VITA Customer Care Center
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Managing Calls – Quick Reference Guide

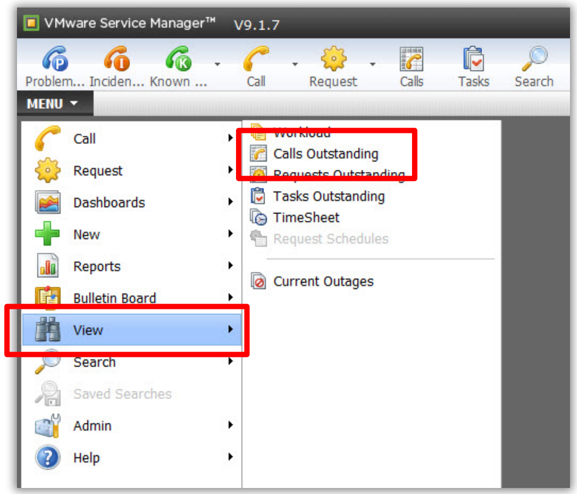
IT INFRASTRUCTURE PARTNERSHIP

Logging into Service Desk

To log into VSM as an officer, navigate to the portal using Internet Explorer 7 or 8.

Calls Outstanding

Click the **View** button to access the **Calls Outstanding** Screen.



The **Calls Outstanding** window is divided into view filters on the left, and a list of the filtered calls on the right, called the browse table. To monitor calls that you have logged and forwarded, but have not been picked up by a technician, make sure the "Forward Internally" checkbox is selected. To see calls that you have deferred make sure the "Your Calls" checkbox is selected.

Actioning an Incident

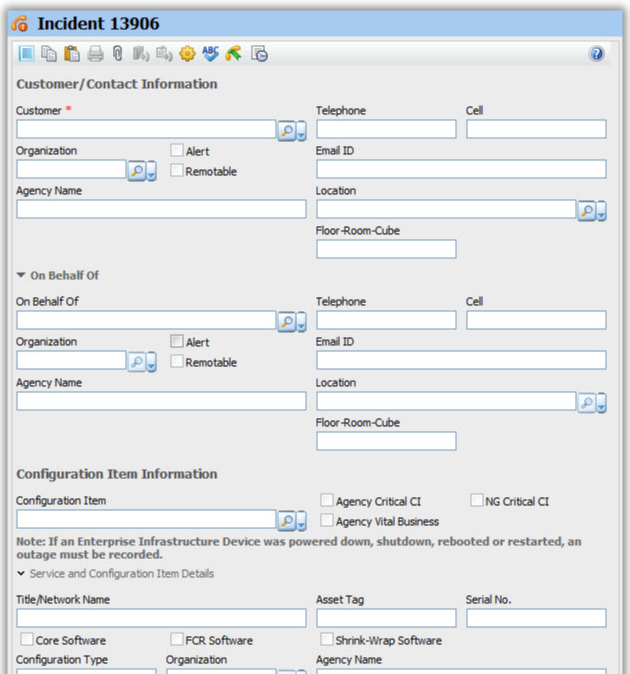
1. From the **Calls Outstanding** window, under filters, make sure the "Your Calls" checkbox is selected.

2. Double-click on the call you wish to action. The call will open on the screen ready for you to action.

Note – The icon on the tool bar is the action button which will give you ownership of the call. Double clicking on the call or using the eyeglass icon will open the incident in review mode.

Logging a Call

1. Click the **Call** button. The **Incident Screen** will appear as follows:



2. Link **Customer** to call by entering their name and clicking on the **?** button. Then double-click on the correct name if displayed in the list of Customer**, %** is the system wildcard. Refer to **Service Window** topic below to see how to avoid duplicate calls for this Customer.

3. In the **Description** field, type the details of the call.

4. Enter the **Service** related to the call; the fields associated with the service will auto- fill (i.e. Service type).

5. Enter the **Config Item** (asset) related to the call; the fields associated to this CI will auto-fill (i.e. CI type).

