ITA Service Request Training

-Cable Television- -Connectivity Services- - Telecommunications-

Sept 2011

This briefing is unclassified

UNCLASSIFID

Service Request Module Login

HQDA Customers

https://itaitsm.hqda.pentagon.mil/arsys/home

Non-HQDA Customers

https://itaitsmext.hqda.pentagon.mil/arsys/home

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- Overview and Background
- Service Request Module (SRM)
- Navigating SRM
- Requesting Service
- Providing Additional Information
- Approving Requests
- Service Ordering Changes
- Key Takeaways

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- **Overview and Background**
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Overview and Background

- **How did we get here?**
  - In an effort to provide unparalleled Customer service and improved efficiencies, ITA embarked on a organizational transformation
  - Part of the transformation included the stand-up of the Remedy 7.6 Information Technology Service Management (ITSM) System and it's Service Request Module (SRM)
- **What is SRM?**
  - SRM is the customer-facing self-service portal within Remedy, specifically designed to enable customers to directly submit service requests to ITA
- **What are the benefits?**
  - Customers now have a single system and approach for requesting products and services from ITA
  - Customers can submit and track tickets at their own convenience utilizing a simple and intuitive self-help portal
- **When will I see the changes?**
  - SRM goes live on 30 September 2011

Service Request Module Overview

- SRM empowers Customers to take more control over their service requests by enabling the self-submission of requests directly to ITA
- SRM ensures requests are entered directly into ITA's Remedy tracking system where Customers can go to monitor the progress of their ticket
- SRM enables CAC authentication for entitled Customer groups to logon to the system, including IMOs, Alternate IMOs, TSCOs, etc.
- SRM standardizes both request submission and gathering through detailed questionnaires that benefit both ITA and it's Customers
- SRM Benefits:
  - Structured questions that define known data points necessary for ITA to capture a requirement and provide service
  - Less time revisiting requests to gather additional information
  - Enhanced tracking capabilities

SRM and Customer Support

- Given the added benefits and ease of use, ITA's preferred method of request submission is the self-service SRM Portal
- ITA's vision is to provide unparalleled Customer service; this includes providing multiple avenues for Customers to receive support
- Customers with questions related to ITA's Products and Services or the submission and tracking of service requests in SRM may contact the following:

ITA Consolidated Customer Service Center (CCSC)

hqdahelpdesk@conus.army.mil

703.693.4337

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Customer Access

- Customer access to the SRM Portal is based on entitlements
- Entitlements refer to individuals authorized to request services for their organization (IMOs, TSCOs, DARs, etc)
- Existing ITA Customers that had access to the 5E Portal as of September 2011 will have SRM access rights granted
- These Customers will only see the products and services they are entitled to request
- SRM is CAC enabled

SRM Links

HQDA Customers

https://itaitsm.hqda.pentagon.mil/arsys/home

Non-HQDA Customers

https://itaitsmext.hqda.pentagon.mil/arsys/home

New User Access

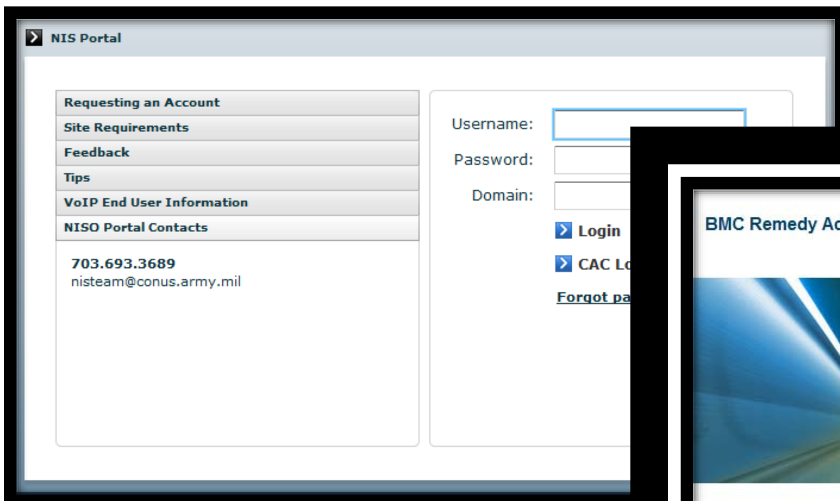
- Maintaining an accurate and current list of entitled Users is extremely important for the functionality of the SRM Portal, as well as providing Customer Service
- It is the responsibility of current users to inform ITA of changes to authorized users, including additions and deletions
- Following the initial SRM launch, new users (i.e., new IMOs/ TSCOs for existing customers) must contact ITA CCSC to initiate the SRM on-boarding and entitlements process

Customer Portal

- Customers accessing the new Remedy System which houses the SRM Portal after 30 Sept 2011 will need to utilize the links below

Current System: Prior to 30 Sept 2011

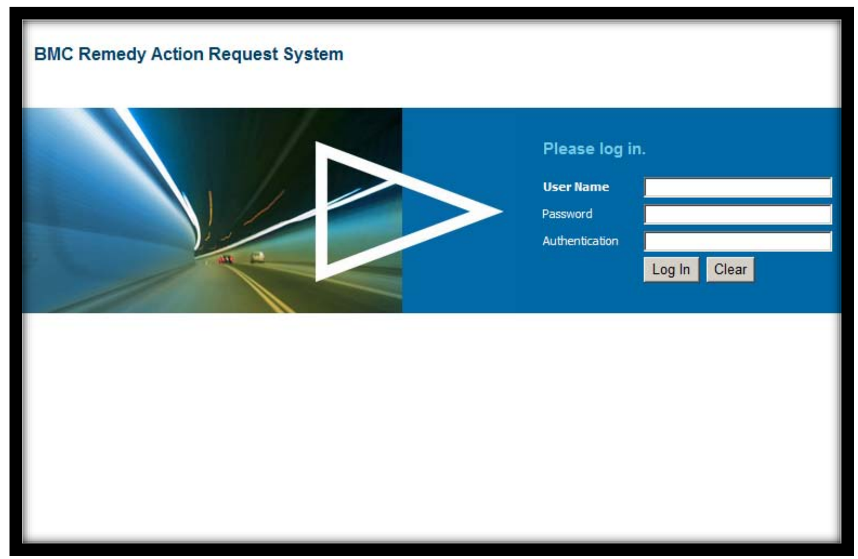
Legacy 5E Portal



https://nis.pentagon.mil/

New System: 30 Sept 2011

SRM Portal



HQDA Customers: https://itaitsm.hqda.pentagon.mil/arsys/home
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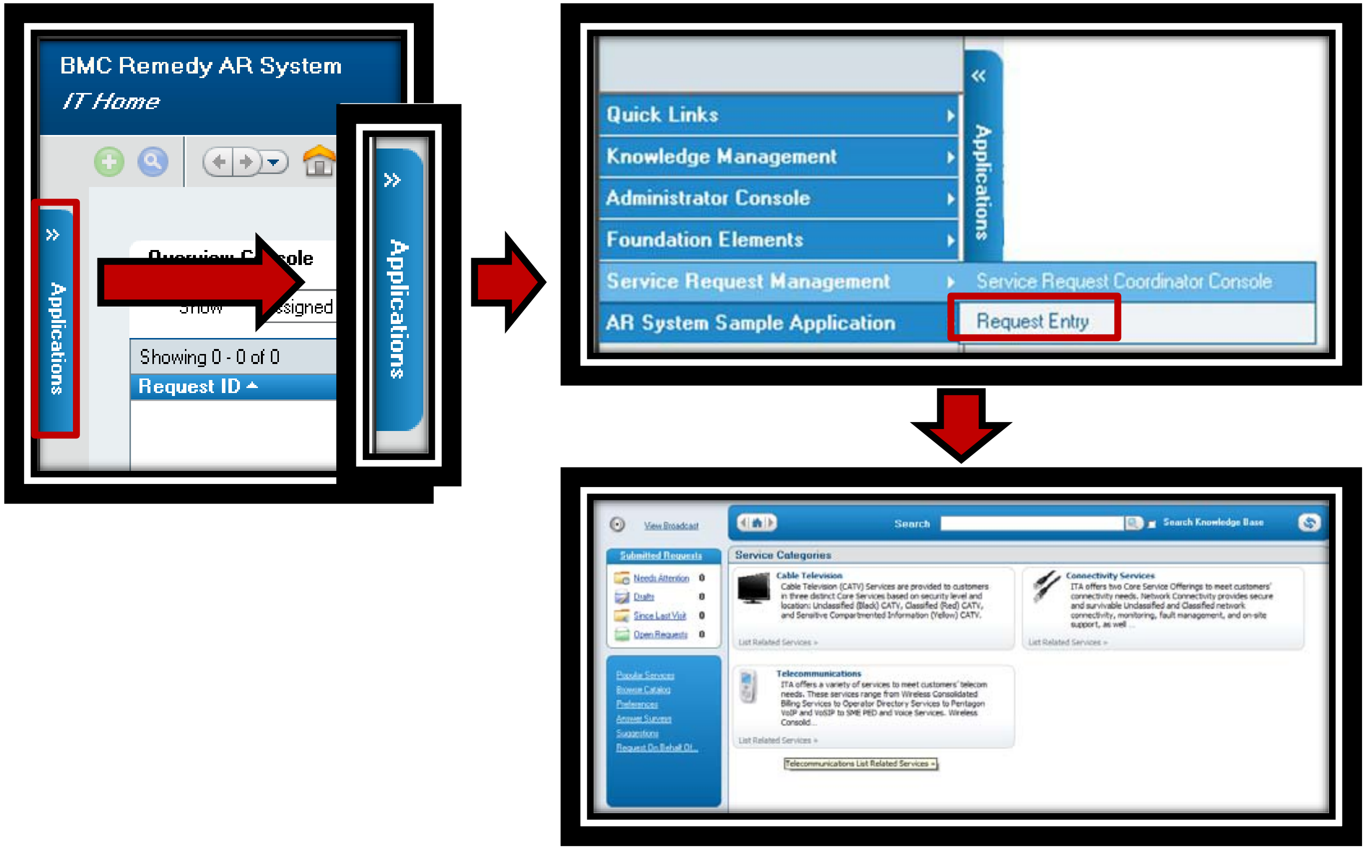
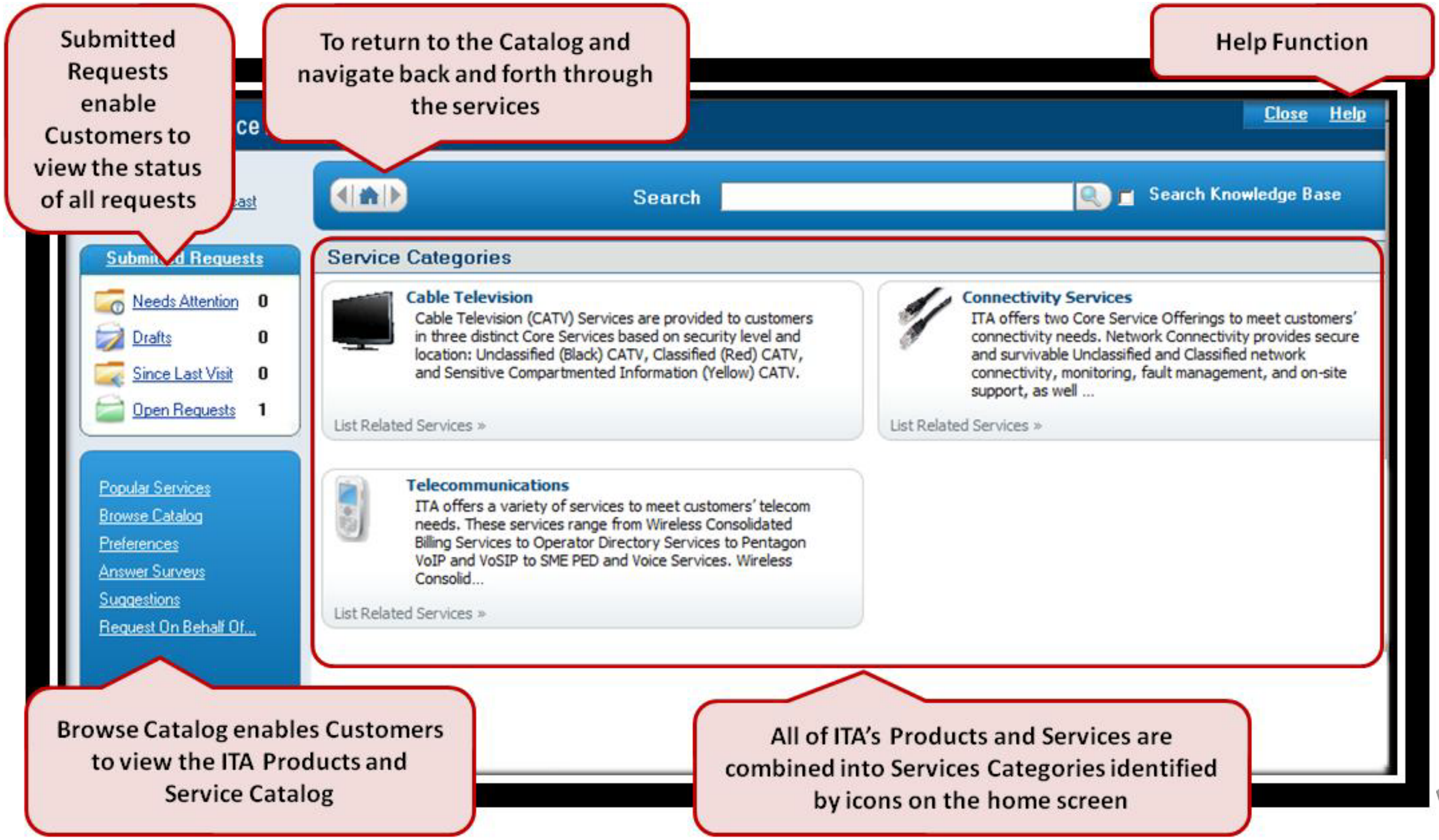
Remedy Home Screen

