

## SmartService SOP

### About the Application – SmartService

**SmartService** is a service management suite tailored specifically to support and manage various services rendered to our end-users/employees. Reporting Incidents, requesting for services, managing problems, events, assets, & changes are some of the processes this solution is designed to support.

### Incident Management:

An incident is classified as an unplanned event that causes either disruption of services or impacts the availability, integrity and confidentiality of an Information asset. Use this solution to report similar Incident. The solution is designed to assign the Incident ticket to the respective owner to ensure quick resolutions and resumption of the affected service. The unresolved tickets shall be automatically notified to the next level accountable person, if the resolution is not done timely.

**Request Management:** Unlike Incident tickets, requests ticket should be raised for service requests such as:

- Requesting for access to applications/sub-modules,
- Requesting for functional training of a business application,
- Requesting for resetting the password,
- Requesting for a replacement of a faulty/dysfunctional asset
- Requesting for information/data
- Request for hardware upgrades
- Request for asset allocations/de-allocations/repairs

The service requests are routed to the designated service teams, who shall fulfil the requests within the agreed service timelines.

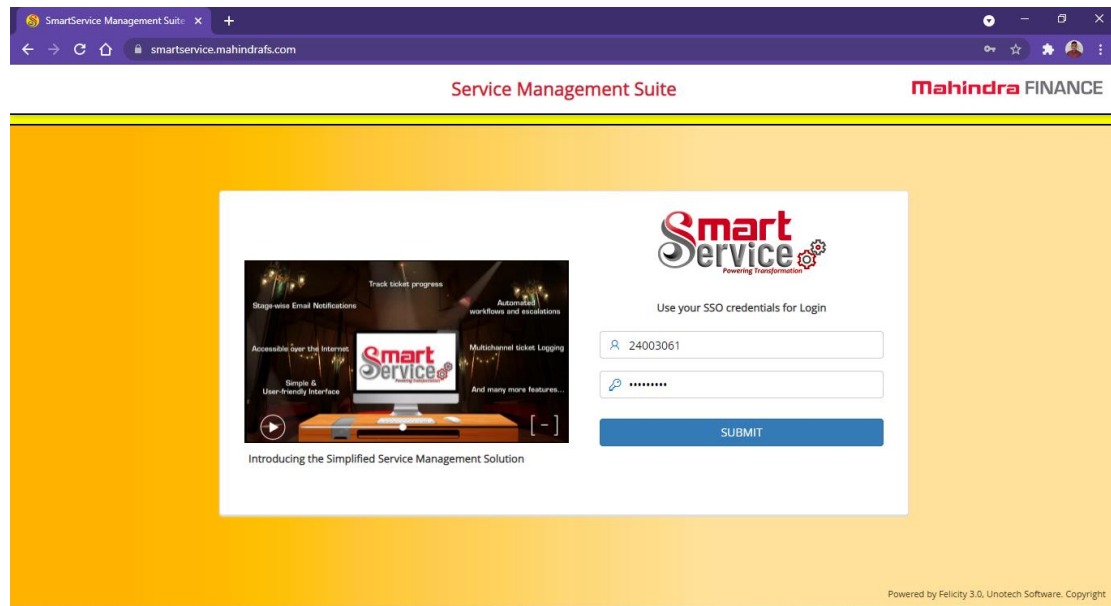


**Smart Service Management Suite**

Use and preserve the URL to access the solution

<https://smartservice.mahindrafs.com>

## Smart Service Portal Login Screen:

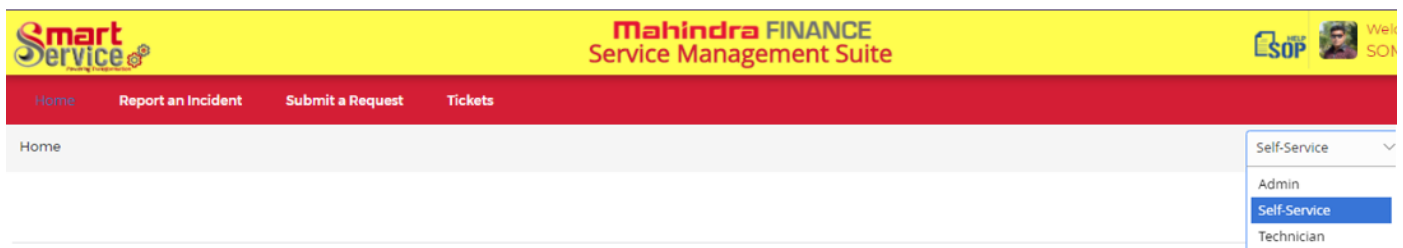


## Credentials to use:

Please use your SSO credentials for successful login to Smart Service portal.

## User Profile / User Groups:

Once you are logged in to Smart Service portal you can see different Profiles or Groups as per the rights assigned.



- ❖ Admin - This role exercises full access to add, change, modify & delete any predefined roles. (Rights available only with SmartService Project Heads)
- ❖ Self Service - This role is common to every user to raise the ticket with least privileges.
- ❖ Technician - Technician profile is to assign or reassign the tickets to respective user or group as per defined SLA.

The users will be categorized in either of the above groups based on their roles and responsibilities. You can get to know the roles in greater details while exploring the tool.

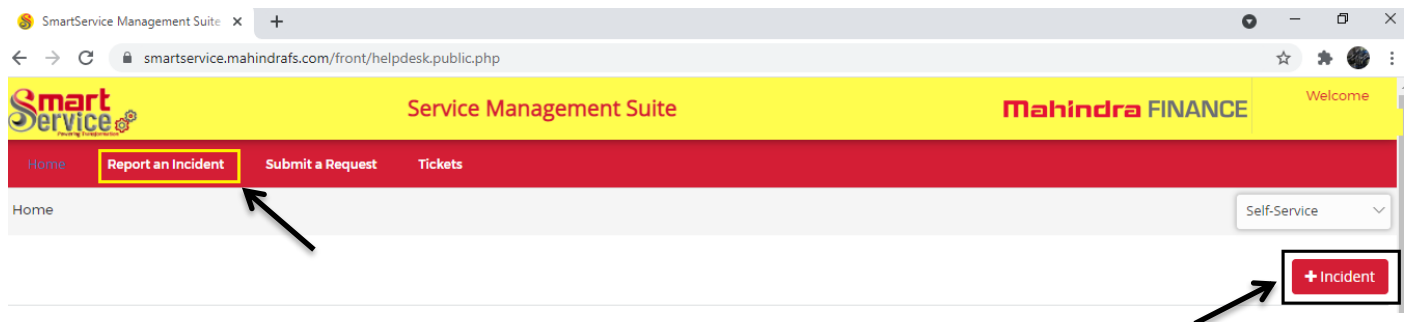
## Various ways for Incident & Request submission:

You can create a ticket through Smart Service portal, E-mail & SMS.

