

Getting Started

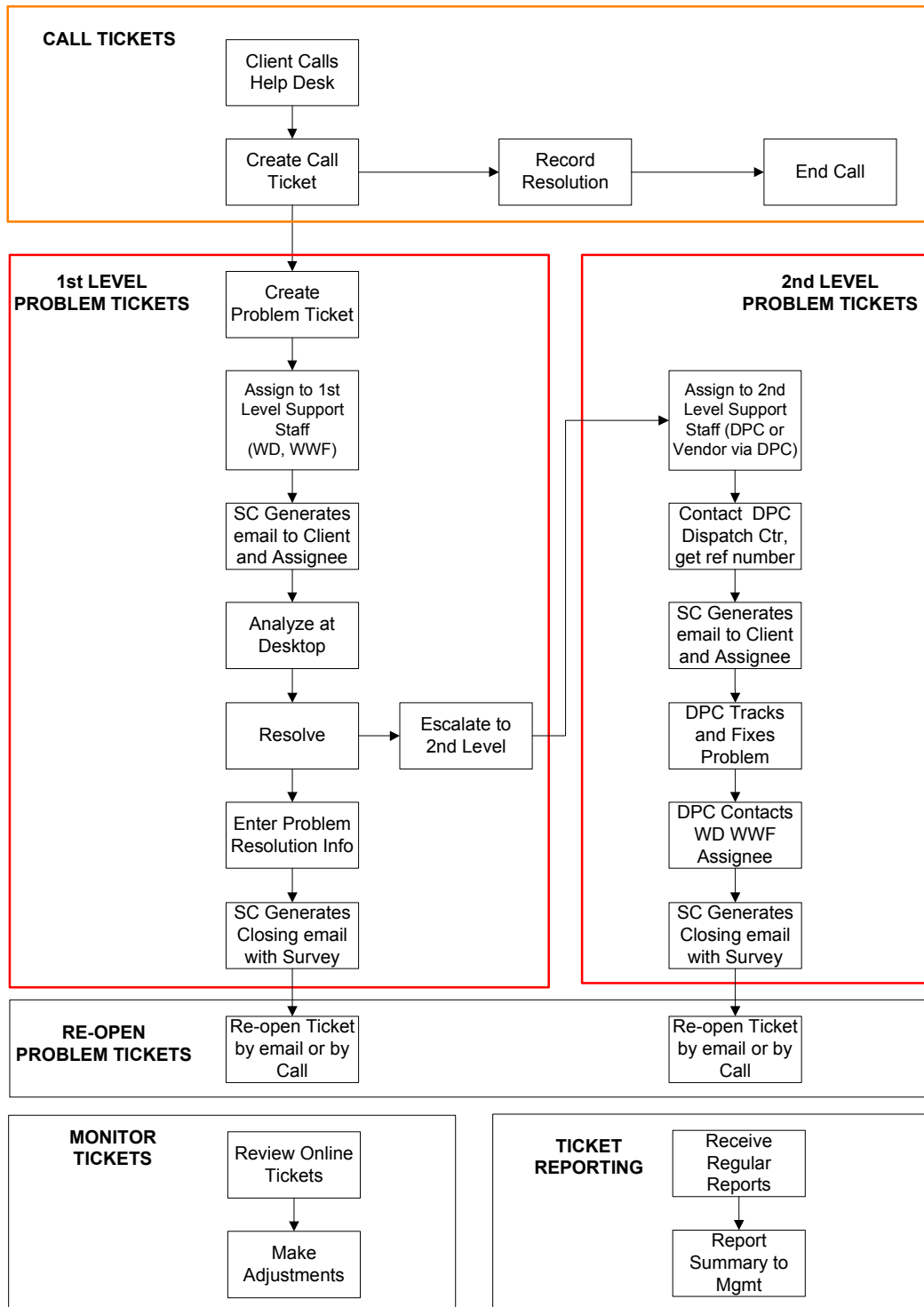
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Getting Started

ServiceCenter Process Flow



Getting Started

Roles and Responsibilities

The following terms are used throughout this document. It is possible for one individual to perform the tasks assigned to multiple roles. Each process is defined in a separate chapter. The responsibilities for each role, and the roles themselves, are identified within each process.

Roles

• **Call Taker**

The individual who makes the initial user contact. Generally, this will be by answering a call to the Help Desk, however, users may also submit support requests by email or by personally visiting the Help Desk.

The **Call Taker** is responsible for:

- practicing good customer service skills in gathering sufficient information about the user's problem to open a **Call Ticket**
- trying to fix the problem over the telephone – if possible
- creating a **Problem Ticket**, if necessary
- coordinating with **1st Level Support** regarding new or reassigned **Problem Tickets**
- monitoring the **Call Ticket** and **related Problem Tickets**, until the problem is resolved.

• **1st Level Support**

The City and SDDPC staff providing support to help resolve problems reported to the Water or WWF Help Desk. Responsibilities for 1st Level Support staff are detailed in the roles for Assignee and Secondary Assignee.

• **2nd Level Support**

This group provides specialized support to help resolve problems that have not been resolved at **1st Level Support**. This group typically consists of SDDPC LAN II or III staff; SDDPC Staff administering or maintaining applications, such as GroupWise, CADD, SWIM, TRIM, etc.; or Vendor staff.

