



DESCARTES User Guide

Descartes Customer Service Portal

Version 1.10 July 2015

Table of Contents

ABOUT DESCARTES SERVICE DESK	4
CONTACTING DESCARTES SERVICE DESK	5
Descartes Customer Service Portal	5
<i>Access to the Portal</i>	5
WHAT TO KNOW BEFORE YOU CONTACT THE SERVICE DESK	7
GUIDELINES TO USING THE PORTAL	8
Navigation of Customer Portal Home Page	9
SEARCH Assignment Block (1)	10
Service Request ID: The incident ID (Ticket #)	11
TFS ID	12
Posting Date (Time Frame)	12
Description	13
Posting Date	13
Priority	14
Urgency	14
User Status ID	15
Impact	15
Transaction Type	16
My Saved Searches Assignment Block (2)	17
Creating Personal Saved Searches	19
Exporting Search Results	20
Personalization	21
Web Links Assignment Block (3)	23
Create Assignment Block (4)	23
Additional Fields	26
Other Home Page Functions	27
Updating an Existing Incident	28
Printing the Content of Service Incidents	30
Email Transactions	31
Questions & Remarks	32
ALTERNATIVE METHODS OF CONTACTING THE SERVICE DESK	33
<i>Email:</i>	33
<i>Telephone:</i>	33
FREQUENTLY ASKED QUESTIONS	34
PORTAL	34
EMAIL	36
TELEPHONE	36

APPENDIX A 37

APPENDIX B 38

ABOUT DESCARTES SERVICE DESK

At Descartes, our customer's satisfaction is our primary measure of success. Descartes' Service Desk and Expertise Centres are critical components to ensuring our customers' needs are met.

To achieve the highest level of satisfaction, we strive daily to give our customers prompt and accurate responses, delivered in a friendly and courteous manner, while also identifying how they may improve their business practices through additional training and Descartes services.

We help our customers to achieve:

- Network availability
- Stability with new technology
- Operational efficiency
- Service continuity

Every customer inquiry is professionally tracked from the time contact is initiated until a resolution is reached. Based on the priority of a case, Descartes' Expertise Centres escalate customer issues within our organization to ensure mission-critical problems receive a quick resolution.

CONTACTING DESCARTES SERVICE DESK

Descartes Customer Service Portal

The *Descartes Service Desk Portal*, driven by SAP, is the first stop for all customers seeking answers to their questions about Descartes products and services. From this single point, 24 hours a day, 7 days a week, customers may open a new ticket and check on the status of an existing ticket. Tickets opened via the Portal will be answered by the appropriate Expertise Centre in accordance with the SLA for the product referenced.

Additionally, customers seeking a Do-It-Yourself solution may also turn to the Portal. Common reference guides and Frequently Asked Questions pages will be hosted within the Portal for those times when a user is seeking a quick answer to a problem.

Access to the Portal

Access to the portal is gained through the following URL address:

<https://servicedesk.descartes.com>

If the customer has previously contacted the Service Desk they may have already been set up to access the portal using the following login credentials:

If a new user ID is required or the customer experiences difficulties they should send an email to the service desk (servicedesk@descartes.com).

DESCARTES™
Network. Applications.
Community.

DESCARTES™
Evolution 2015
Global User & Partner Conference
May 19-21 | Miami, Florida

User: *

Password: *

[Change Password](#)

Uniting the People
and Technology
that Move the World

Copyright © 2015 SAP AG. All rights reserved.

User: This is your email address

Password: Welcome1
(This is a case sensitive password
which you will be prompted to change
when you first login)

If the customer wishes to change his/her password, they should enter their "User" and "Password" then select the "Change Password" hyperlink.

DESCARTES™
Network. Applications.
Community.

DESCARTES™
Evolution 2015
Global User & Partner Conference
May 19-21 | Miami, Florida

User: BFLOUJEH@DESCARTES.COM

Current Password: *

New Password: *

Repeat Password: *

Uniting the People
and Technology
that Move the World

Copyright © 2015 SAP AG. All rights reserved.

To change password the user must enter "User" and current "Password" then select "Change Password". The user will then be prompted to re-enter "Current Password" then enter a "New Password" and "Repeat Password".

Please note the password must not exceed 8 characters or include any special characters. The password can only be changed once a day.

If the user forgot their password an email will need to be sent to Servicedesk@descartes.com

WHAT TO KNOW BEFORE YOU CONTACT THE SERVICE DESK

To make a timely and complete diagnosis and resolution, customers should come armed with some key pieces of information when they contact the Service Desk. This information will ensure that the customer's question is delivered to the appropriate Expertise Centre and will help the Service Desk Representative provide the correct solution.

- What is your contact information?
- What Descartes product are you using (including its version, if possible)?
- What URL, user name and password are you using if logging onto a Descartes hosted site?
- What is the exact nature of the problem?
- Is it repeatable or random?
- What is the relevant reference data (House Bill, Master Bill, Vessel, and Voyage Number) associated with the problem?
- What is the exact wording of the error message?
- What steps are taken to encounter the problem?
- What steps have been taken already to resolve the problem?
- What other information may be helpful? Have any changes been made to your environment (system maintenance, new software, software or OS upgrades)?
- Wherever possible save error messages and screenshots to a file or document and email them to us.

GUIDELINES TO USING THE PORTAL

The services available to the customer through the portal include:

- Creation of New Service Requests
- Attachment of Documents
- Search/view/amend/print Existing Service Requests
- Knowledge Base & FAQs (coming soon)
- Ability to export incidents and searches into MS Excel

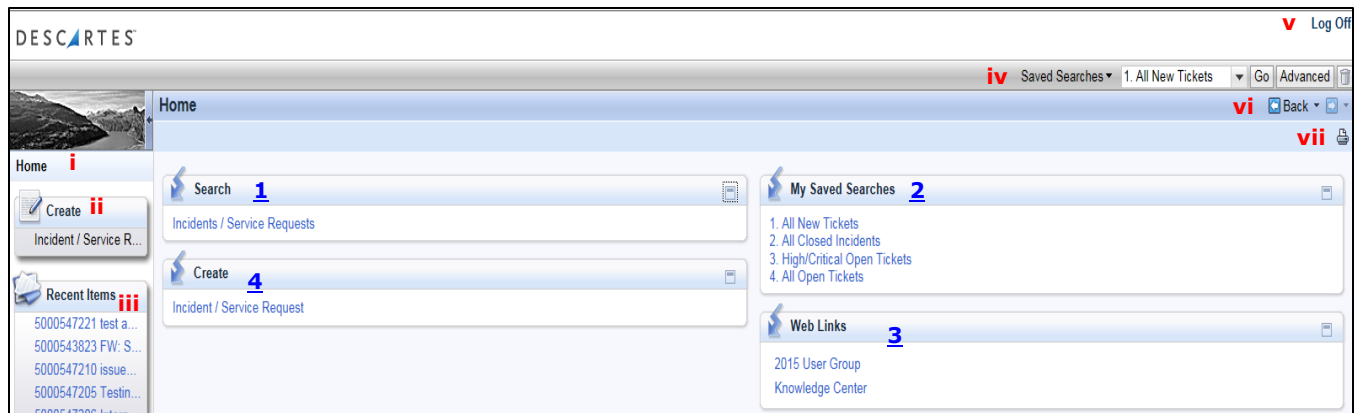
Service Requests (Incidents) are events which are not part of the standard operation of a service and which cause, or may cause, an interruption to, or a reduction in, the quality of that service.

