GENERAL

Description	Service Desk Analysts and other support personnel use ServiceCenter to document Incidents and Service Requests, assign work for follow-up, document ticket resolutions, etc.		
Purpose	This document supports the Incident Management Process and the following sections of the Statement of Work: • Appendix 1 to Schedule 3.3 (Cross Functional Services SOW) Section 3.1.4.1 Incident and Problem Management • Appendix 4 to Schedule 3.3 (Help Desk Services SOW) • Addendum 5 to Appendix 4 to Schedule 3.3 (Help Desk Services SOW), Statement of Technical Approach		
Applicable to	This document applies to all Service Desk Analysts.		
Supersedes	None		
Document Owner	Associate Director, Service Desk	**Owner Org**	Service Desk
Effective Dates	March 1, 2008	**Revision Date**	August 18, 2008

VERSION HISTORY

Version	Date	Author(s)	Change Summary
1.0	05-02-2008	Calvin Clark, Jackie Olbert	Initial draft adapted from training guide
1.1	08-18-2008	Calvin Clark	Added Suspend Appendix, Flow Chart

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Introduction and Overview

Introduction

The main function of ServiceCenter6.x® is incident management the use of ServiceCenter6.x "tickets". The solution is applicable to all existing ServiceCenter6.x users, including Northrop Grumman employees working under contract with VITA, and all VITA system users. The new design of ServiceCenter 6.x will help streamline the VITA incident management process through best practices use of ticket handling, as well as automating many current manual processes. Through automation, the advantage will be faster handling and overall process efficiency improvements. The new ServiceCenter 6.x system will produce reports from a single database that provides a more comprehensive view of support needs and accomplishments. The ServiceCenter 6.x database will contain incident and service request ticket data, details, and user information.

Overview

Utilizing Best Practice methods, ServiceCenter 6.x® is a comprehensive and fully integrated IT service management tool that enables VITA to improve service levels, balance resources and control cost. ServiceCenter 6.x® with embedded ITIL-based best practices quickly deploys consistent, integrated work processes across every part of the VITA organization.

Purpose

The purpose of this training manual is to train users on ServiceCenter® c.6.X functionality. Through the information in this training manual you will see how to navigate and perform incident management tasks through the new version. You will become aware of the new features, added functionality, and incorporated enhancements as they relate to ServiceCenter® V.6.x

Service Center V.6.1 has a Web client as well. Through the document we will show you the web screens if they are different from the client version.

Introduction and Overview

Document Conventions

Bold	Used for emphasis, commands, options, switches, and literal portions of syntax that must appear exactly as shown.
Italic	User for field names, file names, variables, and placeholders that represent the type of text required.
NOTE	Used for short informal messages providing clarification and helpful hints.
Caution	Used to ensure close attention, avoid risk or be careful of the task ahead.
Warning	Used as advice for the user to be careful or a sign of something bad.
	Used to alert the user of a potential problem or gives critical information.
	Used to designate the beginning of a set of step-by-step instructions.

Sources for Help

All questions, access requests, or problems associated with ServiceCenter® 6.x should be directed to the Service desk at 1-866-637-8482 or 804-786-3932.

Computer-based Training (CBT): **http://www.vita.virginia.gov/itTrain/vcccCbt/vcccCbt.cfm**

Production (**Live**) site: **https://sceast.it.northropgrumman.com/sc/index.do**

Web Client versus Windows Client

ServiceCenter has two client interfaces: a Windows client and a Web client that run in supported browsers. The two interfaces have similar functionality, and offer unique features to help users create their own ServiceCenter environments. Both clients offer tree view navigation that enables you to find information quickly, setup dashboards, and create shortcuts to frequently used forms and files.

Client Differences

The Web client offers the same basic features as the Windows client, including tree navigation. Each client also has unique features, as shown in the following table.

Feature	Windows Client?	Web Client?	Comment
Charts	Yes	Yes	You cannot change chart colors in the Web client. The Context (right-click) menu is not available. You can use favorite properties to edit chart properties if you make the chart a favorite.
Dynamic Data Exchange	Yes	No	Export data to Excel and access menu options. Web client: exports to .csv which can then be renamed to an

(DDE) support			.xls file.
Export lists to text files	Yes	Yes	The Windows client can also export lists to Excel files.
Multi-platform client support	No	Yes	Use a supported Web browser listed in the Peregrine ServiceCenter Compatibility Matrix on the Peregrine Customer Support Web site.
Options menu: Context	Yes	No	Right-click any form to view the Options menu.
Options menu: Pull-down	Yes	Yes	Windows client: Click the menu icon in the upper right corner. Web client: Click the menu icon in the upper right corner.
Spell checker	Yes	No	Embedded in applications. Web client: use spell checker embedded in the browser.
URL navigation	No	Yes	

SYSTEM NAVIGATOR

Differences in the System Navigator for the Windows client and the Web client occur because the browser environment is different from the Windows client environment.

Feature	Windows client?	Web Client?	Comments
Create Favorites	Yes	Yes	Favorites are restricted to lists, detail, and menu screens. Windows client: From a record list, application, or form, drag the System Navigator icon to the Favorites folder, or to a subordinate folder. Web client: From a record list, click **Save as Inbox**.
Print records	Yes	Yes	Windows client: Click Print the Record on the Options list. Web client: Internet Explorer is the only browser that supports printing. Click Print on the toolbar.
Count records	Yes	Yes	Windows client: The total number of items appears on the list toolbar next to the Count icon. Web client: From the list Options menu, click Count.
Create Subordinate Nodes	Yes	Yes	You can customize the System Navigator by adding a folder. Windows client: Right-click the parent node to make a new folder. Web client: Click Manage Favorites. Expand the Favorites directory to locate the parent node. Click New Folder. Type the name of the new folder and click **OK**.
Delete Nodes	Yes	Yes	You can customize the System Navigator by removing nodes. Windows client: Right-click to delete nodes from the System Navigator. Web client: Click Manage Favorites. Expand the Favorites directory, select the node to delete,

			and click **Delete.**
Collapse All	Yes	No	You can collapse subordinate nodes when you select a parent node. Windows client: Right-click the parent node and click Collapse All to close all subordinate child nodes. Web client: You can click the browser Refresh (or Reload) button to collapse all open nodes.

MESSAGE VIEW

ServiceCenter notifies you when you have activity messages to review. For example, each time you add or change a record, open or close an incident, complete a ServiceCenter task or an error occurs, ServiceCenter generates a message.

ACTIVE NOTES

Active Notes are a ServiceCenter® feature that displays ServiceCenter® activity messages in the Messages views. For example, each time you add or change a record, open or close an incident, complete a ServiceCenter® task or an error occurs, the Active Notes icon alerts you that there is a new message. The default configuration does not make the Messages view available automatically. However, the Active Notes icon is flat when there is only one message and is stacked when there are multiple messages.

HOW TO VIEW MESSAGES

ServiceCenter® messages appear at the top of the Detail window with one of these message icons. To view all messages in a ServiceCenter® session, click the message icon to open Messages view. To copy a message, select the message and use any standard Windows copy operation, such as **Ctrl+C**, to copy it to the clipboard. Click **X** to close the Messages view.

Icon	Icon Name	Meaning
	Information	Information about the most recent action.
	Warning	A warning about the most recent action.
	Error	The most recent action caused an error to occur.

HOW DO I PRINT? (WEB CLIENT)

In addition to the standard method 6through the pull-down Options menu, you can click the print icon on the Editor toolbar to use standard Windows printing. Internet Explorer is the only browser that supports printing.

HELP SYSTEMS

Help systems assist users when they have difficulties performing a task. ServiceCenter® has two Help systems. The online Help system explains ServiceCenter concepts and how to use ServiceCenter features. When you want to learn more about a feature or how to complete a task, online Help explains what you need to know. The field Help system contains a help record for every field in a table. When you are filling a form with date, field Help can tell you what information to provide in any field.

Online Help

How do I view online Help (Web Client)?

Press **F1.**

Field Help enables you to learn more about an individual field in a form and the value to specify in the field.

How Do I View Field Help?

Insert the cursor in a field, checkbox, or cell and press **F1**.

ServiceCenter Menus

The ServiceCenter Services, Support, Utilities, and Toolkit menus appear in the workspace after you log on to Service Center. The main ServiceCenter menus provide access to all ServiceCenter applications. The number of menu selections depends on your capability word assignments as a ServiceCenter user.

Menu	Purpose
Services	Access the main ServiceCenter applications.
Support	Accesses the Contacts, Locations, Vendors, and Models files.
Utilities	Accesses available configuration tools

Toolbar Buttons

The ServiceCenter toolbar and Options menus use standard buttons to trigger actions.

Icon	Icon Name	Meaning
	Add	Add a new record to the database.
	Back	Return to the last form.
	Cancel	Reverse your last action.
	Clear	Erase the data that you type on a form.
	Clocks	Track elapsed time.
	Close	Change the status of the current incident.
	Count	Counts the number of records in a record list.
	Fill	Populate the current field with data.
	Find	Locate related data.
	Menu	Refresh the record list and option list.

	New	Create a new record.
	Next	Advance to the next record.
	OK	Update the current record and return to the previous form.
	Options menu	Access the options available for the current form.
	Previous	Return to the previous record.
	Print	Send the current form to the printer.
	Refresh	Update to display changes.
	Save	Update the current record and display the current form.
	Search	Generate a record list.
	Select Queue	Choose a different work queue from a drop-down list.
	Undo	Reverse the last action.

Inboxes and Favorites

Inboxes and Favorites enable you to define and save a query. These inboxes or favorites are queries that generate record lists.

When you display the contents of an inbox or favorite, the query associated with it automatically runs and produces the list of records that meet the query criteria. Favorites appear in the System Navigator under Favorites and Dashboards. Inboxes appear as queues within most ServiceCenter applications. Whether you access the record list from Favorites and Dashboards, or an inbox from an application, the list of records in each is identical.

Managing Client Favorites

The Web client has a Manage Favorites feature that you can access from the System Navigator toolbar. It is comparable to the drag-and-drop functionality of the Windows client. Use Manage Favorites to move, copy, or delete nodes in Favorites and Dashboards. When you click Manage Favorites, ServiceCenter displays a dialog where you can select an existing node and complete one of these actions:

- Move one or more selected nodes to a different folder.
- Copy one or more selected nodes to a different folder.
- Delete one or more selected nodes.

Note: From the Manage Favorites dialog, click any note to display the Favorite definition form where you can change favorite properties.

How Do I Add an Inbox or Favorite?

a. Create a record list in any application using search.

b. Click Add Favorite icon in the System Navigator panel.

c. Choose List to save a record list or inbox, or inbox, or choose Detail to save a single record.

d. Type a name for the new favorite.
e. Click OK.

Note: The new favorite appears at the bottom of the Favorites and Dashboards folder.

How Do I Delete an Inbox or Favorite?

1. Click Manage Favorites icon in the System Navigator pane.
2. Expand a favorite folder to display all favorite links in the folder.
3. Click the associated checkbox to edit an individual favorite.
4. Click Delete to remove the favorite.

Note: You can delete a favorite if you are the originator.

How Do I View an Inbox or Favorite?

1. Click **Favorites and Dashboards.**
2. If necessary, expand a favorite folder.
3. Select the favorite to view the record list, form, or application.

Property	Description
Name property	The name that appears in the System Navigator
Query property	The database query that the favorite references. You can edit this property only if you are an administrator.
Display list items count	When selected, displays the number of records in the list. Disable this option if large list counts cause performance issues. You can edit this property only if you are an administrator.

How Do I View a List of Records?

The record list Options Menu is available when you view a list of records. You can choose one of the following options:

Icon	List Option	Description
	Count	Count the number of records in the list.
	Print List	Send the list to the printer
	Refresh List	Update the list with saved changes.
	Modify Columns	Change the column headings and related information in the record list.

	Export to Excel	Export the current Call List to a Microsoft Excel™ spreadsheet. Excel automatically opens a spreadsheet with the list embedded. You can export information to any product that has DDE (Dynamic Data Exchange) support. This DDE function requires Excel 95 or a later version.
	Export to Text File	Export the Call list to a text file delimited with a specified character.
	Save List as Inbox	Create a new inbox.
	View All Related	Choose one of the following from the Details option list, Calls, incidents, Changes, Quotes, or Problems.
	Mass Approve	Approve multiple records at once.
	Breakdown	Create a three-dimensional chart.

These options depend on the current ServiceCenter application and your user profile. To access the record list Options Menu, click the **List Options Menu** icon.

Modifying Record List Columns

There is a default order to the columns that appear when you display a record list. Your administrator can determine the order, or you can create a personal view that orders columns according to your preference. Each view that you define has a unique name.

How Do I Change the Columns in a Record List?

Display any record list.

1. Click the pull-down Options list.
2. Click **Modify Columns**. Service Center displays a form that enables you to reorder the columns in the records list. Each column heading appears in a table row that you can edit.
3. Click the column name row to select a new heading from the drop-down list.
4. To add a column heading between two existing headings, insert the cursor in an existing row. Click Insert Line. A new row appears above the current row. This creates a new column in the records list
5. To add a heading for the new column, select a heading from the drop-down list.
6. To save the new column Click Proceed.
7. To delete an existing column, insert the cursor by the name of the column that you want to delete. Click the **Delete Line**.
8. To cancel you changes, click **Back**.
9. To return to the default column settings, click **Use Default**.
10. When finishing modifying the column order, click the appropriate button on the

toolbar Back Proceed Insert Line Delete Line. ServiceCenter saves the column changes as a logon preference. You can also create customized views with different column ordering and save them as selectable preferences to apply as needed.

How Do I Sort a Record List?

Click a column header to re-sort the list using that column's information. For example, to search the list by status, click the Status column header.

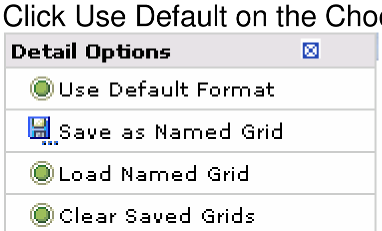
How Do I Create Customized Column Views for Record Lists?

To display any record list:

1. Click the pull-down Options list
2. Click Modify Columns . ServiceCenter displays a form that enables you to reorder the columns in the record list. Each column heading appears in a table row that you can edit.
3. Click the column name row to select a new heading from the drop-down list.
   3rd Party Name .
4. To add a column heading between two existing headings, insert the cursor in an existing row.
   Click Insert Line . A new row appears above the current row. This creates a new column in the record list.
5. To add a heading for the new column, select a heading from the drop-down list.
6. To delete an existing column, insert the cursor by the name of the column that your want to delete.
7. Click Delete Line .
8. Click the pull-down Options menu.
9. Click Save as Named Grid .
10. Type a name for you new grid, or column view.
11. Click OK .

You can repeat this process for each column view that you want to create. To return to the default column order, do one of the following:

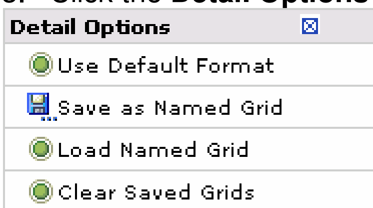
- Click the Details Options menu and select Use Default Format.
- Click Use Default on the Choose Columns form.



How Do I Delete All Saved Column Views?

Display any record list.

1. Click the pull-down **Options** menu .
2. Click **Modify Columns** .
3. Click the **Detail Options** menu and select **Clear Saved Grids**



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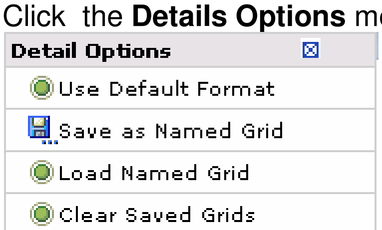
How Do I Invoke a Save Column View?

Display any record list.

1. Click on the pull-down **Options** menu .
2. Click **Modify Columns** .
3. Click the **Details Options** menu and **select Load Named Grid.**



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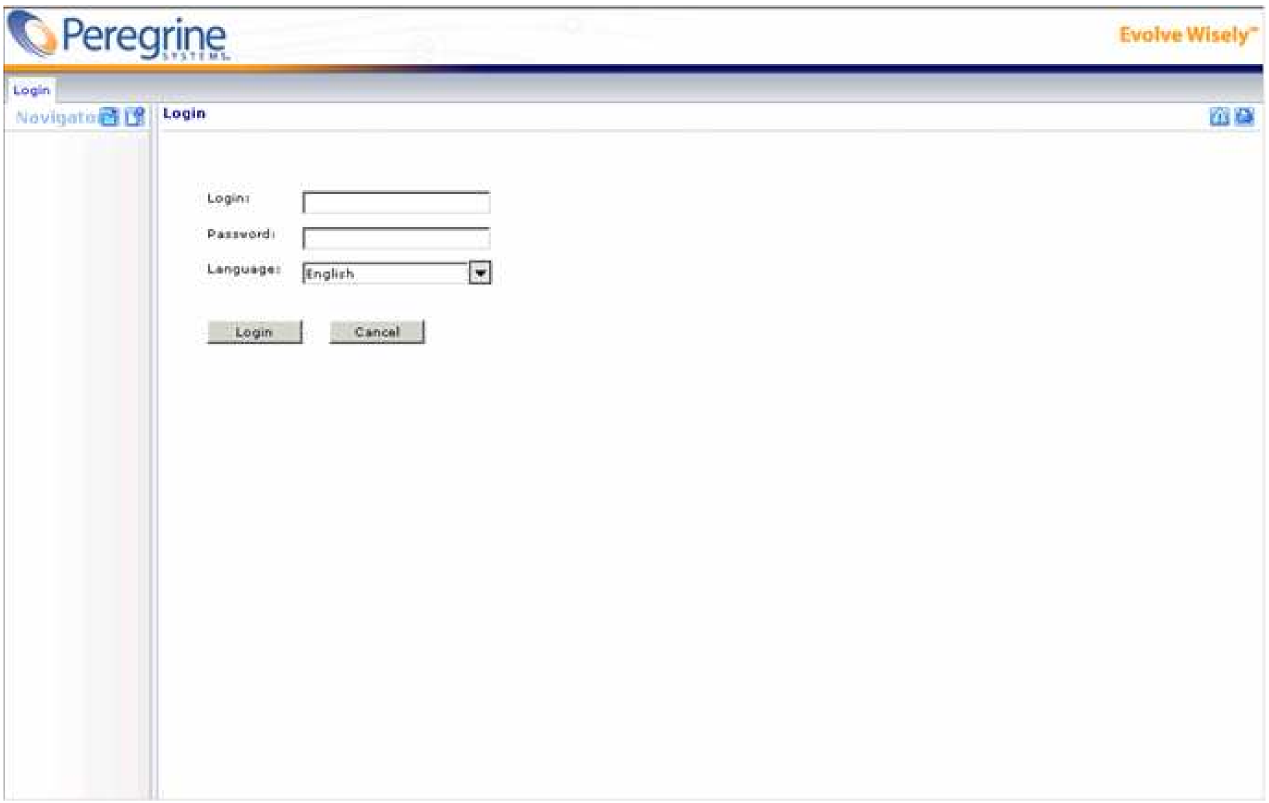
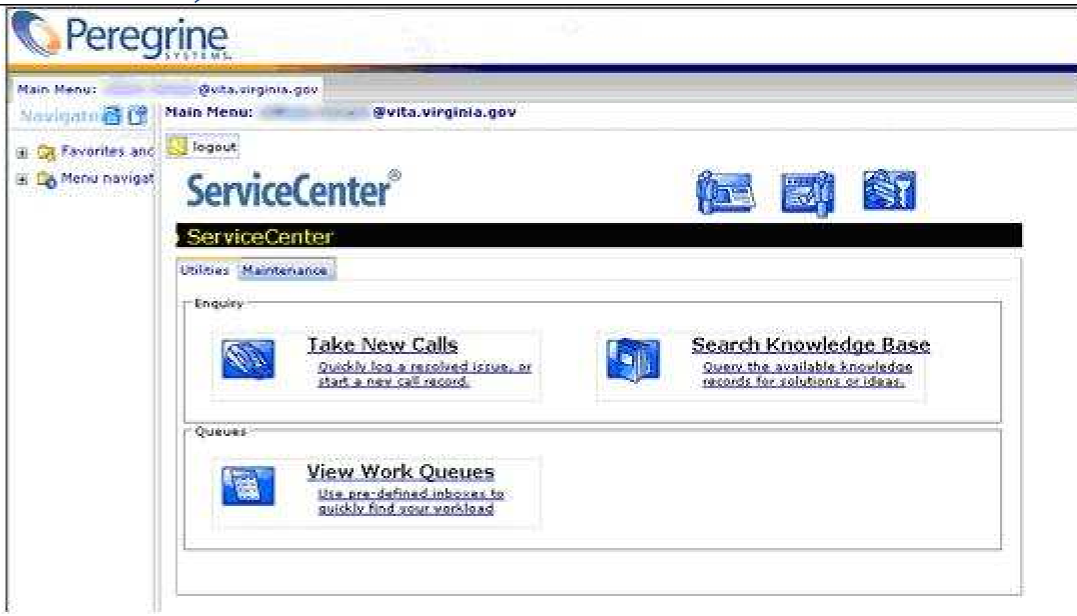
4. Click the drop-down list to choose the name of the saved column view (grid).
5. Click OK .

LESSON 1: LOGGING IN TO SERVICECENTER® 6.X (WEB CLIENT)

1. Launch the ServiceCenter production link: **https://sceast.it.northropgrumman.com/sc/index.do**
2. Type your **complete** user name (**email account** - john.doe@vita.virginia.gov) and secure password. **Note:** The current password configuration must be between 8-20 characters, alpha characters, non-alpha characters, 90 day life time, and it can not used the same password before 13 resets.
3. Click the **Login** button to authenticate.



4. After successful authentication, the screen below will appear. The Main Menu screen below indicates the operator profile was set to Service Desk Analyst.



Note: The screen also contains tools for system navigation located to the left of the logout button.

System Navigator – The System Navigator is navigation structure that can be expanded and collapsed to view ServiceCenter® menus, tables, fields, forms, and other integral components.

Editor – The editor utilizes menus and tabs for navigation similar to previous versions of ServiceCenter®.

Fast View – Fast views are stored on the shortcut bar (the list of icons on the far left of the screen). When you create a fast view, the view minimizes to the shortcut bar where you can access it when you click its shortcut bar icon. This is for Windows client only.

Perspective – Perspective is a new feature that allows a user to customize one or more views to provide all of the data and tools needed to complete a ServiceCenter® task. ServiceCenter® has a default perspective that is standard for accessing ServiceCenter® forms and data. This is for the Windows client only.

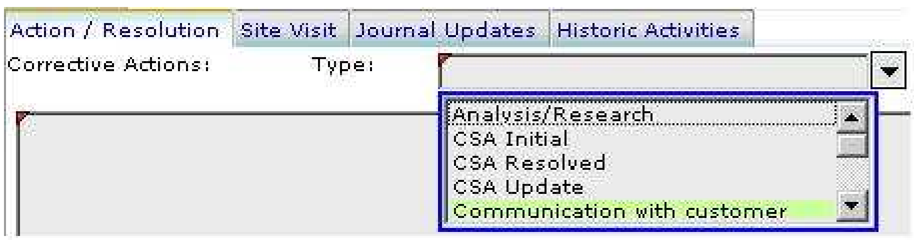
There are six major activities surrounding a Call or Incident ticket. Those activities are:

- Opening a Call or Incident ticket
- Searching/querying tickets
- Updating tickets
- Suspending Incident tickets
- Resolving Incident tickets
- Closing Incident tickets

Tips to remember:

1. Remember to look for the system generated message after each update has been saved.
2. Read each screen to ensure that you are in the correct location, **Incident Queue** vs. **Call Queue**.
3. Always **Resolve** the ticket before you **Close** the ticket.
4. **Resolve** initiates a Service Center notification, **Close** does not.
5. When performing a basic search, enter the ticket number, you may filter the search criteria by selecting a ticket status of **Open**, **Closed**, or **Either** if unknown.

6. To change the Incident status to **Suspend** or **Un-Suspend** click the **Details** icon.
7. For the Service Desk Analyst the Customer Service Alert (CSA) follows the same process as the normal ticket process. After the incident has been saved, you must click the **Notification** tab to input the CSA information.
8. When the term “ticket” is used in this document it may refer to a **Call** or **Incident** ticket.
9. For additional hands on training, launch the ServiceCenter VITA Training link at **https://12.41.67.29/sc/index.do**.
10. To send a ServiceCenter notification to the User/Customer select **Communication with Customer**.

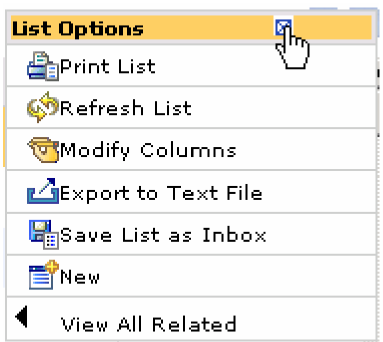


NOTE	To place the ServiceCenter® icon on your desktop for future use simply create a shortcut. To do this go to Start > Programs > ServiceCenter Client and right click on ServiceCenter Client. You will then be given various options. Click on **Create Shortcut**. You will then see a second ServiceCenter icon in the drop down. Simply drag this icon to your Windows desktop.

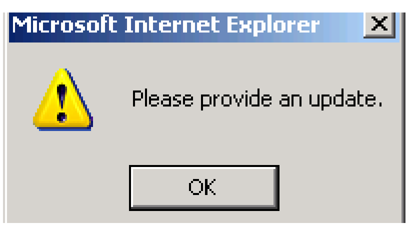
Images and Icons

To print, click the **Print** icon below. **List** prints a list of records and **Detail** prints an individual record.

