

# Steady State Boarding Process

**Presenter: IBM Boarding Book Process Team**

**Date: November 18, 2009**

**1-877-GTA-3233**

Consolidated Service Desk

**1-877-opinGTA**

Your Opinion Counts

# Agenda

## Instructions for Super User Access To:

- Service Catalog
- Service Desk
- GSMRT
- Chargeback
- GETS Portal

# Super User Receives Request to have access to Service Catalog, Service Desk, GSMRT, or Chargeback



← Logout

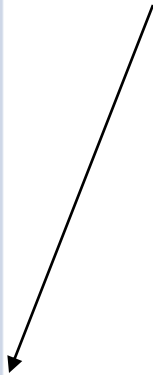
OrderNow!

View cart

Shop catalog

- Quick shop
- Search catalog
- PC Equipment and Services/IMAC
- Telecommunication and Services
- New Site
- System or Application Access
- Solution Request
- Office Move
- Conferencing Services
- Employee Move
- New Hire/Employee Separation
- Super User Access Only

- Click on Super User Access Only to start the boarding process



# Credentials

## Boarding Book Template

Organization	Business level
State of Georgia (GAIT)	State of Georgia (GAIT) - Test

### Response entry

- \* First Name
- \* Last Name
- \* Phone Number
- \* Email Address
- \* GETS Portal Pre-Registration User ID

### GSMRT

- Access to GSMRT Reports
- Reporting Agency
- Access to GSMRT Chargeback Reports
- User Group (8 characters)
- If User Groups have not been defined for your Agency, the user will be able to see all data for your Agency.
- Access to GTA SMO Reports

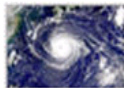
# Access Request Type

- OrderNow!
- View cart
- Shop catalog
  - Quick shop
  - Search catalog
  - PC Equipment and Services/IMAC
  - Telecommunication and Services
  - New Site
  - System or Application Access
  - Solution Request
  - Office Move
  - Conferencing Services
  - Employee Move
  - New Hire/Employee Separation
  - Super User Access Only
- Feedback
- Request
- Status
- Approval
- Reports
- Quote
- Notes
- Administration
- My profile
- Application help

main categories - Page help

## Super User Access Only

Organization	Business level	Country
State of Georgia (GAIT)	State of Georgia (GAIT) - Test	United States

 This Category is only to be selected by Super Users. Thank you.

For selected items: Add to cart Cancel Sort a la carte products by:  Go

### a la carte products

Product short description	Product extended description	Price	Action
<input type="checkbox"/> <b>Remove Access to Reports</b>	Agency Super User requests removal of access to GSMRT reporting tool for other agency user - also requires access to GETS Portal and Self Registering by the user. Mfr part #: SERVREQ10	0.00 USD	<span>Add to cart</span>
<input type="checkbox"/> <b>Change Access to Reports</b>	Agency Super User requests changing access to GSMRT reporting tool for other agency user - also requires access to GETS Portal and Self Registering by the user. Mfr part #: SERVREQ11	0.00 USD	<span>Add to cart</span>
<input type="checkbox"/> <b>Request Access to Service Desk</b>	Agency Super User requests access to Service Desk tool. Mfr part #: SERVREQ3	0.00 USD	<span>Add to cart</span>
<input type="checkbox"/> <b>Remove Access to Service Desk</b>	Agency Super User requests removal of access to Service Desk tool. Mfr part #: SERVREQ4	0.00 USD	<span>Add to cart</span>
<input type="checkbox"/> <b>Change Access to Service Desk</b>	Agency Super User requests changing access to Service Desk tool. Mfr part #: SERVREQ5	0.00 USD	<span>Add to cart</span>

- Check the appropriate box (i.e., request, remove, or change access) for the appropriate tool (Reports, Service Desk, or Service Catalog)

# Request Access

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**Request Access to Reports**

- Request Access to Reports  
Mfr part #: SERVREQ9  
→ [Service information needed](#)

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**Request Access to Service Desk**

- Request Access to Service Desk  
Mfr part #: SERVREQ3  
→ [Service information needed](#)

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**Request Access to Service Catalog**

- Request Access to Service Catalog  
Mfr part #: SERVREQ6  
→ [Service information needed](#)
- 

- Click on the “**Service Information Needed**” link



# Reports Access

## Boarding Book Template

Organization	Business level
State of Georgia (GAIT)	State of Georgia (GAIT) - Test

**Response entry**

**GSMRT**

**Access to GSMRT Reports**

**2nd Reporting Agency (if applicable)**

**Access to GSMRT Chargeback Reports**

**User Group (8 characters)**  
 If User Groups have not been defined for your Agency, the user will be able to see all data for your Agency.

