NETCOMPANY

DMS ONBOARDING TOOLKIT USER GUIDE

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netcompany

Document history

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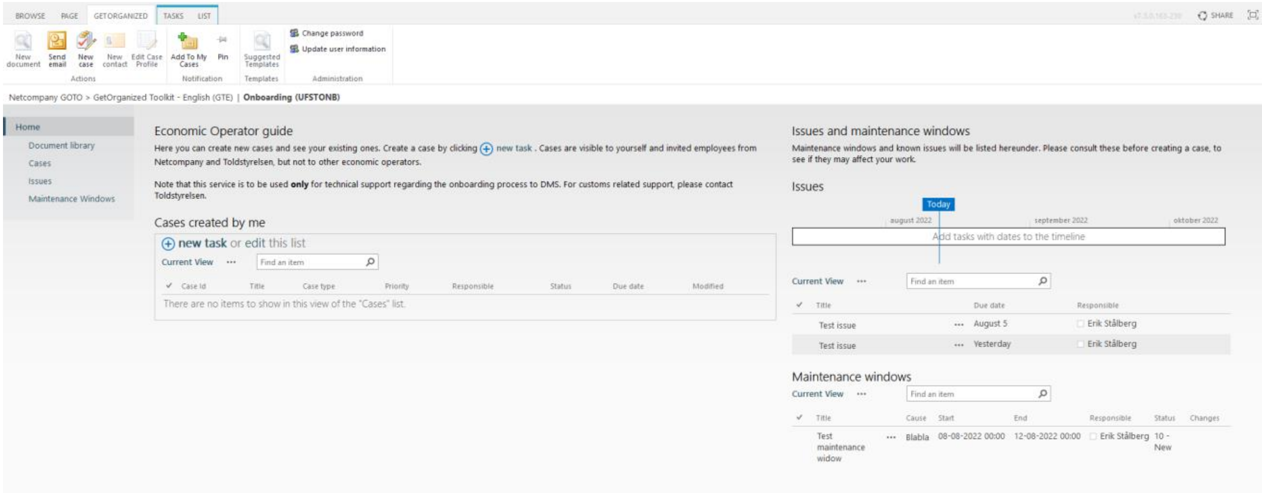
1 Introduction

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 Toldstyrelsen.

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.



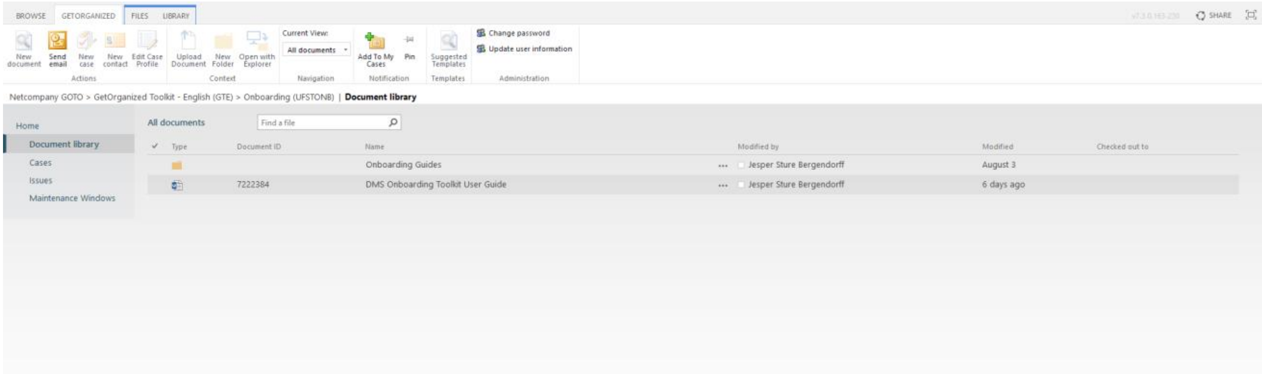
On the left, you have the quick access-menu. Here you find links to

- the homepage,
- the document library,
- your cases,
- issues
- maintenance windows.

In the middle of the homepage you find a brief guide to the Toolkit, and underneath it 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.