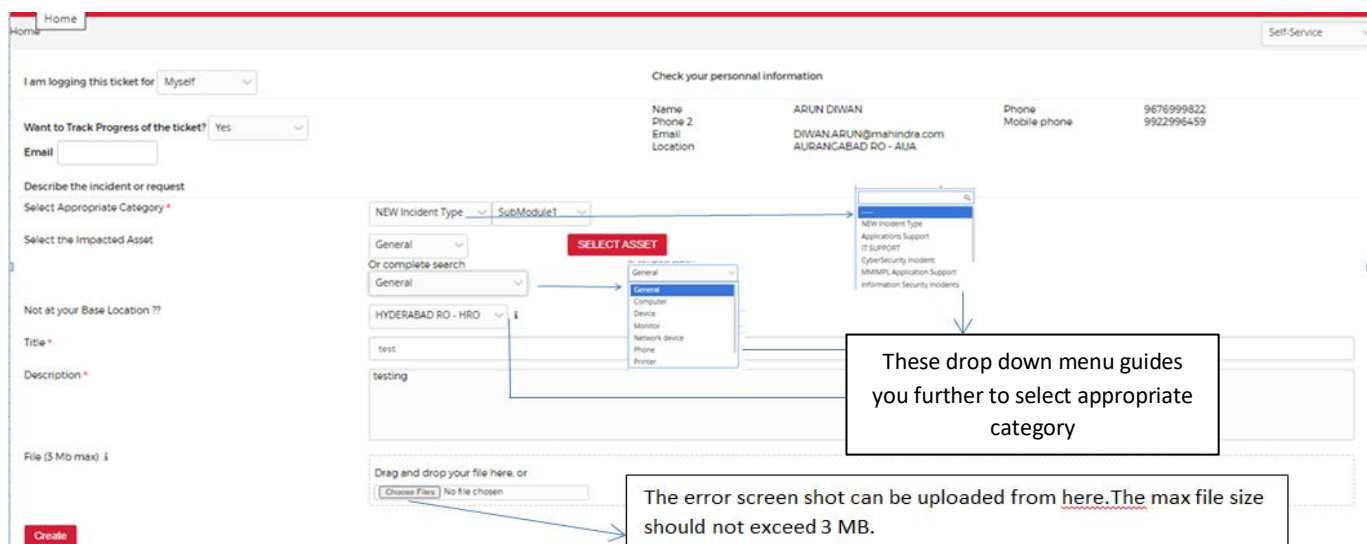


## Ticket creation via SmartService module:

Please click on “+Incident tab” or “Report an Incident” tab on the Dashboard as shown below. However, the functions of both the tabs are same.



You will be directed to below screen.



These drop down menu guides you further to select appropriate category

The error screen shot can be uploaded from [here](#). The max file size should not exceed 3 MB.

Home

I am logging this ticket for **Myself**

Want to Track Progress of t **Myself**

Want to Track Progress of the ticket? **Yes**

Email

**Myself**- If the incident is raised for self.

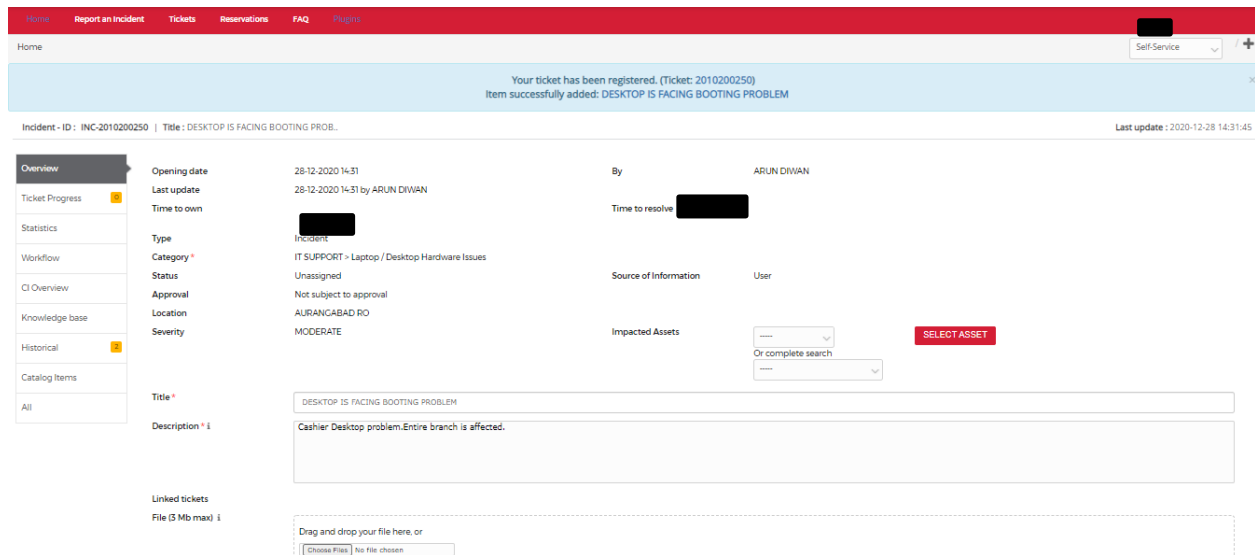
**Someone Else** - If it is for other employee. When you choose this option additional window pops up to enter sap code of that entity. Enter sap code & proceed further.

In case the user wants to track the progress of the ticket over E-mail then one needs to choose the option Yes, else choose No.

→ After selecting appropriate fields, click on **Create** tab to register the Incident.

## Ticket logged intimation to User / Requester:

The moment ticket is generated, below screen will be displayed with the ticket no. and also an email is triggered to requester with all the details about the ticket.



