Getting Started with the DCHR Service Desk

District Service Management Program



October 30, 2008

Contacting the District Service Management Group

You can access the District Service Management group's website at http://dsmp.in.dc.gov. From this website, you can obtain information about the District Service Management products and services.

District of Columbia

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If you have comments or suggestions about this documentation, contact the District Service Management Group Customer Care by email at DSMCustomerCareTeam@dc.gov.

Table of Contents

1 Scope and Audience

This document will give you an introduction to the life cycle of a basic DCHR Service Desk record and get you up to speed quickly.

This document is for you if you intend to create and resolve DCHR Service Desk records within the application as a supplemental aid to application training. This document does not replace training, and does not cover all facets of the DCHR Service Desk application.

2 Getting Started

2.1 Logging In

Follow these steps to log into the DCHR application:

1. Start the Remedy client tool to access the login dialog. If you have not been given a User Name, contact DSM at DSMCustomerCareTeam@dc.gov
2. Enter your User Name and Password and then click the **OK** button.

   Remedy User Name = Email ID
   Remedy Password = Network ID

   (Figure 1) *Your User Name will be everything before the @ sign of your email address.* For example, `jim.jones2@dc.gov` would have the User Name `jim.jones2`. *Your Password will be the same one that you use for network access.* (Figure 2) Your console displays when you log in. (Figure 3)

Figure 1 – Log in to Remedy with your Email ID (everything before the @ sign)

Figure 2 - Log into Remedy with the same password you use for network access

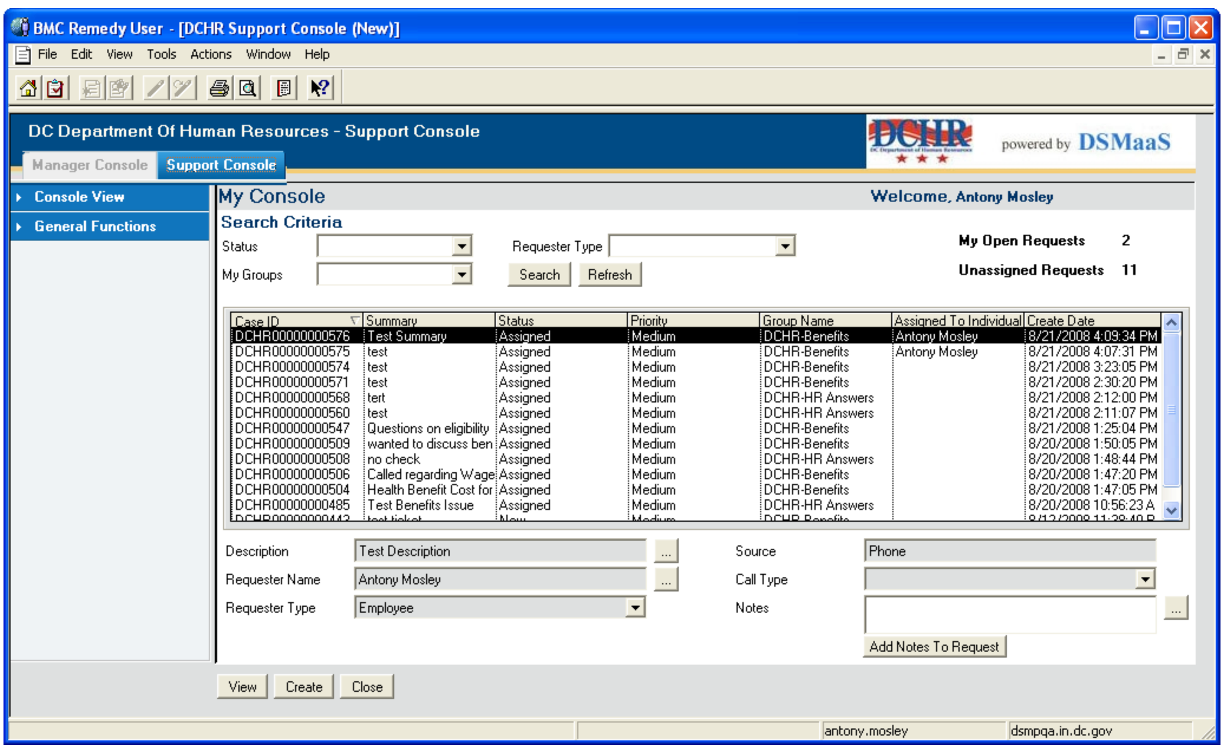


Figure 3 – Your Console screen

2.2 Create a Shortcut to your Desktop for DCHR Answers

1. Select **File**>**Open**>**Object List** from the menu bar displayed at the top of your screen (Figure 4) to open the Object List. This list displays the forms and applications available on the Remedy Server.

Figure 4 – Opening the Object List

2. Click the **Find** tab and then type `dchr` for your search term. Click the **Find** button on the right. **DCHR Answers** will display as one of your results. Make sure the **Type** field displays **Application**. (Figure 5)
3. Right click on **DCHR Answers** and select **Create Shortcut** from the menu. (Figure 5) The **Save a Shortcut** dialog displays. (Figure 6)

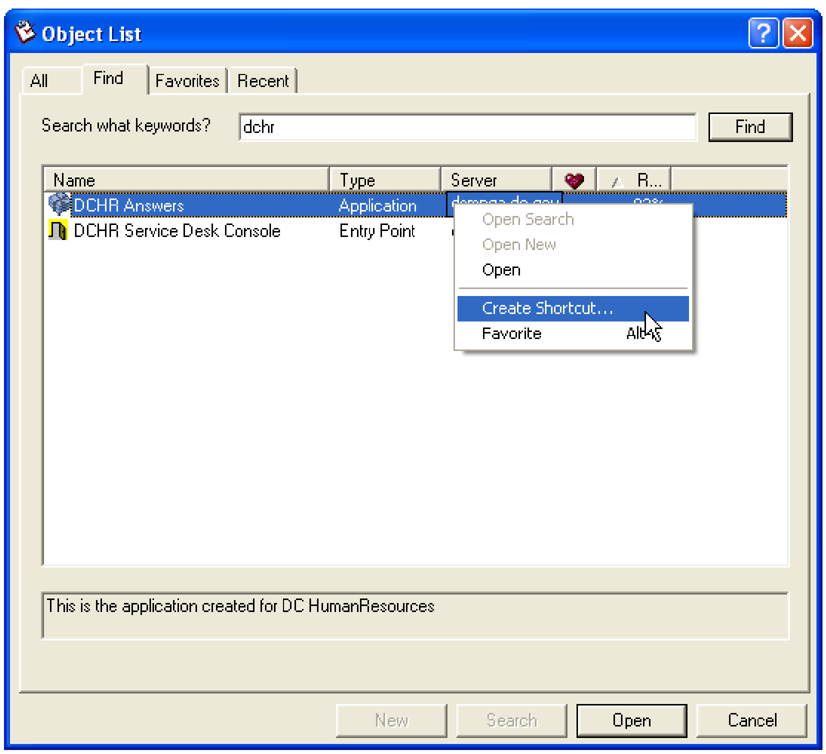


Figure 5 – Creating a shortcut

4. Make sure that you're saving your shortcut to your desktop (Figure 6). Enter `DCHR Service Desk 7.1` for the **File name**, and then click **Save**.

