



Account Manager Approvers

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Overview

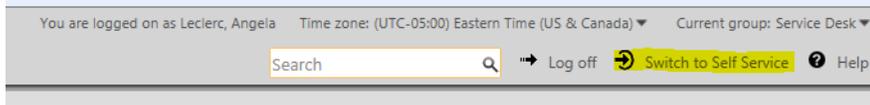
There are a few AHS accounts that require approval before the account requests are sent to an analyst to create the account. As part of the workflow behind the scenes, the request will be forwarded to the appropriate account approvers. Approval/rejection by an account manager who is an approver must occur before the request can proceed to an analyst to create/terminate the accounts. This guide is to help account managers understand the LANDesk consoles available and the actions within the consoles that should take place in a request.

AHS Accounts needing prior approval:

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

Internet Explorer Compatibility View

If you are using Internet Explorer, you may need to edit your Compatibility View Settings to have the ability to switch between the 2 consoles available to approvers. If you do not see the Switch to Self Service option that is highlighted in



this screen shot:

Go to IE Tools → Compatibility View Settings → Uncheck Display intranet sites in Compatibility View



2 LANDesk Consoles

When an Account Manager logs into LANDesk they have the ability to switch back and forth between two consoles that are available. Each console has specific abilities; one to handle submitted tickets and one to submit your own tickets. Depending on what ticket actions you need to take will determine which console you will need to open. The "Web Desk" console is the default log in console that shows up for Account Managers and analysts to handle the requests that come in from users. The "Self Service" console is what typical users see and is available to switch over to if a request needs to be submitted for IT support or user account requests. The following descriptions will help you navigate between and inside the two different consoles. → Log off → Switch to Self Service OR → Log off → Switch to Web Desk

Web-Desk Console View (Main Dashboard)

Open/Unassigned tickets for your Group

Click on the **Home** button to view your Main Dashboard for approving account requests. The top query is UAR requests open for your group that are unassigned. You can click on the ticket number to open the ticket and then assign it to yourself.

****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 and a list should appear.

A screenshot of the LANDesk Main Dashboard. The 'Home' section is active, showing a table of unassigned tickets. The 'Open for My Group' button is circled in red. A dropdown menu for the current group 'ESD ACCESS Account Approver' is open, showing other groups like 'Service Desk' and 'VNA Account Liaison'. A yellow callout box points to the table with the text: 'On the "Main Dashboard", everything in "Open for My Group" is unassigned. Only tickets for your current group will show.' Another yellow callout box points to the 'My Workload' button at the bottom left with the text: 'My Workload are all tickets assigned to you. See next screen shot for continued view of "Main Dashboard".'

Escalation	Lifecycle	ID	Raised By	Creation Date	Summary
	ESD Access	11917	Palmer, Laurie	12/15/2014 14:51:57	need access to DOC and VCAS
	ESD Access	12047	Thomas, Tara	12/15/2014 10:25:30	new hire
	ESD Access	12059	Hopkins, Suzanne	12/16/2014 10:49:27	Melissa Conly- Close ACCESS
	ESD Access	12077	Hopkins, Suzanne	12/16/2014 11:28:17	Lynn Holland-Kelner- Close
	ESD Access	12091	LeBoeuf, Tracie	12/16/2014 12:03:46	MF - TSO needed for new
	ESD Access	12092	Hopkins, Suzanne	12/16/2014 12:04:58	Linda Gochie- ACCESS
	ESD Access	12106	Hartman, Patty	12/16/2014 12:42:51	David Narkewicz Access to TSO
	ESD Access	12170	Hopkins, Suzanne	12/16/2014 19:37:11	John Grandi- Close ACCESS
	ESD Access	12328	Pawitt, Aida	12/18/2014	new search.us contractor needs access to info...

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).

The screenshot shows a dashboard with a table titled "My Workload" and a pie chart titled "Incidents by Category-Current Month". The table has columns: Escalation, Lifecycle, Id, Raised By, Creation Date, Last Update, Summary, and Status. The pie chart shows categories: Desktop, DS-Mobile Device, DS-Software, SAS-Email-Webmail, and Service Desk.