Getting Started

Roles and Responsibilities (cont.)

- **Assignee**

The individual who is assigned the Problem Ticket. The **Assignee** is responsible for

 - **accepting** or **declining** Problem Ticket Assignments
 - **resolving** the user's problem
 - maintaining good **communication** with the user. The **Assignee** must keep the user aware of the status of the problem if the problem is not easily fixed
 - updating the **Problem Ticket** in ServiceCenter at least daily unless unusual case, such as waiting on parts, etc.
 - updating inventory if equipment is added, moved, or tanked
 - escalating unresolved **Problem Tickets** to 2nd Level Support
 - contacting the **Dispatch Center** when escalating a **Problem Ticket** to **2nd Level Support**
 - entering accurate and complete resolution information on **Problem Tickets**, even if the problem is escalated to 2nd Level Support

The **Assignee** retains responsibility for the **Problem Ticket** until resolved, even if the problem is escalated to 2nd Level Support.

The term "Assignee" includes the **Secondary Assignee** who has accepted a **1st Level Support** ticket.

- **Secondary Assignee**

The individual, typically an application or other specialist, who receives a reassigned Problem Ticket. The Secondary Assignee becomes the Assignee within ServiceCenter and is now responsible for everything listed for Assignee. In addition, the **Secondary Assignee** supercedes the **Primary Assignee** as **owner** of the Problem Ticket.

Getting Started

Roles and Responsibilities (cont.)

- **Help Desk Lead**

The **Help Desk Lead** is responsible for additional Help Desk activities including:

 - checking emails for new user problems,
 - monitoring open Call and Problem Tickets
 - resolving Problem Ticket assignment issues
 - escalating customer service complaints or other issues to the Help Desk Supervisor
 - reviewing open tickets created by the **SDDPC Dispatch Center** each morning and adding new Call or Problem Tickets not yet entered into ServiceCenter
 - responsible for all Call Tickets entered using the generic **water.helpdesk** or **wwf.helpdesk** logins

- **Help Desk Supervisor**

The individual who supervise the 1st Level Support staff. This individual may be either a City or SDDPC supervisor. The Help Desk Supervisor is responsible for:

 - providing trained 1st Level Support or Help Desk staff to resolve problems
 - working with the Help Desk Lead, or other City or SDDPC supervisors to resolve escalated issues
 - addressing complaints reported by end users & City Staff

- **Dispatch Center**

This group of SDDPC specialists serves as the control point between **1st Level Support** and **2nd Level Support** for **Problem Tickets** that have been escalated. This group also provides problem tracking using **SAP**, with cross-referenced **Problem Ticket** numbers in both **SAP** and ServiceCenter.

Getting Started

Start Service Center

Desktop GUI Client

To use the desktop GUI Client version, double-click on the ServiceCenter icon. The following window will open to allow you to login, or configure your ServiceCenter printer.



ServiceCenter Login



Getting Started

Start Service Center (cont.)

Desktop GUI Client (cont.)

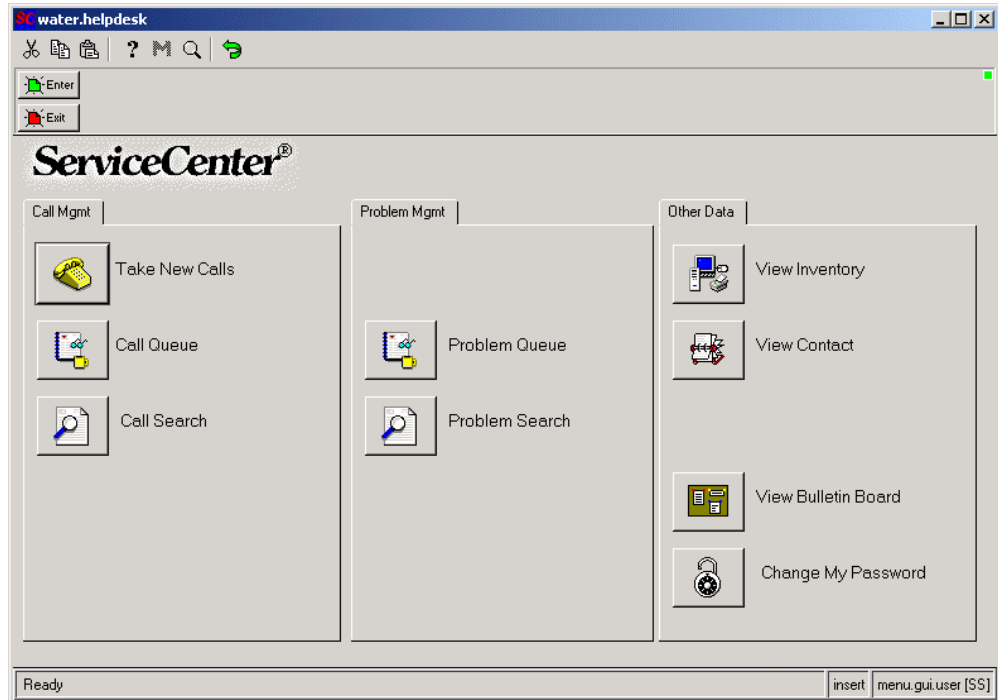
After you have completed your work, be sure to exit ServiceCenter by clicking on the **Exit** button.