Home | Report an Incident | Tickets | Reservations | FAQ | Sign In

Home | Self-Service | +

Your ticket has been registered. (Ticket: 2010200250)  
Item successfully added: DESKTOP IS FACING BOOTING PROBLEM

Incident - ID : INC-2010200250 | Title : DESKTOP IS FACING BOOTING PROBLEM. | Last update : 2020-12-28 14:31:45

**Overview**

Ticket Progress

Statistics

Workflow

CI Overview

Knowledge base

Historical

Catalog Items

All

Opening date: 28-12-2020 14:31  
Last update: 28-12-2020 14:31 by ARUN DIWAN  
Time to own: [Redacted]

Type: Incident  
Category: IT SUPPORT > Laptop / Desktop Hardware Issues  
Status: Unassigned  
Approval: Not subject to approval  
Location: AURANGABAD RO  
Severity: MODERATE

By: ARUN DIWAN  
Time to resolve: [Redacted]

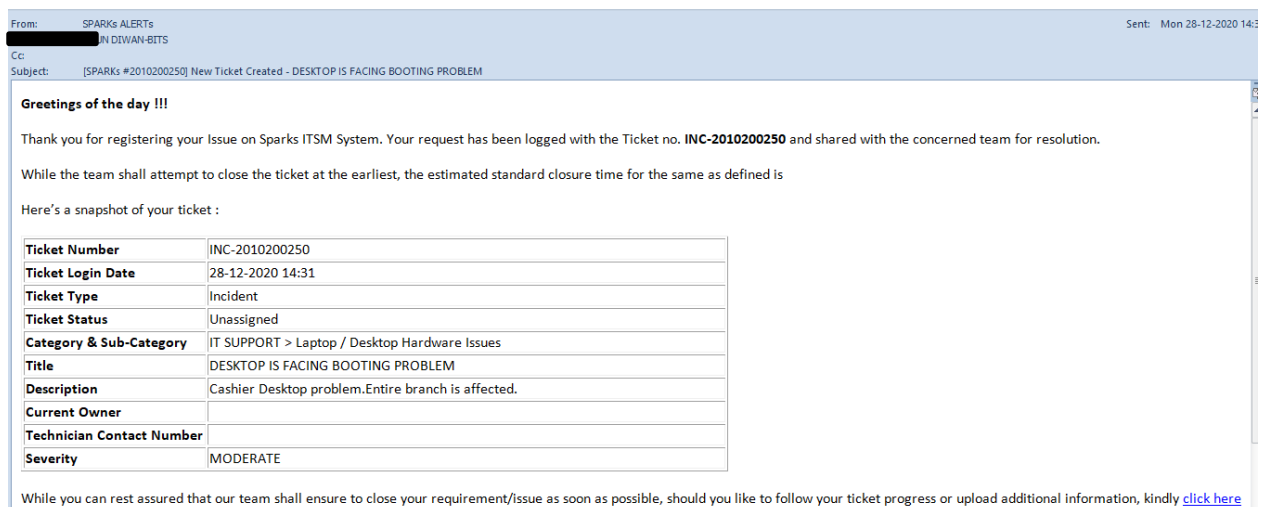
Source of Information: User

Impacted Assets: [Dropdown] [SELECT ASSET] [Or complete search] [Dropdown]

Title: DESKTOP IS FACING BOOTING PROBLEM  
Description: Cashier Desktop problem.Entire branch is affected.

Linked tickets  
File (3 Mb max) | [Drag and drop your file here, or] [Choose File] [No file chosen]

Below is the sample mail triggered stating your incident has been registered with Ticket details.



From: SPARKs ALERTs [Redacted]@IN DIWAN-BITS | Sent: Mon 28-12-2020 14:31:45

Cc: [Redacted]

Subject: [SPARKs #2010200250] New Ticket Created - DESKTOP IS FACING BOOTING PROBLEM

**Greetings of the day !!!**

Thank you for registering your Issue on Sparks ITSM System. Your request has been logged with the Ticket no. **INC-2010200250** and shared with the concerned team for resolution.

While the team shall attempt to close the ticket at the earliest, the estimated standard closure time for the same as defined is

Here's a snapshot of your ticket :

<b>Ticket Number</b>	INC-2010200250
<b>Ticket Login Date</b>	28-12-2020 14:31
<b>Ticket Type</b>	Incident
<b>Ticket Status</b>	Unassigned
<b>Category &amp; Sub-Category</b>	IT SUPPORT > Laptop / Desktop Hardware Issues
<b>Title</b>	DESKTOP IS FACING BOOTING PROBLEM
<b>Description</b>	Cashier Desktop problem.Entire branch is affected.
<b>Current Owner</b>	
<b>Technician Contact Number</b>	
<b>Severity</b>	MODERATE

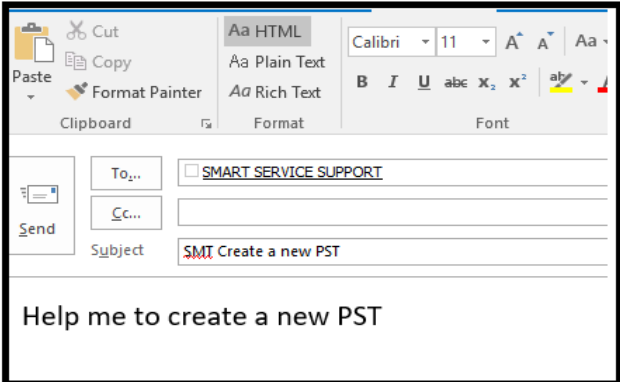
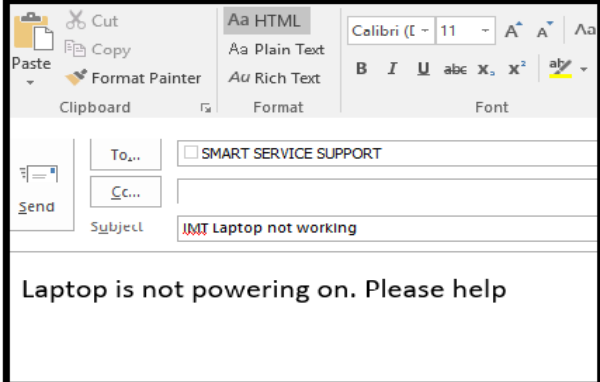
While you can rest assured that our team shall ensure to close your requirement/issue as soon as possible, should you like to follow your ticket progress or upload additional information, kindly [click here](#)

### Ticket Creation Via Email

You can send an email to [Support.SmartService@mahfin.com](mailto:Support.SmartService@mahfin.com) for registering an Incident or raising a Request ticket. Once it is successfully registered you will receive an email acknowledgement about the ticket on the requester mail ID.

Send an email with the subject line mentioning **IMT for Incident** "IMT <Incident>" and **SMT for Service Request** "SMT <Request>"

Example:

Request Ticket	Incident Ticket
	

### Ticket Creation Via SMS

You can send a SMS to **8886643177** starting with **IMT for Incident** and **SMT for Service Request** as shown below



## End User Ticket Assigned To:

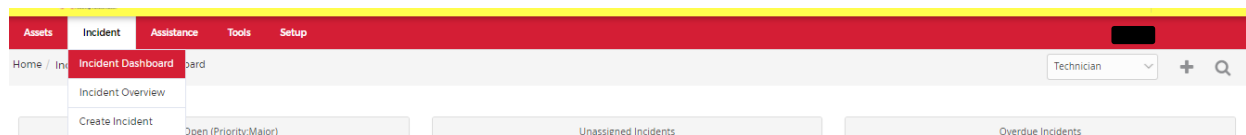
Once the ticket is raised by User, it will be assigned to Service Desk Team and in few exception cases it will be assigned to Application Support Team.

