EEI CORPORATION
1931

USER
MANUAL

ONLINE SERVICE DESK SYSTEM

EEI CORPORATION
ONLINE SERVICE DESK SYSTEM
USER MANUAL

ABOUT THIS DOCUMENT

This user manual contains all the necessary information for the **technician/network engineer** 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.

TABLE OF CONTENTS

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?

EEI Corporation Online Service Desk System
Incident/Request Process
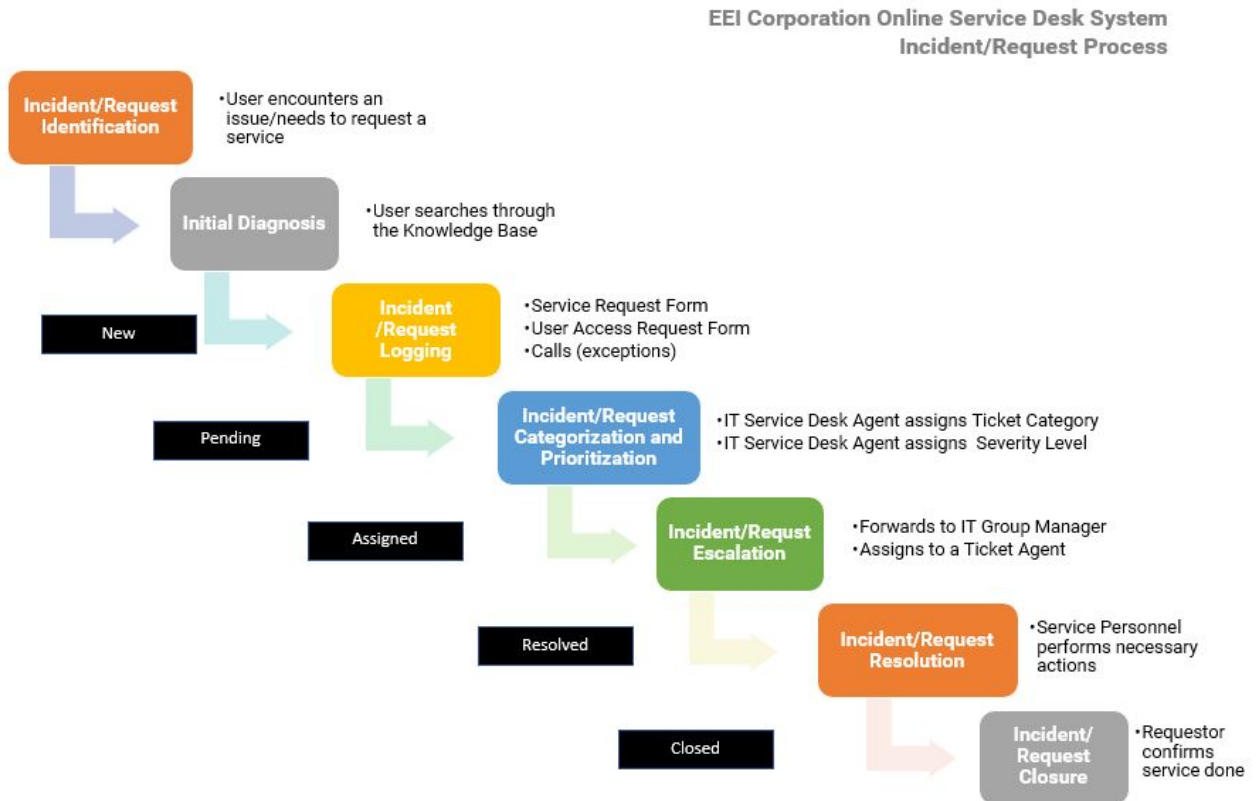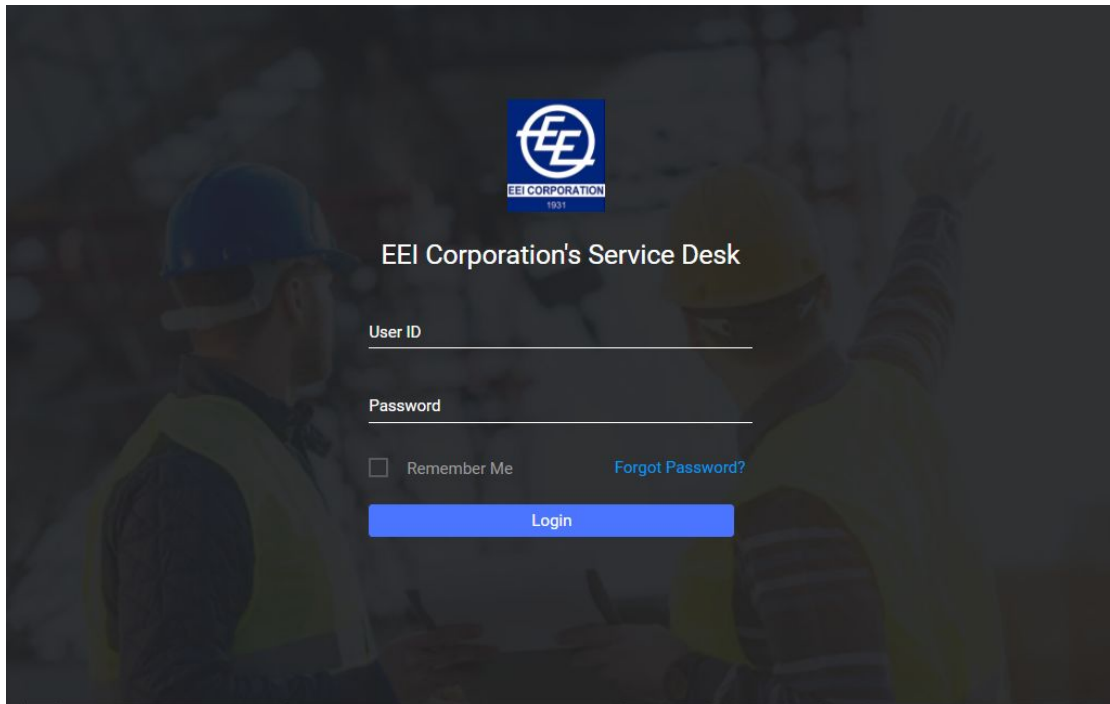
G. Glossary of Terms

Ticket	An electronic documentation of a concern or an issue
Service Ticket	A ticket for technical 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
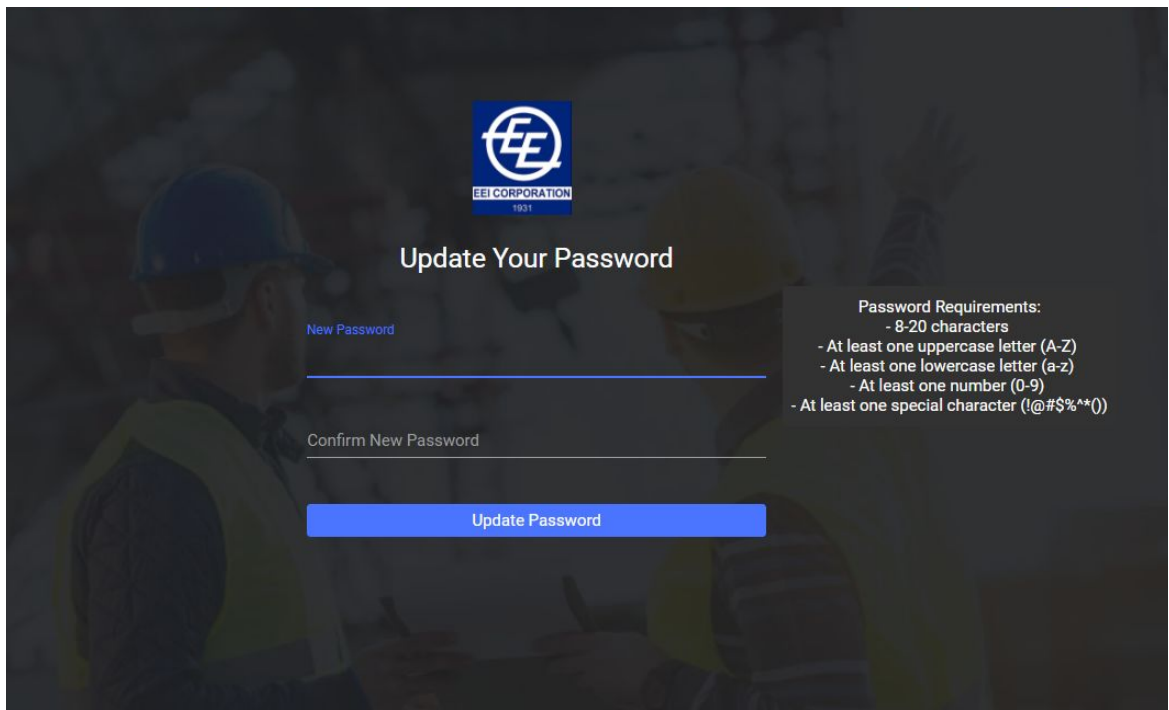
A. Log In

