DESCARTES

DESCARTES User Guide

Descartes Customer Service Portal

Version 1.10 July 2015

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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.

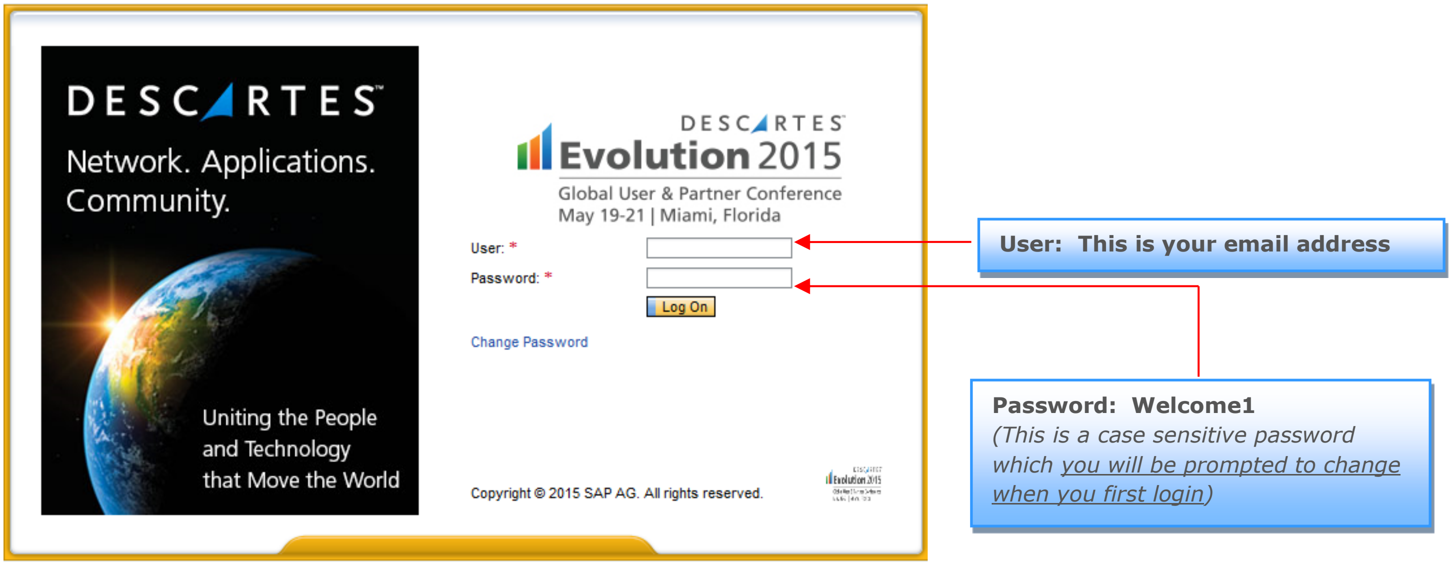
Access to the Portal

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

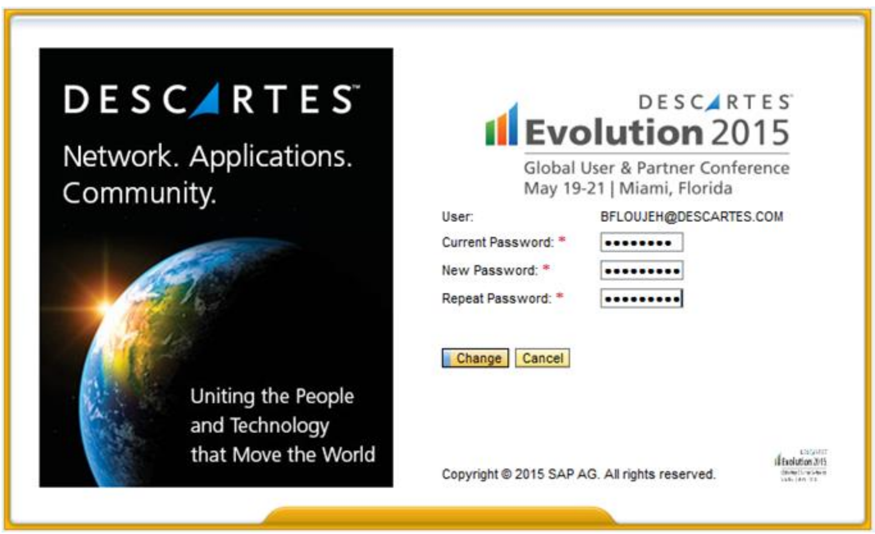
https://servicedesk.descartes.com

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).



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



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:

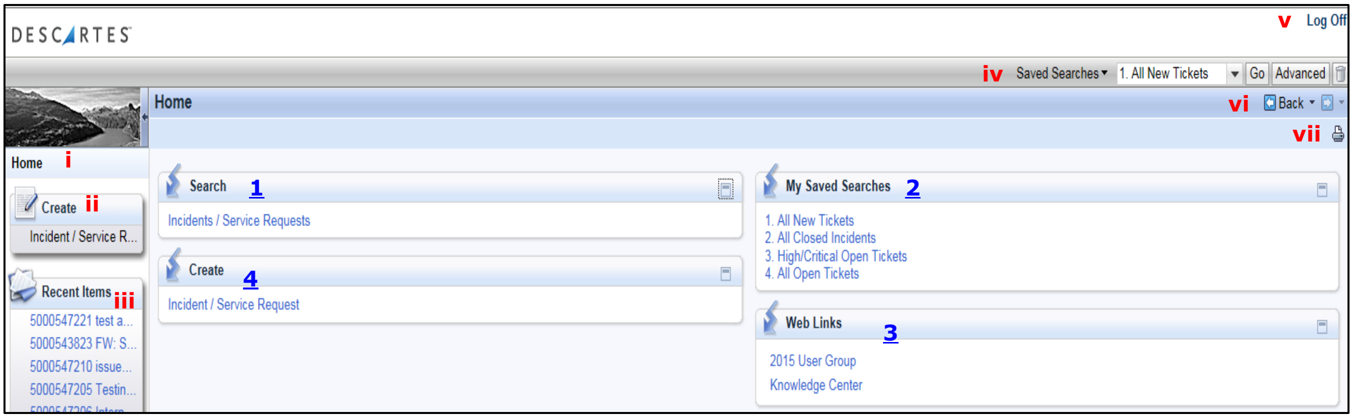
- Creation of New Service Requests
- Attachment of Documents
- Search/view/amend/print Existing Service Requests
- Knowledge Base & FAQs (coming soon)
- Ability to export incidents and searches into MS Excel

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



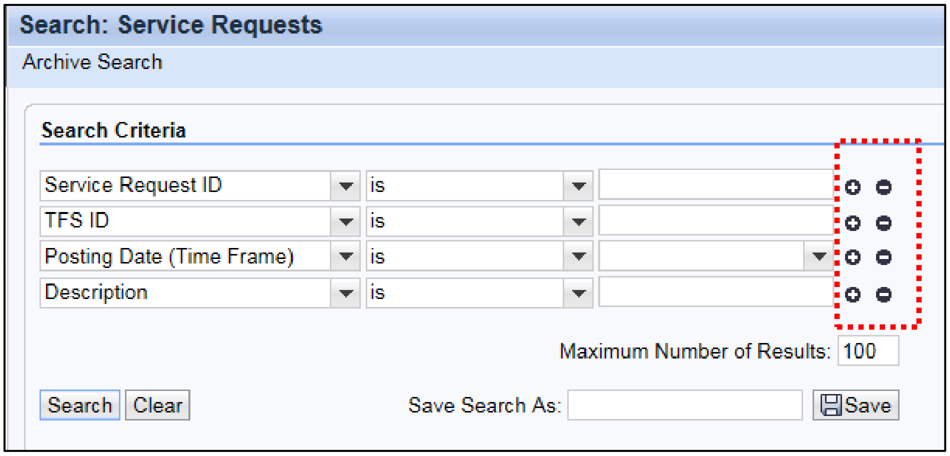
The "**Home**" screen is broken into four assignment blocks (1-4 as per diagram).

