Aranda Service Management

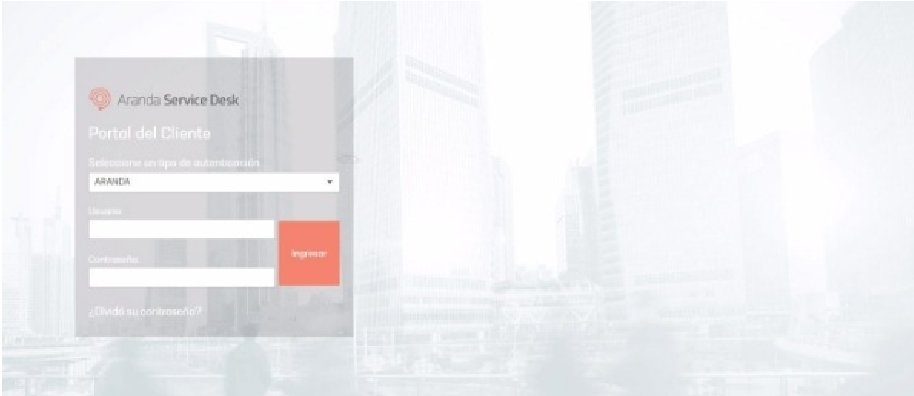
ASMS Customer

The ASMS (ASMSCustomer),** It is a self-service website where end users can perform tasks such as creating cases, viewing created cases, answering satisfaction surveys, consulting the knowledge base, and viewing news, among others.

Login to the console

Login to the console

Enter the client console via the following URL: http(s)://name_servidor:port/ASMSCustomer/



1. Authentication

Select the authentication type, enter the username and password, and click the Enter.

1. Remember password

By clicking on the text Forgot your password?, the following window will appear asking you to send the username to reset the password.

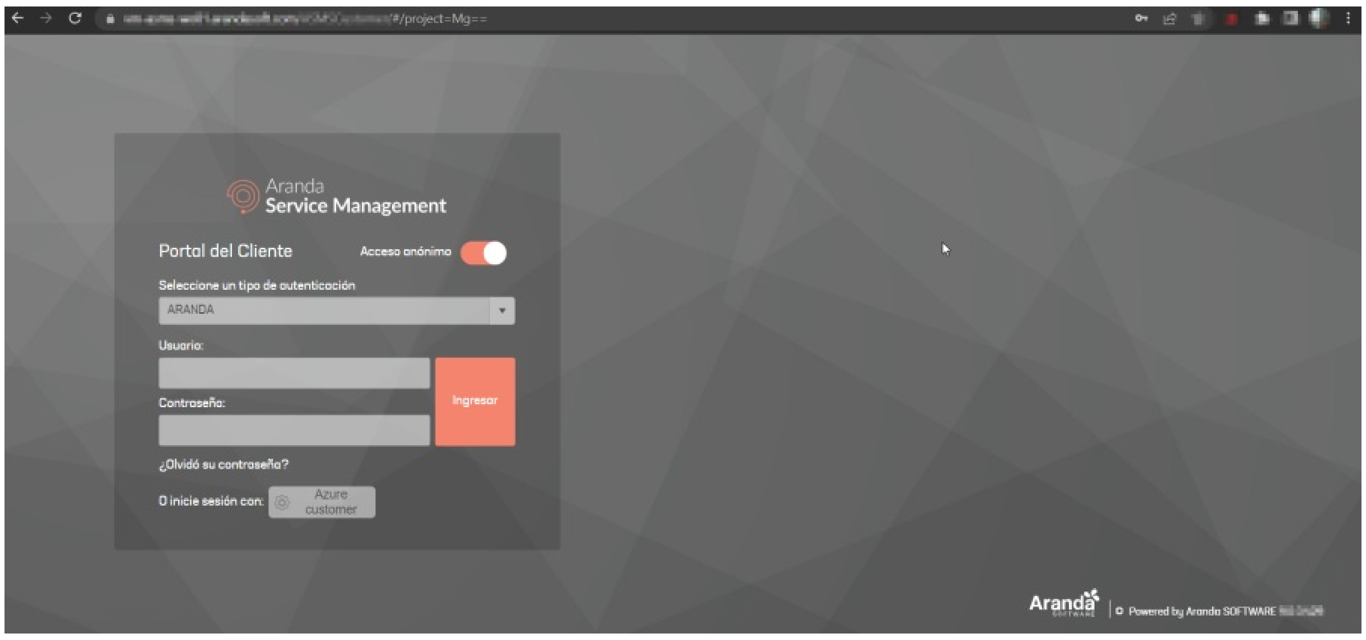
⚐ Note: The Remember Password functionality is only enabled for local users, it will not be displayed for domain users.

Anonymous authentication

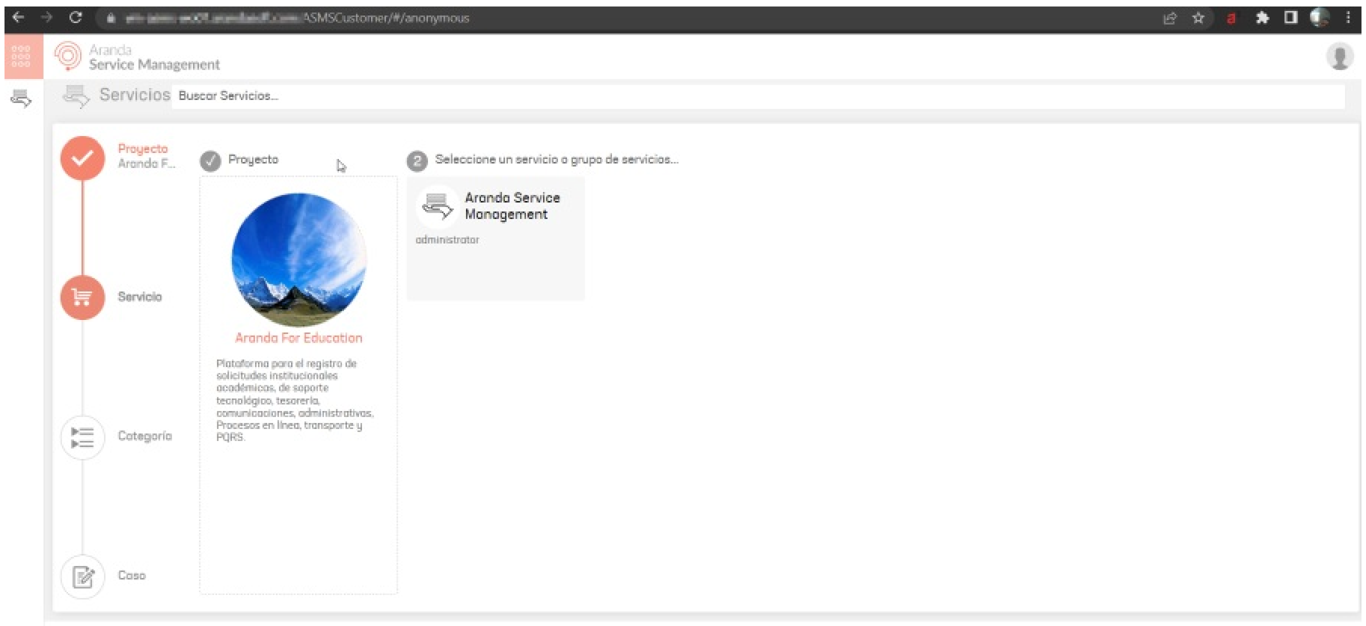
To anonymously access the user portal, please note the following:

- Make sure you have anonymous access enabled on your project.
- Log in to the user portal using the project-specific link. [View Projects ↪]

1. Once you access the user portal using the project link, Enable the "Anonymous access" and click the "Enter".



When you have logged in to the user portal anonymously, you will be able to see the project and the services you have access to to perform case creation. [See Create a Case ↪]

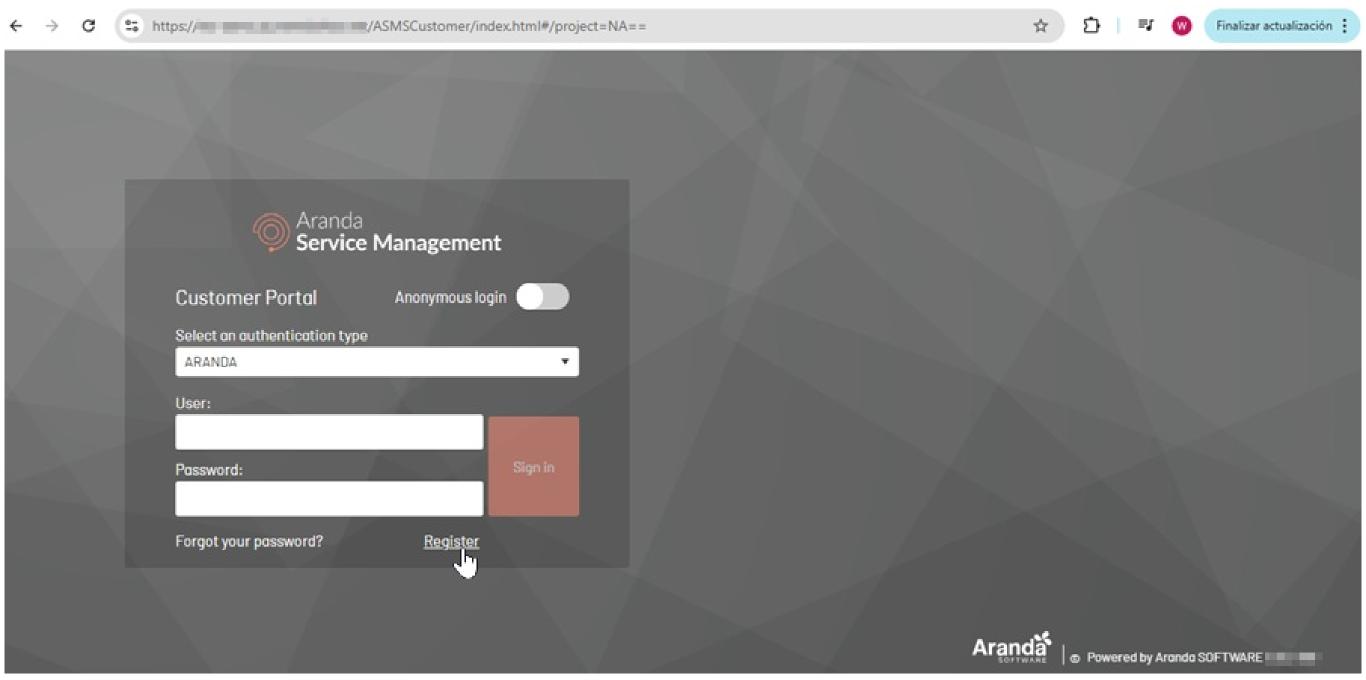


Customer Self-Registration

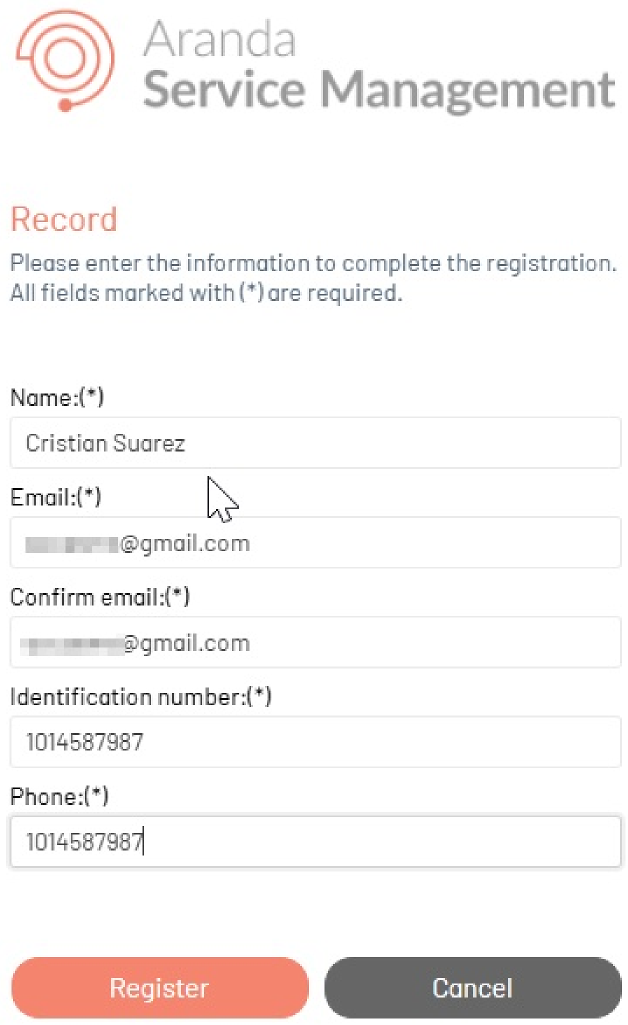
Prerequisites

- Verify that self-registration is enabled on the project.
- Access the user portal using the project-specific link. [View Projects ↪]

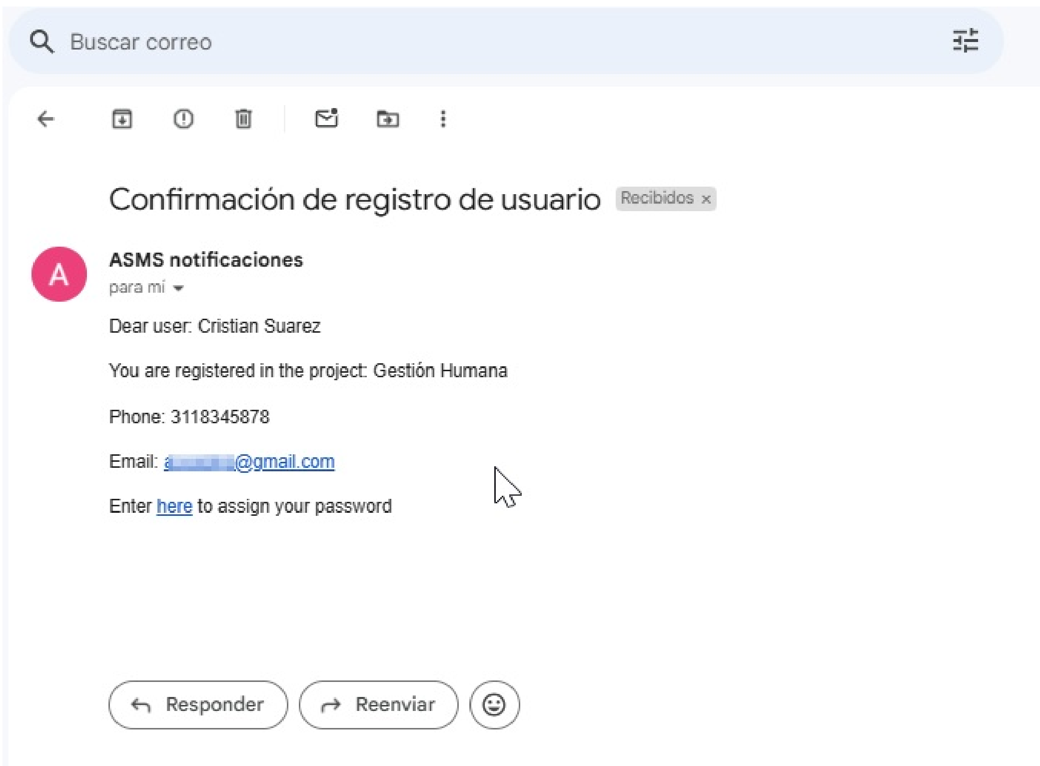
1. Access the user portal using the project link and click on the Register.



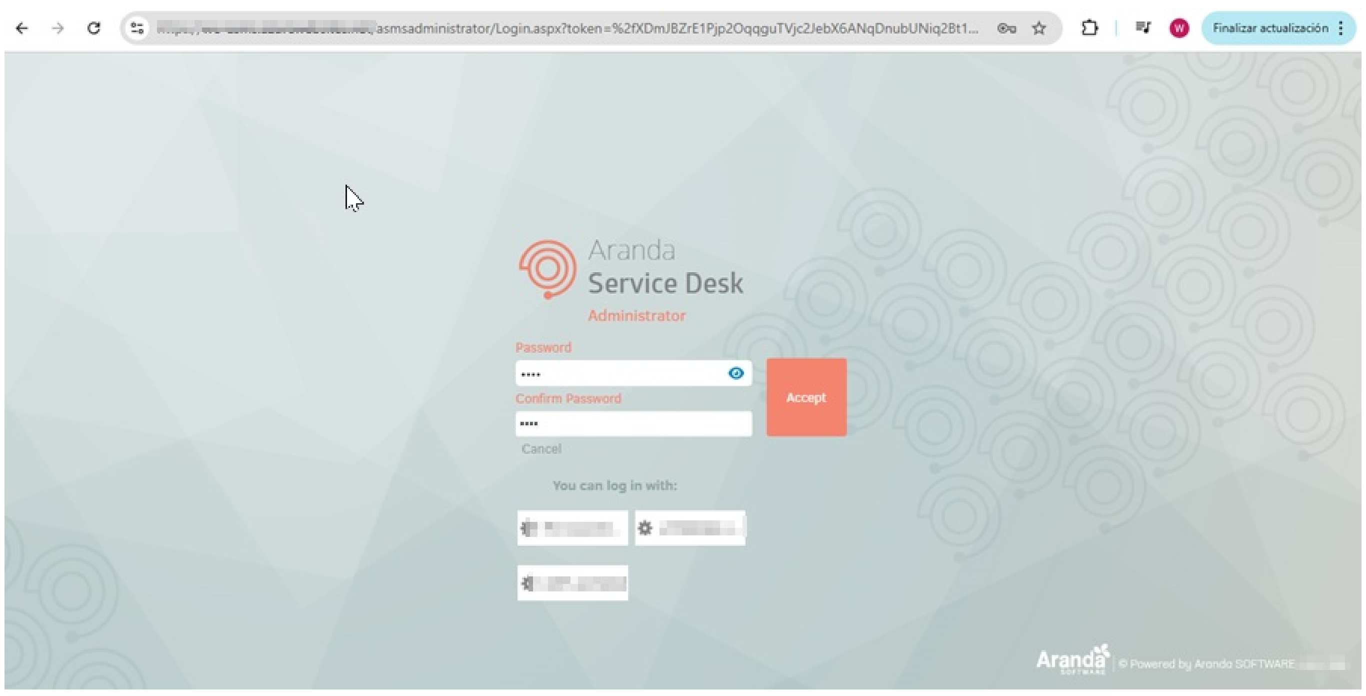
2. Complete all required fields on the Registration form and click Register.