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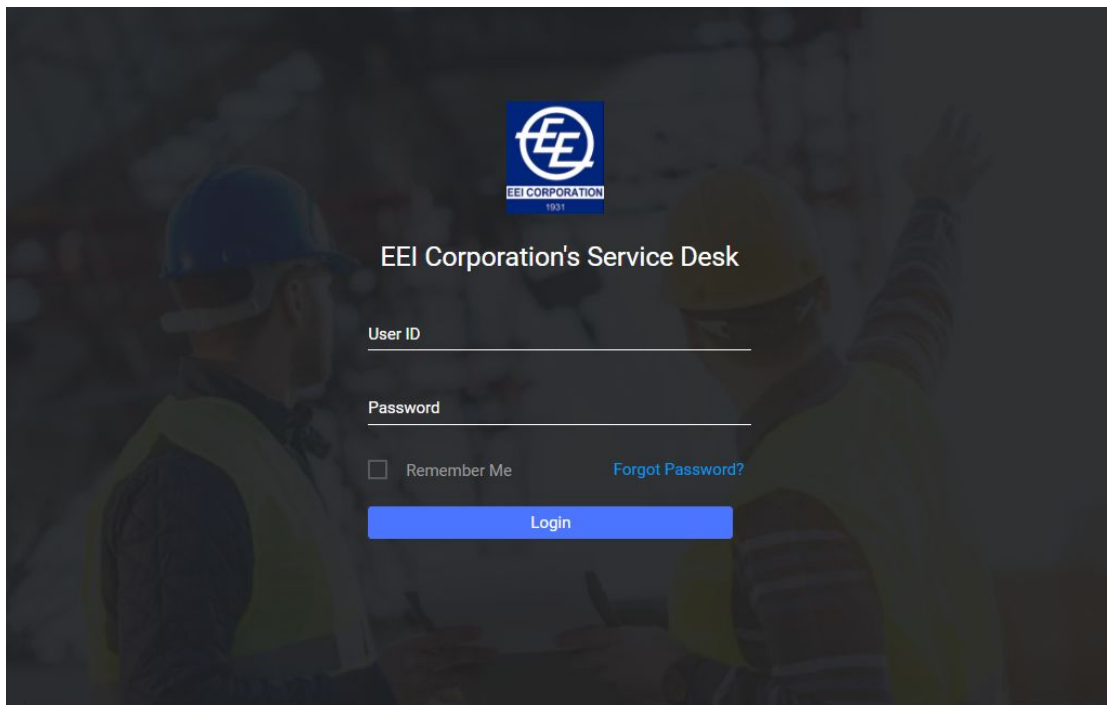
1. On your first login, you will be **required** to **change** your password
2. Password requirements are as follows:
    a. 8-20 characters
    b. At least one uppercase letter (A-Z)
    c. At least one lowercase letter (a-z)
    d. At least one number (0-9)
    e. At least one special character [!@#$%^&*(]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

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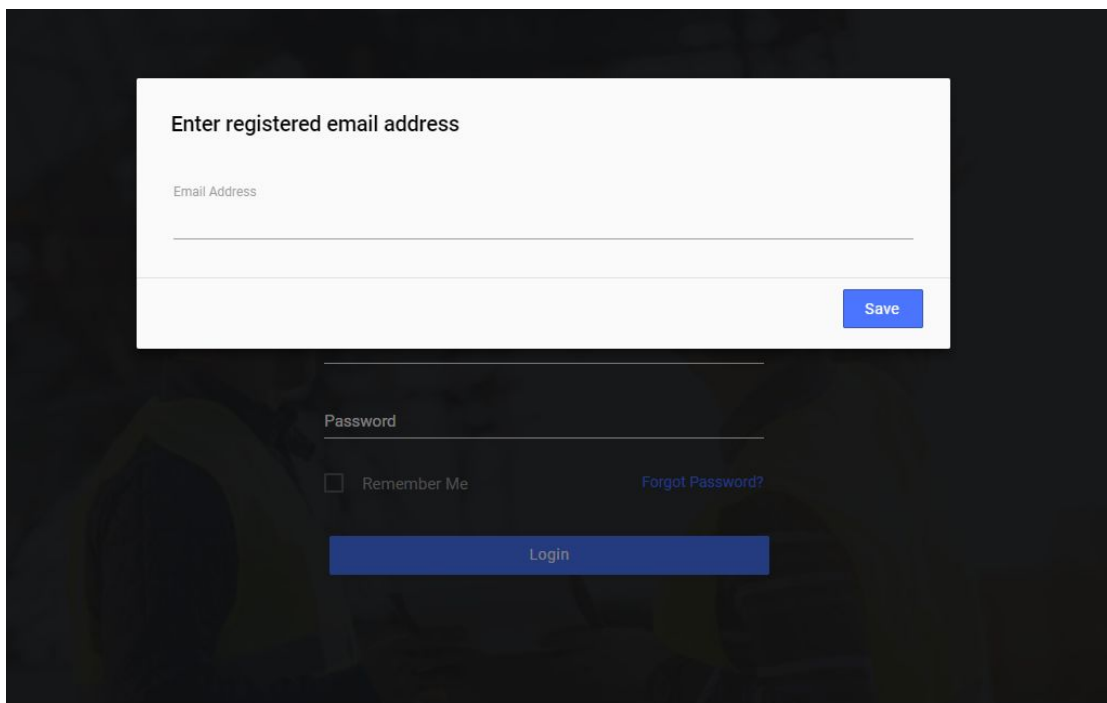
1. On the login page, click **"Forgot Password"** link above the login button

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.
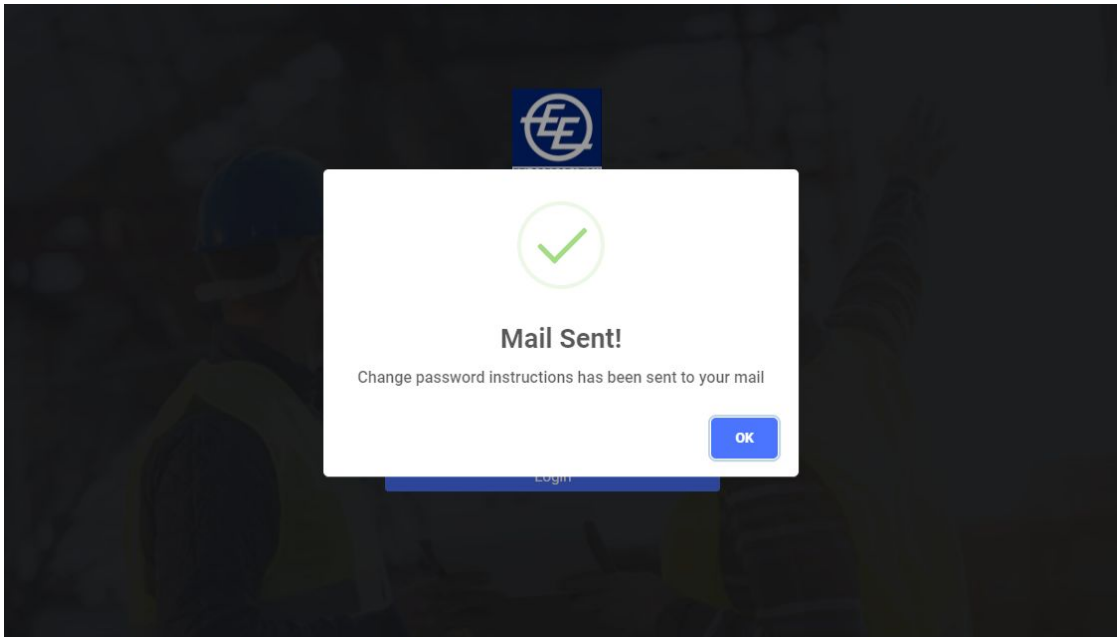
D. My Profile

