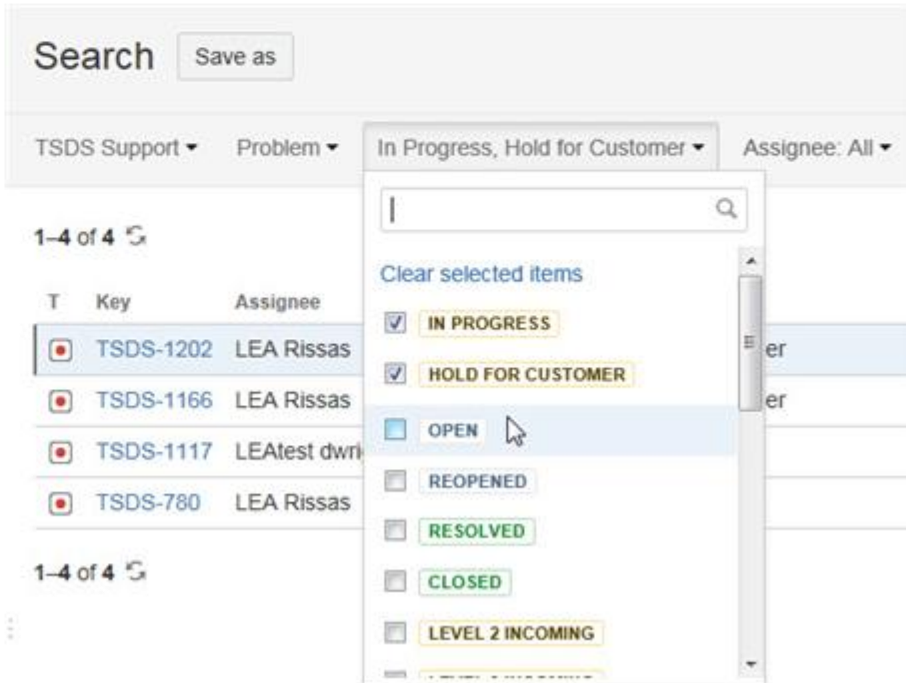
You can create additional filters following these steps:

1. Unlock the filter panel by clicking the double arrow button at the top left:



2. Click the **New Filter** button.

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



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

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

Receiving email Notifications

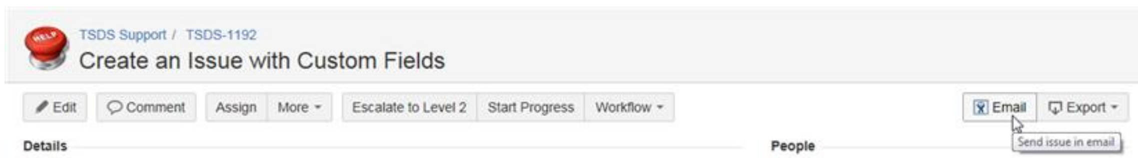
The person who automatically receives email notifications about an incident's status is the person entered as **Submitter Email** when the incident was created. This person receives emails when an incident is created and when it is resolved. See "Subscribing to Incident Updates" for more information.

Sending email Messages

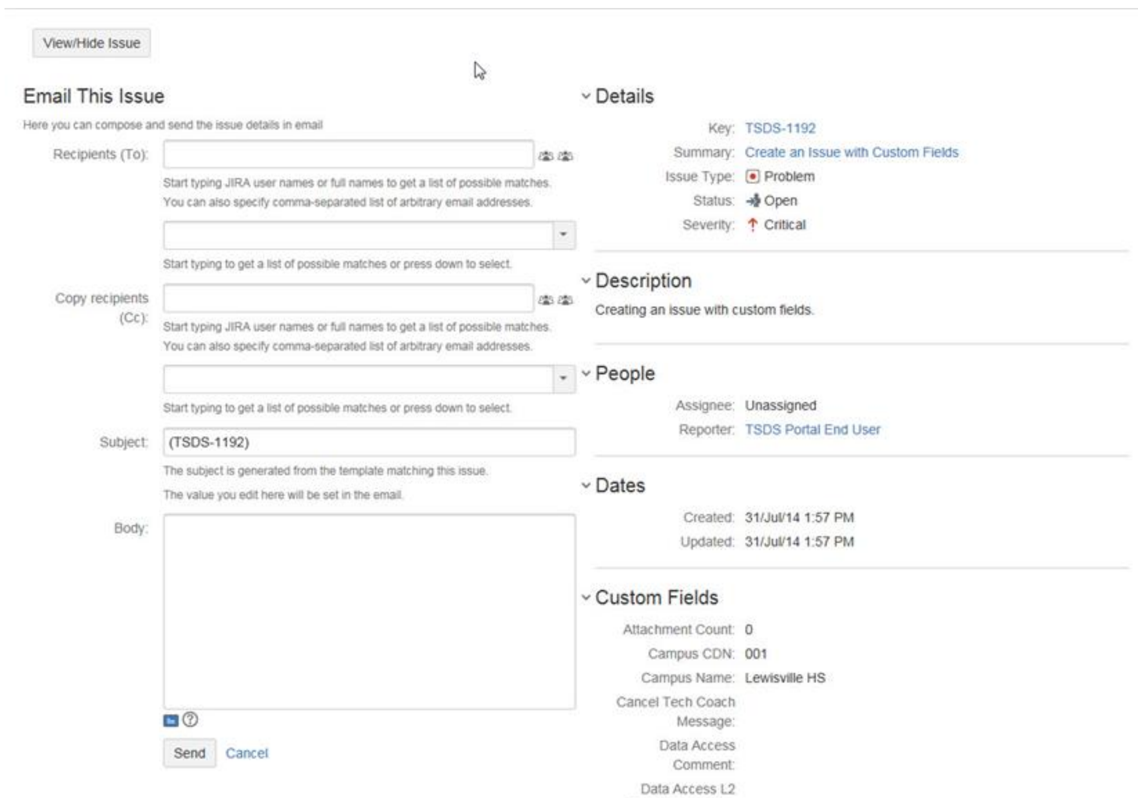
You can manually send email updates to other registered TSDS support staff from the detail view of the incident.

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

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



The following page opens:

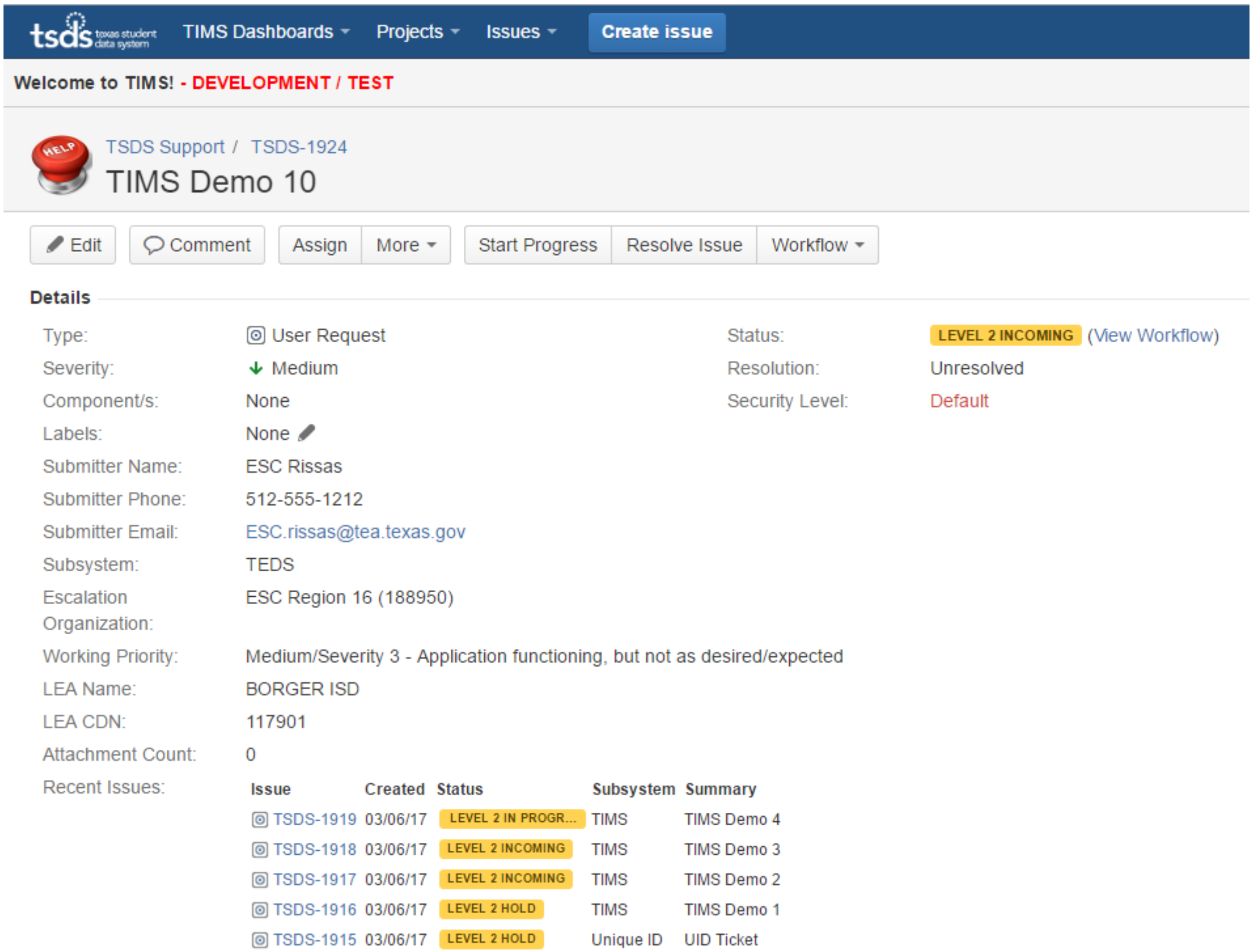


2. Begin typing the user name of the person to whom you wish to send information. As you type a user name, the system tries to identify the user. Once it does, click the name. You can enter more than one name, separated by commas.
3. Enter the name of any recipients who should receive copies.
4. Type a subject for the message.
5. Type a note about the incident.
6. Click **Send.**

Recent Issues Field

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

The **Recent Issues** field lists up to the 5 most recent tickets that were created by the organization. Tickets are displayed for that organization ID (CDN) only.