ServiceCenter Main window



• Logging Out



Getting Started

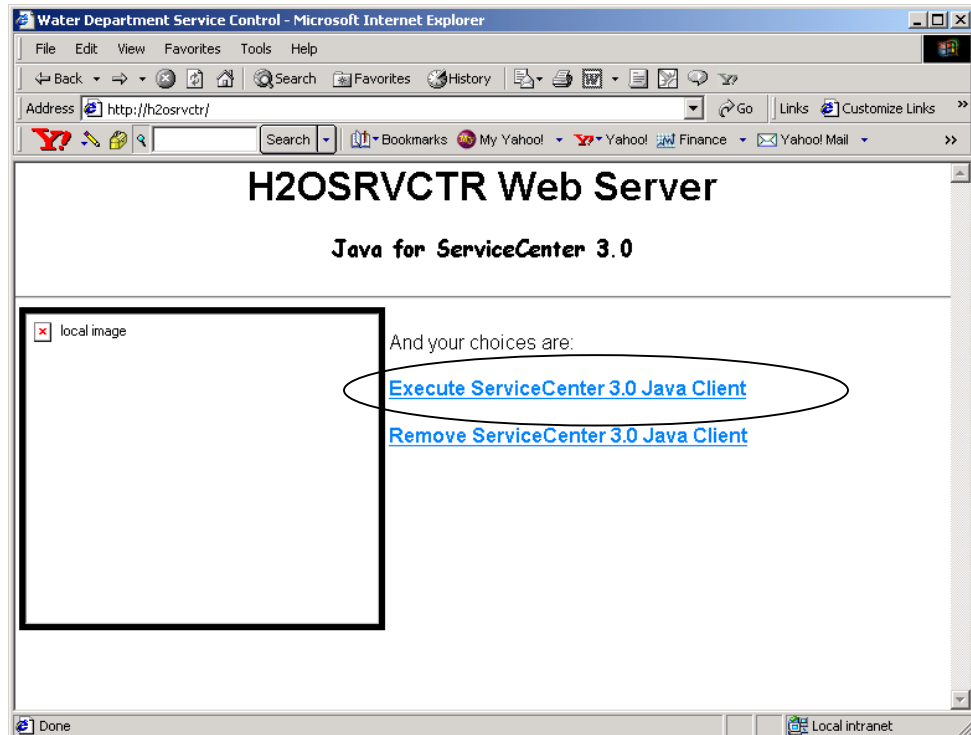
Start Service Center (cont.)

Browser Based Java Client

ServiceCenter can be accessed from any computer with a web browser via the java client. Open the web browser, type “h2osrvctr” in the address bar, and press enter. When the *Browser Interface to ServiceCenter* screen displays, execute ServiceCenter. *If the java client has never been run before, it will automatically install.*

Using this java client, Help Desk Support staff can easily update Service Center, including updates to inventory, adding notes to open problem tickets, and closing problem tickets.

Browser Interface to ServiceCenter



Tip:

Use this interface to manage tickets from any PC.

Click the link to *Execute ServiceCenter 3.0 Java Client* to enter Service Center.

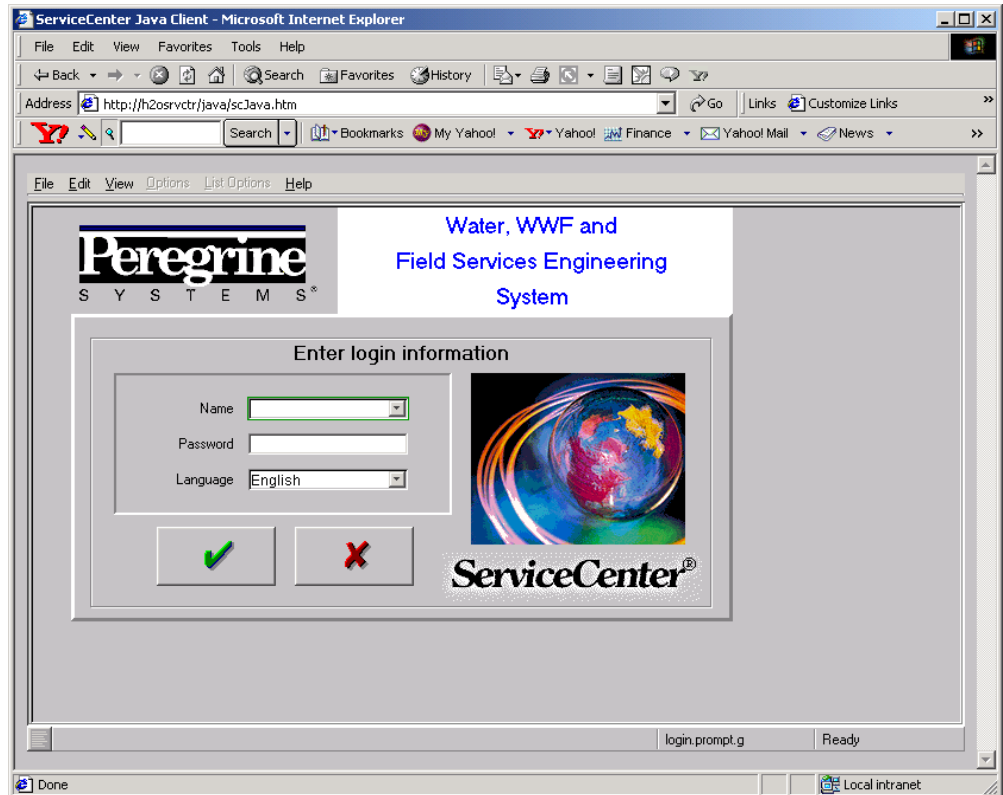
Getting Started

Start Service Center (cont.)