- Customers will initially be directed to the Remedy Overview Console
- To submit a requirement, navigate to the SRM Home Screen by selecting “Request Entry” within the Applications Toolbar on the left-hand side of the screen



SRM Home Screen

- Once in the SRM home screen, Customers will find a list of ITA's products and services
- Users will also be able to review requests made and reopen draft requests



Service Requests Types

- ITA aligned requests for service within SRM around three Request Types
  - ***New***
    First time request for service
  - ***Change***
    Update/change to an existing service
  - ***Deactivate***
    Cancelation of service, including a portion of service or complete deactivation

- The use of these predefined Request Types provides Customers with a consistent experience and logic when requesting services
- When a Customer initiates a request by selecting a given service, they will notice that each Request Type is clearly differentiated within the screen
- Each Request Type will prompt the Customer to complete a questionnaire specific to the intended actions (new, change, deactivate)

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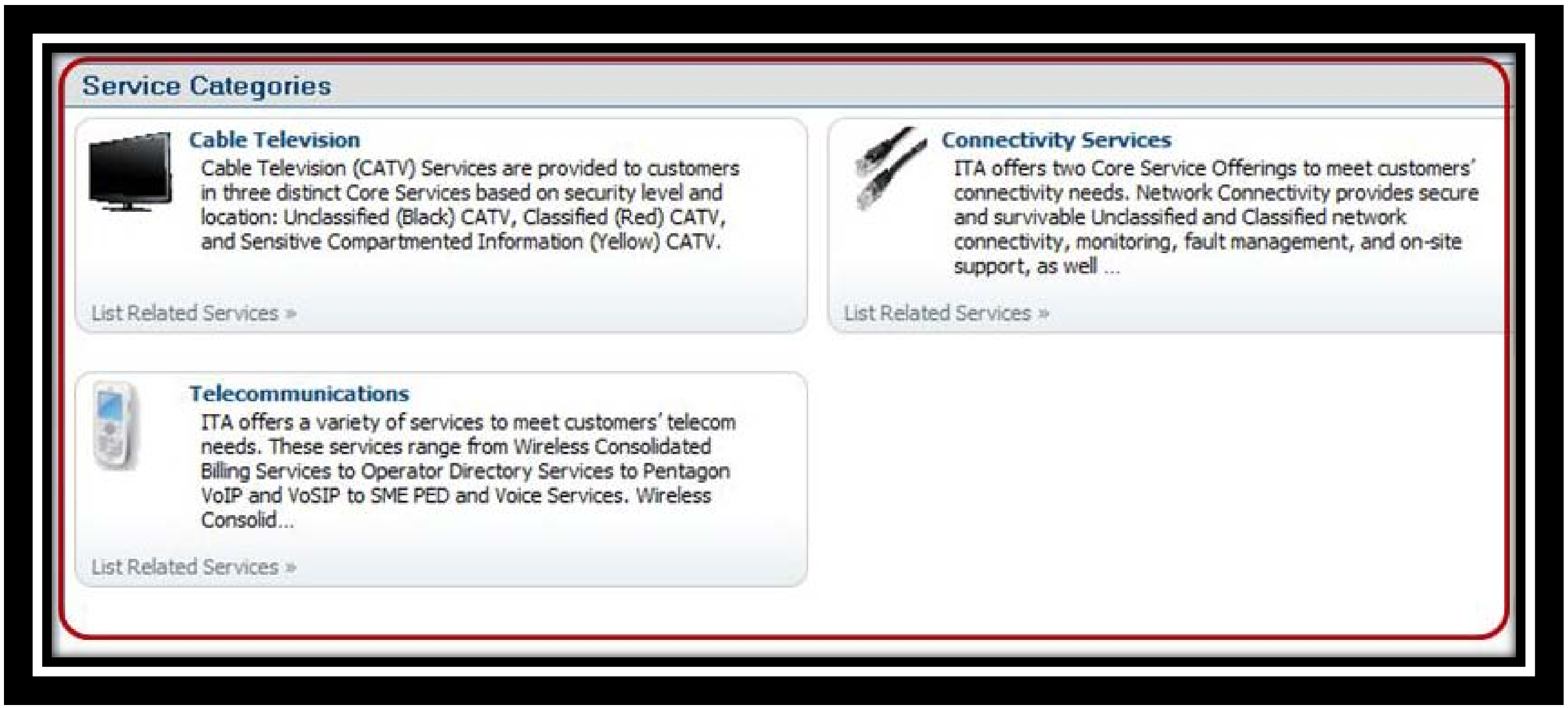
Service Categories

- I2TS Services, including those formerly captured within the 5E Portal, are grouped into three Service Categories within SRM

-Cable Television- -Connectivity Services- - Telecommunications-



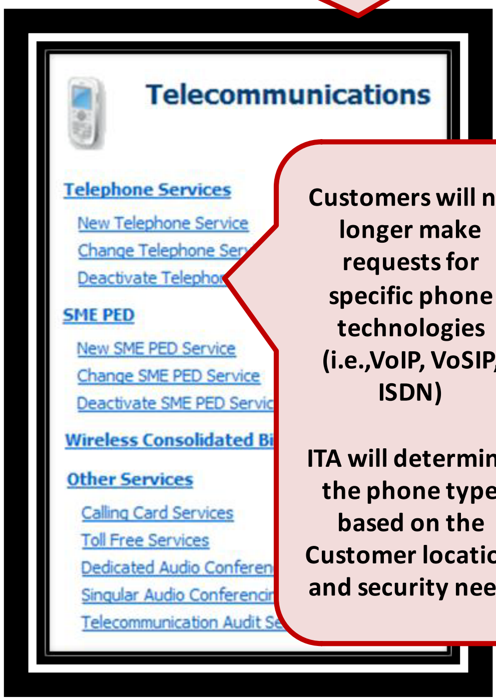
I2TS Service Sub-Categories

- Each Service Category contains Sub-categories that include all related ITA Products and Services

Each Service has the option to select New, Change or Deactivate

Connectivity Services includes Network Connectivity.

