VERMONT LANDESK

Account Approvers

Accounts needing prior approval:

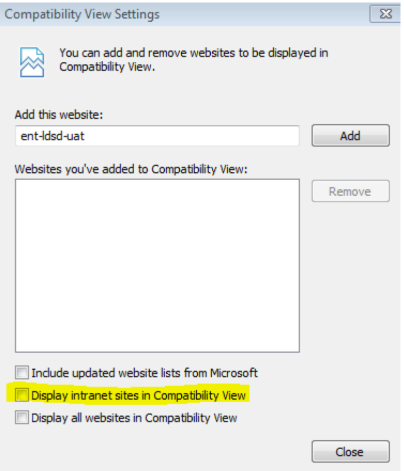
AHS only: There are a few AHS accounts that require approval before the account requests are sent to an analyst to create the account. They will be forwarded to the appropriate account approvers as part of our workflow behind the scenes. Approval/rejection by an account manager must occur before the request can proceed to an analyst to create/terminate the accounts.

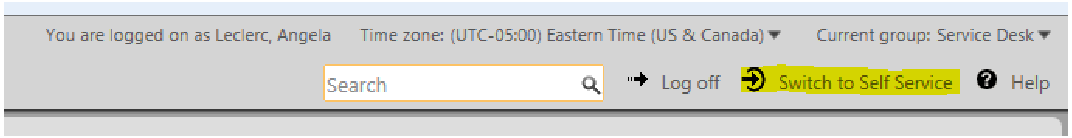
- ACCESS
- LANDesk Account
- Medicaid Analytics
- Medicaid Pharmacy Claims
- MMIS
- OnBase
- VHC

Submit New Request Support

Self-Service Console (Self Service)

From Analyst Web Desk, click on Switch to Self Service to switch to the Self Service Dashboard.



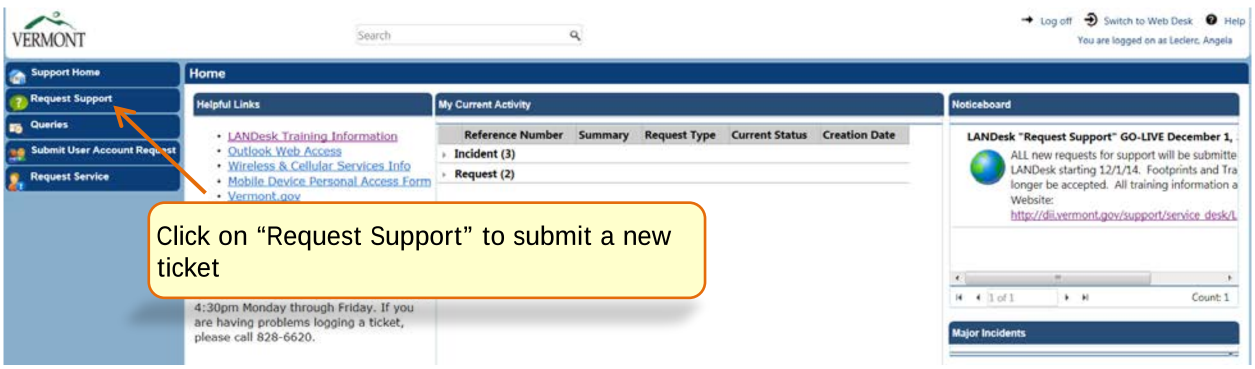


**<u>If you are on IE, and do not see this option, you need to edit your Compatibility View Settings</u>

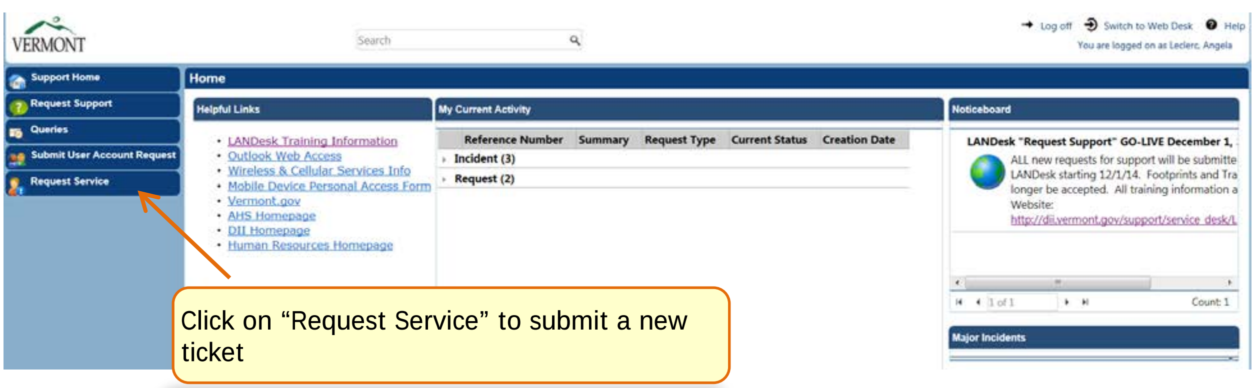
Tools → Compatibility View Settings → Uncheck Display intranet sites in Compatibility View

