iNeed – Service Desk Agent Quick Guide

How-to Quick Guide

Purpose: The purpose of this document is to provide a service desk agent (tier 1) managing iNeed service requests with step-by-step guidance to complete common operational tasks.

Prerequisite:

- The agent already has the proper permissions in iNeed.
- The agent owns and manages the service request, including logging, categorisation, escalation, communication with clients and resolution.

Acronyms:

Acronym	Meaning
PDQ	Pre-defined Query
POC	Point of Contact
RB	Reported By
RF	Requested For
SPOC	Single Point of Contact
SR	Service Request
WO	Work Order

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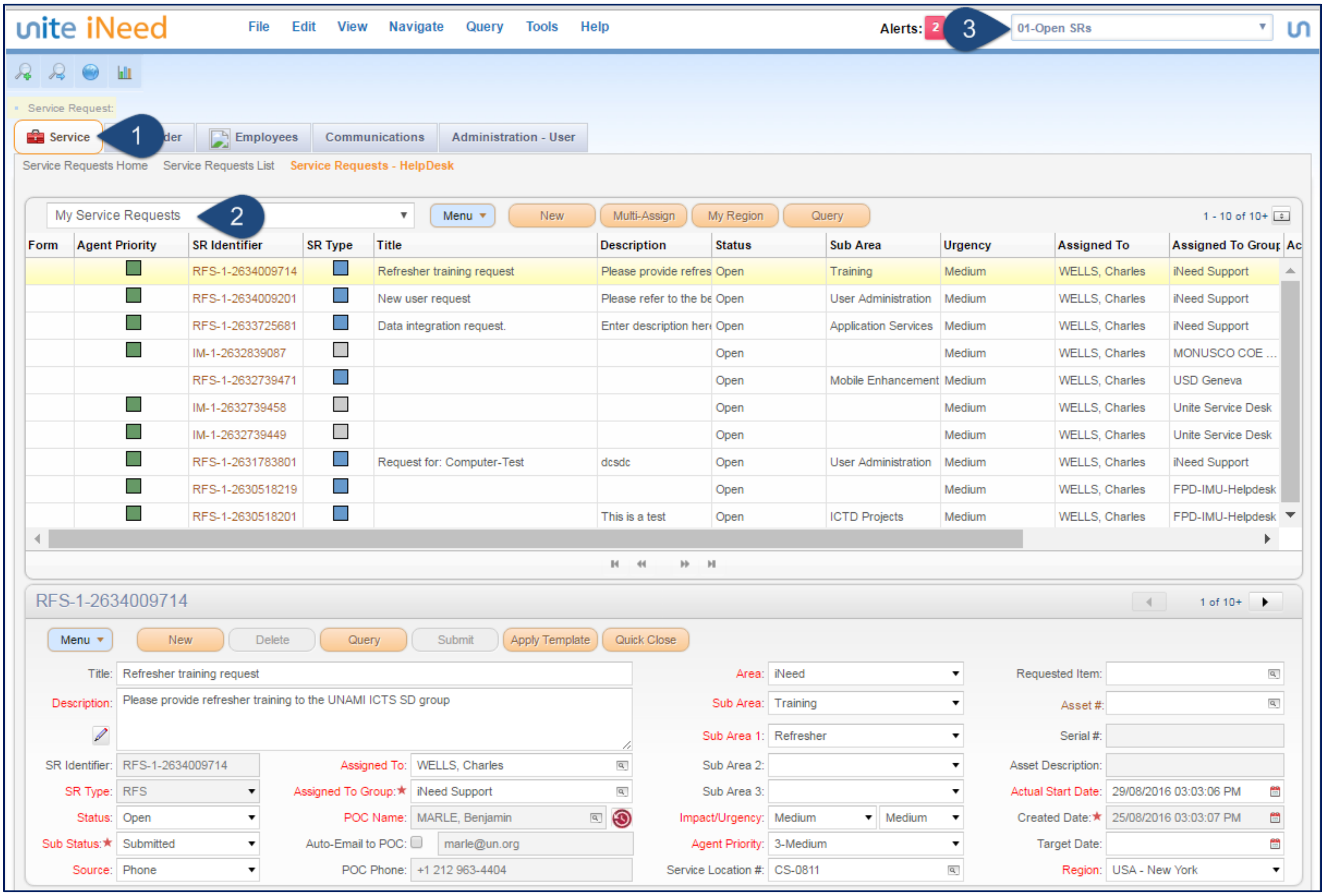
1. Finding service requests (SRs) assigned to you

- Click on the Service tab along the top of the application interface 1. You will be taken to the service request screen.
- By default, you will see SRs that are assigned to you based on the **My Service Requests** selection in the visibility drop-down menu 2.
- By default, it shows you open SRs via the **01-Open SRs** pre-defined query (PDQ) 3.



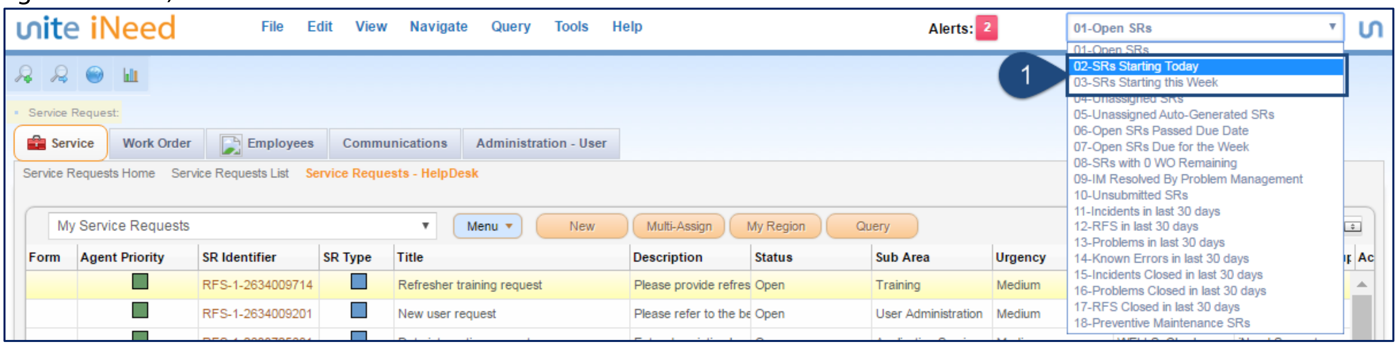
- The bottom half of the screen (**Service Request Details**) shows you the details of the currently selected SR.

2. Checking for service requests that were created or should be taken care of today or in the coming week

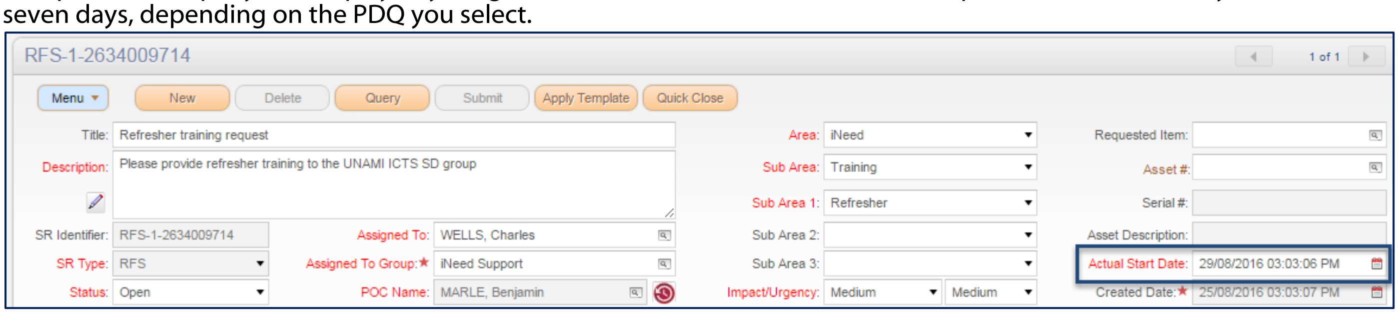
You can check to see what service requests were created today or have a start date set for today (or within the week).

Usually, the start and creation dates are the same, but the start date can be updated. This may happen, for example, if you need to change it to accommodate the customer's schedule.

- Change the PDQ drop-down menu to **02-Open SRs Starting Today** or **03-Open SRs Starting for the Week** 1 (top right of screen).



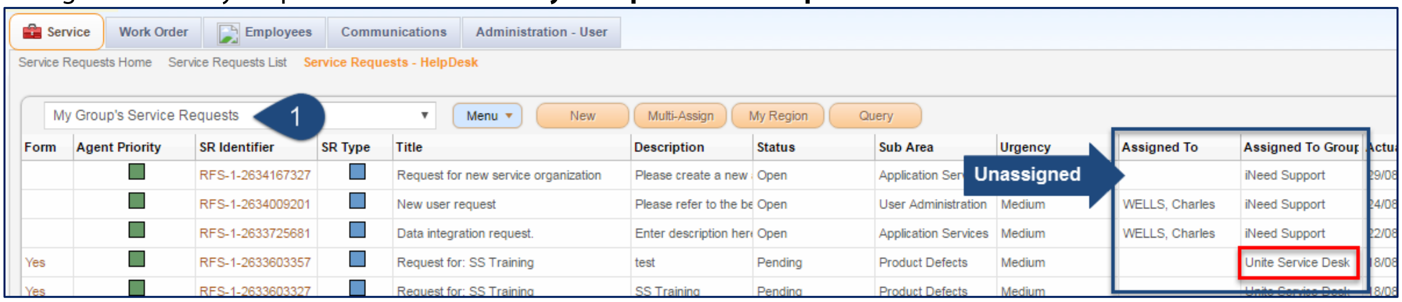
- This predefined query will display anything that has an **Actual Start Date** value equal to sometime today or in the next seven days, depending on the PDQ you select.



3. Finding service requests assigned to your primary group

All users in iNeed have a primary group for which they do work. This usually is the group that handles requests related to the agent's primary job function (in your case this is most likely the service desk).

- Change the visibility drop-down menu 1 to **My Group's Service Requests**.



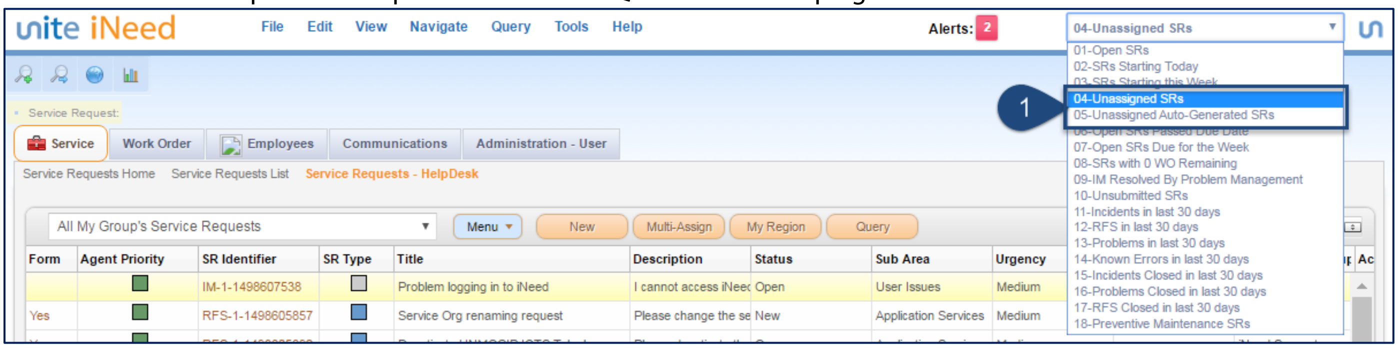
- The list changes to show SRs that are assigned to your primary group, including ones assigned to you, your colleagues, and SRs that are still unassigned.

Note: *You may see SRs that are assigned to another group (see red outline in screenshot). A service request will be referenced this way if a work order was assigned to your group under this SR. It will appear as read-only unless you also happen to be part of the SR owner group.*

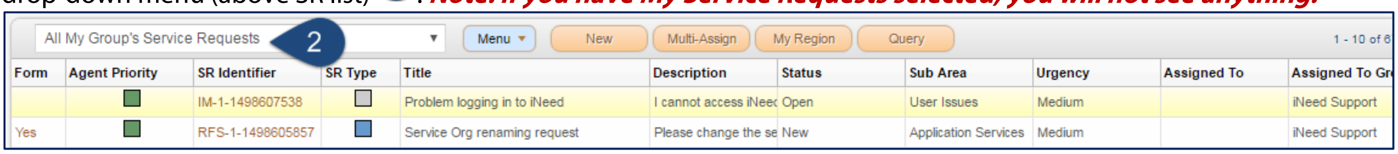
4. Checking for unassigned service requests

If you are responsible for managing the service request queue, you will need to check for any service requests that are currently unassigned.

- Select one of the two predefined queries from the PDQ menu on the top right of the screen 1.



- Make sure you either have **My Group's Service Requests** or **All My Groups' Service Requests** selected in the visibility drop-down menu (above SR list) 2. ***Note: If you have My Service Requests selected, you will not see anything!***

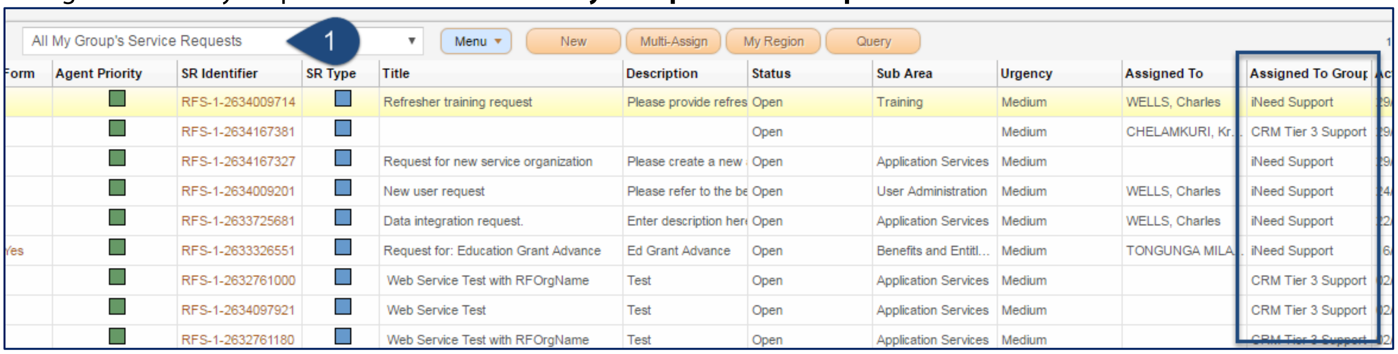


5. Finding service requests assigned to all groups you are a member of (optional)

Some agents are part of more than one group, depending on their work responsibilities.

