



LOGGING A CALL ON THE HELPDESK SYSTEM PROCEDURE

<u>System:</u> Quality Management System	<u>Reference No, Revision No:</u> Q-F-IT-P-29, Rev 1	<u>Originated by:</u> Systems Administrator
<u>Revision Date:</u> 16.01.2014	<u>Page No:</u> Page 1 of 7	<u>Authorised by:</u> IT Manager

1 Purpose

This procedure covers the logging a new IT call by users on the CRM Helpdesk system.

2 Scope

Providing clear steps on how to log a new IT call by users on the CRM Helpdesk System, assign the call to an IT Technician, update the call and be closed by the IT Technician.

3 References

N/A

4 Definitions

N/A

5 Responsibilities

Systems Operator – the business systems operator is the one responsible for receiving the IT call either by phone or email, logging and assigning it to an IT Technician on the Helpdesk system.

Systems Administrator – in the absence of the business systems operator the systems administrator is the one responsible for logging and assigning it to an IT Technician on the Helpdesk system.

6 Procedure

6.1 Conducted every time a user has an IT related problem on his/her workstation in order to be assisted by an IT Technician.

An e-mail is sent to the IT Technician him /her on the details of the call to be attended, including the user who need assistance and the type of need.

6.2 This procedure is completed successfully when:

A user IT related problem has been successfully resolved or completed.

6.3 Login as yourself into the CRM Helpdesk system using internet explorer. The URL is:

<http://crm.sec.co.sz/crm/eware.dll/go>

LOGGING A CALL ON THE HELPDESK SYSTEM PROCEDURE



System:
Quality Management System

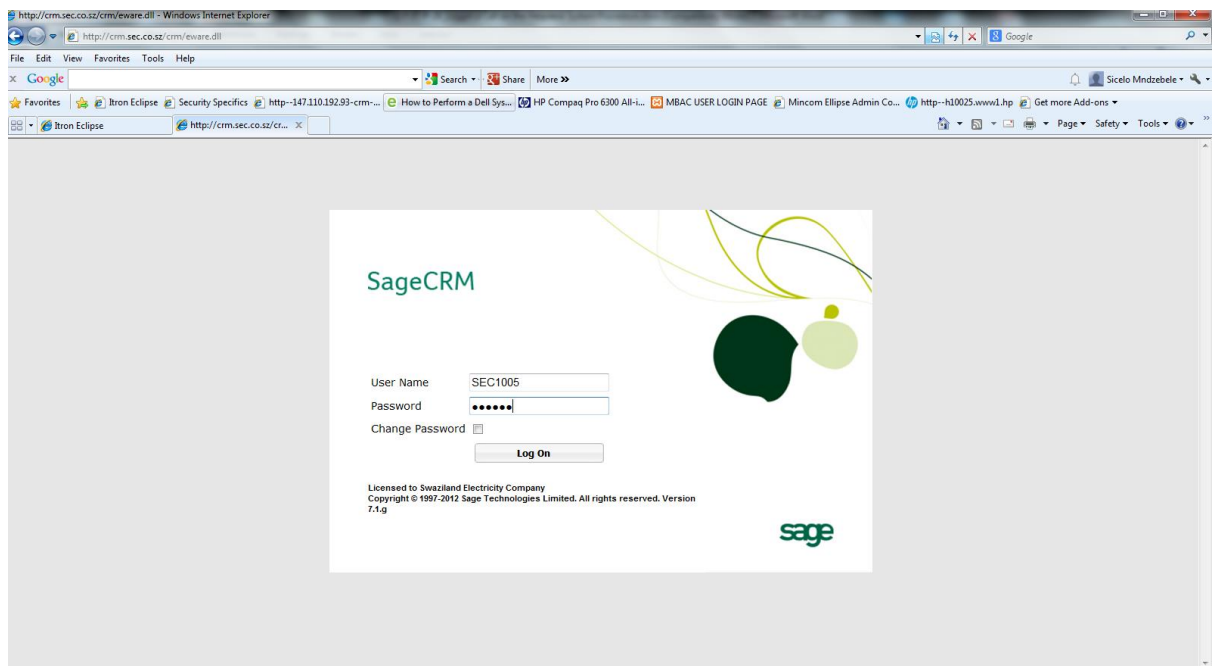
Reference No. Revision No:
Q-F-IT-P-29, Rev 1

