OTS Self Service Portal

Self Service User Guide

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DOCUMENT HISTORY

Version	Date	Additions/Changes	Prepared/Reviewed By
1.0	08/27/2018	Initial Submission	Kyle Summers
1.1	09/04/2018	Login URL Update	Kyle Summers
1.2	04/16/2019	Managing Approvals	Kyle Summers
1.3	02/12/2024	OTS Branding formatting and name change	D'Wanna Collins

GENERAL INFORMATION

The OTS Self Service Portal, also known as Ivanti, allows users to submit Service Requests and Incidents. The portal also streamlines approval processes and task assignments using automated workflows.

AUDIENCE

This guide is intended for users who have access to the OTS Self Service Portal and have the Self Service User (SSU) role. The Individuals using this document are Self Service Users presenting incidents or request to OTS for support.

PURPOSE

This guide is intended for users who have access to the OTS Self Service Portal and have the Self Service User (SSU) role.

SCOPE

This document is intended for SSUs and provides only general Ivanti instructions. This guide is not intended to reflect any specialized Service Request.

ACCESSING THE IVANTI LOGIN PAGE

1. Navigate to the following URL: https://otssupport.la.gov

   a. Google Chrome is the preferred web browser.

   b. The system logs the user into Ivanti automatically using single sign-on authentication.

   c. The user must connect to the Louisiana State Network directly or via VPN to use Ivanti.

   d. If unable to log in, please email OTSSupport@LA.GOV.

2. The user will be presented with the default 'Home Page' which uses the default dashboard that corresponds that has been assigned to them.
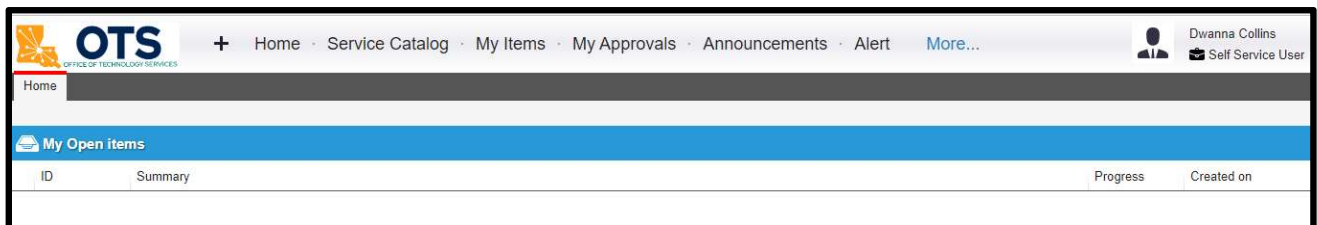
HOME FEATURES

My Open Items

- My Open Items section on your Home Page will present you with any open tickets you may have. You can see the ID, Summary, Resolution Progress, and Creation Date in this section.

ID	Summary	Progress	Created on
1027799	My Computer Keeps Crashing		8/30/2018 9:45 AM
1027798	Requesting VPN Access		8/30/2018 9:45 AM

My Open items

- You can view previous items by clicking on the '**View All My Items'** link at the bottom of the Open Items section of the Home Page.

View All My Items

- This will display all of your currently open items and previously closed items as well.

ID	Summary	Type	Status	Due Date	Progress	Created On ▼
1027799	My Computer Keeps Crashing	Incident	Logged	9/5/2018 7:00 PM		8/30/2018 9:45 AM
1027798	Requesting VPN Access	Incident	Logged	9/5/2018 7:00 PM		8/30/2018 9:45 AM
5000066	New User Account	Service Request	Submitted	9/5/2018 2:33 PM		8/29/2018 2:33 PM

SERVICE CATALOG

Service Catalog Features

- The Service Catalog is a selection of Service Request that users can submit to OTS using the Ivanti ITSM system.