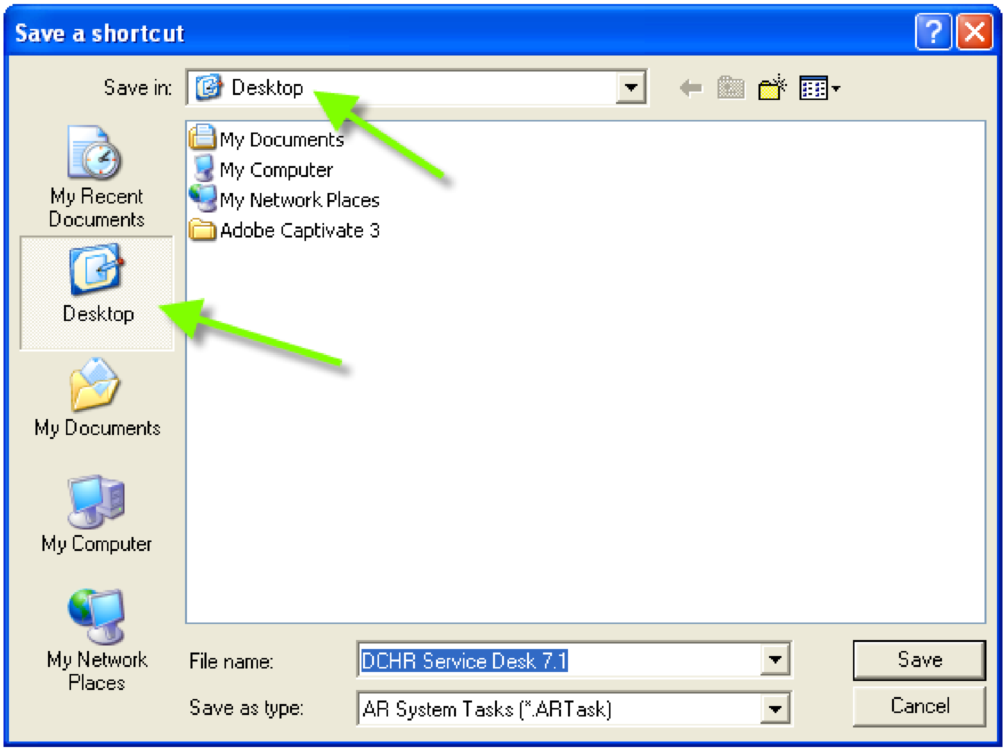


Figure 6 – Save your shortcut to your Desktop

5. The shortcut icon will display on your desktop. (Figure 7)

Figure 7 – DCHR Answers desktop icon

2.3 Create a Shortcut for the Old Remedy

1. Click on **Tools** > **Login**. The Login dialog displays. (Figure 8)

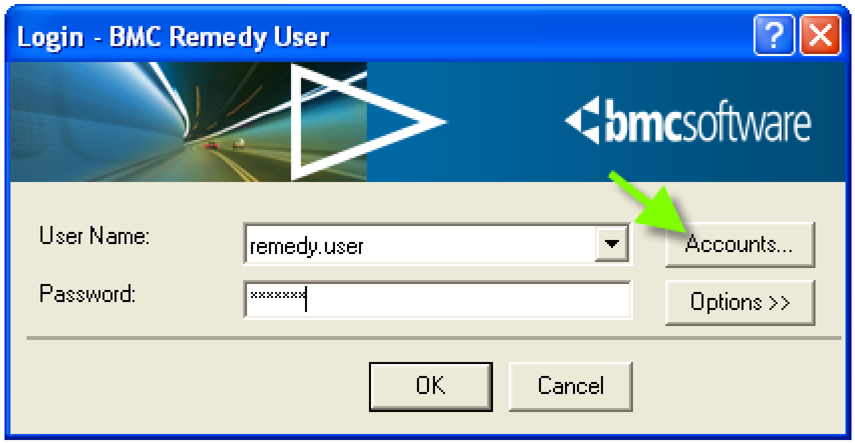


Figure 8 – Accessing your Accounts

2. Click the **Accounts** button, and then use the **Add** button to add **remedy.in.dc.gov** to the server list in the **Account** dialog.
3. Place an x next to the server you are currently using (Figure 9), and then click **OK.**

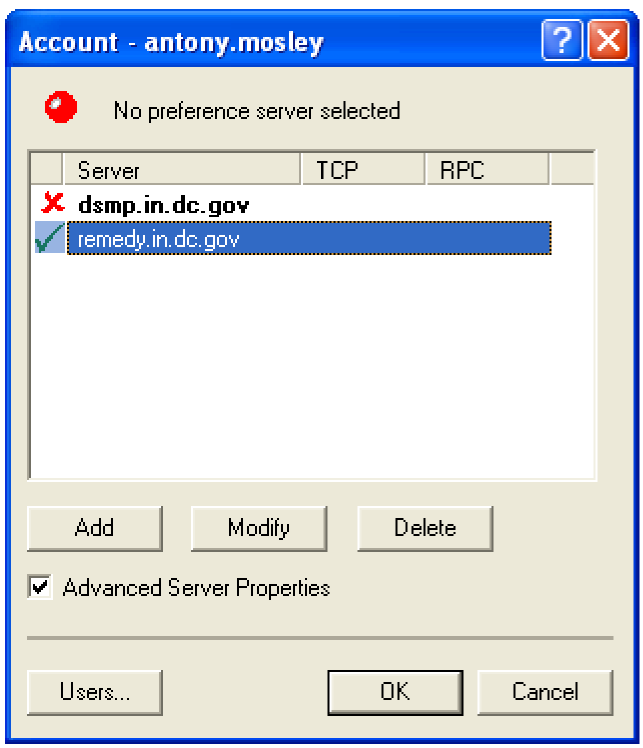


Figure 9 - Your Account dialog

4. Click **OK** for the Login dialog. The previous version of Remedy displays. (Figure 10)

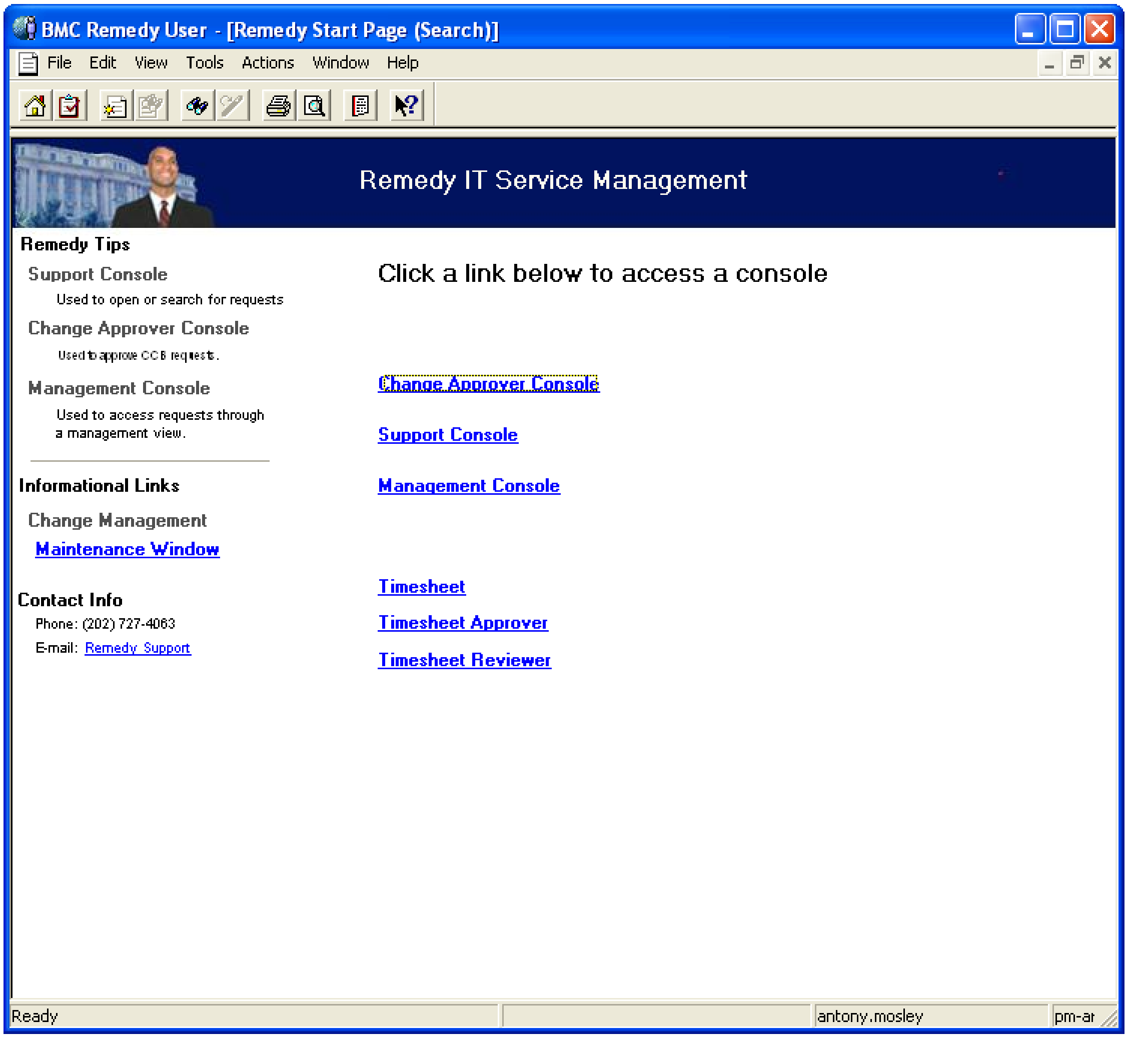


Figure10 – Remedy 5.5

5. Click the **Support Console** link to access the **IT Service Support Console**.
6. Select **File > Open > Object List** from the menu. The **Object List** displays.
7. Click the **Find** tab, enter **`remedy support`** for your search term, and then click the **Find** button.
8. Right click on the **Remedy Support** application, and create a shortcut to your desktop.
9. Rename the shortcut as **Old Remedy.**

Insert the image of the “old remedy” icon here.

3 Working with Requests

3.1 The Console View

You may click on the **Console View** links to the left of the screen to change the data displayed on your console, and the **General Functions** links for quick access to the various functions within the application.