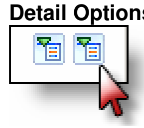
List Options

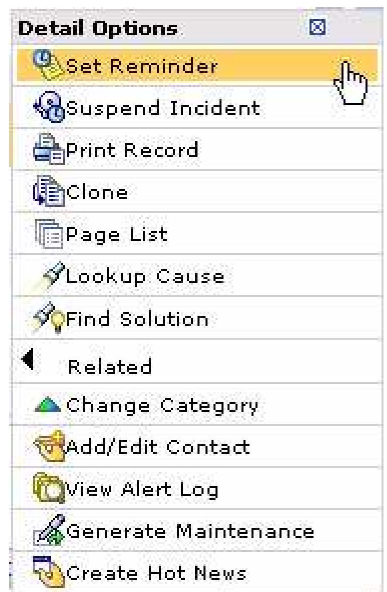


Reminder to provide Journal update



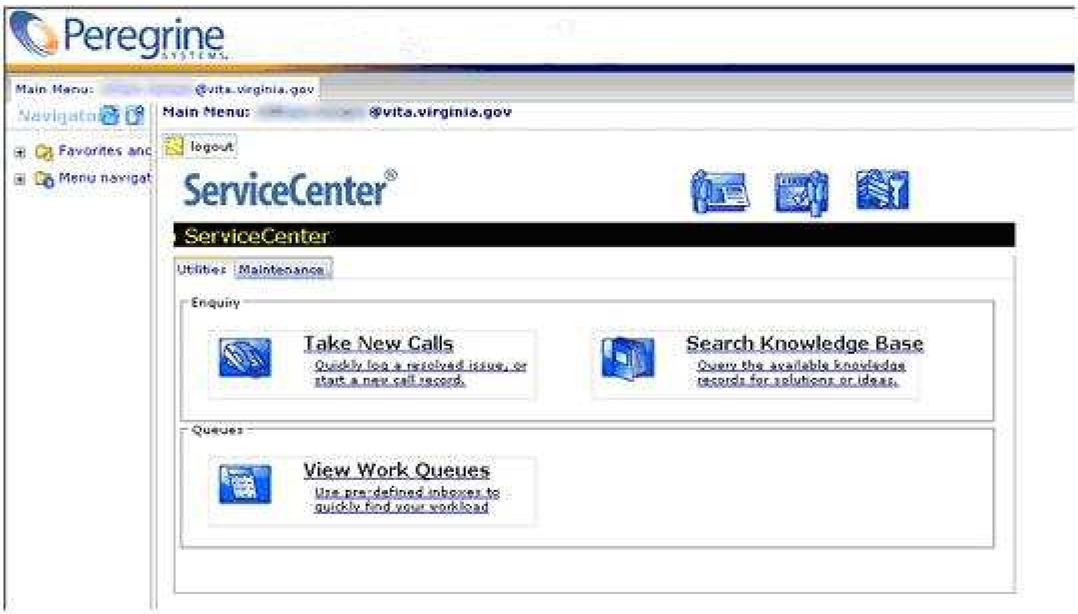
Detail Options





LESSON 2: OPENING A CALL TICKET

1. Click the Take New Calls icon located on the **ServiceCenter Editor**.



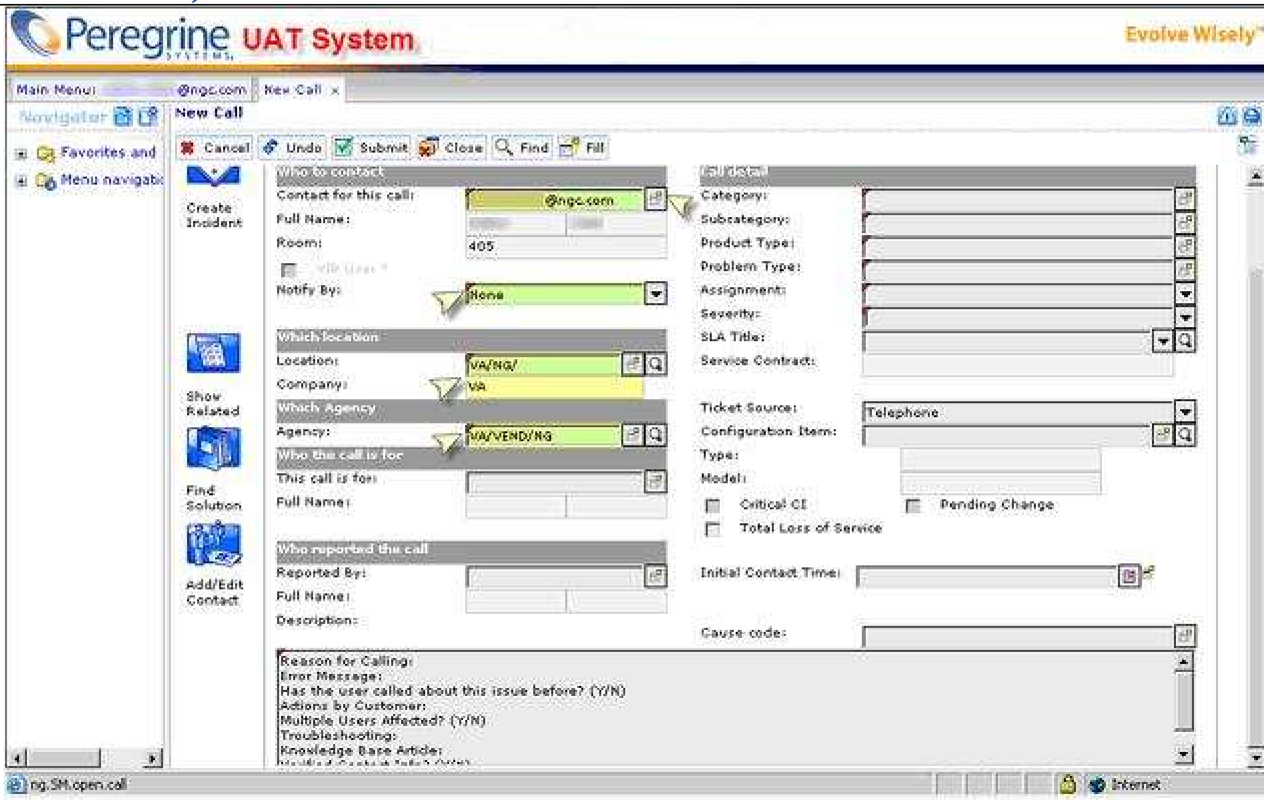
The screen shown on the next page will appear.

Note: The **red triangle** in the top left corner of any text box represents mandatory data. Use the **Fill Form** tab located at the right corner of each box.

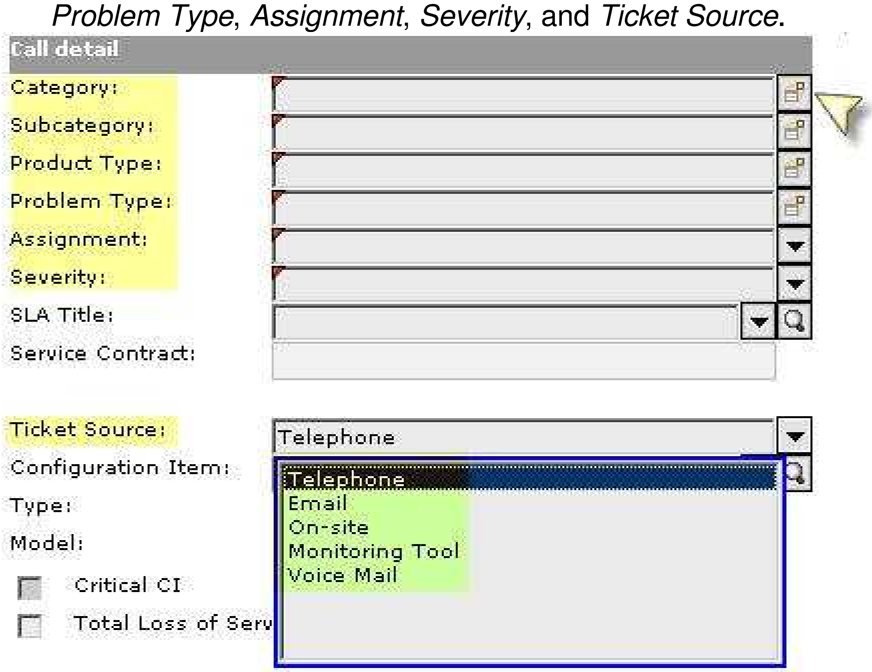
2. Fill out the appropriate information in the Call Detail tab. The *Contact, Location, Agency, Call Detail,* and *Description* fields are mandatory. To enter the required data, use the **Fill Form** tab located at the right corner of each text box.

3. The Contact Name is associated with the email account (**john.doe@vita.virginia.gov**). To filter your search begin by typing the first name (john), to filter even further (john d.); after entering the Contact for this call, click the Fill Form icon located to the tight of the text box. If there is more than one name listed, select the appropriate name from the list.

4. After the name is entered click the fill form (Notify By, Email, Location, and Agency) will be automatically filled in. See the highlighted areas.



5. Fill in the Call detail data by selecting the appropriate Category, *Subcategory*, *Product Type*, *Problem Type*, *Assignment*, *Severity*, and *Ticket Source*.



a. **Category:** Select the appropriate category from the list of options.

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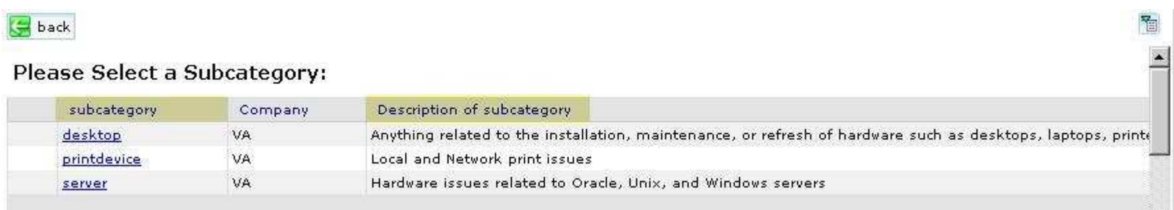
Please Select a Category:

	Category
	access
	facilities
	hardware
	inquiry
	mainframe
	messaging
	network
	operations cova
	security
	server apps cova
	software
	telecomms

b. **Subcategory:** Select the appropriate subcategory from the list options.



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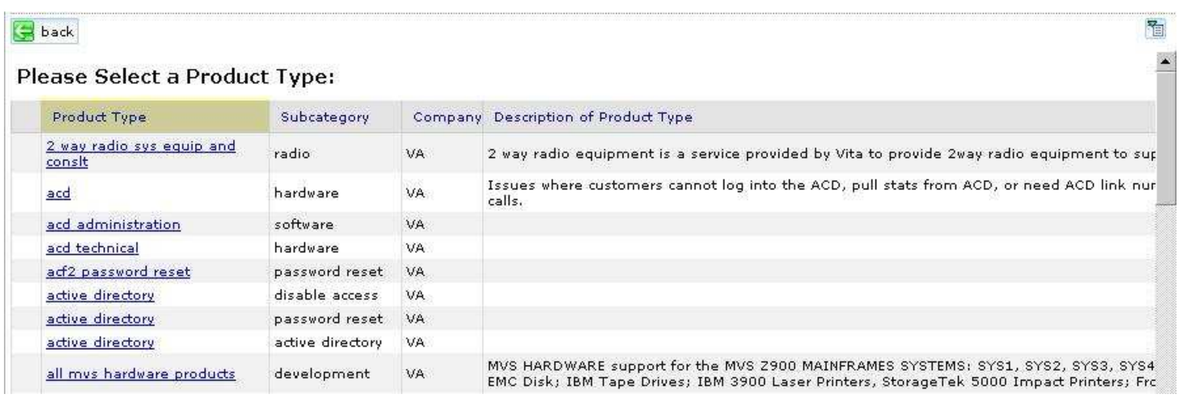
Please Select a Subcategory:

subcategory	Company	Description of subcategory
desktop	VA	Anything related to the installation, maintenance, or refresh of hardware such as desktops, laptops, printe
printdevice	VA	Local and Network print issues
server	VA	Hardware issues related to Oracle, Unix, and Windows servers

c. **Product Type:** Select the appropriate product type from the list of options. Use the arrow at the bottom of the page to view more options.



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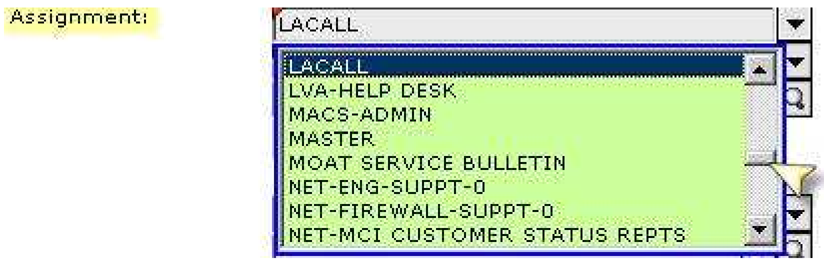
Please Select a Product Type:

Product Type	Subcategory	Company	Description of Product Type
2 way radio sys equip and conslt	radio	VA	2 way radio equipment is a service provided by Vita to provide 2way radio equipment to sup
acd	hardware	VA	Issues where customers cannot log into the ACD, pull stats from ACD, or need ACD link nur calls.
acd administration	software	VA	
acd technical	hardware	VA	
acf2 password reset	password reset	VA	
active directory	disable access	VA	
active directory	password reset	VA	
active directory	active directory	VA	
all mvs hardware products	development	VA	MVS HARDWARE support for the MVS Z900 MAINFRAMES SYSTEMS: SYS1, SYS2, SYS3, SYS4 EMC Disk; IBM Tape Drives; IBM 3900 Laser Printers, StorageTek 5000 Impact Printers; Frc

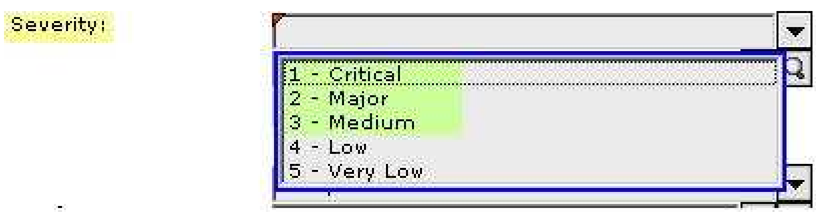
d. **Problem Type:** Select the appropriate product type from the list of options.

e. **Assignment:** The assignment will auto-route to the predetermined group based on the Category, Subcategory, Product, and Problem selected. If the appropriate assignment group is not selected, change it to the correct assignment group.



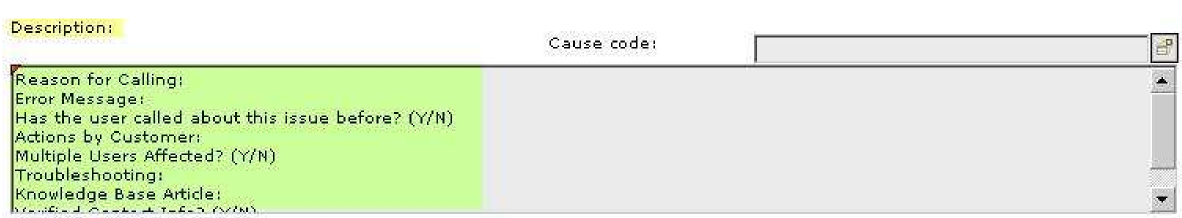
f. **Severity:**

Critical	1 - Highest priority available, should only be assigned for calamities.
Major	2 – Serious incident
Medium	3 – Typical problem
Low	4 – Minor (Service Request only)
Very Low	5 – Minor (Service Request only)



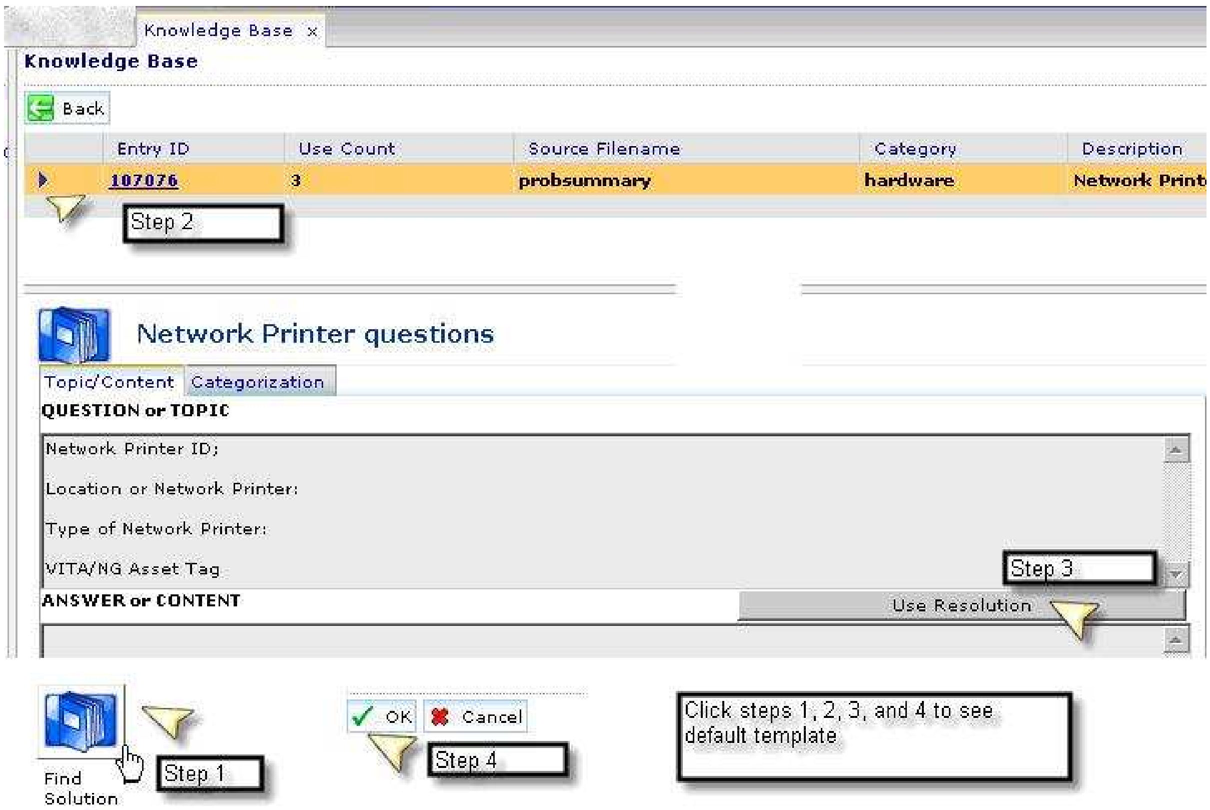
Note: The severity/priority levels are negotiated with the customer and are based on the impact and urgency of the request. The severity/priority level and corresponding response time specify how quickly you must respond to the customer if the request is not resolved on the first call. It also determines how often the customer should receive updates on his/her request.

g. **Description:** The Call description data is critical to the ticket for historical purposes. To ensure that specific Call details are captured, use the default template below.

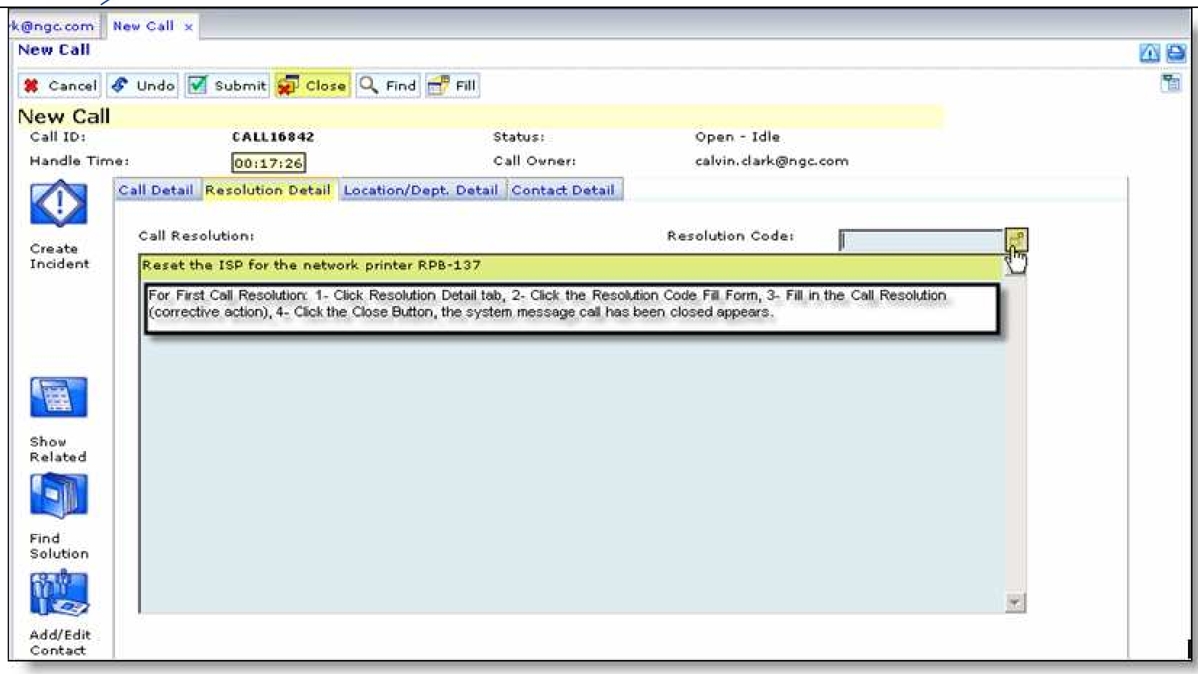


Note: The next step is optional; you may elect to type all the required data.

h. If the template is not visible, follow the quick steps below to select a template. The image below has been modified to show all the steps in one image.



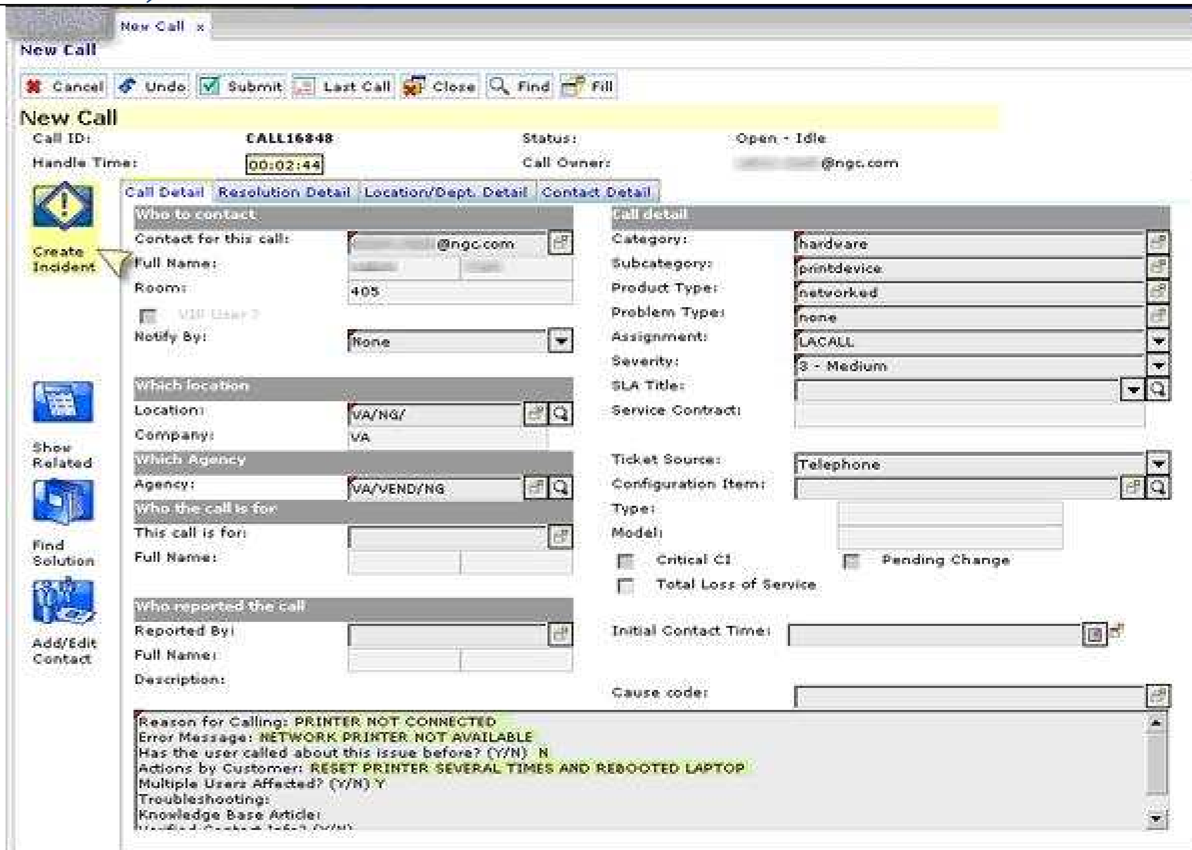
i. To complete a **First Call Resolution**, click the **Resolution Detail** tab, select the **Resolution Code** from the options listed, fill in the Call Resolution date, next click the **Close** button. This completes the **First Call Resolution** process.



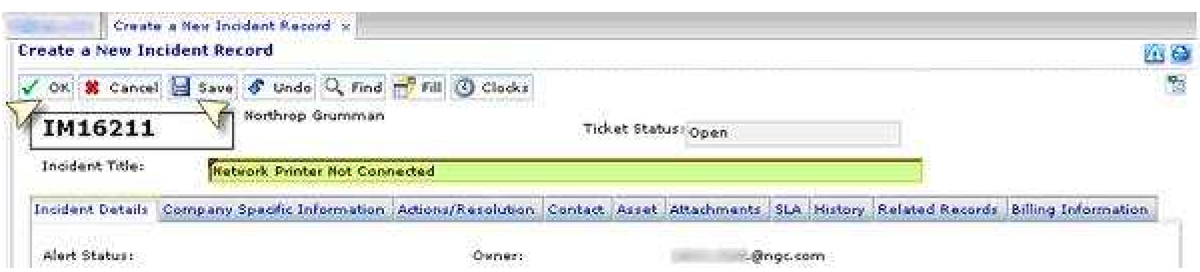
First Call Resolution Complete

6. To escalate the Call to an Incident, click the Create Incident icon.

Note: When creating a Call/Incident from email/voicemail, change the Ticket Source. If the call escalated to an Incident, include the time received for the email/voicemail in the **Initial Contact Time** field.



7. Click the **Save** or **OK** button to complete the New Incident process.



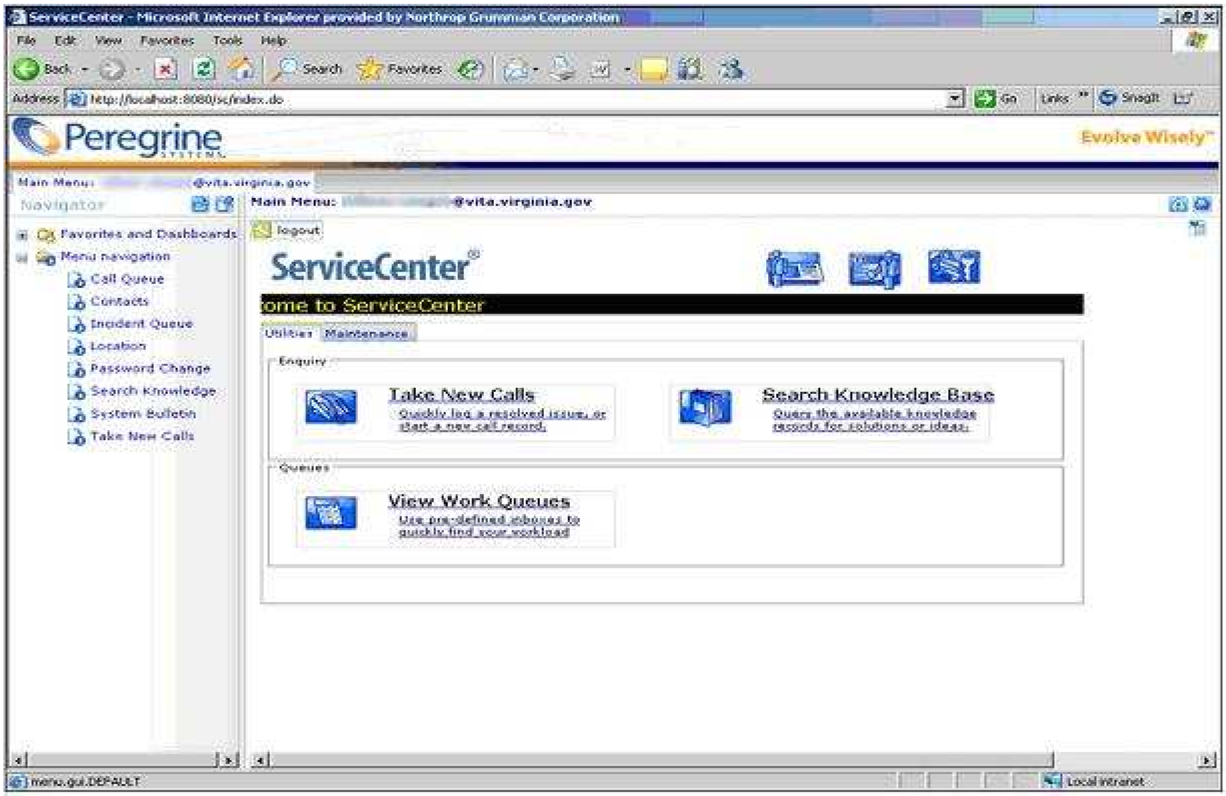
8. The call has been saved and associated with a new Incident.