- Access the Service Catalog by clicking on the link to the Service Catalog workspace at the top of the page.
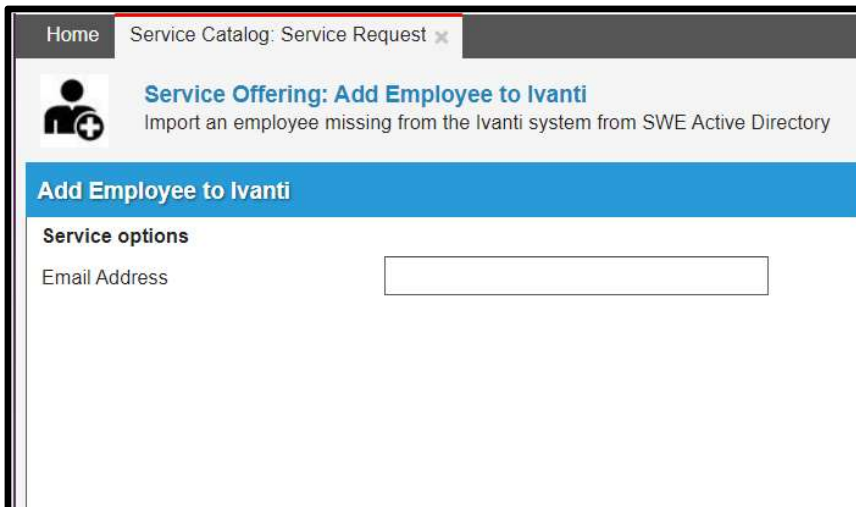

Service Catalog Items are separated by categories related to the intention of the Service Request.

Using Service Request

1. Click on the Service Request to be presented with fields to enter information related to the Service Request selected.

2. Required fields will be identified by an asterisk to the left of the required field.

3. Click the '**Cancel**' button to cancel the entry process and return to the Service Catalog.

OTS

VIEWING TICKET DETAILS

From the Home Page, click on the item listed in your 'My Open Items' section. This will present you with the details of your ticket.

Incident Fields

Incident ID: This is the ticket number for the Incident entered

Status: This is the status of the Incident

- Logged – Incident has been documented, but an analyst has not reviewed the incident yet

- Active – An analyst has reviewed the incident and triage or resolution actions are being performed

- Wating on Customer – The analyst cannot continue working on the issue without information or action from the user who submitted the incident

- Waiting on 3rd Party – The analyst is waiting on information or action from a 3rd party. This can be another party within the organization, external party, or vendor

- Waiting on Resolution – A resolution has been identified and is in the process of being applied

- Resolved – The incident is considered to be resolved

- Closed – The incident is closed and cannot be reopened. A new incident will need to be opened if original problem persists

Summary: Brief summary of the incident

Description: Detailed description of the incident

Resolution: Details on the resolution of the incident

Attachments: Documents or files attached to the incident by either the customer or the analyst

Activity History: View of communications between the analyst and the user who submitted the incident

Request Fields

Request#: The ticket number for the Request

Request Name: Name of the Service Request

Description: Description of the Service Request

Order Date: Date that the Request was originally submitted

Status: Status of the Request

- Submitted: Request has been submitted and is awaiting on analyst to review

- Active: Request is being reviewed or processed by an analyst

- Approved: If an approval was required, it has been completed and approved and is awaiting analyst next steps

- Approval Rejected: A required Approval was denied or canceled, and the SR is awaiting analyst next steps

- Waiting on Customer: Analyst cannot proceed with the request without further information or action from the user who submitted the request

- Waiting on 3rd Party: The analyst is waiting on information or action from a 3rd party. This can be another party within the organization, external party, or vendor

- Fulfilled: The request process has been completed and no further action is required

- Cancelled: The request processed has ceased without completion and no further action is required

CANCELLING YOUR TICKET

Cancelling Incidents

Incidents can be canceled while in the logged status, prior to analyst assignment.

1. From the Home Page, click on the item listed in your '**My Open Items**' section.

   a. This will open the details of your Incident.

