Department of Labor
Employment and Training Administration

ETA

Ticket Entry and Management SOP
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Submitted to:

OIST

Submitted by:

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1 Background

1.1 Description

In order to manage and process requests by ETA users, OIST requires its employees to enter those requests into the CA Service Desk system. This Standard Operating Procedure defines how service tickets are entered, updated, and closed using Service Desk.

1.2 Trigger Events

The following events will trigger this Standard Operating Procedure:

- An incident is reported to an OIST employee via email, phone, or in person (i.e. a "walk-in").
- Whenever it is necessary to record that OIST has taken action on behalf of a user.

1.3 Responsibilities

Role	Responsibilities
DOL ETA Help Desk COTR	Monitors and assesses the overall effectiveness of Service Desk processes.
Service Desk Contract PM	Implements Service Desk processes and monitors those processes on a day-to-day basis.
Team Leads	Ensures that service ticket requests are assigned to appropriate OIST personnel and manages how those tickets are handled on a day-to-day basis.
Front Desk Specialist	Assigns each service ticket to the appropriate OIST employee.
PC Specialist	Can assign a service ticket to the appropriate OIST employee, including him or herself.
Network Engineer	Can assign a service ticket to the appropriate OIST employee, including him or herself.
Oracle DBA	Can assign a service ticket to the appropriate OIST employee, including him or herself.
Cold Fusion Administrator	Can assign a service ticket to the appropriate OIST employee, including him or herself.
UNIX Administrator	Can assign a service ticket to the appropriate OIST employee, including him or herself.

1.4 Authority

The Service Desk is authorized by the COTR to assist DOL ETA with IT-related tasks per the appropriate federal contracts.

2 Enter Ticket into Service Desk

2.1 Collect Information from User

When an ETA user reports an incident to the Service Desk, a Service Desk employee must enter the incident into the CA Service Desk application. Once the incident has been entered into CA Service Desk, it becomes known as a "ticket." In order to create a ticket, the Service Desk employee must have the following information:

- Name (first, last and middle if necessary)
- Agency
- Room number
- Phone extension
- Description of incident.

2.2 Enter Information into CA Service Desk.

To generate a ticket, the Service Desk employee must open Internet Explorer 8 (IE 8) and access the CA Service Desk web application by entering the following URL into IE 8's Address bar:

https://servicedesk.doleta.gov/

The following web page will appear:

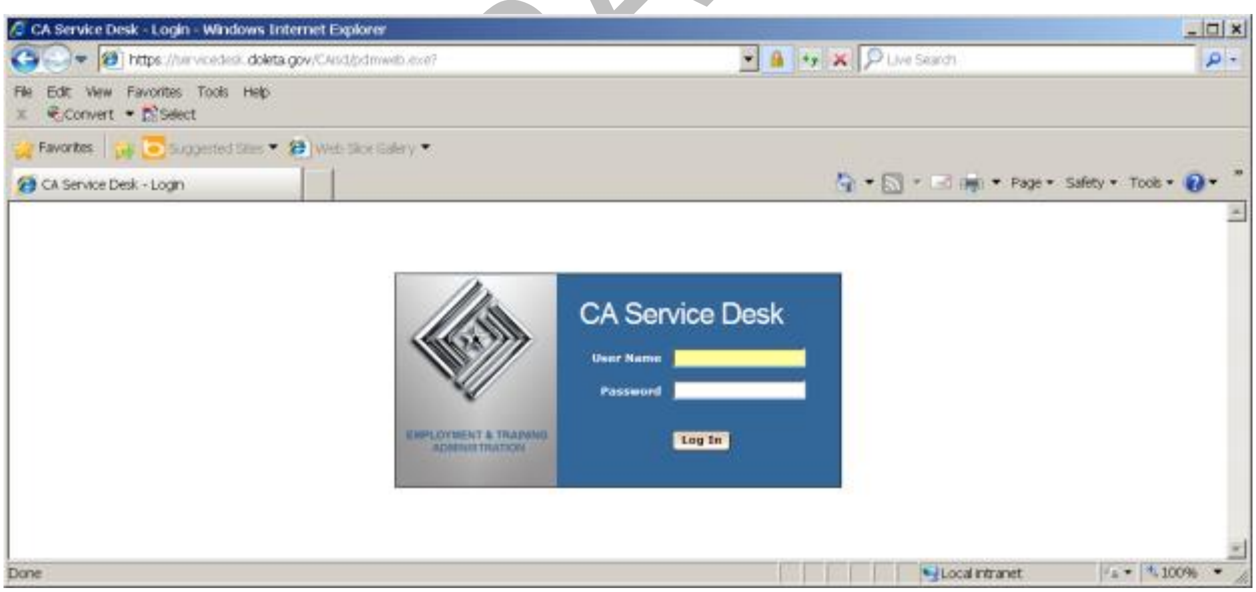

Figure 1 – CA Service Desk login page

The Service Desk employee should enter his or her username and password into the appropriate fields and click the Log In button. The employee should see a browser window similar to this:

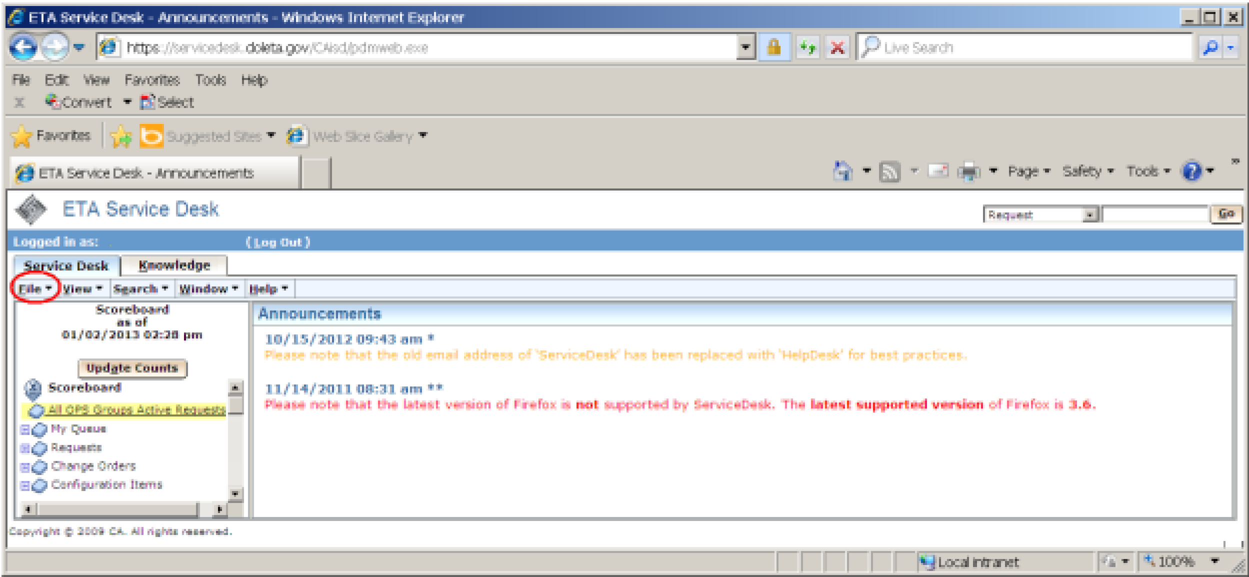

Figure 2 – CA Service Desk front page

Next, the Service Desk employee should click on the File menu and select the New Request menu item.

