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Magic SDE Self-Service

- **Agency Security Administrators (ASA)**
- **Workflow Administrators (WFA)**
- **Employee Data Administrators (EDA)**
- **Credit Card Administrators (CCA)**
- **User Support Liaisons (USL) at Type A Agencies**
- **Super Users (SU) at Type A Agencies**
- **Bulkload Liaisons (BLL)** *(added - September 2012)*

Magic Self-Service: Progress Report

- We rolled out Magic to agency self-service users in February 2012
  - Over 1,200 agency users registered
  - Over 10,000 incidents logged
- Plenty of room for improvement
  - Only 32% of the agency users have logged an incident
- We appreciate your patience as we continue to refine the system to best suit your needs
- Please share your suggestions for improvement with us

Overview

- What is Magic SDE (Service Desk Express)?
- The Lifecycle of a Help Desk Incident
- Your Role & Responsibilities
- Logging in to Magic Self-Service
- The Magic Self-Service Window
- Tracking the Status of Your, or Your Agency's, Incidents
- Creating Incidents using a "Quick Ticket"
- Your Login Credentials

What is Magic SDE?

- SDE = Service Desk Express (formerly “Magic”)
- Incident tracking software, commercially available
- Used by Help Desks in small to medium-size organizations
- Shared with the Office of the State Comptroller’s CIO Office

Technical Requirements

- Magic Self-Service is a web application:
  - Accessed via your web browser
  - No special software to install
- You should use **Internet Explorer**
  - Users have reported incompatibility with other browsers (Firefox, Chrome, etc.)

Internet Explorer: Details

- For greatest compatibility, we recommend you use **Internet Explorer (IE) version 7.**
  - This is the version most often found with Windows XP
- We understand that many agencies have upgraded and standardized on Windows 7
  - Default browser for Windows 7 is IE version 9
  - Your IT staff have the ability to load IE version 8
- IE versions 8 and 9 are **not** certified compatible with the version of SDE Magic we are running.

Internet Explorer: Details

- Some users report no problems with Internet Explorer v8
- Other users encounter problems
  - Inability to attach documents
  - No response when clicking some action buttons
- For best results, work with your IT staff to downgrade to IE v7
- If this is not possible, and you encounter problems, please contact the SFS Help Desk
  - We have a document we can send you with recommended browser settings to minimize your risk of compatibility problems
- Please note, we can only do so much if you are using an incompatible browser
  - Your local IT staff may have to troubleshoot

The Lifecycle of a Help Desk Incident

- Some incidents start with you, using Magic Self-Service
- Or, an incident may start at the SFS Help Desk, from an email or phone call
- Sometimes the Help Desk has the answer or solution
  - “First Call Resolution”
- Sometimes the Help Desk sends it to a Tier 2 support team for higher-level work (analysis, solution)

The Incident Lifecycle, *continued*

- Usually the Tier 2 team will resolve the incident
- Sometimes a resolution requires a Tier 3 or even Tier 4 team's input
- The resolving team communicates the resolution back to the client
  - "Resolved" is the status the client really cares about
- The incident returns to the person who created it, to be Closed
  - This is an administrative function

Role of an SFS Self-Service Magic User

- Be a Subject Matter Expert on SFS PeopleSoft topics related to your role(s)
- Answer questions from your user population
- Be familiar with all the relevant SFS resources (UPK training modules, Job Aids, etc.)
- Refer your users to the appropriate resources
- Strive for your own “First call resolution”
  - In this case, you don’t need to create an incident
  - This is the best case scenario – the least amount of work for everyone involved

Role of Self-Service Users, *continued*

- Some situations will require the assistance of a Tier 2 support team
- You create the incident in Magic Self-Service
- Monitor the status of your incidents
- Close the incidents that you create when they are resolved

Logging into Magic Self-Service

- Remember, Magic Self-service is a web application:
  - Accessed via your web browser
  - No special software to install
- Link: https://sdesshd.osc.state.ny.us/helpdesk

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Tracking Incidents You Created

