

USER MANUAL

ONLINE SERVICE DESK SYSTEM

EEI CORPORATION ONLINE SERVICE DESK SYSTEM

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 <u>access group</u> <u>manager</u> 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?

EEI 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 of the entire company having a severe impact on IT services availability.	4 hours
SEV2	Important	Incident reports that resulting to interruption of operation of a specific department/project 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 of the company.	48 hours

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

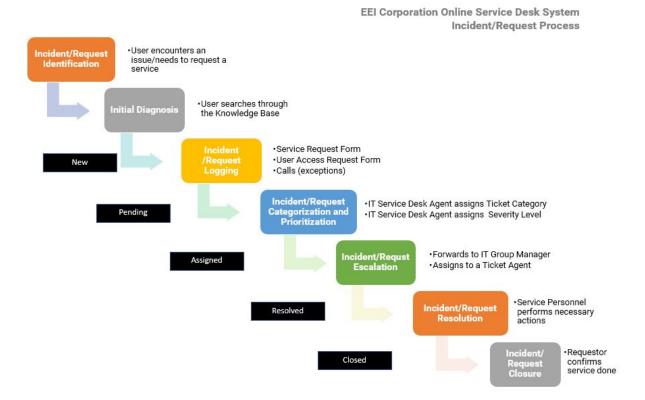
- An assigned ticket is a ticket which the respective IT group manager has assigned to a specific ticket agent (technician/network engineer)
- 7. Resolved

 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 <u>and</u> 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?



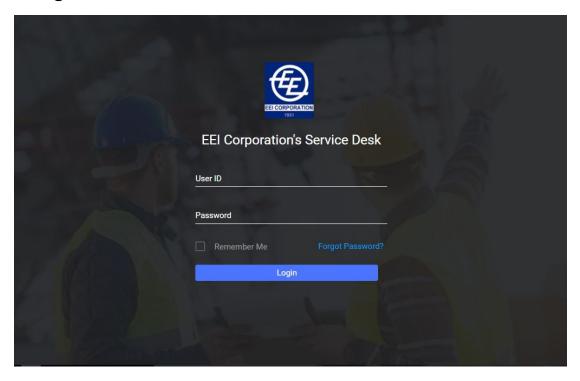
G. Glossary of Terms

Ticket	An electronic documentation of a concern or an issue
Service Ticket	A ticket for techncials concerns including: printer, hardware, scanner, mouse, keyboard among others
User Access Ticket	A ticket for application or network access; includes the signatures of the approver (required for all) and checker (optional)
Ticket Agent	The service team member assigned to resolve a

	ticket
Checker	The assigned person to check the ticket details
	before the ticket is forwarded to the approver.
	Usually applicable for projects
Approver	The assigned approver of a user access ticket after
	it has been checked by the checker (if there is).
	Usually the project manager or the direct
	supervisor of the employee.
Open Ticket	A general term which refers to tickets that have the
	status of: Pending, Assigned and Resolved.
Closed Ticket	Refers to tickets that are already closed.

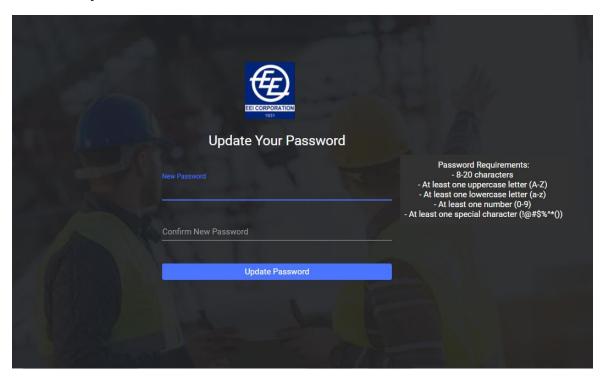
II. GENERAL

A. Log In



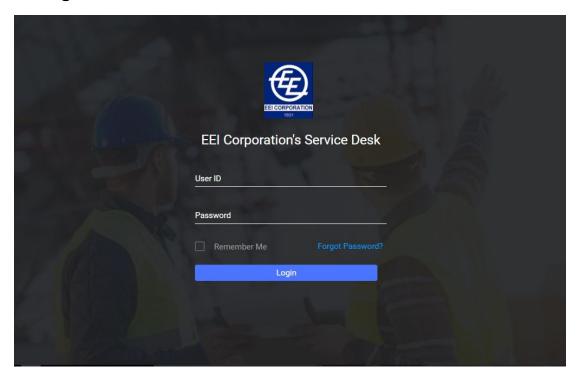
- 1. Enter your official EEI user id and password
 - a. What is my official EEI user id?
 - i. Your official user id is the first letter of your first name and your full last name (or your email handle without @eei.com.ph)
 - ii. Example:
 - 1. Name: Juan B. Dela Cruz
 - 2. Username: jbdelacruz
- 2.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

B. Update Password

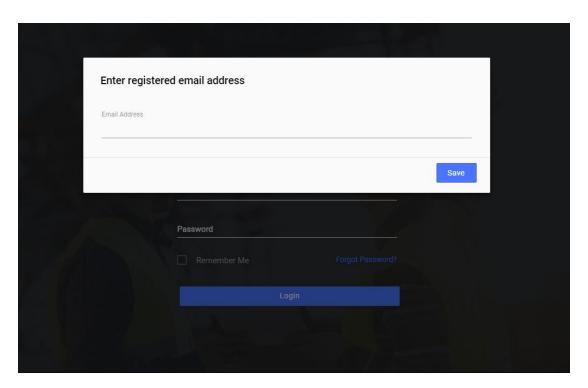


- 1. On your first login, you will be **required** to **change** your password
- 2. Password requirements are as follows:
 - a. 8-20 characters
 - b. At least one uppercase letter (A-Z)
 - c. At least one lowercase letter (a-z)
 - d. At least one number (0-9)
 - e. At least one special character [!@#\$%^&*(]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