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)



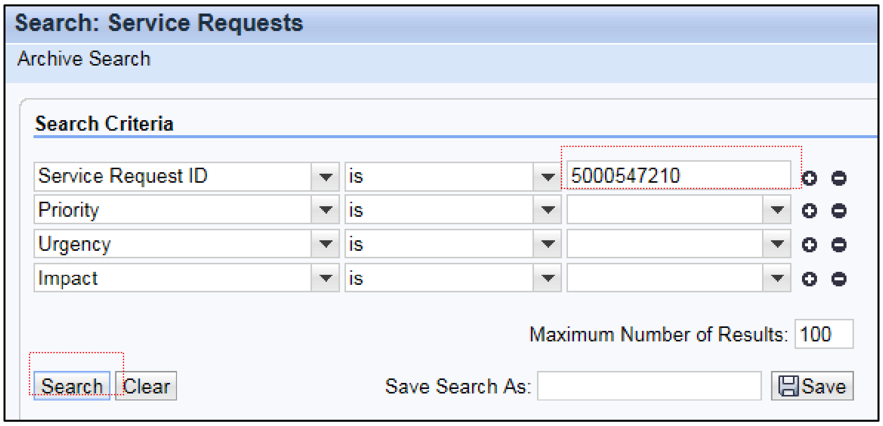
In the Search assignment block the user has the ability to search incidents based on or using a combination of the following search criteria:

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 not 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.

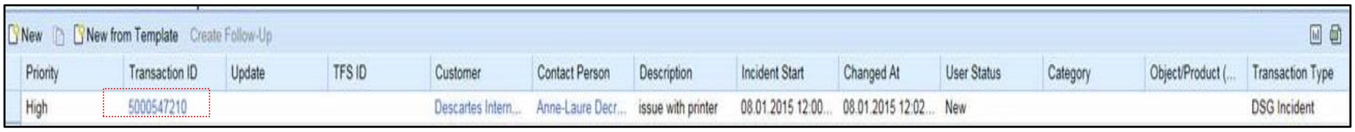
Service Request ID: The incident ID (Ticket #)

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.



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

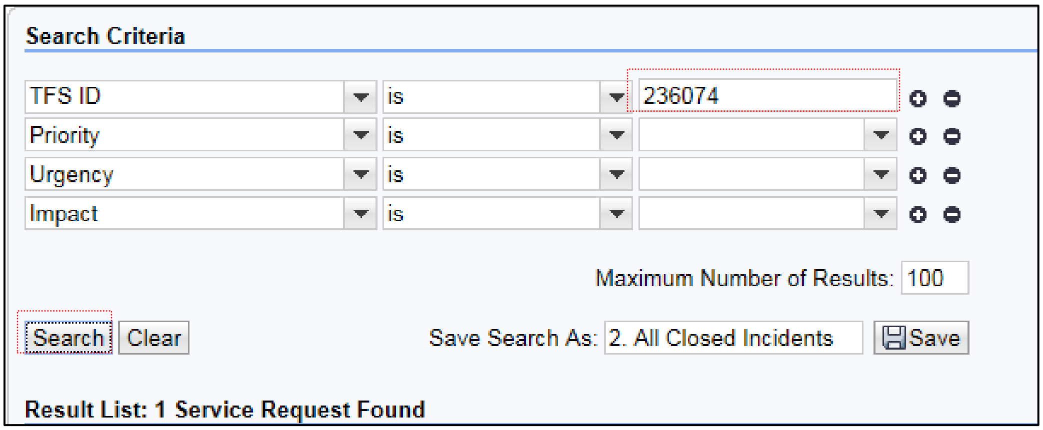
The user will get the incident result as shown below. To view the details of the incident the user must click on the Transaction ID hyperlink. The user has the ability to see at a high level the following fields associated with that incident:



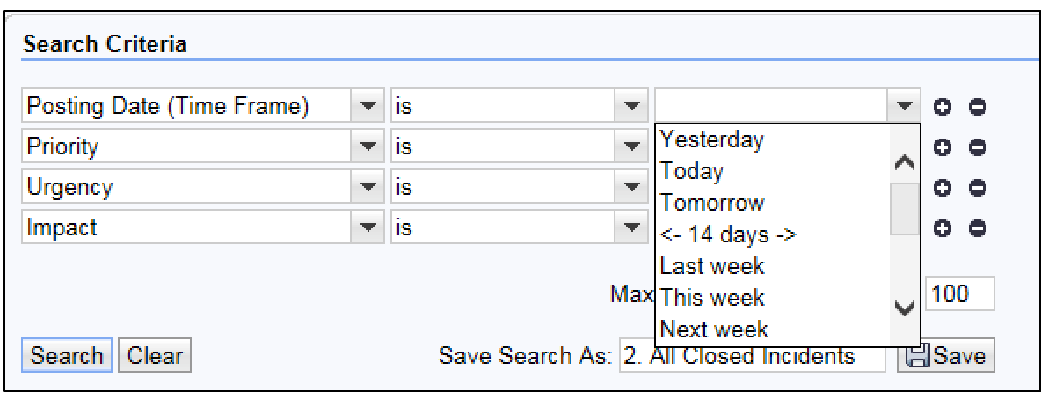
i. Priority:
ii. Transaction ID:
iii. Update:
iv. TFS ID:
v. Customer:
vi. Contact Person:
vii. Description:
viii. Incident Start:
ix. Changed At:
x. User Status:
xi. Category:
xii. Object Product (Reference Object):
xiii. Transaction Type:

TFS ID

This is a straight forward search if the user has the TFS ID. TSF 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.

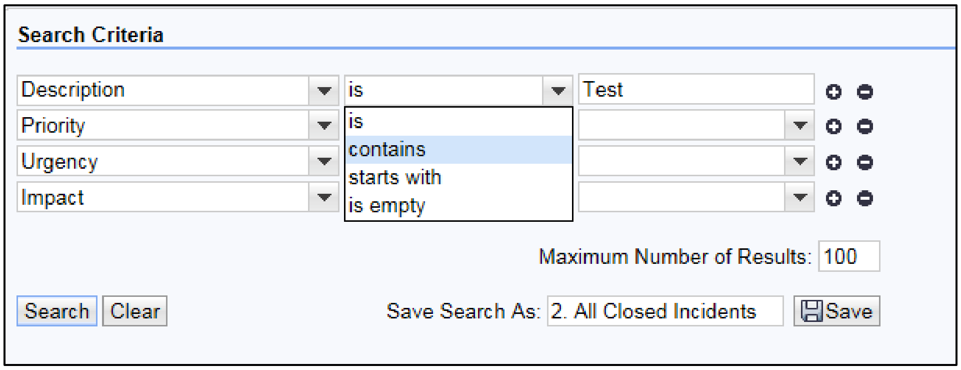


Posting Date (Time Frame)



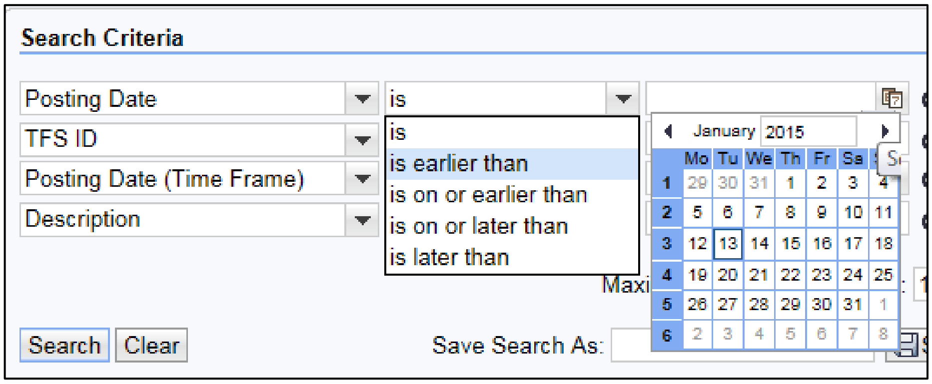
This search allows the user to search all incidents that were created within the predefined Time Frame. For example, if the user selects the "Last Week" search and selects the "Search" button, the function will return all incidents that were created within the last seven days.