Telecommunications includes all desktop phone services, SME PED, Wireless and others



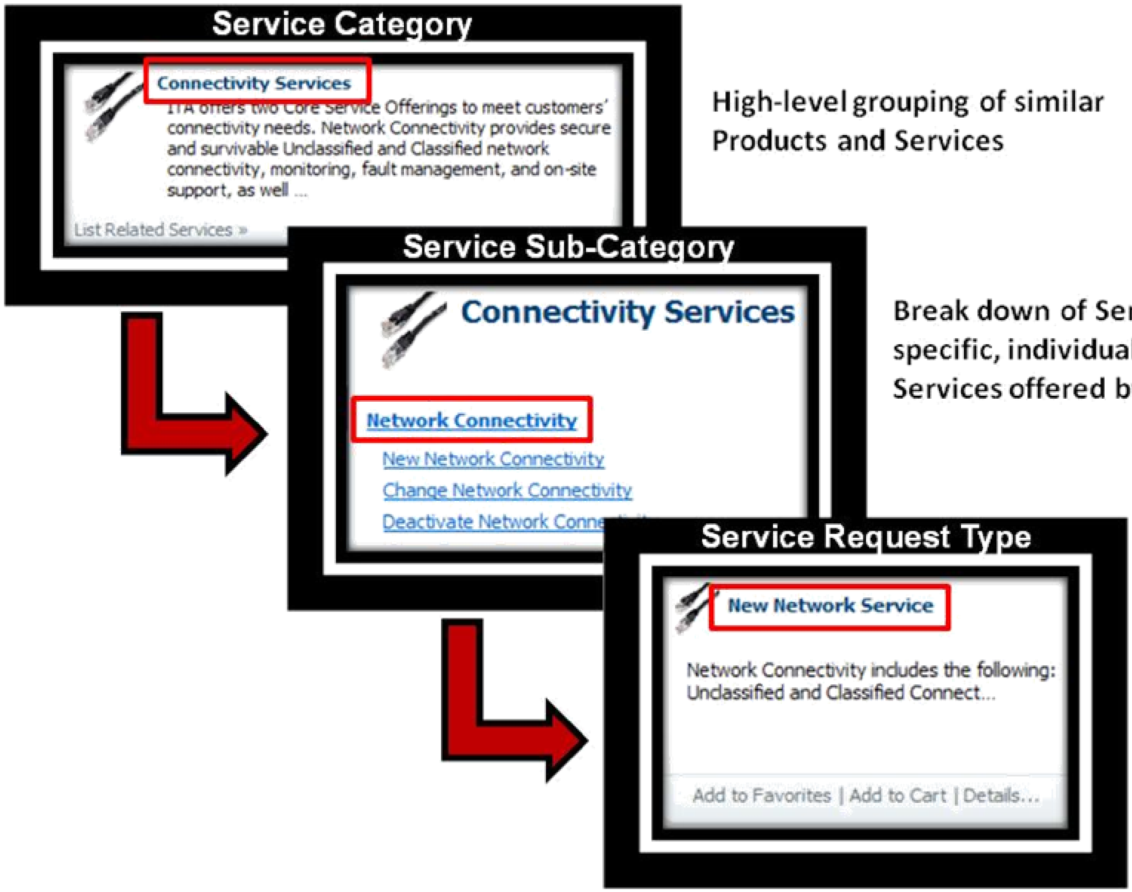
Customers will no longer make requests for specific phone technologies (i.e.,VoIP, VoSIP, ISDN)

ITA will determine the phone type based on the Customer location and security need

Wireless Consolidated Billing and Other Services provide a direct link to SecureWeb

Service Navigation Breakdown

- Sub-categories contain the Request Types that will enable the Customer to access the associated questionnaire and submit their service request



High-level grouping of similar Products and Services

Break down of Service Categories into specific, individual Products and Services offered by ITA

Desired actions/requests of the Customer for a chosen Product or Service

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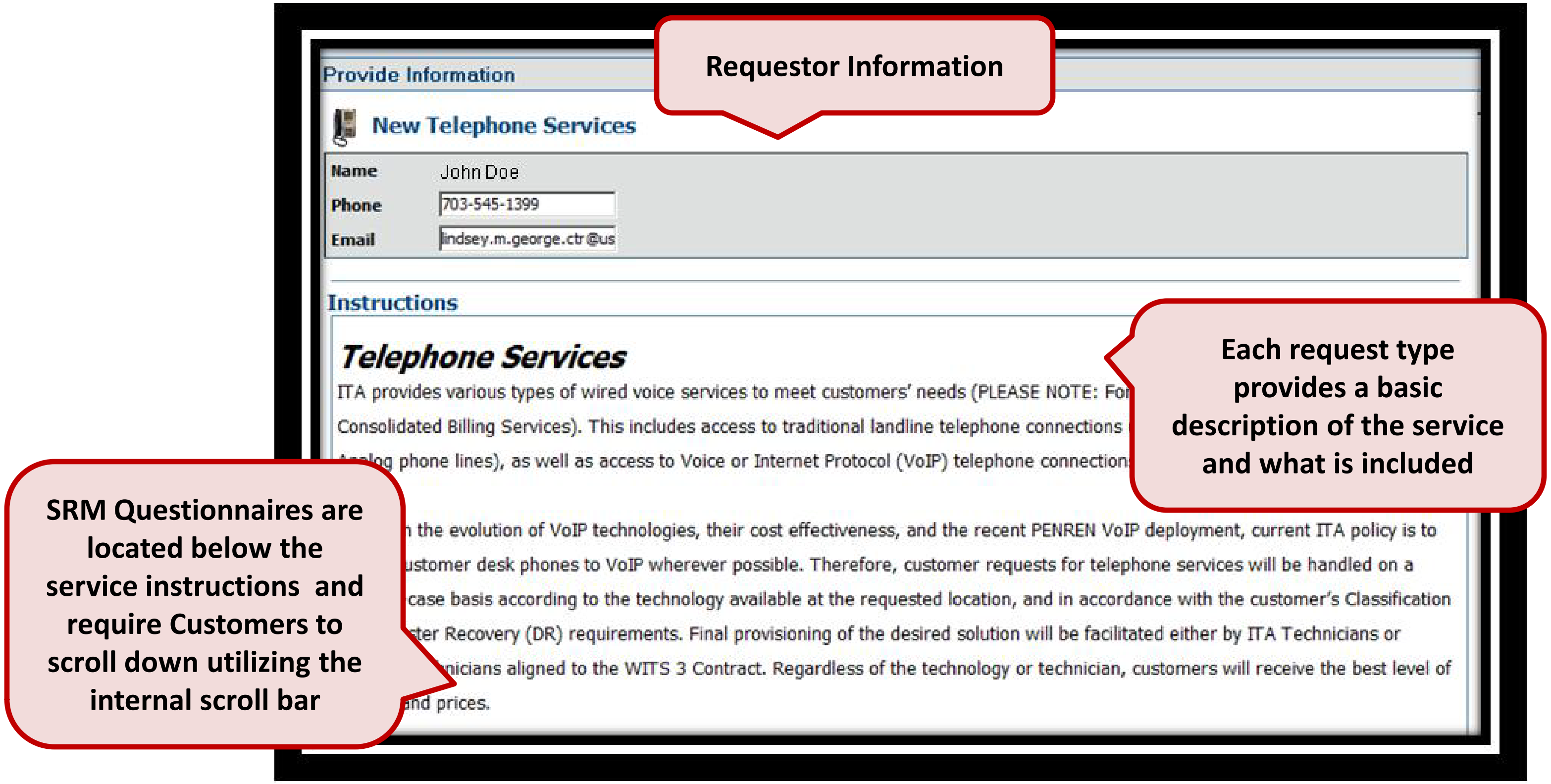
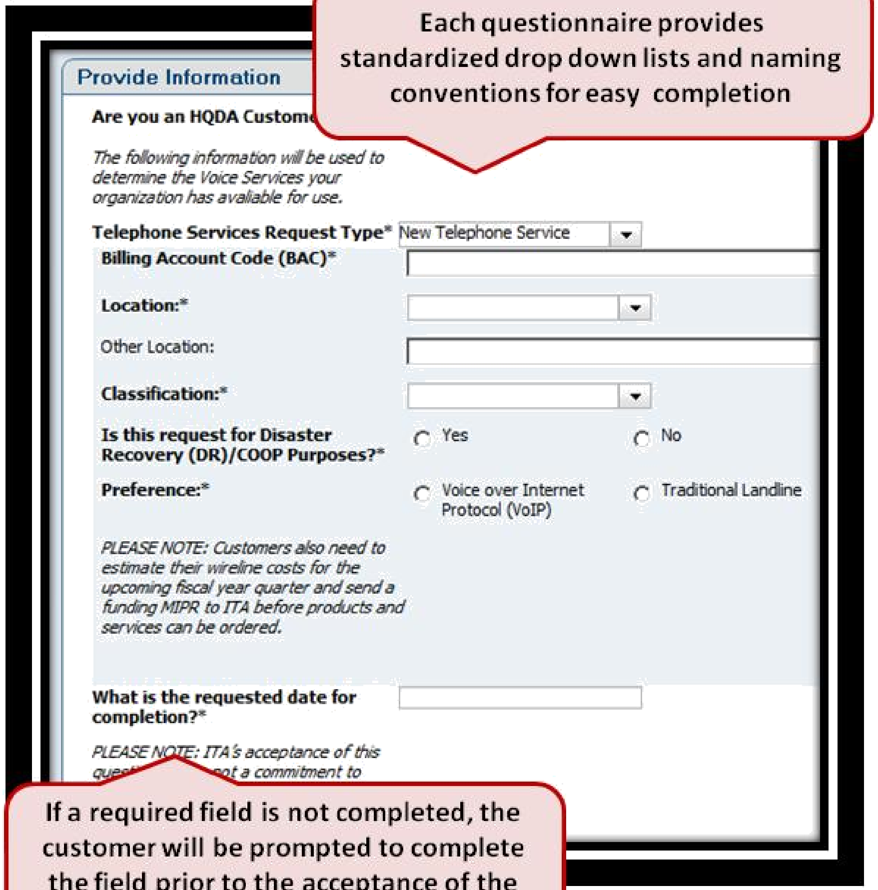
Initial Service Request

- Once the request type is selected, Customers are prompted with a questionnaire screen directly correlated to that Request Type
- The Requestor information is automatically populated within a field located at the top of the request



SRM Questionnaires

- Each Request Type has its own questionnaire essential to capture the requirement
- Each questionnaire enables ITA to begin request analysis upon ticket submission while requiring less Customer follow-up
- Once all required fields are complete, Customers can “Submit” the request using the button located at the bottom right of the screen
- Customers have the option to select “Draft” also located at the bottom right of the screen and return to the request at a later time