Example: Somebody that works for the ICT Service Desk may also be part of the Tier 2 desk-side support team.

- Change the visibility drop-down menu 1 to **All My Group's Service Requests**.



Form	Agent Priority	SR Identifier	SR Type	Title	Description	Status	Sub Area	Urgency	Assigned To	Assigned To Group
		RFS-1-2634009714		Refresher training request	Please provide refres	Open	Training	Medium	WELLS, Charles	iNeed Support
		RFS-1-2634167381				Open		Medium	CHELAMKURI, Kr...	CRM Tier 3 Support
		RFS-1-2634167327		Request for new service organization	Please create a new	Open	Application Services	Medium		iNeed Support
		RFS-1-2634009201		New user request	Please refer to the be	Open	User Administration	Medium	WELLS, Charles	iNeed Support
		RFS-1-2633725681		Data integration request.	Enter description here	Open	Application Services	Medium	WELLS, Charles	iNeed Support
Yes		RFS-1-2633326551		Request for: Education Grant Advance	Ed Grant Advance	Open	Benefits and Entitl...	Medium	TONGUNGA MILA...	iNeed Support
		RFS-1-2632761000		Web Service Test with RFOrgName	Test	Open	Application Services	Medium		CRM Tier 3 Support
		RFS-1-2634097921		Web Service Test	Test	Open	Application Services	Medium		CRM Tier 3 Support
		RFS-1-2632761180		Web Service Test with RFOrgName	Test	Open	Application Services	Medium		CRM Tier 3 Support

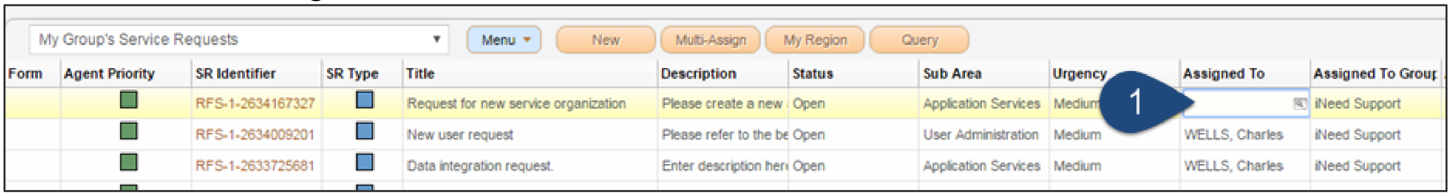
- The list changes to show SRs that are assigned to all of your groups (in this screenshot *iNeed Support*, *CRM Tier 3 Support*, and *eCOE Support*), including ones assigned to you, your colleagues, and SRs that are still unassigned.

6. Assigning a service request to yourself/someone else

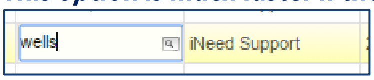
You can assign an SR to yourself or another team member.

Note: The SR must be already submitted.

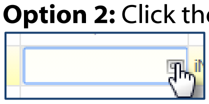
- Click on the blank **Assigned To** field 1.



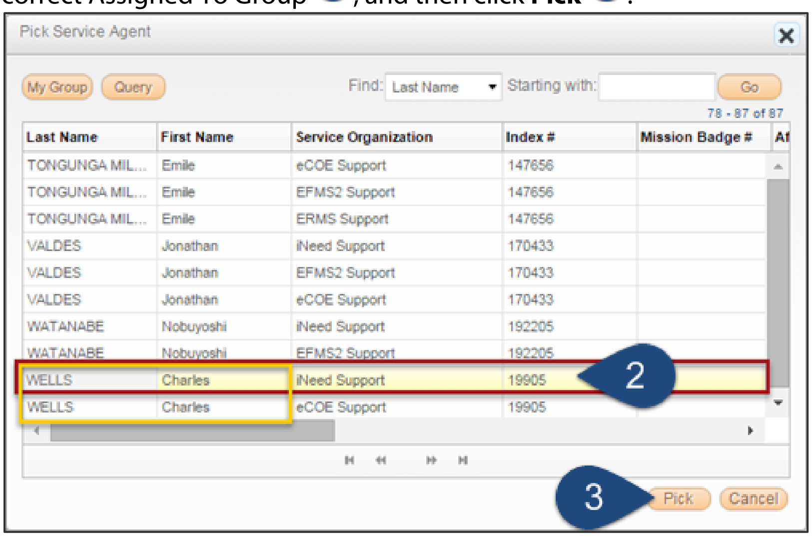
- You have <u>two options</u> of how to proceed:
    a. **Option 1:** Type the agent's last name or index number into the field and tab away to let the system resolve it for you.
    This option is much faster if there are many team members since it avoids you having to look in a list.



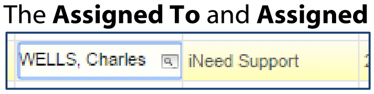
    b. **Option 2:** Click the lookup (picklist) icon to open the agent list pop-up.



- If the agent is part of more than one team, their name will appear multiple times. Select the entry that is linked to the correct Assigned To Group 2, and then click **Pick** 3.



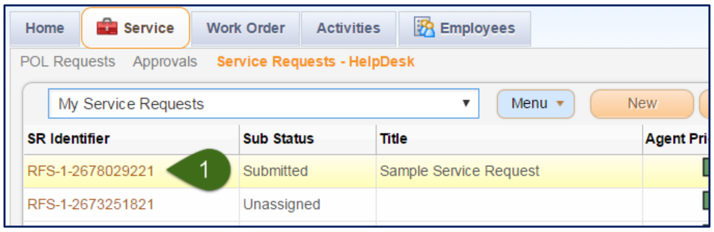
- The **Assigned To** and **Assigned To Group** fields will reflect your choice.



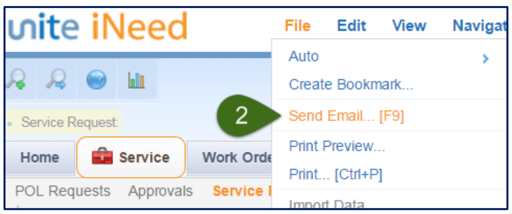
7. Emailing the customer

There may be cases when you need to communicate with the client receiving the service. The email should be sent directly from iNeed, not Lotus Notes. This allows for the email and any replies to be tracked by the system.

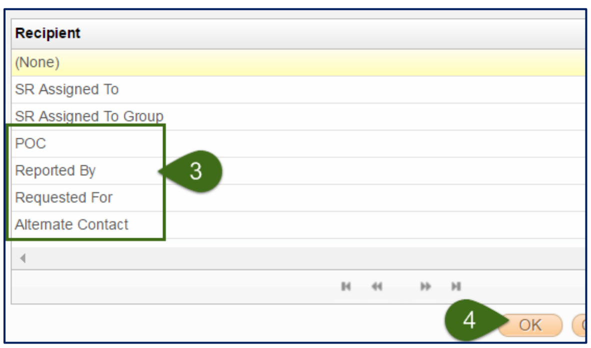
- Drill down into the Service Request 1.



- Click **File → Send Email… [F9]** or press F9 on your keyboard 2.



- Select **SR Requested For** 3 and click **OK** 4.

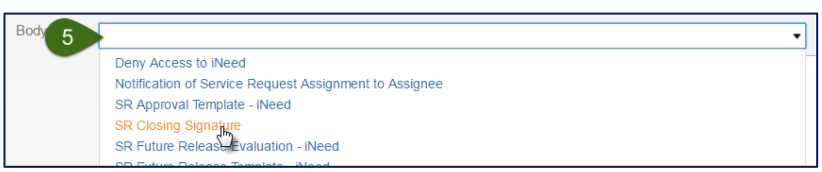


You have four entries related to the customer(s):

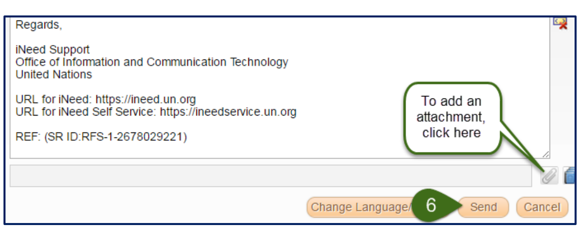
- **POC**: Point of contact for the SR (can be RB or RF)
- **Reported By**: Person who contacted the SD
- **Requested For**: Person whom the service is being requested for
- **Alternate Contact**: If the SR has alternate contact details, select this entry to send to this address

- You can also select **(None)** to leave the address field blank

- Select the appropriate email template from the **Body** drop-down menu 5. If there is no appropriate template, select the **SR Closing Signature** block to add the signature block and SR reference number.



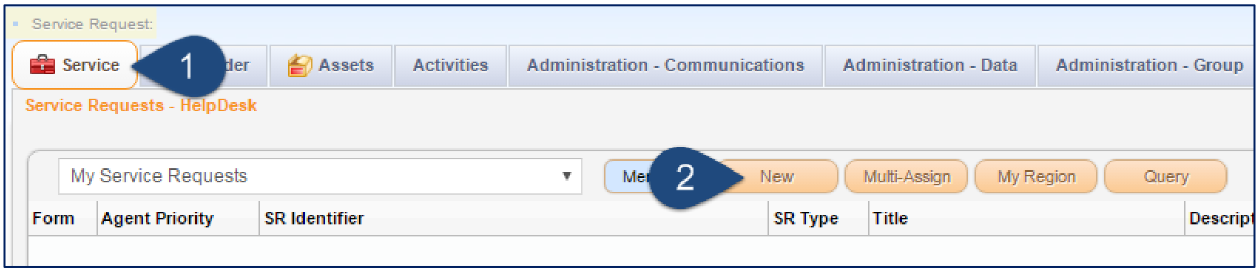
- Make any necessary changes and click **Send** 6. You can also add an attachment via the icon. Once sent, the email will appear as an activity in your service request.



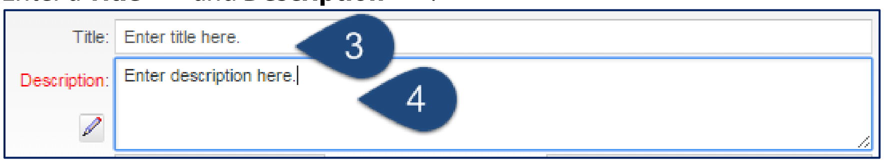
8. Creating a manual service request

This section shows how to create a simple manual service request.

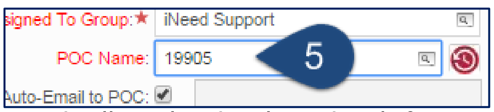
- Click on the **Service** 1 tab, then **New** 2.



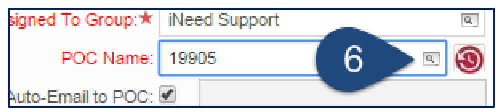
- Enter a **Title** 3 and **Description** 4.



- Enter the last name or index number in **POC Name** 5. You can also click on the icon to search for a client 6.

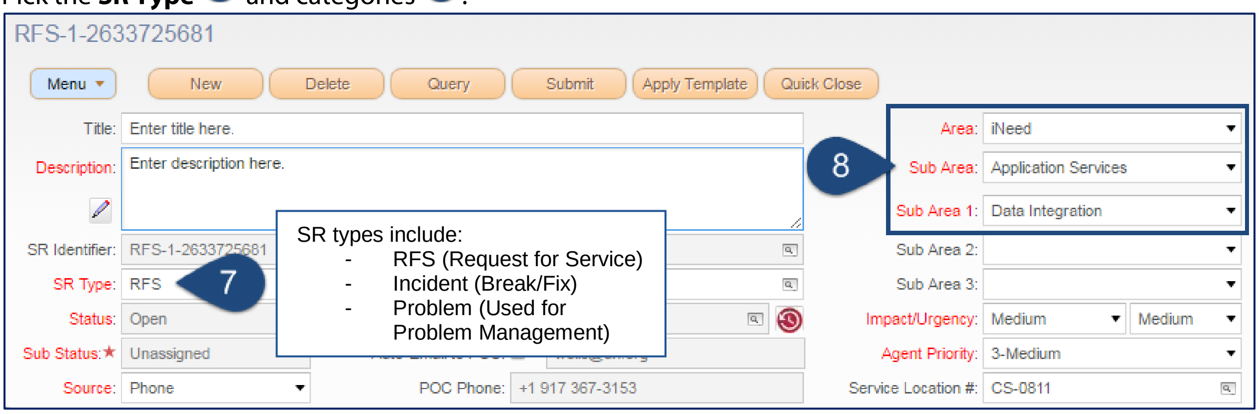


OR



iNeed will resolve the client details for you automatically.

- Pick the **SR Type** 7 and categories 8.

