Self Service

Level I

Participant Guide

For Reference Only 10/28/2005



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Any questions or comments about this document can be directed to the Training Department, Enterprise Managed Services, Houston Enterprise Service Center, Getronics.

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Course Description

Purpose

The purpose of this course is to introduce the Self-service Application to the end users and the ESC Analysts. This document will cover the basic features and functionality of the Self Service application.

The Self Service application was designed around the concept of emulating a customer's call to the help desk. It is personal, and will allow the end user access to their information only, ensuring that the system is properly secured and that the customer's data is kept private.

Audience

All persons who may employ this material in the normal execution of duties.

Prerequisites

Basic knowledge of Vantive and Internet browsers.

Your Role as a Participant

Participants will be required to do practice exercises and review questions in each section.

How to Use This Document

This Document serves the user as a reference guide during the training session. The Documentation is provided to the user to follow through the procedures during the class room training.

Performance Testing Requirements

Expectations

Participants will be required to do practice exercises and review questions in each section.

File and Application Information

Exercise Files

No exercise files.

Supporting Files

No supporting files.

Applications Used

Internet Explorer or IE 6.0 compatible web browser.

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Section 1. Self Service Strategy

Objectives

Upon completion of this section, you will be able to:

- Understand concepts of Self Service
- > Use this service as end user's on-line access into the call center.
- Access into their existing problem information instantly.
- Create a new problem that will be automatically dispatched to the help desk for resolution.

Introduction

In the age of the Internet, more and more customers are demanding on-line access to replace the traditional phone call to a help desk. They often want to initiate a ticket, view the status of an existing issue, access an online knowledge base for self resolution of their problem, or even create a request for products and/or services.

This requirement in the marketplace has resulted in Getronics developing a web application that interfaces to the Vantive Help Desk, and the Web Advisor knowledge base.

That product is called Self Service. It is an end user's on-line access into the call center. It will provide them instant access into their existing problem information, as well as allow them to create a new problem that will be automatically dispatched to the help desk for resolution. This product offers 24 hour availability, and there is no queue in which a customer might have to wait.

The Self Service application was designed around the concept of emulating a customer's call to the help desk. It is personal, and will allow the end user access to their information only, ensuring that the system is properly secured and that the customer's data is kept private

Self-Service is a web-based application that allows for the user community to submit tickets to the Helpdesk and review open requests or problem reports. The Self-Service application works with Vantive and the Knowledge Base. There are three modules within Self-Service for the user community to access: Core Ticket Management, Knowledge Base, and Request Management.

Core Ticket Management allows for users' to submit, review and close existing problems and requests tickets. The user can also update the ticket.

The Knowledge Base allows users to view an online knowledge base of common problems with resolutions such as Microsoft Outlook or Windows 2000. The users can search for known issues and attempt to resolve the problems themselves. If they are unable to resolve the problem or require assistance, they are able to escalate the issue to the Helpdesk for assistance. If they are able to resolve the problem themselves, they are able to resolve the ticket. The ticket will be logged with the Helpdesk for tracking.

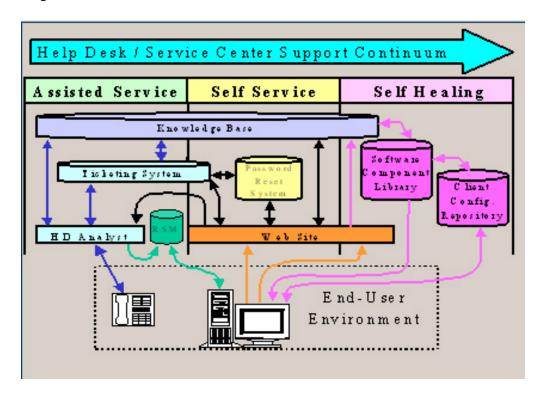
Request Management allows for end users to access a catalog of products and services and submit requests for the products/services. The request will be sent to a manager for approval. If approved, tickets will be generated automatically to the appropriate group. Additional software, new hardware and additional access are some of the items available in the catalog.

e-Service Strategy

Getronics e-Service strategy is to bring enhanced value to our customers by helping to improve end user productivity. This is accomplished by driving less complicated end user questions to self service.

Examples:

- COTS Problems and Usage
- Move, Add, Change Requests
- Ticket Status
- Outage Notification



Allowing analyst to focus on complex end user technical questions.

Examples:

- Customer's Networked Environment
- Custom Applications
- Business Systems

The picture represents the home page of the Self Service application. The top of the page is the main menu, which always appears in the application. The home page contains a brief summary of the site, with the ability to drill down on the underlined words for more detail. The page also contains a view of the user profile as it appears in Vantive, as well as the list of current outages.