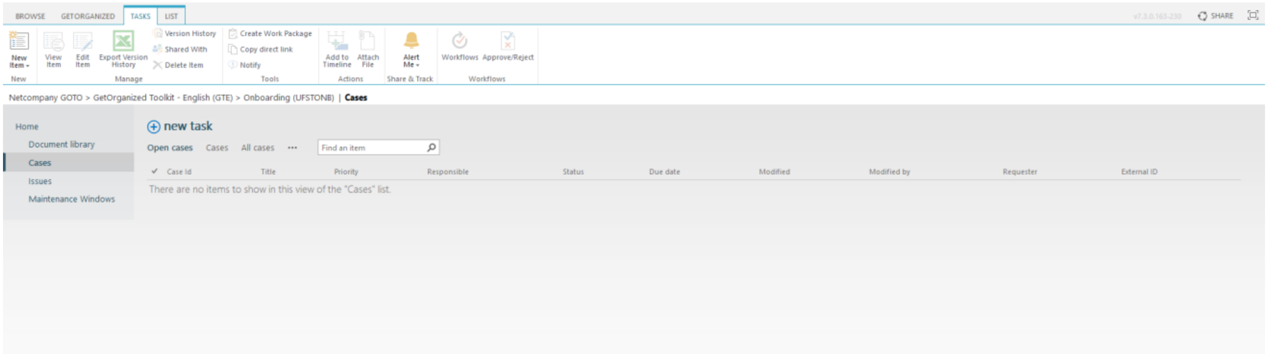
3 Document library

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

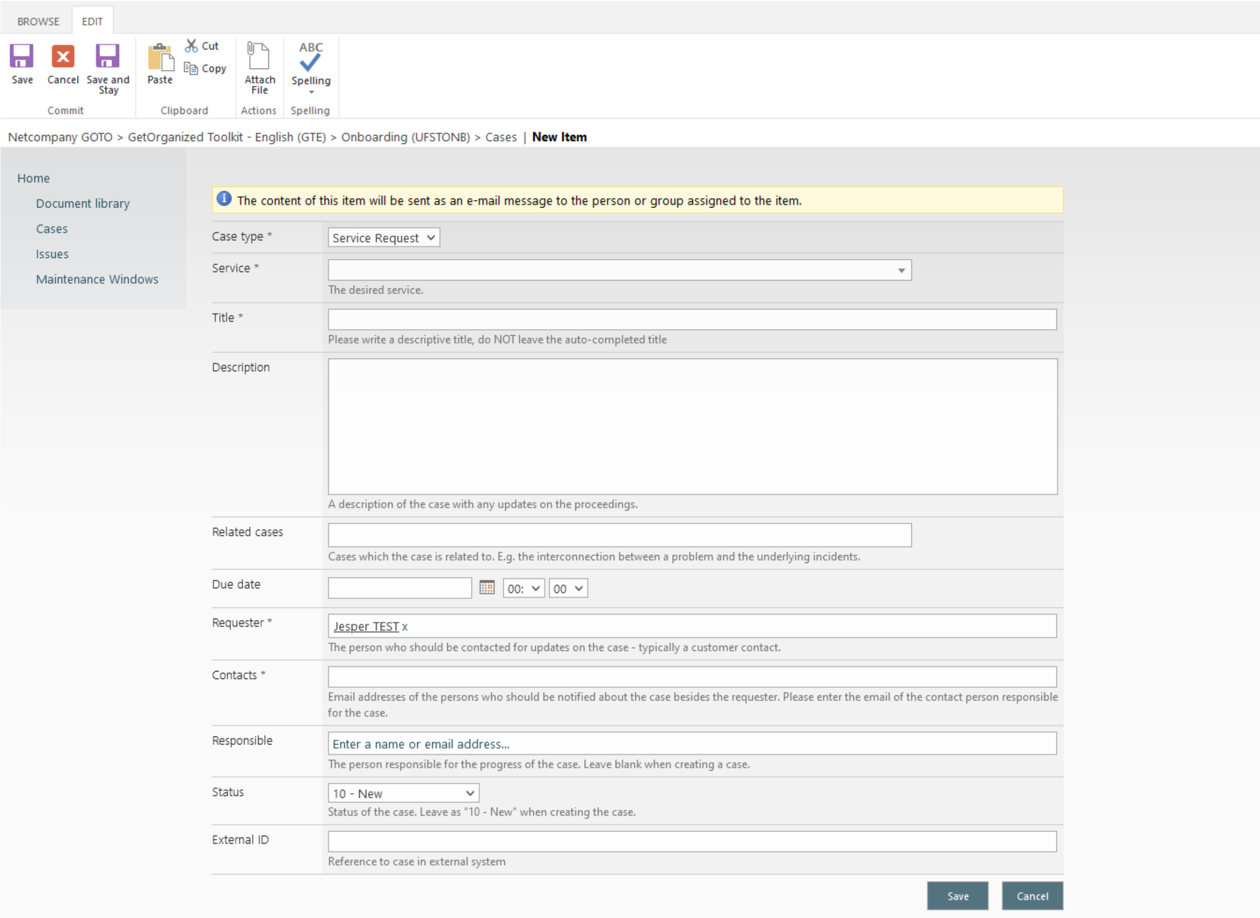


4 Cases

If neither the document library/GitHub, nor the issues or maintenance windows lists provide sufficient information to answer your inquiry, you can 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).

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. **Please change this and write your own, descriptive, title.**
