



# USER MANUAL

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## ONLINE SERVICE DESK SYSTEM

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EEI CORPORATION ONLINE SERVICE DESK SYSTEM

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EEI CORPORATION  
IT DEPARTMENT



CREATION DATE:  
MARCH 2018

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# EEI CORPORATION ONLINE SERVICE DESK SYSTEM USER MANUAL

## ABOUT THIS DOCUMENT

This user manual contains all the necessary information for the requestors to make full use of the Service Desk System. This also includes a description of the system functionalities and step-by-step procedures for system access and use. A glossary of terms as well as screen images are provided for better visualization of the system's functionalities.

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# I. GETTING STARTED

## A. What is this system?

EEl Corporation's Online Service Desk System serves as the main point of contact between all users outside of the IT department and the IT Service Team as the service provider. This platform is a ticketing system which allows proper documentation of all user requests for the benefit of all parties involved.

## B. What are the ticket categories?

### Technicals



#### TECHNICALS TICKETS

Tickets concerning hardware issues such as monitor, CPU, printer, scanner, keyboard, etc.

### Access



#### ACCESS TICKETS

Tickets concerning application access, password, account deactivation, etc.

### Network



#### NETWORK TICKETS

Tickets concerning network access and network hardware issues such as network outage, WiFi connection, etc.

## C. What are the different ticket statuses?

### 1. New

- A **new** ticket is a newly submitted ticket which has neither been approved (for user access tickets) nor assigned a severity level and a category.

### 2. Checked

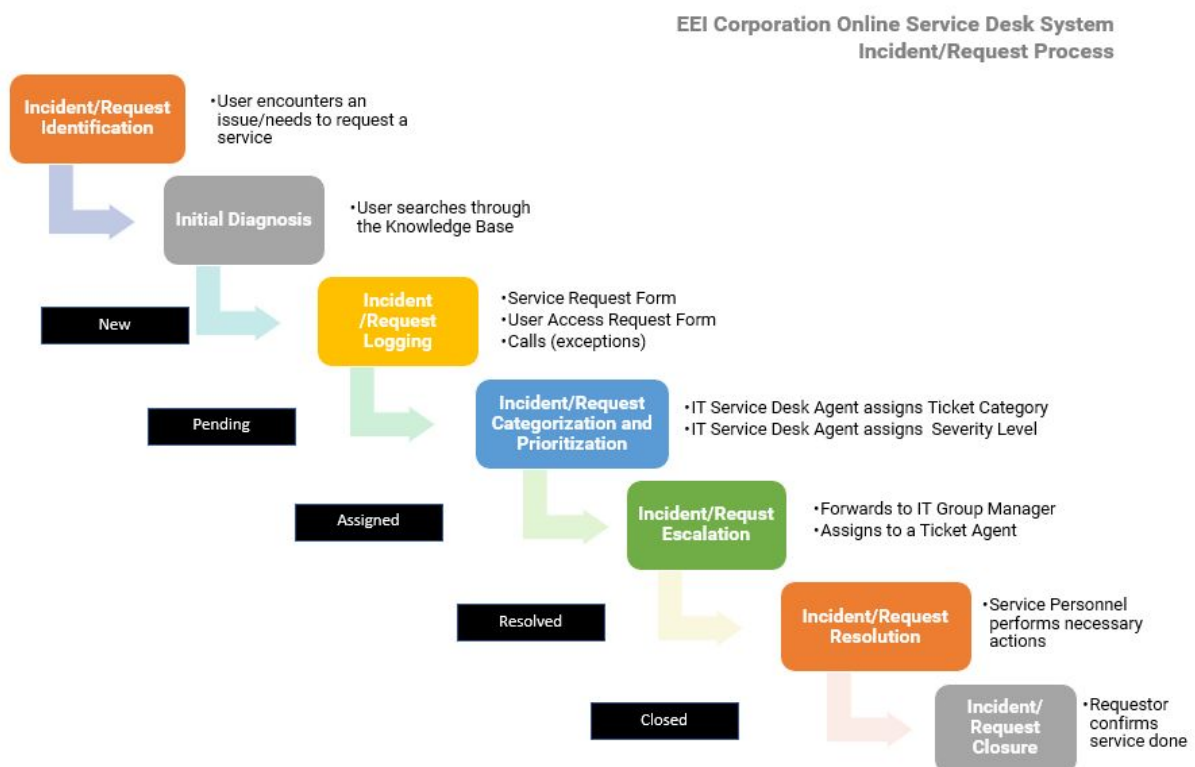
- A **checked** ticket is a ticket which has been reviewed by the designated checker. This is only applicable to user access tickets

### 3. Approved

- An **approved** ticket is is a ticket which has been reviewed by the designated approver. This is only applicable to user access tickets

4. Rejected
  - A **rejected** ticket is a ticket which has been reviewed by a checker or approver but has not passed the said reviewing
5. Pending
  - A **pending** ticket is a ticket which has been assigned a severity level and a category
6. Assigned
  - An **assigned** ticket is a ticket which the respective IT group manager has assigned to a specific ticket agent (technician/network engineer)
7. Resolved
  - A **resolved** ticket is a ticket which the ticket agent assigned has successfully
8. Closed
  - A **closed** ticket is a ticket that has been resolved and confirmed by the requestor. This indicates that no further actions can be taken with the ticket.

## D. What will be the general process with this system?



## E. Glossary of Terms

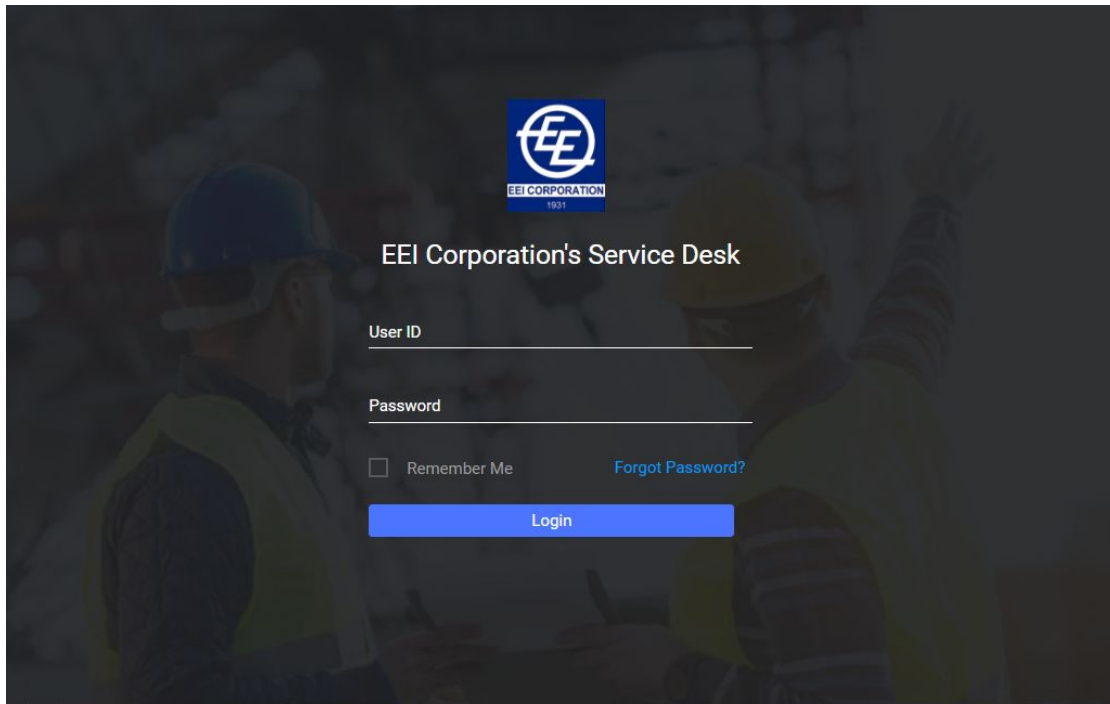
### Ticket

An electronic documentation of a concern or an issue

<b>Service Ticket</b>	A ticket for technicians concerns including: printer, hardware, scanner, mouse, keyboard among others
<b>User Access Ticket</b>	A ticket for application or network access; includes the signatures of the approver (required for all) and checker (optional)
<b>Ticket Agent</b>	The service team member assigned to resolve a ticket
<b>Checker</b>	<p>The assigned person to check the ticket details before the ticket is forwarded to the approver.</p> <p>Usually applicable for projects</p>
<b>Approver</b>	<p>The assigned approver of a user access ticket after it has been checked by the checker (if there is).</p> <p>Usually the project manager or the direct supervisor of the employee.</p>
<b>Open Ticket</b>	A general term which refers to tickets that have the status of: Pending, Assigned and Resolved.
<b>Closed Ticket</b>	Refers to tickets that are already closed.

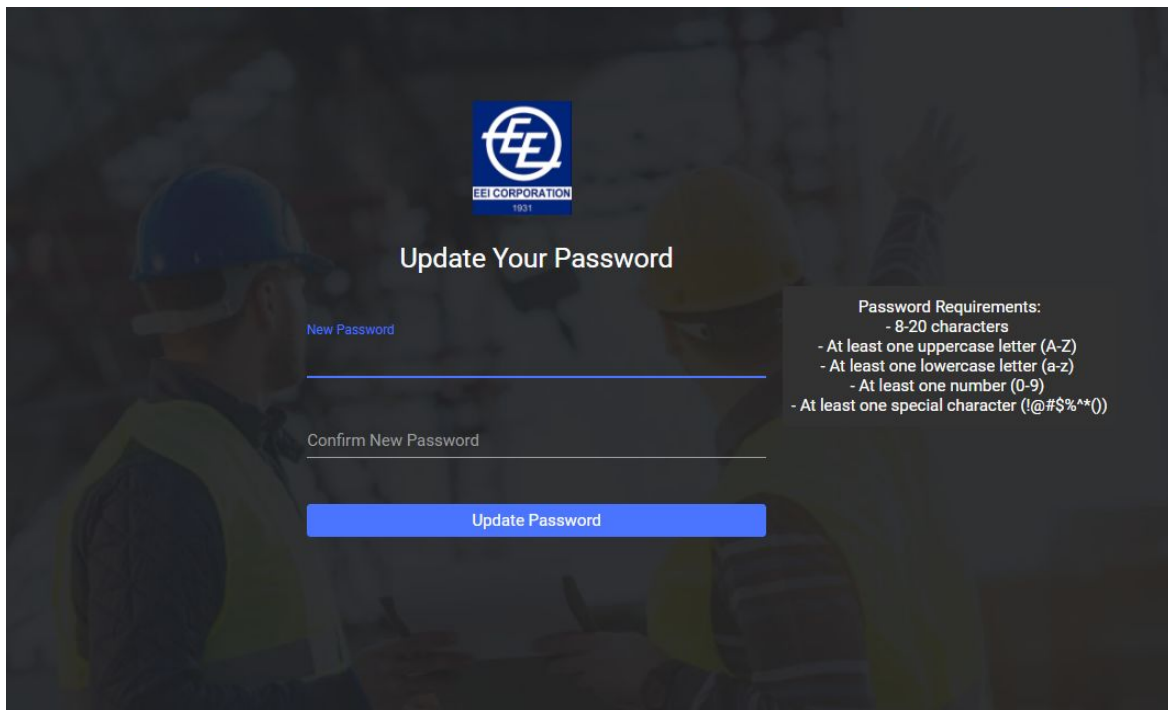
## II. GENERAL


### A. Log In



1. Enter your **official EEI user id** and **password**
  - a. ***What is my official EEI user id?***
    - i. Your official user id is the first letter of your first name and your full last name (*or your email handle **without** @eei.com.ph*)
    - ii. Example:
      1. Name: Juan B. Dela Cruz
      2. Username: jbdelacruz
2. Click “**Login**” to proceed