Create New Incident Complete

NOTE	It is important to provide as much information as possible throughout the lifecycle of the ticket. Each update may be found by clicking the **Activities** tab then clicking the **Historic Activities** or **Journal Update** tabs.

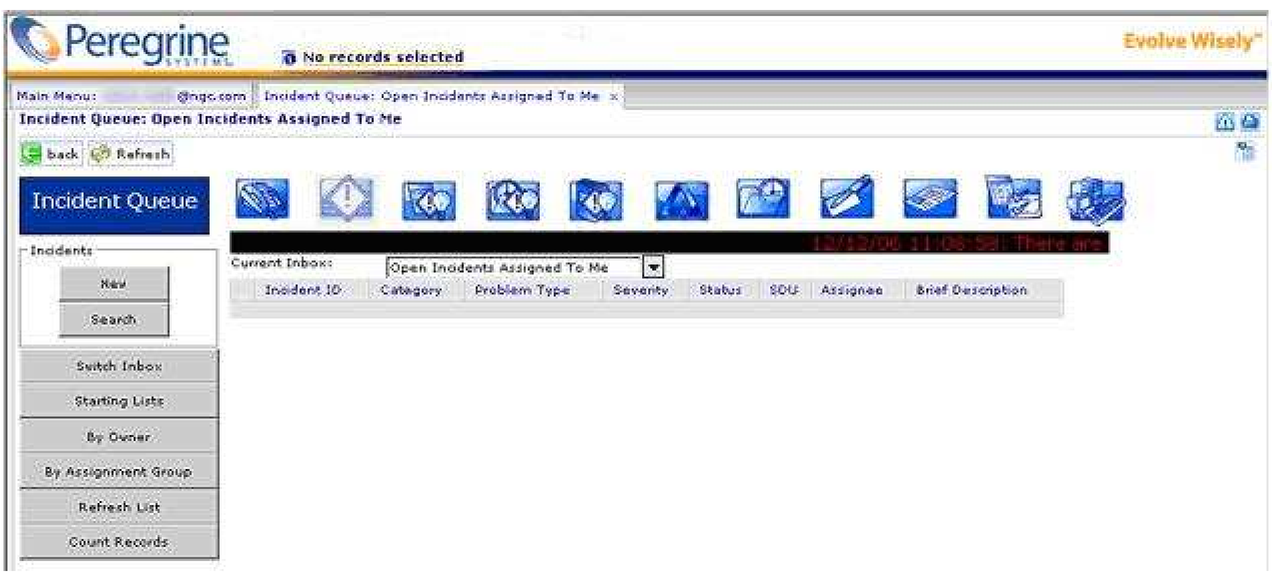
Lesson 3: Searching/Querying an Incident Ticket

1. To begin a basic search, click on the View Work Queues icon located on the ServiceCenter® Editor to find the ticket.



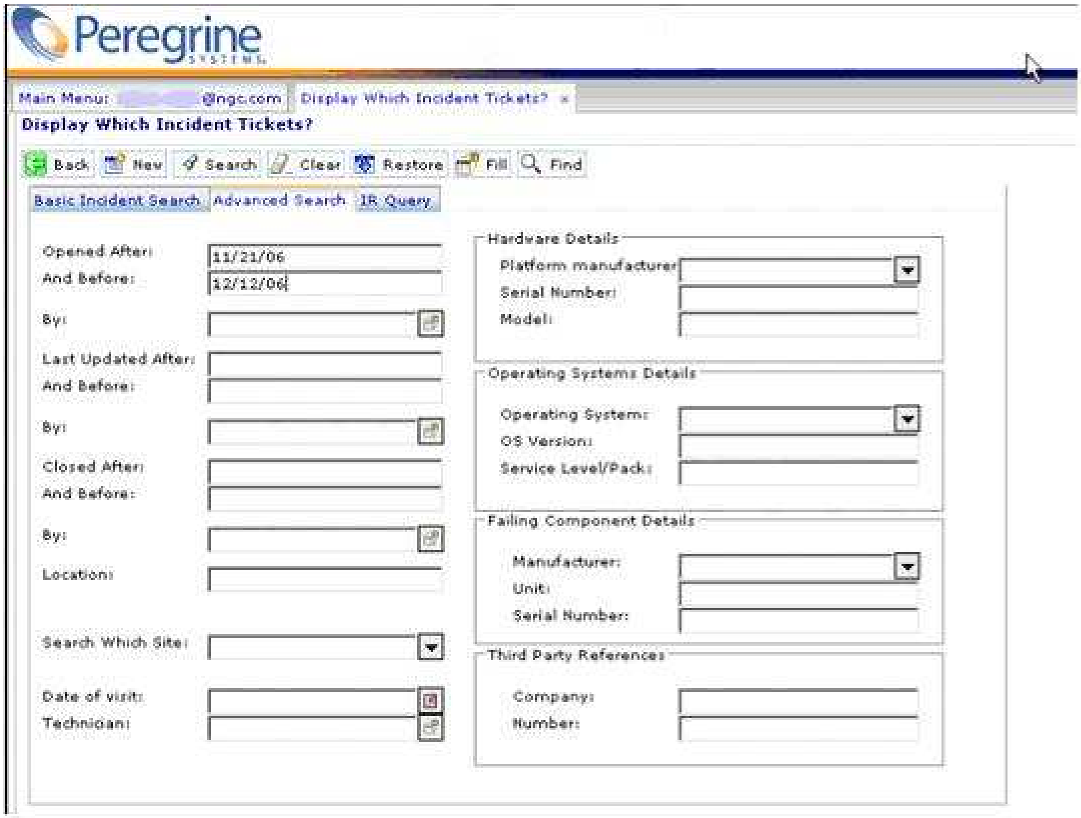
Note: You are now the **Incident Queue**.

2. To continue the basic search, click the **Search** button located directly below *Incident Queue*.

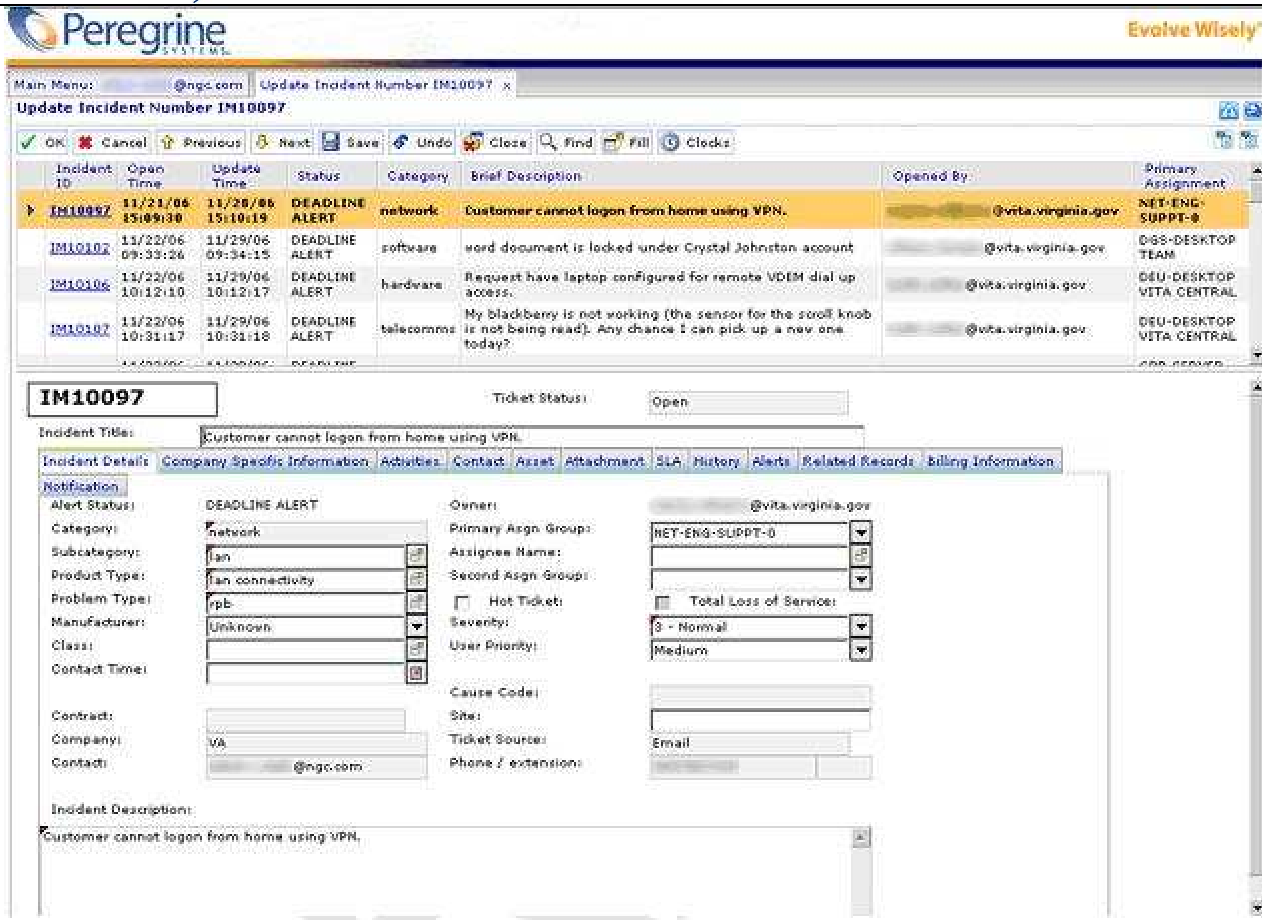


3. If the ticket number is available enter it into the text box and click **Search**. If you do not have the ticket number there are additional search criteria available.
4. For additional search options, select the Primary Assignment Group, Contact Name, etc.

Note: The options below may be changed to filter the search to specific ticket details.

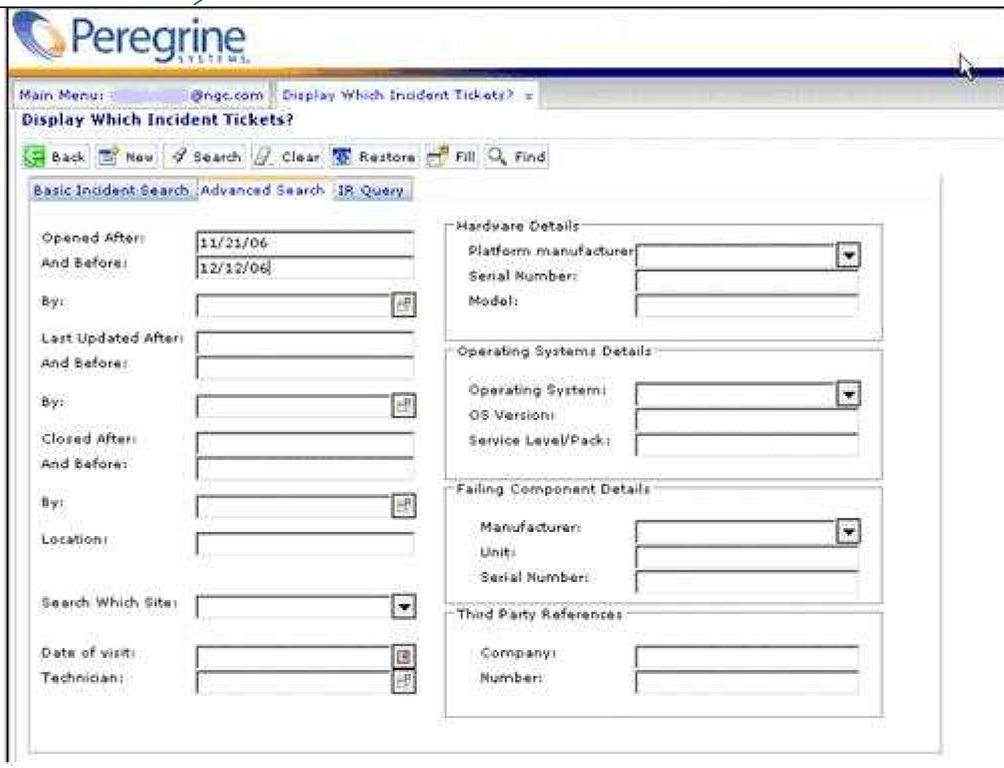


5. The results of a basic search by incident, IM10007 or 10007, see the highlighted gold bar below.

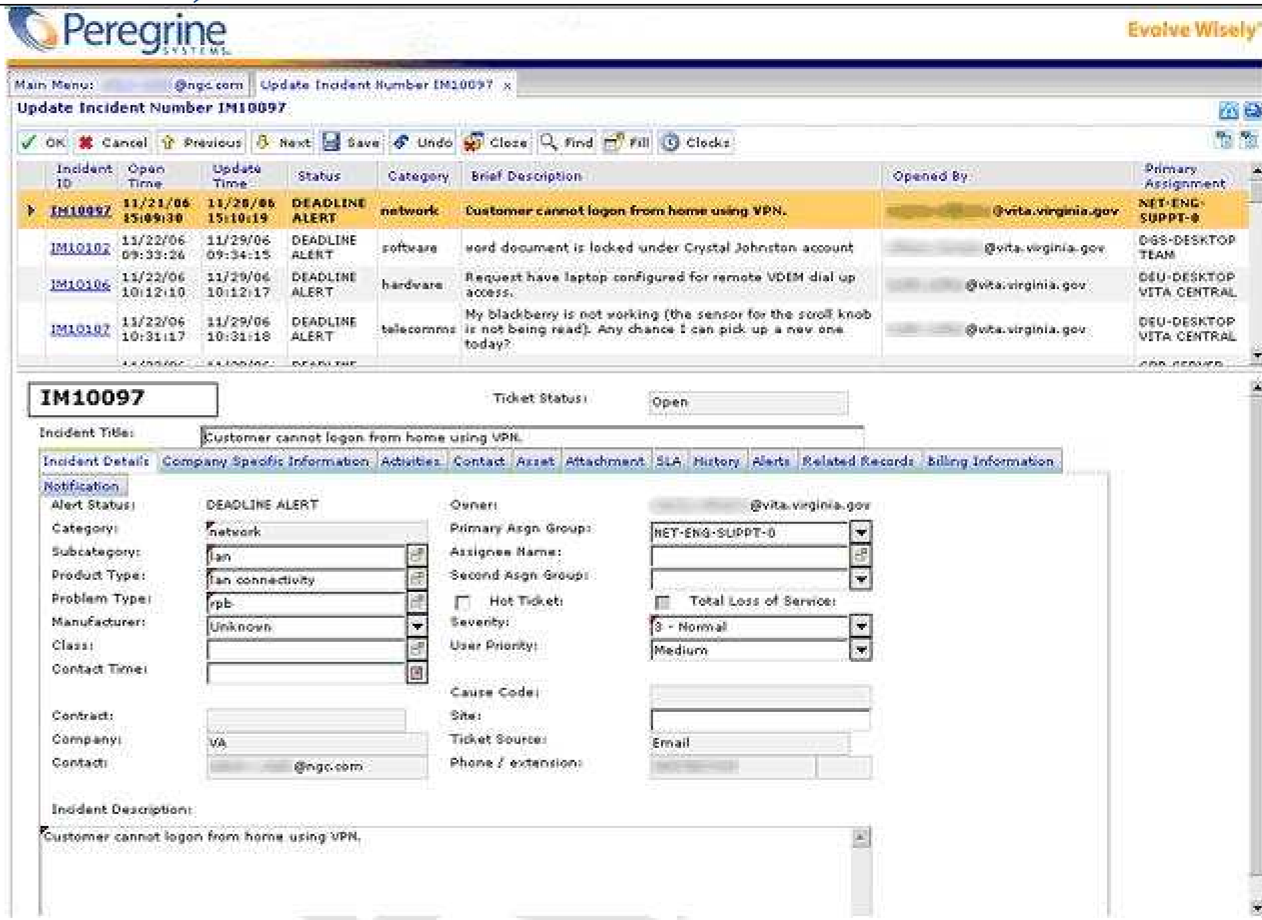


6. The Advanced Search is optional, click the **Advanced Search** tab. To use dates as a search criteria enter the dates. Open After: 11/12/06 and before: 12/12/06. Click **Search** again.

Note: The additional search options are located in the **Advanced Search** tab and *IR Query*.

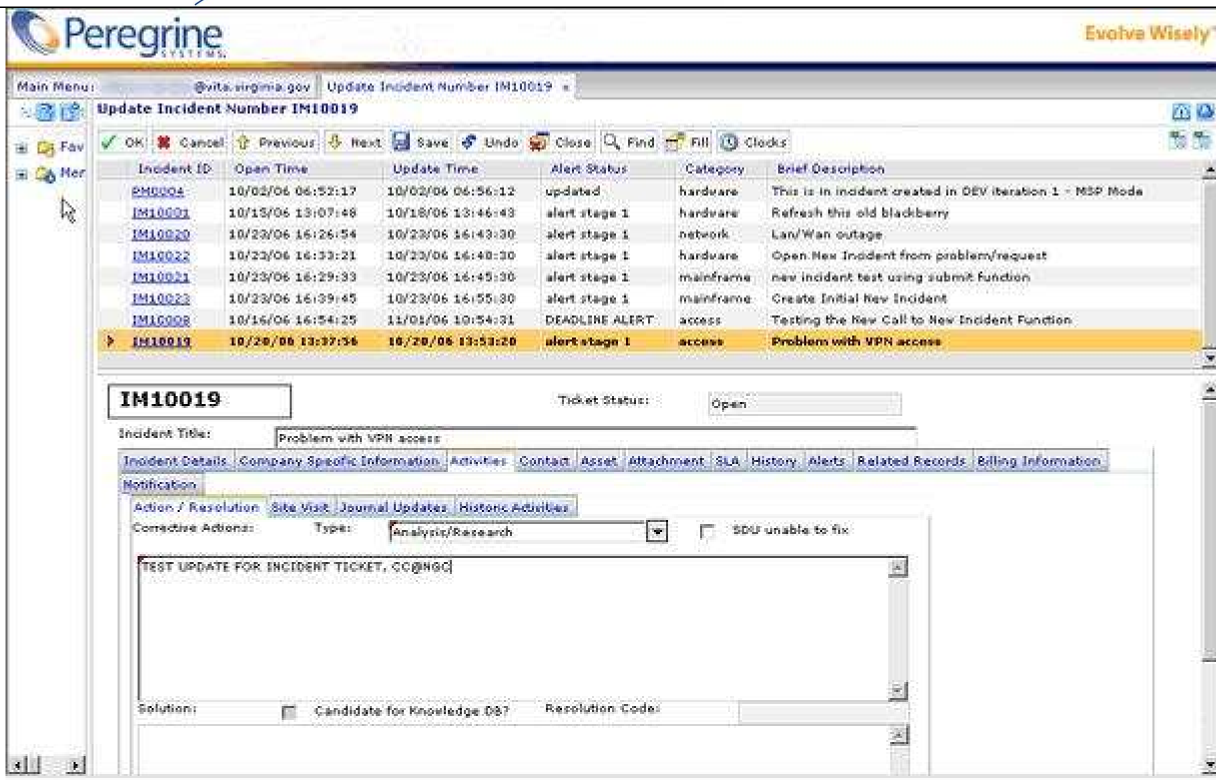


7. The screen below is the result of an advanced search option. The options were modified to find tickets that were: **Open After:** **11/12/06** and **Before:** **12/12/06**.

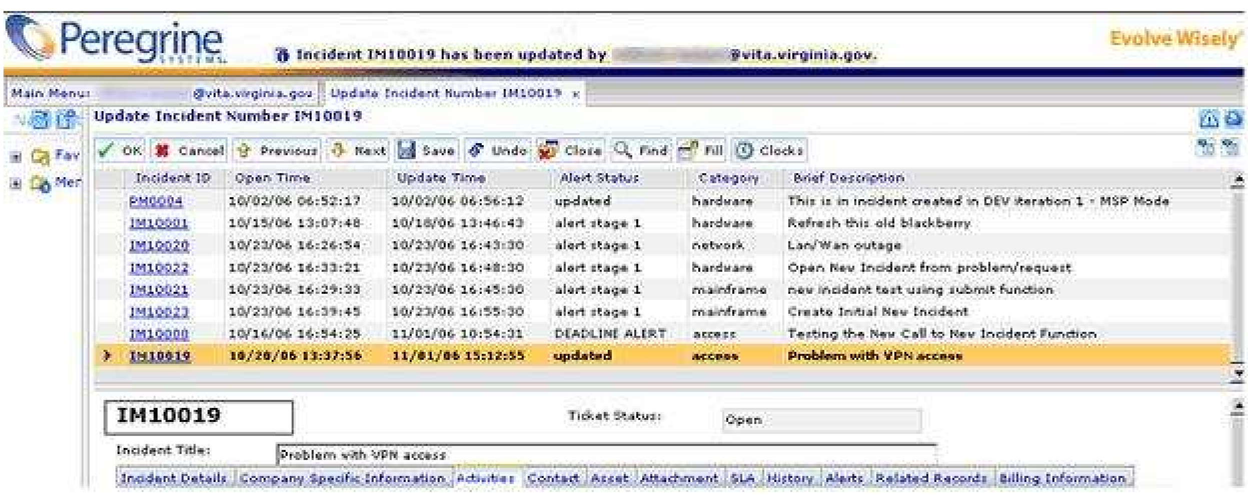


LESSON 4: UPDATING AN INCIDENT TICKET

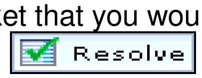
1. To update an Incident you must first search for the Incident Ticket number.
2. Next click the **Activities** tab, within the **Activities** tab click the **Action/Resolution** tab.
3. Select the **Type**; use the drop down arrow, next fill in the **Corrective Actions** edit box.
4. Click the **Save** button.

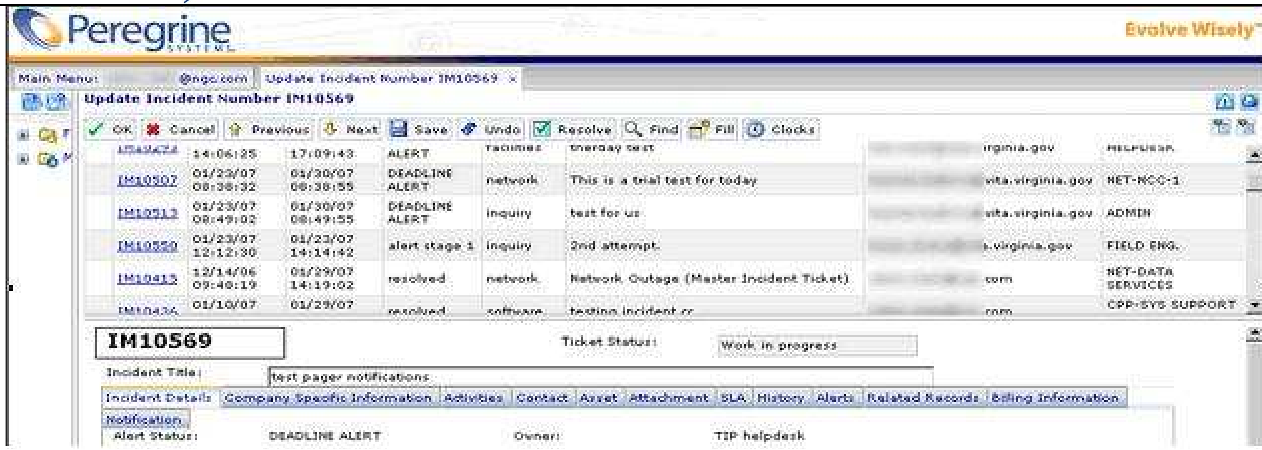


5. The system message will display at the top of the page indicating the incident has been updated.

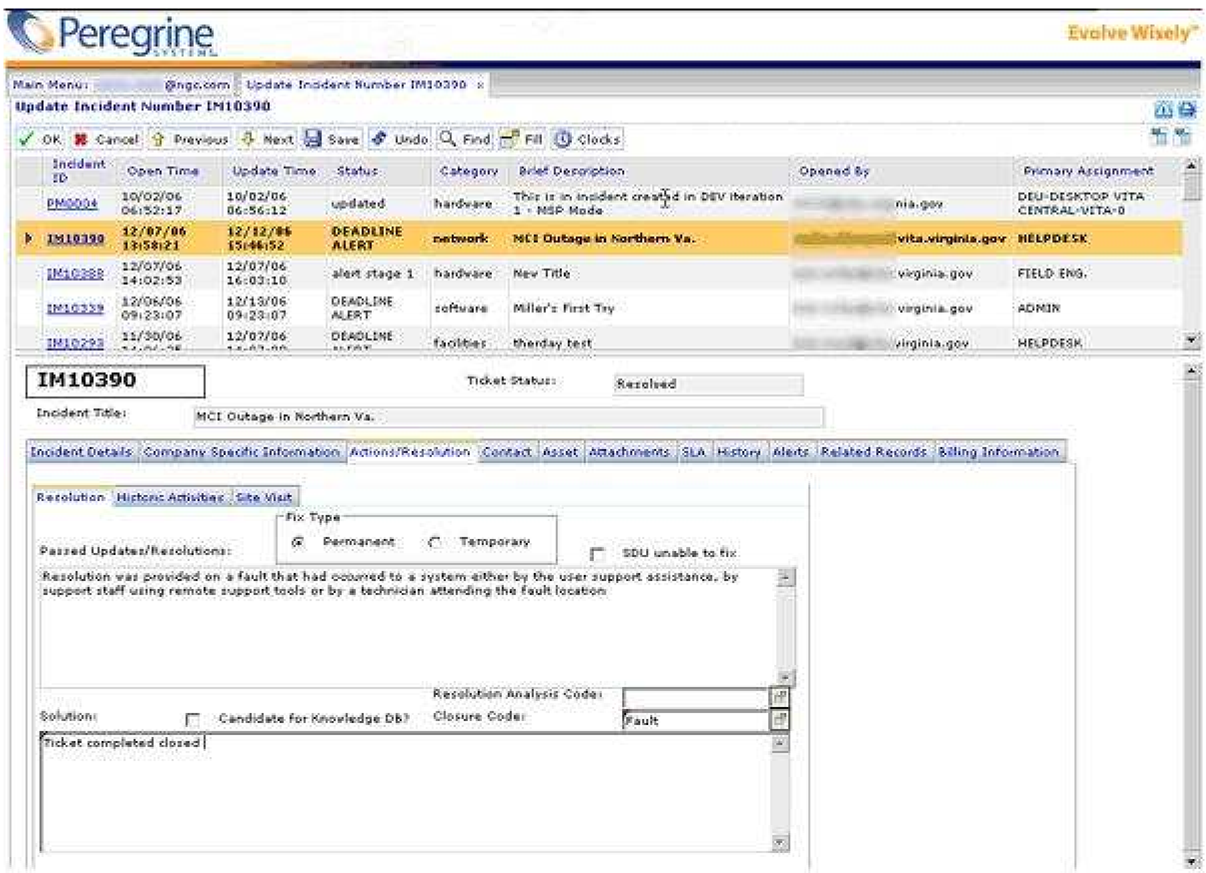


LESSON 5: RESOLVING AN INCIDENT TICKET

1. To locate the Incident ticket that you would like to resolve, search the Incident Queue.
2. Click the Resolve button. 

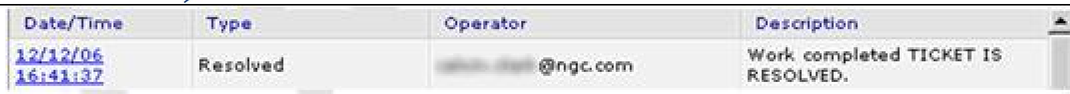


3. Click the Action/Resolution tab to continue the resolve process.
4. Select the Fix Type, fill in the Solution, with the ticket details, next click the Closure Code Fill Form button. Select the appropriate Closure Code from the list of options.
5. Click **Save,** (the ticket status will change to **Resolved**).