Browser Based Java Client (cont.)

The *ServiceCenter Login* screen will require that you enter your ID and password:

Browser-based ServiceCenter Login



Getting Started

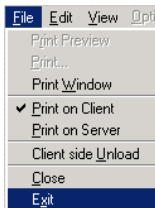
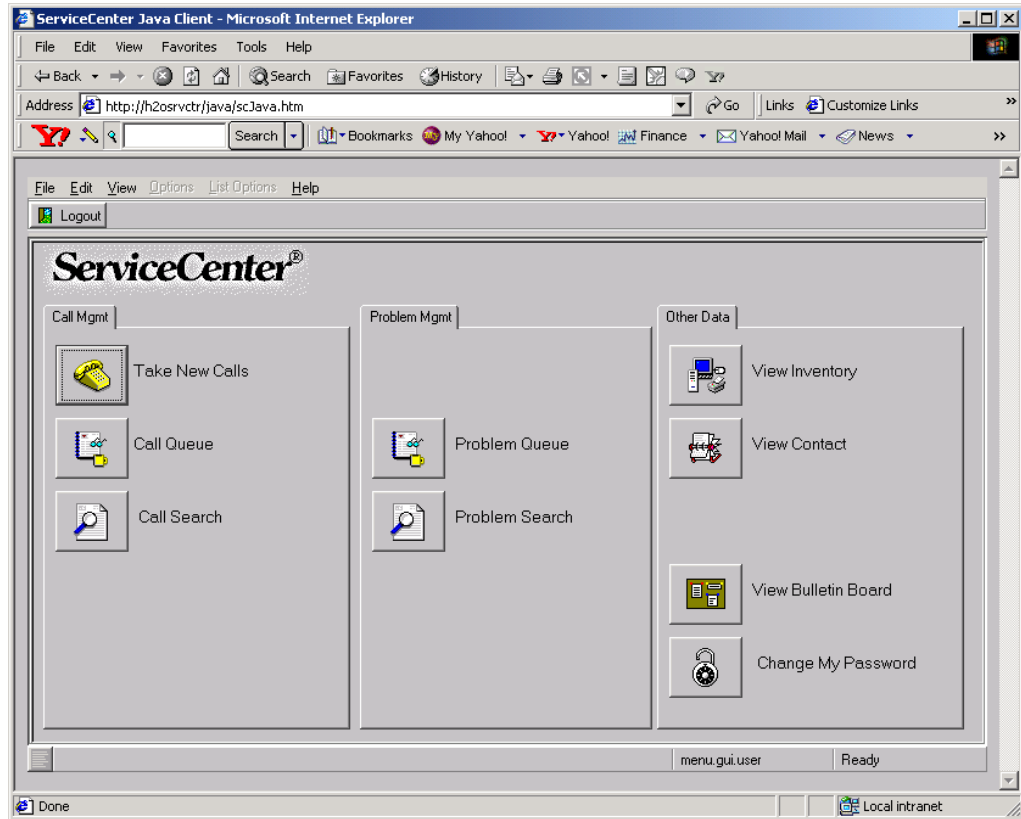
Start Service Center (cont.)

**Browser
Based
Java
Client
(cont.)**

After you have completed your work, be sure to exit ServiceCenter by clicking on the **Logout** button.



• **Logging
Out**



You may also exit by clicking on the **File Menu** and choosing **Exit**.

Getting Started

Logging In

This document will describe instructions for using ServiceCenter with Desktop GUI client. Support Staff can also use Service Center from any location with the browser-based java client. However, if they do so, they should be aware that the two clients are presently slightly different.

To log in, enter your name and password and press “Enter.”

Enter Your User ID

- 1 The **Name** field is “case-sensitive” and will automatically complete the rest of your name if it is included in the login list.
 - Type in your personal login name, or select it from the “drop-down” menu.
 - If you are an intern or temporary (or contract) worker, use the **water.helpdesk** or **wwf.helpdesk** logins, as appropriate.
 - If you do not have a personal login, or need a password, contact the Help Desk Lead.
- 2 The password is case-sensitive. You may not use any special characters in your password.

Ticket Ownership

Be aware that the login Name used to create **Call Tickets** will also be responsible for monitoring the tickets – until the **Call Tickets** are closed.

DO NOT CLOSE CALL TICKETS once they are related to **Problem Tickets**. Escalated **Call Tickets** must remain open. You are still responsible for them until the **Problem Ticket** is closed. All associated **Call Tickets** will be closed automatically by ServiceCenter when their **related Problem Tickets** are closed.

Call Tickets opened by the **water.helpdesk** and **wwf.helpdesk** users are the responsibility of the Help Desk Lead.