Description



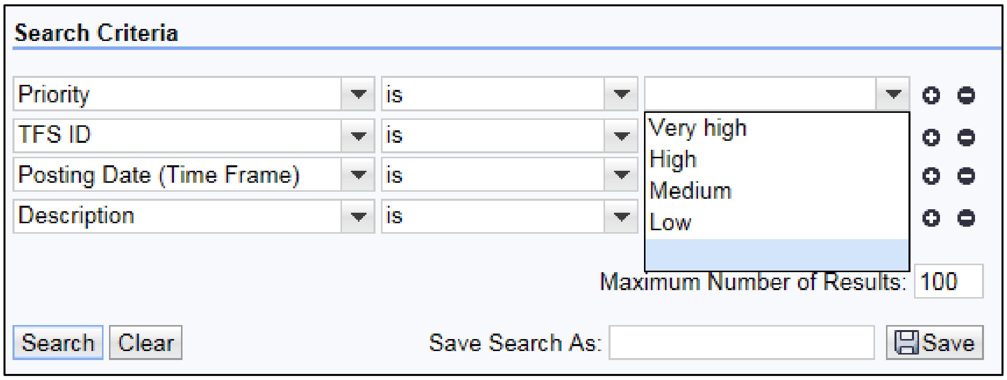
This search allows the user to search by incident "Description" with certain parameters such as "contains", "starts with", or "is empty". For example, if the user selects "Description", selects parameter "contains" and types "Test" and then selects the search button, the system would return all incidents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

Posting Date



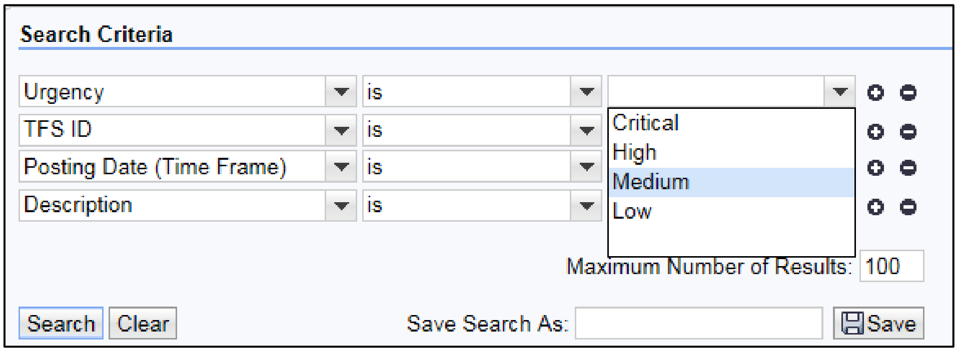
This date search allows for specific date, or date ranges to be selected by the user. The user will select "**Posting Date**" followed by a parameter such as "**is**" then enter a date or click on the box to activate a calendar. Once the date is selected or inputted the user will select search and will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

Priority



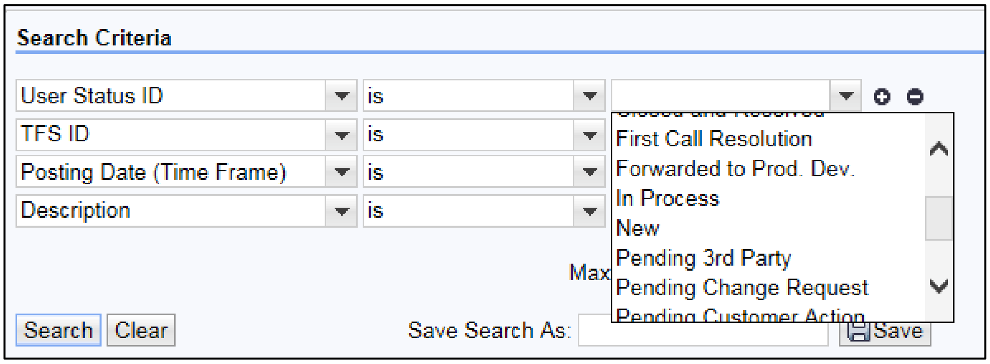
The user has the ability to search all incidents by "**Priority**" assigned to the incident. For example, if the user wanted to search all incidents that were set to "**Very High**" then they would select the very high value and select the "Search" button. For a definition of Priorities please refer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

Urgency



The 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.

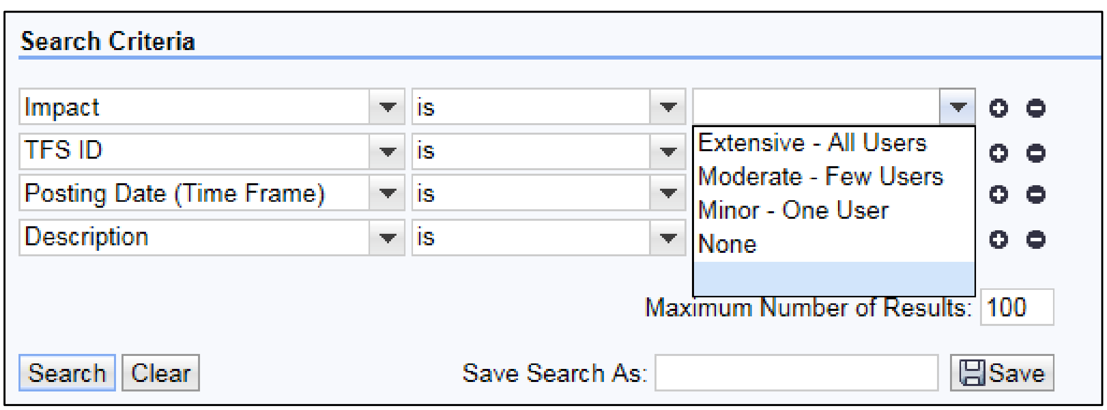
User Status ID



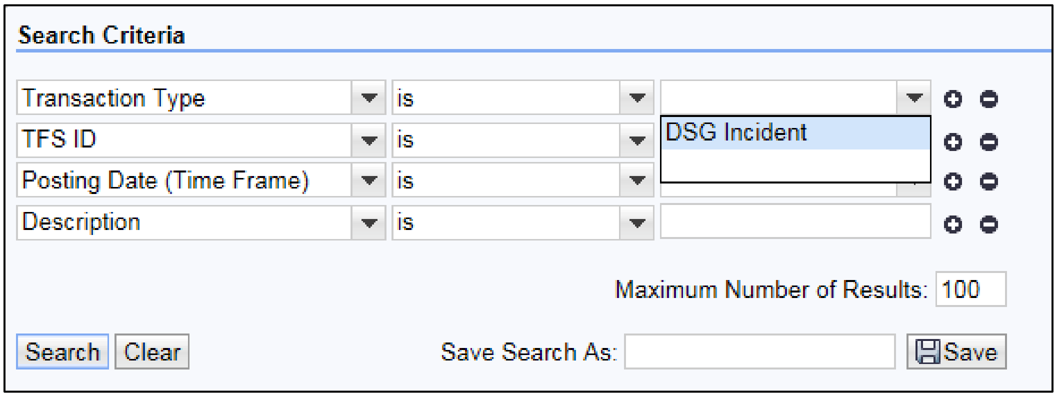
This search allows the user to search incidents by incident status. For a definition of incident statuses please refer to Appendix A. The user selects "**User Status ID**" and the status of incident they are looking for such as "**New**" and selects the Search button.

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.

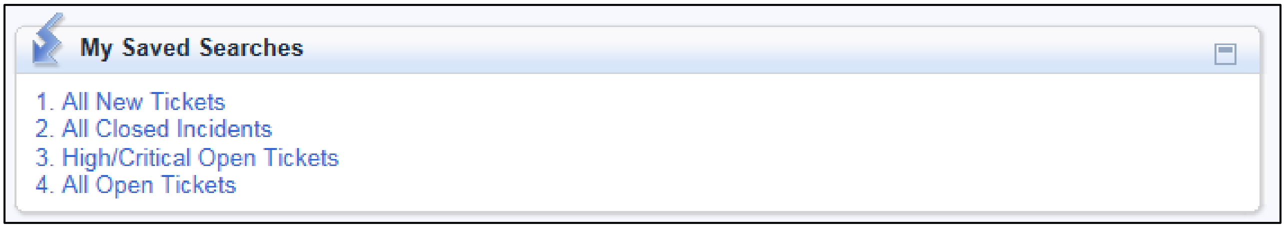


Transaction Type



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.

