

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 TOLDST ServiceDesk.

## 1.1 Contact information

The Onboarding team can be contacted by writing an email to [dms-onboarding@ufst.dk](mailto: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.

The screenshot shows the DMS Onboarding Toolkit homepage. The left sidebar contains navigation links: Home, Document library, Cases, Issues, and Maintenance Windows. The main content area is divided into three sections:

- Toolkit information:**
  - Connectivity status:** A table showing the status of different environments.

Environment	Status
AS4	A few endpoints not reachable (see Issues)
UFE (SIT05)	No known issues
TFE	No known issues
  - Info for Economic Operator users:** A text block providing contact information for the onboarding team and instructions on how to create a case.
  - Cases created by me:** A table showing cases created by the user. The table is currently empty, with a message: "There are no items to show in this view of the 'Cases' list."
- Issues:** A section showing a timeline of issues. The timeline is currently empty, with a message: "There are no items to show in this view of the 'Issues' list."
- Maintenance windows:** A section showing a list of maintenance windows. The list is currently empty, with a message: "There are no items to show in this view of the 'Maintenance windows' list."

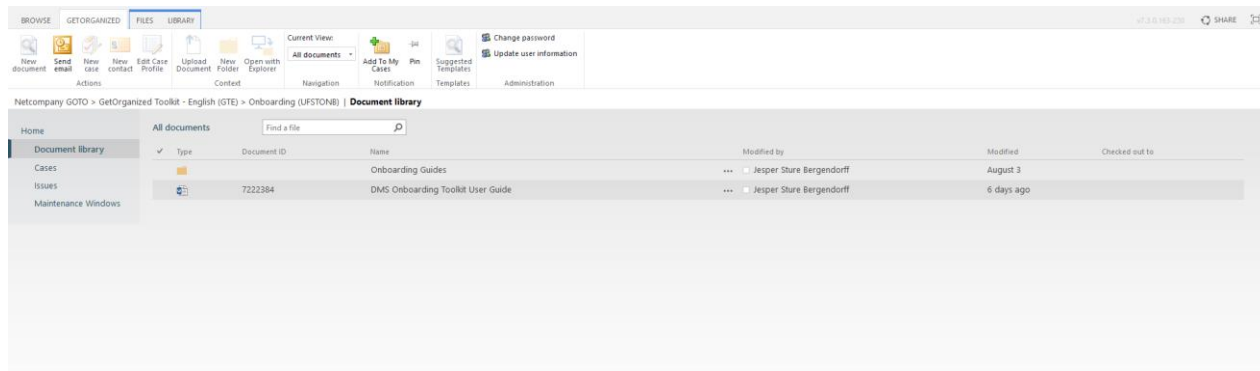
On the left, you have the quick access-menu. Here you find links to

- 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.

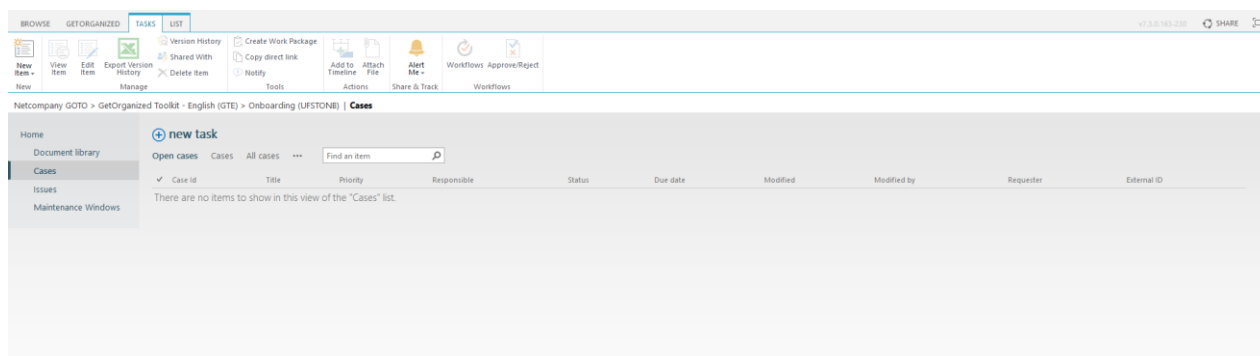
## 3 Document library

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.

