User Account Requests Training (Requestors)

August, 2014

Presenter: Alice Cloud, IT Service Desk Specialist
Service Desk: 802-828-6620, Option 1

VERMONT

LANDESK

Refresher Training - August, 2014

AHS User Account Request

Overview

The State of Vermont uses various means for processing user account requests. The LANDesk request system is replacing several manual and electronic forms for these collections of systems and will automate the account request process.

- As an Authorized requestor, you will be logging into LANDesk and making requests for **newly hired employees, changes to existing employee information, or removing terminated employees** from computer accounts.

- This training will be focused on the basic steps that are needed to submit a request ticket.

- For more in-depth knowledge, you can use the User Account Requestor Guide at the LANDesk Training Information Site. http://dii.vermont.gov/DII_Divisions/Customer/Customer_Support/Landesk/training

Overview

LANDesk Training Information Site provides other materials that will be very helpful to review after attending this Webinar:

http://dii.vermont.gov/DII_Divisions/Customer/Customer_Support/Landesk/training

Requestor & Approver Training Guides

- User Account Requestor Guide (updated 7/16/14)
- User Account Request Approver Guide (updated 7/17/14)
- Frequently Asked Questions (updated 7/17/14)
- AHS User Account Requestor Points of Contact

UAR Quick Steps

- UAR Changes to Existing Quick Click List
- UAR New Hire Quick Click List
- UAR Termination Quick Click List

Webinars

- New Hire UAR Tutorial Link (approx. 20 min)
- Termination UAR Tutorial Link (approx. 20 min)
- Changes to Existing UAR Tutorial Link (approx. 20 min)
- User Account Requestors PowerPoint Slides
- User Account Requestors & Approvers PowerPoint Slides

Report Issues

- How to Report LanDesk Issues
- Send email to: SOV.LANDeskGoLiveIssues@state.vt.us

LANDesk Account Workflows

VERMONT

LANDESK

Generic Accounts for Most State Users

- Active Directory
- Email ★
- ACD Phone
- LANDesk Account

Accounts specific to AHS Users

- ACCESS*
- Medicaid Pharmacy Claims* ★
- Medicaid Analytics* ★
- MMIS * ★
- OnBase* ★
- AFG ★
- PEAKS ★
- Other (to be used for PAS/Tiny Term Accounts, ★ and others not configured in workflow that currently come through TrackIt)

***Requires business approval**

Accounts with a Blue Star are also dependent on Active Directory creation to be completed prior to those accounts being created.

Common Navigation & Tips
Email Interactions

Email Interactions with LANDesk:

<u>Email subject line</u>

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.

P.S.: If you've ever used Footprints, this is the same concept for emailing back and forth, in order to allow the emails to automatically update the system.

Common Navigation & Tips
Dashboard Request Statuses

Common Dashboard Status

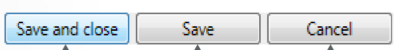
- **Acknowledged –** user has started a request and has chosen Save & Close (this is status before Awaiting User Completion – still need the user to go back in to finish and submit)
- **Awaiting User Completion** – the request form has been started but is not yet complete until an account request has been entered and submitted. (Nothing gets forwarded until "submit" is clicked by the requestor)
- **Open** – The "child" request has been created, and is waiting for an analyst to be assigned.
- **Awaiting Account Creation** – the "child" request has been assigned and is being worked by an analyst.
- **Awaiting Authorization** – the request requires prior approval and is waiting for an approving authority to approve.
- **Out with Customer** – the analyst has asked for more information; the request is waiting for a response or action from the requestor.
- **Awaiting Child Request** – the "parent" will have this status until all the "child" requests have been completed and closed.
  - Parent/Child Requests will be described below

Common Navigation & Tips

Save & Close, Save or Cancel

When to choose “Save and close”, “Save”, or “Cancel”

When finished with any form, the requestor will have the following options; **NOTE: none of these options will submit the request – they only save or cancel the form you are currently on.**



Cancel – Cancels the form and no information will be saved.

Save – Saves information on the form but will not exit the current form. New actions may appear.

Save and Close – Click Save and Close to save the information on the form and return to the main request.

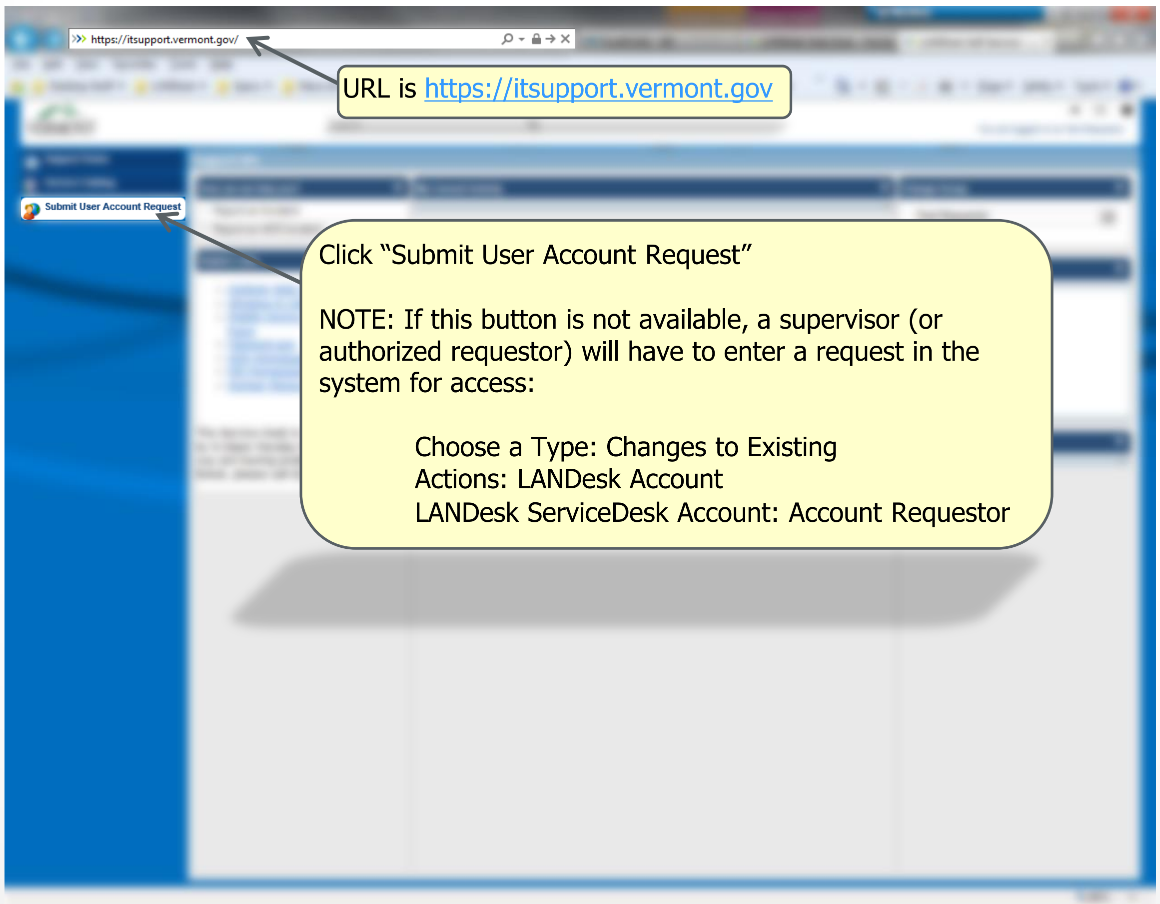
Submit a User Account Request

Log into LANDesk

- Go to https://itsupport.vermont.gov
    - **(Save this as a Favorite for Future Use!!)**
    - Your Windows login credentials will automatically pass through to LanDesk, and it should log you in automatically
- NOTE: To access LANDesk Self Service from a remote location, connect via VPN or Citrix first.
- You must be a member of the User Account Requestors group – otherwise you will not have the option to submit a request
    - Call the Service Desk if you do not see the User Account Requestors button. They may point you to your supervisor or a point person identified in your department to submit a request to be added to this User Account Request group. (802-828-6620, option 1)