Click on "**<u>Request Suppor</u>**t" from the Self-Service Dashboard to submit new **<u>break/fix</u>** ticket (incident – FIX IT)

> **NOTE:** You, as approvers can also submit a Request Service. However, this should only be used if you understand the difference between Request Support and Request Service. When in doubt, use Request Support.



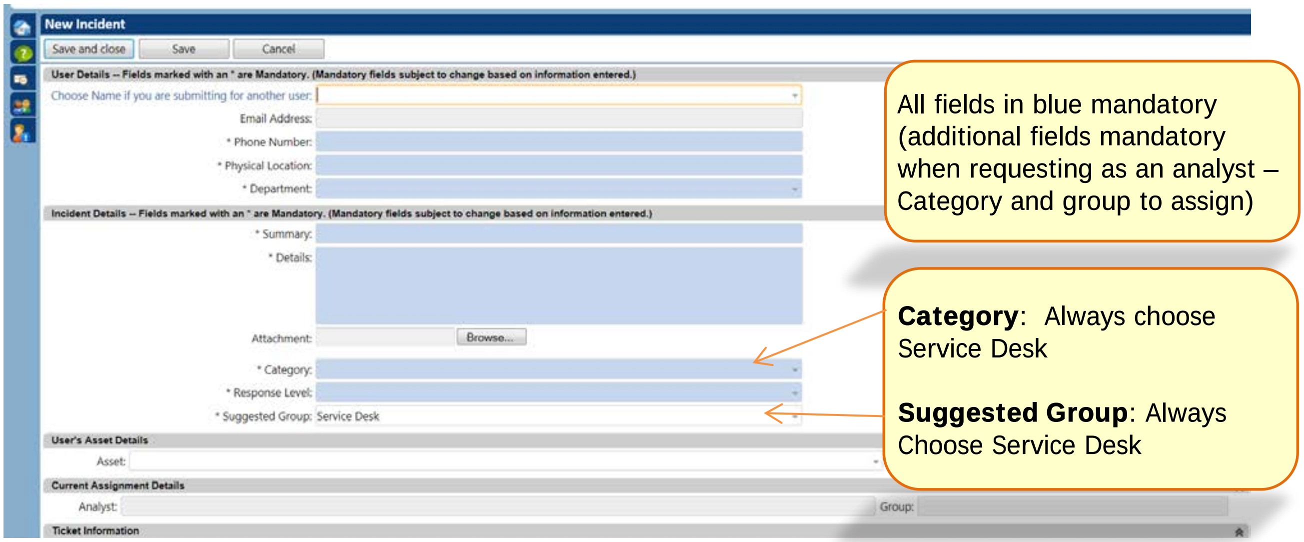
If your request is for service, then you can click on the "Request Service" button. (GET IT - this is for purchasing requests, installations, new firewall configs, etc.)



The screen below will open. Because you are submitting as an analyst, there are a few more mandatory fields that will need to be filled out before you can submit the ticket.

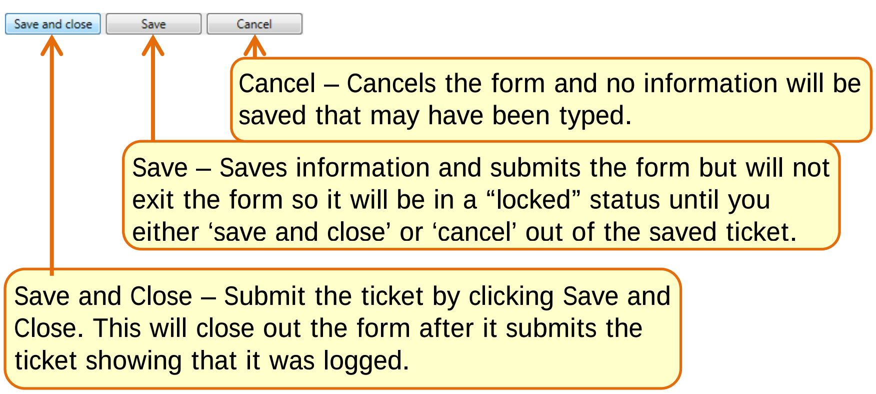
Additionally, you will need to fill in the Category and Suggested group. Again, you as approvers may not know.