## B. Update Password





### Update Your Password

New Password

Confirm New Password

Update Password

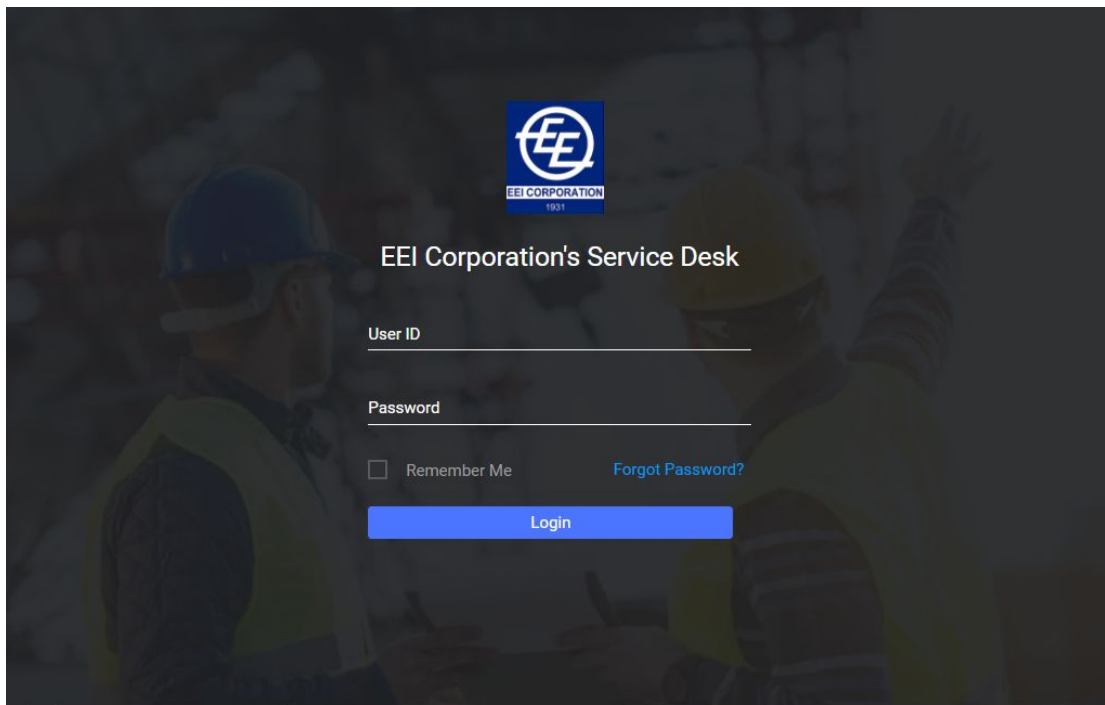
**Password Requirements:**

- 8-20 characters
- At least one uppercase letter (A-Z)
- At least one lowercase letter (a-z)
- At least one number (0-9)
- At least one special character (!@#%\*^&\*)

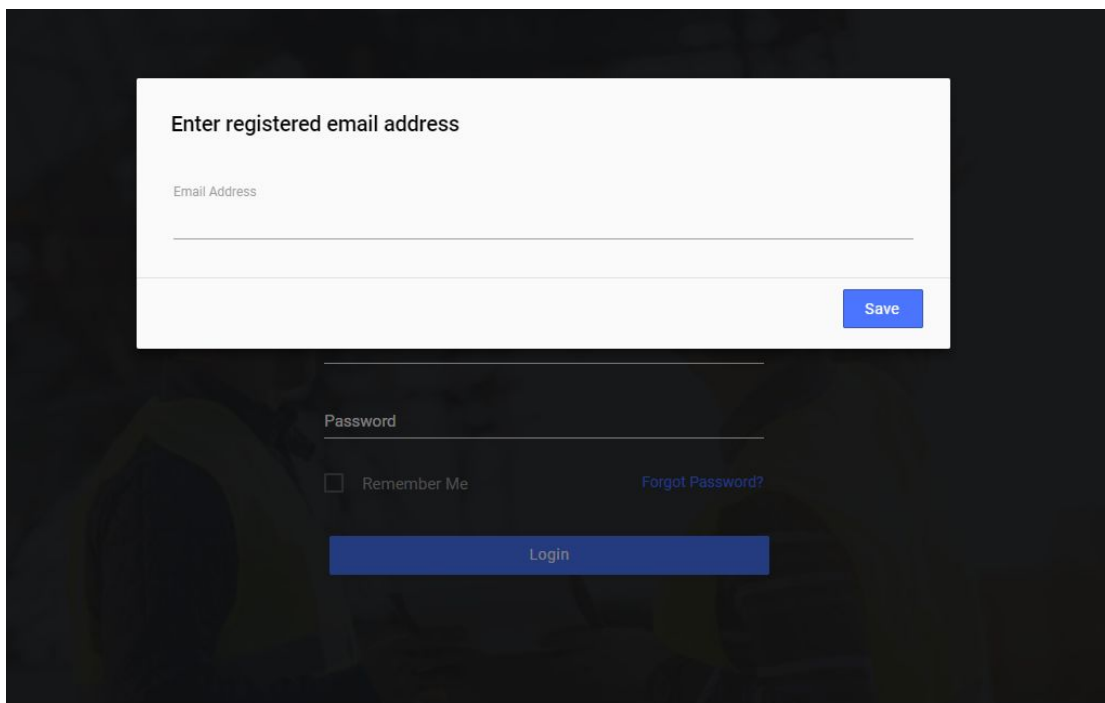
1. On your first login, you will be **required** to **change** your password
2. Password requirements are as follows:
  - a. 8-20 characters
  - b. At least one uppercase letter (A-Z)
  - c. At least one lowercase letter (a-z)
  - d. At least one number (0-9)
  - e. At least one special character [!@#%\*^&\*]
3. Retype the password you first entered to confirm
4. Click “**Update Password**” to proceed



## C. Forgot Password

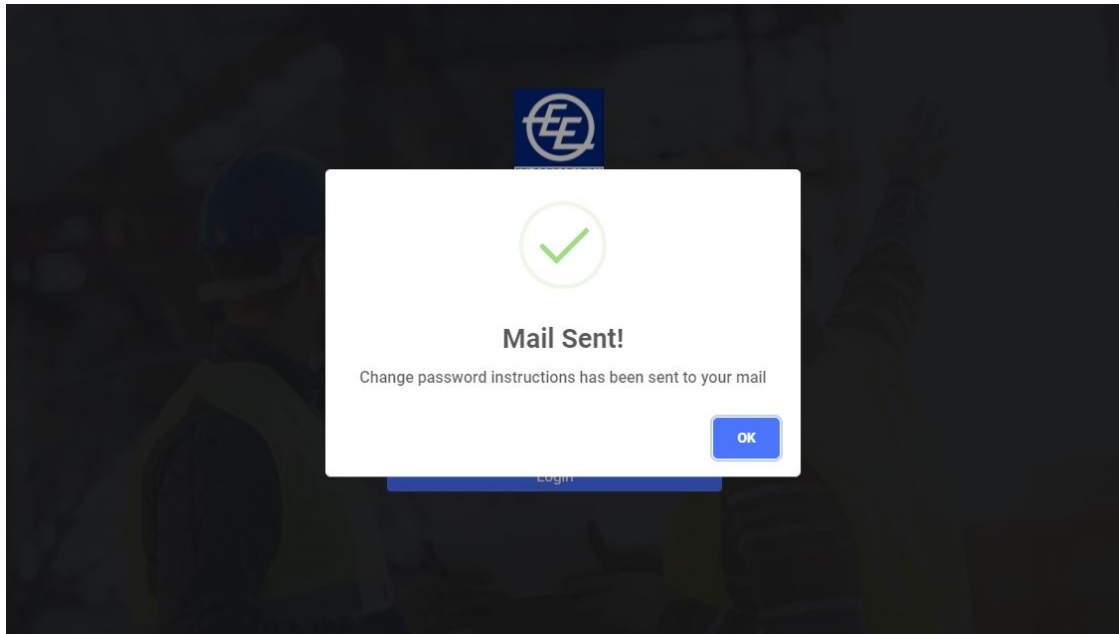


1. On the login page, click **“Forgot Password”** link above the login button



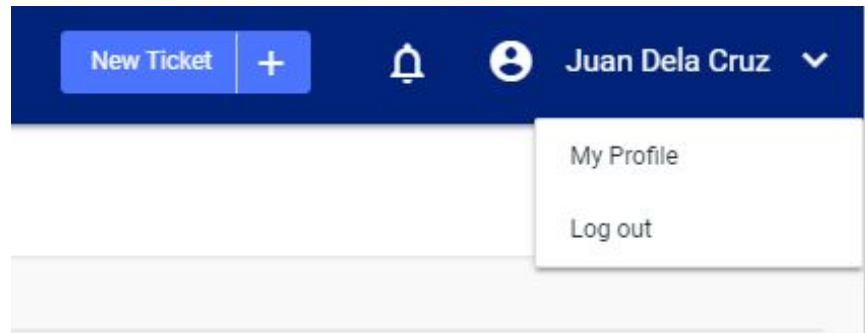
2. Enter your registered EEI e-mail address

3. Click **“Save”**
4. An e-mail will be sent to the e-mail address you entered for instructions on resetting your password.