Escalation	Lifecycle	Id	Raised By	Creation Date	Last Update	Summary	Status
Other		10771	Jarvis, Victoria	12/4/2014 12:44:05	12/18/2014 16:03:19	Changes to Existing: J-L Reynolds provisioned for OBIEE	Out with Customer
LANDesk		12003	Johnson, Sarah	12/16/2014 09:06:02	12/16/2014 12:53:56	Needs requestor rights for Landesk	Out with Customer
Incident		1388	Keeler, Charles	12/17/2014 05:43:24	12/17/2014 13:56:03	Can not log on to Tiny term	In Progress
LANDesk		12261	Johnson, Sarah	12/17/2014 13:03:31	12/18/2014 09:26:35	Allison needs to be able to enter Landesk tickets as part of her daily duties with helping Supervisors.	Out with Customer

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

Assigning Tickets

Only one analyst group or one analyst can be assigned at one time to a ticket. Below is information on how to assign yourself, re-assign if needed, and other actions that can be taken within the ticket.

Assign to Me for Open Tickets

The screenshot shows a form for "Request - 12047" with buttons for "Save and close", "Save", and "Cancel". Under the "Actions" section, the "Assign to Me" button is highlighted with a red arrow.

After you have clicked on the request open for your group, the ticket will open. Click "Assign to Me" action and the request will disappear from the "Open for My Group" area. It will now be viewed from the "My Workload" section of your Dashboard.

Note: After the ticket is 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.

Once you click "Assign to Me", the below Actions will appear. The ticket move to a status of "In Progress" for you to continue to work it or you can Save and close out of the ticket to work on it later as it now shows in your workload of the dashboard where you can click on it to open up and work the ticket. In your dashboard the ticket will be in the status of "Awaiting Manager Authorization" until you, as the account manager, choose one of the Actions listed.

The screenshot shows the "Request - 12047" form with the "Actions" menu expanded, showing options: Reassign, Add Note, Authorize, More Information Needed, and Reject.

The following action options appear: [Reassign](#), [Add Note](#), [Authorize](#), [More Information Needed](#), and [Reject](#).

The screenshot shows the "My Workload" dashboard with the ticket "ESD Access 12047" highlighted. The status is "Awaiting Manager Authorization".

Escalation	Lifecycle	Id	Raised By	Creation Date	Last Update	Summary	Status
Other		10771	Jarvis, Victoria	12/4/2014 12:44:05	12/18/2014 16:03:19	Changes to Existing: J-L Reynolds provisioned for OBIEE	Out with Customer
LANDesk		12003	Johnson, Sarah	12/16/2014 09:06:02	12/16/2014 12:53:56	Needs requestor rights for Landesk	Out with Customer
ESD Access		12047	Thomas, Tara	12/16/2014 10:25:39	2/24/2015 11:43:55	new hire	Awaiting Manager Authorization

Reassign

If the request needs to be re-assigned to another account manager within your workgroup, for whatever reason, click on "Reassign"; and assign appropriate name from the dropdown list. When you click Save and close, an email will be sent to that account manager informing them of the request.

DO NOT reassign to a different analyst group through this manual process. LANdesk has automatic workflow and permissions that take place when you complete your part of the work which will assign the next appropriate Analyst group to the ticket, as necessary.

Save and close Save Cancel

Assignment:

Group: ESD ACCESS Account Approver Analyst:

Notify Assignee: [Clear selection]

Notify Originator: Dalley, Pam

Hemenway, Lena

* Reason for Assignment:

Add Note

To interact within the request, use the "Add Note" action. This is used more for general informational purposes; it isn't necessary for the requestor to respond. This note will be added to the existing request and the requestor will receive an email informing them that their request has been updated. The note will be added under a "Notes" tab, which will appear at the bottom of the ticket. The dashboard status will not change.

Request - 12047

Save and close Save Cancel

Actions

Reassign

Add Note

Authorize

More Information Needed

Reject

History

New Note

Save and close Save Cancel

Note

Details:

Request - 12047

Save and close Save Cancel

Actions

EMPLOYEE INFORMATION - Press in B (information entered)

More Information Needed

Once the request has been submitted, the account manager may request more information. By selecting this action, the requestor will receive an email containing the ticket number and what information the account manager is requesting. This **STOPS THE SLA CLOCK** *see page 6, and changes the status to **OUT WITH CUSTOMER**. It also adds a note under the Notes tab. The requestor's reply will also appear under the Notes tab.