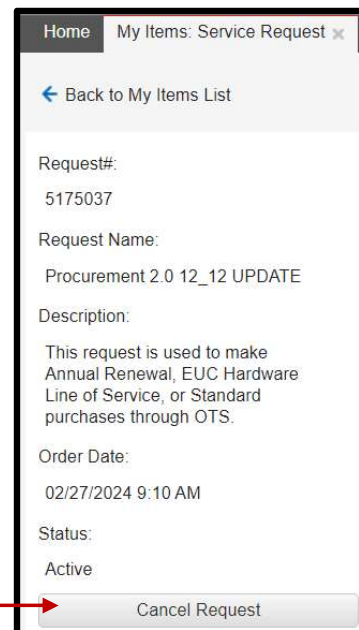2. Click the '**Resolve Incident'** button at the bottom of the page.
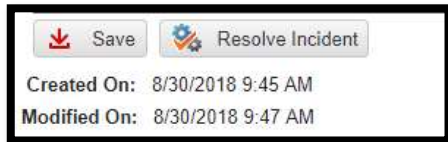
   a. You will be required to enter the details of the resolution.

   b. Click '**OK**'
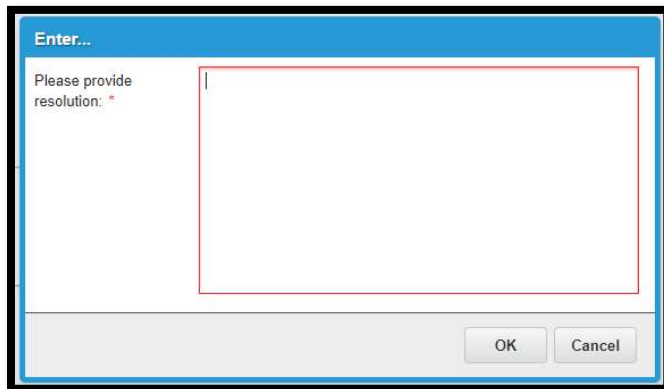
Cancelling Requests

1. From the Home Page, click on the item listed in your '**My Open Items**' section.

   a. This will open the details of your Request.

2. Click '**Cancel Request**'

3. Click '**OK**' to confirm cancelling the request.

MANAGING APPROVALS

Approving or Denying Requests for Approval

From the Home Page you can view any open Approvals in the "My Approvals" section.

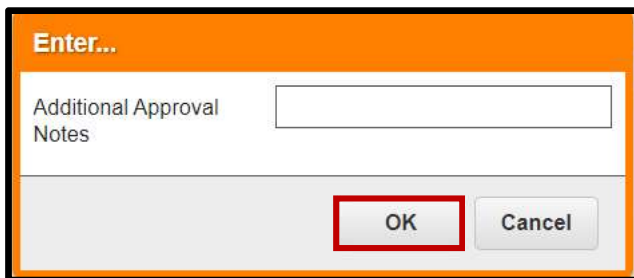1. Select the **My Approval** tab at the top of the page.

NOTE: If My Approvals is not displayed click **More**.

2. Click on any of the Approvals to open the associated Service Request Information.

3. Click the '**Approve**' button to approve the request or click the '**Deny**' button to deny the request.

4. A pop-up window to supply an approval or denial reason will be presented.

5. Once your reason is provided, click '**OK**' to complete the approval process.

GLOSSARY

EUC – End User Computing. This is a section of the Office of Technology Services (OTS). EUC functions as the statewide first point of contact for support services related to IT incidents, issues, and requests.

Incident – An unplanned issue or failure related to an IT service. Incidents are submitted using the OTS Self Service Portal.

Ivanti – The Information Technology Software Management (ITSM) system used by OTS. It allows for the submission and processing of Incidents, Service Requests (SRs), Approvals, and more. Also known as the OTS Self Service Portal.

OTS – Office of Technology Services. This state agency provides information technology (IT) support, services, and equipment for the state government.

OTS Self Service Portal – The Information Technology Software Management (ITSM) system used by OTS. It allows the submission of Incidents, Service Requests (SRs), Approvals, and more. Also known as Ivanti.

Role - Each user in the OTS Self Service Portal, also known as Ivanti, can have one or more roles. The current role of a user determines various access permissions within the system.

SR – Service Request. An end-user request that is not a failure (Incident). Service Requests (SRs) are used to request a service from OTS and have the ability to follow a workflow to provide automation. Service Requests are submitted using the OTS Self Service Portal.

Task – A single action to be performed by a single team. Tasks can be linked to Incidents and Service Requests. If a Service Request contains a workflow, Tasks can be created and assigned to the appropriate team automatically.

Workflow – A predefined process that starts on the submission of a Service Request (SR). Workflows can create Approvals, Tasks, and more automatically and are developed based on the needs of end-users.