NETCOMPANY

DMS ONBOARDING TOOLKIT USER GUIDE

—

Version: 1.2
Status: Approved
Approver: Reza Kheirkhah
Author: Jesper Bergendorff

netcompany

Document history

Version	Date	Author	Status	Comments
1.0	02-09-2022	Jesper Sture Bergendorff	Approved	
1.1	14-09-2022	Jesper Sture Bergendorff	Approved	Updated to reflect current state of Toolkit
1.2	12-04-2023	Jesper Sture Bergendorff	Approved	Updated to reflect current Toolkit

Table of contents

1 Introduction

The purpose of DMS's Onboarding Toolkit is to provide technical support to companies during the onboarding process to DMS. The Toolkit is only intended for technical support, so any customs-related questions should be directed to TOLDST ServiceDesk.

1.1   Contact information

The Onboarding team can be contacted by writing an email to dms-onboarding@ufst.dk

Here is a link to the Toolkit: https://goto.netcompany.com/cases/GTE1496/UFSTONB2/default.aspx

2 Homepage

Each company signed up for onboarding receives *one* account to access the Toolkit. Once your account has been set up, the email address used to set up the account will receive an email with instructions on how to set a password. Once you have set a password and logged in, you should land on the following page.

On the left, you have the quick access-menu. Here you find links to

- the homepage,

- the document library,

- your cases,

- issues

- maintenance windows.

In the middle of the homepage you find a Header element called **Toolkit information**, underneath which is an overview of the status on the test environments of DMS. Underneath the status element is a brief user guide to the Toolkit, and underneath this is an overview of cases created by you. To the right, you find known issues and maintenance windows. Please consult known issues and maintenance windows before creating a case, as these may prolong or otherwise affect the case process.

3 Document library

The document library currently contains the user guide for Toolkit. For more onboarding related documentation and guides, please visit Skatteforvaltningens GitHub.
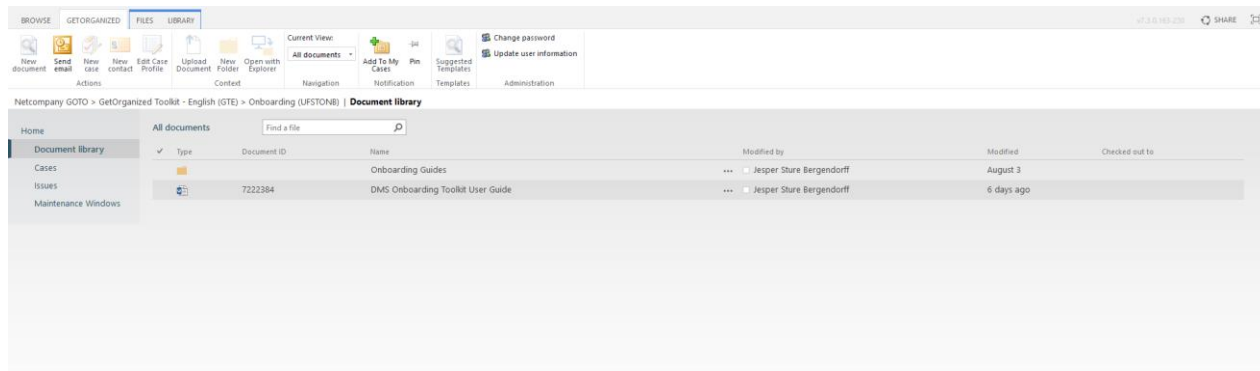
4 Cases

Here you can create cases and see the status of your current cases. When you create a case, the DMS Onboarding team will then process your case and provide the necessary assistance. You can create a case directly from the homepage, or by going to the cases page.
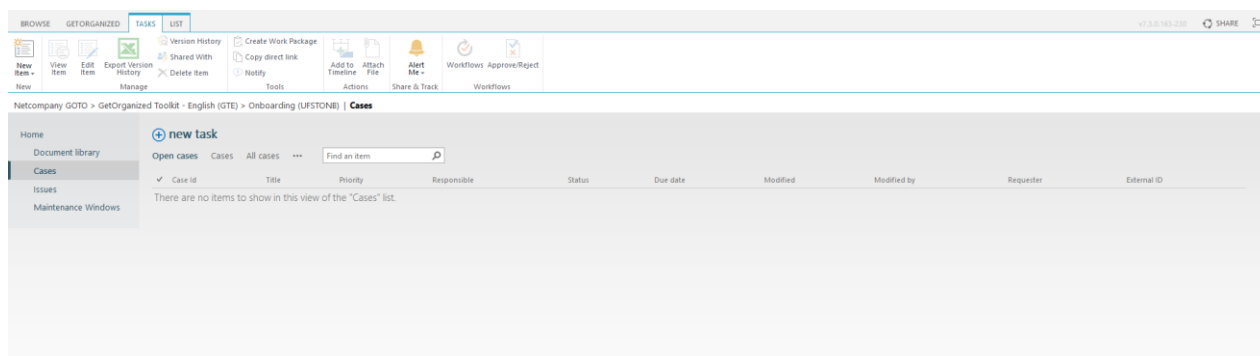
Above is a screenshot of the cases list, which displays your cases. Note that you can only see cases created by yourself, and that your cases are not visible to any other users, apart from the DMS Onboarding team and Toldstyrelsen. Click the "new task" button to start creating a case. You will then be presented with the following view.