Starting Work

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

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

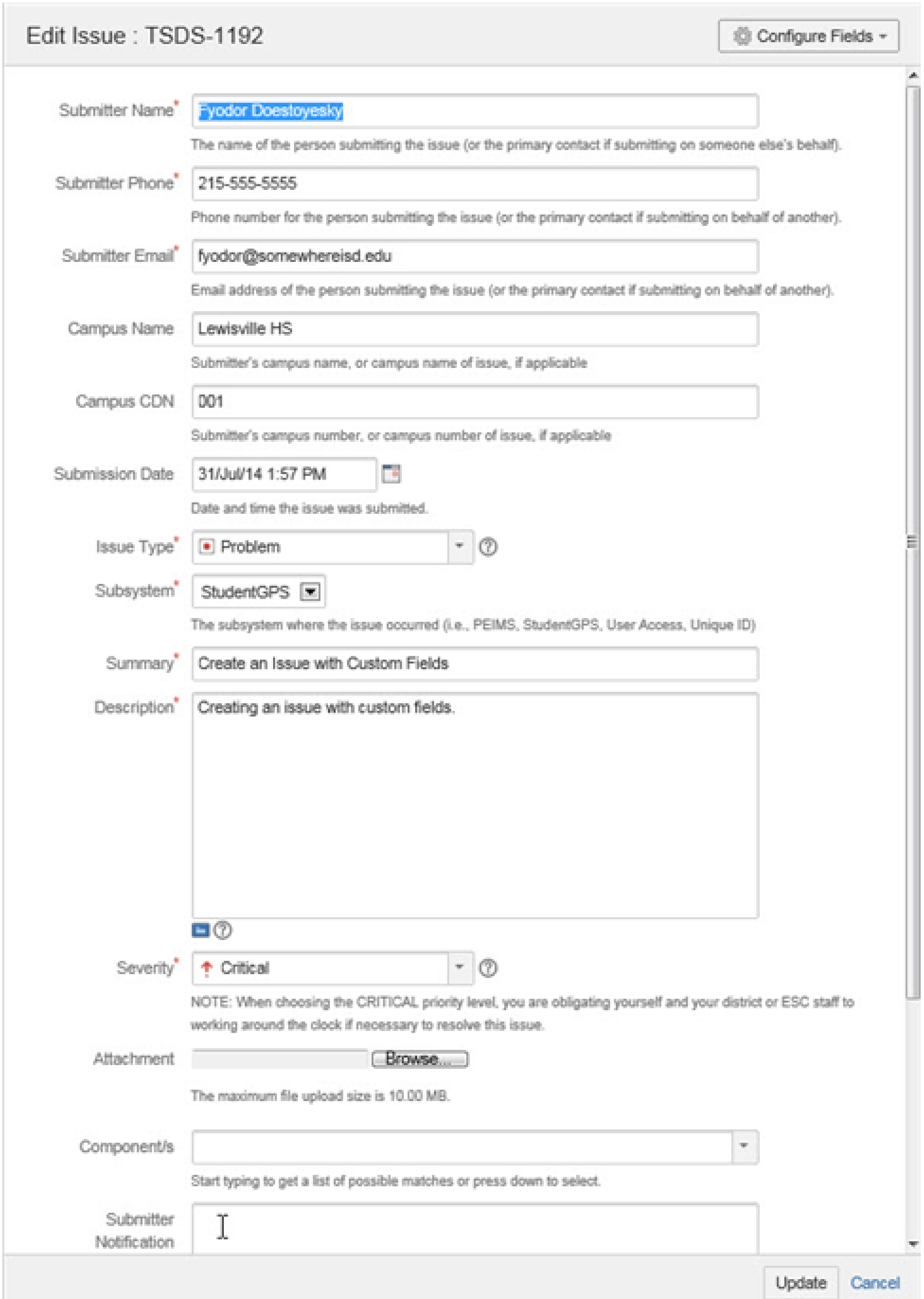
  If the incident is not in your queue, it moves into your **Assigned To Me** list. The incident's status is set to **In Progress.**

> **Note:** When you first begin working on an incident, be sure to check the Knowledge Base to see if there is already a solution posted to the problem. See the Knowledge Base section at the end of this guide for more information.

Editing an Incident

Follow these steps to edit an incident:

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



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

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

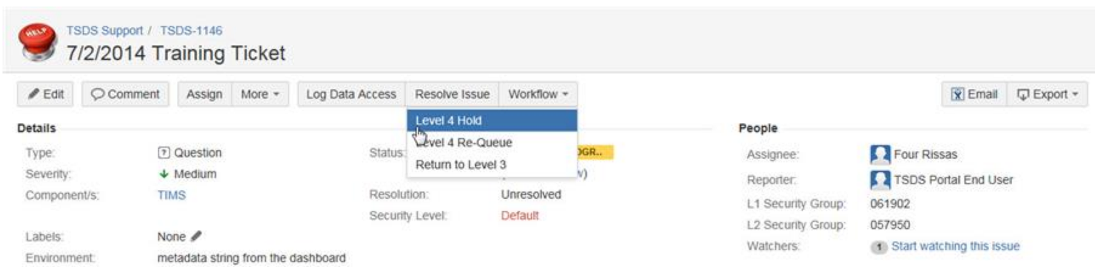
Putting an Incident on Hold

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

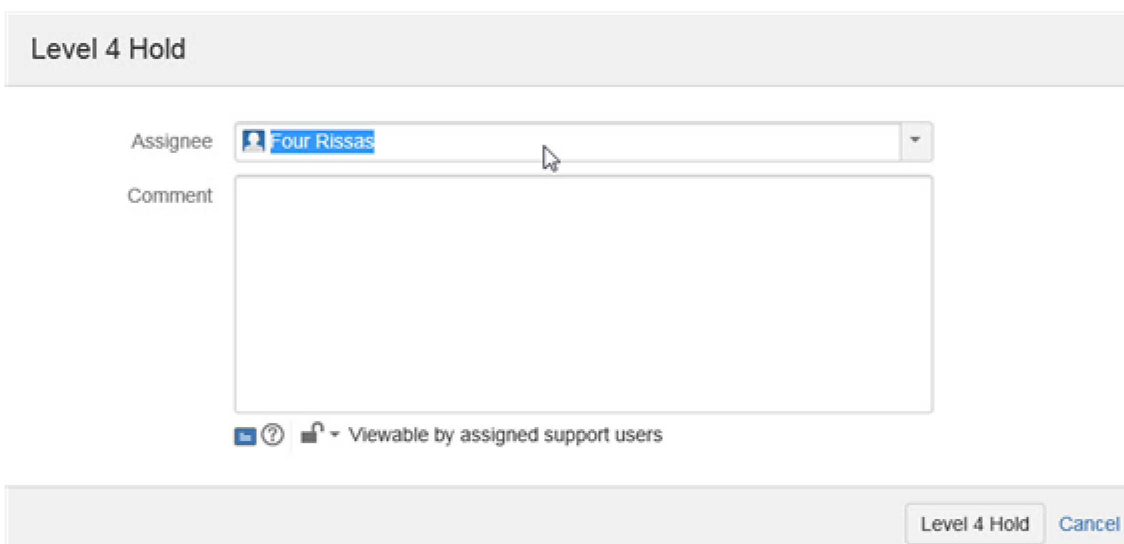
1. Select the option one of two ways:

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

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

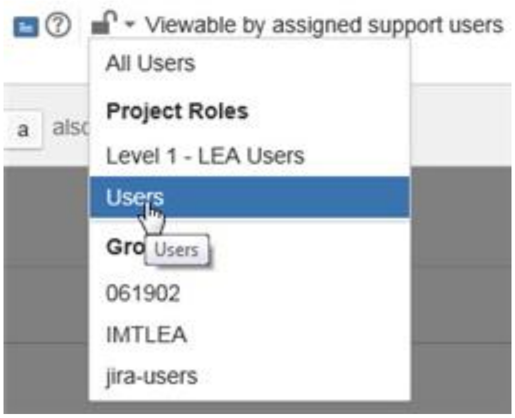


2. The dialog box that appears looks slightly different depending upon whether it opens from the queues or the detail view. The application assigns the incident to the appropriate level. The default for Level 2 through 4 Support is to send it back down to the previous level. The values that appear in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