Caution

Problem Tickets remain the responsibility of the **Assignee** until the problem is resolved, or the **Problem Ticket** is reassigned to someone else.

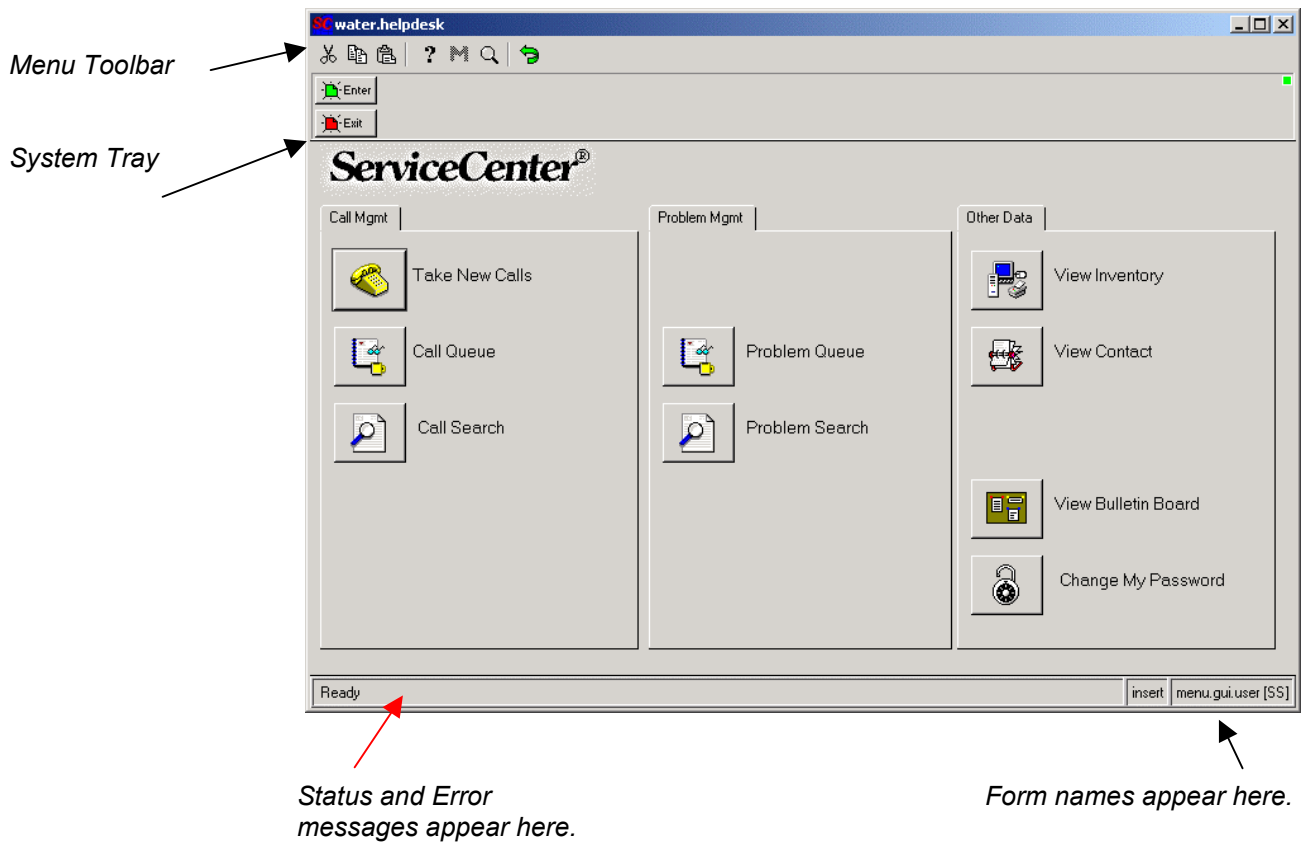
Call Tickets remain the responsibility of the **Call Taker** and must remain open until the **associated Problem Ticket(s)** are resolved and closed. The **Call Taker** is also responsible for **monitoring** the status of **related Problem Tickets**.

Getting Started

Service Center Window

ServiceCenter windows containing forms—such as the form referred to as the *ServiceCenter Home* menu—are displayed in a ServiceCenter main window. The appearance and capabilities of your Home menu may vary, depending on how the ServiceCenter administrator has defined you as a user.

ServiceCenter Home Menu



Getting Started

Using the menus, toolbar, and buttons

The *Main ServiceCenter* window contains a menu bar. Each menu, except Options and List Options, has the same choices in each form. The choices in the Options and List Options menu vary from form to form.

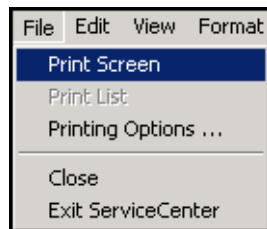
The ServiceCenter tool bar is located at the top of each form. The tool bar provides shortcut buttons for choosing some of the menu options. Click on the button to take the action represented by the equivalent menu option.

Many ServiceCenter forms also contain tabs. Tabs allow quick access to other applications or a set of grouped fields, which eliminates the need to open additional forms.