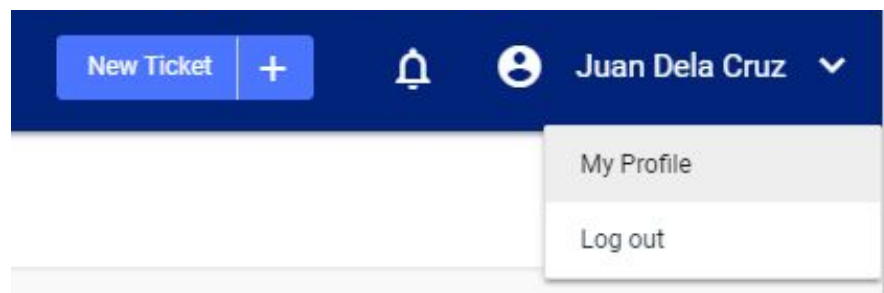


## D. My Profile

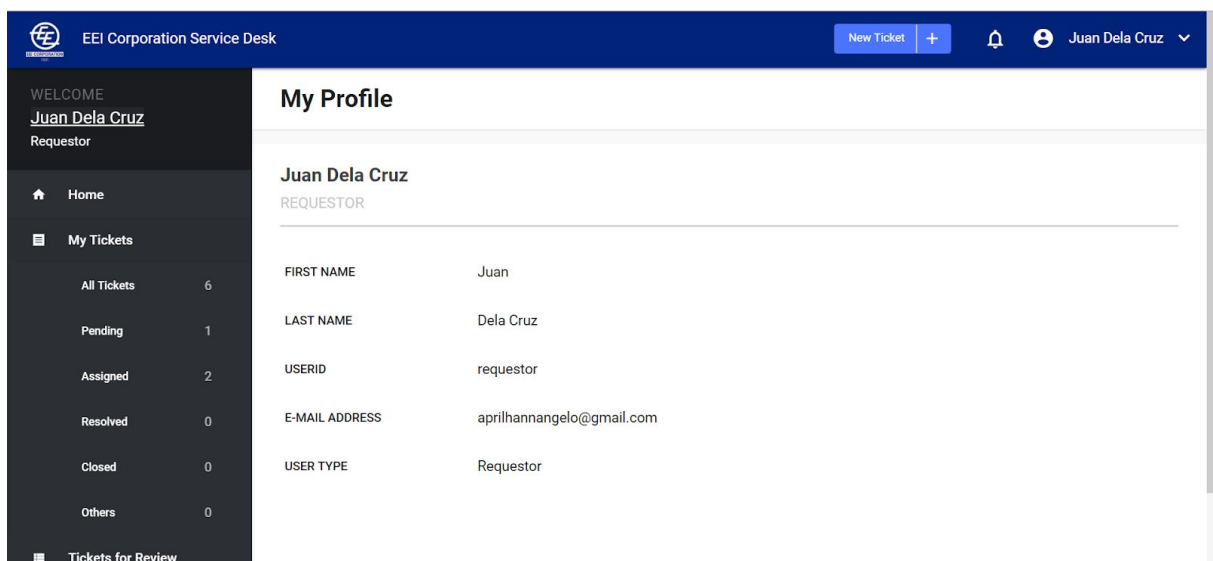
1. Click your name on the upper right hand corner of the screen



2. Click **“My Profile”** to view your account and basic information

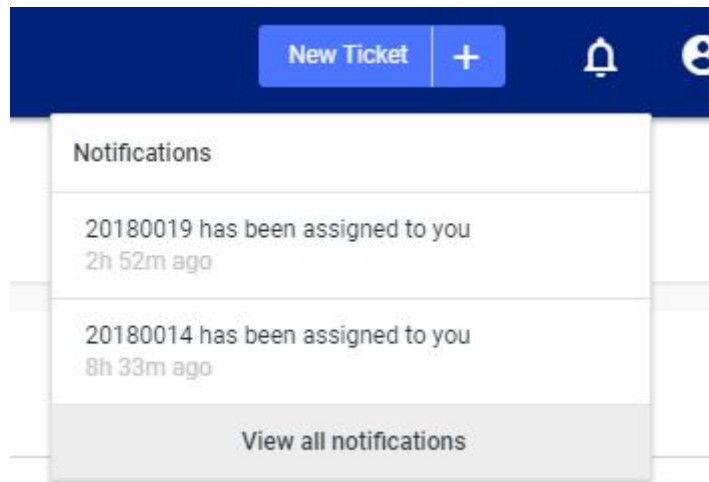


3. You will be redirected to **“My Profile”** page

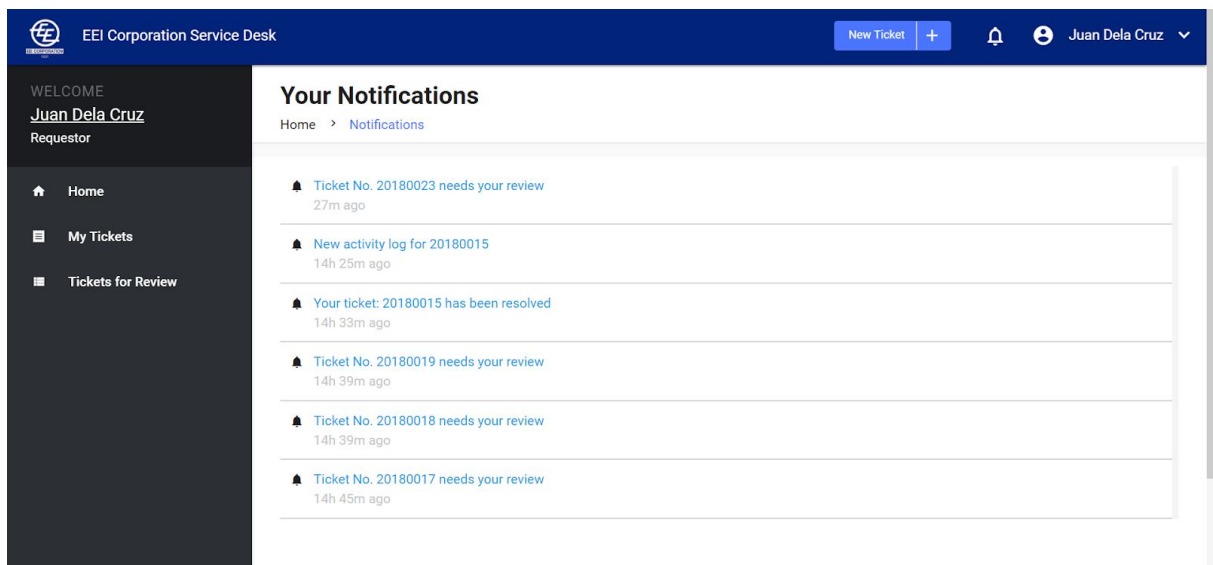


## E. Notifications

1. To view all notifications, click on the **notification bell** icon.
  - a. Clicking the notification will redirect you to the ticket details page

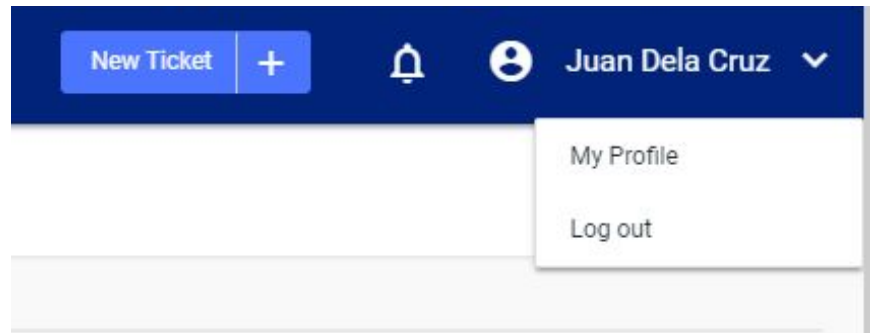


2. To view the complete list of all your notifications, click “**View all Notifications**”

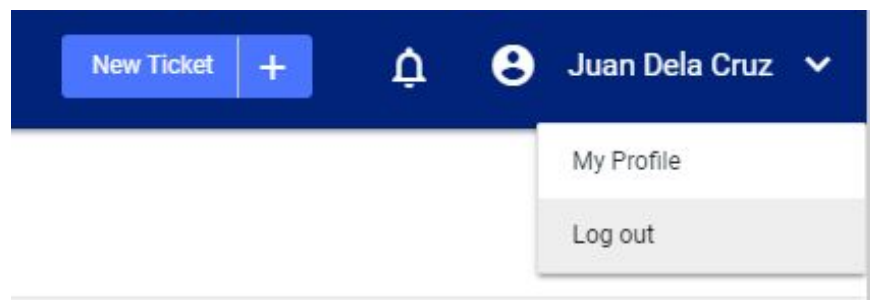


## F. Log Out

1. Click your name on the upper right hand corner of the screen

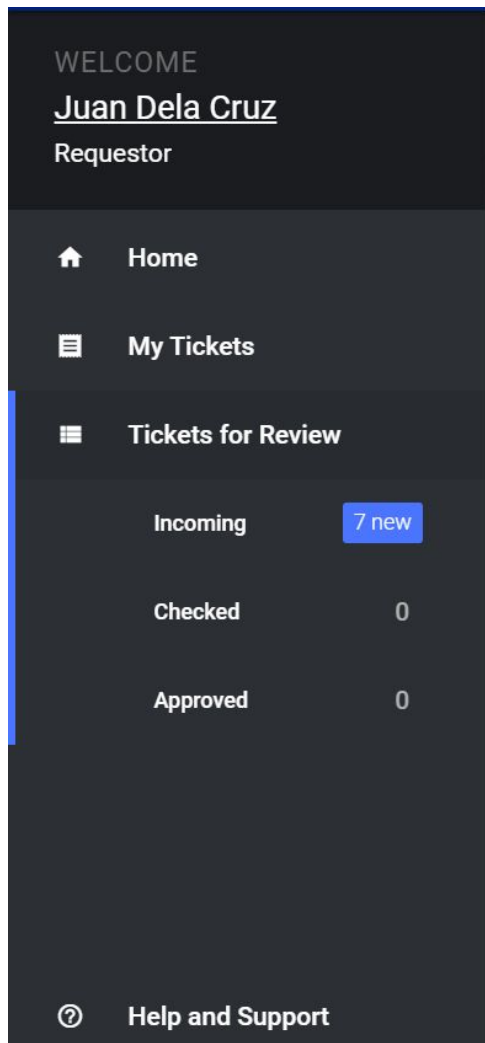


2. Click “Logout”



# I. REQUESTOR

## A. Navigation



### Home

- Displays the **Knowledge Base** - section showing a list of all Frequently Asked Questions with solutions which can be performed by the general users