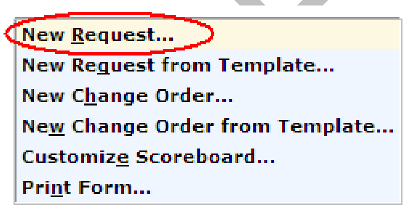

Figure 3 – CA Service Desk File menu

After the New Requests menu item is selected, the web page in Figure 4 will appear:

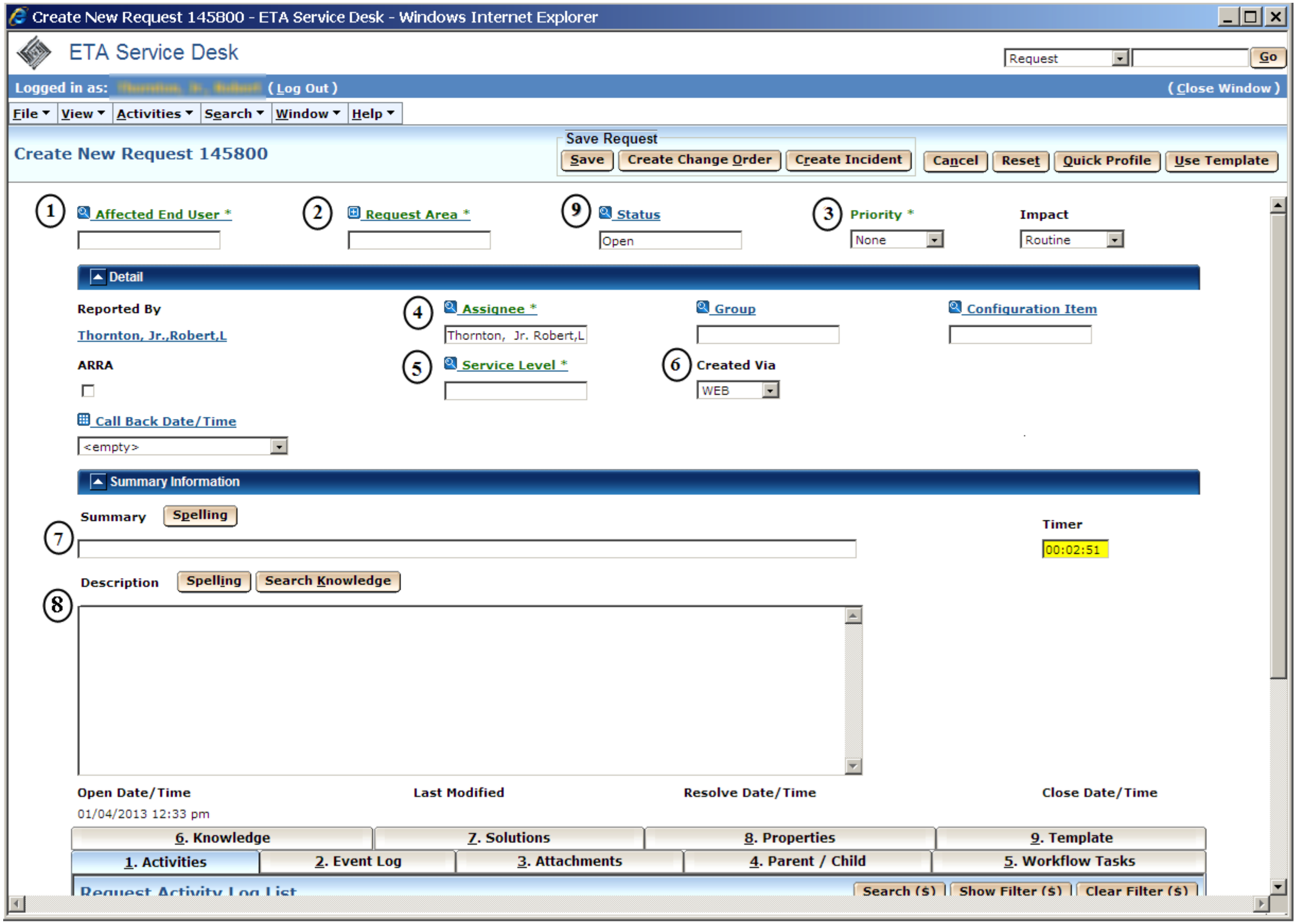

Figure 4 – New Ticket in CA Service Desk with required fields

2.3 Overview of Required Incident-Related Data in Ticket

Once the Service Desk employee has created a new CA Service Desk ticket, he or she must fill out the ticket with the information that was collected from the user. The following fields must be filled in or else the ticket cannot be completed.

1. **Affected End User**: The name of the user who is affected by the incident. This may or may not be the person who reported the problem. The CA Service Desk software allows you to search for and fill this field with a name from the DOL ETA address list (see Section 3.1).
2. **Request Area**: Based on the description of the incident, assign the incident to a specific problem area. The CA Service Desk software allows you to fill in the field from a pre-determined list of problem areas (see Section 3.2 and Section 6, *List of Common Request Area Items*).
3. **Priority**: CA Service Desk defines this field as required, but it does not need to be set. When Service Desk employee creates a ticket, the Priority field's default setting should not be changed.
4. **Assignee**: The name of the Service Desk employee that will be in charge of handling the ticket. The CA Service Desk software allows you to search for and fill this field with a name from the DOL ETA address list (see Section 3.3).
5. **Service Level**: The Service Level parameter should be set to the tier level of the task that is being handled (see Section 3.4 and Section 6, *List of Common Request Area Items*).
6. **Created Via**: Use this drop down menu to select how the problem was submitted to the Service Desk:
7. **Summary**: Provide a brief overview of the problem that has been submitted to the Service Desk.
8. **Description**: Provide a detailed description of the problem that has been submitted to the Service Desk. This field should also include the user's office, room number, and phone number.
9. **Status**: Indicates the status of the ticket: "Open," "Closed," or "Pending."

