



BRENNAN

People first – secure always

SELF SERVICE PORTAL STAFF MEMBER HANDBOOK

S DANGERFIELD
SEPTEMBER 2018

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VERSION	DATE	AUTHOR	DESCRIPTION
V1.0	2018-07	S Dangerfield	Initial Launch Version (New User Creation no Mobile)
V1.1	2018-07	S Dangerfield	Split Staff & Administrator into 2 separate docs
V1.2	2018-07	S Dangerfield	Added mobile KBs (hidden)
V1.3	2018-07	S Dangerfield	Added Password resets
V1.5	2018-08	B Galloway	Various grammatical improvements

INTRODUCTION

BACKGROUND TO THE SELF SERVICE PORTAL

BACKGROUND

Hi, welcome to the first edition of the self-service portal handbook. This section provides the background behind the self-service portal.

What you told us

In building the portal we gathered a lot of feedback from our customers which helped drive the design. Some, but not all, of the frequent feedback or requests were for:

- faster turnaround times with much higher accuracy & less rework
- a portal where your staff, not just IT managers, can see their tickets
- site managers to be able see all the tickets at a specific location
- faster generation of quotes and orders
- password resets that were simpler and faster
- greater visibility and control of the assets Brennan manages for you
- us to create new staff members accurately first time, every time

What are the benefits for me?

The following demonstrates some examples of how these principles will benefit you in a tangible way:

FASTER: Automated requests made through the portal will come with a 30-minute SLA for the automated portion of the request (down from 5-day SLA).

Quotes for Orders requested through the portal will be issued for commercial approval within 30minutes (down from weeks).

Approvals for online orders can be processed in minutes automatically.

ACCURACY: Automated requests use business rules to deliver things such as new staff logins. We guarantee consistency with the business rules and less on requests. This will need help you establishing the right business rules.

VISIBILITY: Your staff members can now view all their own tickets, any updates and the current progress/status of the ticket.

You will have an online asset register of all your Brennan IT managed assets.

We are introducing real-time visibility of your Brennan IT managed assets and their current performance.

We are providing a full corporate directory, so you can see and correct all your staff members, their contact details and who can logon at any time.

EASE OF USE: No separate usernames or passwords to remember, logon with your current username and password.

Create orders instantly online with no paperwork, simply request it through the portal and then approve it and a fully executable instruction will be directly in the engineers inbox.

Create new users in in one simple step and have them logon 30 minutes later.

Who should use this handbook?

Everyone who uses the Self Service Portal should use this handbook. There is an additional handbook for Administrators which covers the articles relevant to their role.

Where else can I get help?

On the portal there is a library of all the tasks and instructions in the handbook, as well as other frequently encountered problems. KB0010054 "Search the Knowledge base" shows how you can search for instructions on how to use the portal, even if you don't have a copy of this handbook.

KB0010050 – HOW TO LOGON TO THE PORTAL

KB0010050	HOW TO LOGON TO THE PORTAL
What will this article teach you to do?	This article will teach you how to logon onto the Brennan IT Self Service Portal.
What do you need to be able to use this FAQ?	<p>You will need either:</p> <p>A single-sign on Office365 account with your email address and existing Windows password</p> <p>OR</p> <p>A separate ServiceNow username and password, ideally registered with a mobile phone.</p>
When will I need this article?	You will only need the article when you are logging onto the Brennan IT Self Service Portal.
Summary of the Steps	<p>Go to the portal logon page</p> <p>Enter credentials</p> <p>Accept Online Terms</p> <p>View the Home Page</p>

Overview

The following screenshots show how you can log onto the portal. The portal supports two ways of logging on:

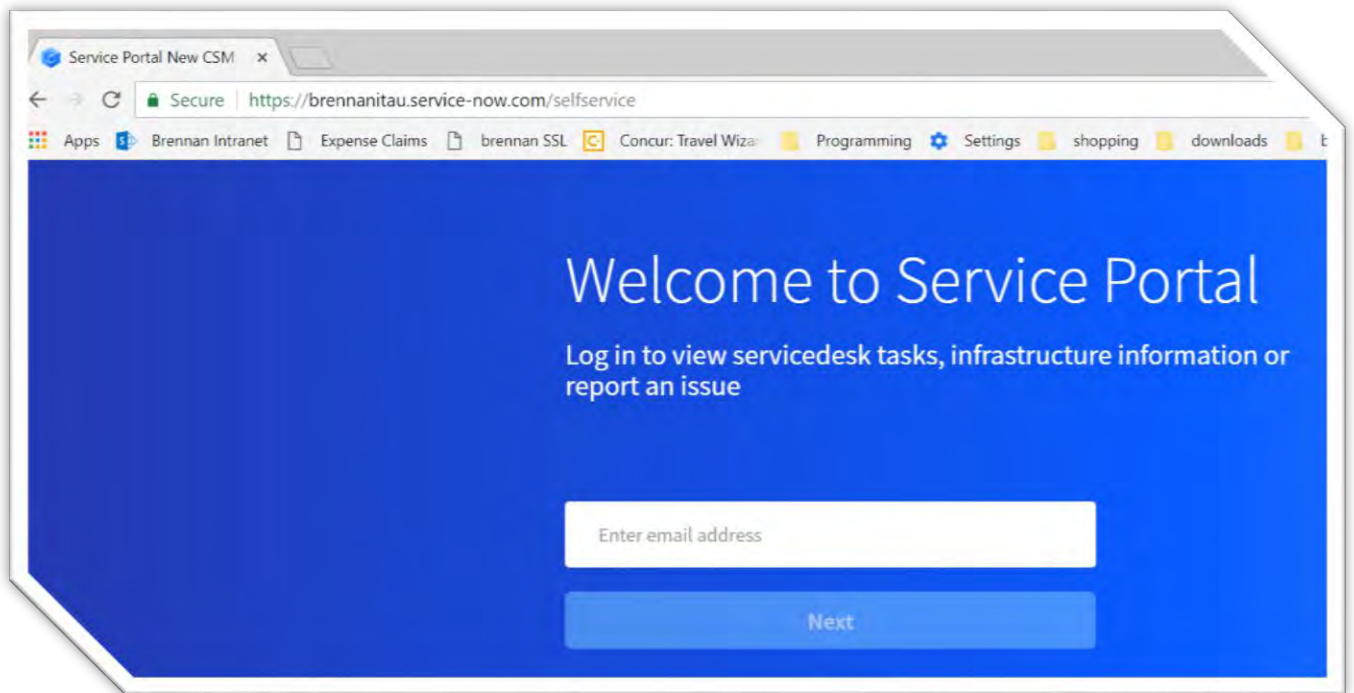
1. If you use Office 365 and your company is setup up for “Single Sign On” (75% of Brennan IT customers are setup this way) you can use your existing username and password.
2. If you take no managed Windows services – we also support logging on with a separate Portal username and password.

Step 1: Go to the portal logon page:

Go to the Self-Service portal page at the following URL:

<https://brennanitau.service-now.com/selfservice>

The following page will display:

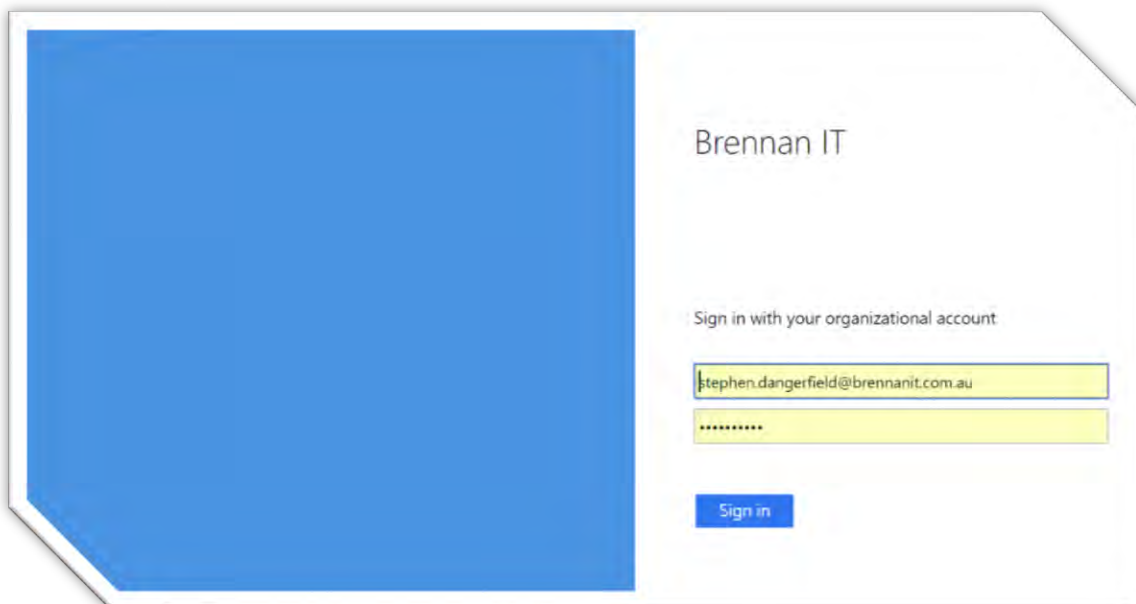


Enter your email address & Click Next

Step 2a: Enter Credentials (For Customers who use Office 365):

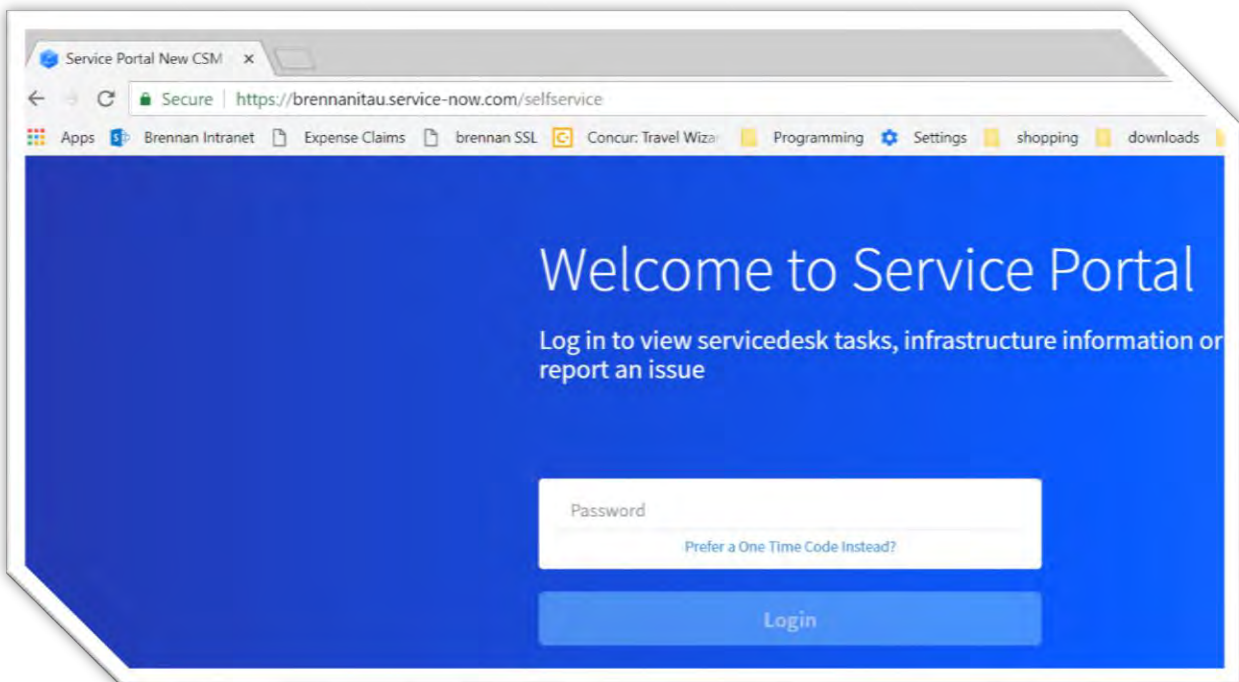
Click Next. For Single Sign on Customers, this page will redirect you to your standard Office 365 logon page. Here you can enter you existing windows username and password. The screenshot below shows Brennan IT's Office 365 logon page – yours will look branded to look like your company – not the Brennan IT example shown below.

You may also be asked to enter an SMS code if this is your first time accessing the portal.



Step 2b: Enter Credentials (For Customers who do not use Office 365):

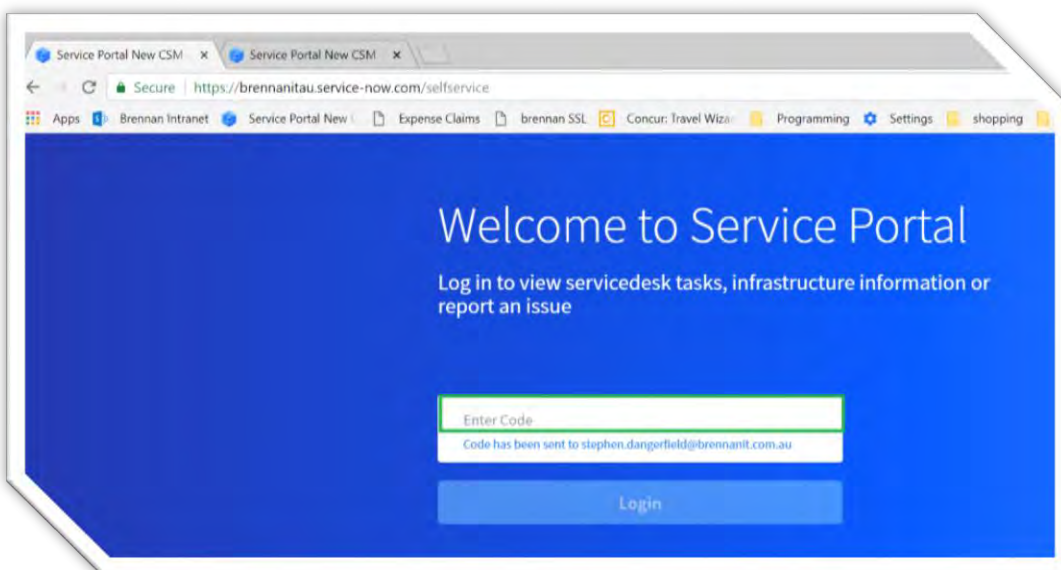
If you do not use Office 365 or are not configured for Single Sign on, you will be redirected to the traditional Username and Password screen as shown below:



Here you have two options:

- Enter your ServiceNow specific password
- OR**
- Click the One Time Code link to get a one time password sent to your email or mobile.

