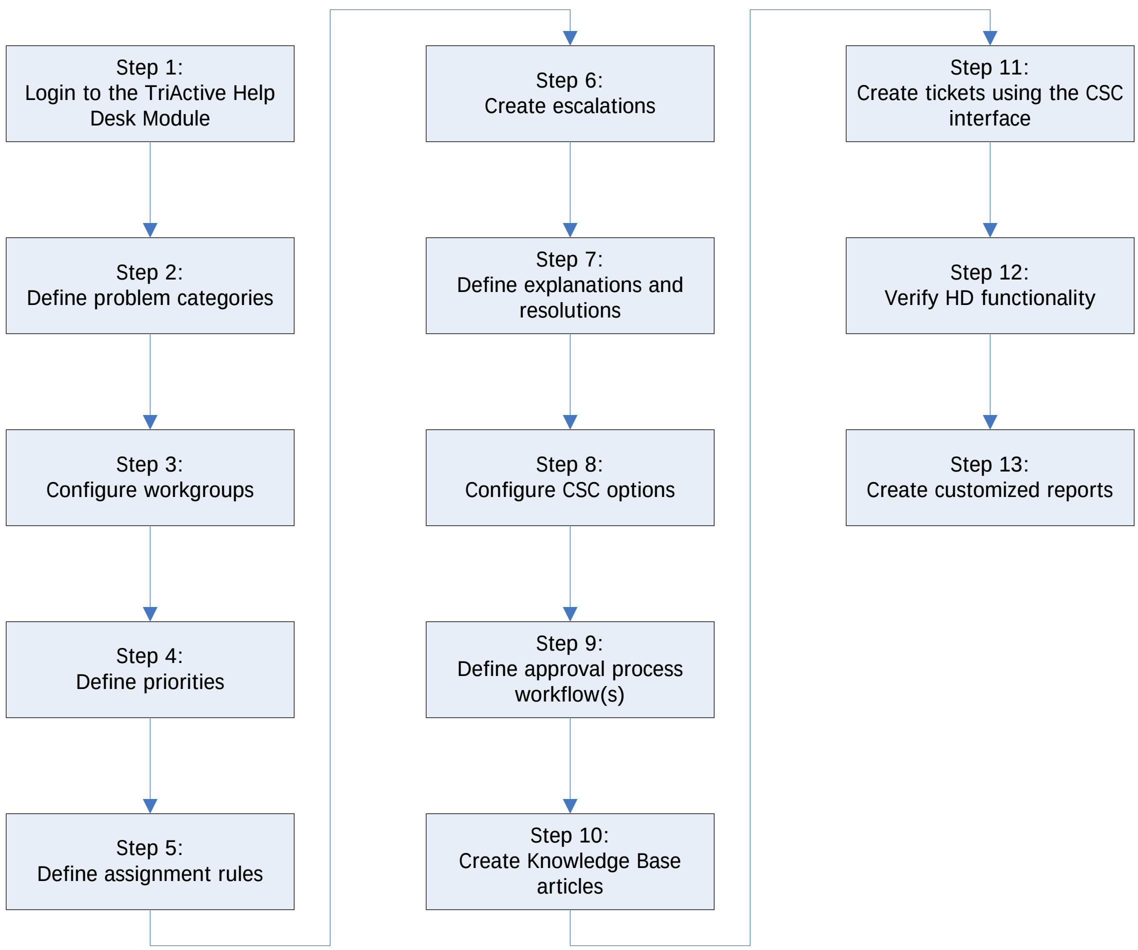
SystemsManagement Ondemand™
by TriActive

Self-paced Training Guide

Help Desk

TriActive Help Desk Scenario Workflow

Objective: This scenario document is designed to provide a logical workflow that demonstrates all of the features and functionality within the TriActive Help Desk solution. This is not intended to replace the in-depth technical information contained or shown in the Admin and User guides or training videos, but is intended for someone with a technical background to easily navigate through the entire solution at their own pace. Below is the logical workflow diagram and on subsequent pages are more details about each step in the diagram. Depending on your efficiency with Systems Management solutions, this exercise can be completed in approximately 25 minutes.



TriActive Help Desk Scenario Details

1 Login to the TriActive Help Desk Module
   a Open a browser and login into the ***TriActive Systems Management On Demand™*** Portal.
   b Click on the **Help Desk** tab.

2 Define problem categories
   a Click on the **Admin** tab, and then click the **Help Desk** sub tab.
   b Click on **Categories**.
   c Click **Create.**
   d Enter "IT Request" in the **Name** field.
   e Click **Create.**
   f Click **Create** again.
   g Enter "Burn CD(s)" in the **Name** field.
   h Select the **Subcategory of** checkbox.
   i Select **IT Request** from the dropdown box.
   j Click **Create.**

3 Configure workgroups
   a Click **Workgroups.**
   b Click **Create**.
   c Enter "Help Desk" for the **Name** field.
   d Choose **Specialists** and click **Add**.

4 Define priorities
   a Click **Priorities**.
   b Create a level **5** priority called "Future Task".
   c Click **Save**.

5 Define assignment rules
   a Click **Assignment Rules**.
   b Click **Create**.
   c Skip section 1.
   d In section 2, select **Email** as the Level 1 category.
   e In section 3, select the **Help Desk** workgroup created in step 3.
   f Click **Create**.