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

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



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

Escalating an Incident to the Next Level

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

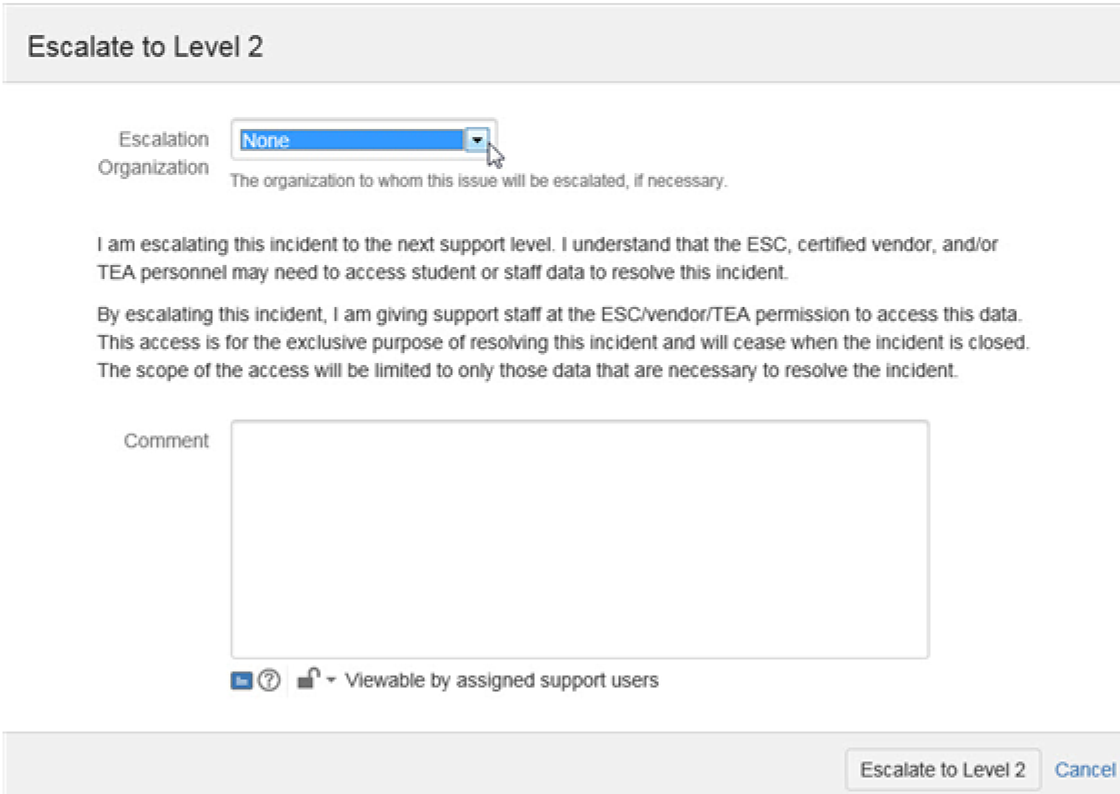
For Level 1

1. Select the escalation option:

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

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

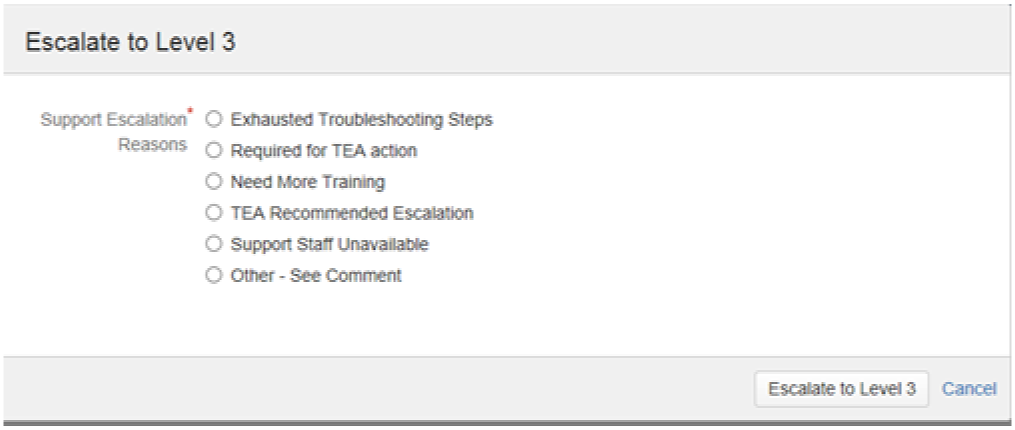
2. A dialog box like the following appears, in which you affirm that you that you are giving permission to an ESC, certified vendor, or TEA staff to look at student data if required.



3. Select the ESC or certified vendor to which the incident should be escalated.
4. Type a comment explaining what you have done so far and why the incident needs to be escalated.
5. Use the lock icon, if needed, to limit who can view the incident.
6. Click **Escalate to Level 2.**

For Level 2

1. Select the escalation option:
   - If you are already in the detail view of the incident, click **Workflow > Escalate to Level 3.**
   - From the queues, hover the mouse on the right side of the incident until the gear and arrow appear, click, and select **Escalate to Level 3.**



2. Click a support escalation reason explaining why you are escalating this problem to the next level.

> **Note:** An escalation reason must be selected before the ticket can be escalated to Level 3.

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

For Level 3

1. Select the escalation option:

   - If you are already in the detail view of the incident, click **Workflow > Escalate to Level 4.**

   - From the queues, hover the mouse on the right side of the incident until the gear and arrow appear, click, and select **Escalate to Level 4.**

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

3. Click **Escalate to Level 4.**

Returning an Incident

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

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

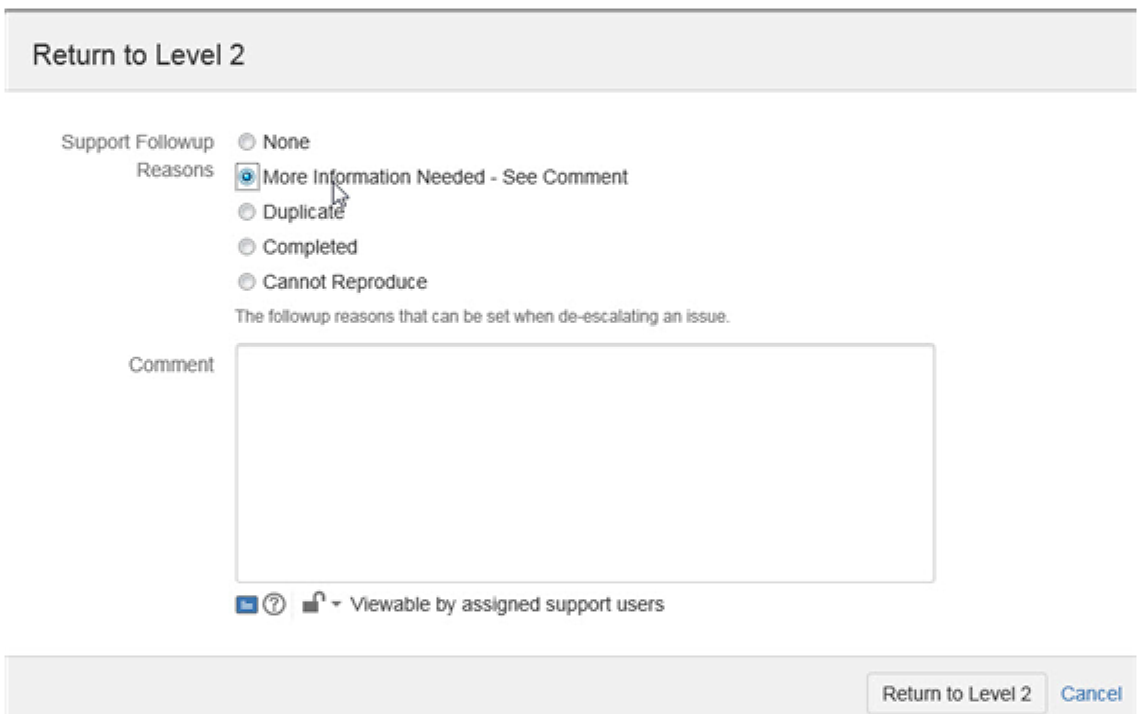
1. Select **Return to Level #** one of three ways:

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

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

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

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



2. Click the reason you are returning the incident.

3. Select the ESC region or certified vendor to which you want to escalate the incident, if it becomes necessary.

4. Type a comment detailing the information you have been asked to provide.

5. Click **Return to Level #.**

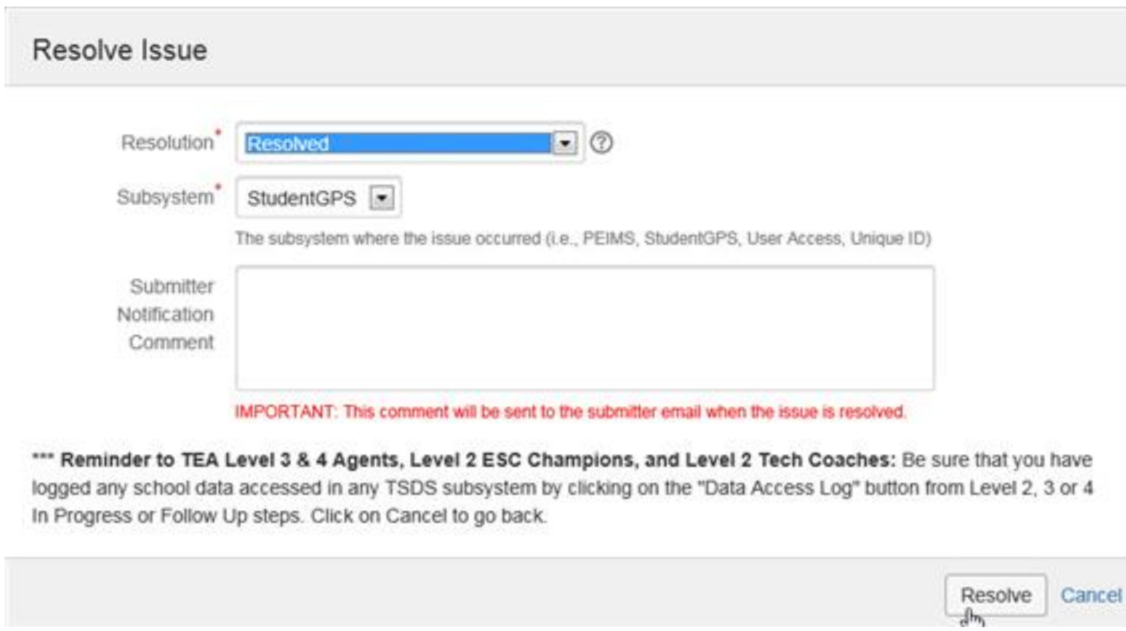
Resolving an Incident

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

1. Select the option one of two ways:

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

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



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

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

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

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

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

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

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

3. Select the subsystem where the incident occurred.

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

5. Click **Resolve.**

Adding Attachments or Screen Captures

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

Attaching Screen Captures

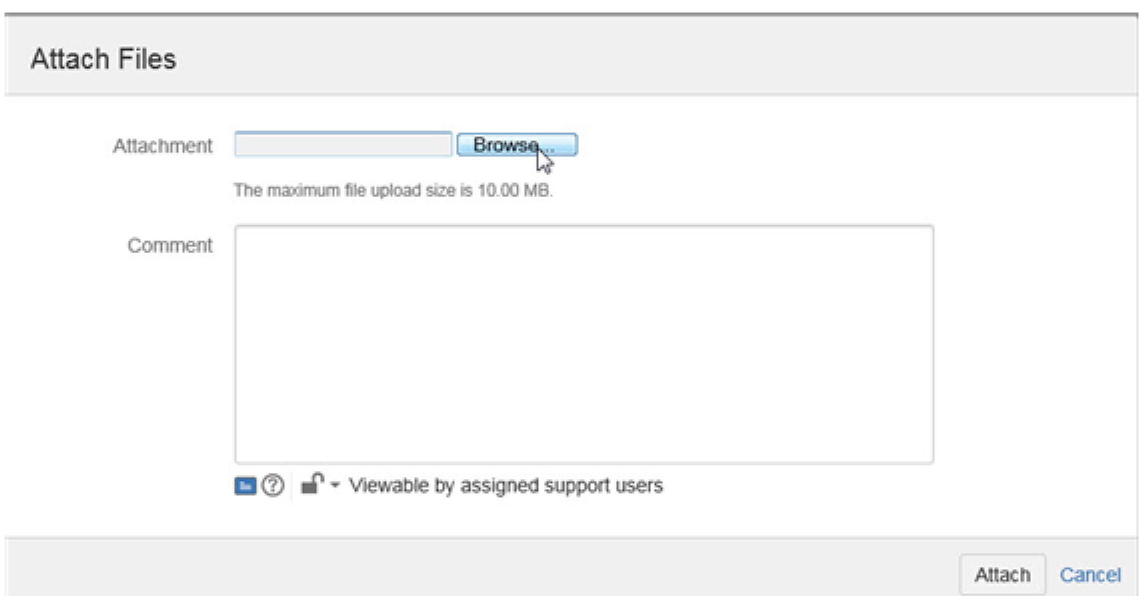
1. Select the option one of the following ways:
   - If you are already in the detail view, select **More Actions > Attach Screenshot.**
   - From the queues, hover the mouse on the right side of the incident until the gear and arrow appear, click, and select **Attach Screenshot.**
2. You may be asked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

4. Take a screen shot and copy it to the system clipboard.
5. Click the **Paste** button.

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

Attaching a File

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



3. Type a comment explaining the relevance of the attachment.
4. Click the lock icon to select who can view the comment.

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

Removing a Screen Capture or Attachment

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

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

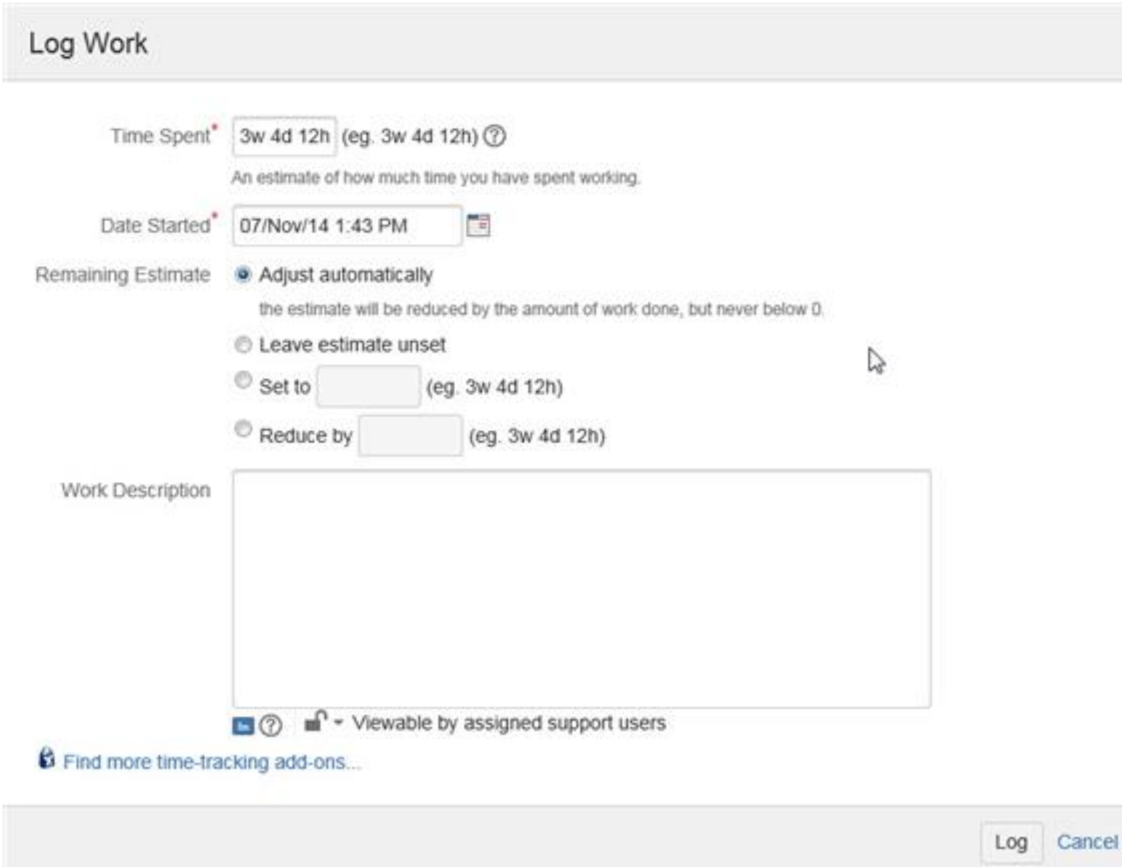
Logging and Estimating Work

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

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

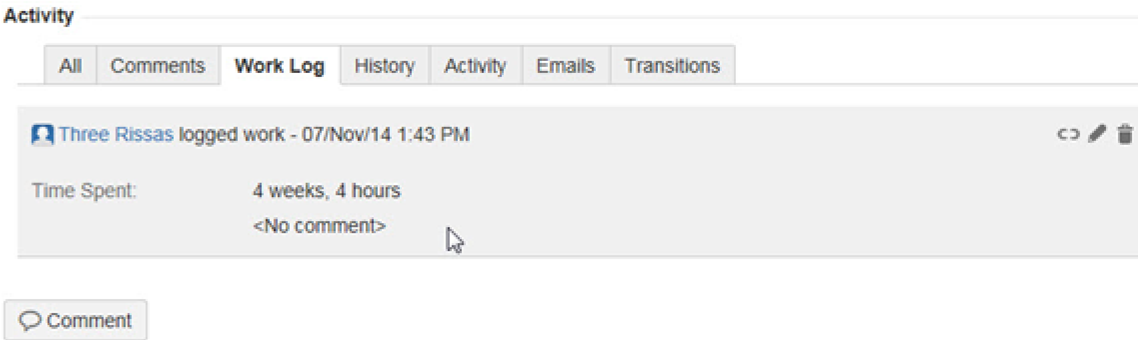
   - From either of the queues, hover the mouse on the right side of an incident until the gear and arrow icon appears, click, and select **Log Work.**