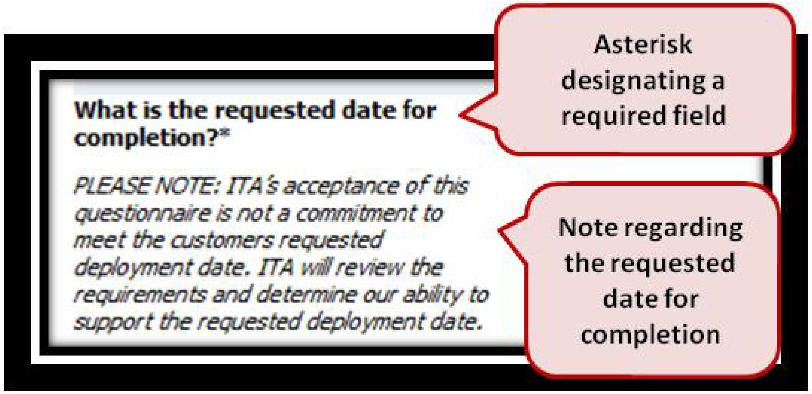


Each questionnaire provides standardized drop down lists and naming conventions for easy completion

If a required field is not completed, the customer will be prompted to complete the field prior to the acceptance of the submission

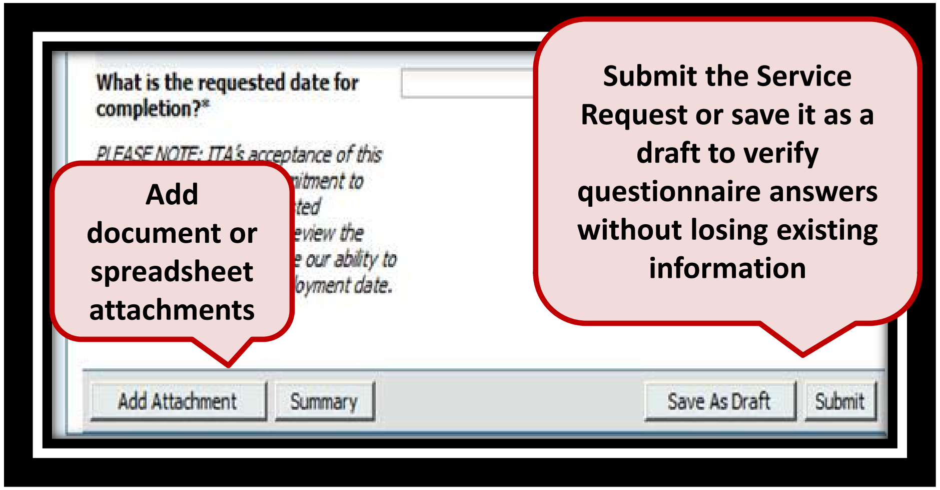
Standard Rules and Required Fields

- A service request submitted through SRM does not contractually obligate ITA to provide the service
- A service request enables ITA to analyze the request and determine the best solution for the Customer and ITA
- Each service questionnaire contains fields that were determined by ITA Subject Matter Experts to be required
  - Each required field is designated with an asterisk
  - Customers will not be able to submit a request without completing the required fields
- Each service questionnaire may also contain italicized informational notes to assist the Customer by providing useful information for answering certain questions



Requirement Submission

- Customers will be able to submit their requirements upon completion of all required questionnaire fields
  - If a required field is not completed, the customer will be notified during submission
  - SRM will inform the customer of field(s) that require completion by placing a red box around the question
- Customers may be asked and/or wish to attach certain documents related to the request
- Customers may save requests as drafts if necessary to obtain additional information or to simply complete at a later date



Requirements Submission Roles

- Entitled users can hold one of two roles within the requirement submission process:
  - Submitter: A person within a Customer Agency who has the entitlements to submit requirements
  - Approver: A government employee within a Customer Agency who has the entitlements to submit requirements and approve Submitter's requirements
- Some Submitters have the authority to submit requirements without the need for additional government approval
- Other Submitters (i.e., contractors) must have their requirements approved by a government employee
- Within the SRM Portal all requirements must be approved regardless of the Submitter's need for approval or not
- Submitters that do not need additional government approval will approve their own requirements within the system

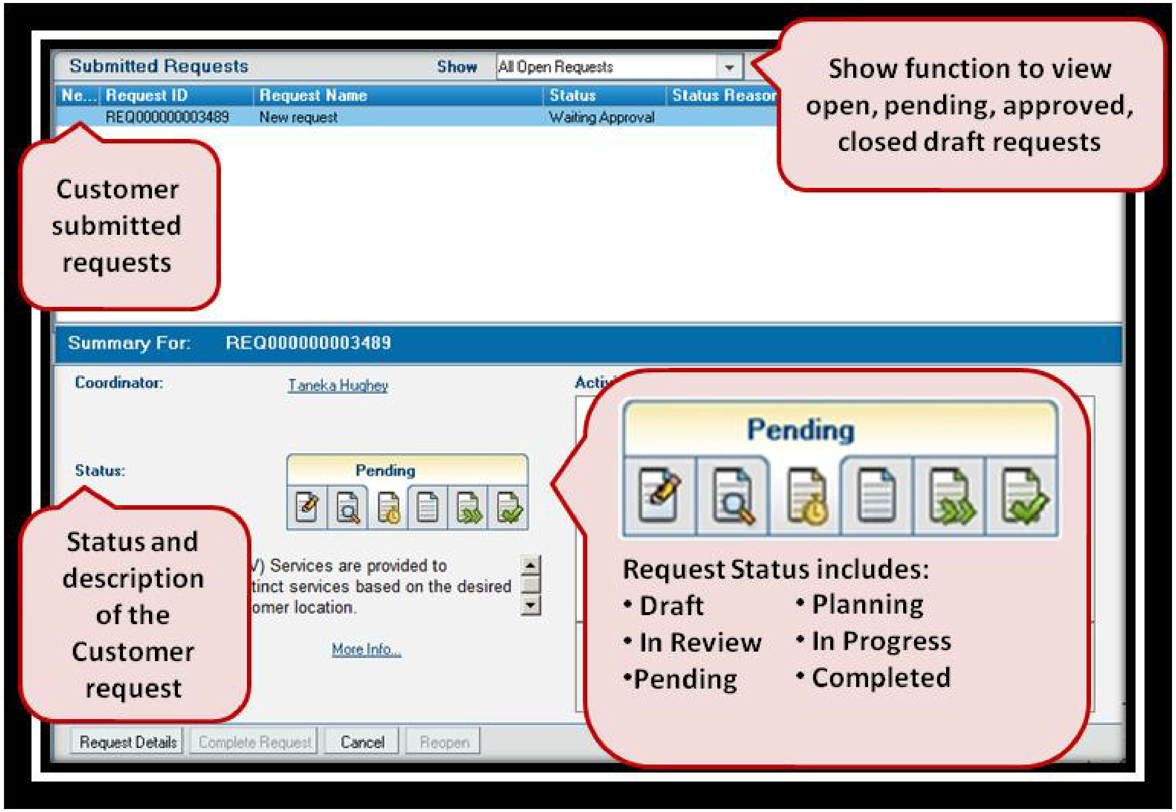
Please Note: Additional details regarding Approvals will be provided later in this training

SRM Process

- Approved service requests submitted through SRM will generate tickets within ITA's Remedy System
- Each service that ITA provides has a predefined support group who will receive the request and is responsible for beginning the review process
- Tickets will pass through ITA via a series of process steps and approvals
- Customers can monitor the status of their tickets via the SRM Portal
- In some cases, ITA will contact the Customer regarding the service request to capture additional information or discuss the need
- New Customers must contact ITA CRM to begin the on-boarding and entitlements process

Service Request Status and Tracking

- Customers can logon and review the status of each ticket
- This feature eliminates the need to directly contact ITA Personnel to make inquiries or request status updates



Ticket Status

- **Draft**: A Customer request that has not been submitted through SRM but saved as a draft
- **In Review**: The Customer request is available for review but has not been approved (Note: This status is an internal system status and will more than likely not be seen by the user when a service request is created for their request)
- **Pending**: Work on the Customer request has been temporarily suspended. The Approver will specify a status reason (i.e., ‘waiting for approval’ or ‘need more information’)
- **Planning**: The Customer request has been approved for implementation and ITA is currently planning the implementation, targeting dates and estimating costs
- **In Progress**: The Customer ticket is in working progress by the Fulfillment Providers
- **Completed**: The service request is updated to completed when it is closed in the fulfillment application. Users can update a completed service request, which creates a work order

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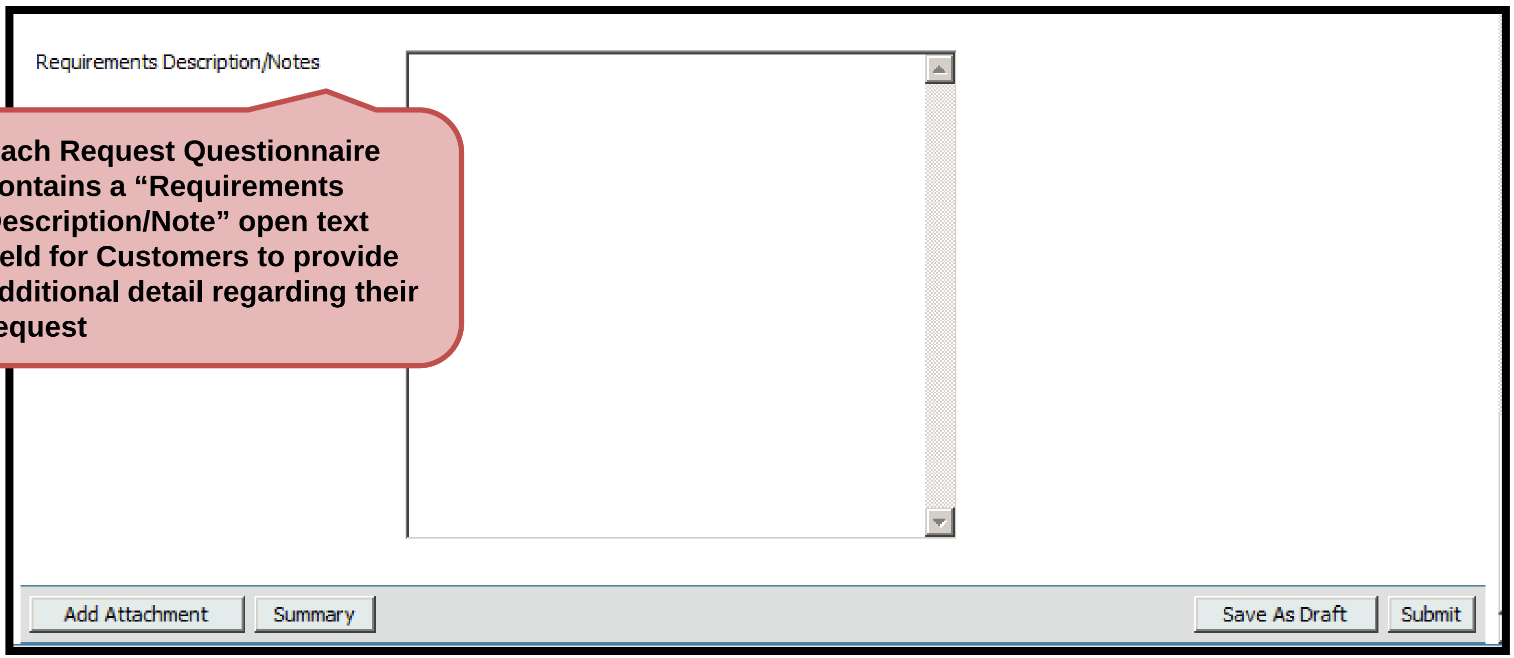
Adding Notes and Attachments to a Service Request