If you click the One Time Code the following page will show for you to enter the code:



Enter the one time 6 character code and click Next to access the portal.

Step 3: Accept Online Terms

If this is the very first time you are accessing the portal and you are a customer admin – then it will ask you to accept the online terms. This will be a page as shown below:

The screenshot shows the Brennan IT Online Ordering Portal. At the top, there is a navigation bar with the Brennan IT logo, a Knowledge Base link, My Organisation, My Tickets (with a notification icon), and a user profile for Stephen Dangerfield. The main content area contains a text box with the following text:

Please read these terms carefully before using the Brennan IT Online Ordering portal ("Online Ordering Portal").

By clicking "Accept" or by using the Online Ordering Portal you:

- Confirm that you are the authorised representative of a company/party that is a customer of one of the Brennan IT group companies listed below and defined jointly as "Brennan IT".

As a customer of Brennan IT, you have an existing:

- Service Contract with Brennan IT consisting of a Brennan Order Form, applicable Product Terms, and Master Terms and any other document incorporated into these by way of reference; and / or
- Fixed Term Contract or month to month contract with Brennan IT subject to the Standard Form of Agreement and any other document incorporated into this by way of reference; or
- Any other customer agreement with Brennan IT and any other document incorporated into this agreement by way of reference clearly specifying agreed terms between us.

The above are referred to as the "Agreement" within these Online Ordering Portal terms

- Agree to be bound by these Online Ordering Portal terms.
- Represent that you have the authority to purchase goods and services under the relevant Agreement and also the authority and right to vary any Contract or Agreement that you have with any member of the Brennan IT Group.
- Agree to the Technology Charge monthly fee of \$100.

At the bottom of the text box, there are two buttons: "Accept" (blue) and "Do Not Accept" (red).

Step 4: View the Home Page:

Upon a successful login, you will see the homepage with your name shown in the green box below.

The screenshot shows the Brennan IT Service Portal homepage. The browser address bar shows the URL: https://brennanitauat.service-now.com/selfservice. The page has a navigation bar with links to Apps, Brennan Intranet, Service Portal New, Expense Claims, brendan SSL, Concur Travel Wbs, Programming, Settings, shopping, downloads, brendan, linux, and API-Puppet. The main content area is divided into several sections:

- Make a Request:** A blue button with a green box around it, containing a user profile for Stephen Dangerfield (Head of Automation and Systems) and a "My Tickets" link.
- My Active Tickets (6):** A section with a search bar and a "Clear Filter" button.
- My Tickets (Show tickets where you are the user.):** A list of tickets, each with a status icon (exclamation mark), title, and creation time.

Ticket ID	Title	Status	Created
INC0182473	Test for handbook	Open	just now
INC0182472	This is a test for the handbook creation	Open	just now
INC0181871	Test to show on homepage	Open	25d ago
REQ0132838	TExt Restore of data	Assigned	25d ago
INC0181738	show on homepage	Open	about a month ago
INC0149037	Service now / Zeacom pop up changes	Assigned	6mo ago

Common questions and answers regarding logging onto the portal:

The following section provides common questions raised and their answers regarding new user creation:

COMMON QUESTIONS	ANSWERS
How do I know if I can use my company username and password?	<p>75% of Brennan IT customers can use their company username and password.</p> <p>Simply enter your email address, if your organisation is setup for your existing username and password, it will automatically redirect you to your company's Office 365 logon page (this is called a "Single Sign on Page").</p> <p>If you aren't setup it will take you to the ServiceNow username and password page.</p>
I am not setup for Office 365 and I have forgotten my ServiceNow username and password	<p>Either:</p> <ul style="list-style-type: none">• Use the one-time SMS/Email code <p>OR</p> <ul style="list-style-type: none">• Phone the Service Desk to reset your ServiceNow password

KB0010051 – HOW TO LOG A HELPDESK REQUEST

KB0010051	HOW TO LOG A HELPDESK REQUEST
What will this article teach you to do?	This article will teach you how to log a helpdesk ticket via the Brennan Self Service Portal
What do you need to be able to use this article?	You only need to be able to logon to the Brennan Self Service Portal (see KB0010050)
When will I need this article?	You will only need the article when you want to raise a Helpdesk request
Summary of the steps	<ul style="list-style-type: none">• Logon to the portal• Select Make a Request• Select “Report an Issue” from the Self Service Catalog• Complete the Support form• View confirmation

Overview

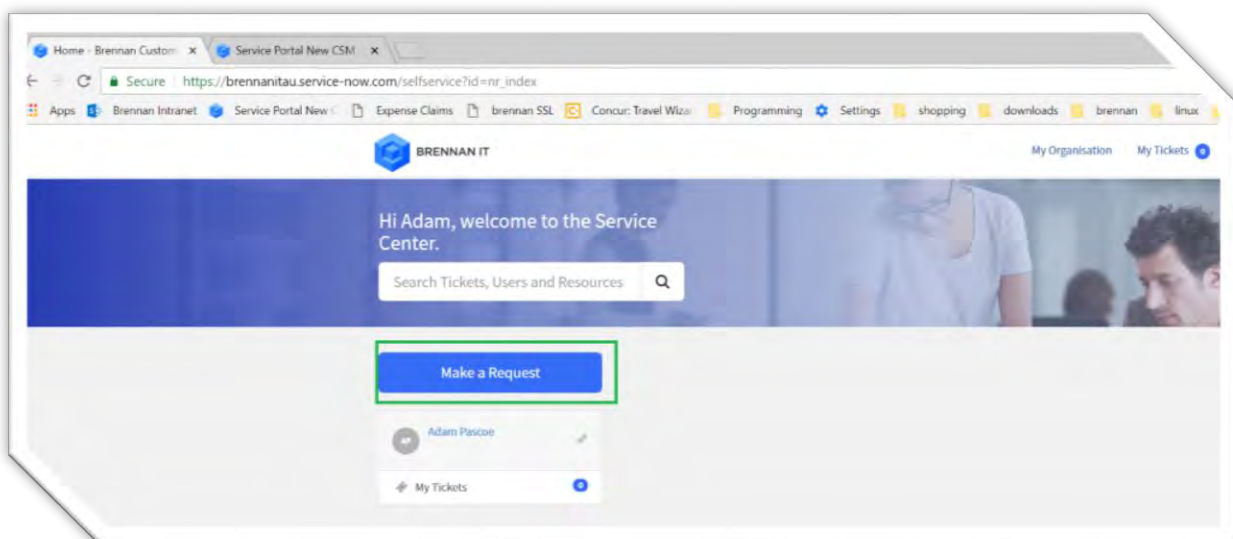
This process will allow you to log a helpdesk ticket via the Self-Service Portal.

Step 1: Logon to the portal

Follow KB0010050 to logon onto the Brennan IT Self-Service Portal

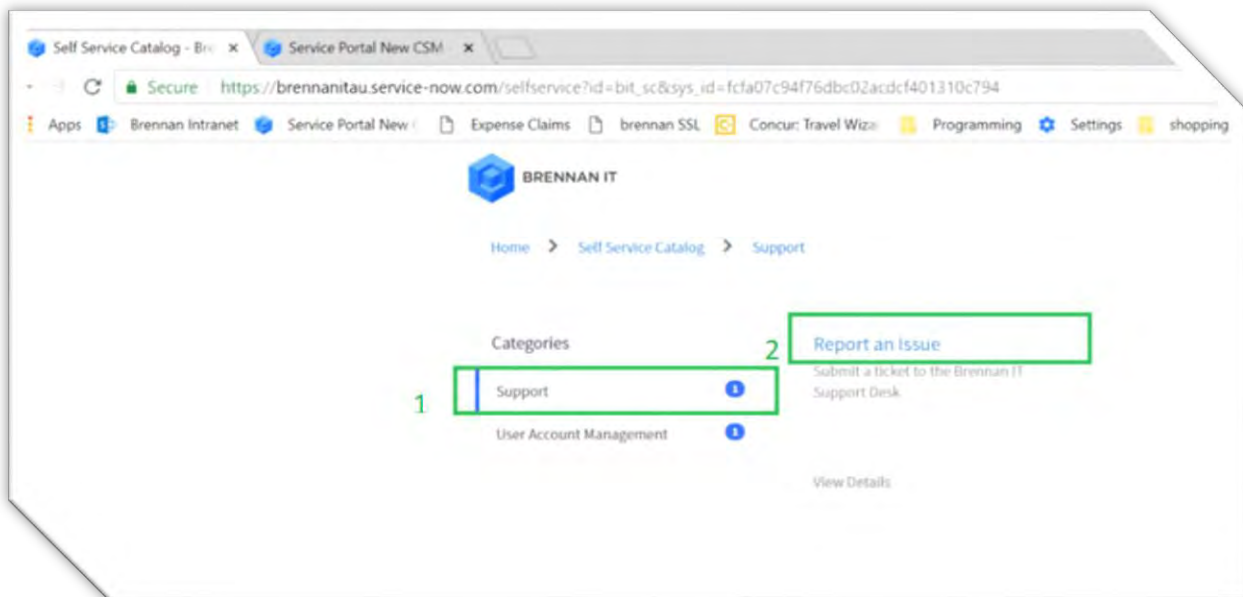
Step 2: Select “Make a Request”

Once logged on you will see your home page, from the homepage click the Make a Request button highlighted by a green box in the following screenshot.



Step 3: Select “Report an Issue” from the Self-Service Catalogue

The “Make a Request” button will take you to the Self-Service Catalogue as shown below:



From here you want to

- click the “Support” Category
- Then click the “Report an Issue” Card

These are highlighted in green in the screenshot above

Step 4: Complete the Support Form

After you click “Report an Issue” the following form will be displayed:

To complete the form:

- Complete the description field with as much information as possible
- Use Additional Information for more detail.

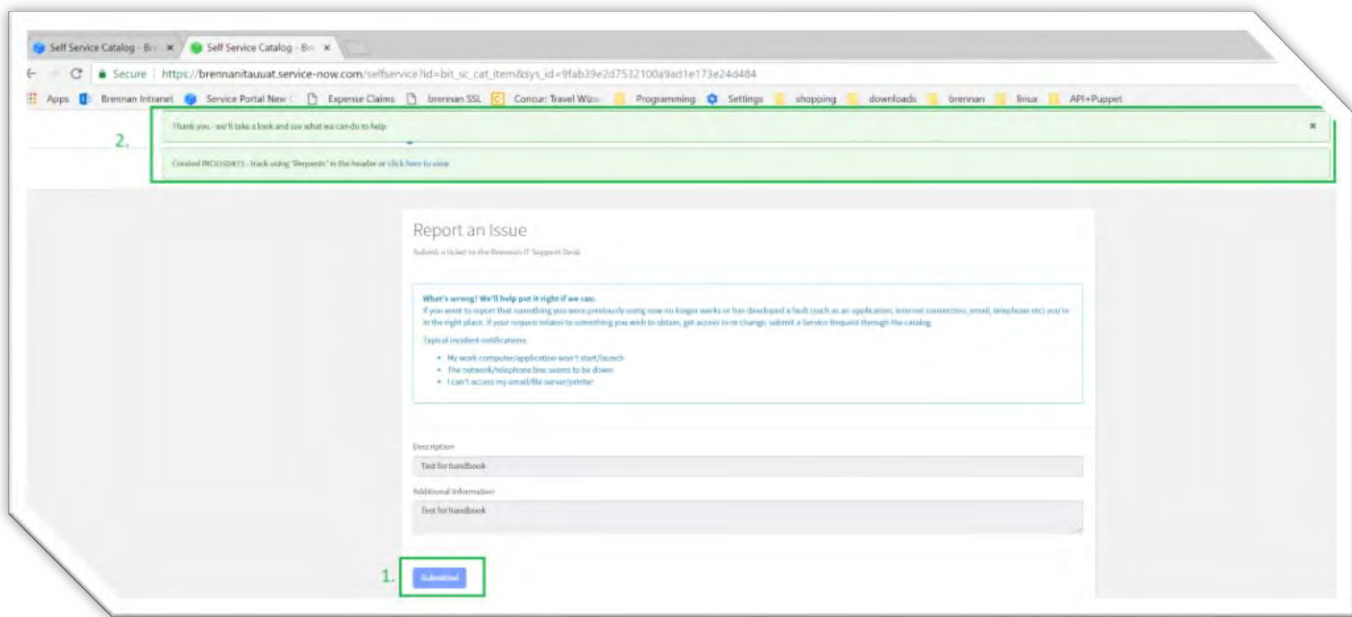
- Add any attachments (by clicking the button highlighted in green)
- Once complete - Click Submit

Note: The more information you provide (such as the time when it happened, your PC machine name and any steps done to try and fix it already), the faster the ticket will get resolved.

Likewise, if you can add any attachments such as screenshots or error messages, this will also lead to a faster resolution.

Step 5: View confirmation

After you click Submit, the button will change to say submitted (shown in green box 1 below), and if successful a green message at the top of the screen will confirm that they ticket has been created successfully (shown in green box 2 below).



Note: If you want to see the detail on the ticket you just logged, use KB0010053 – Finding my Active Tickets and KB0010053 – Understanding a Ticket.

Common questions and answers regarding logging tickets:

The following section provides common questions raised and their answers regarding new user creation:

COMMON QUESTIONS	ANSWERS
I can't see my ticket in the list	<p>If your ticket has been closed you will need to use KB00100506 – Advanced Ticket Filtering & Searching to find your closed tickets.</p> <p>If this doesn't work, phone the Service Desk.</p>

The My Tickets page shows no tickets

It is most likely that you have a saved filter applied to the list from a previous logon.

Read KB0010062 – Advanced Ticket Filtering and learn how to clear your filters

KB0010052 – FINDING & UPDATING MY ACTIVE TICKETS

KB0010052:	FINDING MY ACTIVE TICKETS
What will this article teach you to do?	This article will teach you how to search for or find tickets that you have raised that are unresolved.
What do you need to be able to use this article?	There are no pre-requisites for this FAQ other than being able to logon to the Self-Service Portal (KB0010050)
When will I need this article?	<p>You will need this if you want to check the latest updates to a ticket you have raised.</p> <p>You will need to use this FAQ if you want to update the ticket description or to add comments.</p>
Summary of the steps:	<ul style="list-style-type: none">• Logon to the Portal• Goto My Tickets• Click the Ticket you want the detail on.