Service requests may also be used for requesting new enhancements.

By Default, you can only see Service Requests which are created by yourself.

There is an availability to see all tickets, also those from your colleagues. The Service Manager can provide us the names of those which may have access to everyones tickets by launching a support ticket.

Navigation of Customer Portal Home Page



The “**Home**” screen is broken into four assignment blocks (1-4 as per diagram).

- 1. Search assignment block:** allows free field incident searches
 - a. Incidents / Service Requests
- 2. My Saved Searches assignment block:** predefined incident searches
 - a. All New Incidents
 - b. All Closed Incidents
 - c. High/Critical Open Incidents
 - d. All Open Incidents
- 3. Web Links assignment block:** Useful external URL's
 - a. 2015 User Group
 - b. Knowledge Centre
- 4. Create assignment block:** allows creation of new incidents
 - a. Incident / Service Request

Other options on the “**Home**” screen are listed below (i-vii as per diagram).

- I. **Home Button:** Redirects the user to the Home screen
- II. **Create Button:** Allows creation of new incidents
- III. **Recent Items:** Shows a list of recent items selected
- IV. **Saved Searches:** Shows a list of predefined incident searches
- V. **Log Off:** Logs the user off the Customer Portal
- VI. **Back Button:** Takes the user to the previous page within the application
- VII. **Print Button:** Opens a new window which will allow the user to print the screen

SEARCH Assignment Block (1)

Search: Service Requests
Archive Search

Search Criteria

Service Request ID	is		+	-
TFS ID	is		+	-
Posting Date (Time Frame)	is		+	-
Description	is		+	-

Maximum Number of Results: 100

Search Clear Save Search As: Save

In the Search assignment block the user has the ability to search incidents based on or using a combination of the following search criteria:

- i. **Service Request ID:** The incident ID (Ticket #)
- ii. **TFS ID:** Development ticket number
- iii. **Posting Date (Time Frame):** Predefined time frames (incident creation start date)
- iv. **Description:** Problem description of an incident
- v. **Posting Date:** The actual date of an incident creation
- vi. **Priority:** The priority that is assigned to an incident
- vii. **Urgency:** Urgency that is assigned to an incident
- viii. **User Status ID:** The status of an incident within the incident life cycle
- ix. **Impact:** The impact of an incident
- x. **Transaction Type:** The type of the incident

Please note that you can increase or decrease the number of search lines by utilizing the + or - on the right hand side as shown above outlined in red.

Service Request ID: The incident ID (Ticket #)

This is a straight forward search if the user has the incident number. For example, if the user is looking for incident # 5000547210. The user will select "Service Request ID" then type the incident number in the search field as shown below and press the "**Search**" button.

Search: Service Requests

Archive Search

Search Criteria

Service Request ID	is	5000547210	+ -
Priority	is		+ -
Urgency	is		+ -
Impact	is		+ -

Maximum Number of Results: 100

Search **Clear** Save Search As: **Save**

HINT: You can use * for wild card searches. For example you could search *547210.

The user will get the incident result as shown below. To view the details of the incident the user must click on the Transaction ID hyperlink. The user has the ability to see at a high level the following fields associated with that incident:

New	New from Template	Create Follow-Up										
Priority	Transaction ID	Update	TFS ID	Customer	Contact Person	Description	Incident Start	Changed At	User Status	Category	Object/Product (...)	Transaction Type
High	5000547210			Descartes Intern...	Anne-Laure Decr...	issue with printer	08.01.2015 12:00...	08.01.2015 12:02...	New			DSG Incident

- i. Priority:
- ii. Transaction ID:
- iii. Update:
- iv. TFS ID:
- v. Customer:
- vi. Contact Person:
- vii. Description:
- viii. Incident Start:
- ix. Changed At:
- x. User Status:
- xi. Category:
- xii. Object Product (Reference Object):
- xiii. Transaction Type:

TFS ID

This is a straight forward search if the user has the TFS ID. TFS is Descartes's Development tracking tool, where bugs and enhancement requests are logged. For example, if the user is looking for TFS ID # 236074. The user will select "TFS ID" then type the TFS number in the search field as shown below and press the **"Search"** button.

Search Criteria

TFS ID	is	236074	+	-
Priority	is		+	-
Urgency	is		+	-
Impact	is		+	-

Maximum Number of Results: 100

Search

Clear

Save Search As: 2. All Closed Incidents

Save

Result List: 1 Service Request Found

Posting Date (Time Frame)

Search Criteria

Posting Date (Time Frame)	is		+	-
Priority	is		+	-
Urgency	is		+	-
Impact	is		+	-

Maximum Number of Results: 100

Search

Clear

Save Search As: 2. All Closed Incidents

Save

This search allows the user to search all incidents that were created within the predefined Time Frame. For example, if the user selects the "Last Week" search and selects the "Search" button, the function will return all incidents that were created within the last seven days.

Description

The screenshot shows the 'Search Criteria' form. The 'Description' field is selected, and the dropdown menu is open, showing options: 'is', 'contains', 'starts with', and 'is empty'. The 'Test' value is entered in the adjacent text box. Below the dropdowns, there are buttons for 'Search' and 'Clear'. To the right, there is a 'Maximum Number of Results' field set to '100' and a 'Save Search As' field with the value '2. All Closed Incidents' and a 'Save' button.

This search allows the user to search by incident "Description" with certain parameters such as "contains", "starts with", or "is empty". For example, if the user selects "Description", selects parameter "contains" and types "Test" and then selects the search button, the system would return all incidents that contained the word "Test" in the Description field.

Posting Date

The screenshot shows the 'Search Criteria' form. The 'Posting Date' field is selected, and the dropdown menu is open, showing options: 'is', 'is earlier than', 'is on or earlier than', 'is on or later than', and 'is later than'. A calendar widget is displayed on the right, showing the month of January 2015. Below the dropdowns, there are buttons for 'Search' and 'Clear'. To the right, there is a 'Maximum Number of Results' field and a 'Save Search As' field.

This date search allows for specific date, or date ranges to be selected by the user. The user will select "**Posting Date**" followed by a parameter such as "**is**" then enter a date or click on the box to activate a calendar. Once the date is selected or inputted the user will select search and will receive the results of the search criteria.

Priority

The screenshot shows a 'Search Criteria' form with four rows of search criteria. The first row, 'Priority', has a dropdown menu open showing four options: 'Very high', 'High', 'Medium', and 'Low'. The other three rows are 'TFS ID', 'Posting Date (Time Frame)', and 'Description', each with a dropdown set to 'is'. To the right of each row are plus and minus icons. At the bottom right, there is a 'Maximum Number of Results' field set to '100'. At the bottom left are 'Search' and 'Clear' buttons. At the bottom center is a 'Save Search As:' text box. At the bottom right is a 'Save' button with a floppy disk icon.