File Menu

The File menu contains these options:

- **Print Screen**



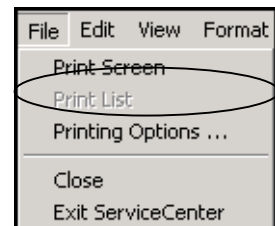
This option allows the current window to be printed to any local or networked printer. The **Print** dialog box opens to allow a choice of available printers.

Only the *current window* can be printed using this menu choice.

- **Print List**

This option is only available if an inbox or a Record List is displayed.

The list is printed to the user's default ServiceCenter printer.

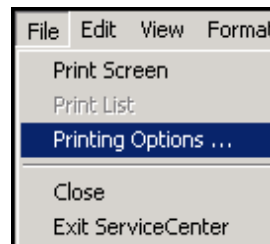


Getting Started

Using the menus, toolbar, and buttons (cont.)

File Menu (cont.)

This option allows you to configure ServiceCenter printing. Selecting this option displays the following menu:



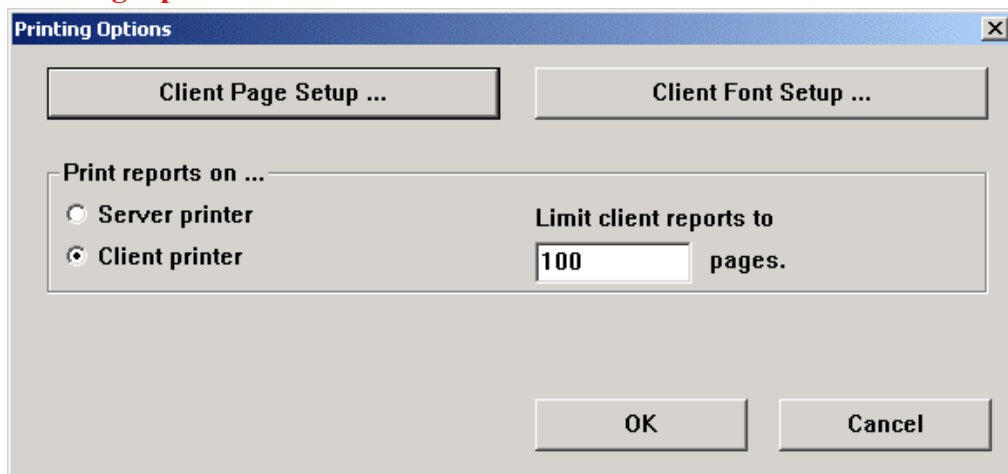
Printing Options

- Print Options

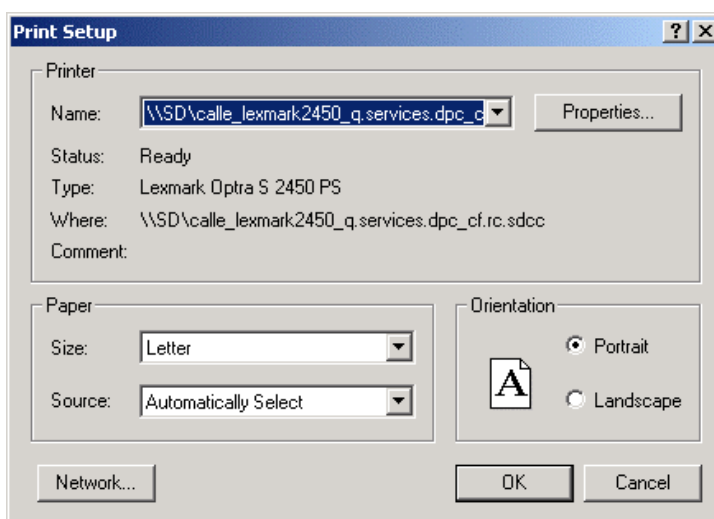


Tip

Always select **Client printer**.



- Client Page Setup



Access the dialog box to select and configure a printer.

Select Landscape Orientation for Print Screen.

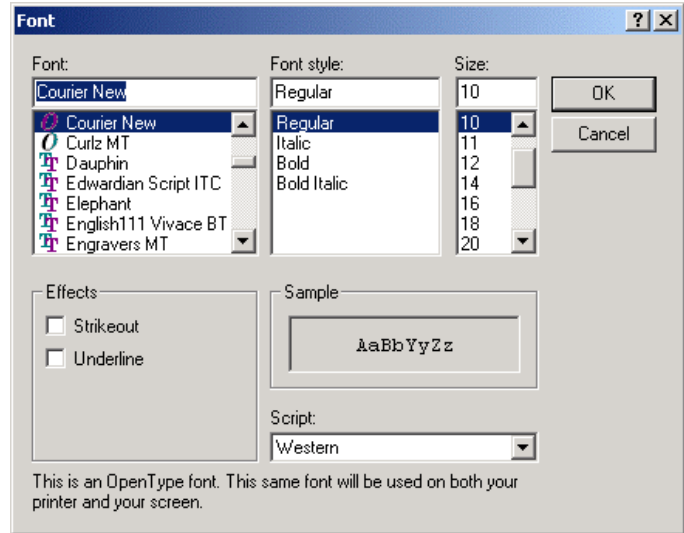
Getting Started

Using the menus, toolbar, and buttons (cont.)

File Menu (cont.)

