NM DEPARTMENT OF INFORMATION TECHNOLOGY



THE NEW INFORMATION TECHNOLOGY SERVICE MANAGEMENT TOOL

	ITIFICATION		
Login Password	Forqot your Password? OK	doit	NEW MEXICO DEPARTMENT OF INFORMATION TECHNOLOGY
Version : 2014.1.	175.0		Date : 10/28/2014 Device : Desktop

# AGENCY REPRESENTATIVE TRAINING TRAINING REFERENCE GUIDE

## **TRAINING CONTENT**

#### Welcome

Identification/Login	
Login	
Home Page	
Navigation	

## SELF SERVICE PORTAL

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Check My Approvals	

## WELCOME TO EASYVISTA - LOGIN

	IFICATION		
Login Password	orgot your Password? OK	doit	NEW MEXICO DEPARTMENT OF INFORMATION TECHNOLOGY
Version : 2014.1.175	.0		Date : 10/28/2014 Device : Desktop

EasyVista	http://easyvista.doit.state.nm.us
My Login	(Your Email Login User Name)
My Password	(Your Email Password)

# Let's get started....

## Home Page - Navigation

- Search
- New •
- •
- My Incident Tickets
- My Request Tickets
- Menus
   My Accounts
  - My Favorites EasyVista Support
- My History
   DOIT News/Announcements

File Edit View Favorites Tools Help	
👍 📴 Suggested Sites 🔻 🙆 Get more Add-ons 🔻	🚹 🔻 🔝 🐨 🖃 🗰 🔻 Page 🛪 Safety 🕶 Tools 🕶 🔞 🛪
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SEARCH DOIT ENTERPRISE HELP DESK PORTAL	
Shopping Cart  Item  Search My Incident Tickets	
NEW     My Request Tickets	
MENUS	
Home My Approvals New Incident My Incidents	
New Service Request My Service Request Need to talk to a person?	DOIT News/Announcement Area
Wy Approvals Call the Enterprise Service Desk at: 505-827-2121 Call SHARE Financials Service Desk at: 505-827-1234 Wy Details	
MY FAVORITES Edge     Send SHARE Financials an Email	
No Favorites	
• MY HISTORY Emety	
22 REQUEST-20141103-0	
22 REQUEST-20141103-0	
2 REQUEST-20141103-0	
22 REQUEST-20141103-0	
0/0	
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## 1. Click on Service Request

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~	My Request Fickets		
	My Approvats		
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## 2. Click on **DolT**

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Home New Incident My Incidents New Service Request My Service Requests My Approvals	SHARE Security SHARE TECH	The Dropping Carl is emply	
Full Text Search My Details	Q Σ· τ	Number of Records 20	

#### 3. Scroll down to *Wireless* to select as the example

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Shopping Cart	Fiter : None	KEARCH		
MENUS	🔎 ASD Financials 🚽	MY SHOPPING CART		
Home New Incident My Incidents	Billing	The Shopping Carl is empty		
New Service Request My Service Requests My Approvals Pull Text Search	🔎 Change Password 🚽			
My Details	Desk Phone	List of DoIT Services		
No Pavorites	Desktop			
2 REQUEST-20141103-0	Email			
INCIDENT-20141103-0     REQUEST-20141103-0	Facilities Data Center			
2 REQUEST-20141103-0	HelpDesk	)		
	Mainframe			

4. Click on the Accessories Shopping Cart



#### 5. Click Create Request



6. Click the Osymbol.

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easyvista		$\backslash$				DolT Test Agency Rep. V	C)
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Hame New Incident My Incidents	Add \ Remove Mobile HotSpot	*	Accessories Quantity : 150				
New Service Request My Service Requests My Approvals Pull Text Search	Add \ Remove Texting	*	Create Report				
My Details	P Billing Change	#					
MY FAVORITES EST	P Change Area Code	CREATE REQUEST	Service Description	Questionnaire Mandatory Answers Quantity Maximum	Quantity		
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REQUEST-20141103-0	New Service				Next Cancel		
	P Reset Voicemail Password						
	Suspend Service						
	P Transfer Cell Phone Number	#					
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	P Warranty Replacement	*					
	Ο Σ·τ		Munder of Records 20				
easyvista							