Search Criteria			
Priority	▼	is	▼
TFS ID	▼	is	▼
Posting Date (Time Frame)	▼	is	▼
Description	▼	is	▼

Maximum Number of Results: 100

Search Clear Save Search As: Save

The user has the ability to search all incidents by "**Priority**" assigned to the incident. For example, if the user wanted to search all incidents that were set to "**Very High**" then they would select the very high value and select the "Search" button. For a definition of Priorities please refer to [Appendix B](#).

Urgency

The screenshot shows a 'Search Criteria' form with four rows of search criteria. The first row, 'Urgency', has a dropdown menu open showing four options: 'Critical', 'High', 'Medium', and 'Low'. The other three rows are 'TFS ID', 'Posting Date (Time Frame)', and 'Description', each with a dropdown set to 'is'. To the right of each row are plus and minus icons. At the bottom right, there is a 'Maximum Number of Results' field set to '100'. At the bottom left are 'Search' and 'Clear' buttons. At the bottom center is a 'Save Search As:' text box. At the bottom right is a 'Save' button with a floppy disk icon.

Search Criteria			
Urgency	▼	is	▼
TFS ID	▼	is	▼
Posting Date (Time Frame)	▼	is	▼
Description	▼	is	▼

Maximum Number of Results: 100

Search Clear Save Search As: Save

The user has the ability to search all incidents by "**Urgency**" assigned to the incident. For example, if the user wanted to search all incidents that were set to "**Critical**" then they would select the critical value and select the "Search" button. For a definition of Urgencies please refer to [Appendix B](#).

User Status ID

Search Criteria			
User Status ID	▼	is	▼
TFS ID	▼	is	▼
Posting Date (Time Frame)	▼	is	▼
Description	▼	is	▼
		Max	▼
		<div> <div>First Call Resolution</div> <div>Forwarded to Prod. Dev.</div> <div>In Process</div> <div>New</div> <div>Pending 3rd Party</div> <div>Pending Change Request</div> <div>Pending Customer Action</div> </div>	
<input type="button" value="Search"/> <input type="button" value="Clear"/>		Save Search As: <input type="text"/> <input type="button" value="Save"/>	

This search allows the user to search incidents by incident status. For a definition of incident statuses please refer to [Appendix A](#). The user selects “**User Status ID**” and the status of incident they are looking for such as “**New**” and selects the Search button.

Impact

The user has the ability to search all incidents by “**Impact**” assigned to the incident. For example, if the user wanted to search all incidents that were set to “**Extensive-All Users**” then they would select that value and select the “Search” button. For a definition of Impacts please refer to [Appendix B](#).

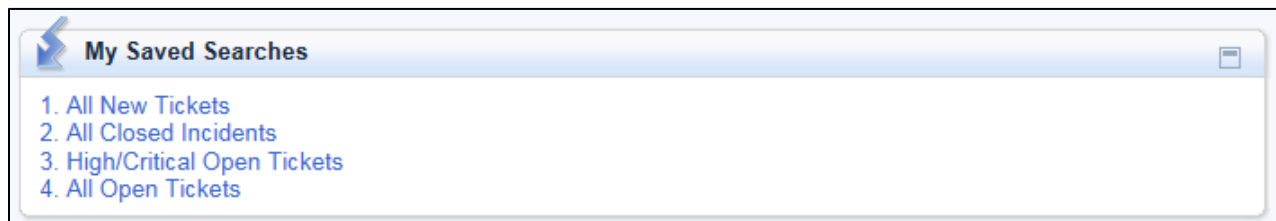
Search Criteria			
Impact	▼	is	▼
TFS ID	▼	is	▼
Posting Date (Time Frame)	▼	is	▼
Description	▼	is	▼
		<div> <div>Extensive - All Users</div> <div>Moderate - Few Users</div> <div>Minor - One User</div> <div>None</div> </div>	
		Maximum Number of Results: <input type="text" value="100"/>	
<input type="button" value="Search"/> <input type="button" value="Clear"/>		Save Search As: <input type="text"/> <input type="button" value="Save"/>	

Transaction Type

Search Criteria							
Transaction Type	▼	is	▼	▼	⊕	⊖	
TFS ID	▼	is	▼	DSG Incident	⊕	⊖	
Posting Date (Time Frame)	▼	is	▼		⊕	⊖	
Description	▼	is	▼		⊕	⊖	
Maximum Number of Results:					100		
Search		Clear		Save Search As:			Save

This search will allow the user to search incidents by type. Currently there are only DSG Incidents but in the future other incident types will be available for searching.

My Saved Searches Assignment Block (2)



The user will have access to four convenient predefined searches at the click of a button.

1. All New Tickets

This predefined search returns all incidents in "User Status ID": "Assignment" and "New." For a definition of incident statuses please refer to [Appendix A](#).

Search Criteria					
User Status ID	is	Assignment	+	-	
User Status ID	is	New	+	-	
			Maximum Number of Results: 100		
Search		Clear		Save Search As: 1. All New Tickets	
				Save	

2. All Closed Incidents

This predefined search returns all incidents in "User Status ID": "Closed-No Feedback", "Closed-Unresolved", and "First Call Resolution", and "Closed and Resolved." For a definition of incident statuses please refer to [Appendix A](#).

Search Criteria					
▼ User Status ID	is	4 lines in group	+	-	
User Status ID	is	Closed - No Feedback	+	-	
User Status ID	is	Closed - Unresolved	+	-	
User Status ID	is	First Call Resolution	+	-	
User Status ID	is	Closed and Resolved	+	-	
			Maximum Number of Results: 1,000		
Search		Clear		Save Search As: 2. All Closed Incidents	
				Save	

3. High/Critical Open Tickets

This predefined search returns all incidents in "User Status ID": "Assignment", "Forward", "First Call Resolution", "Solution and Planning", "Solution Provided", "Pending Customer Closure", "Pending Customer Action", "Pending Change Request", and "Pending 3rd Party". The search also defines Priorities of: "Very High" and "High." For a definition of incident statuses please refer to [Appendix A](#). For a definition of Priorities please refer to [Appendix B](#).

Search Criteria				
▼ User Status ID	▼ is	▼ 10 lines in group	⊕ ⊖	
User Status ID	▼ is	▼ Assignment	⊕ ⊖	
User Status ID	▼ is	▼ Forwarded to Prod. D	⊕ ⊖	
User Status ID	▼ is	▼ Solution and Planning	⊕ ⊖	
User Status ID	▼ is	▼ Solution Provided	⊕ ⊖	
User Status ID	▼ is	▼ Pending Customer Cl	⊕ ⊖	
User Status ID	▼ is	▼ Pending Customer Ac	⊕ ⊖	
User Status ID	▼ is	▼ Pending Change Req	⊕ ⊖	
User Status ID	▼ is	▼ Pending 3rd Party	⊕ ⊖	
User Status ID	▼ is	▼ New	⊕ ⊖	
User Status ID	▼ is	▼ In Process	⊕ ⊖	
Priority	▼ is	▼ Very high	⊕ ⊖	
Priority	▼ is	▼ High	⊕ ⊖	

4. All Open Tickets

This predefined search returns all incidents in "User Status ID": "Assignment", "Forward", "First Call Resolution", "Solution and Planning", "Solution Provided", "Pending Customer Closure", "Pending Customer Action", "Pending Change Request", "Pending 3rd Party", "New", and "In Process". For a definition of incident statuses please refer to [Appendix A](#).