3 Enter Required Information into Ticket

3.1 Enter Affected End User into Ticket

In order to enter the appropriate ETA user into the Affected End User field, you must locate the user name with the CA Service Desk application. To find the user's name, access the Affected End User database by clicking the underlined field name *Affected User* (see Figure 4, Number 1). The following web page will appear:

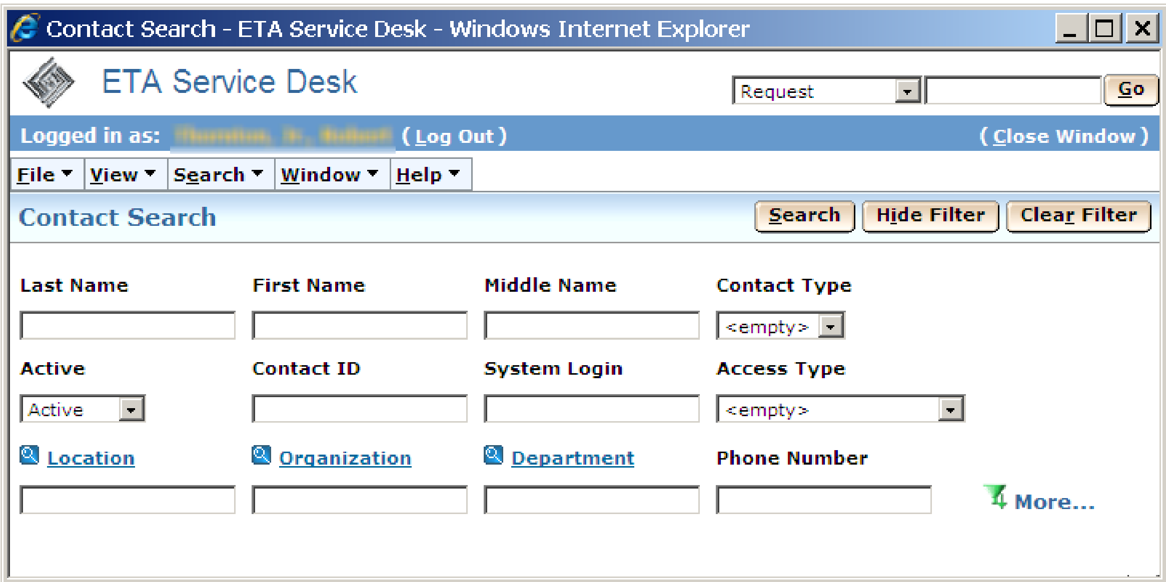

Figure 5 – Filter for Affected User field

Enter the last name of the affected end user into the *Last Name* field. If the Service Desk employee has an incomplete last name, he or she can use the "%" character as a wildcard character. A wildcard character allows the employee to search all of the last names for the characters up to the wildcard (i.e. entering "Smi%" will cause Service Desk to retrieve all the users with last names that begin with "Smi").

Once the last name (or the appropriate text) has been entered into the *Last Name* field, click the *Search* button and a list of search results will appear:

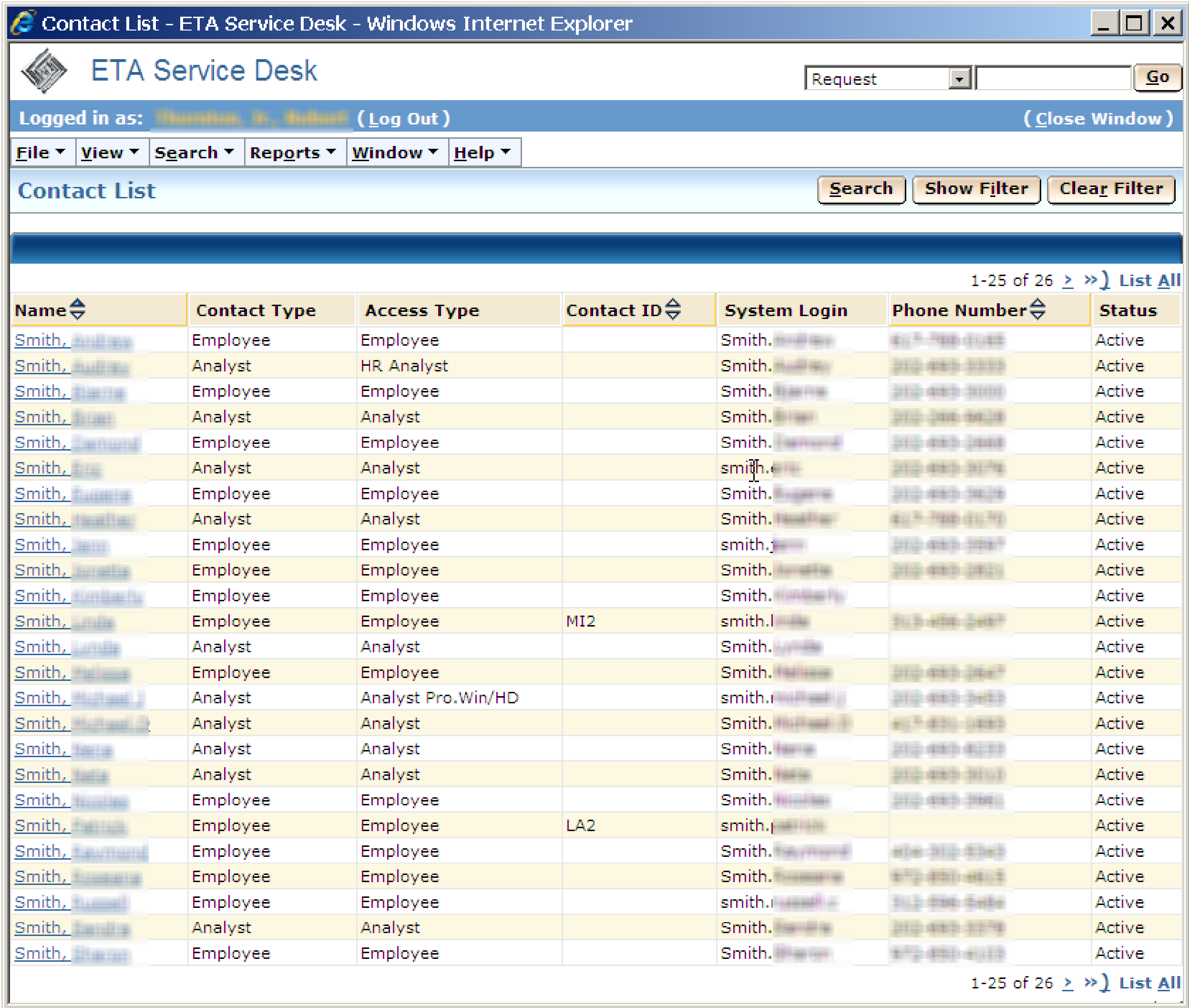

Figure 6 – Results from "Smi%" search of Affected User database

Once the employee has found the target user, click on the user's name and that name will appear in the *Affected End User* field.