7. Fill-in all fields and then click Next.

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SEARCH	NEW SERVICE REQUEST > DOIT > WIRELESS	Server Search
Shapping Cart •	Filter : None   View : Service	
Starth	🔑 🔑 Accessories 🛛 👹	SEARCH
- NEW	Add \ Remove Global Voice and Data	
Service Request		MY SHOPPING CART
MENUS	🔑 Add \ Remove Mobile HotSpot 🤎	Accessors Questry 1.00
New Incident My Incidents New Service Request	🔑 Add \ Remove Texting 🤎	Chester Reserve
My Approval My Approval Full Text Search My Debuts	Billing Change     Wreters Number     Accessories	
- MY FAVORITES Edi	P Change Area Code	
· MY HISTORY Emails	P Disconnect Service	lype your accessories
REQUEST-30141103-0	Name Change      Attention for del     Building Suite or     Bu	rery · Stapping advers · City
REGUEST-20141102-0	P New Service * Zy code	
Test Agency Rep.	P Reset Volcemall Password	Next Caricel
MEQUEST-20141103-0	🔎 Suppend Service 👹	
REQUEST 20141103-0	🔑 Upgrades 🗰	
	P Warranty Replacement.	
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#### If you need to edit the previous screen, click , otherwise, click Next to submit f 8. or approval. Test Agency Rep. 🔻 🕵 🕒 easyvista SEARCH NEW SERVICE REQUEST > DOIT > WIRELESS Filter : None View : Se 🔎 Access NEW Add \ Remove Global Voice and Data Add \ Remove Mobile HotSpot Accessories Quantity : 1.00 Add \ Remove Texting Billing Change \* CREATE REQUEST Change Area Code 0 Disconnect Service Name Change New Service Reset Voicemail Password Suspend Service fer Cell Pho Upgrades Σ 4

9. Fill-in the *Recipient* and click *Approval.* 

Self-Service Portal - Open a Request

asyvista			DolT Test Agency Rep. *
SEARCH	ancel / Close • • NEW SERVICE R	EQUEST > DOIT > WIRELESS Service Search	
Shopping Cart •	Filter : None View : Set	ice •	
Search	Accessories	SEARCH	
NEW MENUS	Add \ Remove Global Voice and Data	MY SHOPPING CART	
Home New Incident My Incidents	Add \ Remove Mobile HotSpot	Accessories Quantity : 1.00	
New Service Request My Service Requests My Approvals Full Text Search	Add \ Remove Text CREATE REQUI	ST	*
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	🔑 Change Area Code		
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Test Agency Rep.	Name Change	*	
REQUEST-20141103-0	New Service	*	
BINCIDENT-20141103-0	Reset Voicemail Password	*	
	P Suspend Service	*	
	0		

10. Add a *description* and click *Next.* (Will not allow submission if left blank. If no description, type N/A.)



#### 11. Click Finish.

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P Warranty Replacement 🗰		🔎 Upgrades	*			
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EasyVista Agency Rep Training