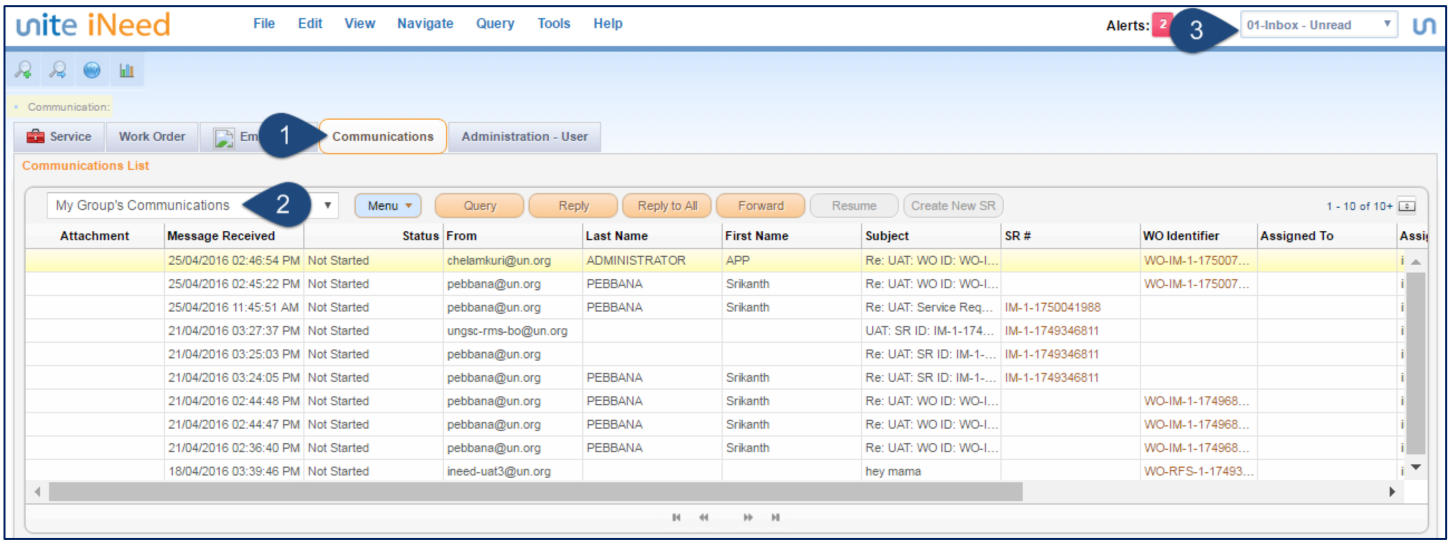


- Click **Submit** 9 to finish the process.

9. Monitoring emails

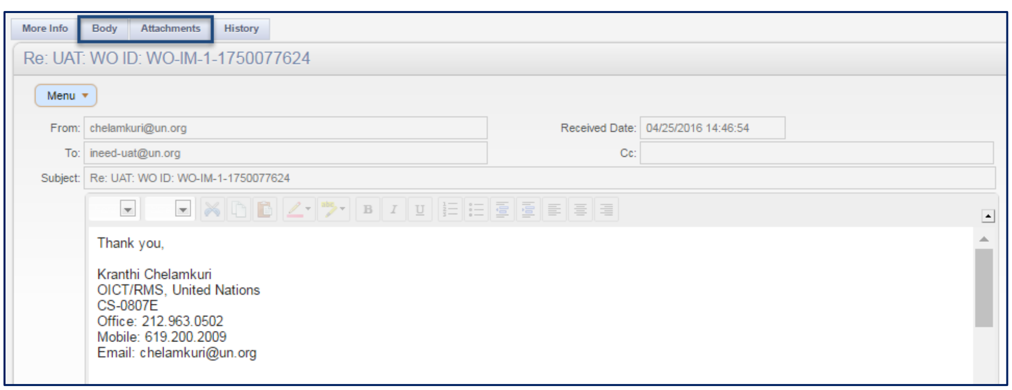
Part of the service desk responsibility is to monitor inbound and outbound communications to clients.

- Click on the Communications tab along the top of the application interface 1. You will be taken to the communication (email) screen.
- By default:
    - You will see emails that are assigned to your primary group based on the selection in the visibility drop-down menu 2.
    - It shows you unread emails via the **01-Inbox - Unread** pre-defined query (PDQ) 3.



- After review, you can change the **Status** to closed or cancel for an email.
- If there is no **SR #** or **WO Identifier** value, the email is new and not related to an existing SR. See *Creating a service request from an email* for the steps to create a new SR from an email.
- You can also reply, reply all or forward an email.

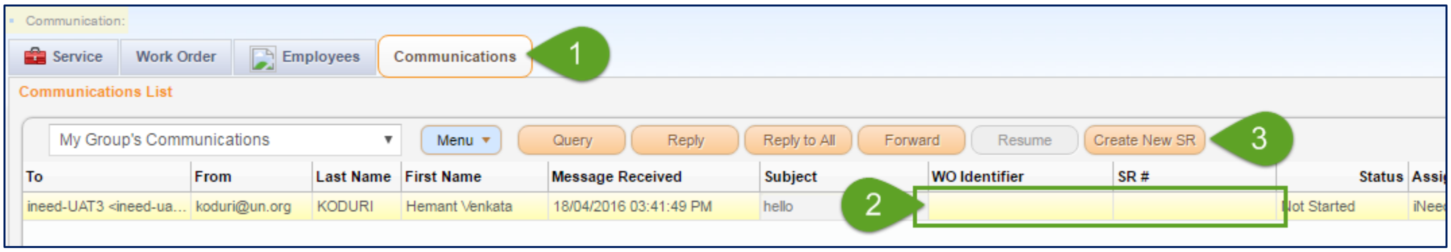
- The bottom half of the screen displays the email body, and a tab for all of the attachments in the email.



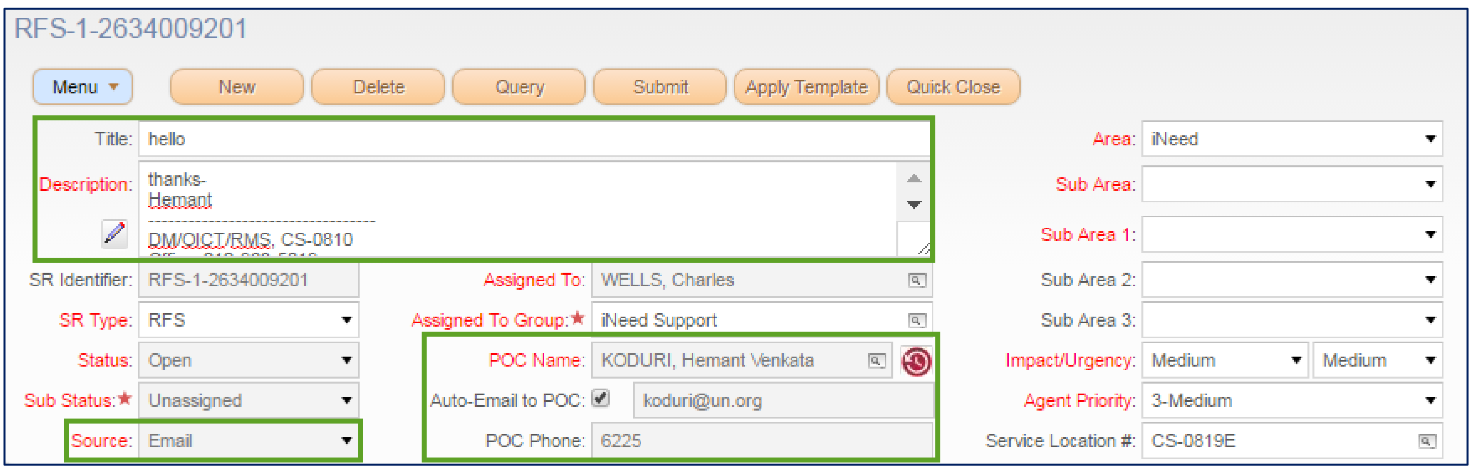
10.Creating a service request from an email

You can create an SR from an email that is not already associated with an existing SR or WO.

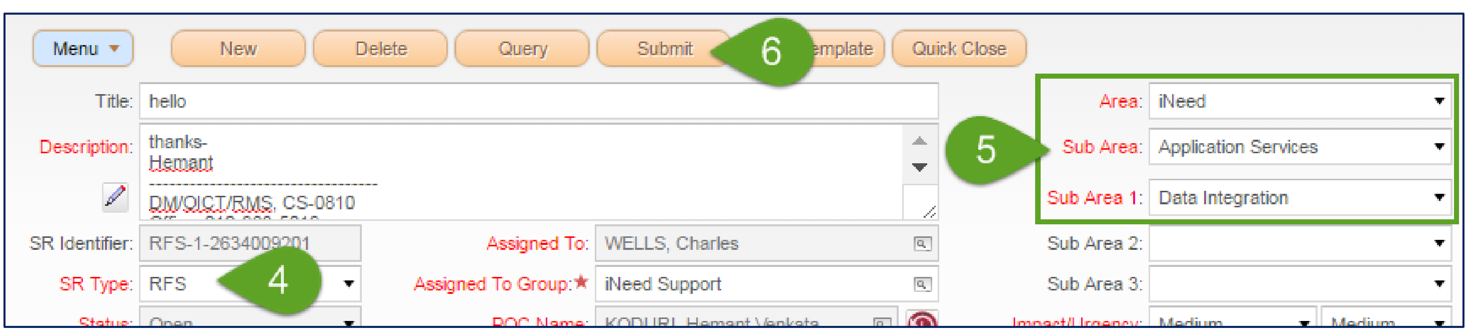
- Go to the **Communications** 1 tab. If the email has no ***WO Identifier*** or ***SR#*** value 2, highlight the email and click on **Create New SR** 3 to auto-generate and SR and associate the email to it.



- Different values from the email will populate SR fields:
  - Subject = Title
  - Body = Description
  - Sender = POC Name
  - Source also gets pre-populated with Email (and turned read-only)



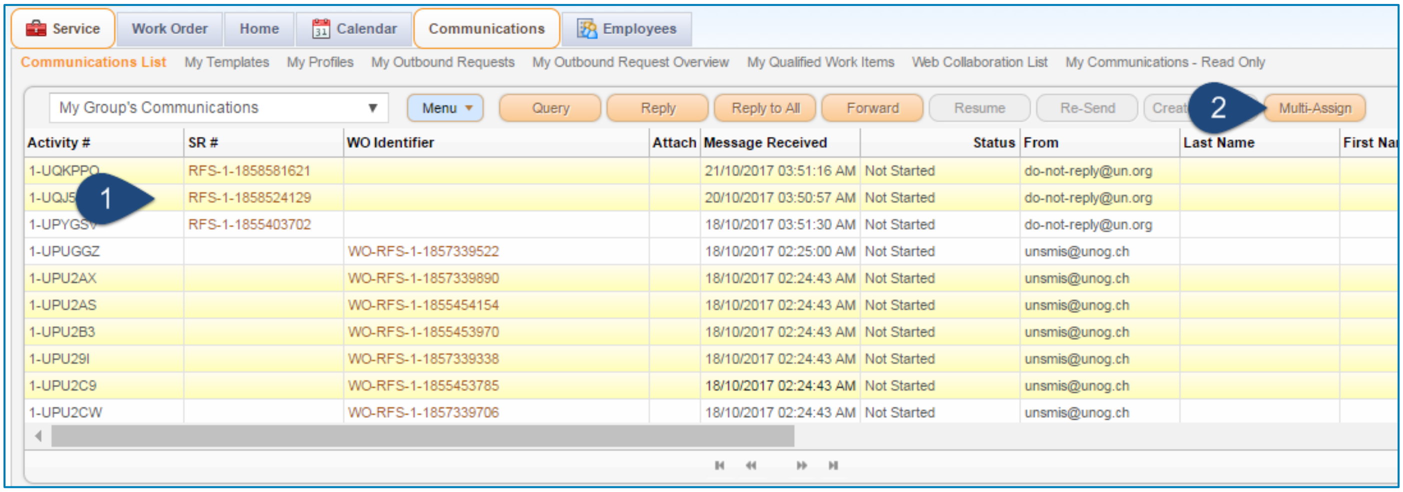
- Add the categories by selecting the correct **SR Type** 4 and **Area/Sub Area/1/2/3** 5 values. Click **Submit** 6 to finalise the SR.



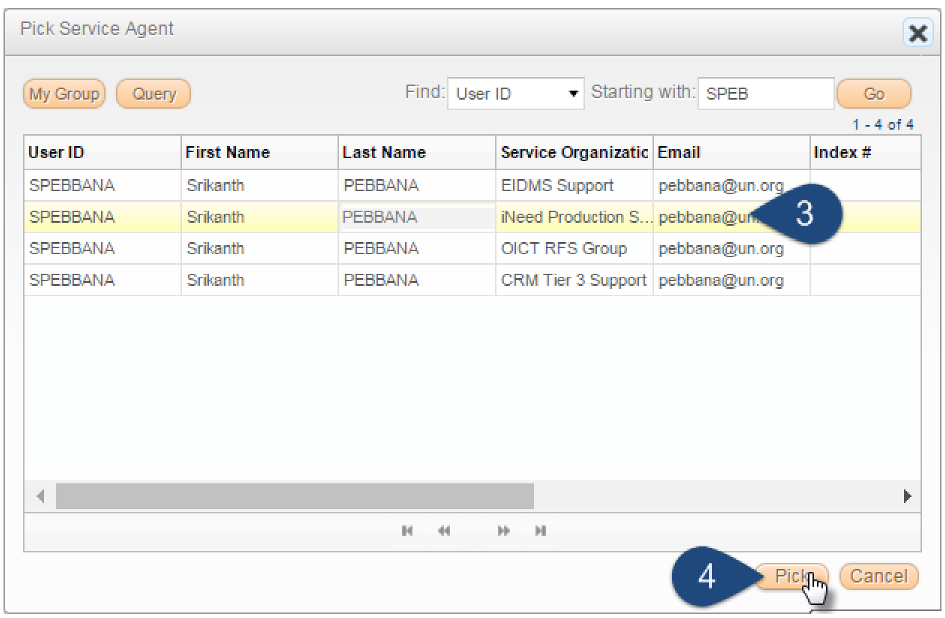
11. Assigning multiple emails at once

You may need to assign multiple emails to yourself or another agent.

