



# 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

# EEI CORPORATION ONLINE SERVICE DESK SYSTEM USER MANUAL

## ABOUT THIS DOCUMENT

This user manual contains all the necessary information for the **technicals group manager** 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. Who are the different users of this system?

1. Requestor
2. Technicals Group Manager
3. Access Group Manager
4. Network Group Manager
5. Technicians
6. Network Engineers
7. Administrator

## C. What are the severity levels?

Priority	Name	Description	Resolution Time
SEV1	Critical	Interruption resulting to a complete operation interruption <b>of the entire company</b> having a severe impact on IT services availability.	4 hours
SEV2	Important	Incident reports that resulting to interruption of operation of a specific <b>department/project</b> having a severe impact on IT services availability.	6 hours
SEV3	Normal	Non critical interruption that will not allow the user to use the IT resources and possible workaround is available.	8 hours
SEV4	Very Low	The defect that does not interrupt nor damage the usability of the IT system/facilities/resources, and the desired results can be easily obtained by working around is stated as minor.	24 hours
SEV5	Low	Any cosmetic issue on application of upgrade hardware or special request that have very minimal effect in any operation	48 hours

		of the company.	
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## D. 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.

## E. 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

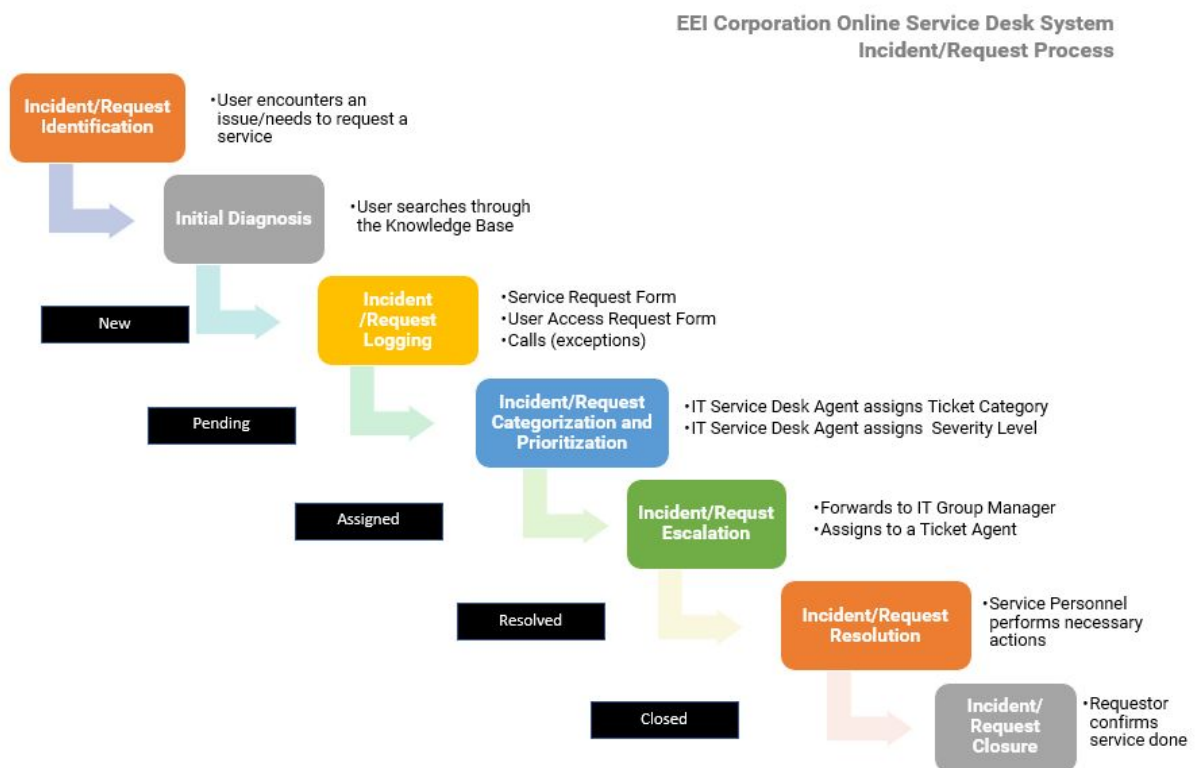
### 5. Pending

- 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.

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



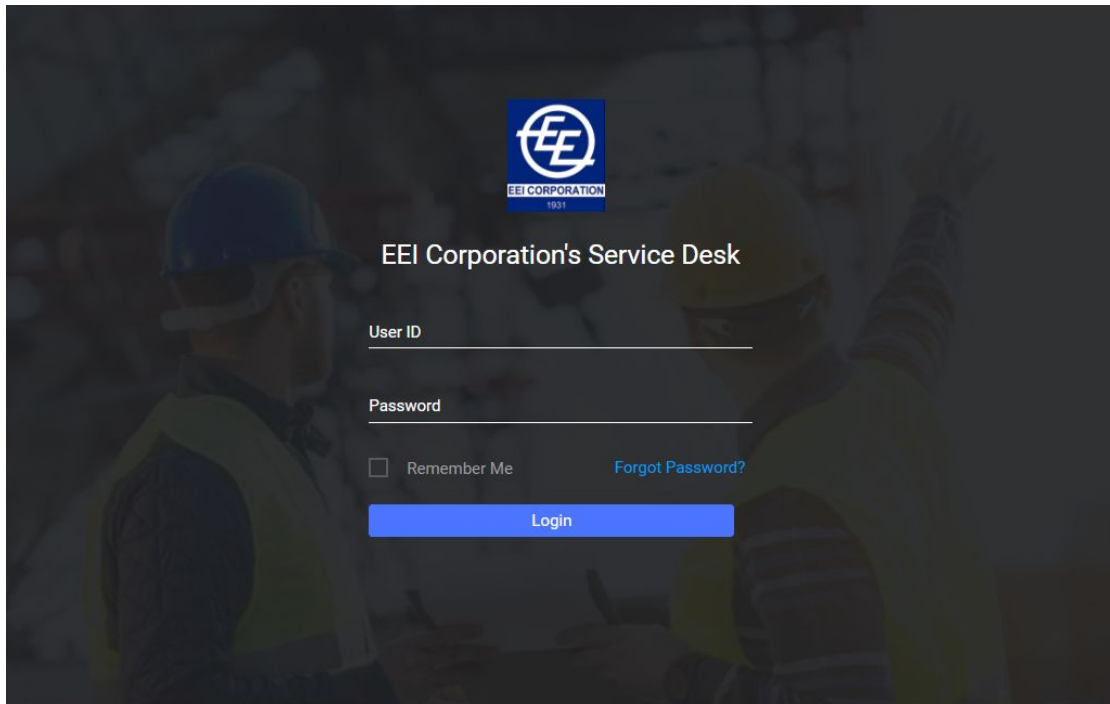
## G. Glossary of Terms

<b>Ticket</b>	An electronic documentation of a concern or an issue
<b>Service Ticket</b>	A ticket for technical 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