3.2 Enter Request Area into Ticket

Before the Service Desk employee can enter the Request Area information into the service ticket, he or she must use Service Desk to locate the proper category from a list of available options. To open the list of options, click on the name of the field (*Request Area*) and a list will appear:

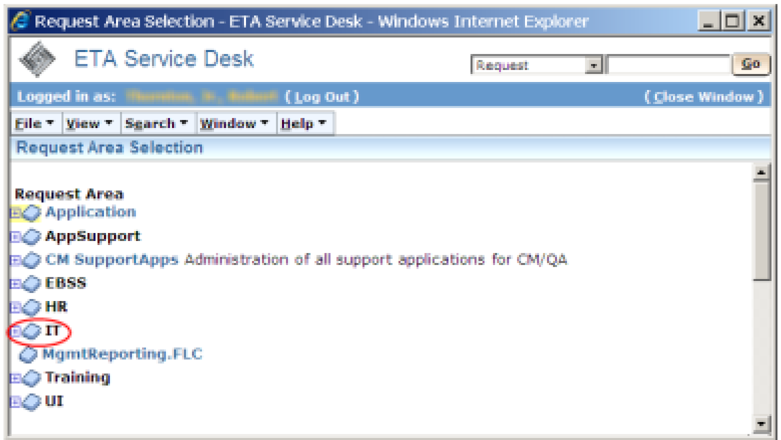

Figure 7 – List of possible entries for the Request Area field

In this example, we will select the Citrix entry, which belongs in the Network category, and which in turn belongs to the IT category. First, we will click on the box next to the IT category and the following window appears:

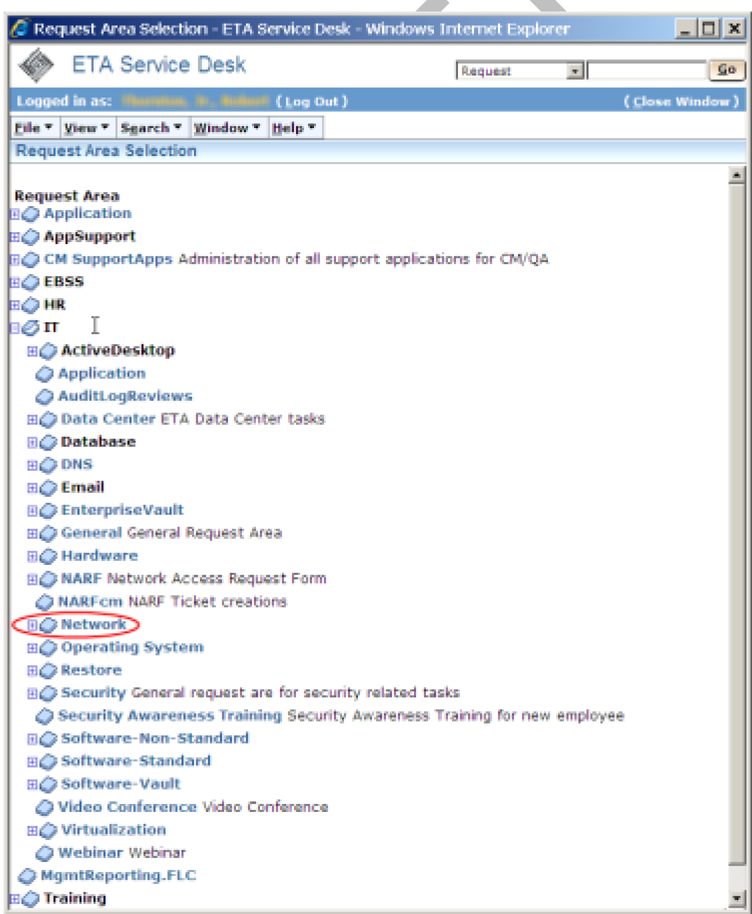

Figure 8 – List of possible entries for the Request Area field (IT category)

Next, click on the box next to Network and a new set of options appears (see Figure 10).

Double-click on the word *Citrix* once it appears on the screen and the software will return you to the main screen with the appropriate information in the *Request Area* field:

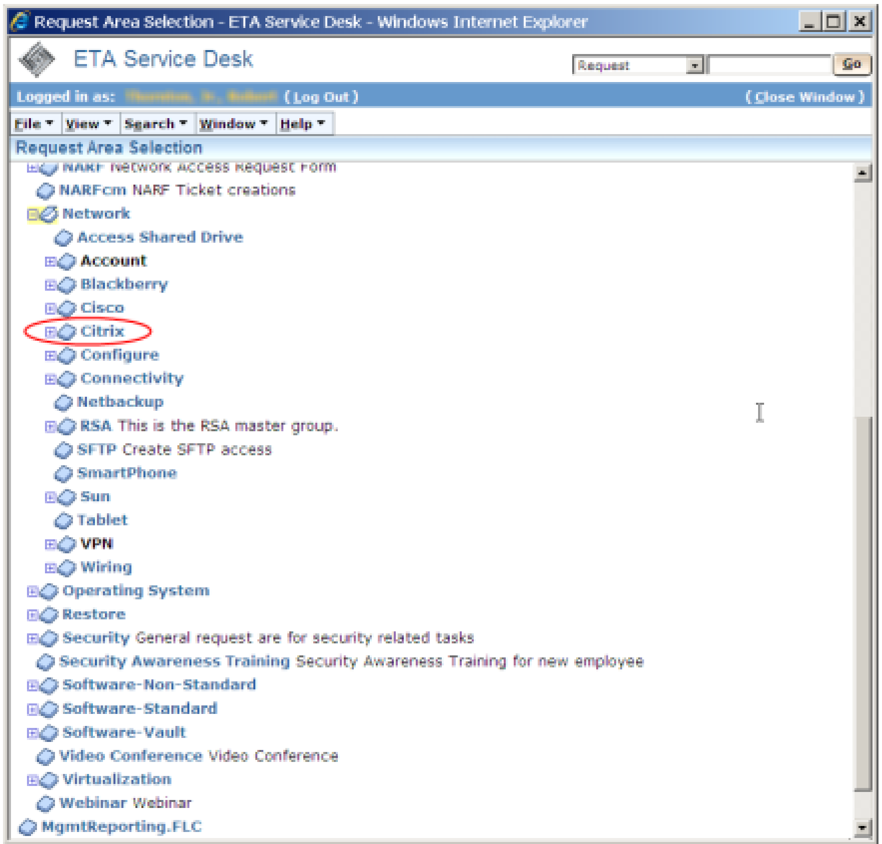

Figure 9 – Request Area field filled out with *IT.Network.Citrix* entry

3.3 Enter Assignee into Ticket

In order to assign this ticket to a Service Desk employee, you must use the CA Service Desk to locate the name of the employee in its database. Click the underlined *Assignee* text on the main service ticket page and the following window will appear:

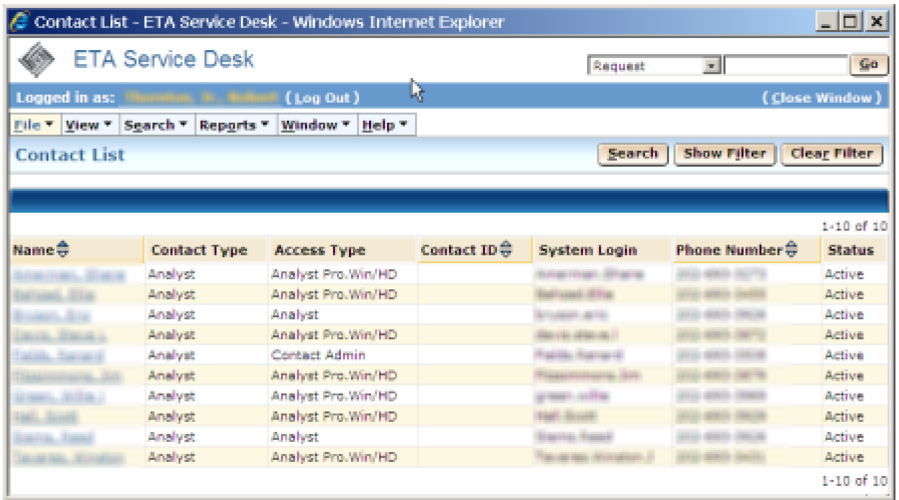

Figure 10 – List of entries in the Assignee database

To locate the Service Desk employee who will be in charge of resolving this ticket, you will need to use the Service Desk filter. Click the *Show Filter* button and the following window will appear:

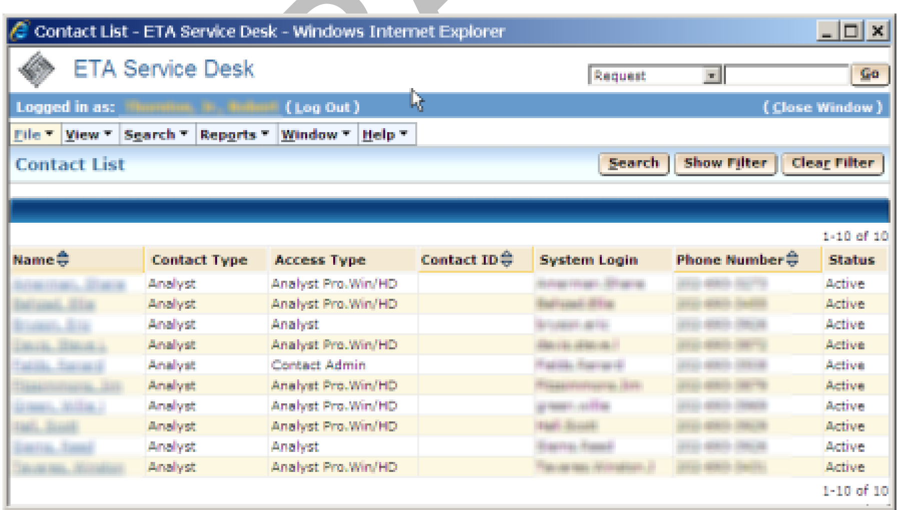

Figure 11 – Show Filter command reveals Assignee filter function

This filter operates exactly as the filter used by the *Afflicted End User* field, so you may use the character "%" as a wildcard if necessary. To search for the user that will be entered into the Assignee field, enter the appropriate text in the *Last Name* and *First Name* fields and click the *Search* button to retrieve the user's entry. Once the user's entry appears, click on the user's name and that name will appear in the Assignee field.

If the Assignee search generates more than one response, use the other information (Agency, etc.) to determine which entry should be placed into the *Assignee* field.

3.4 Enter Service Level into Ticket

To complete the ticket, you must determine what service level is appropriate for this ticket and then enter that level into the ticket using CA Service Desk. To determine which level of service is appropriate, refer to Appendix X for more information. Once you have determined what level of service should be entered into the ticket, click on the underlined *Service Level* text and the following window appears:

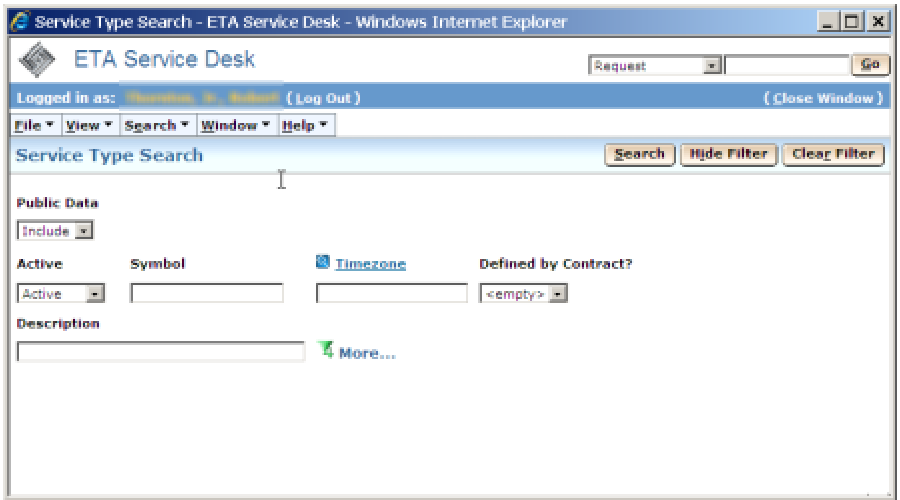

Figure 12 – Service Level search window

Click on Search and the following window appears:

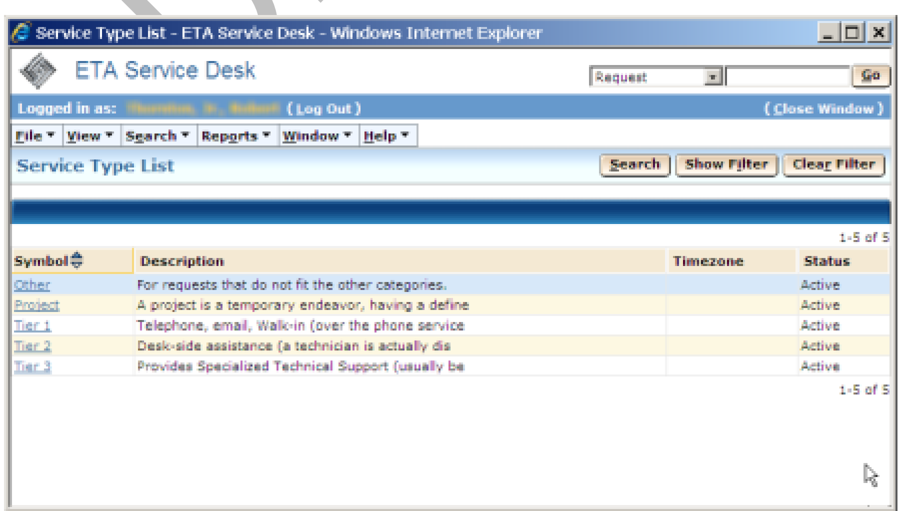

Figure 13 – Possible values for the Service Level field

Click on the appropriate text in the *Symbol* column. The window will disappear and you will be returned to the main window that text will appear in the *Service Level* field

3.5 Enter Summary into Ticket

To enter information into the Summary field, click on the field and type a brief summary of the problem that is covered by the ticket.