Overview

Step 1: Logon to the Portal

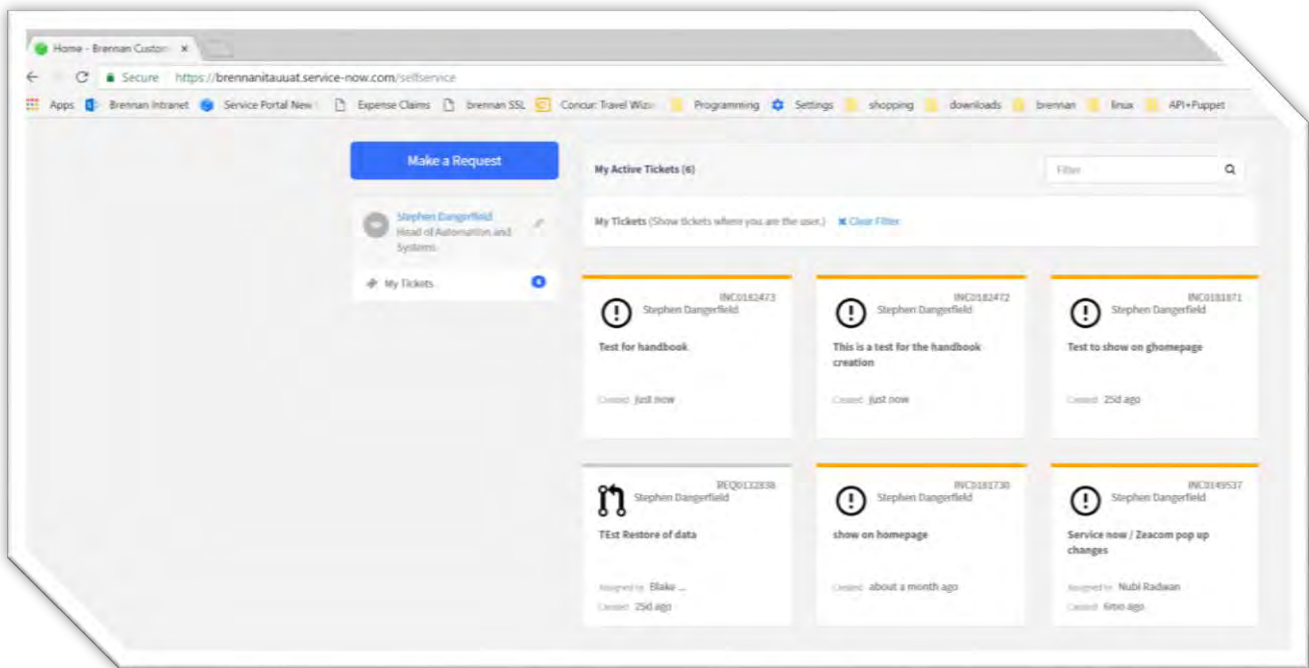
Follow the Steps in KB0010050 – How to logon to the Portal, this will take you to the home page as shown below:

Step 2: Goto My Ticket

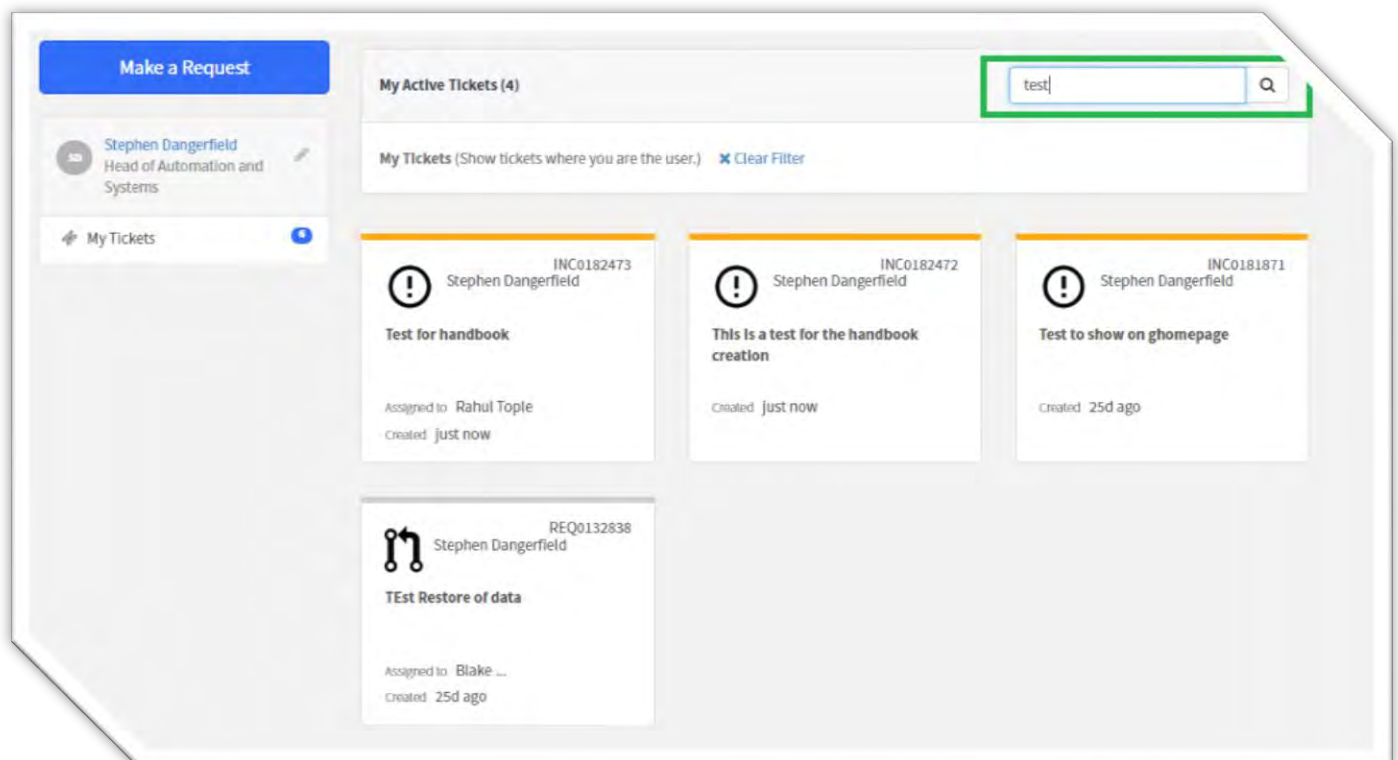
This section shows the three ways to get to your active tickets, more advanced ticket filtering and searching is available in KB0010062 – Advanced Ticket Searching

Option 1: Using the “My Active Tickets” list:

On the home logon page at the bottom is a list of current tickets called “My Active Tickets”. You can see from the screenshot below – 6 active tickets for the test user account.

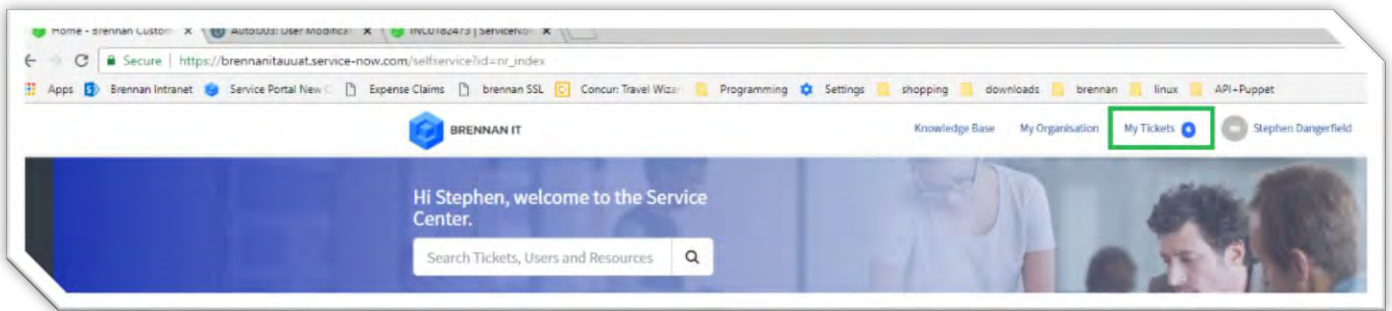


You can also filter this list of tickets using the search box on “My Active Tickets” as highlighted in green below. When we type “test” as a subject filter – it reduces to 4 active tickets:



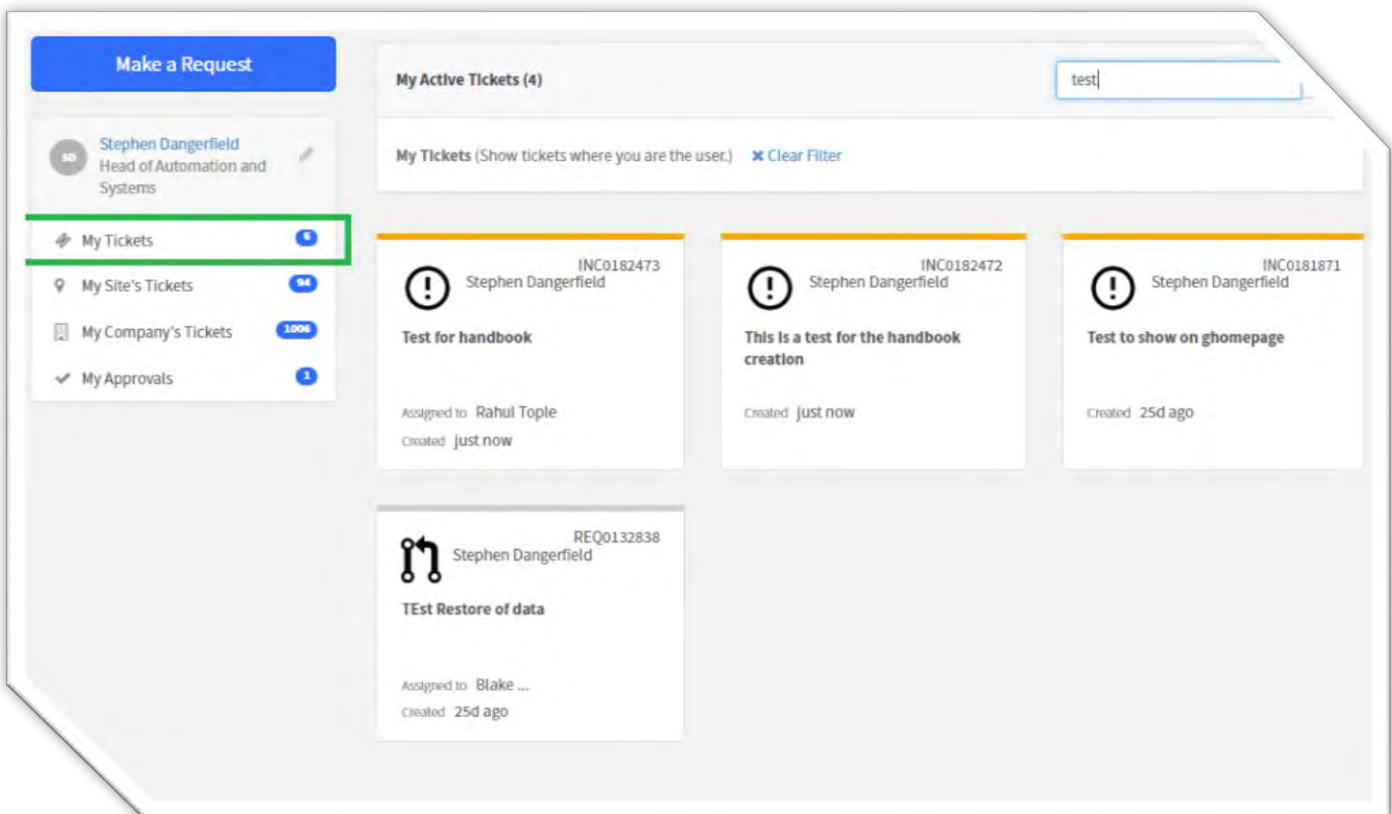
Option 2: Using the heading menu

Alternatively, you can select “My Tickets” from the heading of any Portal Page as highlighted in Green below:



Option 3: Using the My Tickets link:

Finally you can press the My Tickets link from the home page as highlighted in Menu beneath your name on the portal pages



KB0010053 – UNDERSTANDING A TICKET

KB0010053:	UNDERSTANDING A TICKET
What will this article teach you how to do?	This article will teach you how to search for or find tickets that you have raised that are unresolved.
What do you need to be able to use this article?	You will need to know how to find a ticket which you can locate using KB0010052 Finding my Active Tickets.*
When will I need this article?	<p>You will need this if you want to check the latest updates to a ticket you have raised.</p> <p>You will need this to understand any updates to a ticket.</p> <p>You will need this FAQ to add additional feedback to a ticket.</p>
Summary of the steps:	<ul style="list-style-type: none">• Find your ticket• Understanding the “Context Card” summary• View the detail• Understanding your ticket detail• View the ticket history• Updating your ticket

*If you want to find closed tickets – use KB00100506 Advanced Ticket Searching

Overview:

This section will help you to understand a helpdesk ticket's status and history from the portal rather than trying to piece it together from the email chain.