****Always choose <u>Service Desk</u> for both and the Service Desk will triage to the appropriate group. Let our DII Service Desk triage to the appropriate group.**



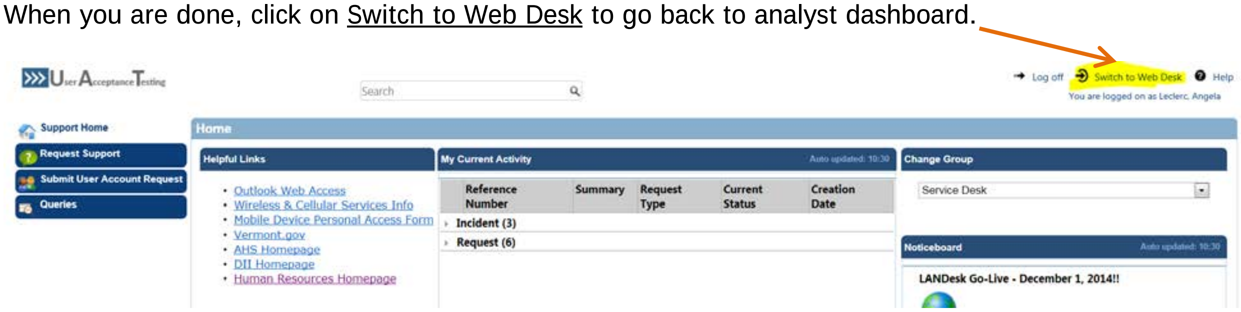
When to choose "Save and close", "Save", or "Cancel" When Submitting a Ticket:

When finished with the form, you will have the following options.



Analyst Console (Web Desk)

When you are done, click on <u>Switch to Web Desk</u> to go back to analyst dashboard.



Submit User Account Request

User account requests can only be submitted by an **<u>SOV employee</u>** authorized as a User Account Requestor for their department. For more information, please see the UAR Guide: <u>http://dii.vermont.gov/sites/dii/files/PDF/Support/User-Account-Request-Guide.pdf</u>

Before a person can be a requestor they must be authorized by their depatment point of contact: <u>http://dii.vermont.gov/sites/dii/files/PDF/Support/AHS-Points-of-Contact.pdf</u>

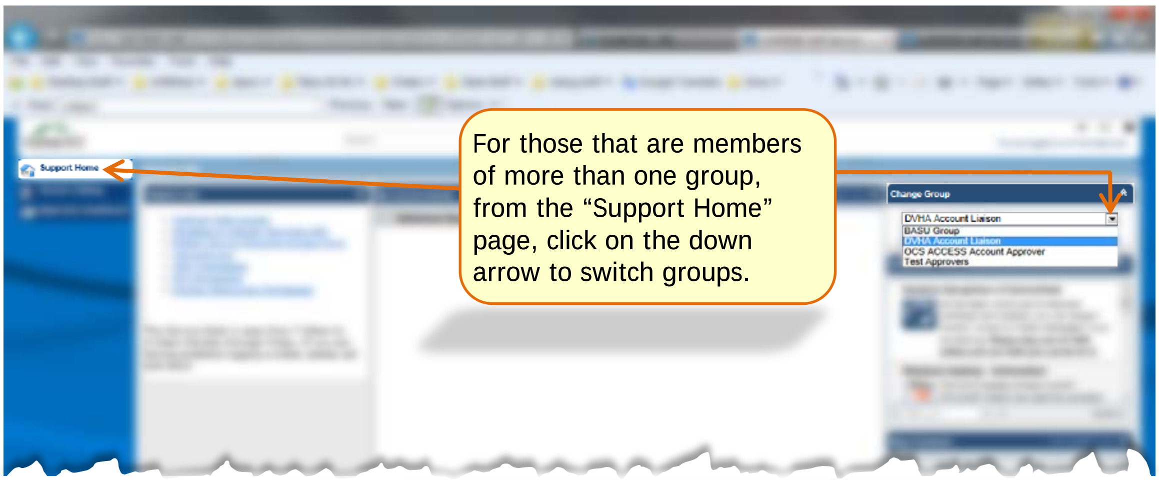
Account Approvers:

