Single point of contact	• Is a 'one-stop-shop' for ICT users and ICT staff • Administers a central repository of information
Who?	This is an **administrative** function, to be carried out by an administrator.

Important!

- The person assigned to this function must be someone who can be reached in the same place at school throughout the school day.
- Do not delegate this function to a technician, because that will lead to a conflict of interests.
- You may assign this function to more than one person but they must work as one.
- Do not split this function.

Summary of tasks		
Start-up or occasional tasks	**Regular tasks**	**Frequency**
Start-up task 1 Set up telephone, voicemail and email communications.		You must do this before your Primary FITS start date.
Start-up task 2 Create a physical and electronic filing system for keeping all ICT documents and records.		You must do this before your Primary FITS start date.
Start-up task 3 Document the procedure for logging requests and incidents.		You must do this before your Primary FITS start date.
	Log incidents and requests for ICT users.	As required
	Maintain a log of incidents.	As required
	Co-ordinate problem sheets between first- and second-level support.	As required
	Maintain a log of problems.	As required
	File ICT documents and records.	As required
	Update the asset log and licence list with changes.	As required
	Create service report.	Monthly

Function single point of contact

Task	Page

1. Set up communications

Outcomes

Once you have fully completed this task, you will have:

- **A method for all ICT users to report ICT incidents and requests**
- **Details to go into the ICT support procedure document (see next task)**
- **Started to prepare for Primary FITS to go live.**

Introduction to task

The main role of the single point of contact is to provide ICT users with access to ICT assistance by co-ordinating, prioritising and delegating efficiently and effectively the tasks involved. As the single point of contact, you must be reachable at all agreed times – ideally throughout every school day.

Even if face-to-face communication may be appropriate and you prefer it, there will be times when an additional method of contact such as telephone and/or email may be useful.

If you decide to use the telephone for this, the most important thing is to ensure that calls are answered promptly. An answering machine or voicemail facility is essential for those times when it is impossible to answer the telephone personally. But it is important not to abuse this: users will get frustrated if their messages go unanswered too long and they will revert to their previous, less effective, methods of communicating with technical support.

To some extent, the methods of communication you choose will depend on your own circumstances. You may find that, for you, a pager or a mobile telephone works better than a desk telephone and answering machine. As long as you can give priority to calls and users can reach you, you can operate from a virtual location if necessary.

Instructions for setting up communications

The instructions that follow are necessarily general, because local decisions and procedures will have a bearing on how you tackle these tasks.

1. Decide what type of telephone access you will have. Things to consider include:
   - Whether to have a desk or mobile telephone
   - Whether to use your own current number or set up a dedicated one.

Discuss this with the ICT owner before making a final decision.

Tip

If you don't know how many calls to expect at first, start by using your current number and get a feel for how busy your telephone is.

If you find that users can't always get through to report ICT incidents, ask for feedback and install a dedicated line.

2. Arrange for any purchasing and/or installation to be carried out.
3. Record a message on the voicemail or answering machine, which includes:
   - A request for the caller to leave their name, contact details and the time of their call
   - An indication of how long they may have to wait for a return call.
4. Decide whether to have email access as well as telephone access. You can either use your own personal email address with folders for filing, or set up a separate email address.
5. If you have decided to have a separate email address, arrange for it to be created and access set up on your computer.
6. Set up folders for filing emails. You should keep them for at least a month, because they may help you to validate call numbers for the monthly service report.

2. Create a filing system

Outcomes

Once you have fully completed this task, you will have:

- **One central storage location for all procedures, templates, examples and records**
- **One central storage location for all software**
- **Reduced the risk that old versions will be used in error.**

Introduction to task

It is important to keep all documentation and software centrally, to enable you to control it and make the correct versions available when necessary. The Primary FITS toolkit CD contains not only templates, examples and instructions, but also a folder structure for your records and software backups. The toolkit CD is structured in a way that is easily transferable for practical use.

In this task you will copy the toolkit CD to a local computer to give you easy access to tools and to create your own records and a filing structure for software backups. Ideally the computer to which you copy the CD should be a shared file server. This will make it easier to give others access, make backups and grant appropriate rights to it.

You will also create folders for hard copies of some records and prepare storage for original media.

You will need

- **The toolkit CD**
- **About 20MB disk space (on a local computer or server), plus additional space as required for software**
- **Four lever-arch files and labels**
- **Media storage boxes**

Instructions for creating a filing system

1 Decide where to copy the toolkit CD. You may need to discuss this with technical staff or the ICT owner to identify the most suitable place.

2. Copy the toolkit CD.

3. Grant access to authorised users.

4. Using the lever-arch files and labels, create folders for the following documents:
    - Incident and request sheets
    - Problem sheets
    - Requests for change
    - Install build checklists.