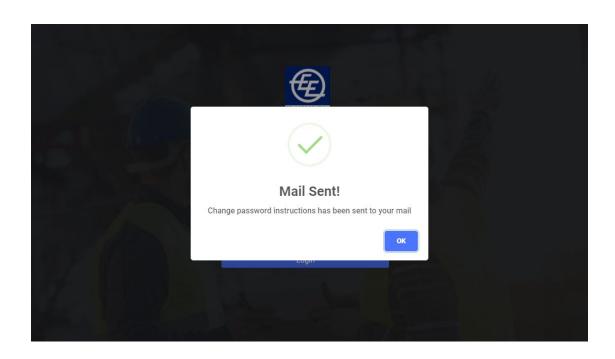
C. Forgot Password



1. On the login page, click "Forgot Password" link above the login button

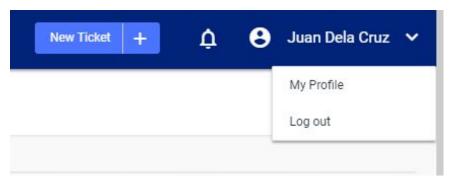


- 2. Enter your registered EEI e-mail address
- 3. Click "Save"
- 4. An e-mail will be sent to the e-mail address you entered for instructions on resetting your password.

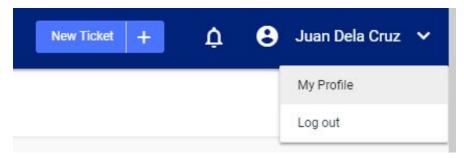


D. My Profile

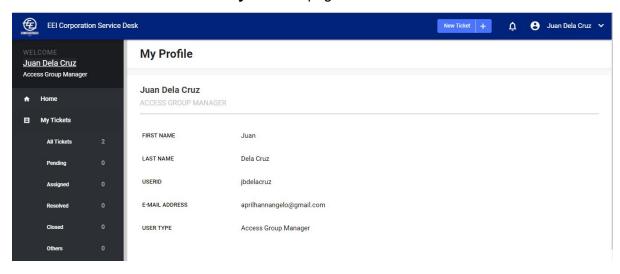
1. Click your name on the upper right hand corner of the screen



2. Click "My Profile" to view your account and basic information

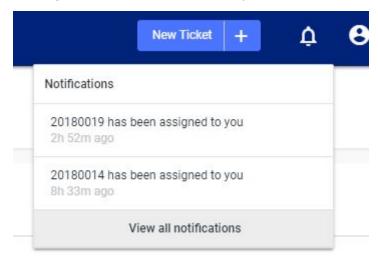


3. You will be redirected to "My Profile" page

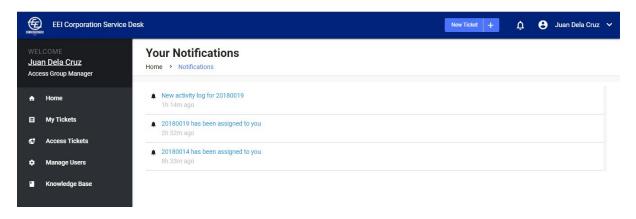


E. Notifications

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

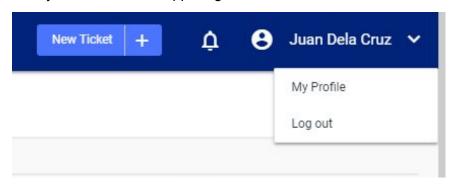


To view the complete list of all your notifications, click "View all Notifications"

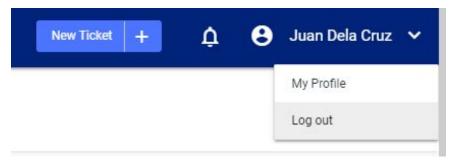


F. Log Out

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

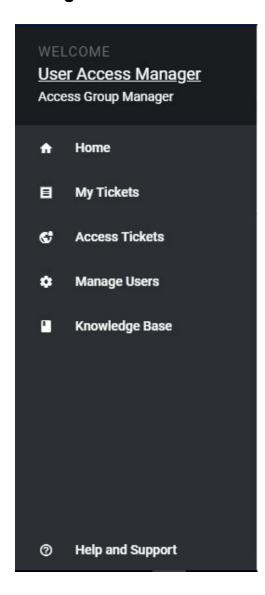


2. Click "Logout"



I. ACCESS GROUP MANAGER

A. Navigation



Home

 Displays the Dashboard Analytics summary of all tickets submitted (same with Administrator)

My Tickets

Displays all tickets you submitted

Access Tickets

Displays all tickets categorized as access

Manage Users

 Displays all available users of the Service Desk System

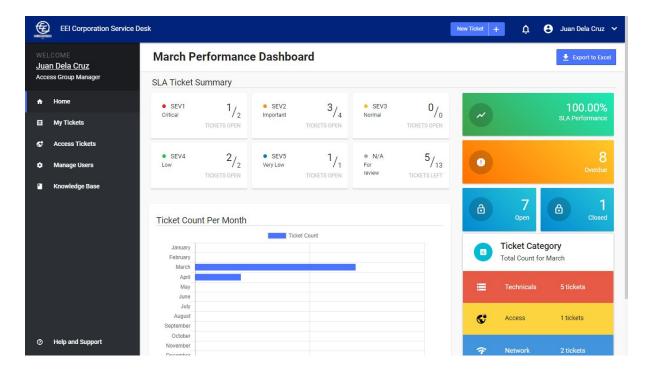
Knowledge Base

 Page showing a list of all Frequently Asked Questions with solutions which can be performed by the general users