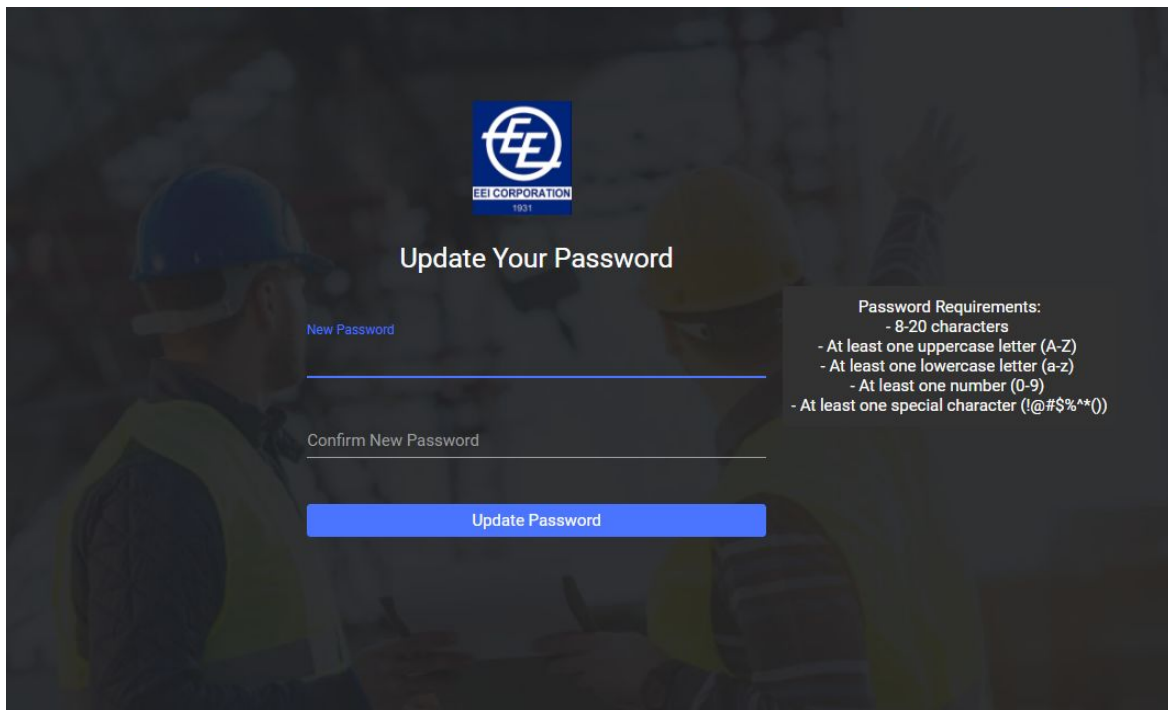
### A. Log In



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



EEI CORPORATION  
1931

### Update Your Password

New Password

Confirm New Password

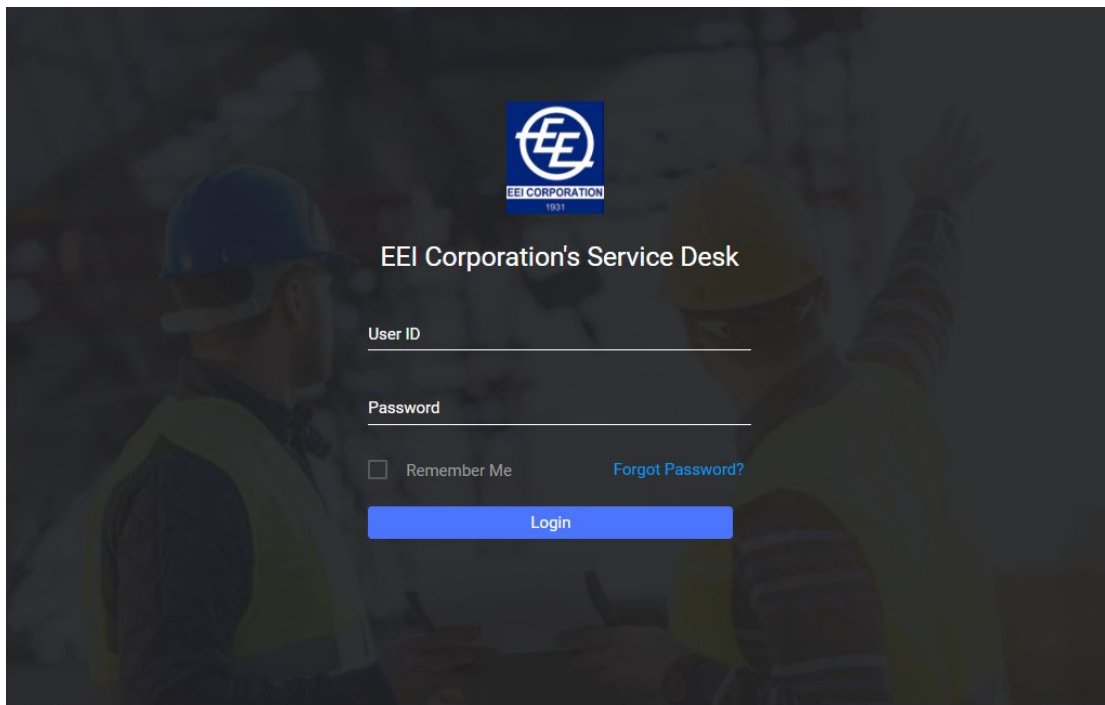
Update Password

**Password Requirements:**

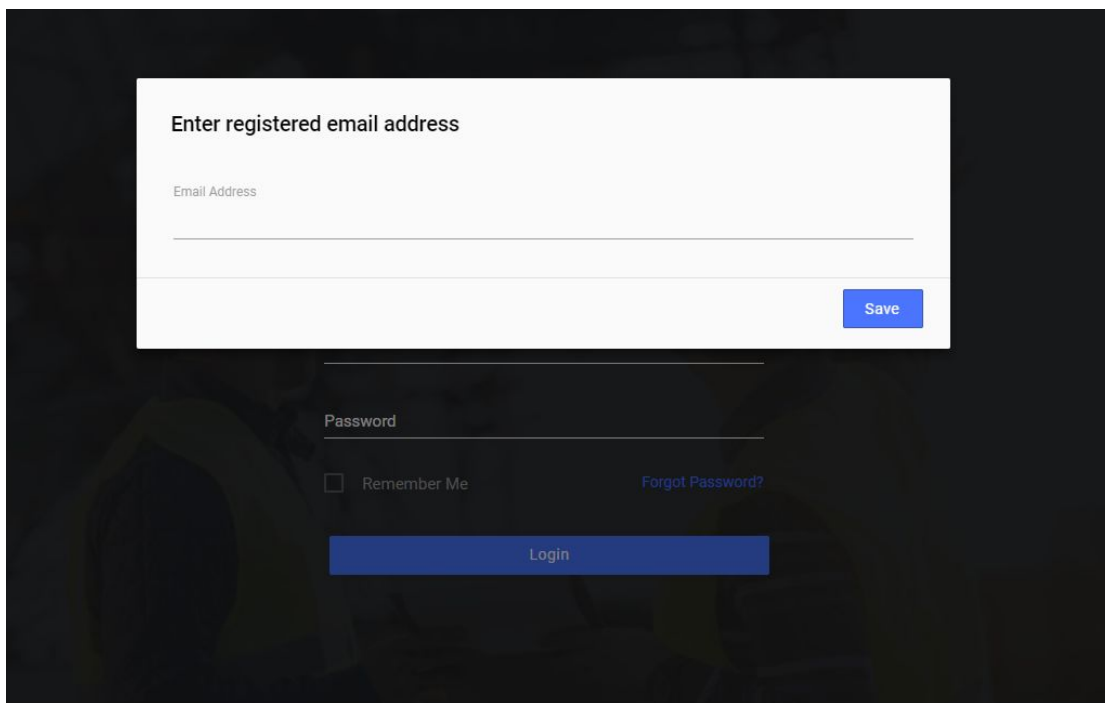
- 8-20 characters
- At least one uppercase letter (A-Z)
- At least one lowercase letter (a-z)
- At least one number (0-9)
- At least one special character (!@#%\*^&\*)

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

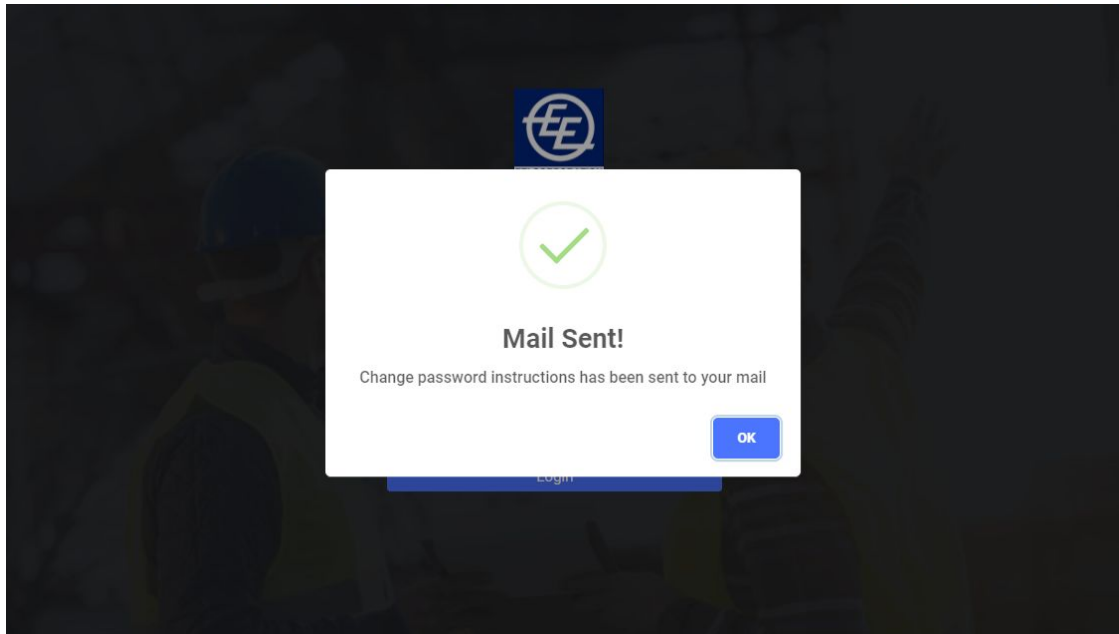


1. On the login page, click **“Forgot Password”** link above the login button



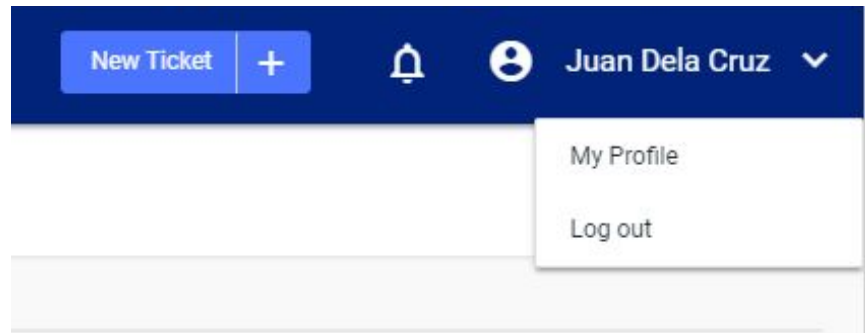
2. Enter your registered EEI e-mail address