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 satisfactory response to your request, please update status to “90-Closed”

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
Bug report	Used to report bugs in the system
Request assistance for troubleshooting	Used to request assistance in understanding documentation, processes and system functionality
Request test data	Used to request test data in order to test specific behavior

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.

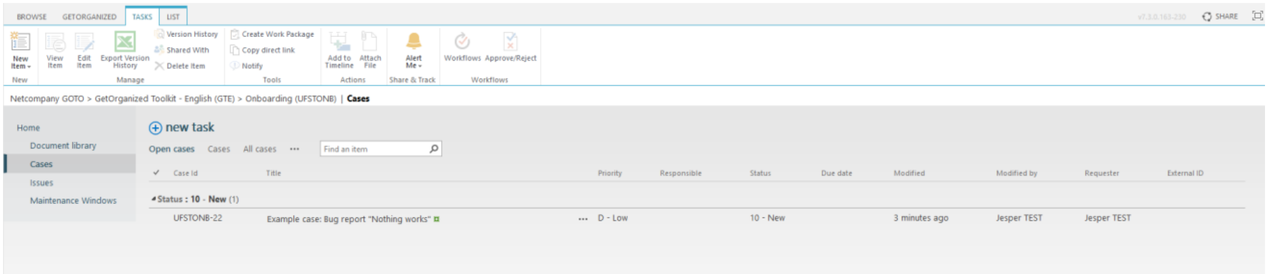
[Link to the case - Example case: Bug report "Nothing works"]