The Complete Support Solution

Home | Solve Problem | Create Ticket | Open Tickets | Closed Tickets | Outages | Change Profile | Logoff |

Welcome To Self Service

The complete web interface for ICT support.

This system was designed to provide you real time access to the problem and request management systems used at the help desk. Through this site, you can <u>Create a Ticket</u>, review your <u>Open Issues</u> and <u>Closed Issues</u>, <u>Add Notes</u> to an existing ticket, and review the status of current <u>Outages</u>. You may also request a <u>Change Your Profile</u> as it appears in the help desk system.

In addition, the system is integrated with the help desk knowledge base, enabling you to <u>Solve your own Problem</u>. The knowledge base contains a <u>Top 10 list</u> of common problems, a step-by-step <u>Troubleshooter</u>, and the ability to perform a text <u>Search</u> on solutions contained within. When in the knowledge base, you can indicate that the solutions <u>Solved</u> your problem, or choose to <u>Escalate</u> to the help desk and await contact by an analyst.

Your Profile

Change Your Profile

First Name: Allen
Last Name: Thomas

Email: allen.thomas@getronics.com

User ID: AThomas

Phone: - - -

Site: Home Office User

Depart

Current Outages

All Current Outages
No Current Outages

Before You Begin Exercise A

A User ID and password are required to access the system. Self Service user IDs that are the same as the employees' network logon IDs.

The User ID is linked to the requestor's Client User record in the Vantive system to ensure that when requestors log into the Self Service system, they are provided access to the system in accordance to their permission level.

There are several Clients that use Self Service applications. The Instructor should provide the client specific Self Service Home page URL and UserID and Password information to the students to Login to client specific Self Service site.

Exercise A. Title

Action... Comments...

1. Enter the following URL provided by the instructor.

Welcome To Self Service

The complete web interface for ICT support.

Now there is a new way to interact with the Help Desk. This product has been designed to allow you, the help desk customer, to perform many of the functions over the web that would have required a phone call to the help desk.

Creating tickets, checking status of tickets and viewing current outage information are just a few of the capabilities of this system.

Just enter your Self Service Login and Password and you will be logged into the system. If you do not have an ID, you may auto-register at which point you will be provided a Login and Password.

Please Log In

Both entries are Case Sensitive.
User ID:
Password:

Submit Reset

Click Here to Register.

This site is best viewed at 1024 X 768. It is intended to work with Internet Explorer 4.01 Service Pack 2 or later.

2. Enter User ID—

Please use the proper case for the ID and password. The proper method to enter the user ID is *Last*, *First*.

- **3.** Enter Password—
- 4. Click on the Submit Button

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Auto-Registration

Users can register for an account by completing an on-line registration form. If the user's registration information matches their Vantive Client User Record, a Web user id and password will be generated and automatically displayed to the user. If the user's registration information does not match, a ticket will automatically be created and assigned to the Help Desk.

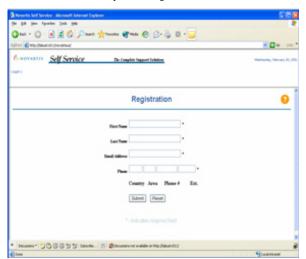
Exercise B. Auto-Registration

Action...

- **1.** Click on the "click here to register Hyperlink
- 2. Enter First Name
- 3. Enter Last Name
- 4. Enter Email address
- 5. Enter **Phone number** information
- **6.** Click on the submit button

Comments...

Enter the information required to register



The request will be sent to the designated Vantive inbox to be processed.

Section 2. Core Ticket Management

Objectives

Upon completion of this section, you will be able to:

- > Create a New problem ticket
- > Review the tickets in different statuses
- ➤ Handle the open status tickets
- ➤ Change or update the existing user profile
- > Check the outages

Introduction

The Core Ticket Management module is an end-user's 24 hour a day on-line access to the Vantive problem/request management tool. This module allows users to view the current system outages, submit problems for themselves or others, review their existing problem/request tickets, as well as add updates to those tickets. The core ticket management module allows the requestor to manage the ticket once it has entered the Vantive system.

The Core Ticket Management module is the foundation of the product. It can be implemented stand alone, with the knowledge base, with the request management module, or with both.