3.6 Enter Description Into Ticket.

To enter information into the Description field, click on the field and type a detailed overview of the problem that is covered by the ticket.

4 Enter Ticket into Database

Once all of the required fields have been filled out, click the Save button in the top right corner of the ticket window (see Figure 14 below). Once the ticket has been saved, you will see a window similar to Figure 15.

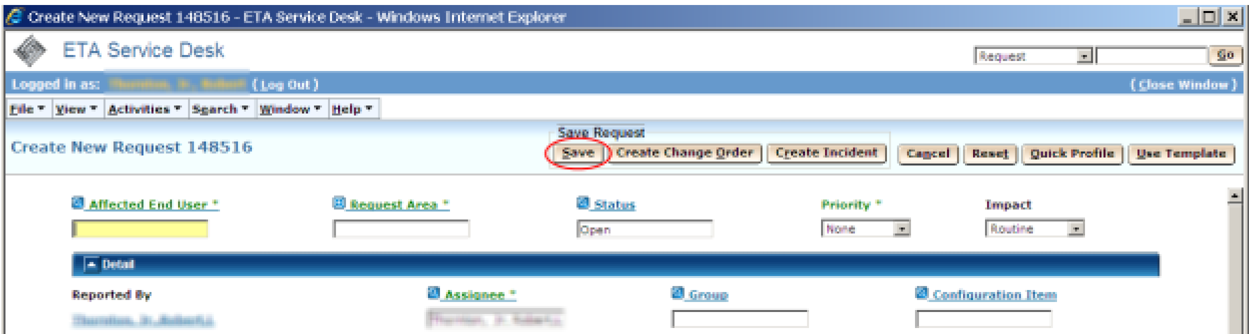

Figure 14 – Location of the Save button in CA Service Desk

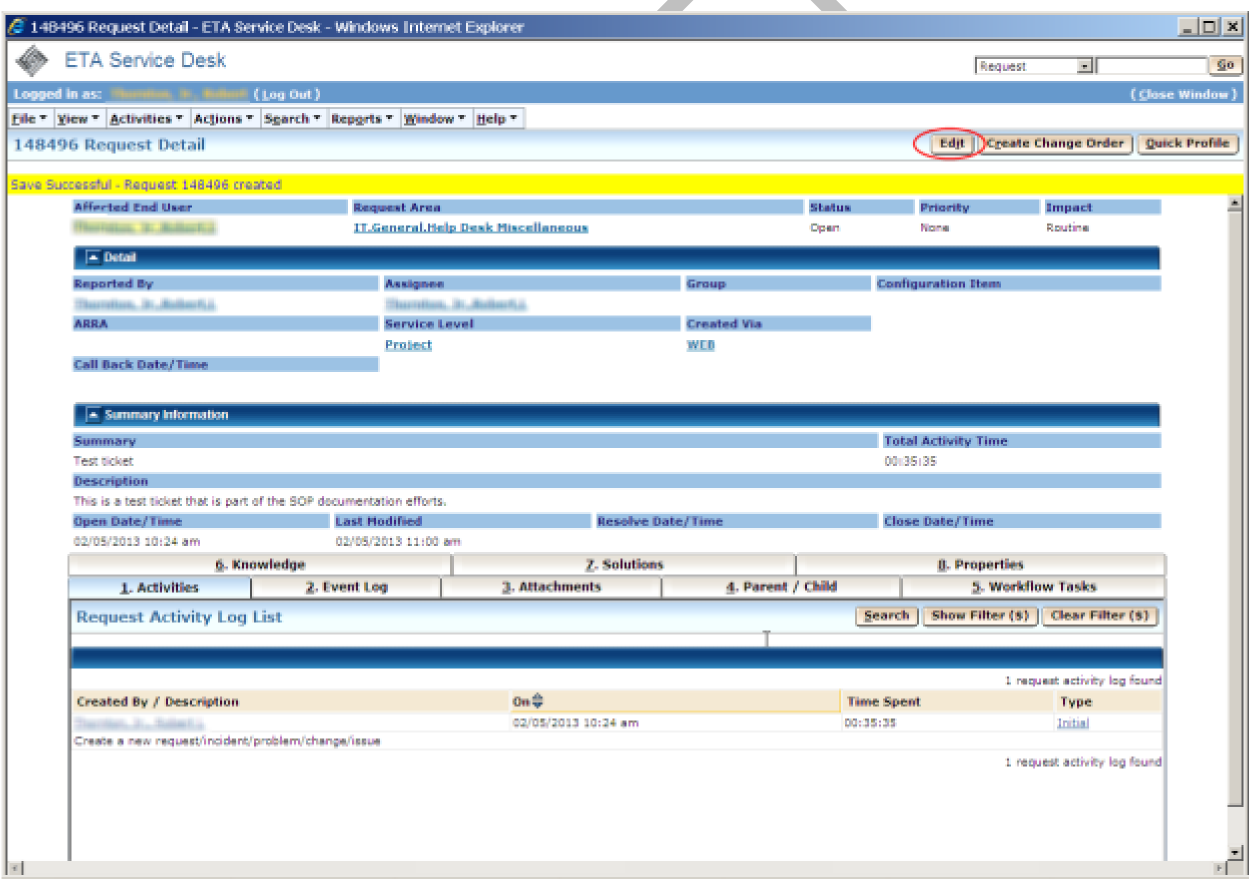

Figure 15 – A new ticket that has been saved in Service Desk

5 Updating a Current Ticket

5.1 Open a Current Ticket

Often, you will have to update a ticket that you have already created. To do so, find the *My Queue* menu item on the left side of the ticket window and click on it to reveal a list of submenu items (see Figure 16).