November 2014

## **Self-Service Portal - Check Request Status**

1. Click HOME to return to the Home Screen



### 2. Click on My Request Tickets



## Self-Service Portal - Check Request Status

easyvista		DolT Test Agency Rep. 🕈 🙍 🕞
SEARCH	Cancel / Close MY SERVICE REQUESTS Number Search	🔸 🚍
Shopping Cart	Filter : Open View : List V	
Q Search	Number 🗘 Creation Date 🌐 Service Description 🌐 Status 🧊 Delivery Date 🌐	
NEW	AEQUEST-20141103-00001 11/3/2014 10:01:58 am Development In progress 11/10/2014 10:01:58 am	
	REQUEST-20141103-00000 11/3/2014 10:17:01 am Add \ Remove Global Voice and Data in progress 11/10/2014 10:17:01 am	
MENUS	REQUEST-20141103-00004 11/3/2014 10:17:06 am Add \ Remove Mobile Hol5pot In progress 11/10/2014 10:17:06 am	
Home New Incident	P REQUEST-20141103-00009 11/J2/2014 3:42:07 pm Accessories In progress 11/10/2014 3:42:07 pm	
My incidents	P REQUEST-20141103-00010 11/3/2014 3:47:07 pm Accessories In progress 11/10/2014 3:47:07 pm	
My Service Request	P. REQUEST-20141104-00007 11/4/2014 3:18:14 pm Accessories In progress 11/11/2014 3:18:14 pm	
My Approvals Full Text Search	P REQUEST 20141154 00000 11/4/2014 3/36/32 pm Accessories In progress 11/11/2014 3/36/32 pm	
My Details	Σ - G = 0 • Number of Records 20 • •	
No Favorites  MY HISTORY Emph REQUEST-20141103-0		
NCIDENT-20141103-0		
Test Agency Rep.		
REQUEST-20141103-0		
REQUEST-20141103-0		
INCIDENT-20141103-0		
NEW READEST 20141103-0		

4. Status screen is revealed. Click (2) to return to previous page or click Home. DO NOT click the Back key. The program may shut down.

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easyvista	DolT Test Agency Rep. 🔻 🗕 🕞
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Requesting Person Test Agency Rep.     Represt Test User     Service Descripton Service Request/DoIT/Application/Development	
MENUS Attachments (0)	
Home New Incident Work Order Assigned To Action Action Time OLA Target Late	
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My Approxis Full Text Search 1 Day(5) ago Text Agency Rep. Creation Wy Details	
Number of Records 5           Number of Records 5	
No Favorites	
• MY HISTORY Emoty	
▲ REQUEST-201411050	
Test Agency Rep.	
22 REQUEST-20141103-0	
2 REQUEST-20141103-0	
Image: MicroBettra10441030           Image: Recuestra10441030	
EasyVista Agency Rep Training 11	November

## Self-Service Portal - Open an Incident

1. At the Home Screen, Click on New Incident

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easyvista			DelT Test Ap	ency Rep. • 🧕 🕒
SEARCH	DOIT ENTERPRISE HELP DESK PORTAL			
Shopping Cart • Item •	My finident Tickets			
- NEW C	My Request Tickets			
MENUS Hone New Incident My Incidents	My Approvals			
New Service Request My Service Requests My Approvals Full Text Search	Need to talk to a person? Coll the Enterprise Service Desk at: 505-827-2121 Call SHARE Financials Service Desk at: 505-827-1234			
My Details	Send Enterprise Support an Email			
MY FAVORITES Ed	( Send SHARE Financials an Email			
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• MY HISTORY Enter				
REQUEST-20141103-0				
NCIDENT-20141103-0				
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REQUEST-20141103-0				
REQUEST-20141103-0				
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easyvista				

## 2. Fill-in all fields and Click Submit.

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SEARCH	V INCIDENT-20141112-00003			=
Shopping Cart Y	Recipient - Test Agency Rep. Current Time 11/12	/2014 11:04:14 am		
Search	Phone - Catalog -			
• NEW	* Urgency 2 - Medium DoIT DoIT			
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Home Here tocolers My housers Here Service Requests My Service Requests My Advorrations Hard Search My Details Exercised My Hardwork Exercised My Advorrations My Advorrations My Advorrations My Hardwork Exercised My	Carcel Submit	Add Catalog Item		
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## **Self-Service Portal - Open an Incident**

3. The confirmation screen will appear with the Incident Number. You may also access the incident by clicking on the *Click Here* link and well as the *Click Here* link to create another Record with the same Data.