Help and Support

B. Performance Dashboard

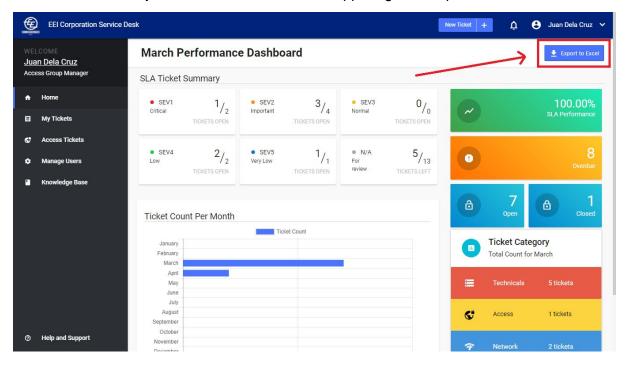
The **Performance Dashboard** page shows the summary of the number of tickets per category, severity level of the current month



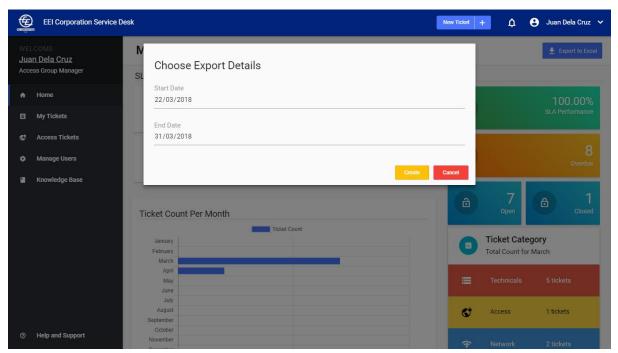
- SLA Ticket Summary shows the count of open tickets over the total number of tickets per severity level
- SLA Performance shows the percentage of tickets resolved within the specified SLA(Service Level Agreement). A high SLA performance means that the Service Team is meeting their target SLAs while a low SLA performance means the opposite.
- Open Tickets refer to all the tickets that have the status of Pending,
 Assigned and Resolved
- Closed Tickets refer to all tickets that have the status of Closed
- Ticket Count per Month refers to the count of all tickets submitted per month

I. Export Report

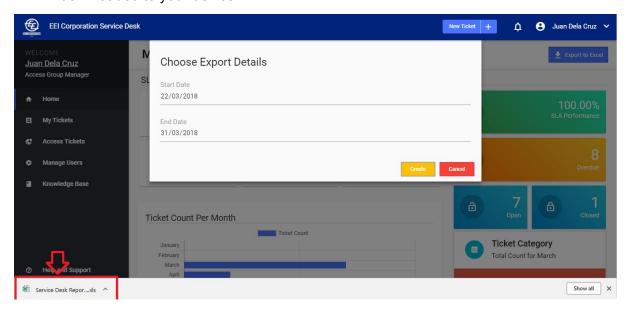
- The export function allows the administrator to download the dashboard summary and the tickets of the specified date range
- 1. Click the "Export to Excel" button on the upper right hand part of the screen



2. A modal will pop out for you to select the date range of the report you wish to export. Indicate the start date and end date.

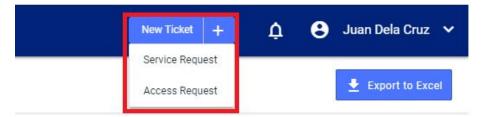


3. Click the "Create" button to proceed with download. An .xls file will be downloaded to your device.



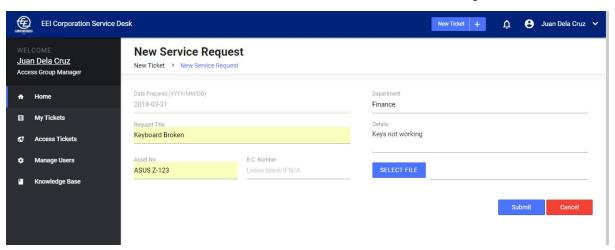
C. Submitting a New Ticket

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

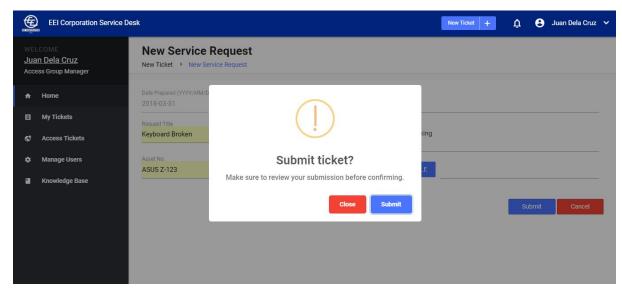


For Service Request:

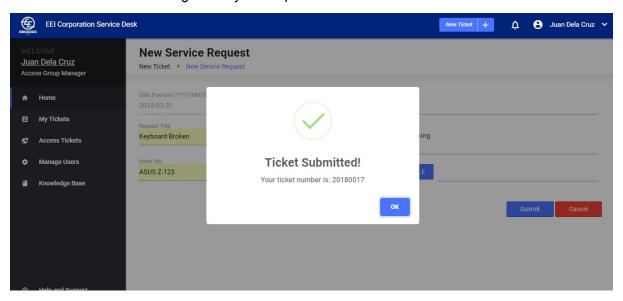
- 1. Fill out the digital service request form.
- 2. Attach a file or screenshot if possible.
- 3. Click "Submit". Make sure to review the details before submitting.



