

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 <u>http://dsmp.in.dc.gov</u>. 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 <u>DSMCustomerCareTeam@dc.gov</u>.

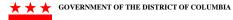
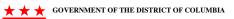




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1 Scope and Audience

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 <u>DSMCustomerCareTeam@dc.gov</u>
- 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)

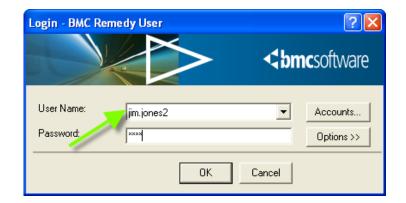
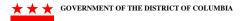


Figure 1 – Log in to Remedy with your Email ID (everything before the @ sign)





	Windows ^{xp} Professional	
Copyright © 1985 Microsoft Corpora		crosoft
User name:	jonesj2	
Password:	•••••	
Log on to:	×	
EN		

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

BMC Remedy User - [D		New)]						
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DC Department Of Hu Manager Console Supp	ıman Resources - Sı port Console	ipport Console				Constant of Hanna Streams	powered by DS	MaaS
➤ Console View	My Console					Welcome, Antony	y Mosley	
➤ General Functions	Search Criteria							
	Status	•	Requester T	Гуре	•	My Op	en Requests	2
	My Groups	-	Search	Refresh		Unass	igned Requests	11
		-			1			
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	DCHR00000000574 DCHR00000000571	test test	Assigned Assigned	Medium Medium	DCHR-Benefits DCHR-Benefits		8/21/2008 3:23 8/21/2008 2:30	
	DCHR0000000568	tert	Assigned	Medium	DCHR-HR Answe		8/21/2008 2:12	
	DCHR0000000560	test	Assigned	Medium	DCHR-HR Answe	ers	8/21/2008 2:11	
	DCHR0000000547 DCHR00000000509	Questions on eligibility wanted to discuss ben	Assigned	Medium Medium	DCHR-Benefits DCHR-Benefits		8/21/2008 1:25 8/20/2008 1:50	
	DCHR0000000508	no check	Assigned	Medium	DCHR-HR Answe	ers	8/20/2008 1:48	3:44 PM
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		toot tick of	Nou	Modium	DCHP Popolito		8/20/2008 10:5	0.20 H
	Description	Test Description			Source	Phone		
	Requester Name	Antony Mosley			Call Type			•
	Requester Type	Employee		-	Notes			
						Add Notes To Request		
	View Create C	lose						
					antony	/.mosley	dsmpqa.in.dc.gov	1

Figure 3 – Your Console screen

2.2 Create a Shortcut to your Desktop for DCHR Answers

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

- 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)

😵 Object List			? 🔀
All Find Favorites Recent			
Search what keywords? dchr			Find
Name	Туре	Server 😻 🛆 R	
CHR Answers DCHR Service Desk Console	Application Entry Point	Open Search Open New Open Create Shortcut Favorite Alt	
,			
This is the application created for DC Hu	manResources		
	New	Search Open	Cancel

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**.



Save a shortcut	İ				? 🔀
Save in: My Recent Documents Desktop My Documents		ices	•		·
My Computer					
My Network Places	File name:	DCHR Service Desk 7.1		•	Save
Flaces	Save as type:	AR System Tasks (*.ARTask)	•	Cancel

Figure 6 – Save your shortcut to your Desktop

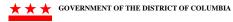
5. The shortcut icon will display on your desktop. (Figure 7)



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)





Login - BMC Ren	nedy User	? 🗙
		Solution
User Name: Password:	remedy.user	Accounts Options >>
	ОК	Cancel

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**.

Account - antony.mosle	∍y		? 🗙						
O preference server selected									
Server	TCP	RPC							
🗴 dsmp.in.dc.gov									
🖌 remedy.in.dc.gov									
Add Modify	De	ete							
Advanced Server Proper	ties								
		_							
Users	OK	Car	ncel						