Step 1: Find your ticket:

To find your ticket we suggest you use one of the following articles:

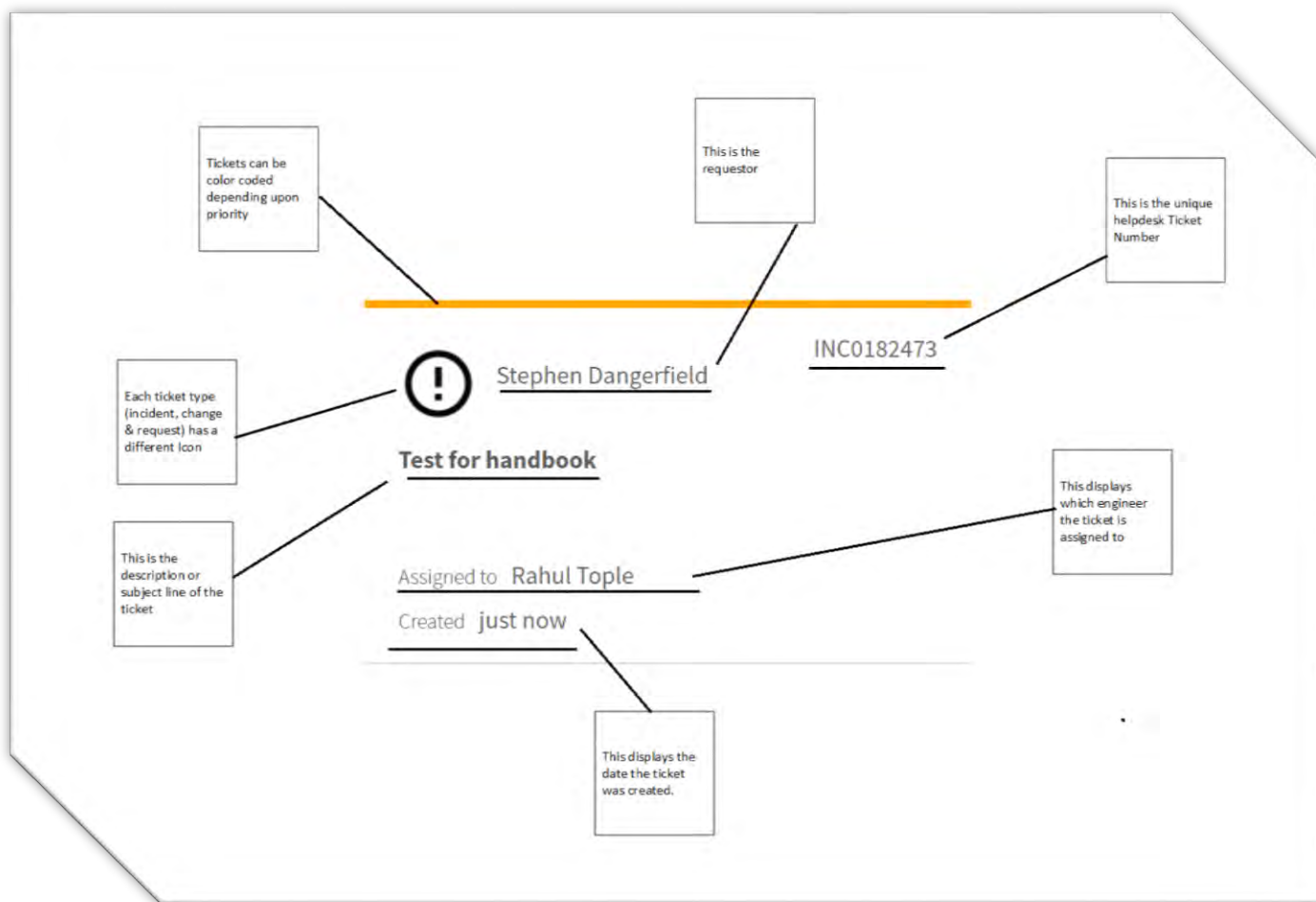
- For an active/resolved ticket: Use KB0010052 “Finding My Active Tickets”

Once you have located the ticket it will display the ticket “context card” summary which is explained below

Step 2: Understanding the “context card” summary

The Brennan IT Self-Service Portal uses a concept called “context cards” – this is a card view that displays information relevant to the card type. For tickets, it displays information relevant to the helpdesk ticket, and for infrastructure it will display things such as RAM, operating system and disk space.

The following graphic explains what each contextual piece of information is on the ticket context card:



Step 3: View the ticket detail

To view the detail of the ticket simply click the summary card for that ticket and it will take you to both the ticket detail and the ticket history page.

Step 4: Understanding your ticket detail

The following screenshot explains the ticket detail. Each field is explained in the following table:

FIELD	DETAIL	EXAMPLE VALUES
Number	This is the unique ticket number	INC0182473
Opened	The date & time the ticket was opened	2018-07-09 11:31:12
Caller	The caller who logged the ticket	Stephen Dangerfield
Updated	The date the ticket was last updated by Brennan	2018-07-09 15:09:21
Priority	The SLA Priority for this type of ticket	Nearly always 3 – Moderate
Assignment Group	The team in Brennan looking at the issue	Brennan Helpdesk

State	The current status of the ticket	In Progress, Resolved or Closed
Assigned to	The engineer working on the ticket	Rahul Tople
Category	This defines the type of ticket it is.	End User Support for staff member tickets logged via the portal
Short Description	The summary of the ticket	Test for handbook
Description	The detailed description of the ticket	As per screenshot
Activity	The History of the ticket, this is explained more in the following steps:	Activity

Screenshot of the ticket detail:

Incident: Test for handbook

Incident

Number: INC0182473

Opened: 2018-07-09 11:31:12

* Caller: Stephen Dangerfield

Updated: 2018-07-09 15:09:21

Priority: 3 - Moderate

Assignment group: Brennan Helpdesk

State(state): In Progress

Assigned to: Rahul Tople

* Category: End User Support

* Short description: Test for handbook

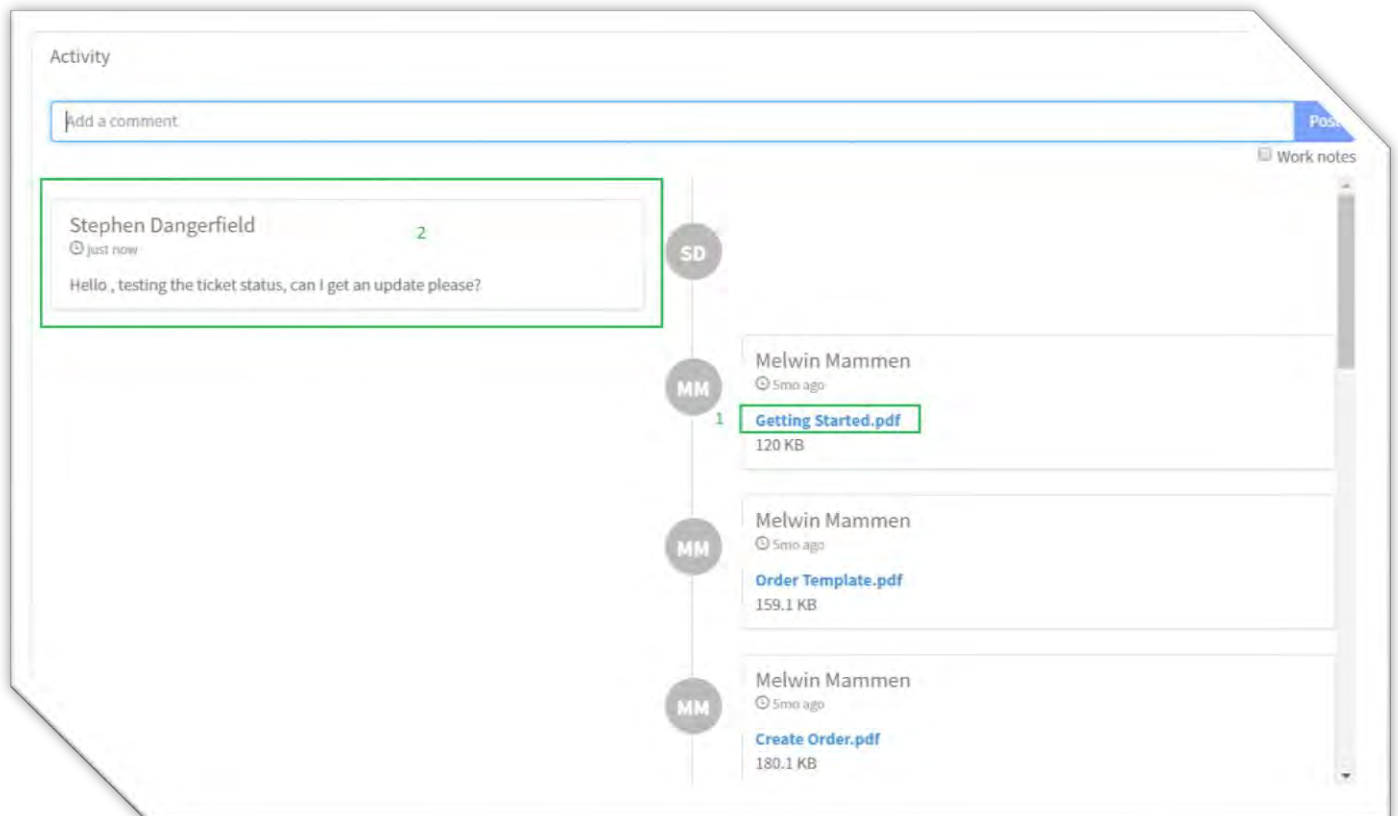
* Description: test for handbook.
 PC has stopped working and keeps going to a blue screen which says IRQ_NOT_LESS_OR_EQUAL and then the machine reboots.
 opens constantly.

Step 5: Viewing the ticket history:

Beneath the description field of the ticket there is a complete history of the ticket, it will show every comment and update since the ticket was created. Comments on the righthand pane are from Brennan IT, comments on the left hand pane are yours. This is shown in the screenshot below: Note that any attachments will also be displayed in the ticket history.

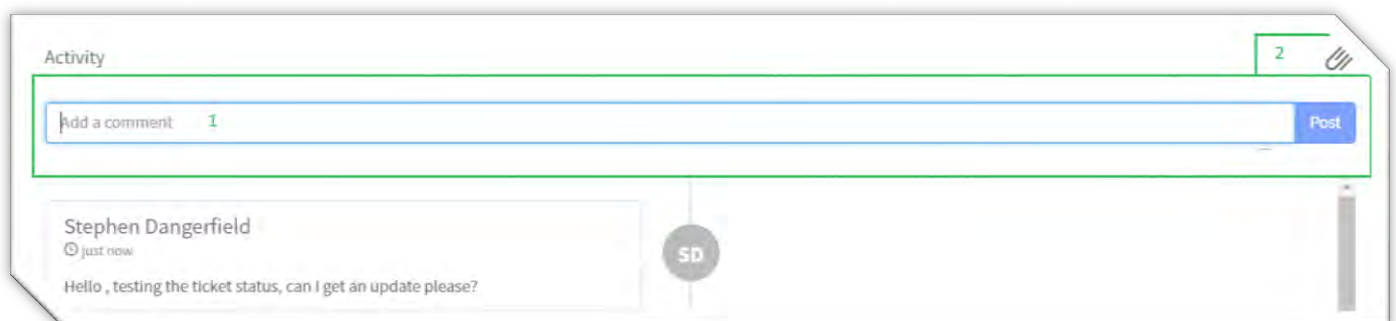
The following screenshot shows the ticket history of updates, plus the items following marked in green:

- Item 1: An example link to an attachment on the ticket history
- Item 2: An example comment/update from you on the ticket



Step 6: Updating your ticket

To update your ticket, simply add a comment (marked 1 in green below) and, if you need to, click the paperclip icon (marked 2 in green below) to attach a screenshot or file. This will go directly on the ticket and notify the currently assigned engineer.



Common questions and answers regarding understanding tickets:

The following section provides common questions raised and their answers regarding understanding tickets:

COMMON QUESTIONS	ANSWERS

KB0010054 – SEARCH FOR A KNOWLEDGE BASE ARTICLE OR VIDEO

KB0010054	SEARCH FOR A KNOWLEDGE BASE ARTICLE OR VIDEO
What will this article teach you to do?	This article will teach you how to search for or find the latest version of article and knowledge base articles on how to use the portal.
What do you need to be able to use this article?	There are no pre-requisites for this article other than being able to logon to the Self-Service Portal (KB0010050)
When will I need this article?	You will need this if you want to check the latest version of an FAQ in this document, or to search for Help when you do not have a copy of this document handy.
Summary of steps:	<ul style="list-style-type: none">• Log onto the portal• Click the Knowledge Base• Search the knowledge base

Overview:

This will help you find articles

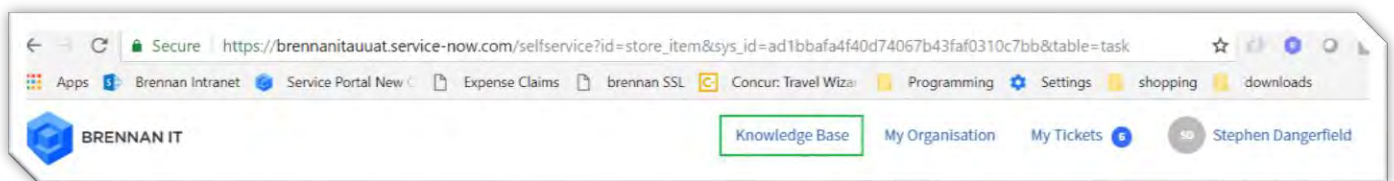
Step 1: Logon to the portal

Follow KB0010050 to logon onto the Brennan IT Self-Service Portal

Step 2: Go to the Knowledge Base

The Knowledge Base is instantly available from any page through the header menu.

This is highlighted in green in the following screenshot:



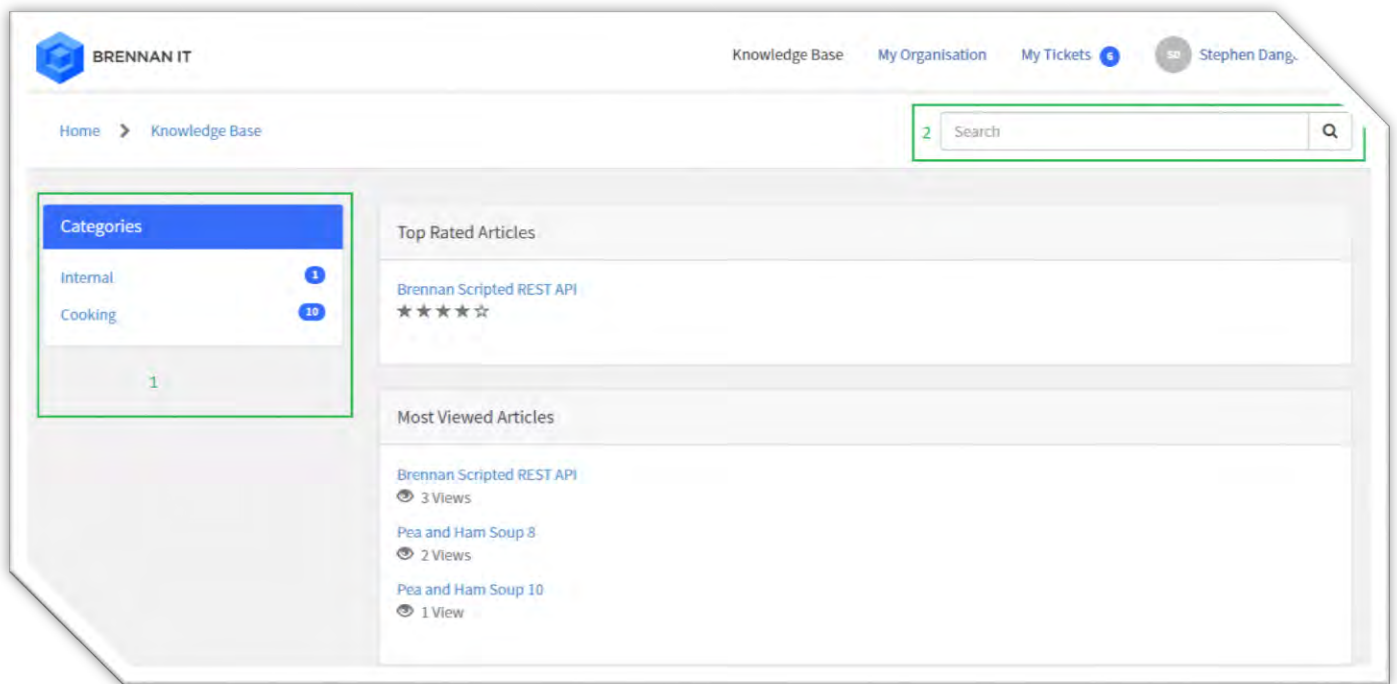
Click the Knowledge Base link to go to the Knowledge Base

3: Search the Knowledge Base

Once you click the link you will be taken to the Knowledge Base page. From this page you can search for knowledge base articles relevant to using the portal.