- Customers have the ability to add notes and attachments to all requests for service made through the new ITA Service Request Module (SRM)
- Customers may choose to add notes or attachments in order to provide ITA with additional details about their request that are not covered within the questions asked in SRM
- Customers may also add notes or attachments at a later date as the request moves through the provisioning process
- All notes will be visible within the request's "Summary" or "Activity Log" and visible by all those who see the ticket

Adding a Note to an Initial Request

- Customers wishing to provide ITA additional details about their request before the time of submission can do so at the end of each Service Questionnaire
- This process is the same for all ITA Services within SRM as well as the various request types, including New, Change and Deactivate

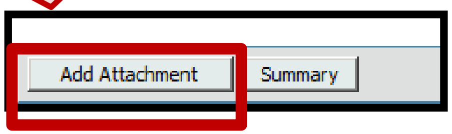


Each Request Questionnaire contains a "Requirements Description/Note" open text field for Customers to provide additional detail regarding their request

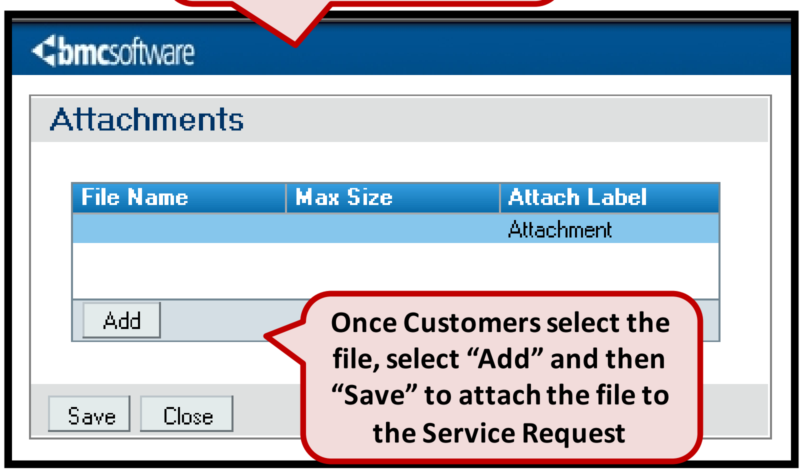
Adding an Attachment to an Initial Request

- Customers wishing to provide ITA additional details about their request through a document attachment before the time of submission can do so at the end of each Service Questionnaire
- This process is the same for all ITA Services within SRM as well as the various request types, including New, Change and Deactivate
- Please Note: Initial Requests will only accept one document attachment. If the request requires additional attachment, utilize the Activity Log

At the end of the Request Questionnaire, select “Add Attachment”



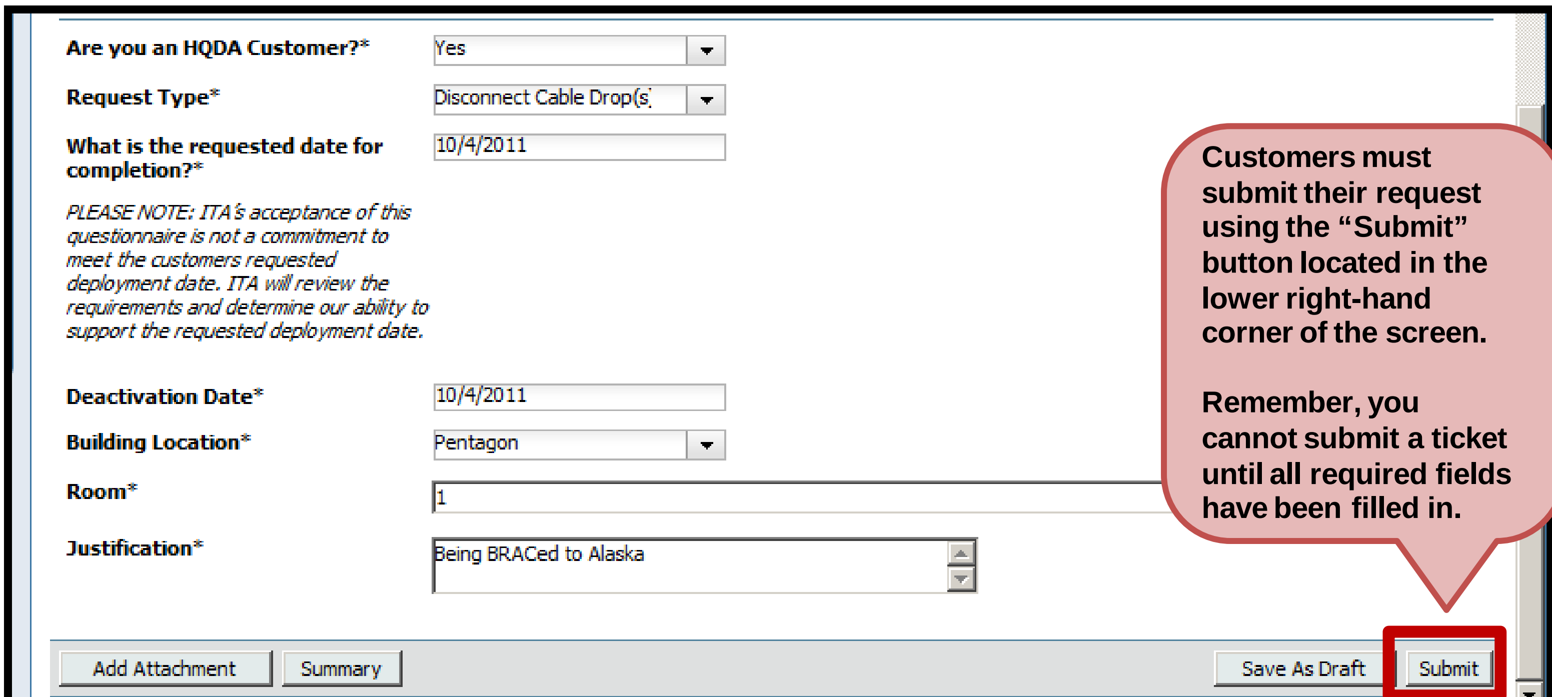
A new window will appear allowing Customers to browse their folders and select a specific file



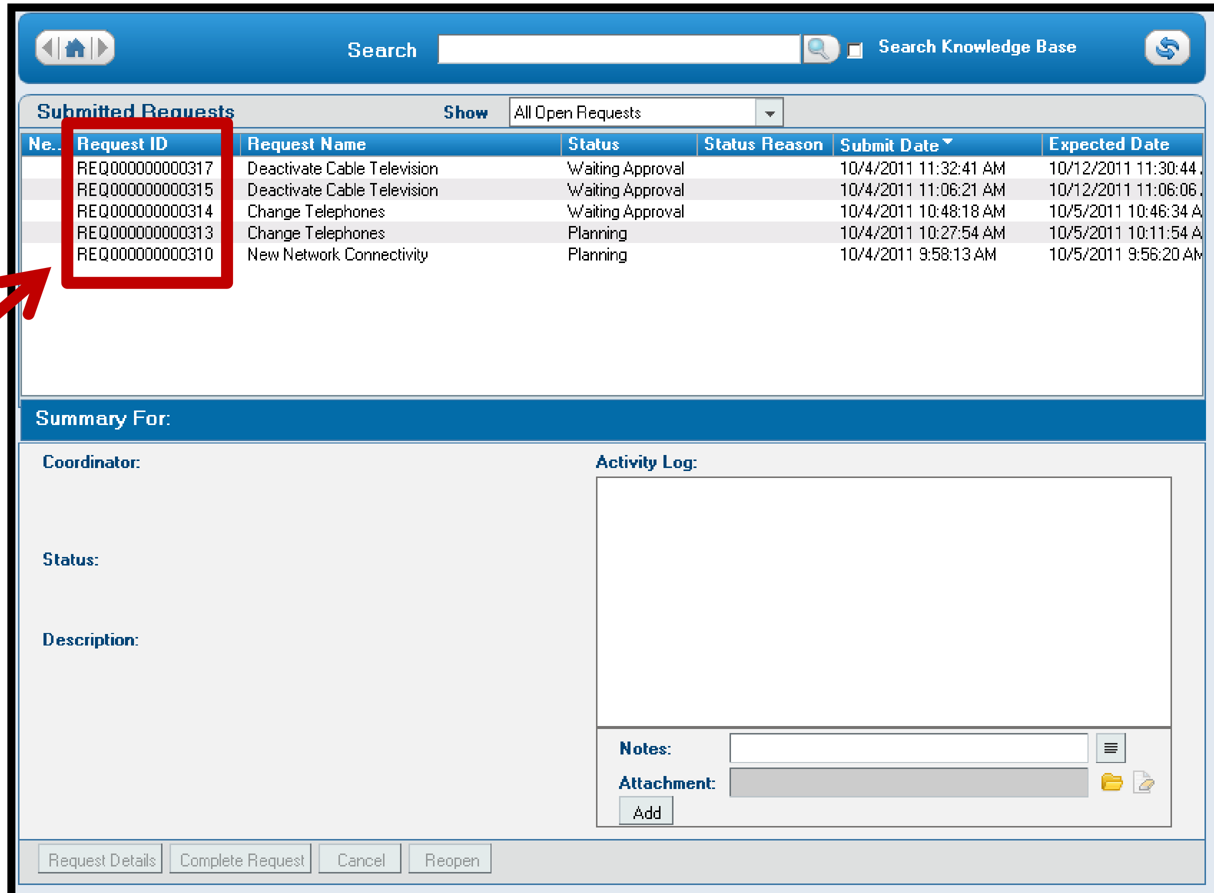
Once Customers select the file, select “Add” and then “Save” to attach the file to the Service Request