Features of the Core Ticket Management Module

Feature	Function
Login and Password	The system requires that an end user have a login and password. The logins and passwords are maintained by the help desk analysts and communicated to the end user. The login ID is linked to the end user's Client User record in the Vantive system. This link ensures that when the end user logs into the Self Service system, they are only provided access to their own information.
Auto Registration	Users can auto-register for a login and password by completing an online form available at the site login page. The system will validate their information against their Client User record in Vantive and provide a login and password when registering.
User Profile	The end user has access to their profile, as it appears in Vantive. They can request a change to the profile, which will assign a ticket to the help desk to update the end user's profile.
Password Change	End users can change their password to the site from within the Self Service application.
Reviewing Current Outages	The end user has the option of viewing the current outages in the IT environment. This information is pulled from the Active Whiteboard Records in the Vantive system. The user can indicate that their problem is related to the outage, and a ticket will be generated against that Whiteboard.
Creating Tickets	The Self Service application provides the end user with the option to create a new problem report in the Vantive system. The user will be prompted to add a quick symptom and a full description of their problem. The ticket will then be assigned to the help desk for response and resolution. The system also allows the user to create the ticket in another user's name. This will allow them to turn in a ticket for their boss, or coworker. In addition, the system can be setup to allow the end user to indicate that the problem is a multi user issue. In that case, the ticket that is created will be assigned a high priority.
Adding Notes to Tickets	The user can view all supporting notes on tickets. They can also add their own note to the ticket. Upon entering a note, the system alerts the group to which the ticket is assigned, or the help desk.
Reviewing Open Tickets	The user can review all open tickets that they have created, or that have been created in their name. This list shows them the basic elements of the ticket, and allows them to review the ticket in detail by selecting the ticket number.

Feature	Function
Reviewing Closed Tickets	The user can review the closed tickets that they have created, or that have been created in their name. This list shows them the basic elements of the ticket, and allows them to review the ticket in detail by clicking on the ticket number.
Site and Page Help	The site has a home page that the user is first taken to. This page contains a high level overview of the site, as well as a view of the user's profile and a summary of the system outages. In addition, each page in the application has topical help that will assist the user with completing the information on the page that they are on.
Customized Visual Schemes	The system can be customized on a program-by-program basis from an aesthetics point of view. The customer's logo and color schema can be added to the system. This customization will provide the customer's own look and feel to the web pages.
Create Ticket	Choosing Create Ticket at the Main Menu will take you to the form shown in the opposite box. Self Service The Complete Support Solution Open Tickets Closed Tickets Outages Change Profile Logoff
Open Tickets	The Open Tickets menu option brings the user to the Open Tickets page. Here the user can view his/her open tickets or those tickets he/she has created on behalf of another person. From this page the user can also choose to review the details of the ticket, add a note to the ticket, or indicate that the issue has been resolved Self Service The Complete Support Solution Closed Tickets Outages Change Profile Logoff
Notes	The user can view all supporting notes on tickets. They can also add their own note to the ticket. Upon entering a note, the system alerts the group to which the ticket is assigned, or the help desk.
Closed Tickets	The Closed Tickets Menu Option allows the user to view a maximum of 50 closed tickets. These may be his/her last 50 closed tickets, the last 50 closed tickets he/she created for others, or some combination of the two.

Function Feature Outages The Outages page provides status on system outages that have occurred in the IT infrastructure that may affect the end user population. This information is pulled from the Active Whiteboard Records in the Vantive system. From this page a user can view the details of the outage, or log a related ticket. Self Service The Complete Support Solution Change Profile | Logoff | Home | Solve Problem | Create Ticket | Open Tickets | Closed Tickets **Current System Outages Screen Current System Outages Change Profile** The Change Profile option allows the user to submit changes to their user profile. Changes can be made to the user's name, email, user ID, phone number, site, and/or department. Passwords can also be voluntarily changed using this form. Once the form is completed, a ticket is automatically created and assigned to the Help Desk inbox. The Help Desk analyst then updates the user profile in the Vantive system. Self Service The Complete Support Solution Help Each page in the application has topical help that will assist the user with completing the information on the page that they are on. Help is accessed by clicking on the question mark icon on the right side of the screen. **Current System Outages** rent Outages - All times shown are Central t

Before You Begin Exercise A

Logon to the Self service Application by using the ID and password provided by the instructor

Exercise A. Create a New Ticket

Action...

- 1. Select Create Ticket option from the main menu.
- 2. Enter the problem type in the **Subject** Field
- **3.** Enter the detailed problem description in the Description field

Comments...



If the problem involves multiple users, click on the *Multiple User Issue* check box. When all entries are complete, click on the *Submit* button.