The following screenshot shows the knowledge base page, plus the items following marked in green:

- Item 1: The category list. All Self-Service Portal articles are “portal-FAQs”.
- Item 2: A search box where you can search by:
 - Article number (e.g. KB0010050).
 - Article Name (e.g. “How to log onto the portal”).



Common questions and answers regarding searching the Knowledge Base:

The following section provides common questions raised and their answers regarding searching the knowledgebase:

COMMON QUESTIONS	ANSWERS

KB0010055 – USING THE ORGANISATION CHART

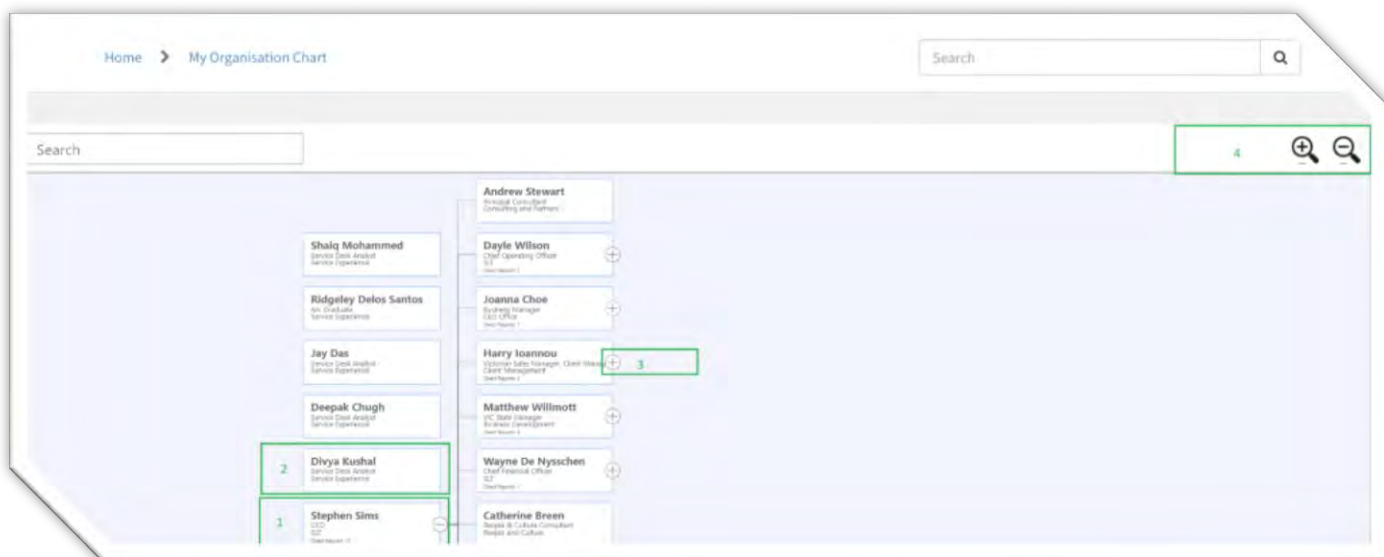
KB0010055:	USING THE ORGANISATION CHART
What will this article teach you to do?	This article will show you how to use the Organisation Chart
What do you need to be able to use this article?	You will need the name of the person, department or job title you want to find in the organisation chart
When will I need this article?	<p>You will need this if you want to use the Organisation Chart to find:</p> <ul style="list-style-type: none">• Who runs a department• Contacts details for any employee• To find out who someone's manager is• To check details for an employee's email signature.• To see which accounts are "live" in your company.
Summary of steps	<ul style="list-style-type: none">• Logon to the portal• Select Organisation Chart• Search by Name• Search by Title• View details

Overview:

This article will teach how to use the Organisation Chart.

The following screenshot shows the Organisation Chart page, plus the items following marked in green:

- Item 1: The CEO – this is the default starting display for the Org Chart
- Item 2: An example of a staff member with a missing manager, who appears "orphaned" at the top of the chart
- Item 3: Managers and Team leaders have the + plus) icon to show that this part of the org chart can be expanded to show that department / team.
- Item 4: Zoom icons which will allow you to zoom in and out so the org chart can fit on the page.

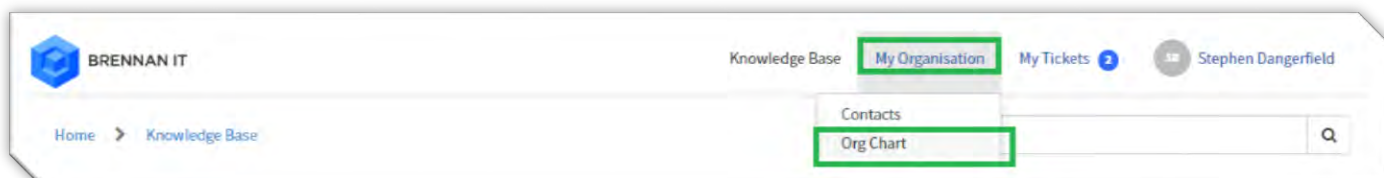


Step 1: Logon to the Portal

Follow the steps in KB0010050 – How to logon to the Self-Service Portal, this will take you to the home page.

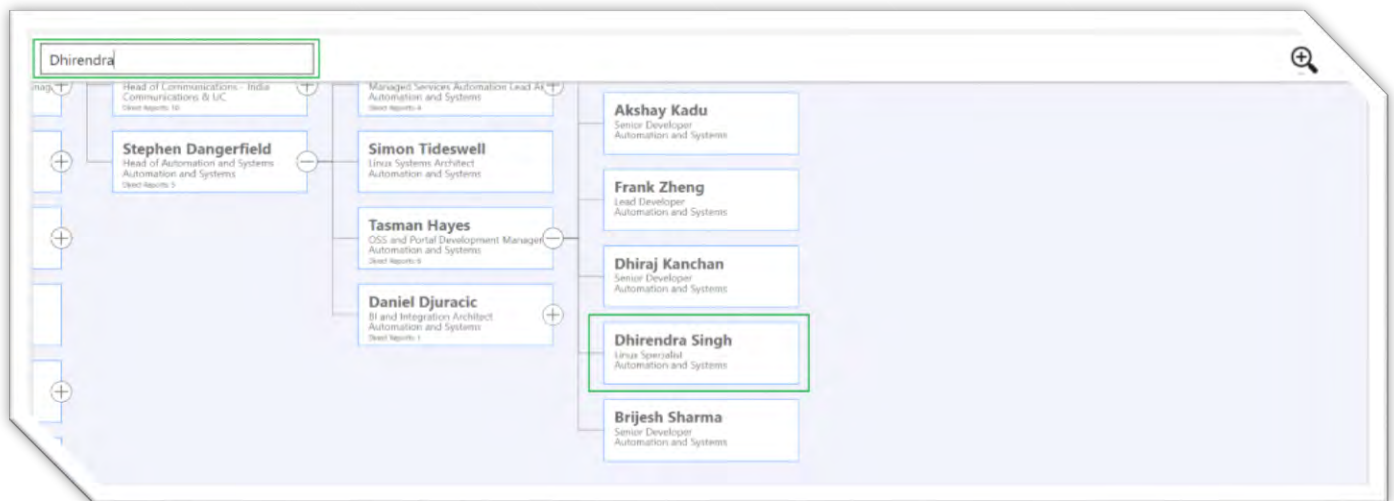
Step 2 – Select Organisation Chart

To reach the organisation chart you click the header menu “My Organisation” followed by the Menu Item: Org Chart as shown in green below:



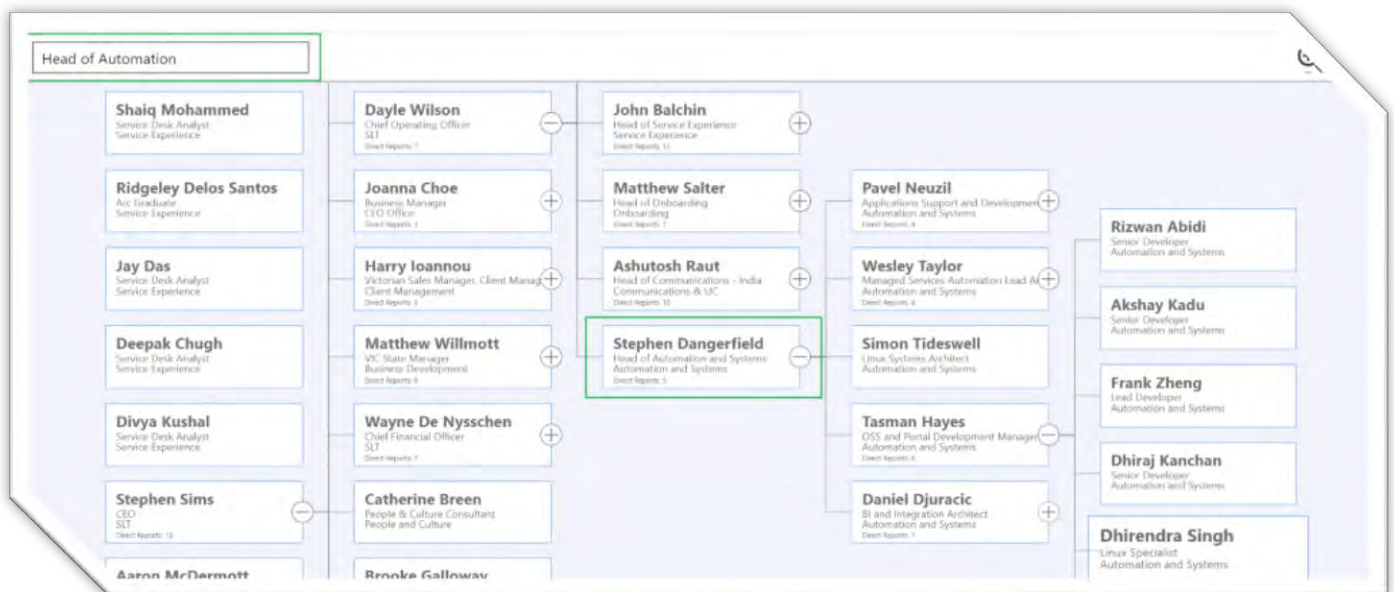
Step 3 - Search by Name

Enter a full or partial name in the green box as shown below and press return, the chart will re-centre on the first person who matches the text you enter.



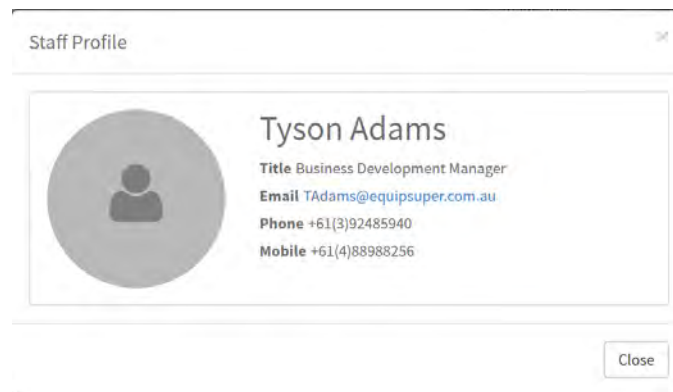
Step 3 - Search by Title

You can also use the search box to search for staff by their job title (e.g. Head of Automation & Systems in the screenshot below):



Step 4 View Contact Details

To view the phone number email and other information, click the users name



Common questions and answers regarding using the Organisation Chart:

The following section provides common questions raised and their answers regarding using the Organisation Chart:

COMMON QUESTIONS	ANSWERS
Can I get a printout of the organisation chart?	That functionality will be added in a future release
The functionality is pretty basic	This is very much an early preview, we want your feedback here as to what you want to see as we see this as a key way for you to see which users are live or disabled and an easy way to update telephone numbers and the like.
I can't find someone in my organisation chart?	The organisation chart (and Servicenow) does not display staff who do not have an email address as so many of the automations, updates and now even logons require an email address to function

KB0010056 – REQUESTING A NEW STAFF MEMBER

KB0010056	REQUESTING A NEW STAFF MEMBER
What will this article teach you to do?	This article will teach you how to request a new employee via the automated Self Service Portal.
What do you need to be able to use this article?	<p>Your company must have been enabled for User management and you must be:</p> <ul style="list-style-type: none">• A Customer Administrator• Your Customer Administrator has configured it so that any manager can request a new staff member. <p>You will need the name, dept, location, job title and contact details for the new staff member.</p>
When will I need this article?	You will need this if you need to create a new employee via the Self-Service Portal.
Summary of steps:	<ul style="list-style-type: none">• Logon to the Portal• Access Staff Management• Request a New Staff member• Enter the mandatory fields• [Optional] Select Start & Exit dates• [Optional] Select Resources• [Optional] Provide text instructions• Submit the request

Note: The job title, department & location must already exist and have the business rules assigned, if not, we need to log a separate ticket to create the business rules for the new title, department or location

Overview

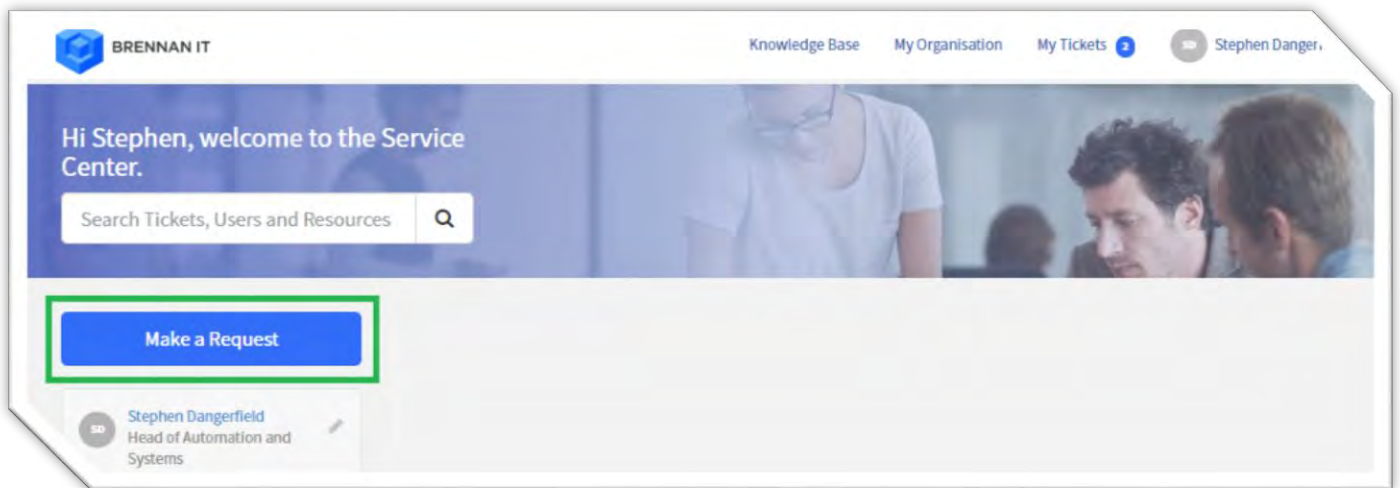
This article will explain how you can request a new staff member from the Self-Service Portal.