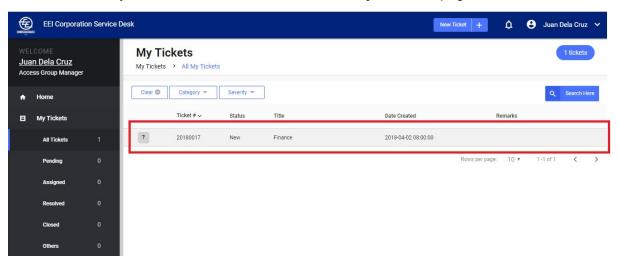
4. A confirmation box will pop out after you click the "Submit" button.



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

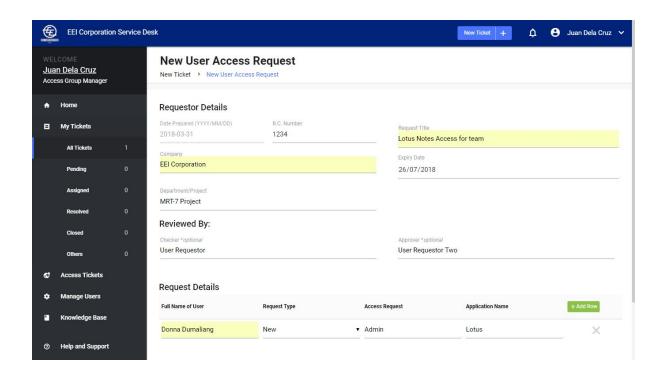


6. Your newly submitted ticket can be found on "My Tickets" page

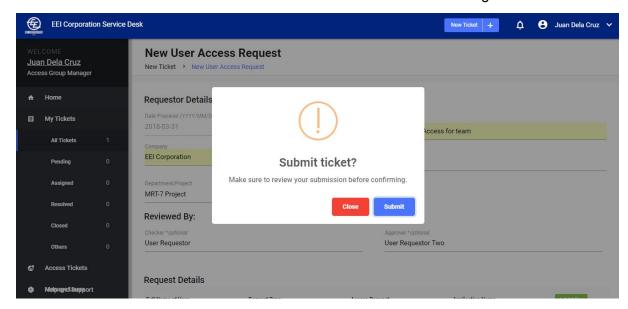


For User Access Request:

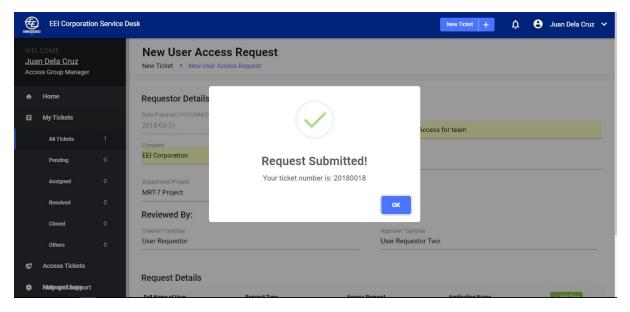
- Fill out the digital service request form. The form has 3 sections: Requestor Details, Reviewed By and Request Details
 - a. If needed, fill out the checker and/or approver fields under the "Reviewed By" section of the form
 - Note: checker and approver must also have an account
 - b. Type the details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



2. Click "Submit". Make sure to review the details before submitting.



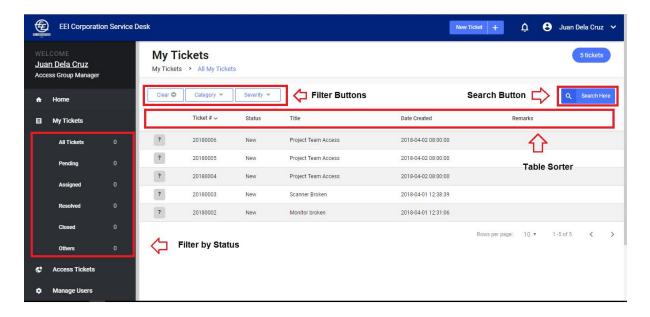
A confirmation box will pop out. Click "Submit" again to finally confirm your submission.



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.

D. My Tickets

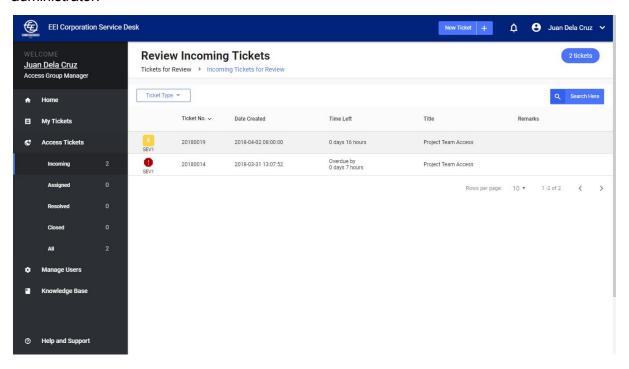
My Tickets page shows the list of all the tickets you submitted. You can filter your view by status, category or severity.



- 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
 - o 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.

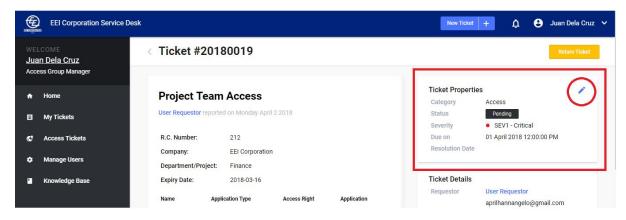
E. Access Tickets

The Access Tickets page shows all tickets categorized as access by the administrator.