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

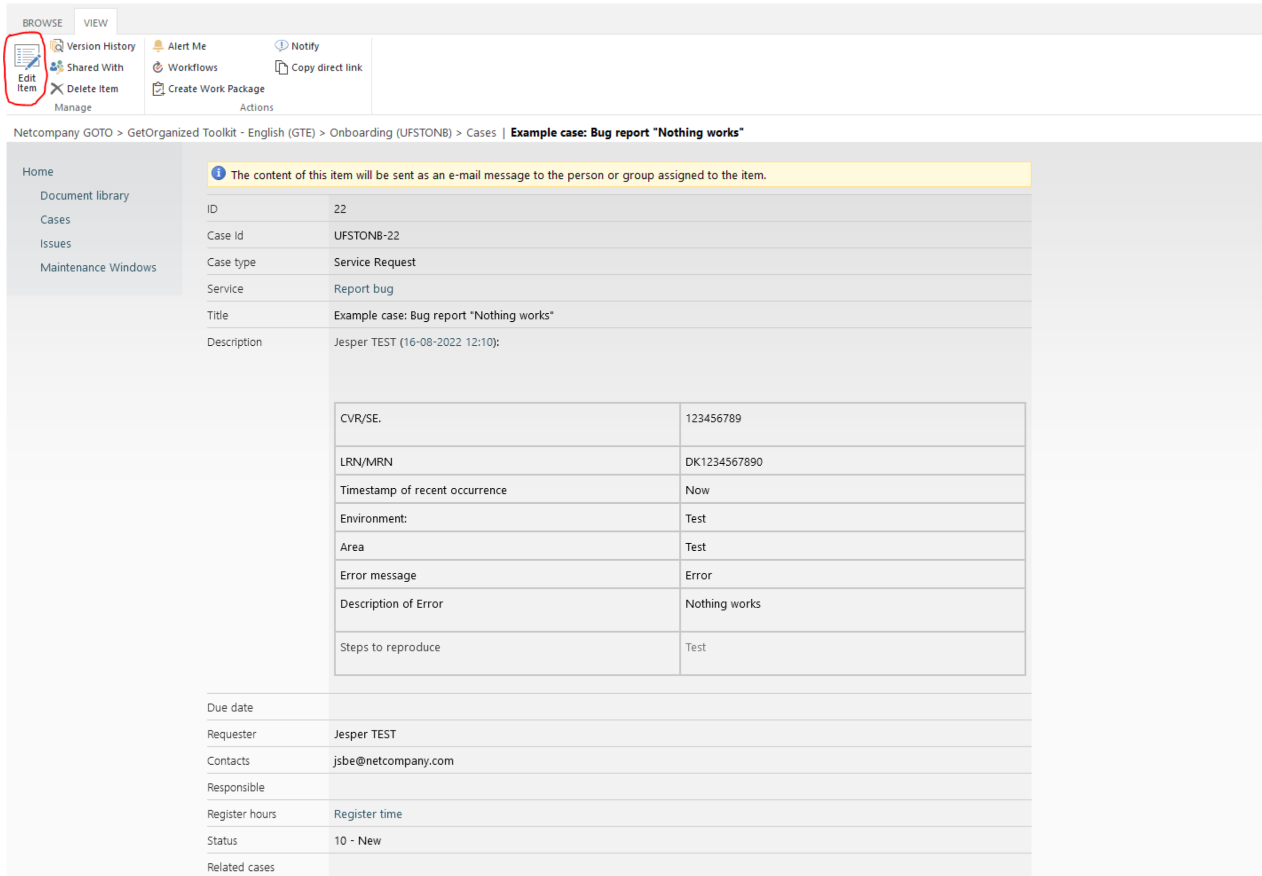
Best regards,

Netcompany

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



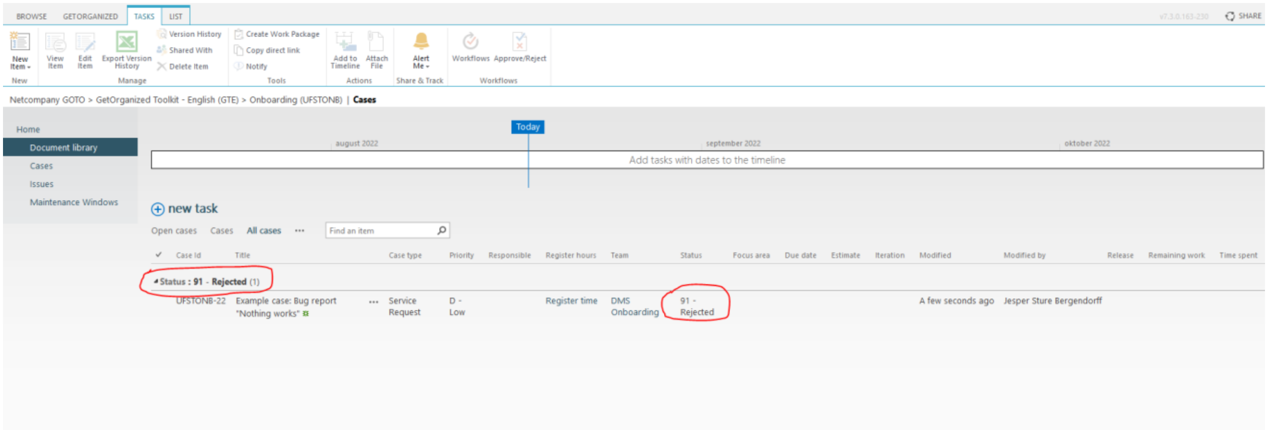
If you want to make changes to the case you have submitted, you can click on it to inspect it, and then click the Edit Item button in the top left corner.