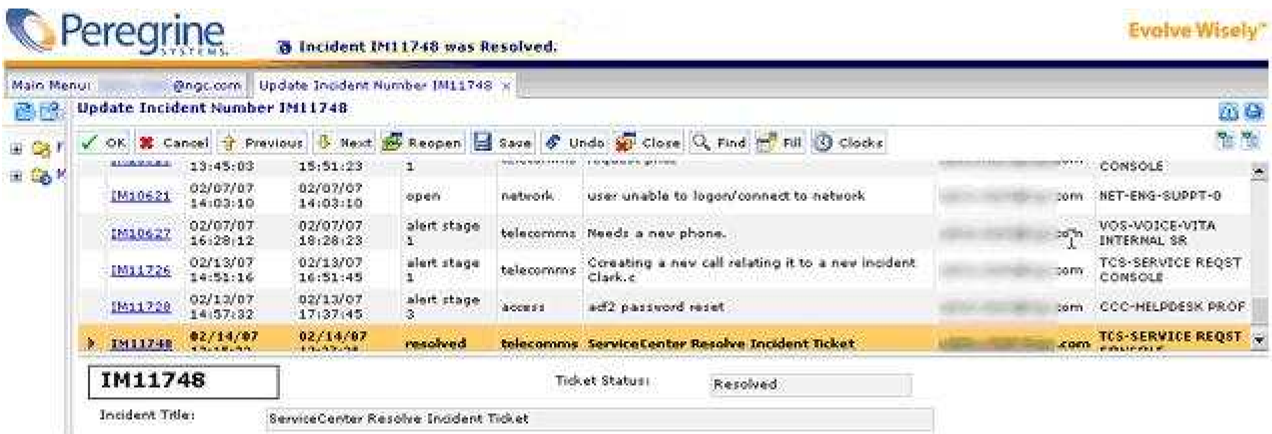


CAUTION: Check the top of page for the System Message after the process has been saved.

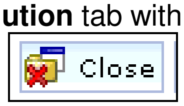
6. You may check the Historical Activities tab to ensure the ticket has been updated.

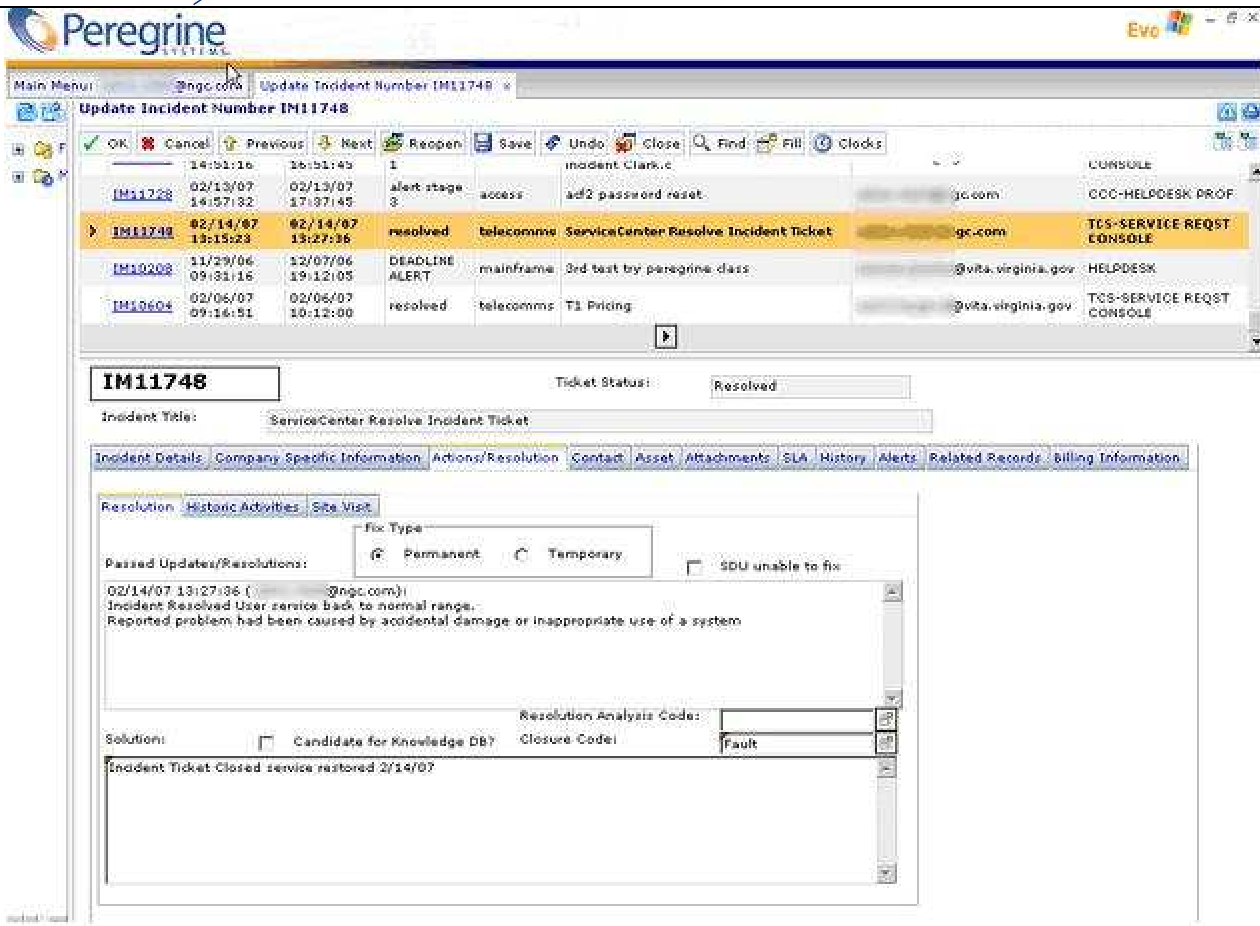


7. The system message will display at the top of the page indicating the incident was resolved.
8. The system will also send out a ServiceCenter notification to the designated email.

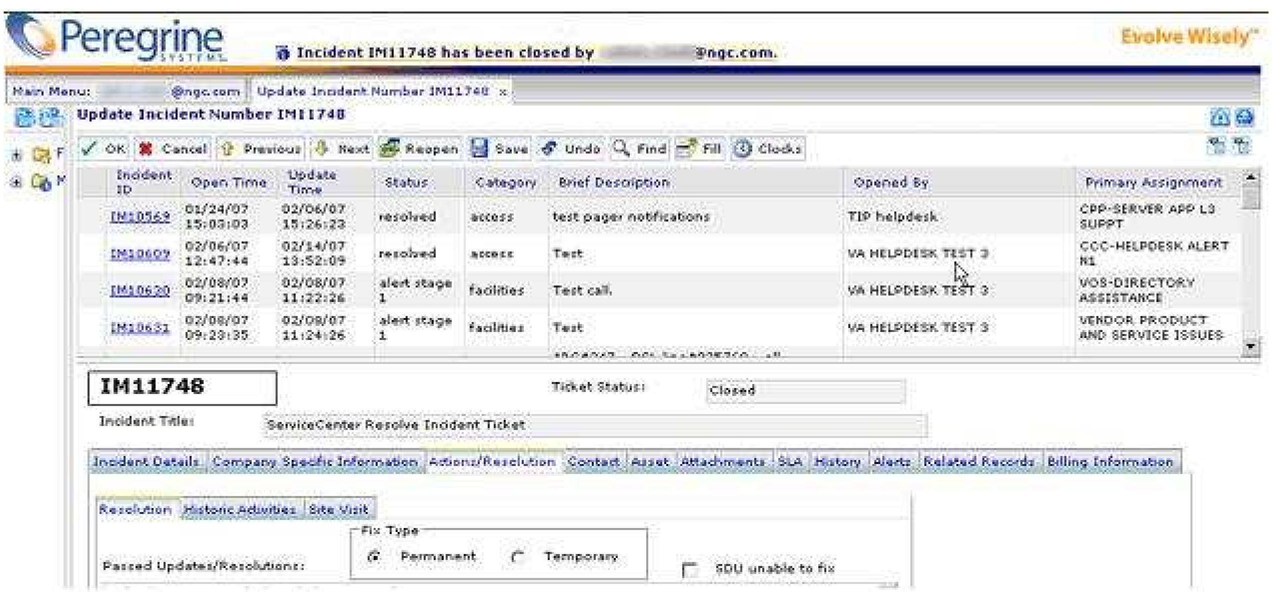


LESSON 6: CLOSING AN INCIDENT TICKET

1. To locate the Incident that you would like to close, search within the Incident Queue.
2. Go to the **Action**/**Resolution** tab within the **Resolution** tab; enter a **Solution** in the text box.
3. Click the **Close** button. 

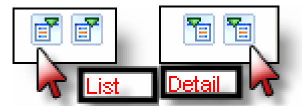


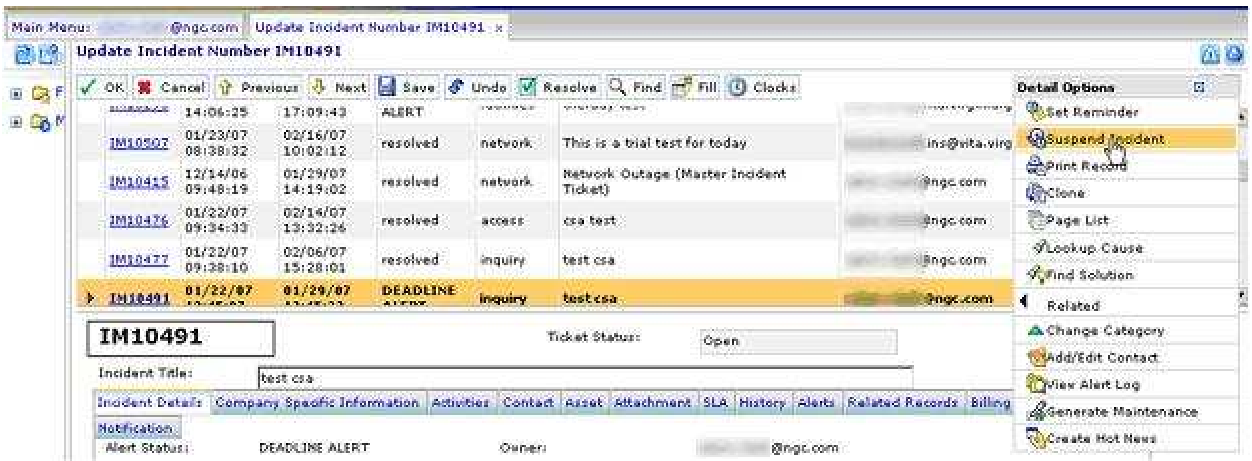
4. A system message will display at the top of the page indicating the incident has been **Closed**.



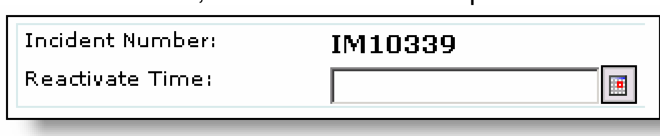
LESSON 7: SUSPEND AN INCIDENT TICKET

1. To change the ticket status to **Suspend**, locate the incident that you would like to suspend, search within the Incident Queue. There are two icons located on the far right side of the Incident ticket, the **List** icon and the **Detail** icon. To change the ticket status to suspend, click the **Detail** icon then click the **Suspend Incident** option.

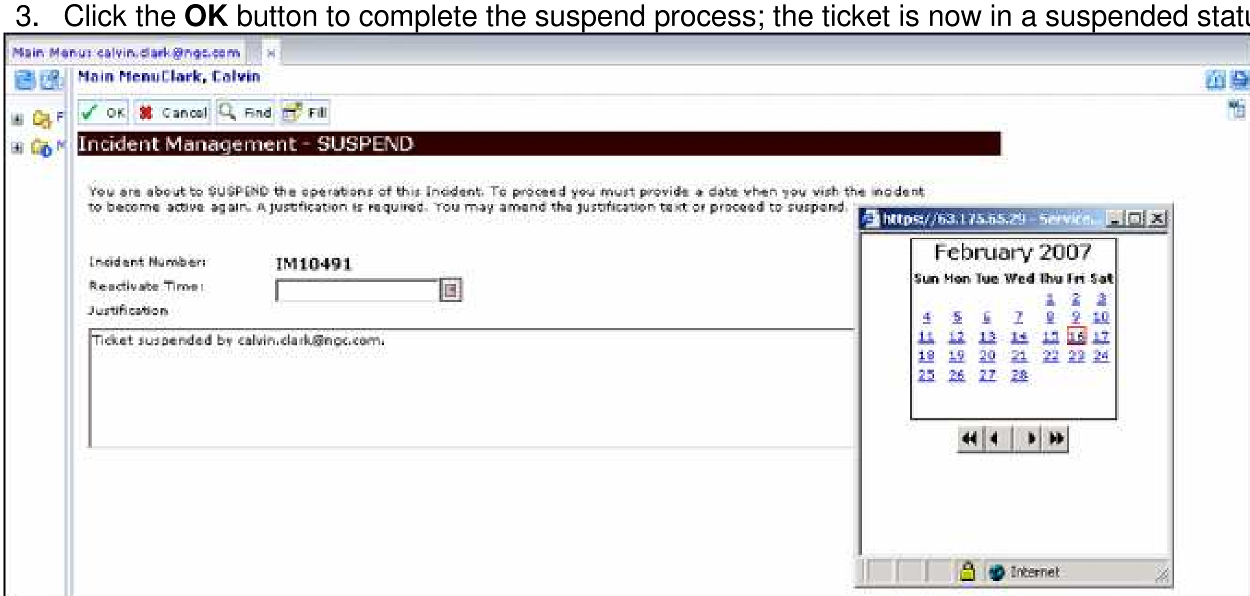




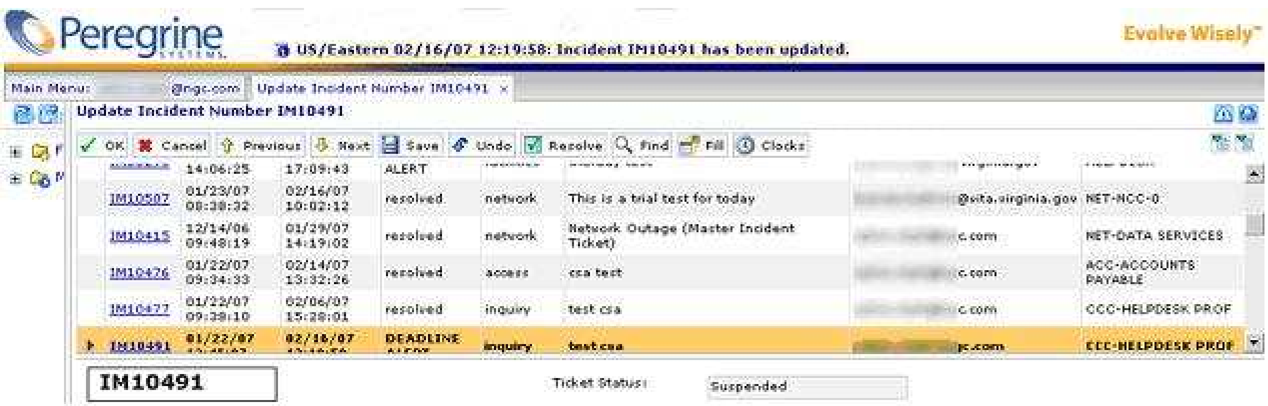
2. Next click the **Open Calendar** icon, select the ticket suspend **date** and **time.**



3. Click the **OK** button to complete the suspend process; the ticket is now in a suspended status.



Note: While in a suspended status the ticket escalation process stops. The **Unsuspend** tab is located in the location as the **Suspend** tab.

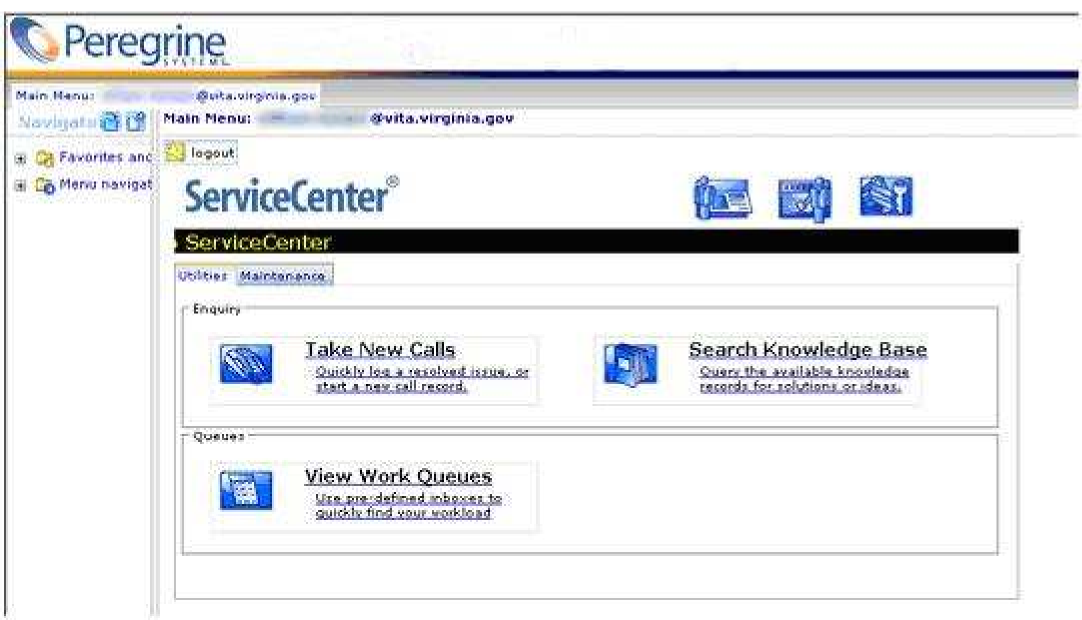


LESSON 8: CREATE/EDIT CONTACT INFORMATION

Note: When adding or editing use all lower case in the contact name (**jane.doe@vita.virginia.gov**; **john.doe@dmhmrsas.virginia.gov**).

1. Click the Take New Calls icon located on the ServiceCenter Editor.

CAUTION: This process follows the Take New Call procedure. Perform a thorough search to verify that the User's information is in the database. If the contact information is not found follow the procedures below.

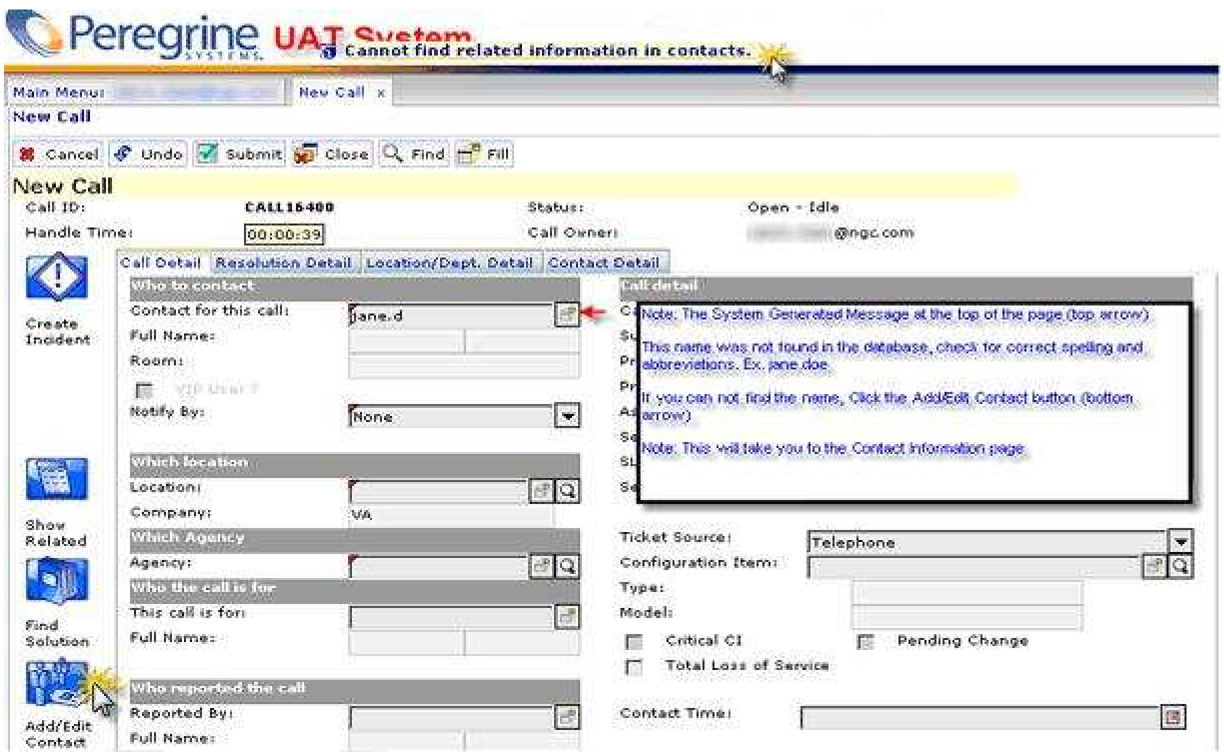


Note: The red triangle in the top left corner of any text box indicates mandatory data. Use the **Fill Form** tab located at the right corner of each text box to auto-fill data.

2. Next fill in the **Contact for this call,** enter the first name and the first initial of the last name, this is commonly referred to as the Login ID. If the caller's name is **jane.doe@vita.virginia.gov**, enter *jane.d* into the text box and click the **Fill Form** button. If the caller is listed in the database the

name will appear as listed below. Select the appropriate name from the list of names.

3. If the contact name is not listed, a system generated message will appear at the top of the screen indicating "Cannot find related information in contacts".



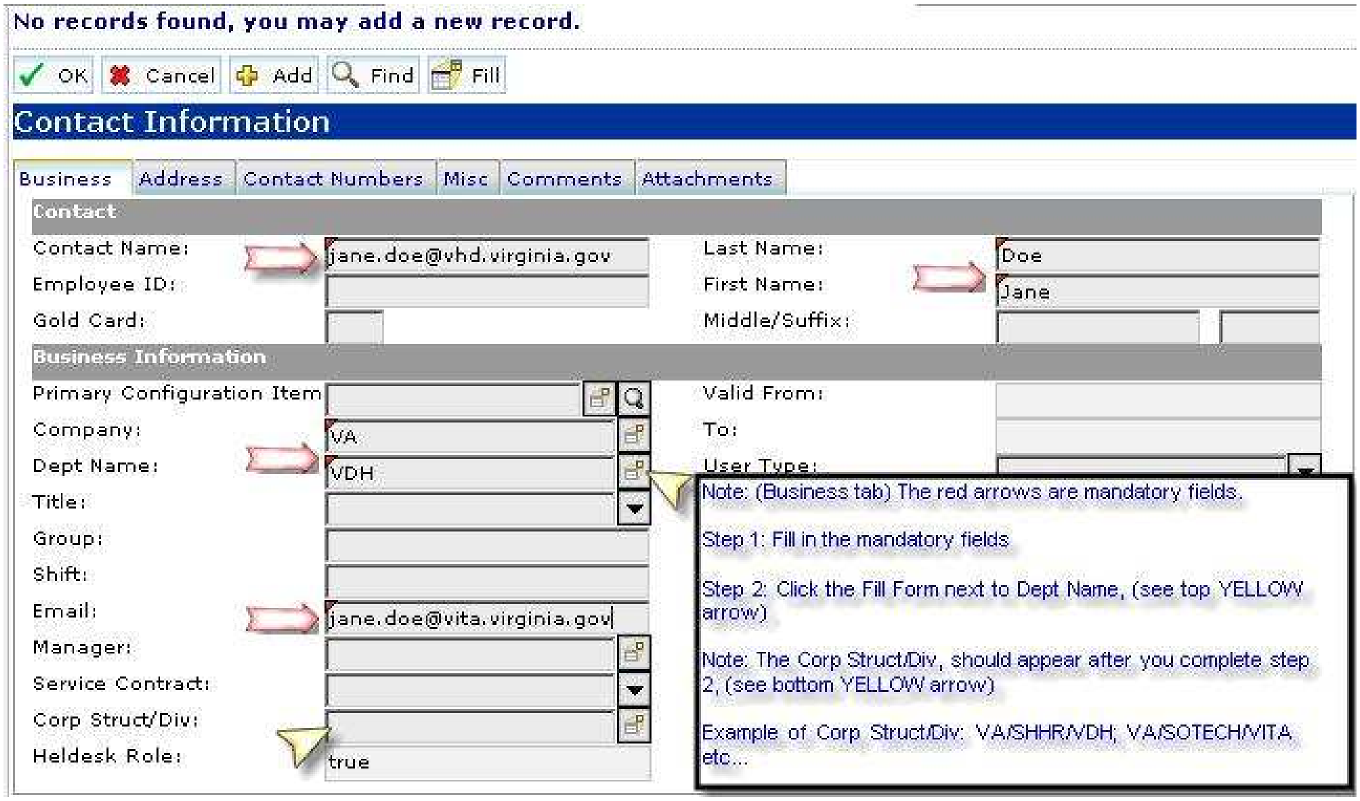
4. To add a new contact click the **Add/Edit Contact** icon.