### My Tickets

- Displays all tickets you submitted

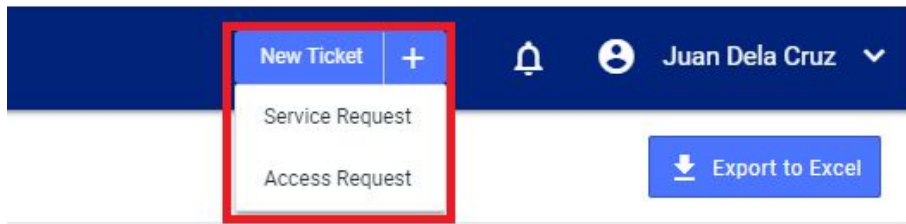
### Tickets for Review

- Displays all tickets that are in need to be checked or approved

### Help and Support

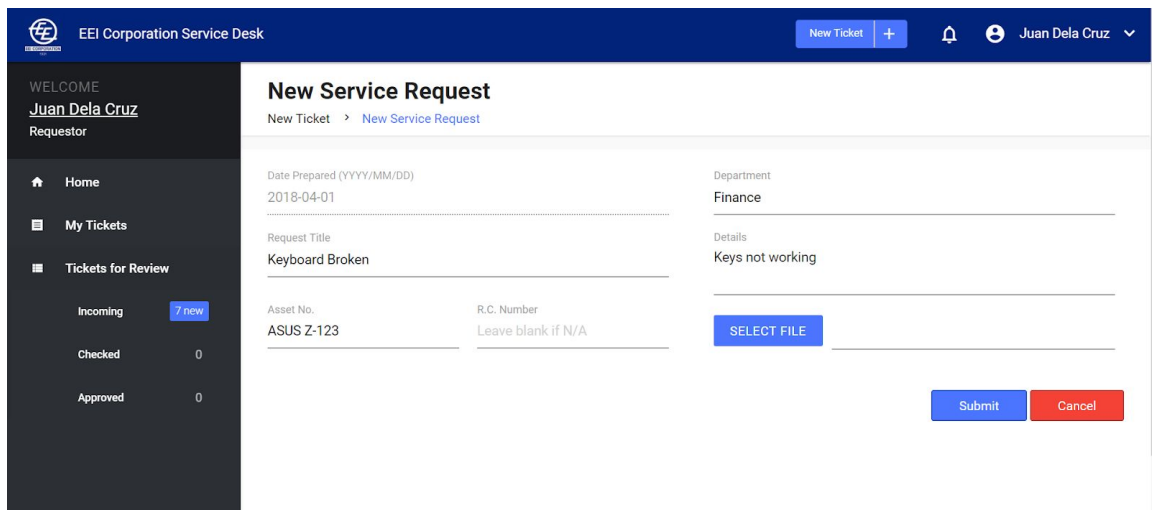
## B. Submitting a New Ticket

To submit a ticket, click **“New Ticket”** button on the top navigation bar and **select** the corresponding type of ticket for your need

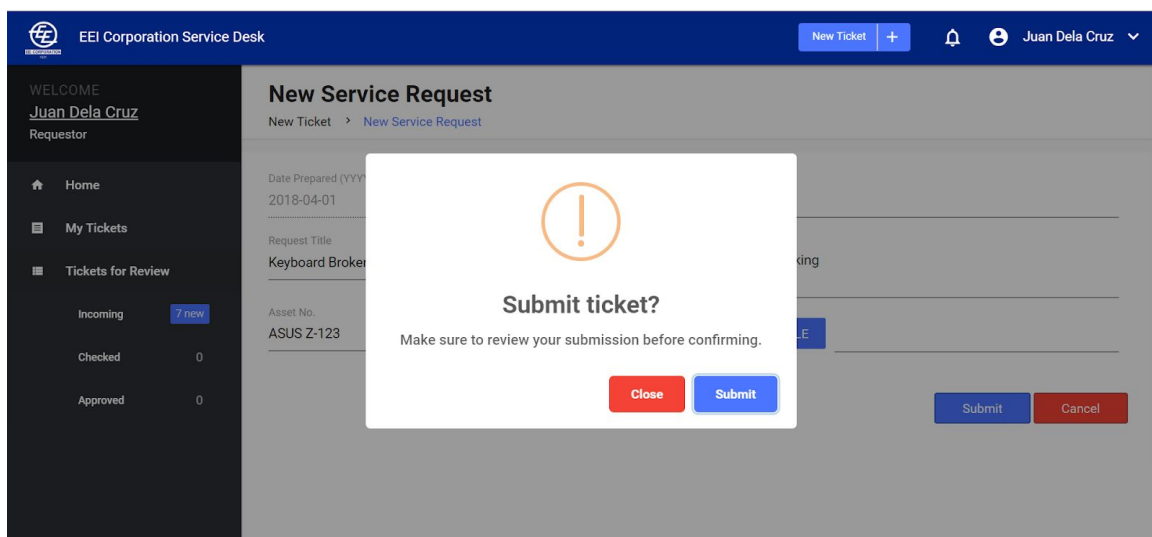


### I. For Service Request:

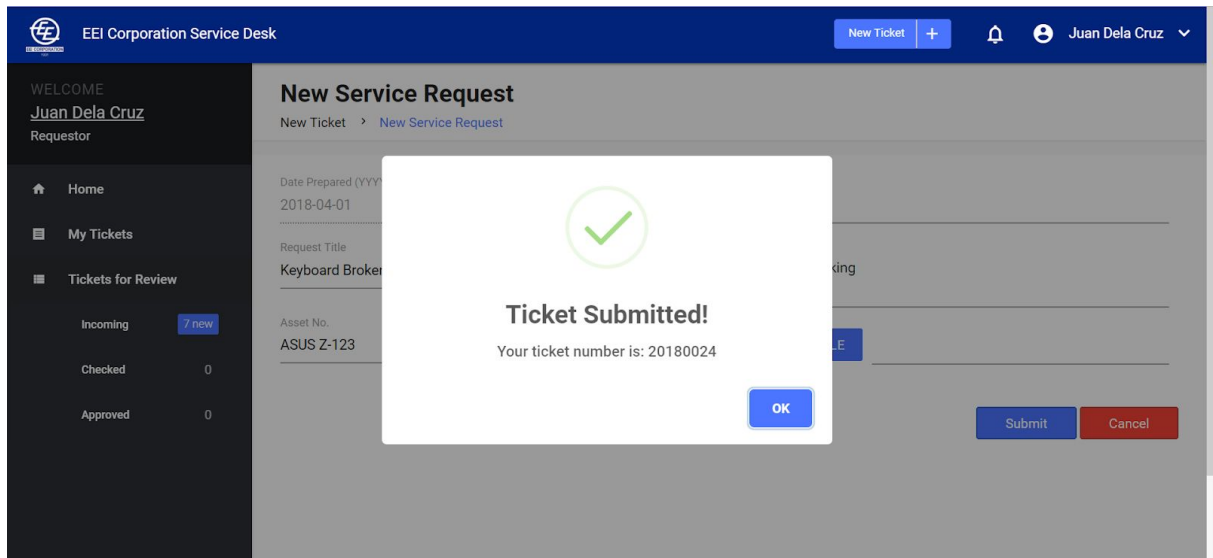
1. Fill out the digital service request form.
2. Attach a file or screenshot if possible.
3. Click **“Submit”**. Make sure to review the details before submitting.



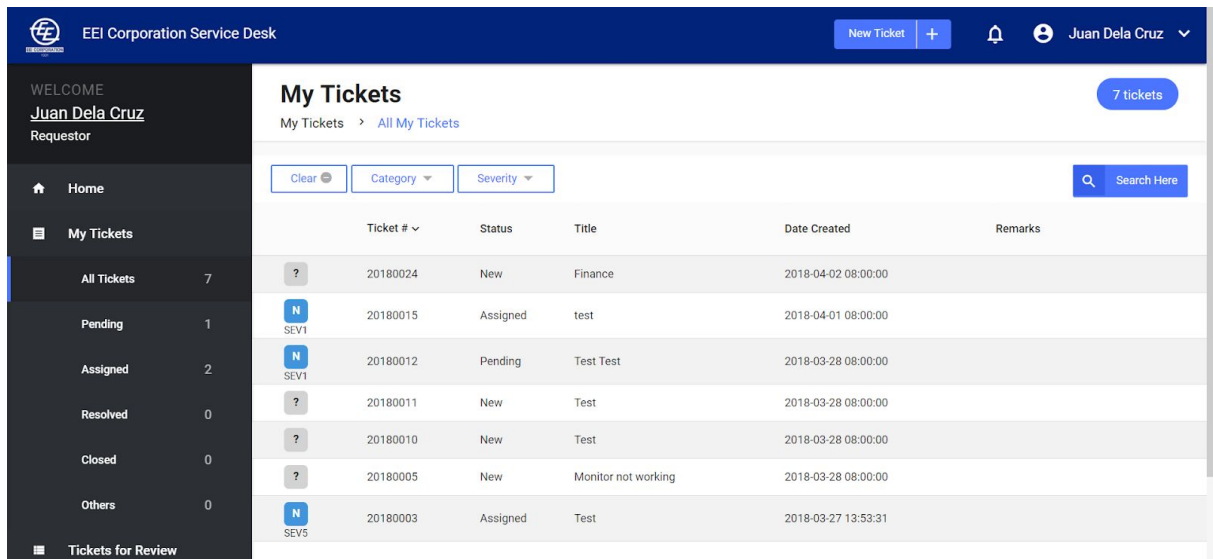
4. A confirmation box will pop out after you click the **“Submit”** button.



- To finally confirm your submission, click the **“Submit”** button again. A ticket number will be assigned to your request



- Your newly submitted ticket can be found on **“My Tickets”** page





## II. For User Access Request:

1. Fill out the digital service request form. The form has 3 sections: Requestor Details, Reviewed By and Request Details
  - a. If needed, fill out the **checker** and/or **approver** fields under the **“Reviewed By”** section of the form
    - *Note: checker and approver must also have an account*
  - b. Type the details of the people to be granted access to by clicking **“Add Row”** in the **“Request Details”** section of the form.

The screenshot shows the 'New User Access Request' form in the EEI Corporation Service Desk. The form is divided into three main sections: Requestor Details, Reviewed By, and Request Details.