## Technician Login:

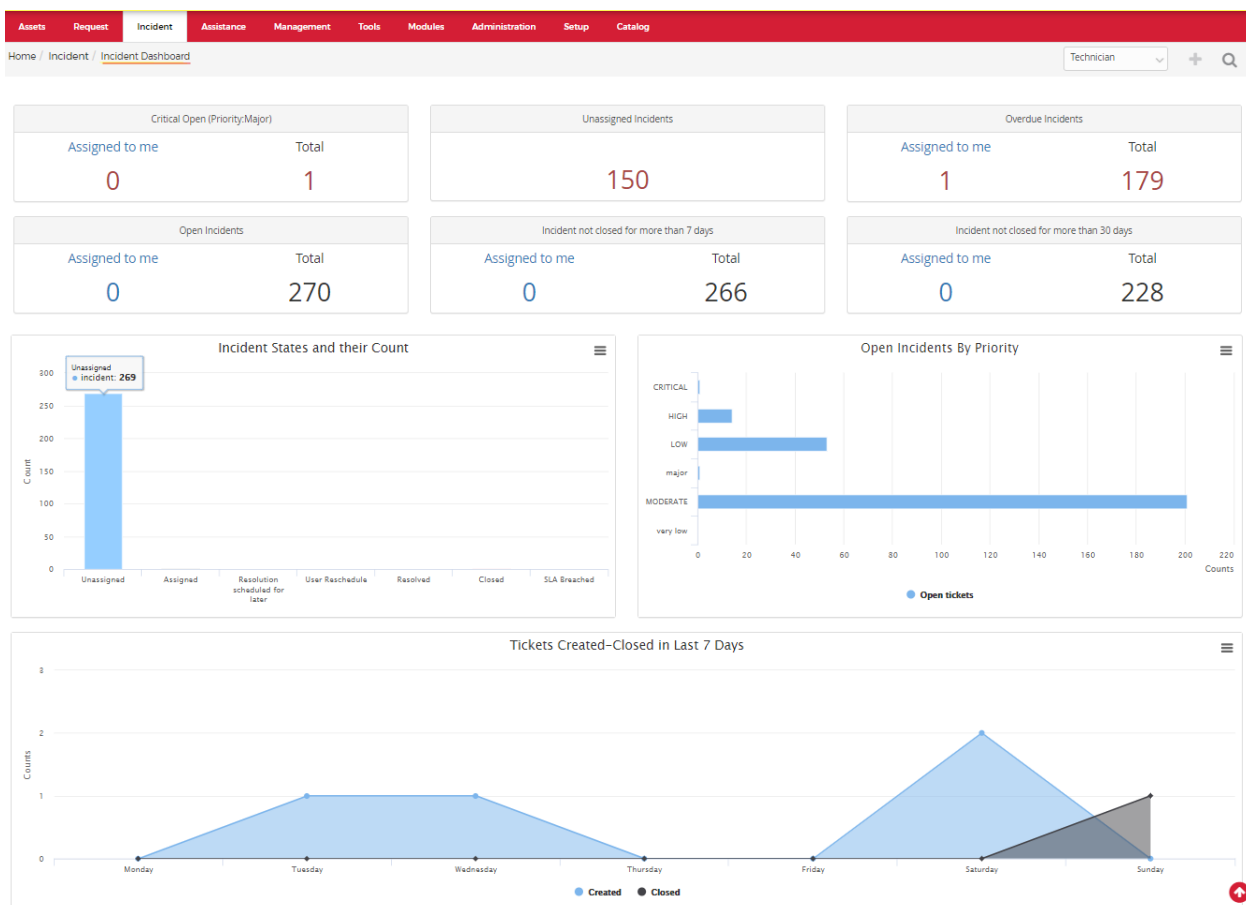
1. Once the ticket is logged, Technician can claim [ own the ticket], assign and reassign the ticket to respective Groups and Application support team.
2. Technician can also change and modify the ticket category, if it is raised under inappropriate category.
3. Technician is Provisioned to raise the ticket under technician login.

## Understanding Tickets:

We will explore the available options in Technician dashboard.



Click on **Incident Dashboard** under **Incident** and you will get to know overall summary of the tickets along with graphical representation as shown below.



**Incident overview** helps you with the complete details about the tickets as you can see here.

AssetsRequestIncidentAssistanceManagementToolsModulesAdministrationSetupCatalog

Home / Incident / Incident Overview

Technician

+

Q

Characteristics - Type

is

Incident

Search

Display (number of items) 5

Current page in landscape PDF

From 1 to 5 of 282

Actions

Ticket #	Title	Status	Last update	Ticket source	Opening date	Priority	Requester	Assigned to	Time to resolve	Category	Impacted Application	Type
INC-2010200250	DESKTOP IS FACING BOOTING PROBLEM	Unassigned	28-12-2020 14:31	User	28-12-2020 14:31	MODERATE	ARUN DIWAN			IT SUPPORT - Laptop / Desktop Hardware Issues		Incident
INC-2010200248	I AM UNABLE TO ACCESS NETWORK DUE TO IP ADDRESS CONFLICT	Closed	28-12-2020 12:58	User	27-12-2020 00:06	LOW	ARUN DIWAN	RAKESH RAI	28-12-2020 10:00	IT SUPPORT - IP Address Conflict		Incident
INC-2010200029	TEST	Closed	28-12-2020 12:31	E-Mail	26-10-2020 12:28	MODERATE	ARUN DIWAN	RAKESH RAI	26-10-2020 16:28	APPLICATION SUPPORT		Incident
INC-2010200028	test	Resolved	28-12-2020 12:27	Helpdesk	26-10-2020 12:16	MODERATE	ARUN DIWAN	RAKESH RAI	26-10-2020 16:16	Appl		Incident
INC-2010200249	LAPTOP NOT WORKING -TESTING	Closed	28-12-2020 11:18	User	28-12-2020 10:37	MODERATE	ARUN DIWAN	RAKESH RAI		IT SUPPORT - Laptop / Desktop Hardware Issues		Incident

Now we will see how the unassigned incidents are assigned to respective Technicians. Let us observe the example of “Desktop facing booting problem”.