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

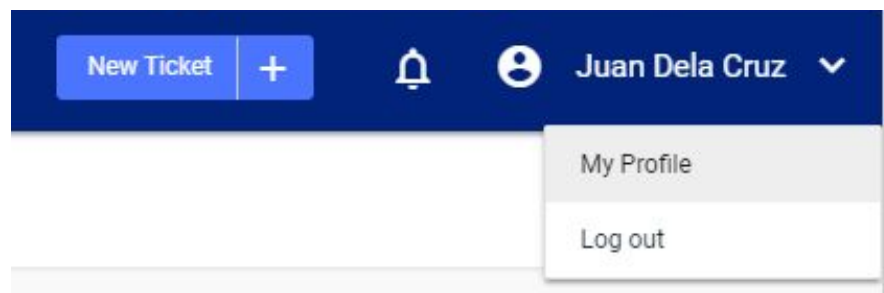


## D. My Profile

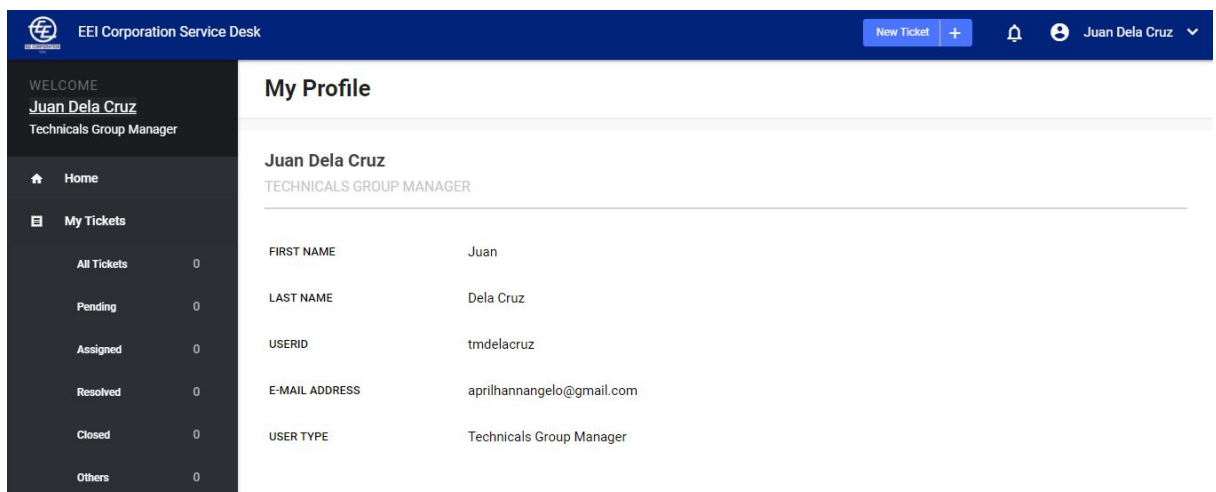
1. Click your name on the upper right hand corner of the screen