BROWSEEDIT

Save

Cancel

Save and Stay

Paste

Cut

Copy

Attach File

ABC

Spelling

CommitClipboardActionsSpelling

Netcompany GOTO > GetOrganized Toolkit - English (GTE) > DMS Onboarding (UFSTONB2) > Cases | **New Item**

Home

Document library

Cases

Issues

Maintenance Windows

Case type \*

Service Request

Service \*

The desired standard service.

Title \*

Please write the relevant company name within the square brackets of the autotyped title

Description

A description of the case with any updates on the proceedings.

Team \*

DMS Onboarding

The team responsible for the case.

Responsible

Enter a name or email address...

The person responsible for the progress of the case.

Status \*

10 - New

Status of the case. Leave as "10 - New" when starting a case.

Requester

Jesper TEST x

The creator of this case. The user entered here will receive e-mail updates when the case is updated.

Contacts

Email addresses of the persons who should be notified about the case besides the requester. Semi-colon separated with no spaces.

Related cases

Cases which the case is related to. E.g. the interconnection between a problem and the underlying incidents.

External ID

Reference to case in Remedy or other external system

Save

Cancel

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).

BROWSEEDIT

Save

Cancel

Save and Stay

Paste

Cut

Copy

Attach File

ABC

Spelling

CommitClipboardActionsSpelling

Netcompany GOTO > GetOrganized Toolkit - English (GTE) > Onboarding (UFSTONB) > Cases | **New Item**

Home

Document library

Cases

Issues

Maintenance Windows

The content of this item will be sent as an e-mail message to the person or group assigned to the item.

Case type \*

Service Request

Service \*

The desired service.

Title \*

Please write a descriptive title, do NOT leave the auto-completed title

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]”

BROWSE

EDIT

Save

Cancel

Save and Stay

Paste

Cut

Copy

Attach File

Spelling

Commit

Clipboard

Actions

Spelling

Netcompany GOTO > GetOrganized Toolkit - English (GTE) > DMS Onboarding (UFSTONB2) > Cases | **New Item**

Home

Document library

Cases

Issues

Maintenance Windows

Case type \*

Service Request ▾

Service \*

DMS S2S: support issue [insert company name] ▾

The desired standard service.

Title \*

DMS S2S: support issue [insert company name]

Please write the relevant company name within the square brackets of the autotyped title

Description

CVR/SE.	
LRN/MRN	
Timestamp of recent occurrence	
Environment	
Area	
Error message	
Description of Error	
Steps to reproduce	

Additional comments:

A description of the case with any updates on the proceedings.

Team \*

DMS S2S Onboarding ▾

The team responsible for the case.

Responsible

Enter a name or email address...

Leave this field blank when creating a new case. It specifies which Onboarding team member is responsible for the case.

Status \*

10 - New ▾

Status of the case. Leave as "10 - New" when starting a case.

Requester

Jesper TEST x

Do not change this field. This field specifies the creator of this case, which will receive e-mail updates when the case is updated.

Contacts

Email addresses of the persons who should be notified about the case besides the requester. Semi-colon separated with no spaces.

Related cases

Cases which the case is related to. E.g. the interconnection between a problem and the underlying incidents.

External ID

Reference to case in Remedy or other external system

Save

Cancel

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. <b>Do not change this.</b>
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 <b>leave this blank</b> when creating the case.
Status	As your case is handled, it will change its state. Please <b>leave this at "10 – New"</b> 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.