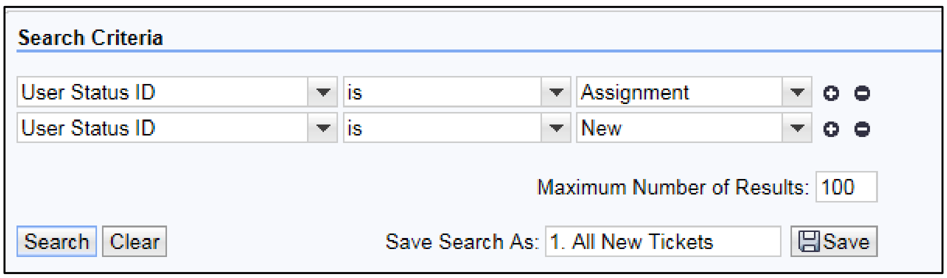
My Saved Searches Assignment Block (2)



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

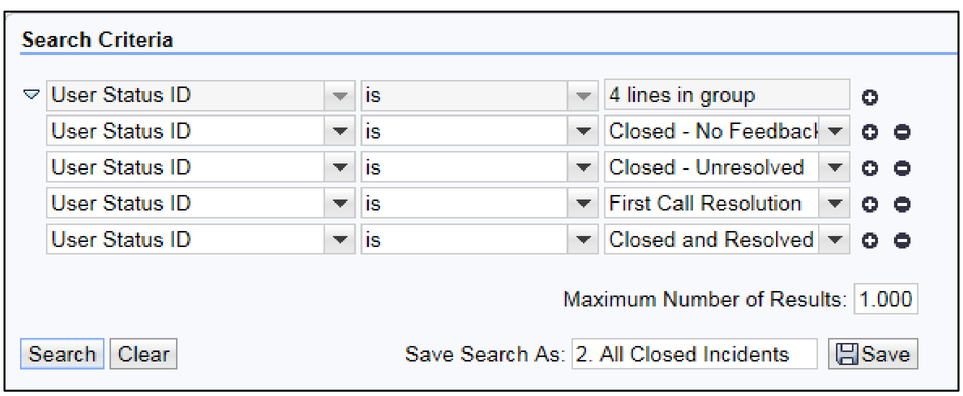
1. All New Tickets

This predefined search returns all incidents in “User Status ID”: “Assignment” and “New.” For a definition of incident statuses please refer to Appendix A.



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.



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.

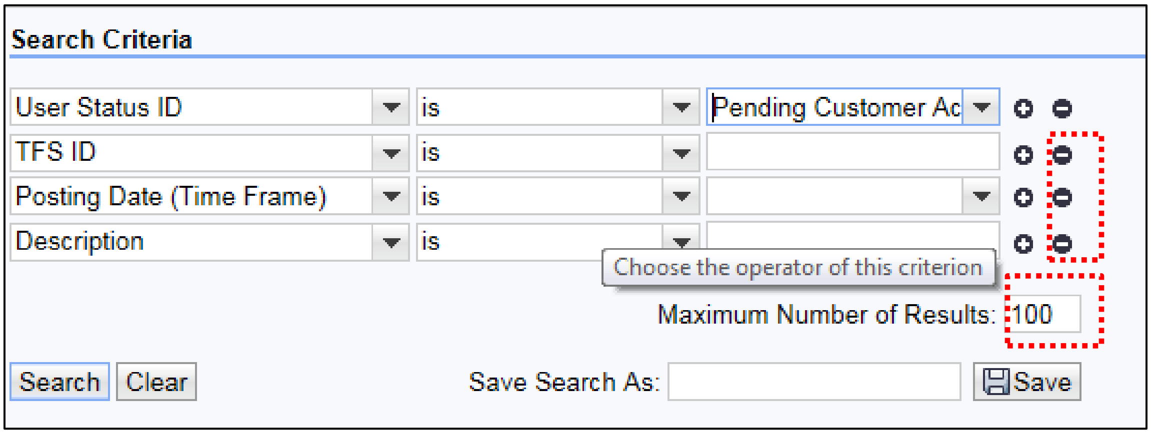
Search Criteria

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

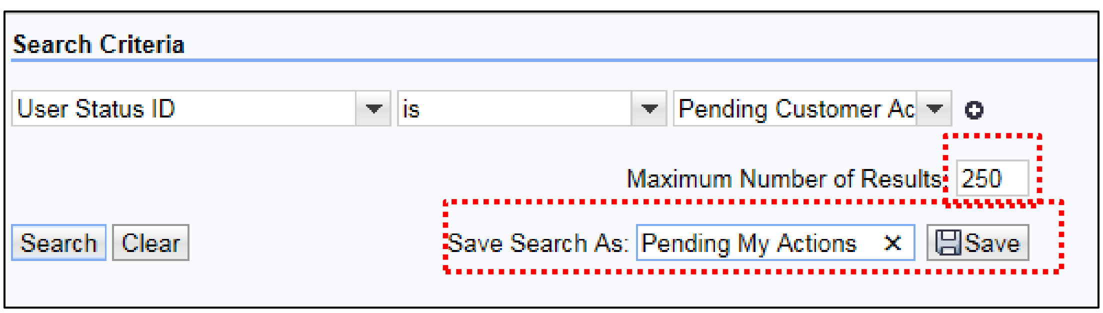
Creating Personal Saved Searches

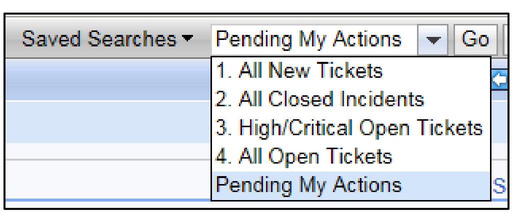
The user will also have to ability to create their own Personal searches and save them for their convenience. For example, the user wanted to create a search that will pull all incidents that are in status "Pending Customer Action"

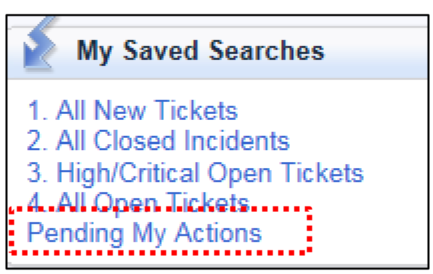
From the search screen the user would do the following:



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.







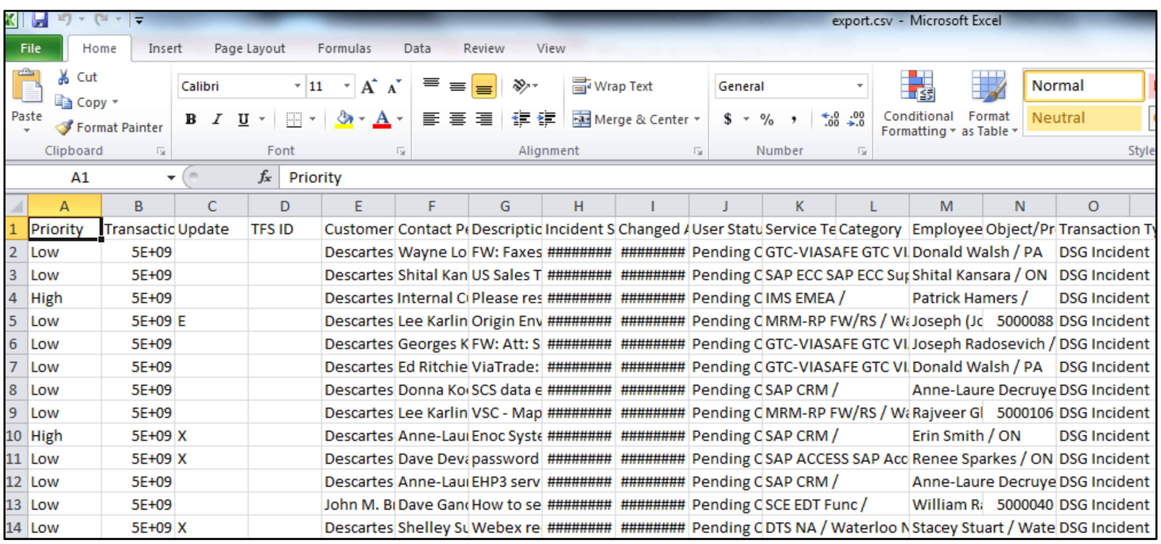
Exporting Search Results

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.