1. Click your name on the upper right hand corner of the screen
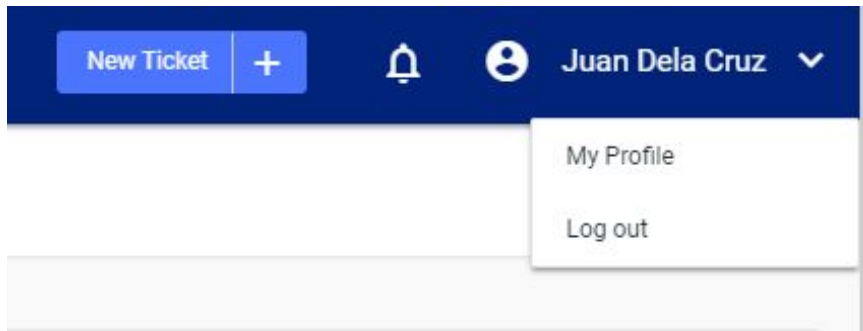
2. Click **"My Profile"** to view your account and basic information
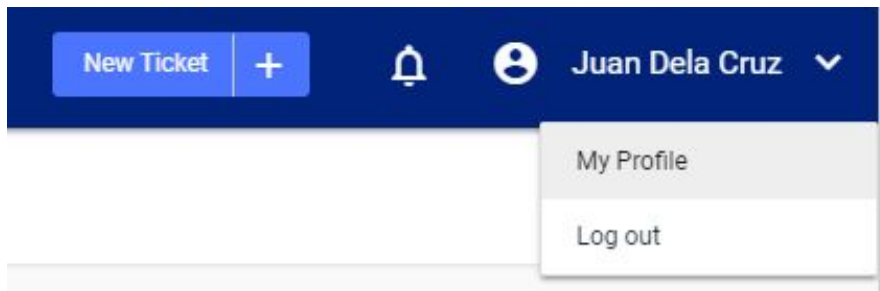
3. You will be redirected to **"My Profile"** page
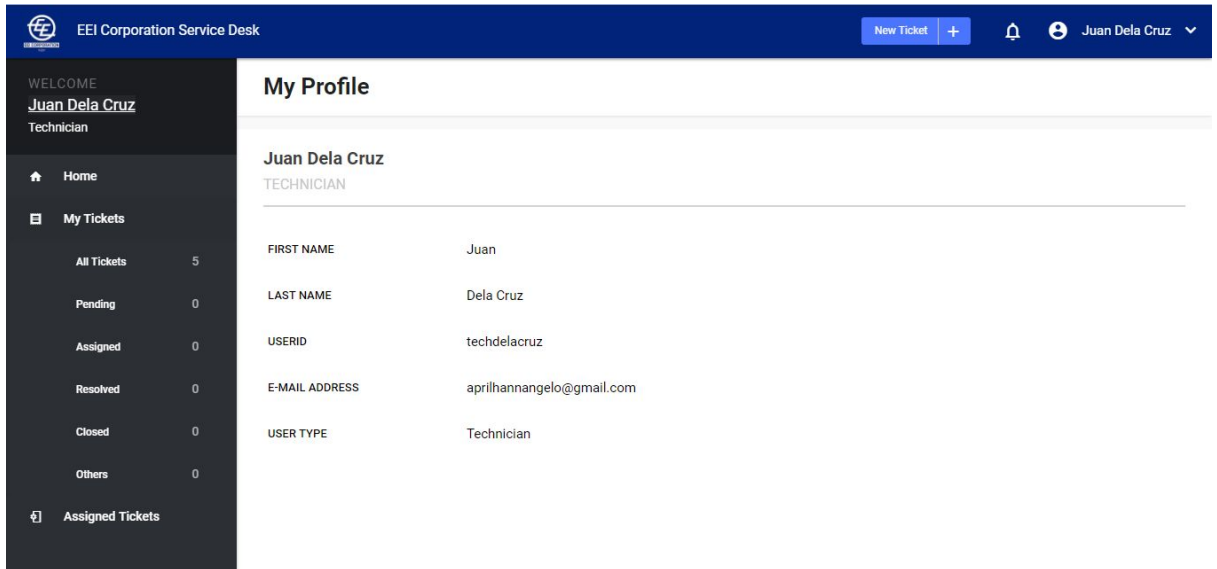
E. Notifications

1. To view all notifications, click on the **notification bell** icon.

   a. Clicking the notification will redirect you to the ticket details page
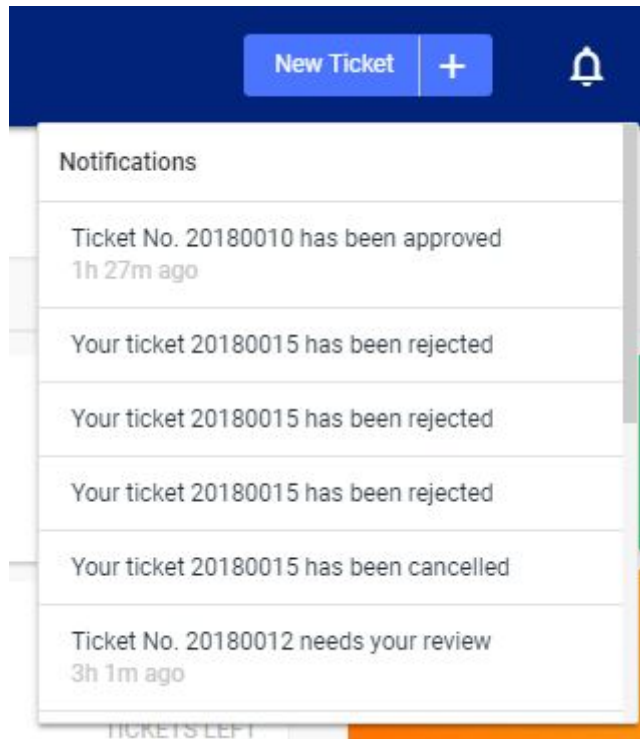
2. To view the complete list of all your notifications, click **"View all Notifications"**
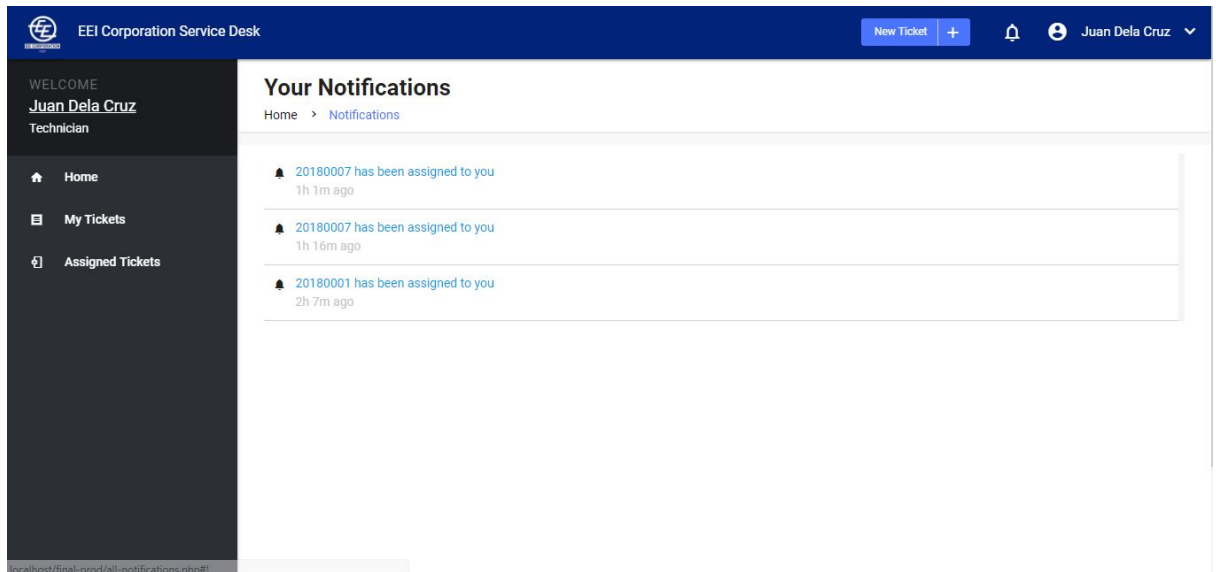
F. Log Out

1. Click your name on the upper right hand corner of the screen
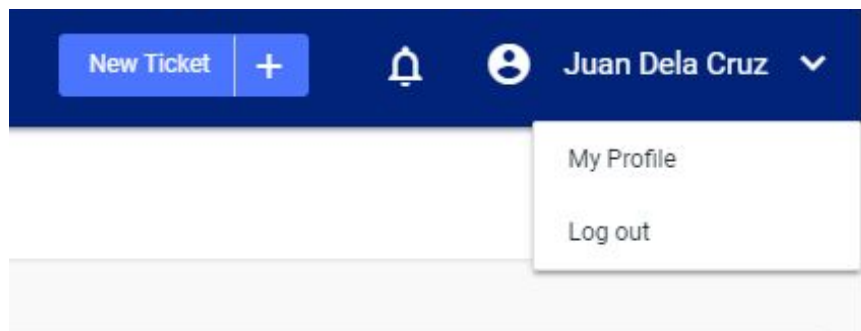
2. Click **"Logout"**
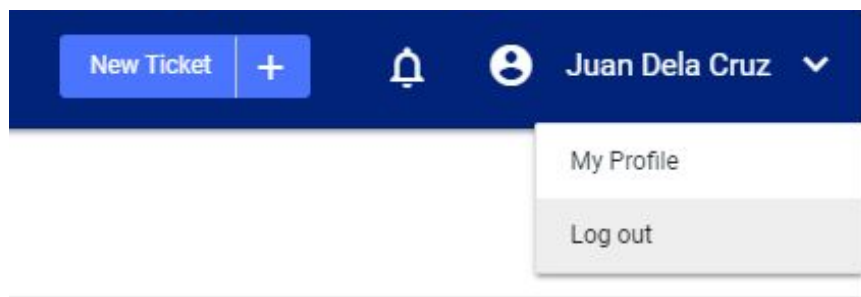
III. TECHNICIANS/NETWORK ENGINEERS

A. Navigation

- *Note: Technicians and Network Engineers have the same functionalities*
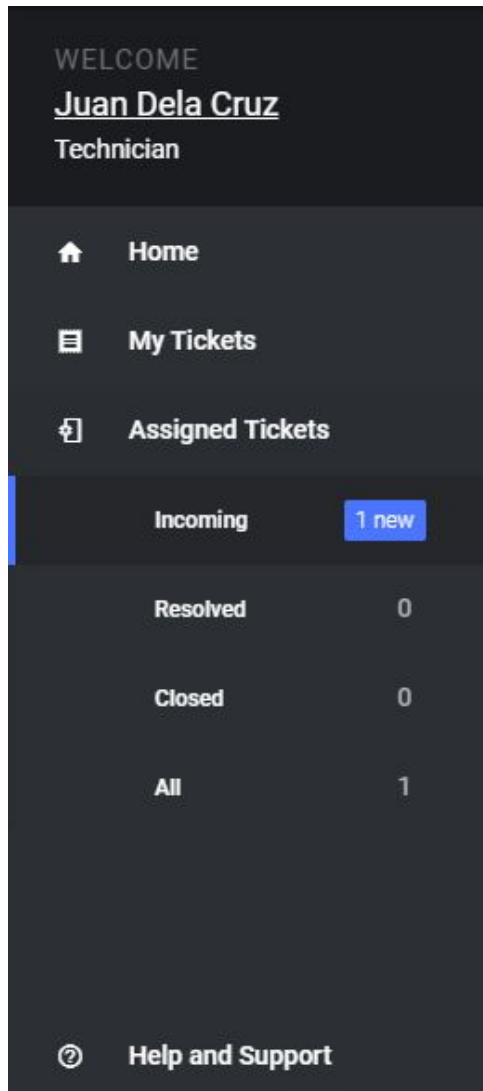
Home
- Page showing a list of all Frequently Asked Questions with solutions which can be performed by the general users