- In the communications screen, highlight the records you wish to reassign.
- Click the **Multi-Assign** button.



- In the pop-up window, look for the user to whom the communications should be assigned. **Note:** If the user is part of multiple groups, several entries will appear. Ensure you select the appropriate group.
- Click **Pick**.



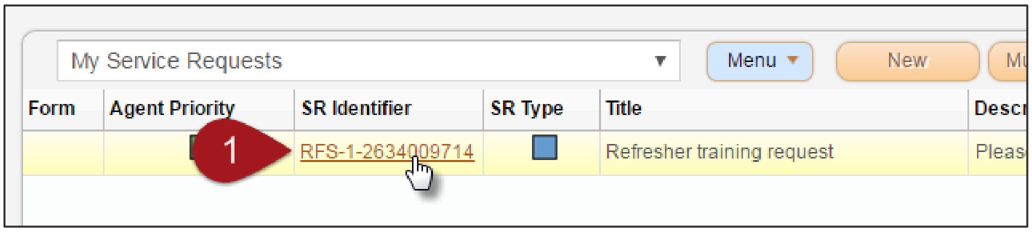
- The emails are assigned.

12. Adding a note to a service request

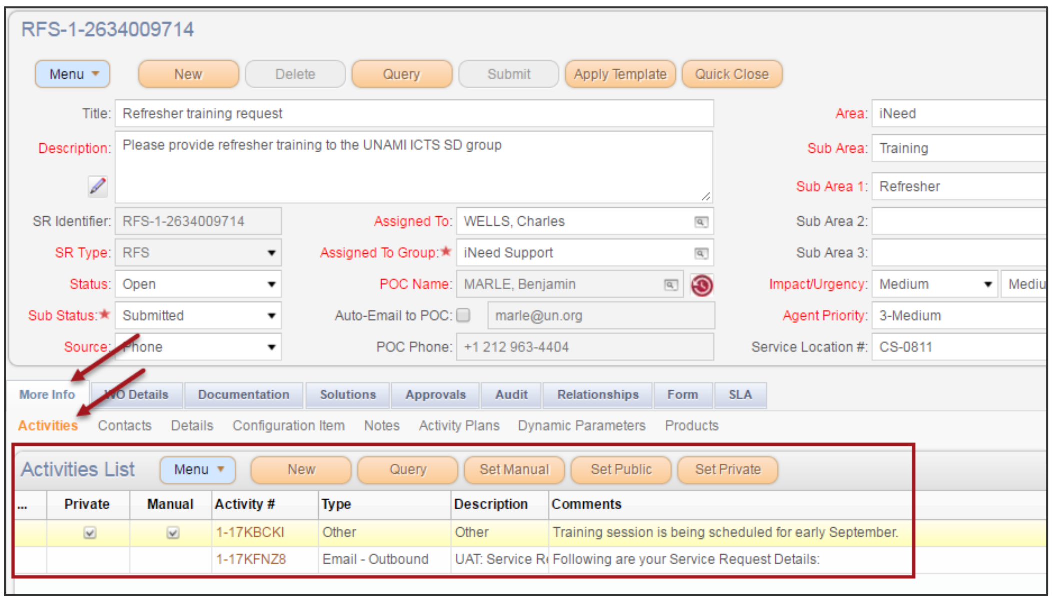
You may wish to add a note to a service request indicating what you did or what the current status is.

In iNeed, this is called an activity.

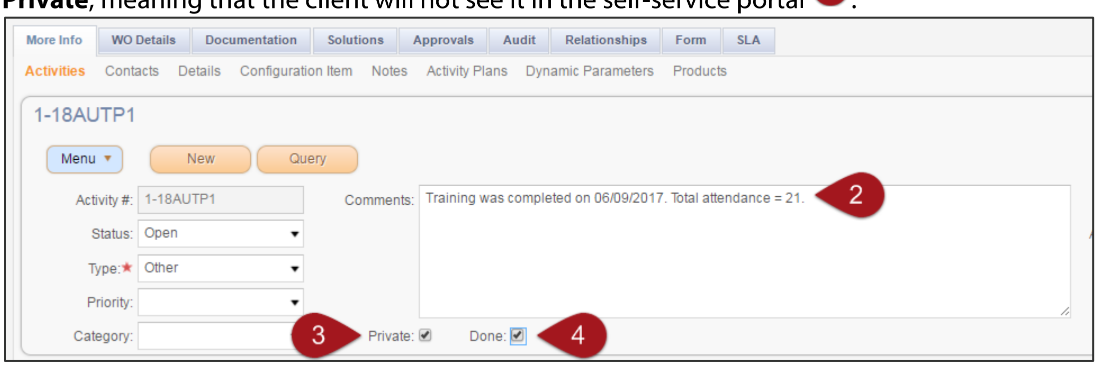
- To add an activity, go into the service request by clicking the **SR Identifier** link 1.



- You will find activities on the bottom half of the service request screen. It is the sub-tab that is displayed by default when entering the service request view.



- Click on the New button to create a new activity.
- Enter the note in the Comments section 2 and click on the **Done** checkbox 3. You can also mark an activity as **Private**, meaning that the client will not see it in the self-service portal 4.

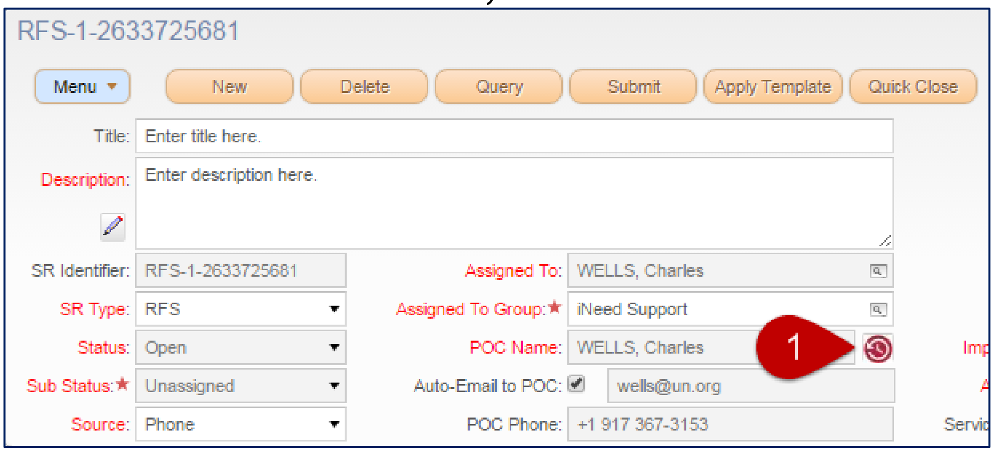


- Click somewhere on the top half of the screen or press **Ctrl+S** on your keyboard to save and close the note.

13.Seeing a client's SR history

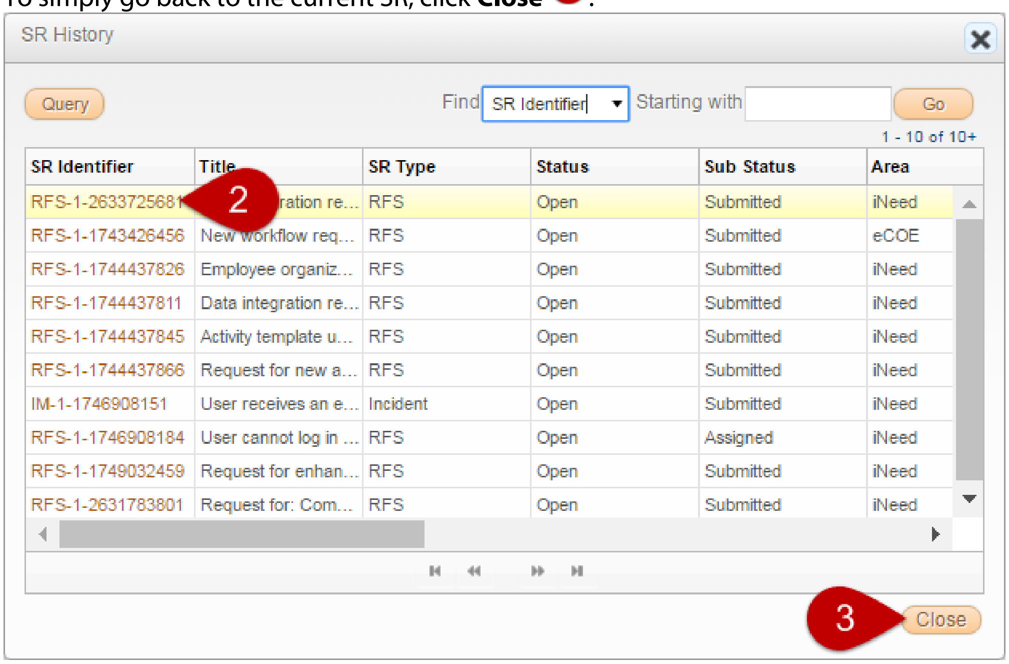
Sometimes, you may wish to see the client's previous SRs (for your Master Org only).

- Click on the icon to see the client history 1.



- The SR history of the POC will be shown. It sorts them based on when the SR was last updated. You can click on the SR number of any of the records to drill down into that particular SR 2.

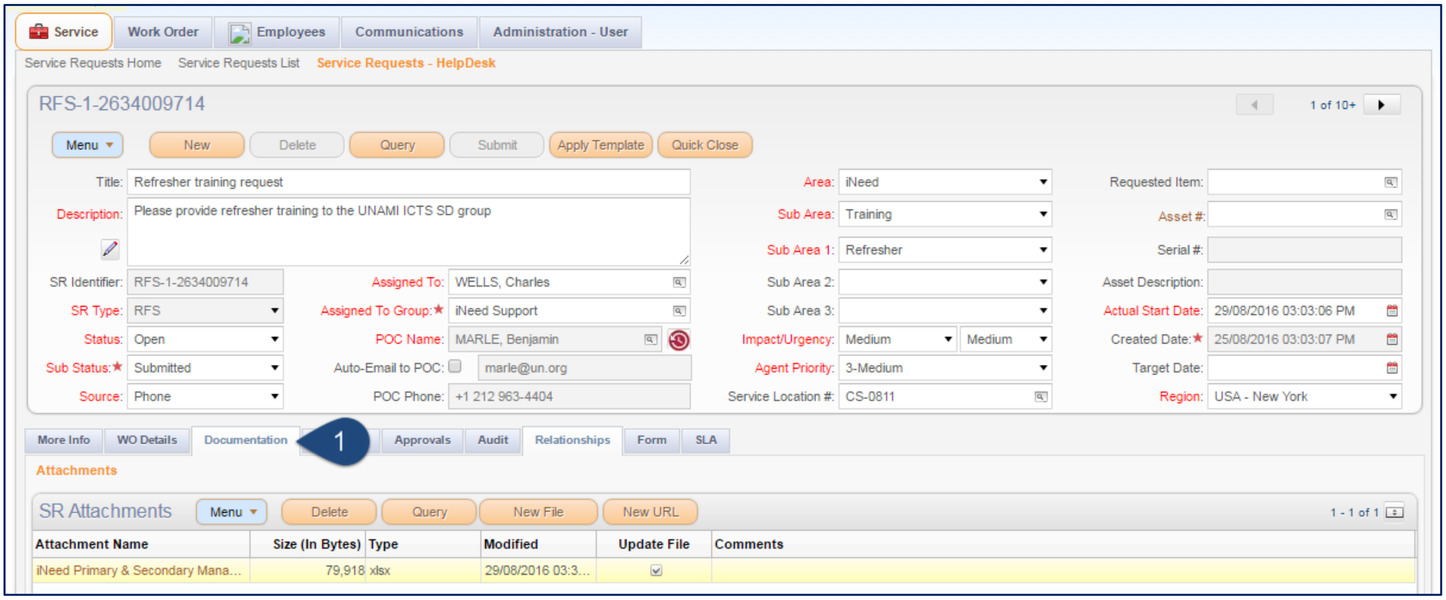
  To simply go back to the current SR, click **Close** 3.



14. Looking at service request attachments

Sometimes there are attachments as part of your service request.