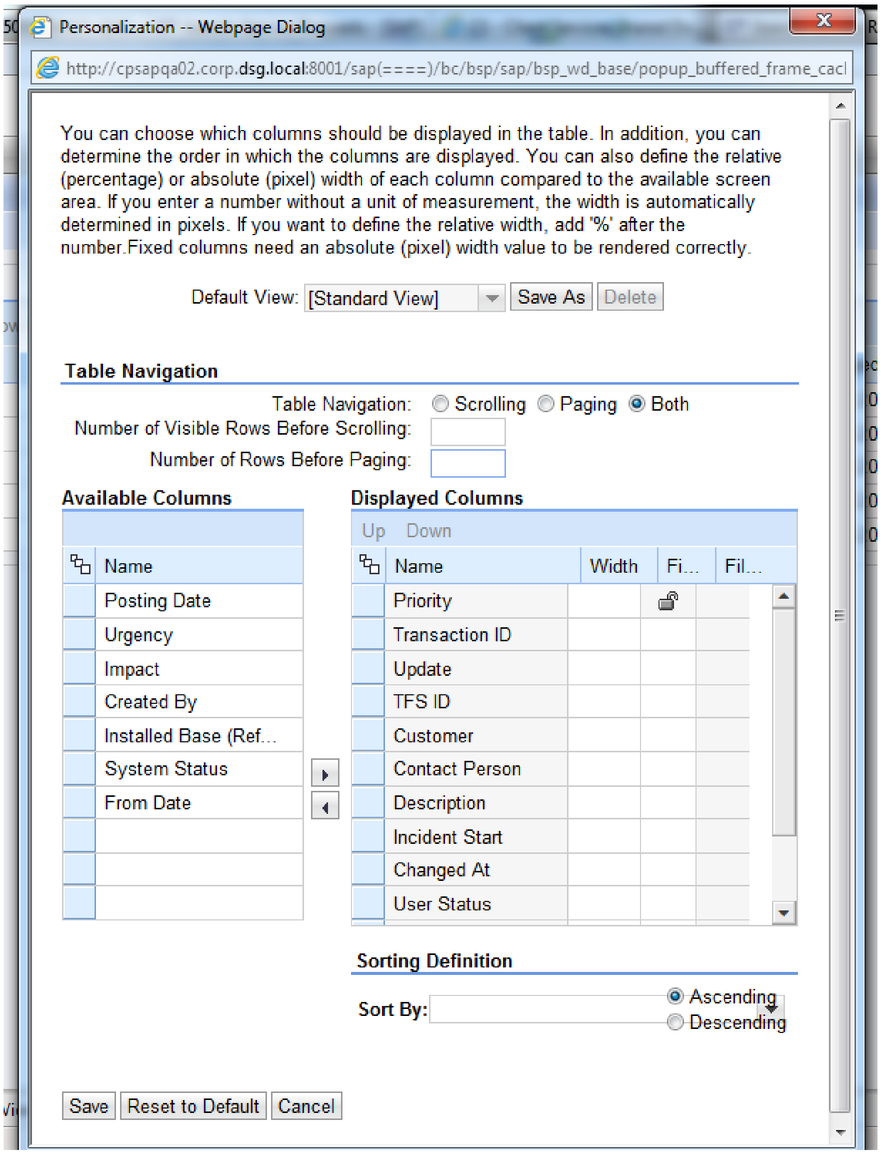


	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Priority	Transactic	Update	TFS ID	Customer	Contact Pe	Descriptic	Incident S	Changed A	User Statu	Service Te	Category	Employee	Object/Pr	Transaction Ty
2	Low	5E+09			Descartes	Wayne Lo	FW: Faxes	########	########	Pending C	GTC-VIASAFE GTC VI		Donald Walsh / PA		DSG Incident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

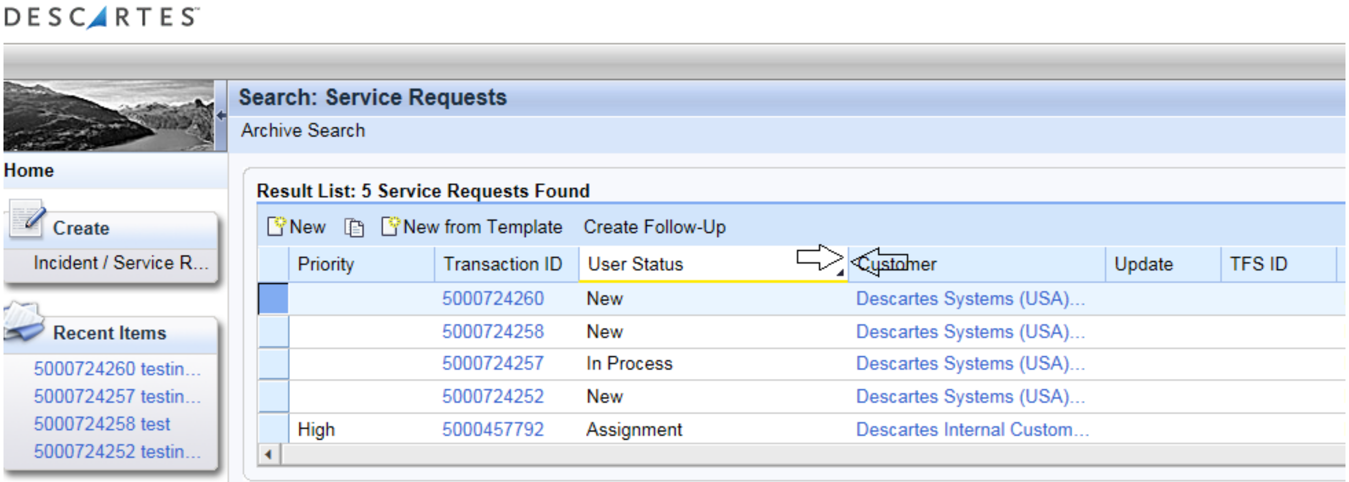
The user selects open then an excel sheet will open and the user can manipulate the data if required and go to file and save as.

Personalization

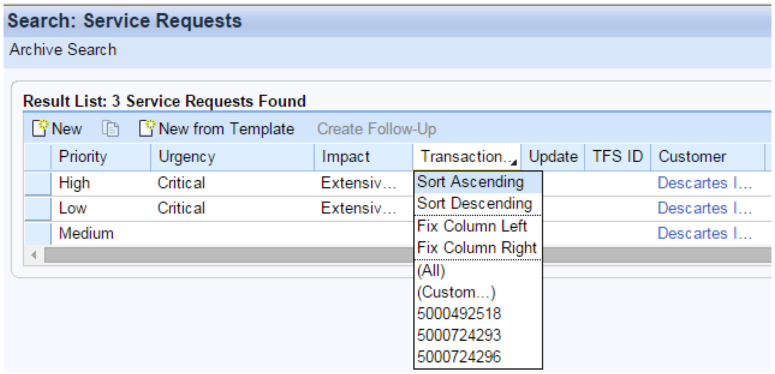
By clicking on the  icon the user has the ability to personalize which columns to display/hide for search results.
The user may also select the order in which the columns will display by clicking on a column name and moving it up or down the list as well as selecting the percentage width of your column selections. Click Save to apply the changes.



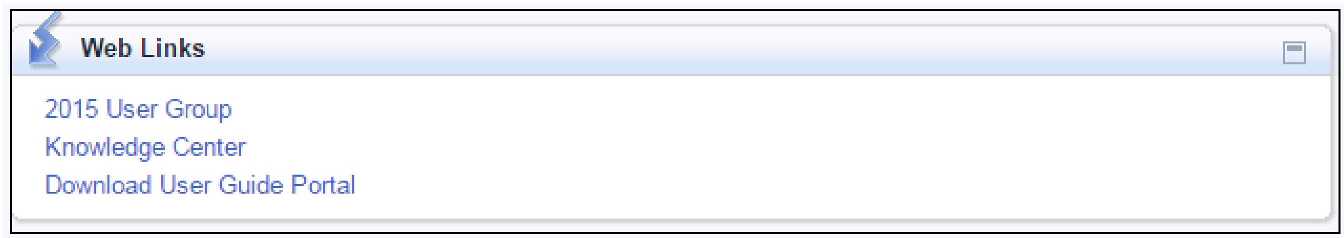
For enhanced visibility, the columns can be further personalized by dragging the column header left or right to expand or reduce the width. Any changes to the width of the columns will be applied to all other searches.



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.