A box like the following appears:



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

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



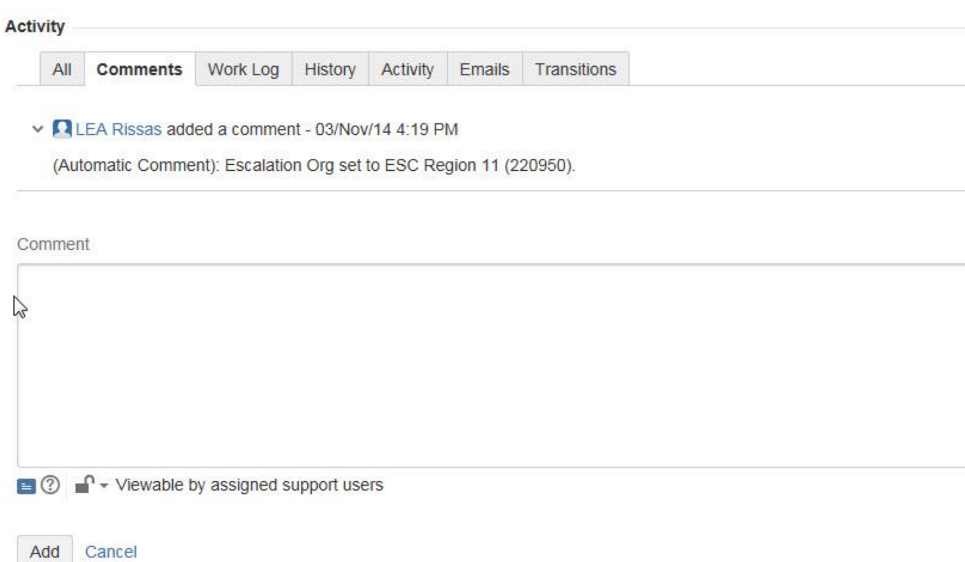
As work is logged, the time spent on an incident is tracked under **Time Tracking** in the detail view of the incident:

Commenting on an Incident

Follow these steps to add a comment to an incident:

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

   A Comment box appears like the following:



2. Type your comment.

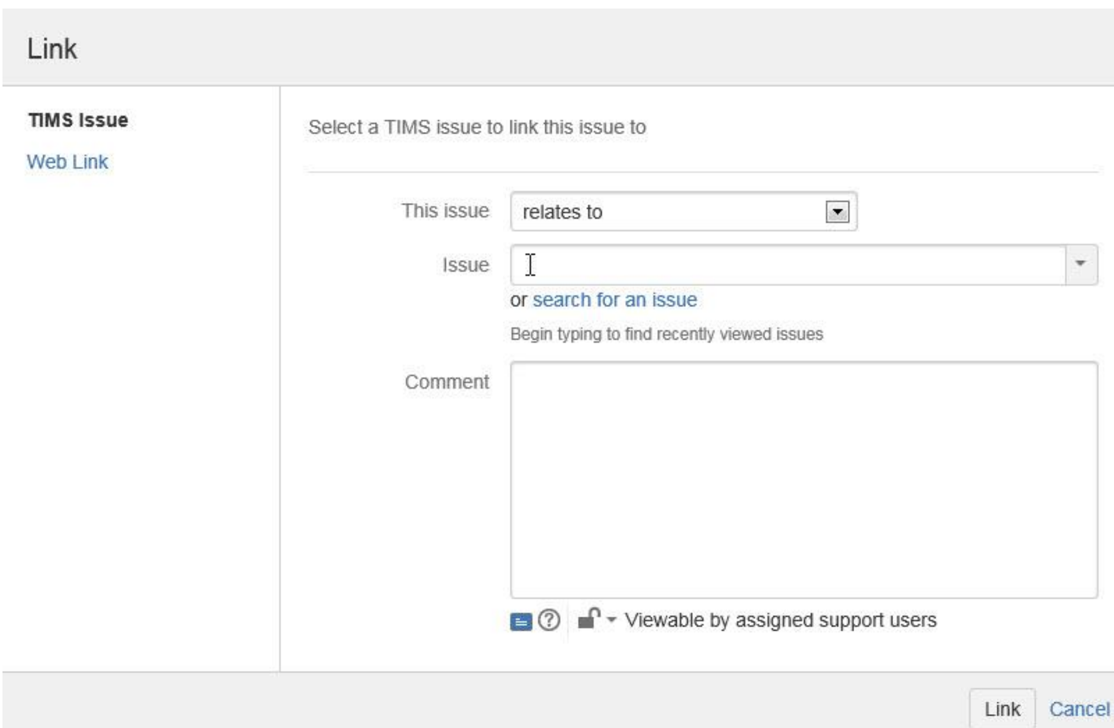
3. Use the lock icon if you want to restrict who can view the comment.
4. Click **Add.** The comment appears on the Activity pane of the detail view, under the Comments tab.

Tip To send a push notification, use *@username* then type your message. When complete, click Add and the message will be added to the ticket as well as emailed to the user selected.

Linking Incidents

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

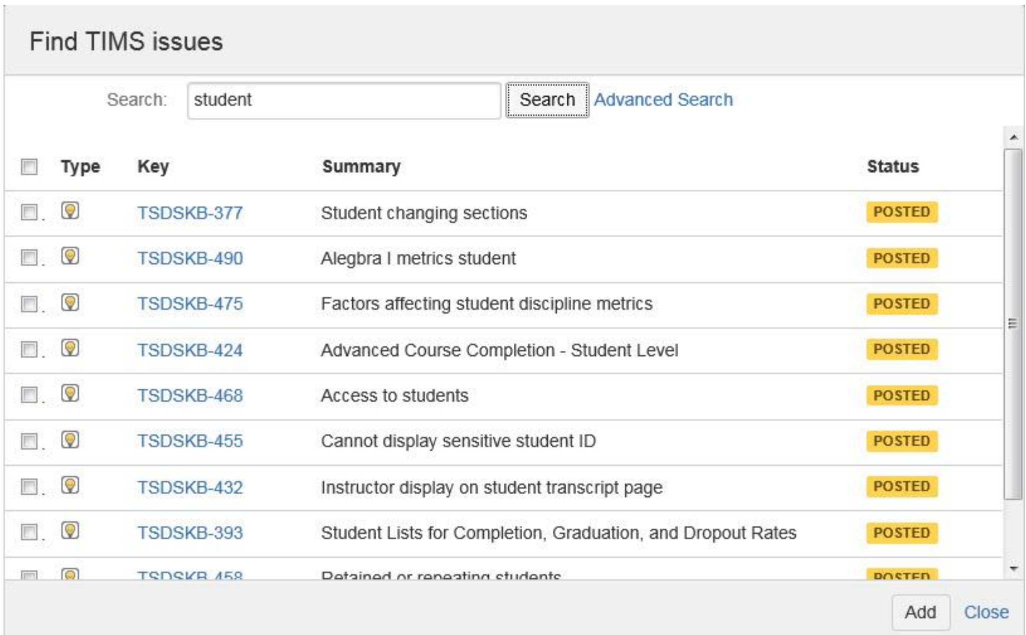
1. Select the option one of two ways:
   - If you are already in the detail view, click **More Actions > Link.**
   - From either of the queues, hover the mouse until the gear and arrow icon appears, click, and select **Link.**



2. For **This issue,** select the reason you are linking the incident to the other incident:
   - **Blocks:** not applicable for our use
   - **Is blocked by:** also not applicable
   - **Clones:** see “Cloning an Incident.”
   - **Is cloned by:** see “Cloning an Incident.”
   - **Duplicates:** is a duplicate of the other incident.
   - **Is duplicated by:** the other incident is a duplicate of this incident.

- **Relates to:** is related to the other incident.

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

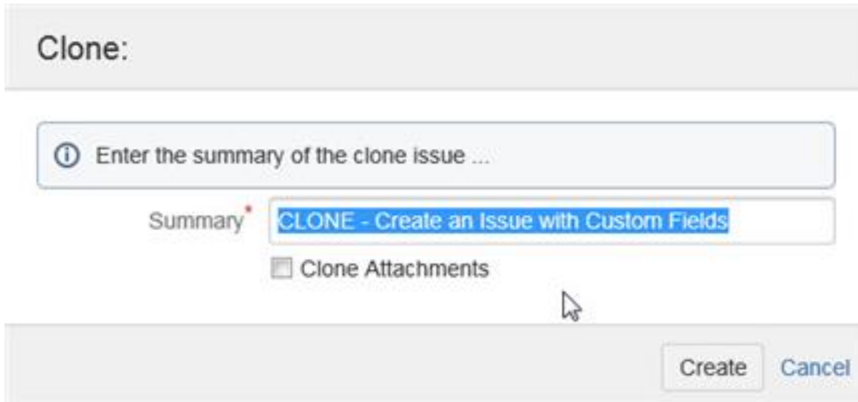


4. Click the appropriate incident. It appears in the **Issue** box with an x next to it so you can delete it, if necessary.
5. Type a comment explaining why the incidents are connected, if necessary.
6. Use the lock icon if you wish to restrict access to the comment to a specific set of users.
7. Click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