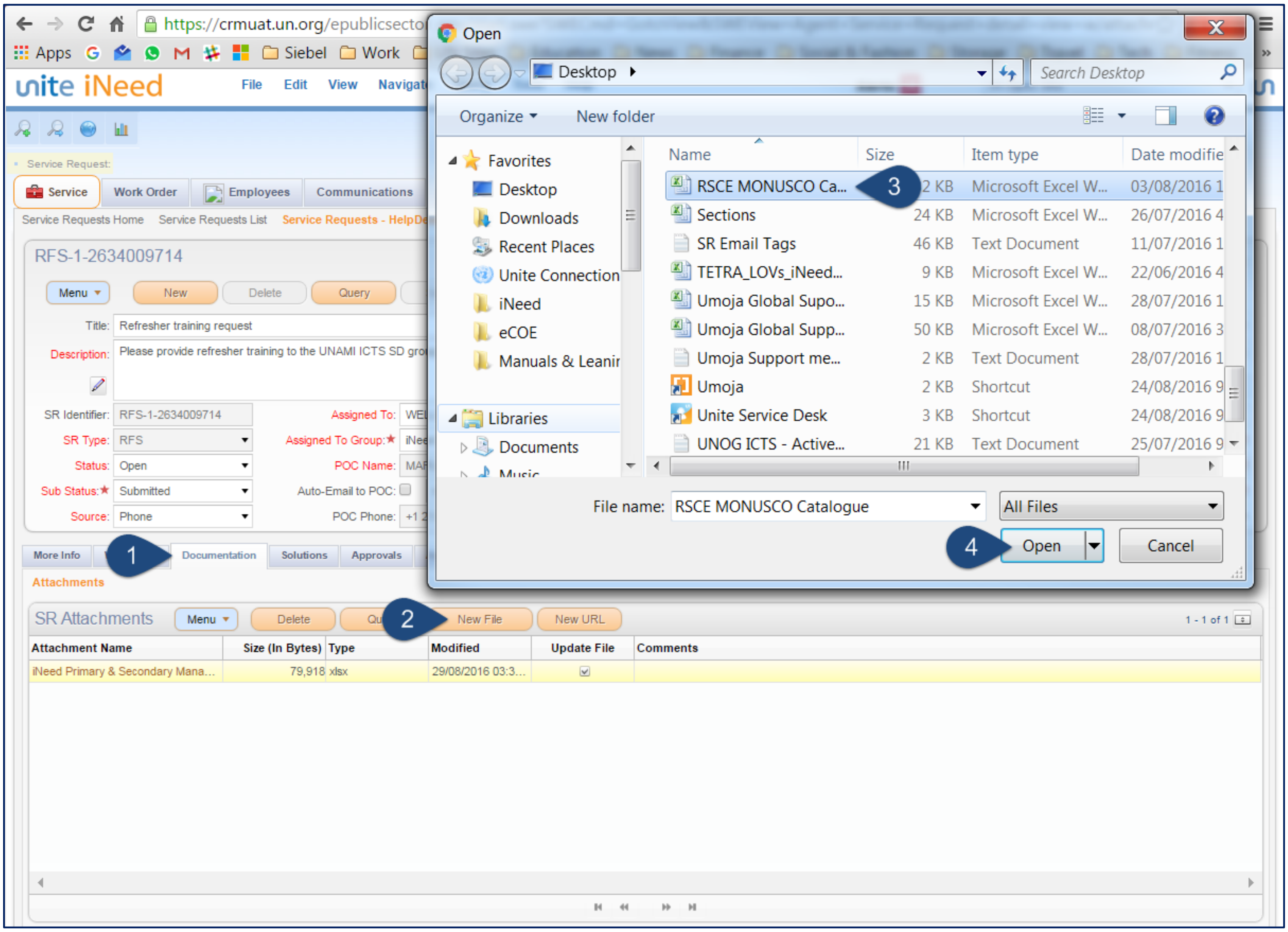
- From within the service request, click on the **Documentation** 1 tab to see service request (and service request) attachments.



15. Adding an attachment to a service request

You can add your own attachments to a service request.

- In the service request, click on **Documentation** 1.
- Click on **New File** 2.



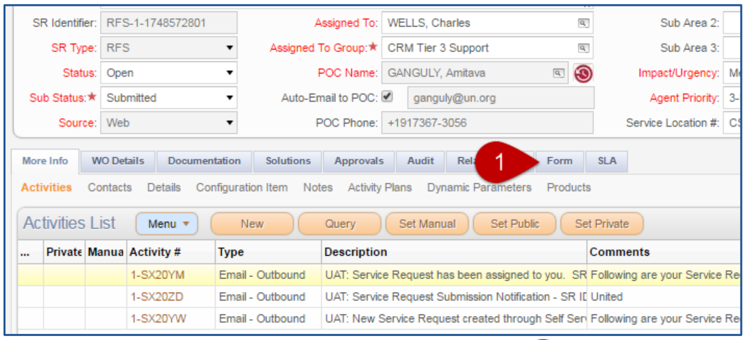
- Select the file 3. You can select multiple at the same time if needed.
- Click **Open** to complete the process 4.

Note: If you are using Google Chrome or Mozilla Firefox, you can drag and drop the files into the **SR Attachments** area to add them.

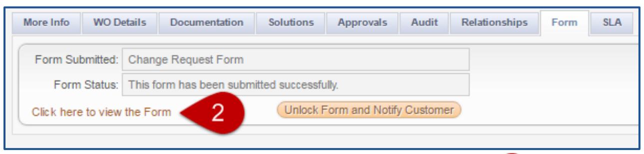
16. Viewing the form associated with a service request

Requests originating from self-service can have a form associated with it. This is indicated by the **Yes** value under the ***Form*** column in the SR list view. To see the form details:

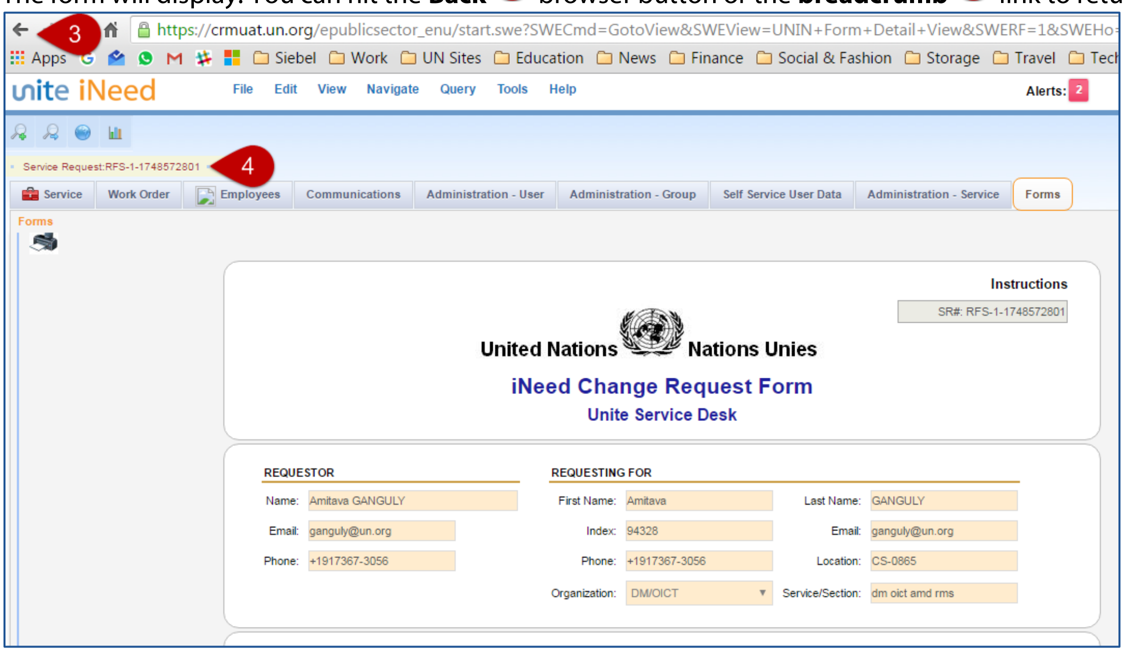
- Drill down into the SR
- Click on the **Form** sub-tab 1.



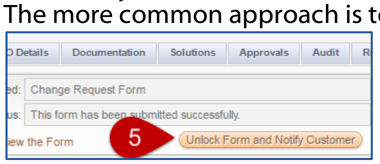
- Click on the **Click here to view the Form** link 2.



- The form will display. You can hit the **Back** 3 browser button or the **breadcrumb** 4 link to return to the SR.



- **Optional:** If the form is incomplete, you can reject it and send it back to the client for resubmission. Click on **Unlock Form and Notify Customer** 5. An email screen will open allowing you to compose and send a rejection email. The more common approach is to



17. Resolving a service request

Once all of the work orders and/or all actions have been completed, **and you wish to give the client time to review the request and respond to the SD prior to closure**, you will want to change the status of the SR to **Resolved**. For complete closure of the SR, please see *Closing a service request*.

In order to resolve a service request, **and have it auto-close after a predetermined number of days**, four requirements need to be fulfilled:

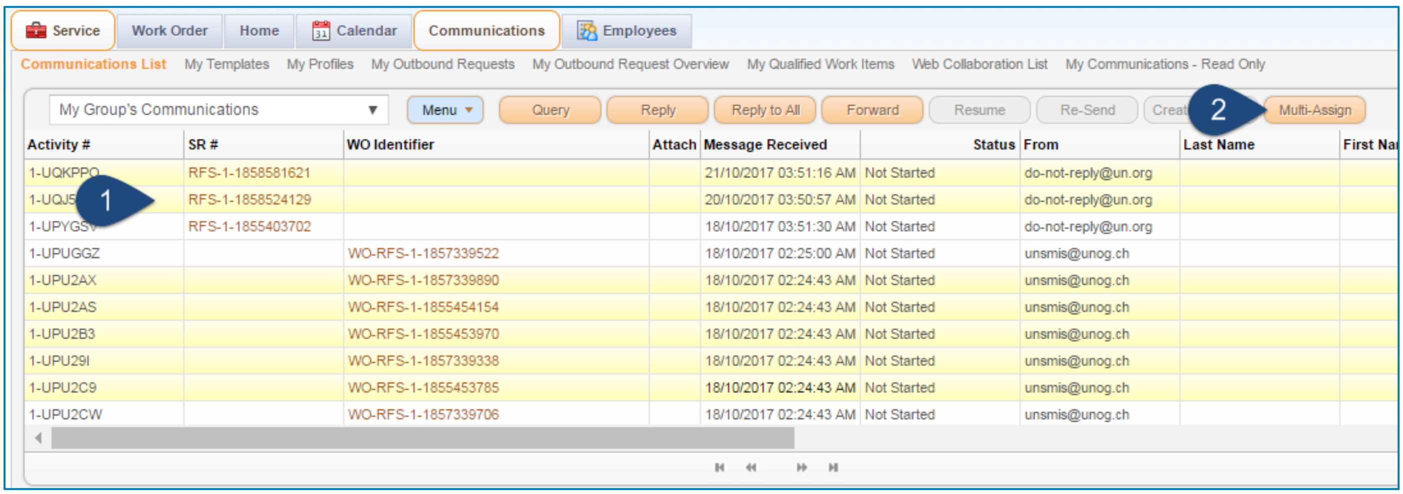
1. The service request needs to be assigned to someone (see Assigning a service request to yourself/someone else).
2. There needs to be a "manual" activity.
3. All activities within the service request must be closed or cancelled.
4. All work orders (if applicable) in the service request must all be closed or cancelled.

What is a manual activity?

A manual activity is any activity that is not generated by the system, be it an email you sent from the service request (see *Emailing the customer*), or just a note that you added to indicate what you did (see Assigning multiple emails at once
You may need to assign multiple emails to yourself or another agent.

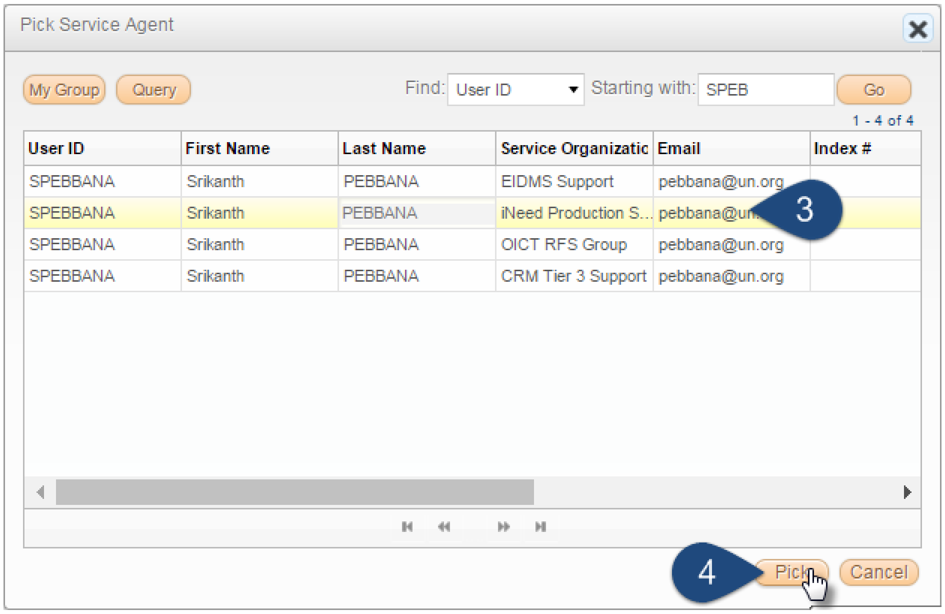
In the communications screen, highlight the records you wish to reassign.

Click the **Multi-Assign** button.



In the pop-up window, look for the user to whom the communications should be assigned. **Note:** If the user is part of multiple groups, several entries will appear. Ensure you select the appropriate group.

Click **Pick**.

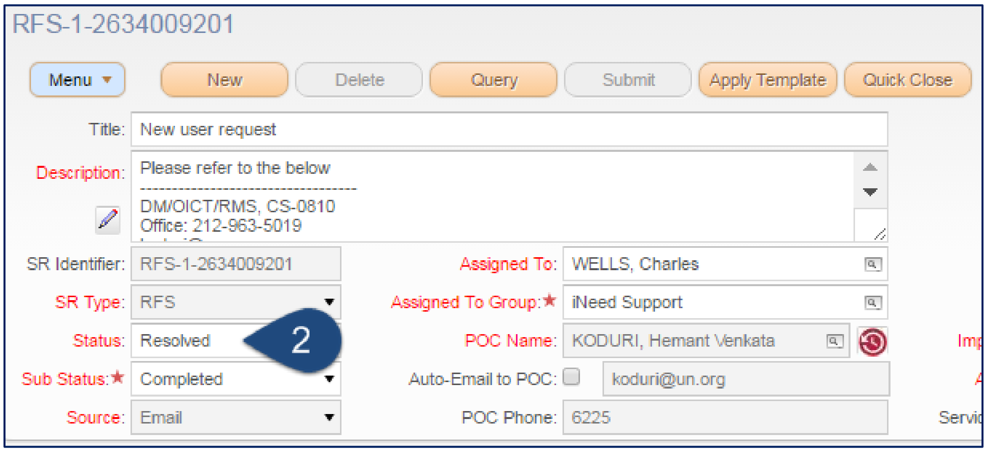


The emails are assigned.

Adding a note to a service request).

I have done all that? Now what?

Change the ***Status*** to **Resolved** 1.



That's it. The SR will automatically be closed by the system. How long depends on your configuration. Check with your iNeed focal point or manager.