6 Create escalations
   a Click **Escalation Rules**.
   b Click **Create**.
   c Select **2 – High** from the **Priority** dropdown box.
   d Select **Default 24/7/365** from the **Service Calendar** dropdown box.
   e Select the **Elevate the ticket's priority after this escalation rule has been fully executed** checkbox.
   f Enter **20** and select **Minute(s)** from the dropdown.
   g Select the **Send an escalation e-mail notice to the following address** checkbox.
   h Enter your email address in the email field (e.g. name@domain.com).
   i Select the **Enable 2nd escalation** checkbox.
   j Enter **20** and select **Minute(s)** from the dropdown.
   k Select the **Send an escalation e-mail notice to the following address** checkbox.

- l Enter your email address in the email field.
- m Click **Create**.
- n Select **1 – Critical** from the **Priority** dropdown box.
- o Select **Default 24/7/365** from the **Service Calendar** dropdown box.
- p Select the **Elevate the ticket's priority after this escalation rule has been fully executed** checkbox.
- q Enter **20** and select **Minute(s)** from the dropdown.
- r Select the **Send an escalation e-mail notice to the following address** checkbox.
- s Enter your email address in the email field (e.g. name@domain.com).
- t Click **Create**.

7 Define explanations and resolutions
- a Click **Explanations**.
- b Click **Create**.
- c Enter "Waiting for Purchase" in the **Explanation** field.
- d Click **Create**.
- e Click **Create**.
- f Enter "Waiting for Callback" in the **Explanation** field.
- g Click **Create**.
- h Click **Resolutions**.
- i Click **Create**.
- j Enter "End User Trained" in the **Resolution** field.
- k Click **Create**.
- l Click **Create**.
- m Enter "Software Installed" in the **Resolution** field.
- n Click **Create**.

8 Configure Customer Service Center (CSC) options
- a Click on the **Admin** tab, and then click the **General** sub tab.
- b Click on **Customer Service Center**.
- c Under **Problem Ticket Settings**, select all checkboxes.
- d Click **Save**.

9 Define approval process workflow(s)
- a Click on the **Admin** tab, and then click the **Help Desk** sub tab.
- b Click on **Definitions** under **Approval Workflow Process**.
- c Click **Create**.
- d Enter "Burn Data to CD" in the **Name** field.
- e Select the **Notify on State Change** checkbox and select your specialist account from the **Send Notification to** dropdown box.
- f Select **IT Request** from the **Category (level 1)** dropdown box.
- g Select **Burn CD(s)** from the **Category (level 2)** dropdown box.
- h Click **Add**.
- i Enter "Check IT Request" in the **Name** field.
- j Enter your email address in the **Recipients** field (e.g. name@domain.com).
- k Enter "Please verify the value of this request" in the **Message** field.
- l Click **Save**.

10 Create a Knowledge Base article
- a Click on the **Admin** tab, and then click the **Knowledge Base** sub tab.

- b Click on **Articles**.
- c Click **Create**.
- d Select **FAQ** from the **Article Type** dropdown box.
- e Select **Email** from the **Category (level 1)** dropdown box.
- f Select the **Activate this article** checkbox.
- g Enter "Email Attachments" in the **Subject** field.
- h Enter "Email Attachments" in the **Keyword(s)** field.
- i Enter "Email Attachments test" in the **Description** field.
- j Click **Save**.

11 Create Help Desk problem tickets using the CSC interface.
- a On your PC's desktop, locate the TriActive icon in your system tray.
- b Double-click the TriActive icon to display the TriActive CSC interface.
- c Enter your **First Name**, **Last Name**, and **E-Mail** address.
- d Click **Login**.
- e Select **Email** from the **Category (level 1)** dropdown box.
- f Select **2 – High** from the **Priority** dropdown box.
- g Enter "email attachment issue (test 1)" in the **Subject** and **Description** fields.
- h Select the **Include an attachment** checkbox.
- i Enter "file attempting to attach" in the **Attachment Description** field.
- j Click **Browse**, select file, and click **Open**.
- k Click **Create Ticket**.
- l Repeat steps **e – k,** selecting **IT Request** from the **Category (level 1)** dropdown box and **Burn CD(s)** from the **Category (level 2)** dropdown box.

12 Verify HD functionality
- a Verify the problem tickets are created.
- b Verify escalation notifications and elevations. Once the escalations are verified, associate the knowledge base article to the ticket and close.
- c Verify ticket auto-assignment rules.
- d Verify approval process definitions.

13 Create a customized Help Desk report
- a Click on the **Reports** tab, and then click the **Create Report** sub tab.
- b Select **Ticket** for the **Data Type** and click **Next**.
- c Select **Tabular** and click **Next**.
- d Click **Add Filter**.
- e Select **Open Date**, then **in range**, and **Last 24 Hours** from the dropdowns.
- f Click **Add to Report** then click **Next**.
- g Select **Age** from **Available Columns** and click **Add**.
- h Click **Next**.
- i Select **Age** from the **Primary** dropdown box and select **Ascending**.
- j Enter "Opened in last 24 hours" in the **Report Name** field.
- k Select the **Available to all specialists** checkbox.
- l Select **Ticket Reports** from the **Folder** dropdown box.
- m Click **Finish**.