Cloning an Incident

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

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



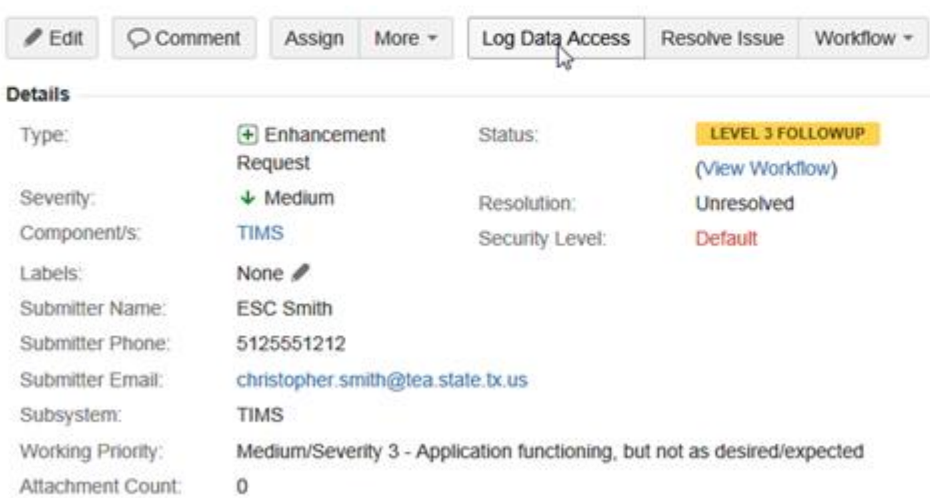
2. Type a new summary for the cloned incident, if desired.
3. Click **Create.**
4. If you are in the dashboards, the cloned incident appears in the support queue, and if you are in the detail view, it appears in your detail view where you can edit it.

Logging Data Access

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

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

1. Access the option one of two ways:
   - If you are Level 3 or 4 support and are already in the detail view of **an item that is assigned to you,** click the **Log Data Access** button in the top row of buttons:



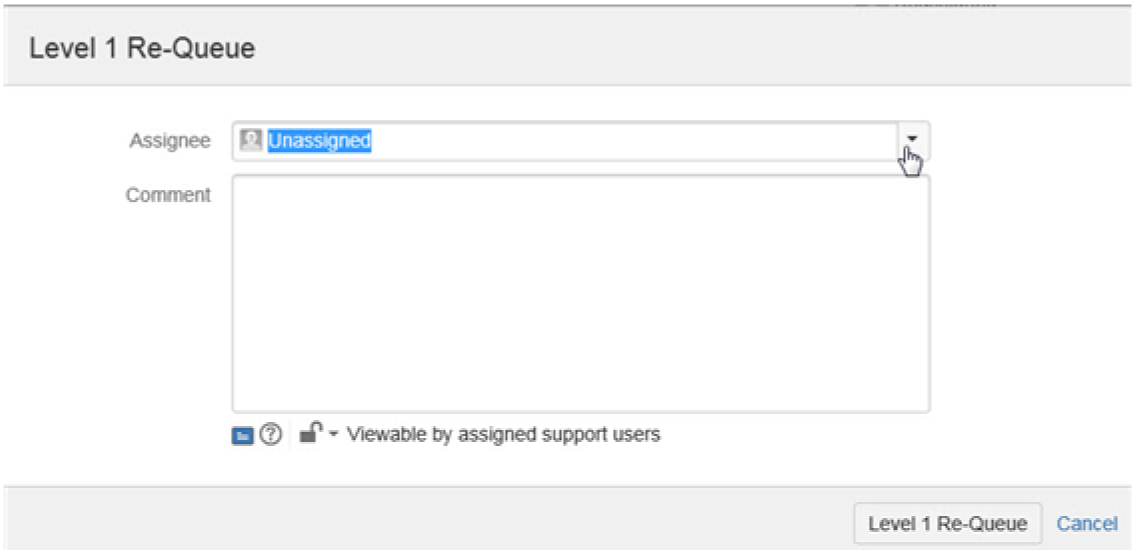
- From **Assigned to Me,** hover the mouse over the right side of the incident until the gear and arrow icon appears, click, and select **Log Data Access.**

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

Requeuing Incidents

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

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



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

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

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

Closing an Incident

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

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

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

Closing an Issue Assigned to You for Review

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

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

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

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

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

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

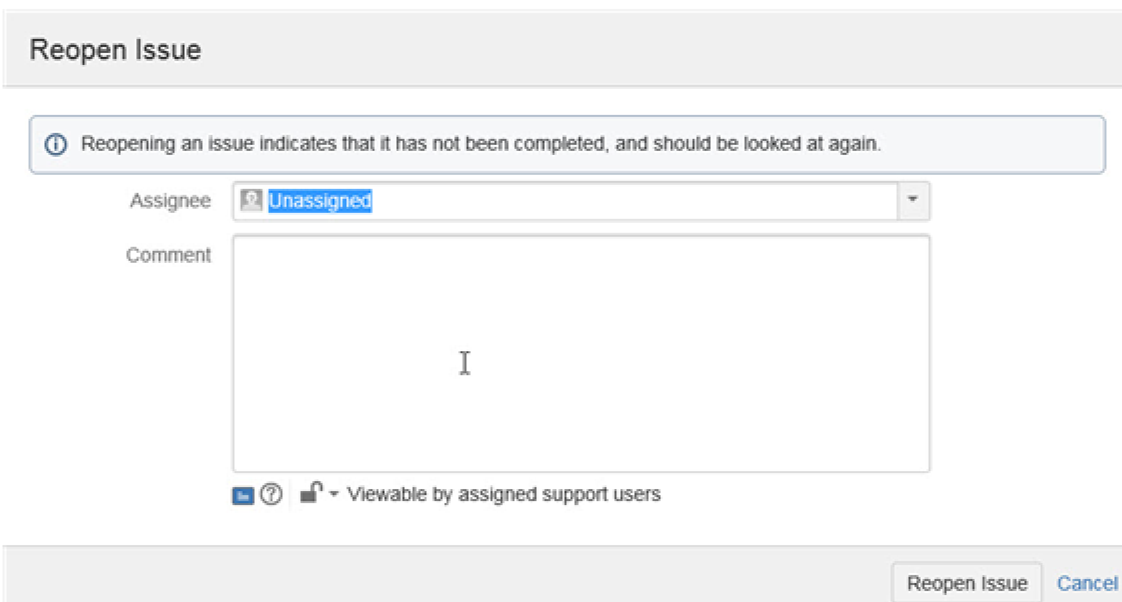
- **Won't Fix:** A determination has been made not to fix the problem.
- **Duplicate:** The incident is a duplicate of another incident.
- **Incomplete:** The issue description does not provide enough information to understand the incident.
- **Cannot Reproduce:** Attempts to reproduce the issue so as to understand the problem were not successful.

4. Select **Yes** or **No** to indicate whether a Knowledge Base article is needed.
5. Enter any comments needed.
6. Click **Close Issue.**

Reopening an Incident

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

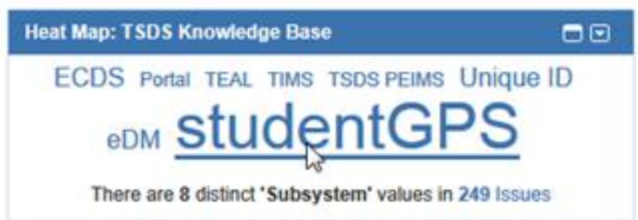
1. From **Assigned To Me,** hover the mouse over the incident until the gear and arrow icon appears, click, and select **Reopen Issue.**



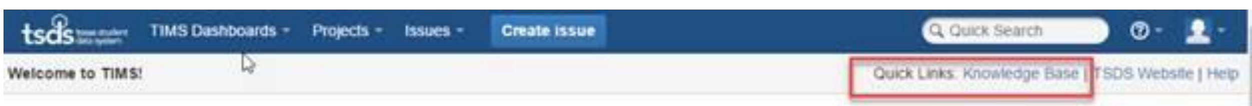
2. Leave the **Assignee** set the way it is, or if you wish to assign it to someone else, select the person's user name or begin typing it until it appears in the box and then select it.
3. Type a comment about why you are reopening the incident.
4. Use the lock icon if you wish to restrict who can view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