    These are the documents that you are most likely to keep as hard copy. You may, of course, create other hard-copy folders if you wish.

5. Prepare the media storage boxes for filing original software discs. How many you need and how you organise them will depend on the type and volume of software in use at your school.

Tip

Remember to write-protect all instructions, templates and examples, to prevent unauthorised or accidental change.

3. Document the support procedure

Outcomes

Once you have fully completed this task, you will have:

- **A one-page document – both for distribution and also to display as a poster – clearly describing the support procedure to be followed by all ICT users**
- **A baseline document for update as required**
- **A readymade document for issuing to new staff**
- **Documentary backup for your procedure.**

Introduction to task

ICT users need to know how to get technical support. If you don't tell them how you want them to do it, they will find an unofficial route that will undermine what you are trying to achieve.

In this task you will create a support procedure by using our template and adding your own details:

- School name
- Contact telephone number
- Email address, if you are using one
- Hours of availability
- Contact details for users to escalate ICT support issues or complaints (usually the ICT owner).

You will need

From the toolkit CD (Primary FITS tools\Service Desk\)

- **Support procedure template**

When the procedure is ready, the ICT owner should distribute it to all ICT users. This is important because it demonstrates that school leaders are committed to the procedure. The toolset for the ICT owner includes this task.

Creating the support procedure document will be discussed in Primary FITS implementation meetings with the ICT owner – this is one of the steps in the implementation plan checklist (see section 4 of the guidance).

Instructions for documenting the support procedure

1. Download the document you need from the toolkit CD:
   - *Primary FITS\Service Desk\Support procedure template.doc*
2. In the space provided, enter the name of the school.
3. In the space provided, enter the telephone number that you decided in task 1 to use for the single point of contact.
4. In the space provided, enter the email address for the single point of contact that you decided on in task 1, if applicable. If you have decided against using email, delete this section on the template.
5. In the space provided, enter the hours of availability.
6. In the space provided, enter the name and telephone number of the ICT owner.
7. Give the support procedure to the ICT owner for distribution.
8. File the procedure electronically (Primary FITS records\Support procedures) and update it as necessary with any changes made to the procedure.

Tip

You should agree your hours of availability with the ICT owner. If you don't include the times of your meal breaks in the procedure, remember to state them in your voicemail message.

4. Log incidents and requests

Outcomes

Once you have fully completed this task, you will have:

- **Implemented a method of capturing the details of ICT user incidents and requests for first-level support to attend**
- **Implemented a central record of incidents and requests for analysis and reporting.**

Introduction to task

One of the main activities of the single point of contact is fielding incidents and requests from ICT users. As single point of contact, it is your responsibility to gather and record details of incidents and requests and pass them to first-level support for resolution.

The main activities in this task are:

- To create an incident sheet for each incident or request
- To keep a central incident log of incident and request details and their resolution.

You will need

From the toolkit CD (Primary FITS tools\Incident Management\)

- **Incident sheet template**
- **Incident sheet notes for completion**
- **Incident log template**
- **Incident log notes for completion**

Instructions for logging incidents and requests

1. Download the documents you need from the toolkit CD (or use the local copy you created in task 2):
   - *Primary FITS tools\Incident Management\Incident sheet template.doc*
   - *Primary FITS tools\Incident Management\Incident sheet notes for completion.doc*
   - *Primary FITS tools\Incident Management\Incident log template.xls*
   - *Primary FITS tools\Incident Management\Incident log notes for completion.doc*
2. Copy the templates to the incident sheet folder in the structure you created in task 2:
   - *Primary FITS records\Incidents\Incident sheet template.doc*
   - *Primary FITS records\Incidents\Incident log template.xls*
3. You can print or photocopy the incident sheet template several times ready for filling in by hand, or you can use the template electronically to create a new typed document for each incident. Use the method that suits you.
4. Wait for users to call with incidents or requests. When they do, complete the first section of an incident sheet for each one, using for guidance the incident sheet notes for completion. You will give the incident sheet to first-level support for action.
5. Enter the details of the incident or request into the incident log, using for guidance the incident log notes for completion. The incident log is your central record.
6. Inform first-level support that you have a new incident or request. It is their job to attend to these promptly and put in place the quickest functional solution possible.
7. Collect (or chase) resolution details of incidents and requests from first-level support, who should return the completed incident sheet to you.
8. Update the incident log with closure details, using for guidance the incident log notes for completion.
9. File the incident sheet in the lever-arch file you made for this purpose in task 2 above.

Tip

If the user's incident or request is urgent you can, of course, contact first-level support before you enter the details in the incident log.