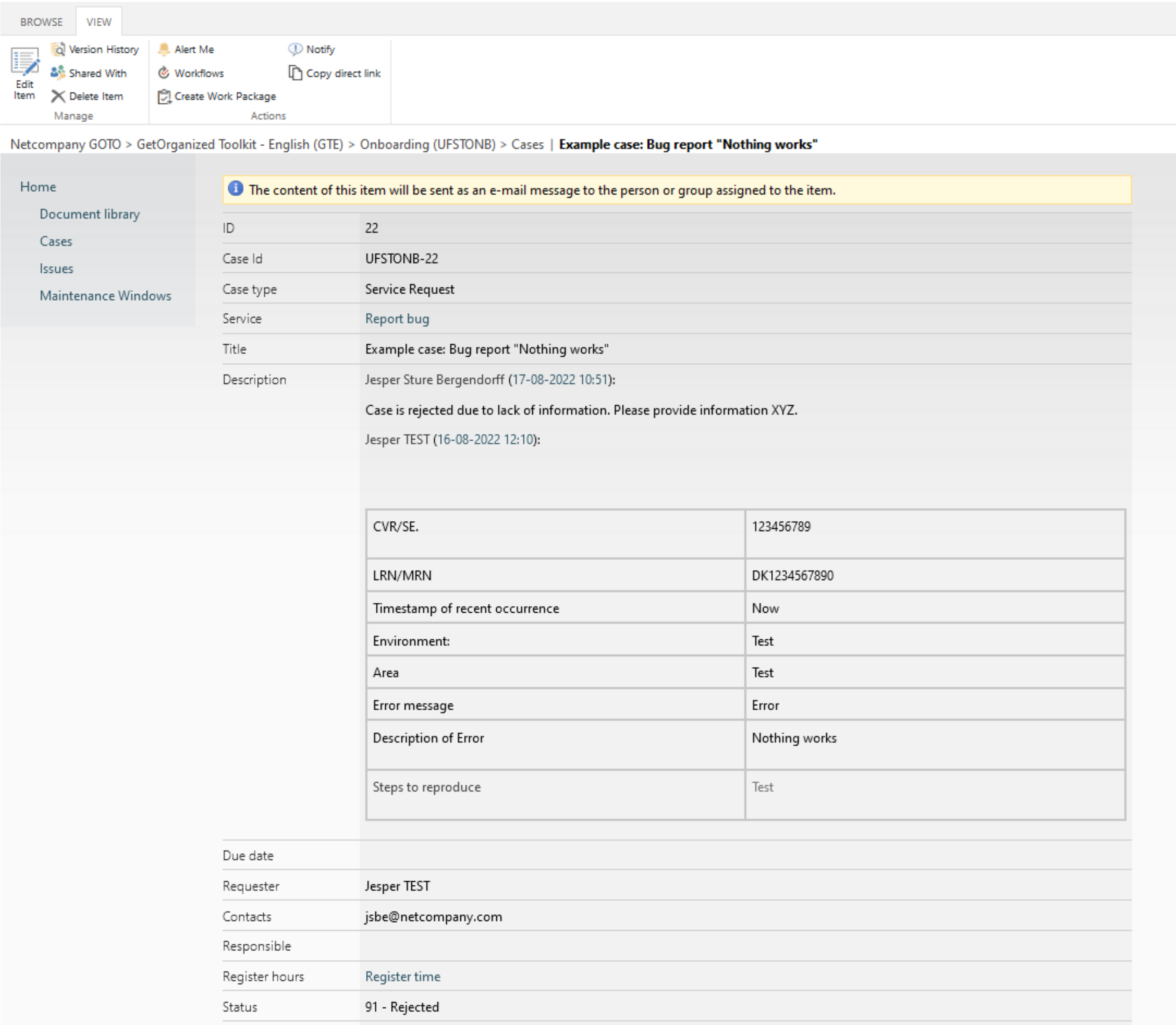
Note that when editing a case, you cannot change the original description. You can only add an additional description to the case. This feature ensures that no information gets deleted or edited by mistake.