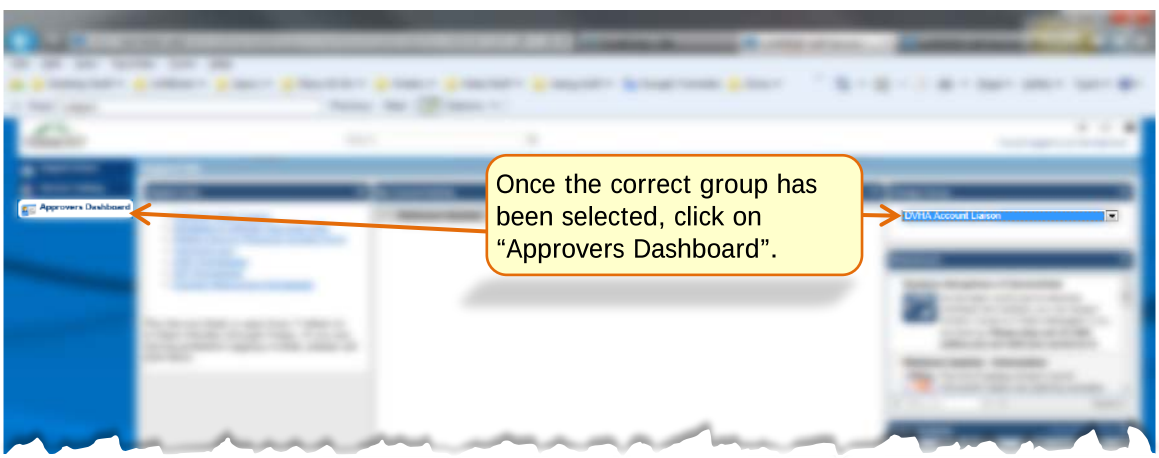
Self-Service View

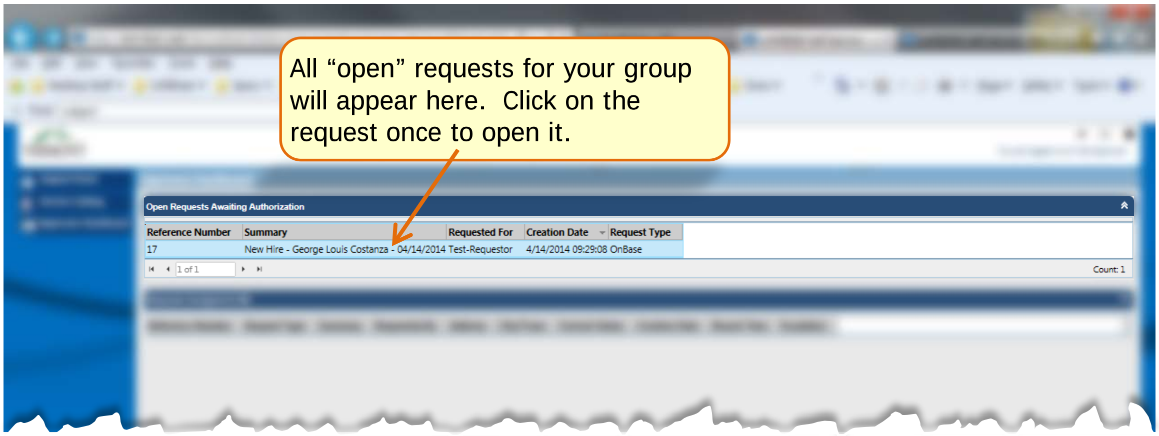
Those identified as an account manager will receive an email that a request is Open/Awaiting Manager Authorization. The email will contain the User Account Request (UAR) number, the user name, and effective date.

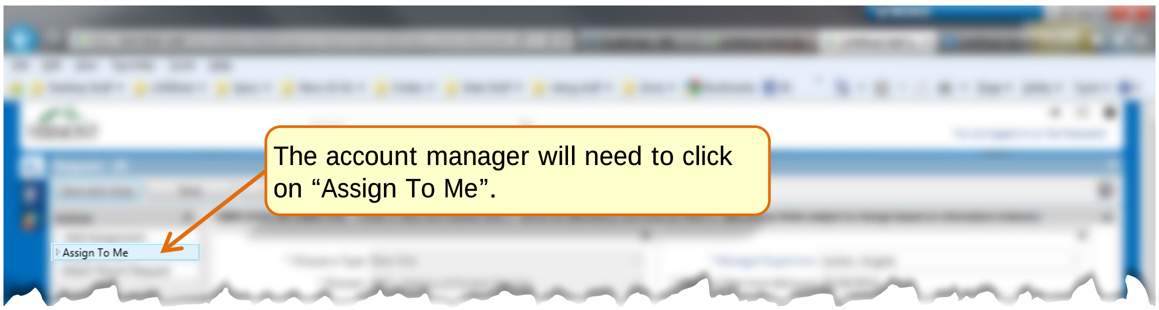
***NOTE: Never change the subject line of a notification from LANDesk because that is how LANDesk identifies with the request. Any changes made to the subject line may result in a lost email response.