Submit a User Account Request

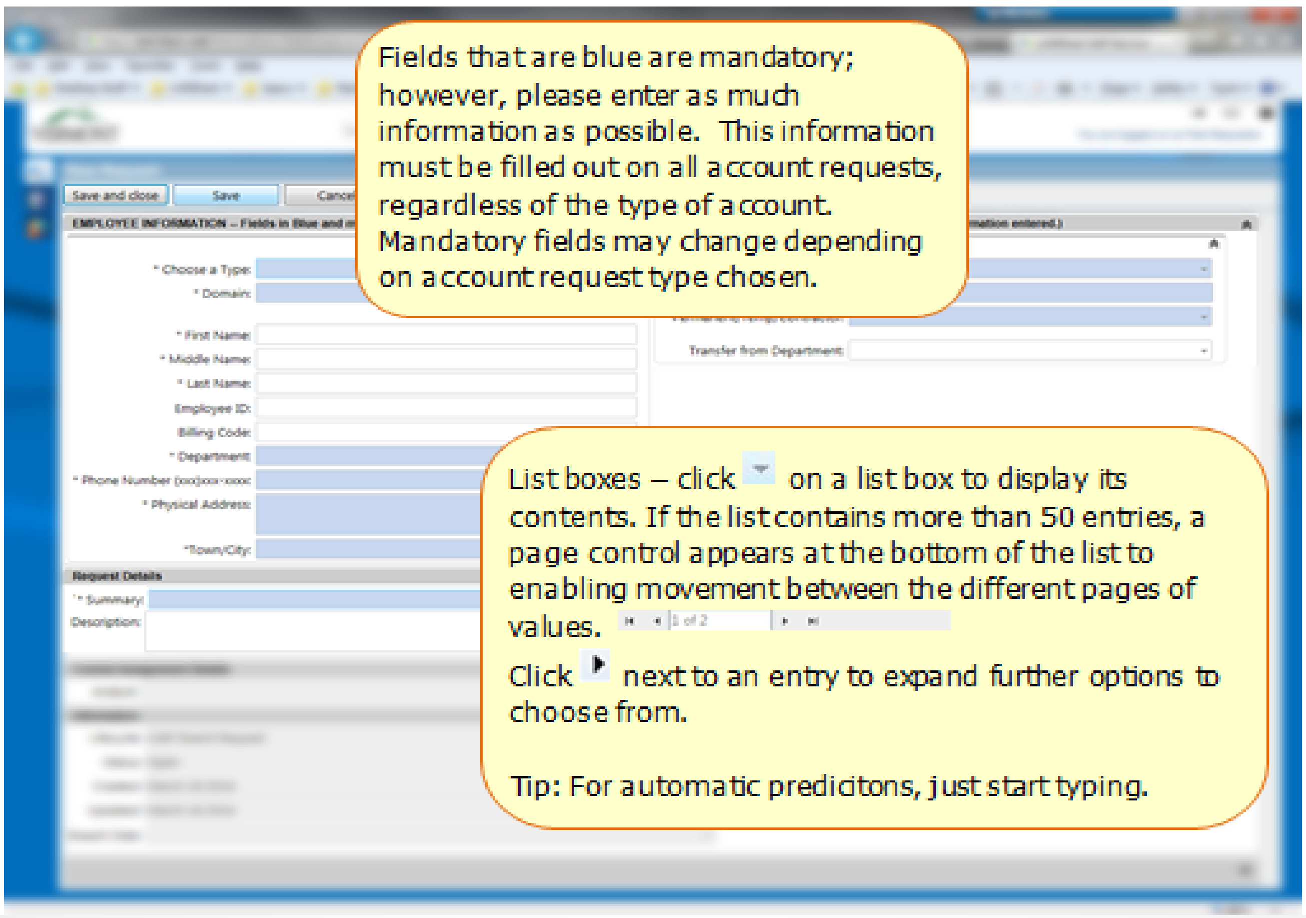
Submit User Account Request (New Hire/Termination/Changes to Existing)



VERMONT LANDESK

Submit a User Account Request

Some common navigation on the main form:



Submit a User Account Request

<u>Choosing a Type:</u>

- Changes to Existing - **who is in <u>same position</u>**
  - Current user requires change to add new account or change permissions to an existing account. (i.e. add OnBase account, if did not have it previously OR a change to Tiny Term headcount location).
  - Current user requires change in access/permission to an existing folder or account (i.e. for example: need to be added to an existing Active Directory folder or removed from a security group or email distribution list)

- New Hire
  - A new user who does not currently have an account with the State of Vermont.
  - An employee who has transferred from another State of Vermont department/agency.
  - A Current user moving within State Government (i.e. being hired into a different position by terminating from previous position)

    – A LANDesk UAR Request is done by Hiring Agency/Department who submits a UAR request to add new security groups and/or accounts specific to the new position.

- Termination
  - A user who has terminated from or been terminated from their State of Vermont position.
  - An employee transferring to another State of Vermont department/agency.
  - A <u>Current user</u> moving within State Government (i.e. terminating from a position and being hired into a different position)