My Tickets
- Displays all tickets you submitted

Assigned Tickets
- Displays all tickets assigned to you for resolution

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
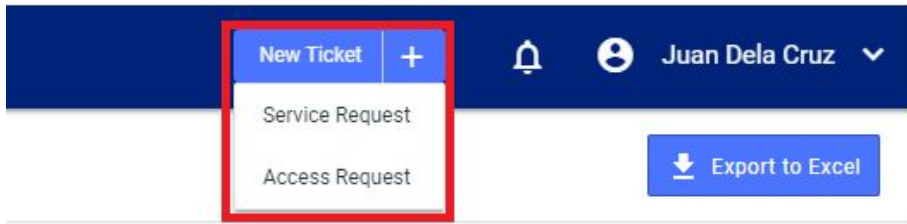
For Service Request:

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.
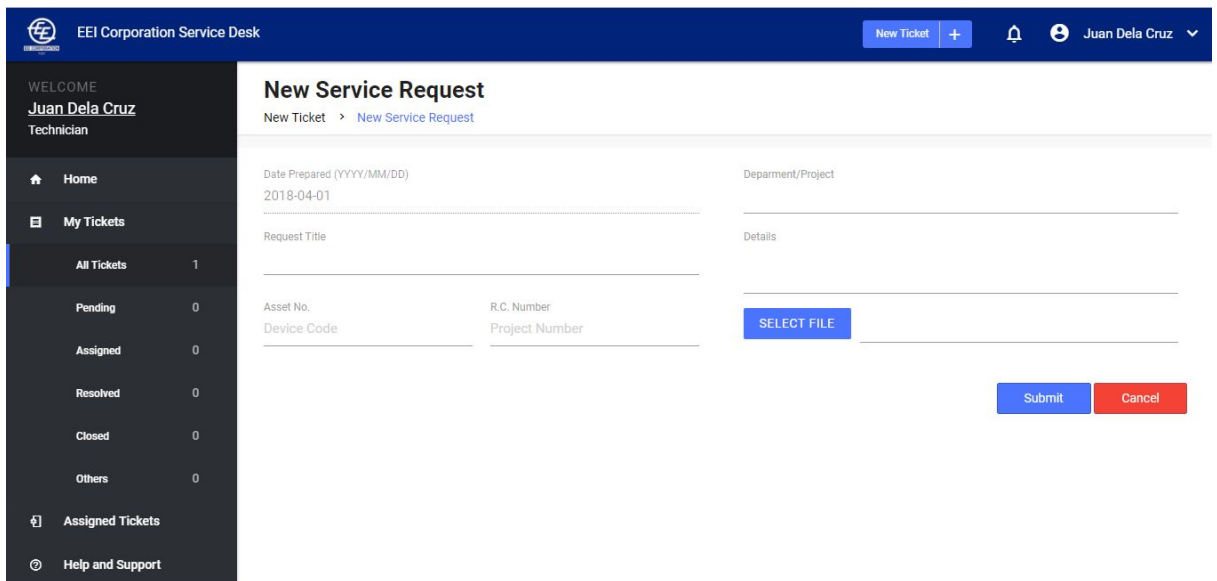
4. A confirmation box will pop out after you click the **"Submit"** button.
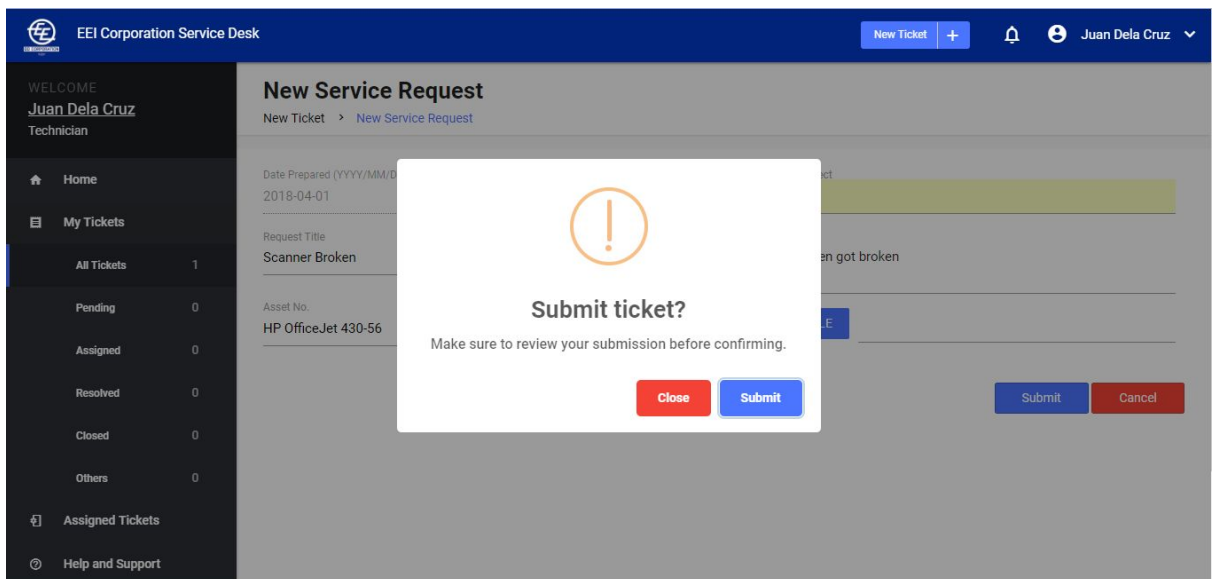
5. To finally confirm your submission, click the **"Submit"** button again. A ticket number will be assigned to your request
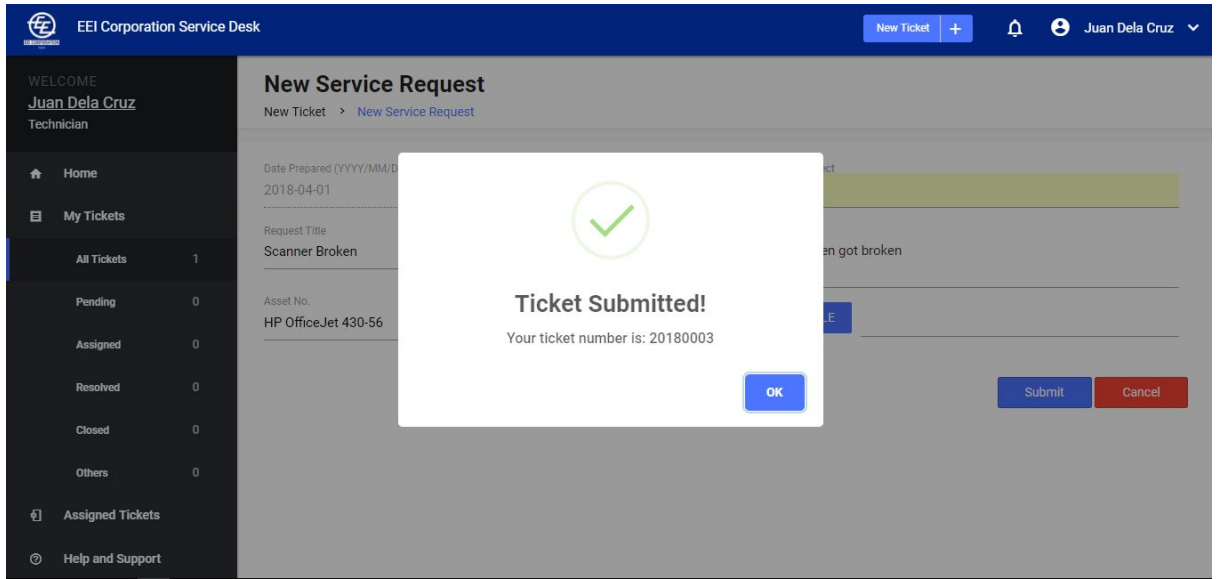
6. Your newly submitted ticket can be found on **"My Tickets"** page
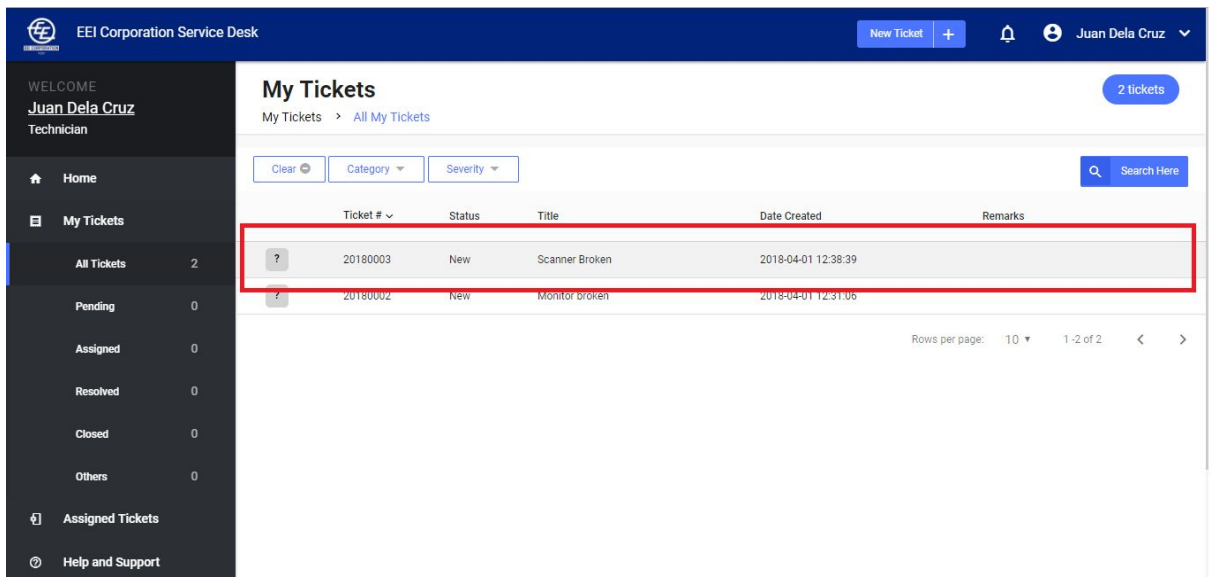
For User Access Request:

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*
       - *Checker is an optional field, approver is required*

    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.

3. A confirmation box will pop out. Click "**Submit**" again to finally confirm your submission.
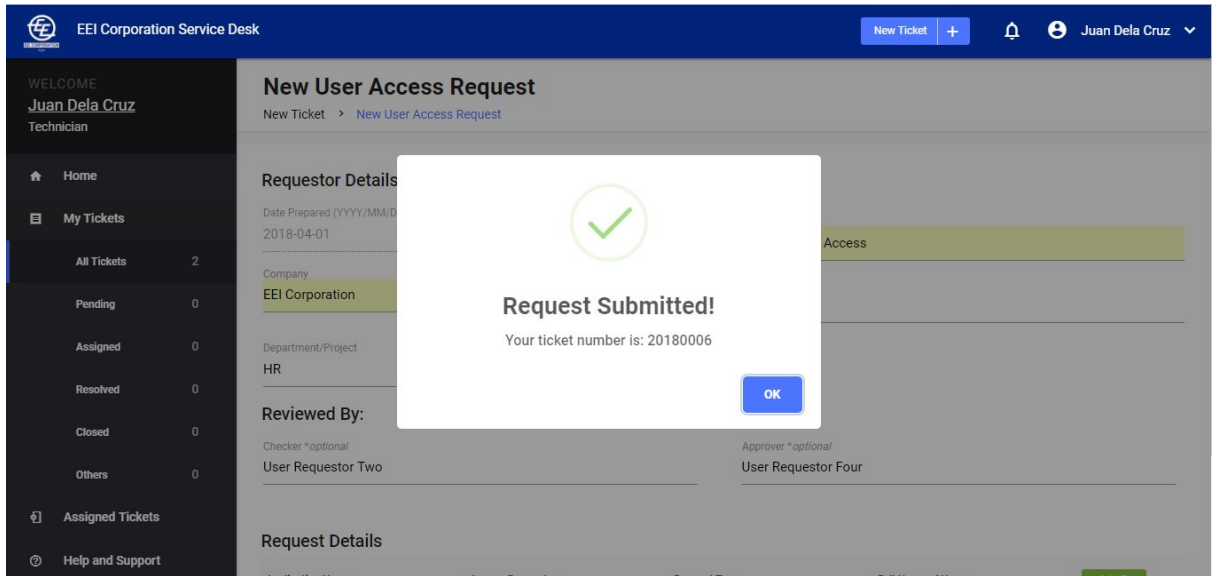
C. My Tickets

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*

    A. **By Status** - refer to the side navigation for the links.

    B. **By Category** - **"Category"** dropdown button is visible on the page before the table

    C. **By Severity Level** - **"Severity"**.dropdown button is visible on the page before the table

    D. **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. Assigned Tickets

I.   Resolve Ticket

1. Click **"Incoming"** under "**Assigned Tickets".**

2. Click the table row of the ticket to be edited view its **details page**

3. On the upper right hand corner of the ticket properties panel, click the **blue pencil button** to edit the ticket properties

4. A modal will open for the **Edit Ticket Properties** form.
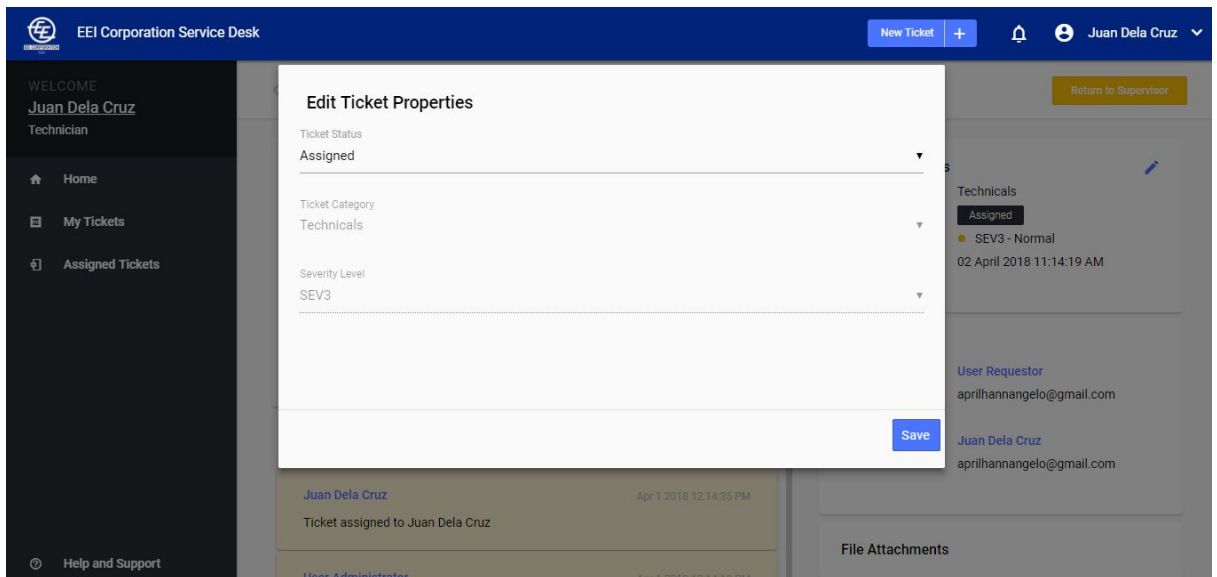
5. Change the selected value of the ticket status dropdown to **"Resolved".**

6. An input field will appear which will require you to log the action you performed to resolve the ticket.
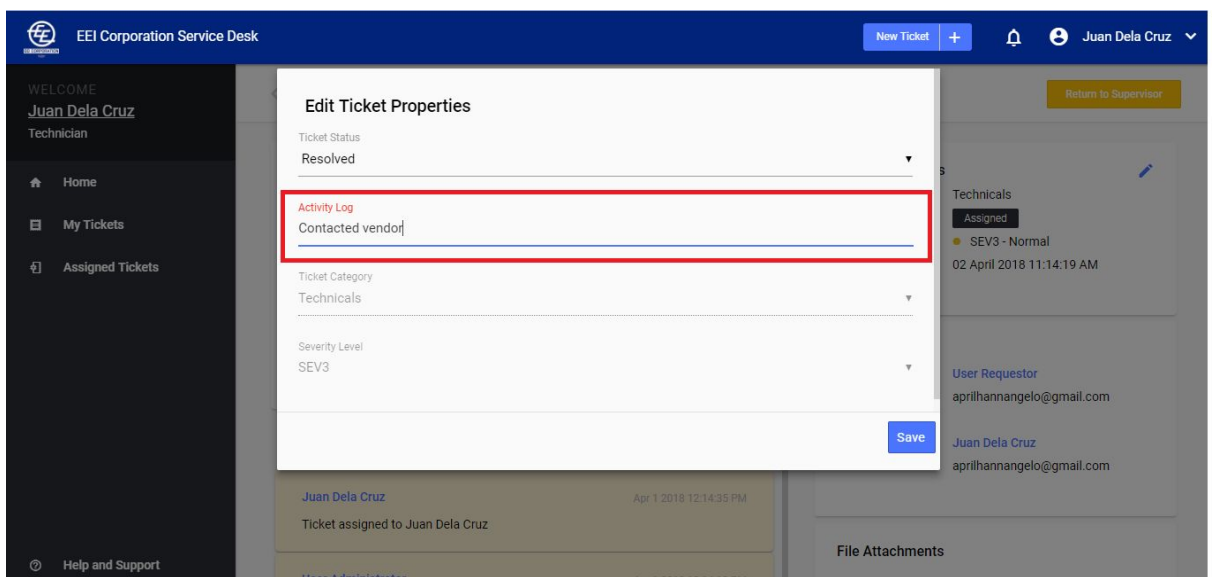
7. Click "**Save**"
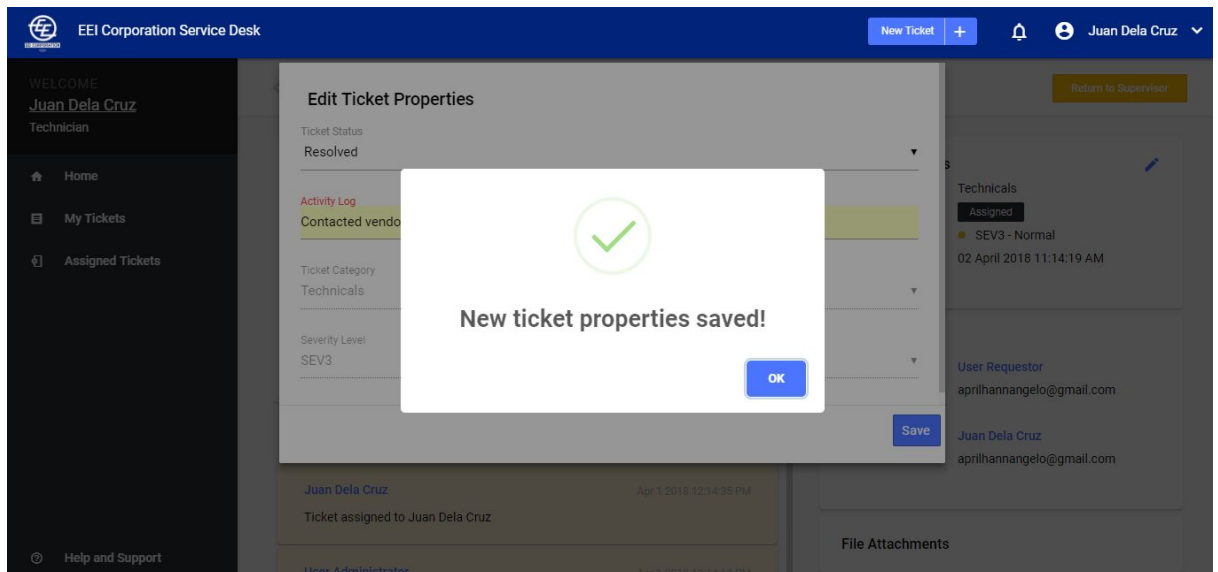
II. Add Activity Log