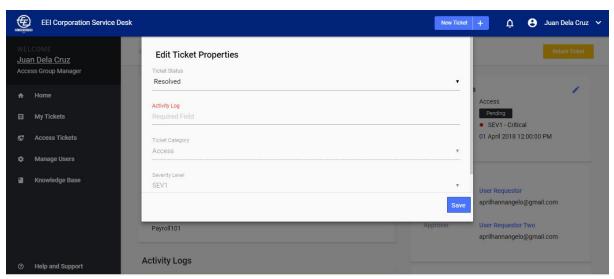


I. Resolve Ticket/Edit Ticket Properties

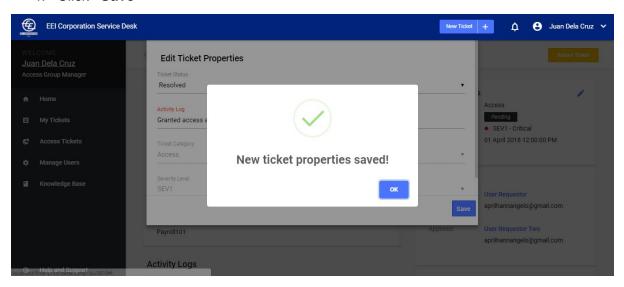
- Click the table row of the ticket
- 2. In the "Ticket Properties" panel, click the blue pencil icon



- A modal will pop out showing the ticket properties. Change the selected value of the Ticket Status dropdown by choosing "Resolved" status.
 - a. A required activity log field will be shown. Type the resolution done



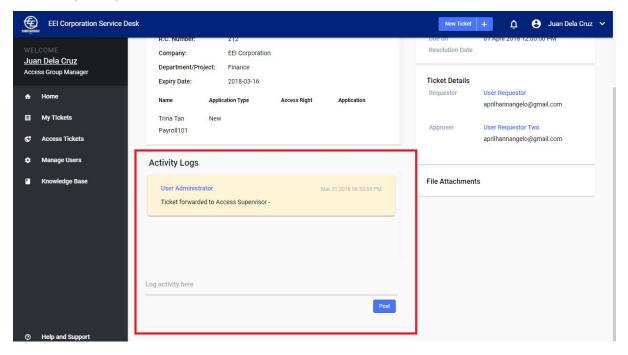
4. Click "Save"



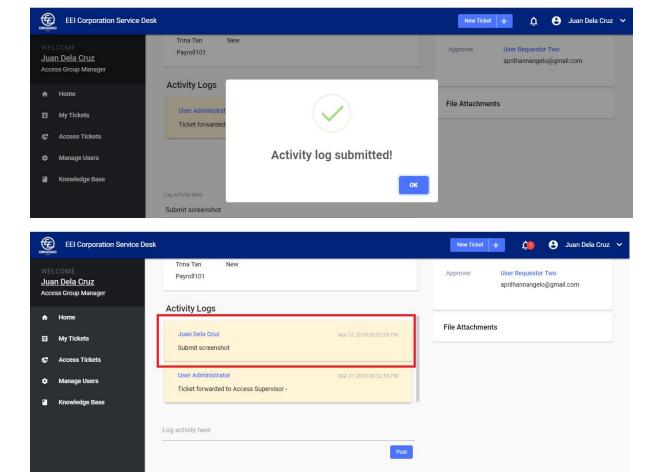
5. Ticket is now resolved.

II. Add Activity Log

1. In the **Activity Logs**" section of the ticket details page, log any activity done regarding the ticket in the input field.