Ticket #	Title	Status	Last update	Ticket source	Opening date	Priority	Requester	Assigned to	Time to resolve	Category	Impacted Application	Type
INC-2010200250	DESKTOP IS FACING BOOTING PROBLEM	Unassigned	28-12-2020 14:31	User	28-12-2020 14:31	MODERATE	ARUN DIWAN			IT SUPPORT - Laptop / Desktop Hardware Issues		Incident

Once you click on “Desktop facing booting problem” you will be directed to the Ticket assigning page as shown below.

Overview

Ticket Progress

Statistics

Workflow

Project tasks

CI Overview

Knowledge base

Approvals

Request Overview

Historical

Catalog Items

Budgets

Major Incident

All

Opening date

28-12-2020 14:31

By

ARUN DIWAN

Last update

28-12-2020 14:31 by ARUN DIWAN

Time to own

Time to resolve

Type

Incident

Category

IT SUPPORT - Laptop / Desktop Hardware Issues

Status

Unassigned

Source of Information

User

Approval

Not subject to approval

Location

AURANGABAD BHO

Severity

MODERATE

Impacted Assets

Select Asset

Title

DESKTOP IS FACING BOOTING PROBLEM

Description

Cashier Desktop problem. Entire branch is affected.

Linked tickets

File (5 Mb max)

Contact No

Actor

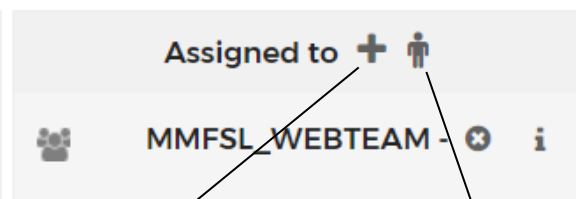
Requester

ARUN DIWAN

Watcher

Assigned to

Save



Click on “+” symbol for assigning the ticket to other Technician

To assign the ticket to Your-Self click on the Human Image.

In this example the ticket is assigned to other Technician.

Home / Ticket / Edit Ticket

Item successfully updated: DESKTOP IS FACING BOOTING PROBLEM

Incident - ID : INC-2010200250 | Title : DESKTOP IS FACING BOOTING PROBL. | Last update : 2020-12-28 15

Overview

Ticket Progress

Statistics

Workflow

Project tasks

CI Overview

Knowledge base

Approvals

Request Overview

Historical

Catalog Items

Budgets

Major Incident

All

Opening date: 28-12-2020 14:31

Last update: 28-12-2020 15:56 by ARUN DIWAN I

Time to own

Type: IT SUPPORT - Laptop / Desktop Hardware issues

Category: Assigned

Status: Not subject to approval

Location: AURANGABAD RO

Severity: MODERATE

Time to resolve

Source of information: User

Impacted Assets: 0

Select Asset

Or complete search

Title: DESKTOP IS FACING BOOTING PROBLEM

Description: Cashier Desktop problem. Entire branch is affected.

Linked Tickets: 0

File (3 Mb max)

Drag and drop your file here, or

Choose Files | No file chosen

Contact No

Actor

Requester: ARUN DIWAN I

Watcher: +

Assigned to: + RAKESH RAI I

Save

Now the assigned Technician starts working on the Ticket & any additional information with the requester can be exchanged here. You are viewing the screen of Technician to whom the ticket is assigned.

Home / Incident / Edit Incident

Incident - ID : INC-2010200250 | Title : DESKTOP IS FACING BOOTING PROBL. | Last update : 2020-12-28 15:36:54

Overview

Ticket Progress

Statistics

Workflow

Project tasks

CI Overview

Knowledge base

Approvals

Report Progress

Assign Related Task

Document

Solution

Solution template

Solution type

Save and add to the knowledge base

Description

Formats

B

I

A

A

Search a solution

You can monitor the progress of your ticket from below screen & also update additional information related to your ticket here.

Overview

Ticket Progress

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Project tasks

CI Overview

Knowledge base

Approvals

Request Overview

Historical

Catalog Items

Budgets

Major Incident

All

Report Progress

Document

Solution

Document Type

Request/Update Addnl. Information

File(s) (3 Mb max)

Drag and drop your file here, or

Choose Files | No file chosen

Cancel

Add

Private

No

Timeline Filter

28-12-2020 14:31

ARUN DIWAN I

DESKTOP IS FACING BOOTING PROBLEM

Cashier Desktop problem. Entire branch is affected.

Ticket# 2010200250 description

Name	ItemType	File	Web link	Heading	MIME type	Date
------	----------	------	----------	---------	-----------	------



User can see here the Technician has worked on the incident & provided the solution.

Request - ID : REQ-2104280401 | Title : vpn issue Last update : 12:20:05

Overview  
Ticket Progress  
Statistics  
Workflow  
CI Overview  
Historical  
All

Document

Approval of the solution

Comments (Optional when approved)

Approve the solution Refuse the solution

User can track the solution provided by the Technician here

Timeline Filter

11-08-2021 12:20  
issue resolved  
Permanent Fix

User can approve or refuse the solution & provide his inputs here.

Request - ID : REQ-2104280401 | Title : vpn issue Last update : 12:20:05

Overview  
Ticket Progress  
Statistics  
Workflow  
CI Overview  
Historical  
All

Document

Approval of the solution

Comments (Optional when approved)

My issue has been resolved.

Approve the solution Refuse the solution

User has to approve the solution once the issue got resolved

User can refuse the solution if he/she is not satisfied with the solution provided

Timeline Filter

11-08-2021 12:20  
issue resolved  
Permanent Fix

Once the user has accepted the solution & rated his satisfaction level, these remarks & ratings can be modified up to 1 hour.

Home Self-Service +

Request - ID : REQ-2104280401 | Title : OFFICE 2016 INSTALLATION REQUI.. Last update : 2021-04-30 18:00:01

Overview  
Ticket Progress  
Statistics  
Workflow  
CI Overview  
Historical  
Satisfaction

Satisfaction with the resolution of the ticket ★★★★★

Comments

I am Satisfied with the quick response

Save

## Linking Tickets:

Technicians can link tickets that are duplicate or club all the child ticket to Parent by selecting appropriate category & once the Parent ticket is resolved all the child gets resolved automatically.

We will see one detailed example on how to link the tickets & process the closure of the same.