CAUTION: If the Add button does not appear at the top of the screen you have not performed the previous steps correctly. Pay close attention to typing errors or misspelled information. You do not have the permission to delete contact information after it has been saved.

Note: See the **Add** button below for new contact; ensure that the information is entered correctly.

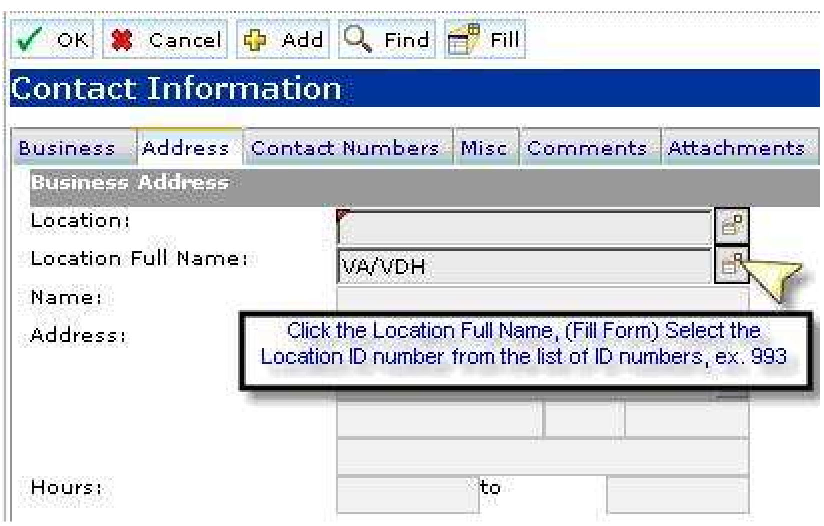
5. For **Contact Name** enter the complete email/login id (all lower case), **jane.doe@vita.virginia.gov**, **john.doe@dmhmrsas.virginia.gov**. Examples of common errors or misspelled information include **JOHN.DOE@VITA.VIRGINIA.GOV**, **John.Doe@vita.virginia.gov**, **john.doe@vtia.virginia.gov**, **Jane.doe@vita.virginia.gov**, **Robert.simth@vdh.virginia.gov**, and **anne.taylor@vdh.virginia.gvo**.
6. For **Company** enter VA in capital letters. For **Department Name** enter VITA, VDOT, VDH, DMHMRSAS, etc. Click the Fill Form button (top yellow arrow).
7. For **Email** enter the email account to receive ServiceCenter notifications, this may be different

from the contact name email.



Note: The **Corp Struct/Div** will auto fill after the Fill Form button is activated (bottom yellow arrow).

8. Enter the Last name and First name.
9. Click the Address tab; enter the Dept and Company name (VA/VDH, VA/VITA, VA/DMHMRSAS, etc.). Click the Fill Form (yellow arrow).

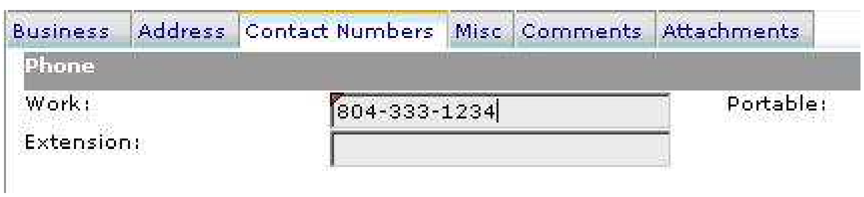


Note: A list of Location ID number will appear, select the appropriate number.

Location ID	Location Name	Address	City	Zip Code	Primary Contact	Country
VDH	HEALTH, DEPT OF					
995	PIEDMONT HD - BUCKINGHAM COUNTY	Highway 60	Buckingham	23921		UNITED STATES
994	PIEDMONT HD - AMELIA COUNTY	16320 Church Street	Amelia	23002		UNITED STATES
993	HENRICO HD - HENRICO COUNTY HQ - WEST END	8600 Dixon Powers Drive	Richmond	23228		UNITED STATES
992	HENRICO HD - HENRICO COUNTY HQ - EAST END	3810 Nine Mile Road	Richmond	23223		UNITED STATES
990	CHICKAHOMINY HD - HANOVER COUNTY	12312 Washington Highway	Ashland	23005		UNITED STATES

10. The Location ID will auto-fill according to the number selected.

11. Click the **Contact Numbers** tab, enter contact phone number.



Note: Double check the **Address** and **Business** tabs, if the information is correct, click the **Add** button.

12. To return to the Take New Call ticket click the **OK** button.

ServiceCenter® Training Tip: Quick Reference Card

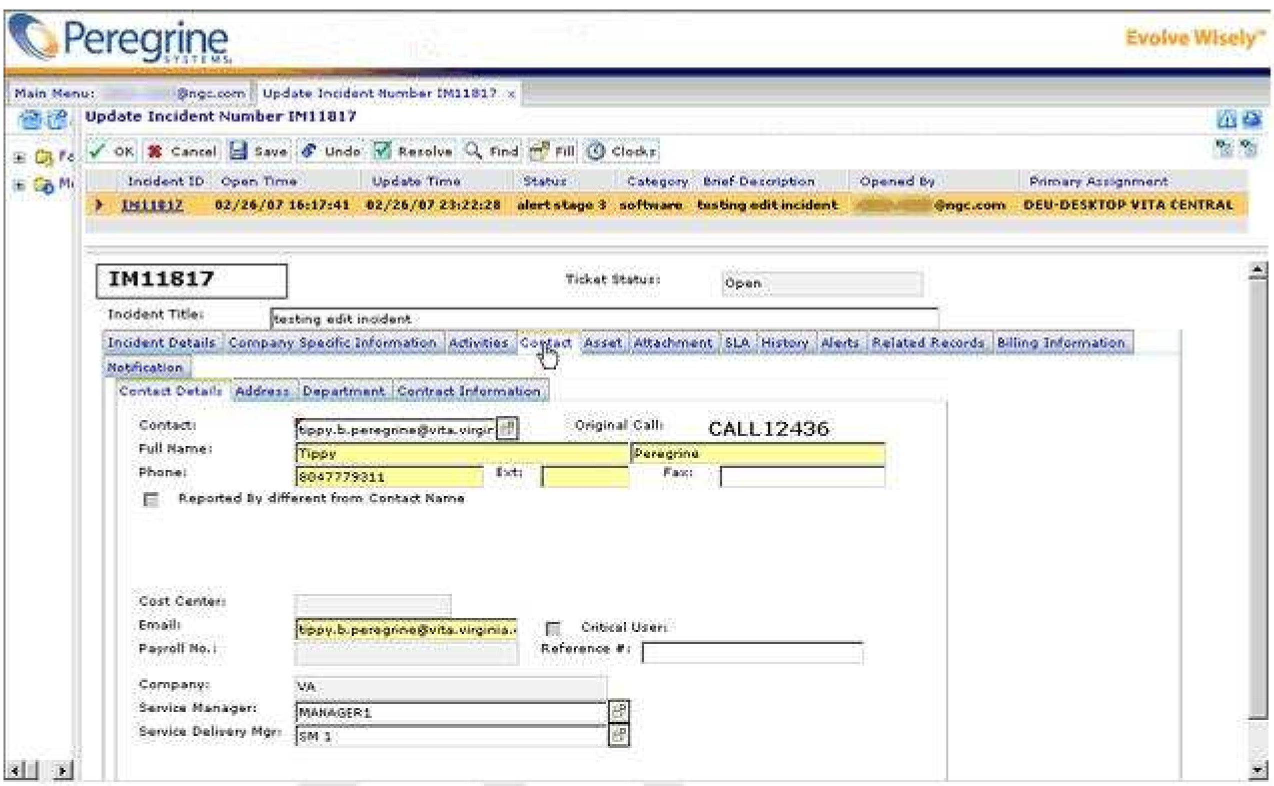
Step 1: Fill in Contact Name, all lower case (prefer agency email)
Step 2: Company: always VA must be CAPITALIZED
Step 3: Dept Name: equals agency VDH, DMHMRSAS, VITA, etc... CAPITALIZED
Step 4: Email: ServiceCenter notifications sent here
Step 5: Last & First Name
Step 6: Click the Fill Form next to Dept Name text box, (yellow arrow)
Step 7: Click the (Adress tab)
Step 8: Enter VA/VDH; VA/VITA; VA/DMHMRSAS etc... in the (Location Full Name) CAPITALIZED
Step 9: Click the Fill Form on the (Location Full Name) text box, (yellow arrow)
Step 10: Select the appropriate Location ID number, this will auto fill the MANDATORY, Location text box
Step 11: Enter a phone number 804-123-4567
Step 12: Click the Add button
Note: (Record has been added to contacts) message
Step 13: Click the OK button to return to New Call ticket
(Task Complete)

Note: The next topic demonstrates how to Edit contact information generated from an Incident.

EDIT CONTACT INFORMATION (INCIDENT TICKET)

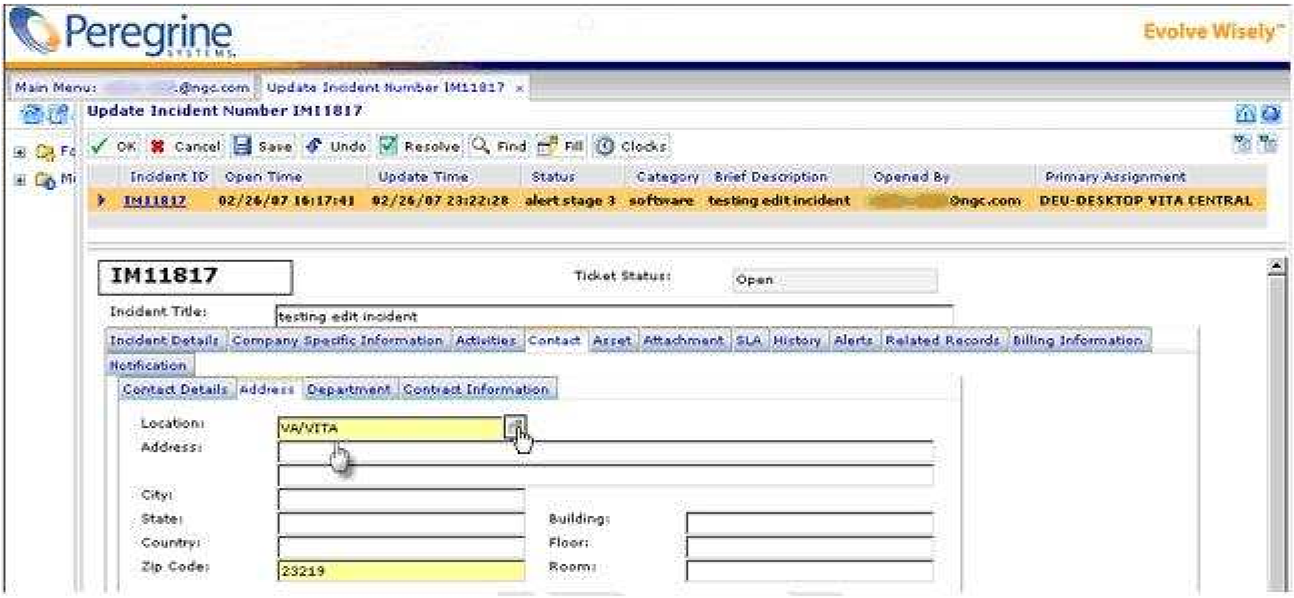
Note: The operator received changes in information from the user.

1. To update the contact information click the **Contact** tab. The highlighted text boxes are the common areas that require editing.



2. Click the **Address** tab to begin the edit process.
3. To change the Location remove the current name, VA/VITA/50 and replace with the new agency location (VA/VDH, VA/DMHMRSAS, VA/VDOT, etc.). Click the **Location Fill Form** button.

Note: This will filter your search criteria from the current location to the new agency name.



4. Select the appropriate Location ID. The new agency Location ID will auto-fill based on the new selection.

5. Select the **Activities** tab enter a journal entry to reflect the new changes.

Note: If you click the save button before you update the ticket the message below will appear.

Note: After you provide the update the system generated message below will appear.

LESSON 9: CREATE AND RESOLVE A CUSTOMER SERVICE ALERT (CSA)

Customer Service Alerts (CSA) are notifications used to report significant outages or conditions that likely have high external visibility. There are two general scenarios which may justify creating a CSA, an engineer declared outage or a customer requested outage.

An Engineer Declared outage is when the Service Desk Analyst follows the Call > Incident normal ticket routine and the Incident ticket is routed to the selected assignment group. The Service Desk or engineer within the assignment group is responsible to initiate the CSA Notification tab. Some one within the assignment group activates the Notification tab and selects **CSA Notification** from **Type** drop down arrow. Always save your changes.

A Customer Request CSA is a notification from an outside agency reporting a critical outage. The Service Desk Analyst will follow the same procedures as above to include selecting the **Notification** tab and **CSA Notification** from the **Type** drop down arrow. Always save your changes.

Warning: When you select (Type 1 or 2 or 3) below, the watch outage group will be notified.

Type 1: CSA Initial (for initial notification only)
Type 2: CSA Update
Type 3: CSA Resolve
Type 4: Analysis/Research (watch outage group is not notified)
Type 5: Communication with Customer (user/customer notified)
Type 6: The Customer Service Alert has been initiated and is saved.

CAUTION: After the incident has been upgraded to critical and identified as a CSA complete the following procedures:

On the Notification tab:

Step 1: Click the **Fill Form** button next to the ID field
Step 2: Click the **Search** button to view and select the appropriate ID.
Step 3: Click the **Down Calendar** to select the date and down time of the reported outage.
Step 4: Click the **Activities** tab; make the appropriate selection from the drop down arrow.
Step 5: Fill-in the Action/Resolution (Corrective Actions) and click **Save.**

Update: To update the CSA, make your selection from (Type 2 or 4), click **Save.**

Resolve: To resolve the CSA

Step 1: On the **Notification** tab, click the **Up calendar** to select date and up time of the

reported outage
Note: This must be done before you select the resolve button.
Step 2: Click the **Resolve** button.
Step 3: Click the **Action**/**Resolution** tab.
Step 4: Select the **Fix Type**, **Closure Code**, and **Solution**.
Step 5: Click the **Save** button a notification will be send to the watch outage group

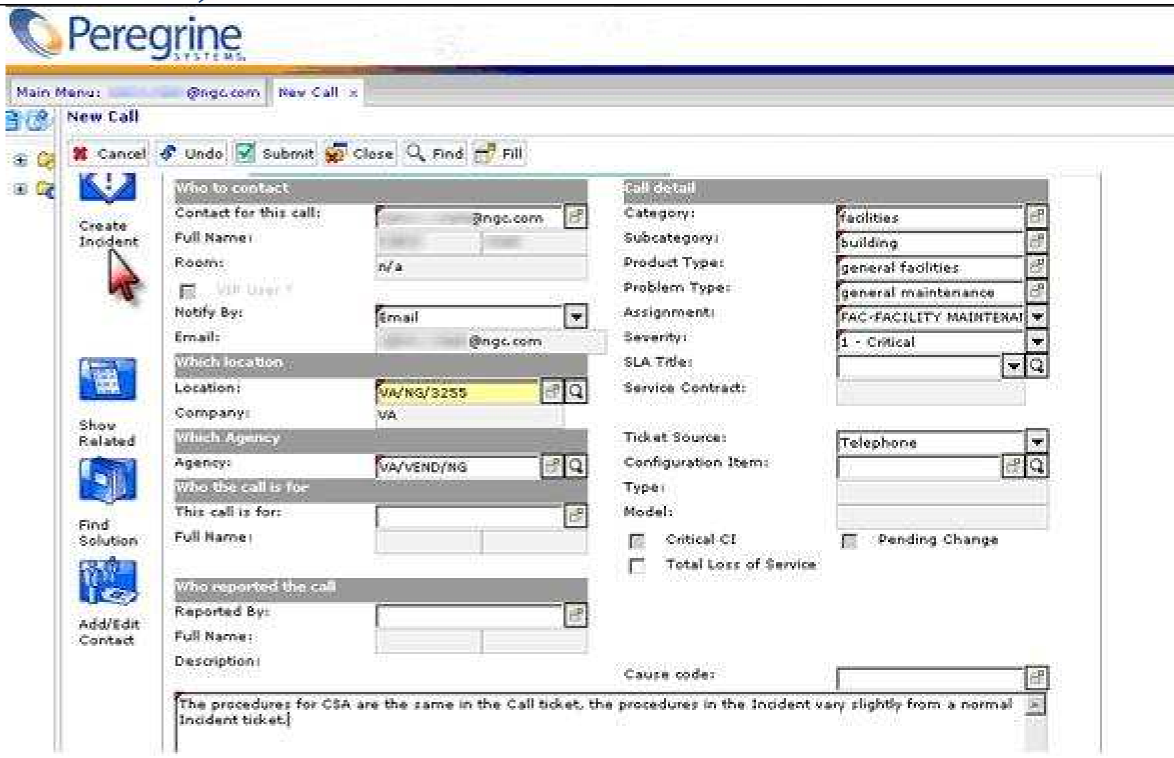
SERVICE DESK ANALYST

1. Click the **Take New Calls** icon located on the ServiceCenter® Menu.

Note: The screen shown on the next page will appear.

Note: The **red triangle** in the top left corner of any text box indicates mandatory data. Use the Fill Form tab located at the right corner of each text box.

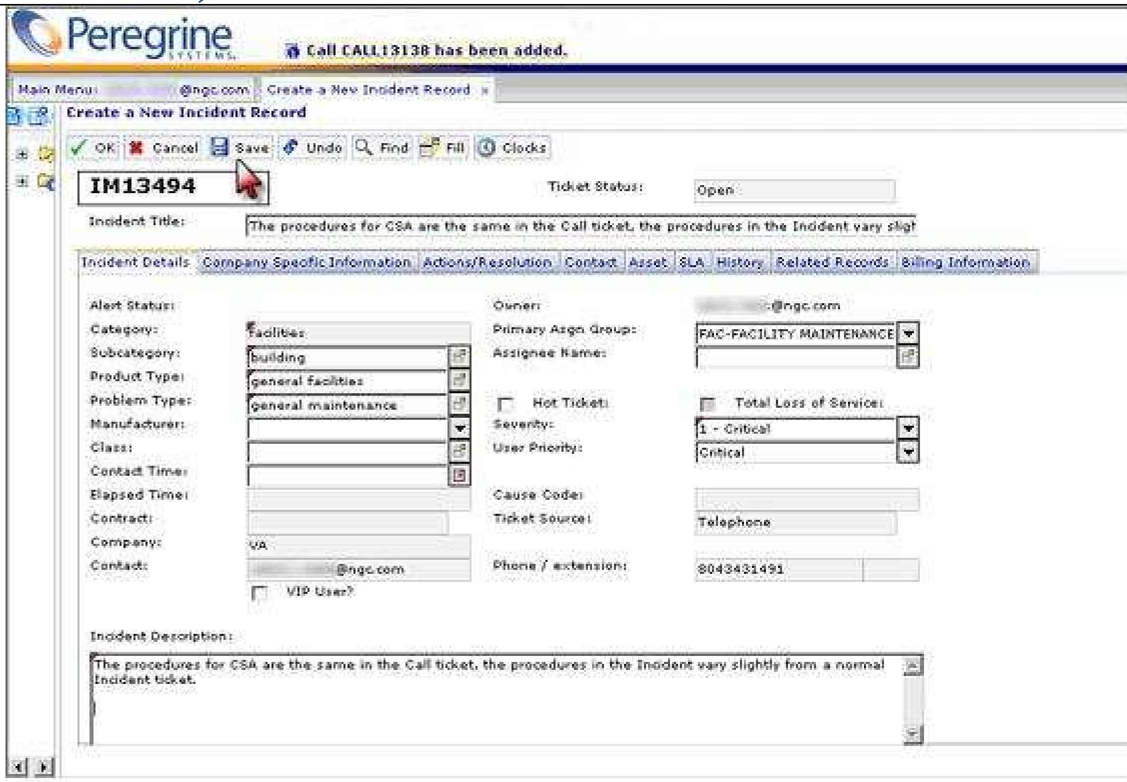
2. Fill in all of the required information identified by the **red triangle**.
3. Click the **Create Incident** icon, all the information will be transferred to the new incident ticket,



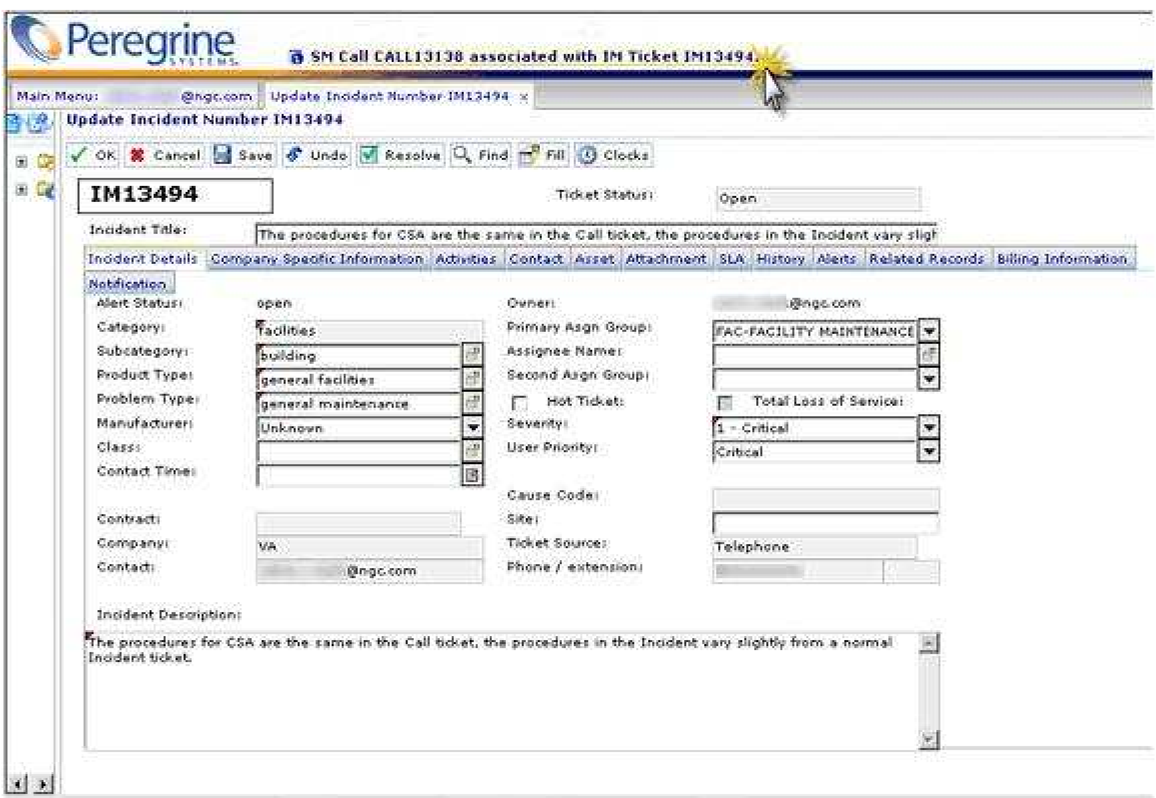
Note: The screen on the next page will appear.

Note: The system generated message indicating that the **Call has been added** below.

4. Click on the **Save** below to save the **Incident ticket** and relate it to the **Call ticket**.



Note: The "Call has been associated with an Incident".



5. Service Desk Analyst: To initiate a Customer Service Alert follow the procedures below:

a. Click on the Notification tab.
b. Within the Notification tab, click the **Fill Form** button next to the ID field.
c. Click the **Search** button to view and select the appropriate ID.
d. Click the **Down cale**ndar to select the date and down time of the reported outage.
e. Click the **Activities** tab; make the appropriate selection from the drop down arrow.
f. Fill in the Action/Resolution (**Corrective Actions**) and click **Save**.

Caution: When you select Type 1. 2. or 3 below the watch outage group will be notified.

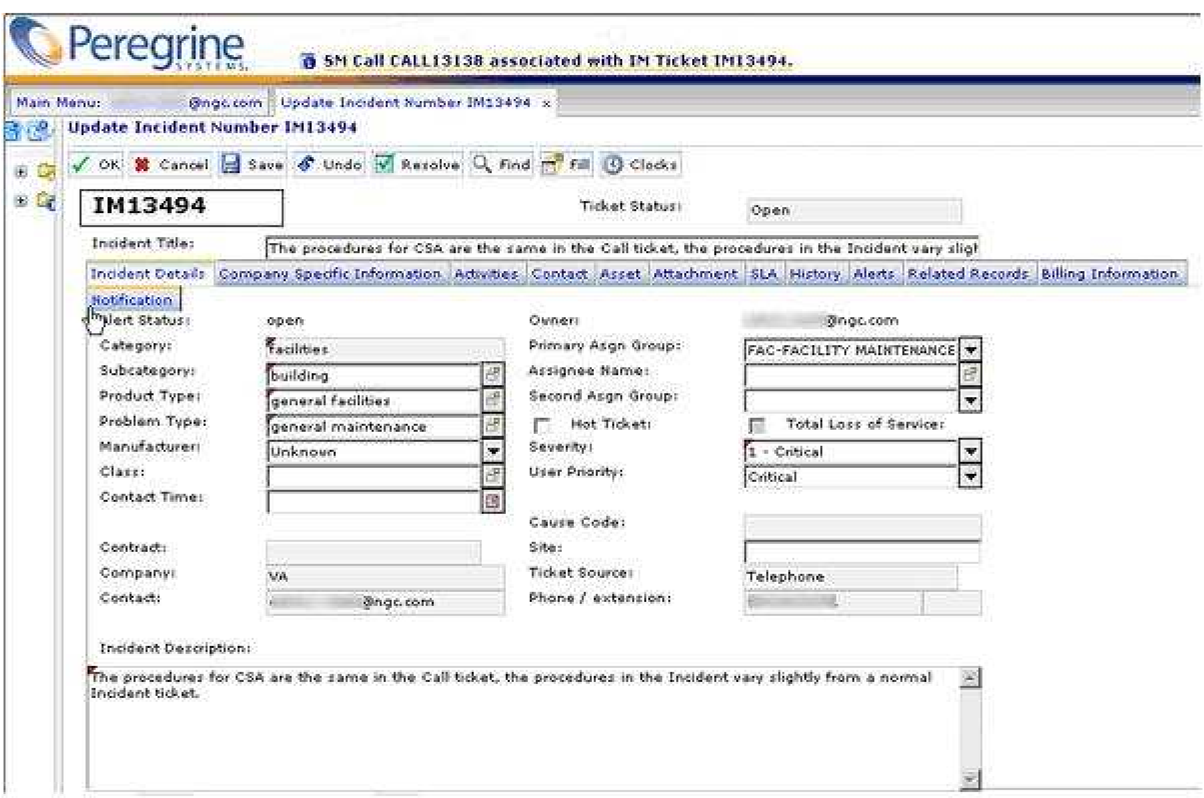
Type 1: CSA Initial (for initial notification only)
Type 2: CSA Update
Type 3: CSA Resolve
Type 4: Analysis/Research (watch outage group is not notified)
Type 5: Communication with Customer (user/customer notified)
Type 6: The Customer Service Alert has been initiated and is saved.