Search Criteria				
▼ User Status ID	▼ is	▼ 10 lines in group	⊕	
User Status ID	▼ is	▼ Assignment	⊕ ⊖	
User Status ID	▼ is	▼ Forwarded to Prod. D	⊕ ⊖	
User Status ID	▼ is	▼ Solution and Planning	⊕ ⊖	
User Status ID	▼ is	▼ Solution Provided	⊕ ⊖	
User Status ID	▼ is	▼ Pending Customer Cl	⊕ ⊖	
User Status ID	▼ is	▼ Pending Customer Ac	⊕ ⊖	
User Status ID	▼ is	▼ Pending Change Req	⊕ ⊖	
User Status ID	▼ is	▼ Pending 3rd Party	⊕ ⊖	
User Status ID	▼ is	▼ New	⊕ ⊖	
User Status ID	▼ is	▼ In Process	⊕ ⊖	

Creating Personal Saved Searches

The user will also have to ability to create their own Personal searches and save them for their convenience. For example, the user wanted to create a search that will pull all incidents that are in status "Pending Customer Action"

From the search screen the user would do the following:

The screenshot shows the 'Search Criteria' form with the following fields and values:

- User Status ID: Pending Customer Action
- Operator: is
- TFS ID: (empty)
- Posting Date (Time Frame): (empty)
- Description: (empty)
- Maximum Number of Results: 100
- Buttons: Search, Clear, Save Search As, Save

Red dashed boxes highlight the 'Maximum Number of Results' field and the 'Save Search As' field.

1. Select User Status ID is "**Pending Customer Action**"
2. The user can use the **(-)** to remove the other search fields
3. The user should change the **Maximum Number of Results** to >100 if they believe the results will return more than 100 incidents.
4. The user must name their search in the Save Search As field and press Save
5. The user's personal search will now appear both on the drop down as well My Saved Searches assignment block.

The screenshot shows the 'Search Criteria' form with the following fields and values:

- User Status ID: Pending Customer Action
- Operator: is
- Maximum Number of Results: 250
- Save Search As: Pending My Actions
- Buttons: Search, Clear, Save

Red dashed boxes highlight the 'Maximum Number of Results' field and the 'Save Search As' field.

The screenshot shows the 'Saved Searches' dropdown menu with the following options:

- 1. All New Tickets
- 2. All Closed Incidents
- 3. High/Critical Open Tickets
- 4. All Open Tickets
- Pending My Actions

The screenshot shows the 'My Saved Searches' list with the following items:

- 1. All New Tickets
- 2. All Closed Incidents
- 3. High/Critical Open Tickets
- 4. All Open Tickets
- Pending My Actions

Red dashed boxes highlight the 'Pending My Actions' item.

Exporting Search Results

The user has the ability to export any Search Results into Excel format. For example, if the user ran their personal saved search "Pending my Action" they would get a similar output as below. (Number of incidents will differ)

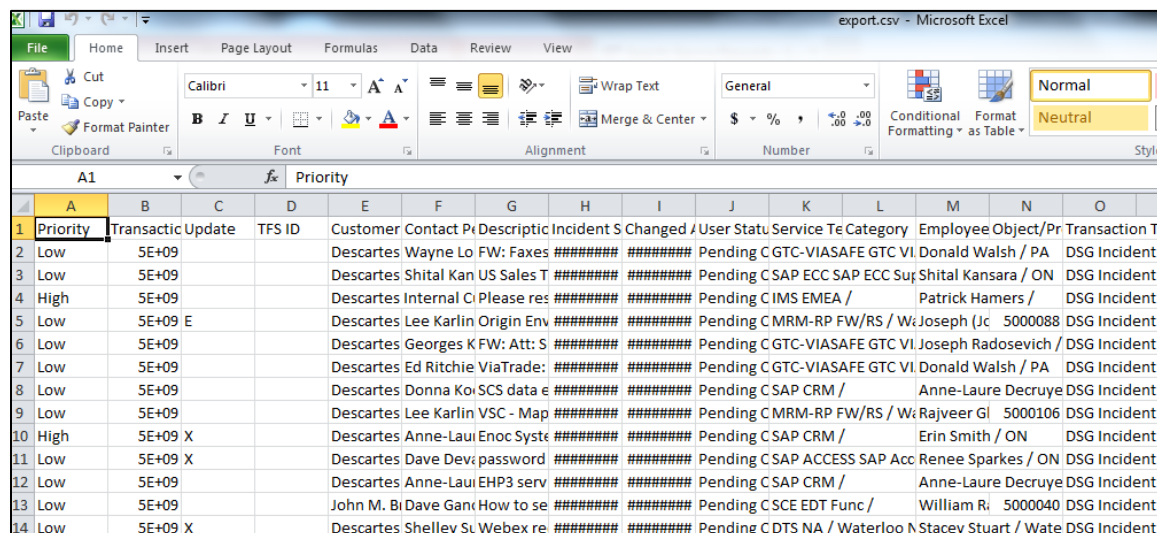


Priority	Transaction ID	Update	TFS ID	Customer	Contact Person	Description	Incident Start	Changed At
Low	5000546829			Descartes Internal Customer /	Wayne Lo /	FW: Faxes to Cole - Win...	08-01-2014 16:12:23	08-01-2014 2
Low	5000546668			Descartes Internal Customer /	Shital Kansara /	US Sales Tax	08-01-2014 13:38:56	08-01-2014 1
High	5000546432			Descartes Internal Customer /		Please reset password	08-01-2014 06:58:06	08-01-2014 1
Low	5000546259	E		Descartes Internal Customer /	Lee Karlinsky /	Origin Environment - acc...	07-31-2014 19:30:32	08-01-2014 1
Low	5000526638			Descartes Internal Customer /	Georges Khalil /	FW: Att: Supervisors - Po...	06-27-2014 10:24:48	06-27-2014 1

To export the results the user would select the Spreadsheet button as per above. Once the user selects the Spreadsheet button they will receive the below pop up.




The user has the ability to open the document and save it or the user can directly save it to their hard drive.