We have selected these two child tickets

Ticket #	row	Status	update	source	date	Priority	requester	Assigned to	Time to resolve	Category	Impacted Application	Watcher	Location
INC-201020022	My laptop Hard disk is making noise	Assigned	31-12-2020 12:00	User	19-12-2020 13:26	LOW	ARUN DIWAN	ARUN DIWAN	21-12-2020 14:00	IT SUPPORT > Laptop / Desktop Performance Issues		RAMESH LACHANE KEVIN SHAH SANTHOSH KUMAR BITSERVICEDESK MAHADASHITRA PANKAJ SRIVASTAVA	ALIA
INC-201020022	PROBLEM GENERATING REPORTS IN ACRS	Assigned	31-12-2020 11:11	User	30-12-2020 12:44	HIGH	ARUN DIWAN			Applications Support > Report Generation Error / Incorrect Report Generated > Asset Collection & Recovery System (ACRS)			ALIA
NC-2010200263	PROBLEM GENERATING REPORTS IN ACRS	Assigned	31-12-2020 11:11	User	30-12-2020 12:47	HIGH	RAKESH RAI			Applications Support > Report Generation Error / Incorrect Report Generated > Asset Collection & Recovery System (ACRS)			ROF
NC-2010200268	child ticket	Unassigned	31-12-2020 11:09	User	31-12-2020 11:09	HIGH	ARUN DIWAN			Applications Support > Report Generation Error / Incorrect Report Generated > Asset Collection & Recovery System (ACRS)			ALIA

Incident - ID : INC-2010200262 | Title : PROBLEM GENERATING REPORTS IN ACRS | Last update : 2020-12-31 11:11

Overview

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Knowledge base

Approvals

Request Overview

Historical

Catalog Items

Budgets

Major Incident

All

Opening date

Last update

Time to own

Type

Category\*

Status

Approval

Location

Severity

Title\*

Description\*

Linked tickets +

File (5 Mb max) i

Contact No

Actor

By

Time to resolve

Source of Information

Impacted Assets

SELECT ASSET

Create a child incident

Requester

Watcher +

Assigned to +

ARUN DIWAN

WEB\_Team -

Save

Historical

Catalog Items

Budgets

Major Incident

All

Title\*

Description\*

Linked tickets +

File (5 Mb max) i

Contact No

Actor

Parent of PROBLEM GENERATING REPORTS IN ACRS (2010200263)

Duplicates child ticket (2010200268)

Drag and drop your file here, or

Choose Files

No file chosen

Requester

Watcher +

Save

We have linked 2 tickets as child here.

Incident - ID: INC-2010200262 | Title: PROBLEM GENERATING REPORTS IN ACRS

Parent Ticket

Overview | Document | **Solution**

**Ticket Progress** 1

Statistics

Workflow

Project tasks

CI Overview

Knowledge base

Approvals

31-12-2020 13:52  
ARUN DIWAN i  
Network issue was identified & problem is resolved now

30-12-2020 12:44  
ARUN DIWAN i  
PROBLEM GENERATING REPORTS IN ACRS  
PROBLEM GENERATING REPORTS IN ACRS

You can see in below figure on resolving the parent ticket all the 3 tickets got resolved.

Ticket #	Title	Status	Last update ↓	Ticket source	Opening date	Priority	Requester	Assigned to	Time to resolve	Category
INC-2010200262	PROBLEM GENERATING REPORTS IN ACRS	Resolved	31-12-2020 13:53	User	30-12-2020 12:44	HIGH	ARUN DIWAN	ARUN DIWAN		Applications Support > Repor Recovery System (ACRS)
INC-2010200263	PROBLEM GENERATING REPORTS IN ACRS	Resolved	31-12-2020 13:52	User	30-12-2020 12:47	HIGH	RAKESH RAI			Applications Support > Repor Recovery System (ACRS)
INC-2010200268	child ticket	Resolved	31-12-2020 13:52	User	31-12-2020 11:09	HIGH	ARUN DIWAN			Applications Support > Repor Recovery System (ACRS)

We have already seen the process of ticket closure & here is the detailed description on the same.

Followup | Task | Document | **Solution**

Solution template

Search a solution

Mahindra Finance  
Bug Fix  
**Permanent Fix**  
Temporary  
Work around

Solution type

Mahindra Finance  
Bug Fix  
Permanent Fix  
Temporary  
**Work around**

Save and add to the knowledge base

No

Description

No  
Yes

You can search for earlier solution if any that is already available in Knowledge base by clicking here.

Select the appropriate Solution remark as listed here.

Select the appropriate Solution Type as listed if the solution that you want to deliver is matching in the listed Categories.

If you want the solution given to be added in Knowledge base then please select **Yes** else select **No**.

### Punch Option:

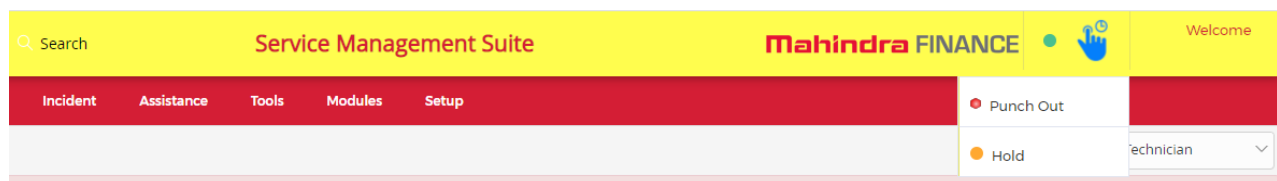
Now we will understand the use of “Punch” option provided in Smart Service portal. Punch option provided for Technician is to mark their availability in the system for the day.



- Technician can punch his availability for support.
- If Technician is out of office for lunch or for other reason they can select the option “Hold” & once they are back, click on “Resume” to mark their availability.
- Once they are done for the day click on “Punch out”

This tool helps the Reporting Manager & Technician on job to assign the tickets accordingly.

Note: -This [Punch In /Out] has nothing to do with attendance & only assists Technician availability in Smart Service portal.