Originated by:
Systems Administrator

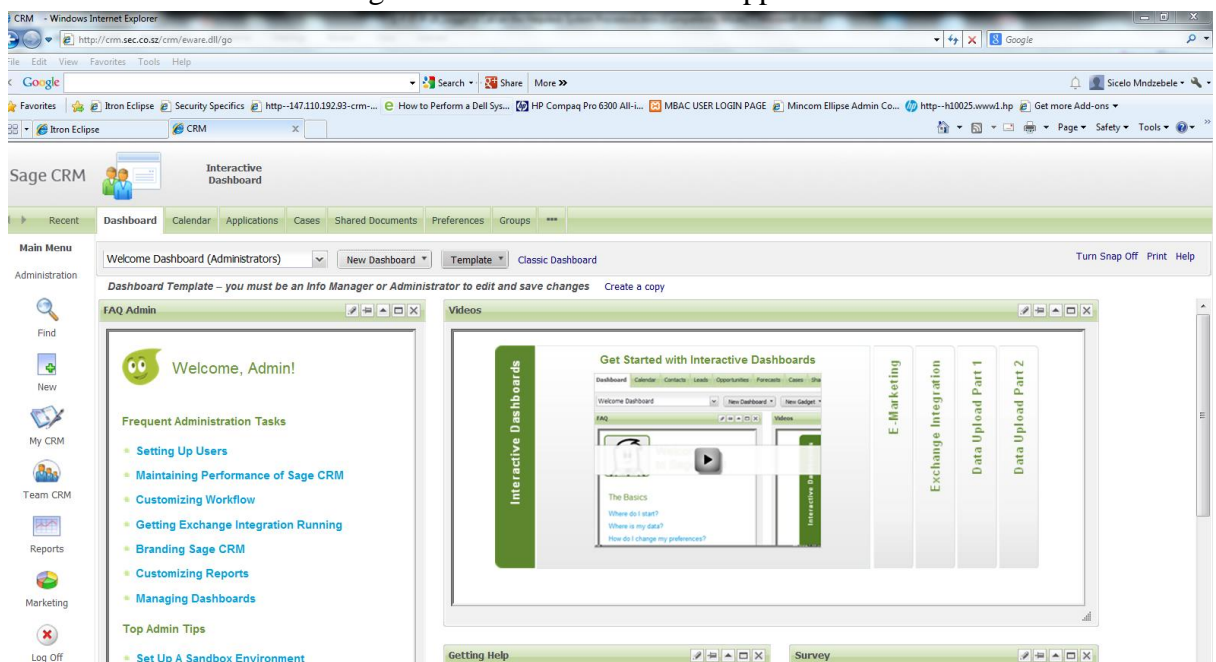
Revision Date:
16.01.2014

Page No:
Page 2 of 7


Authorised by:
IT Manager

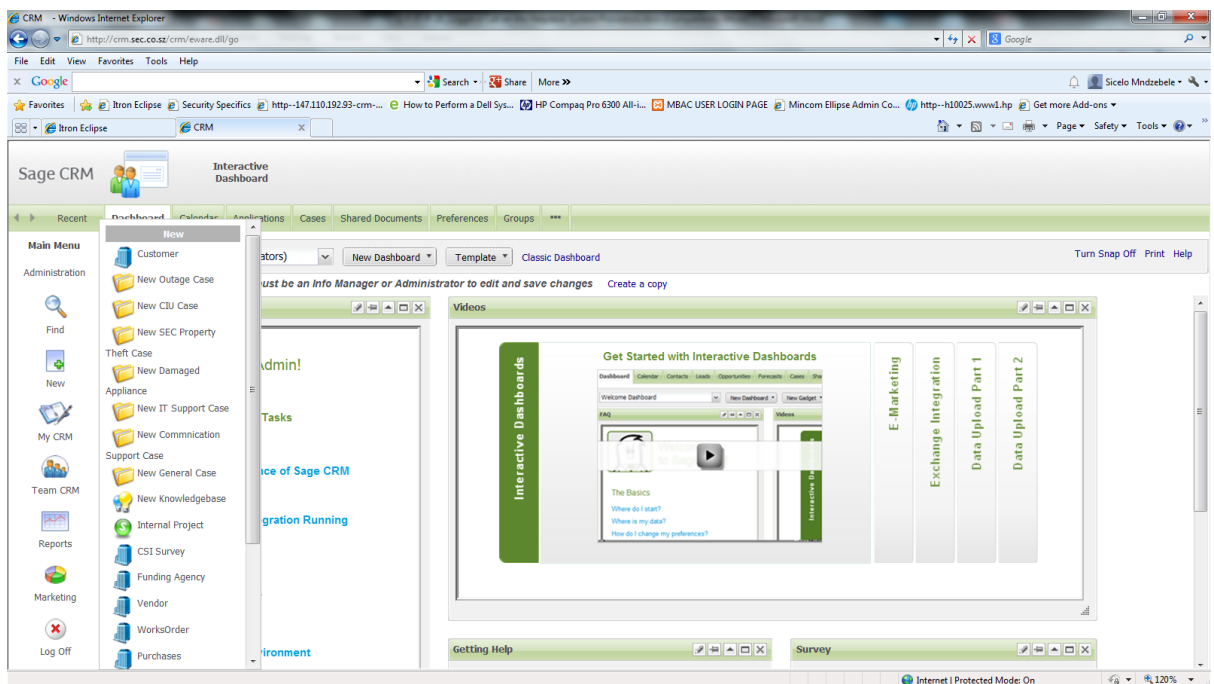


6.4 Press Enter or Click Login and a menu screen will appear

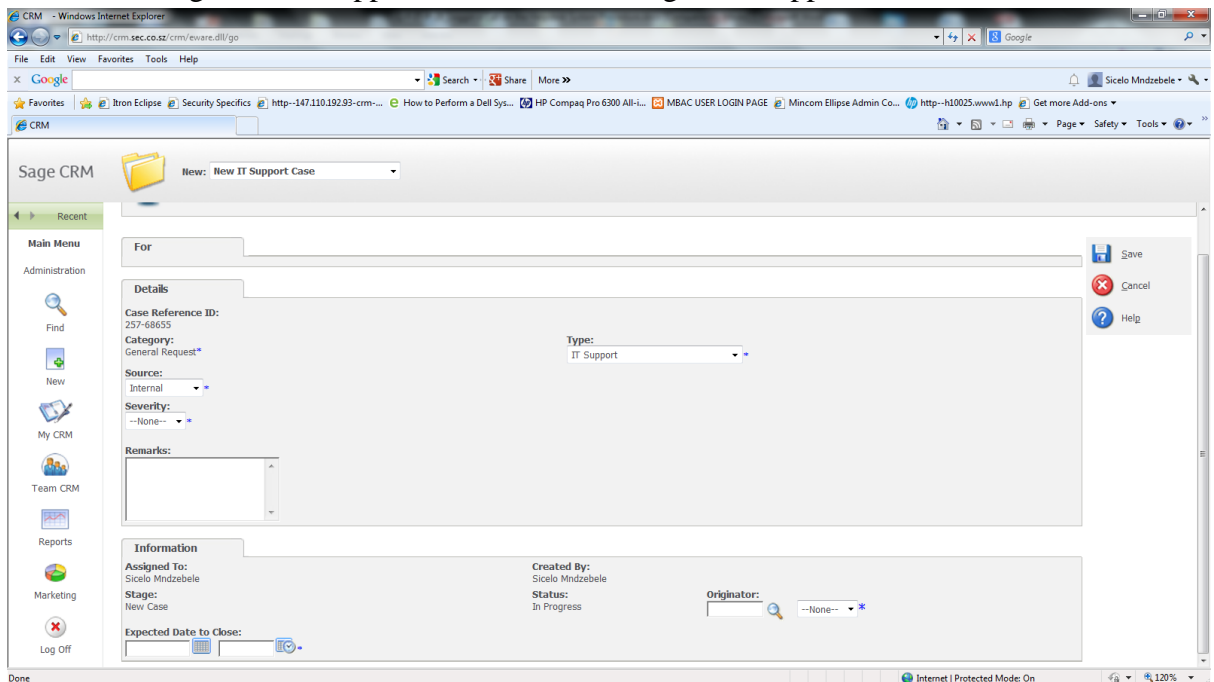


6.5 Right click on the Menu and select New IT Support Case