Request - 12047

Save and close Save Cancel

Actions

Reassign

Add Note

Authorize

More Information Needed

Reject

History

New More Information Needed

Save and close Save Cancel

More Information Required

Details:

Created: April 14, 2014 13:14:10 By Test Approver

Request - 12047

Save and close Save Cancel

Actions

EMPLOYEE INFORMATION - Press in B (information entered)

The request status will change to "Out with Customer".

Escalation	Lifecycle	Id	Raised By	Creation Date	Last Update	Summary	Status
	Other	10771	Jarvis, Victoria	12/4/2014 12:44:05	12/18/2014 16:03:19	Changes to Existing: J-L Reynolds provisioned for OBIEE	Out with Customer
	LANDesk	12003	Johnson, Sarah	12/16/2014 09:06:02	12/16/2014 12:53:56	Needs requestor rights for Landesk	Out with Customer
	ESD Access	12047	Thomas, Tara	12/16/2014 10:25:39	2/26/2015 09:52:16	new hire	Out with Customer

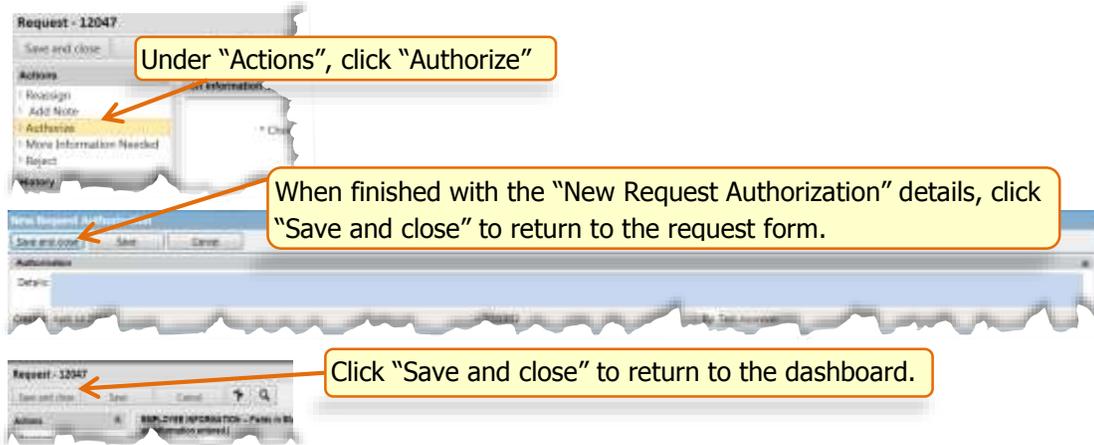
Once the customer/requestor replies to the account managers need for more information, it will be added to the "Notes" tab located at the bottom of the ticket. The ticket status automatically changes back to "In Progress", an email is sent to the Account Manager and the SLA Clock starts again. **THE ACCOUNT MANAGER HAS THE OPTION TO SELECT BACK FROM CUSTOMER AT ANY TIME**, if they do not want to wait for a response from the requestor, or have been waiting too long with no response.



The account manager may **click on "Back from Customer"** to proceed with the ticket before the customer/requestor responds to authorize or reject the 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".



Under "Actions", click "Authorize"

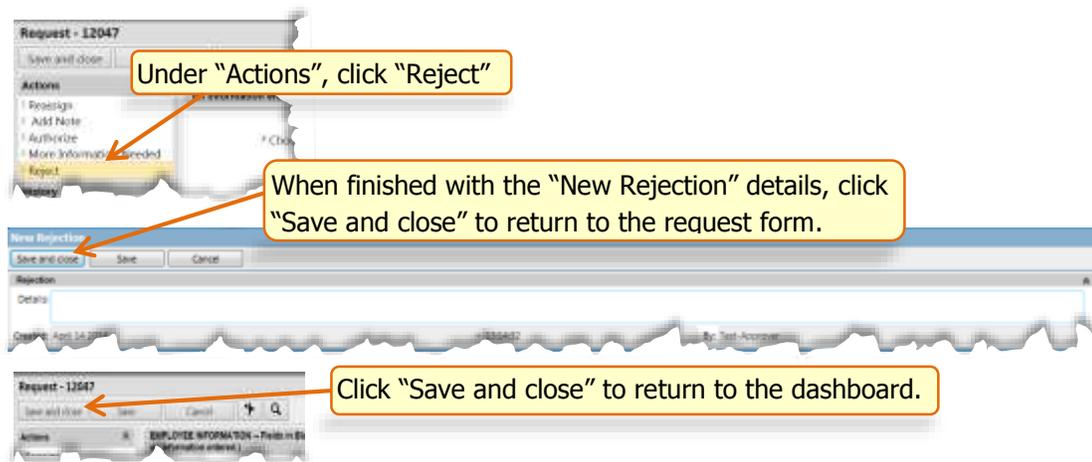
When finished with the "New Request Authorization" details, click "Save and close" to return to the request form.