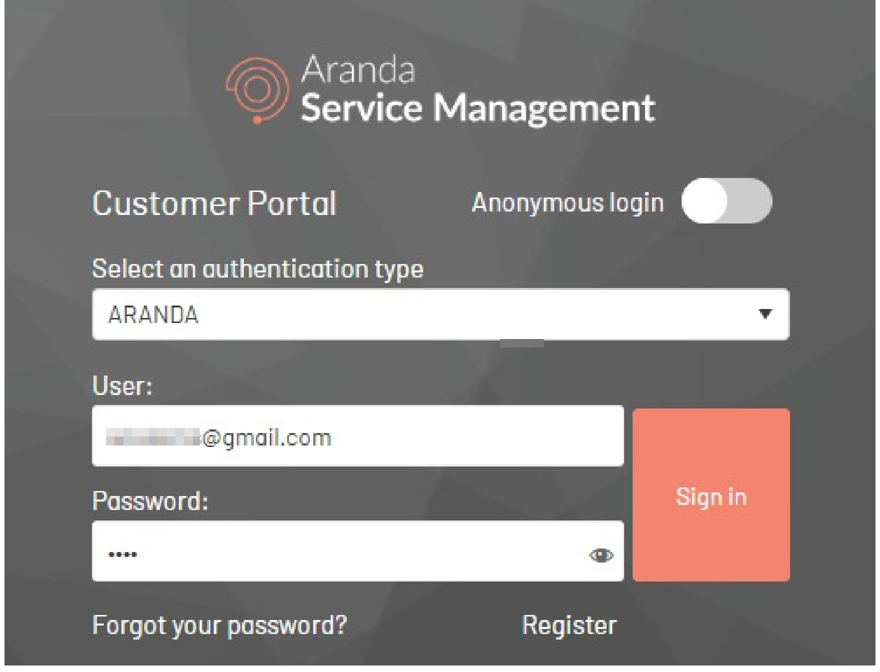
3. Upon successful registration, you will receive an email with instructions on how to create your password.



4. Click on the password assignment link found in the email. A page will open where you will need to enter your new password and confirm it in the Confirm Password field.



5. After assigning and confirming your password, click the OK button. You will be redirected to the user portal. To log in, enter your email address in the field User and the password assigned in the Password.



Guided view

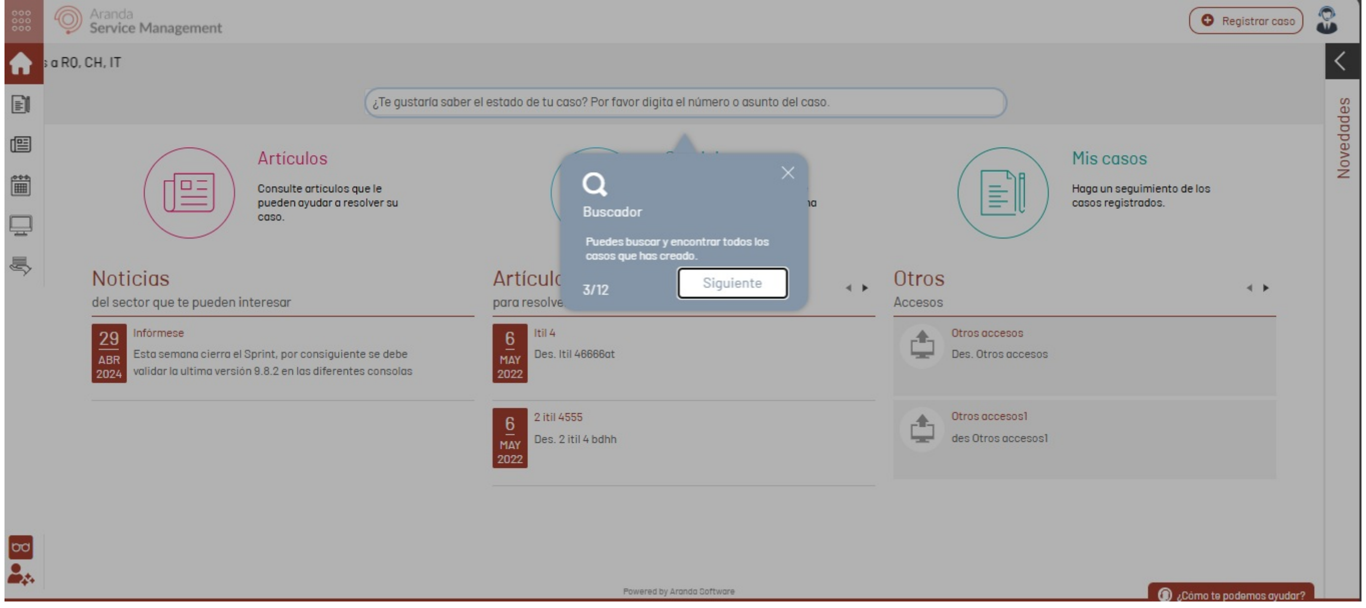
Guided tour

When you first log in to the ASMS Customericon, click the

located at the bottom left of the home page.

A window is enabled with a message of welcome. Click the Following to start the tour.

The guided tour provides windows where the basic contents and pertinent information of the Main functionalities of the console.



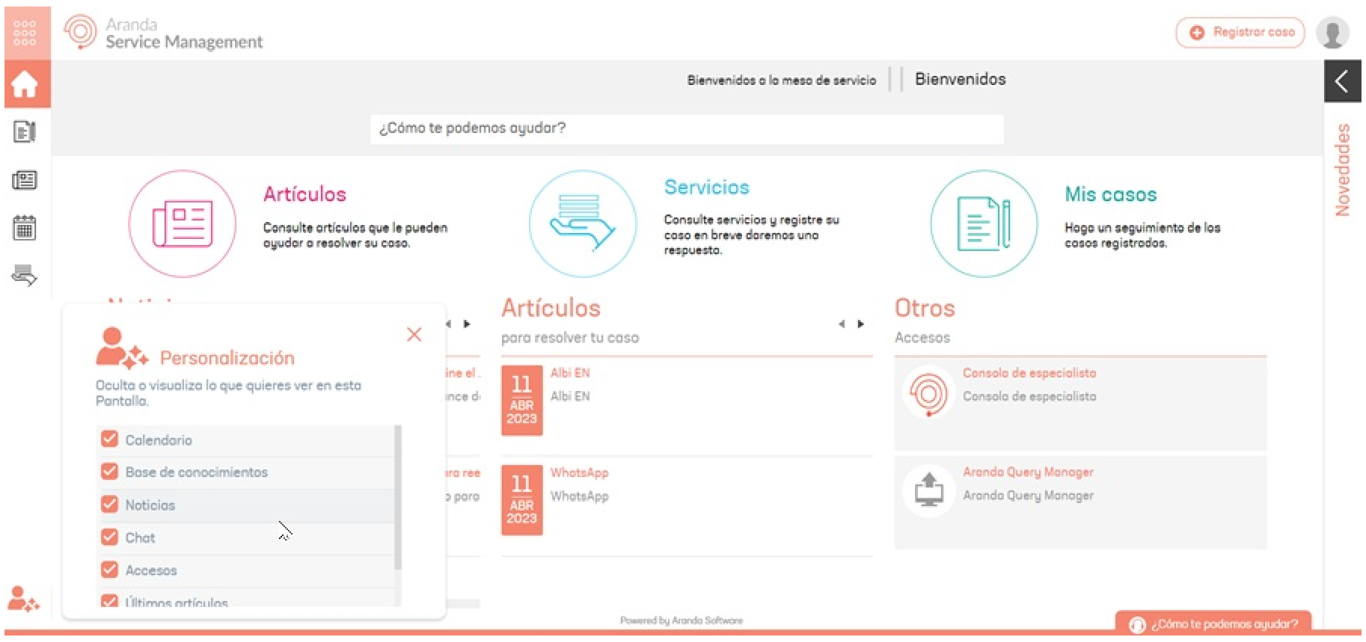
⚐ Note:
• The icon will be available only in the main window of the portal.

Homepage customization

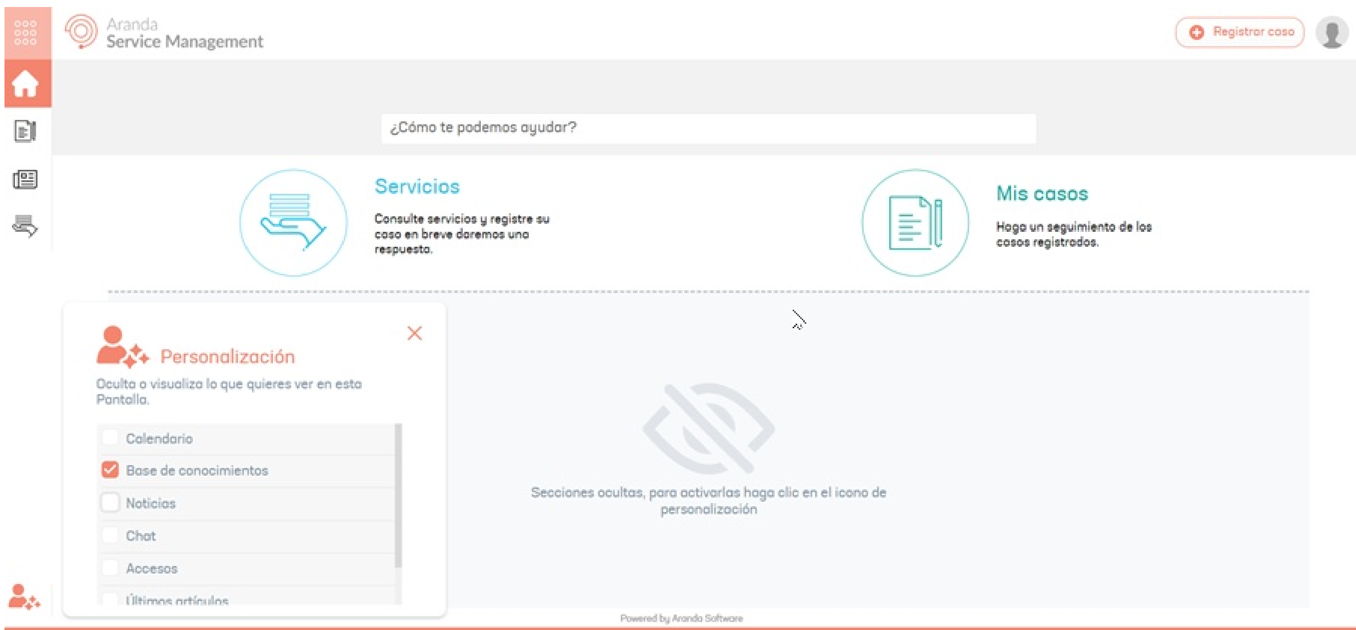
Homepage customization

This functionality allows the user to hide various sections of the user portal home page.

1. Click the “Personalization” at the bottom left of the screen.

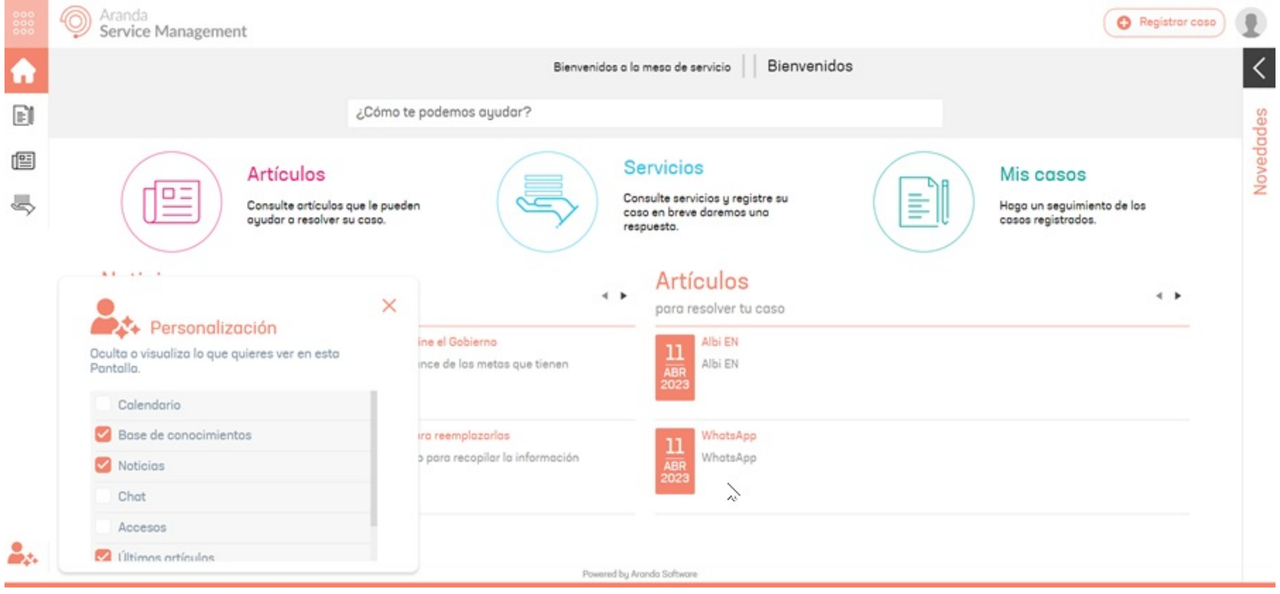


2. Uncheck the options you want to hide from the homepage.



⚐ Note: The only options that cannot be hidden are “Services” and “My cases”.

3. To re-show the hidden options, open the customization option again and check the options you want to show again.

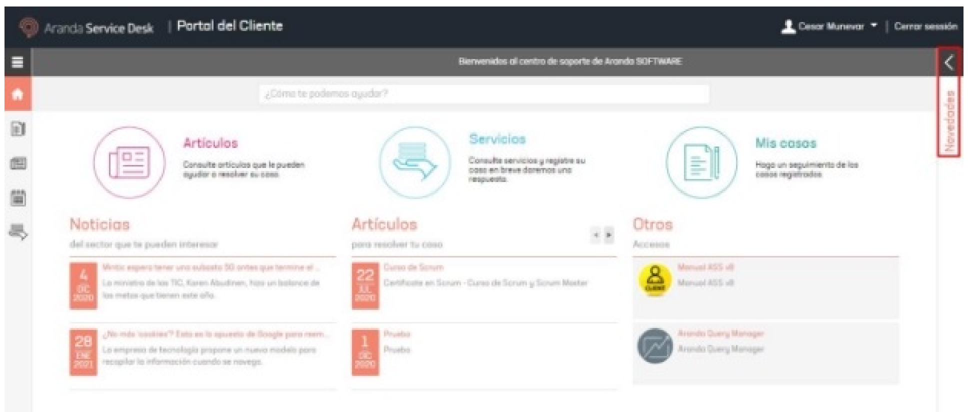


What’s New Panel

What's New Panel

The news panel shows the user’s pending surveys and approvals, as well as the news published on the portal.

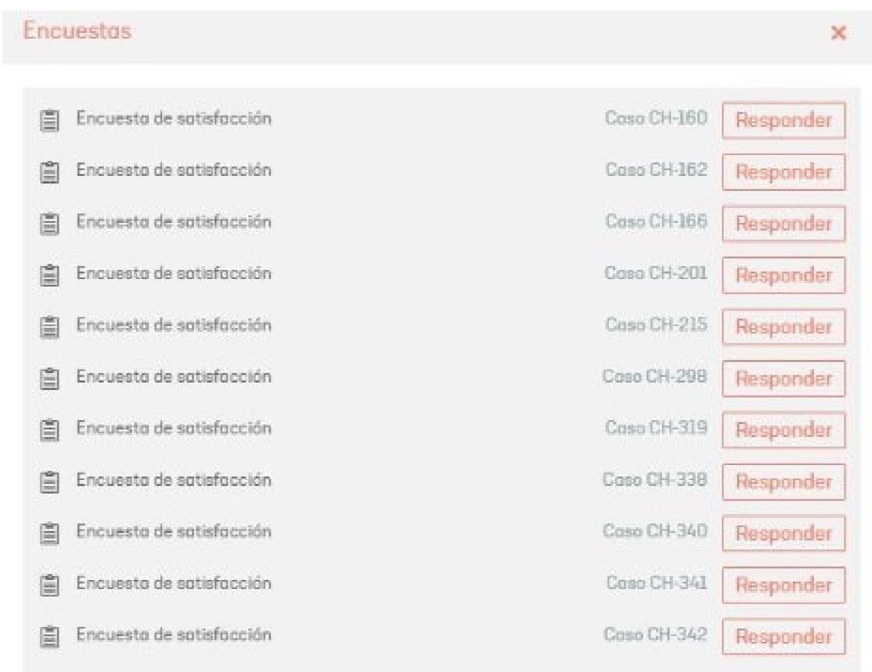
To access the What’s New panel, click the arrow in the upper-right corner of the screen.



The panel will be displayed showing the number of surveys and approvals pending response, as well as the links to access the published news.

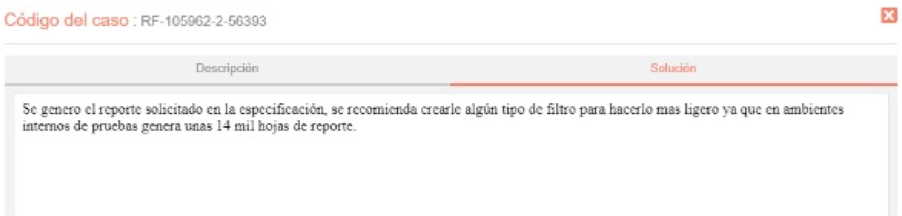
Pending surveys

Click the View Surveys and the list of pending surveys and the corresponding case number will be displayed.



By clicking the Respond, a new tab will open with the satisfaction survey.

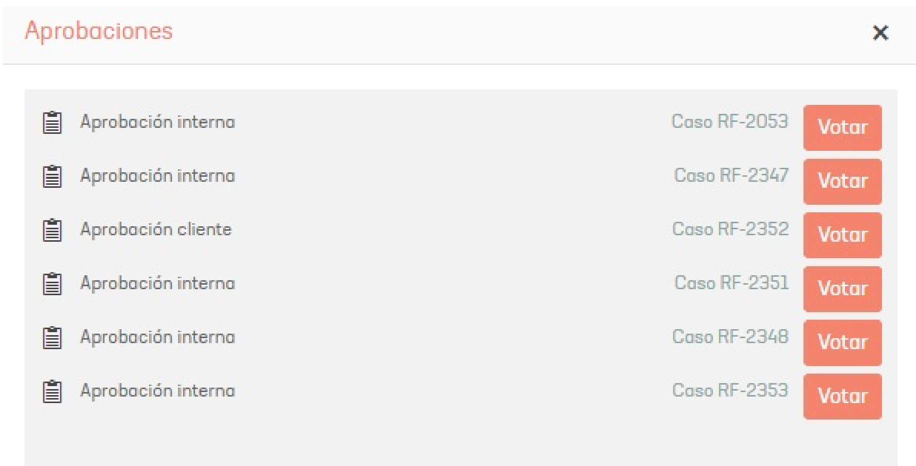
By clicking the VIEW DETAIL A new window is displayed with the description and solution of the case.