18. Closing a service request

Once all of the work orders and/or all actions have been completed, **and you are certain the client is satisfied with the result**, you will want to close the service request to remove it from your queue. If uncertainty remains about client satisfaction, please see *Resolving a service request*.

In order to close a service request, four requirements need to be fulfilled:

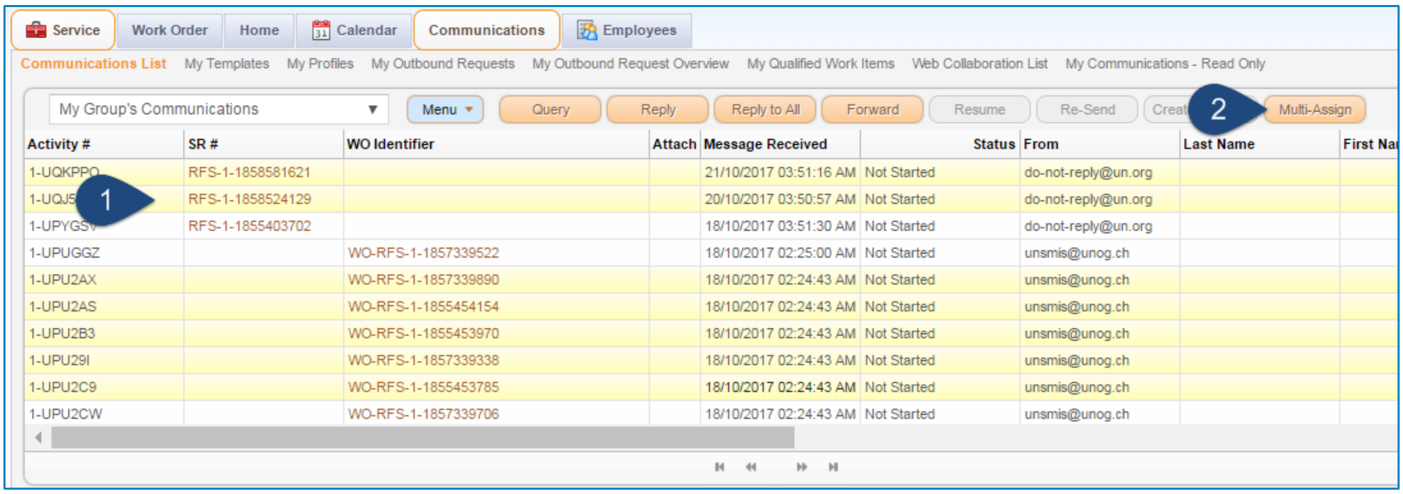
5. The service request needs to be assigned to someone (see Assigning a service request to yourself/someone else).
6. There needs to be a “manual” activity.
7. All activities within the service request must be closed or cancelled.
8. All work orders (if applicable) in the service request must all be closed or cancelled.

What is a manual activity?

A manual activity is any activity that is not generated by the system, be it an email you sent from the service request (see *Emailing the customer*), or just a note that you added to indicate what you did (see Assigning multiple emails at once
You may need to assign multiple emails to yourself or another agent.

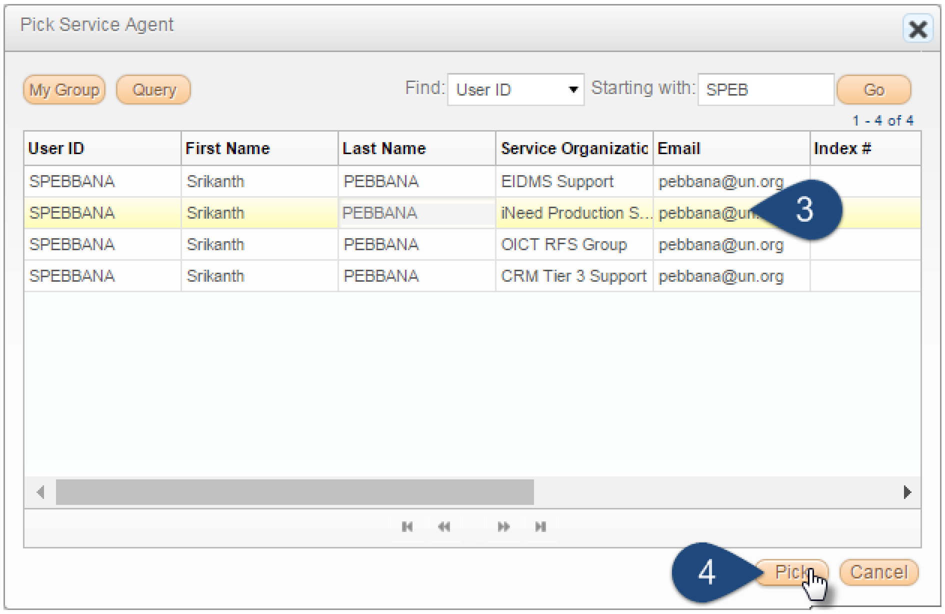
In the communications screen, highlight the records you wish to reassign.

Click the **Multi-Assign** button.



In the pop-up window, look for the user to whom the communications should be assigned. **Note:** If the user is part of multiple groups, several entries will appear. Ensure you select the appropriate group.

Click **Pick**.

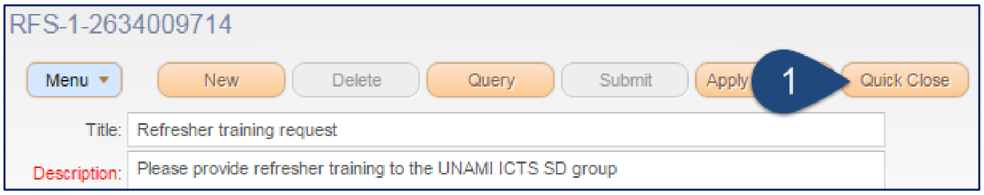


The emails are assigned.

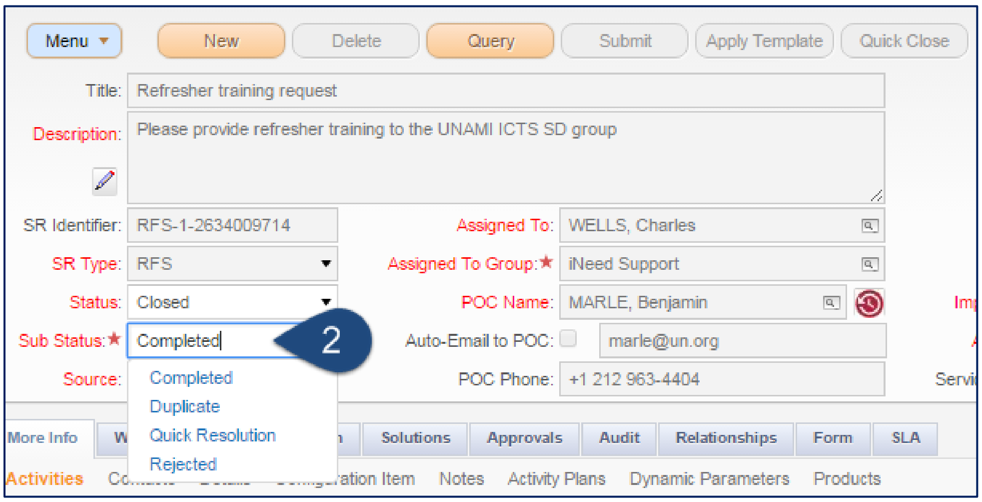
Adding a note to a service request).

I have done all that? Now what?

Click **Quick Close** 1.



If needed, you can also specify a **Sub Status** 2 after you close the service request.



19. Cancelling a service request

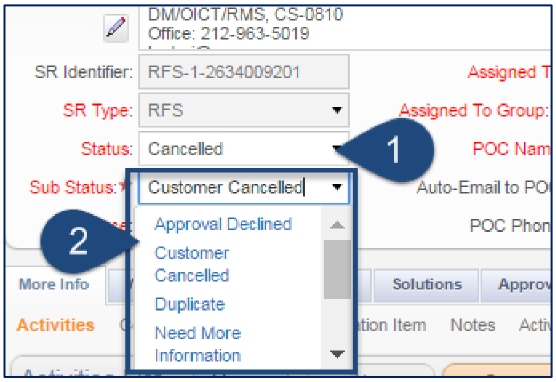
What if you are cancelling or rejecting a request because the customer cancelled or the client is not eligible for the product or service?

In order to cancel a service request, two requirements need to be fulfilled:

1. The service request needs to be assigned to someone (see Assigning a service request to yourself/someone else).
2. All activities within the service request must be closed or cancelled.

OK, then what?

Change the **Status** to ***Cancelled*** 1 and then specify one of the **Sub-Status** values as a reason (optional) 2.



Please note that if you select **Rejected** as the Sub Status, an email will be sent to the client notifying them of the rejection.

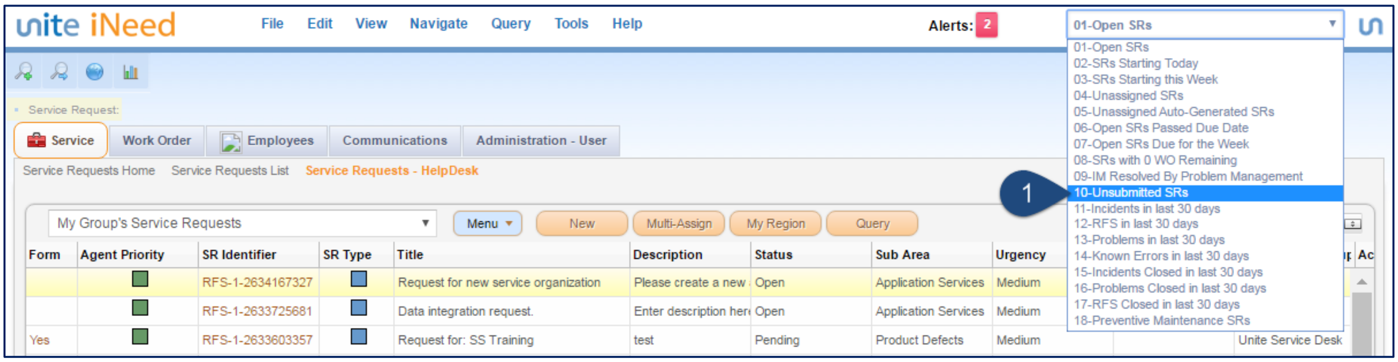
20. Checking for unsubmitted SRs

There are several cases where SRs are unsubmitted:

1. The SR is coming from a self-service catalogue item where the process flow does not automatically submit it.
2. A web service has generated the SR.
3. An agent creates an SR (from email or manually) and forgets to submit it.

You can check for unsubmitted SRs to either submit or delete them.

- From the SR view, select the PDQ **10-Unsubmitted SRs** 1.



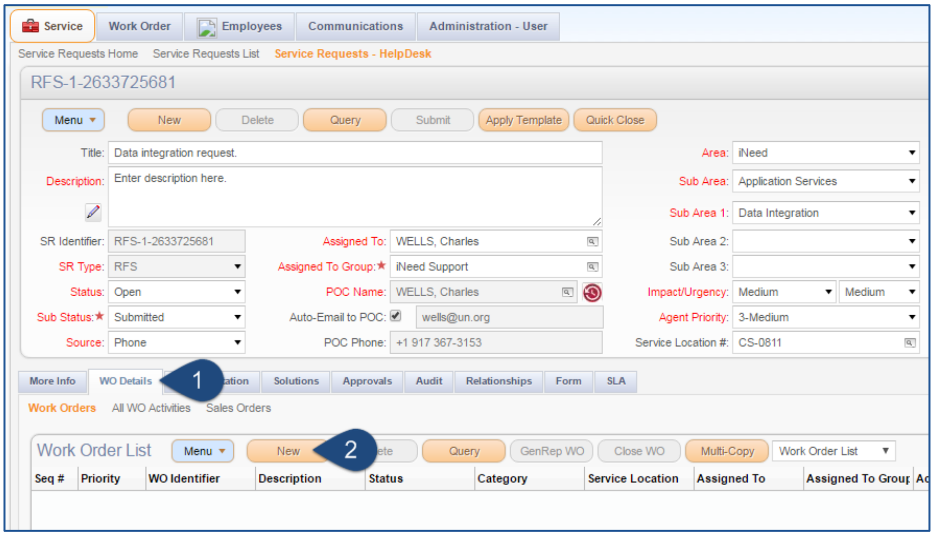
- You will be shown all of the SRs that are not yet submitted. At this point, you have the option to either submit or delete the SR. **Please note that deletion of valid requests is not advised as it will impact client satisfaction and the timely resolution of incidents and requests.**

21. Creating a work order (WO)

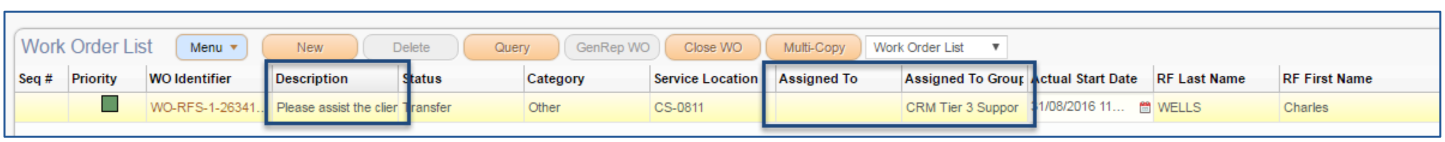
Escalation of requests to a tier 2 or 3 team is part of standard service operations where a service desk agent is unable to resolve on first contact. Many requests, in particular those coming from self-service, already apply work order templates automatically.

In some cases, you as a service desk agent will need to escalate a ticket manually to an escalation team.

- From the SR screen, go to the **WO Details** sub-tab 1. You will see the work order list, including any existing work orders that are already part of the SR.
- Click on **New** on the Work Order List view 2.