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

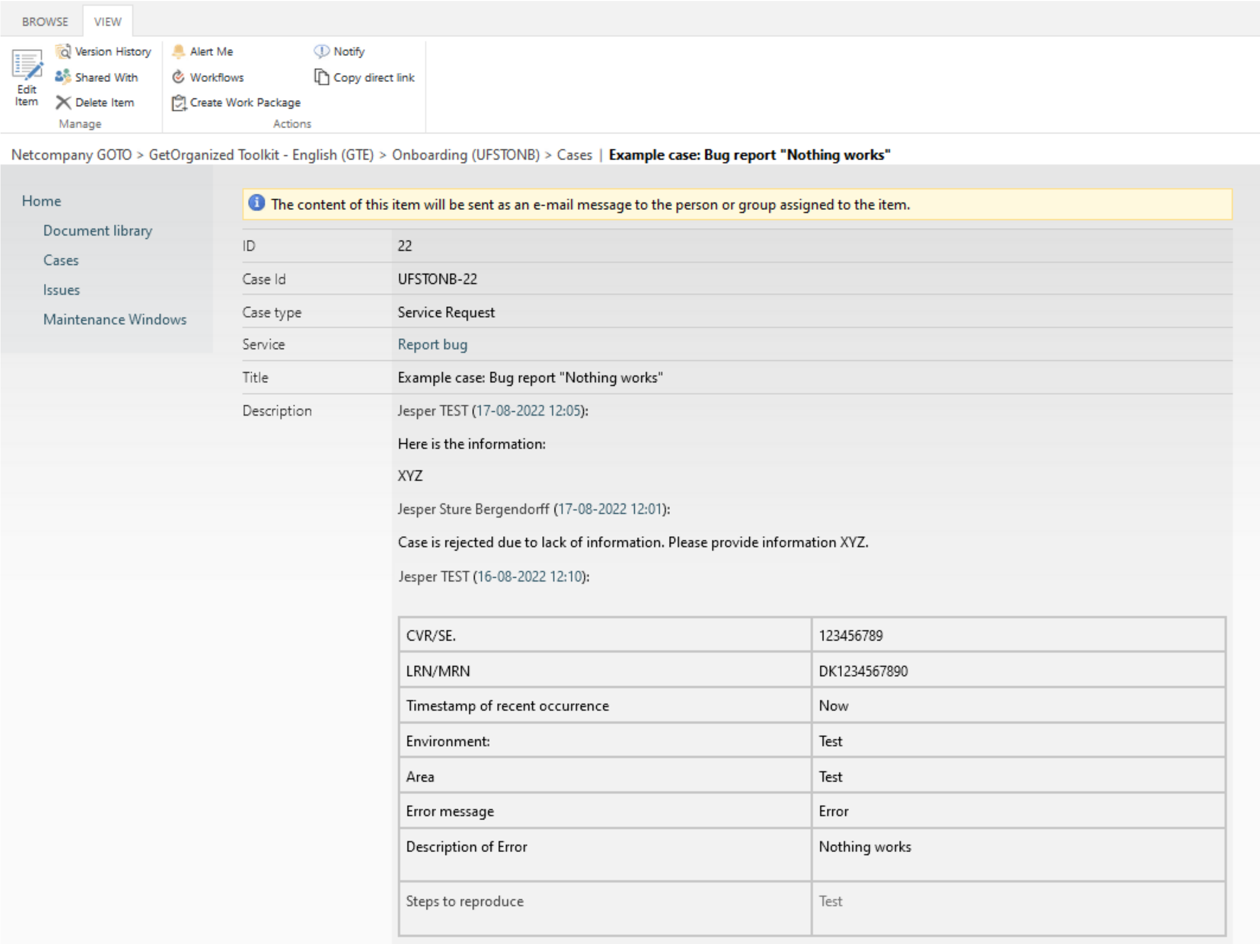


And clicking on the case shows the reply from the Onboarding team



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.