- **Client Font Setup**

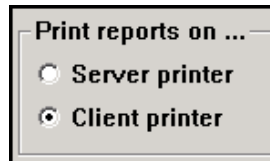
Access the dialog box to select a font to be used when ServiceCenter prints a record.



- **Print reports on...**

This section of the window allows you to select where ServiceCenter reports are spooled for printing. The default is the server printer. You can change this setting from any ServiceCenter form. Pressing **Ctrl+Shift P** will toggle between the two settings.

- **Print on Client**



A **Ⓞ** is visible beside the **Client printer** option when you have chosen to have ServiceCenter print jobs to a local or network printer.



Tip

Always select Client printer.

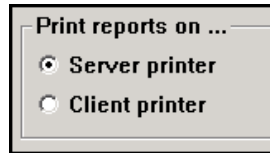
Selecting the client printer option ensures that reports, or screen prints, are sent to a printer connected to the client – locally or across the network. This option provides foreground printing of screen prints and reports under the configured page limit in length.

A **[P]** is displayed in the right corner of the Status bar of a form if the client printer is chosen.

Getting Started

Using the menus, toolbar, and buttons (cont.)

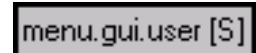
File Menu (cont.)



A is visible beside the **Server printer** option when you have chosen to have ServiceCenter print jobs print to a default server as background tasks.

- **Print on Server**

A **[S]** is displayed in the right corner of the Status bar of a form *whenever* the server printer is chosen.



Caution

Do NOT select **Server printer** because no printers are connected to the server.

- **Limit client reports to <N> pages**

Sets the limit of report data sent from a ServiceCenter server to a client. Reports printed from a client are downloaded from the server. Some are lengthy, which prolongs the download time.



- **Close**

Closes the current form. If the form is your starting ServiceCenter point, you are taken to the exit form to log out of ServiceCenter.

- **Exit Service Center**

Logs you out of the current ServiceCenter session.

When using the GUI Client, you can also use the **Exit** button to exit ServiceCenter from the main ServiceCenter window.



If using the Browser-based Java Client, you can use the **Logout** button.



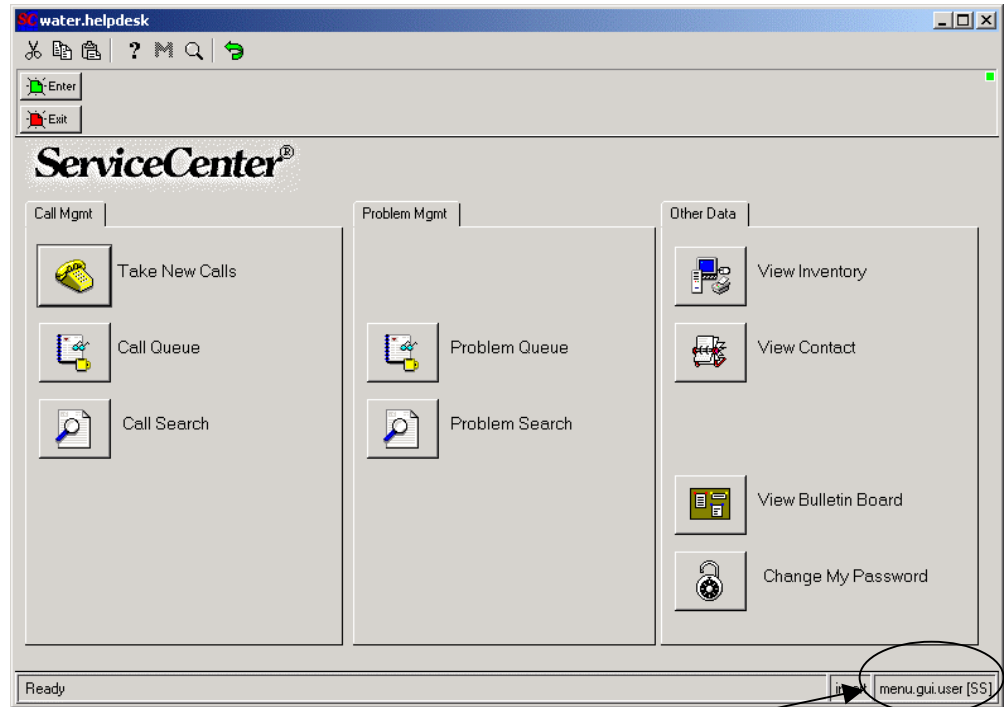
The **Exit** button is also available on all GUI Client windows and allows you to exit from your current activity and return to your previous window.

Getting Started

Main Menu Choices

Once you have successfully logged into ServiceCenter, you can select what you need to do by simply clicking on the appropriate button.

Main ServiceCenter window



The name of the active ServiceCenter form is displayed here.

Getting Started

System Messages

ServiceCenter helps you keep track of your work by displaying messages to help you. These messages notify you of successful completions of individual tasks, errors generated while attempting to complete a task, and messages to help you identify which ServiceCenter screen or window you are presently using.