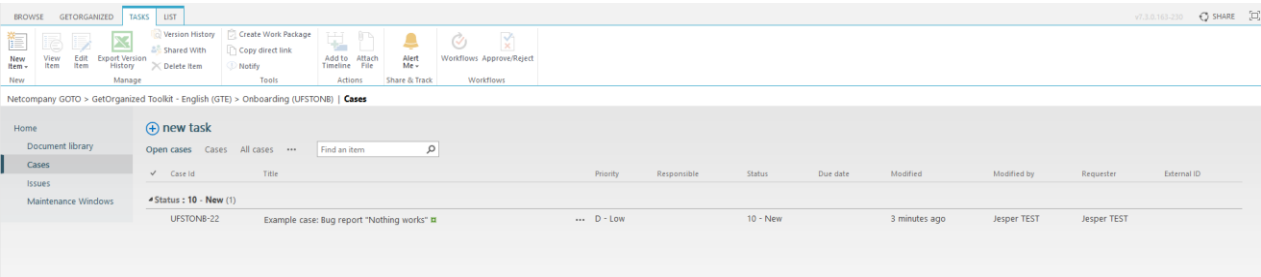
[Link to the case - Example case: Bug report "Nothing works"](#)

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

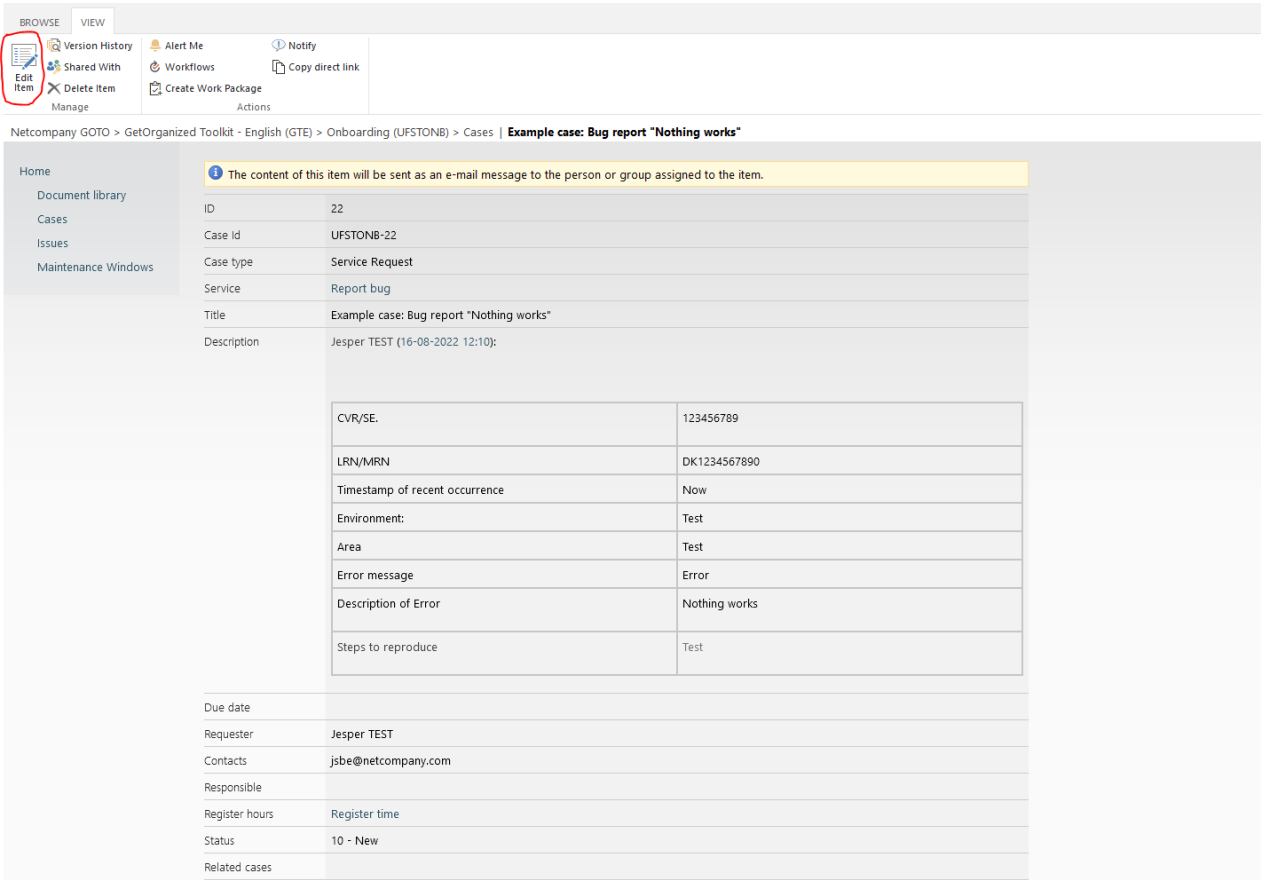
Best regards,

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

BROWSE

GET ORGANIZED

TASKS

LIST

New Item +

View Item

Edit Item

Export Version History

Version History

Share With

Delete Item

Manage

Create Work Package

Copy direct link

Notify

Tools

Add to Timeline

Attach File

Alert Me +

Share & Track

Workflows

Approve/Reject

Workflows

Netcompany GOTO > GetOrganized Toolkit - English (GTE) > Onboarding (UFSTONB) | **Cases**

Home

Document library

Cases

Issues

Maintenance Windows

Today

august 2022

september 2022

oktober 2022

Add tasks with dates to the timeline

+ new task

Open cases Cases All cases ...

Find an item

✓	Case id	Title	Case type	Priority	Responsible	Register hours	Team	Status	Focus area	Due date	Estimate	Iteration	Modified	Modified by	Release	Remaining work	Time spent
	* Status : 91 - Rejected (1)																
	UFSTONB-02	Example case: Bug report "Nothing works"	Service Request	D - Low		Register time	DMS Onboarding	91 - Rejected							A few seconds ago	Jesper Sture Bergendoff	

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

BROWSE

VIEW

Edit Item
 Version History
 Shared With
 Delete Item
 Manage

Alert Me
 Workflows
 Create Work Package

Notify
 Copy direct link

Actions

Netcompany GOTO > GetOrganized Toolkit - English (GTE) > Onboarding (UFSTONB) > Cases | **Example case: Bug report "Nothing works"**

Home
 

Document library
 Cases
 Issues
 Maintenance Windows

The content of this item will be sent as an e-mail message to the person or group assigned to the item.

ID	22																
Case Id	UFSTONB-22																
Case type	Service Request																
Service	Report bug																