LOGGING A CALL ON THE HELPDESK SYSTEM PROCEDURE		
System: Quality Management System	Reference No, Revision No: Q-F-IT-P-29, Rev 1	Originated by: Systems Administrator
Revision Date: 16.01.2014	Page No: Page 3 of 7	Authorised by: IT Manager

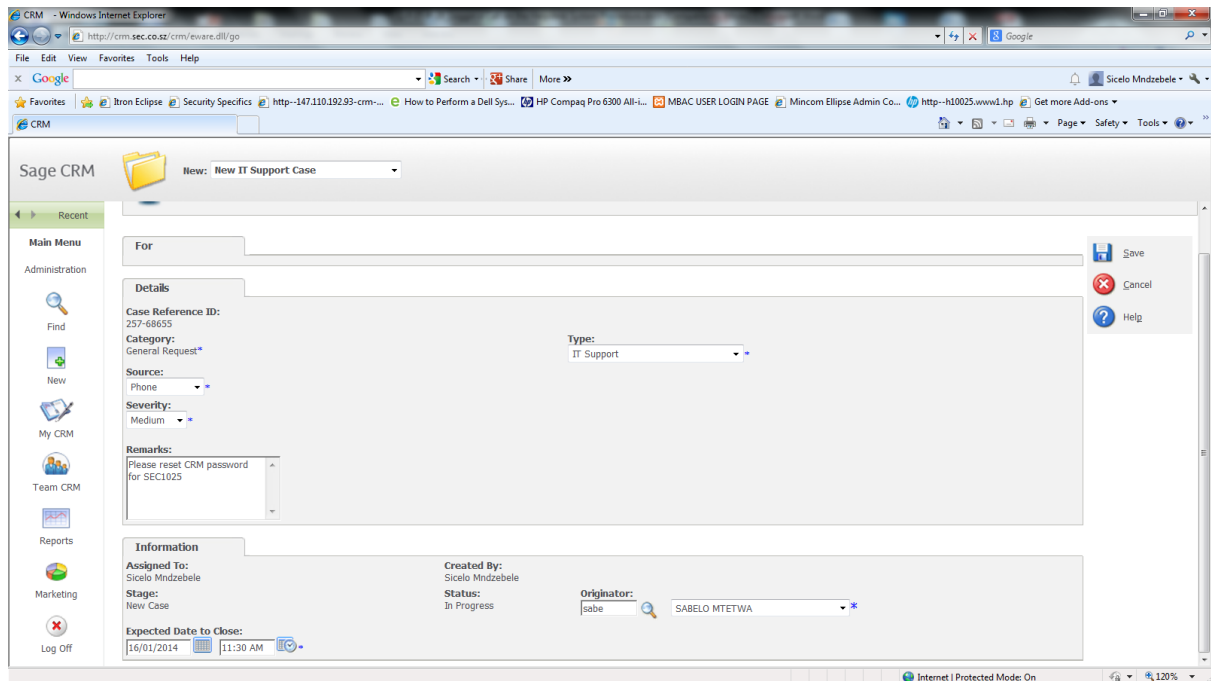


6.6 On clicking New IT Support Case, the following screen appears:



6.7 Enter the Source, Severity, Originator and Expected Date to close the call details and press the **Save** button.

LOGGING A CALL ON THE HELPDESK SYSTEM PROCEDURE			
System: Quality Management System	Reference No. Revision No: Q-F-IT-P-29, Rev 1	Originated by: Systems Administrator	
Revision Date: 16.01.2014	Page No: Page 4 of 7	Authorised by: IT Manager	