**Requestor Details:**

- Date Prepared (YYYY/MM/DD): 2018-04-01
- R.C. Number: 12345
- Request Title: Lotus Notes Access for Team
- Company: EEI Corporation
- Expiry Date: 04/26/2018
- Department/Project: MRT-7 Project

**Reviewed By:**

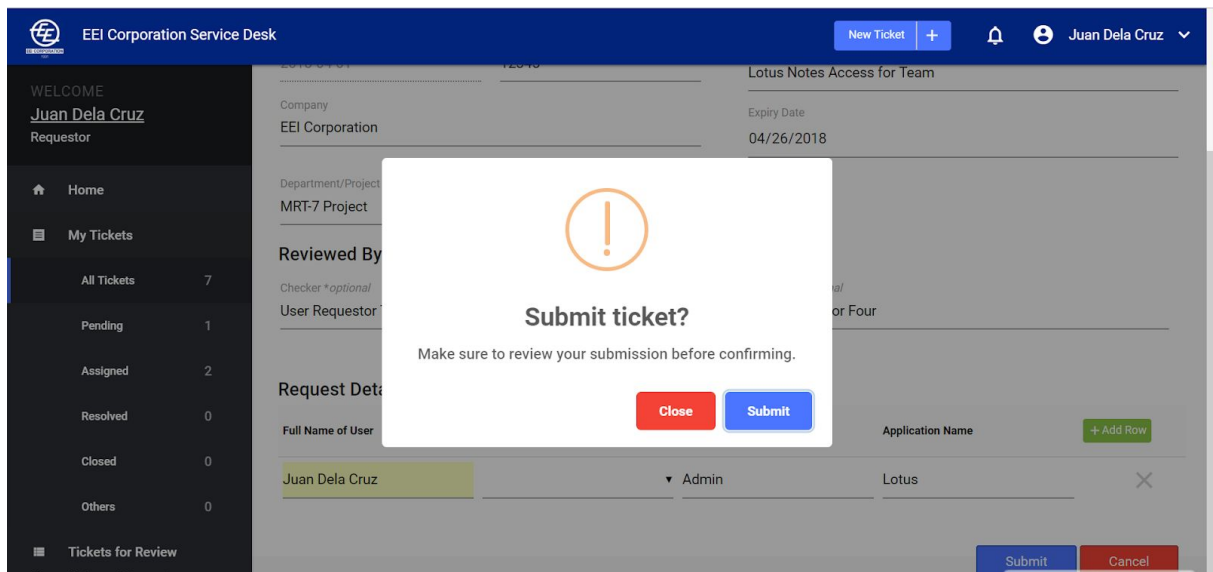
- Checker \*optional: User Requestor Two
- Approver \*optional: User Requestor Four

**Request Details:**

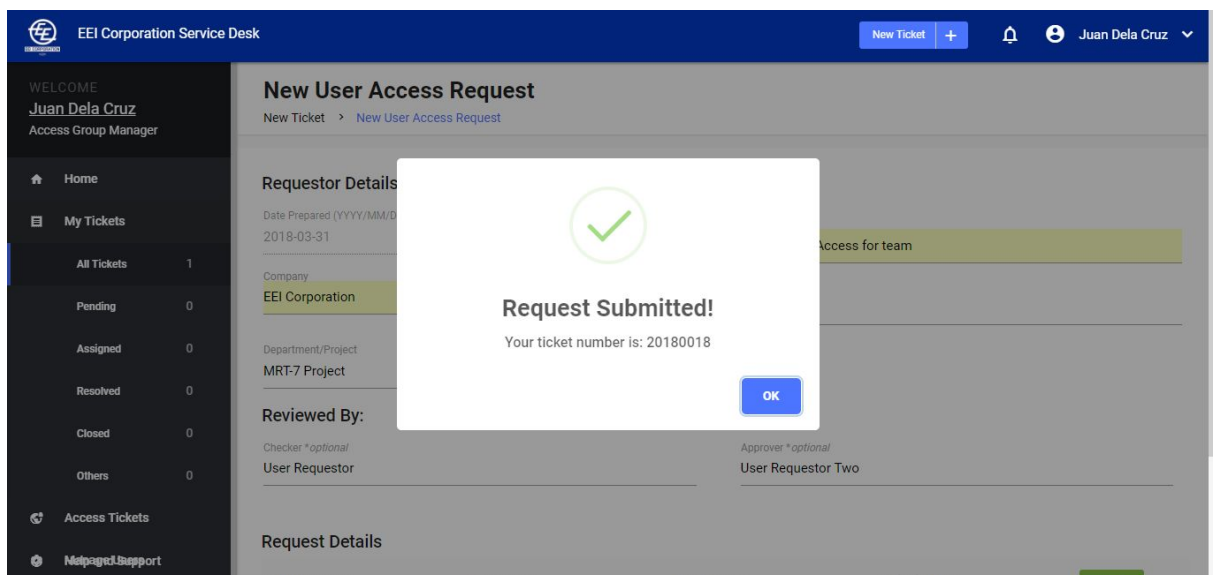
Full Name of User	Request Type	Access Request	Application Name	
Juan Dela Cruz		Admin	Lotus	<a href="#">+ Add Row</a>

Buttons: Submit, Cancel

2. Click **“Submit”**. Make sure to review the details before submitting.



3. A confirmation box will pop out. Click **“Submit”** again to finally confirm your submission.



4. An e-mail will be sent to the checker or approver for notification and a ticket number will be assigned to your request for your reference.

## C. My Tickets

EEI Corporation Service Desk

WELCOME  
Juan Dela Cruz  
Requestor

Home  
My Tickets

All Tickets 8  
Pending 1  
Assigned 2  
Resolved 0  
Closed 0  
Others 0

Tickets for Review

My Tickets  
My Tickets > All My Tickets

Filter Buttons: Clear, Category, Severity

Search Button: Search Here

Ticket #	Status	Title	Date Created	Remarks
20180025	New	Lotus Notes Access for Team	2018-04-02 08:00:00	
20180024	New	Finance	2018-04-02 08:00:00	
20180015	Assigned	test	2018-04-01 08:00:00	
20180012	Pending	Test Test	2018-03-28 08:00:00	
20180011	New	Test	2018-03-28 08:00:00	
20180005	New	Monitor not working	2018-03-28 08:00:00	
20180003	Assigned	Test	2018-03-27 13:53:31	

Filter by Status

Table Sorter

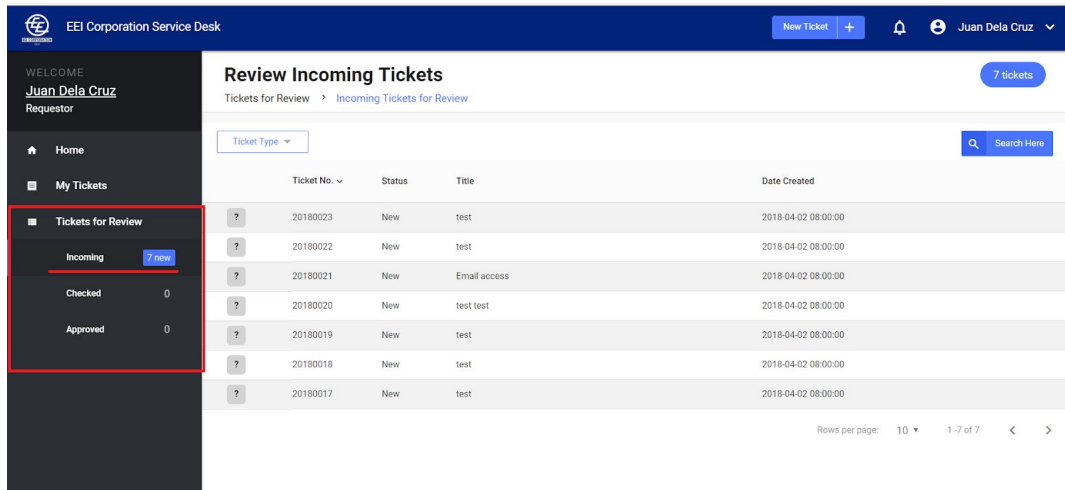
Rows per page: 10 1-8 of 8

- To view the details of each ticket, click on the row of the ticket.
- Filter Buttons *\*also applicable to all other tables*
  - By Status - refer to the side navigation for the links.
  - By Category - “Category” dropdown button is visible on the page before the table
  - By Severity Level - “Severity”.dropdown button is visible on the page before the table
  - Clear Filter - “Clear” button is visible on the page before the table
- Search Button *\*also applicable to all other tables*
  - To search for any ticket or ticket detail, click the “Search Here” button on the right side of the page
- Table Sorter *\*also applicable to all other tables*
  - To arrange the rows by column in ascending or descending, click on the table header of the column you wish to be the basis of arrangement. .

## D. Tickets for Review

### I. Checking Tickets

1. Click “**Incoming Tickets**” under Tickets for Review
2. Click the table row of the ticket you want to review to see all of its details



EEI Corporation Service Desk

Welcome Juan Dela Cruz Requestor

Home My Tickets Tickets for Review Incoming 7 new Checked 0 Approved 0

### Review Incoming Tickets

Tickets for Review > Incoming Tickets for Review

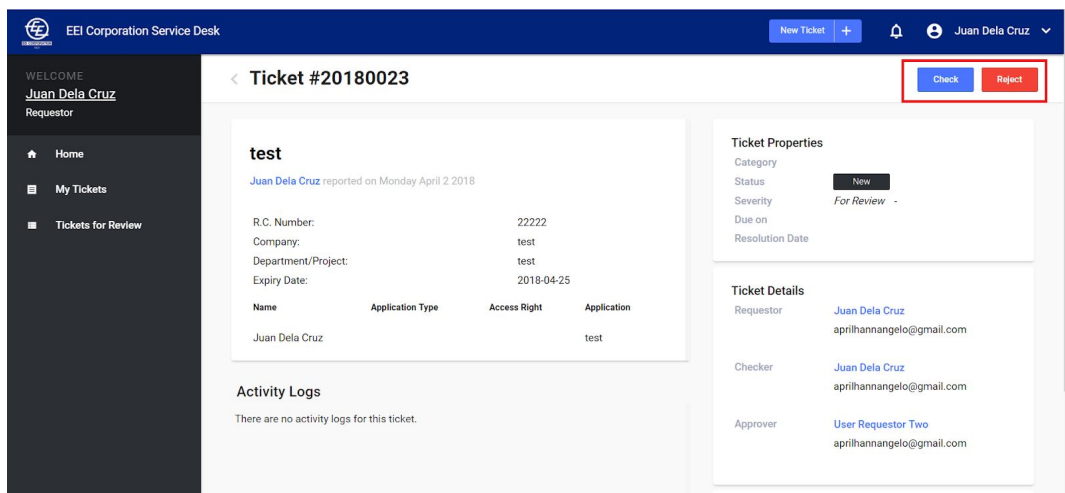
7 tickets

Ticket Type Search Here

Ticket No.	Status	Title	Date Created
20180023	New	test	2018-04-02 08:00:00
20180022	New	test	2018-04-02 08:00:00
20180021	New	Email access	2018-04-02 08:00:00
20180020	New	test test	2018-04-02 08:00:00
20180019	New	test	2018-04-02 08:00:00
20180018	New	test	2018-04-02 08:00:00
20180017	New	test	2018-04-02 08:00:00

Rows per page: 10 1-7 of 7

3. Click “**Check**” to check ticket after reading through ticket details or “**Reject**” if you wish to reject the submitted ticket.



EEI Corporation Service Desk

Welcome Juan Dela Cruz Requestor

Home My Tickets Tickets for Review

### Ticket #20180023

Check Reject

test

Juan Dela Cruz reported on Monday April 2 2018

R.C. Number: 22222  
Company: test  
Department/Project: test  
Expiry Date: 2018-04-25

Name	Application Type	Access Right	Application
Juan Dela Cruz			test

Activity Logs

There are no activity logs for this ticket.