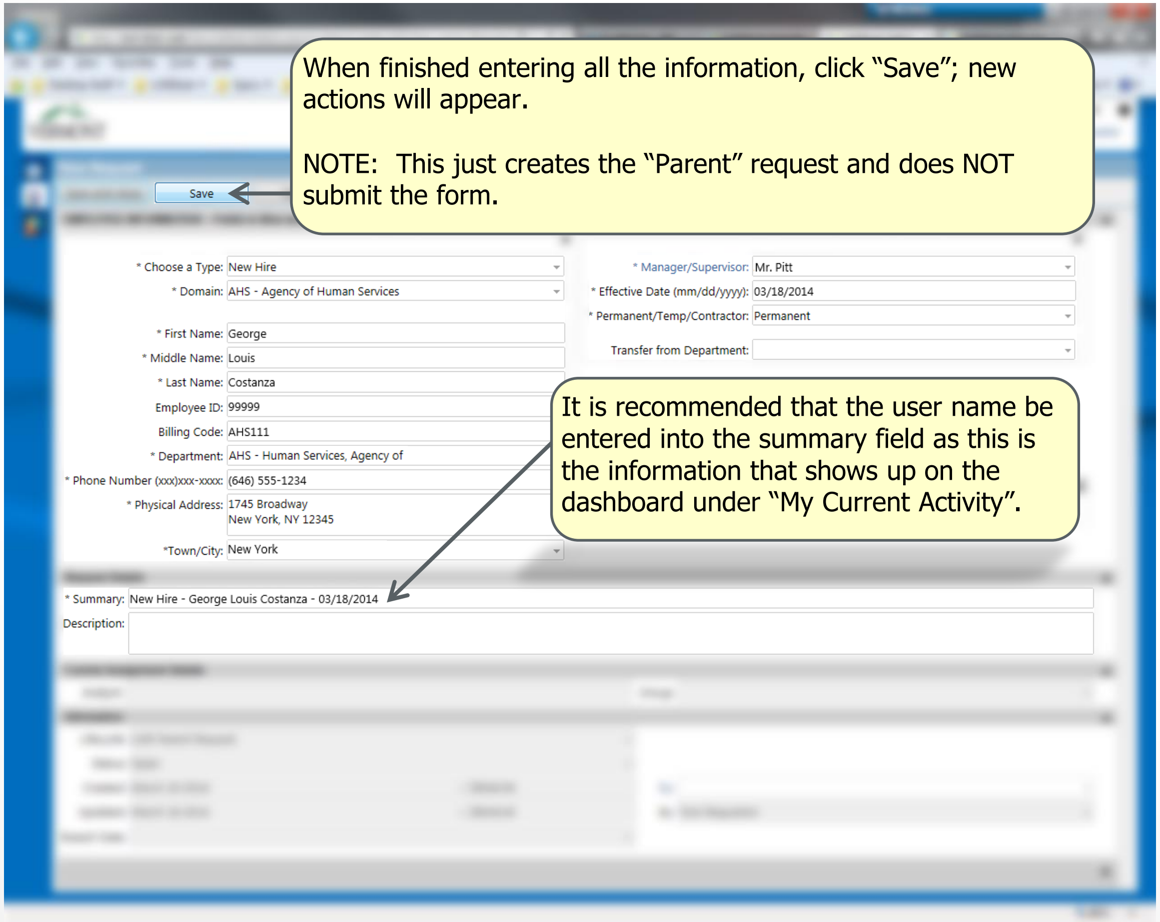
    – A LANDesk UAR Request / Termination is done by the Departing Agency/Department to remove all current security groups and other account accesses that are no longer needed. This is also where it would be noted that authorization is given for user to have access to existing mailbox and files.

<u>CONTINUE TO USE TRACKIT (AHS HELPDESK FORM) FOR THE FOLLOWING USE CASES:</u>

- You need new Active Directory group or folder created, and give existing users permission to it
- You need to have a new email distribution list created, and add users to the list

Submit a User Account Request

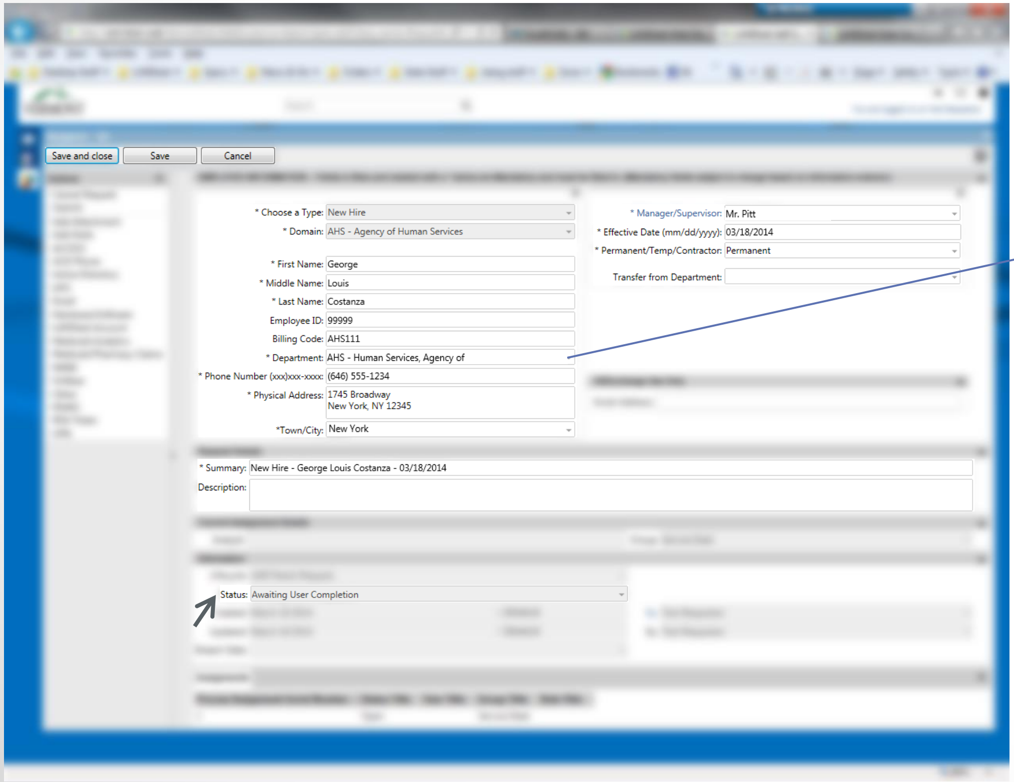
Filling out the main employee information form

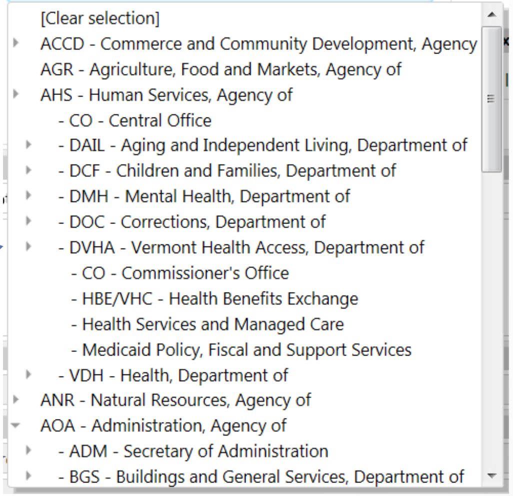


Submit a User Account Request

Dropdown fields:

You must expand your Department selection (the arrow) to indicate which department/office you work for. Otherwise it may hold up your request.