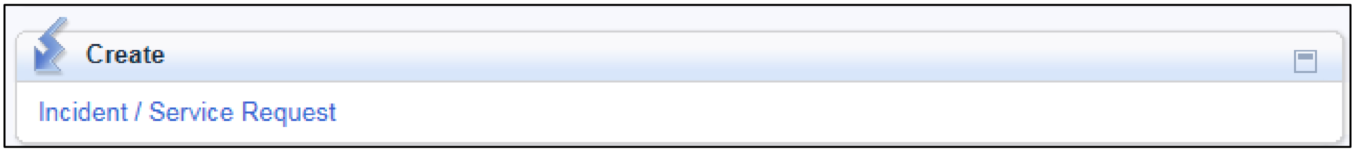


Web Links Assignment Block (3)

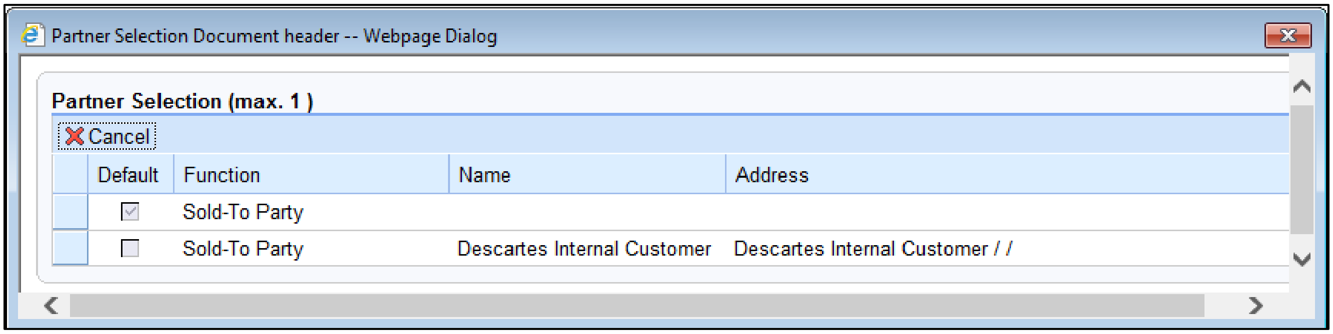


This assignment block allows the users to access important websites via the click of a button.

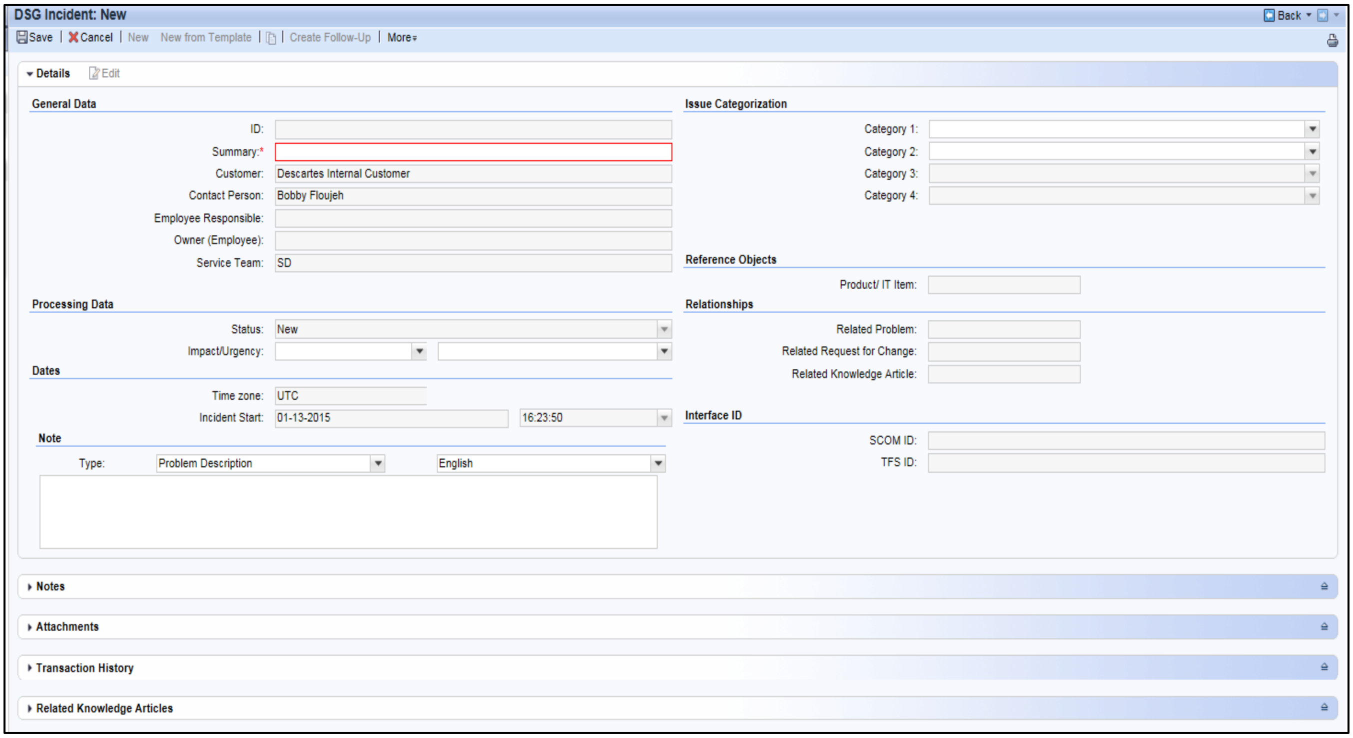
Create Assignment Block (4)



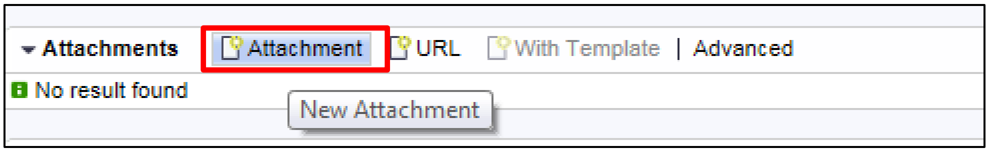
The user can create an incident and submit it to Descartes via this assignment block. If the user belongs to two or more accounts (Sold-To Party) the user will be prompted to select which account they wish to create an incident for.

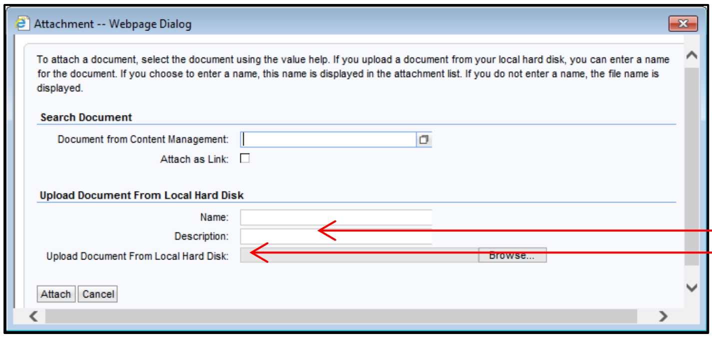


For this example Sold-To Party Descartes Internal Customer will be selected.



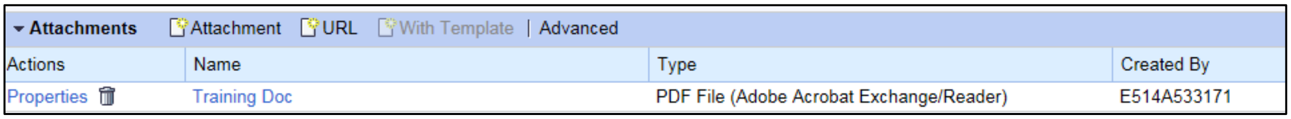
The user will need to enter text into the "**Summary**" field which is a high level or summary of the issue being reported. The next fields that the user will populate are the Impact/Urgency from the drop down. Upon completion of the impact/urgency the user will need to type in the problem description 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.



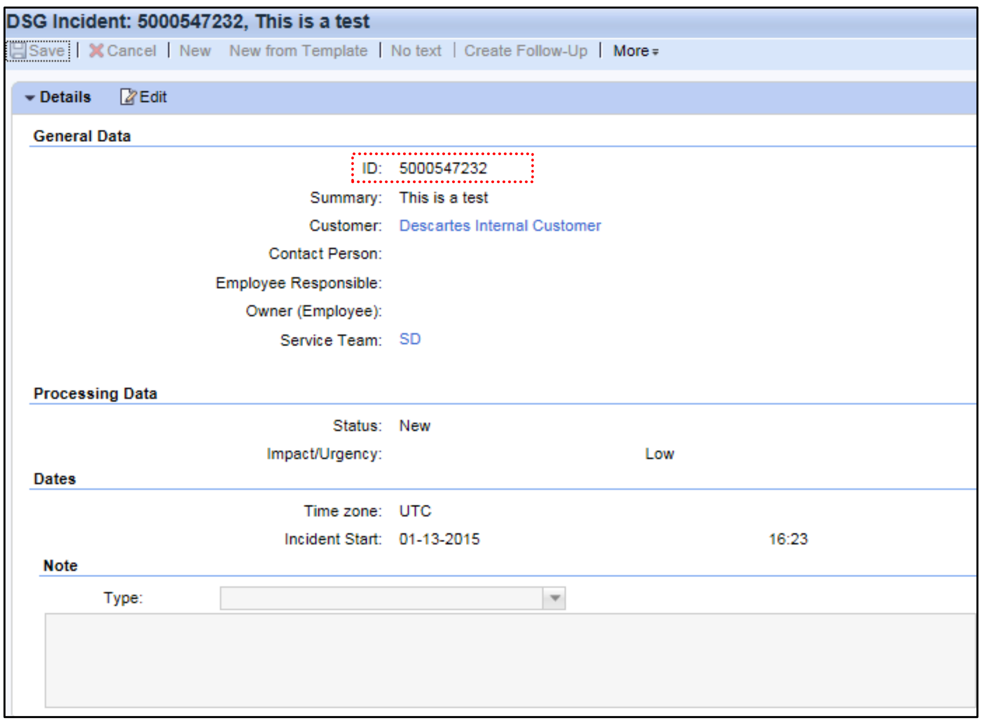


The user will select "**Browse**" and select the document they wish to attach and select the "**Attach**" button.
The user will type in a ***name*** and ***description*** of the attachment.