- Click the “Incidents” tab at the top
- The default view is “My Incidents” and “Open” Incidents
- Three choices of what types of incidents to display
  - Open
  - Closed
  - Open and Closed
- Double-click on a column’s title to sort by that value

Tracking Incidents for Your Agency

- Very similar to “My Incidents”
- Click the “Incidents” tab at the top
- Use the pull-down menu under “View” and choose “My Company’s Incidents”
- Three choices of what types of incidents to display
  - Open
  - Closed
  - Open and Closed
- Double-click on a column’s title to sort by that value

Narrowing Your Search

- Please note the pull-down menu for "Filter by"
  - Incident Number
    - Search for a single incident, by number
  - Status
    - Find all incidents with a certain status
  - First Name & Last Name
    - Find all incidents by the client's first / last name
  - Open Date & Time
    - Find incidents opened on a specific date

Narrowing Your Search, *continued*

- More “Filter by” options
  - Incident Description & Incident Resolution
    - Find incidents that start with a text string that you enter
    - Capitalization counts (“UNIX” vs. “unix”)
    - No Wildcard characters allowed
    - Example: Put the word “UNIX”
      - If the first word of the incident description is “UNIX”, that incident will be listed
      - If the description *contains* the word UNIX, but not as the first word, it will ***not*** be listed
  - Category Description
    - Find all incidents with the same Category ID code

Incident Status: Definitions

- **OPEN:** The incident is assigned to a group, but not yet to an individual subject matter expert. This is the first step of the incident creation and resolution process.
- **ASSIGNED:** The incident is assigned to a subject matter expert.
- **ACKNOWLEDGED:** A subject matter expert has acknowledged receipt of the incident; it is in his/her work queue.
- **IN PROGRESS:** The subject matter expert is actively working on the incident.

Incident Status: Definitions, *continued*

- **AWAITING CLIENT:** The incident is awaiting additional information requested from the client.
  - It is critical that clients respond promptly to requests for information.
- **AWAITING DEFECT:** The incident is awaiting the resolution of a related system defect.
- **AWAITING ISSUE:** The incident is awaiting the resolution of a related project issue.

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Incident Status: Definitions, *continued*

- **RESOLVED:** Currently required work has been completed on the incident. Retesting by the client may be required.
  - The incident will be closed.
- **INVALID REQUEST**
  - We use this status to indicate the client should create a new incident with complete, correct information and complete, required attachments.
  - Equivalent to **RESOLVED** – leads to incident closure.
- **NO FURTHER ACTION**
  - Typically used when an incident is redundant or not or is no longer actionable by SFS.
  - We use this status to indicate we acknowledge receipt, but will take no further action.
  - Equivalent to **RESOLVED** – leads to incident closure.

Incident Status: Definitions, *continued*

- **CHANGE REQUEST**
  - Used when we have identified the client's request as a potential future system enhancement.
  - We use this status to indicate the request will be closed within the SDE Magic system, and will be tracked by the PMO in the SFS Change **Management system**
- **CLOSED:** The resolution of the incident has been reviewed for accuracy and completeness. This is the final step of the incident creation and resolution process.

Viewing Details of an Incident

- In any column view screen, double-click on an incident to open that incident and view the details
- Or, single-click to select it and then click the [View] button
- You will see basic information about the incident:
  - Category Code
  - Open & Due Date
  - Client Information
  - Incident Description Text
  - Incident Resolution Text (if the incident is already resolved)
  - Additional Notes
    - Do not write new material here. We do not see this text at SFS.
  - File attachments
  - Step-by-step incident details.

Only One at a Time

Something to keep in mind…

- Only one user at a time can have an incident *detail* window open
- Other users who try to open the incident detail window will have "read only" access
- By having an incident detail window open, you might make it harder for the 2nd Tier team to work on and resolve your incident

As a result…

- Please try to limit how often you "check an incident's status" in the full detail window.
- It's better to look at the status in the default column view.

Creating a New Incident

- Two ways to create a new incident:
- Using a "Quick Ticket"
  - The incident window is pre-loaded with questions you need to answer
  - Easier
- Freeform
  - The incident window starts blank
  - More detailed knowledge of Magic required
- At this time, please only use the Quick Ticket method
  - If your situation does not fit any of the Quick Tickets available, please contact the SFS Help Desk. We will create the incident on your behalf.