Adding Additional Notes or Attachments to a Request

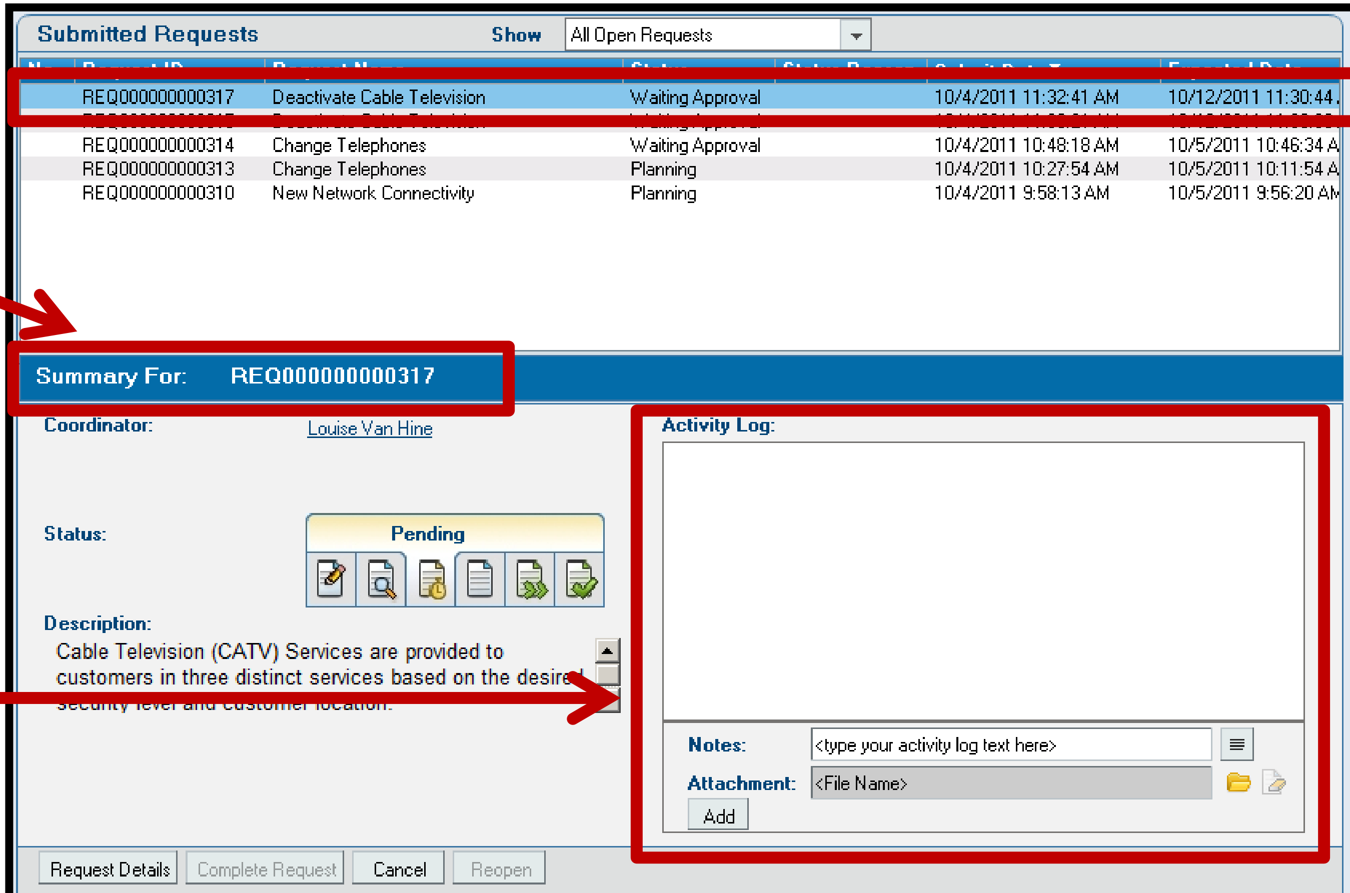
- Customers wishing to provide ITA additional details about their request after the time of submission can do so after selecting “Submit”
- This process is the same for all ITA Services within SRM as well as the various request types, including New, Change and Deactivate



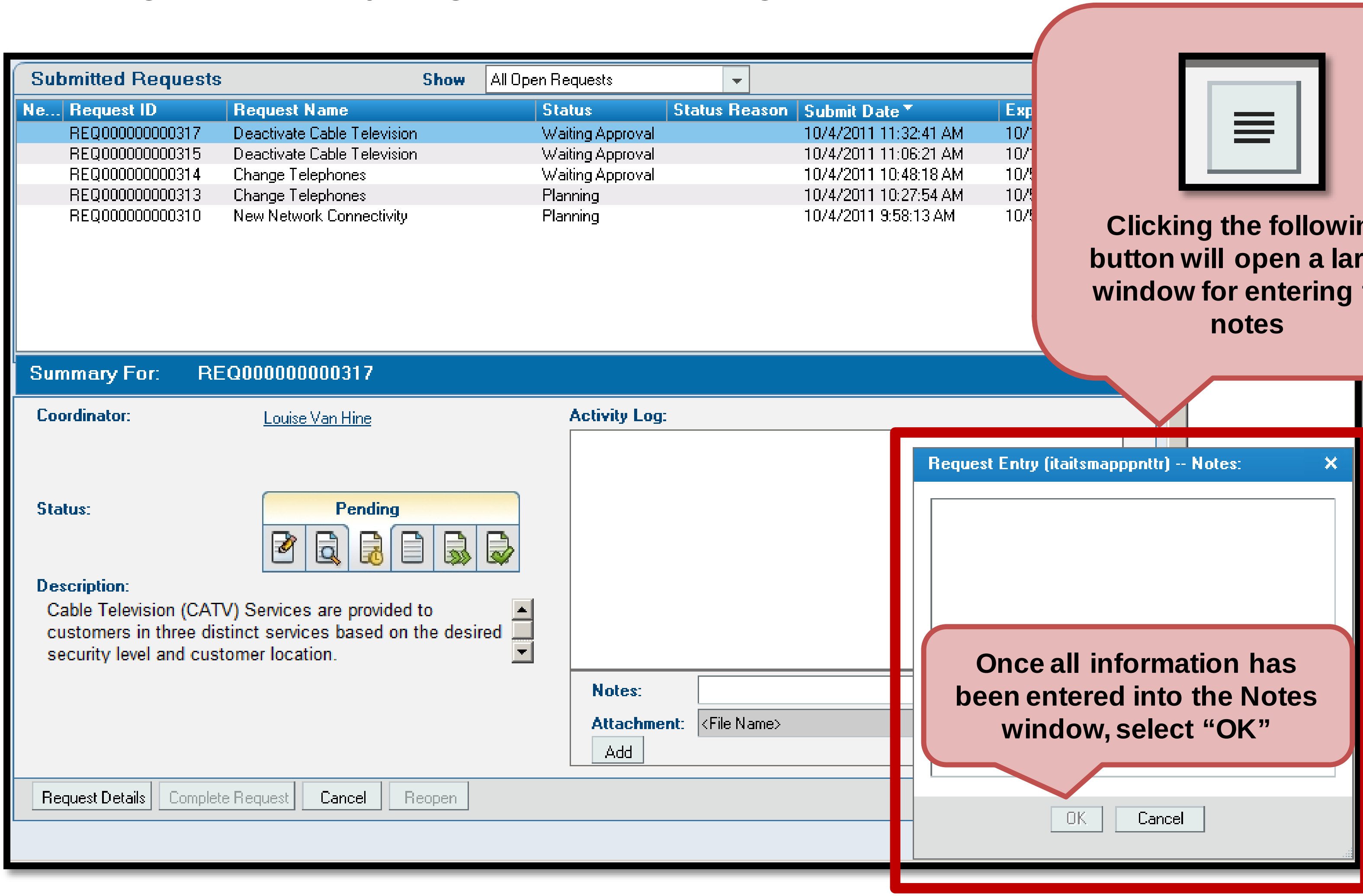
- After selecting “Submit”, Customers will be redirected to their “Submitted Requests” window which shows all requests the Customer has submitted
- Upon initial redirect to “Submitted Requests” no request will be selected
- Customers must select the Request ID to which they want to add notes
- Once a Customer select the Request ID, the request will be highlighted