NOTE: NEVER PUT ACCOUNT CREDENTIALS IN A REQUEST OR IN AN EMAIL.***






All “open” requests for your group will appear here. Click on the request once to open it.
Open Requests Awaiting Authorization
Reference Number
Summary
Requested For
Creation Date
Request Type
17
New Hire - George Louis Costanza - 04/14/2014
Test-Requestor
4/14/2014 09:29:08
OnBase
1 of 1
Count: 1

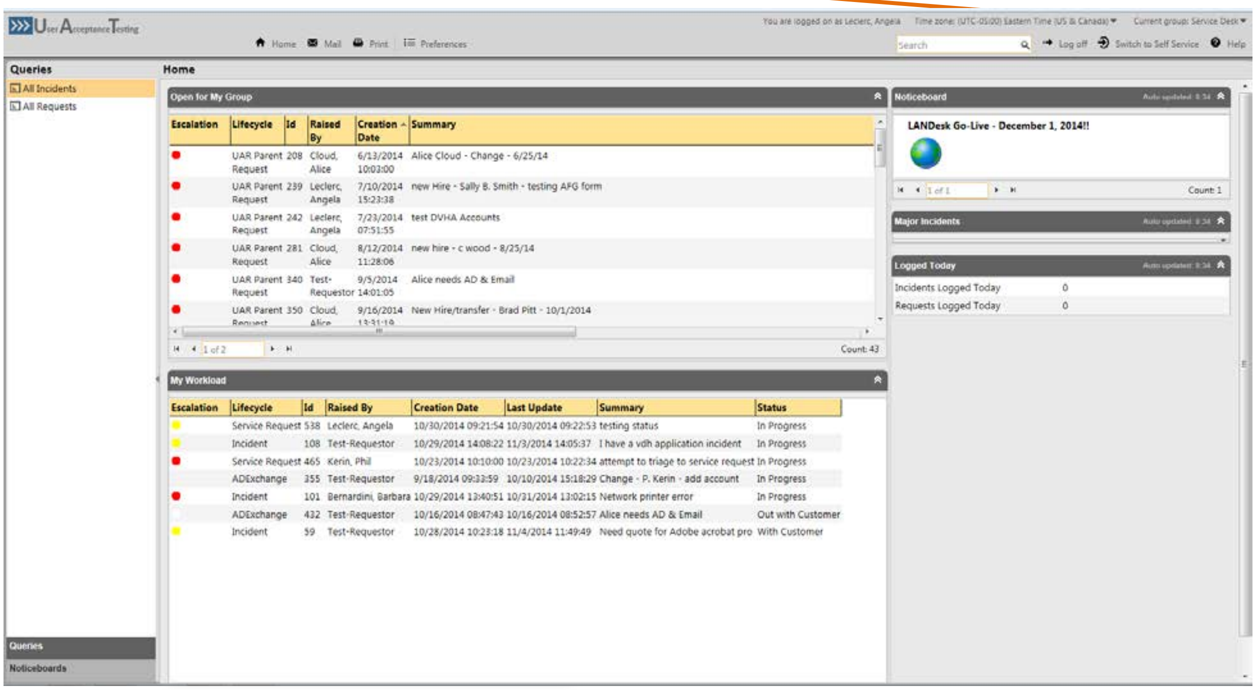

The account manager will need to click on “Assign To Me”.
Assign To Me

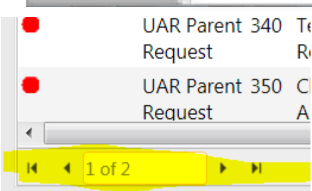
Web-Desk View (Main Dashboard)

Open/Unassigned tickets for your group

Click on the **Home** button to view your Main Dashboard. The top query is all incidents and service requests (including UAR requests) open for your group that are unassigned. You can click on the ticket number and assign the ticket to yourself.

The bottom section entitled "My Workload" is everything that is assigned to you. Both of these queries will exclude resolved, closed, and survey completion tickets. Those are available to be viewed on the Queries (see Queries below). ****NOTE:** Remember, if you belong to more than one group, you have to check which group you are viewing. Click on the current group dropdown to change your group.



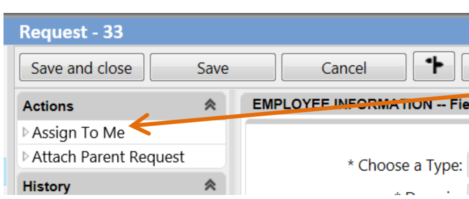


Please note the pages – you may have to scroll through pages, or click on columns to sort different.