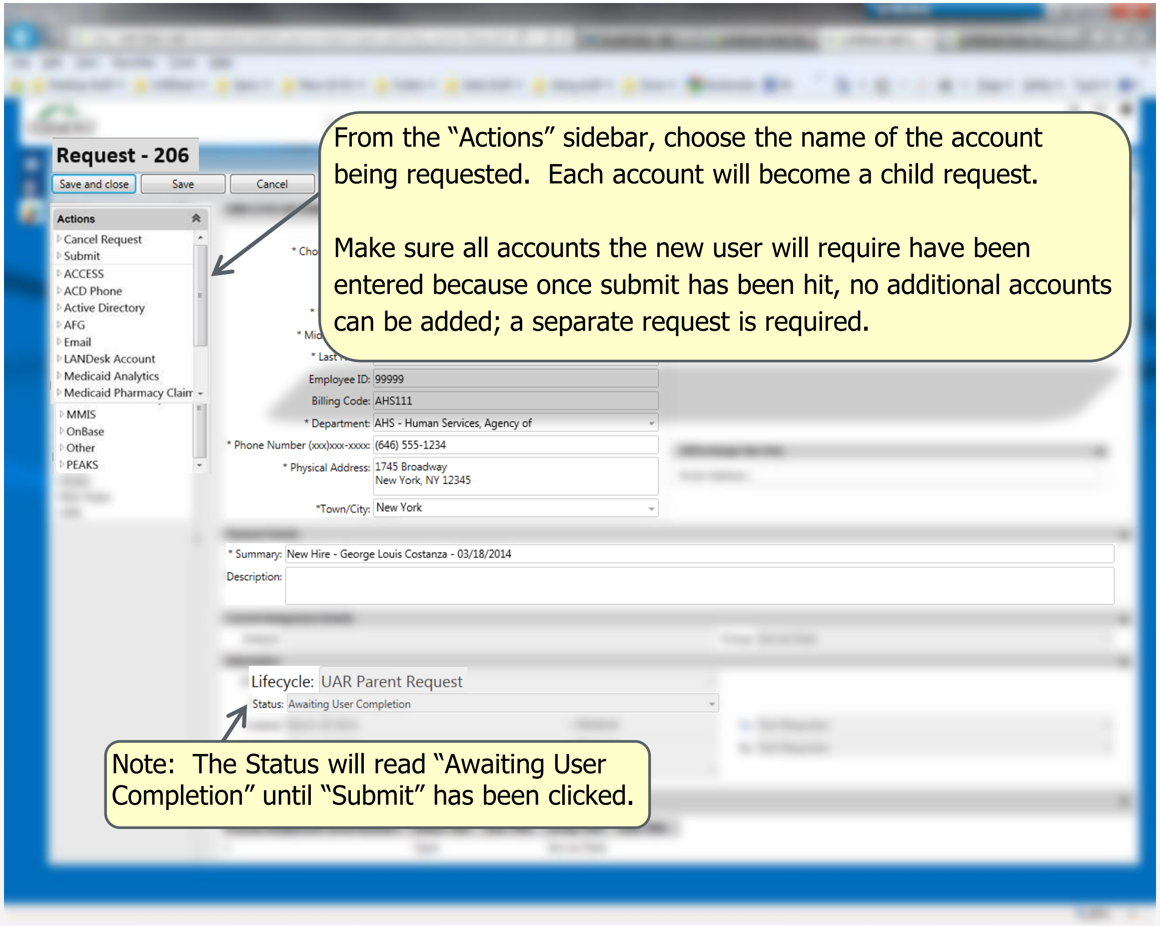
Click next to an entry to expand further options to choose from.
Tip: For automatic predictions, just start typing.

Submit a User Account Request

Walk through filling out the main employee information form for a New Hire.

Submit a User Account Request

Creating an account request (child)

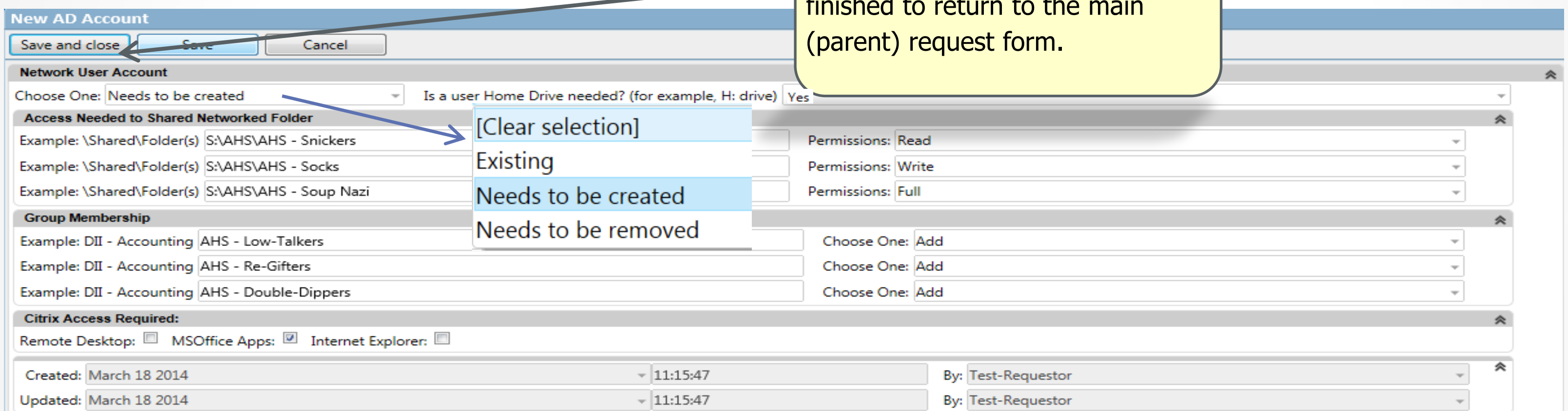


Submit a User Account Request

Account request Examples

Active Directory Example

Click "Save and close" when finished to return to the main (parent) request form.



******This should be chosen when you have a New Hire and/or Termination******

- This is the login the user needs to login to their PC. This must also be chosen any time you have a termination.

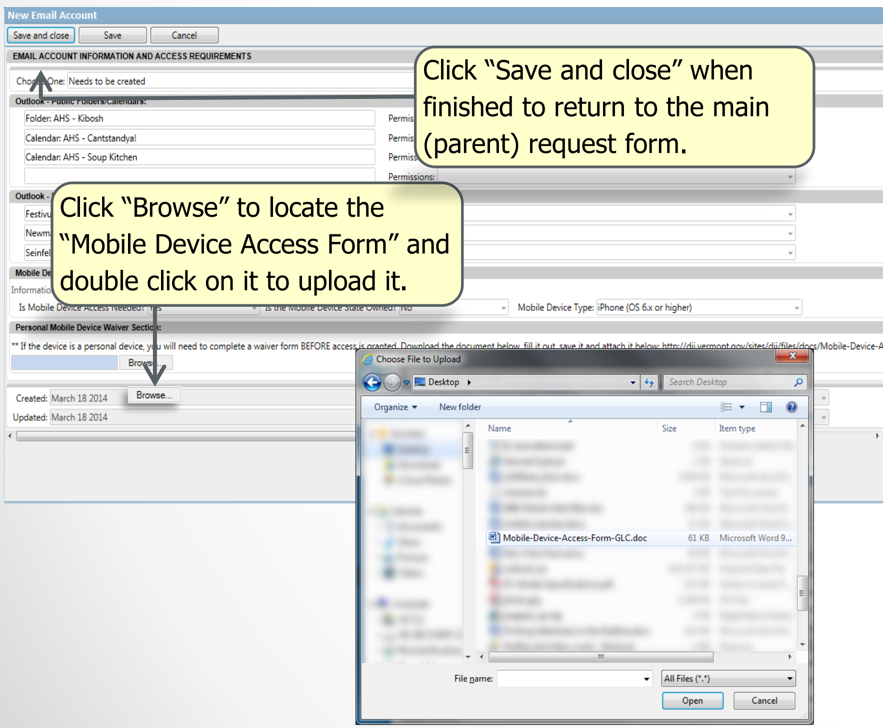
NOTE: if terminating an account, make a note to remove all access.