The options in your **Console View** are:

- **Show All Open –** Displays all open tickets for your group(s)
- **Show Unassigned –** Displays all unassigned tickets in your group(s)
- **Assigned To Me –** Displays all tickets assigned to your login ID
- **Show My Open –** Displays all open tickets assigned to your login ID and unassigned tickets assigned to your group(s)

The options in your General Functions are:

- **New Request –** Creates a new DCHR request
- **Search Request –** Launches your search screen
- **My Profile –** Allows you to update your contact information
- **Reports –** Launches reports for DCHR requests
- **Survey –** Displays your user surveys (This link is only viewable to managers who have been given access to survey results)

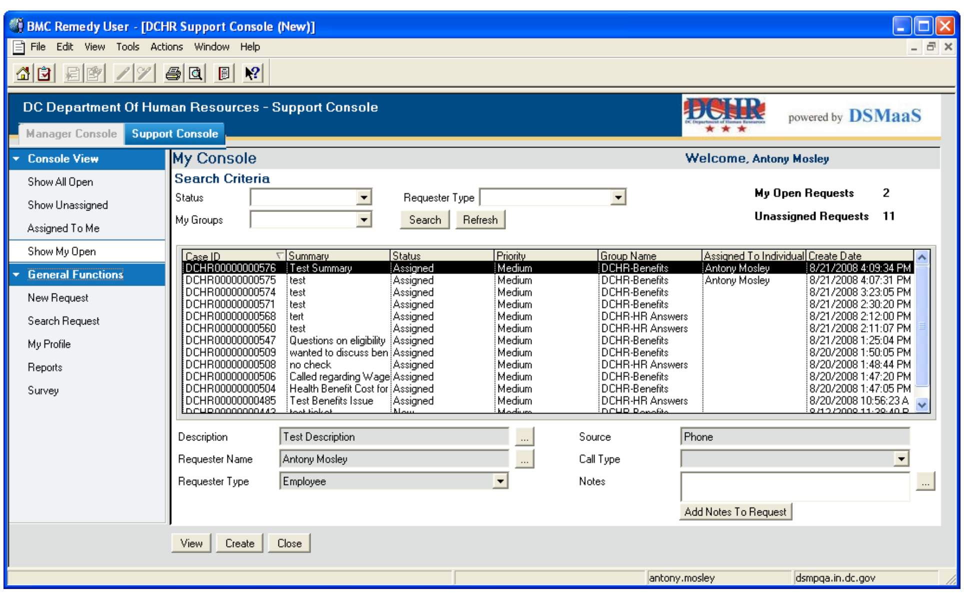


Figure 11 – Your Console

3.2 Your Search Criteria

You can adjust the view of your console by selecting different search criteria. You may select an alternate Status, Group or Requester Type from the drop down lists. Click the **Search** button to display your results.

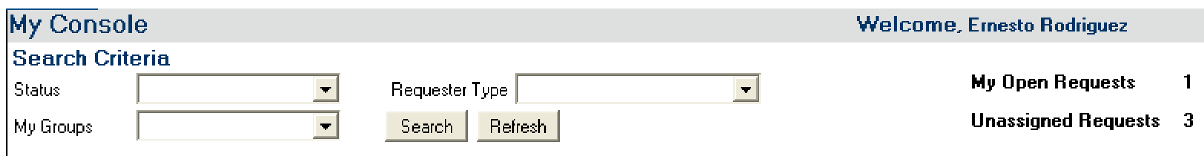


Figure 12 – Search criteria for your console

3.3 Adding Notes to a Request

You may add a note to a request from your console. (Figure 13) As you click on the requests in your console, its information is displayed in the fields below. Enter a note in your Notes field, and then click the **Add Notes To Request** button to add it to the **Work Info History** list of your request. The **Work Info History** is discussed in section 4.2.

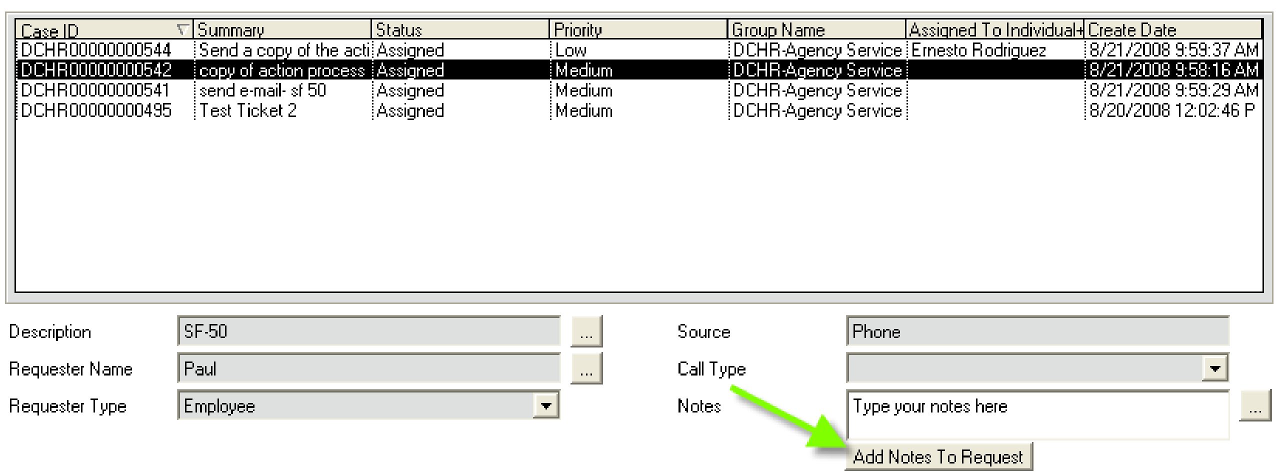


Figure 13 – Click this button to add your notes to a request

3.4 Submit a New Request

1. To create a new request from the **Support Console**, click the **General Functions** link, if necessary, and then click the **New Request** link (Figure 14) to display the **Incident Request Information** form (Figure 15). You may also click on the **Create** button at the bottom of the screen.

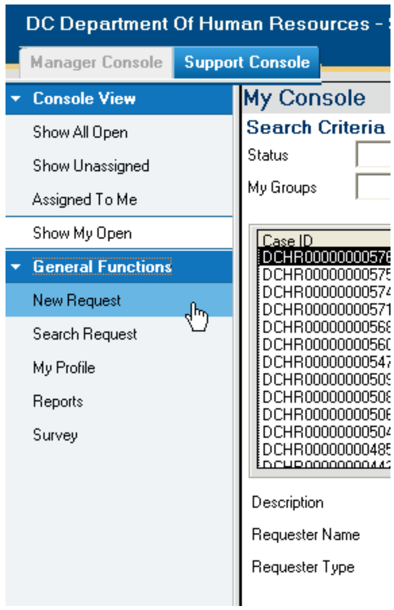


Figure 14 – New Request link

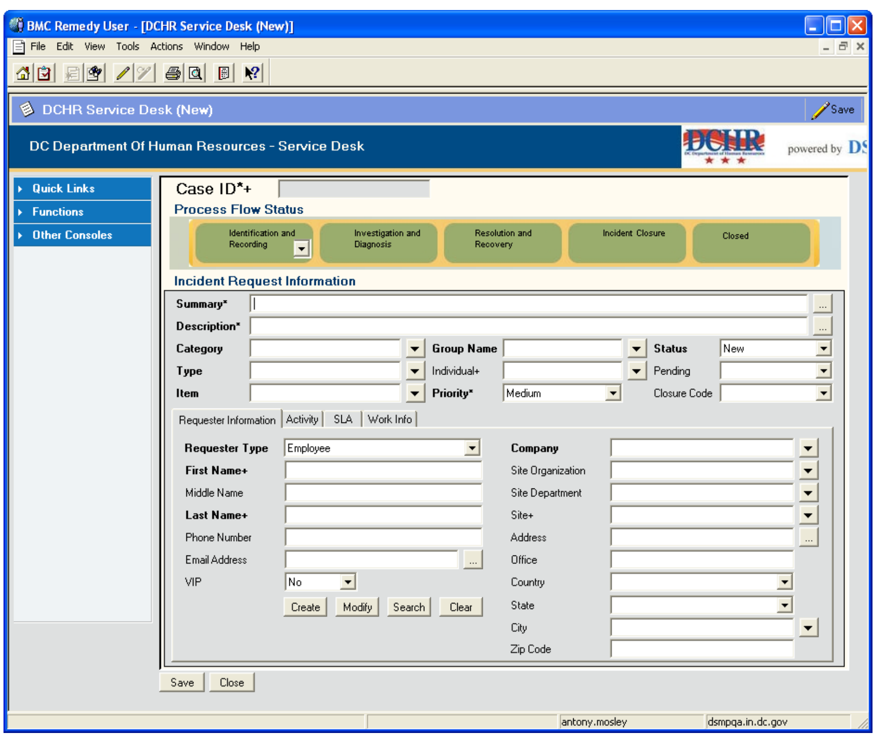
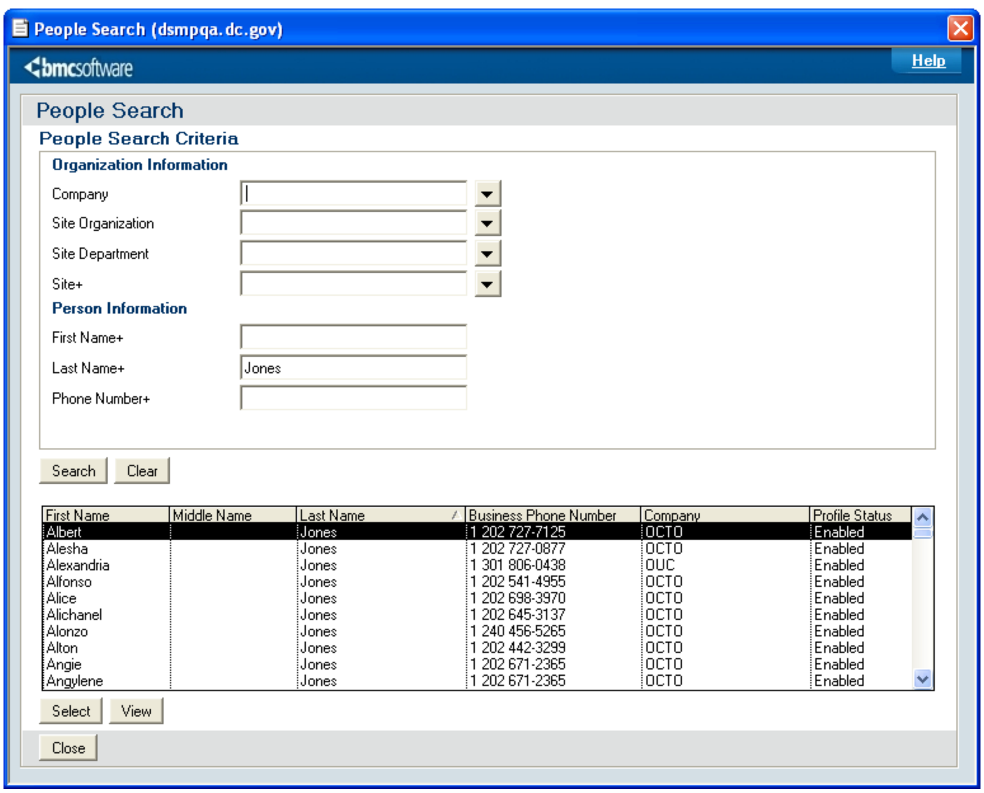