But remember to keep a copy of the details if first-level support takes away the incident sheet before you've updated the log!

5. Maintain problem log

Outcomes

Once you have fully completed this task, you will have:

- **Implemented a method of co-ordinating problem sheets between first- and second-level support**
- **Implemented a central record of problems for analysis and reporting.**

Introduction to task

Incident resolution is about getting the user working again as quickly as possible. This may involve first-level support in swapping some equipment or diverting printing to another printer, for example. When the incident itself has been resolved, first-level support must create a problem sheet to make sure that the problem that caused it gets dealt with.

First-level support is responsible for creating the problem sheet and second-level support is responsible for resolving the problem.

The single point of contact is responsible for passing problem sheets to second-level support and for maintaining a log of problems, similar to the incident log we described in task 4.

You will need

From the toolkit CD (Primary FITS tools\Problem Management\)

- **Problem log template**
- **Problem log notes for completion**

Instructions for maintaining problem log

1. Download the documents you need from the toolkit CD (or use the local copy you created in task 2):
   - *Primary FITS tools\Problem Management\Problem log template.xls*
   - *Primary FITS tools\Problem Management\Problem log notes for completion.doc*
2. Copy the template to the problems folder in the folder structure you created in task 2:
   - *Primary FITS records\Problems\Problem log template.xls*
3. Wait to receive problem sheets from first-level support.
4. Enter the details of the problems into the problem log, using for guidance the problem log notes for completion.
5. Pass problem sheets to second-level support. How you do this will depend on your local arrangements such as whether second-level support is full time or part time and whether based on site or off site.
6. Receive (or chase) resolution details of problems from second-level support, who should return the completed problem sheet to you.
7. Update the problem log with closure details, using for guidance the problem log notes for completion.
8. File the problem sheet in the lever-arch file you made for this in task 2 above.

6. Update asset log and licence list

Outcomes

Once you have fully completed this task, you will have:

- **An accurate asset log, which can be used for:**
  - **Planning changes**
  - **Financial reporting**
  - **Specifying maintenance contracts**
  - **Contributing to the service catalogue**
  - **Locating equipment**
  - **Tracking the movement of equipment**
  - **Identifying losses**
- **An accurate licence list, which can be used for:**
  - **Proving legal compliance with software licensing laws**
  - **Tracking licence allocation**
  - **Ensuring that all licences already purchased are used before incurring further costs.**

Introduction to task

The asset log is a list of all ICT equipment in the school and the licence list documents all software licences, whether available or allocated. These logs are created initially through an audit carried out by whoever is responsible for the maintenance function. Once the school has the baseline documented, however, it is the single point of contact who keeps them up to date.

The mechanism for doing this is mainly the request for change form, which is filled in for every change. Requests for change are approved by the ICT owner, in two steps: approval to proceed with a change (to incur costs and make plans) and approval to implement a change (to approve plans and scheduling).

A final step requires the implementer of the change to indicate the outcome, including details of any changes to asset details.

Change implementers may be:

- Second-level support (for resolving problems)
- Implementation (for implementing new requirements initiated by the design function)
- Maintenance (for maintenance requirements).

The form is then passed to the single point of contact and the information in step 3 is used to update the asset log.

You will need

From the toolkit CD (Primary FITS tools\Configuration Management\)

- **Asset log notes for completion**
- **Licence list notes for completion**

From maintenance

- **Baseline asset log**
- **Baseline licence list**

From change implementers

- **Approved requests for change with step 3 completed**

From second-level support

- **Completed install build checklists**

Function single point of contact

In some cases, licence allocation or update may happen as a result of problem resolution by second-level support. In such cases a request for change may not be completed, but licence information is recorded in the install build checklist instead. These checklists are passed to the single point of contact for filing and you should check them for licence list updates.

Instructions for updating asset log and licence list

1. Download the documents you need from the toolkit CD (or use the local copy you created in task 2):
   - *Primary FITS tools\Configuration Management\Asset log notes for completion.doc*
   - *Primary FITS tools\Configuration Management\Licence list notes for completion.doc*
2. Get the baseline asset log and licence list from maintenance and file them electronically:
   - *Primary FITS records\Asset log*
   - *Primary FITS records\Licence list*
3. Wait to receive approved requests for change with step 3 completed.
4. Update the asset log and/or the licence list with the information in the request for change, step 3. For guidance use the asset log and licence list notes for completion.
5. Wait to receive completed install build checklists.
6. Update the licence list with licence allocation information from the install build checklist. Tick the final check box on the install build checklist to indicate that you have updated the licence list (or enter 'N/A' if that does not apply).