Submit a User Account Request

VERMONT
LANDESK

Account request Examples

Email Example

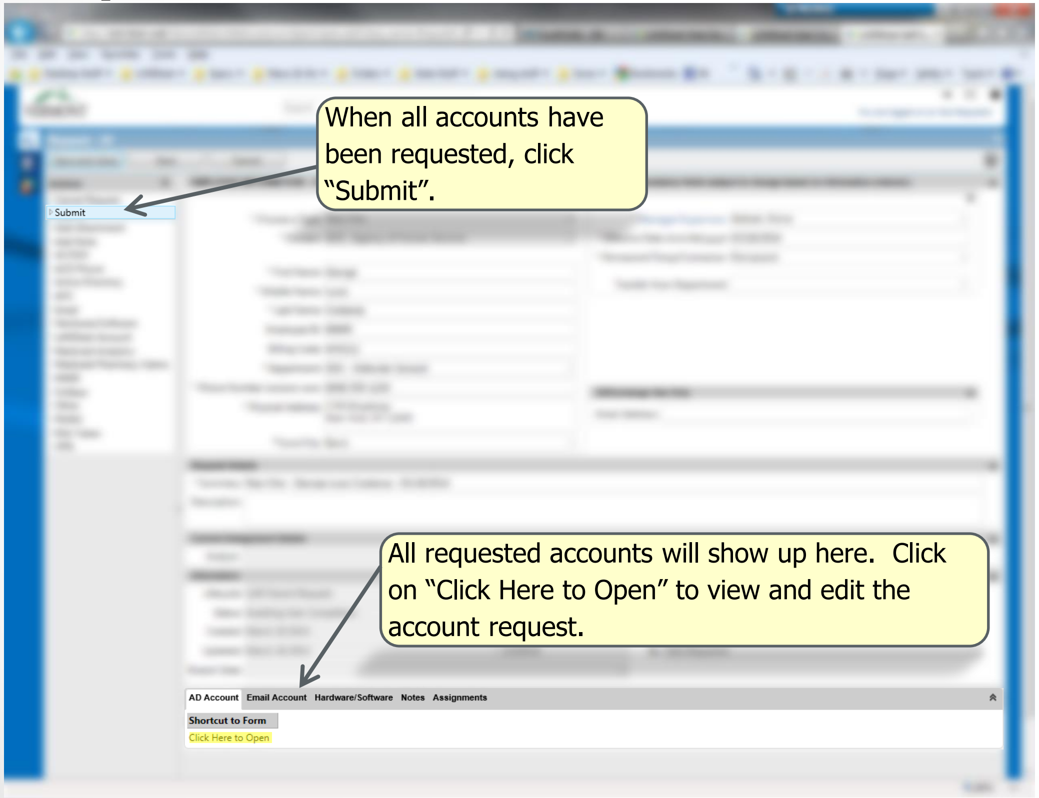


NOTE: In the "Personal Mobile Device Waiver Section", if the new account will be using their personal mobile device, the "State of Vermont Personal Mobile Device Access Form" will need to be filled out and attached. The form can be obtained at http://dii.vermont.gov/sites/dii/files/docs/Mobile-Device-Access-Form.doc. When the form is complete, save it to a shared drive or the local computer, and upload it.

VERMONT LANDESK

Submit a User Account Request

Submit – your request will not be sent to an analyst until you click on Submit



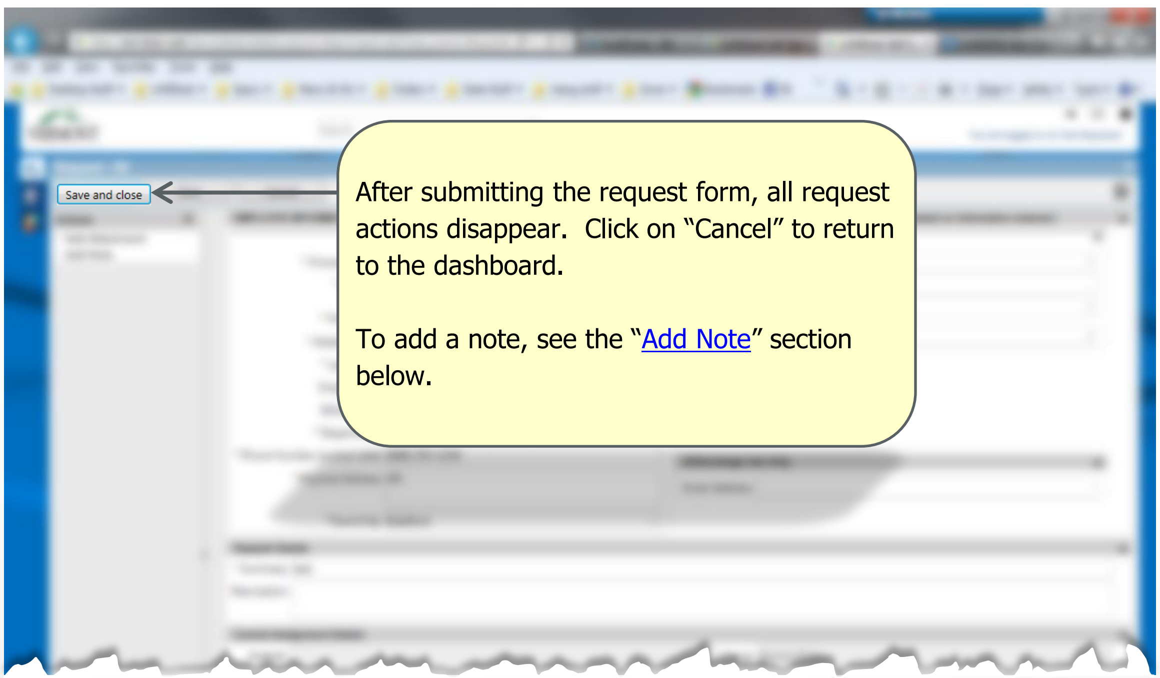
Click <u>Cancel</u> to Close Out of Screen

VERMONT LANDESK

Submit a User Account Request

After you click Submit – The Account Actions go away. When an analyst is assigned to the request, new actions become available. See "Add Note"

If you are done, click on Save & Close or Cancel to Return to the Dashboard.



Submit a User Account Request

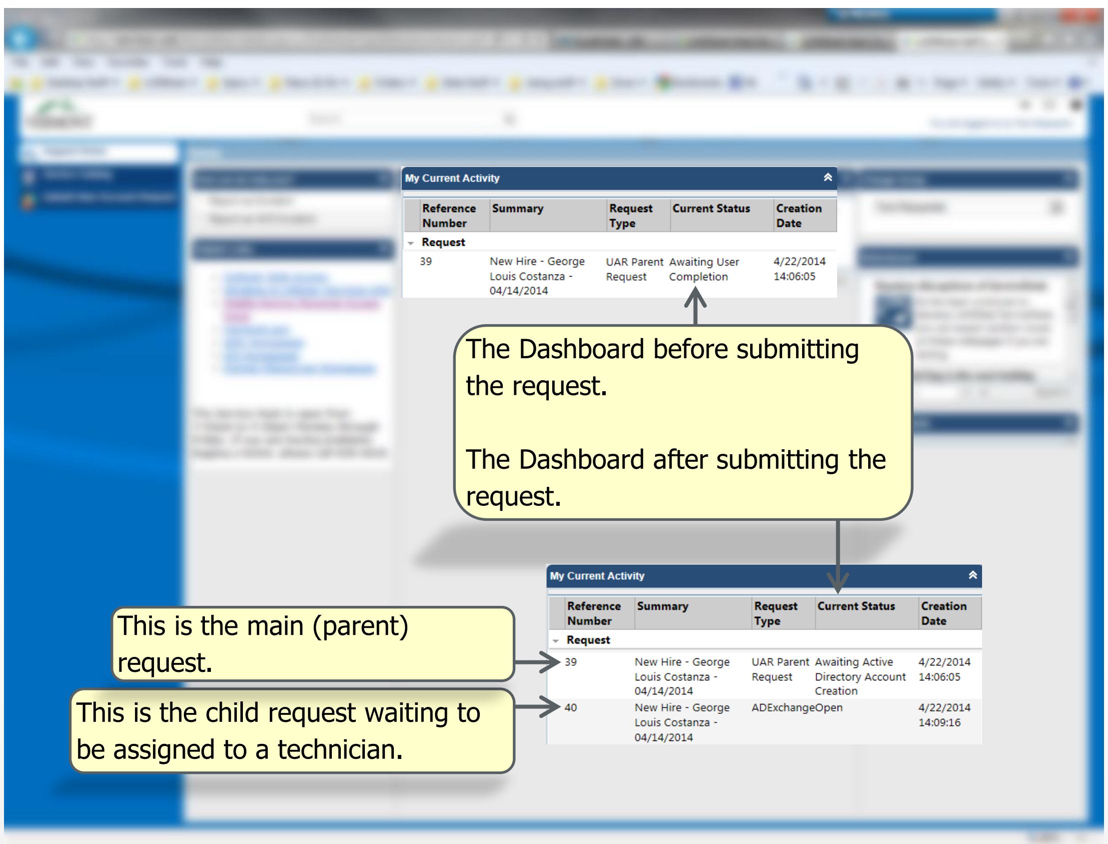
Walk through filling out the account actions from the main form filled out earlier and click on Submit.