Title	Example case: Bug report "Nothing works"																
Description	<p>Jesper Sture Bergendorff (17-08-2022 10:51):</p> <p>Case is rejected due to lack of information. Please provide information XYZ.</p> <p>Jesper TEST (16-08-2022 12:10):</p> <table> <tr> <td>CVR/SE.</td> <td>123456789</td> </tr> <tr> <td>LRN/MRN</td> <td>DK1234567890</td> </tr> <tr> <td>Timestamp of recent occurrence</td> <td>Now</td> </tr> <tr> <td>Environment:</td> <td>Test</td> </tr> <tr> <td>Area</td> <td>Test</td> </tr> <tr> <td>Error message</td> <td>Error</td> </tr> <tr> <td>Description of Error</td> <td>Nothing works</td> </tr> <tr> <td>Steps to reproduce</td> <td>Test</td> </tr> </table>	CVR/SE.	123456789	LRN/MRN	DK1234567890	Timestamp of recent occurrence	Now	Environment:	Test	Area	Test	Error message	Error	Description of Error	Nothing works	Steps to reproduce	Test
CVR/SE.	123456789																
LRN/MRN	DK1234567890																
Timestamp of recent occurrence	Now																
Environment:	Test																
Area	Test																
Error message	Error																
Description of Error	Nothing works																
Steps to reproduce	Test																
Due date																	
Requester	Jesper TEST																
Contacts																	
Responsible																	
Register hours	Register time																
Status	91 - Rejected																

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.

BROWSE

VIEW

Version History

Alert Me

Workflows

Create Work Package

Notify

Copy direct link

Edit Item

Delete Item

Manage

Actions

Netcompany GOTO > GetOrganized Toolkit - English (GTE) > Onboarding (UFSTONB) > Cases | **Example case: Bug report "Nothing works"**

Home

Document library

Cases

Issues

Maintenance Windows

The content of this item will be sent as an e-mail message to the person or group assigned to the item.