SERVICE DESK/ENGINEERS

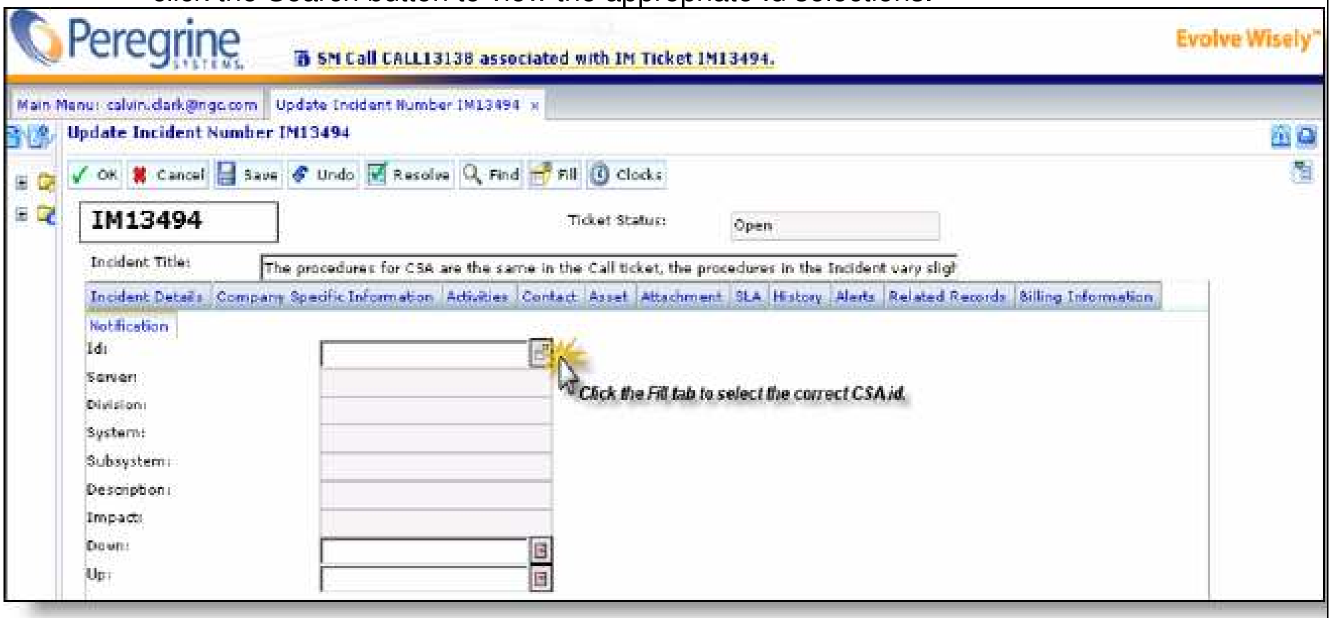
Service Desk/Engineers follow the procedures below for a Engineer Declared Customer Service Alert (CSA)

Note: The incident ticket was created by the Service Desk Analyst and assigned to the primary assignment group. Based on research and troubleshooting procedures the decision is made to create a CSA.

1. Engineer Declared CSA
   a. Step 1 – Click the **Notification** tab.

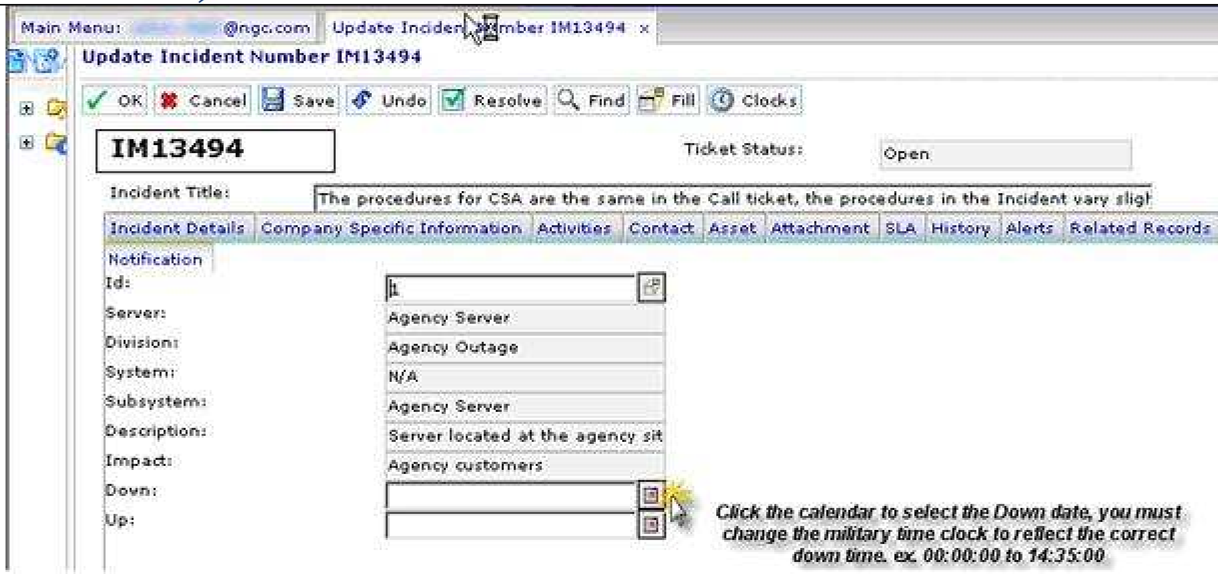


b. Step 2 – Within the **Notification** tab, click the **Fill Form** button next to the *ID* field, next click the Search button to view the appropriate Id selections.



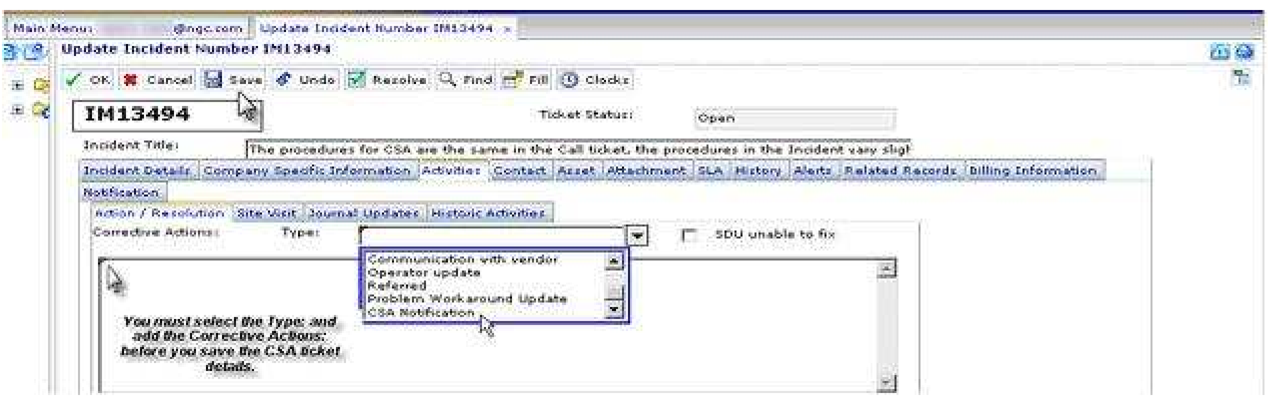
c. Step 3 – Select the appropriate Id number

d. Step 4 – Click the **Down calendar** to select the date and down time of the reported outage.



e. Step 5 – Click the **Activities** tab; select:
   i. Type 1 – CSA Initial (Use for initial notification only)
   ii. Type 2 – CSA Update (use for updates)
   iii. Type 3 – CSA Resolved (use to resolve)
   iv. Type 4 – Analysis/Research (watch outage group is notified, use for ticket notation.
   v. Type 5 – Communication with Customer (user/customer notified).

f. Step 6 – Fill-in the **Action**/**Resolution** (corrective actions) and click **Save**.

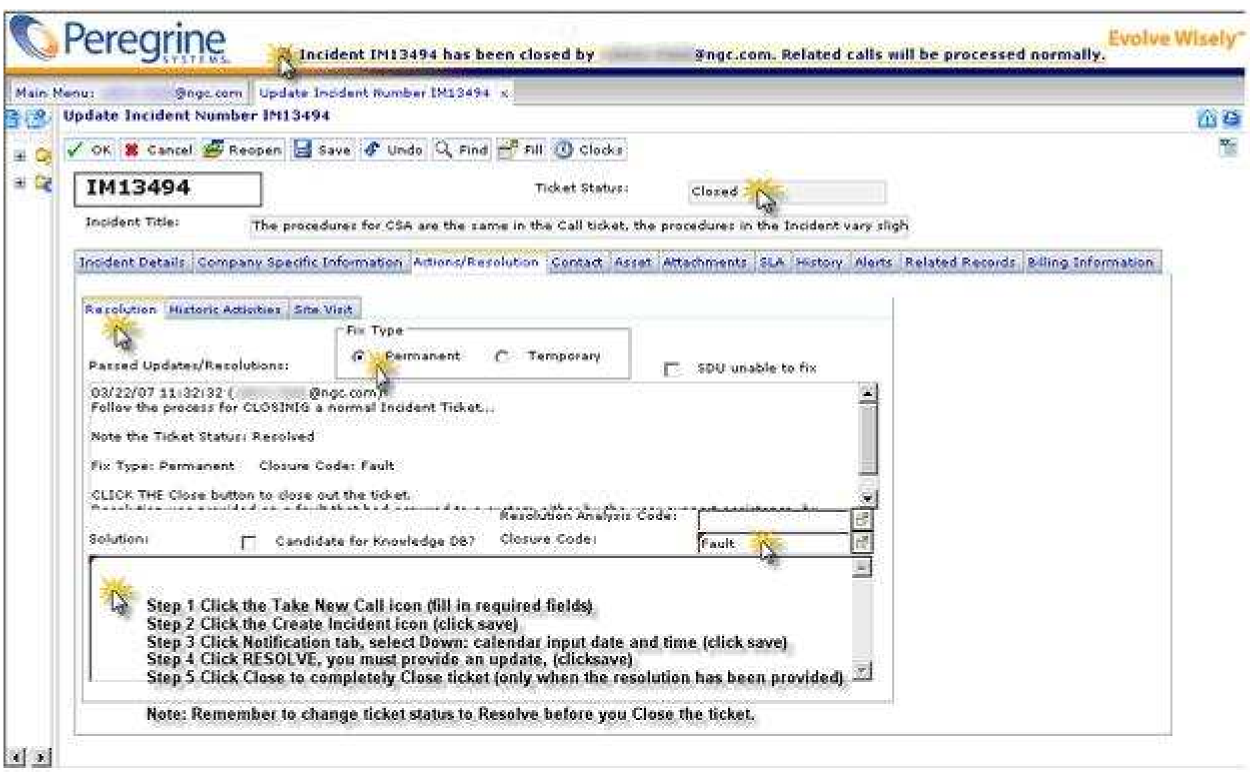


2. Optional – Click the **Journal Updates**/**Historic Activities** tabs to view saved updates.

3. To resolve the CSA
    a. Step 1 – On the Notification tab, click the Up calendar to select the date and up time of the reported outage (this must be done before you select the **Resolve** button).
    b. Step 2 – Click the **Resolve** button.
    c. Step 3 – Click the **Action**/**Resolution** tab.
    d. Step 4 – Select the **Fix Type**, **Closure Code** and **Solution**.
    e. Step 5 – Click the Save button (a notification will be sent to the watch outage group). The CSA is now in a Resolved status.

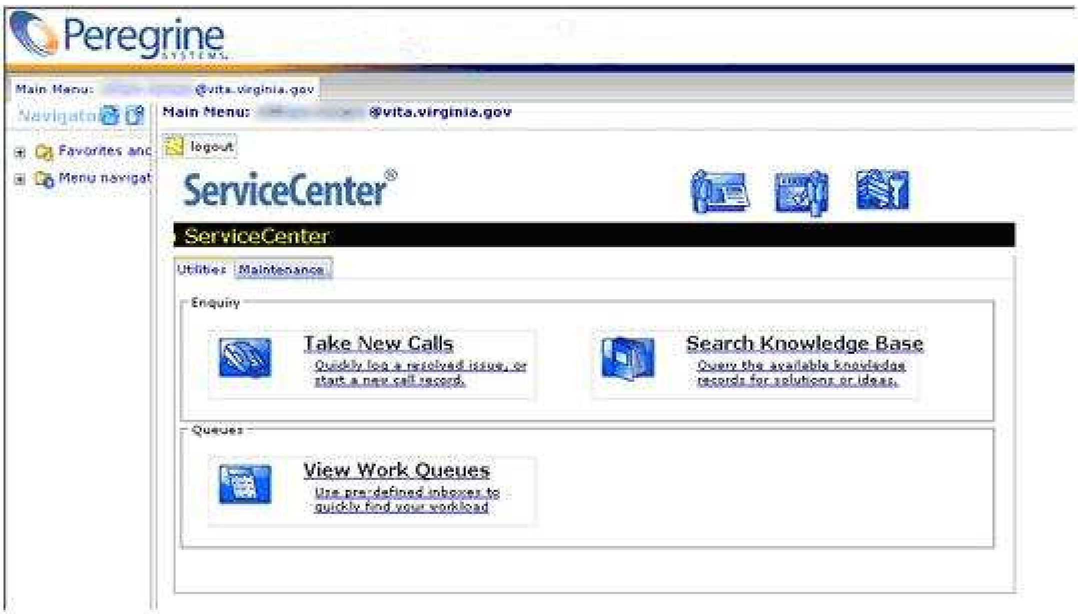
4. To close the CSA follow the same procedures used to close an Incident ticket.

Note: The figure below is provided as a quick reference only.



Lesson 10: How to Link a Related Call or Incident Ticket

1. Click the Take New Calls icon located on the ServiceCenter® Editor.

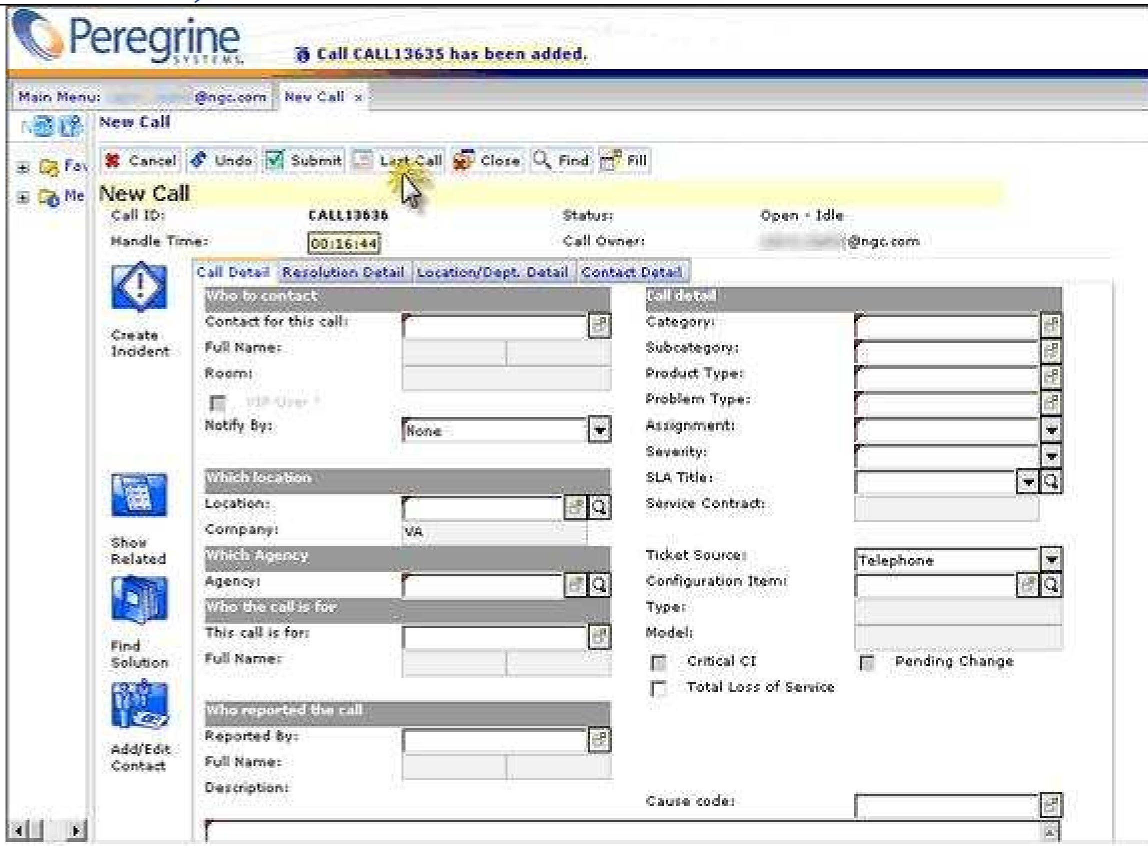


The screen on the next page will appear.

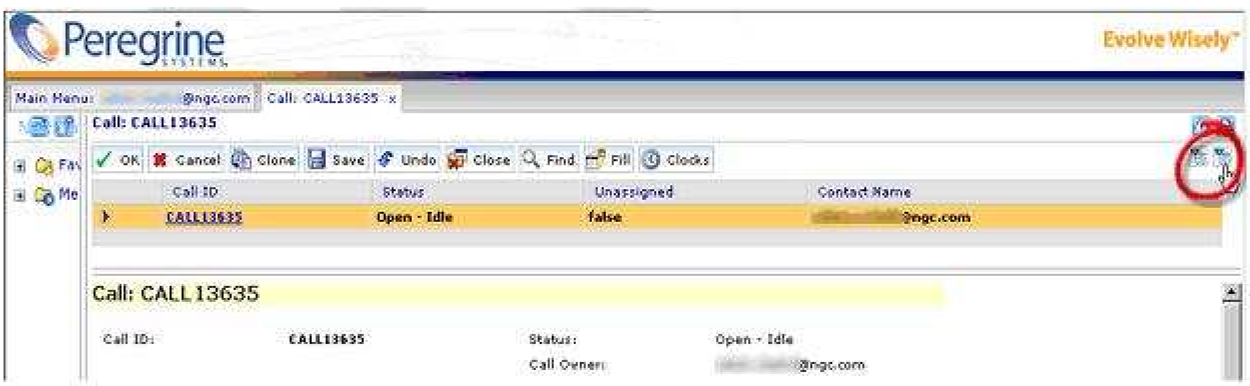
Note: The **red triangle** in the top left corner of any text box represents mandatory data. User the Fill Form tab located at the right corner of each text box.

2. Fill out the appropriate information in the **Call Detail** tab. The *Contact*, *Location*, *Agency*, *Call Detail* are mandatory.
3. The Contact Name is associated with the email account (**john.doe@vita.virginia.gov**). To filter your search you may begin with the first name (john), to filter even further (john.d), after entering the Call Name field, click the Fill Form icon located to the right of the text box. You must make your selection from the list of names provided by your search.
4. If there is only one name associated with the contact information, the *Form Fill* will auto populate the caller's information.
5. Click the Submit button, when the mandatory information has been filled in. A message at the top of screen will indicate that the call has been added.

6. The Call ticket is now saved in an Open-Idle Status, to locate the Call ticket click the **Last Call** button.

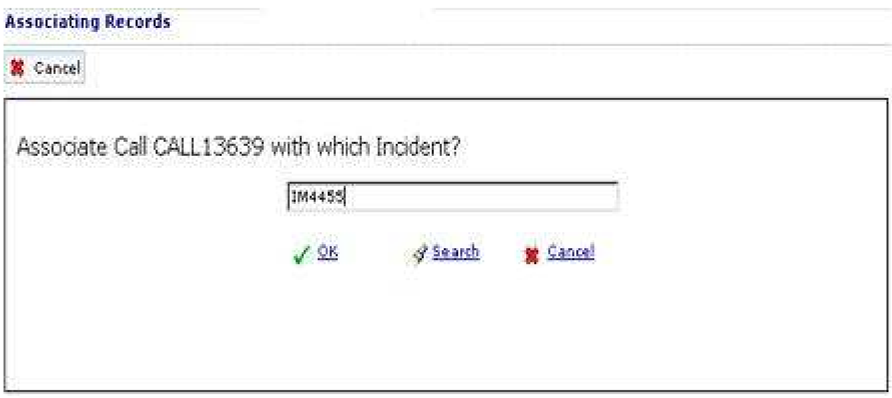


7. Next step click the **Detail** option icon.



8. Next follow the highlighted area to link a Call to a previously Opened incident.

9. Enter the prefix **IM** and the Incident number in the Text box (**IM4455**). Click **OK**.



10. A system-generated message indicating the call is associated with an incident will appear.

Note: ServiceCenter Tip –

To relate a Call with a previously opened ticket follow the > **Associate path**.

To view related tickets Calls or Incidents follow the > **View path.**

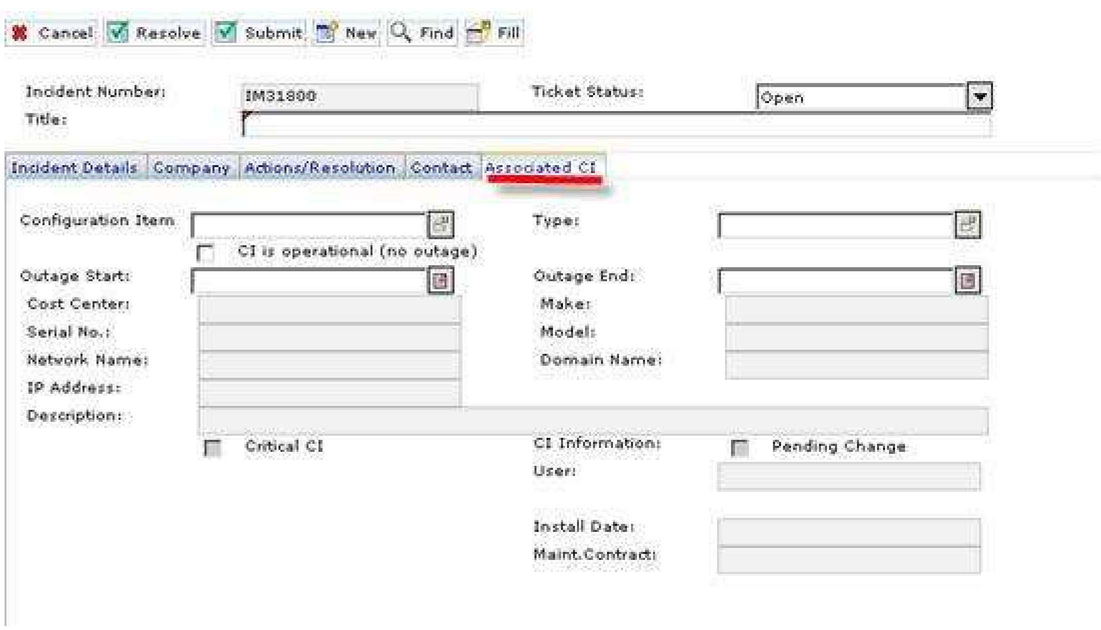
To relate a call to a new Incident ticket follow the **Related** > **Incidents** > **Open Path**.

Ticket #	C	I	Date	Status	Description
20019	C		12/25/06	suspended	Awaiting vendor support

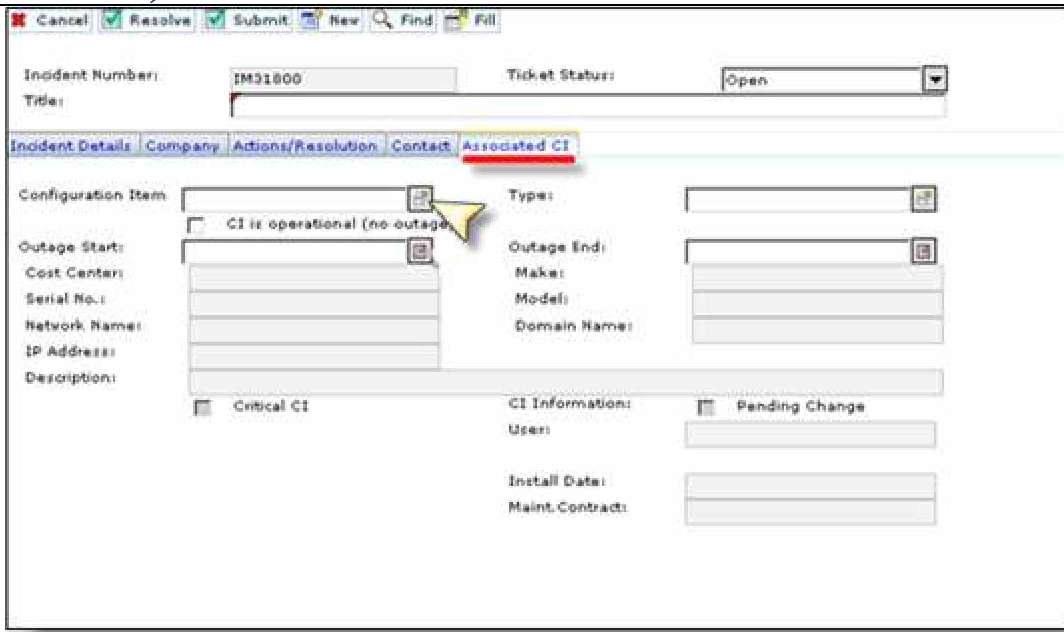
LESSON 11: HOW TO ASSOCIATE A CONFIGURATION ITEM (CI)

There are two ways to associate a configuration item in ServicCenter®. First there is the Associated CI tab when opening an incident.