If you want to attach a file to the case, you can press the Attach File button under the Edit tab in the top of the screen (marked in red below).

When you select a Service, a template will be applied to the case fields. An example of this is shown below with the Service type "DMS S2S: Support issue [insert company name here]"

Please note that any email addresses entered in the Contacts field will receive updates when any changes occur on the case. We therefore recommend writing the email address of the person responsible for the case in the Contacts field. The email of the account that requests the case (the Requester) will also receive updates on the case.

Below is a **description of all the fields when creating a case**, with asterisks indicating mandatory fields. Any field not mentioned here should be left as is.

Field	Description
Case type*	Choose "Service Request".
Service*	Choose the service you wish to receive (see table below for details).
Title*	By default, the title will be set to the title of the service you choose.
Description	The description field will be filled out with a template, depending on the service you choose. Please provide a detailed description of the issue as it will help us to provide you with a fast reply.
Related cases	Here, you can link to your other cases if they are related to the current one.
Requester*	By default, this field will contain your username. **Do not change this**.
Contacts	Please enter the personal work email address for yourself and anyone else this case concerns. All contacts listed here will then receive updates when the case changes.
Responsible	After your case is received, a Netcompany employee will be assigned to solve it. Please **leave this blank** when creating the case.
Status	As your case is handled, it will change its state. Please **leave this at "10 – New"** when creating the case. When you have received a response to your request, but have added further questions on that case, then put the status back to "30 – Assigned". If the suggested solution did not work, please update status to "51 – Test not ok".

The service types relevant to onboarding are described in the table below. Do not use other service types than these.

Service types	Description
Notification about certificate details	Used for providing certificate details to the DMS Onboarding team for system-user creation as part of the onboarding sign-up process
Support issue	Used to report bugs in the system

4.1   Submitting a case

After filling out all relevant fields and clicking "Save", the case is then submitted to the DMS Onboarding team. You (the requester), as well as any email addresses written in the "Contacts" field, will then receive an email with a link to your case.

Dear Jesper TEST,

The DMS Onboarding team has received your case and will start working on it.

You will automatically receive e-mail notifications about the case when it is solved, or when we need further actions from you.
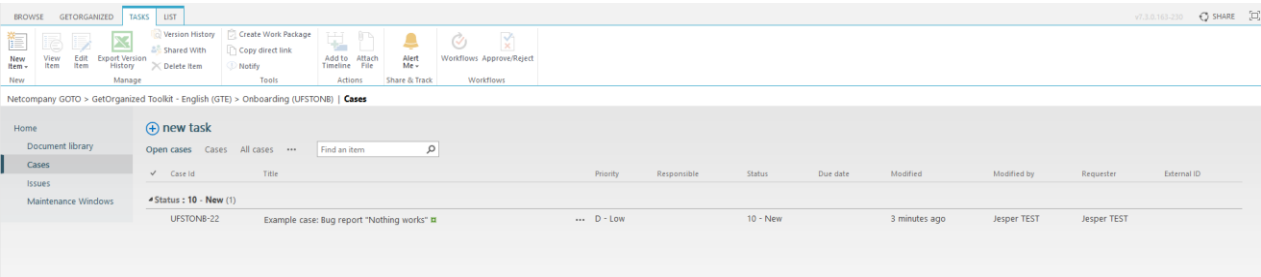
Link to the case - Example case: Bug report "Nothing works"