1. Under **"Activity logs",** click the text field that says **"Log activity log here"**

2. Input your activity log
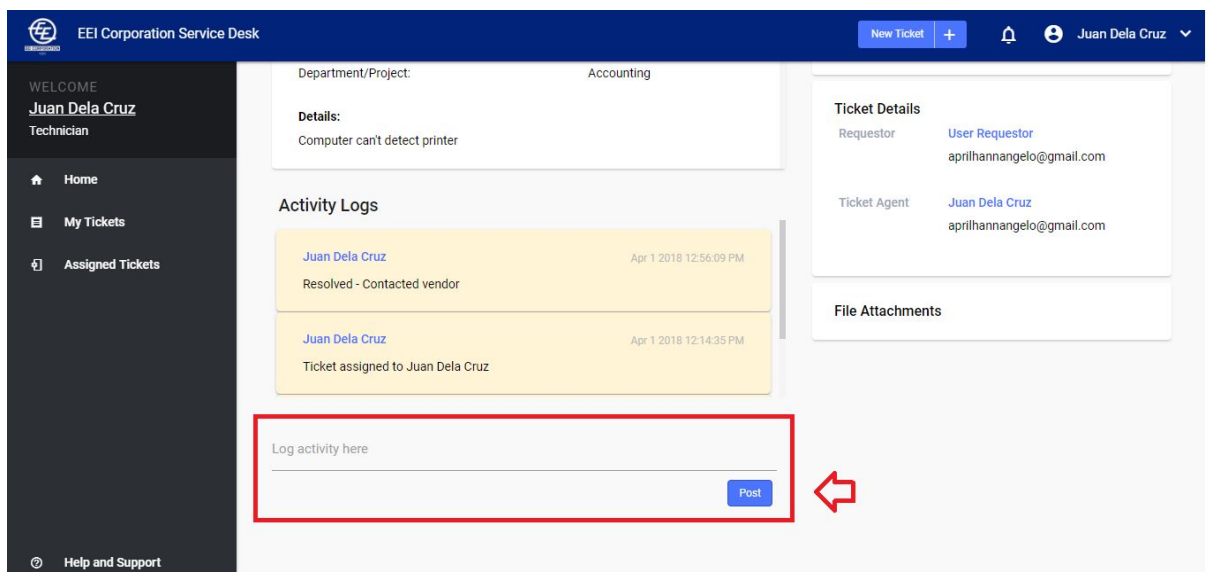
3. Click "Post" or press enter to submit activity log
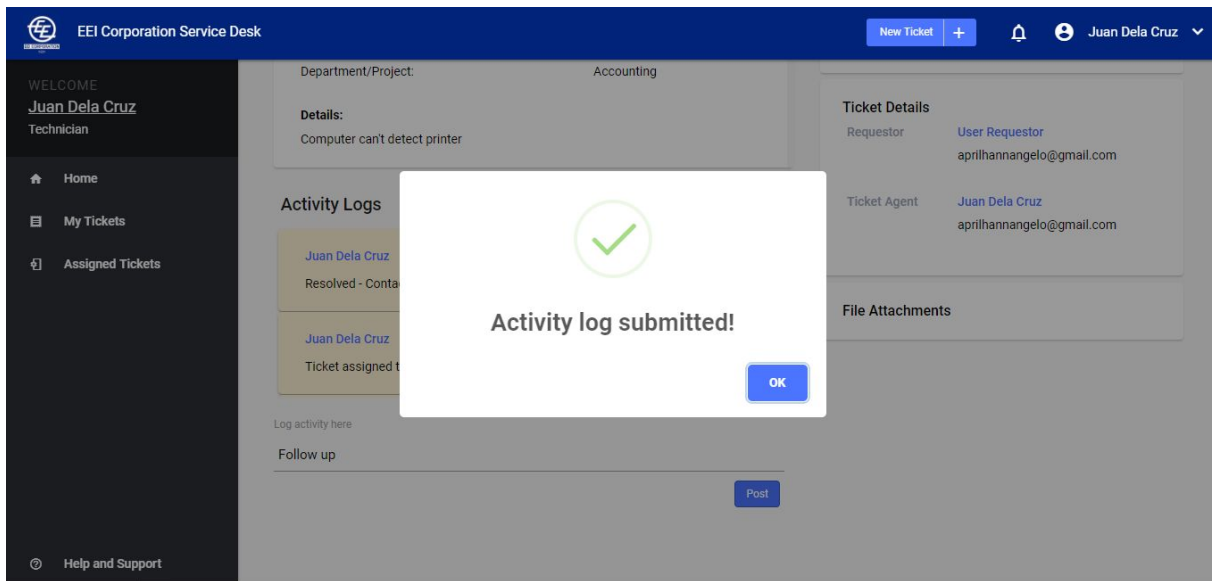
4. Your activity log is submitted and now will appear on top of the previous activity logs
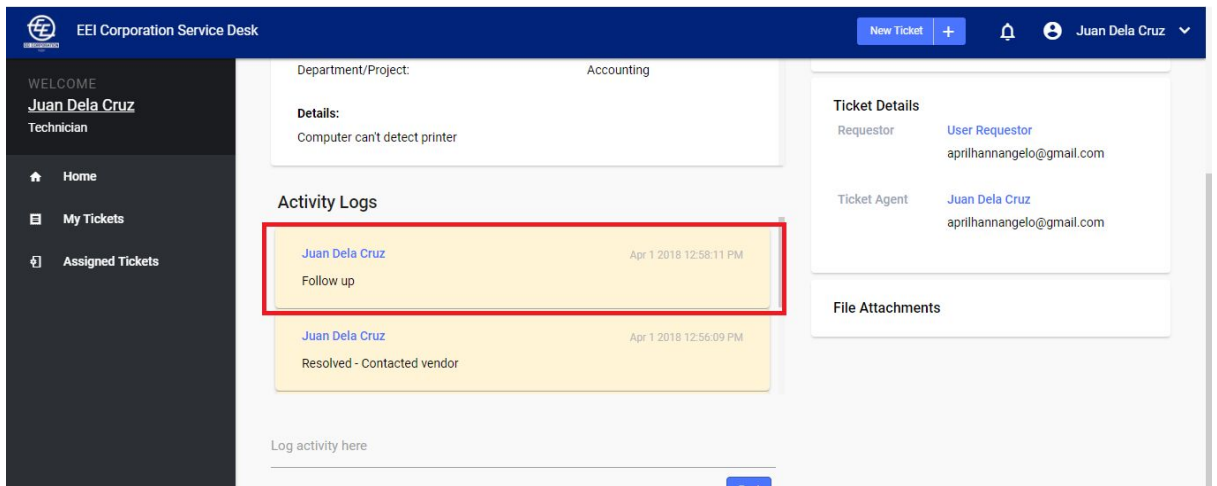
III. Return to IT Group Manager