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

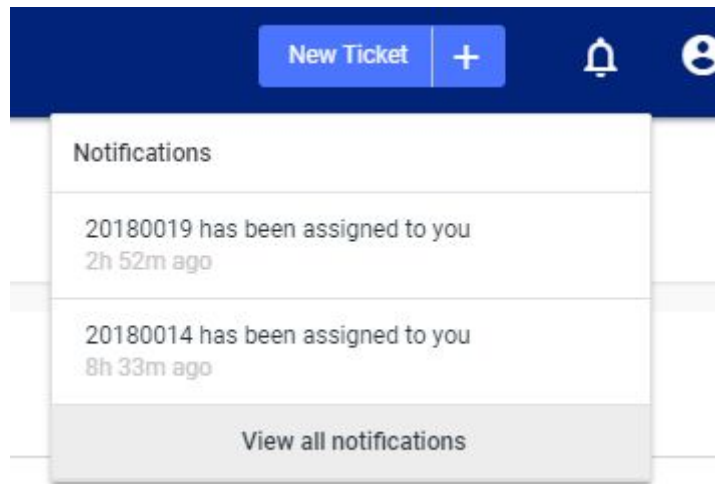


3. You will be redirected to **“My Profile”** page

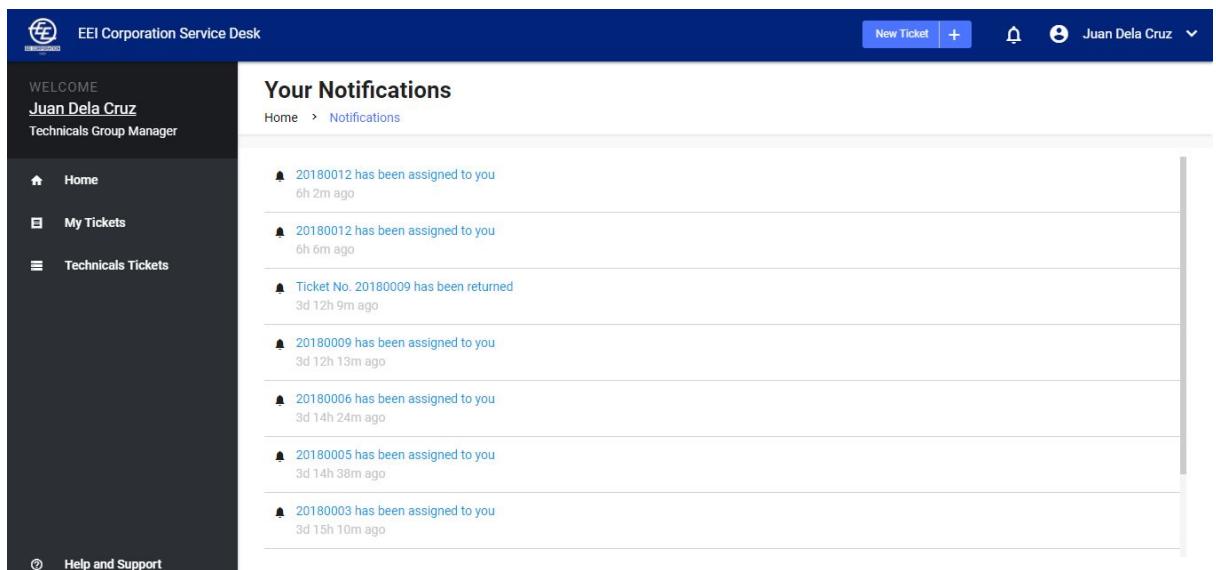


## E. Notifications

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

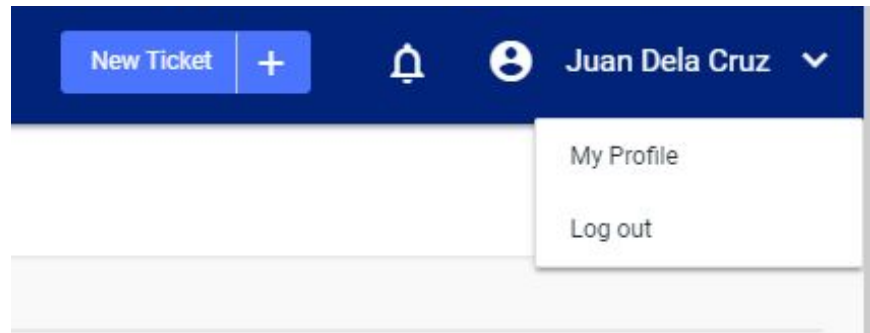


2. To view the complete list of all your notifications, click **“View all Notifications”**

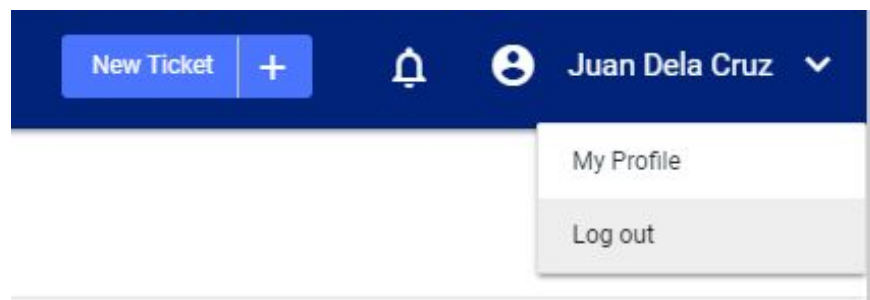


## F. Log Out

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

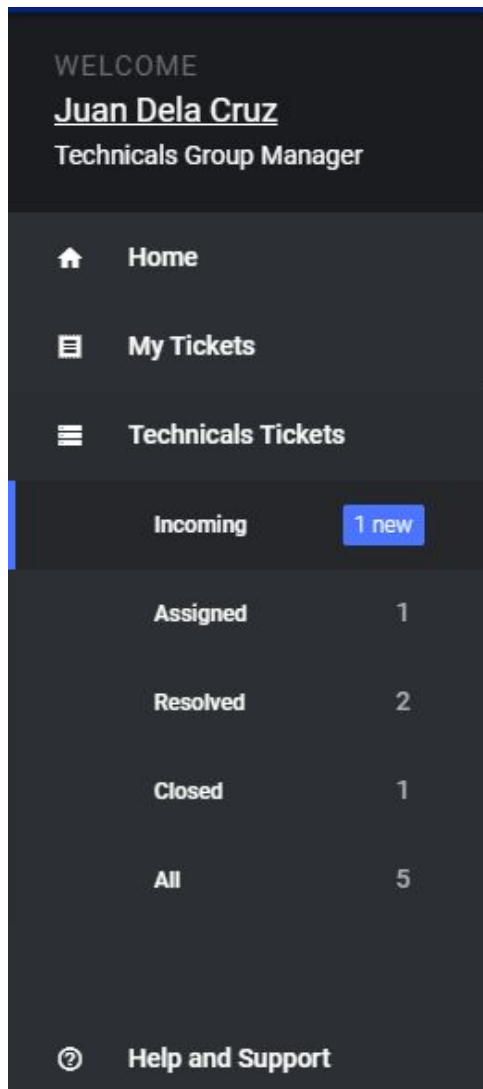


2. Click **“Logout”**



# I. TECHNICALS GROUP MANAGER

## 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

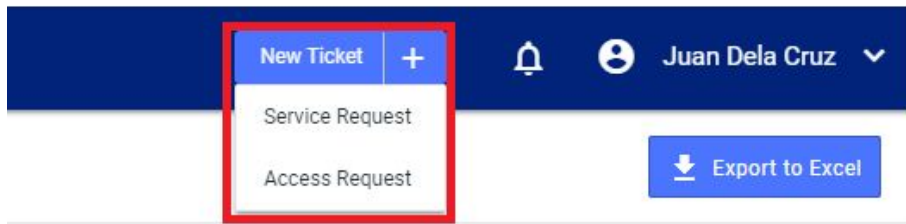
### Technicals Tickets

- Displays all tickets categorized as technicals

### Help and Support

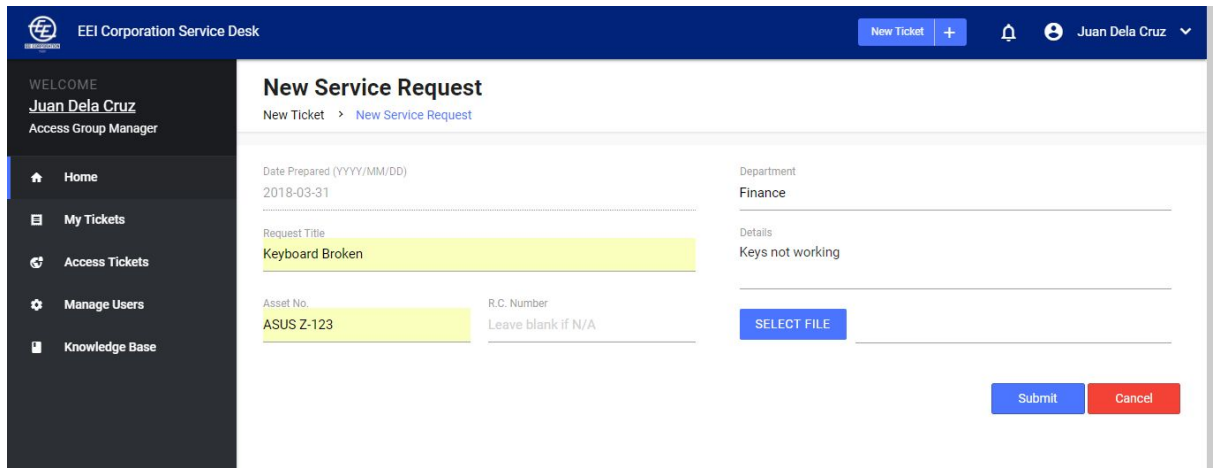
## B. Submitting a New Ticket

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

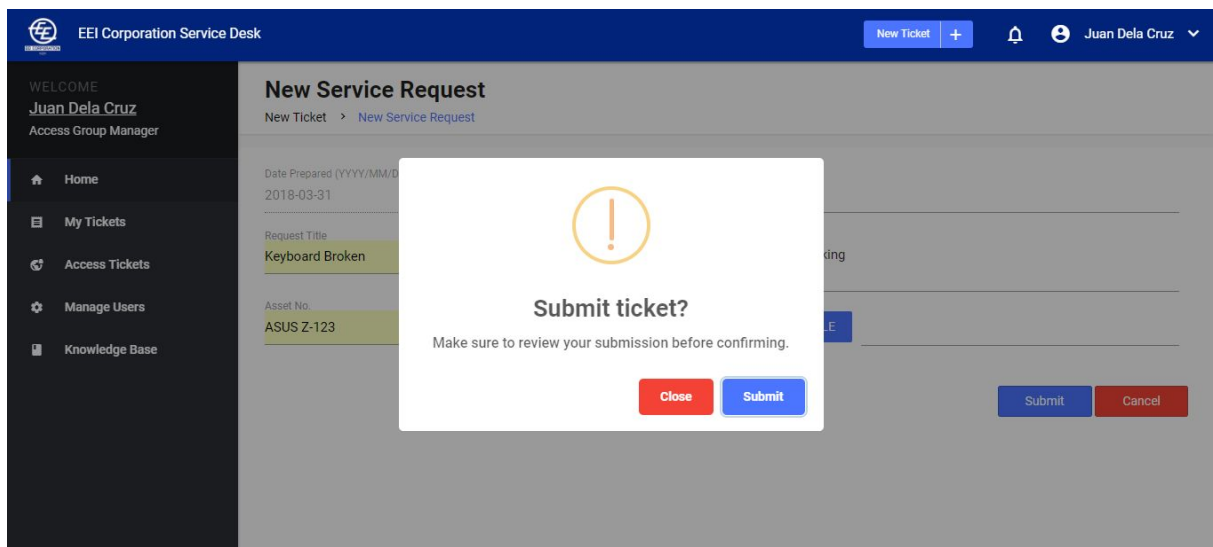


### I. For Service Request:

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.





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

The screenshot shows the 'New Service Request' form in the EEI Corporation Service Desk. A modal window is displayed in the center with a green checkmark icon and the text 'Ticket Submitted! Your ticket number is: 20180017'. The modal has an 'OK' button. In the background, the form fields are visible: 'Date Prepared (YYYY/MM/DD)' is 2018-03-31, 'Request Title' is 'Keyboard Broken', and 'Asset No.' is 'ASUS Z-123'. The 'Submit' button is highlighted in blue, and the 'Cancel' button is in red. The left sidebar shows the user 'Juan Dela Cruz' and the 'Access Group Manager' role. The top navigation bar includes a 'New Ticket' button and a user profile dropdown.

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

The screenshot shows the 'My Tickets' page in the EEI Corporation Service Desk. The page displays a table with one ticket. The ticket is highlighted with a red border. The table has columns: Ticket #, Status, Title, Date Created, and Remarks. The ticket details are: Ticket # 20180017, Status New, Title Finance, Date Created 2018-04-02 08:00:00. The left sidebar shows the user 'Juan Dela Cruz' and the 'Access Group Manager' role. The top navigation bar includes a 'New Ticket' button and a user profile dropdown.

Ticket #	Status	Title	Date Created	Remarks
20180017	New	Finance	2018-04-02 08:00:00	

## 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): 2018-03-31
- R.C. Number: 1234
- Request Title: Lotus Notes Access for team
- Company: EEI Corporation
- Expiry Date: 26/07/2018
- Department/Project: MRT-7 Project