Click "Save and close" to return to the dashboard.

The request will then automatically be assigned to the next appropriate analyst group. An email will be sent to the analyst group that the ticket is awaiting assignment to an analyst. The request will disappear from the account manager's dashboard.

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 request will disappear from the dashboard.

SLA (Service Level Agreements) within LANdesk

After a ticket has been submitted, there are DII Service Level Agreements (SLA) in place to set expectations which allow the requestors/customers to know when a request should be completed. All user account requests are defaulted to a medium priority that has an overall turn-around time of 7 business days. As an account manager, the approval process is part of the full workflow that is encompassed in the SLA "Clock". After you complete your part of the process, the ticket continues to move along in the process for completion. If your part of the workflow uses up most of the "Clock", this leaves little time for the rest of the work to be completed in the expected timeframe. Therefore, we ask that account manager approvers try to authorize or reject the request in a timely manner.

The ticket itself shows the end breach time for when the ticket should be completed.



SLA Dashboard Escalation View

SLA clock ticking for resolution:

- An escalation email is sent to approver/group assigned notifying Internal SLA timelines (at 50% of priority resolution time before internal SLA time) and color changes to blue.
- At 75% of Request fulfilled/resolution priority time, color changes to orange.
- At Breach, color changes to red, and an email notification goes out to approver/group assigned that the ticket has BREACHED. You have not met the SLA.

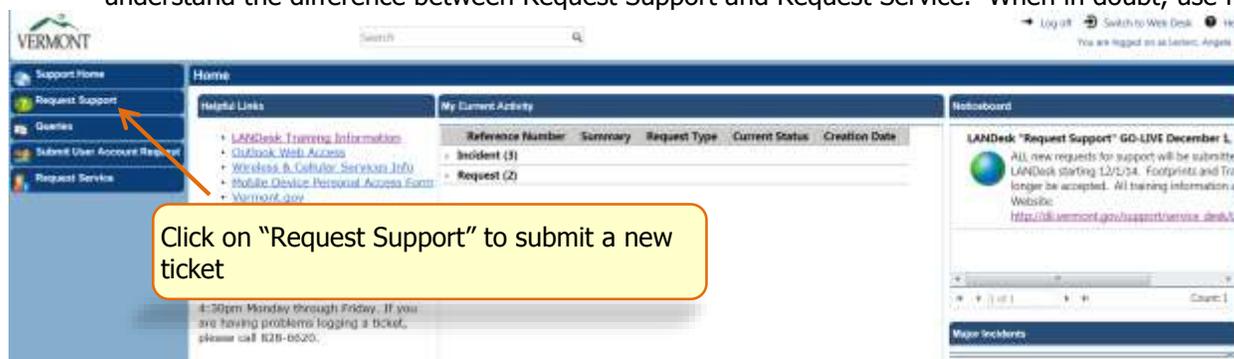
Escalation	Class	Lifecycle	Id	Raised By	Assignment Date	Title	Status
●	Request UAR Parent Request		239	Leclerc, Angela	7/10/2014 15:24:56	new Hire - Sally B. Smith - testing AFG form	Awaiting User Completion
●	Request UAR Parent Request		242	Leclerc, Angela	7/23/2014 07:53:04	test DVHA Accounts	Awaiting User Completion
●	Request ADExchange		355	Test-Requestor	9/25/2014 08:04:08	Change - P. Kerin - add account	In Progress
●	Request ADExchange		432	Test-Requestor	10/16/2014 08:52:20	Alice needs AD & Email	Out with Customer
●	Incident SOV Incident		34	Kerin, Phil	10/22/2014 13:59:22	Need a new distribution list	Resolved
●	Incident SOV Incident		37	Leclerc, Angela	10/22/2014 14:37:05	xxx	Resolved
●	Request SOV Service		465	Kerin, Phil	10/23/2014	attempt to triage to service request	In Progress