Sage CRM - Windows Internet Explorer

http://crm.sec.co.sz/crm/eware.dll/go

For: New IT Support Case

Details

Case Reference ID: 257-68655

Category: General Request

Type: IT Support

Source: Phone

Severity: Medium

Remarks: Please reset CRM password for SEC1025

Information

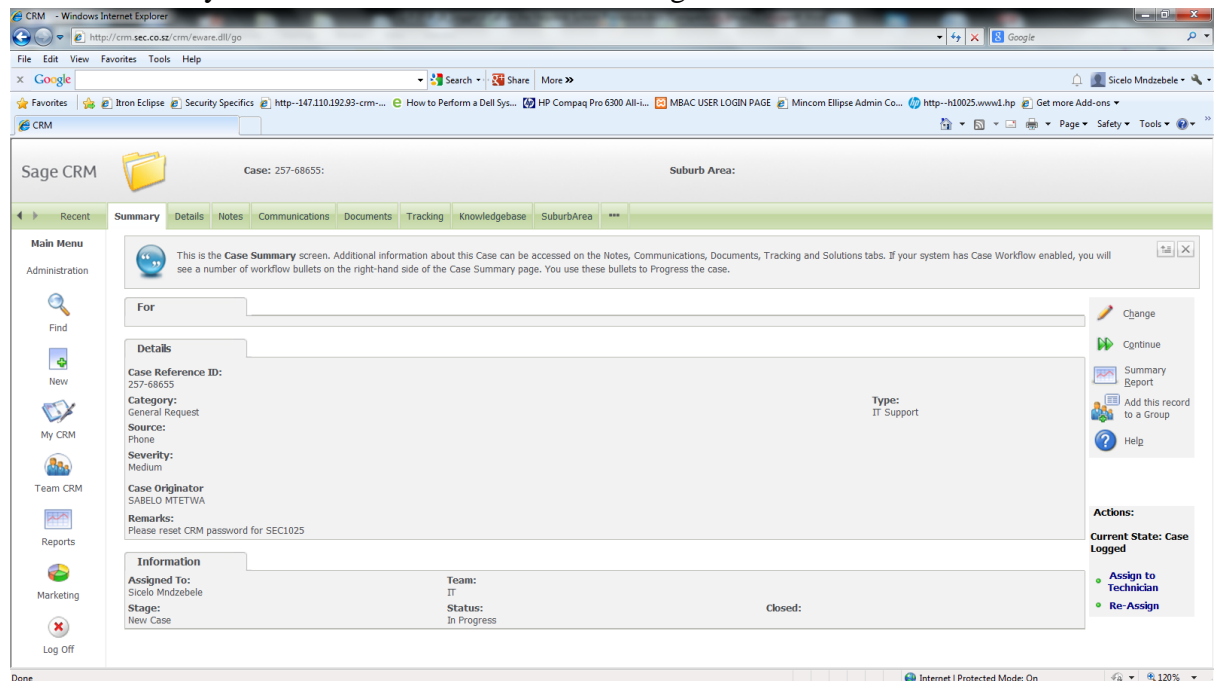
Assigned To: Sicelo Mndzebele

Status: In Progress

Originator: SABELO MTETWA

Expected Date to Close: 16/01/2014 11:30 AM

6.8 After pressing Save, a case reference number will be assigned to the call and concurrently an email will be sent to the call originator.



Sage CRM - Windows Internet Explorer

http://crm.sec.co.sz/crm/eware.dll/go

Case: 257-68655

Suburb Area:

Summary

This is the Case Summary screen. Additional information about this Case can be accessed on the Notes, Communications, Documents, Tracking and Solutions tabs. If your system has Case Workflow enabled, you will see a number of workflow bullets on the right-hand side of the Case Summary page. You use these bullets to Progress the case.

Details

Case Reference ID: 257-68655

Category: General Request

Type: IT Support

Source: Phone

Severity: Medium

Case Originator: SABELO MTETWA

Remarks: Please reset CRM password for SEC1025

Information

Assigned To: Sicelo Mndzebele

Team: IT

Status: In Progress

Closed:

Actions:

Current State: Case Logged

Assign to Technician

Re-Assign

6.9 Then the call status will be Logged and two options are available on the call.

Either to Assign it to a Technician or to Reassign it.