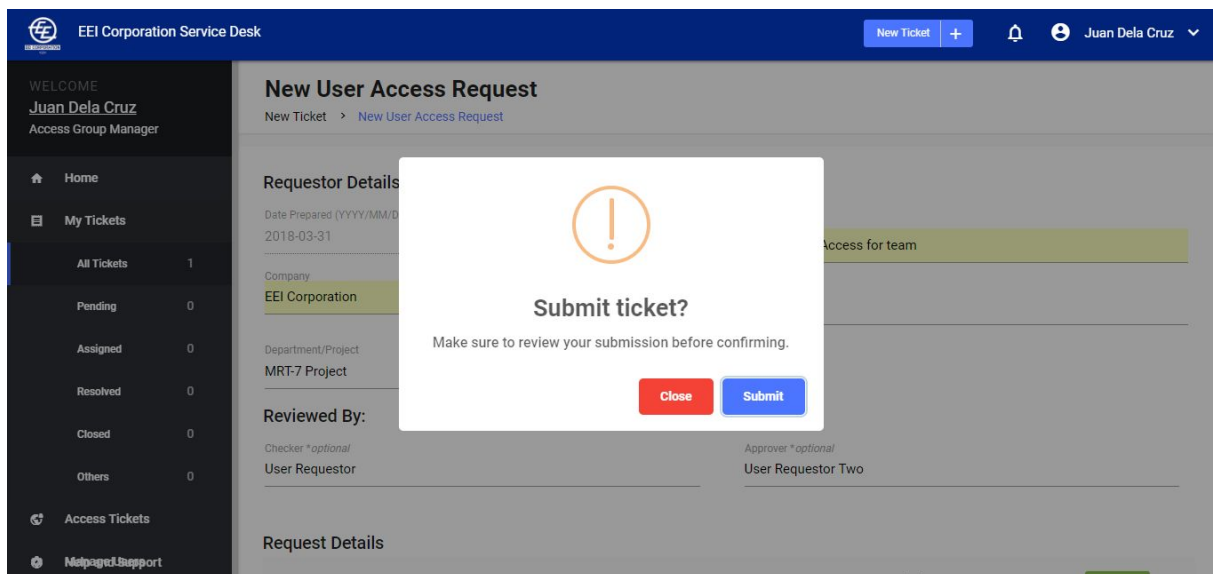
**Reviewed By:**

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

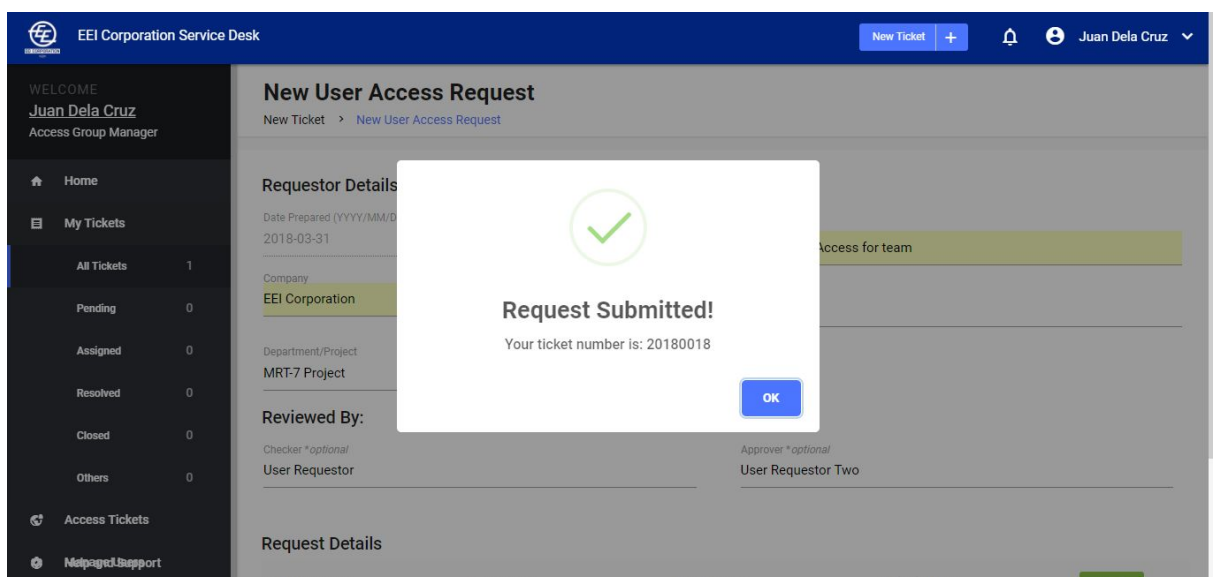
**Request Details:**

Full Name of User	Request Type	Access Request	Application Name	
Donna Dumaliang	New	Admin	Lotus	<a href="#">+ Add Row</a>

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

**My Tickets**

My Tickets > All My Tickets

5 tickets

Clear Category Severity Filter Buttons

Search Button Search Here

Ticket #	Status	Title	Date Created	Remarks
20180006	New	Project Team Access	2018-04-02 08:00:00	
20180005	New	Project Team Access	2018-04-02 08:00:00	
20180004	New	Project Team Access	2018-04-02 08:00:00	
20180003	New	Scanner Broken	2018-04-01 12:38:39	
20180002	New	Monitor broken	2018-04-01 12:31:06	

Table Sorter

Filter by Status

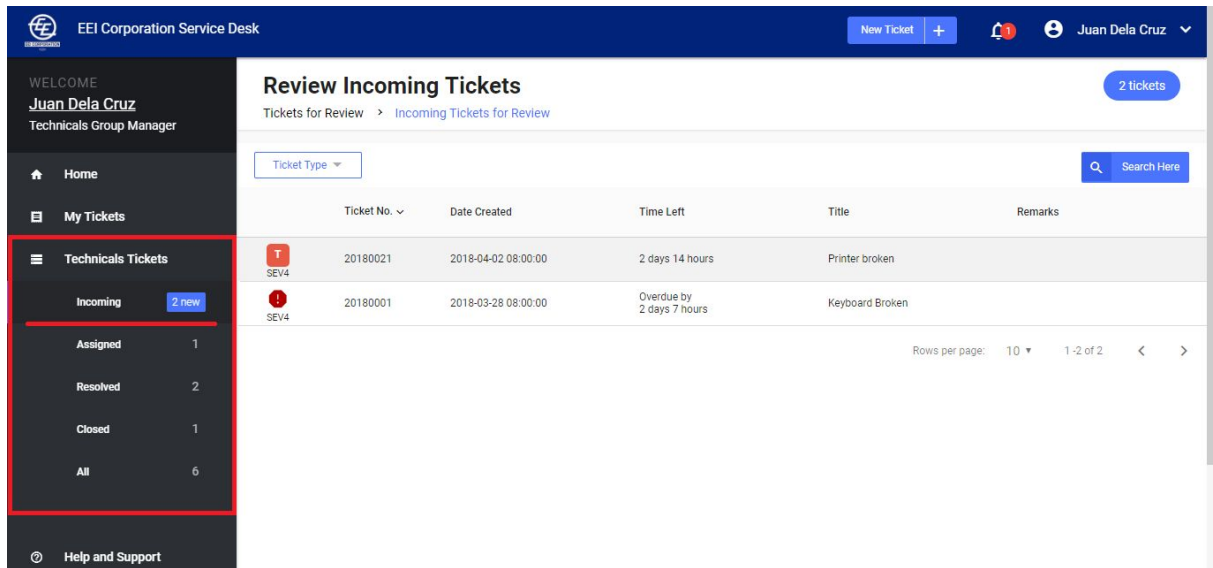
Rows per page: 10 1-5 of 5

- 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. Technicals Tickets

### I. Assign to ticket agent

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



WELCOME  
Juan Dela Cruz  
Technicals Group Manager

Home  
My Tickets  
**Technicals Tickets**  
Incoming **2 new**  
Assigned 1  
Resolved 2  
Closed 1  
All 6  
Help and Support

### Review Incoming Tickets

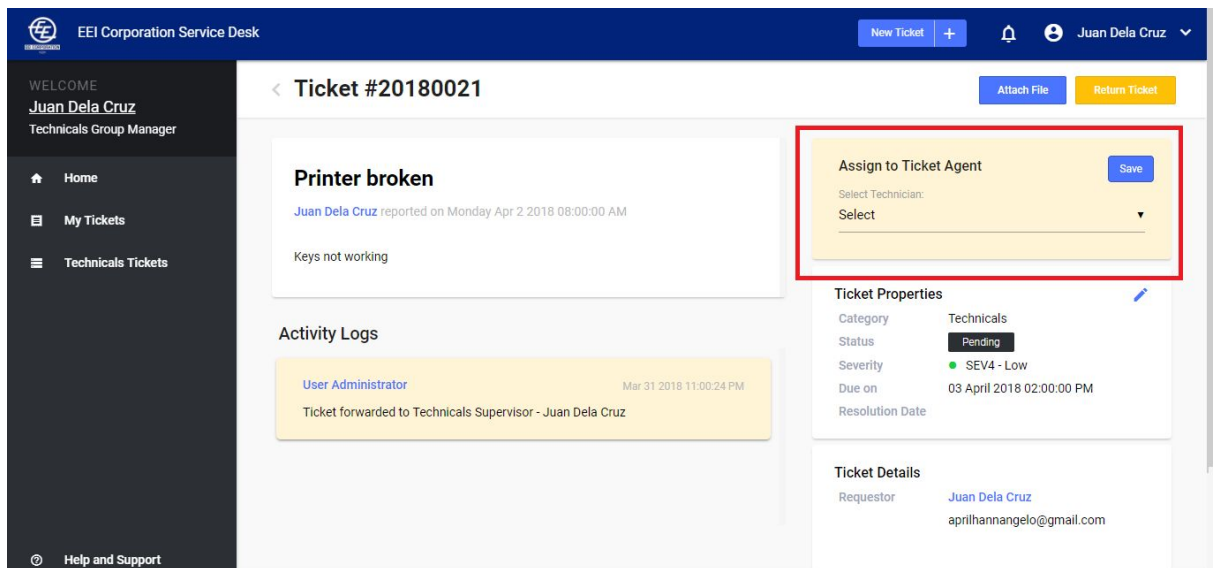
Tickets for Review > Incoming Tickets for Review

Ticket Type Search Here

	Ticket No. ▾	Date Created	Time Left	Title	Remarks
T SEV4	20180021	2018-04-02 08:00:00	2 days 14 hours	Printer broken	
SEV4	20180001	2018-03-28 08:00:00	Overdue by 2 days 7 hours	Keyboard Broken	

Rows per page: 10 ▾ 1-2 of 2 < >

3. Assign the technician of the ticket by selecting the corresponding ticket agent of the ticket.



WELCOME  
Juan Dela Cruz  
Technicals Group Manager

Home  
My Tickets  
Technicals Tickets  
Help and Support

### Ticket #20180021

Attach File Return Ticket

#### Printer broken

Juan Dela Cruz reported on Monday Apr 2 2018 08:00:00 AM

Keys not working

#### Activity Logs

User Administrator Mar 31 2018 11:00:24 PM  
Ticket forwarded to Technicals Supervisor - Juan Dela Cruz