Call Ticket Window

Call ID: []
User ID: [HID]
Reported By: [JAMES] [DORMAN]
Phone / Ext.: [858-503-7271]
Home Location: []
Current Location: [CALLE FORTUNADA]
Bldg-Floor/ Room: [MAIN BLDG]
Asset ID: [31040]

Status: [Open - Idle]
Priority: [1 - Priority One]
Owner: [Water Helpdesk User]
Helpdesk: [WATER]
Notify By: [EMAIL]

Description: [Runs too slow since Visio 2002 was installed. (test ticket for screen grabs)]
Call Resolution: []

Status Bar: Ready | insert | cc:incquick.wvf.g [P]

Status Bar



SC Feature

The **Status Bar** provides valuable help and information.

Status message

Insert/Overwrite status identification

Current form name

Printer identification



To learn **more** about an **error message**, click on the **M** key. This key will display more details about the error.

Getting Started

System Messages (cont.)

As you work with various ServiceCenter forms, such as the **Call Ticket** form below, you can monitor ServiceCenter activity by reviewing the system messages that are displayed on the **Status Bar**.



Tip

Click the **M** key to learn more about error messages.

Call Ticket Window

The screenshot shows the ServiceCenter application window. The toolbar contains icons for Cancel, Undo, Open, Last Call, Close, Find, Fill, and Clone. The 'M' icon is circled in red. The form fields include Call ID, User ID, Reported By, Phone / Ext., Home Location, Current Location, Bldg-Floor/ Room, and Asset ID. On the right, there are dropdown menus for Status (Open - Idle), Priority (1 - Priority One), Owner (Water Helpdesk User), Helpdesk (WATER), and Notify By (EMAIL). The bottom Status Bar displays the message 'Call CALL005933 has been closed.' circled in red.

Status Bar



SC Feature

The **Status Bar** provides valuable help and information.

The **Status Bar** displays error, alert, or warning messages.

The screenshot shows the Status Bar displaying the message 'Call CALL005916 has been saved.' circled in red.



Caution

SAVE IT or LOSE IT!

When creating or updating tickets, be sure to save your work often. ServiceCenter will automatically "timeout" after 15 minutes and any changes that remain unsaved will be lost.

Getting Started

Response Times

Response Event	Standard	Urgent	Comments
Call Taker creates new Call Ticket or updates existing Call Ticket after receiving request by telephone	1 – 15 minutes	1 – 15 minutes	Timer starts when notification is received. Substitute 4 hours for requests received via email. Urgent requests should not be reported via email.
Call Taker creates new Problem Ticket or links Call Ticket to existing Problem Ticket	1 – 15 minutes	1 – 15 minutes	Timer starts when notification is received. Substitute 4 hours for requests received via email.
Call Taker notifies Assignee of Problem Ticket Assignment via cell phone, pager or telephone	1 – 15 minutes	1 – 5 minutes	Timer starts when Problem Ticket has been created.
Assignee accepts or declines Problem Ticket assignment	1- 30 minutes	1- 15 minutes	Timer starts when Assignee receives assignment notification via cell phone, pager or telephone.
Assignee contacts user and schedules visit, as needed	15 – 30 minutes	1 – 15 minutes	Timer starts when Assignee notifies Help Desk that assignment has been accepted.
Contact SDDPC Dispatch Center and escalate unresolved Problem Ticket to 2 nd Level Support	8 hours	1 - 4 hours	Timer starts when Problem Ticket is created.
Update Problem Ticket status in ServiceCenter	Daily	4 – 8 hour intervals	Timer starts when Problem Ticket is created.
Resolve problem tickets or escalate to 2 nd level support	8 hours	4 - 8 hours	Timer starts when Problem Ticket is created.
Monitor open Call Tickets and related Problem Tickets	Daily	Daily	Timer starts when Call and Problem Tickets are created.

The Water and WWF Help Desks are expected to perform within 90 – 95% compliance for all reported issues. 5 – 10% of issues are anticipated exceptions where a problem or service request extends beyond 24 hours. SDDPC management will monitor and supervise SDDPC staff. City management will monitor and supervise City staff.

Getting Started

Help Desk Hours

Office Hours

Water – (619) 533-4225

Help Desk is available from 7:00 a.m. to 5:00 p.m. – Monday through Friday.

WWF – (619) 533-6900

Help Desk is available from 7:30 a.m. to 4:30 p.m. – Monday through Friday.

To provide maximum customer support, the Water and WWF Help Desks provide cross-coverage for each other. This policy ensures that no Help Desk is “unattended” during normal support hours.

Both Help Desks can answer calls for one another. Whenever a Help Desk must be left unattended, all the incoming calls are answered by one Help Desk until the unattended Help Desk can again be attended.



Caution

When covering for another Help Desk, be sure to open a new session of ServiceCenter and login using the generic **water.helpdesk** or **wwf.helpdesk** users. Then create all **Call Tickets** for their users using the new session and the generic **User ID** for that Help Desk. This practice will enable user problems to be separately tracked for the two respective Help Desks.

After Hours

Dispatch Center – (858) 581-9900

If users experience problems outside of the regular office hours, then they should contact the **SDDPC Dispatch Center** for assistance, if possible.

Each morning, the Help Desk Lead will compare open Dispatch Center calls with ServiceCenter to ensure that calls opened by the Dispatch Center are also accounted for in ServiceCenter.

Users may also request “**non-emergency**” support via email at any time by sending **GroupWise email** to:

Water – Help_Desk Water_Help_Desk

WWF – Help_Desk WWF_Help_Desk