1. Click "**Incoming**" under **"Assigned Tickets"**

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

3. On the upper right hand corner of the **details** page of the ticket, click **"Return Ticket"**
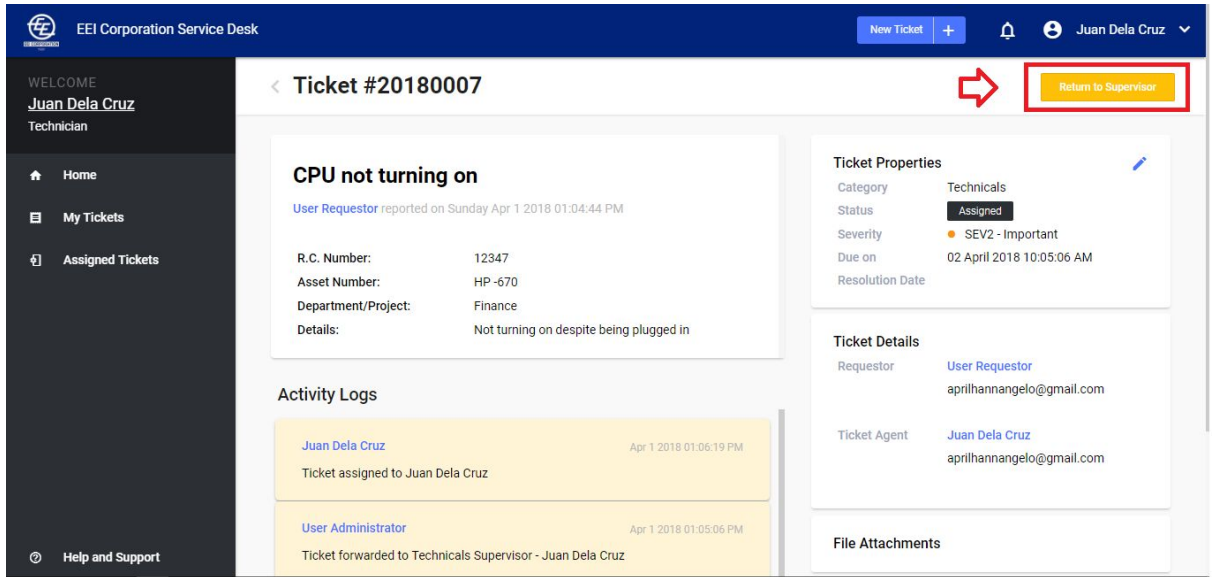
4. On the pop up, input reason for returning ticket to IT Group Manager

   Note: Only tickets with valid reasons will be returned back to the IT Group manager
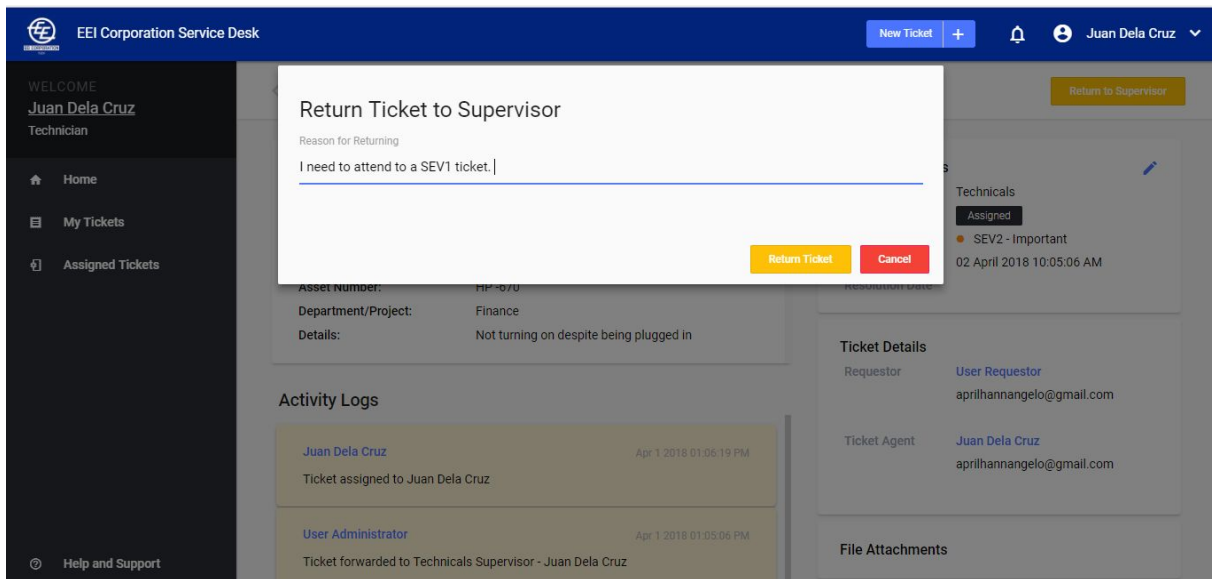
5. Click **"Return Ticket"**
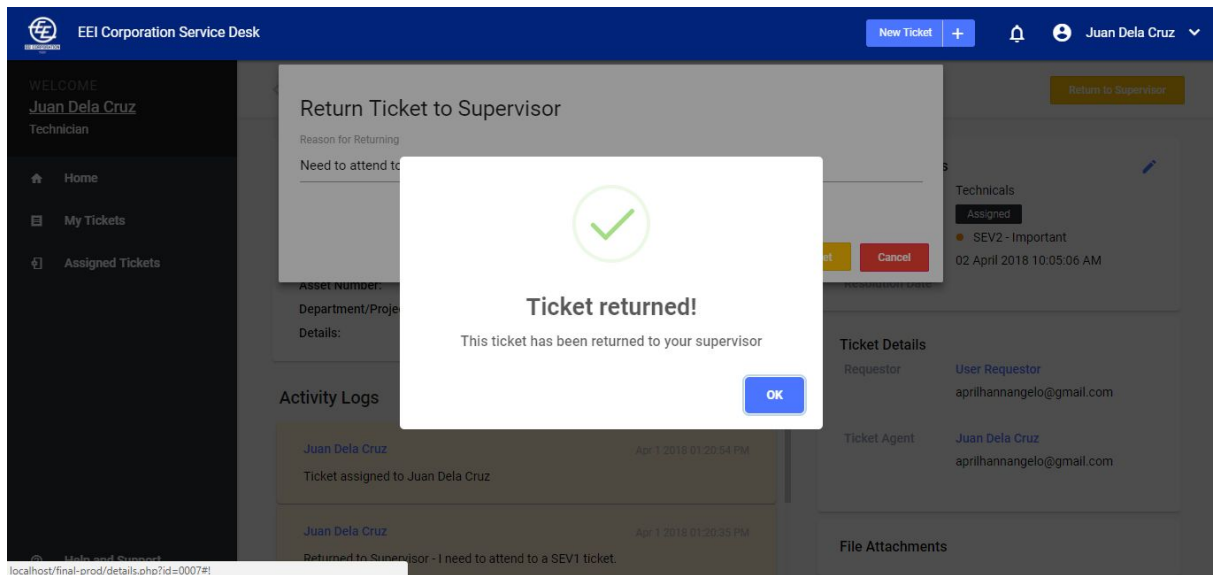
6. The ticket must not be in your Incoming Assigned Tickets
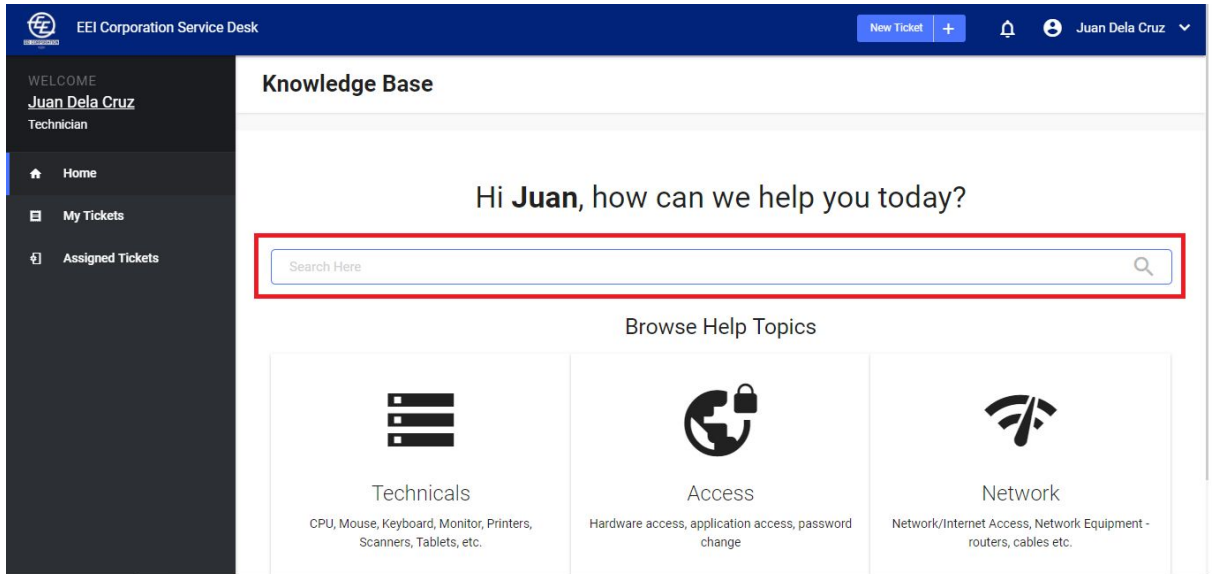
E. Knowledge Base