If you are creating this ticket behalf of another user

- **4.** Click on the Change user name button
- 5. Select the user from the search results list.
- **6.** To search for the user record
- 7. Enter the user's Last name in the last name search field
- **8.** Select the user from the search results list by selecting the radio button next to the user record
- 9. Click on Use selected record button

If this is Multi User problem

- **10. Check** the **Multi User Issue** check box given in the Create a problem Ticket form.
- **11.** To complete the ticket **Click** on **Submit** Button



■ Multiple User Issue

Note: This will be created as a high priority ticket and will be sent to designated Vantive inbox

Before You Begin Exercise B

The Open Tickets menu option brings the user to the Open Tickets page. Here the user can view his/her open tickets or those tickets he/she has created on behalf of another person. From this page the user can also choose to review the details of the ticket, add a note to the ticket, or indicate that the issue has been resolved.

Exercise B. Open Tickets

Action... Comments...

To view the open tickets user had created

1. Click on the **Open Tickets** menu option from the main menu

It brings the user to the **Open Tickets** page



To view a open ticket in detail

2. Click on the **ticket number** to view or update



Here the user can view his/her open tickets or those tickets he/she has created on behalf of another person. Once the ticket is open, the user can choose to **review** the details of the ticket.

3. Click on the Review Request hyperlink to review request status

If user need to add any extra comments or special instructions here user can add a notes to the ticket. If the problem no longer exists, user can indicate that the issue has been resolved

Before You Begin Exercise C

The Change Profile option allows the user to submit changes to their user profile. Changes can be made to the user's name, email, user ID, phone number, site, and/or department. Passwords can also be voluntarily changed using this form. Once the form is completed, a ticket is automatically created and assigned to the Help Desk inbox. The Help Desk analyst then updates the user profile in the Vantive system.

To update user profile or change existing profile:

Exercise C. Change Profile

Action	Comments
1. Click on the Change profile menu option form the main menu	Enter the information needed to be updated
2. Click on save button after enter the information	A Vantive ticket will be created. This ticket will be assigned to designated inbox in Vantive. The Helpdesk analyst will update the user data record in the Vantive system.

Change Profile



Section 3. Knowledge Base

Objectives

Upon completion of this section, you will be able to:

- > Explore the Knowledgebase
- ➤ Use the knowledge base module to troubleshoot specific issues

Introduction

The Knowledge Base module allows end users access to an online knowledge base that contains common information such as Microsoft and Lotus application and operating system information. In addition, the knowledge base is setup with customer specific information such as solutions to problems with proprietary customer applications.

This knowledge base is developed and maintained by the Help Desk and the Knowledge Management team. The help desk analysts use the same knowledge base to support the customer when they phone in to the service center

Knowledge Base Features and Functions

Feature	Function
Top Ten Problems	When first entering the knowledge base, the end user will see a list of the Top ten occurring problems in their environment. This provides quick access to highest volume or issues that the customer experiences. The help desk and the knowledge team maintain this list.
Troubleshooter	The system also provides the user with a troubleshooter, or a wizard. This allows the user to answer various questions to filter the knowledge and provide the closest set of resolutions to their problem. As they answer each question, they are prompted with another until the system has been able to best identify their problem.
Text Search	The system also provides a full text search engine for the knowledge base. The user simply enters a phrase describing their problem and the system returns the resolutions that most closely match their text entry.
Solving Problems via the Knowledge Base	Users can indicate whether their issue was resolved by a solution in the Knowledge Base. The system will create a closed Vantive ticket, which will include the solution used.
Escalating Problems	Users can escalate issues in situations where the Knowledge Base will not resolve their issue. The system will create a Vantive ticket, which will include the Knowledge Base session and will be assigned to the help desk inbox for resolution.
Analysts Access to User Knowledge Base Session	All Vantive tickets that are created through the Knowledge Base will have a link to the Knowledge Base session. By clicking a button in the Vantive client, an analyst will be able to review the user's Knowledge Base session. This helps when the analyst calls back the user, as they know what the user has already tried in an attempt to solve their problem.

Before You Begin Exercise A

Users will login to Self-Service using their registered login.

Users will click the Solve Problem tab Users will be in the Self-Service Knowledge Base. Users will have three options to search for solutions to problems using the Knowledge Library, Searches, or Top Ten Lists.

The Knowledge Library allows you to choose from categories to narrow down solutions. To start using Knowledgebase:

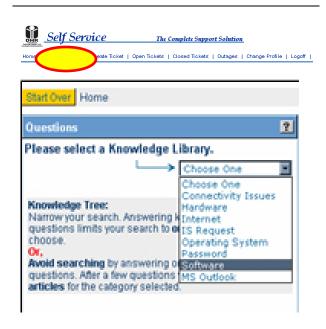
Exercise A. Using the Knowledge Base to Solve or Escalate Problems

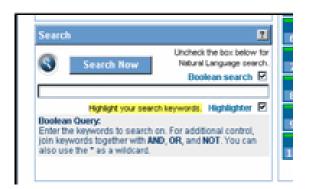
Action...