- Update the *Description* and the *Assigned To*/*Assigned To Group* fields.
  - If you want to assign the WO to an agent, change *Assigned To* (only works for groups in your master org).
  - If you want to assign the WO to a group, change *Assigned To Group*. The agent field will be blank (or will be set to the primary contact for the group if she exists).



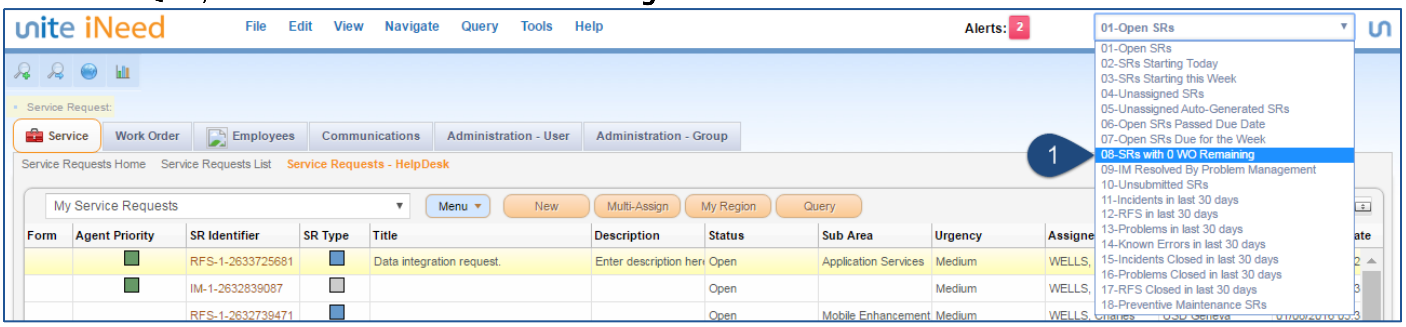
22. Checking for SRs where all the work orders are closed/no work orders exist

As a service desk agent, you are responsible for ensuring that requests are completed and resolved. Automatic resolution **can** be enabled for self-service items, but all other request avenues still require you to actively monitor and resolve your requests.

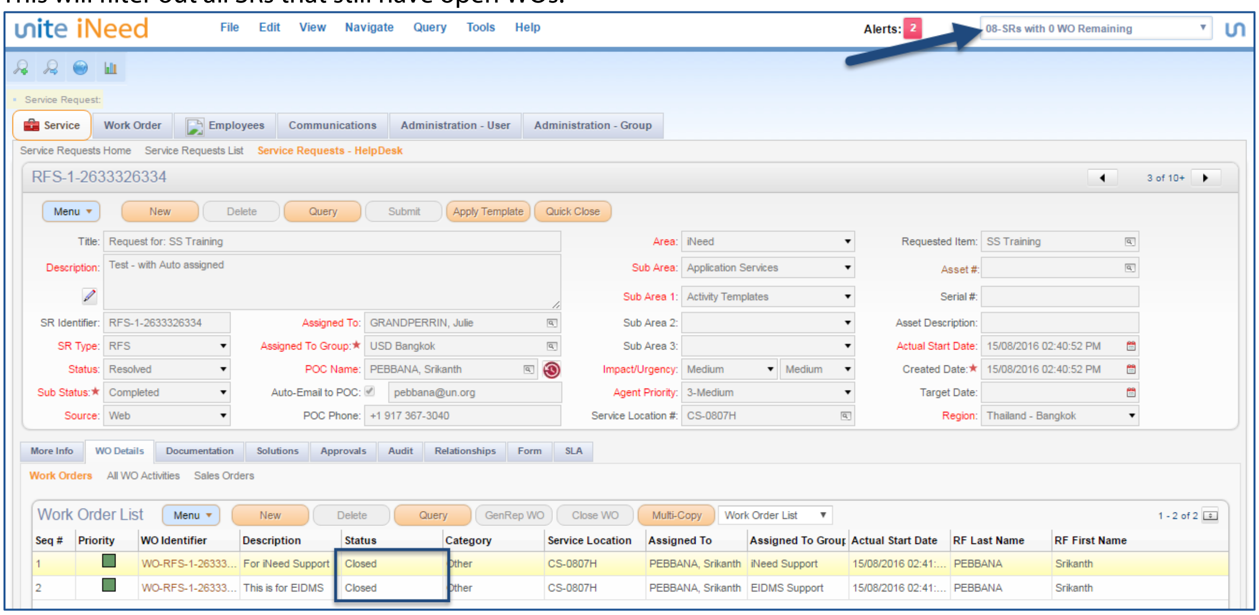
This includes both SRs where all the work orders are closed/cancelled, and SRs that never had work orders to begin with.

In order to do so, a PDQ exists that will let you quickly filter for these requests.

- From the PDQ list, click on **08-SRs with 0 WO Remaining** 1.



- This will filter out all SRs that still have open WOs.

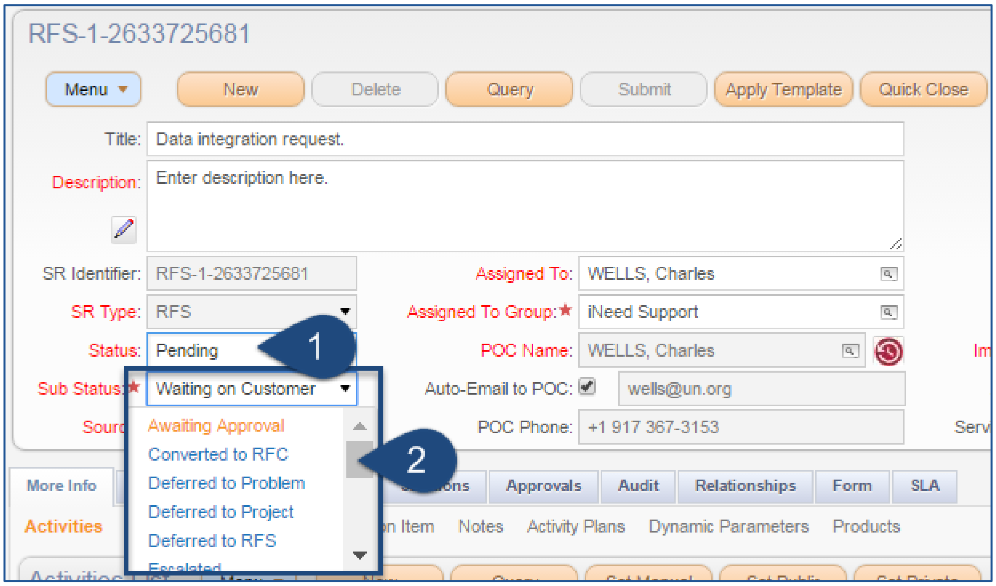


- If it is deemed appropriate to resolve the request, you can follow the steps for *Resolving a service request* or *Closing a service request*.

23. Waiting on a response (changing service request status to pending)

Sometimes, you may need either your client or a third party to get back to you with some more information before you are able to proceed.

After you send a query to the other party and are waiting for a response (see *Emailing the customer*), you can change the status 1 of the work order to **Pending** and the sub-status 2 to whatever best represents the reason for the delay.



24. Informing the client of service request resolution

Informing the client:

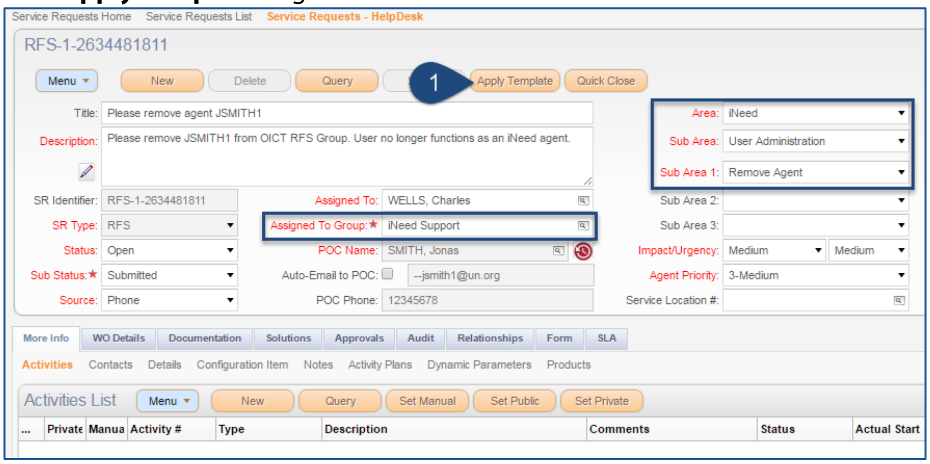
It should not be necessary to inform the client about the SR resolution. Generally, the system will do so automatically, but in certain cases you may be required to send a separate notification to the client. Please refer to your internal business processes to determine the proper SOP.

In cases where it is deemed necessary to inform the client directly, please refer to *Emailing the customer* *in this document.*

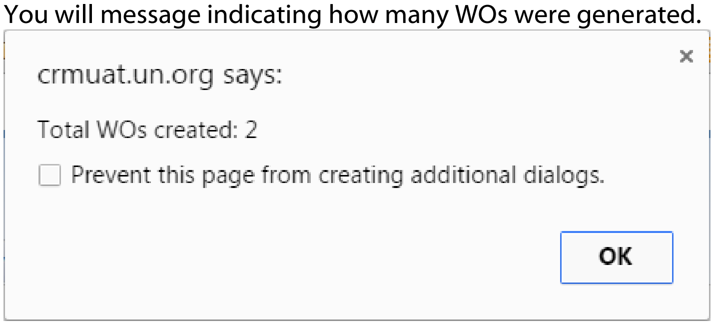
25.Applying an work order template

Some SRs already have work order templates associated with them. This template will automatically create all the work orders for you. A lot of self-service items have templates, but some manual templates can also be applied. Please check your SOPs or ask your iNeed focal point if you are unsure which SRs have templates.

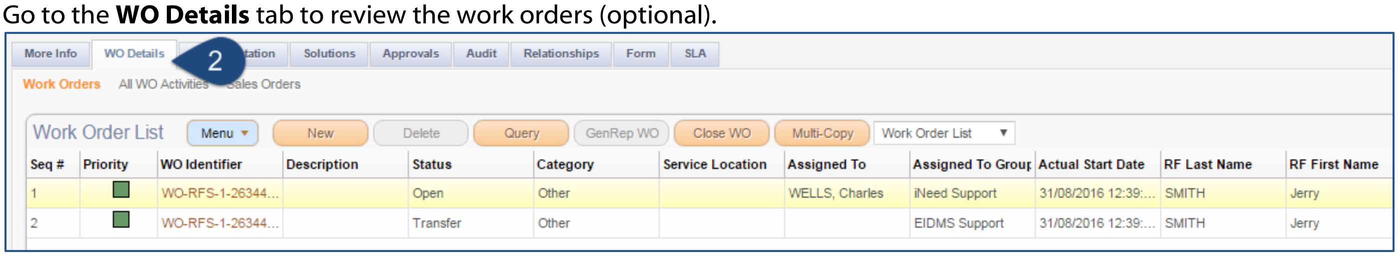
- Templates are associated to the request categories (Area/Sub Area/Sub Area 1/2/3) and the Assigned To Group of the request.
- Click **Apply Template** to generate the work orders in the SR 1.



- You will message indicating how many WOs were generated.



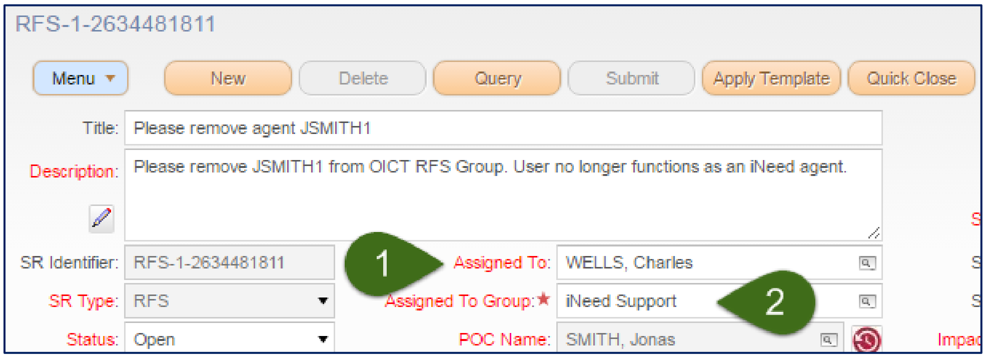
- Go to the **WO Details** tab to review the work orders (optional).



26. Reassigning a service request to another Assigned To Group

iNeed allows you to reassign a service request to another group.

This can be achieved by simply changing the **Assigned To** 1 or **Assigned To Group** 2 values.



Note: For reassignment to another agent within your master organization, please see *Assigning a service request to yourself/someone else*.

Important: Please make sure to only reassign service requests if you support processes/SOPs permit such actions.

Some very important things to remember before reassigning to another group:

- If you reassign an SR to a group you are not a part of, it will immediately become read-only and will prevent you from further updating the request!
- Make sure to fill in all the pertinent information and submitting the request before you reassign it to the other group. This way, you can be sure that you are not assigning incomplete SRs.
- You cannot assign it to a specific agent within a group you are not a part of.

27. Changing a list view layout

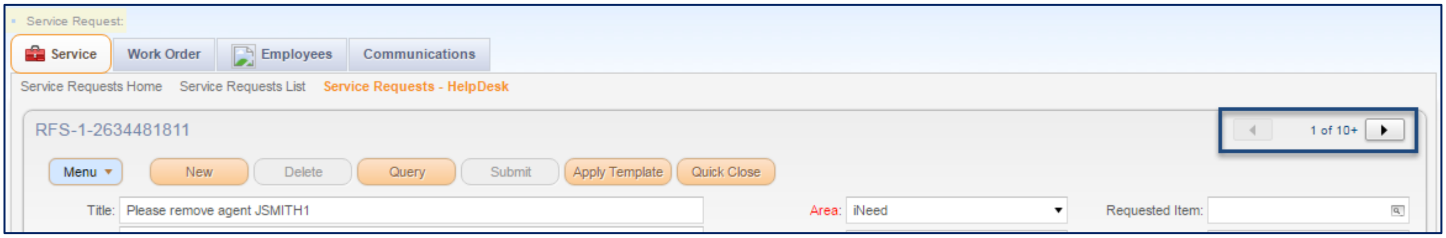
You can update any list view in iNeed, meaning that you can add/remove columns and resize them to your liking.