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



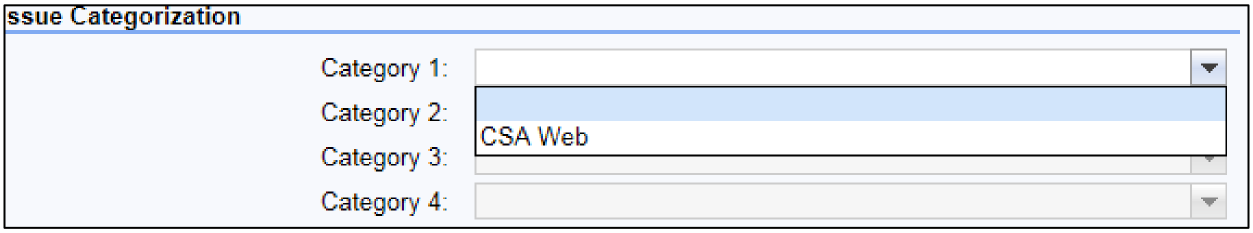
Once the user has entered all the necessary information, the user will press the save button. The screen will refresh and the user will receive an incident number as shown below.

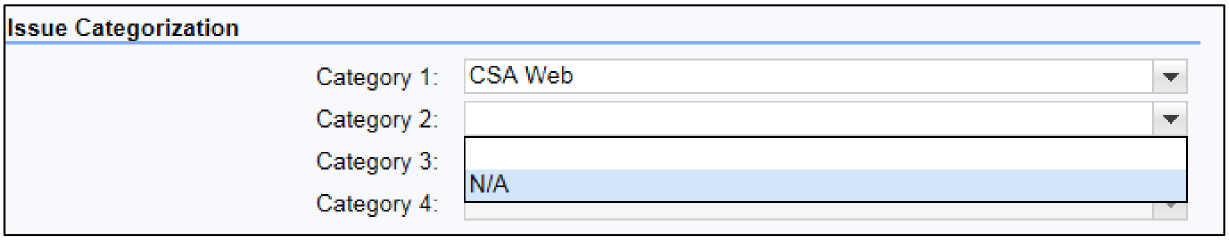


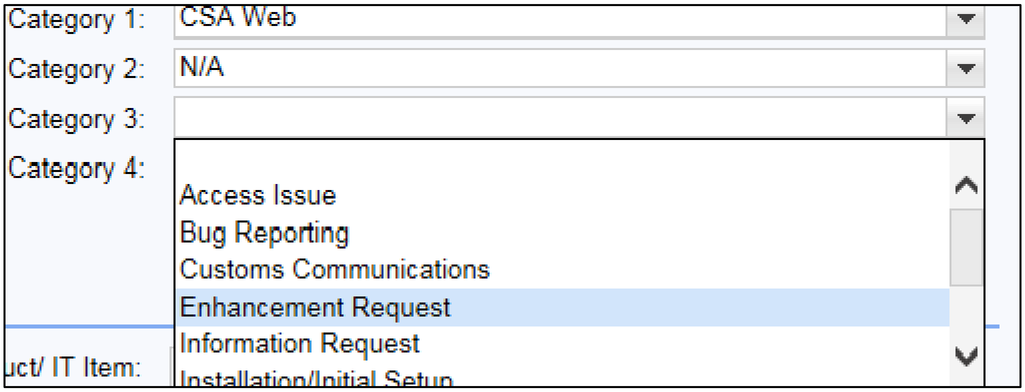
This incident number is important as it is a unique identifier for that service request.

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.







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).***

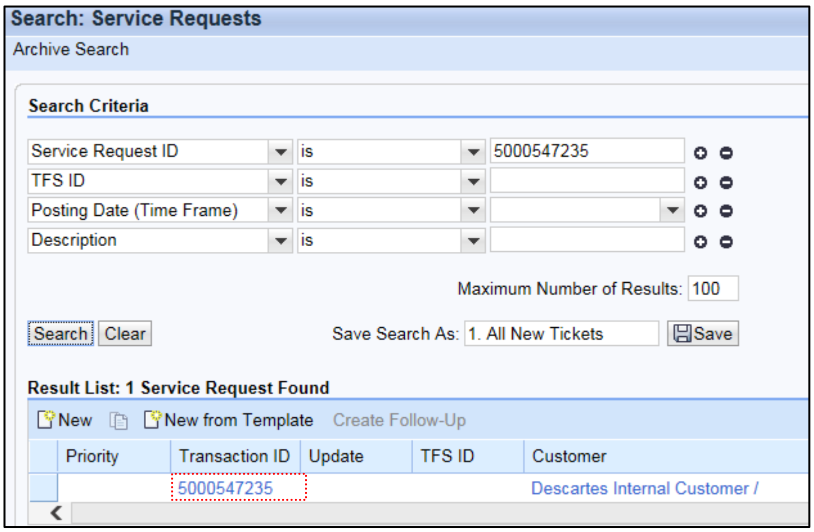
VII. Print

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

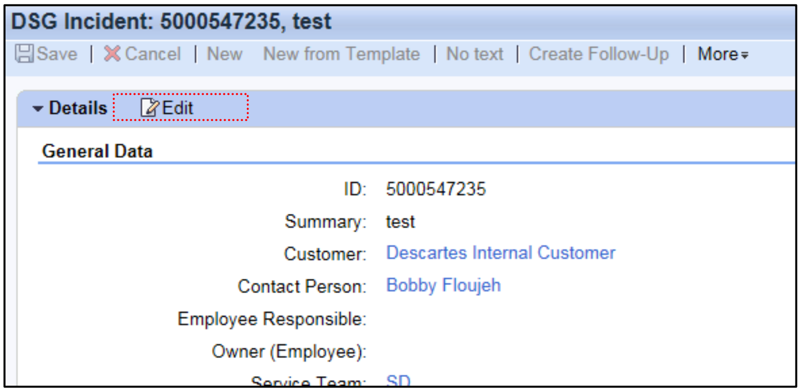
Updating an Existing Incident

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.



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.



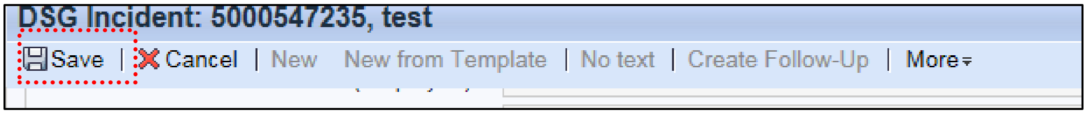
The user will click on the Edit button to access editing function of the incident.