Figure 9 - Your Account dialog

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



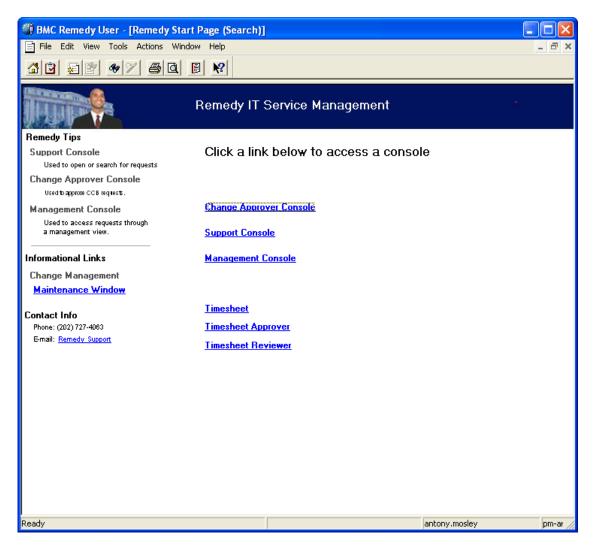
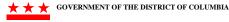


Figure10 – Remedy 5.5

- 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:

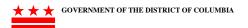
- **Show All Open** Displays all open tickets for your group(s)
- Show Unassigned Displays all unassigned tickets in your group(s)
- Assigned To Me Displays all tickets assigned to your login ID
- Show My Open Displays all open tickets assigned to your login ID and unassigned tickets assigned to your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

🕼 BMC Remedy User - [DCHR Support Console (New)]										
	E File Edit View Tools Actions Window Help									
DC Department Of Human Resources - Support Console										
 Console View 	My Console					Welcome, Antony	Mosley			
Show All Open	Search Criteria					M. 0	en Requests	2		
Show Unassigned	Status	-	Requester Type	1 .	•		•	-		
Assigned To Me	My Groups	•	Search R	efresh		Unassi	gned Requests	11		
Show My Open	Case ID	✓ Summary	Status	Priority	Group Name	Assigned To Individ		<u> </u>		
General Functions New Request Search Request My Profile Reports Survey	DCHR0000000575 DCHR0000000575 DCHR0000000575 DCHR0000000571 DCHR0000000550 DCHR0000000550 DCHR0000000550 DCHR0000000550 DCHR0000000550 DCHR0000000550 DCHR0000000550 DCHR0000000550 DCHR0000000550 DCHR00000000550 DCHR00000000550 DCHR00000000550 DCHR00000000550 DCHR00000000555 DCHR00000000555 DCHR0000000555 DCHR0000000555 DCHR0000000555 DCHR0000000555 DCHR0000000555 DCHR0000000555 DCHR0000000555 DCHR0000000555 DCHR000000555 DCHR0000000555 DCHR0000000555 DCHR0000000555 DCHR0000000555 DCHR0000000555 DCHR0000000555 DCHR0000000555 DCHR0000000555 DCHR0000000555 DCHR0000000555 DCHR0000000555 DCHR0000000555 DCHR0000000555 DCHR000000555 DCHR000000555 DCHR000000555 DCHR000000555 DCHR000000555 DCHR000000555 DCHR000000555 DCHR000000555 DCHR00000555 DCHR00000555 DCHR00000555 DCHR00000555 DCHR00000555 DCHR00055 DCHR00055 DCHR00055 DCHR00055 DCHR00055 DCHR00055 DCHR00055 DCHR00055 DCHR00555 DCHR0055 DCHR00555 DCHR00555 DCHR0055 DCHR00555 DCHR00555 D	Test Summary test test test Questions on eligibility wanted to discuss ben no check Called regarding Wage Health Benefit Cast for Test Benefits Issue	Assigned Assigned Assigned Assigned Assigned Assigned Assigned Assigned Assigned	Medium Medium Medium Medium Medium Medium Medium Medium Medium Medium	DCHR-Benefits DCHR-Benefits DCHR-Benefits DCHR-HR Answer DCHR-HR Answer DCHR-Benefits DCHR-Benefits DCHR-Benefits DCHR-Benefits DCHR-Benefits DCHR-HR Answer DCHR-Benefits DCHR-HR Answer	Antony Mosley Antony Mosley S S	8/21/2008 407: 8/21/2008 407: 8/21/2008 3231 8/21/2008 3231 8/21/2008 31231 8/21/2008 3124: 8/21/2008 1125: 8/20/2008 1026: 8/20/2008 148: 8/20/2008 147: 8/20/2008	31 PM 35 PM 35 PM 30 PM 30 PM 37 PM 34 PM 35 PM 35 PM 35 PM 35 PM 35 PM 35 PM 35 PM 35 PM 35 PM 36 PM 37 PM 30		
		1		_		Add Notes To Request	1			
	View Create	Close			antony.		dsmpga.in.dc.gov			

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.

My Console	e		W	elcome, Ernesto Rodriguez	
Search Crite	eria				
Status	-	Requester Type	-	My Open Requests	1
My Groups	•	Search Refresh		Unassigned Requests	3

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.