Figure 15 – Incident Request Information form

2. You may use the **Process Flow Status** section at the top of this form to move through the process quickly. If you are using the system for the first time, it is best for you to understand the whole process before using that option.
3. **Search for or create the requester:** You should always verify the customer's first name, last name and spelling by phone or in person. If the customer is sending in an email request, you

can enter their first name and last name in the respective fields, and press **Enter** on your keyboard to retrieve their information. If their information does not display, use the steps outlined below to search or create a record.

- To search for the requester, enter the last name of the requester in the **Last Name** field, and then click **Search**. The **People Search** form displays.
- Click on the correct requester's name from the resulting list, and then click the **Select** button of the **People Search** form. The requester's information will display on your new request.
- Choose a **Requester Type** from the list directly above the **First Name** field. **Requester Type** will default to "Employee."
- You may enter more information at the top of the **People Search** form and click the **Search** button for more results. (Figure 16)
- You may enter parts of the first and last name and press **Enter** to retrieve your results.


People Search (dsmpqa.dc.gov)

Help

People Search

People Search Criteria

Organization Information

Company

Site Organization

Site Department

Site+

Person Information

First Name+

Last Name+ Jones

Phone Number+

Search Clear

First Name	Middle Name	Last Name	Business Phone Number	Company	Profile Status
Albert		Jones	1 202 727-7125	OCTO	Enabled
Alesha		Jones	1 202 727-0877	OCTO	Enabled
Alexandria		Jones	1 301 806-0438	OUC	Enabled
Alfonso		Jones	1 202 541-4955	OCTO	Enabled
Alice		Jones	1 202 698-3970	OCTO	Enabled
Alichanel		Jones	1 202 645-3137	OCTO	Enabled
Alonzo		Jones	1 240 456-5265	OCTO	Enabled
Alton		Jones	1 202 442-3299	OCTO	Enabled
Angie		Jones	1 202 671-2365	OCTO	Enabled
Angylene		Jones	1 202 671-2365	OCTO	Enabled

Select View

Close

*Figure 16 –Choose the requester from the resulting list or enter new search criteria and click the **Search** button.*

- Create the requester profile if they do not appear in your search results. Click the **Create** button on the **Incident Request Information** form (Figure 15) to start the **People** form. (Figure 17)

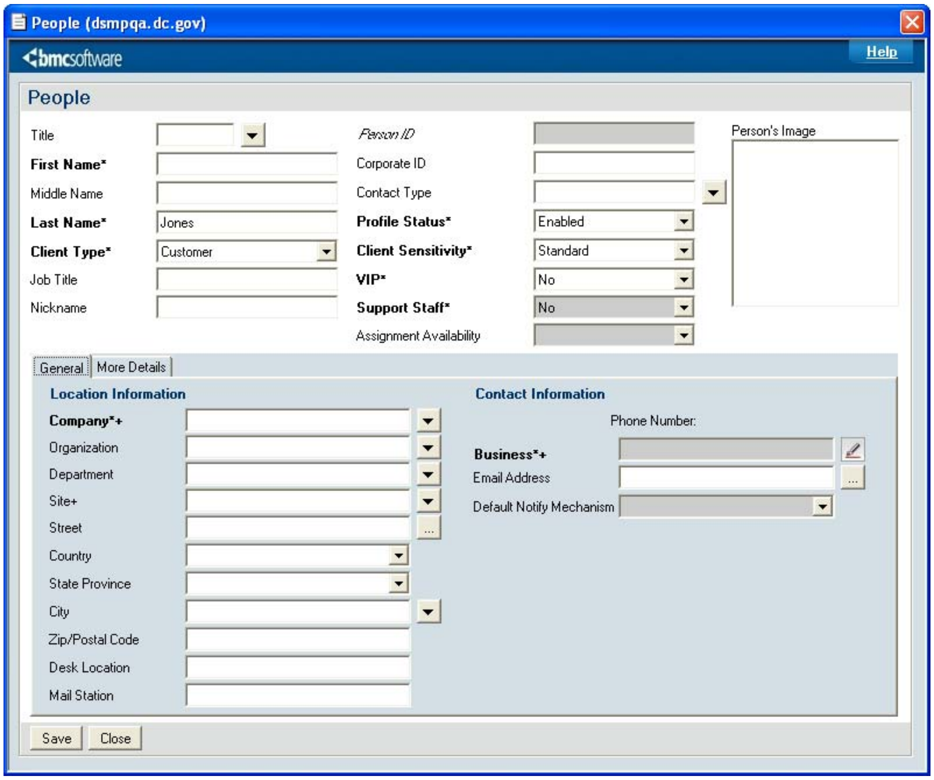


Figure 17 – The People form

- Fill in as much of the requester's information as you can in the **People** form. The fields in bold print are required fields. The requester's information will not be saved unless the required fields are filled in. When you click the **Save** button, your new requester information will display in the **Requester Information** area of your new request.
- Include an email address whenever possible. That way the user will receive notifications by email as well as the customer satisfaction survey upon resolution of their request.
- For current employees, choose a Site from the list. The **Site** will be determined based by the Organization and Department you have selected. For external customers, include the street address, state, city, and zip code whenever possible using the appropriate fields.

4. The following information will summarize the request, and route the request to the appropriate group.
   - **Summary** – The Summary field contains a brief statement regarding the request. This field will display in your console view when you log in, so make it easy to understand at a glance.
   - **Description** – The Description field should contain more details of the request.
   - **Category** - The **Category** field is the broadest categorization of the request. For example, request categories could include **Audits, Employee Records** or **Benefits.**
   - **Type -** The **Type** field is determined by the value you selected for the **Category** field. The **Type** field identifies the request with more precision. For example, if you choose

Benefits for the Category, your request type might be **Dental, Health Benefits,** or **Vision.**

- **Item -** The **Item** field is determined by the values you selected for the **Category** and **Type** fields. The **Item** field is the action to be performed on your Category and Type. For example, the items could include **Didn't Receive, Requesting,** or **Where to Mail.**

5. Choose a **Group Name** from the drop down list. (Figure 18) The groups that appear in the drop down list are determined by the **Category, Type**, and **Item** you have selected.