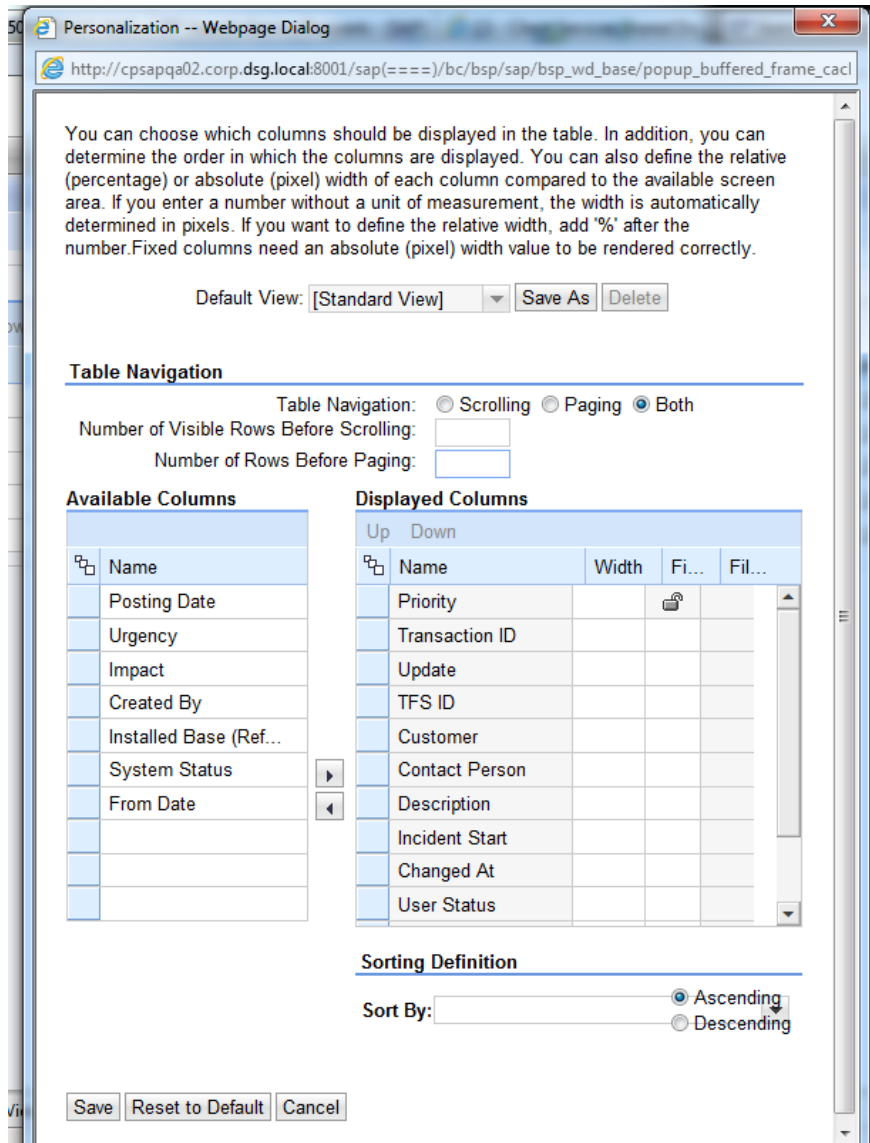
Priority	Transactio	Update	TFS ID	Customer	Contact P	Descriptio	Incident S	Changed /	User Statu	Service Te	Category	Employee Object/Pr	Transaction T
1 Low	5E+09			Descartes Wayne Lo	FW: Faxes	*****	*****	Pending C	GTC-VIASAFE	GTC VI	Donald Walsh / PA	DSG Incident	
2 Low	5E+09			Descartes Shital Kan	US Sales T	*****	*****	Pending C	SAP ECC SAP	ECC Sup	Shital Kansara / ON	DSG Incident	
3 High	5E+09			Descartes Internal C	Please res	*****	*****	Pending C	IMS EMEA /		Patrick Hamers /	DSG Incident	
4 Low	5E+09	E		Descartes Lee Karlin	Origin Env	*****	*****	Pending C	MRM-RP FW/RS /	W: Joseph (Jc	5000088	DSG Incident	
5 Low	5E+09			Descartes Georges K	FW: Att: S	*****	*****	Pending C	GTC-VIASAFE	GTC VI	Joseph Radosevich /	DSG Incident	
6 Low	5E+09			Descartes Ed Ritchie	ViaTrade:	*****	*****	Pending C	GTC-VIASAFE	GTC VI	Donald Walsh / PA	DSG Incident	
7 Low	5E+09			Descartes Donna Ko	SCS data e	*****	*****	Pending C	SAP CRM /		Anne-Laure Decruye	DSG Incident	
8 Low	5E+09			Descartes Lee Karlin	VSC - Map	*****	*****	Pending C	MRM-RP FW/RS /	W: Rajveer Gl	5000106	DSG Incident	
9 High	5E+09	X		Descartes Anne-Lau	Enoc Syst	*****	*****	Pending C	SAP CRM /		Erin Smith / ON	DSG Incident	
10 Low	5E+09	X		Descartes Dave Dev	password	*****	*****	Pending C	SAP ACCESS SAP	Acc	Renee Sparkes / ON	DSG Incident	
11 Low	5E+09			Descartes Anne-Lau	EHP3 serv	*****	*****	Pending C	SAP CRM /		Anne-Laure Decruye	DSG Incident	
12 Low	5E+09			John M. Bi	Dave Gan	How to se	*****	*****	Pending C	SCE EDT Func	/	William Ri	5000040
13 Low	5E+09			Descartes Shelley St	Webex re	*****	*****	Pending C	DTS NA /	Waterloo N	Stacey Stuart / Wate	DSG Incident	

The user selects open then an excel sheet will open and the user can manipulate the data if required and go to file and save as.

Personalization

By clicking on the  icon the user has the ability to personalize which columns to display/hide for search results.

The user may also select the order in which the columns will display by clicking on a column name and moving it up or down the list as well as selecting the percentage width of your column selections. Click Save to apply the changes.



You can choose which columns should be displayed in the table. In addition, you can determine the order in which the columns are displayed. You can also define the relative (percentage) or absolute (pixel) width of each column compared to the available screen area. If you enter a number without a unit of measurement, the width is automatically determined in pixels. If you want to define the relative width, add '%' after the number. Fixed columns need an absolute (pixel) width value to be rendered correctly.

Default View: [Standard View] Save As Delete

Table Navigation

Table Navigation: ☐ Scrolling ☐ Paging ☒ Both

Number of Visible Rows Before Scrolling:

Number of Rows Before Paging:

Available Columns

Name
Posting Date
Urgency
Impact
Created By
Installed Base (Ref...
System Status
From Date

Displayed Columns

Name	Width	Fi...	Fil...
Priority			
Transaction ID			
Update			
TFS ID			
Customer			
Contact Person			
Description			
Incident Start			
Changed At			
User Status			

Sorting Definition

Sort By: ☒ Ascending ☐ Descending

Save Reset to Default Cancel

For enhanced visibility, the columns can be further personalized by dragging the column header left or right to expand or reduce the width. Any changes to the width of the columns will be applied to all other searches.

DESCARTES™

Search: Service Requests
Archive Search

Result List: 5 Service Requests Found

New New from Template Create Follow-Up

Priority	Transaction ID	User Status	Customer	Update	TFS ID
	5000724260	New	Descartes Systems (USA)...		
	5000724258	New	Descartes Systems (USA)...		
	5000724257	In Process	Descartes Systems (USA)...		
	5000724252	New	Descartes Systems (USA)...		
High	5000457792	Assignment	Descartes Internal Custom...		

Additionally, filters may be applied to your search results by selecting the filter icon in the bottom right corner of the column header. Filters must be re-applied to any new searches.