When you finish filling out the survey, click on the Send Survey.

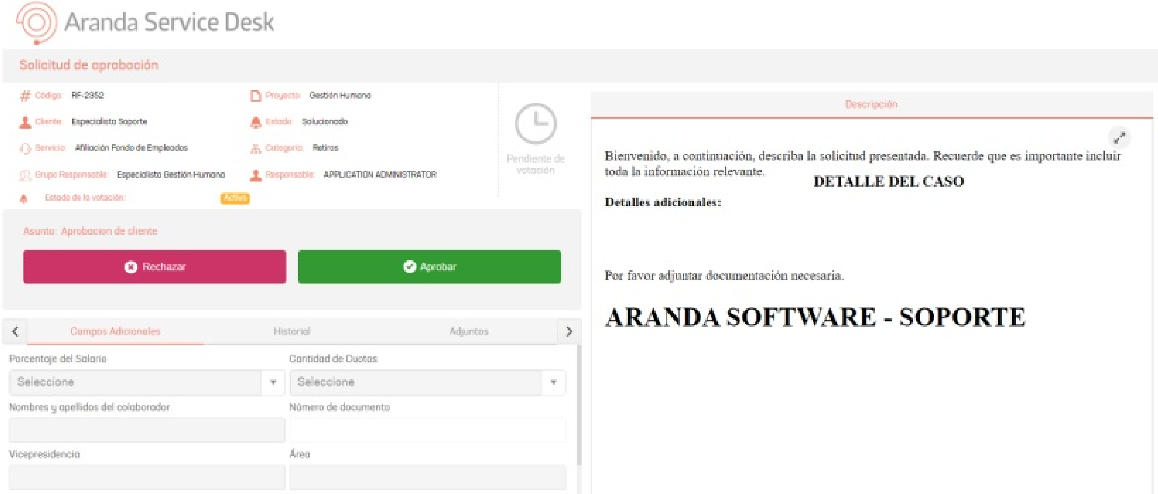
Pending approvals

By clicking the "View Cases", a list of pending approvals and the corresponding case number is displayed.



⚐ Note: If the user has the role of specialist and client, and has approvals assigned for these two roles, the approvals will be displayed within this list.

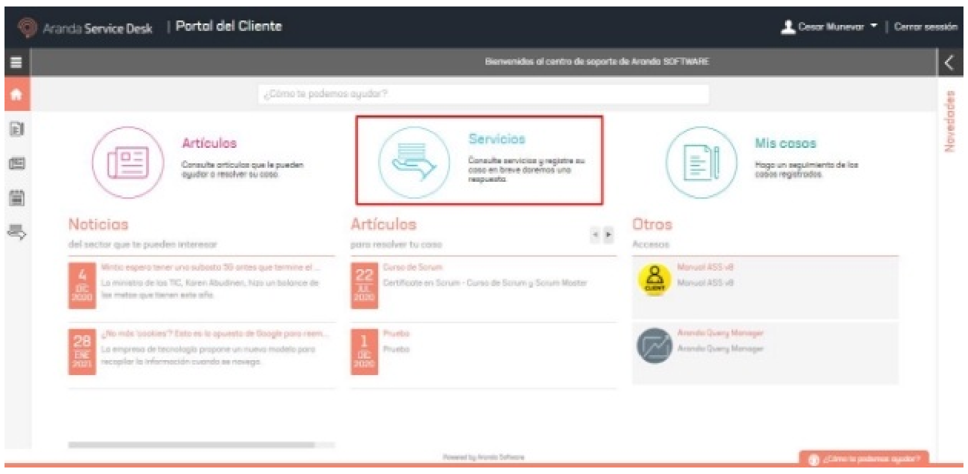
When you click the "Reply", a tab is enabled with the case information and options to approve or reject the case.



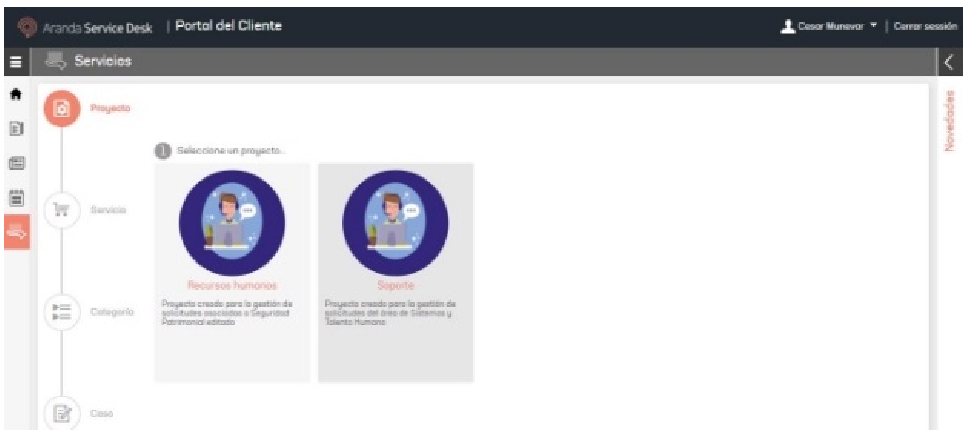
Create a case

Create a case

To create a case, click Services in the middle of the screen. You can also access it from the console's main menu.

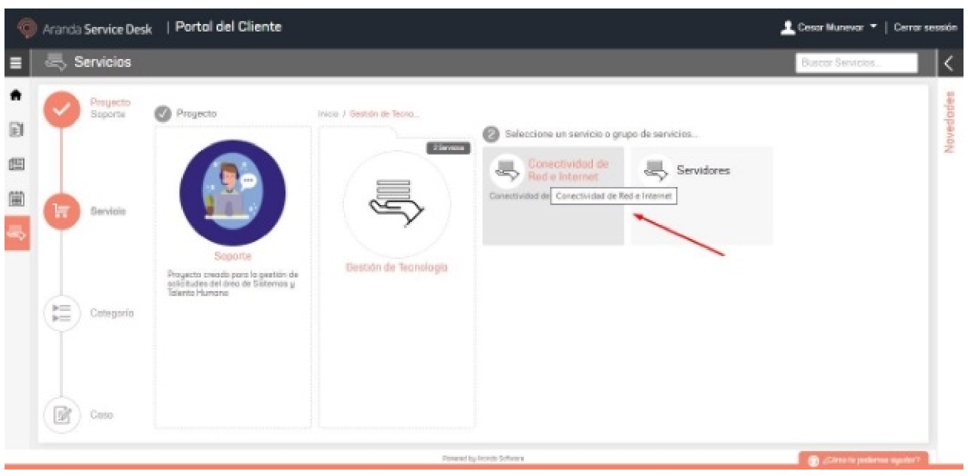


Select the project in which you want to create the case.

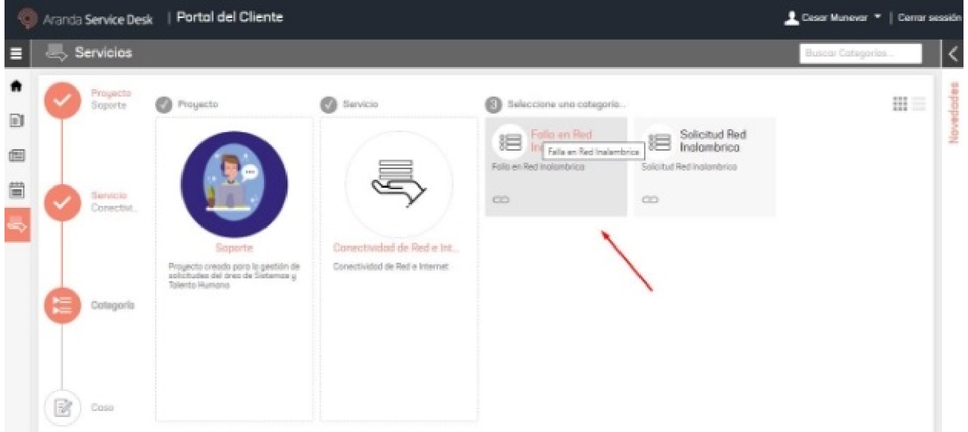


⚐ Note: On the left side you can see a forward line where the first step is the selection of the project. During the process, you can use the forward line to return to any previous steps.

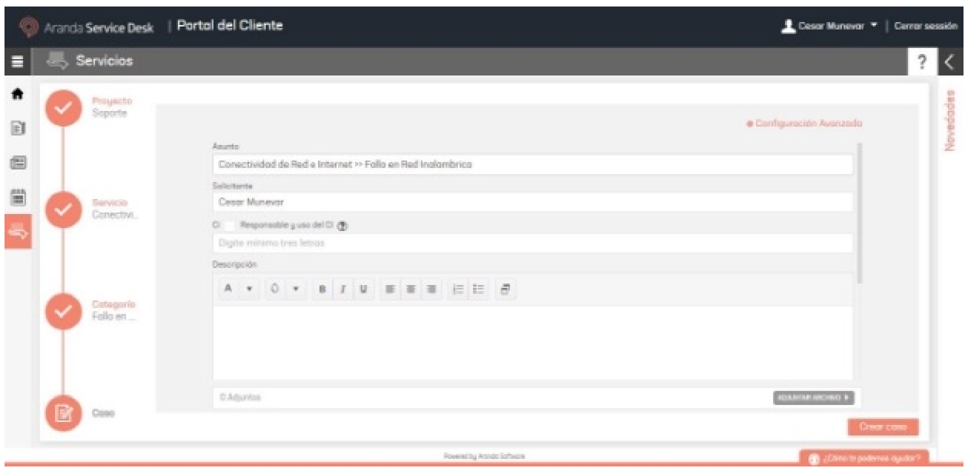
The service or service groups associated with the selected project are displayed. Choose the service on which you want to create the case.



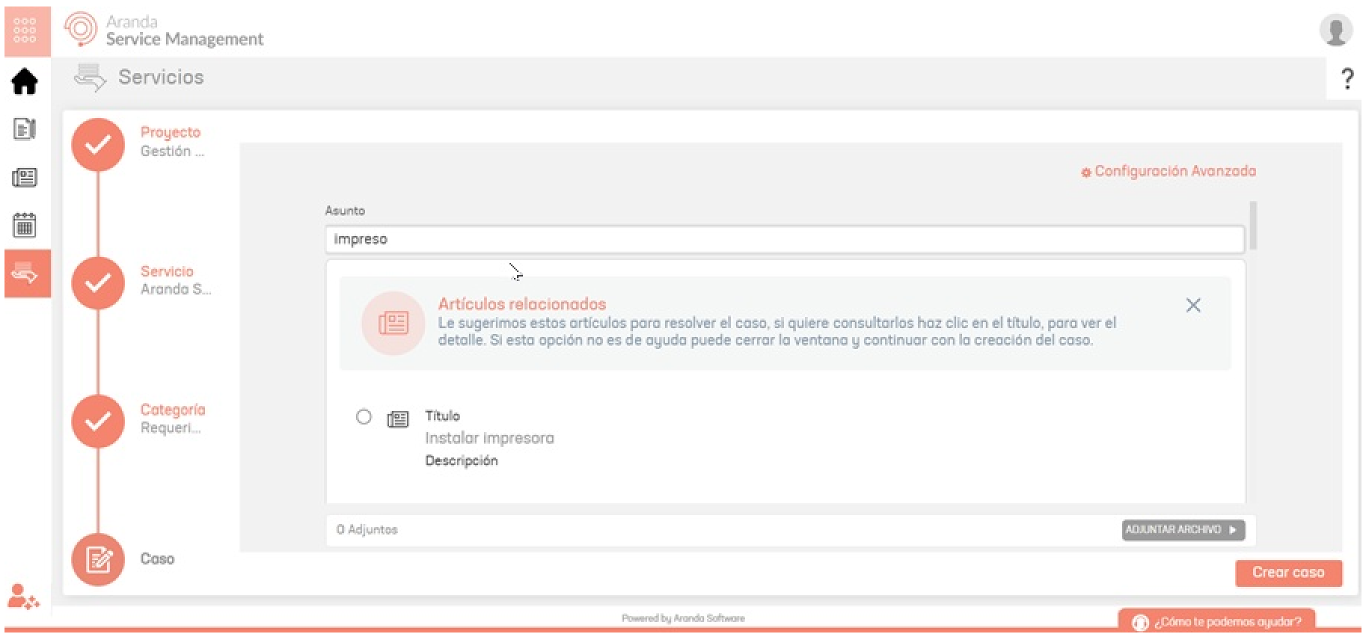
Once the service is selected, the associated categories will be displayed, choose the category on which you want to create the case.



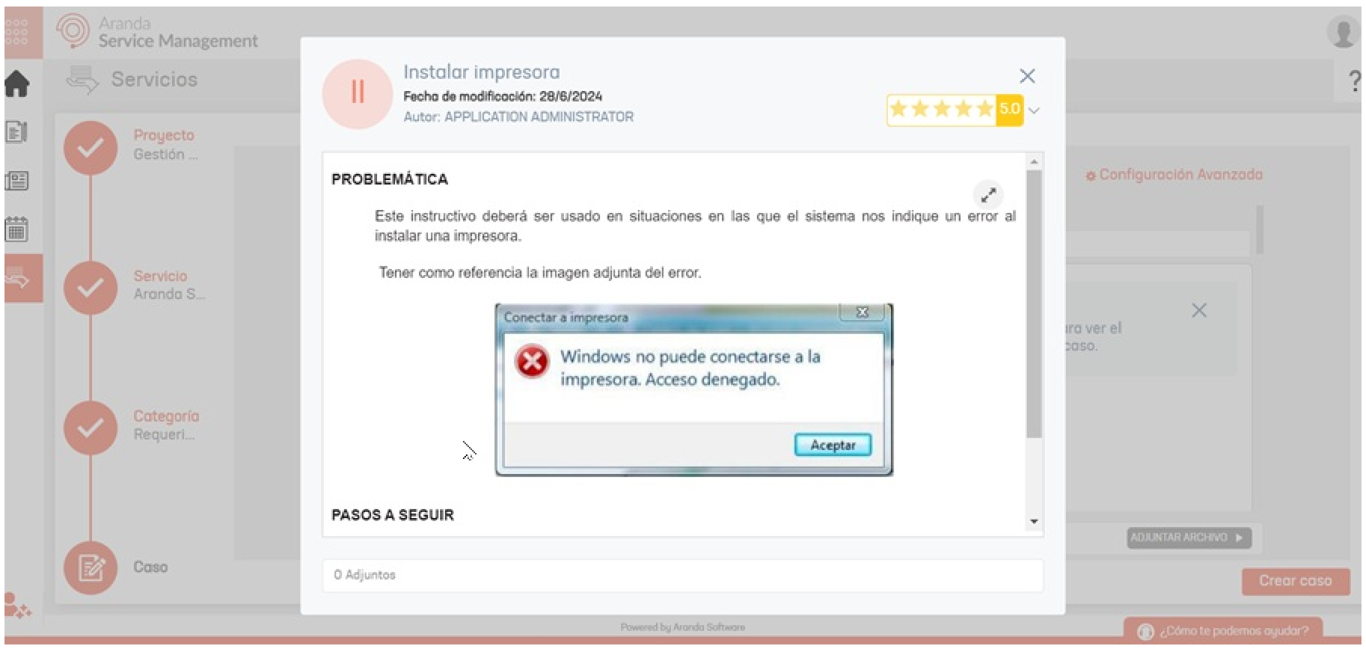
The case creation form opens. There you enter the subject, the description of the case, fill in the additional fields and attach the necessary files.



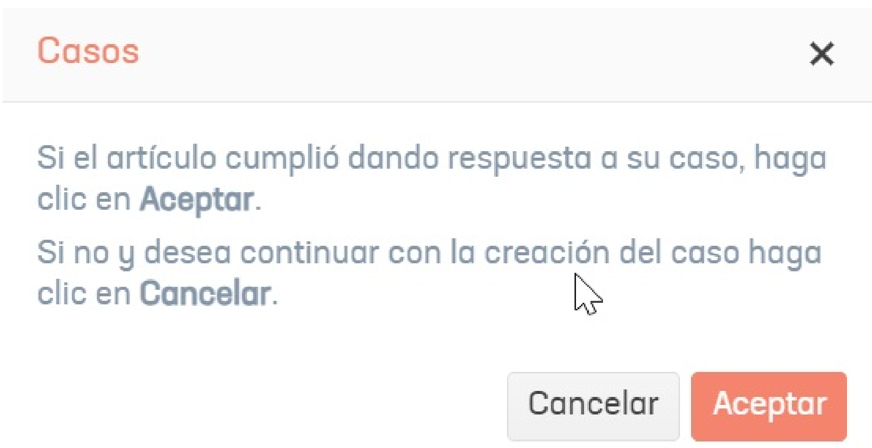
Entering text in the subject field will list matching articles. The search is carried out by title, description, identifier, keywords and/or content of the article.



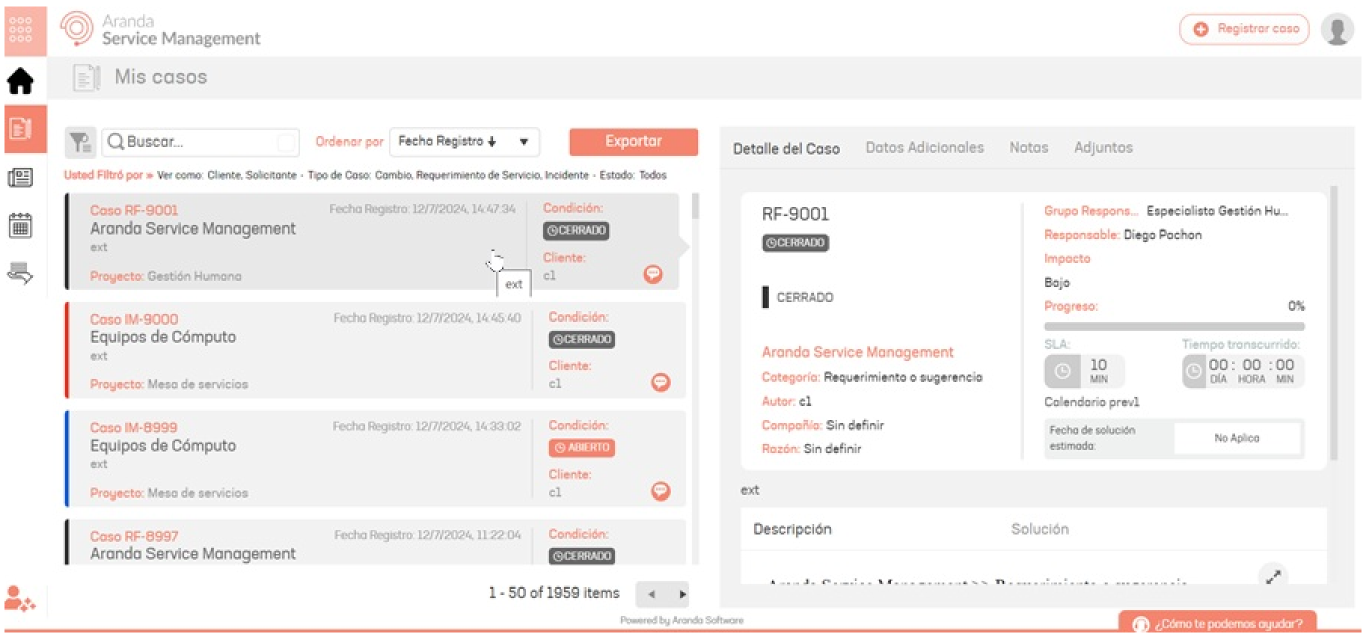
Click on the article of interest to view its content.