Technical Limitations

- The “Incident Description” text field can hold a maximum of 4,000 characters
  - This is about 1 ½ pages of text in paragraph format
  - It is rare to exceed that, but it’s possible
  - Please note: **Magic does not warn you** that you are over the limit. It will accept the incident, but there will be problems with that record in the SQL database
  - When in doubt, draft your text in Microsoft Word and use the “character count” function to be sure you don’t exceed 4,000 characters.
- File attachments cannot be larger than 1.4 MB
  - You can have several attachments whose total size exceeds 1.4 MB, but any one attachment cannot be larger than 1.4 MB.

Quick Tickets

- Remember, always create an incident by using a “Quick Ticket”
- Separate Quick Tickets for the various SFS Support Roles
  - Agency Security Administrator (ASA)
  - Workflow Administrator (WFA)
  - Employee Data Administrator (EDA),
  - Bulkload Liaison (BLL) **New in September 2012**
  - User Support Liason (USL),
  - Super User (SU)
- Please do not use a Quick Ticket for a role that you do not have.

Quick Tickets, *continued*

- The questions in the “Incident Description” field are designed to help you provide everything the SFS Tier 2 support teams need to resolve your incident
- Please answer all the questions asked
- We will not be able to work on incomplete incidents.

Quick Tickets for Other Roles

- Please **do not** use a Quick Ticket template for a role that you do not have assigned to you
  - Example: ASAs should not submit Workflow Administrator (WFA) incidents
  - We are working to implement an internal check to prevent this, but it is not yet running
  - For now, we will be checking manually
- At SFS, our incident window shows us the Tier 1 roles a client is assigned
- If we do not see you are a recognized role holder, we will contact your Agency Coordinator for clarification and correction.

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Listing of Quick Tickets

Workflow Administrators (WFA)

- Workflow Re-Route
- Workflow Failure
- General Workflow Issues

Employee Data Administrators (EDA)

- Cannot find staff
- Cannot find Buyer
- Cannot find Buyer Manager
- Employee Mass Extract/Import

Listing of Quick Tickets, *continued*

User Support Liaisons (USL) and Super Users (SU)

- Processing Error
- General Question

Agency Security Administrators (ASA)

- Password Reset
- Access Request
- Access Issues
- General Security Questions

Listing of Quick Tickets, *continued*

Bulkload Liaisons

- Bulkload Extract Not Received
- Bulkload Extract Content
- Bulkload ENL Errors
- Bulkload IDL Not Received
- Bulkload IDL Errors

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Attaching a File to an Incident

- There are several types of quick tickets that will require you to attach a file to the incident
    - Security Forms, Screen Shots, etc.
- You cannot attach a file to an incident until it is formally created