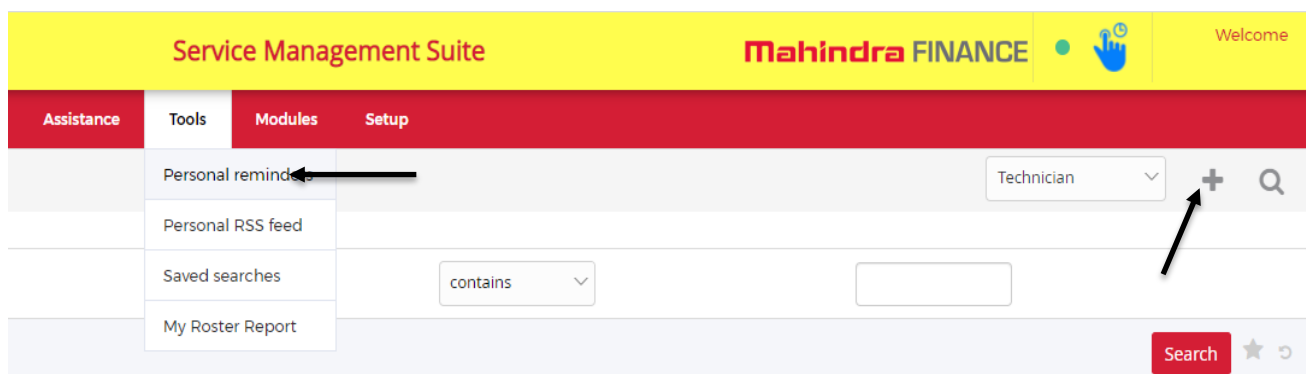


## Public Reminder

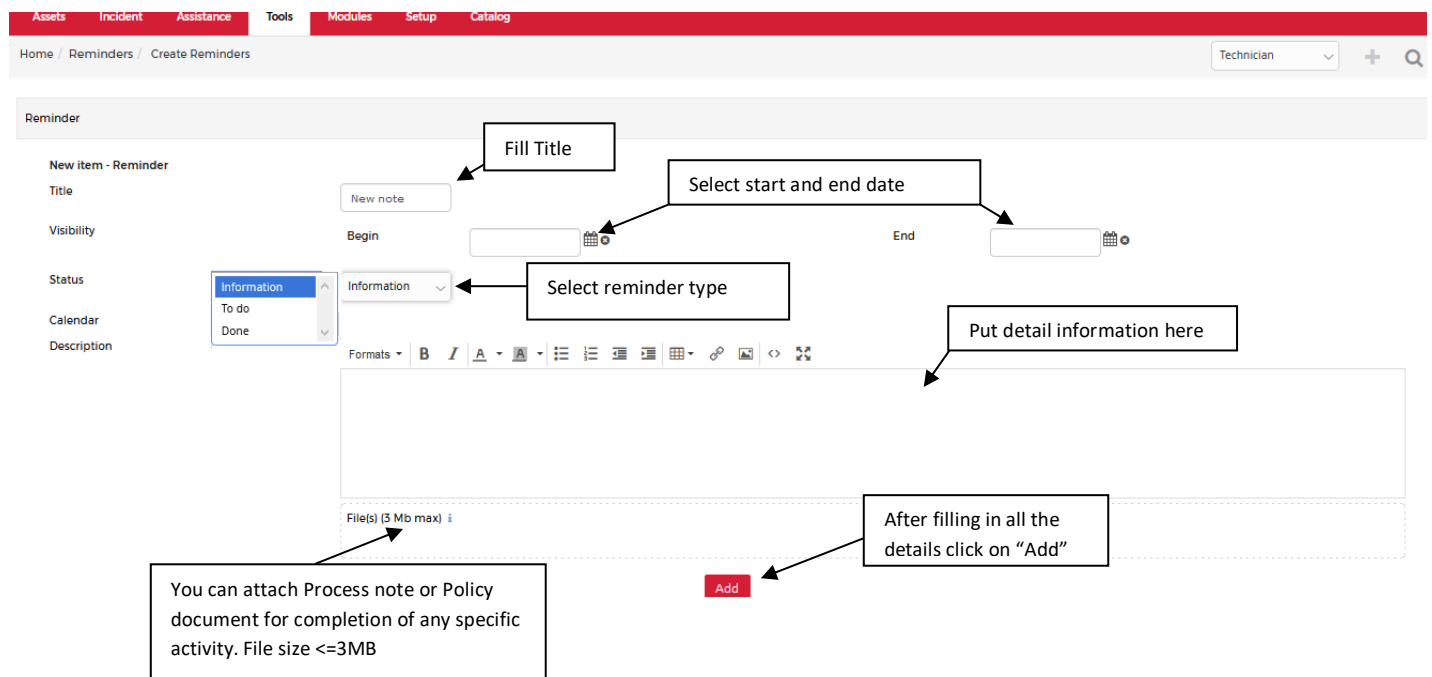
Reminder option in SmartService helps us to inform about any planned activities, Things to do & also to update completion of specific Tasks.

Technician can float a message to specific group or even individual user.

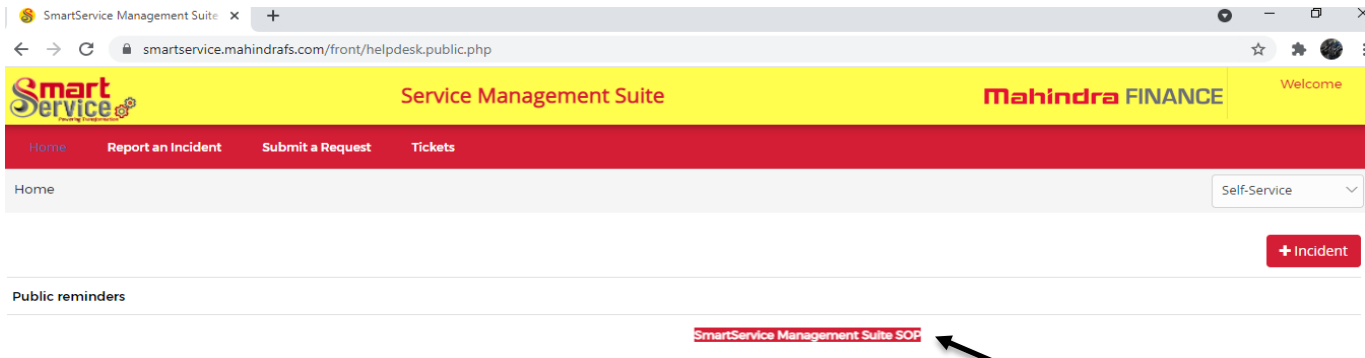
For creating a message Reminder, Technicians needs to click on Tools and select the Reminders tab, then click on plus “+” sign as shown below.