Step 1: Logon to the Portal

Follow the Steps in KB0010050 – How to logon to the Portal, this will take you to the home page.

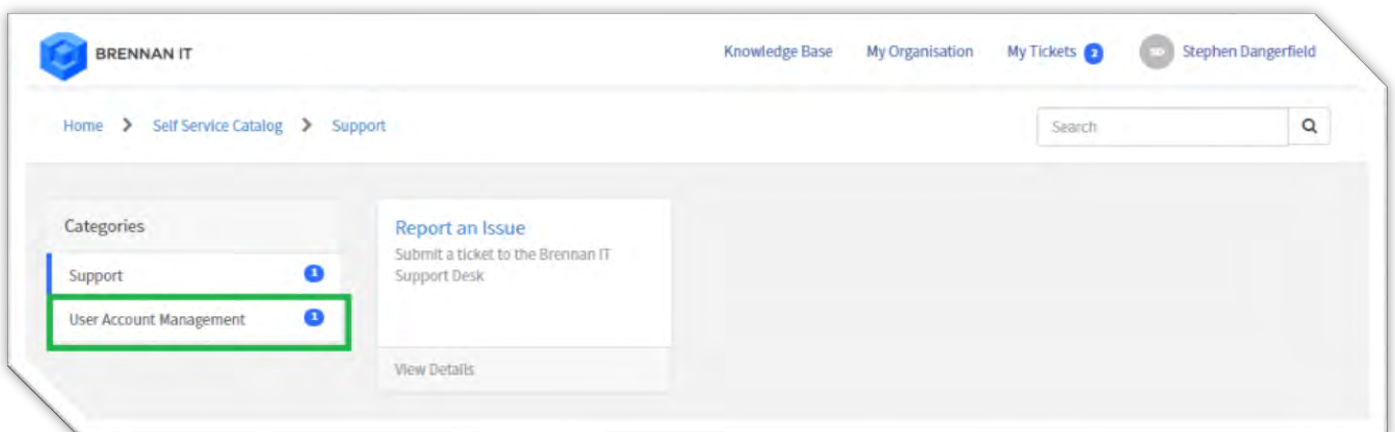
Step 2 - Access Account Management

To access account management, firstly click “Make a request” to access the service catalogue as highlighted in green in the screenshot below:



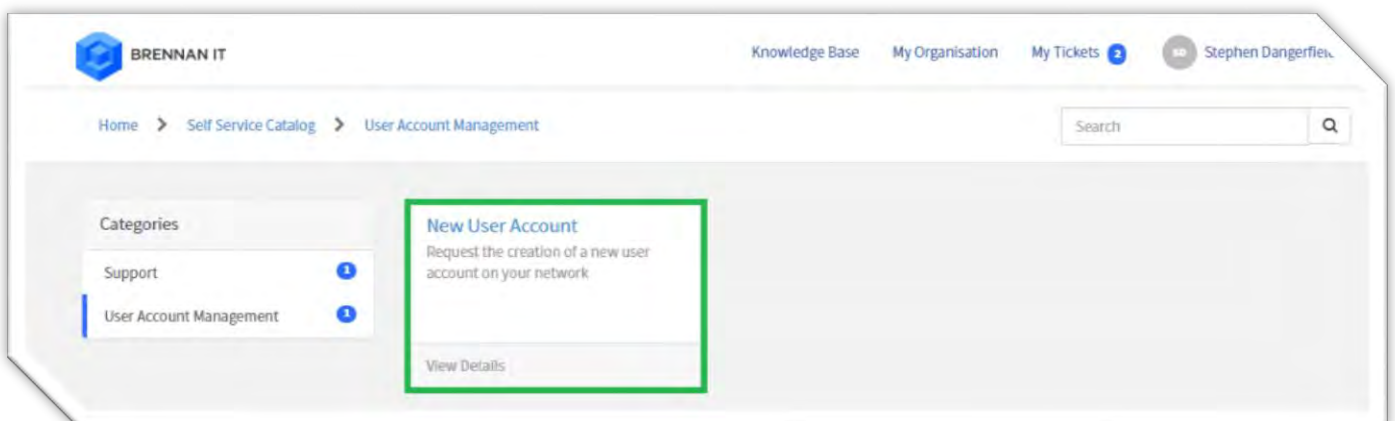
This will take you to the Service Catalogue where you will see the service catalogue as shown below. You need to click User Account management tab highlighted in green

Note: Note if you cannot see User Account Management in the Service catalogue, then you must speak to your Customer Administrator to be granted permission to request new staff members.



Step 3 - Request a New Staff member

Once you have clicked User Account Management, then click the “New User Account” card highlighted in green below, this will trigger the new staff member process.



Step 4 - Enter the mandatory fields

There is only one page of the form that is mandatory and, provided you are confident that you do not need the optional components, you can after you have completed this form, click Submit.

We need the following mandatory fields completed:

- First Name & Surname.
- Department, Location, Title & Manager (these are validated fields, so you can select from the drop downs).
- PABX Telephone Extension (or Office switchboard if unknown).

On this page we can also control if the staff member needs a mailbox created (default is yes).

Finally we have one non mandatory field: the mobile number. If we know it (or can find it out), we should enter it now to enable SMS password resets and accurate email signatures.

New User Account

This page lists all of the mandatory fields to request a user account. The following page will present you with optional fields.

* First Name: Stephen

* Last Name: Dangerfield

* At which office will this new user be located?: Sydney

* In which department will this new user be located?: Automation and System

* Job Title: Head of Projects and IT

* Who will be the manager for this new user?: Bob Marley

* Telephone Number: 0388857642

* Does this new user account require an email address?: Yes

Enter main office number if a direct number is not available

Mobile Phone: 0422134212

Submit

Items

- > User Account Properties
- > Resource Access
- > Additional Details

As discussed, if you are comfortable we do not need to provide any of the optional information, we can click Submit now. However it is recommended that you review the optional sections until you are 100% familiar with their contents.

Step 5 - [Optional] Select Start & Exit dates

If we scroll down we will see the User Account Properties. This screen is split into 3 sections each marked in green below. The sections are as follows:

SECTION	DETAIL
---------	--------

User Account Properties (marked 1 in green)	<p>This section provides 2 main areas:</p> <ul style="list-style-type: none"> • Dates (for requesting staff in advance) • General AD Fields (in case you need to edit AD fields directly)
Dates & Licences (marked 2 in green)	<p>Here you can set the Start Date for the staff member, the “required by date” (when licences and creation will occur) and for contractors/short term employees you can also fix the expiry date now if you know when their contract will end.</p> <p>Also if you have either of the following you will see drop downs to change the defaults here:</p> <ul style="list-style-type: none"> • Multiple types of Office Licence • Multiple email domains
General (marked 3 in green)	<p>Here you can see what will be placed in Active Directory (AD) for the staff member.</p> <p>Some customers may need to modify other AD fields in here for their own needs.</p>

The screenshot shows a web form titled "More Information" with three tabs: "User Account Properties", "Resource Access", and "Additional Details".

- Section 1 (User Account Properties):** This section is highlighted with a green box and contains three date pickers:
 - Employee Start Date:** A date picker with a calendar icon. Below it, text reads: "The account will be enabled on this date".
 - Account Required By:** A date picker with a calendar icon. Below it, text reads: "The account will be created 2 business days before this date".
 - Account Expiry Date:** A date picker with a calendar icon. Below it, text reads: "The account will be disabled on this date".
- Section 2 (General):** This section is highlighted with a green box and contains several text and dropdown fields:
 - * First Name:** Text field containing "Stephen".
 - * Last Name:** Text field containing "Dangerfield".
 - * Telephone Number:** Text field containing "0388857642". Below it, text reads: "Enter main office number if a direct number is not available".
 - Initials:** Empty text field.
 - Description:** Empty text field.
 - * Office:** Dropdown menu showing "Sydney" with a search icon and a close button.
 - Web Page:** Empty text field.

Step 6 - [Optional] Select Resources

The next optional step is to confirm the checkboxes or resources for this staff member. The checkboxes provide 3 main categories of resource access:

- Access to optional licensed applications
- Pure “opt ins” – like a Social Club or “Fire Warden” list which can never be handled by automated business rules

- Finally – as part of the setup we will create Resources/Opt-ins for anything we can create a reliable business rule. Over time we should try and replace these with business rules.

Click the Resource Access tab as shown below in green to see the list of checkboxes for your company. Tick any that apply to this staff member. IN the example shown below we have an opt-in (“Social Club”) and two expensive applications (Visio & Project).

The screenshot shows the 'More Information' section with three tabs: 'User Account Properties', 'Resource Access' (highlighted with a green box), and 'Additional Details'. Below the tabs, there is a heading 'A list of resources that require additional permissions' followed by 'Options'. A list of three items is shown, each with a checkbox:

- ☐ Application - Microsoft Project Professional 2016 - en-us
- ☐ Application - Microsoft Visio Professional 2016 - en-us
- ☐ Miscellaneous - Social Club

Step 7 - [Optional] Provide additional text instructions

The final optional step is to click Additional details, and here if you need to provide a bespoke text instruction you can do so.

The screenshot shows the 'More Information' section with three tabs: 'User Account Properties', 'Resource Access', and 'Additional Details' (highlighted with a green box). Below the tabs, there is a heading 'Capture any additional details that are required' followed by 'Additional Requests'. A text input field contains the text: 'Please arrange for a laptop to be built and shipped to Warmnambool office.'

Step 8 – Submit the request

Finally once the mandatory and optional components have been completed click the submit button highlighted in green on the next screenshot:

Home > Self Service Catalog > User Account Management > New User Account

Search

New User Account

This page lists all of the mandatory fields to request a user account. The following page will present you with optional fields.

* First Name

* Last Name

* At which office will this new user be located?

* In which department will this new user be located?

* Job Title

* Who will be the manager for this new user?

* Telephone Number

* Does this new user account require an email address?

Enter main office number if a direct number is not available

Mobile Phone

Items

- > User Account Properties
- > Resource Access
- > Additional Details

Submit

Common questions and answers regarding creating new users:

The following section provides common questions raised and their answers regarding creating new users:

COMMON QUESTIONS	ANSWERS
I can't see Account Management in the Service Catalogue	This means that you have not been granted permission to request new staff members, please contact your local Customer Administrator and ask them to perform the request.
I can't see my job title, department or location in the dropdown list	<p>The automation requires the business rules to consistently deliver the correct permissions. When we have a new department, location or job title – then we need a separate process to validate any changes to business rules (or AD groups & Distribution lists) relating to the new data.</p> <p>Fr this reason, if you are creating a new job title, location or department – log a standard ticket to have them created and we will be in touch to specify any new business rules.</p> <p>Once the business rules have been created, you can create a new user.</p>
How can I ensure that a PC is ready for the new user	We recommend that if you are creating a user with a start date significantly in advance (e.g a month or more) – then set the “required by date” to be a week before the start date.

	This will ensure we have enough time to create the user's equipment.
I don't know the PABX extension for my new employee.	If you don't know the extension for the new employee, or it is created as part of setup, simply add the office switchboard number for now to ensure the email signature has something on it.
I don't have the mobile number for the new starter.	<p>This is one of the more important things to get if at all possible. Without the mobile the staff member cannot do SMS password resets or have a correct email signature (if mobile is displayed).</p> <p>Where possible change the onboarding process so you capture the mobile and enter it at point of creation</p>
I have too many checkboxes on the User Creation Resources page.	<p>As part of the setup, if we cannot create business rules for the assignment of all groups then we will make them checkbox.</p> <p>To reduce the number of checkboxes, where possible work with your Service manager to replace the checkboxes with Business rules.</p>
I am not a customer admin, what happens after the user creation?	<p>If you are not a customer admin, then after you request a new staff member, it will go to your customer admin to approve the request.</p> <p>If you want to know who your customer admins are, speak with your Brennan Service Manager.</p>
I want to understand more about the "business rules"	Ask your customer administrator for a copy of the Automated User Management handbook. This will explain the business rules in more detail.

KB0010059 – SEARCHING THE ENTIRE SITE

KB0010059:	SEARCHING THE ENTIRE SITE
What will this article teach you to do?	This article will show you how to search the site for anything it contains such as tickets, assets, catalogue items, and knowledge base articles.
What do you need to be able to use this article?	There are no pre-requisites for this article other than being able to logon to the Self-Service Portal (KB0010050)
When will I need this article?	You will need this if you want to any of the following item types on the site: <ul style="list-style-type: none">• Tickets• Knowledge base articles• Catalogue Items• Change requests
Summary of steps	<ul style="list-style-type: none">• Logon to the Portal• Search the site• Understanding the Search Categories• Understanding the Results

Overview

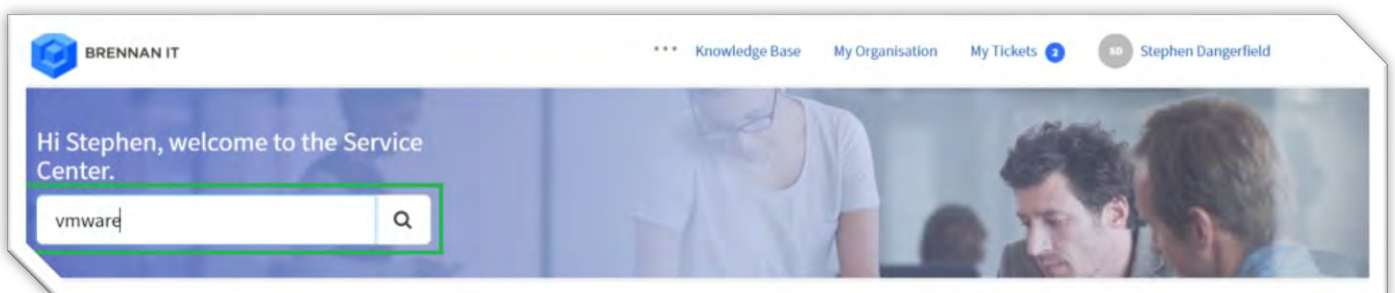
This will help you to search the entire site – this will locate everything not just tickets, but also knowledge base articles and even change requests.