<u>Steps</u>

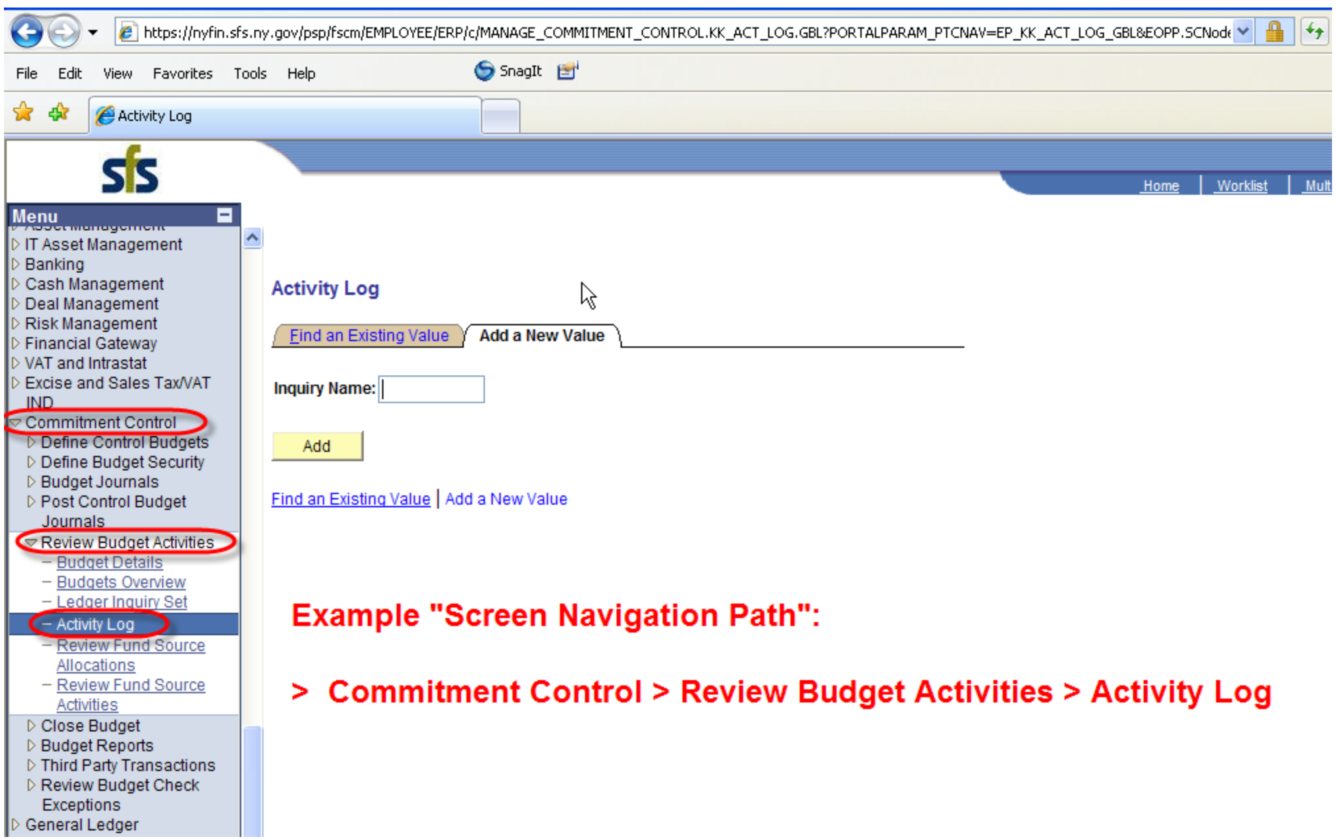
1. First, you answer all the Quick Ticket questions, and click the [Submit] button
2. When an incident has a six-digit number, that means it is now formally created
3. Now the [Attach] button will change from grey to black
4. Click the [Attach] button and upload the file attachment

    Remember: maximum size = 1.4 MB

5. Click the [Submit] button again
6. The file is now attached.

Navigation Path

- Some incident Quick Tickets ask for the Navigation Path
- This is **very** helpful for us when troubleshooting. Please provide it when asked.



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Closing Incidents

- When an incident is resolved, the person that created it is the person who changes the status to CLOSED
  - “The person who gives birth to the baby is the person who has to put the baby to bed”
- Review what the 2nd Level Support person wrote in the “Incident Resolution” field
- Confirm that the incident is indeed resolved
  - If not, please contact the SFS Help Desk and we will reassign it to be completed.
- Click the [Close] button to close an incident

Closing Incidents, *continued*

- Please remember: Closing an incident is an administrative function.
  - "Resolved" status is what the client really wants to see
    - Resolved = The problem is fixed, or the question is answered.
- Be careful
  - Normally, only the person who opens an incident can close it.
  - With Magic Self-service, you will be able to close incidents opened by other people in your agency.
    - We are working on a system fix, but it is not yet implemented
  - Please be sure you only close your own incidents
    - These will show on your "My incidents" screen