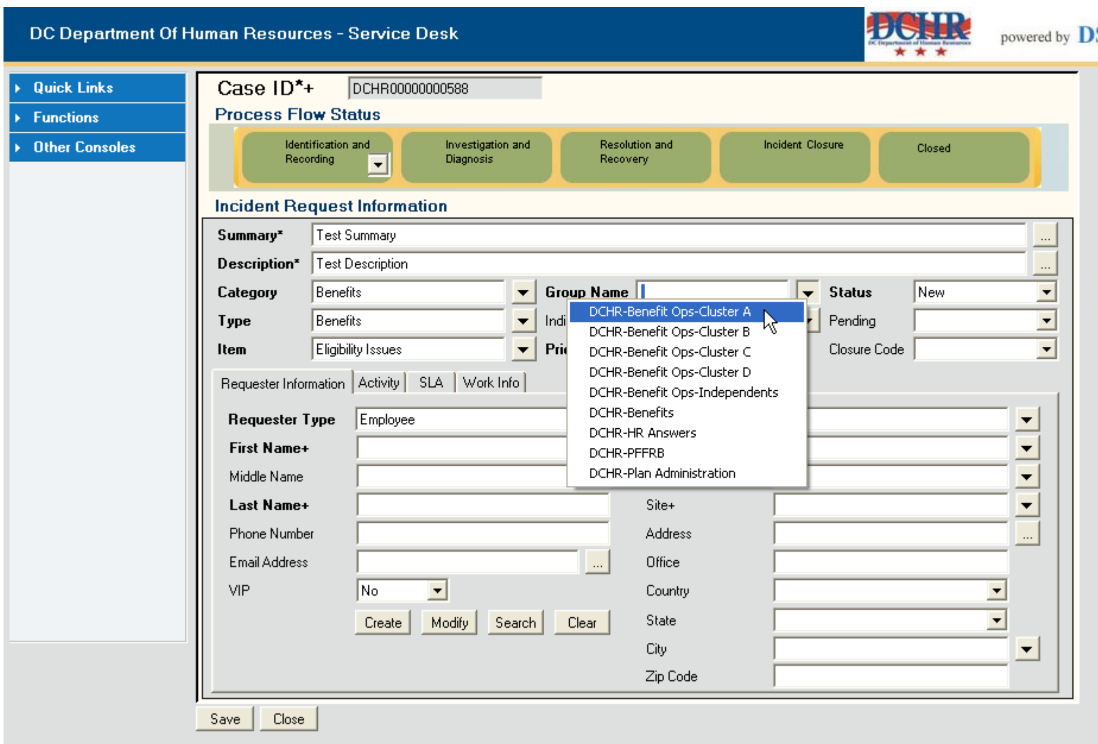


Figure 18 – Choose a Group Name from the list

6. Choose your name from the **Individual** drop down list if you are going to work on the request. If you are not going to work on the request, do not choose an **Individual**. An **Individual** will be selected by the group receiving the request.
7. Choose a **Priority** from the drop down list. Your choices are **Low, Medium, High** and **Urgent**. The priority dictates the time for your service level agreements (SLAs). The priority will default to **Medium**.
8. The **Status** is set to **New** when you create a request. The **Status** value will change automatically based on your progress with the request. You may also select a **Status** at any time appropriate during the life cycle of a request.
9. Click on the **Activity** tab of your new request. (Figure 19)
10. Click on the down arrow of the **Source** field. Choose the source that best describes the way your request came in, and, if necessary, choose a **Call Type** from the list directly below. (Figure 20)

11. If your request came in via Tele Text Type, be sure to select **Tele Text Type** under **Call Type**. If the **Call Type** is **Language Translator**, you must also choose the **Language** from the drop down list. If your call was neither of these options, you may leave the field blank. (Figure 21)

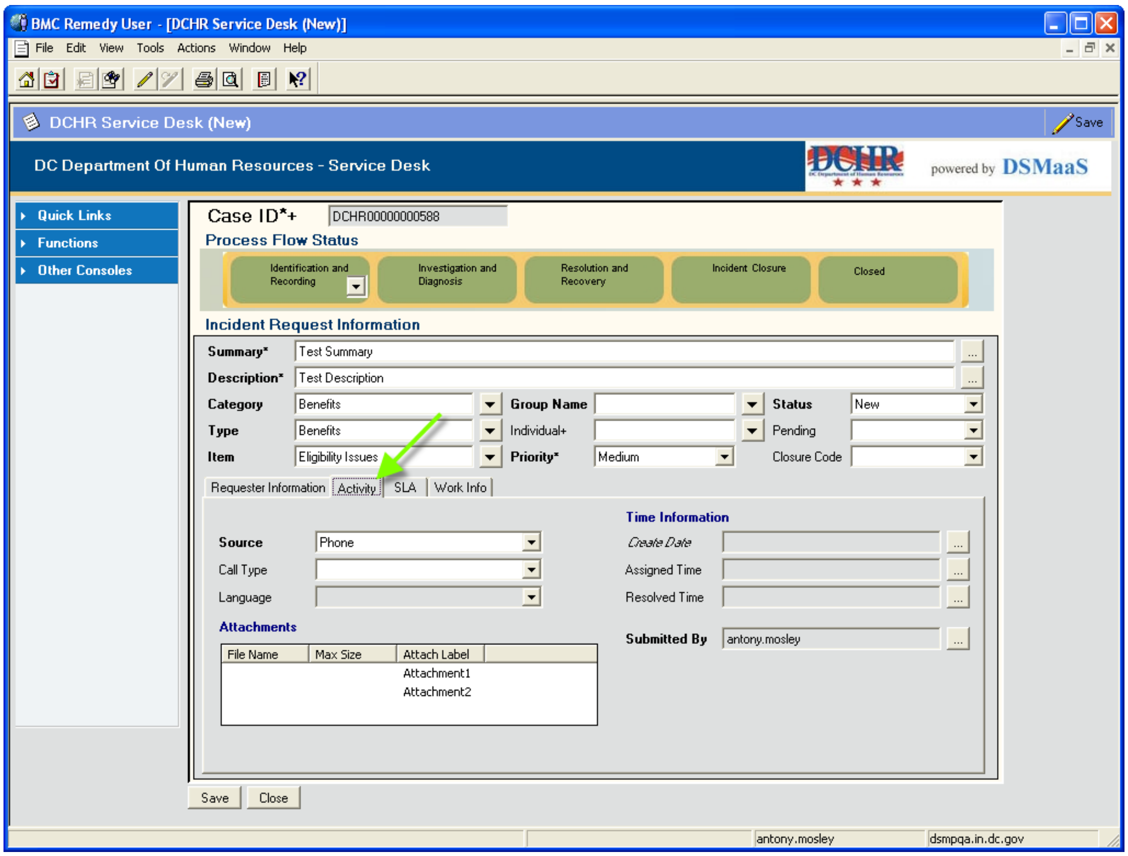


Figure 19 – Activity tab

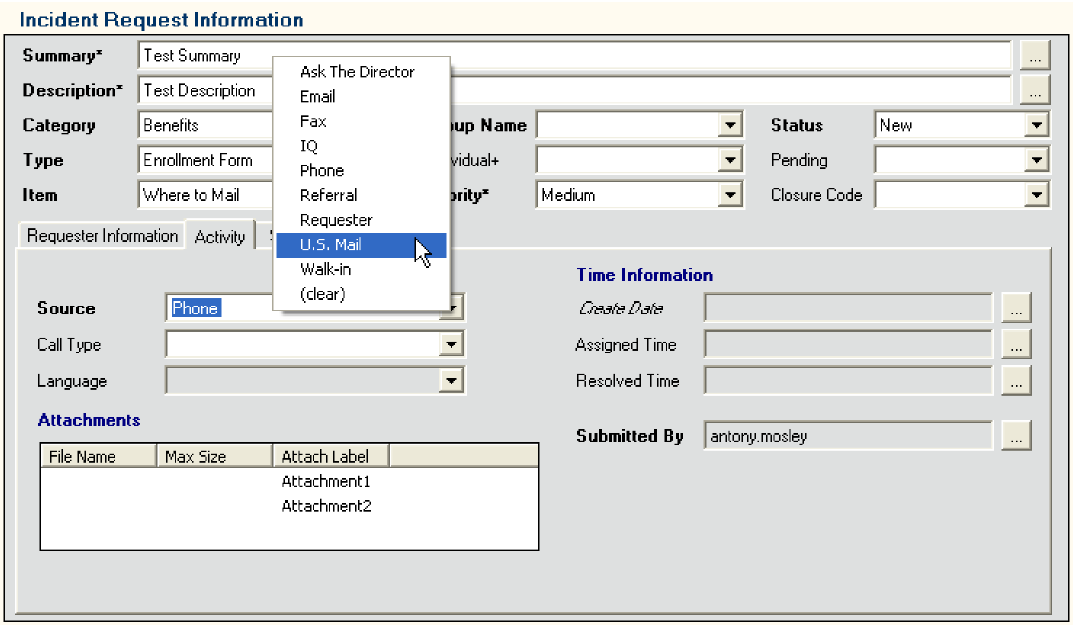


Figure 20 – Choose a Source and Call Type if necessary

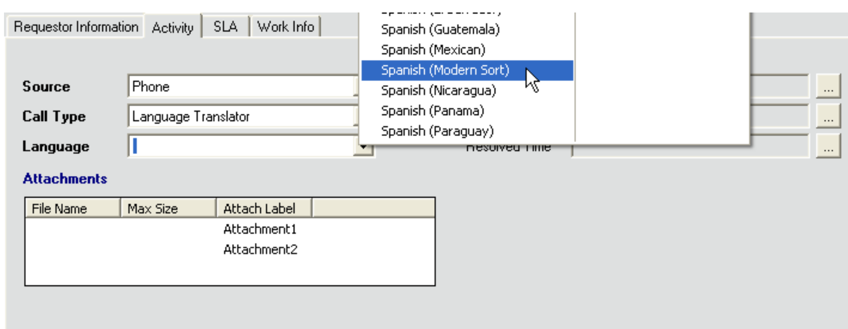


Figure 21 – Choose a Language if your requester uses an interpreter

12. If you would like to add attachments to your request, right click anywhere in the **Attachments** area, and select **Add** from the pop up menu. (Figure 21) Select your document from the resulting list and then click **Open**. Your attachment will display in the list.