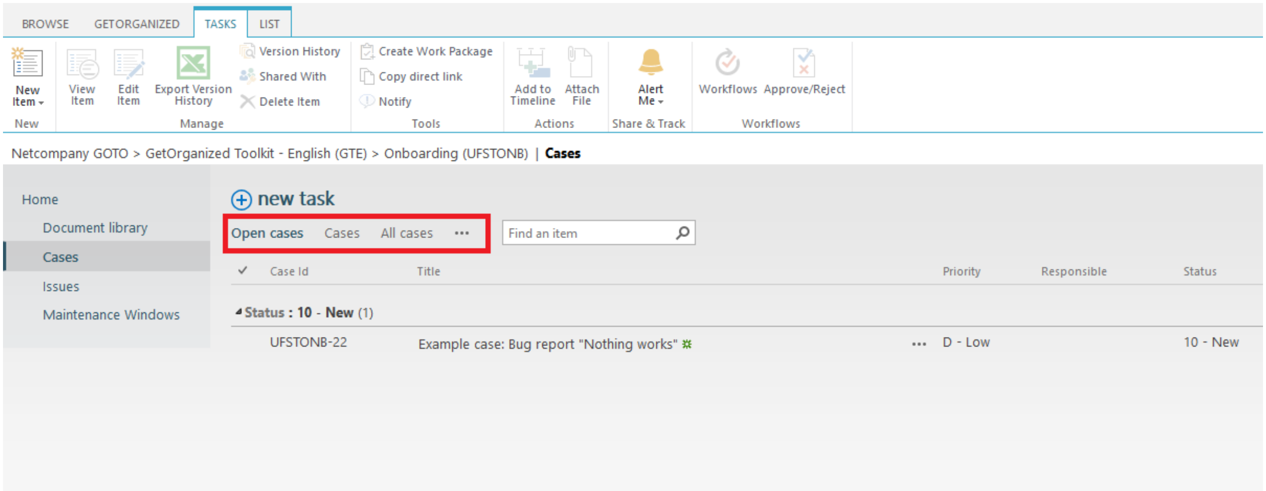
When editing the case, remember to change the status of the case to an appropriate value. In this particular example to "10 – New". The email notification you receive when your case changes status will inform you what status values are appropriate. Below is a table of the available case statuses with 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.
12 – Analysed	means the case has been opened by a DMS onboarding team employee and is in the process of being assigned to a relevant team member.
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.
60 – Solved	means the solution works on the requester's end, is deployed on the environment, and the case is awaiting final resolution from the requester.
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
90 – Closed	means the case is closed.
91 – Rejected	means the case was rejected for any number of valid reasons and is therefore closed.

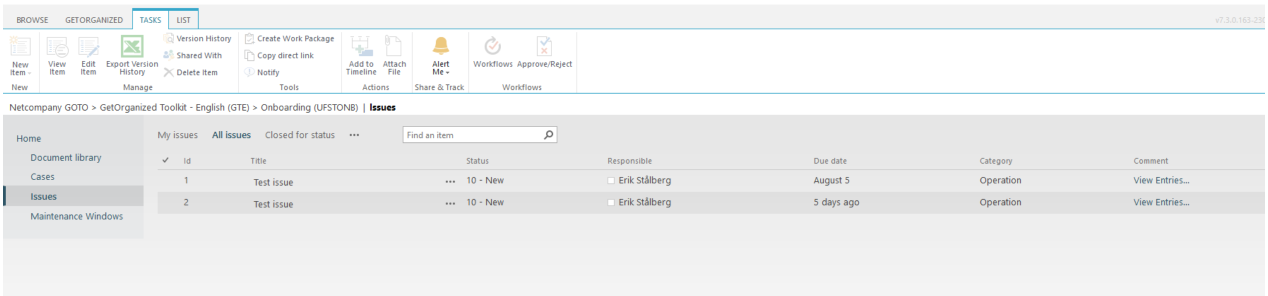
4.3 Case list views

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.