Search: Service Requests
Archive Search

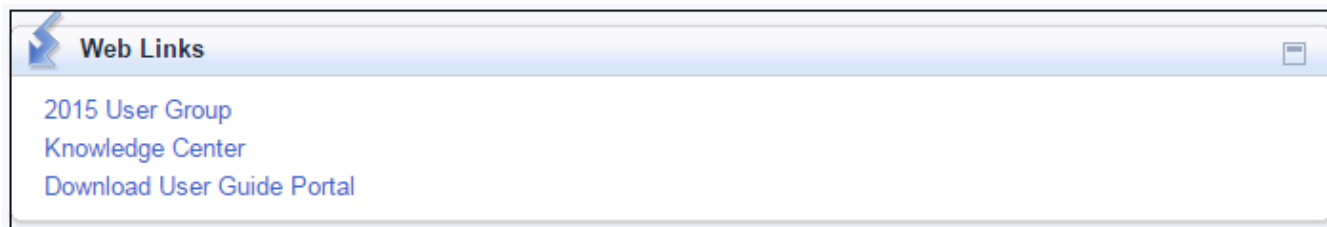
Result List: 3 Service Requests Found

New New from Template Create Follow-Up

Priority	Urgency	Impact	Transaction ID	Update	TFS ID	Customer
High	Critical	Extensiv...	Sort Ascending			Descartes I...
Low	Critical	Extensiv...	Sort Descending			Descartes I...
Medium			Fix Column Left			Descartes I...

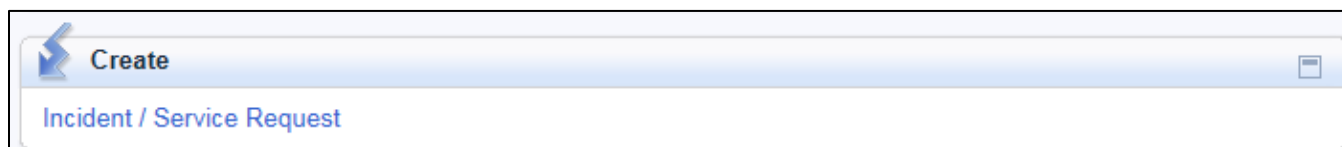
(All)
(Custom...)
5000492518
5000724293
5000724296

Web Links Assignment Block (3)

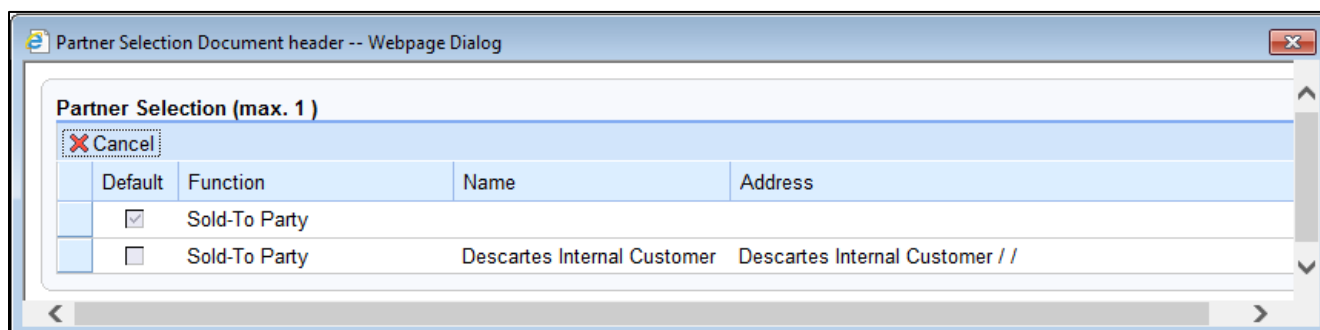


This assignment block allows the users to access important websites via the click of a button.

Create Assignment Block (4)



The user can create an incident and submit it to Descartes via this assignment block. If the user belongs to two or more accounts (Sold-To Party) the user will be prompted to select which account they wish to create an incident for.



For this example Sold-To Party Descartes Internal Customer will be selected.

DSG Incident: New

Save | Cancel | New | New from Template | Create Follow-Up | More+

Details | Edit

General Data

ID:
 Summary*:
 Customer: Descartes Internal Customer
 Contact Person: Bobby Floujeh
 Employee Responsible:
 Owner (Employee):
 Service Team: SD

Issue Categorization

Category 1:
 Category 2:
 Category 3:
 Category 4:

Processing Data

Status: New
 Impact/Urgency:

Dates

Time zone: UTC
 Incident Start: 01-13-2015 16:23:50

Note

Type: Problem Description
 English

Relationships

Product/ IT Item:
 Related Problem:
 Related Request for Change:
 Related Knowledge Article:

Interface ID

SCOM ID:
 TFS ID:

Notes

Attachments

Transaction History

Related Knowledge Articles

The user will need to enter text into the “**Summary**” field which is a high level or summary of the issue being reported. The next fields that the user will populate are the Impact/Urgency from the drop down. Upon completion of the impact/urgency the user will need to type in the problem description of the issue being reported in the Note field (**Max of 40 characters**). If the user would like to attach a document, the user will need to select attachment block.

Attachments | Attachment | URL | With Template | Advanced

No result found

New Attachment

Attachment -- Webpage Dialog

To attach a document, select the document using the value help. If you upload a document from your local hard disk, you can enter a name for the document. If you choose to enter a name, this name is displayed in the attachment list. If you do not enter a name, the file name is displayed.

Search Document

Document from Content Management:
 Attach as Link: ☐

Upload Document From Local Hard Disk

Name:
 Description:
 Upload Document From Local Hard Disk: Browse...

Attach Cancel

The user will select “**Browse**” and select the document they wish to attach and select the “**Attach**” button.

The user will type in a **name** and **description** of the attachment.

Once the attachment has been attached the user will be able to see it on the attachment block as shown below.

▼ Attachments Attachment URL With Template Advanced			
Actions	Name	Type	Created By
Properties	Training Doc	PDF File (Adobe Acrobat Exchange/Reader)	E514A533171

Once the user has entered all the necessary information, the user will press the save button. The screen will refresh and the user will receive an incident number as shown below.

DSG Incident: 5000547232, This is a test

Save | Cancel | New | New from Template | No text | Create Follow-Up | More ▾

▼ Details Edit

General Data

ID: 5000547232

Summary: This is a test

Customer: Descartes Internal Customer

Contact Person:

Employee Responsible:

Owner (Employee):

Service Team: SD

Processing Data

Status: New

Impact/Urgency: Low

Dates

Time zone: UTC

Incident Start: 01-13-2015 16:23

Note

Type:

This incident number is important as it is a unique identifier for that service request.

Additional Fields

When creating a ticket the user has the optional ability to select the category that their issue is related to. For example if the user is reporting a printing issue they can select “Printer” from category 1, a subset of categories will be populated. The categorization schema is based on the user’s account settings. This field is not mandatory and users can create incidents without populating this field. In future enhancements, the user will be able to search knowledge articles based on the categorization selected.