Since there are a number of different options, please refer to Navigation & Basics (page 10) for more details.

28. Moving between service requests

If you are in the service request details view, you can navigate between records by using the previous/next record arrows on the top right of the screen.

The order of the SRs, as well as which records appear, is determined by the visibility and PDQ from the list view screen.



29.Searching for an employee record

You may wish to see the record of an employee to view details and any SRs associated with them.

- Click the site map icon
- Select ▪ Employees and then ▪ Employees List
- Search for the employee record by clicking the Query button.
- Select the record by clicking on the last name link for the record.

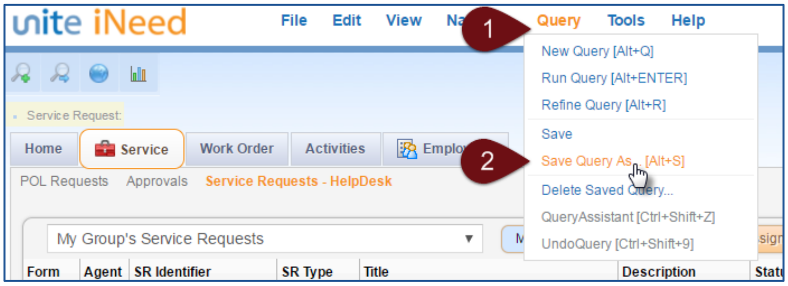
Last Name	First Name	Index
VALDES	Jonathan	17043
VALD	Jonathan Christian	

- The employee record (including subtabs) is displayed.

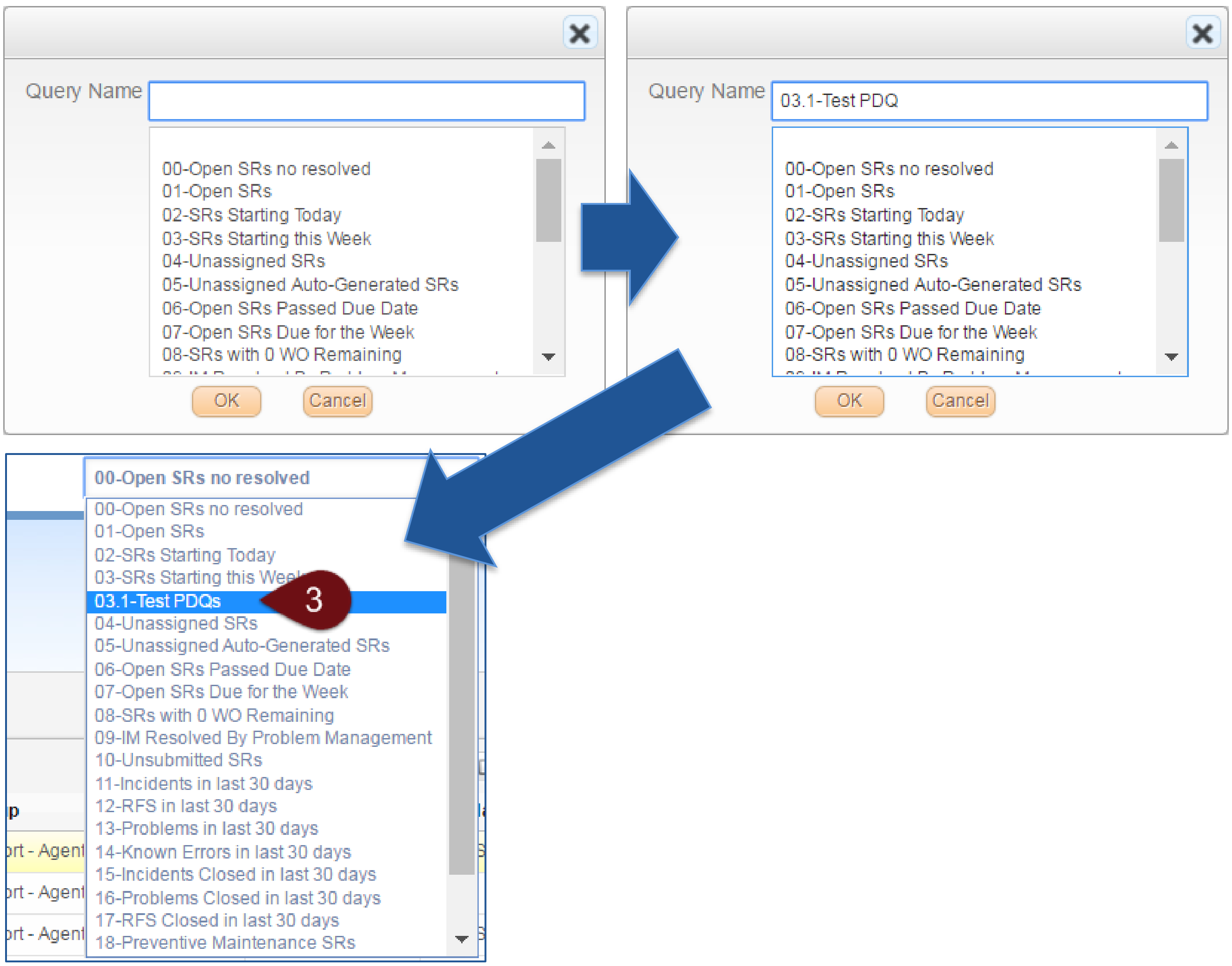
30.Saving a custom query to your PDQ list

After running a query (for more information on querying, please see the Querying Guide here), you can save the query to your PDQ list.

- After performing a custom query and sort, click on **Query** ❶ ➔ **Save Query As… [Alt+S]** ❷



- Enter the name of the query in the text field at the top. **Please note that the list will sort itself alphanumerically, meaning that the name *03.1-Test PDQ* will end up between *03-SRs Starting this Week* and *04-Unassigned SRs***

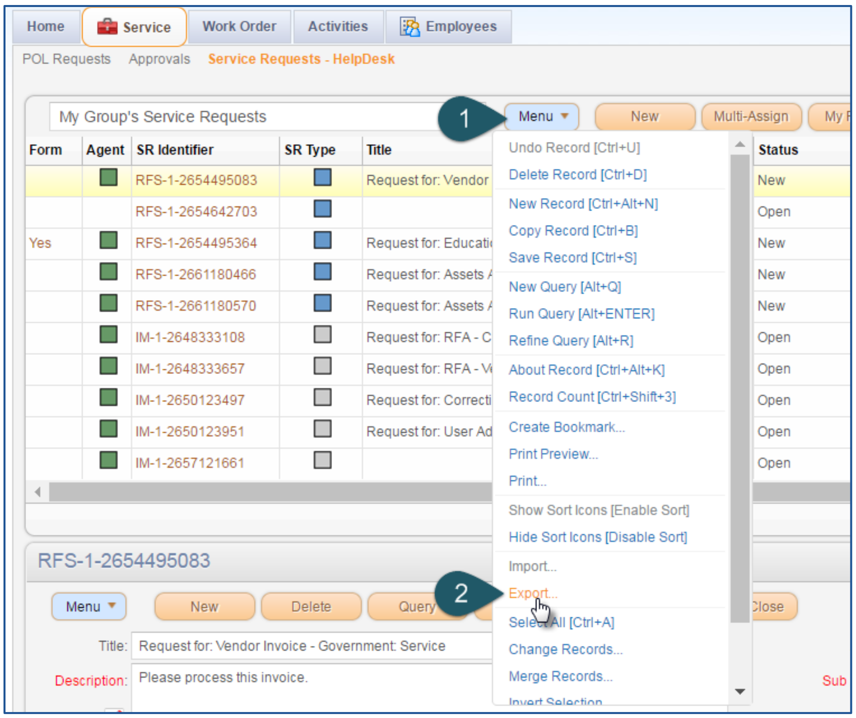


If you give an item a name that places it at the top of the PDQ list, it will be the first query run when coming to the screen.

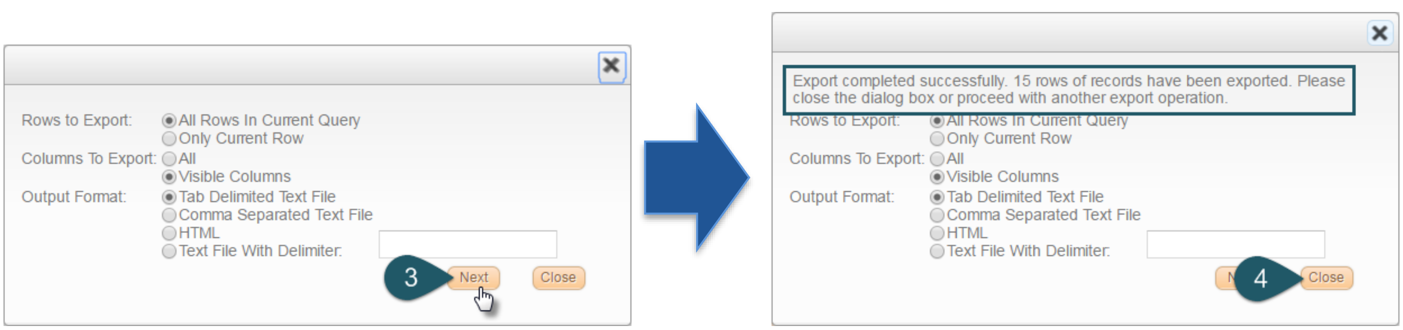
31.Exporting data from iNeed

Most list views allow you to export data to Excel.

- Click on **Menu ➔ Export**.



- In the pop-up, make the appropriate selections for the content and format of the exported file and click **Next**.
- A message will appear once the export has completed successfully. Please wait until your export has completed successfully and the file has finished downloading before clicking **Close**.



32. Query operators

When performing manual queries (searches) in iNeed, use the following keywords to construct your search strings:

Operator	Description	Example
*****	Wildcard operator. Placed anywhere in a string, returns records containing the string or containing the string plus any additional characters at the position at which the asterisk appears, including a space.	*rang* finds *arrange*, *arranged*, *orange*, *orangutan*, *range*, ranges, *ranging*, *rang*, *strange*, *stranger*, *strangest*, *strangle*, *wrangle*, and so on. You cannot use * to find dates.
?	Wildcard operator. Placed anywhere in a string returns records containing the characters specified in the string plus any one additional character which appears at the location of the question mark.	?rag finds *brag*, *crag*, or *drag*, but not *bragging*. t?pe finds *type* and *tape*, but not *tripe*.
""	Surrounds a string that, unless modified by a wildcard (* or ?), must be matched exactly. Quotes let you query for a group of words in its exact order.	"Sun Solaris" finds records that contain *Sun Solaris* in the query field.
=	Placed before a value, returns records containing a value equal to the query value.	=Smith finds all records for which the value in the query field is *Smith*. It also turns off wildcards within the query value.
<	Placed before a value, returns records containing a value less than the query value.	<6/20/01 finds all records in which the value of the query field is before 20 June 2001. When entering a date, use the format that is specific to your implementation.
>	Placed before a value, returns records containing a value greater than the query value.	>5/31/01 finds all records in which the date in the query field is later than 31 May 2001. When entering a date, use the format that is specific to your implementation.
<>	Placed before the value, returns records containing a value that is not equal to the query value.	<>6/20/01 finds all records in which the date in the query field is not 20 June 2001. <>Paris finds all the records in which the value in the query field is not *Paris*.
<=	Placed before a value, returns records containing a value less than or equal to the query value.	<=500 finds all the records in which the value in the query field is less than or equal to 500.
>=	Placed before a value, returns records containing a value greater than or equal to the query value.	>=500 finds all records in which the value in the query field is greater than or equal to 500.
Today()	Placed on Date and Datetime fields. This can be used in conjunction with <, >, =. Used to denote current datetime value.	< Today () – 1 finds all records in which the value in the query field is older than yesterday.
IS NULL	Keywords used to find entries where the field has no value whatsoever.	Closed Date IS NULL finds all rows that have no Closed Date.
IS NOT NULL	Keywords used to find entries where the field has any value.	Closed Date IS NOT NULL finds all rows that have a Closed Date.
~LIKE	Allows you to ignore case sensitivity when querying.	~LIKE “test” will return **Test**, **test** and **TEST**.
AND	Used to combine operations where both have to be true.	> 02/05/2013 **AND** <= 16/05/2013 returns anything between the 3rd and 16th of May 2013.
OR	Used to combine operations where either or both are true.	Open **OR** Closed will return both open and closed results.

33. Useful keyboard shortcuts

Below is a list of common keyboard shortcuts to make navigation in the system easier for iNeed users:

- Record Navigation:
    - Next field = Tab
    - Previous field = Shift + Tab
    - Save record = Ctrl + S
    - New record = Ctrl + Alt + N
    - Copy record = Ctrl + B
    - Delete record (where applicable) = Ctrl + D
    - Refresh view = Alt + Enter
    - Next/Previous record in a list = Ctrl + Shift + < / >
    - Next/Previous Page on a list = Ctrl + Alt + < / >
    - Select all records = Ctrl + A
    - Record count: Ctrl + Shift + 3
- Query Management:
    - New query = Alt + Q
    - Run query = Alt + Enter
    - Refine query = Alt + R
    - Save query as = Alt + S
- Menu Options:
    - Define columns displayed = Ctrl + Shift + K
    - Define sort order = Ctrl + Shift + O
    - Site map = Ctrl + Shift + A
    - Log out of iNeed = Ctrl + Shift + X