#### Ticket Properties

Category  
Status: New  
Severity: For Review  
Due on  
Resolution Date

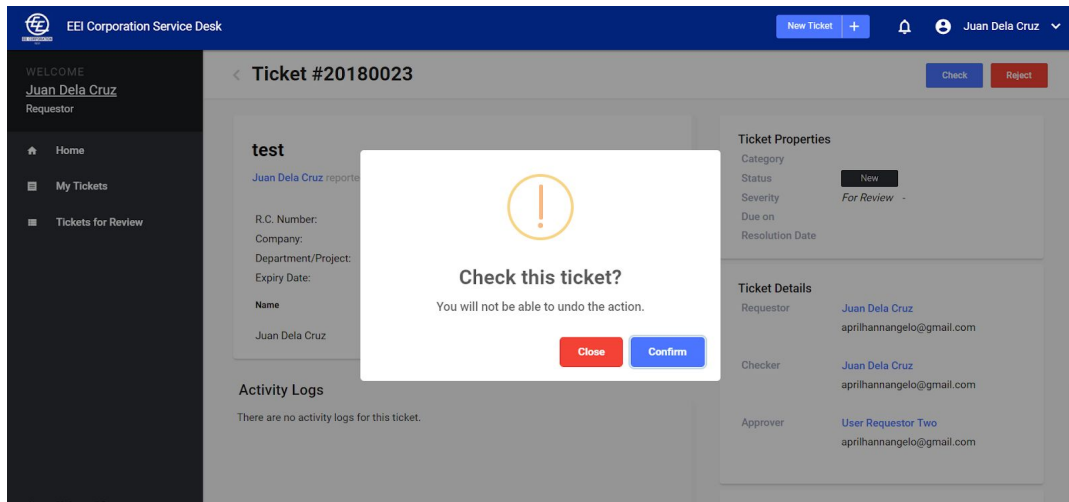
#### Ticket Details

Requestor: Juan Dela Cruz  
aprihannangelo@gmail.com

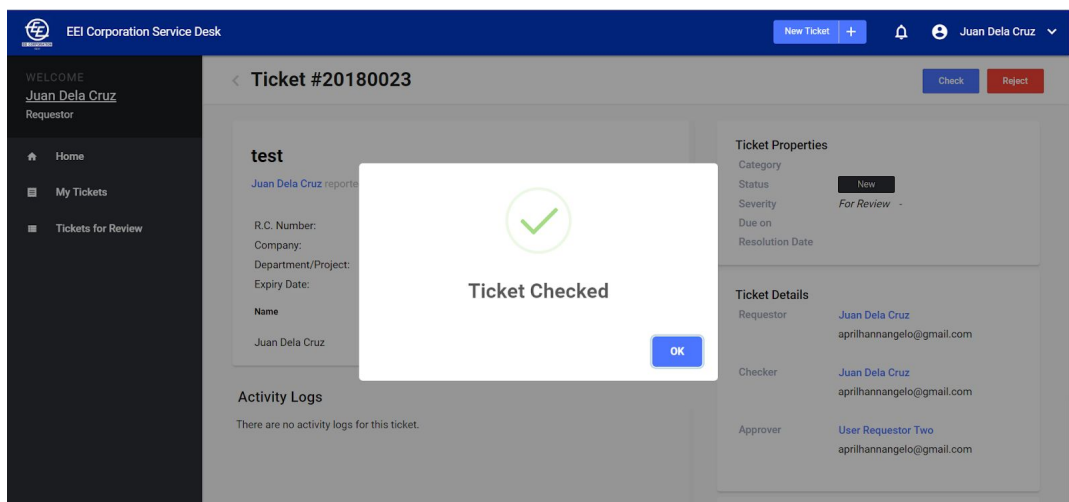
Checker: Juan Dela Cruz  
aprihannangelo@gmail.com

Approver: User Requestor Two  
aprihannangelo@gmail.com

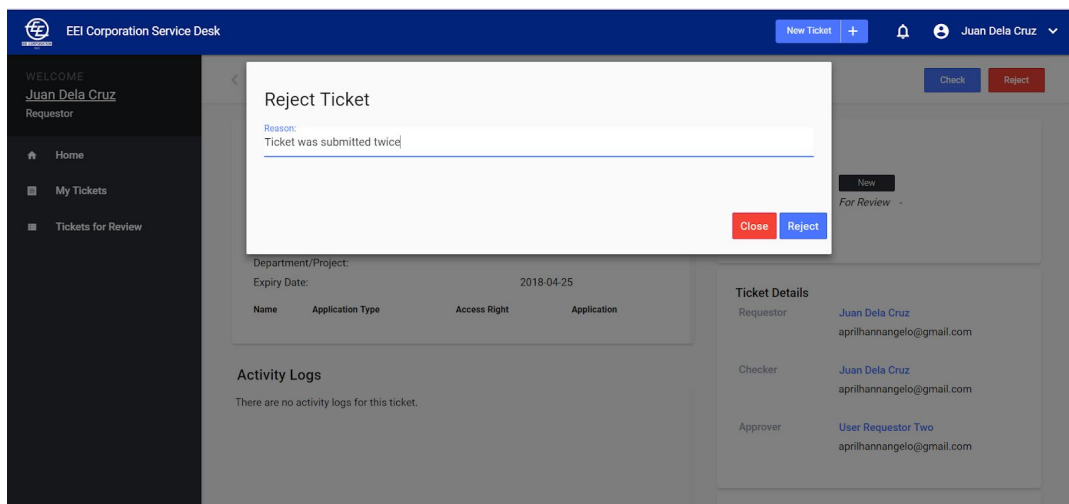
- a. If checking a ticket, a confirmation box will pop out after you click the “**Check**” button.



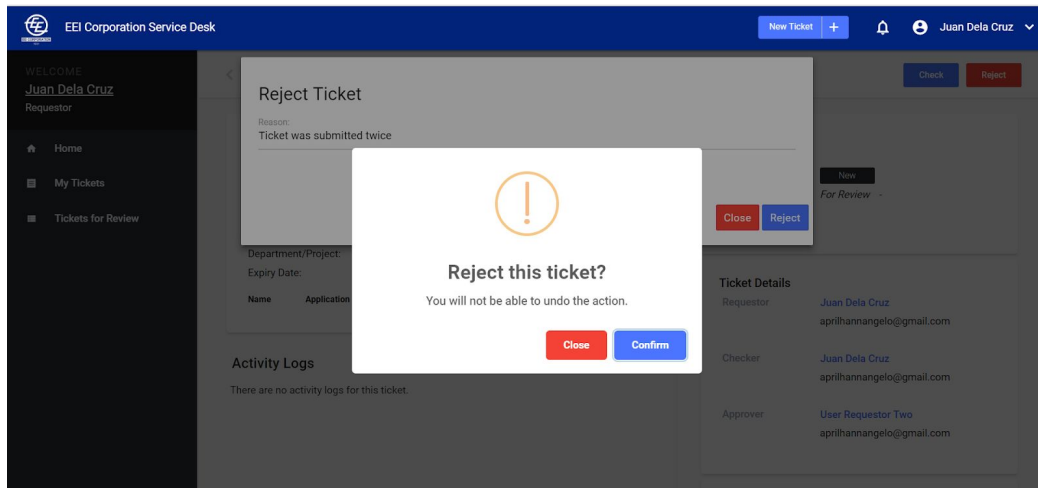
- i. To finally confirm the checking of the ticket, click the **"Confirm"** button.



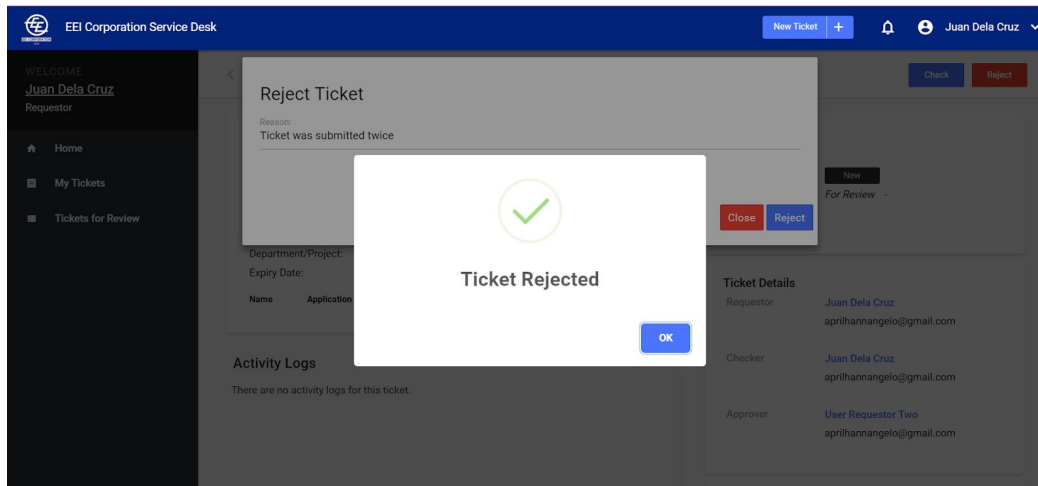
- b. If rejecting a ticket, a prompt will pop out asking the requestor to provide a reason for rejecting. Click on the **"Reject"** button once again to proceed.



- i. A confirmation box will pop out. Click on **“Confirm”** button to proceed



- ii. Ticket is officially rejected.



## II. Approving Tickets

III. Click “Incoming Tickets” under Tickets for Review

IV. Click the table row of the ticket you want to review to see all of its details

EEI Corporation Service Desk

WELCOME  
Juan Dela Cruz  
Requestor

Home  
My Tickets  
Tickets for Review  
Incoming 7 new  
Checked 0  
Approved 0

### Review Incoming Tickets

Tickets for Review > Incoming Tickets for Review

Ticket Type Search Here

Ticket No.	Status	Title	Date Created
20180023	New	test	2018-04-02 08:00:00
20180022	New	test	2018-04-02 08:00:00
20180021	New	Email access	2018-04-02 08:00:00
20180020	New	test test	2018-04-02 08:00:00
20180019	New	test	2018-04-02 08:00:00
20180018	New	test	2018-04-02 08:00:00
20180017	New	test	2018-04-02 08:00:00

Rows per page: 10 1 - 7 of 7

V. Click “Approve” to check ticket after reading through ticket details or “Reject” if you wish to reject the submitted ticket.