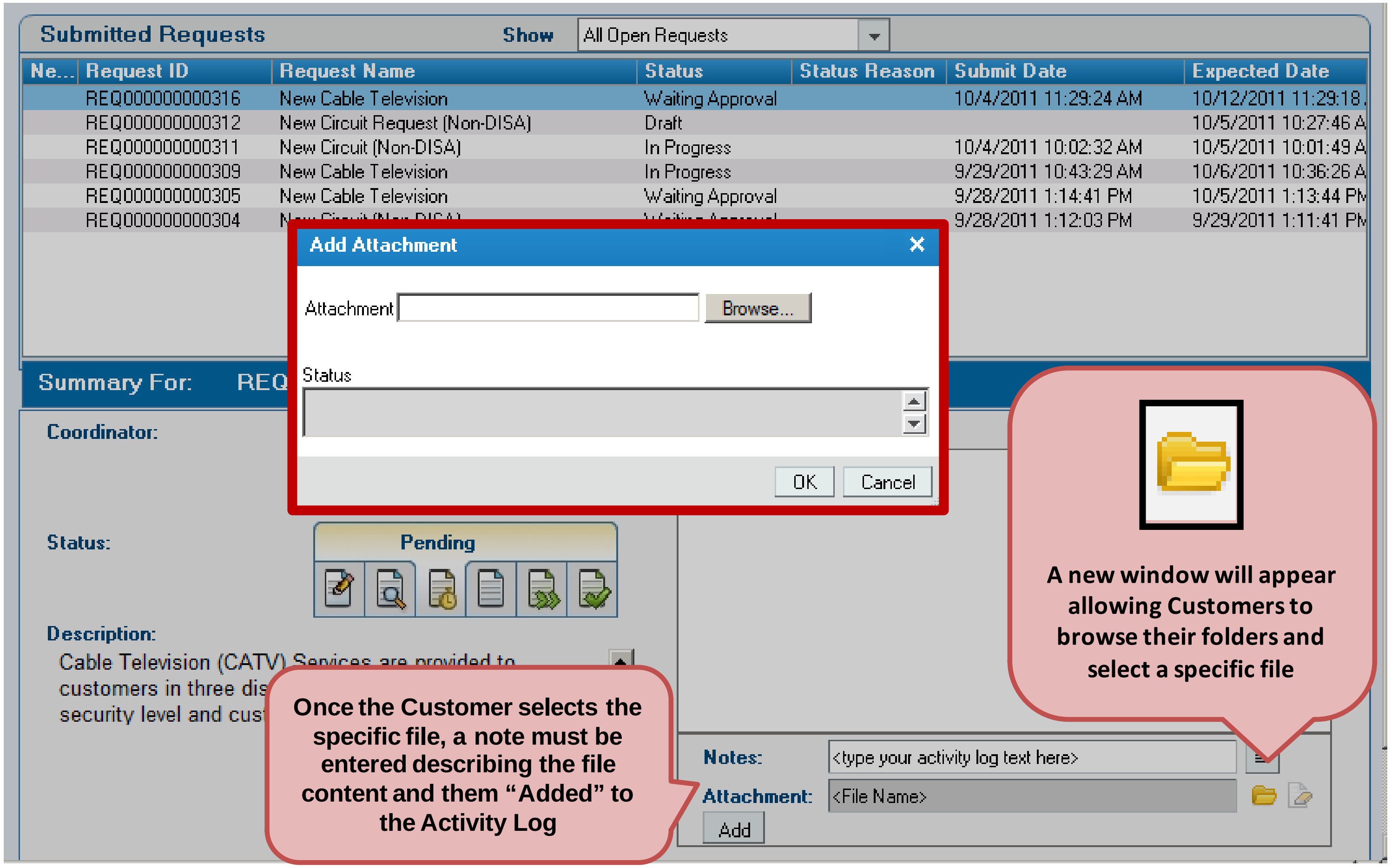
- Once a customer select the Request ID, the request will be highlighted in blue
- Additional information related to the request will be populated in the “Summary For” section in the bottom half of the screen
- Customers will see the “Activity Log” on bottom right-hand side of the screen



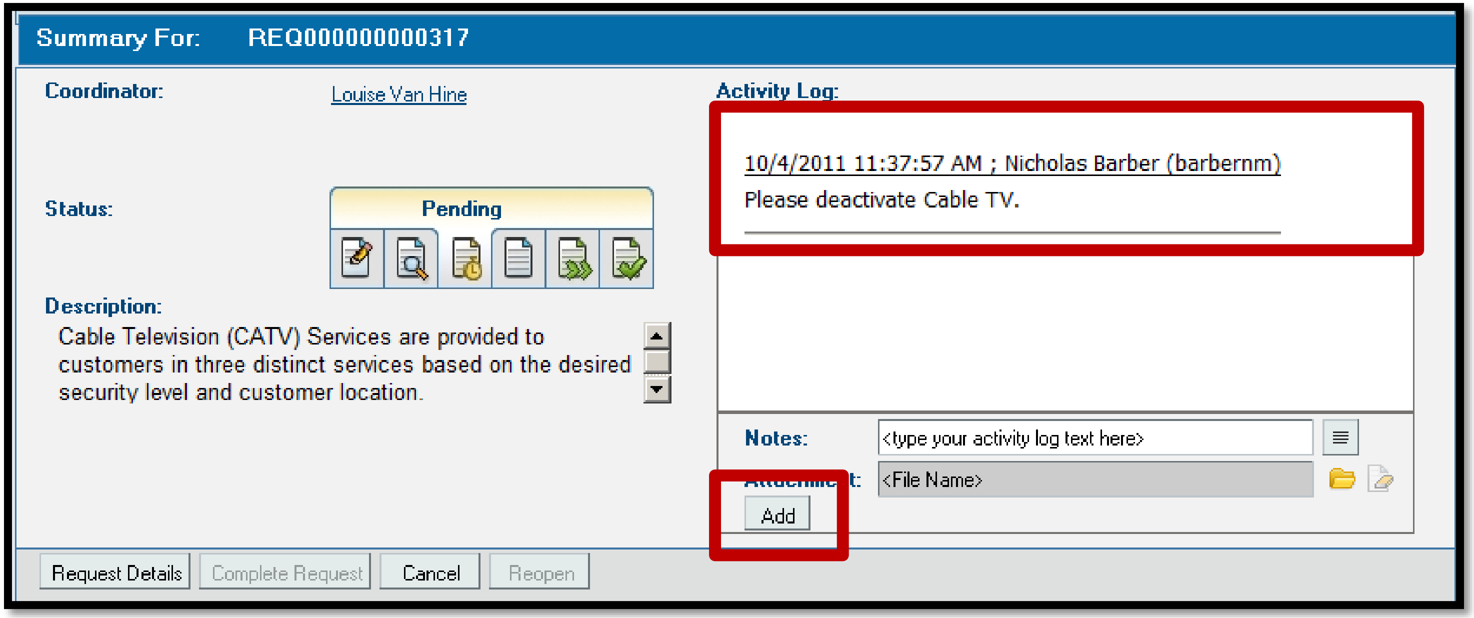
- Once the Customer chooses the request to which they want to add notes and sees the “Summary For” window below, they can add notes to the ticket using the “Activity Log” on the lower right-hand side



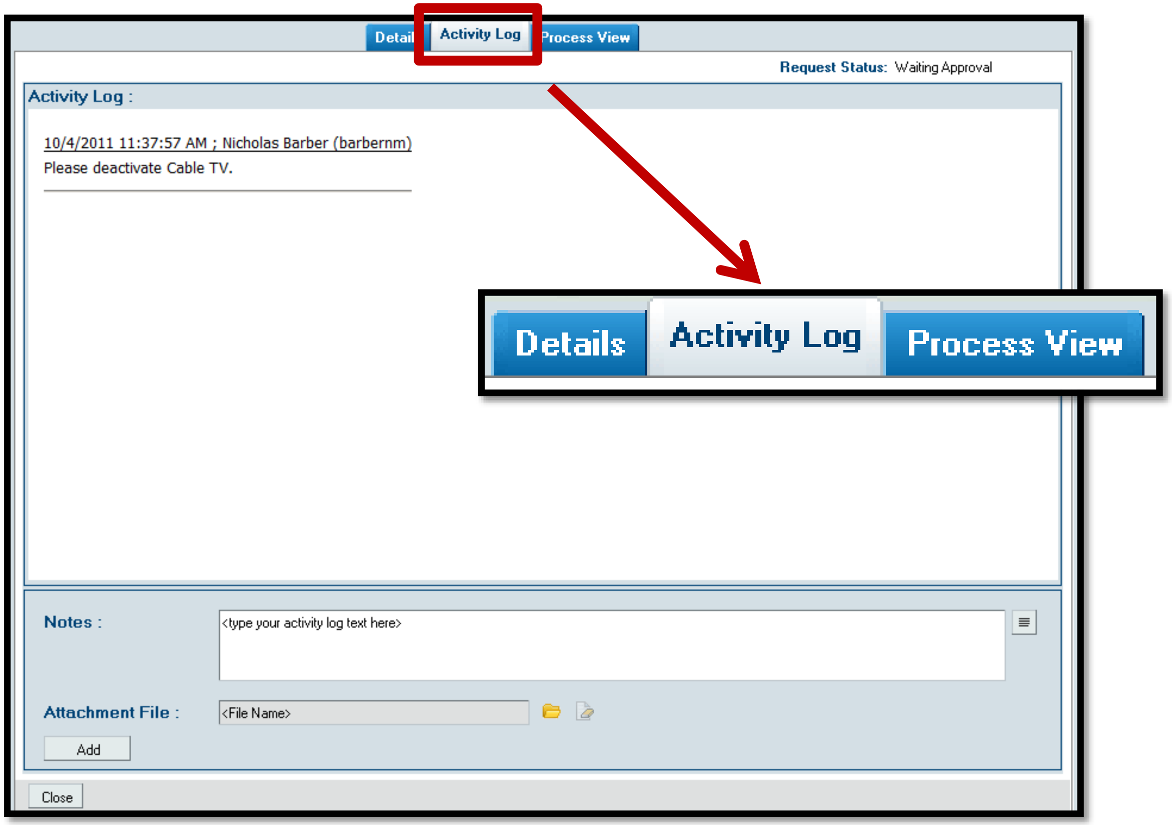
- The Customer can also add additional attachments to the Request through the same "Activity Log" on the lower right-hand side
- Please Note: Customers must include a note describing the content of the attached document



- Once the Customer selects “Ok” in the “Request Entry – Notes” Field, the Customer must select “Add” to add the note to the Request’s Activity Log
- After hitting “Add” the Customer will see their note added to the “Activity Log” with a time stamp and their name



- Once the Customer's note or attachment is added to the "Activity Log" it will be tracked with the request moving forward and will be visible along with the request "Details"
- Customers and ITA personnel will be able to see all notes and attachments by selecting "Activity Log" in the request