Issue Categorization	
Category 1:	<input type="text"/>
Category 2:	<input type="text"/>
Category 3:	<input type="text"/>
Category 4:	<input type="text"/>

Issue Categorization	
Category 1:	CSA Web
Category 2:	<input type="text"/>
Category 3:	<input type="text"/>
Category 4:	N/A

Category 1:	CSA Web
Category 2:	N/A
Category 3:	<input type="text"/>
Category 4:	<div> <div>Access Issue</div> <div>Bug Reporting</div> <div>Customs Communications</div> <div>Enhancement Request</div> <div>Information Request</div> <div>Installation/Initial Setup</div> </div>
Product/ IT Item:	<input type="text"/>

Other Home Page Functions

I. Home

This link will always return the user to the Home screen

II. Create

This link will allow the user to create a new Incident same as assignment block four

III. Recent Items

This will show the user recent transactions accessed

IV. Saved Searches, Advanced

This is a quick view of saved search same as assignment block two. Once the user selects the Saved Search from the drop down, the **"Go"** button must be selected. The user can press the advance button to view the search criteria and/or make modifications to the searches.

V. Log Off

This will log off the user from the Descartes Customer Portal and return them the Descartes Home Page.

VI. Back

This button allows the user to return to the previous page. (**Hint: Do not use the Browser X button as you will get logged out).**

VII. Print

This function allows the user to print the screen. A secondary window will open in print preview and the user can select File Print.

Updating an Existing Incident

The user can update an existing incident by selecting the incident they wish to update or request update for. To select the incident the user has multiple options here are some examples:

- [Search the incident via Service Request ID](#)
- [Stroll through Saved Searches](#)
- [Search via Posting Date](#) and scroll through the search results and select the appropriate incident.

Search: Service Requests

Archive Search

Search Criteria

Service Request ID	is	5000547235	⊕ ⊖
TFS ID	is		⊕ ⊖
Posting Date (Time Frame)	is		⊕ ⊖
Description	is		⊕ ⊖

Maximum Number of Results: 100

Save Search As: 1. All New Tickets

Result List: 1 Service Request Found

Priority	Transaction ID	Update	TFS ID	Customer
	5000547235			Descartes Internal Customer /

In this example the user searched via the Service Request ID. Once the result is displayed the user will click on the Transaction ID to open the incident.

DSG Incident: 5000547235, test

▼ Details

General Data

ID: 5000547235

Summary: test

Customer: Descartes Internal Customer

Contact Person: Bobby Floujeh

Employee Responsible:

Owner (Employee):

Service Team: SD

The user will click on the Edit button to access editing function of the incident.

The user will have two options to update the incident, option 1 via the log and option 2 via the notes section.

Option 1 (Log)

Note: The language should remain English

The user will type in the box their updates/request for update/ escalation. Upon completion of their notes the user will select the save button.

Option 2 (Notes)

Actions	Text Type	Text	Language
Log	Problem Description	01-14-2015 14:11:10 E514A533171 test	English

The user will select **"New"** and type in the box their updates/request for update/ escalation. Upon completion of their notes the user will select the back button and then the **"Save"** button.

DSG Incident: 5000547235, test

Save | Cancel | New | New from Template | No text | Create Follow-Up | More ▾

Printing the Content of Service Incidents

To print the content of an incident the user will click on the Print button as seen below.

DSG Incident: 5000547235, test Back

Save | Cancel | New | New from Template | No text | Create Follow-Up | More ▾

Details Edit

General Data Issue Categorization

Once the user has selected the Print button a new window will open in the browser.

http://cpsapq02.corp.dsg.local:8001/sap/b01/biz/PTewMCZxPW1pl DSG Incident: 5000547235, test cpsapq02.corp.dsg.local

File Edit View Favorites Tools Help

about:blank Google Suggested Sites Web Slice Gallery

SG Incident: 5000547235, test

Details Edit

General Data

ID: 5000547235
 Summary: test
 Customer: Descartes Internal Customer
 Contact Person: Bobby Floujeh
 Employee Responsible:
 Owner (Employee):
 Service Team: SO

Processing Data

Status: New
 Impact/Urgency: Low

Dates

Time zone: UTC
 Incident Start: 01-14-2015 14:07:31

Note

Type: Problem Description English
 I would like to inform the technical support agent that this issue is resolved.

Issue Categorization

Category 1:
 Category 2:
 Category 3:
 Category 4:

Reference Objects

Product/ IT Item:

Relationships

Related Problem:
 Related Request for Change:
 Related Knowledge Article:

Interface ID

SCOM ID:
 TFS ID:

Notes New

Actions	Text Type	Text	Language
	Problem Description	I would like to inform the technical support agent that this issue is resolved.	English
	Log	Problem Description 01-15-2015 15:12:03 E514A533171 I would like to inform the technical support agent that this issue is resolved. Problem Descriptio...	English

Attachments Attachment URL With Template

No result found

The user will then select File and then print from the browser.

Email Transactions

The user has the ability to view all email transaction history that is associated with the incident. Emails get associated to incidents when the emails are sent to servicedesk@descartes.com and/or sdresponse@descartes.com. When a user is creating an incident via email they are to use servicedesk@descartes.com email address. This email will generate an incident and the user will receive email notification. If the user wishes to respond to the email they must reply to sdresponse@descartes.com. The sdresponse@descartes.com email will contain a string ***** DO NOT DELETE {SrvReqNo:[5000xxxxxx]} DO NOT DELETE ***** this is very important as this links the email to the incident.

In the Descartes Customer Portal the user can view all related email transactions. Once the incident is opened the user can go to the Transaction History assignment block.

Transaction History			
Actions	Transaction	Transaction Type	Date
	IN FW: Faxes to	Office Document	08-01-2014
	SENT RE: FW: Faxes	Office Document	08-01-2014
	IN RE: FW: Faxes	Office Document	08-01-2014
	SENT RE: RE: FW: Faxes to	Office Document	08-01-2014
	IN RE: FW: Faxes to	Office Document	08-01-2014
	SENT RE: FW: Faxes to	Office Document	08-01-2014

By clicking on the Hyperlink the user can see the email communication. This is a **read only** screen and the user will not be able to reply or use any functionalities. Once the user wants to return to the incident screen they must use the "Back" button to navigate to previous screen.

E-Mail: Received, FW: Faxes to

Save | New | Send | Print

E-Mail

Check Addresses | Show/Hide

To: servicedesk@descartes.com

Subject: FW: Faxes to

Times New Roman | 1 (8 pt) | B | I | U | Text Color | Background Color | Bulleted List | Numbered List | Indent Left | Indent Right | Decrease Indent | Increase Indent

Hello,

Can someone take a look at our outbound faxes to () if there are any issues?

has been sending since 7:55am. GLN is showing that's its retrying but each retry attempt appears to be hour:

Errors

A list of errors encountered during the processing of this fax session.