EEI Corporation Service Desk

WELCOME  
Juan Dela Cruz  
Requestor

Home  
My Tickets  
Tickets for Review

### Ticket #20180023

Approve Reject

**test**  
Juan Dela Cruz reported on Monday April 2 2018

R.C. Number: 22222  
Company: test  
Department/Project: test  
Expiry Date: 2018-04-25

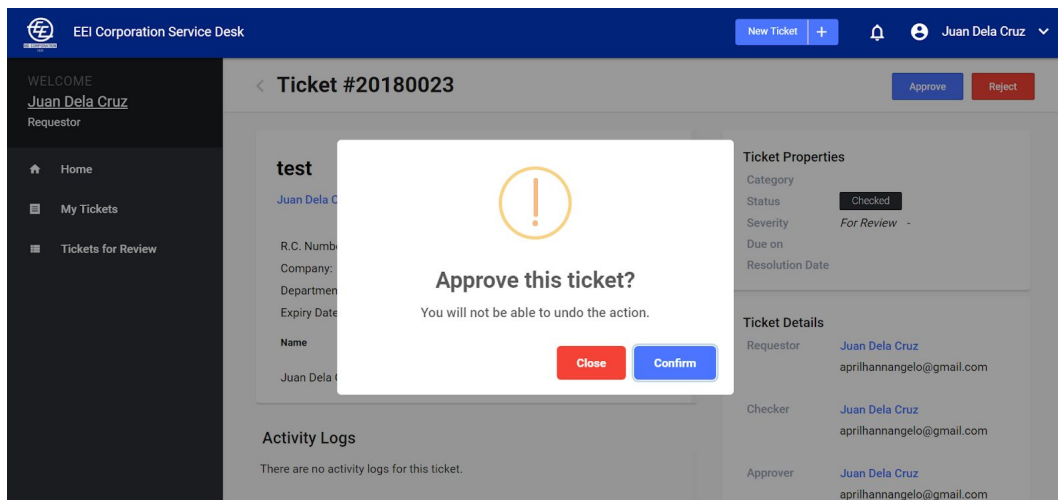
Name	Application Type	Access Right	Application
Juan Dela Cruz			test

**Activity Logs**  
There are no activity logs for this ticket.

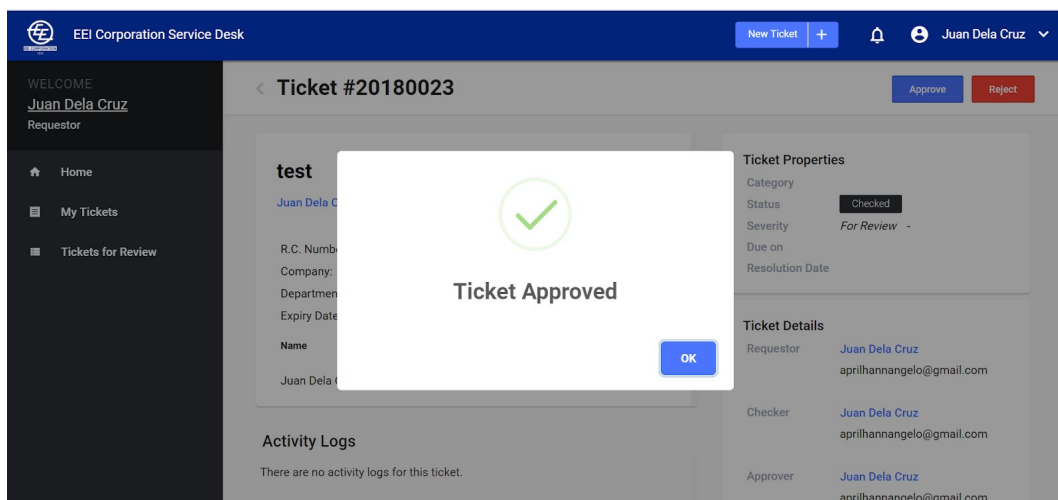
**Ticket Properties**  
Category  
Status: Checked  
Severity: For Review  
Due on  
Resolution Date

**Ticket Details**  
Requestor: Juan Dela Cruz  
aprihannangelo@gmail.com  
Checker: Juan Dela Cruz  
aprihannangelo@gmail.com  
Approver: Juan Dela Cruz  
aprihannangelo@gmail.com

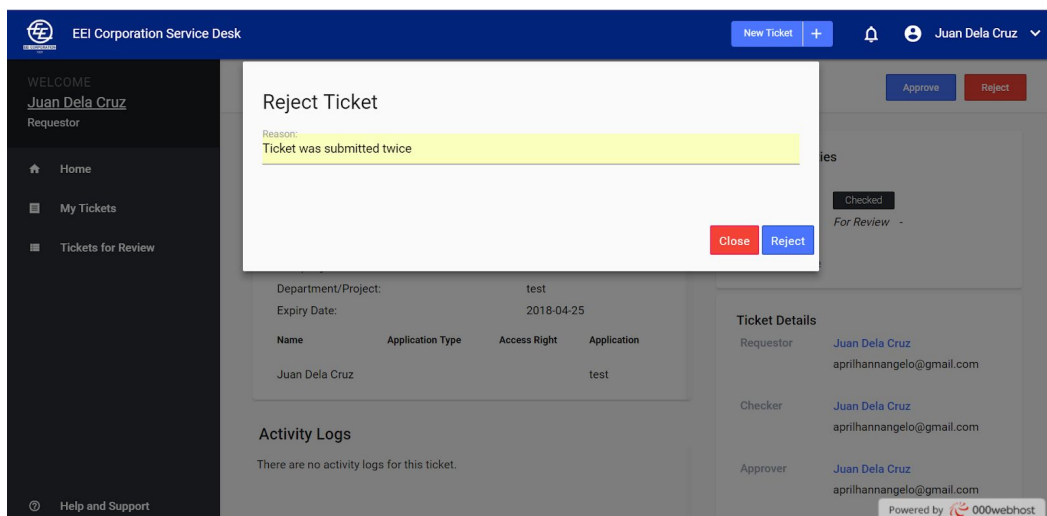
A. If approving a ticket, a confirmation box will pop out after you click the “Check” button.



1. To finally confirm the approving of the ticket, click the **“Confirm”** button.

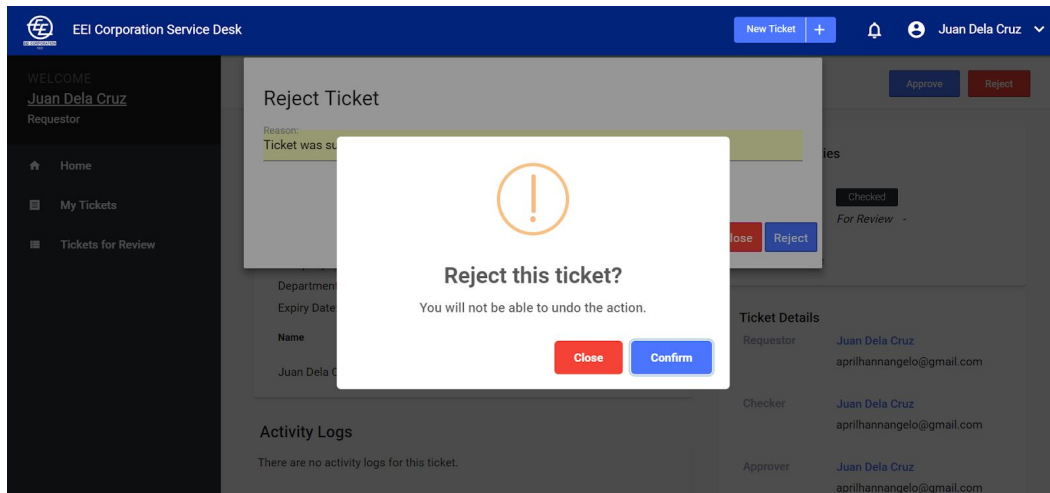


- B. If rejecting a ticket, a prompt will pop out asking the requestor to provide a reason for rejecting. Click on the **“Reject”** button once again to proceed.