- **1.** Click on Solve problem option from the main menu
- 2. Select the problem area from the Choose one pull down list

- **3.** Once you select the problem category click on the search button
- **4.** Enter a keyword or a wildcard character

Comments...





The Search option allows you to use Boolean or Natural language to search for keywords or phrases such as Outlook 97 or Profiles.

The Top Ten Lists provide the Top Ten issues that have been documented in the Vantive problem tracking system, your top ten searches and the top ten searches of Self-Service.



To use the Top 10 option:

- **5.** Choose one of the problem symptoms listed in the Top 10 list
- **6.** Follow the Steps to troubleshoot the problem.

When the user locates the solution to their problem, they will have three options, solved, escalate or start over, located at the bottom of the screen.



For solved and escalate, a ticket will be generated for the user. It will include the Knowledge Base article number and a brief description. If solved is selected, the ticket will be resolved. The user will be provided the ticket number. If escalate is selected, the ticket will be assigned to the Houston Helpdesk for resolution. The ticket will be placed in the contract specific designated Service Desk Vantive inbox.

Note: The Helpdesk is responsible for contacting that user to continue troubleshooting the problem and resolving or assigning it to the appropriate solver team. The Vantive TAD's will be altered to reflect the actual problem.

For Reference Only

Glossary

Section 4. Glossary and Acronyms

Glossary

Term/Acronym	Definition
Login and Password	The system requires that an end user have a login and password. The logins and passwords are maintained by the help desk analysts and communicated to the end user. The login ID is linked to the end user's Client User record in the Vantive system. This link ensures that when the end user logs into the Self Service system, they are only provided access to their own information.
Auto Registration	Users can auto-register for a login and password by completing an online form available at the site login page. The system will validate their information against their Client User record in Vantive and provide a login and password when registering.
User Profile	The end user has access to their profile, as it appears in Vantive. They can request a change to the profile, which will assign a ticket to the help desk to update the end user's profile.
Password Change	End users can change their password to the site from within the Self Service application.
Reviewing Current Outages	The end user has the option of viewing the current outages in the IT environment. This information is pulled from the Active Whiteboard Records in the Vantive system. The user can indicate that their problem is related to the outage, and a ticket will be generated against that Whiteboard.
Creating Tickets	The Self Service application provides the end user with the option to create a new problem report in the Vantive system. The user will be prompted to add a quick symptom and a full description of their problem. The ticket will then be assigned to the help desk for response and resolution. The system also allows the user to create the ticket in another user's name. This will allow them to turn in a ticket for their boss, or co-worker. In addition, the system can be setup to allow the end user to indicate that the problem is a multi user issue. In that case, the ticket that is created will be assigned a high priority.

Glossary ____ For Reference Only

Adding Notes to Tickets	The user can view all supporting notes on tickets. They can also add their own note to the ticket. Upon entering a note, the system alerts the group to which the ticket is assigned, or the help desk.
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	maximum of 50 closed tickets. These may be his/her last 50 closed tickets, the last 50 closed tickets he/she created for others, or some combination of the two.
Outages	The Outages page provides status on system outages that have occurred in the IT infrastructure that may affect the end user population. This information is pulled from the Active Whiteboard Records in the Vantive system. From this page a user can view the details of the outage, or log a related ticket.
Current System Outages Screen	Correct Courages All Stones Observed (Deer States) (Deer S
Change Profile	The Change Profile option allows the user to submit changes to their user profile. Changes can be made to the user's name, email, user ID, phone number, site, and/or department. Passwords can also be voluntarily changed using this form. Once the form is completed, a ticket is automatically created and assigned to the Help Desk inbox. The Help Desk analyst then updates the user profile in the Vantive system.
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Text Search	The system also provides a full text search engine for the

Glossary For Reference Only

	their problem and the system returns the resolutions that most closely match their text entry.
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Analysts Access to User Knowledge Base Session	All Vantive tickets that are created through the Knowledge Base will have a link to the Knowledge Base session. By clicking a button in the Vantive client, an analyst will be able to review the user's Knowledge Base session. This helps when the analyst calls back the user, as they know what the user has already tried in an attempt to solve their problem.

For Reference Only

References

Section 5. References

This section is a compilation of reference materials that would help the learner study outside the training session.

• The State of Georgia Self Service Web Interface

Reference Only