Logon to the Portal

Use article KB0010050 – How to logon to the Self-Service Portal to gain access.

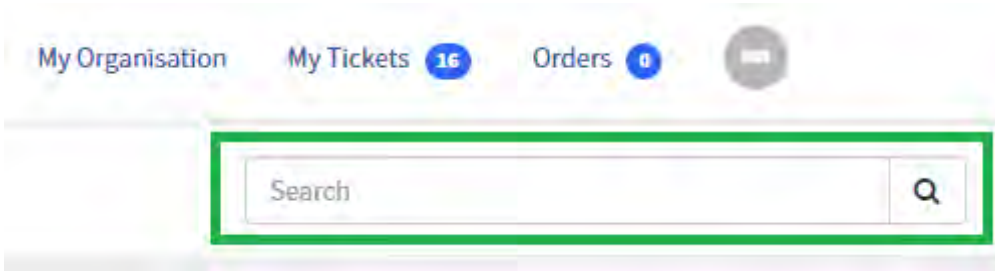
Search the site

To search the entire site simply enter the search word in the header bar as highlighted in green in the screenshot below:



Understanding the Search Categories

The site wide search will search every library in the site, ranging from your tickets, through to BVD network provisioning projects and even service catalogue items. The categories that are searched are explained below.

CATEGORY	EXPLANATION
All	<p>This displays every article and ticket from the site.</p> <p>You can further refine the results page by providing additional search terms in the results page search box shown below:</p> 
Change Request	For customers who have formal change control processes, your change control tickets can be found here.
Communications Tickets	These two categories relate to WAN rollout projects so you can find those tickets relating to particular sites.
Company KB	This is reserved for future customer use, we will support you placing things like health and safety or induction videos and How To articles into your own specific Knowledge Base, these articles will appear here.
Incident	This will display results from the incident table which contains alerts monitoring and other issues.
Knowledge Base	This will display results from the shared Portal Knowledge Base which contains the contents of these handbooks.
Request	This will filter to the request table for all things requested by you or your staff.
Service Catalog	This will display matching items from the Service catalogue, such as New User Creation, password reset or cloud VM ordering and changing.

Understanding the Results

The results are displayed with the categories on the left and the matching words highlighted in yellow. To find what you are looking for either click the item on the right or change the category of results on the left.

My Organisation

My Tickets 16

Home > Search

Search

> All

> Case

> Change Request

> Communications Provisioning Contract

> Communications Provisioning Line Item

> Company KB

> Incident

> Knowledge Base

> Problem

> Questions and Answers

> Request

Service Catalog

Knowledge

Search results for 'admin'

REQ0155230

Number: REQ0155230 · Short description: Onsite 05/06 - 4x built, but still require - Bitlocker, Local Admin, Joined to don
 2018-06-06 10:33:49 · State(state): Billed · Updated: 2018-06-27 10:39:03 · Priority: 5 - Planning · Task type: Request

REQ0086948

Number: REQ0086948 · Short description: Admin for Equip · Opened: 2017-10-23 07:26:05 · State(state): Billed · Upd
 08:07:58 · Priority: 5 - Planning · Task type: Request

REQ0144524

Number: REQ0144524 · Short description: Admin Activities for equip · Opened: 2018-05-02 18:49:23 · State(state): Bill
 2018-05-10 17:36:17 · Priority: 5 - Planning · Task type: Request

REQ0068797

Number: REQ0068797 · Short description: Admin account in Equip environment for Michael Tempone · Opened: 2017-
 State(state): Billed · Updated: 2017-09-07 14:38:21 · Priority: 5 - Planning · Task type: Request

REQ0091497

Number: REQ0091497 · Short description: Needs admin credentials to install Tableau · Opened: 2017-11-06 13:41:50 ·

Common questions and answers regarding searching the entire site:

The following section provides common questions raised and their answers regarding searching the entire site:

COMMON QUESTIONS	ANSWERS

KB0010060 – HOW TO RESET YOUR PASSWORD OR UNLOCK YOUR ACCOUNT VIA THE PORTAL

KB0010060:	RESET YOUR PASSWORD OR UNLOCK YOUR ACCOUNT VIA THE PORTAL
What will this article teach you to do?	This article will show you how to reset your mobile phone or unlock your account.
What do you need to be able to use this article?	<p>In order to self service your password reset or account unlock, you will need a work mobile phone registered with Brennan, without this you will need to call the helpdesk.</p> <p>You will need to be a Brennan Managed Services Customer with End User Support.</p> <p>You will need to be able to access the internet from your phone or another PC.</p>
When will I need this article?	You will need this if you want to reset your password
Summary of steps	<ul style="list-style-type: none">• Go to the portal home page• Click “Can’t Access your account”• Enter your email address• Enter the 6 character reset code• Reset or unlock your account• Wait for the process to complete

Overview

This article allows you to do two things:

1. Reset your work password
2. Unlock your work account

Step 1 - Go to the portal homepage

In a web browser on anyone’s computer (even one you are not logged into) or on your mobile phone go to the Self Service portal at the following link:

<https://brennanitau.service-now.com/selfservice>

Step 2 - Click “Can’t Access Your Account”

From the home page click “Can’t access your account” as highlighted in green below and then click next.

Welcome to Service Portal

Log in to view servicedesk tasks, infrastructure information or report an issue

Enter email address

Can't access your account?

Next

Step 3 - Enter your email address

After clicking “Can’t access your account”, enter your email address as shown in green in the screenshot below and click “Send Code”.

An SMS will be sent to the mobile number that is registered to that email address and should arrive within 5 minutes.

Welcome to Service Portal

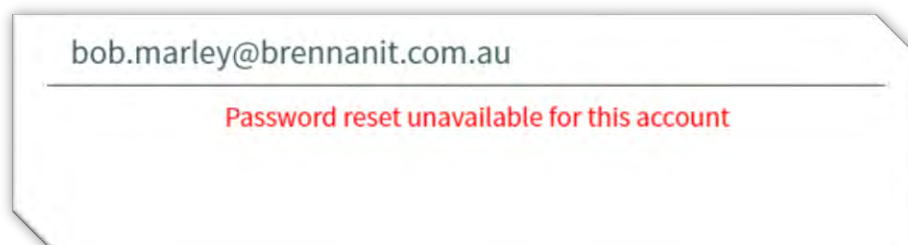
Log in to view servicedesk tasks, infrastructure information or report an issue

bob.marley@brennanit.com.au

A One Time Verification Code will be sent to the verified mobile phone number associated with this account

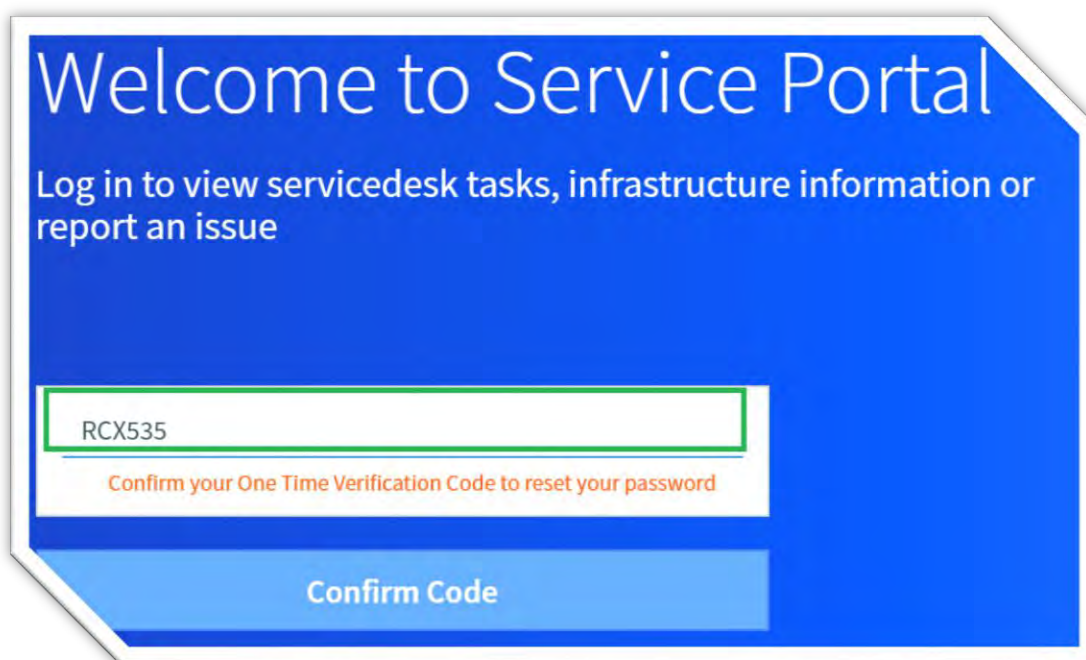
Send Code

Note: If you do not have a mobile number registered you will receive a screen message that password reset unavailable for this account” as shown below. If you see this message - you will need to phone the helpdesk



Step 4 - Enter the 6 character code

Wait 5 minutes for the SMS, if it doesn't arrive, you will need to click refresh on your browser to start the process from Step 2 and to resend an SMS. Once the SMS 6 character code arrives on your phone, enter code in the box highlighted in green below and click Confirm Code.



Step 5 – Unlock or reset your account

Once you have entered the 6 character code, you will be given a choice to either reset your password or unlock your account. Click either “Reset password” or “Unlock Account” as highlighted in green below and then click “Confirm Selection”.

Welcome to Service Portal

Log in to view servicedesk tasks, infrastructure information or report an issue

Please select one of the below options

**Reset
Password**

Blurb or hover here (expired, reset and forgotten, screenshot etc.)

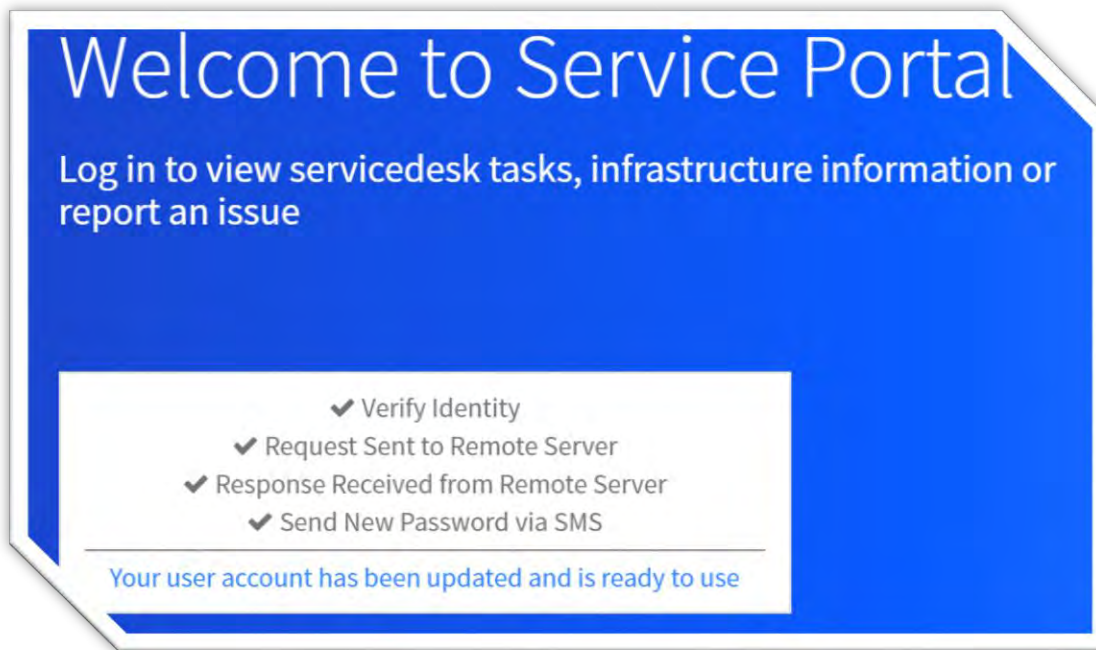
**Unlock
Account**

Blurb or hover here (known value, typed incorrectly, haven't updated device etc.)

Confirm Selection

Step 6 – Wait for confirmation that the password reset has gone through

In very rare conditions such as a network outage, the password reset may not go through, so it is recommended that you watch the process and wait for the confirmation. When the password reset has completed, you will see the confirmation as shown in the following screenshot:



You will receive your new password by SMS. No one in Brennan IT will ever have seen your password.

Common questions and answers regarding password reset and unlocking your account:

The following section provides common questions raised and their answers regarding password reset and unlocking your account.:

COMMON QUESTIONS	ANSWERS
How do I know if I need to reset my password, or unlock my account?	Unlocking an account is provided for when you know you don't want to change your password but your account is locked out or if you are accessing your work from home If unsure, choose to reset your password.
Why can't you just text me a new password?	If we did that then anyone who knew your email address could change your password using the site. So to be secure we have to verify your identity before we reset the account, that is why we text you the verification code.
Can I give you my mobile number when I call the helpdesk?	No, for security reasons mobile phone numbers can only be entered by your Customer Administrator, they will have guaranteed your identity.
What if I don't have a company mobile?	Unfortunately you will have to call the helpdesk unless your company has a BYOD (Bring your own Device") policy that you have signed.