If the article responds to the case you are posting, check the box to associate it. The following window will be displayed:



By clicking “Cancel”, the item will not be associated. By clicking “Accept”, the case will be created, and the item will be associated with the case.



⚐ Note: >

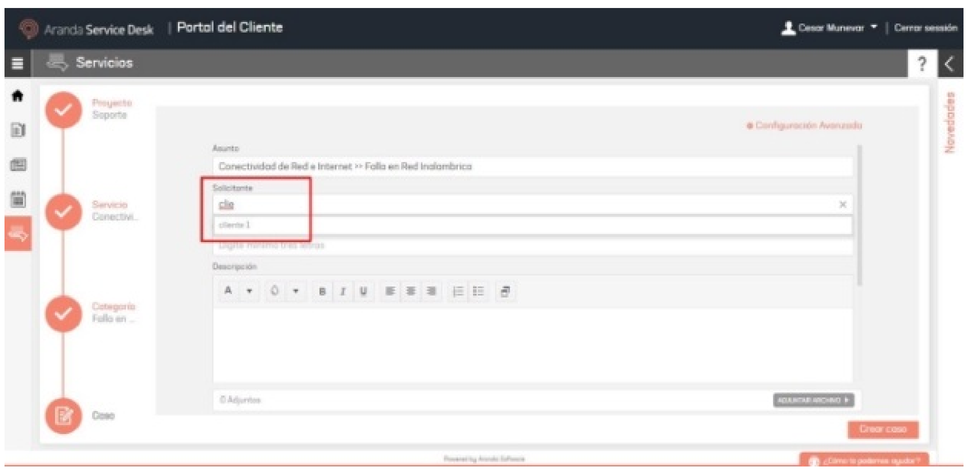
- If there are additional required fields, they will be requested once you click on the “OK” button.
- If there is a state with the “Default Closure” behavior in the status flow, the case will automatically be created as closed.
- If there is no state with the “Default Close” behavior in the state flow, the case will be created in the first state of the flow.

Attachments

The file types allowed by the application to add attachments are defined in a whitelist that can only be modified from the site’s webconfig file (ASMSCustomer). The decision to use this whitelist is made by ethical hacking guidelines that have been applied after vulnerability tests carried out on the application.

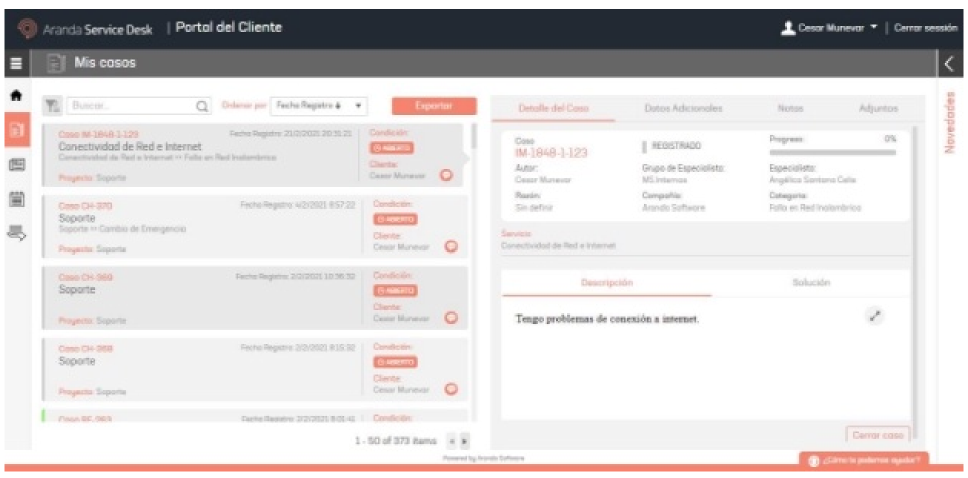
> File Extensions
>
> ZIP, RAR, EMZ, 7Z, DOCX, PDF, TXT, INX, XLSX, DOC, EVT, Log, XLS, RDLX, SVCLOG, PML, XLSM, AAM, PRC, RTF,
>
> pptx, dmp, repx, ppt, jpeg, jpg, png, gif, tif, vsd, vsdx, svg,dsf, bmp, jfif, ico, emf, bmp, avi, webm,
>
> MP4, MSG, EML, RESX, CLL, SQL, RDL, CONFIG, AMK, BAK, CSS, CSV, DLL, MOV, XML.

The console allows you to create cases on behalf of another customer, for this in the Applicant Search for and select the user’s name.



⚐ Note: The requesting customer must be previously associated with the project and/or service in order to be displayed in the search.

Finish by clicking the Create Case. The creation of the case will be confirmed and the list of cases will be opened.



Automatic identification of duplicate cases

When registering a new case, if you have the identification of duplicate cases configured in the case and project type, the tool validates that the following elements are the same, to confirm the element as duplicate or not:

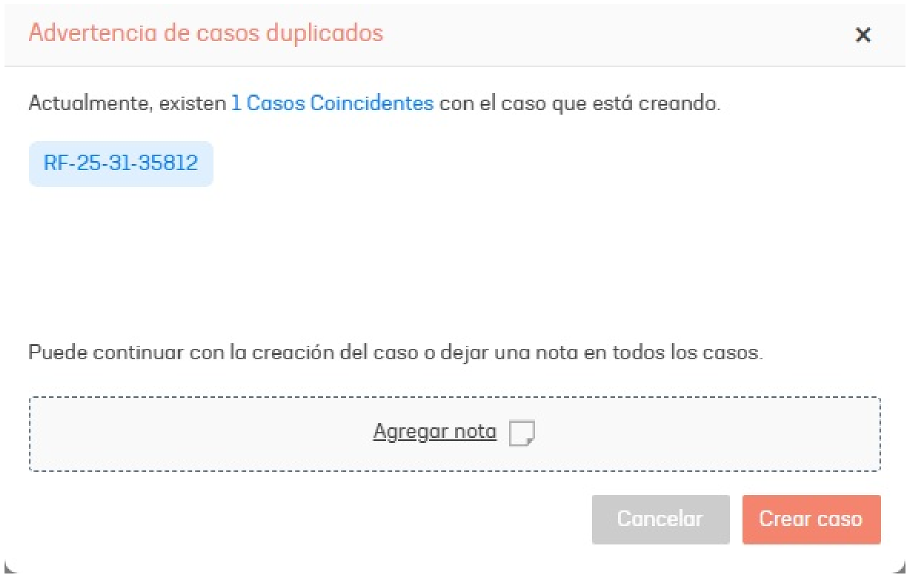
- Project.

- Type of case.
- Service.
- Category.
- Customer.
- Affair.
- Time configured in the administration console (Taken into account by seconds).

Options when having duplicate cases

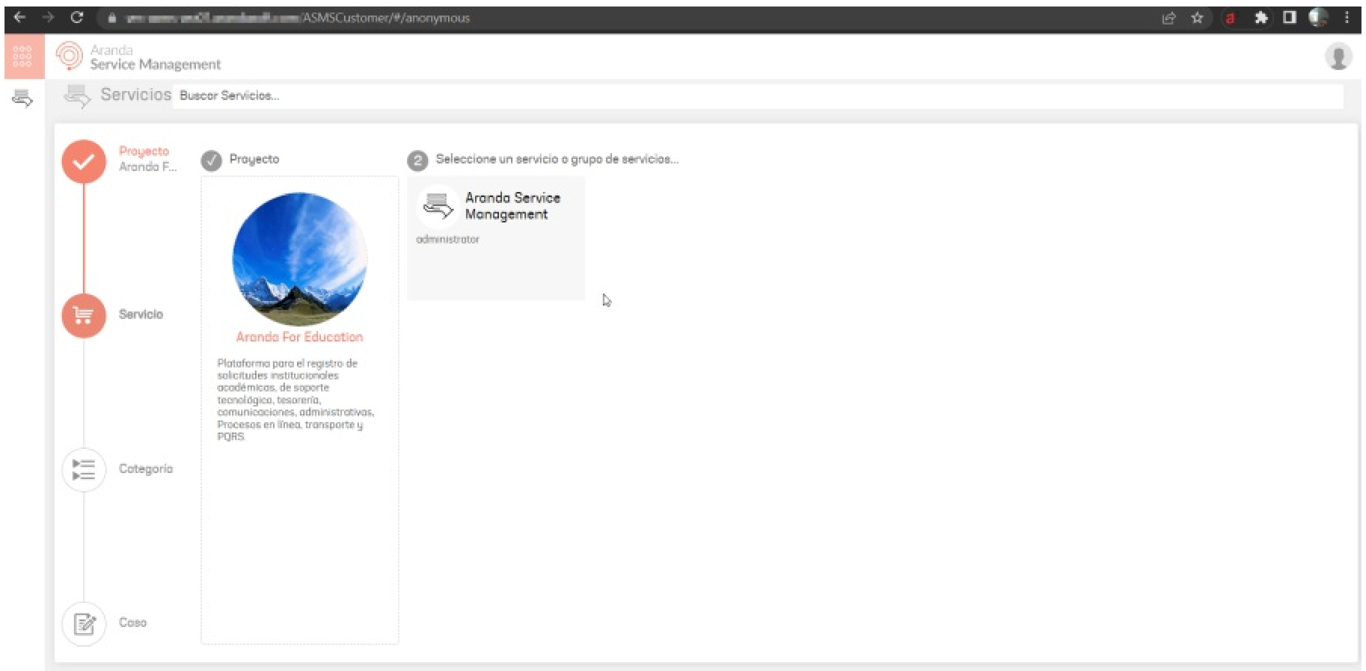
If there are one or more cases that match each of the criteria, the user is informed, indicating the list of cases found as possible duplicates.

The user will have the options to add a public note for all the cases in the list or continue with the creation of the new case.

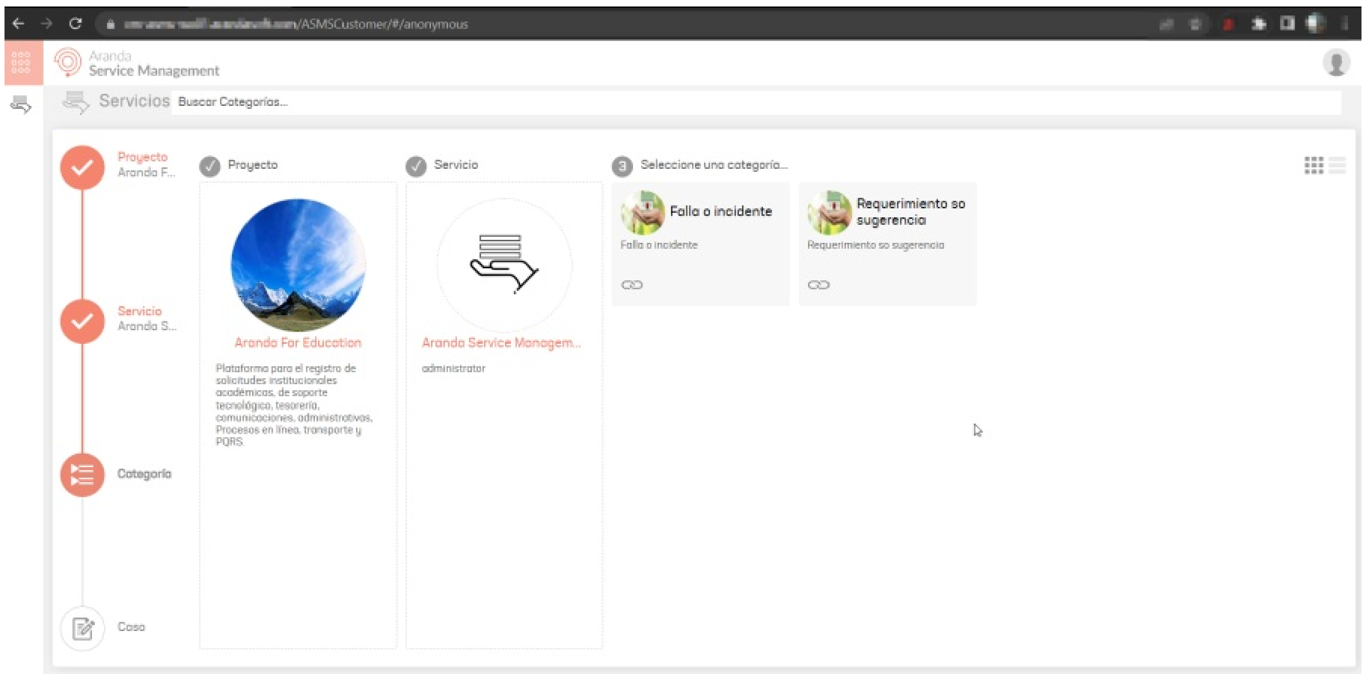


Creating cases "anonymously"

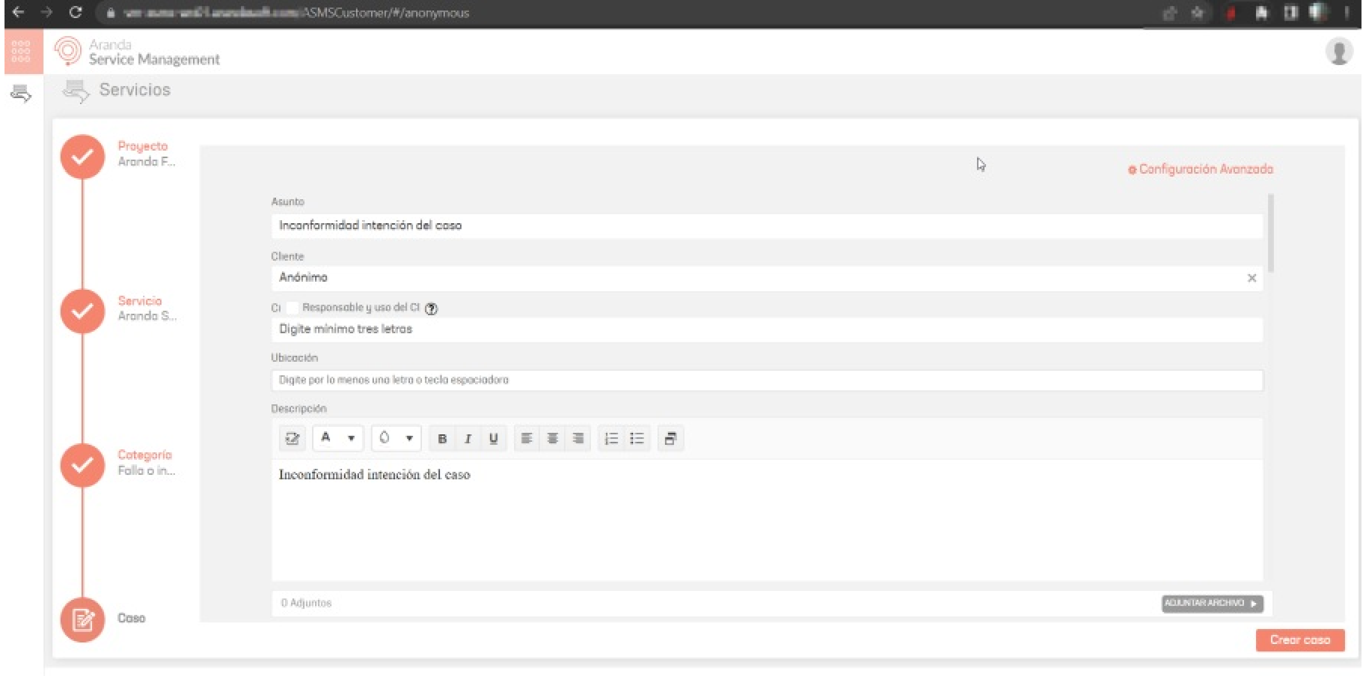
To create cases, access the user portal anonymously and choose the service on which you are going to create the case.



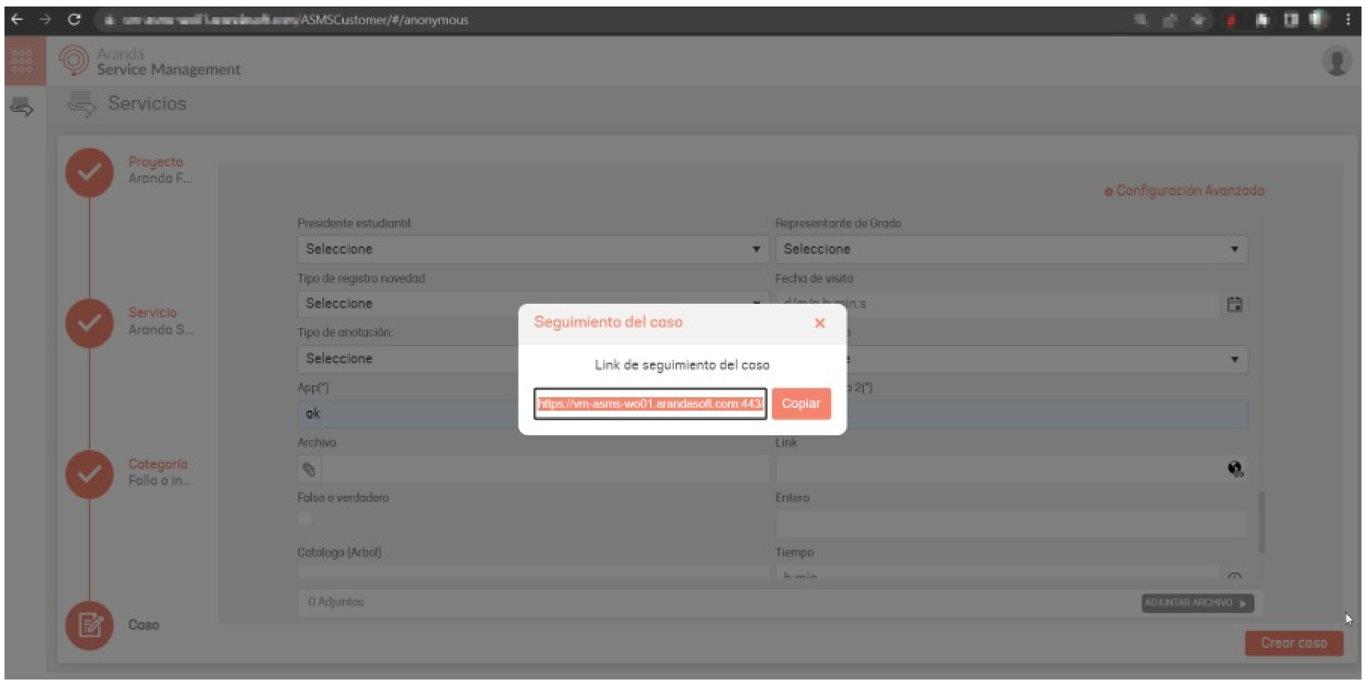
Choose the category you want to create the case over.