6.10 On clicking **Assign to Technician** link, it will give the user an option to Assign it to Technician on the following screen:

LOGGING A CALL ON THE HELPDESK SYSTEM PROCEDURE



System:
Quality Management System

Reference No. Revision No:
Q-F-IT-P-29, Rev 1

Originated by:
Systems Administrator

Revision Date:
16.01.2014


Page No:
Page 5 of 7

Authorised by:
IT Manager

6.11 Enter the IT Technician, description of the IT problem and the Tracking note details and click **Save**.

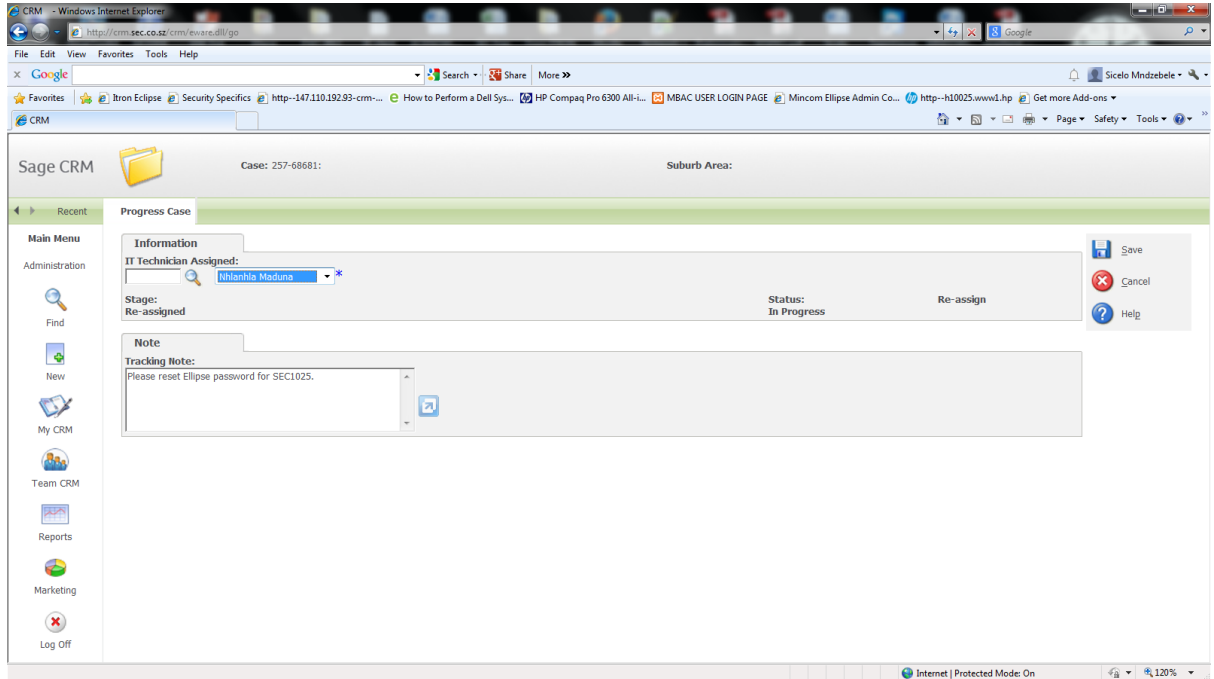
6.12 On Clicking **Save**, the call will be assigned to the IT Technician and will receive an email informing him/her of user call. The call status will be in progress.

6.13 The IT Technician will then have to login as oneself to view the details of the call, work on it, and then later complete it using the **Complete Case** link. If the

LOGGING A CALL ON THE HELPDESK SYSTEM PROCEDURE		
System: Quality Management System	Reference No, Revision No: Q-F-IT-P-29, Rev 1	Originated by: Systems Administrator
Revision Date: 16.01.2014	Page No: Page 6 of 7	Authorised by: IT Manager