Why should I wait for the process to complete?	In very rare conditions (e.g. a network outage) the reset process may fail, if you wait for the process to complete you can be 100% confident it has actually occurred.
I have a registered work mobile number and I see the message "Password reset unavailable for this account"	<p>Your company administrator must have agreed that passwords can be reset by SMS otherwise you will receive this message.</p> <p>Alternatively you have a mobile number registered, but it is invalid.</p>
What do I do if the SMS doesn't come through?	<p>This is very rare, first check you have mobile coverage on your phone then click refresh on your browser and try again.</p> <p>It can take up to 5 minutes for the SMS to come through.</p>
Can I reset my password if I am working from home and accessing work over the Internet?	You can reset your password, but you may not be able to change it, until you get to the office.
Can I reset my password if I am using a terminal server?	You can reset your password, but you may have to use the temporary password until you get to the office.
What about the password reset mechanism on my PC (the helpfully named "ADSSSP")	<p>The SMS password reset facility is an alternative method to your existing Question & Answer based password reset that is on your PC.</p> <p>In the future we will replace ADSSSP with this Self Service Portal version of password resets</p>

KB0010061 – HOW TO RESET YOUR PASSWORD VIA SMS

KB0010061:	RESET YOUR PASSWORD OR UNLOCK YOUR ACCOUNT VIA SMS
What will this article teach you to do?	This article will show you how to reset your mobile phone or unlock your account using SMS and your mobile web browser only.
What do you need to be able to use this article?	<p>In order to self service your password reset or account unlock, you will need a work mobile phone registered with Brennan, without this you will need to call the helpdesk.</p> <ul style="list-style-type: none">• You will need to be a Brennan Managed Services Customer with End User Support.• You will need to be able to access the internet from your phone.• You should have saved the Brennan SMS password reset number on your mobile phone• Your phone should be displaying your mobile number on outbound calls
When will I need this article?	You will need this if you want to reset your password
Summary of steps	<ul style="list-style-type: none">• Check you have the Brennan password reset number saved in your phone• SMS your email address to Brennan Password resets• Click the link that is sent back• Reset or unlock your account• Wait for the process to complete

Overview

This article allows you to do two things:

1. Reset your work password
2. Unlock your work account

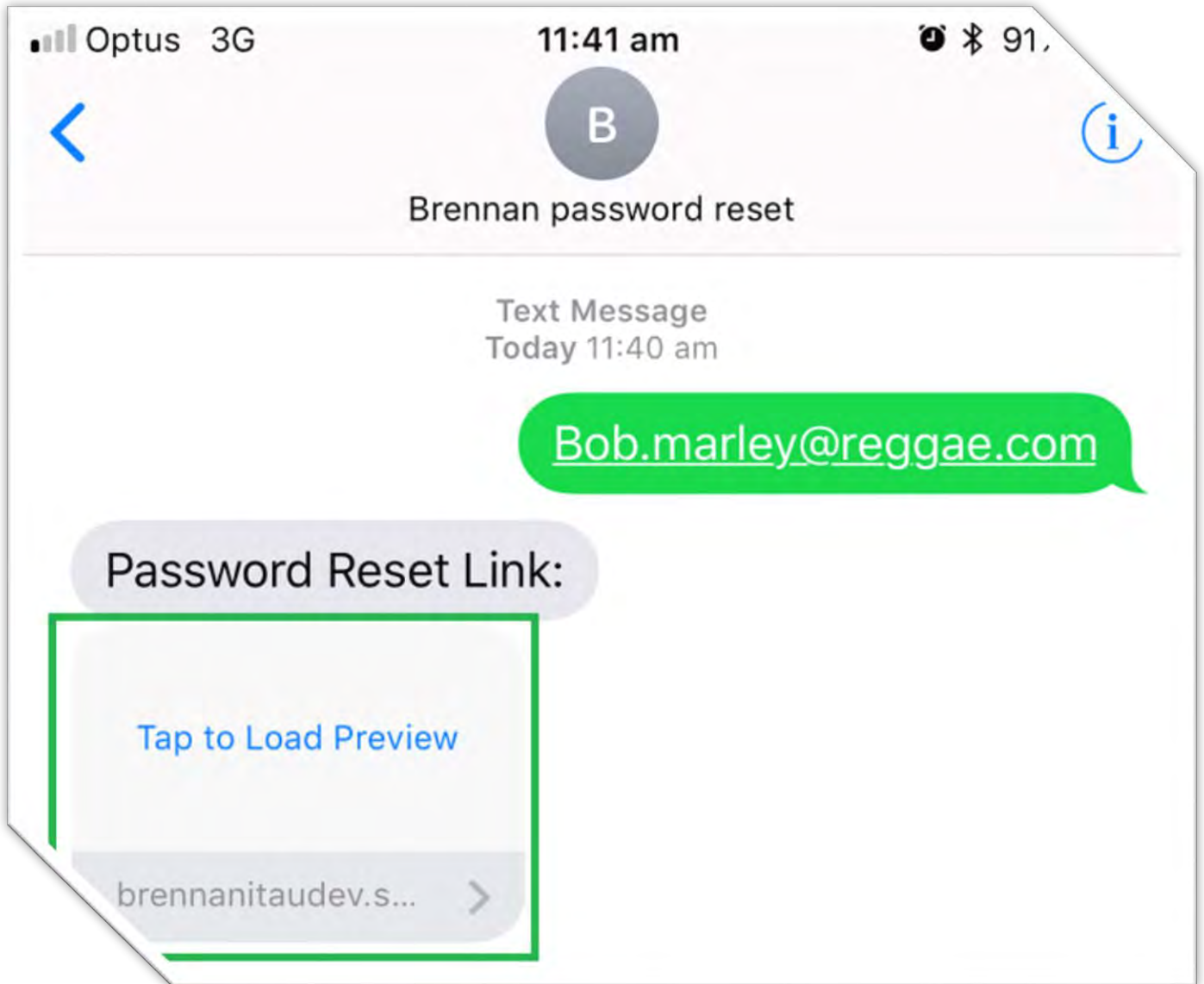
Step 1 – Check you have Brennan IT Password resets setup in your phone

Ensure that you have contact saved in your phone for Brennan SMS password resets, if not add the contact:

+61 447 520 606 into your phone and save it as Brennan password reset.

Step 2 – Text your email address to the Brennan Password reset number.

On your phone, text your full email address (e.g. bob.marley@reggae.com) to the Brennan Password resets. Provided you have been setup and enabled correctly you will receive a message back with “Password reset Link:” and a link to click beneath. On an iPhone this will display as shown below:



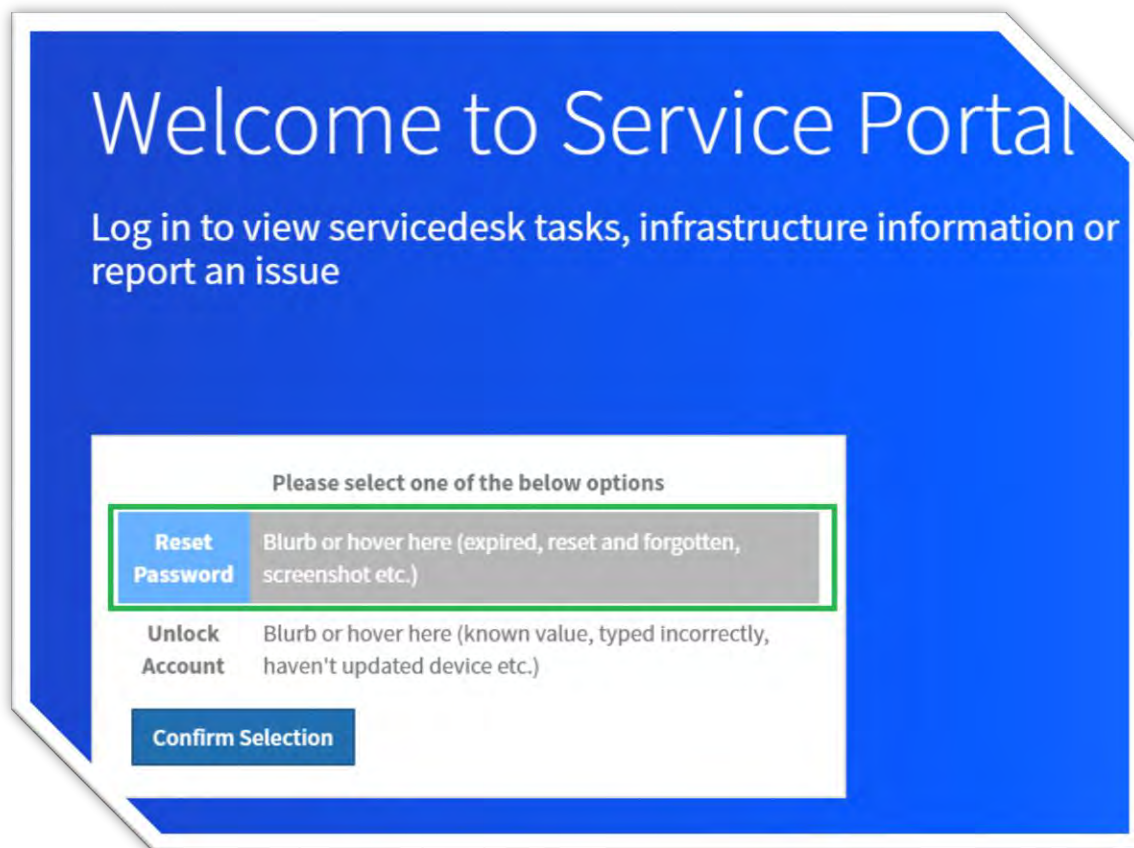
Step 3 - Click “The link” icon

From the link icon as highlighted in green above.

The link expires within 10 minutes. It will take you to the service portal page (Note: For ServiceNow mobile application users, it may open the page inside the servicenow app rather than the browser)

Step 4 – Unlock or reset your account

After you click the link, you will be given a choice to either reset your password or unlock your account. Click either “Reset password” or “Unlock Account” as highlighted in green below and then click Confirm Selection



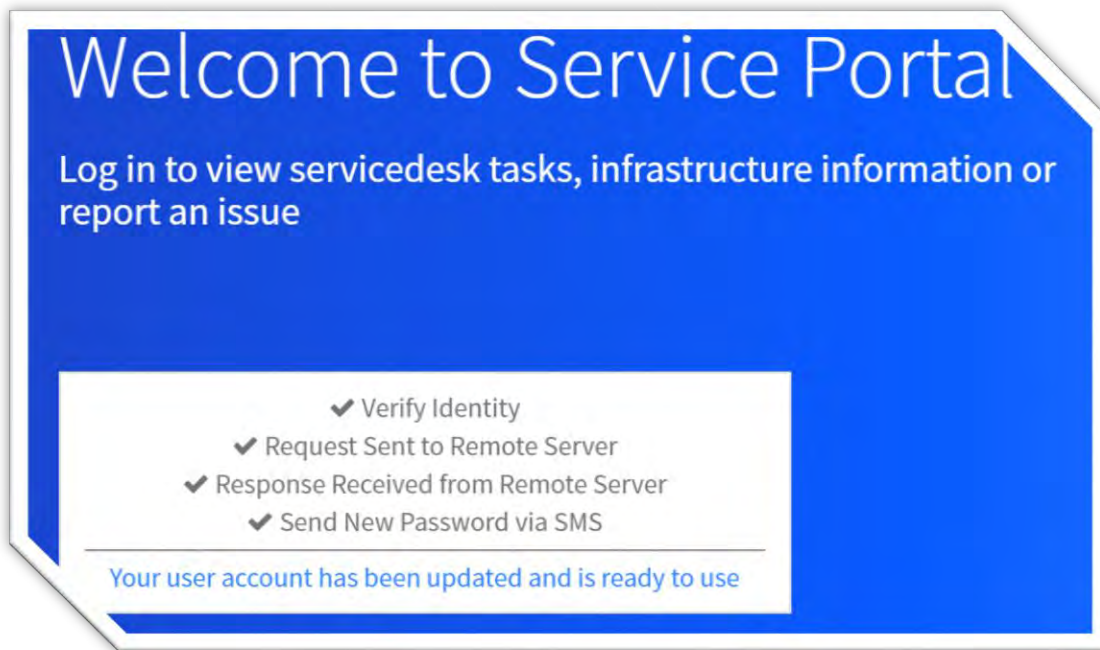
The screenshot shows a blue background with the text "Welcome to Service Portal" and "Log in to view servicedesk tasks, infrastructure information or report an issue". Below this is a white box containing the text "Please select one of the below options". There are two options: "Reset Password" and "Unlock Account". The "Reset Password" option is highlighted with a green border, and the "Unlock Account" option is also highlighted with a green border. Below these options is a blue button labeled "Confirm Selection".

Please select one of the below options	
Reset Password	Blurb or hover here (expired, reset and forgotten, screenshot etc.)
Unlock Account	Blurb or hover here (known value, typed incorrectly, haven't updated device etc.)

Confirm Selection

Step 5 – Wait for confirmation that the password reset has gone through

In very rare conditions such as a network outage, the password reset may not go through, so it is recommended that you watch the process and wait for the confirmation. When the password reset has completed, you will see the confirmation as shown in the following screenshot:



You will receive your new password by SMS. No one in Brennan will ever have seen your password.

Common questions and answers regarding password reset and unlocking your account:

The following section provides common questions raised and their answers regarding password reset and unlocking your account.:

COMMON QUESTIONS	ANSWERS
I never received a text message	<p>If you have waited 5 mins and still don't have a SMS then check that your mobile is configured to display its outbound number and that you typed your email fully and correctly.</p> <p>If this is the very first time you have tried to reset your password this way, call the Helpdesk on 1 300 500 000</p>
Why do I have to enter my email address	<p>The security is based on something you have (your mobile phone) and something you know (your email address). We need something you know, otherwise anyone with your phone could reset your password.</p>
Why should I wait for the process to complete?	<p>In very rare conditions (e.g. a network outage) the reset process may fail, if you wait for the process to complete you can be 100% confident it has actually occurred.</p>

I have a registered work mobile number and I see the message "Password reset unavailable for this account"	<p>Your company administrator must have agreed that passwords can be reset by SMS otherwise you will receive this message.</p> <p>Alternatively you have a mobile number registered, but it is invalid.</p>
What do I do if the SMS doesn't come through?	<p>This is very rare, first check you have mobile coverage on your phone then click refresh on your browser and try again.</p> <p>It can take up to 5 minutes for the SMS to come through.</p>
Can I reset my password if I am working from home and accessing work over the Internet?	You can reset your password, but you may not be able to change it until you get to the office
Can I reset my password if I am using a terminal server?	You can reset your password, but you may have to use the temporary password until you get to the office
What about the password reset mechanism on my PC (the helpfully named "ADSSP")	<p>The SMS password reset facility is an alternative method to your existing Question & Answer based password reset that is on your PC.</p> <p>At some stage in the future we will replace ADSSP with this Self Service Portal version of password resets</p>



BRENNAN
People first – secure always