Select one

- Administrative Office of the Courts
- Department of Community Health - Public Health
- Dept of Administrative Services
- Dept of Agriculture
- Dept of Behavioral Health and Dev Disabilities
- Dept of Community Affairs
- Dept of Community Health
- Dept of Corrections
- Dept of Drivers Services
- Dept of Education
- Dept of Human Resources
- Dept of Insurance
- Dept of Interior
- Dept of Juvenile Justice
- Dept of Labor
- Dept of Law
- Dept of Natural Resources
- Dept of Public Safety
- Dept of Revenue
- Dept of Transportation
- Employees Retirement System of Georgia
- Georgia Aviation Authority
- Georgia Building Authority
- Georgia Bureau of Investigation
- Georgia Forestry Commission
- Georgia General Assembly
- Georgia Judicial Administrative
- Georgia Technology Authority
- Governor's Office of Consumer Affairs

- Under GSMRT section, check this box for non-Chargeback reports for agency (this will be the agency associated with individual being provisioned)
- If a second agency is required select using this drop down
- Fill in User Group, if applicable

# Service Desk Access

## Boarding Book Template

Organization	Business level
State of Georgia (GAIT)	State of Georgia (GAIT) - Test

Response entry	
* First Name	<input type="text"/>
* Last Name	<input type="text"/>
* Phone Number	<input type="text"/>
* Email Address	<input type="text"/>
* GETS Portal Pre-Registration User ID	<input type="text"/>

Service Desk	
<b>Customer Resolver</b> Add your workgroup. By default the user will have authority to create Service Requests, Incidents, Problems and Changes for their Agency.	<input type="checkbox"/>
<b>Work Group</b>	<input type="text"/>
<b>Self-Service User</b> Can create a Service Request to report an issue to the Help Desk	<input type="checkbox"/>
<b>Global Access To View Tickets</b> This will give you the ability to (read only) access in order to view tickets in Maximo across all Agencies	<input type="checkbox"/>
<b>Global Change Record Approval Rights</b> This will give you the ability to Approve Change Requests (across all Agencies) within Maximo assigned to your as an Individual	<input type="checkbox"/>

- Fill in the mandatory fields (\*)
- Under Service Desk section, check the appropriate box to reflect access requested
- Add appropriate work group user would need access to if Customer Resolver is chosen for access.



# Service Catalog Access

## Boarding Book Template

Organization	Business level
State of Georgia (GAIT)	State of Georgia (GAIT) - Test

Response entry	
* First Name	<input type="text"/>
* Last Name	<input type="text"/>
* Phone Number	<input type="text"/>
* Email Address	<input type="text"/>
* GETS Portal Pre-Registration User ID	<input type="text"/>

Services Catalog Access	
Access to Place Requests	<input type="checkbox"/>
Access to Approve Requests	<input type="checkbox"/>
Approval Title	<input type="text"/>
Approval Chain	<input type="text"/>
Ability to Browse Only	<input type="checkbox"/>

- Fill in the mandatory fields (\*)
- Under Services Catalog section, check the appropriate box to reflect access requested
- Approve Request, need to enter the Approval Title and Approval Chain this user will be associated to.

# Service Request Process

- **Continue entering request as if placing an order and fill in the appropriate fields.**
- **Choose the appropriate agency and agency code and fill in the remainder of the References section as you have for orders.**
- **Choose the appropriate approval chain**
- **Click OrderNow to submit the request for processing**



# Service Request Access Granted Communication - PORTAL

- Here are your login credentials for the GETS Portal.