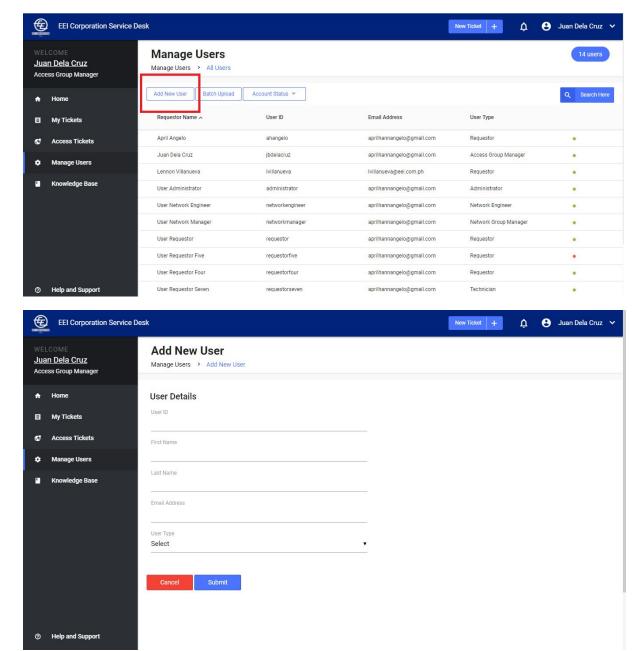


2. Click "Post" to submit activity log

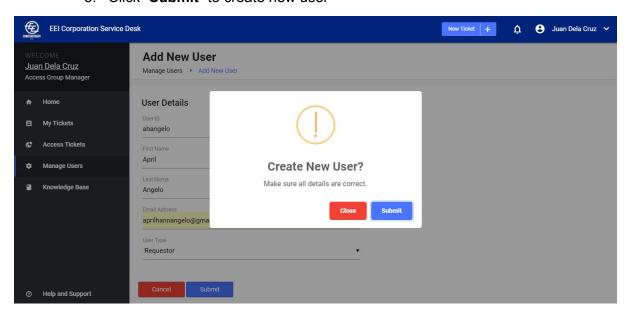


F. Manage Users

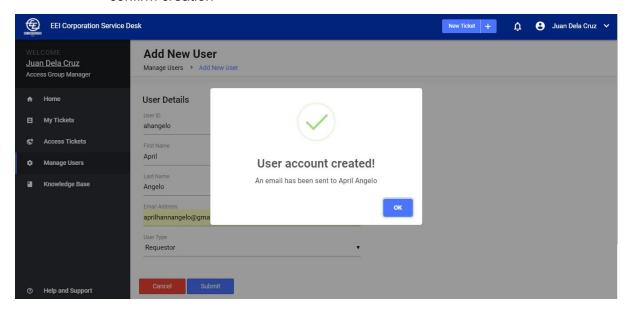
- I. Add New User
 - 1. Click "Manage Users" on the side bar
 - 2. Click "Add new user" and fill out the add new user form



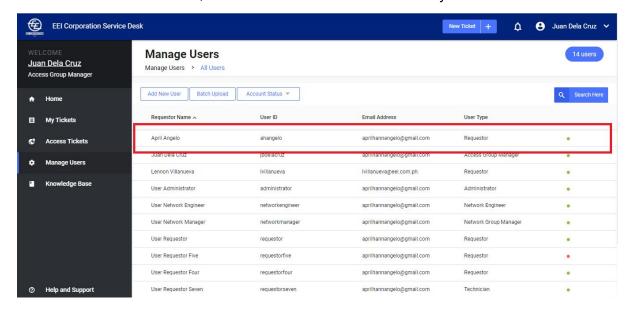
3. Click "Submit" to create new user



4. A modal will appear to confirm your submission. Click "Submit" to confirm creation

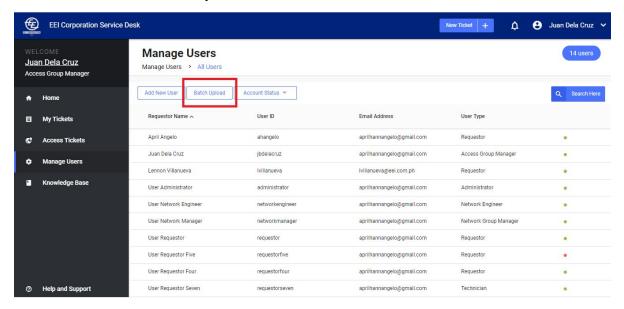


5. Once created, the list of users must show the newly created user

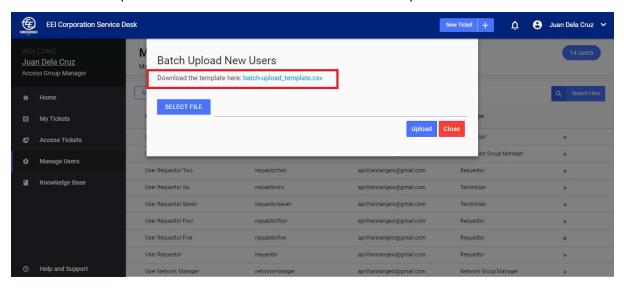


II. Batch Upload

- 1. Click "Manage Users" on the side bar
- 2. Click "Batch Upload"



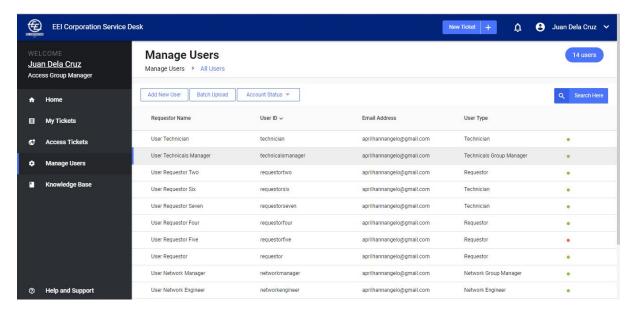
3. A modal will appear. To upload, click "Select File" to open the file explorer window and locate the .csv file to be uploaded



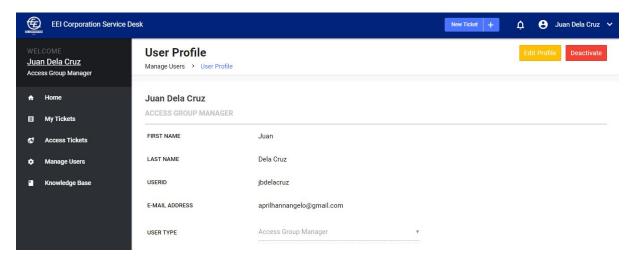
* Required template: Download the template attached first to ensure correct batch uploading

III. Deactivate Account

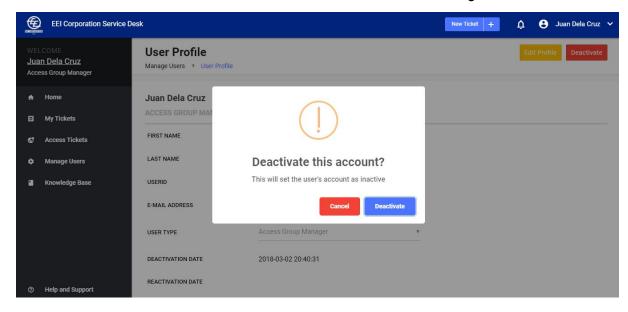
- 1. Click "Manage Users" on the side bar
- 2. Click the table row of the user you want to deactivate
 - a. Note: The colored circles beside the user type are account status indicators. A green indicator means a user account is active whereas a red indicator means a user account is deactivated.