Assigning Tickets

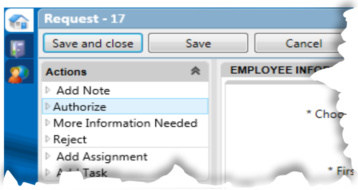
Only one analyst group or one analyst can be assigned at one time to a ticket. Below is information on how to re-assign if needed, or add Tasks and Child incidents/requests to assist you in completing your work if needed.

Assign to Me for Open Tickets

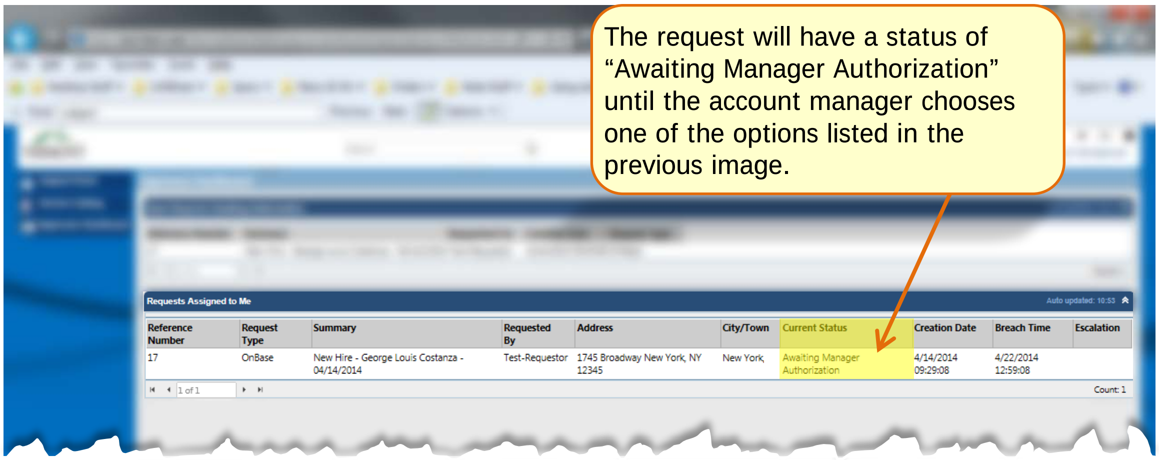


Click once on the open incident or request to open the request form and click "Assign to Me". The request will disappear from the "Open for My Group". It will now be viewed from the "My Workload" section of the Dashboard.

Once it has been assigned, the requestor will receive an email that the request has been assigned. The email will contain the User Account Request (UAR) number, the user name, and effective date. It will also state who it has been assigned to.



The account manager will then return to the request form with the following action options. Add Note, Authorize, More Information Needed, and Reject.

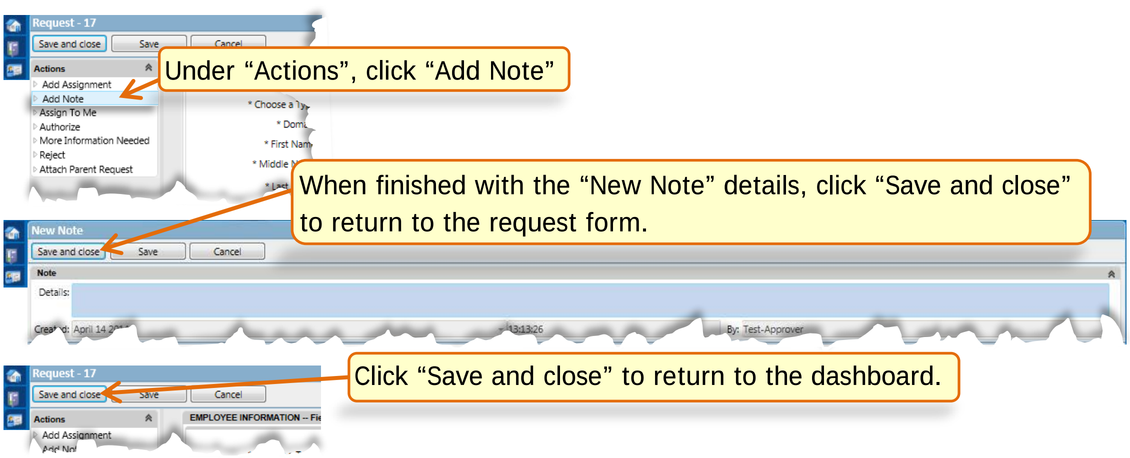


Click on one of the following for more information on each action:

Add Note
Authorize
More Information Needed
Reject

Add Note

To interact with the request – perhaps ask a question, use the "Add Note" action. This will be added to the existing request, and email the support analyst handling the request. Go to the dashboard and click on the request to open it.