**GETS Portal URL:** <https://www.ibm.com/services/connection>  
**Your Login ID:**

Your ID is case sensitive and must be typed exactly as shown above on the Portal sign in page  
Your password was created by you when you registered for your ID. It is known only by you.  
If you do not know your password, select the 'Forgot your password' link on the Portal sign in page

**Notes on accessing GETS Portal Services on the GETS Portal:**

- o If you have been given access to financial (invoice/bill) reports, you will see a link on bottom right of the GETS Portal screen to 'Chargeback'; no additional password is needed.
- o If you have been given access to a service module (Service Catalog or Maximo), you will see the link on bottom right of GETS Portal screen; use the Password that was mailed to you for each module.

(Note: for Service Catalog, use your OrderNow password.)

- o If you need access to a module that you do not have, see your agency GTA representative/super user.

Thank you,  
The IBM Services Connection Team

# Service Request Access Granted Communication – Service Catalog



\*\*\*\*\*  
\* **DO NOT RESPOND TO THE SERVICE MACHINE THAT GENERATED THIS NOTE** \*  
\*\*\*\*\*

OrderNow! Logon ID (case sensitive): xxxxx  
OrderNow! Password (case sensitive): xxxxx

The GETS Portal website address is:  
<https://www.ibm.com/services/connection>

## TO ACCESS THE ORDERNOW! "SERVICES CATALOG":

- 1 Log on to the GETS Portal website at URL above. \*
2. Click on the "Services Catalog" link.
3. Sign into the OrderNow! "Services Catalog" using the case-sensitive OrderNow! Logon ID and Password found in this email.
4. On first entry to OrderNow!, you will be prompted to change your password.
5. Please remember to exit OrderNow! by clicking LOGOUT.

\* If you do not have access to the GETS Portal, be sure that you have pre-registered (go to <https://www.ibm.com/services/connection> and select the "Register" link) and that your name has been submitted by your agency in a Boarding Book spreadsheet. You will receive a separate email notification for the Portal and will have a separate GETS Portal User ID and Password. For complete registration instructions, go the GTA website <http://gta.georgia.gov> and click "GAIT Customer Training."

If you have any questions, please contact your agency representative (Super User/Telecomm Coordinator) or the GTA IBM Help Desk at (877) GTA-3233 (482-3233).

You will be notified of requests or quotes pending your approval via e-mail. This email will contain instructions on how to approve a request.

## INSTRUCTIONS TO SET UP A DELEGATE:

If you are going to be out of the office, please set up a delegate to approve requests in your absence. You can setup a delegate approver in OrderNow!, by going to APPROVAL, then click on Delegate Approval (located in the blue navigator), choose your delegate approver from the dropdown list, and click ADD.If your backup is not available on the approver list, send a note with your delegates name, phone number, and internet address to [clihelp@us.ibm.com](mailto:clihelp@us.ibm.com).

## INSTRUCTIONS TO CHANGE BUSINESS LEVELS:

When you login, you will be in your default business level. To change business levels, click MY PROFILE in the blue navigator on the left. Then click CHANGE MY BUSINESS LEVEL (in blue navigator or under Actions on the page). From the next screen, click SELECT to the right of the business level you wish to enter. LOGGED IN will appear to the right of your current business level.