The case creation form is enabled, where you will be able to enter the subject, case description, and fill in the additional required fields. You will also be able to attach the necessary files.



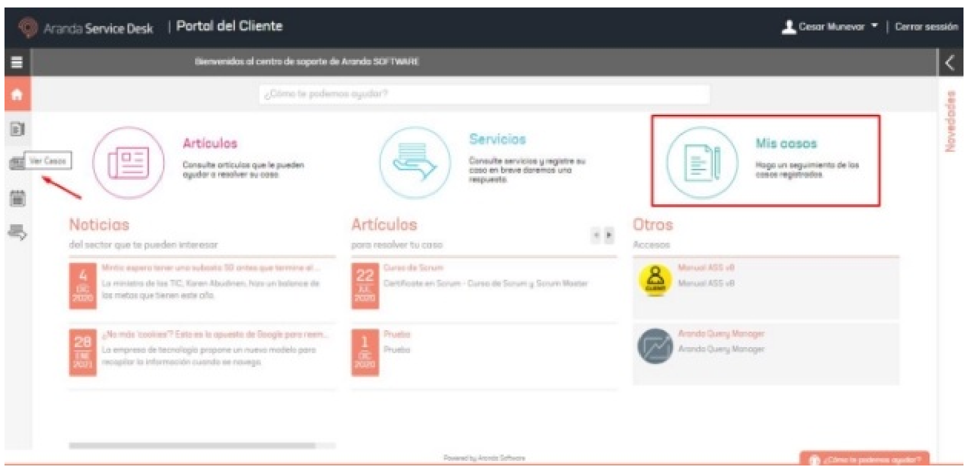
Selecting the "Create case" button confirms the creation of the case and enables a window with the case tracking link. Copy and save this link, as it is the only means to track the case.



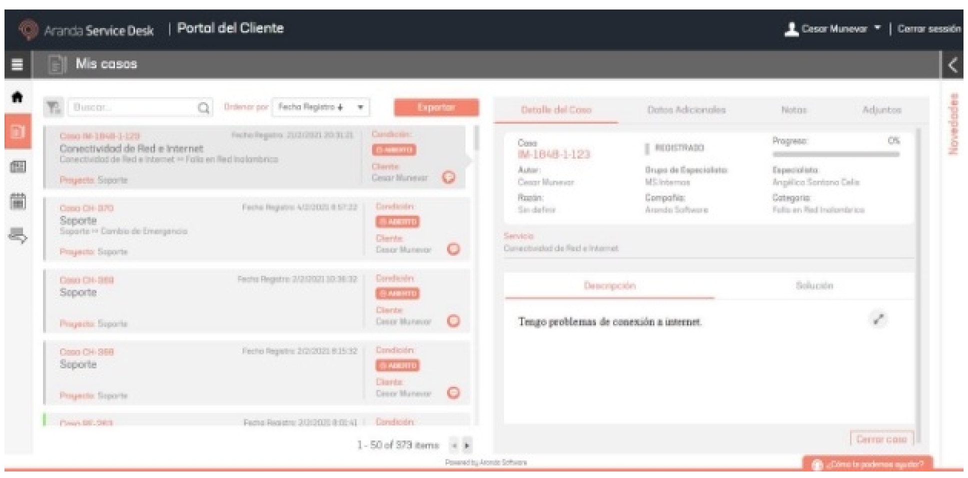
Consult cases

Consult cases

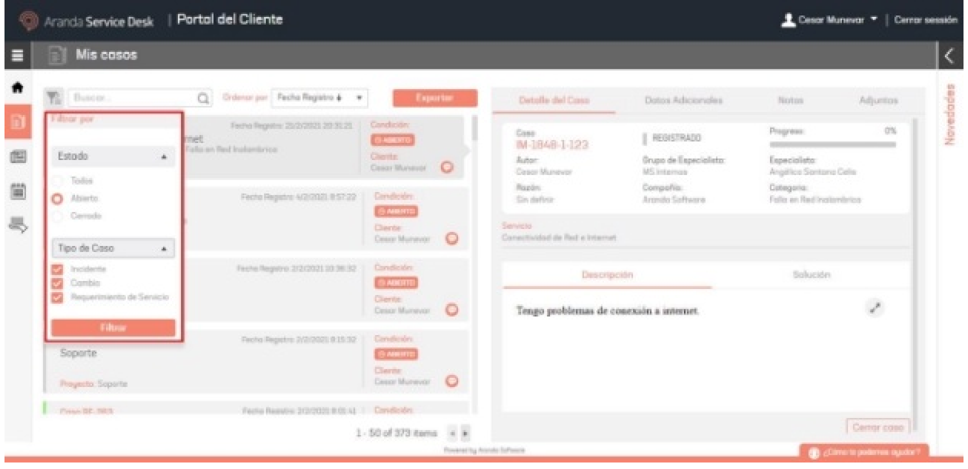
To view a case, click My Cases. You can also access it from the View Cases in the left pane of the console.



The list of cases you have registered will be displayed.

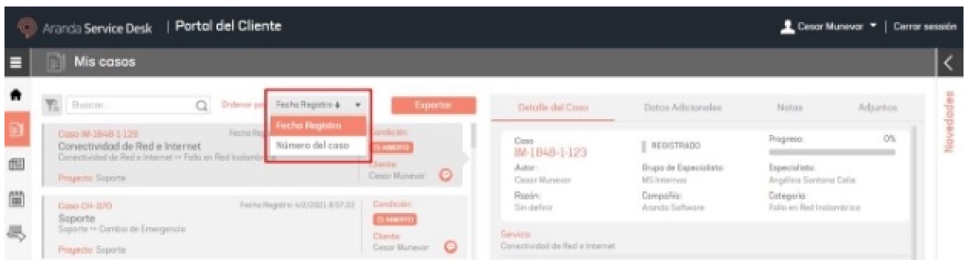


You can filter the list by case status (open, closed, or all) or by case type (incident, change, or service requirement). To do this, click on the filter button and mark the criteria by which you want to filter the list.

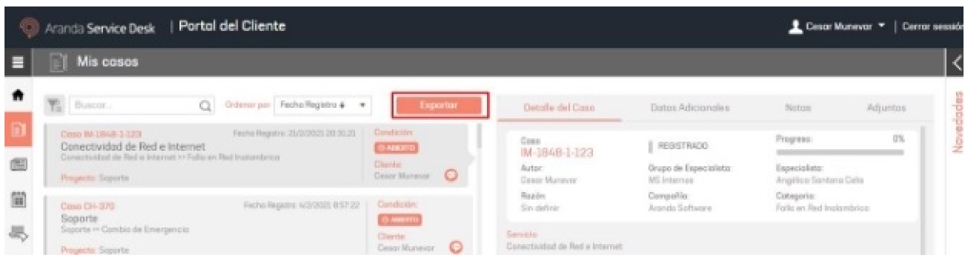


Use the search bar at the top to search for cases by case number, subject, or description.

You can sort the list of cases by date in ascending or descending order and by case number. To do this, click Sort by and select the criteria by which you want to sort.



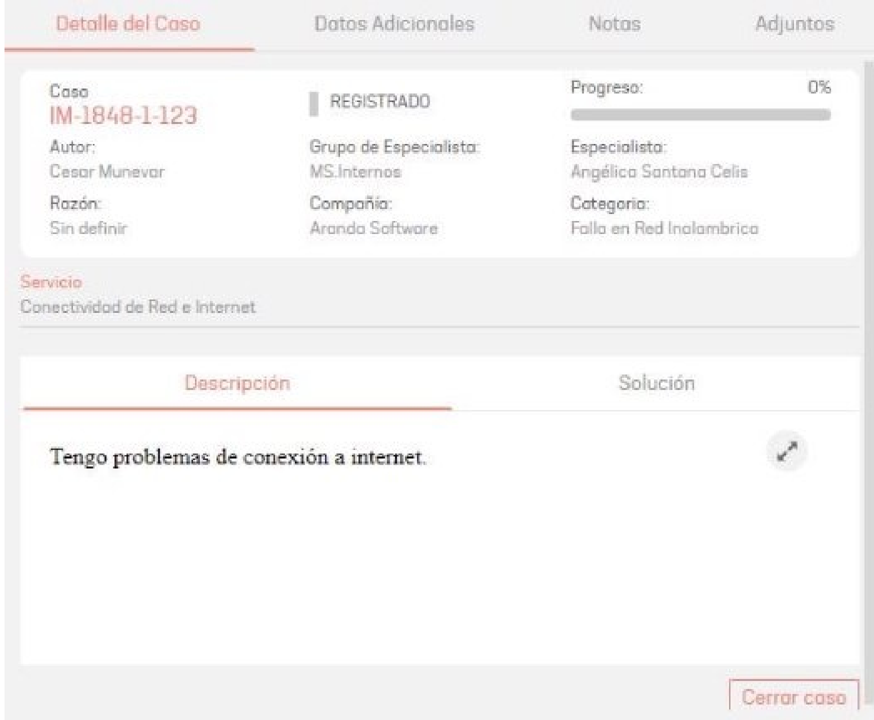
To export the list of cases, click on the Export at the top of the screen.



Fill in the file name and click the Save.**

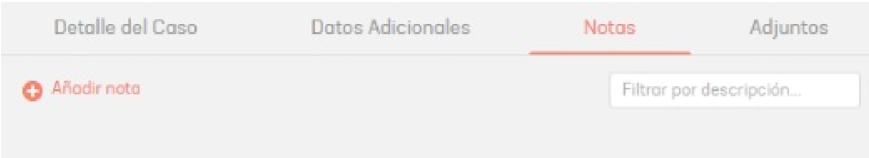
When you select a case, on the right side of the screen you will see the Case Detail, Additional Data, Notes and Attachments.

The tab Case Details Present the basic information of the case.

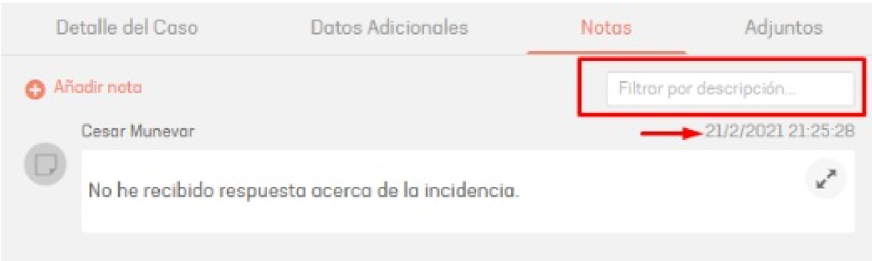


On the Additional Data You can view or modify additional case information.

On the Notes You can view or add notes related to the case.



Use the filter bar to search for notes by their description. Each note added will show the date it was created.



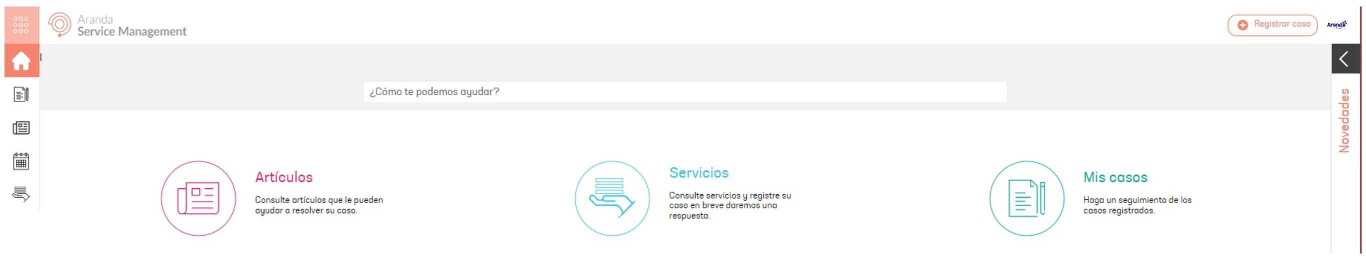
On the Attachments You can view or add files related to the case.

View knowledge base articles

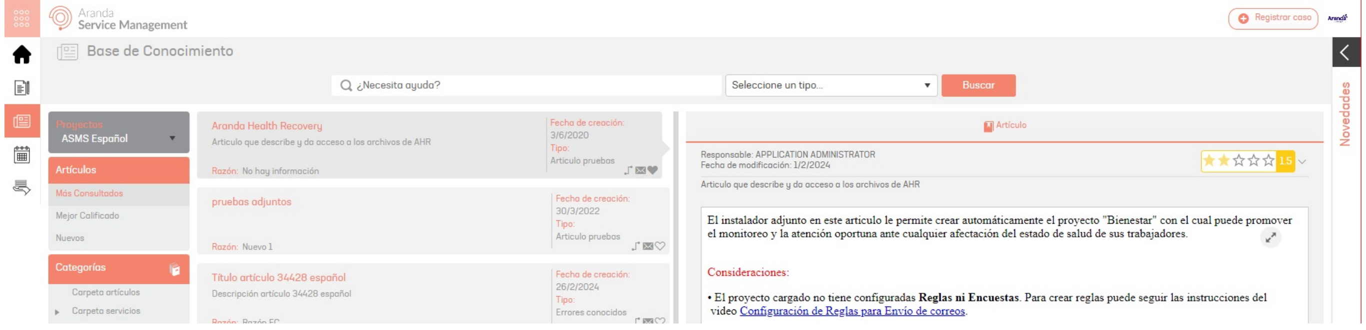
View knowledge base articles

Aranda's knowledge base contains articles that provide useful information related to the services offered to clients.

To view published articles, click Articles on the home page; You can also enter from the console's main menu. In the information view, the list of available items and the corresponding information will be displayed.

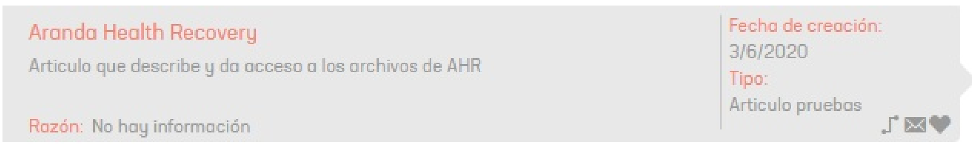


In the top article menu, you can search for articles by keywords and type.

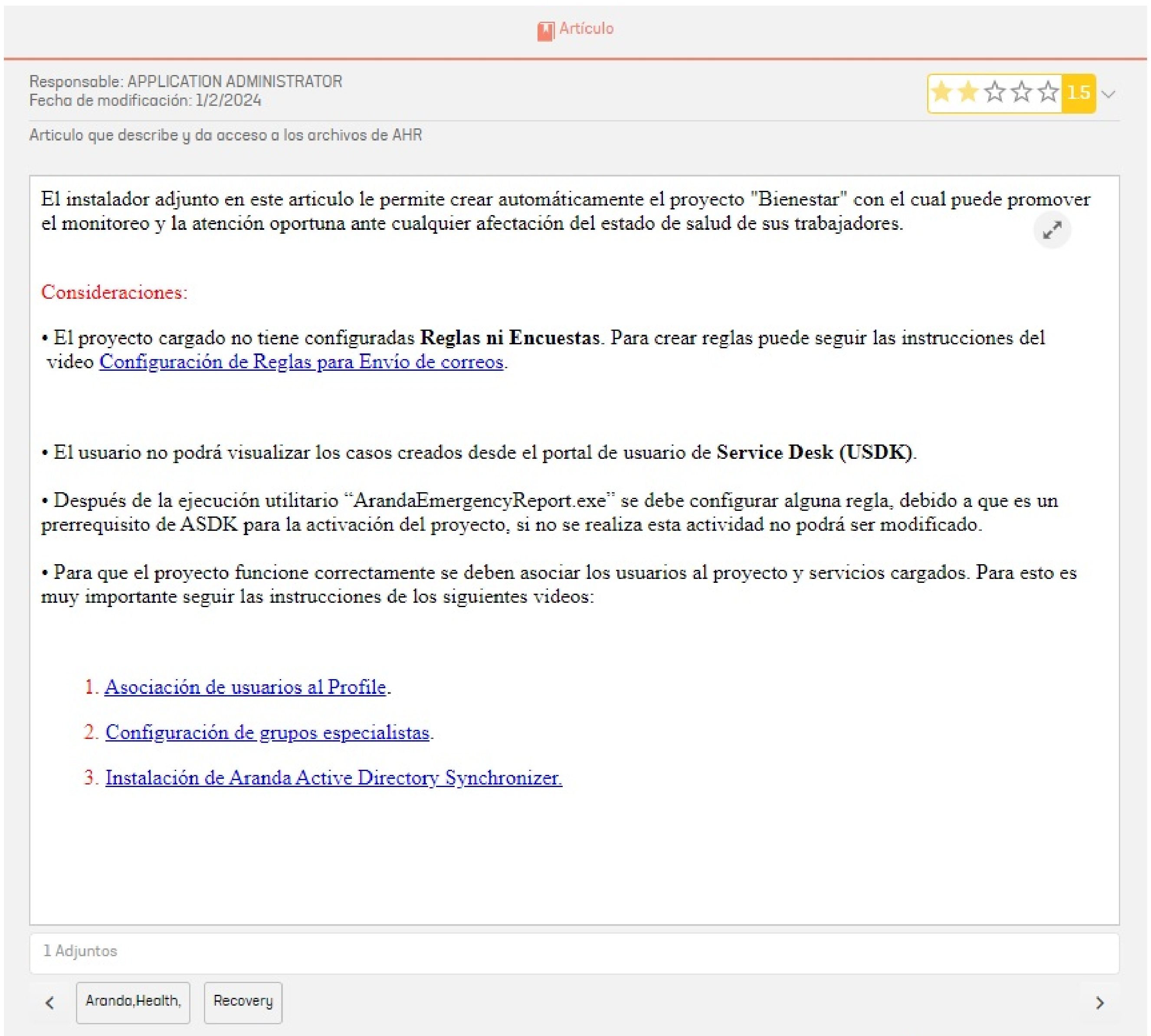


In the articles menu you can filter articles by project, Most Viewed, Top Rated, New, and Categories.