VERMONT LANDESK

Self-Service Dashboard

Once the request has been assigned to an analyst, the requestor will receive an email referencing the request number.

Here is a screenshot of your self-service dashboard:



Interaction with LANDesk Requests

Interaction via email:

- **NOTE: NEVER PUT ACCOUNT CREDENTIALS IN A LANDESK REQUEST OR EMAIL.**
- Once the request has been submitted, LANDesk will generate emails related to the following: User Account Request (UAR) number. The email may:
  - requesting more information,
  - inform the requestor that a note has been added to the request
  - the account has been created
  - the request has been approved or rejected, etc.
- The requestor can reply to the email at any time and it will be added to the “notes” section of the request.

Interaction with LANDesk Requests

More Information Needed:

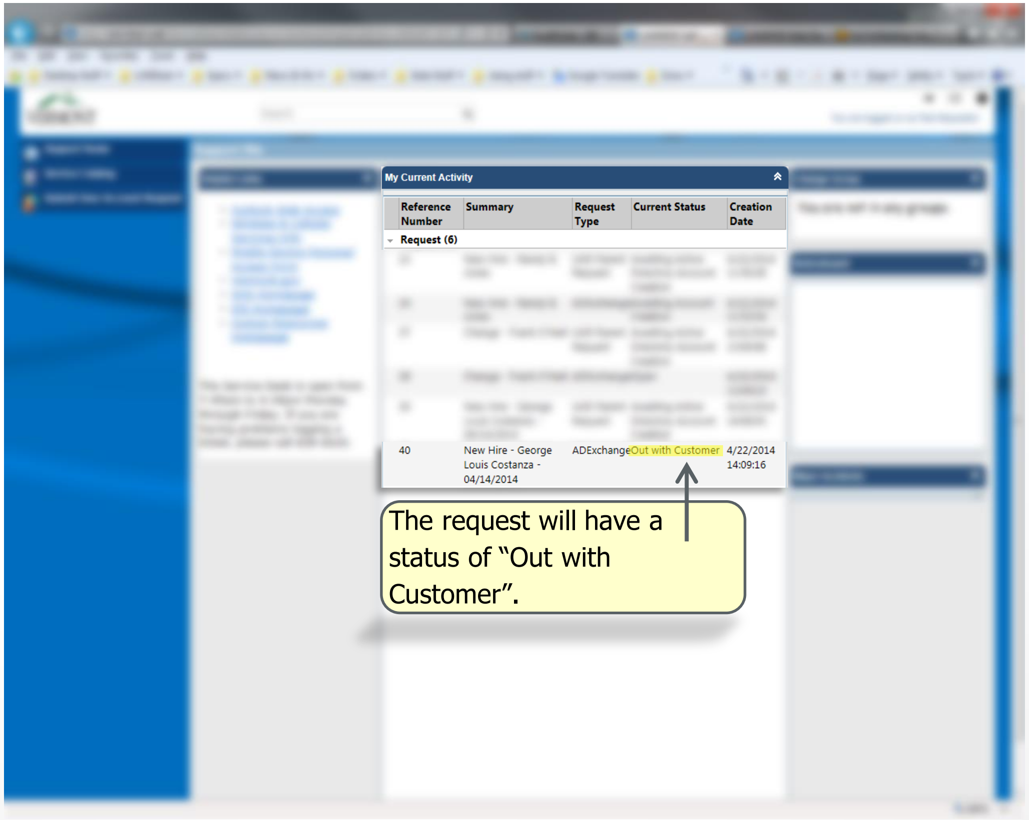
Once the ticket has been submitted, the requestor may get an email requesting more information. The email will contain the User Account Request (UAR) number and what information is needed. To reply, see "Interaction through email" and "Interaction from within the Request Form" sections below.

- **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.**

Interaction with LANDesk Requests

More Information Needed:

If an analyst is requesting more information, the status will also change in the Dashboard to "Out with Customer". This means they are awaiting an answer from you before proceeding.



Interaction with LANDesk Requests

Interaction via email:

- **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.**

All e-mail correspondence is stored in the "Notes" tab of the request form.

From the "Dashboard", click on the request to see the "Notes" tab at the bottom of the request form.

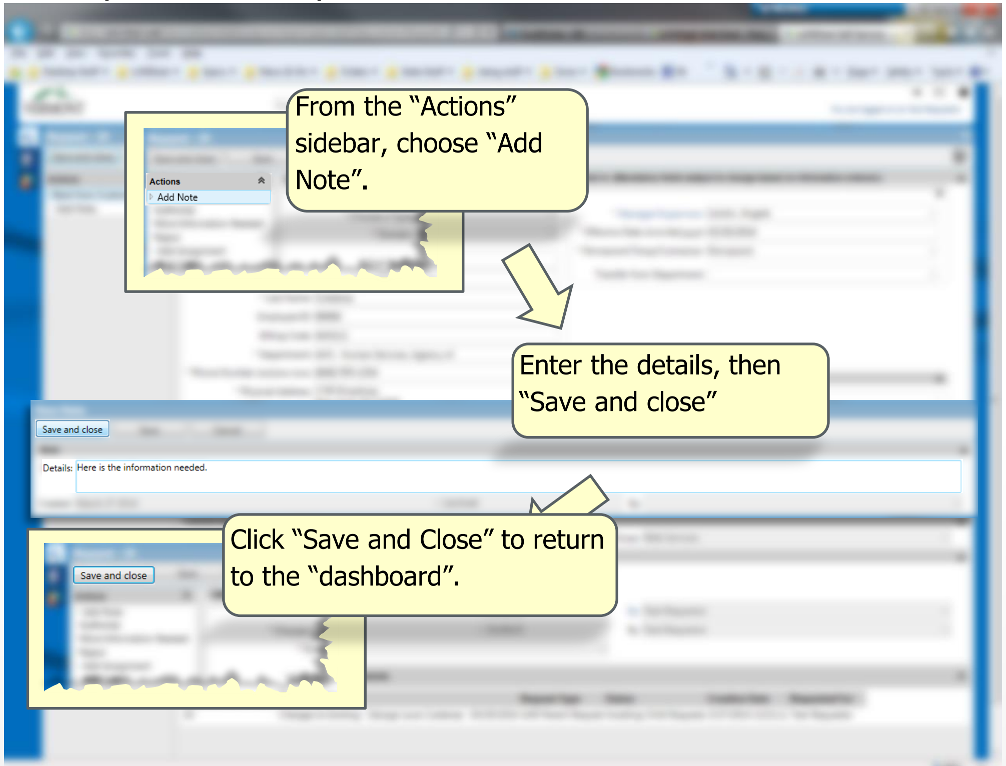
Notes

Number	Text	By
1	Is George transferring from another department?	Test Approver
2	No, George is a new user... Rhonda Boudreault State of Vermont - DII 802-828-5856 -----Original Message----- From: DII - Landesk Request Sent: Monday, March 24, 2014 10:21 AM To: Boudreault, Rhonda Subject: UAR Request# 28: More Information Needed regarding a Medicaid Analytics New Hire Account Request. Is George transferring from another department?	Test-Requestor
3	Will George need additional access?	Test Approver

Interaction with LANDesk Requests

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.