Case ID DCHR0000000544 DCHR00000000549 DCHR00000000541 DCHR000000000495	copy of action process send e-mail- sf 50	Priority Low Medium Medium Medium	Group Name DCHR-Agency DCHR-Agency DCHR-Agency DCHR-Agency	Service	
Description Requester Name Requester Type	SF-50 Paul Employee	···· ···	Source Call Type Notes	Phone Type your notes here Add Notes To Request	

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.





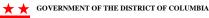


Figure 14 – New Request link

BMC Remedy User - [DC	HR Service Desk (Nev	v)]							
File Edit View Tools Ac	tions Window Help								- 8 ×
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DCHR Service Des	sk (New)								Save
DC Department Of H	uman Resources - :	Service Desk					Ð		oowered by DS
▶ Quick Links	Case ID*+								
▶ Functions	Process Flow Sta	ntus							
▶ Other Consoles	Identification Recording	and Investigation Diagnosis	n and	Resolu Recov	tion and ery	Inoident Clo	sure	Closed	
	Incident Request	t Information							
	Summary*								
	Description*								
	Category		-	Group Name		•	Status	New	
	Туре		-	Individual+		-	Pending		-
	Item		-	Priority*	Medium	-	Closure Cod	e	-
	Requester Information	Activity SLA Work In	nfo						
	Requester Type	Employee		-	Company				-
	First Name+				Site Organization				
	Middle Name				Site Department				
	Last Name+				Site+				
	Phone Number				Address				
	Email Address				Office				
	VIP	No			Country			•	
		Create Modify S	earch	Clear	State			-	
					City				
					Zip Code				
	Save Close								
					anton	y.mosley		dsmpqa.in.dc.gov	

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





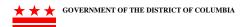
can enter their first name and last name in the respective fields, and press **Enter** on your keyboard to retrieve their information. If their information does not display, use the steps outlined below to search or create a record.

- 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.d	c.gov)			X
 bmcsoftware				<u>Help</u>
People Search				
People Search Criteria	1			
Organization Information				
Company		•		
Site Organization		•		
Site Department		•		
Site+		•		
Person Information				
First Name+				
Last Name+	Jones			
Phone Number+				
Search Clear				
First Name Middle Na		A Business Phone Number	Company	Profile Status
Albert Alesha	Jones Jones	1 202 727-7125 1 202 727-0877	OCTO OCTO	Enabled
Alexandria	Jones	1 301 806-0438	OUC	Enabled
Alfonso	Jones	1 202 541-4955	OCTO	Enabled
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Alton	Jones	1 202 442-3299	OCTO	Enabled
Angie Angylene	Jones Jones	1 202 671-2365 1 202 671-2365	0CT0 0CT0	Enabled 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)

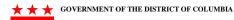




bmc software			Hel
People			
Title First Name* Middle Name Last Name* Client Type* Iob Title Nickname	Jones Customer	Pavxan/D Corporate ID Contact Type Profile Status* Client Sensitivity* VIP* Support Staff* Assignment Availability	Person's Image Enabled Standard No No
General More Da Company*+ Organization Department Site+ Street Country State Province City Zip/Postal Code Desk Location Mail Station	mation	► Bu	ontact Information Phone Number: usiness*+ hail Address ifault Notify Mechanism

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.

DC Department Of H	uman Resources -	Service Desk			C figur transit of the second	powered by D
 Quick Links Functions Other Consoles 	Process Flow St Identification Recording Incident Reques Summary* Test Description* Test Category Benef Item Eligibi Requester Information Requester Type First Name+ Middle Name Last Name+ Phone Number Email Address VIP	and Investigation Diagnosis Summary Description its Activity SLA Work In Employee	Find DCHRE Find DCHRE CCHRE CCHRE CCHRE CCHRE CCHRE CCHRE CCHRE CCHRE	Interfit Ops-Cluster A Benefit Ops-Cluster B Benefit Ops-Cluster C Benefit Ops-Cluster D Benefit Ops-Independe Benefits R Answers		
	Save Close					

Figure 18 – Choose a Group Name from the list

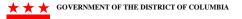
- 6. Choose your name from the **Individual** drop down list if you are going to work on the request. If you are not going to work on the request, do not choose an **Individual**. An **Individual** will be selected by the group receiving the request.
- 7. Choose a **Priority** from the drop down list. 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)