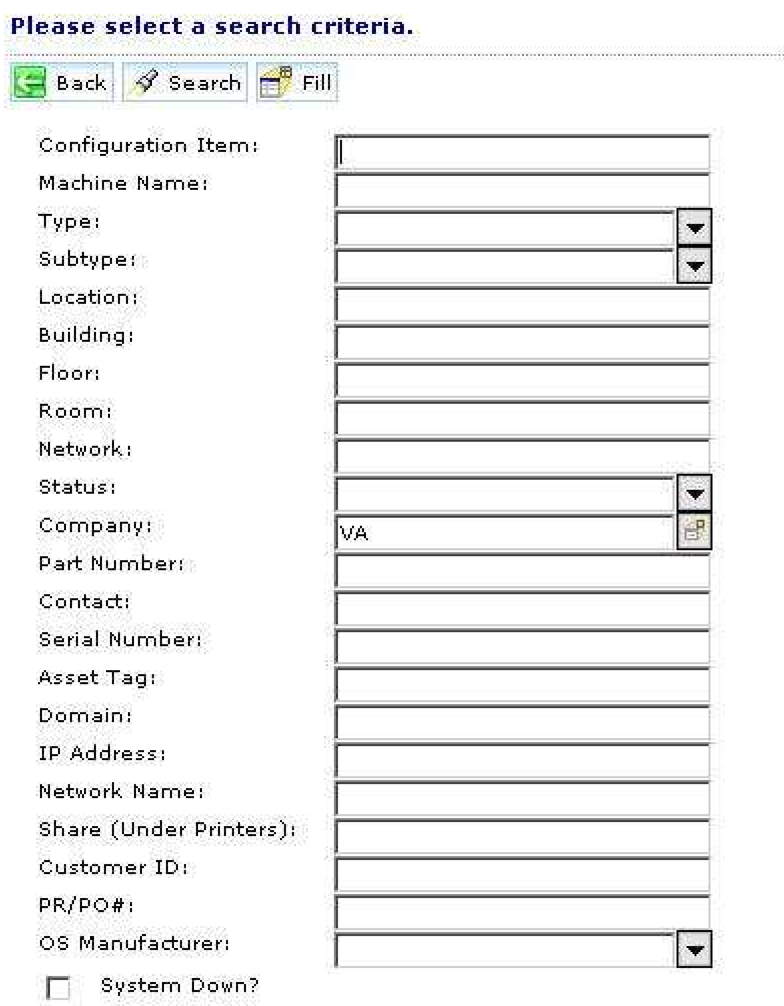
1. Click on the **Associated CI** tab. The following screen will appear.



2. Click on the fill form box to the right of the *Configuration Item* field/

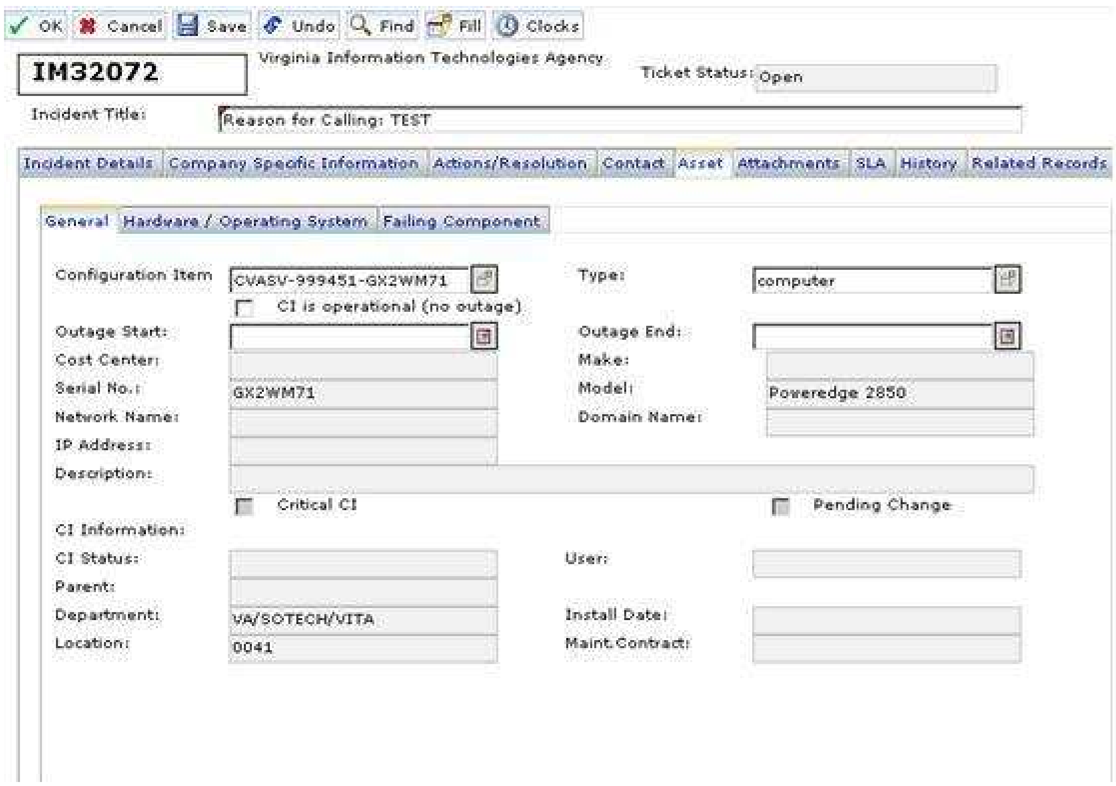


3. The following Search screen will appear.

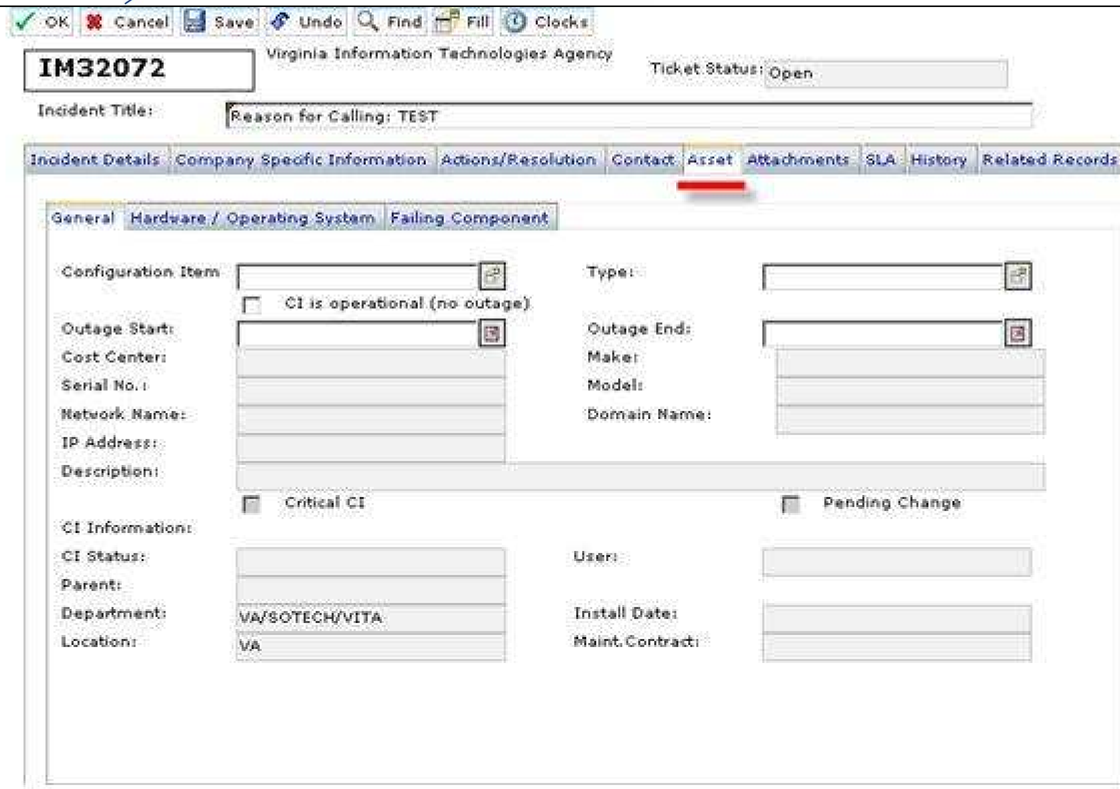


From this screen you can search the *Machine Name* and the *Serial* Number fields. Both fields require uppercase letters and to search using the *Serial Number* field you can enter any part of the number with a wild card, for example, *123, and it will find all assets with 123 in the serial number. The machine name is the short name for any server, router, or switch such as TRIDENT09.

4. Once the asset has been located in the database the following fill in Asset screen will appear.

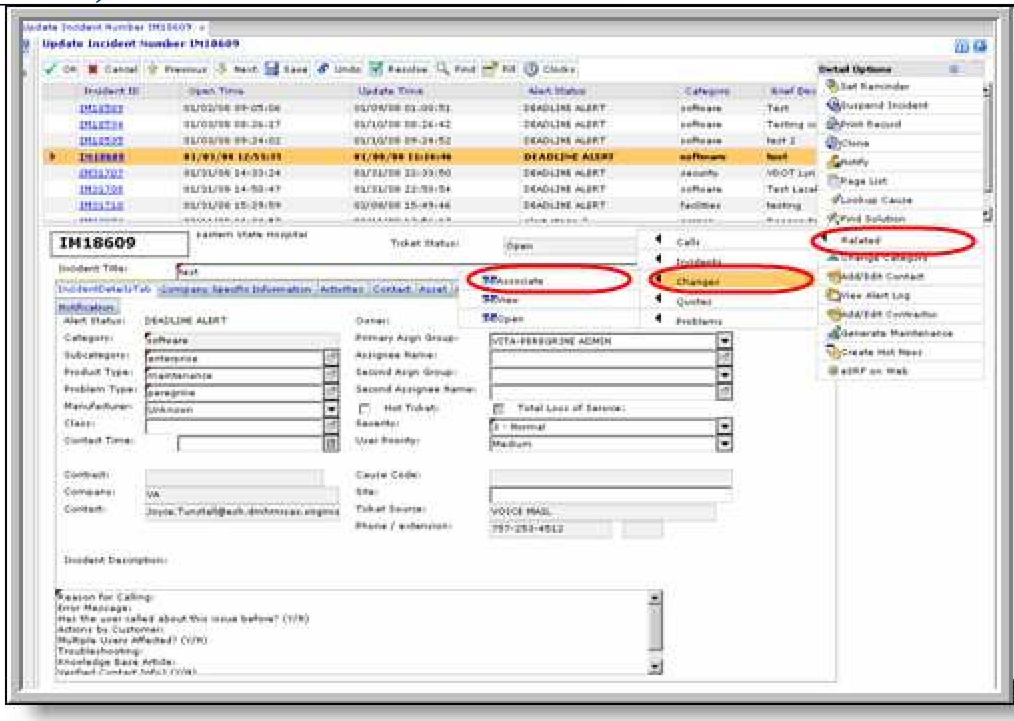


If an incident has already been created a CI can still be associated. Click on the **Asset** tab which will bring you to the same screen that appeared in **the Associated CI** tab. The remaining steps are the same as above.

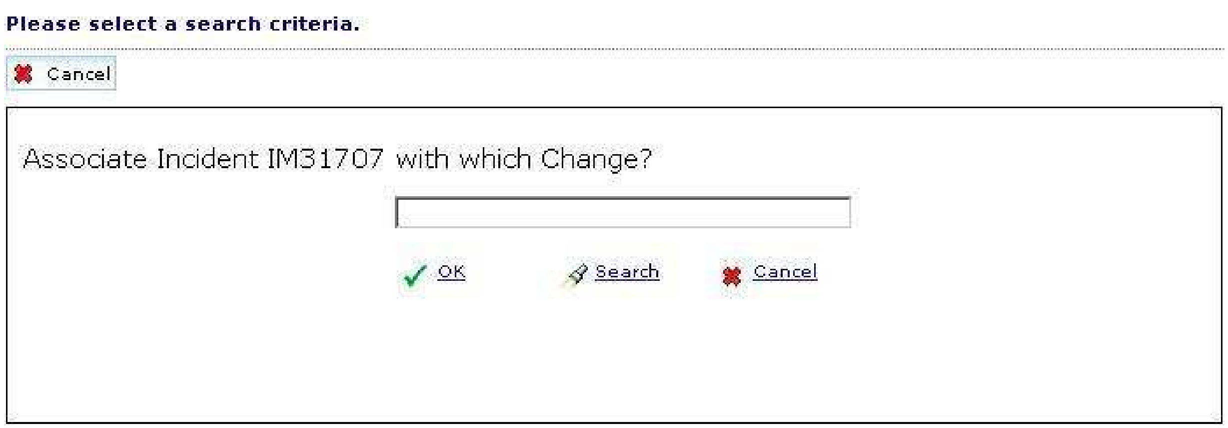


Lesson 12: How to Associate a change

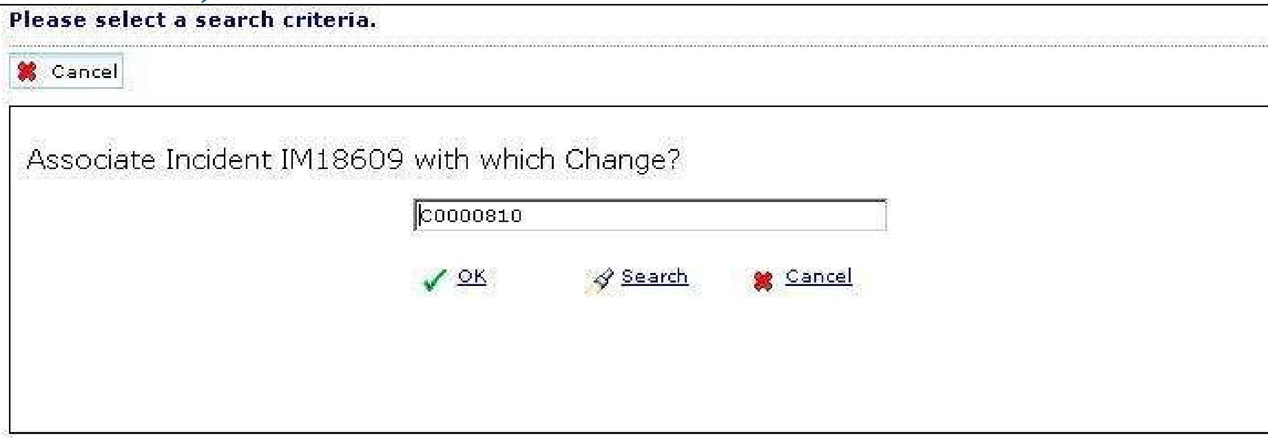
1. To associate an Incident with an existing Change, click on the **Details** icon in the top right corner of the incident queue. Then select **Related**, **Change**s, and **Associate**.



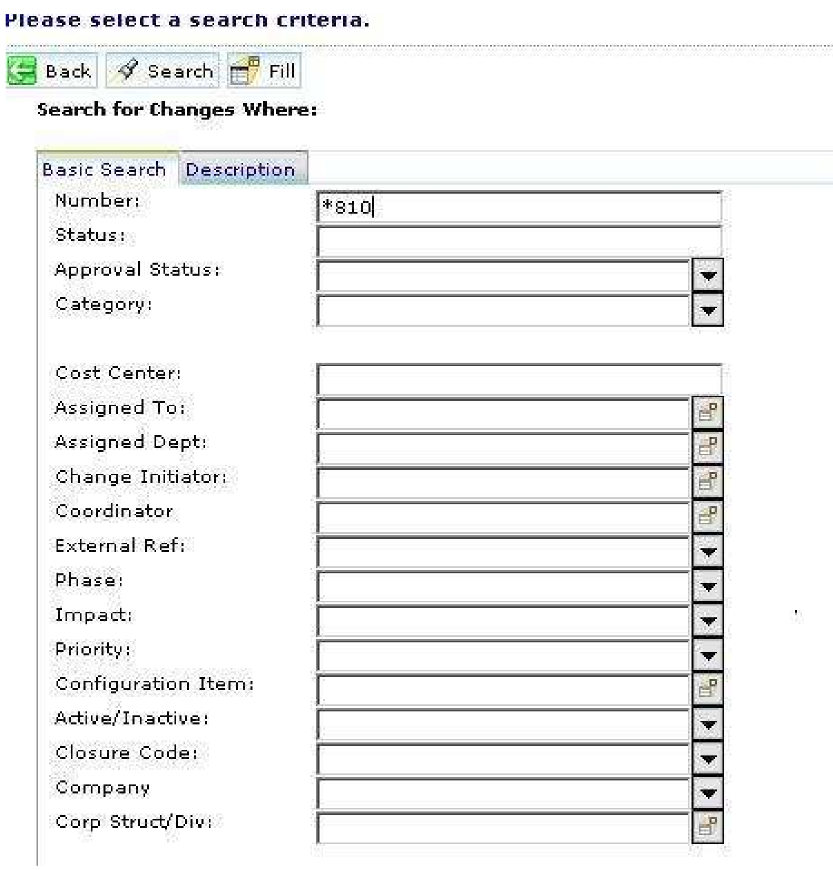
2. The following screen will appear requesting a Change number.



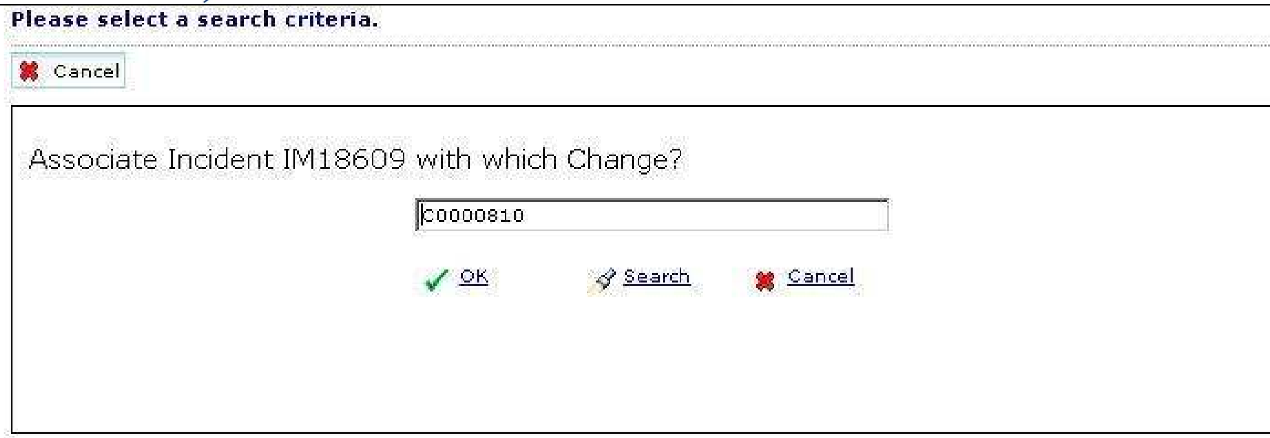
3. Enter the number of the Change that you want to associate the Incident to and click on either **OK** or **Search**.



4. If the Change number is not known, a search can be done by clicking on the **Search** button. The following Search screen will appear. A wild card can be used with any part of the Change number to search.



5. If, for example, ***810** is entered in the *Number* field as in the screen above, the system will fill in C000810 in the *Associate* screen.



6. Once OK is selected ServiceCenter will associate the Change with the Incident and the following message will be displayed.

Lesson 13: How to Run Ad Hoc Reports

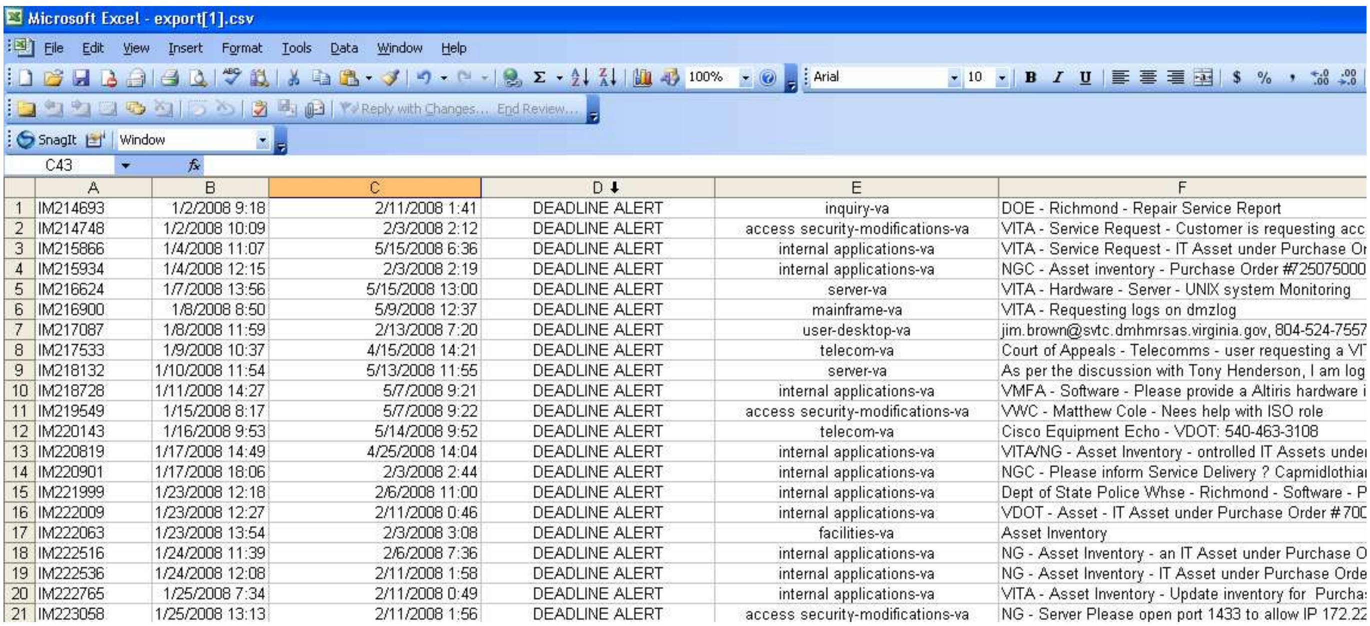
Open Date Range by Agency Report

This report query was filtered by a *specified range of dates* and the *agency name*.

1. Click the **View Work Queues** button.
2. Click the **Search** button.
3. Click the **Expand List** button.
4. Click the **Advanced Search** link
5. Enter the desired information into the **Opened After:** field, enter **01/02/08**.
6. Click the desired information into the **And Before:** field; enter **02/02/08.**
7. Click the **Search** button.
8. Click on the **List Options** icon.
9. Click the **Export to Text File** link.
10. Click the **Comma Separated Value (CSV)** option.
    Note: Click the **Export Column Header**
    Tab, Comma, Asterisk, Caret, and Other separates with the specific character selected.
11. Click the **OK** button.

12. Click the **Yes** button.
13. Click the **To help protect your security, Internet Explorer blocked this site** button.
14. Click the **Download File…** button.
15. If the Excel icon does not appear, you may have to repeat the process starting from the **Export to text file** procedure.
16. Click the List button.
17. Click the **Export to Text File** link.
18. Click the **Export Column Headers?** option.
19. Click the **OK** button
20. Click the **Yes** button
21. Click the **Open** button.

Below is an example of this report:



	A	B	C	D	E	F
1	IM214693	1/2/2008 9:18	2/11/2008 1:41	DEADLINE ALERT	inquiry-va	DOE - Richmond - Repair Service Report
2	IM214748	1/2/2008 10:09	2/3/2008 2:12	DEADLINE ALERT	access security-modifications-va	VITA - Service Request - Customer is requesting acc
3	IM215866	1/4/2008 11:07	5/15/2008 6:36	DEADLINE ALERT	internal applications-va	VITA - Service Request - IT Asset under Purchase Or
4	IM215934	1/4/2008 12:15	2/3/2008 2:19	DEADLINE ALERT	internal applications-va	NGC - Asset inventory - Purchase Order #725075000
5	IM216624	1/7/2008 13:56	5/15/2008 13:00	DEADLINE ALERT	server-va	VITA - Hardware - Server - UNIX system Monitoring
6	IM216900	1/8/2008 8:50	5/9/2008 12:37	DEADLINE ALERT	mainframe-va	VITA - Requesting logs on dmzlog
7	IM217087	1/8/2008 11:59	2/13/2008 7:20	DEADLINE ALERT	user-desktop-va	jim.brown@svtc.dmhmrsas.virginia.gov, 804-524-7557
8	IM217533	1/9/2008 10:37	4/15/2008 14:21	DEADLINE ALERT	telecom-va	Court of Appeals - Telecomms - user requesting a VI
9	IM218132	1/10/2008 11:54	5/13/2008 11:55	DEADLINE ALERT	server-va	As per the discussion with Tony Henderson, I am log
10	IM218728	1/11/2008 14:27	5/7/2008 9:21	DEADLINE ALERT	internal applications-va	VMFA - Software - Please provide a Altiris hardware i
11	IM219549	1/15/2008 8:17	5/7/2008 9:22	DEADLINE ALERT	access security-modifications-va	VWC - Matthew Cole - Nees help with ISO role
12	IM220143	1/16/2008 9:53	5/14/2008 9:52	DEADLINE ALERT	telecom-va	Cisco Equipment Echo - VDOT: 540-463-3108
13	IM220819	1/17/2008 14:49	4/25/2008 14:04	DEADLINE ALERT	internal applications-va	VITA/NG - Asset Inventory - ontrolled IT Assets under
14	IM220901	1/17/2008 18:06	2/3/2008 2:44	DEADLINE ALERT	internal applications-va	NGC - Please inform Service Delivery ? Capmidlothiar
15	IM221999	1/23/2008 12:18	2/6/2008 11:00	DEADLINE ALERT	internal applications-va	Dept of State Police Whse - Richmond - Software - P
16	IM222009	1/23/2008 12:27	2/11/2008 0:46	DEADLINE ALERT	internal applications-va	VDOT - Asset - IT Asset under Purchase Order #700
17	IM222063	1/23/2008 13:54	2/3/2008 3:08	DEADLINE ALERT	facilities-va	Asset Inventory
18	IM222516	1/24/2008 11:39	2/6/2008 7:36	DEADLINE ALERT	internal applications-va	NG - Asset Inventory - an IT Asset under Purchase O
19	IM222536	1/24/2008 12:08	2/11/2008 1:58	DEADLINE ALERT	internal applications-va	NG - Asset Inventory - IT Asset under Purchase Orde
20	IM222765	1/25/2008 7:34	2/11/2008 0:49	DEADLINE ALERT	internal applications-va	VITA - Asset Inventory - Update inventory for Purcha
21	IM223058	1/25/2008 13:13	2/11/2008 1:56	DEADLINE ALERT	access security-modifications-va	NG - Server Please open port 1433 to allow IP 172.22

ASSIGNEE & SEVERITY LEVEL REPORT

This report was filtered by the **assignee name** and **severity level**.

1. Click the **Search** button.
2. Click the **Either** option.
3. Enter the desired information into the **Assignee Name:** field. Enter harold **parker**.
4. Click the **Fill Form** button.
5. Click the **Either Primary or Secondary Assignee** and **Open or Closed** option.
6. Click the **Severity** button
7. Click the **2 – Urgent** list item.
8. Click the **Search** button.
9. Click the **List** button.
10. Click the **Export to Text File** link.
11. Click the **Export Column Headers?** option.
12. Click the **Comma Separated Value (CSV)** option.
13. Click the **OK** button.
14. Click the **Open** button.

15. If you would like to save the report to the desktop or folder follow this procedure:
    a. Click the **Worksheet Menu Bar** object
    b. Click the **File** object
    c. Enter the desired information into the Save As field. Enter **reports**
    d. Click the **Save As** object.