# Service Request Access Granted Communication – Service Catalog cont'd



- **IF YOU GET THE ERROR: INCORRECT ID**  
This problem is usually related to usage of firewall software. IBM currently uses Symantec Client Firewall. Please follow these steps:  
Double-click the Symantec Client Firewall icon in your system tray.  
In Status & Settings:
  - Privacy Control should be OFF
  - Ad Blocking should be OFF
- THE FOLLOWING ARE ALL OF THE POSSIBLE STATUSES FOR A REQUEST:**
  - CANCELED** - The request is terminated by the system user or an approver.
  - IN PROGRESS** - The request is incomplete, but has been saved. It can be edited at a later date.
  - PENDING** - The request is complete and awaits approval.
  - REJECTED** - The request is rejected by an approver.
  - APPROVED** - The request is final approved. (If approval is not required, the request is immediately given a status of Approved and is sent to IBM for processing.)
  - MAILED** - The request is sent from OrderNow! to IBM.
  - ORDER OPEN** - The request is received by IBM (and is now called an order), but no order processing has begun.
  - ORDER CANCELED** - The order is terminated. No PO was created.
  - PO CANCELED** - A PO has been created and then canceled. It will not be reopened.
  - PO REJECTED** - A PO has been created and rejected. It can be reopened.
  - PO ON HOLD** - A PO has been created and put on hold to be sent to the vendor at a later date.
  - PARTIALLY SOURCED** - A PO was created, but not all line items and/or quantities have been added to the PO. No ship dates are noted and no invoices have been created.
  - SOURCED** - A PO was created and all line items and quantities were added to the PO. No ship dates are noted and no invoices have been created.
  - PARTIALLY SHIPPED** - A PO was created with line items and quantities partially sourced or sourced and assets created. Invoice reconciliation may or may not have occurred, but the Actual Ship Date has been entered into Asset Information for some, but not all the items on the PO.
  - SHIPPED** - A PO was created with all line items and quantities sourced and assets created. The Actual Ship Date has been entered for all of the assets.
  - ACQUISITION COMPLETE** - Items are fully shipped and received. The original document or a faxed document has been signed and accepted. The order is now closed.

If you have any questions or problems, feel free to email us at [clihelp@us.ibm.com](mailto:clihelp@us.ibm.com).

Thank You!  
GOS Application Support  
Global Ordering Services  
IBM Global Services

1-800-543-9281 Option 2, Option 2 (Toll Free from Australia, Bratislava, Canada, China, Czech Republic, Denmark, France, Germany, Italy, Netherlands, Sweden, Switzerland, UK, US)  
1-630-568-2910, Option 2, Option 2 (International Direct Dial)  
958-4546 (IBM Tie Line)



# Service Request Access Granted Communication – Service Desk

- Your id and temporary password for access to GTA Service Desk (Maximo) is below. You will be prompted to change your password upon initial access to a permanent password.
- For password resets or id related issues, please contact the GTA Service Desk at:  
1-877-GTA-3233 (1-877-482-3233)
- Login id:
- Temporary password:

# Service Request Access Granted Communication – GSMRT / Chargeback

- You have been established in the GSMRT system to be able to view invoice reports for your agency as requested. Once you have registered in the GETS Portal and have received your notification of your GETS Portal access, you will be able to view invoice reports. For more information on the GETS Portal go to GTA transformation page <http://gta.georgia.gov/transformation> for 'GETS Portal Registration Instructions.
- Once you open the Home page of the GETS Portal, there will be a link named “Chargeback” on the right hand side of the GETS Portal page. No additional password is needed to view these reports.
- Click on the “Chargeback” link, you will get another link named “Chargeback Reports”. Select the report you want to view and you will be presented the parameters screen.
- The first box is the Account Code Level. This allows you to view the reports at different levels. Basically for agencies, you would view at the 10 length to view at the agency level and at the 35 length to view at the lowest level of the Cost Center (In the old Telecom billing system PRISM, this would be the “Ship To” number and in the old Computer billing system RABS, this would be the “Project” number – based on the length of the number in PRISM or RABS with zeroes added to the front of the number to have a total of 15 characters).
- The next two boxes are the Starting Account Code and Ending Account Code– Although all account codes in the state will be listed, you will only be able to get data for your specific account code, all others will give you an error. You can either select your specific number (in both the Beginning and Ending boxes) or you can choose the first number on the Starting Account Code and on the Ending Account Code, the last number and it will return only the codes you are allowed to view.
- To begin with, the drill down on the volume will not provide you any information. However, when the True Up process is complete, you should be able to start drilling down on the volume to get more information about the expenditures. You should start seeing the detail drill down around the September invoice. It depends on the resource unit as to what you will be able to view (an example is for voice ports, you will be able to see the telephone numbers associated with the ports).
- If you have any questions, please send them to the following email address:
- [chargebackadmin@gta.ga.gov](mailto:chargebackadmin@gta.ga.gov)