6. In the **Type** field, click the **?** button to choose the Incident type category that best fits the call. Selection can be made at any level by double clicking.

7. To determine the call's priority, select from the drop down list for **Urgency** and **Impact**. Priority will auto-fill based on these fields.

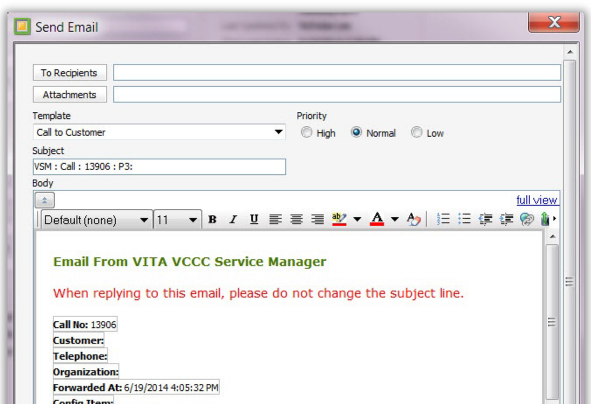
8. Enter troubleshooting results and /or information in the "**Actions and Solutions**" field.

Assigning an Incident to a Group / Analyst

1. Click the ***Internal*** button at the bottom of the **Incident Details** window.
2. Make sure the Group radio button is selected in the Forward To list.
3. Select the appropriate Group from the list.
4. Click OK.
Note – Ownership of the call transfers to the forwarded Group when someone in that Group "takes action" on the call. (To forward to an individual, select the "Officers" or "Groups by Officers" radio button and select an officer/analyst from their group.)

Email Alerts

When incidents are assigned to a group, emails are generated to each member of the group making them aware that an incident has been assigned. There will also be a URL, in the e-mail, enabling an analyst/technician to review or action the incident.



(Self Assignment) Deferring a Call

If you want to save a call and finish it later instead of forwarding it to a Group, then you need to defer the call.

1. Click the ***Defer*** button at the bottom of the **Incident Details** window.
2. The **Defer Call** window appears. Select a Defer Title from the list.
3. Click OK.
4. To retrieve the call later, follow instructions, under "Outstanding Calls" topic.

Saving the call and cancelling out of the window will effect the same outcome; the call will show up under the "Your Calls" section of the queue, and you will retain ownership of the call.

Closing a Call

1. Click the ***Close*** button at the bottom of the **Incident Details** window. The **Close Call** window will appear.
2. Be sure the correct (Incident) **Type** is selected.
3. Select a reason for the call from the reason drop down list.
4. Type a brief One Liner and a Description.
5. Click **OK**.

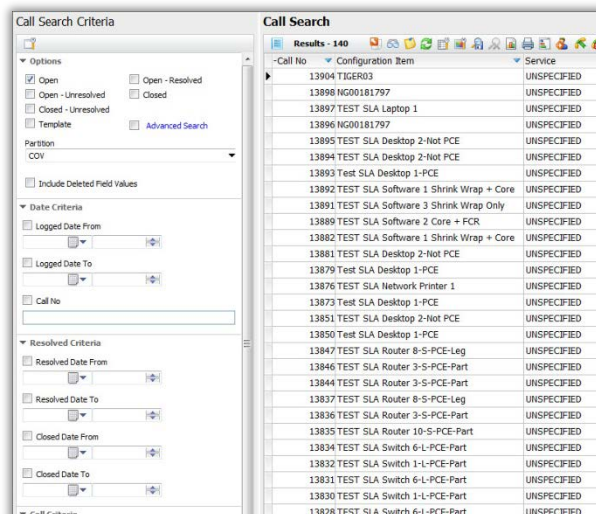
Search

Search is divided into two windows. The first window allows you to specify the search criteria, the second displays the results of the search.

Once you enter the criteria for your search, click the **Search** button to perform the search.

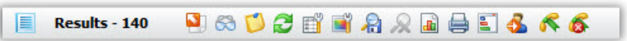
Example: 'smi' will return a result of all records starting with 'smi' such as 'smith' and 'smitty'. The wild card operator is the percentage symbol, %.