#### Assign to Ticket Agent

Select Technician:  
Select

Save

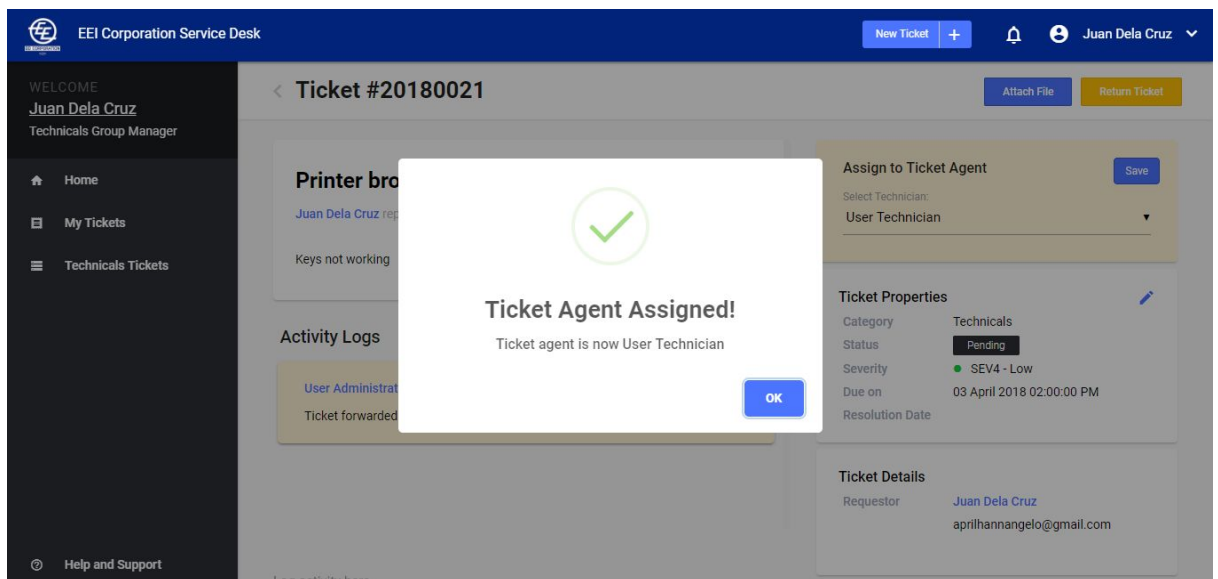
#### Ticket Properties

Category Technicals  
Status Pending  
Severity SEV4 - Low  
Due on 03 April 2018 02:00:00 PM  
Resolution Date

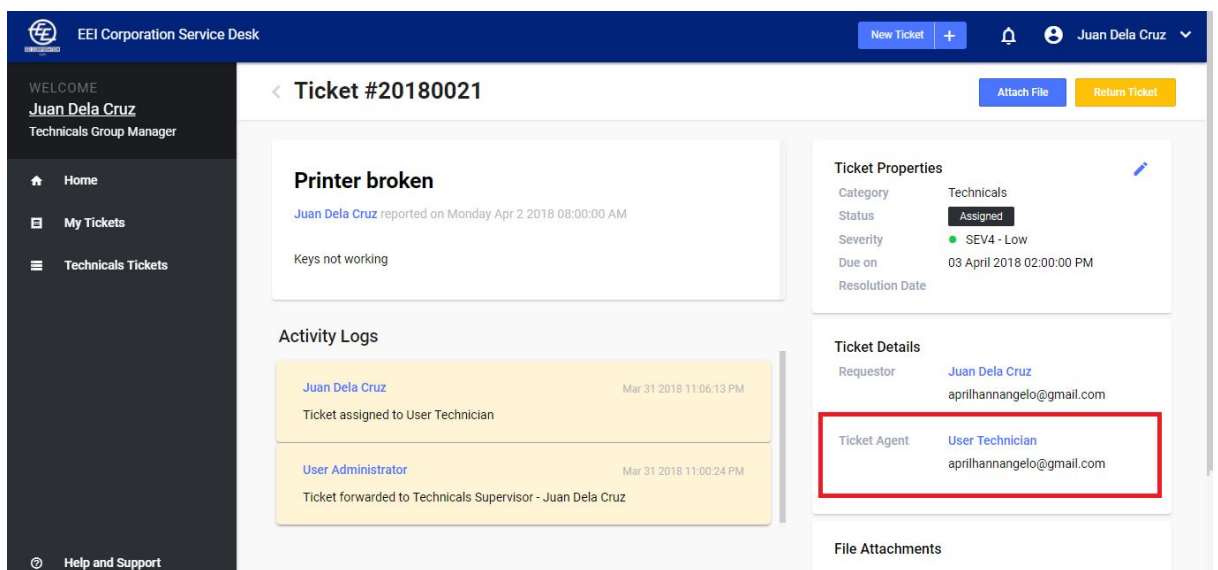
#### Ticket Details

Requestor Juan Dela Cruz  
aprilhannangelo@gmail.com

4. Click **“Save”** once ticket agent has been assigned



5. Once assigned, the details page of the ticket must show the newly assigned ticket agent under the box **“Ticket Details”**



## II. Resolve Ticket

1. Click “**Incoming Tickets**” or “**Assigned Tickets**” under Technicals tickets
2. Click the table row of the ticket you want to review to see all of its details

WELCOME  
Juan Dela Cruz  
Technicals Group Manager

Home  
My Tickets  
Technicals Tickets  
Incoming 2 new  
Assigned 1  
Resolved 2  
Closed 1  
All 6  
Help and Support

### Review Incoming Tickets

Tickets for Review > Incoming Tickets for Review

2 tickets

Ticket Type

Search Here

	Ticket No.	Date Created	Time Left	Title	Remarks
T SEV4	20180021	2018-04-02 08:00:00	2 days 14 hours	Printer broken	
! SEV4	20180001	2018-03-28 08:00:00	Overdue by 2 days 7 hours	Keyboard Broken	

Rows per page: 10 1-2 of 2

3. In the “**Ticket Properties**” panel of the ticket details page, click the blue pencil icon to edit the ticket properties

WELCOME  
Juan Dela Cruz  
Technicals Group Manager

Home  
My Tickets  
Technicals Tickets  
Help and Support

### Ticket #20180009

Return Ticket

#### Keyboard Broken

User Requestor reported on Wednesday Mar 28 2018 09:45:37 AM

hi

#### Activity Logs

Juan Dela Cruz technician Mar 28 2018 09:55:29 AM

Juan Dela Cruz Ticket assigned to User Technician Mar 28 2018 09:55:05 AM

#### Ticket Properties

Category Technicals  
Status Assigned  
Severity SEV2 - Important  
Due on 28 March 2018 02:00:00 PM  
Resolution Date

#### Ticket Details

Requestor User Requestor aprilhannangelo@gmail.com  
Ticket Agent User Technician aprilhannangelo@gmail.com

#### File Attachments

4. Resolve ticket by changing the selected value of the dropdown for **Ticket Status**. In doing so, an input field will appear **requiring you to log the activity you performed** to resolve the ticket.

The screenshot shows the EEI Corporation Service Desk interface. A modal titled "Edit Ticket Properties" is open. It contains the following fields:

- Ticket Status:** A dropdown menu with "Resolved" selected.
- Activity Log:** A text input field with "Contacted vendor" entered.
- Ticket Category:** A dropdown menu with "Technicals" selected.
- Severity Level:** A dropdown menu with "SEV2" selected.

A "Save" button is located at the bottom right of the modal. In the background, the ticket details are visible, including the status "Assigned", severity "SEV2 - Important", and the date "28 March 2018 02:00:00 PM". The user "Juan Dela Cruz" is logged in.

5. Click **“Save”** to proceed.

The screenshot shows the EEI Corporation Service Desk interface after the "Save" button was clicked. A confirmation message is displayed in the center of the screen:

**New ticket properties saved!**

An "OK" button is located at the bottom right of the confirmation message. The background shows the "Edit Ticket Properties" modal with the "Save" button highlighted.