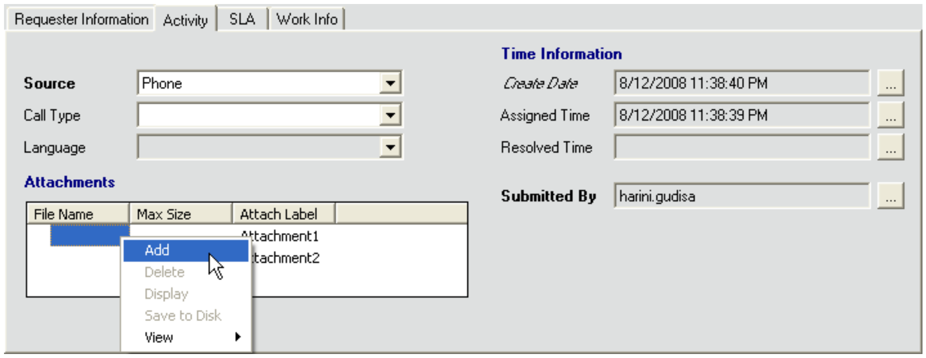


Figure 21 – Adding an attachment

13. Click on the **Work Info** tab to complete your new request. The details are outlined below.

3.5 Update the Work Info

This tab allows you to enter new work items and view existing work items. (Figure 22) Although you can resolve a ticket without adding items to the Work Info tab, it's very important to add at least some details to your request for future reference.

1. Select a **Work Info Type** from the drop down list.
2. Select a **Source** from the drop down list.
3. Type in your **Work Summary**. You may also click the box to the right of the **Work Summary** field for more writing space. The extra space makes it easier to write, or to paste an email message.
4. You may right click in the **Attachment** area, and then select a document to add it to your work information.
5. Click the **Add to Work Info History** button when your information is complete. A confirmation message will display, and your new entry will be listed in the **Work Info History** list. Please keep in mind that once you add this work info to the work log, the information becomes read-only and you will not be allowed to modify the entry.
6. You may view a single entry by double clicking on it from the **Work Info History** list, or by selecting it and clicking the **View** button.
7. Click on the **View Entire Worklog** link to view all entries.
8. Click the **Save** button after updating the **Work Info** tab. When you click the **Save** button, the request becomes ready for you or any other user to modify and resolve.

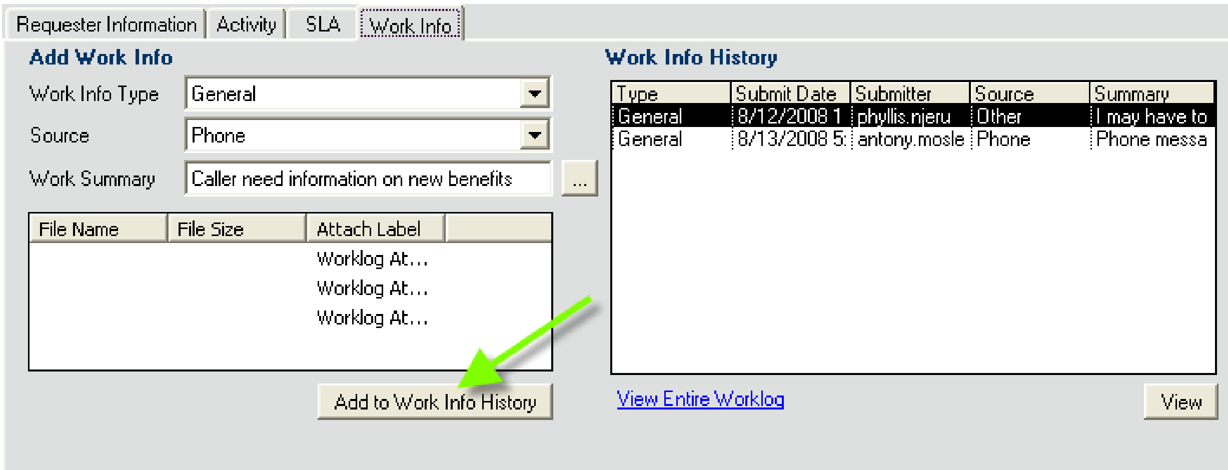


Figure 22 – Adding your entry to the Work Info History

3.6 Service Level Agreements

This tab contains the service level agreements (SLAs) for your request. (Figure 23) The Hours correspond to the Priority of your request. For example, an Urgent priority request will have a shorter time to resolve than a Low priority request. Check your SLA tab to see how much time is remaining on the SLA.

In the example below, there are 2 SLAs—one for response (the time you have to assign an individual to the ticket) and one for resolve (the time you have for setting the status of the ticket to Resolve). The Response time has been met, and the Resolution time has not yet been reached. When you click on an SLA in the top of this form, the corresponding Action will display in the second window, **Actions For SLA**. For the example below, you would have until 8/14/2008 8:54:37 AM to resolve the request.

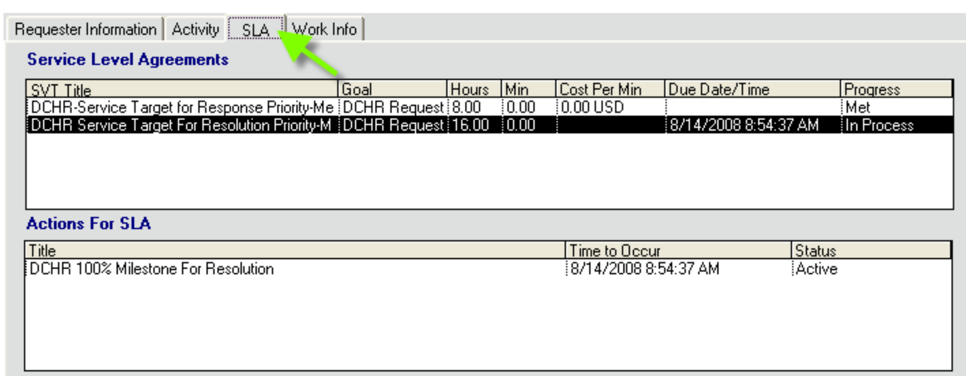


Figure 23 – Your SLA tab

4 Searching Requests

4.1 Quick Search

The top of your Support Console contains three fields that you can use for a search; **Status, My Groups** and **Requester Type**. This search is only for your Console view. Select your criteria and then click the **Search** button to display your results. (Figure 24)

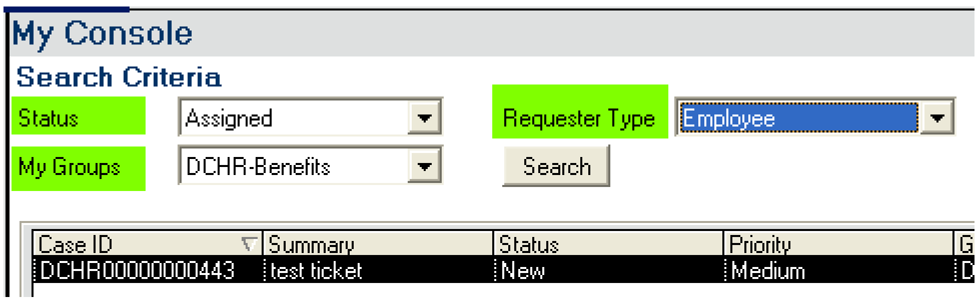


Figure 24 – Use these fields to change your Console view

4.2 Detailed Search

1. Click the **Search Request** link from your Support Console (Figure 25). The **Incident Request Information** search form displays. (Figure 26)