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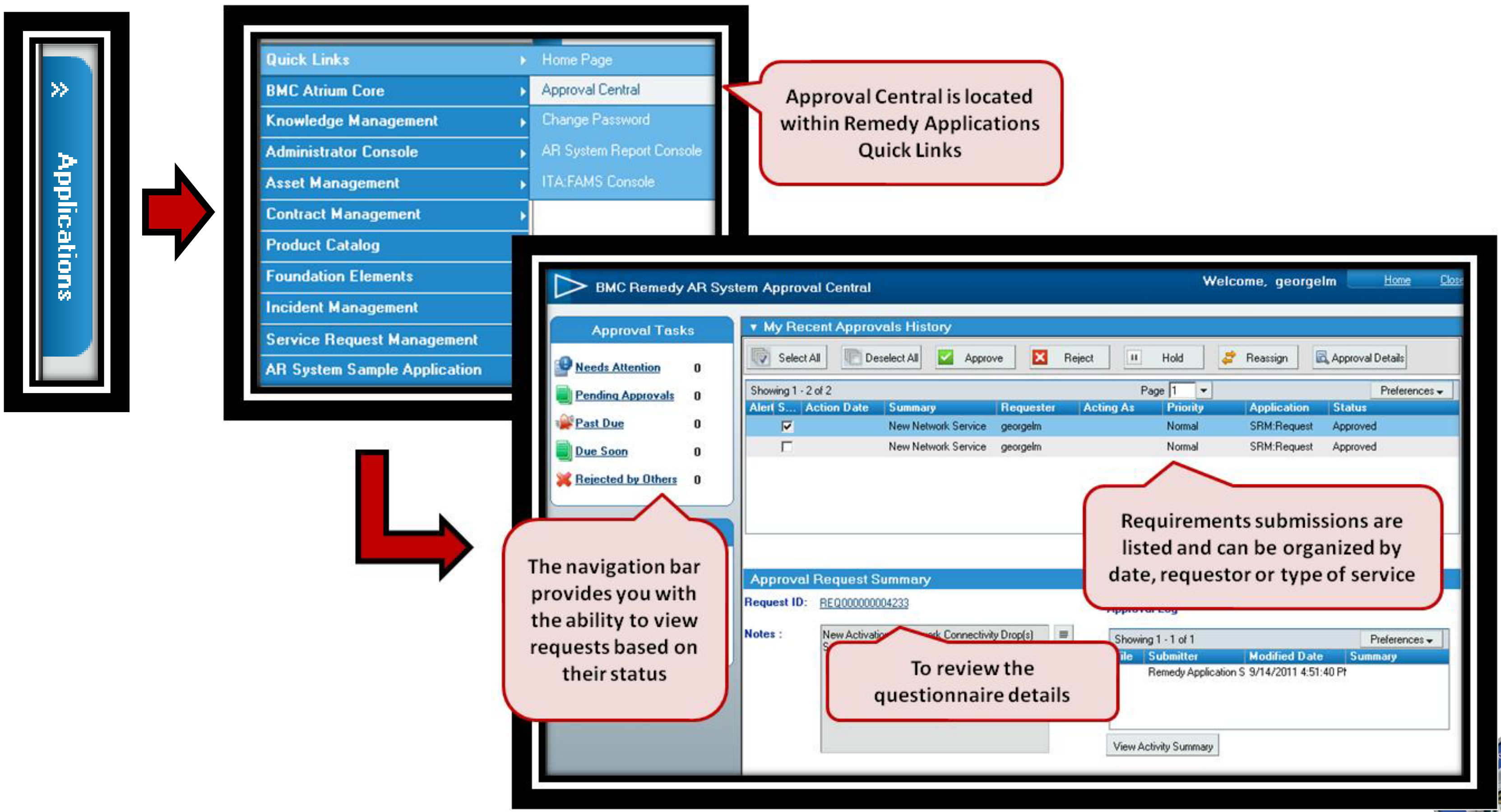
Requirements Approvals

- Once a requirement is submitted, it must be approved within the Approval Central Console in Remedy
- Approvers will receive an email notification regarding new pending requirements
- Once the Customer Agency provides government approval, the requirements are submitted to ITA for review and analysis

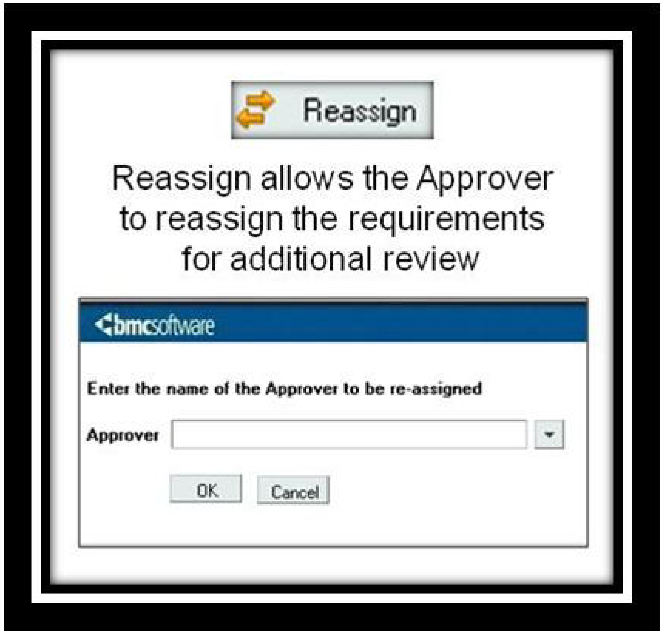
Approval Central Navigation

- Approval Central can be accessed through the Quick Links located within the Applications Tab on the left-hand side the Remedy Overview Console



Approval Central Content

- Approval Central contains all information related to pending approvals, and enables users to see the details of the submission, approve, reject, and even reassign the approval



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Telephone Service Ordering

- Legacy ITA processes allowed Customers to provide ITA with their choice of telephone technology (i.e., ISDN, VoIP, VoSIP, etc).
- In this situation the Customer was providing ITA with a solution rather than a true requirement, and in many cases that solution was unavailable
- Given the continued roll-out of VoIP and VoSIP as well as other service provisioning factors it is in the best interest of the Customer to partner with ITA to determine the technology
- Customers will provide ITA specifics around their need (i.e. classification, location, etc) and ITA will work with the Customers to determine the type of technology each will receive

WITS3 Customers

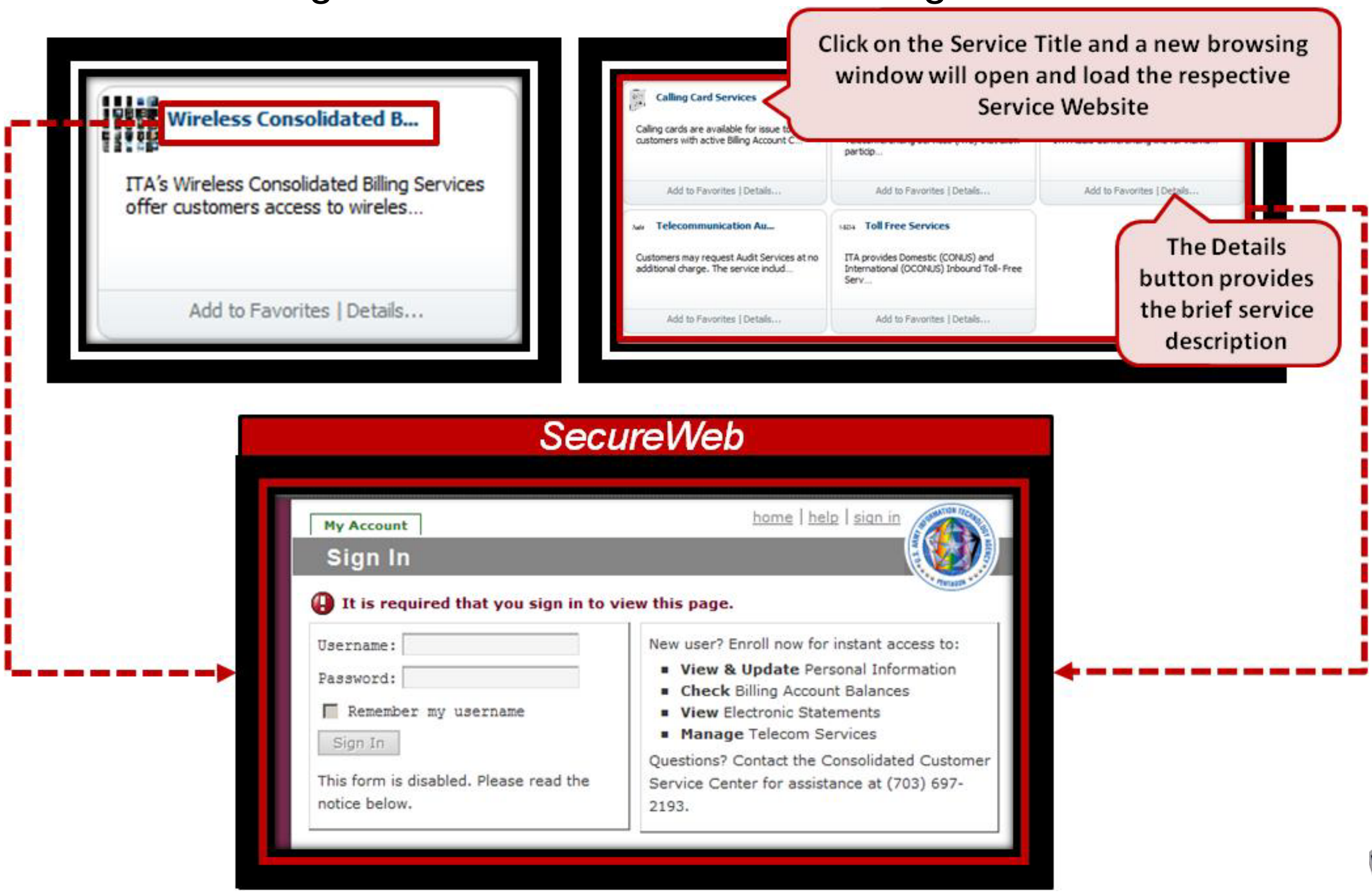
- Customers currently receiving services via the WITS3 Contract may continue to go directly to Verizon Service@Once
- ITA will also provide a link through SRM within the Telecommunications Services Category

External Websites

- Several of the Telecommunications services provided by ITA already make use of external websites for ordering and tracking
  - Wireless Consolidated Billing
  - Telecommunication Audit Service
  - Audio Conferencing
  - Calling Card Services
  - Toll Free Services
- These external websites maintain financial integrations not currently available within SRM, but which are valuable to Customers
- ITA determined that continued use of these sites would be in the best interest of the Customers
- SRM will act as the single site for access to these sites by providing a direct pass-through to HQDA SecureWeb
- Customers with existing accounts will also still be able to go directly to this site for service

External Websites Flow

- Customers will have direct links to SecureWeb through both the Wireless Consolidated Billing and Other Services Sub-categories



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Key Takeaways

- In an effort to provide unparalleled customer service, ITA embarked on an organizational transformation that included the stand-up of an Enterprise ITSM system
- As part of this system, ITA develop the Service Request Module (SRM) to provide Customers with the ability to submit requests through a self-service portal
- Customers and ITA will be able to monitor and track tickets through their lifecycle
- Customers will have access to standard questionnaires guiding their requirements submission
- Customer will have access to support from ITA CRM and ITA CCSC
- Please Note: Current or outstanding service request data will not be migrated into the new ITSM Tool

Contacts and Links

Consolidated Customer Service Center

hqdahelpdesk@conus.army.mil

703.693.4337

ITA Products and Services Catalog

http://ITA.ARMY.MIL

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