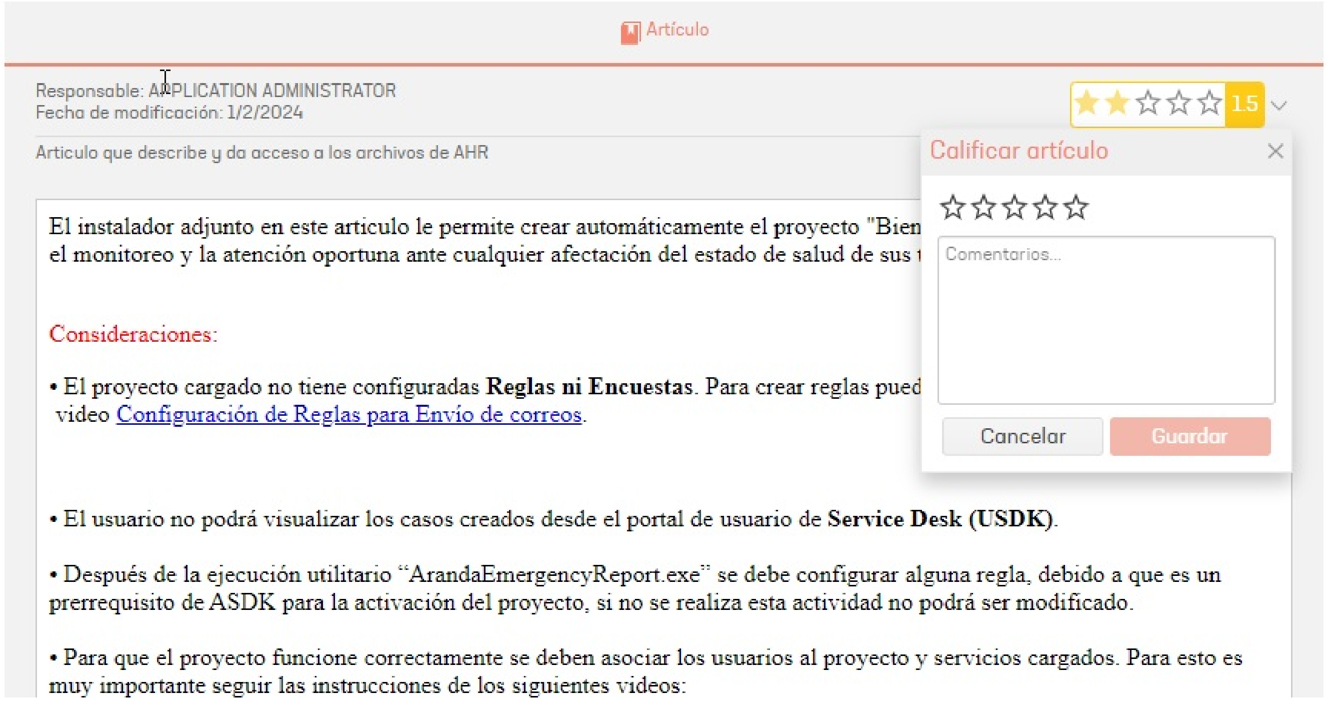
In the card detail for each article there are three icons that allow you to view related articles, mail it and add the article to the favorites list.



The article information view displays the name of the person responsible for the article, the last modified date, the description, and any attachments. You can expand it by clicking



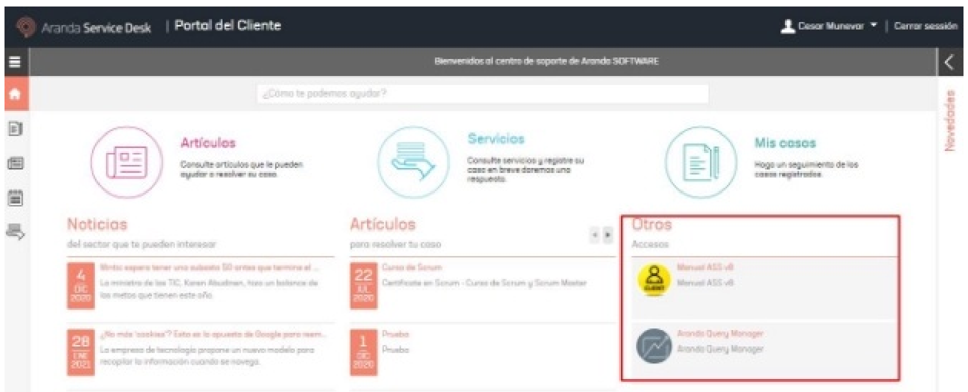
You can give the article a rating and add comments.



Other accesses

Other accesses

This section allows you to directly access other related websites.

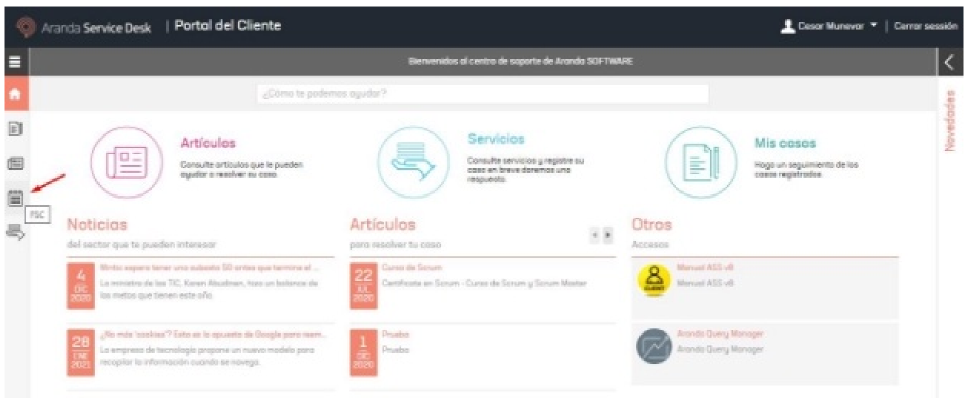


Change Schedule (FSC)

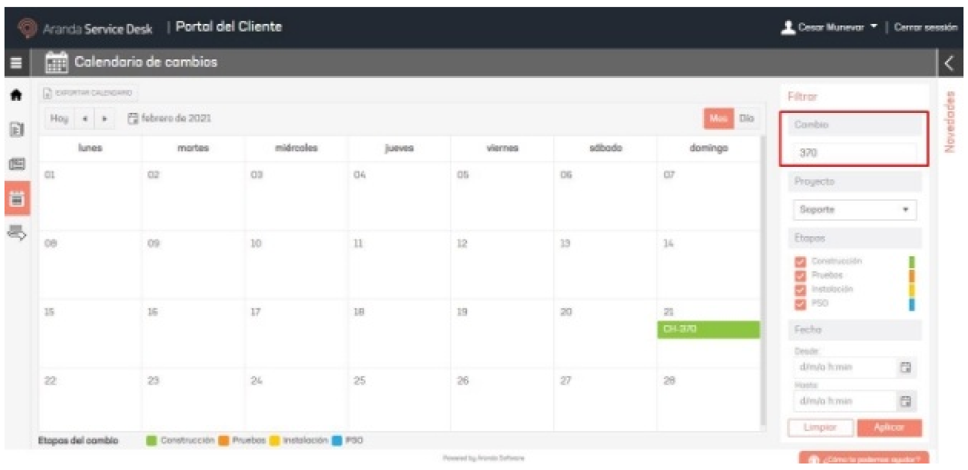
Change Schedule (FSC)

The Forward Schedule of Change (FSC) allows you to visualize the schedule of changes that were approved with their respective dates for each of the stages.

To access the calendar, click on the FSC in the left pane of the console.



The change schedule will be displayed. In the right pane you can apply filters by change number, project, stages, start date, and end date.

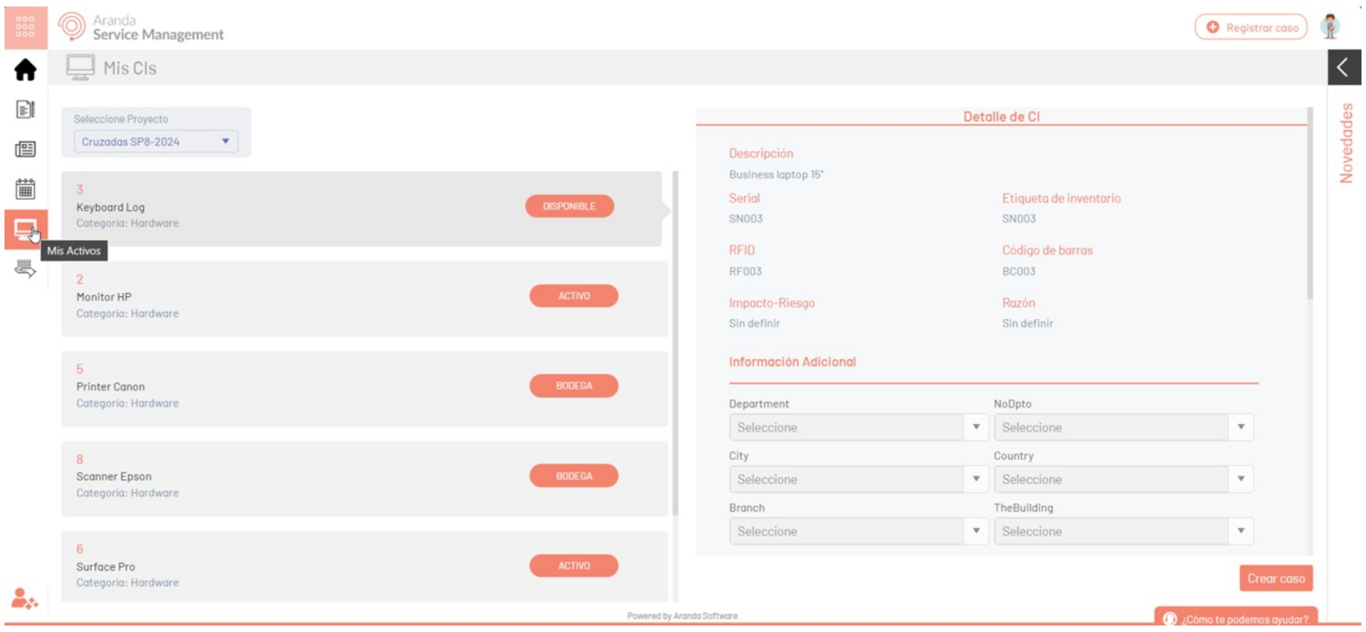


My Assets

My Assets

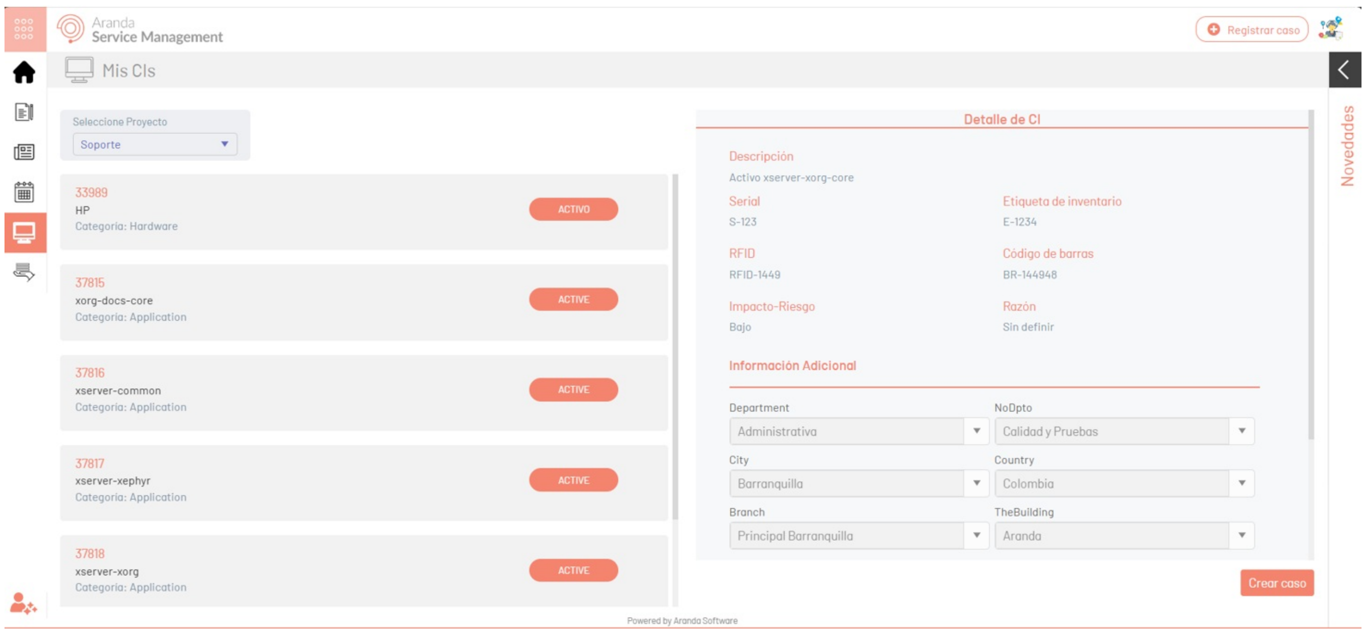
My Assets

This functionality allows the user to visualize the Cis of which it is responsible or makes use. The listing provides an organized view of the assets associated with the user.



Steps to view the associated assets:

1. Click on the My Assets section.
2. In the My Assets view, the CIs for projects that the user is responsible for or makes use of will be displayed.
3. Each IC in the list is presented on a card that shows: ID, name, and category.
4. When you select an IC, detailed information about it is displayed.

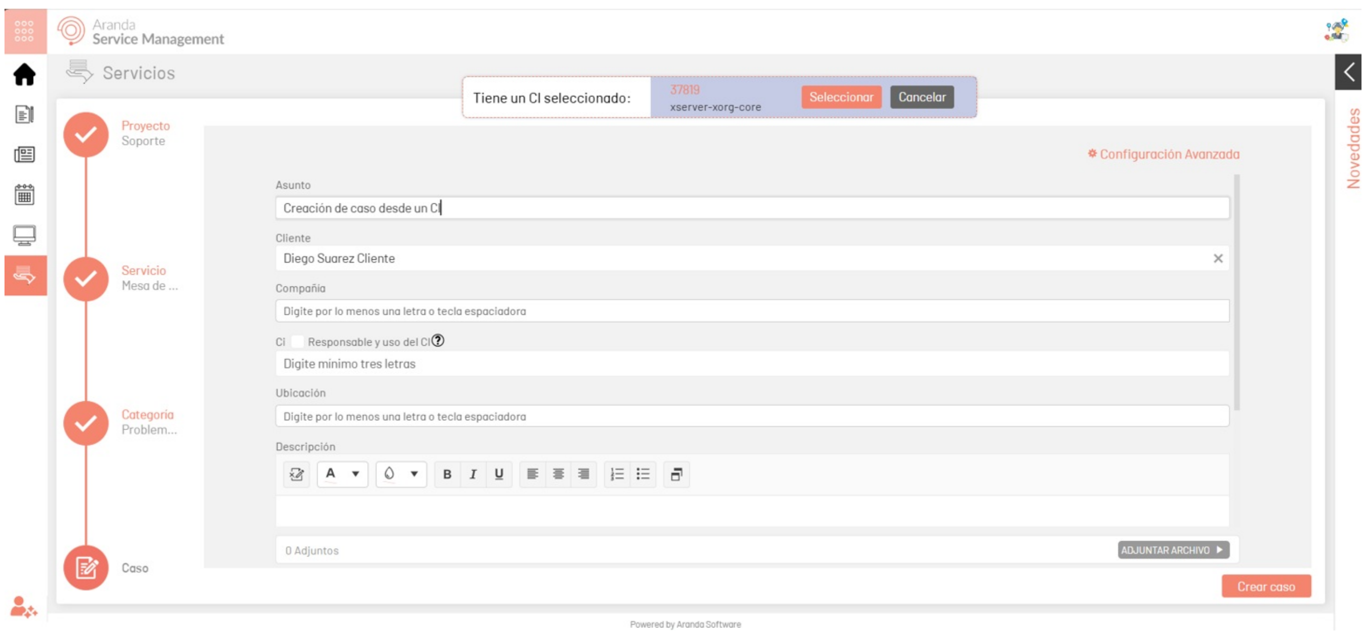


Create Case from a CI

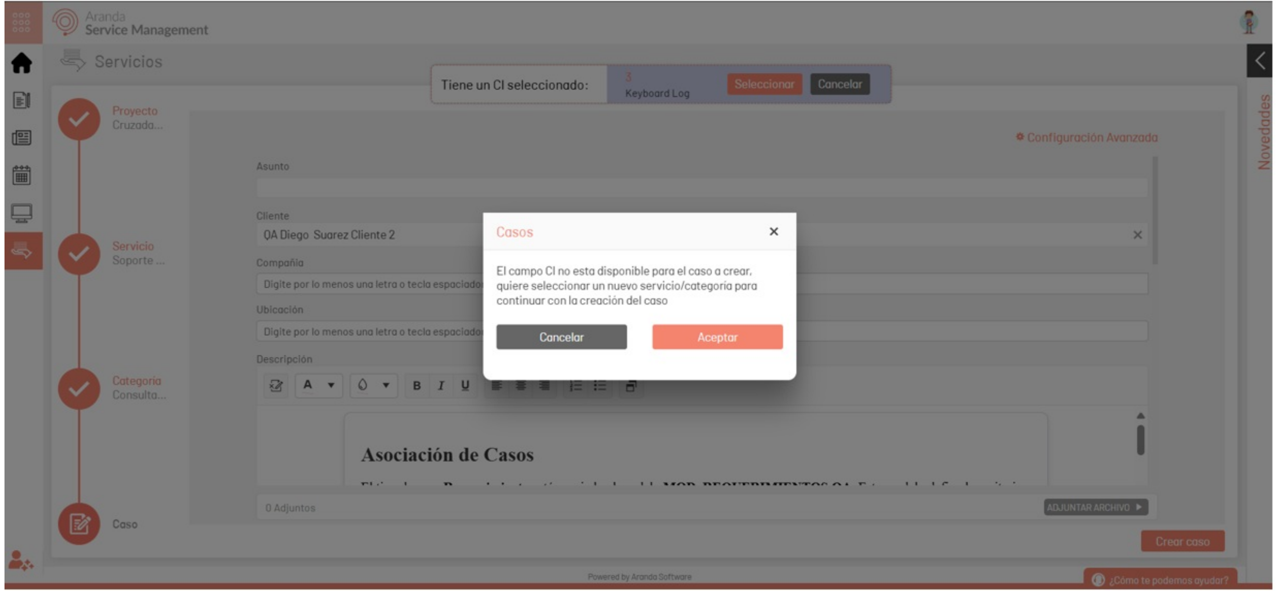
To start the process of creating a case, click the *Create Case. The case creation window is enabled, where you can select the service, category, and case type.

At the top, a label will be displayed with information about the CI selected. To associate it with the case being created, click the Select.

Clicking on the Cancel, the console will return to the session My Assets, where you can select another CI to start the process of creating a case.



⚐ Note: If on the console ASMSAdministrator, in the Service Management > Interface, you configure a service type and operating model that do not allow the CI to be displayed in the Customer console, when you try to create a case, a message will be displayed indicating that the field is not available.