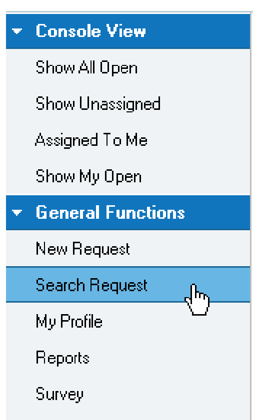


Figure 25 – Search Request link

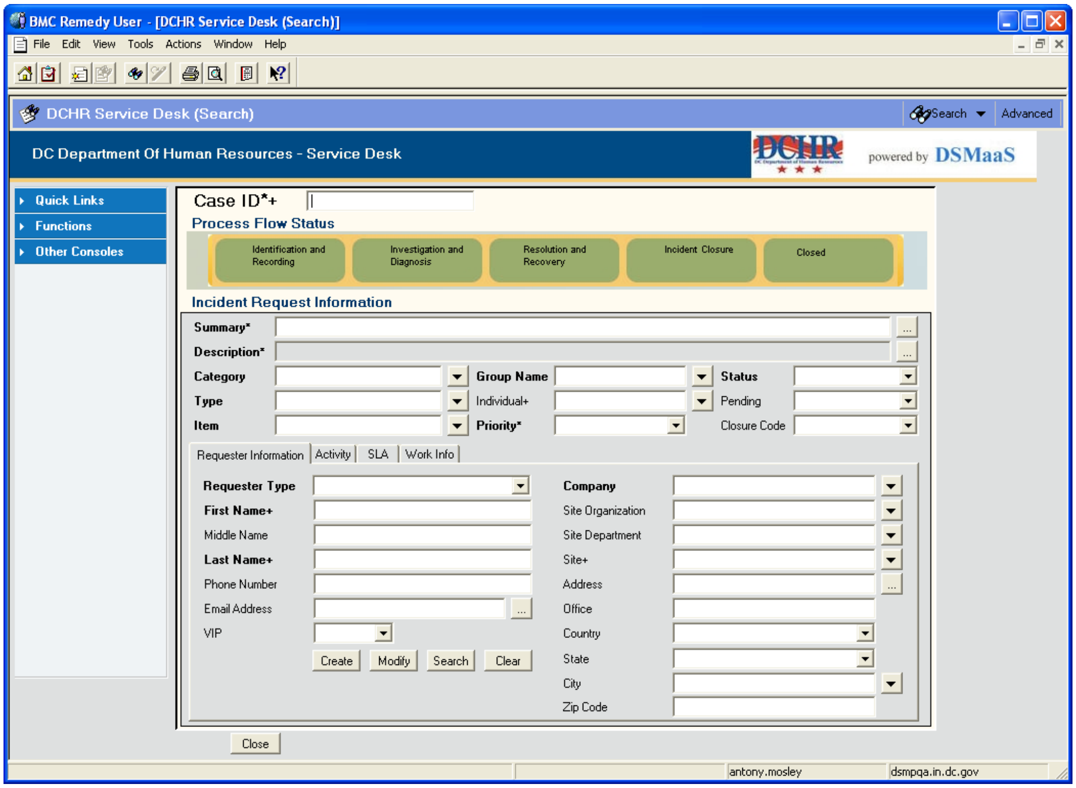


Figure 26 – The Incident Request Information search form

2. Enter your search criteria and then click the Search icon in the upper right corner. Your search results will display as a list.

5 Modifying Requests

5.1 Request Status

Service requests can assume any or all of six status choices over the course of their “lives”. As you modify a request, it is important that you update the status accordingly. The following table describes each status.

Status	Description
New	This is the default status for a new ticket.
Assigned	This is the status immediately upon submission or transfer of a ticket to a support individual and/or group. A ticket in this state has had no work performed on it beyond attempts at resolution (when appropriate).
Work-in-Progress (“WIP”)	Once a support individual and/or group has acknowledged the ticket and contacted the customer, it is considered work-in-progress, and you must manually change the status to Work-in-Progress. Compare to “Pending.”
Pending	A ticket in this state has had all the work done that support personnel can perform, and further work is dependent on an outside entity. Examples are that additional information is needed from the user, or action or materials are needed from an outside vendor. When you change the Status to Pending, you must also select a reason in the Pending list directly below the Status field. A Pending status stops the Service Level Agreement clock. Once the pending reason is reached, change the Status as needed, and clear the Pending reason field below the Status field.
Resolved	When you have completed a ticket, you must change the status to Resolved. Such a ticket is awaiting follow-up with the customer to verify that the problem has, in fact, been resolved. Contrary to one that has been Closed, a ticket can move from Resolved to a previous state. The system will automatically close any tickets that remain in a “Resolved” state for more than 3 business days.
Closed	A ticket is Closed in either of two situations: the user confirms that the problem has in fact been resolved; or after the passing of 3 business days with no contact from the user. Once marked Closed, a ticket *cannot* be re-opened or otherwise re-designated.

5.2 Process Flow Status

The Process Flow Status diagram at the top of your screen (Figure 27) can helps you visualize the full life cycle of your request. The system will allow you to close a request with all required fields completed and an Individual selected from the list. However, it is best to enter appropriate information on the **Activity** and **Work Info** tabs of your requests for reporting reasons.

5.3 Changing a Category, Type or Item

Follow these steps to change the **Category**, **Type** and/or **Item** of a request.

1. Open your request. (Figure 27)
2. Click the down arrow for the **Category** field, and select another category from the list.
3. Change the **Type** and **Item** fields as needed.
4. Choose a different **Group** and **Individual** if necessary, and then click **Save**.

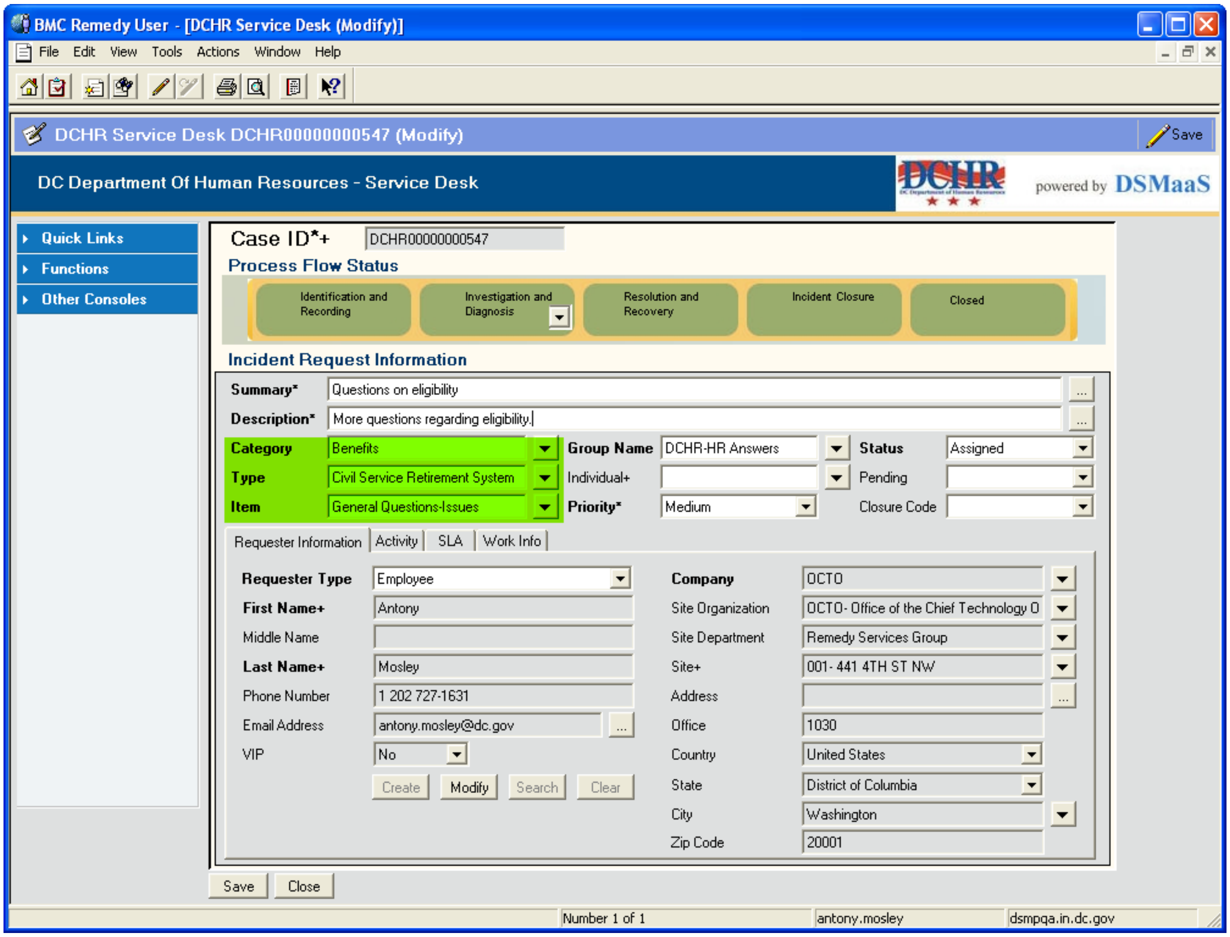


Figure 27 – Category, Type and Item fields

5.4 Transferring a Request Outside of the DCHR Service Desk System

When you transfer a request to a service desk outside of the DCHR Service Desk System, your DCHR request is closed, and a new request is created for the service desk receiving the transfer. Only individuals in certain groups have access to perform a transfer outside of DCHR. Follow these steps to transfer an existing request out of DCHR.

1. Open your request.
2. Click on the **Transfer** link from the Quick Links area of the support console. (Figure 28) A system note displays.
3. It's important to read the system note if this is your first time transferring a request. Click **OK** if you agree with the system note. The **Transfer Case** dialog displays. (Figure 29) Service requests are referred to as cases within the software.
4. Select the desired **Routing Group** from the list.
5. Update the **Summary** and **Description** if necessary. Remove any and all sensitive or confidential information from these fields.
6. Enter a **Transfer Reason**, and then click the **Case Transfer** button. Click **I Agree** in the resulting notification dialog.