- The changes should reflect in the ticket details page. (ticket status, activity log, and resolution date)

WELCOME  
Juan Dela Cruz  
Technicals Group Manager

Home  
My Tickets  
Technicals Tickets

Help and Support

### Ticket #20180009

#### Keyboard Broken

User Requestor reported on Wednesday Mar 28 2018 09:45:37 AM

hi

#### Activity Log

Juan Dela Cruz  
Resolved - Contacted vendor  
Mar 31 2018 11:24:07 PM

Juan Dela Cruz  
technician  
Mar 28 2018 09:55:29 AM

#### Ticket Properties

Category: Technicals  
Status: **Resolved**  
Severity: Sev2 - Important  
Due on: 31 March 2018 02:00:00 PM  
Resolution Date: **31 March 2018 11:24:07 PM**

#### Ticket Details

Requestor: User Requestor  
aprilhannangelo@gmail.com

Ticket Agent: User Technician  
aprilhannangelo@gmail.com

File Attachments

### III. Return Ticket to Service Desk Agent

- Click “**Incoming Tickets**” or “**Assigned Tickets**” under Technicals tickets
- Click the table row of the ticket you want to review to see all of its details

WELCOME  
Juan Dela Cruz  
Technicals Group Manager

Home  
My Tickets  
Technicals Tickets

Help and Support

### Review Incoming Tickets

Tickets for Review > Incoming Tickets for Review

2 tickets

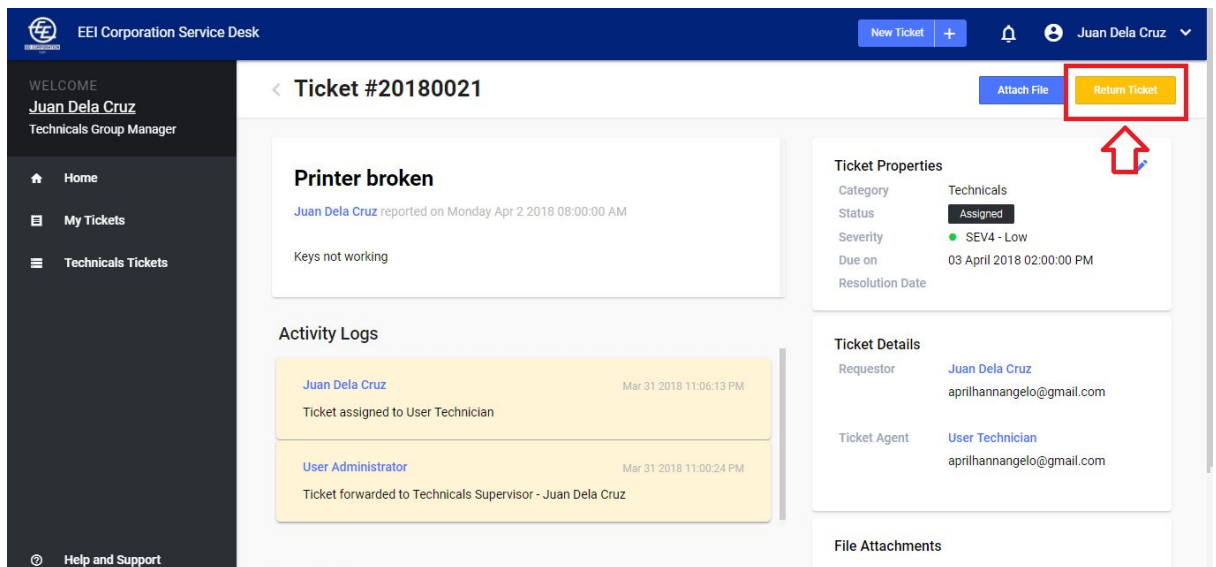
Ticket Type

Search Here

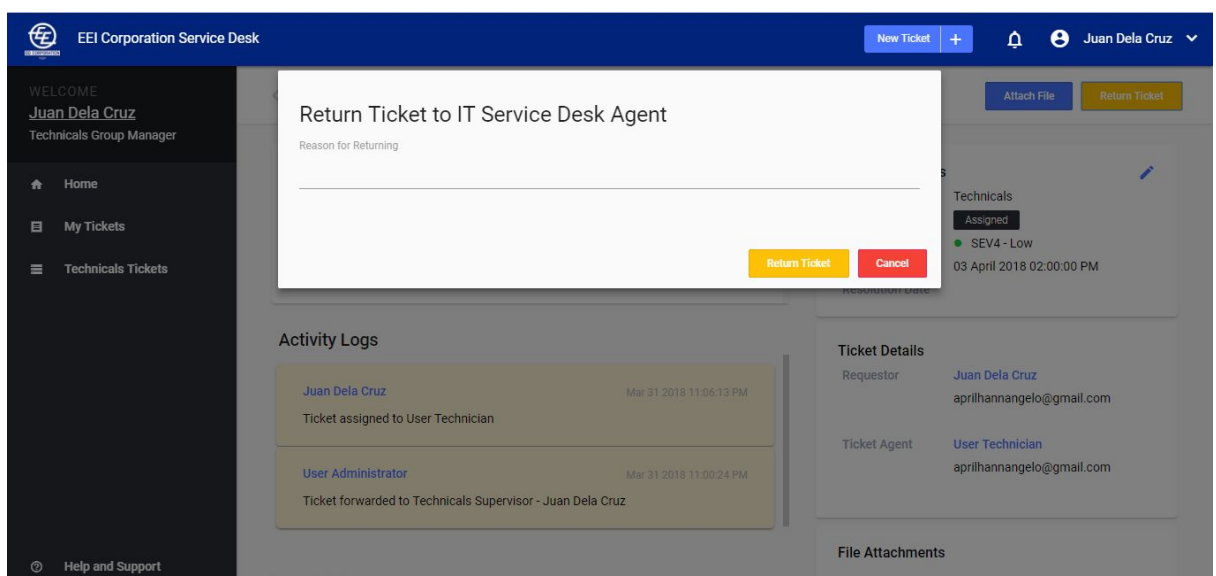
	Ticket No. ▾	Date Created	Time Left	Title	Remarks
T SEV4	20180021	2018-04-02 08:00:00	2 days 14 hours	Printer broken	
I SEV4	20180001	2018-03-28 08:00:00	Overdue by 2 days 7 hours	Keyboard Broken	

Rows per page: 10 ▾ 1-2 of 2 < >

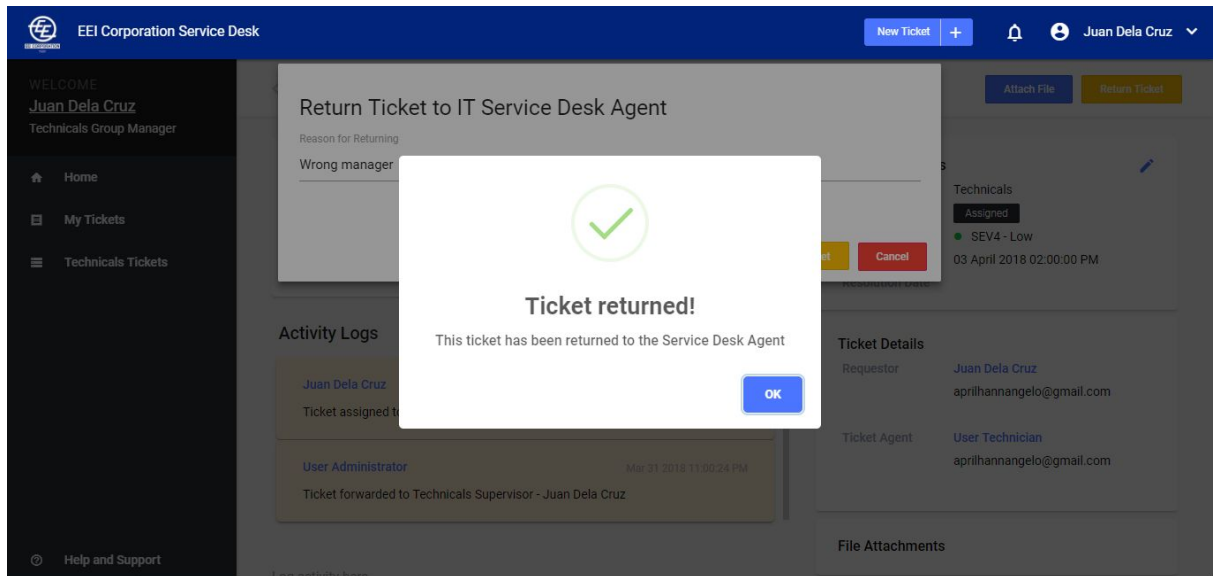
- On the upper right hand corner of the **details** page of the ticket, click “**Return Ticket**”.



4. On the modal, input reason for returning ticket to Service Desk Agent
  - *Note: Only tickets with valid reasons shall be returned back to the Service Desk Agent (e.g. Wrong manager)*