Fax Session Status: Unresolved

Status	Error	Details	User	Created
+	f	c		2014-08-01 07:56:0
+	s	E		2014-08-01 09:11:0
+	f	c		2014-08-01 09:13:0

Questions & Remarks

If you have questions, remarks or problems regarding the Descartes Customer Portal please do not hesitate to contact the Descartes Service Desk via email at servicedesk@descartes.com or by phone (North America: 877 786 9339, Outside North America: +800 7866 3390, EMEA: +32 3 303 11 11)

ALTERNATIVE METHODS OF CONTACTING THE SERVICE DESK

Email:

Messages delivered to the Service Desk Mailbox (servicedesk@descartes.com) will be recorded by the Service Desk Portal, acknowledged to the customer with a Ticket number and then distributed to the appropriate Expertise Centre for resolution. Customers can check on the progress of these tickets at any time in the Portal. Customers will be notified of resolution by email, within the defined SLA for their service.

N.B. There is no prioritization made for service requests raised via email which may result in a delay to resolution. We would, therefore, advise use of the portal to ensure that the appropriate prioritization has been given.

Telephone:

Customers can call the Service Desk, per their SLA, (North America: 877 786 9339, Outside North America: +800 7866 3390, EMEA: +32 3 303 11 11) and select the appropriate option of the phone tree to gain access to their Expertise Centre. Customers should be prepared with details and/or their existing Ticket number. For new questions, customers may be provided a Ticket number at time of call, which they can track through the Customer Support Portal. If requested, customers will receive a response by phone during normal Hours of Operation.

FREQUENTLY ASKED QUESTIONS

PORTAL

What are the password rules? Is there a minimum number of characters and should there be a mixture of letters, numbers and special characters?

The only requirement is a minimum of 6 characters and a maximum of 8 characters. This does not have to be a combination of characters/numerals. Only one password change is allowed per day. If you need assistance with a password reset you should call or email the service desk (servicedesk@descartes.com).

Will I be able to access historic incidents/service requests even when they have been closed?

Incidents raised prior to 'Go Live' date or created on any previous portal will not be available via the new and improved portal. Should you need assistance with previously raised service requests, please email the service desk (servicedesk@descartes.com).

There is an option to search for ALL service requests across the company. Are there restrictions dependent upon administrative rights?

No, there are no restrictions based on administrative rights.

If I raise an incident via the telephone or via email, will this be automatically entered into the portal for me to track?

Yes, the incident will be automatically entered into the portal for you to track.

There is no prioritization made for service requests raised via email which may result in a delay to resolution. We would, therefore, advise use of the portal to ensure that the appropriate prioritization has been given.

Note also that if you submit a request via email, the body of your email does not get carried over to the portal notes.

Is there a limit to the number or size of attachments I can send?

With the release, you are able to add an attachment up to 10 Megabytes.

If I wish to request an enhancement, should I do this via the Portal?

We advise that you document your enhancement requests via a service request. Your expertise centre will forward the request to development for further investigation.

Who do I contact if I require additional user logins?

Please contact the service desk either via phone or email (servicedesk@descartes.com). They will be able to provide you a userID and password.

Who do I contact if I am experiencing any difficulties?

Please contact the service desk either via phone or email (servicedesk@descartes.com).

My type of issue is not listed. What should I do?

Select the most appropriate categorization listed and ensure you provide a detailed description of the request in the free text description box. Your request will be routed to the correct service team based on the information you have provided.

How do I attach a screen shot?

If you would like to attach a screen shot via the portal please upload it as an attachment. If you would like to send a screen shot via email, you may leave it in the body of the email.

I have sent a request for Information. How can I change that to a High priority?

Please update the incident and ask the service agent to adjust the priority.

I only want to search for open requests. How can I do this?

Go to Saved Searches either in the assignment block or on the navigation bar and select **4. All Open Tickets**.

My colleague can see all tickets, while I can only see my tickets

This is possible, you can send a request where the manager requests and approve access of other persons within the company to see each others tickets.

EMAIL

Previously I have used a 'product specific' email address. Does the servicedesk@descartes.com email address replace this?

Yes, the new "servicedesk" address replaces these retired product specific email addresses.

Previously I have used 'customersupport@descartes.com' email address. Can this still be used?

No, this address has now been retired and cannot be used for new incidents.

If I raise an incident via email, will this be automatically entered into the portal for me to track?

Yes, the incident will be automatically entered into the portal for you to track.

There is no prioritization made for service requests raised via email which may result in a delay to resolution. We would, therefore, strongly advise use of the portal to ensure that the appropriate prioritization has been given.

Note also that if you submit a request via email, the body of your email does not get carried over to the portal notes.

TELEPHONE

I currently use a different telephone number to access the service desk. Should I continue to do this?

Until you are given notification to retire this existing number you may continue using the current number.

If I raise an incident via the telephone, will this be automatically entered into the portal for me to track?

As soon as the service desk enters the incident into the system it will be made available on the portal in real time.

APPENDIX A

Status	Description	Resolved
New	This is the default status upon creation of an incident. All agents must change this status as soon as they take ownership over the ticket to something more appropriate.	No
Assignment	Some agents use this status when they are reassigning an incident to another service team and it may or may not be "new". This will not be used by the Service Desk	No
In Process:	This implies that the support agent has taken ownership of the incident and is investigating a resolution	No
Pending Customer Action:	Customer action needs to occur before the agent can continue investigating a resolution. (e.g. Asking for a print screen)	Yes
Pending Customer Closure	Customer wishes to confirm that incident has been resolved before closing.	Yes
First Call Resolution:	The agent was able to resolve the issue directly without 2nd line support. <u>No email is sent to the client when this status is used.</u>	Yes
Forwarded to Prod. Dev:	The incident needed to be escalated to product development for further investigation. Workaround provided. Used for internal Escalation	Yes
Pending Change Request:	This incident has been moved into the request for change process and is awaiting resolution. Used for internal Escalation	Yes
Pending 3rd party:	In some cases we are dependent on third parties. For example, we have multiple 3 rd party facilities in which we work with to host our hardware. If communication is lost to our hardware we may need to intervention of a 3 rd party in order to resolve the issue. When a ticket needs to be handled by professional services or a team which does not work with SAP CRM we also use the status Pending 3 rd party.	Yes
Solution Provided:	If a solution is found agents can change the status accordingly. This gives clients an opportunity to comment before an incident is put into closure status.	Yes
Solution and Planning Provided:	Upon receiving an update from TFS the system will change the status to "solution and planning provided".	Yes
Closed and Resolved	The incident was closed and a resolution was found. After selecting this status, an <u>automated email is sent</u> upon saving of the incident.	Yes
Closed Unresolved	The incident was closed but no resolution was found. After selecting this status, an <u>automated email is sent</u> upon saving of the incident.	Yes
Closed No Feedback	The incident was closed because we received no response from the client. <u>No email is sent to the client when this status is used.</u>	Yes
Cancelled	Ticket is created by accident; double ticket. No email is sent to the client.	N/A

APPENDIX B

Severity	Definition	Priority
Level 1 – Critical	Complete or partial failure of the system or part of the system resulting in service unavailability or mission-critical business processes with no immediately available workaround	Very High
Level 2 – High	The partial failure of the System or part of the system resulting in reduced overall service availability (performance degradation) for users.	High
Level 3 – Medium	A system requires an intervention but the operation can continue without the change being implemented.	Medium
Level 4 – Low	All questions or requests of information on the use of the service.	Low