ID	22																
Case Id	UFSTONB-22																
Case type	Service Request																
Service	Report bug																
Title	Example case: Bug report "Nothing works"																
Description	<p>Jesper TEST (17-08-2022 12:05):</p> <p>Here is the information:</p> <p>XYZ</p> <p>Jesper Sture Bergendorff (17-08-2022 12:01):</p> <p>Case is rejected due to lack of information. Please provide information XYZ.</p> <p>Jesper TEST (16-08-2022 12:10):</p> <table> <tr> <td>CVR/SE.</td> <td>123456789</td> </tr> <tr> <td>LRN/MRN</td> <td>DK1234567890</td> </tr> <tr> <td>Timestamp of recent occurrence</td> <td>Now</td> </tr> <tr> <td>Environment:</td> <td>Test</td> </tr> <tr> <td>Area</td> <td>Test</td> </tr> <tr> <td>Error message</td> <td>Error</td> </tr> <tr> <td>Description of Error</td> <td>Nothing works</td> </tr> <tr> <td>Steps to reproduce</td> <td>Test</td> </tr> </table>	CVR/SE.	123456789	LRN/MRN	DK1234567890	Timestamp of recent occurrence	Now	Environment:	Test	Area	Test	Error message	Error	Description of Error	Nothing works	Steps to reproduce	Test
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LRN/MRN	DK1234567890																
Timestamp of recent occurrence	Now																
Environment:	Test																
Area	Test																
Error message	Error																
Description of Error	Nothing works																
Steps to reproduce	Test																

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
<b>10 – New</b>	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.
<b>30 – Assigned</b>	means the case has been assigned to a DMS onboarding team employee who will be responsible for resolving the case
<b>31 – Started</b>	means a DMS onboarding team employee has started working on the case
<b>40 – Migrated to test</b>	means the solution to the case is awaiting testing from the requester, to ensure that the solution works on their end.
<b>52 – Test not ok</b>	means the solution to the case did not work on the requester's end.
<b>80 – Awaiting customer</b>	means the case is awaiting clarifications from the <b>requester</b> .

<b>81 – Awaiting 3rd party</b>	means the case is awaiting clarifications from <b>other than requester</b> 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.
<b>90 – Closed</b>	means the case is closed.
<b>91 – Rejected</b>	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.

Netcompany GOTO > GetOrganized Toolkit - English (GTE) > Onboarding (UFSTONB) | **Cases**

Home  
Document library  
**Cases**  
Issues  
Maintenance Windows

+ new task  
Open cases Cases All cases ... Find an item

Case Id	Title	Priority	Responsible	Status
Status: 10 - New (1)				
UFSTONB-22	Example case: Bug report "Nothing works"	D - Low		10 - New

## 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.

Netcompany GOTO > GetOrganized Toolkit - English (GTE) > Onboarding (UFSTONB) | **Issues**

Home  
Document library  
Cases  
**Issues**  
Maintenance Windows

My issues All issues Closed for status ... Find an item

Id	Title	Status	Responsible	Due date	Category	Comment
1	Test issue	10 - New	Erik Stålberg	August 5	Operation	View Entries...
2	Test issue	10 - New	Erik Stålberg	5 days ago	Operation	View Entries...

## 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.

BROWSE

GETORGANIZED

ITEMS

LIST

New Item

New Folder

View Item

Set Item

Shared With

Delete Item

Version History

Attach File

Notify

Copy direct link

Alert

Share & Track

Workflow

Approve/Reject

New

Manage

Actions

Workflow

Netcompany GOTO > GetOrganized Toolkit - English (STE) > Onboarding (LIFSTONB) | Maintenance windows

Home

Document library

Cases

Issues

Maintenance Windows

Active maintenance windows

All maintenance windows

Calendar

Find an item

✓ Title	Cause	Start	End	Responsible	Status	Changes
Test maintenance widow	Blåbå	08-08-2022 00:00	12-08-2022 00:00	Erik Ståhlberg	10 - New	