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

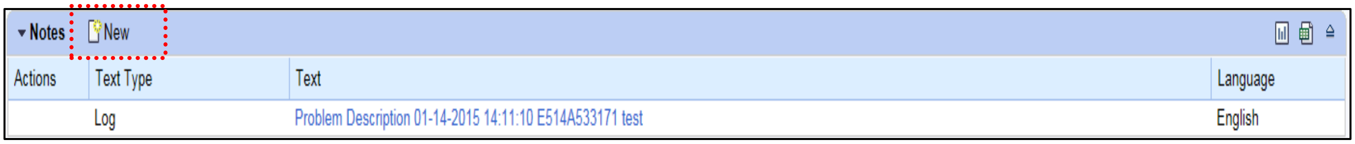
Option 1 (Log)

Note: The language should remain English

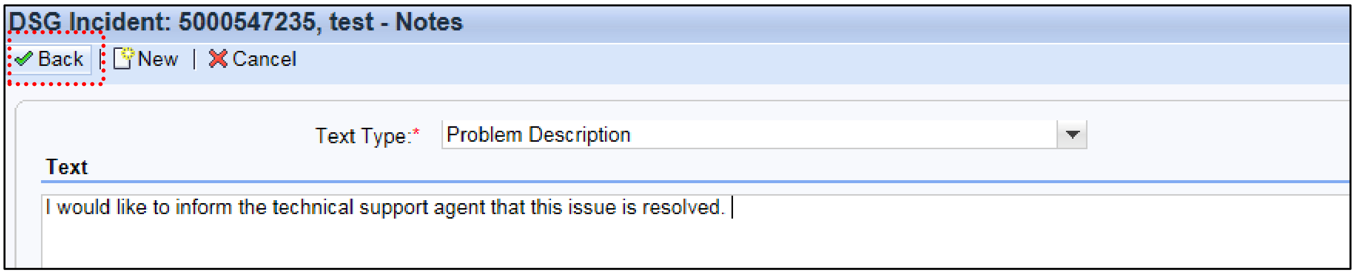
The user will type in the box their updates/request for update/ escalation. Upon completion of their notes the user will select the save button.



Option 2 (Notes)

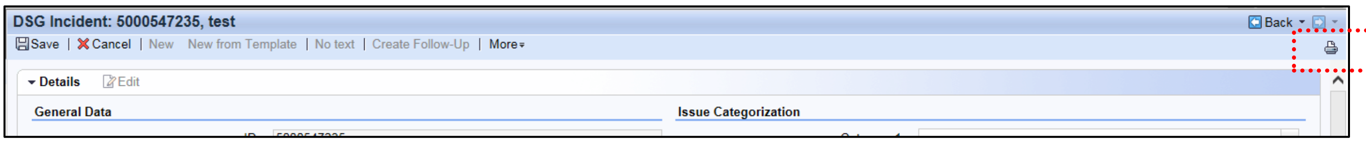


The user will select **"New"** and type in the box their updates/request for update/ escalation. Upon completion of their notes the user will select the back button and then the **"Save"** button.

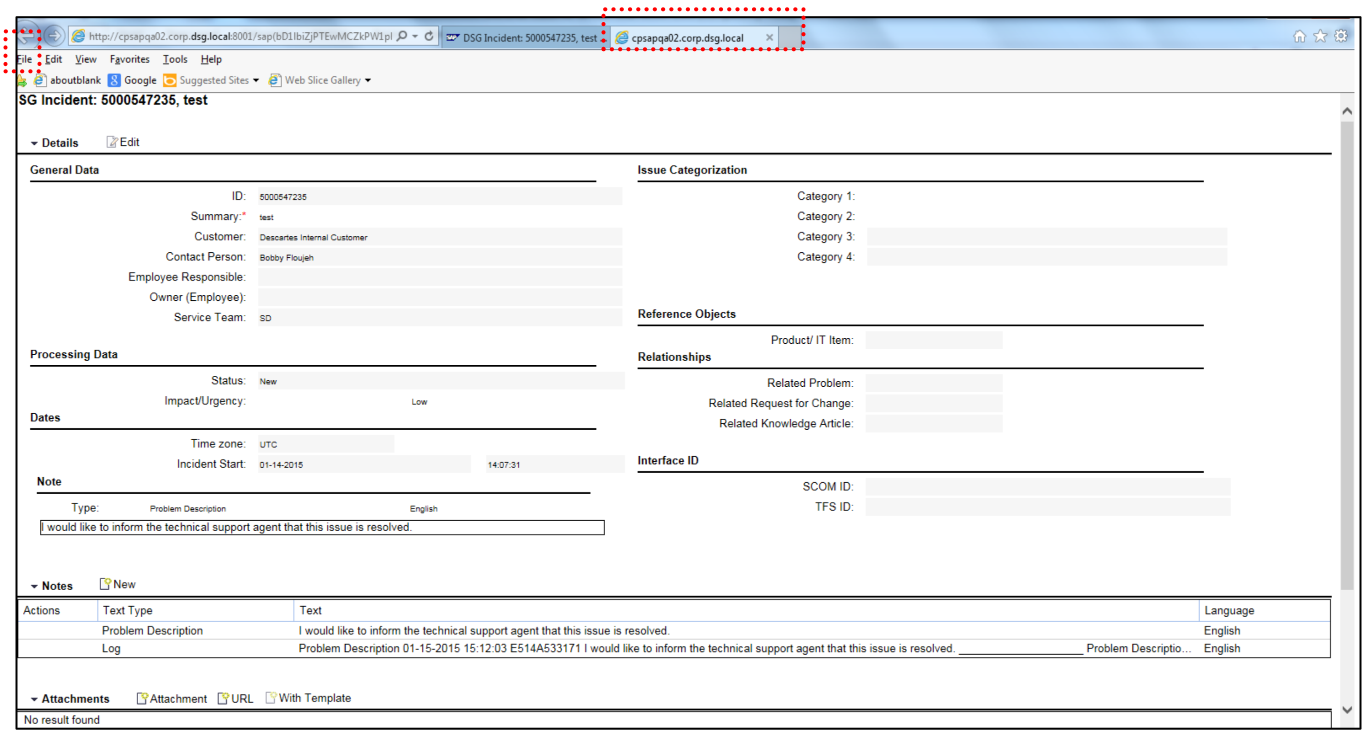


Printing the Content of Service Incidents

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



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



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

Email Transactions

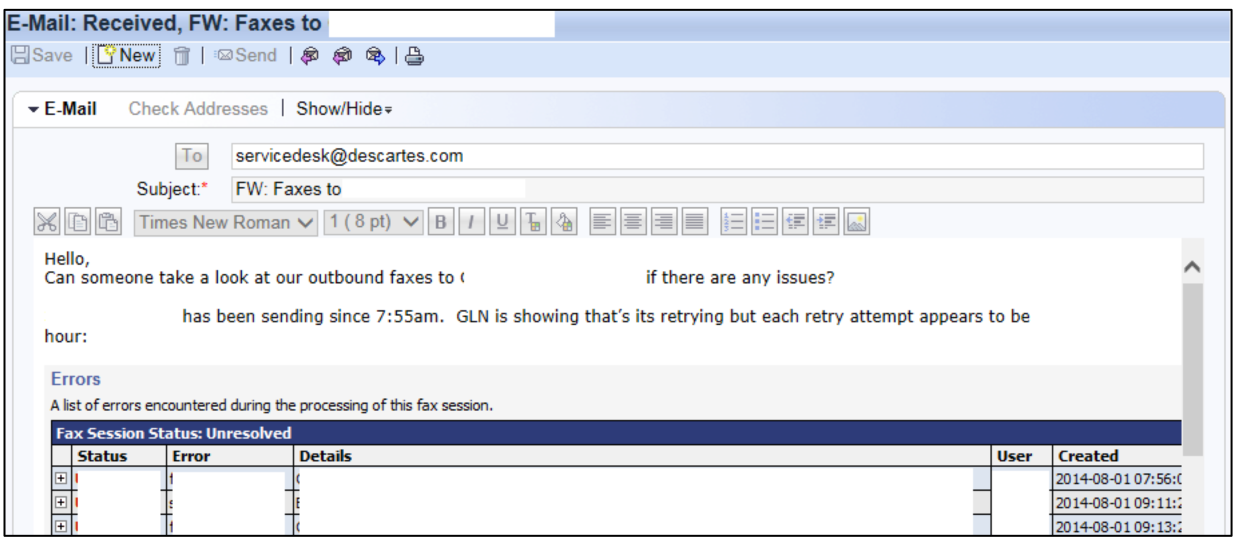
The user has the ability to view all email transaction history that is associated with the incident. Emails get associated to incidents when the emails are sent to servicedesk@descartes.com and/or sdresponse@descartes.com. When a user is creating an incident via email they are to use servicedesk@descartes.com 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.



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 <u>prior</u> 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. *No email is sent to the client when this status is used.*	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 3rd 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 3rd 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 3rd 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 automated email is sent upon saving of the incident.	Yes
Closed Unresolved	The incident was closed but no resolution was found. After selecting this status, an automated email is sent upon saving of the incident.	Yes
Closed No Feedback	The incident was closed because we received no response from the client. *No email is sent to the client when this status is used.*	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