Figure 16 – Locating the My Requests link

Then click on the *My Requests* and a screen similar to this one will appear:

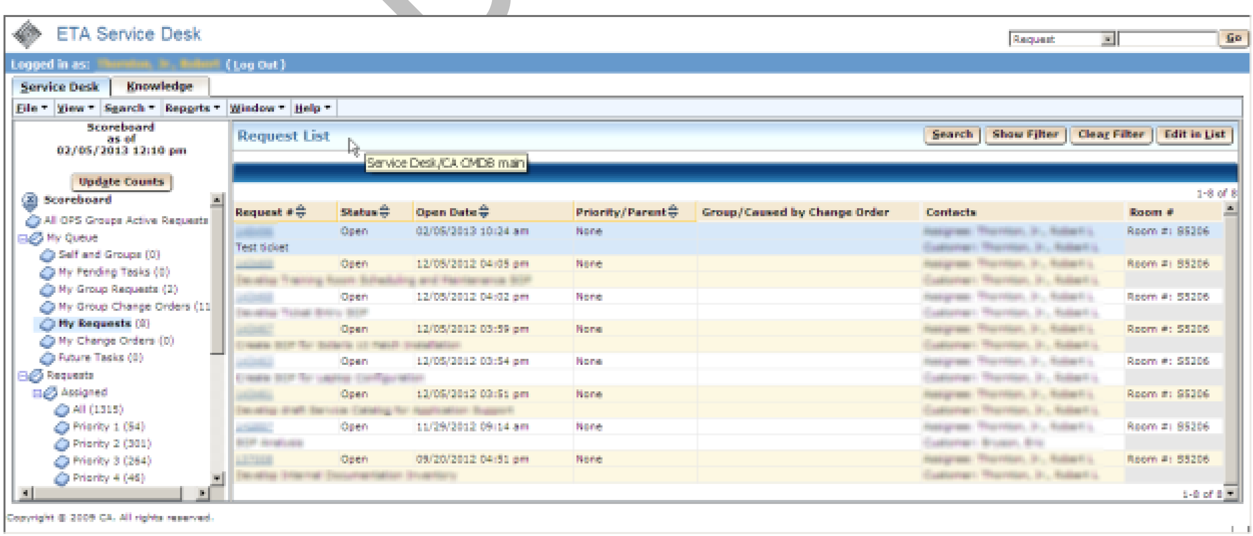

Figure 17 – Available tickets contained in the Activities List

To edit a ticket, click on the number above the ticket's title and you will open the ticket:

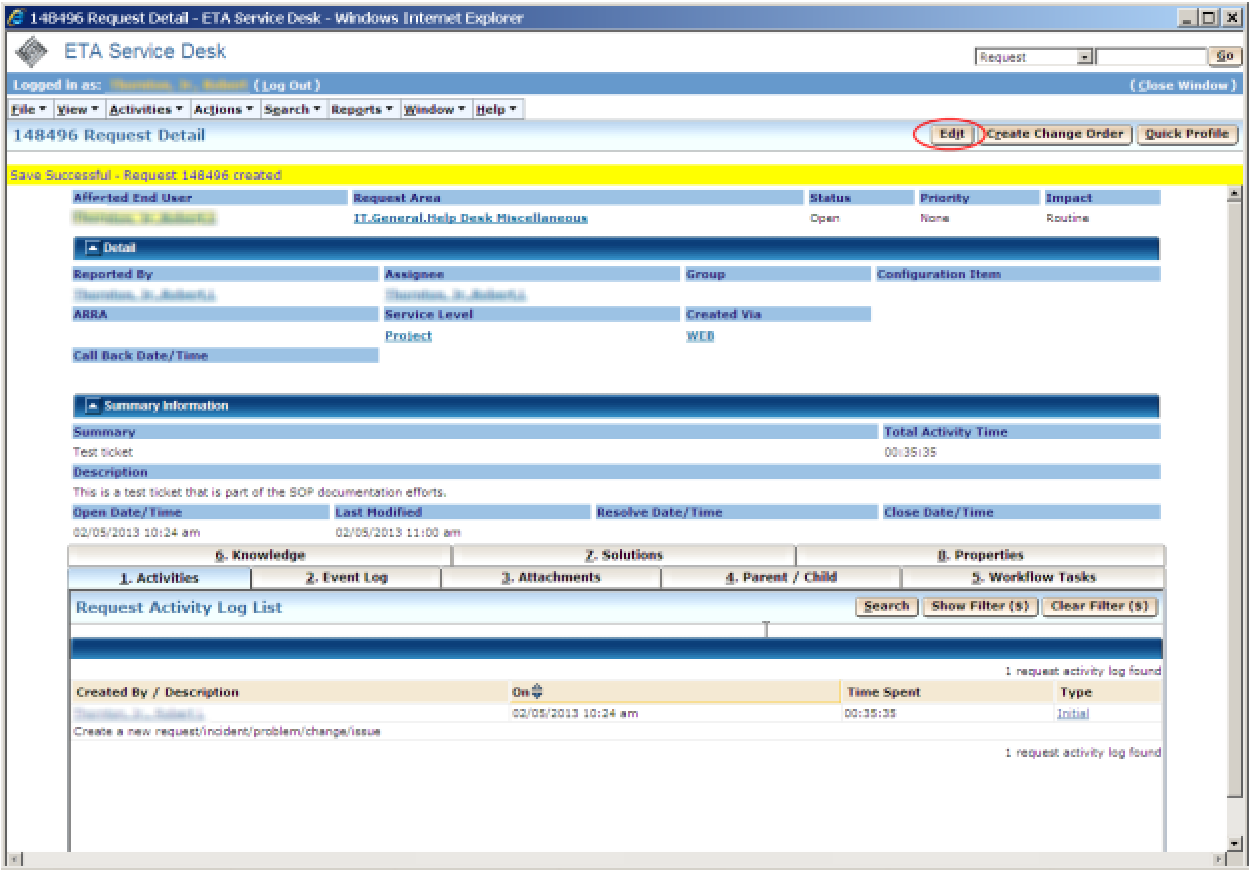

Figure 18 – An open ticket in CA Service Desk

5.2 Adding to the Activity Log List

Once you have opened a ticket or a ticket has been assigned to you, you will need to update a ticket. For example, the ticket has been placed on hold until a fix arrives, the problem has been resolved, or other changes in the situation have occurred.