The Knowledge Base Section for the Technician and Network Engineer 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.
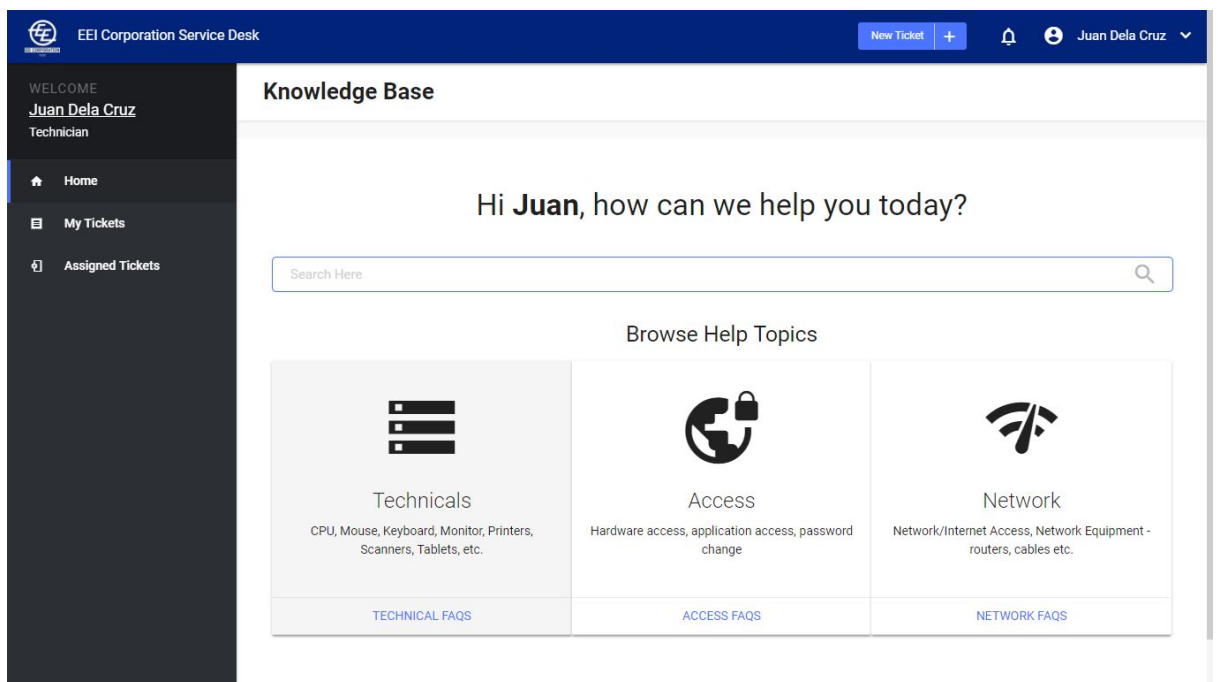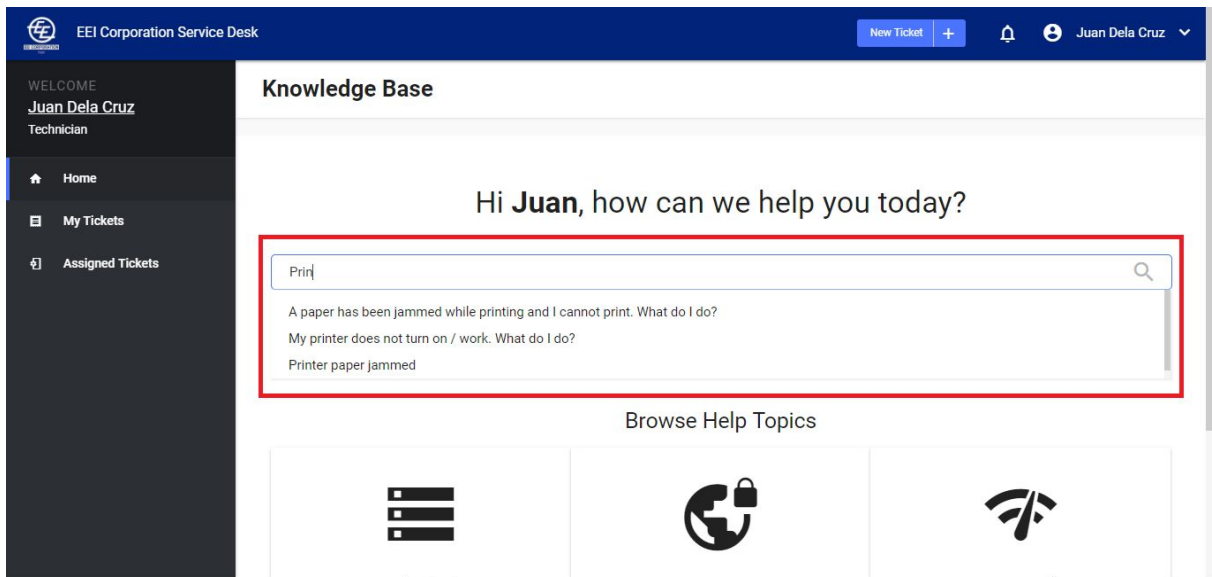
I. Search Article

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
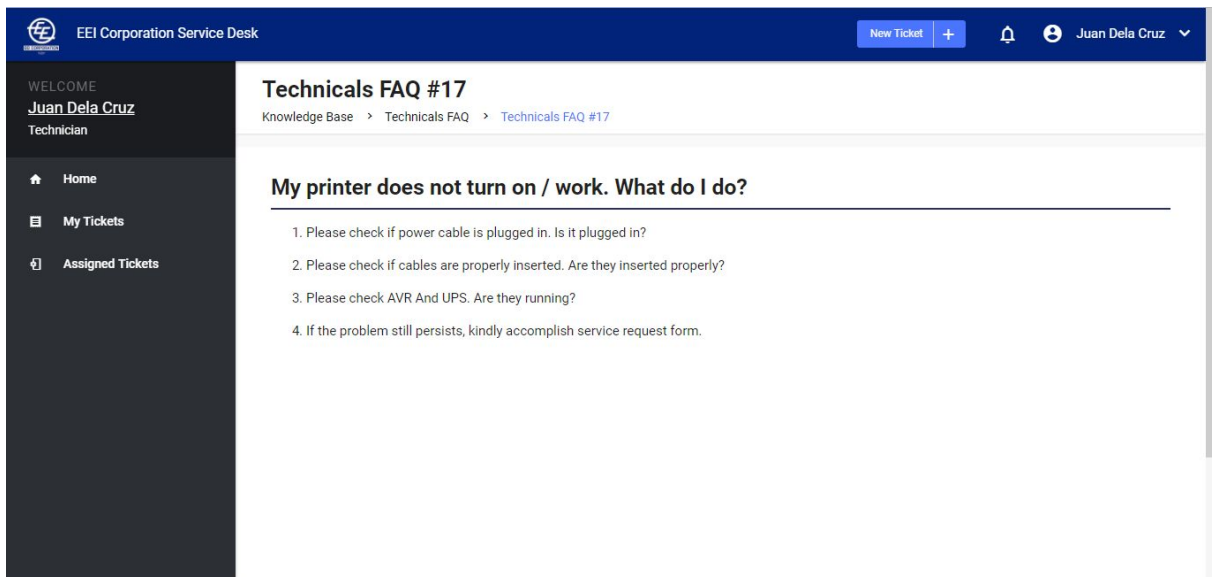
II. View Article List

1. In the knowledge base main page, **click the category** you wish to view the articles.
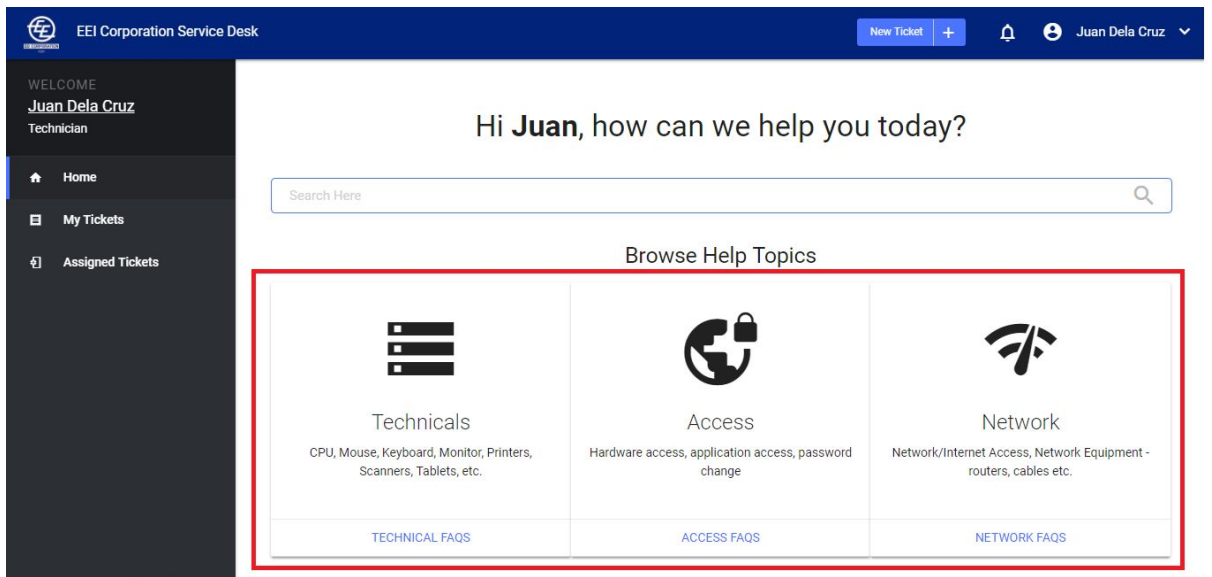
2. You will be redirected to the article list page of the category you selected

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