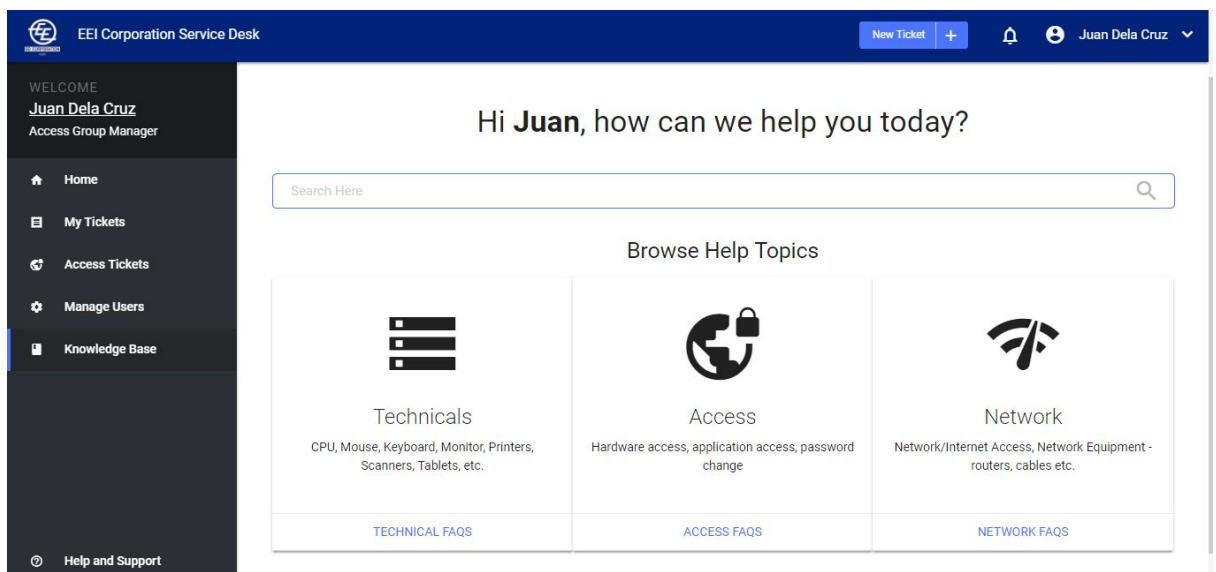


5. Click **“Return Ticket”**. The ticket should not be in the technicals ticket page after this.



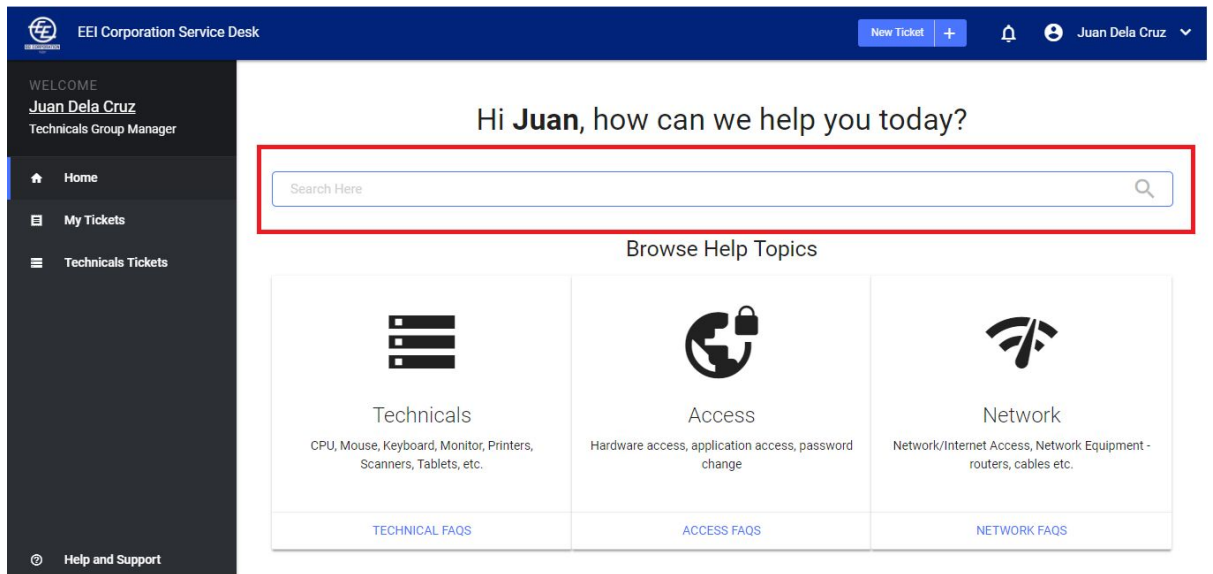
## E. Knowledge Base

The Knowledge Base Section for the Technicals Group Manager is similar to that of a regular user. He/She can search and view the list of articles. Any new article suggestions should be discussed with the administrator of the system for consideration.

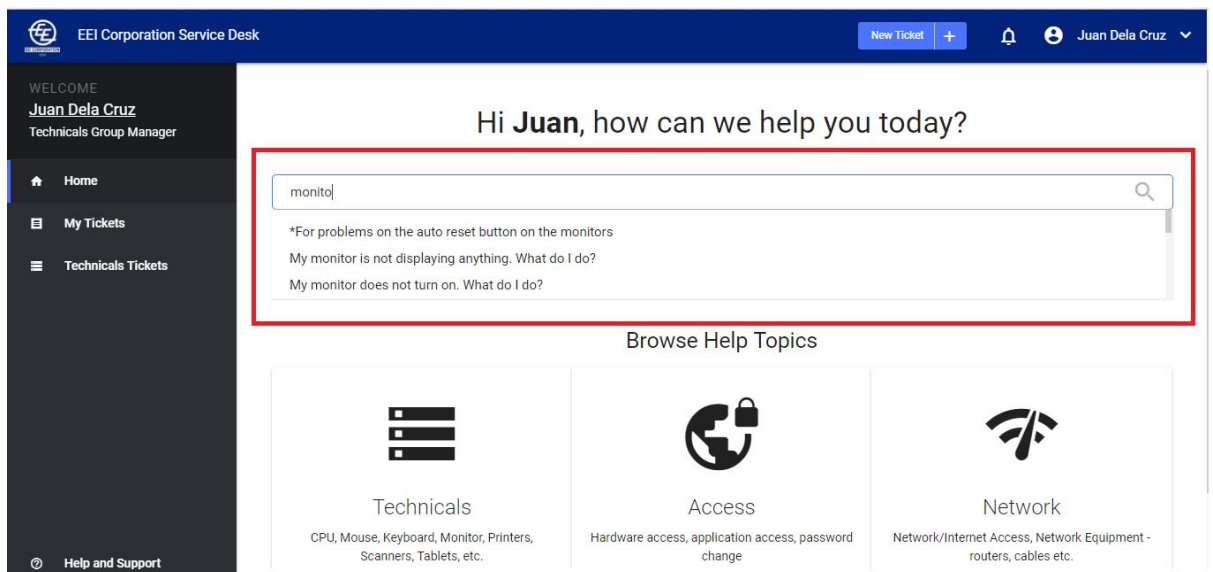


## I. Search Article

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



2. Click the article title you wish to view



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

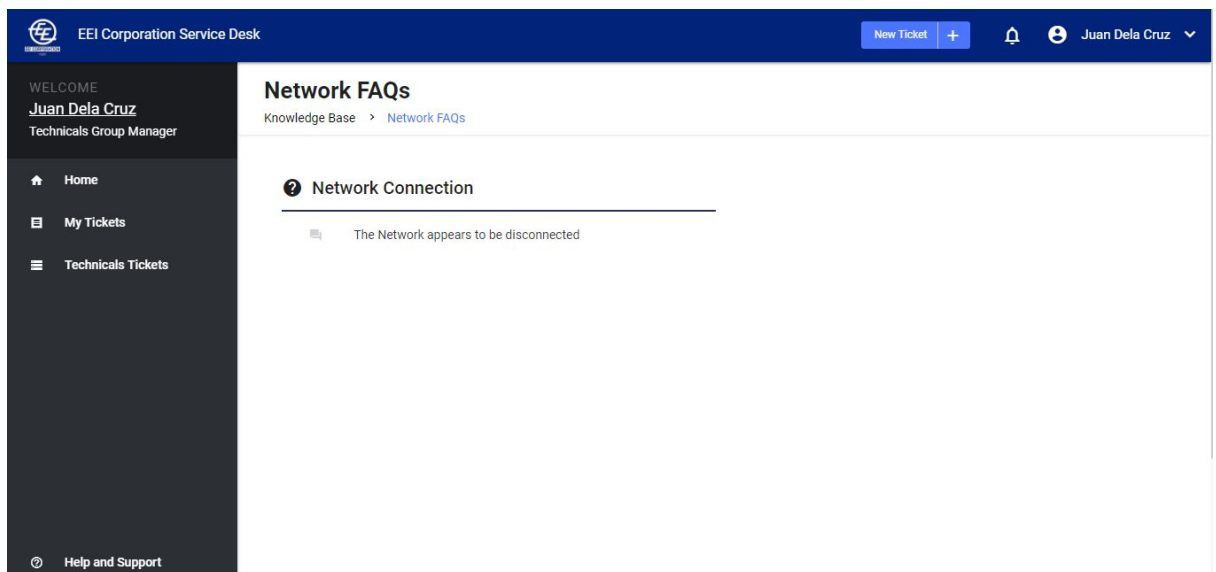
The screenshot shows the 'Technicals FAQ #5' page in the EEI Corporation Service Desk. The left sidebar contains a welcome message for Juan Dela Cruz, a 'Technicals Group Manager', and navigation links for Home, My Tickets, and Technicals Tickets. The main content area is titled 'Technicals FAQ #5' and includes a breadcrumb trail: Knowledge Base > Technicals FAQ > Technicals FAQ #5. Below the title, a section header reads '\*For problems on the auto reset button on the monitors'. A list of four steps is provided: 1. Please check if power cable is plugged in. Is it plugged in? 2. Please check if cables are properly inserted. Are they inserted properly? 3. Please check AVR And UPS. Are they running? 4. If the problem still persists, kindly accomplish service request form.

## II. View Article List

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

The screenshot shows the main page of the EEI Corporation Service Desk knowledge base. The left sidebar is identical to the previous screenshot. The main content area features a greeting 'Hi Juan, how can we help you today?' and a search bar labeled 'Search Here'. Below the search bar, a section titled 'Browse Help Topics' is highlighted with a red border. This section contains three cards: 'Technicals' (with a server icon and description: CPU, Mouse, Keyboard, Monitor, Printers, Scanners, Tablets, etc.), 'Access' (with a globe icon and description: Hardware access, application access, password change), and 'Network' (with a Wi-Fi icon and description: Network/Internet Access, Network Equipment - routers, cables etc.). Each card has a corresponding link at the bottom: TECHNICAL FAQs, ACCESS FAQs, and NETWORK FAQs.

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