When changes occur, the ticket is updated by adding a new entry to the Activity Log List. To create a new entry in the Activity Log, click on the *Activities* menu item near the top of the ticket window and select the *Update Status* command. A window similar to the one in Figure 19 will appear:

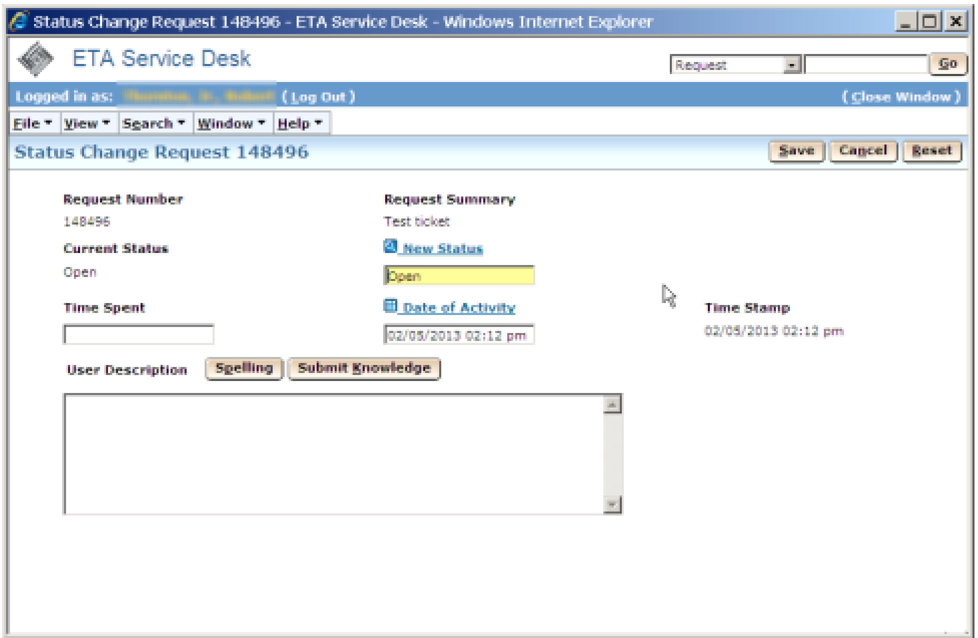

Figure 19 – Window for adding an entry to the Activity Log List

Enter any new information into the *User Description* field. If necessary, you can close the ticket by clicking the *New Status* link and making the appropriate changes as previously discussed. You may also alter the date on which the change occurred by clicking on the *Date of Activity* field.

To close the new entry in the Activity Log List, click the *Save* button in the top right corner of the window and a window similar to Figure 20 appears.

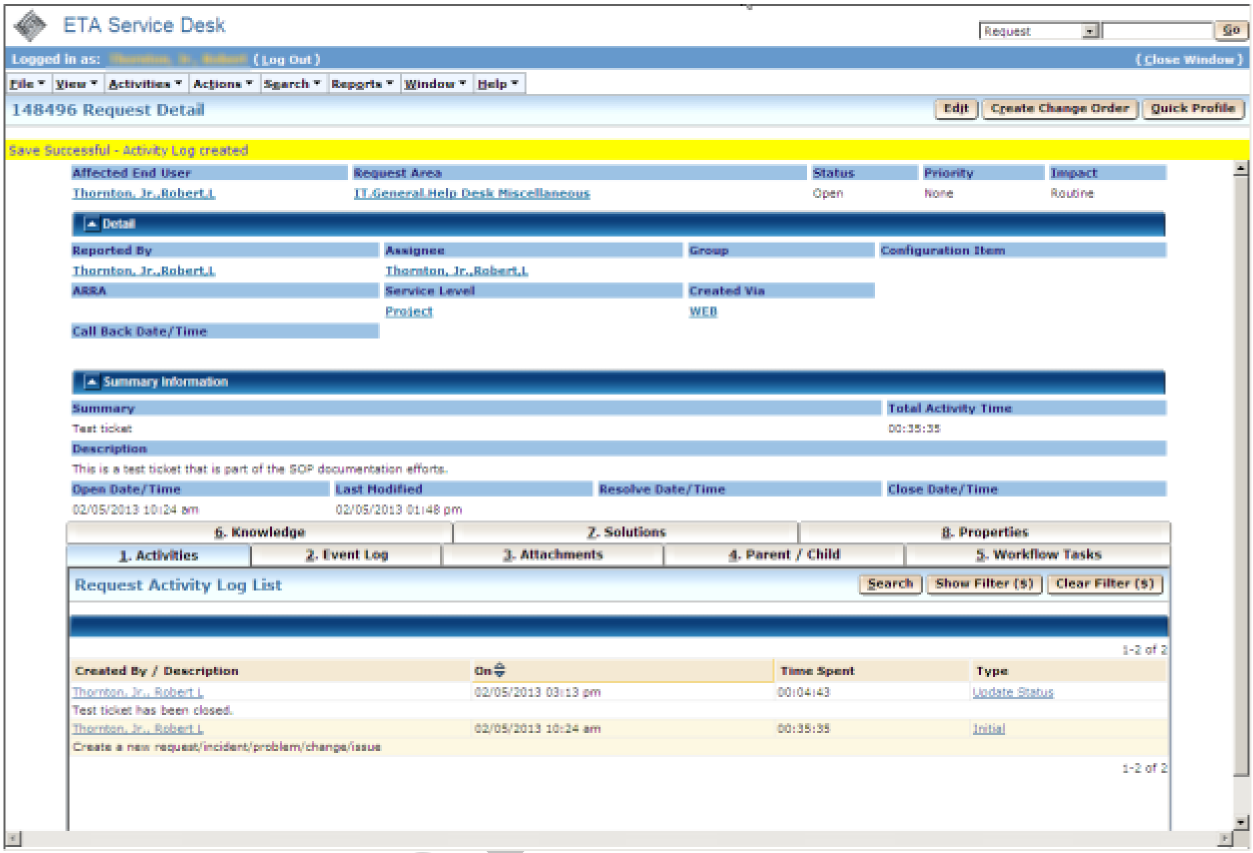

Figure 20 – New Activity Log List entry has been added to a ticket

6 List of Common Request Area Items

Tier 1

Miscellaneous: *IT.General.Help Desk Support*

OIST Weekly Report: *IT.General.Help Desk Miscellaneous*

Replace Toner: *IT.Hardware.Printer (Driver, Toner, Cords, etc.)*

Create New User Account: *CM SupportApps.USD.account creation*

Security Awareness Training: *IT.Security Awareness Training*

Basic printer issues: *IT.Hardware.Printer.Cannot Print*, *IT.Printer.Printer (Driver, Toner, Cords, etc.)*

Unlock Account: *IT.Network.Account.Unlock*

Mouse/Keyboard: *IT.Hardware.Peripheral (Monitor, Mouse, Keyboard, Surge Protector, etc.)*

Tier 2

Miscellaneous: *IT.General.Help Desk Support*

Computer-related issues (including moves): *IT.Hardware.Desktop* and *IT.Hardware.Laptop*

Basic network hardware issues: *IT.Network.Wiring*

Basic printer issues: *IT.Hardware.Printer.Cannot Print*

Software-related issues (basic): *IT.Software-Standard.Microsoft, IT Software-Standard.Desktop Authority/Script Logic*

Tier 3

Advanced network issues: All the categories under *IT.Network* except *IT.Network.Wiring*

Advanced printer issues: *IT.Hardware, IT.Hardware.Printer.Cannot.Print*

Software-related issues (advanced): *IT.Software-Standard.Microsoft, IT Software-Standard.Desktop Authority/Script Logic*

Email-related issues: *IT.Email.Account*