Below is an example of this particular report:

Incident ID	Open Time	Update Time	Alert Status	Category	Brief Description
IM10333	3/15/2007 12:23	3/20/2007 7:48	closed	access security-modifications-va	Customer getting max logon exceeded when logging into Peregrine.. kye.harding@vita.virginia.gov
IM10435	3/15/2007 18:12	3/20/2007 6:28	closed	access security-modifications-va	Customer called to report that she had to many sessions open and now cannot get in Peregrine.
IM13078	4/3/2007 10:51	4/3/2007 19:33	closed	access security-modifications-va	can general text be programmed into the password reset option in resolution code?example: "User's password has been reset." or something general like it? we do very many password resets and this would help streamline the ticket creating process.
IM23127	5/17/2007 16:52	5/22/2007 7:29	closed	access security-modifications-va	10. ITSM : Disable ITSM/Peregrine Account
IM24830	5/24/2007 20:28	5/27/2007 13:51	closed	access security-modifications-va	Roz has exceeded her signon logons and need to be reset. She needs to be reset as soon as possible. She is working by herself tonight.
IM262169	5/9/2008 11:56	5/17/2008 17:01	closed	server apps-va	VITA-CESC-PEREGRINE- Needs to have Doug Wilson Peregrine sessions killed for IM262097. Deborah needs this so she can update a CSA.
IM265341	5/16/2008 17:43	5/17/2008 1:09	resolved	access security-modifications-va	VITA - Access - His Peregrine account. Remove from DRS-DISTRICT 264 assignment queue
IM56381	8/31/2007 17:29	9/4/2007 13:54	closed	access security-modifications-va	"Disable access for R. B. Moore from all of your systems. Also, please forward any required paperwork to this employee's manager for final removal. Disable access for R. B. Moore from all of your systems. R. B. worked for Computer Services. His administrative manager is Bob Fraser. Also, please forward any required paperwork to this employee?s manager for final removal."
IM56382	8/31/2007 17:29	9/4/2007 13:55	closed	access security-modifications-va	Disable access for Peter Winthrop

Open Tickets by Assignment Group Report

This report query was filtered by the **ticket status** and **assignment group**.

Note: You can modify the columns in your ticket queue to include additional data.

To modify your columns got to the Peregrine All users' module on the VITA e-learning site (**http://www.vita.virginia.gov/ittraining/default.aspx?id=1349**), click on the **How to Modify Columns**.

1. Click the **View Work Queues** button.
2. Click the **Search** button.
3. Click the **CCC-HELPDESK PROF** list item from **Assignment Group**.
4. Click the **Either** option from the **Fix that is** field.

   Is this a Permanent or Temporary Fix, if unknown select Either?

5. Click the **Search** button.
6. Click the **List** button.
7. Click the **Export to Text File** link.
8. Click the **Export Column Headers?** option.

   Tab, Comma, Asterisk, Caret, and Other separates each column with the specific character selected.

9. Click the Comma Separated Value (CSV) option.
10. Click the OK button.
11. Click the Open button.
12. If you would like to save the report to the desktop or folder follow this procedure:

a. Click the **Worksheet Menu Bar** object.
b. Click the **File** object.
c. Click the **Save As** object.

Below is an example of this type of report:

Incident ID	Open Time	Update Time	Alert Status	Category	Brief Description
IM227937	2/8/2008 12:33	5/16/2008 9:51	DEADLINE ALERT	facilities-va	VITA - CESC - Hardware - Asset Inventory - Purchase Order # 7250002463 - Attn:JOE ANDREWS
IM258961	5/1/2008 15:17	5/16/2008 7:29	DEADLINE ALERT	access security-modifications-va	SERVICE REQUEST: MRC - SHARED EMAIL - new accounts request
IM259245	5/2/2008 9:11	5/16/2008 8:54	DEADLINE ALERT	internal applications-va	Asset - IT Asset under Purchase Order # 7000053110
IM260672	5/6/2008 12:37	5/17/2008 7:37	DEADLINE ALERT	user-desktop-va	VITA - Hardware -: VITA program laptops redeployed and set up for the following staff at CESC
IM262313	5/9/2008 15:13	5/13/2008 16:31	updated	audio-video teleconferencing-va	DOE - New Audio and Video Conferencing - questions on Webex break out calls
IM262644	5/12/2008 10:24	5/18/2008 15:00	updated	access security-modifications-va	SERVICE REQUEST: SCHEV - SHARED EMAIL - New account request for Beverly Covington
IM262926	5/12/2008 14:41	5/18/2008 15:00	updated	user-desktop-va	WWRC - please add the VCCC email address to the Gal
IM264224	5/14/2008 15:19	5/18/2008 15:03	updated	access security-modifications-va	Reason for emailing: NGC - Access - Access to shared folder
IM264239	5/14/2008 15:44	5/18/2008 15:03	updated	user-desktop-va	Reason for emailing: DJJ - Phone Jack - the telephone disconnects. Please check the journal for the template.
IM264318	5/14/2008 22:14	5/14/2008 22:14	open	server-va	Reason for emailing: The S/N for the tape libary is 3G42KYK32E02. It is an HP MSL5026-S2 SDLT Tape Library.
IM264737	5/15/2008 14:22	5/16/2008 7:28	updated	access security-modifications-va	EDR - Software - Distro list problems
IM264798	5/15/2008 15:30	5/18/2008 15:04	updated	access security-modifications-va	Reason for emailing: NGC - Local admin account
IM264802	5/15/2008 15:37	5/15/2008 15:57	updated	user-desktop-va	VITA - CESC - customer needs Altiris insalled on his computer.
IM264830	5/15/2008 16:47	5/16/2008 9:08	updated	access security-modifications-va	VDOT - ServiceCenter -:Remove Susan Edwards from LAC263 Tidewater team.
IM264846	5/15/2008 21:02	5/16/2008 7:01	updated	server-va	Reason for emailing: VITA - Please open 5 tickets for Hardware Failures at DMV
IM264847	5/15/2008 21:05	5/16/2008 7:06	updated	server-va	Reason for emailing: VITA - Please open 5 tickets for Hardware Failures at DMV
IM264848	5/15/2008 21:08	5/16/2008 7:08	updated	server-va	Reason for emailing:VITA - Subject: Please open 5 tickets for Hardware Failures at DMV
IM264849	5/15/2008 21:10	5/16/2008 7:10	updated	server-va	Reason for emailing: VITA - Please open 5 tickets for Hardware Failures at DMV
IM264850	5/15/2008 21:13	5/16/2008 7:12	updated	server-va	Reason for emailing: VITA - Please open 5 tickets for Hardware Failures at DMV

Severity Ticket Report

This report query was filtered by the ticket **severity level** and **date range**.

1. Click the **View Work Queues** button.
2. Click the **Search** button.
3. Click the **Expand List** button.
4. Click the **1 – Critical** list item.
5. Leave the default option, **Open**, for **Tickets that are** field.
6. Click the **Either** option for **Fix that is**.

   Is this a Permanent or Temporary Fix, if unknown select either?

7. Click the **Advanced Search** link.
8. Enter the desired information into the **Opened After:** field. Enter **05/01/08**.
9. Enter the desired information into the **And Before:** field. Enter **05/18/08**.
10. Click the **Search** button.
11. Click the **List** button.
12. Click **Export to Text File** link.
13. Click the **Comma Separated Value (CSV)** option.
14. Click the **Export Column Headers?** option
15. Click the **OK** button.
16. Click the **Open** button.

Below is an example of this report.

Incident ID	Open Time	Update Time	Alert Status	Category	Brief Description
IM262097	5/9/2008 10:57	5/18/2008 17:46	DEADLINE ALERT	network-va	ABC Store 260 Falls Church - Circuit Number: 042575 - circuit is bouncing up and down and affecting credit card processing. pinging dsl box returns replies and timeouts
IM265112	5/16/2008 11:54	5/16/2008 19:24	updated	network-va	NOC/HPOV/MPLS VDH-104 Southampton Cir#BCBJRFWV0001 26022 Administration Center Drive Courtland VA 23837 Linda Sutton 757-686-4976 9am-5pm 3/10/2008 Node Down: vdh-104-swi-1.cov.virginia.gov Root Cause: vdh-104-swi-1.cov.virginia.gov Reported by ccesov01.cov.virginia.gov
IM265113	5/16/2008 11:54	5/16/2008 12:40	alert stage 3	network-va	Interface lan0 is Down. Root Cause: vdh-104-swi-1.cov.virginia.gov lan0 Reported by ccesov01.cov.virginia.gov
IM265133	5/16/2008 12:27	5/16/2008 18:30	updated	network-va	DMV - Circuit - MGBH9B7L0001 - Circuit down.
IM265144	5/16/2008 12:35	5/16/2008 19:24	updated	network-va	NOC/HPOV/MPLS ABC-105 #325 Cir# BCBJLL0B0001 Courtland22718 Main StreetCourtlandVA23837MR5Jennifer Justice757-653-207410am-9pm9/27/2007 Node Down 10.164.0.105
IM265180	5/16/2008 13:16	5/16/2008 19:26	updated	network-va	NOC/HPOV/MPLS DOT-077 Cluster Spring AHQ Cir#BCBJPNGF00011024 Cherry Hill TrailSouth BostonVA24592STeddy Holt434-572-36009am-5pm2/7/2008Node Down: dot-077-rtr-1.cov.virginia.gov Root Cause: dot-077-rtr-1.cov.virginia.gov Reported by ccesov01.cov.virginia.gov
IM265252	5/16/2008 14:53	5/16/2008 19:28	updated	network-va	NOC/HPOV/MPLS VDH-067 Surry County Cir #BCBJPXDJ0001 474 Colonial Trlail WestDendronVA23883SMark Summers 804.863.1652x89559am-5pm2/29/2008 Node Down: vdh-067-rtr-1.cov.virginia.gov Root Cause: vdh-067-rtr-1.cov.virginia.gov Reported by ccesov01.cov.virginia.gov
IM265293	5/16/2008 15:41	5/16/2008 23:11	updated	network-va	NOC/HPOV/MPLS ABC-106 Arlington BVD Fairfax Cir#BCBJLL3C0001 7263-B Arlington BoulevardFairfaxVA22042MR5Lodato703-207-737210am-9pm9/26/2007 Node Down abc-106-rtr-1.cov.virginia.gov Root Cause: abc-106-rtr-1.cov.virginia.gov <$10>
IM265343	5/16/2008 18:05	5/16/2008 18:49	updated	network-va	NOC/HPOV/MPLS Flood of interface down alerts on OVOU browser. Interface lan0 is Down. Root Cause: vdh-029-swi-1.cov.virginia.gov lan0 Reported by ccesov01.cov.virginia.gov

Closed Ticket Report

This report query was filtered by the ticket status and the assignment group.

Note: You can modify the columns in your ticket queue to include additional data.

To modify your columns, go to the **Peregrine All Users** module on the VITA e-learning site (**http://www.vita.virginia.gov/ittraining/default.aspx?id=1349**), click on the **How to Modify Columns**.

Click on the **View Work Queues** button.

1. Click the **Search** button.
2. Click the **Closed** option.
3. From the **Assignment** field select the **CCC-HELPDESK PROG** list item.
4. Click the **Advanced Search** link.
5. Enter the desired information into the **Opened After:** field. Enter **05/01/08**.
6. Enter the desired information into the **And Before:** field. Enter **05/18/08**.
7. Click the **Search** button.
8. Click the **List** button.
9. Click the **Export to Text File** link.
10. Click the **Comma Separated Value (CSV)** option.
11. Click the **Export Column Headers?** option
12. Click the **OK** button.
13. Click the **Open** button.

An example of this report can be seen below:

Incident ID	Open Time	Update Time	Alert Status	Category	Brief Description
IM258550	5/1/2008 2:33	5/13/2008 17:00	closed	mainframe-va	PFM39I file cycle conflict
IM258727	5/1/2008 10:15	5/1/2008 10:16	closed	telecom-va	VDOT - OUTLOOK -:CSC ead only rights to her outlook calendar
IM258766	5/1/2008 10:44	5/1/2008 10:56	closed	access security-modifications-va	Brief Description: Agency - City - Access - COV - Shared Email - User account could not have the password reset -denied access Renee Brown
IM258820	5/1/2008 11:39	5/9/2008 17:00	closed	user-desktop-va	VITA - FAX machine - Fax machine in room 1406B within the CMOC
IM258842	5/1/2008 12:10	5/2/2008 13:51	closed	inquiry-va	Reason for Calling:
IM258852	5/1/2008 12:27	5/1/2008 15:35	closed	access security-modifications-va	DJJ - Access - user needs her network password reset - user id: cdhughes
IM258892	5/1/2008 13:47	5/1/2008 15:36	closed	access security-modifications-va	DJJ - Access -:Password reset for computer access
IM258904	5/1/2008 14:07	5/1/2008 15:37	closed	access security-modifications-va	DJJ - Access - user can not get access to the internet because his account is locked. User can be reached at 540-574-6133.
IM258916	5/1/2008 14:41	5/2/2008 13:50	closed	access security-modifications-va	VDH - Access - Shared Email - Can Not Log In
IM259033	5/1/2008 15:51	5/9/2008 17:00	closed	user-desktop-va	Brief Description:DSS - Access - COV - Shared Email
IM259067	5/1/2008 16:20	5/1/2008 16:26	closed	network-va	DJJ - Access - user's VPN account is locked
IM259308	5/2/2008 10:19	5/2/2008 10:39	closed	access security-modifications-va	DJJ - Login -:The cusotmer is locked out of Windows
IM259354	5/2/2008 11:14	5/13/2008 17:00	closed	inquiry-va	CSA - VITA - CESC - Unable to call certain toll free numbers.
IM259455	5/2/2008 13:46	5/2/2008 13:52	closed	access security-modifications-va	DJJ - Account -: Domain Account is locked
IM259487	5/2/2008 14:22	5/10/2008 17:01	closed	network-va	VDOT - Messaging - IronPort
IM259521	5/2/2008 14:52	5/2/2008 15:02	closed	access security-modifications-va	DJJ - Access - User cannot access his computer - User ID [lynskejc]
IM259532	5/2/2008 15:10	5/2/2008 15:17	closed	access security-modifications-va	DJJ - Login -:Account unlock.
IM259561	5/2/2008 15:48	5/13/2008 15:32	closed	inquiry-va	VDOT - Human Resources - User needs copy of W-2 Form from 2004
IM259578	5/2/2008 16:05	5/13/2008 17:00	closed	server-va	JYF - Dell power edge 2800 Server BCJ5561 the Harddrive has failed Server name cscjsssvr M3634 vita ng server #100250534
IM259664	5/4/2008 10:12	5/4/2008 10:36	closed	access security-modifications-va	Agency: VITA : Chester/CESC Problem: Peregrine issues when accessing tickets in queues/Peregrine - Throw user out back to start screen.
IM259690	5/5/2008 6:05	5/7/2008 5:58	closed	network-va	VDOT - EMAIL -: Email - Ironport problems
IM259713	5/5/2008 8:10	5/5/2008 8:59	closed	access security-modifications-va	Brief Description: DJJ - Access - DJJ ? Unable to log in

Contact Name Ticket Report

This report query was filtered by the ticket **contact name** and **date range**. The **contact name** will normally be the **caller or email sender**.

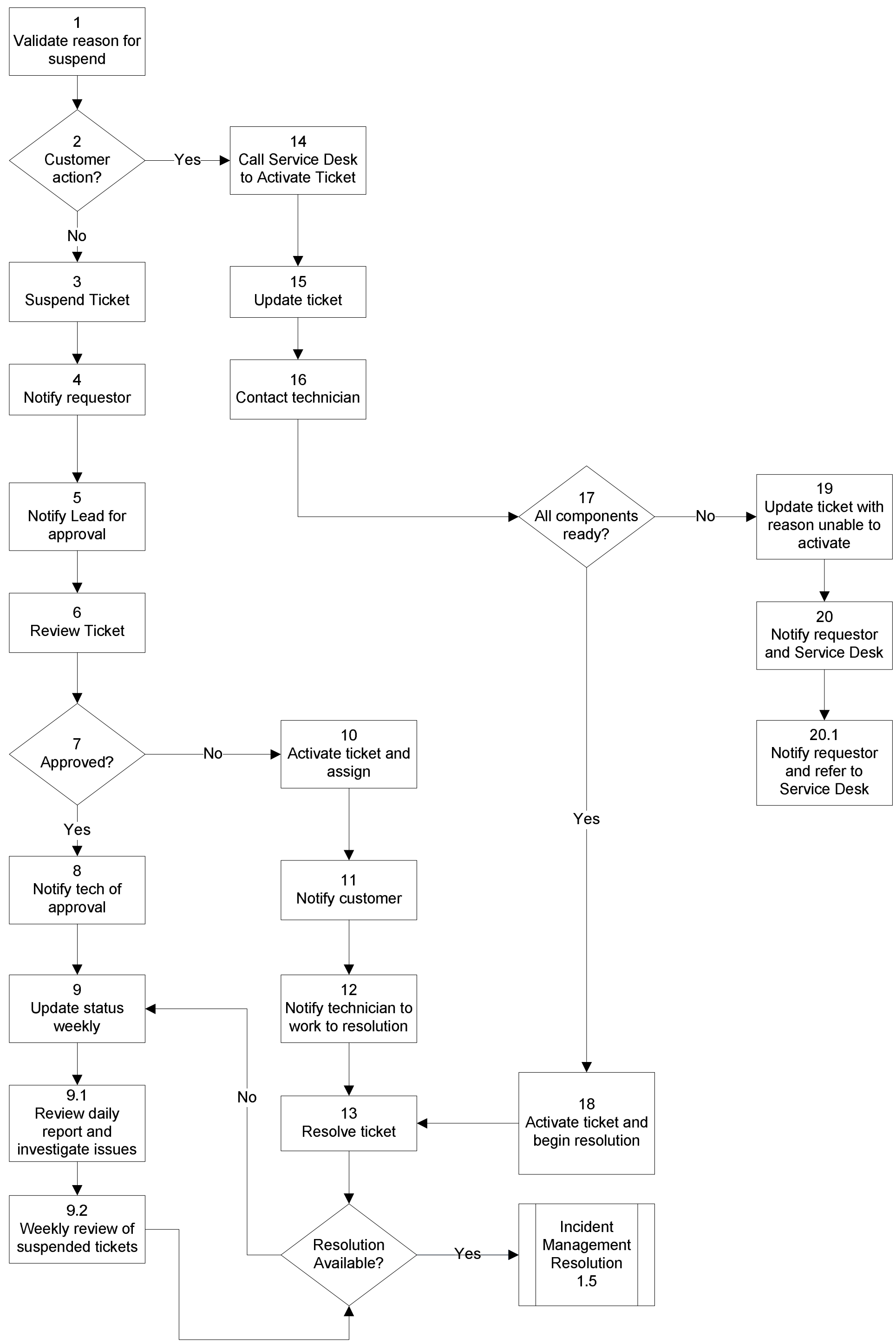
1. Click the **View Work Queues** button.
2. Click the **Search** button.
3. Click the **Either** option for **Ticket that is** field.
4. Enter the desired information into the **Contact Name:** field. Enter jacquelin.
5. Click the **Fill Form** button.
6. Click the **jacquelin.olbert@ngc.com** link.
7. Click the **Advanced Search** link.
8. Enter the desired information into the **Opened After:** field. Enter **01/02/08**.
9. Enter the desired information into the **And Before:** field. Enter **05/18/08**.
10. Click the **Search** button.
11. Click the **List** button.
12. Click the **Export to Text File** link.
13. Click the **Comma Separated Value (CSV)** option.
14. Click the **Export Column Headers?** option.
15. Click the **OK** button.
16. Click the **Open** button.

An example of this report can be seen below:

Incident ID	Open Time	Update Time	Alert Status	Category	Brief Description
IM235836	3/3/2008 13:54	3/9/2008 1:55	closed	access security-modifications-va	NGC - Access - have a forwarding statement put in Jacqueline Olbert's DITLAN email profile. I need to have my DITLAN email forwarded to jacquelin.olbert@ngc.com.
IM250620	4/10/2008 12:25	4/24/2008 17:00	closed	access security-modifications-va	service Request : for 8 DITLAN accounts
IM255580	4/23/2008 12:09	5/1/2008 17:01	closed	access security-modifications-va	NG - Peregrine -: Norm Williamson access to ServiceCenter
IM257898	4/29/2008 15:52	5/7/2008 17:00	closed	access security-modifications-va	NG - Access - have Dave Duegaw removed from the NG-Configuration Managers queue in ServiceCenter
IM258075	4/30/2008 8:56	5/9/2008 17:00	closed	access security-modifications-va	VITA - Access - Openview

IM260640	5/6/2008 11:56	5/14/2008 17:00	closed	access security-modifications-va	NG - Access - allow Pam Matthews to access the ServiceCenter database for reporting purposes
IM264207	5/14/2008 15:00	5/15/2008 16:40	updated	server-va	VITA - Remote Access - Grant Remote Access Rights

SERVICE DESK SUSPEND INCIDENT PROCEDURE FLOW



Service Desk Suspend Incident Procedure Business Rules	
Triggers	*ITSM-IM-1.8 Incident Management Incident Ownership, Monitoring, and Tracking Procedure*
Inputs	One of the approved reasons for suspending an Incident ticket occurs
Outputs	Continue *ITSM-IM-1.4 Incident Management Incident Investigation and Diagnosis Procedure* and *ITSM-IM-1.6 Incident Management Incident Restoration Procedure*, and *ITSM-IM-1.8 Incident Management Incident Ownership, Monitoring, and Tracking Procedure*
General Comments	

SERVICE DESK SUSPEND INCIDENT PROCEDURE NARRATIVE

Step	Responsible Role	Action
1	Technician	Verify that a valid reason for suspension occurred. The reasons for suspension are listed in Appendix 1 – Approved Suspend Reasons:
2	Technician	• If the nature of the suspension is not based on a customer action, go to step 3. • If it is based on a customer action, go to step 14.
3	Technician	Place the ticket in suspend status. The SLA clock stops until the ticket is reactivated.
4	Peregrine(Automated System)	Notify the requester by email that the ticket has been suspended.
5	Technician	Notify the Team Lead/Queue Manager by phone or email that the ticket has been suspended.
6	Team Lead/ Queue Manager	Review the suspension of the ticket.
7	Team Lead/ Queue Manager	• If the suspension is approved, go to step 8. • If the suspense is not approved, go to step 10.
8	Team Lead/ Queue Manager	Respond to the technician by phone or email so that the approval can be noted when the technician updates the ticket status.
9	Technician/Peregrine (Automated System)	Update the status on suspended tickets weekly until the issue is ready for resolution. **Note:** Notify the customer each time the ticket has been updated and give status via voicemail and email.
9.1	Team Lead/ Queue Manager	• Review the suspended tickets in the queue daily. • Investigate apparent unwarranted delays in resolution.
9.2	Area Manager	Conduct full review of the queue's suspended tickets weekly with the Team Leads/Queue Managers.
10	Team Lead/ Queue Manager	If the reason for suspension is invalid, Activate the ticket and assign it to an individual technician for resolution.

Service Desk Suspend Incident Procedure Narrative

Step	Responsible Role	Action
11	ServiceCenter (Automated System)	Notify the requester by email that the ticket has been taken out of suspense.
12	Team Lead/ Queue Manager	Notify the technician that the ticket suspense was not approved.
13	Technician	Resolve the ticket. Refer to *Incident Management Incident Resolution Procedure*. End procedure.
14	Requestor	If the nature of the suspension is based on a customer action or when the condition that caused the suspension has cleared, call the Service Desk to Activate the ticket.
15	Service Desk Analyst	Note the requestor's Activation request in the ticket.
16	Service Desk Analyst	Contact the assigned Technician (ticket assignee) to inform them of the request to activate the ticket. **Note:** If escalation or inactivity on the ticket warrants activating the ticket immediately, remove the individual Assignee from the ticket and activate it for follow up by the Queue Manager in addition to contacting the Technician.
17	Technician	Determine if all information, hardware, and software is available to complete the request. • If yes, go to step 18. • If no, go to step 19.
18	Technician	Activate the ticket and begin ticket resolution activity. Go to step 13 when done.
19	Technician	Enter the reason that the ticket has not been taken out of suspend mode in the ticket.
20	Technician	Notify the requester and the Service Desk Analyst that the ticket is still suspended and why.
20.1	Manager/Technician	• Contact the Requesters to notify them that their tickets have been closed. • When the customer is ready to proceed a ticket may be cloned by contacting the Service Desk with the original ticket number.

SERVICE DESK SUSPEND INCIDENT PROCEDURE NARRATIVE		
Step	**Responsible Role**	**Action**
21	Resolution Available?	Resolution achieved? • If yes, continue with Incident Management step 1.5 • If no, go to step 9

APPENDIX 1 – FORMS, TEMPLATES

Reason for Suspension	Description
Unable to locate customer and/or equipment	• In order for the customer to be unavailable: – The technician must attempt to reach the requestor by phone (office, cell, and alternate number provided in ticket) and leave a voicemail message. – The technician must attempt to reach the alternate contact by phone and leave a voicemail message. – The technician must attempt a follow-up with an email. – The elapsed time must meet the requirements in the *Suspend Time* table. • If equipment is unavailable, it must be a customer-driven situation. For example, a Suspend can not be because the Service Provider has misplaced the equipment.
Loaner unit in place	The requestor has been provided with a loaner unit, which is fully functional and an acceptable workaround for the customer.
Customer on termination/transfer status	Pertains to account management functions that cause an account to be: • Disabled but not yet removed. • Entered before an account transfer can occur without impact to the customer's access.
Need customer to supply more information	Customer needs to provide a license, support contact, configuration specification, etc.
Customer deferred to a later time	Technician is ready to provide services but customer has requested work be performed later. Incident should be CLOSED and re-opened at a later date when the customer has availability.
Awaiting PMO input	A VITA SMO response to a question or approval is required.
Remote Assistance Not Allowed by the Commonwealth	The Service Provider model is based on use of Remote Assistance. When Remote Assistance is not allowed, the Service Level Agreement clock may be stopped.
Natural disaster	A natural disaster has occurred. The VITA SMO and NG will have agreed to the use of this category.

Relationships to Other Documents

Document Name	Relationship
xxx-xx-xxxxx Glossary	Terms and Definitions
Incident Management Detection and Recording Procedure	Procedure
Incident Management Classification Procedure	Procedure
Incident Management Incident Closure Procedure	Procedure
Incident Management Incident Restoration	Procedure
Incident Management Initial Support Procedure	Procedure
Service Desk Receive Incident Report or Service Request Procedure	Procedure
Service Desk Call Handling Procedure	Procedure
Service Desk Email Request Handling Procedure	Procedure
Service Desk Close Incident or Service Request Procedure	Procedure
Service Desk Manage User Escalation Request Procedure	Procedure
Service Desk Management Escalation Procedure	Procedure
Service Desk Open Master or Subordinate Ticket Procedure	Procedure
Service Desk Analyst Escalation of a Severity 1 or 2 Incident Procedure	Procedure
Service Desk Executive Support Procedure	Procedure
Incident Management Process	Processes
Service Desk Outage Coordination Process	Processes
Service Desk Ticket Quality Policy	Policies