The requestor will receive an email informing them that their request has been updated. The status will not change from "Awaiting Manager Authorization".

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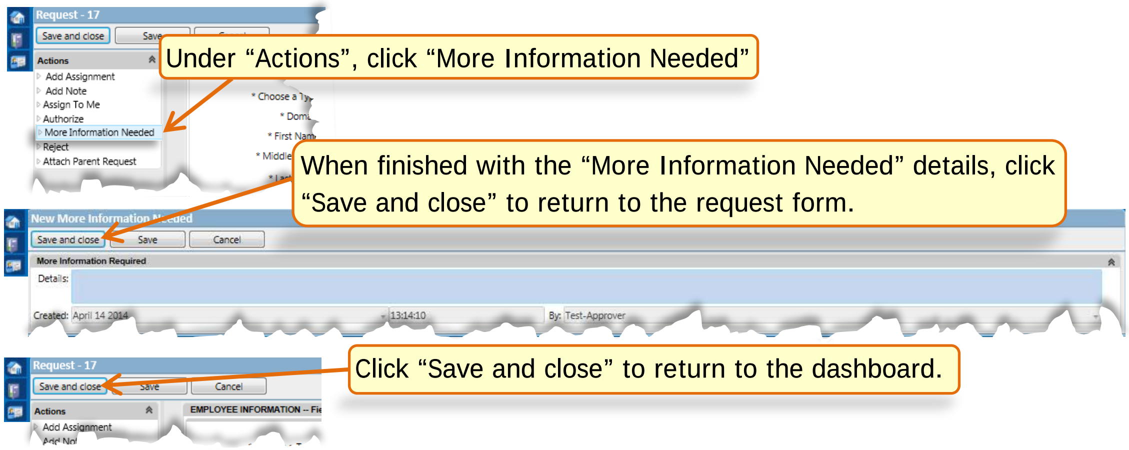
NOTE: NEVER PUT ACCOUNT CREDENTIALS IN A REQUEST OR IN AN EMAIL.

More Information Needed

Once the request has been submitted, the account manager may request more information. The requestor will receive an email containing the User Account Request (UAR) number and what information the account manager is requesting.



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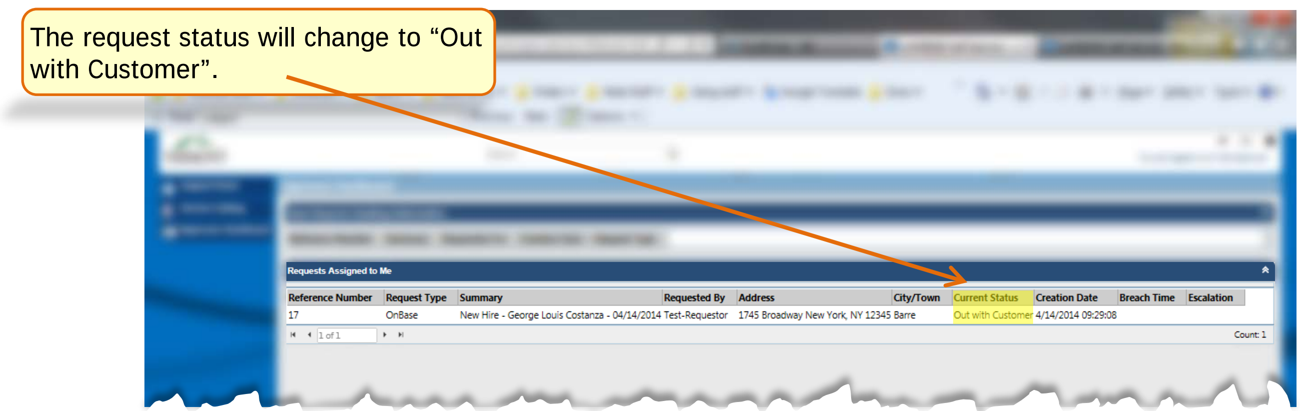
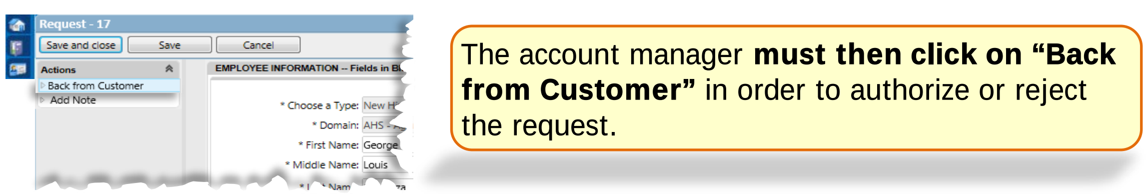
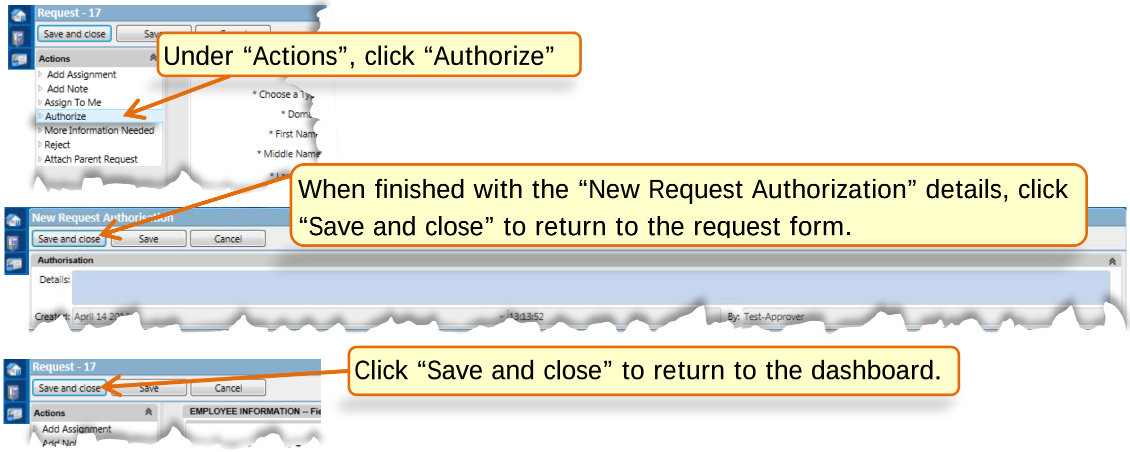