7. Text in red print at the upper right corner of your ticket will indicate that the request is transferred.
8. This request will automatically close and you will not be able to modify it. You will receive a notification from the Outside Service Desk when the request you transferred has been resolved.

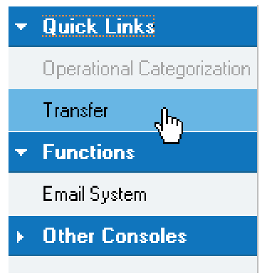


Figure 28 – The Transfer link

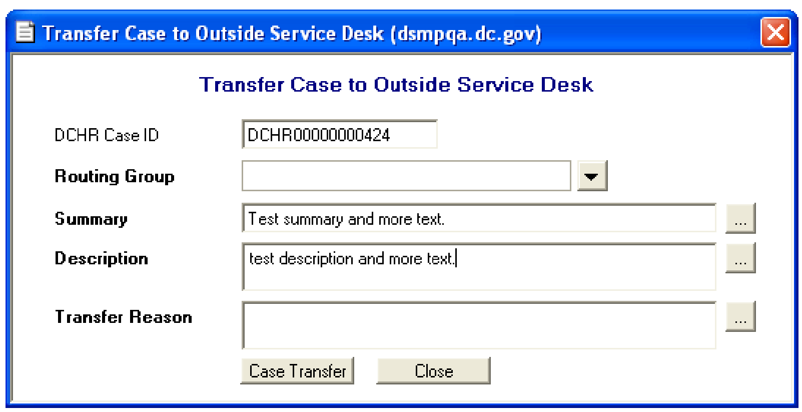


Figure 29 – The Transfer Case dialog

6 Resolving Requests

You can resolve a request when all conditions are met for the requester. Follow these steps to resolve your request.

1. Open your request.
2. Select **Resolved** from the **Status** list.
3. Click on the **Work Info** tab.
4. Select **Resolution** for the **Work Info Type.**
5. Select a **Source**.
6. Type in your details in the **Work Summary** field, and then click the **Add to Work Info History** button at the bottom of the form.
7. Click **Save**.

If the requester's email address is accurately stored in his/her profile, they will receive notification that his/her ticket has been resolved. The ticket will remain in a resolved status for 3 days. If the ticket is not re-opened it will automatically close at the end of 3 days. Tickets moved to **Closed** status cannot be reopened.

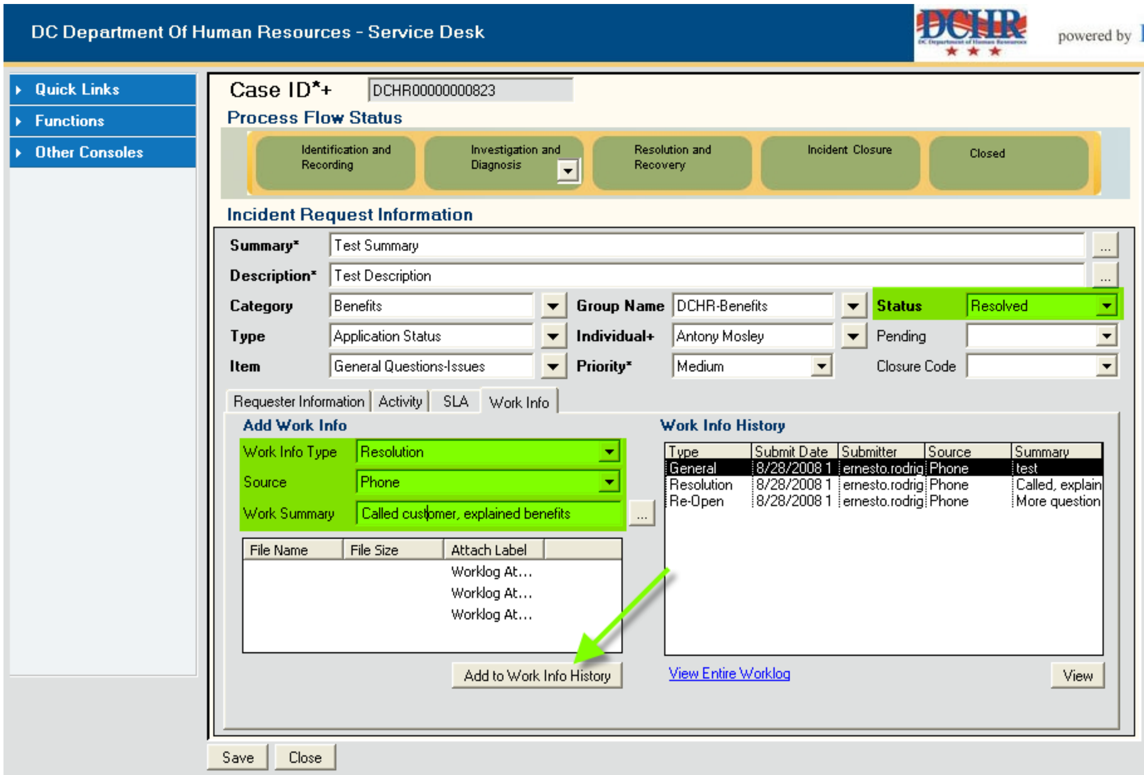


Figure 30 – Resolving a case

7 Email System

You may use the **Email System** to correspond with internal as well as external customers.

1. Open a request.
2. Select **Functions** if necessary, and then **Email System** from your console. (Figure 31) The Email System displays. (Figure 32)

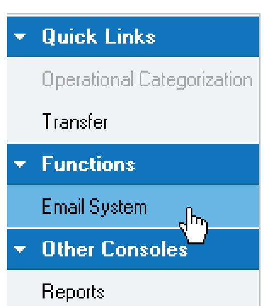


Figure 31 – Email System link

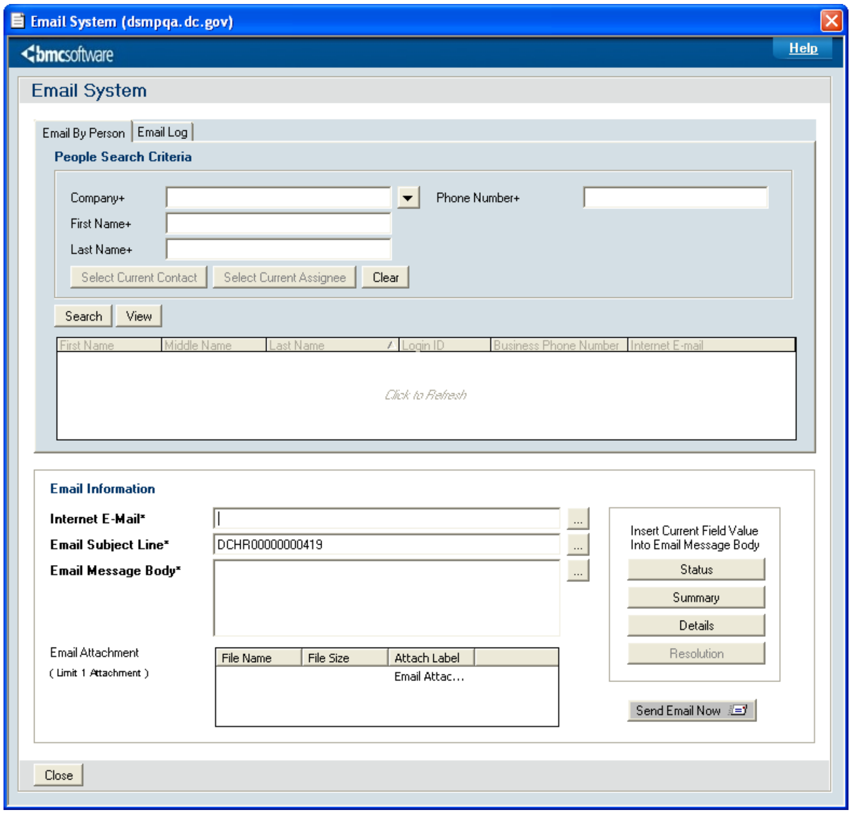


Figure 32 – Email System

3. To search for an email address, select a **Company** from the drop down list.
4. Enter a **First Name, Last Name** or **Phone Number**, and then press Enter on your keyboard. The names matching your search will display in the list.
5. Select the name of the person you would like to email from the list, and their address will display in the **Email Information** section below.
6. If you already know the email address of the person you are writing, you may enter it in the **Internet E-Mail** field.
7. Enter a **Subject** or accept the default.
8. Type in your message. You may use the **Status, Summary, Details** and **Resolution** buttons to the right to paste their respective information directly into your message body.
9. If you would like to include an attachment, right click in the **Email Attachment** list to select a file.
10. You may also click on the Email Log tab to view past email correspondence regarding your ticket.
11. Click the **Send Email Now** button to send the message.