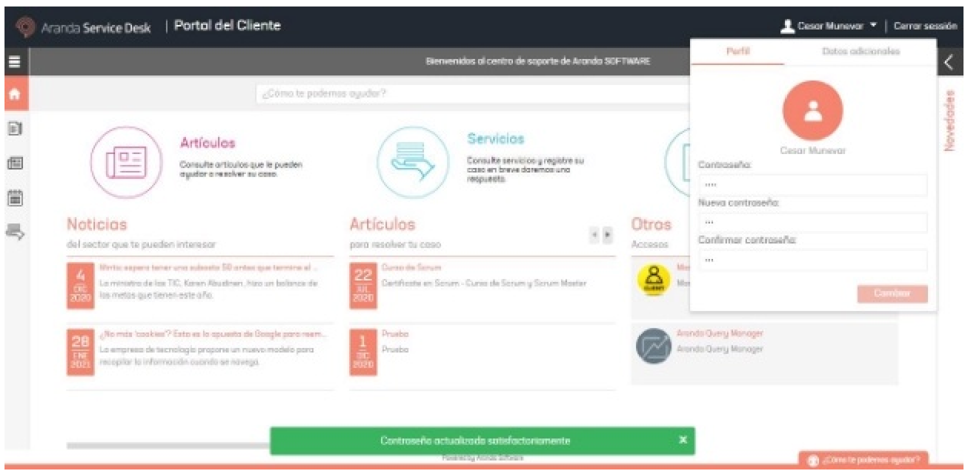
The user will have the following options:

- Clicking Cancel will return you to the My Assets view to select another CI.
- When you click OK, you can return to the services view to select a different service and category that has the CI field enabled.

Edit User Details

Edit User Details

From the Client Console you can change your password and additional user information. To do this, click on the user at the top right of the console, update the information, and click Save.



Password Change

When you change your password, you take into account the settings you made in the password policies in the administration console (ASMSAdministrator).

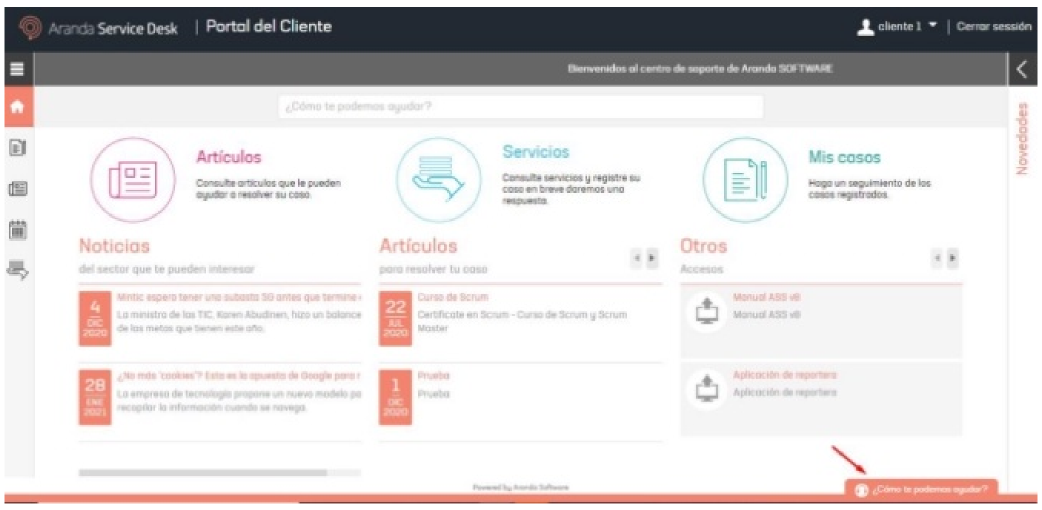
To perform the password change, enter the current password and the new password; It must comply with the established policies to confirm the new password. By entering the new credentials you will be able to save the new data.

⚐ Note: Updating the password no Applies to domain users, this type of user will only be able to update additional data.

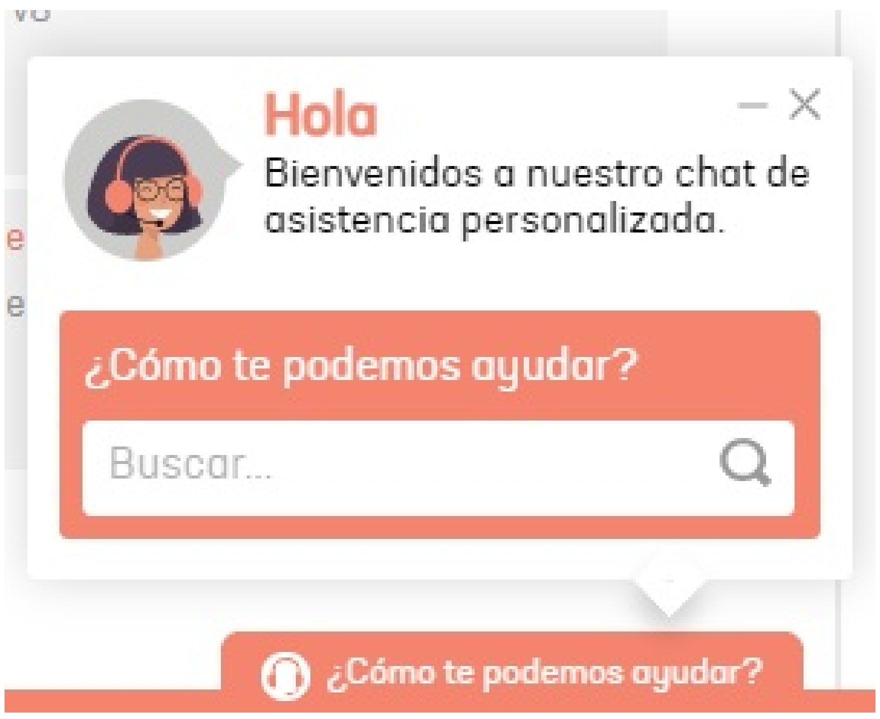
View and create cases via chat

View and create cases via chat

To access the personalized support chat click on the How can we help you? at the bottom right of the console.



The chat welcome window will be displayed.

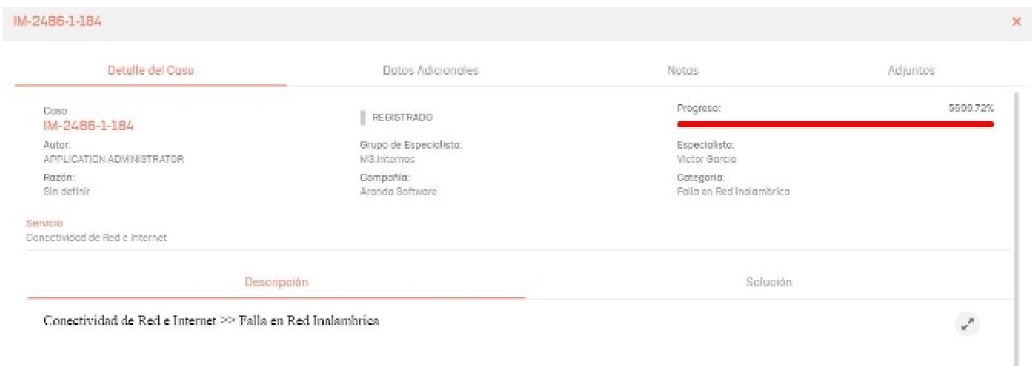


Before starting a conversation with a specialist, you can view the cases recorded by case number, service, category, or subject. You can also search for services or categories to create cases and view published articles.

To view a case by case number, type the number and press the Enter key.

Click on the case to view the basic information of the case.

Click the Case Detail to see the complete information of the case.

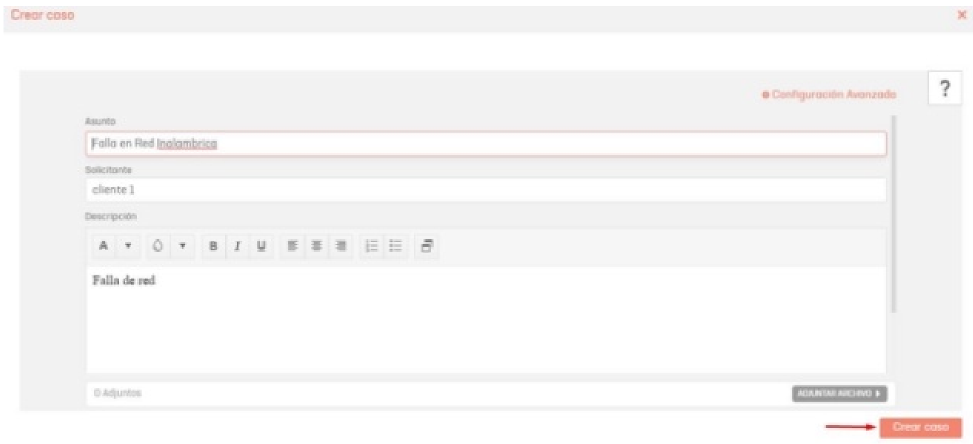


Click the Historical to view notes added to the case. You can also add new notes by clicking the Add Note.**

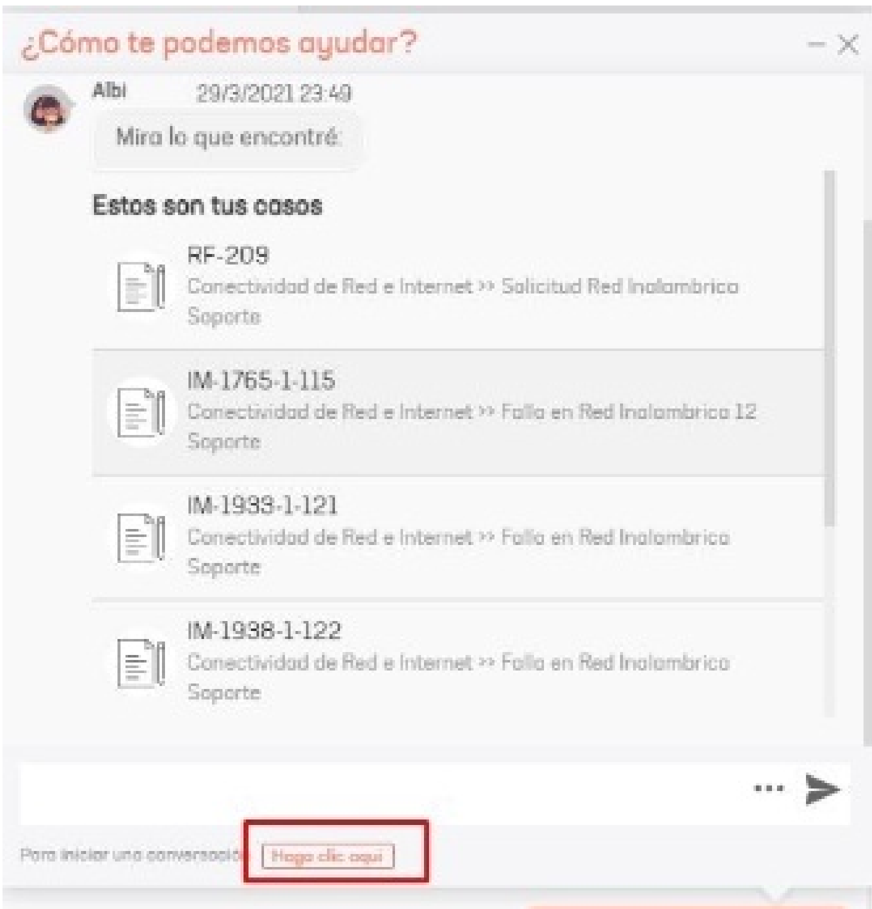
To create a case via chat, type in the name of a service or category and press the Enter key.

Select a service or group of services, and then choose the appropriate category.

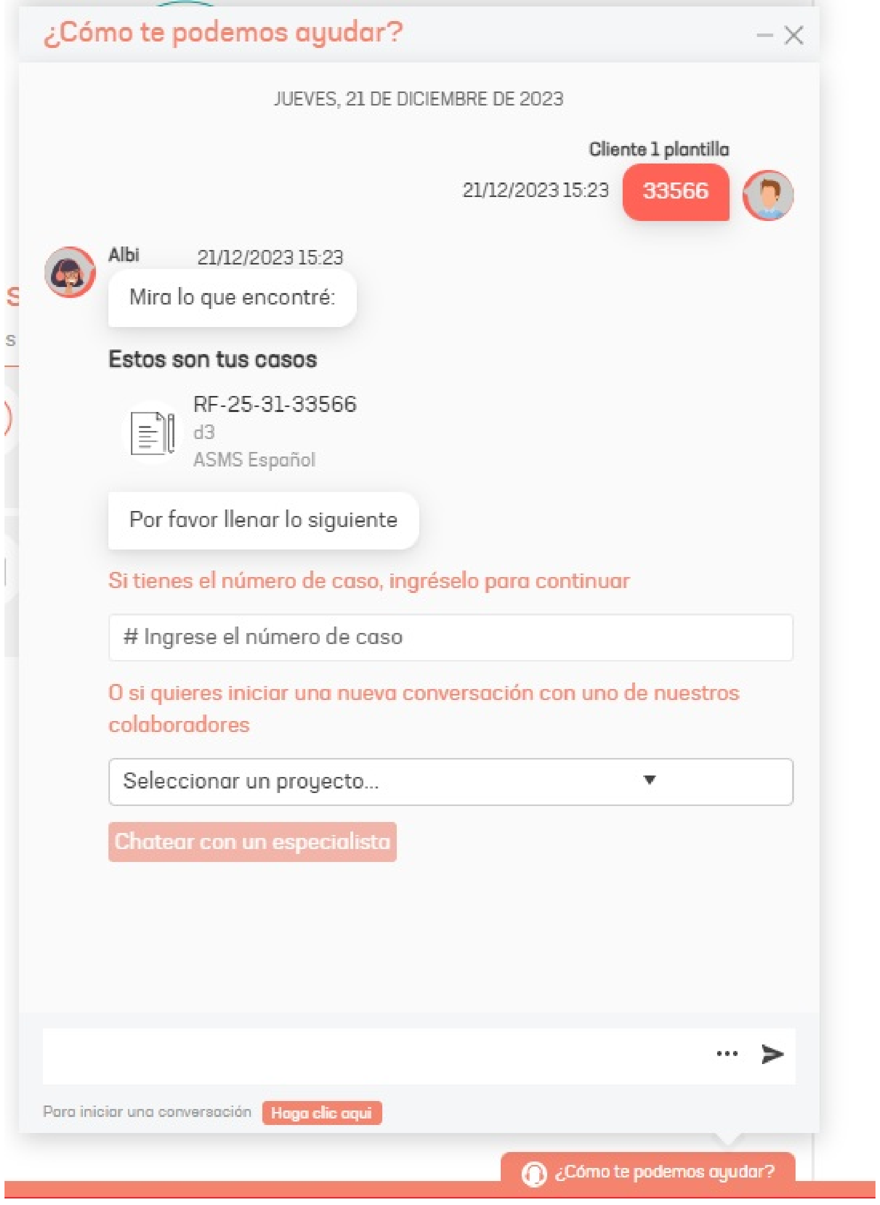
The form to create the case will open, fill it out and click on the Create Case.



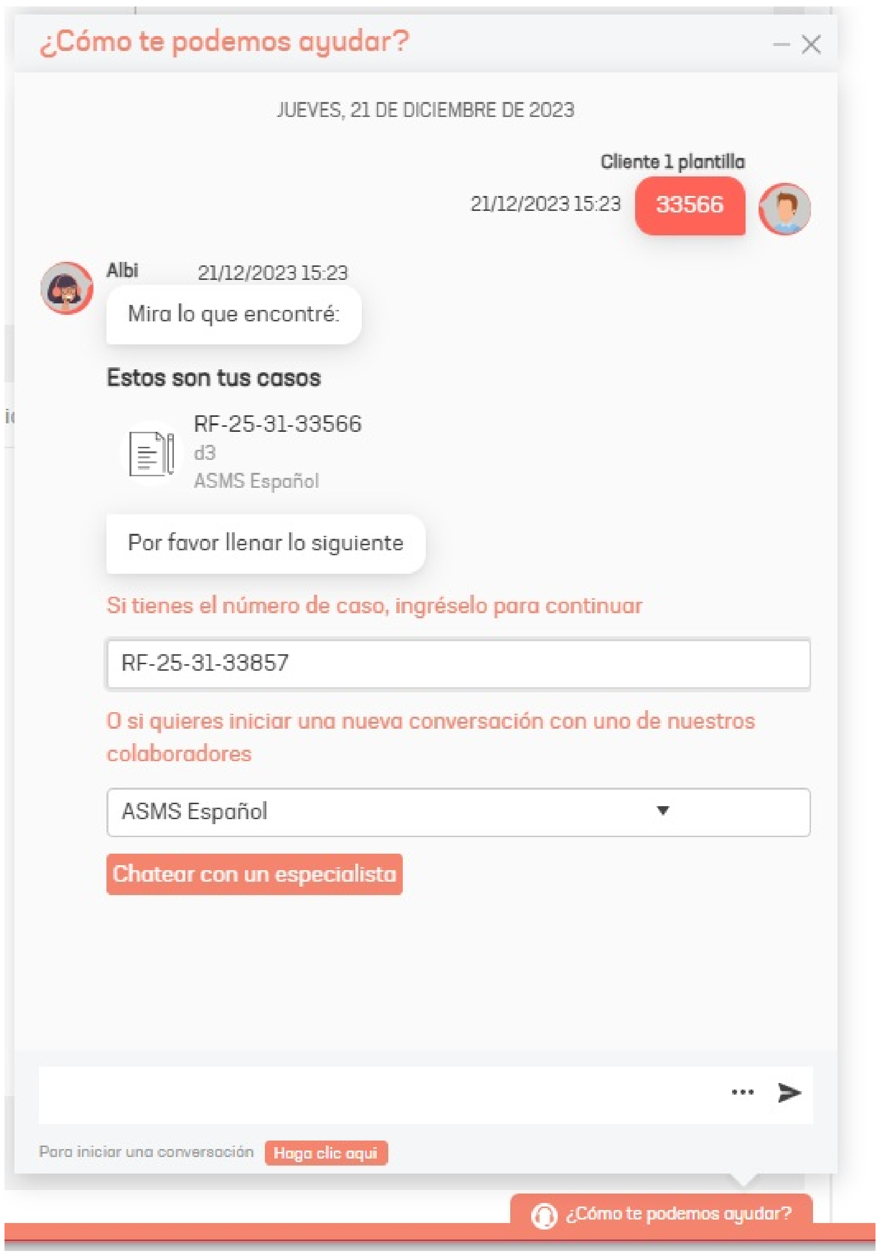
If you want to start a conversation directly with a specialist, use the Click here.