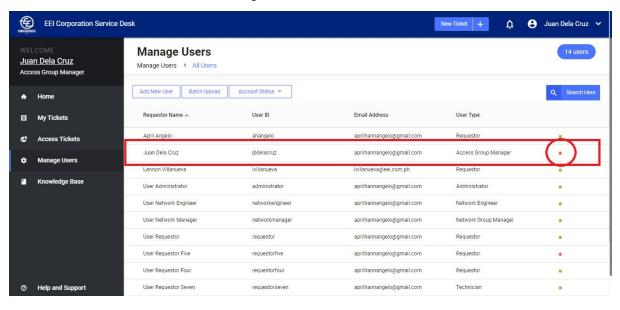
3. Click the "**Deactivate**" button found on the upper right hand part of the screen.



4. To confirm deactivation, click the "Deactivate" button again

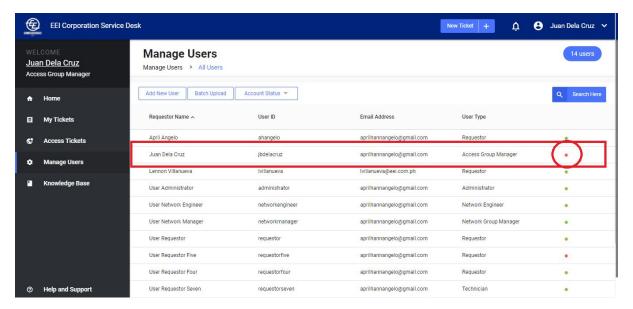


5. Once deactivated, the green indicator should turn red

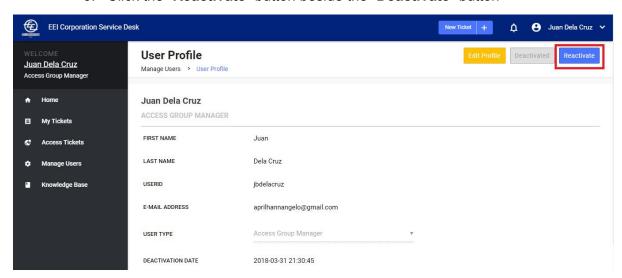


IV. Reactivate Account

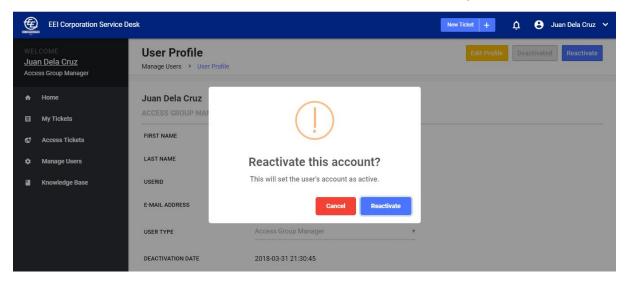
- 1. Click "Manage Users" on the side bar
- 2. Click the table row of the user you want to deactivate
 - a. Note: The colored circles beside the user type are indicators. A green indicator means a user is active whereas a red indicator means a user is inactive.



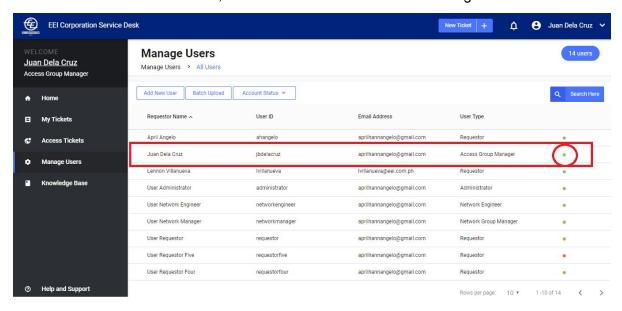
3. Click the "Reactivate" button beside the "Deactivate" button



4. To confirm deactivation, click the "Reactivate" button again

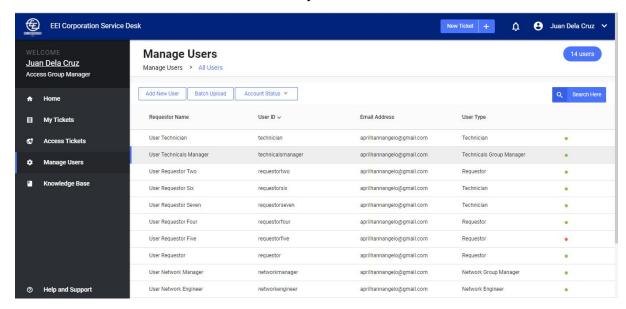


5. Once reactivated, the red indicator should turn back to green

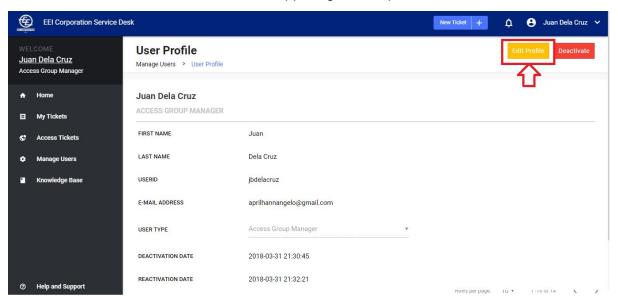


V. Edit Profile

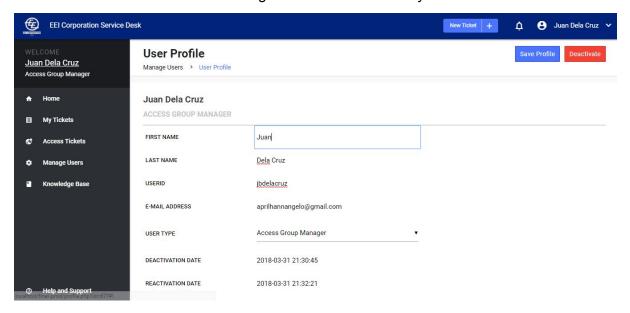
- 1. Click "Manage Users" on the side bar
- 2. Click the table row of the user you want to edit