Submit a User Account Request

Walk through the dashboard and adding a note from request submitted earlier.

VERMONT LANDESK

Request Closure Notifications

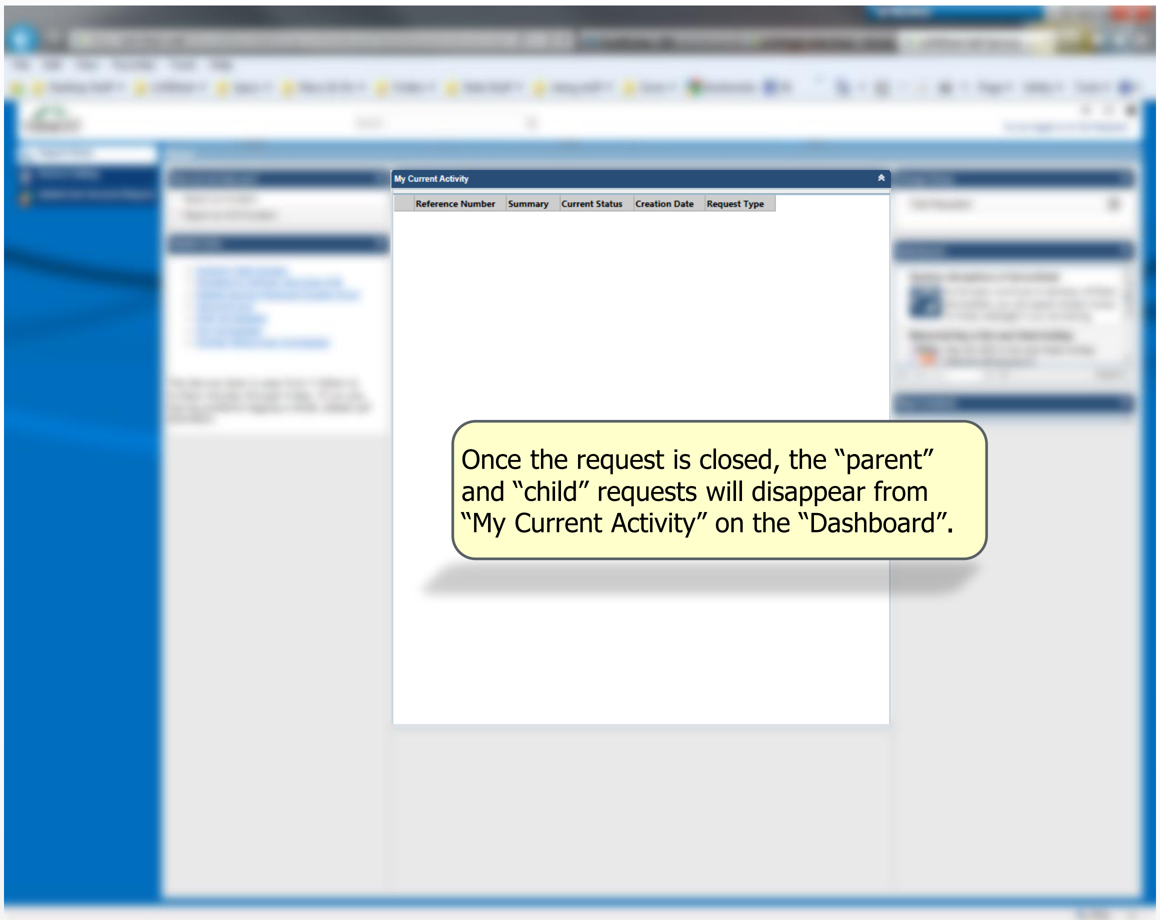
Request Closure

- As each account is created, the requestor will receive an email stating that the account has been created and that portion of the request (child request) has been closed. The email will contain the User Account Request (UAR) number and details of the account creation.

- When all accounts have been created, the requestor will receive a final email stating all tasks have been completed and the request has been closed. The email will contain the main (parent) request number.