4. To return to the Home Screen, Click *Home*.

easyvista		DelT	Test Agency Rep. • 🧕 🕞
SEARCH	Your aquest has been Sent successfully.		
	The Call bar seen generated with Number INCIDENT-20141105-00010.		
Shopping Cart •	To access it. click here.		
tem •	in second second		
Search	To create another Record with the same Data, <u>citcl.http</u> .		
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MENUS			
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REQUEST-20141103-0			
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22 REQUEST-20141103-0			
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04			

## **Self-Service Portal - Check an Incident**

1. At the Home Screen, Click on My Incidents



2. The My Incidents status screen appears. Click on the  $\mathcal{P}$  icon to display the status.

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## **Self-Service Portal - Check an Incident**

3. Status screen is revealed. Click ( ) to return to previous page or click *Home*. DO NOT click the Back key. The program will shut down.

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SEARCH Update Incident Record • VINCIDENT-20141103-00010 🕁 Incident Number •	=
Shopping Cart	ticles (0)   Related Known Errors (0)   Solution   Questions/Responses (0)
Search     Indert Humber INCIDENT-20441103-00010 State V Ta progress     Italia V Ta progress     Italia V Table V am     Priority 3     Priority 3	
MENUS Requesting Person V 👔 Test Agency Rep. Recipient V 🗿 Test User	
Home Service N/A Equipment V/A	
My incidents Attachments.000 New Service Request Mark Protect Assigned To Action Action Time (PLA Transmit	
My Service Requests DolT EnterpriseSupportSesk (1) Analysis and Resolution	
Full Text Search         2 Day(s) ago         DoiT EnterpriseSupportSesk (1) @ Send Email.            My Details         2 Day(s) ago         Image: Send Email. Notify Requestor	
• MY FAVORITES For	
No Pavorites V E - Number of Re	sonds 5 🗸
MY HISTORY Empty	
INCIDENT-20141105-0	
Test Agency Rep.	
REQUEST.20141103.0	
2 REGUEST-20141103-0	
INCIDENT.20141103.0	
KEQUEST-20141103-0	
easyvista	

4. Other options available:

#### Allows you to update your description

easyvista		DoIT Test Agency Rep. 🕈 🔟 🕞
SEARCH	Vodate Incident Record VIIIOENT-20141103-00010 🖫 Incident Number 🔻 🔍 Search	Ξ
Shopping Cart V Item V Q Search	DETAILS   Related Incidents (0)   Related Problems (0)   Related Services (0)   Related Changes (0)   Attachments (0)   News Articles (0)   Related Known Errors (0)   Solution   Questions/Responses (0) Incident Number INCIDENT-20141103-00010 Status V In progress Status V In progress	
• NEW	* Category DoIT Description User is experiencing printer problems	
MENUS	Requesting Person 👻 📕 Test Agency Rep. Recipient 👻 🗾 Test User	
Home New Incident My Incidents	Service N/A Equipment V/A Attachments (0)	
New Service Request	Work Order Assigned To Action Action Time OLA Target Late	
My Service Requests My Approvals	DolT EnterpriseSupportDesk (1) Analysis and Resolution	
Full Text Search	2 Day(s) ago DoT EnterpriseSupportDesk (1)	
My Details	2 Dary(s) ago 💮 Send Emaît: Notify Requestor	
MY FAVORITES Edit		
No Favorites	β ΣNumber of Records 5	
Refresh L	Total of Incidents Icon	

## **Self-Service Portal - Check Approvals**

1. At the Home Screen, Click on *My Approvals*.



2. The approval status screen appears. Click on the  $\mathcal{P}$  icon to display the status.

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SEARCH	Approval • • MY APPROVALS	arch	* ヨ
Shopping Cart	Filter : To Do View : List		
Item 🔻			
् Search	Creation Date     Type     DODDAT-20141101-00009     11/1/2014 10-12-24 am	Test Asency Rec. Du/T	
• NEW	Ο Σ-60	Number of Records 20	
MENUS			
Home			
New Incident			
My Incidents			
New Service Request			
My Service Requests			
My Approvals			
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## **Self-Service Portal - Check Approvals**



## NOTES

## NOTES



Simms Building 715 Alta Vista Santa Fe, New Mexico 87505 Phone: 505.827.2121 www.doit.state.nm.us

EasyVista Agency Rep Training

November