Consulting the Knowledge Base

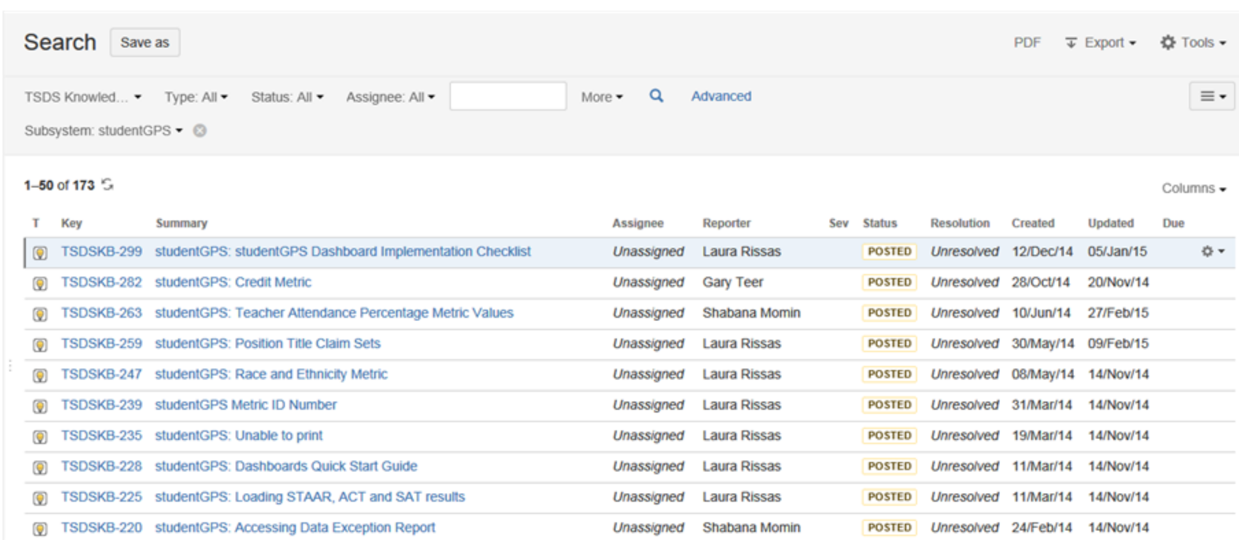
When you are working an issue, you should consult the knowledge base to see if a solution to the issue has already been identified. To do so, select the affected application from the Heat Map**.**



The Quick Links in the upper right corner of the TIMS dashboard include a link to the Knowledge Base:

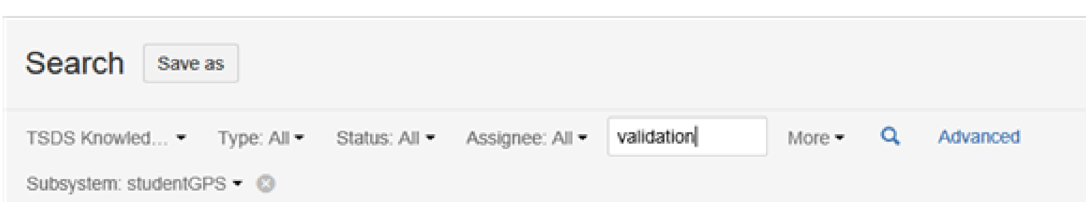


Click on this link and a list of the knowledge base articles will appear. The knowledge base articles can be sorted depending on the columns that are viewable (i.e. sort by KB number, summary or subsystem).

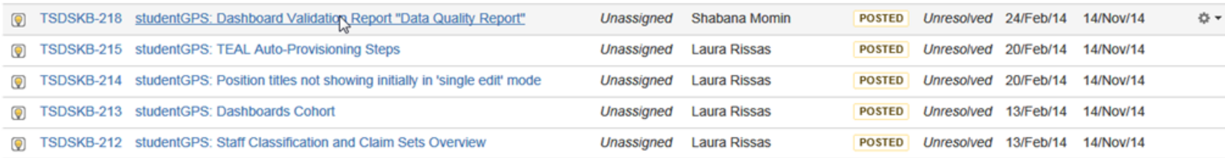


T	Key	Summary	Assignee	Reporter	Sev	Status	Resolution	Created	Updated	Due
	TSDSKB-299	studentGPS: studentGPS Dashboard Implementation Checklist	Unassigned	Laura Rissas		POSTED	Unresolved	12/Dec/14	05/Jan/15	
	TSDSKB-282	studentGPS: Credit Metric	Unassigned	Gary Teer		POSTED	Unresolved	28/Oct/14	20/Nov/14	
	TSDSKB-263	studentGPS: Teacher Attendance Percentage Metric Values	Unassigned	Shabana Momin		POSTED	Unresolved	10/Jun/14	27/Feb/15	
	TSDSKB-259	studentGPS: Position Title Claim Sets	Unassigned	Laura Rissas		POSTED	Unresolved	30/May/14	09/Feb/15	
	TSDSKB-247	studentGPS: Race and Ethnicity Metric	Unassigned	Laura Rissas		POSTED	Unresolved	08/May/14	14/Nov/14	
	TSDSKB-239	studentGPS Metric ID Number	Unassigned	Laura Rissas		POSTED	Unresolved	31/Mar/14	14/Nov/14	
	TSDSKB-235	studentGPS: Unable to print	Unassigned	Laura Rissas		POSTED	Unresolved	19/Mar/14	14/Nov/14	
	TSDSKB-228	studentGPS: Dashboards Quick Start Guide	Unassigned	Laura Rissas		POSTED	Unresolved	11/Mar/14	14/Nov/14	
	TSDSKB-225	studentGPS: Loading STAAR, ACT and SAT results	Unassigned	Laura Rissas		POSTED	Unresolved	11/Mar/14	14/Nov/14	
	TSDSKB-220	studentGPS: Accessing Data Exception Report	Unassigned	Shabana Momin		POSTED	Unresolved	24/Feb/14	14/Nov/14	

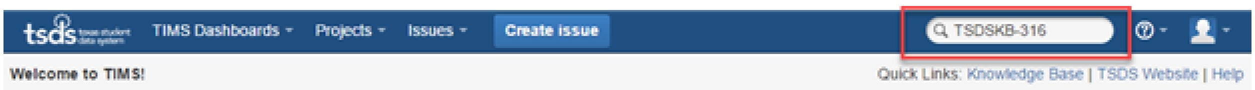
You can search this list by typing a term in the search box and clicking Enter:



Click the title of an article to open it:



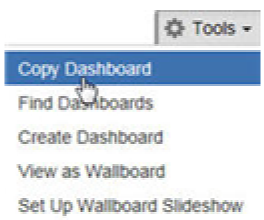
TIMS users can also use the Quick Search box in the upper right corner of the TIMS dashboard to search for knowledge base articles. You can search by entering the knowledge base article number (TSDSKB-###) or by keyword.



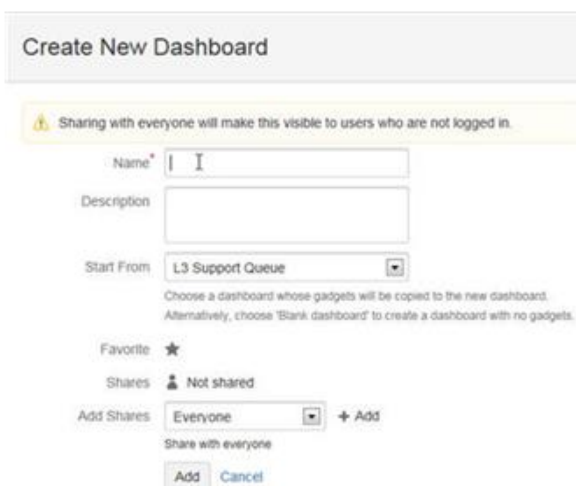
Adding a Gadget to Your Dashboard

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

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



2. Type a name for the new dashboard.

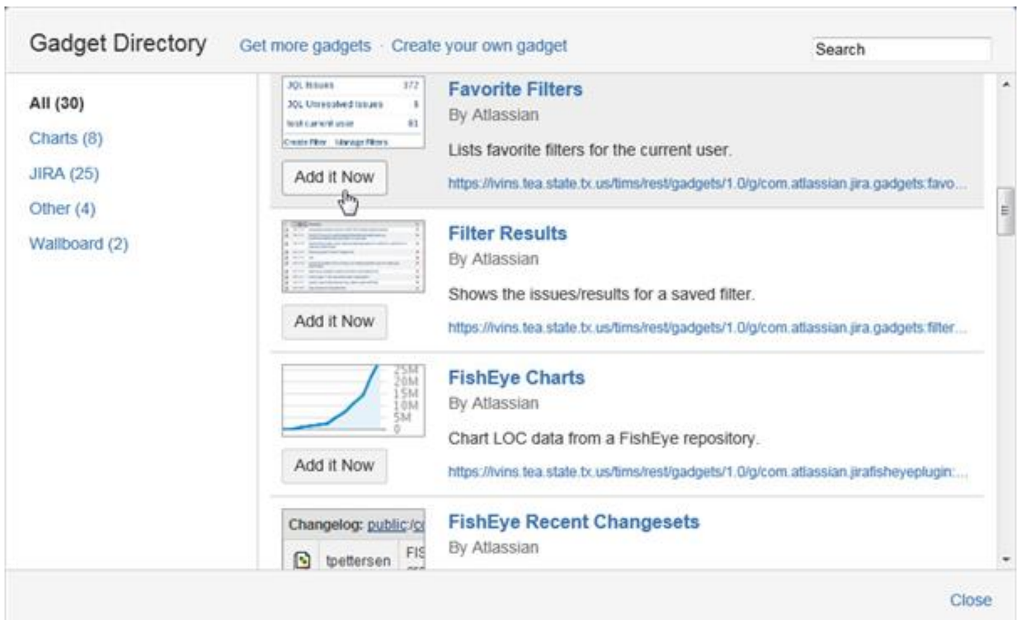


3. You do not need to change any of the other settings, but type a description if you wish.

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

5. Click **Add Gadget.**

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



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

8. Now you must select configure the filter.

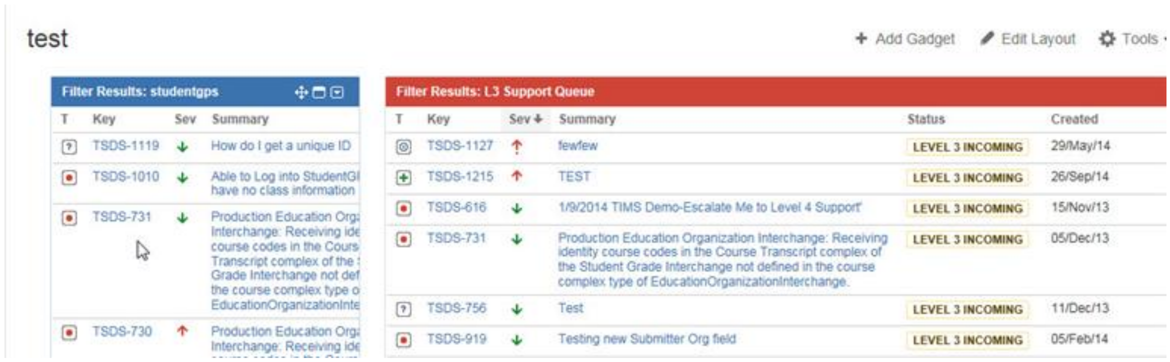
9. Begin typing the name of the filter and then select it, or use the **Advanced Search** to find it.