Multiple call numbers can be searched on when entering them in the **Call** field, by separating the call numbers by a comma.



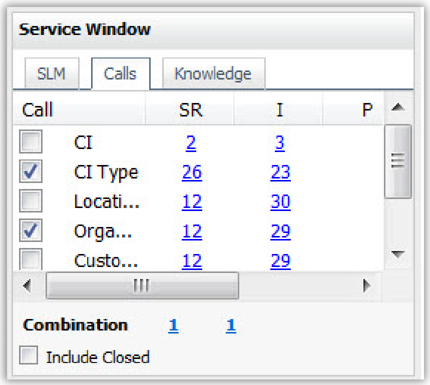
Search (cont'd)

1. Click the ***Search*** button and select Calls to launch the **Search** window.
2. In the Main Search section, enter the search criteria for the call(s) you wish to view.
3. After you enter the desired criteria, click **Search** to execute the search. The results will be displayed in a table view on the right side of the screen. Calls can be reviewed and/or actioned as in Calls Outstanding
4. You can change which columns are displayed by clicking on the columns icon above the search results.



The Service Window Pane - Calls

The **Service Window** can be used to determine if a Customer has outstanding Incidents, also assists with identifying trends and facilitates the linking of Incidents and Problems. The Service Window appears in the lower left of the **Incident Logging** window.



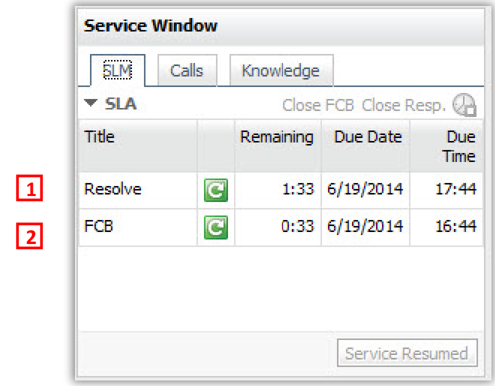
Using the Calls Service Pane

1. After you populate the Customer fields, check the **Service Window** to see if the word "Customer" is shown (see sample screen to the left). If not, that means there are no other open calls for that Customer.
2. If the Customer has other open calls in the system then the number within the incident column next to the word "**Customer**" indicates how many.
3. Double-click on the on the number in the incident column. The system will display a Call Search window listing the other calls open for that Customer.
4. Review the list of calls from step 3 to determine if the Customer has already logged a call about the current issue.
5. If you locate a call about the current issue, then click on the take action button to update it with new information and go to step 9 of Logging a New Call.
6. After you review the related calls for the Customer, click the black **X** button in the upper right hand corner of the Call Search screen to return to the **Incident Details** screen.

If the new call is a duplicate of an existing call then cancel the new call by clicking on the Cancel button at the bottom of the Incident Details screen. You will be prompted to confirm that you want to cancel the call. Click Yes .

The Service Window Pane - SLM

Service Level Management Pane



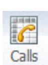
The Service Level Agreement and Operational Level Agreement escalation and completion times are detailed for both Contact and Resolution events. The time remaining and due date for each action are detailed.
After you populate the Service, Type, Impact and Urgency fields, save the record and check the Service Pane to see the SLA and OLA agreements events and target times.

Quick Solutions

Quick Solutions are predefined Descriptions and Actions that speed up the logging of common calls, for example, a password change. After selecting a Problem Type, the Quick Solution button will change from blue to orange if one exists.

Once a **Quick Solution** has been selected, the call may close automatically or may remain open in case there is additional information to be added. If the **Quick Solution** name has an exclamation mark next to it, then the call will close automatically and a new blank **Incident Details** window will open.

To use Quick Solutions

1. Click the 

button.
2. Enter the Customer as in “Logging a New Call” topic above.
3. Click **Quick Solutions** in the Explorer Window under the Resolution heading. The Quick Solutions window will appear.
4. Double-click on the appropriate Quick Solution.