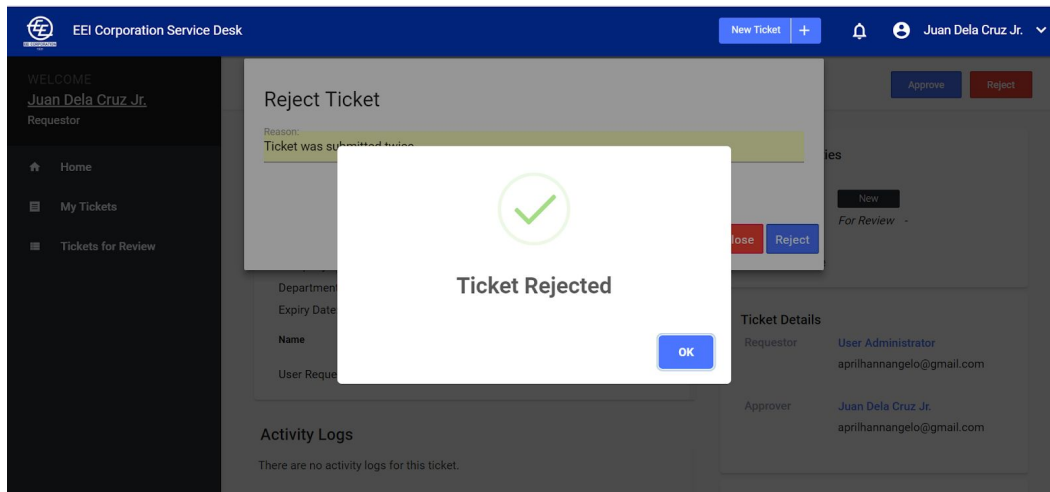




1. A confirmation box will pop out. Click on “**Confirm**” button to proceed

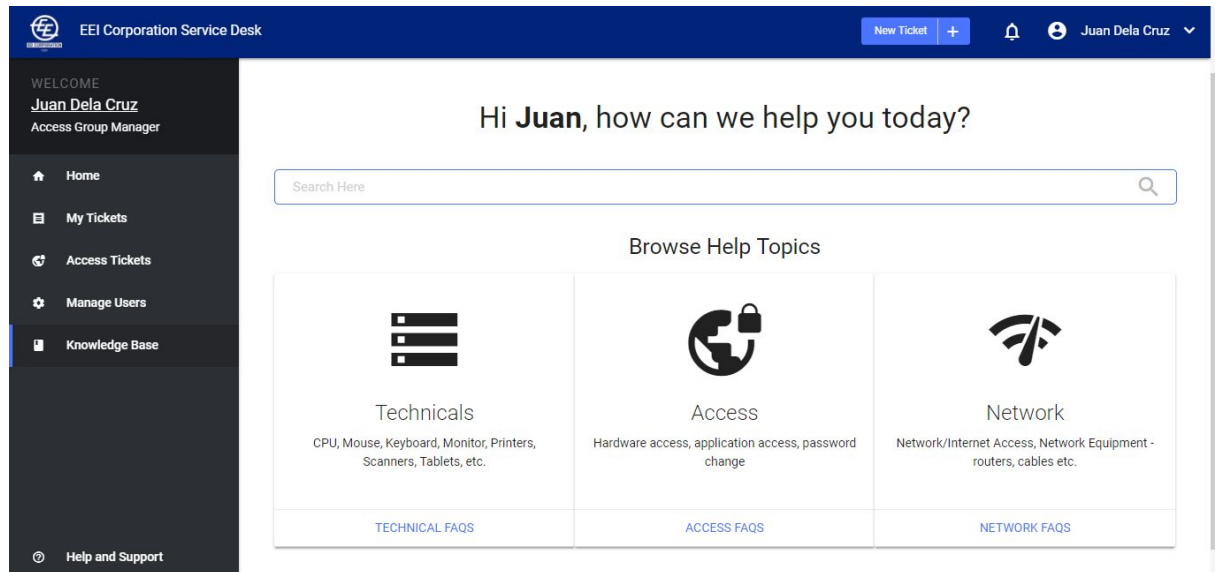


2. Ticket is officially rejected.



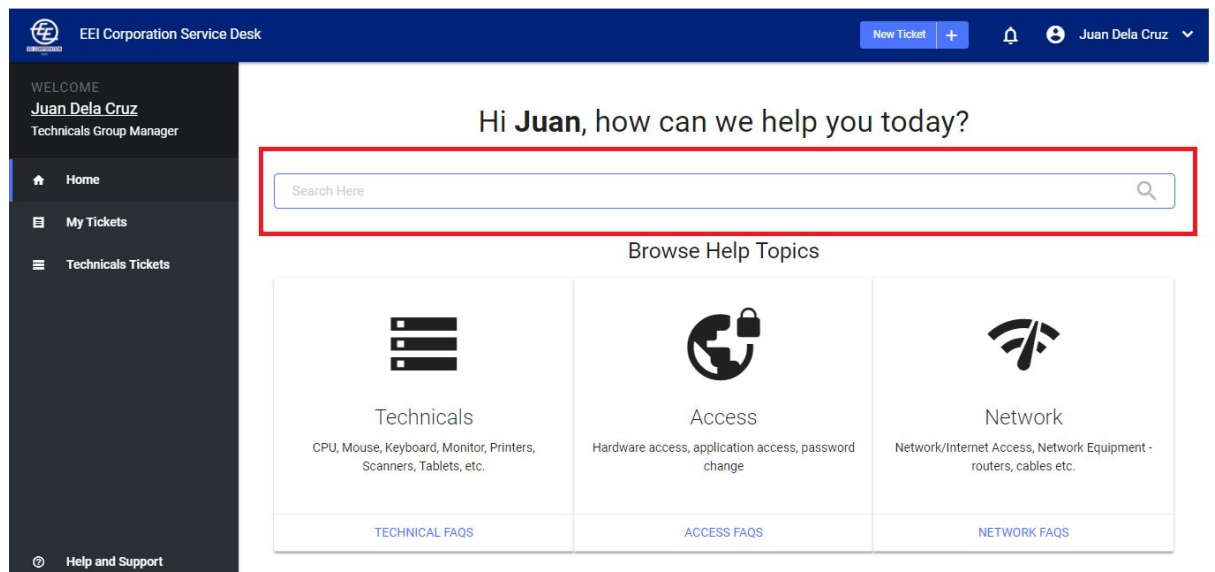
## E. Knowledge Base

The Knowledge Base Section for the Requestor is similar to that of a regular user. He/She can search and view the list of articles for any general inquiries or issues that the requestor has. This will act as a self-servicing knowledge base for the requestor to use prior to submitting a ticket for resolution.






### I. Search Article

1. To search for an article, type the keywords in the search bar.





2. Click the article title you wish to view


 **EEL Corporation Service Desk**


New Ticket +  **Juan Dela Cruz** ▾

WELCOME  
**Juan Dela Cruz**  
Technicals Group Manager


 Home

 My Tickets

 Technicals Tickets

 Help and Support

## Hi **Juan**, how can we help you today?




\*For problems on the auto reset button on the monitors

My monitor is not displaying anything. What do I do?


My monitor does not turn on. What do I do?

### Browse Help Topics




#### Technicals

CPU, Mouse, Keyboard, Monitor, Printers, Scanners, Tablets, etc.



#### Access

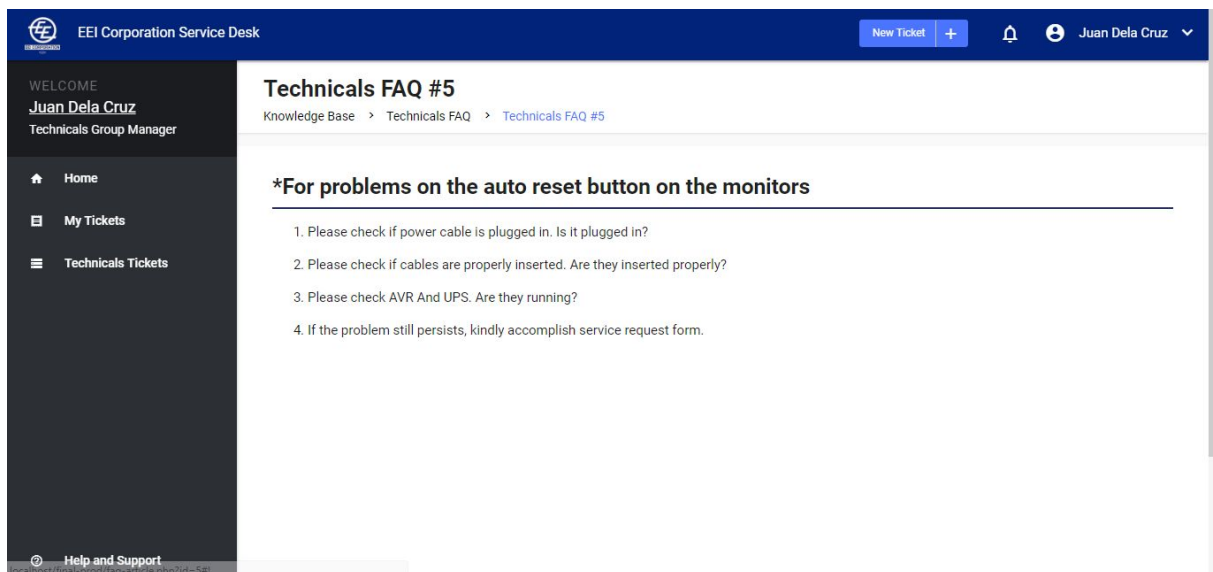
Hardware access, application access, password change



#### Network

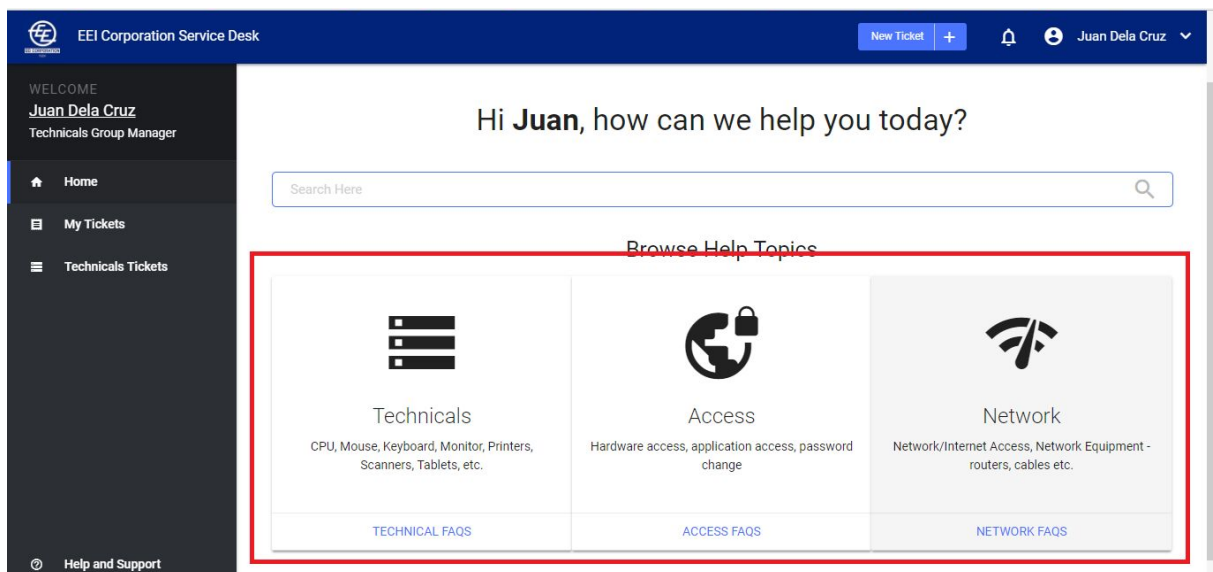
Network/Internet Access, Network Equipment - routers, cables etc.

### 3. Follow the steps found in the article page

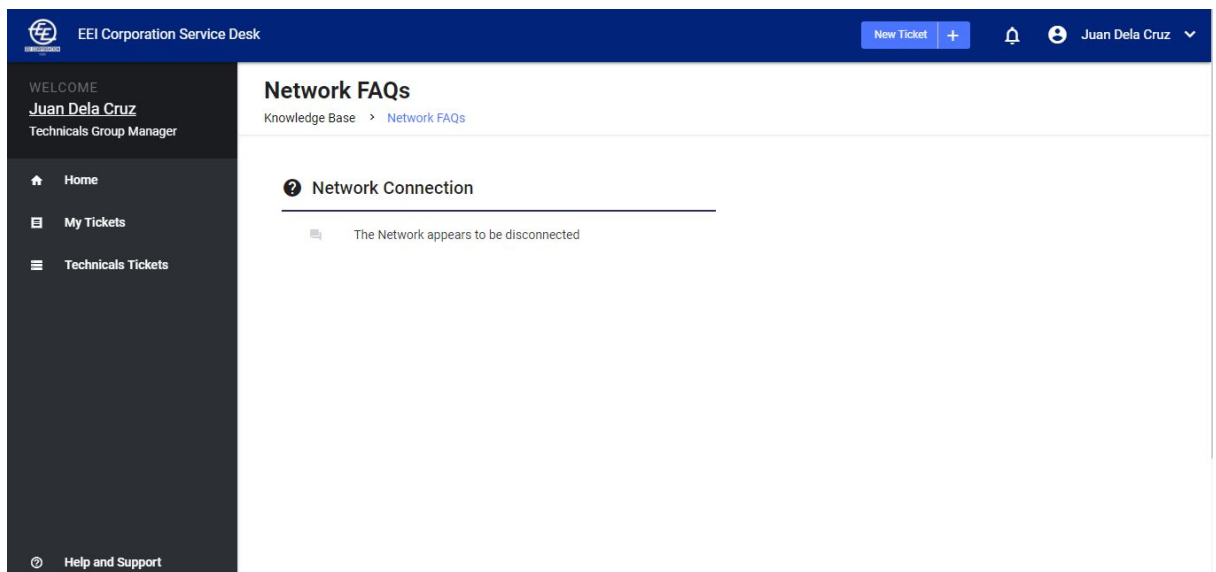


## II. View Article List

1. In the knowledge base main page, **click the category** you wish to view the articles.



2. You will be redirected to the article list page of the category you selected



3. Click on any article title to view the whole article