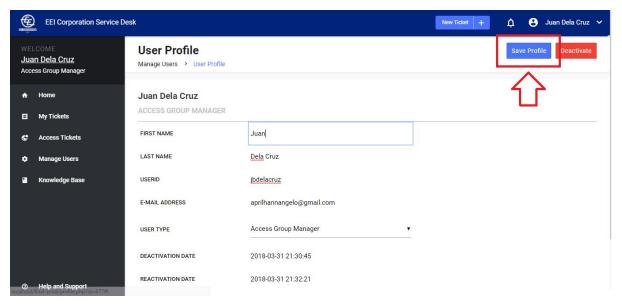
3. Click "Edit Profile" on the upper right hand part of the screen



4. This allows inline editing. Click on the table cell you wish to edit.

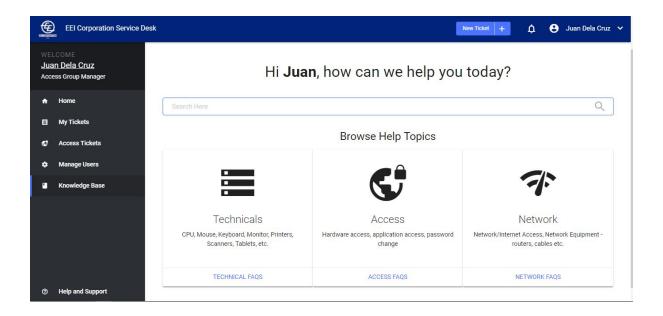


5. Click "Save Profile" on the upper right hand part of the screen to save the edits you made.



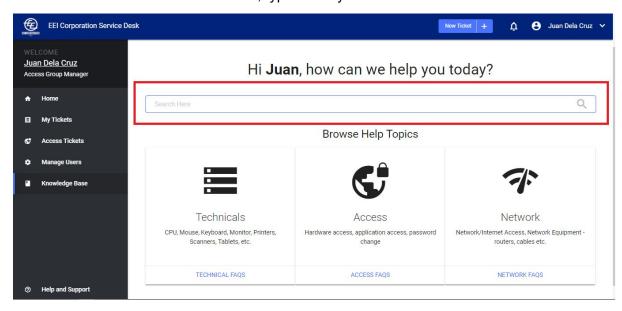
G. Knowledge Base

The Knowledge Base Section for the Access 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.

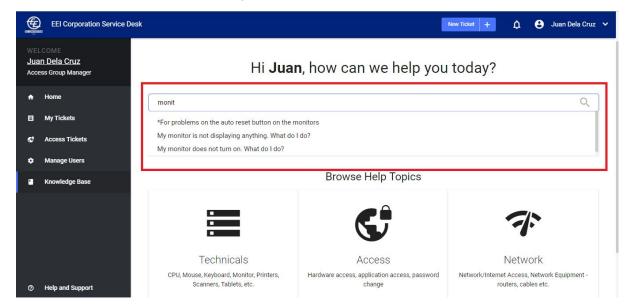


I. Search Article

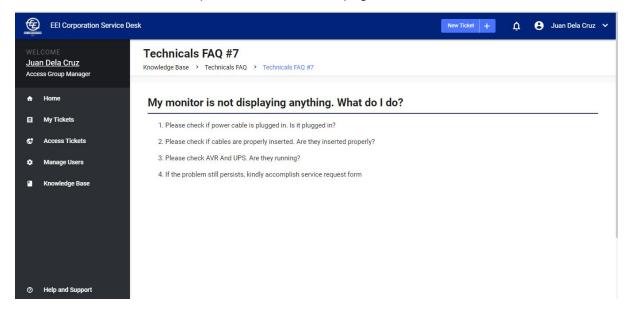
1. To search for an article, type the keywords in the search bar.



2. Click the article title you wish to view

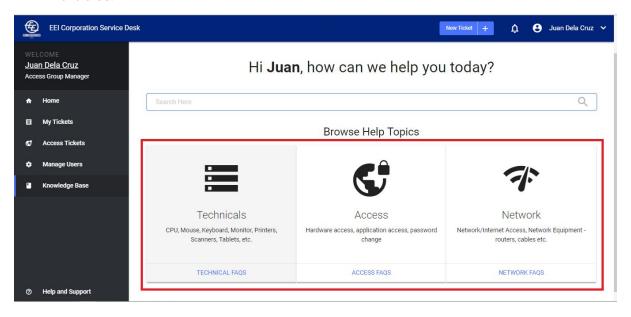


3. Follow the steps found in the article page

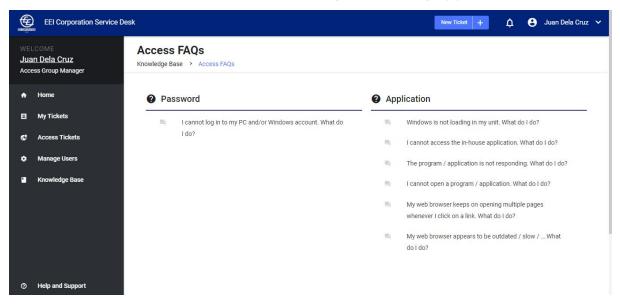


II. View Article List

 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