Self-Service Console View (Submit a Request)

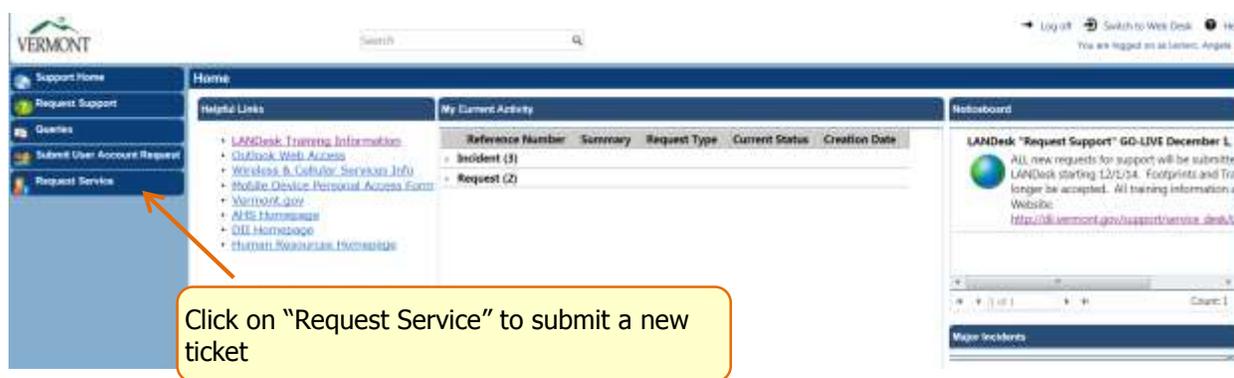
From Web Desk, click on Switch to Self Service to switch to the Self Service Dashboard.

Click on **"Request Support"** from the Self-Service Dashboard to submit new **break/fix** ticket (incident – FIX IT). There is a complete Request Support Guide on the training site that provides more in-depth information @ <http://dii.vermont.gov/sites/dii/files/PDF/Support/Request-Support-Guide.pdf>

NOTE: You, as Account Managers 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 email distribution lists, etc.)



The screen below will open. Because you are submitting as an analyst/approver, 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 Account Managers may not know.

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

The screenshot shows the 'New Incident' form with several sections: 'User Details', 'Incident Details', 'User's Asset Details', 'Current Assignment Details', and 'Ticket Information'. Fields are marked with an asterisk to indicate they are mandatory. Callouts provide the following instructions:

- All fields in blue mandatory (additional fields mandatory when requesting as an analyst – Category and group to assign)**
- Category:** Always choose Service Desk
- Suggested Group:** Always Choose Service Desk

When to choose "Save and close", "Save", or "Cancel" When Submitting a Ticket:
When finished with the form, you will have the following options.

The diagram shows three buttons: 'Save and close', 'Save', and 'Cancel'. Callouts explain their functions:

- Cancel** – Cancels the form and no information will be saved that may have been typed.
- Save** – Saves information and submits the form but will not exit the form so it will be in a "locked" status until you either 'save and close' or 'cancel' out of the saved ticket.
- Save and Close** – Submit the ticket by clicking Save and Close. This will close out the form after it submits the ticket showing that it was logged.

Submit User Account Request (UAR)

User account requests can only be submitted authorized User Account Requestors for their department. For more information, please see the UAR Guide: <http://dii.vermont.gov/sites/dii/files/PDF/Support/User-Account-Request-Guide.pdf>

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

Back to Web Desk Console

When you are done submitting a request, click on Switch to Web Desk to go back to web desk main dashboard.

The screenshot shows the 'User Account Requesting' dashboard. In the top right corner, there is a 'Switch to Web Desk' button highlighted with a yellow box and an arrow pointing to it. The dashboard includes sections for 'Request Here', 'Helpful Links', 'My Current Activity', 'Change Group', and 'Dashboard'.