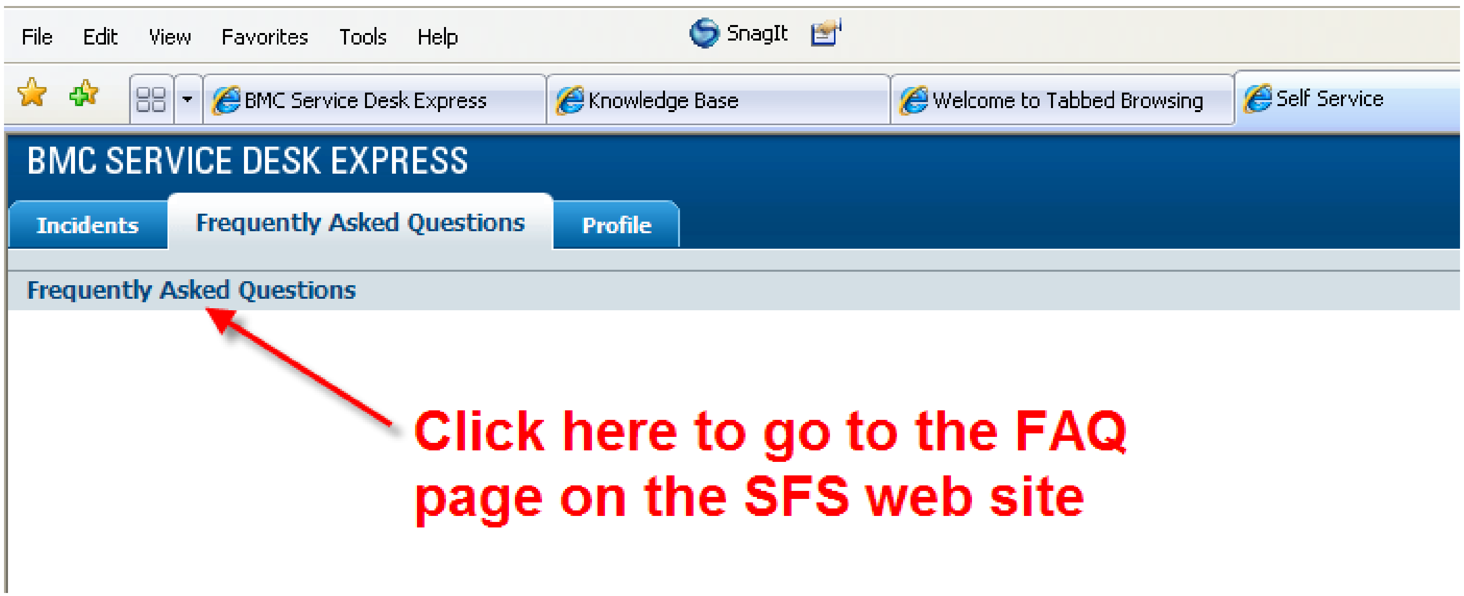
You Are Our (SFS's) Client

Please remember…

- You are opening the incident on behalf of the person in your agency that needs assistance
- It's natural for you to think of that person, the user, as the client
- However, from the SFS perspective, **you** are the client
- **You** are the person we interact with
- That's why it is appropriate for **you** to be identified as the client on the incident
- *But*, you will enter the **user's** information in the "Incident Description" field.

Frequently Asked Questions (FAQs)

- Tab on the top of the screen
- This takes you to what looks like a blank screen
- Click the words "Frequently Asked Questions" (this is a web link)
- Takes you to the FAQ page on the SFS web site



User Profile Tab

- This is your client information in Magic SDE
- Please make any corrections necessary
- Please also fill in any blanks
- You can change your password on this screen

Logging in to Magic Self-Service

- You should have received an email with your Client ID
  - If not, please email us at the SFS Help Desk (HelpDesk@sfs.ny.gov)
- Go to the login screen URL (https://sdesshd.osc.state.ny.us/helpdesk)
- Click the "Forgot Password?" link
- Fill in your Client ID
- The Magic server will email you your password
  - Please note, it may take up to 15 minutes to receive the email with your password
- We suggest you go to the "User Profile" page and change your password.

Questions?

- If you have questions about using Magic Self-Service, please contact the SFS Help Desk:
  - HelpDesk@sfs.ny.gov
  - (518) 457-7737
  - (877) 737-4185

Thank you!

Last Update: September 21, 2012

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