Tip

Try to update the asset log and licence list as soon as you receive changes, so that they are always accurate.

7. Create service report

Outcomes

Once you have fully completed this task, you will have:

- **Supplied the ICT owner with regular ICT service performance information**
- **Created a historical record of ICT performance for monitoring trends**
- **Gained insight into the facts supporting the statistics (useful at service review meetings).**

Introduction to task

The service report is used by the ICT owner to identify items for discussion at monthly review meetings with Primary FITS participants. Meetings will be set up by the ICT owner as part of the implementation of Primary FITS and dates will be agreed with the team.

The service report provides some basic information about ICT service performance during the month in question:

- Number of incidents and problems logged
- Average time to resolution of incidents and problems resolved
- Number of outstanding incidents and problems at the end of the month
- Number of new installations
- Number of changes
- The amount of server disk space used and how much remains available at the end of the month.

You will need

From the toolkit CD (Primary FITS tools\Service Level Management\)

- **Service report template**
- **Service report notes for completion**
- **Service report example**

The single point of contact prepares service reports – mostly by using information from records such as incident sheets, problem sheets and requests for change.

Instructions for creating service report

1. Download the documents you need from the toolkit CD (or use the local copy you created in task 2):
   - *Primary FITS tools\Service Level Management\Service report template.xls*
   - *Primary FITS tools\Service Level Management\Service report notes for completion.doc*
   - *Primary FITS tools\Service Level Management\Service report example.xls*
2. Copy the service report template to the service reports folder you created in task 2:
   - *Primary FITS records\Service reports\Service report template.xls*
3. Talk to the ICT owner and agree how far ahead of each meeting you should prepare the service report.
4. Using the service report template, create a new service report.
5. Using for guidance the service report notes for completion, prepare the service report.
6. Issue the service report to the ICT owner.
7. File the service report electronically (Primary FITS records\Service reports\).

Tip

The service report template has columns for four months. At the end of four months you will need to create a new file from the template.

8. File records and software

Outcomes

Once you have fully completed this task, you will have:

- **Source material for monthly service reports**
- **Useful information on incident and problem resolution to refer to**
- **Details of changes made**
- **Historical information for trend analysis**
- **Central control of procedures**
- **Central control of software.**

Introduction to task

Store records and software carefully and keep them centrally for ease of access by everyone involved. For example, records will need to be reviewed each month during the preparation of the service report (see task 8 above) and software may need to be accessed by more than one person.

The single point of contact is responsible for maintaining a central repository for records and software. The filing system you created in task 2 facilitates this.

Some records and software are suitable for lectronic filing in the Primary FITS records folder structure created in task 2:

- Service reports
- Asset log
- Licence list
- Build procedures
- Risk assessments
- Contingency plans
- Network diagrams
- Support procedures
- Application and operating-system backups.

Others, that may have handwritten entries, should be kept as hard copy in the lever-arch (or similar) files you created in task 2:

- Incident sheets
- Problem sheets
- Requests for change
- Install build checklists.

Catalogue all original software media in media storage boxes and keep licensed working copies of software on the file server.

You will need

- **The lever-arch files (or similar) created in task 2**
- **Access to electronic folder structure created in task 2 (Primary FITS tools\)**
- **The media storage boxes prepared in task 2**
- **Completed records**
  - **Incident sheets**
  - **Problem sheets**
  - **Requests for change**
  - **Service reports**
  - **Asset log**
  - **Licence list**
  - **Build procedures**
  - **Install build checklists**
  - **Risk assessments**
  - **Contingency plans**
  - **Network diagrams**
  - **Support procedures**
- **Original software media**
- **Licensed backup copies of software**

Instructions for filing records and software

1. Wait for completed records to be submitted for filing.
2. File completed records in the appropriate electronic folder or lever-arch file.
3. Wait for original software media and licensed backup copies to be submitted for filing.
4. File original media in media storage boxes and licensed backup copies in the appropriate electronic folder.

Tip

For the hard-copy folders, use dividers to file records by month. This will help you create the service report in task 8.

First-level support	• Is the first to respond to user incidents and requests • Restores functionality as quickly as possible **Skills required** • Knowledge of all ICT services in the school and their users • Ability to implement short-term solutions – equipment-swap, printer redirect, toner change and so on
Who?	**A teaching assistant**

Important!

- The person assigned to this function must be someone who can be available at the school to attend to user incidents promptly.
- Do not delegate this function to the person also assigned to the second-level support function.

Summary of tasks		
Start-up or occasional tasks	**Regular tasks**	**Frequency**
	Resolve ICT user incidents logged by the single point of contact.	As required
	Create problem sheets for use by second-level support in following up incidents.	As required