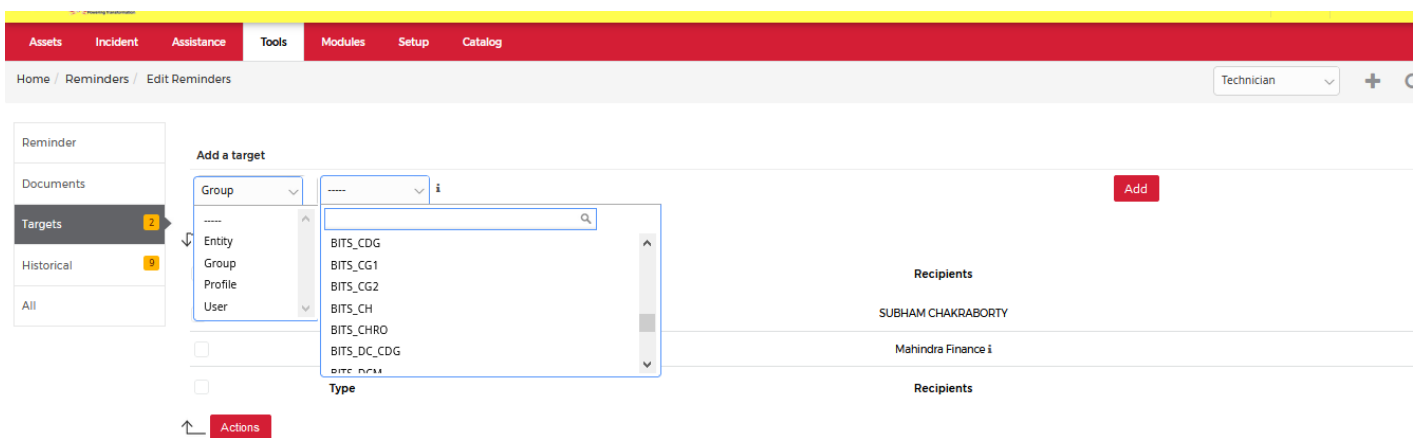
Put in the required details about the activity & click on add button.



Once you click on “Add” the message floats as shown in the example below for the defined period.

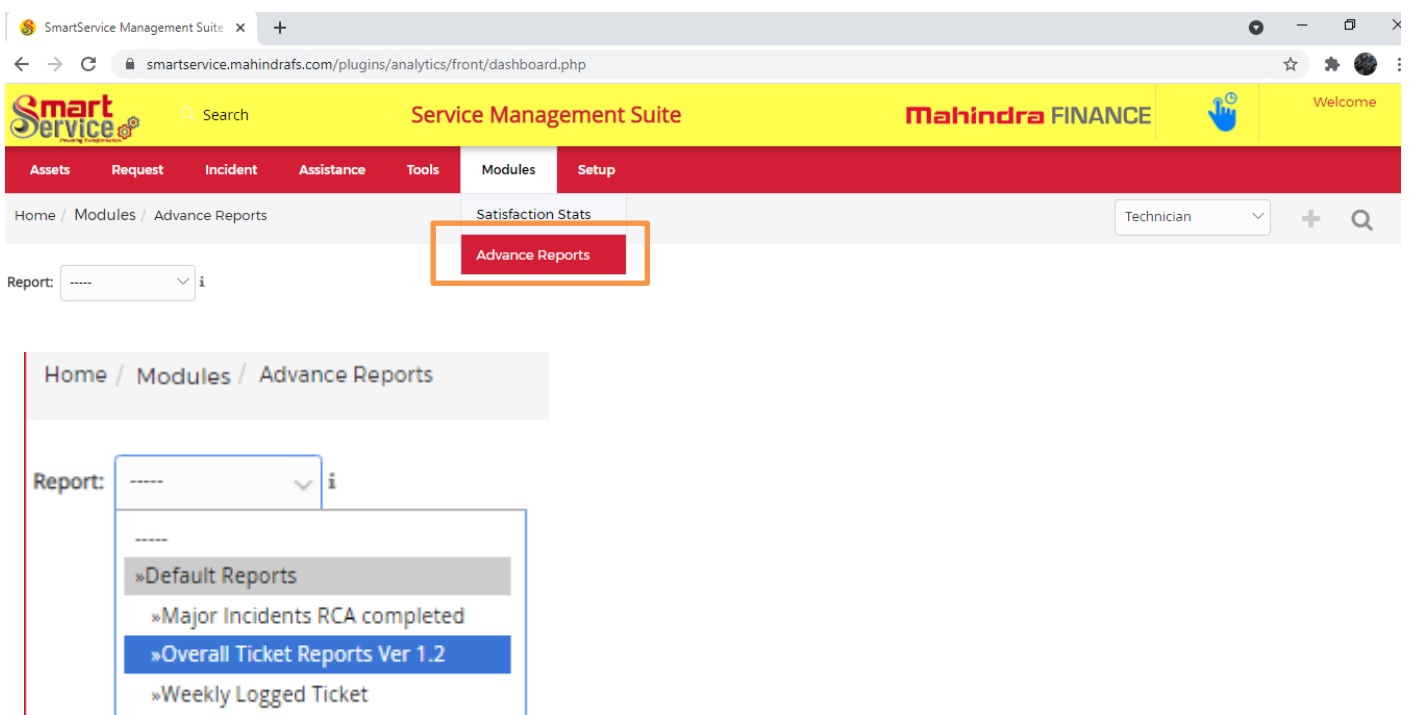


Technicians can later modify and set the targeted viewers from below screen.



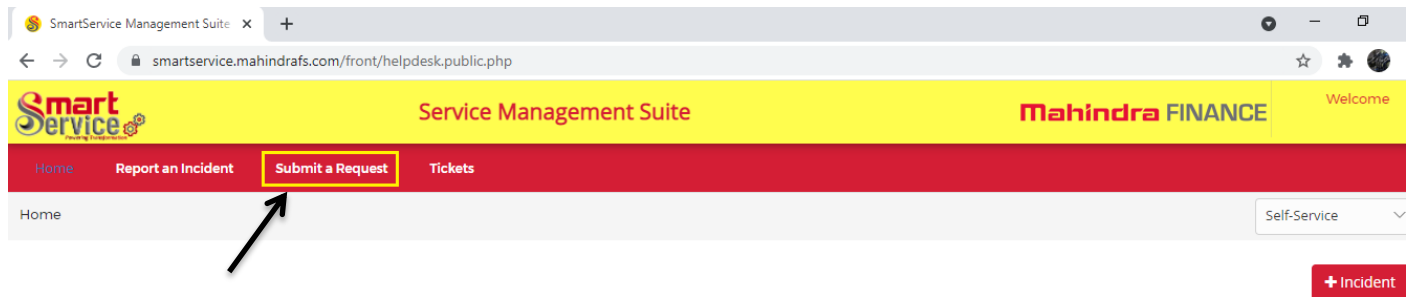
## Report Module:

Click on Modules – Advance Report & generate reports as per rights allocated.



### Request Management:

Please click on “Submit a Request” to create a Request ticket through Smart Service portal. Once the request is created all the further process till the closure is similar to Incident Management.



For any further Clarity/Queries/Suggestions & Feedback do write us on [Project.SmartService@mahindra.com](mailto:Project.SmartService@mahindra.com)

.....Good Luck.....