BMC Remedy User - [DC	CHR Service Desk (New)]	
File Edit View Tools A		- 7 ×
👂 DCHR Service De	esk (Ne w)	✓ Save
DC Department Of H	Human Resources - Service Desk powered by I	OSMaaS
▶ Quick Links	Case ID*+ DCHR0000000588	
➤ Functions	Process Flow Status	
▶ Other Consoles	Identification and Investigation and Resolution and Recording Closed Closed	
	Incident Request Information	
	Summary* Test Summary	
	Description	
	Category Benefits	
	Type Benefits 🗸 Individual+ 🔽 Pending 🔽	
	Item Eligibility Issues 📈 🔽 Priority* Medium 🔽 Closure Code 🔽	
	Requester Information Activity SLA Work Info	
	Time Information	
	Source Phone Create Date	
	Call Type Assigned Time	
	Language Resolved Time	
	Attachments	
	File Name Max Size Attach Label	
	Attachment1 Attachment2	
	HCCCIIIICIRE	
	Save Close	
	antony.mosley dsmpqa.in.dc.g	ov //

Figure 19 – Activity tab





Incident Re	quest Informat	ion						
Summary*	Test Summary	Ask The Director	1					
Description*	Test Description	Email						
Category	Benefits	Fax	up Name		-	Status	New	-
Туре	Enrollment Form	IQ Phone	vidual+		-	Pending		-
ltem	Where to Mail	Referral	ority*	Medium	-	Closure Code		•
Requester Infor	mation Activity !	Requester U.S. Mail Walk-in		Time Informati	on			1
Source	Phone	(clear)	5	Create Date				
Call Type			-	Assigned Time				
Language			•	Resolved Time				
Attachment	\$			_ Submitted By	antony	.mosley		_
File Name	Max Size	Attach Label			· · · ·			
		Attachment1						
		Attachment2						

Figure 20 – Choose a Source and Call Type if necessary

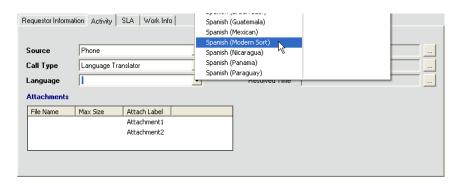
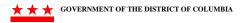


Figure 21 – Choose a Language if your requester uses an interpreter

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.



25						
Las a Service						
		Σ				
Requester Informa	ation Activity SL	A Work Info	·			
				Time Informati	on	
Source	Phone		-	Create Date	8/12/2008 11:38:40 PM	
Call Type			•	Assigned Time	8/12/2008 11:38:39 PM	
Language			-	Resolved Time		
Attachments				Submitted By	harini.gudisa	
File Name	Max Size A	ttach Label			j naini.guuisa	
	Add	ttachment1				
	Delete 😽	:tachment2				
	Display Save to Disk			J		

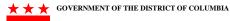
Figure 21 – Adding an attachment

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.



Datest Service Management a	35 Ja Servce		
Requester Informat	ion Activity SLA Work Info		
Add Work Info			Work Info History
Work Info Type	General 📃		Type Submit Date Submitter Source Summary
Source	Phone		General 8/12/2008 1 phyllis.njeru Other I may have to General 8/13/2008 5: antony.moste Phone Phone messa
Work Summary	Caller need information on new benefits		
File Name	File Size Attach Label Worklog At Worklog At Worklog At Worklog At	/	
	Add to Work Info History		View Entire Worklog View

Figure 22 – Adding your entry to the Work Info History

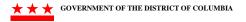
3.6 Service Level Agreements

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.

Requester Information Activity SLA Work I	nfo						
Service Level Agreements							
SVT Title		Hours	Min		Due Date/Time		Progress
DCHR-Service Target for Response Priority-Me	DCHR Request	8.00	0.00	0.00 USD			Met
DCHR Service Target For Resolution Priority-M	DCHR Request	16.00	0.00		8/14/2008 8:54:37	7 AM	In Process
Actions For SLA							
Title				Time to Occur		Status	
DCHR 100% Milestone For Resolution				8/14/2008 8:5	i4:37 AM	Active	

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)

My Conso	ole				
Search Cr	iteria				
Status	Assigned	-	Requester Type	Employee	-
My Groups	DCHR-Benefits	•	Search		
Case ID	⊽ Summary		Status	Priority	10
DCHR0000			New	Medium	[

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)