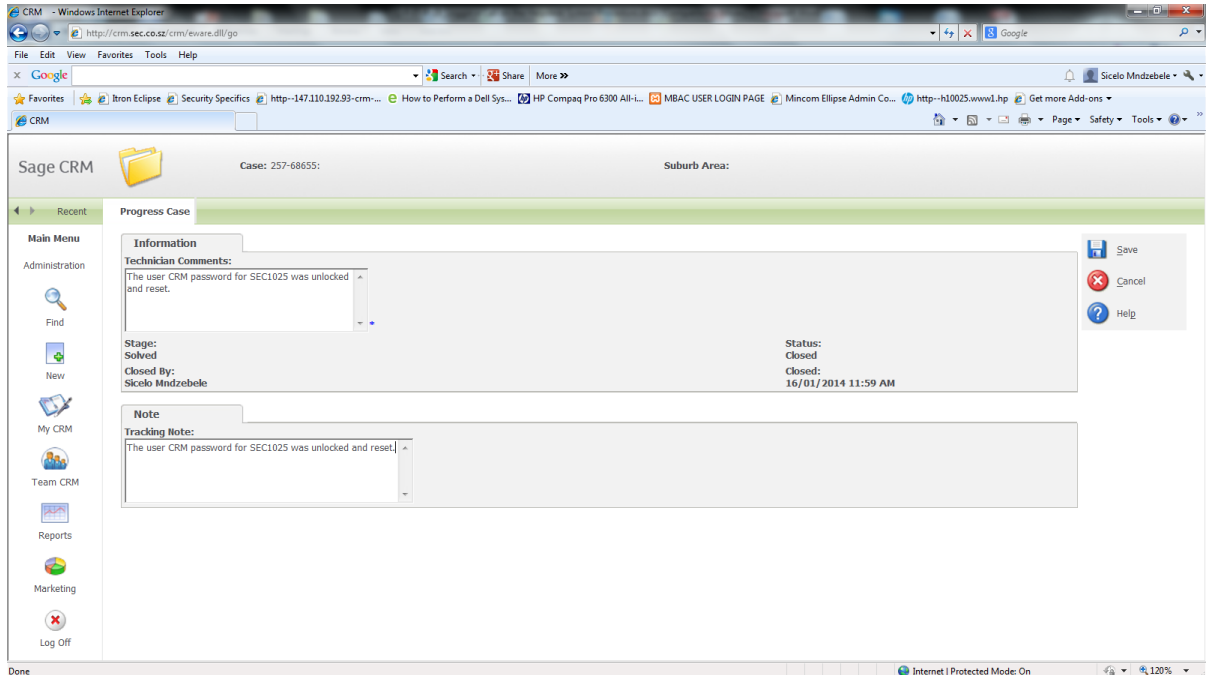
call has been wrongfully assigned, one can re-assign it to the correct call using the **Re-assign** link.

6.14 Option 1: On clicking the **Re-assign link, the following screen appears:**



6.15 Enter the IT Technician Assigned and Tracking Note details and click **Save**.
The call will be re-assigned to the user the call re-assigned to.

6.16 Option 2: On clicking the **Complete Case link, the following screen appears:**



LOGGING A CALL ON THE HELPDESK SYSTEM PROCEDURE



System:
Quality Management System

Reference No. Revision No:
Q-F-IT-P-29, Rev 1

Originated by:
Systems Administrator

Revision Date:
16.01.2014

Page No:
Page 7 of 7

Authorised by:
IT Manager

6.17 Enter the Technician Comments and Tracking Notes details and, click the Save button to complete the case. At each stage, an email is sent to the relevant user needed to be notified.

6.18 On clicking **Save**, the call will be completed.

The screenshot displays the Sage CRM interface for Case 257-68655. The 'For' section shows 'Customer: -None selected-' and 'Contact Name:'. The 'Details' section includes 'Case Reference ID: 257-68655', 'Category: General Request', 'Source: Phone', 'Severity: Medium', and 'Describe IT Problem: Please reset CRM Password for SEC1025'. The 'Remarks' section contains 'Please reset CRM password for SEC1025'. The 'Information' section shows 'Assigned To: Sicelo Mndzebele', 'Team: IT', 'Status: Closed', and 'Closed: 16/01/2014 11:59 AM'. The 'Current State' is 'Completed'.

7 Records

N/A