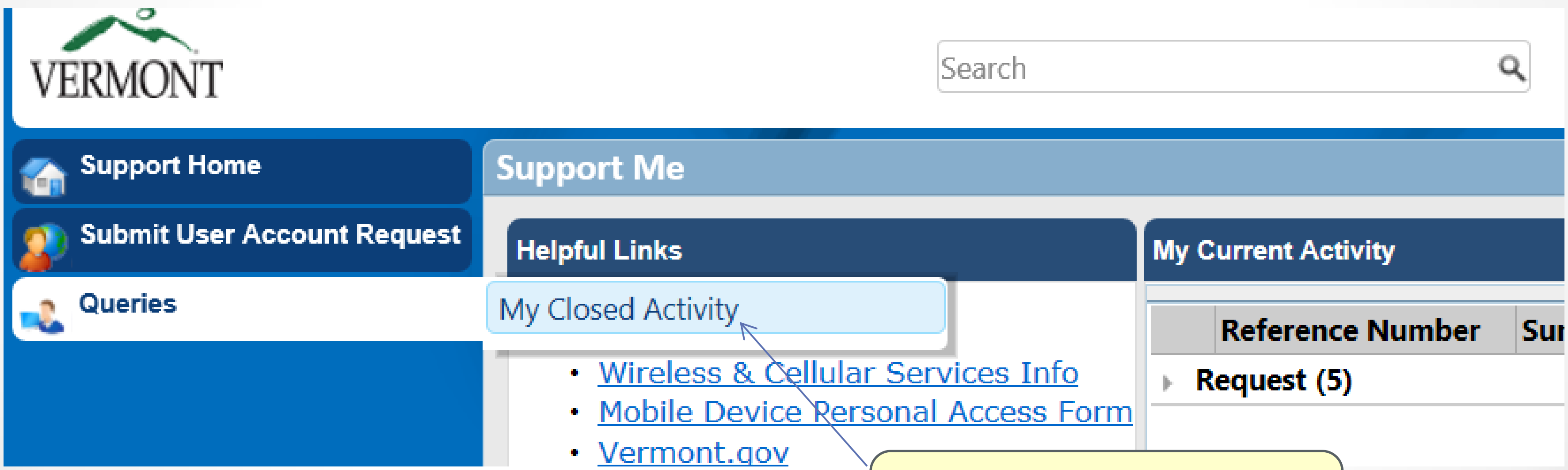
Request Closure Notifications

Request Closure



Request Closure Notifications

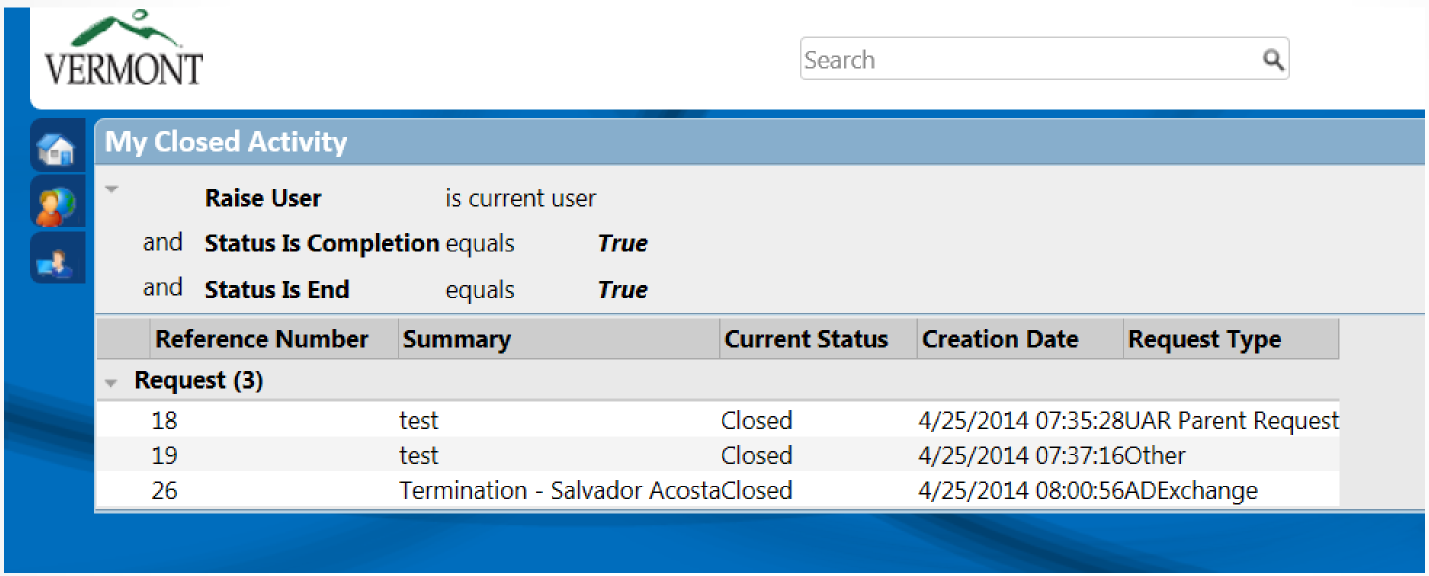
Request Closure Queries



You can view closed requests by Clicking on Queries on the left, and then "My Closed Activity"

Request Closure Notifications

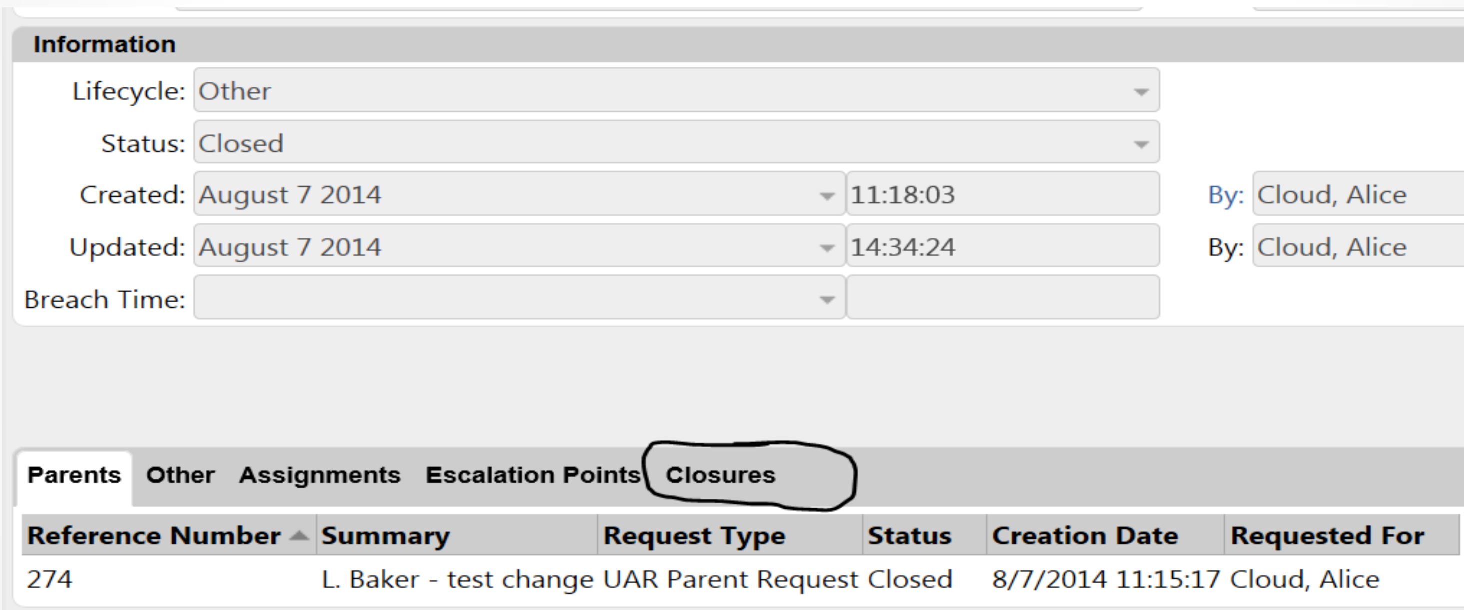
Request Closure Queries

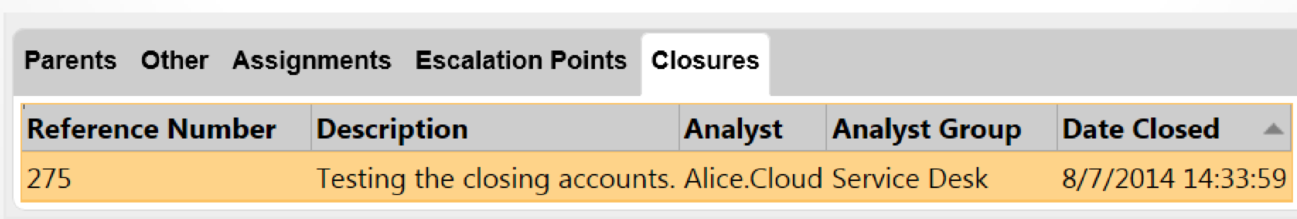


List of closed Requests

Request Closure Notifications

Request Closure Queries





Submit a User Account Request

Walk through the dashboard query for closed requests.

Information – Questions/Report Issues

DII Service Desk:

- Call 802-828-6620, option 1, or toll free 1-855-828-6620, option 1
- Email: : SOV.LANDeskGoLiveIssues@state.vt.us
- Training Documents: http://dii.vermont.gov/DII_Divisions/Customer/Customer_Support/Landesk/training

What to Report in Email

- User name and contact information
- Reference number of ticket
- What time was the error
- Description of what you were working on, trying to do
- What was the error
- Do you have a screenshot (see below for how to take a screenshot)
- Is this the only time you have had this problem or is it a reoccurrence

Screenshots are Very Important

- The Snipping Tool is easy to use and can provide a picture of the error you received.

Recommendation: Pin the Snipping Tool to your Start Menu. It is easy to use and to Pin.