<u>Once the customer responds</u>, it will be added to the "Notes" tab located at the bottom of the child request.



Authorize

Once the account manager authorizes the request, the New Request Authorization form will open. The account manager will need to enter the details then choose "Save and close".

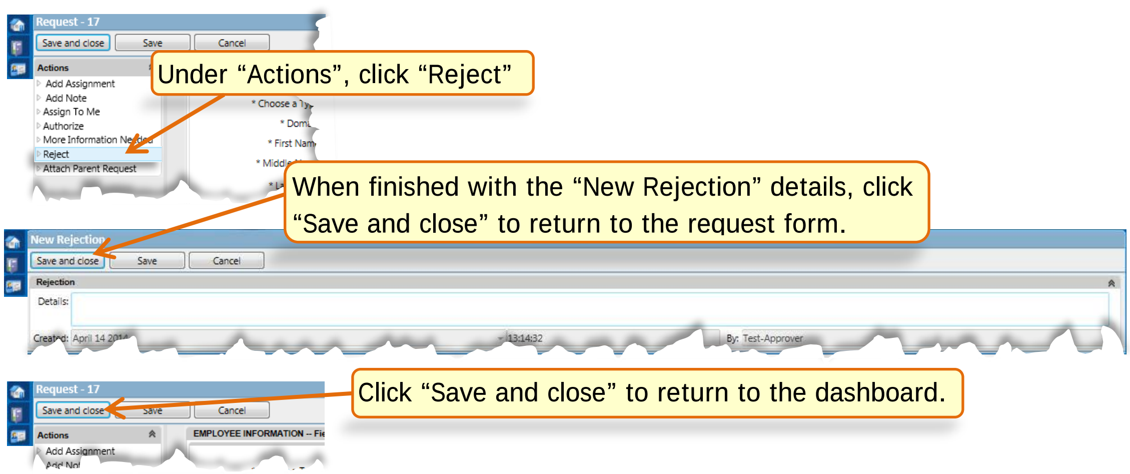


The requestor will receive an email stating that the account has been authorized. The request will then be assigned to the appropriate analyst group. An email will be sent that contains the User Account Request (UAR) number and that it is awaiting assignment from an analyst. The request will disappear from the account manager’s dashboard.

Once the account request is assigned to an analyst, the requestor will receive an email stating that it has been assigned and to which analyst.

Reject

When the account manager rejects a request, the “New Rejection” form will open. The requestor will receive an email informing them that it has been rejected. The email will contain the User Account Request (UAR) number and the reason it was rejected.



When a request is rejected, it is automatically closed. The requestor will receive a final email stating that the request has been closed, and the request will disappear from the dashboard.

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