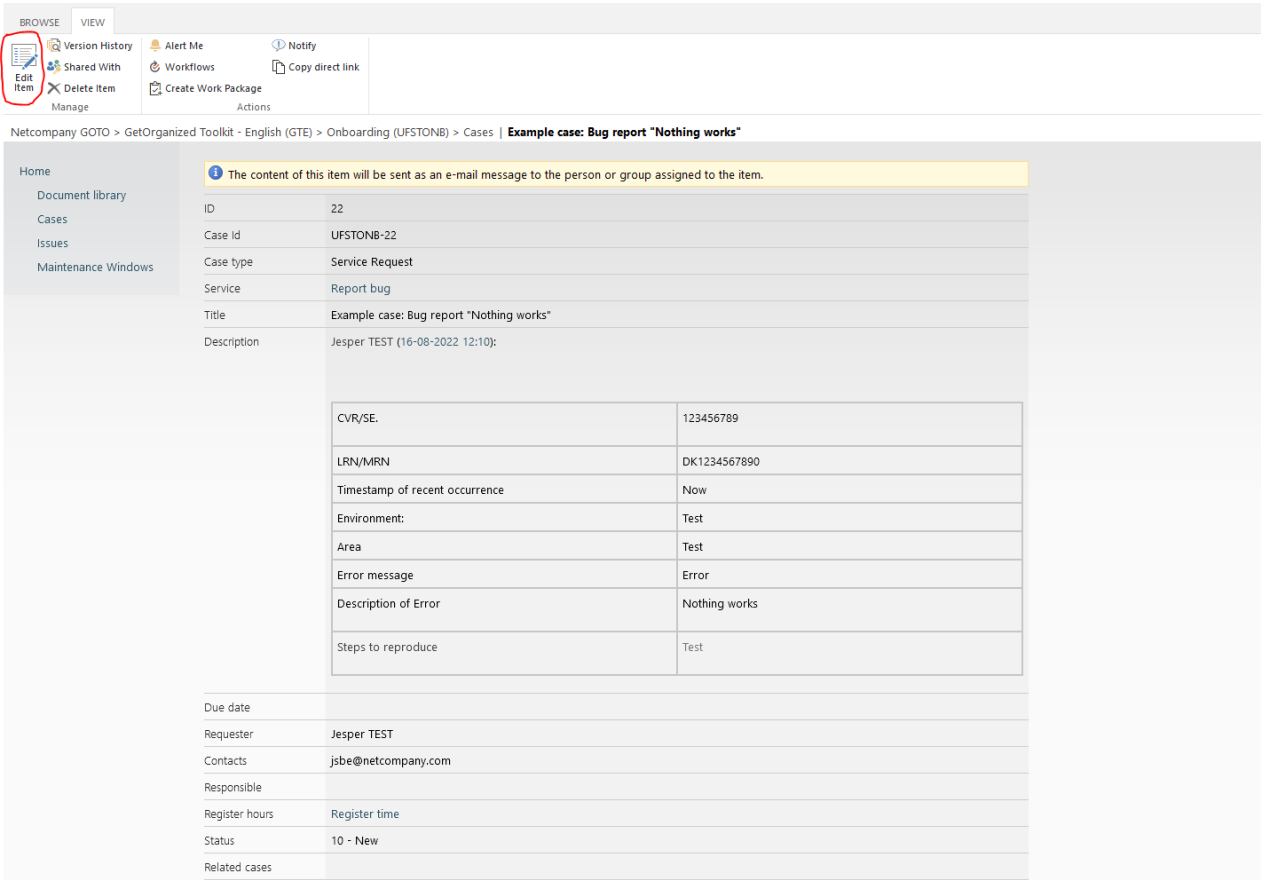*This an auto-generated message - please do not reply to this message per mail.*

Best regards,

Netcompany

Your case will now also be visible in the Cases page, as shown in the example case below.

If you want to make changes to the case you have submitted, you can click on it to inspect it, and then click the Edit Item button in the top left corner.

Note that when editing a case, you cannot change the original description. You can only add an additional description to the case. This feature ensures that no information gets deleted or edited by mistake.

4.2   Correspondence on a submitted case

When the DMS onboarding team has reviewed your case and submitted an answer, the status of the case will be changed, and you will consequently be notified by email. As an example, the case from the previous section could be rejected because it does not contain the necessary information to solve it. The Cases overview would then look like this

And clicking on the case shows the reply from the Onboarding team

Note that all correspondence with the Onboarding team happens entirely in the Description field, with each successive edit being added to the description field.

If you want to provide the requested information, press the Edit Item button, and provide the information in the Description field.

When editing the case, remember to change the status of the case to an appropriate value. In this particular example to "10 – New". The email notification you receive when your case changes status will inform you what status values are appropriate. Below is a table of the available case statuses with a description of each.

Status	Description
10 – New	means a newly created case in the Toolkit and is the default status when creating a case. A "New" case has not been interacted with by a DMS onboarding team employee yet.
30 – Assigned	means the case has been assigned to a DMS onboarding team employee who will be responsible for resolving the case
31 – Started	means a DMS onboarding team employee has started working on the case
40 – Migrated to test	means the solution to the case is awaiting testing from the requester, to ensure that the solution works on their end.
52 – Test not ok	means the solution to the case did not work on the requester's end.
80 – Awaiting customer	means the case is awaiting clarifications from the **requester**.

81 – Awaiting 3rd party	means the case is awaiting clarifications from **other than requester** or the DMS onboarding team. This may be any third party not directly involved in the original case, such as any of the systems that DMS integrates to.
90 – Closed	means the case is closed.
91 – Rejected	means the case was rejected for any number of valid reasons and is therefore closed.

4.3   Case list views

The case list can be sorted or filtered by using views. You can use the default ones provided by Toolkit as shown in the picture below (Open Cases and All Cases are most useful) or make your own views by clicking the three dots. If you cannot see your case in the case list, try to change the view to All cases, as the default view is Open cases, which does not show cases with certain statuses such as 91 - Rejected or 90 - Closed.

5 Issues

The issues list contains known issues which may affect performance or testing on the environment. You cannot create an issue yourself, but you can view the issues created by the Onboarding team.

6 Maintenance windows

Maintenance windows are planned periods when system will be maintained. You can expect the performance of the system to be affected during a maintenance window. Make sure that your error is not caused by a maintenance window before reporting a case.