The following window will be displayed:

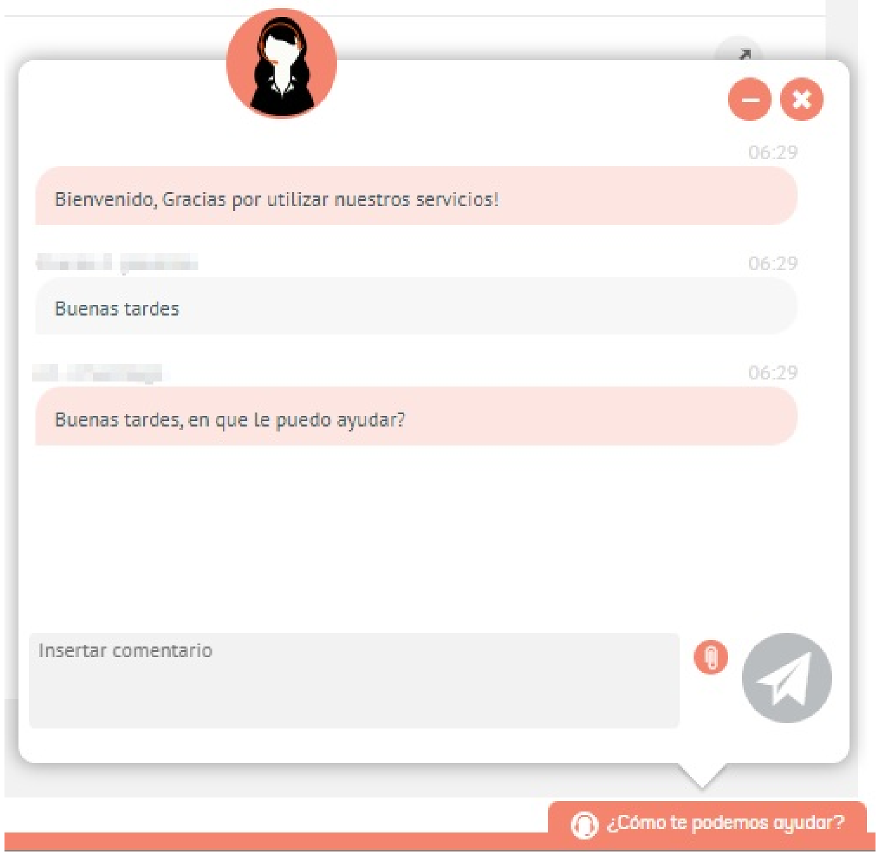


To query a specific case, type the case number, choose the project and click on the Enter.



Note: The search for cases is only done on cases that are open.

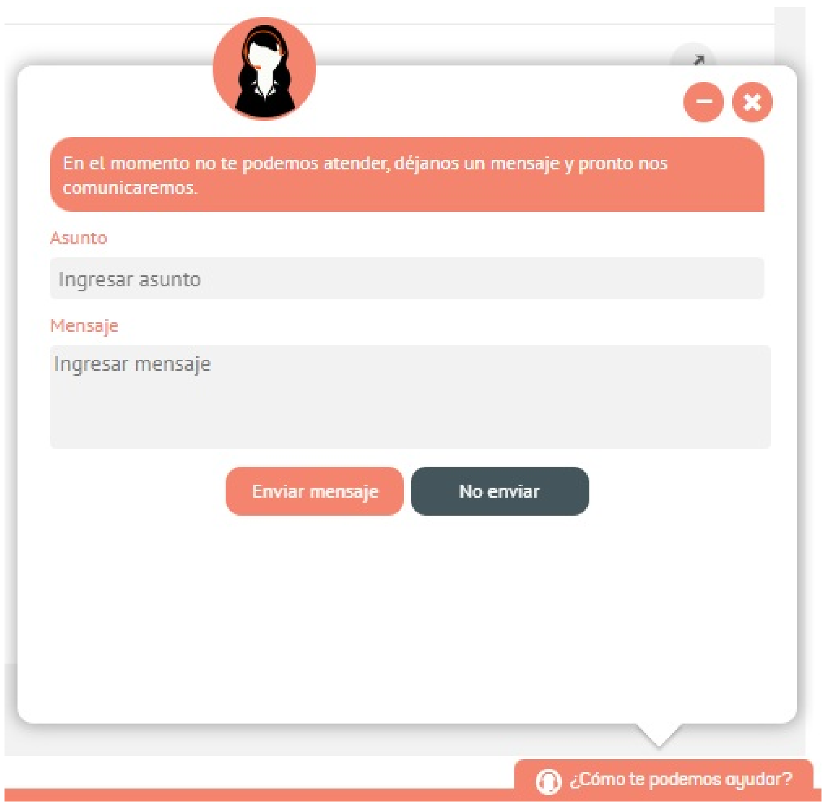
During the conversation you can send files to the specialist by clicking on the attach icon.



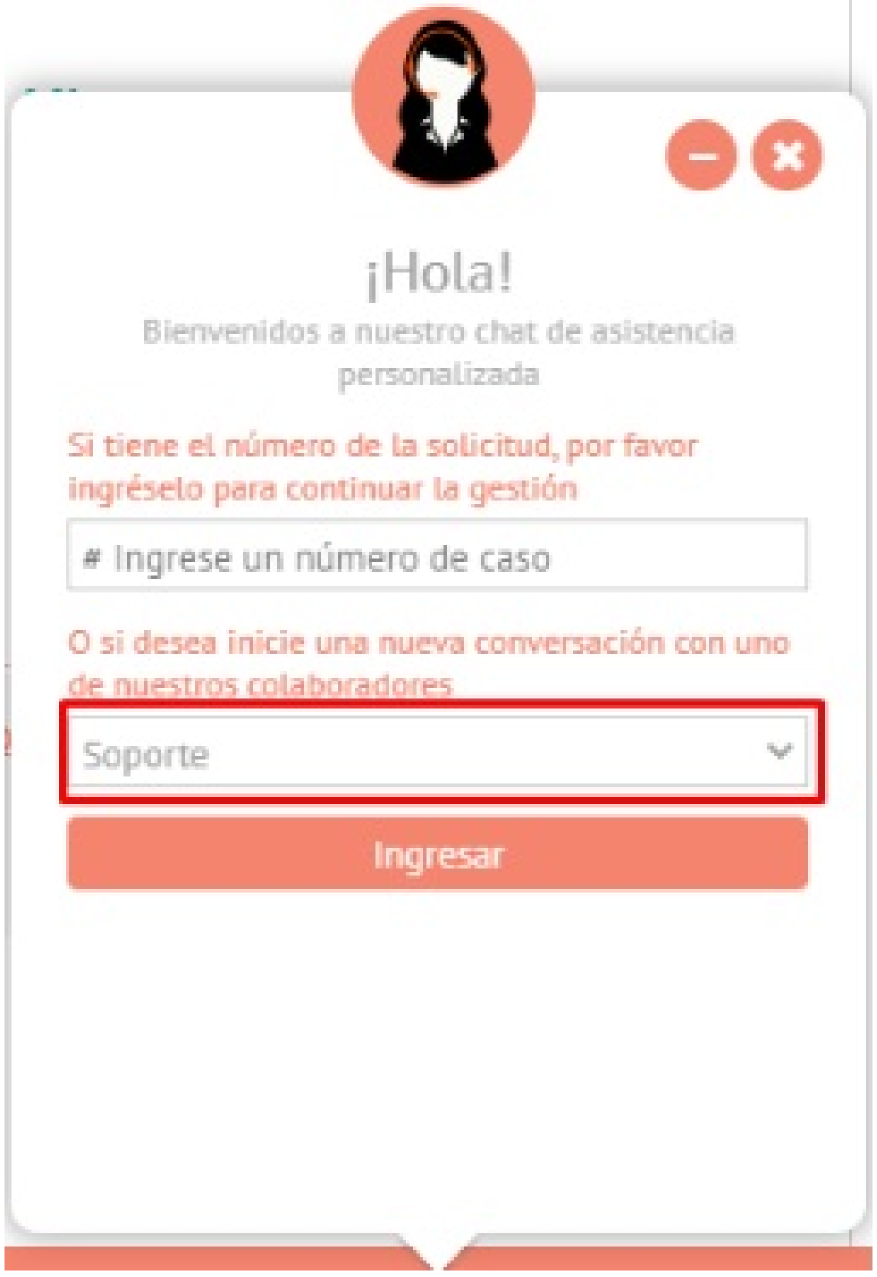
At the end of the conversation, the window to rate and comment on the service will be activated.

⚐ Note: The conversation will be added to the case history.

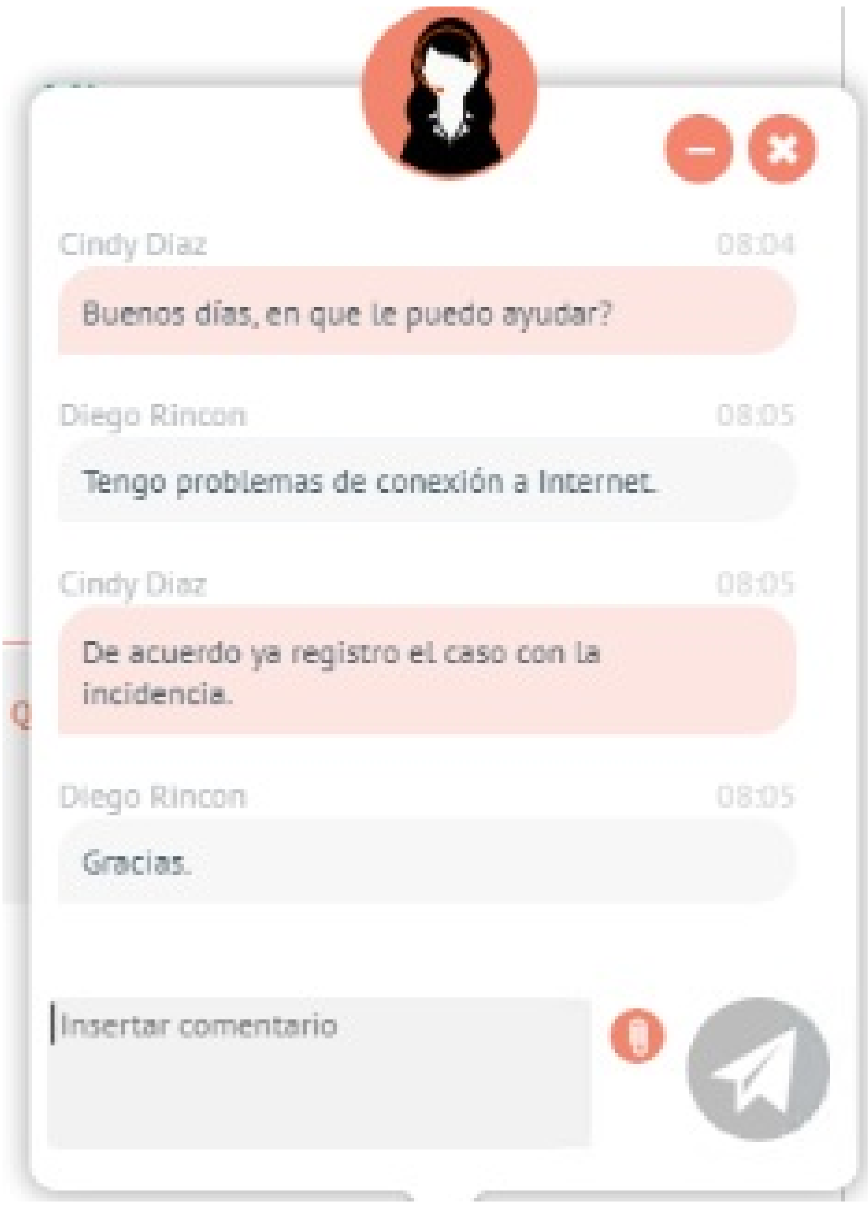
In case a specialist is not available at the start of the conversation, you can leave an offline message, which will be added as a note to the case. Alternatively, you can wait for a specialist to become available to start the conversation.



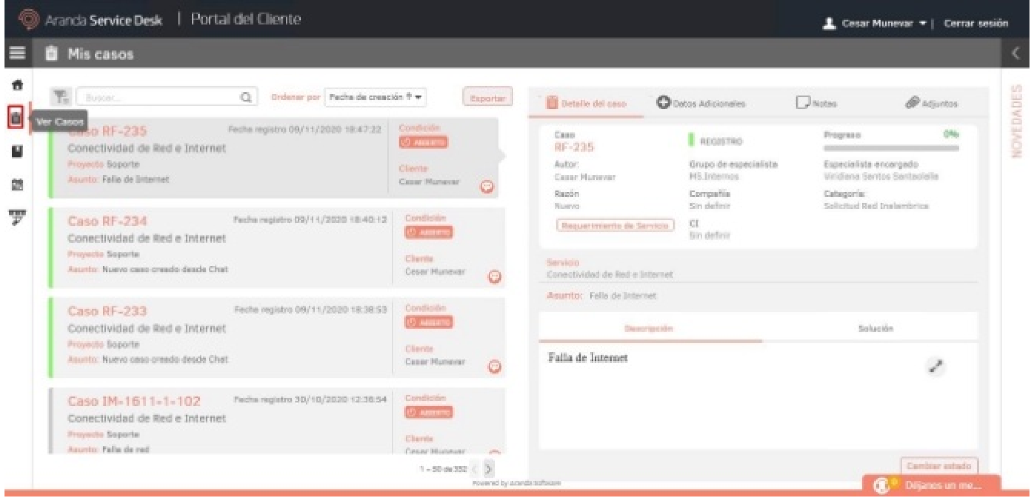
To create a case via chat, in the chat welcome window select the project and click the Enter.



During the conversation, the specialist will create the case for you.



At the end, after qualifying the service, you can consult the case in the View Cases.



If a specialist is not available in the chat, you can leave a message. By clicking Send message The case will be created automatically and you can consult it in the View Cases.

Referencing Attendee

This option allows referencing the assistant in a browser tab from an external site (intranet), this will allow the client console assistant to be called without having to enter it.

The user using the wizard can perform the same actions available in the wizard within the client console.

To make the correct call of the wizard, the following configuration must be made:

- The option must be activated AllowExternalChat in the Admin console in General Settings/Settings/ServiceDesk.
- You must have an integration token that will allow you to obtain an identity token for the user who makes use of the wizard.
- To obtain the identity token for the use of the wizard, the following POST request must be sent: https://dominio.com/asmscustomer/service/api/v9/externalproviders/token, the headers must include X-Authorization with the value Bearer + Integration Token and in the body of the request the user's email, example:

	Key	Value
☑	X-Authorization	Bearer token

```
{
    "Email": "correo@mail.com"
}
```

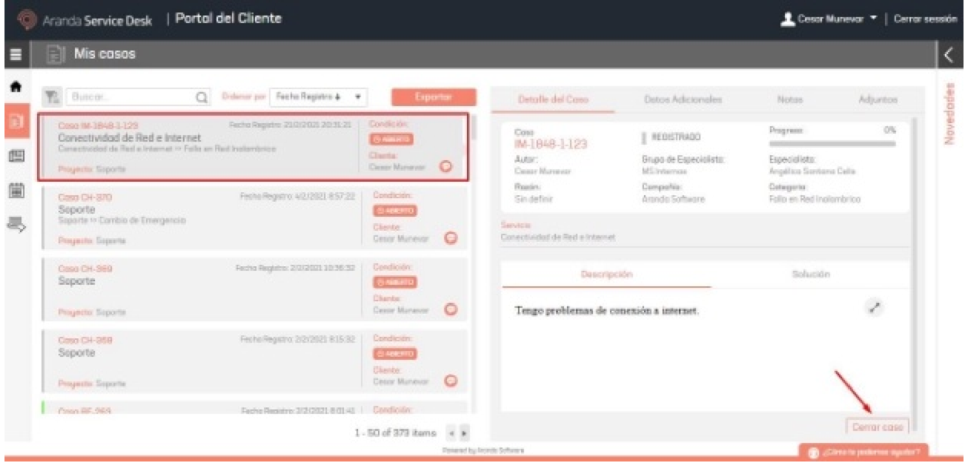
- Once you have the identity token, it must be sent in the following POST request https://dominio/asmscustomer/index.html#/chat/id_token=+tokenIdentity.

⚐ Note: The user using the wizard can perform the same actions available in the wizard within the client console. The user to be used for the generation of the identity token must be named.

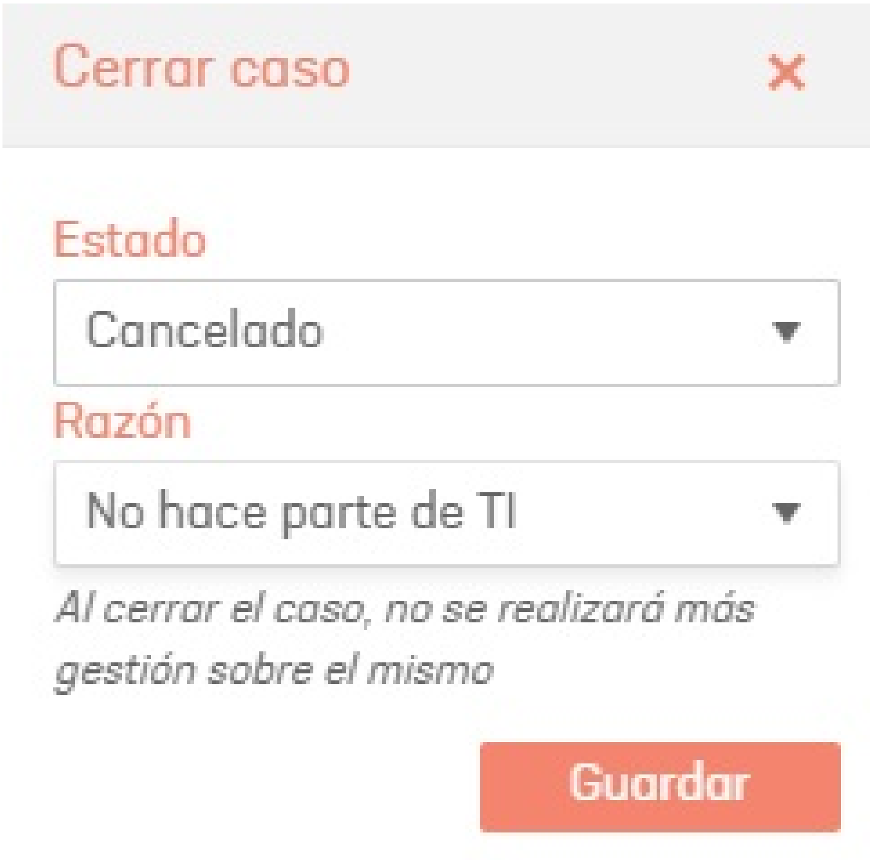
Close a case

Close a case

To close a case registered by you, go to the list of cases. Select the case you want to close and at the bottom right click Change status.



In the window that pops up, choose the state Closed and click the Save.



⚐ Note: The option to change status and/or close case will only be available if the respective permissions are assigned from the configuration console.