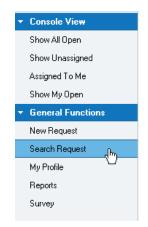


Figure 25 – Search Request link





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🔮 DCHR Service De	isk (Search)	in the second s
DC Department Of H	luman Resources - Service Desk	powered by DSMaaS
▶ Quick Links		
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▶ Other Consoles	Identification and Investigation and Resolution and Incident Closure Closed Recording Diagnosis Recovery	
	Incident Request Information Summary*	
	Description*	
	Category Group Name Status	
	Type Pending	
	Item Priority* Closure Code	
	Requester Information Activity SLA Work Info	
	Requester Type Company	
	First Name+ Site Organization	_ 💾
	Middle Name Site Department	_ 💾
	Last Name+ Site+	
	Phone Number Address Email Address Office	
		 ■ /ul>
	Create Modify Search Clear State City	
	Zip Code	
	2.0 Code	
	Close	
	antony.mosley	dsmpqa.in.dc.gov

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.





<u>Status</u>	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 <i>cannot</i> 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.

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DC Department Of H	uman Resources -	Service Desk			powered by DSMaaS
Quick Links		DCHR00000000547			
► Functions	Process Flow St	atus			
 Other Consoles 	Identification Recording	and Investigation and Reso Diagnosis	lution and very	Incident Closure Closed	
	Incident Reques	t Information			
	Summary* Ques	ions on eligibility			
	Description* More	questions regarding eligibility.			
	Category Benel	its 🗾 🗾 Group Name	DCHR-HR Answers	Status Assigned	•
	Type Civil 9	ervice Retirement System 💽 Individual+		Pending	•
	Item Gene	al Questions-Issues Priority*	Medium	Closure Code	•
	Requester Information	Activity SLA Work Info			
	Requester Type	Employee	Company	OCTO	
	First Name+	Antony	Site Organization	OCTO- Office of the Chief Technolog	w0 🔽
	Middle Name		Site Department	Remedy Services Group	
	Last Name+	Mosley	Site+	001- 441 4TH ST NW	_
	Phone Number	1 202 727-1631	Address		
	Email Address	antony.mosley@dc.gov	Office	1030	
	VIP	No	Country	United States	•
		Create Modify Search Clear	State	District of Columbia	•
			City	Washington	_ .
			Zip Code	20001	
	Save Close				
		Number 1 of 1		antony.mosley d	smpqa.in.dc.gov //

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.

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- 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

📑 Transfer Case to Ou	tside Service Desk (dsmpqa.dc.gov)	
Tr	ansfer Case to Outside Service Desk	
DCHR Case ID	DCHR0000000424	
Routing Group		
Summary	Test summary and more text.	
Description	test description and more text.	
Transfer Reason		
	Case Transfer Close	

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.





DC Department Of H	uman Resourc	ces - Service Desk						powered by
 Quick Links Functions Other Consoles 	Rece Incident Re Summary* Description* Category Type Item	ave Status by Status control of the status control of	enefits	Group Name Individual+ Priority=	DCHR-Benefits Antony Mosley Medium Vork Info History Type Submit Date General 18/28/2003 Resolution 18/28/2003	Submitter	g Code Source Sum Phone Itest Phone Call	mary View
	Save Close							

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)

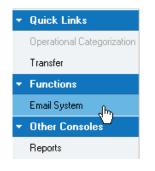


Figure 31 – Email System link



nc software					Help
nail System					
mail By Person Email Log					
People Search Criteria					
Company+ First Name+ Last Name+		Phone N	umber+		
Select Current Contact	Select Current Assignee	lear			
Search View					
First Name Middle	Name Last Name	A Login ID	Business Phone N	Number Internet E-mail	
		Olick to Retorch			
Email Information		Olick to Refresh			
Email Information	<u></u>	Dick to Refresh			
	 DCHR00000000419	Olick to Retresh		Insert Current Field	
Internet E-Mail*	 DCHR0000000419	Click to Refresh		Insert Current Field Into Email Messag	
Internet E-Mail* Email Subject Line*	 DCHR0000000419	Click to Floheush		Insert Current Field Into Email Messag Status Summary	
Internet E-Mail* Email Subject Line* Email Message Body*	 DCHR0000000419	Click to Retrievely		Inset Current Field Into Email Messag Status Summary Details	e Body
Internet E-Mail* Email Subject Line*	I DCHR0000000419 File Name File Size	Attach Label		Insert Current Field Into Email Messag Status Summary	e Body
Internet E-Mail" Email Subject Line" Email Message Body" Email Attachment				Inset Current Field Into Email Messag Status Summary Details	e Body

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.