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

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

12. Change the Refresh Interval, if desired.

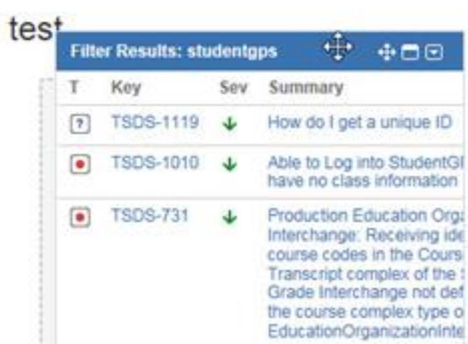
13. Click **Save** to save the filter to the dashboard.



Adjust the Dashboard

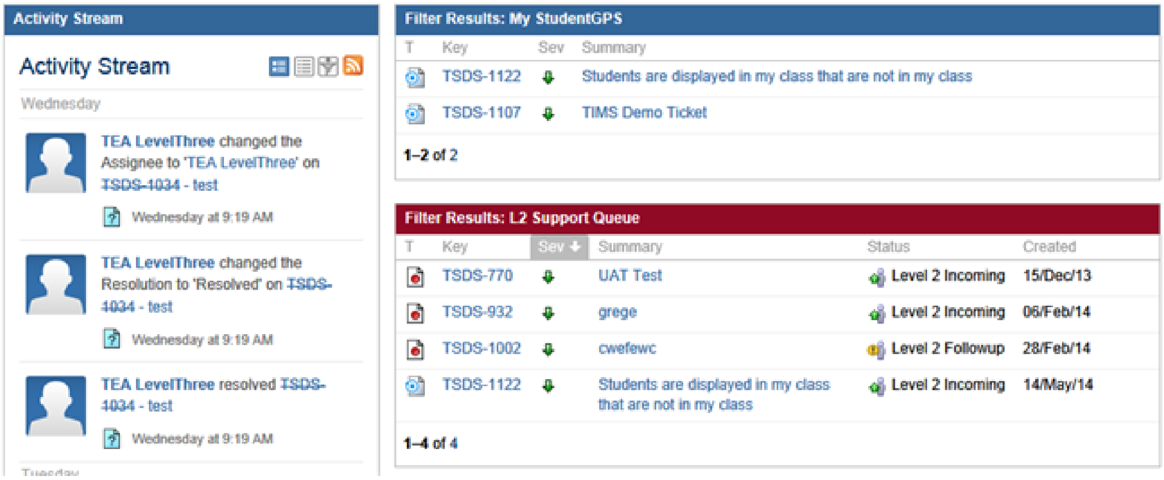
If you like where the new dashboard is located, you can leave it there. However, you can also move it. Suppose, in the example above, we want to switch the location of the **L2 Support Queue** and the **My studentGPS** filter.

1. Hover the mouse over the gadget to be moved until you see the standard icon for moving things.
2. Click the icon and drag the gadget to its new position.



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

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

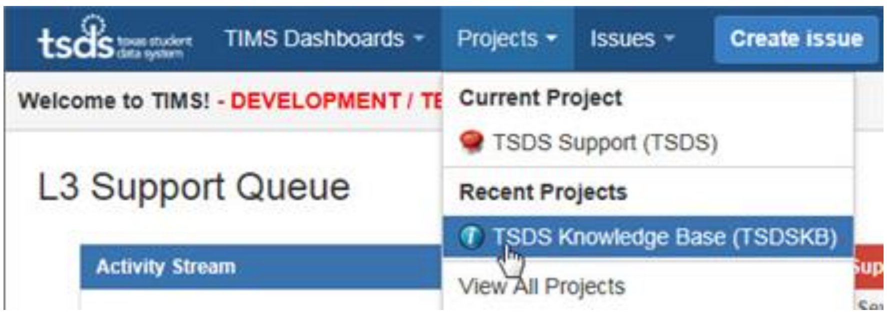


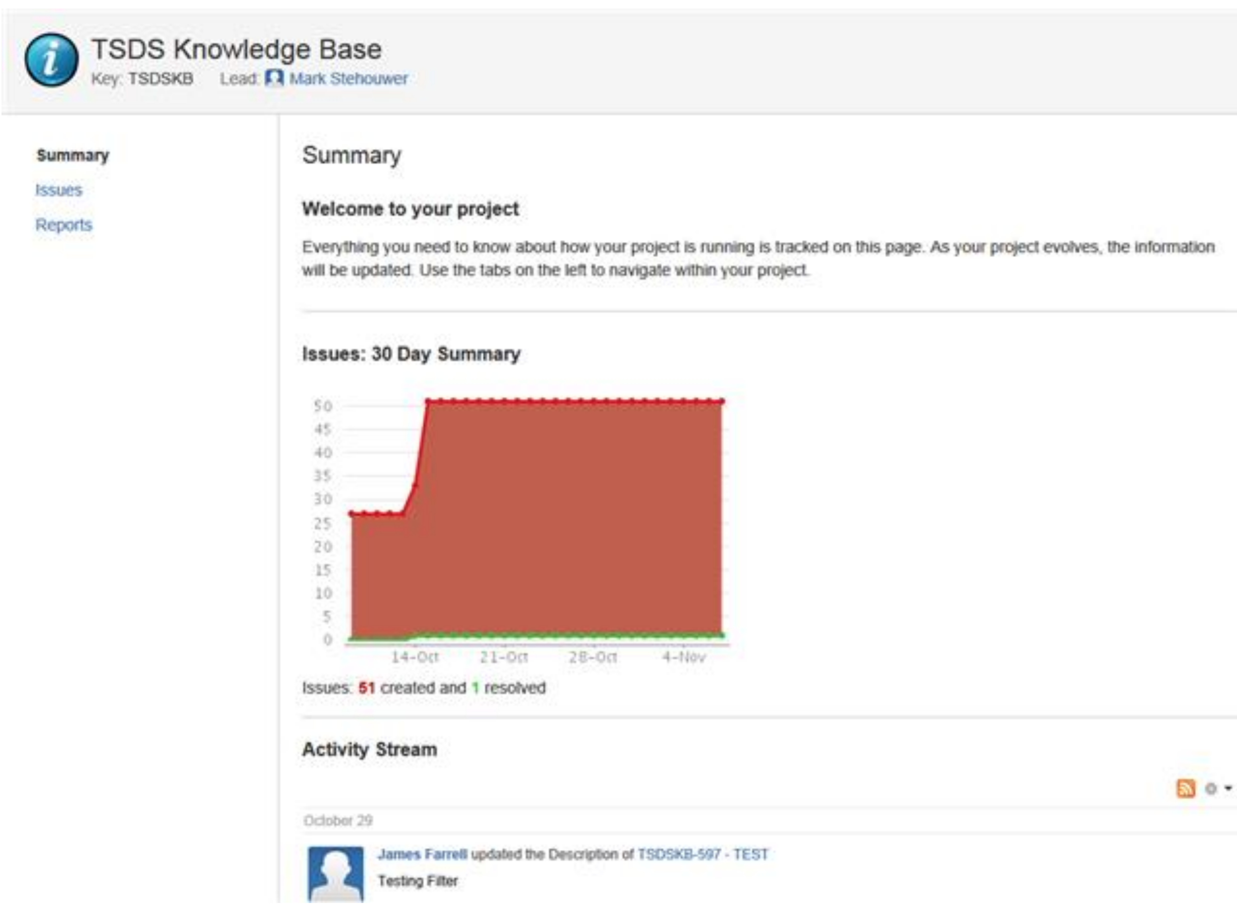
Working with the Knowledge Base

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

Switching Projects to the Knowledge Base

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





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

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

Posting a Knowledge Base Article

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

1. Open the detail view of the incident either from your queue or from the Knowledge Base views**Error! Reference source not found.**.
2. Make sure that the incident is thoroughly edited to include a good description of the problem and the solution. Below is a template you can use to make sure you include important information:

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

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