



Reference and Training Guide
Self-Help Portal



DecisionOne Corporation
426 West Lancaster Avenue
Devon, PA 19333

20080506

Table of Contents

1. Self Registration.....	3
2. Open New Service Order	4
3. View Service Requests	8

1. Self Registration

Step	Action	Input Data	Result	Comments
1.	Open Web Browser and go to URL XXXX	(URL) See Comments		https://astea.decisionone.com/AsteaAlliance80_Self-Service/
2.	Respond to the message in comments-	Click on X, Allow, or Don't allow.	Taken to Login screen	"Do you want to allow this web page to access your clipboard?"
3.	Click on First Time User? <u>"Register Now"</u>		Taken to Self Registration Web Page Dialog box	
4.	Enter Company ID in the <i>Company ID</i> Field	E8564712		Obtain from DecisionOne Program Manager or Account Representative.
5.	Enter Self Registration Code in the <i>Access Code</i> field Click on Submit	18655272		Obtain from DecisionOne Program Manager or Account Representative.
6.	Change the Contract ID To the user name EX: dawnski			Note: This will be your Login ID.
7.	Enter First and Last Name of person requiring access			
8.	Enter Contact Phone number			
9.	Double-click Lock symbol under <i>Access and Security</i>			
10	Enter 1-8			Note, at least 1-character must be upper case

	character Password			
11	If desired enter a Favorite Question and Answer to be used if Passwords are forgotten			
12	Click <u>Save</u> and <u>Continue</u>			
13	Be sure to Click " <u>Log Out</u> " to exit			

2. Open New Service Order

Step	Action	Input Data	Result	Comments
1.	Open Web Browser and go to URL XXXX	(URL)		
2.	Respond to the message in comments-	Click on X, Allow, or Don't allow.	Taken to Login screen	"Do you want to allow this web page to access your clipboard?"
3.	Enter User ID and Password			
4.				
5.	Taken to Self Service "My Engagements" screen			Here you can view all your current open service requests.
6.	Open New Service request (If SN Item)	Click on " <u>New Service Request</u> "	New Service Request Screen	
7.	Select Proper Site	Click on <u>ellipsis</u> next to "Site ID:"	Taken to popup "Site Company Tree Lookup"	Click <u>Clear</u> , middle box on right hand of popup
8.	Easiest way to find correct site	Enter partial or customer name in <i>description field</i> and press search	Lists all your customers with, or beginning with, the name you typed	Narrow it down by also entering the city.
9.	To open a call using the old	Click on the		The new Astea system has new site numbers,

	DecisionOne site#	<p><u>“Alias” box</u></p> <p>In the “Description” field, enter % followed by the old site#</p> <p>Press Search</p>		<p>called Site ID’s. However, the old DecisionOne Dispatch Data Gathering (DDG) system site numbers have been loaded into Astea as Aliases and can be used to search for the appropriate site. If you know that 13-character ID number you may also enter it in the Site ID field with no other boxes checked and it will return the appropriate site as well.</p>
10.	To open a call using the new DecisionOne/Astea site#	<p>Enter the <u>13-character Astea Site ID</u> number in the <i>Site ID field</i></p> <p>Press Search</p>		
11.	Click on the <u>appropriate Site number</u> listed on the left to continue		<p>Takes you back to the initial “New Service Request” screen with the correct location selected</p>	<p>**If you have selected a Catchall, Click on the eraser above the address section and enter the Service Site Name and Service Site Street Address, City, State and Zip Code</p>
12.	If No equipment loaded or no Serial Numbers match -	<p>In “Product/Item section, click on <u>“Product”</u> to highlight it and enter the word “SITEITEM”</p>		<p>This is a Procedural Requirement to insure the proper SLA is established for the call.</p>
13.	In the Serial No.: Field directly below -	<p>Click on the Elipse -</p>		<p>The Serial No. for the SITEITEM should appear. Note, the SN for SITEITEM will be the 13-character Site ID</p>

14.	If the SITEITEM Serial No. does not automatically appear -	Use the SITE ID as the Serial No.		Note, just copy the SITE ID from the Customer section and paste it into this field.
15.	Goto the "CONTRACT" Section, "Request Type"	Type the word "Service"		You may also click the Elipse and select the word Service. Note, Only use other codes in this location after conferring with your Program Manager
16.	Go to the "Problem" section, "Problem Code"	Type the word "OPEN"		You may also click the Elipse and select the word OPEN. Note, Only use other codes in this location after conferring with your Program Manager
17.	In the "Problem" box - Please note info in Comments	Enter the 1. Customer contact name and phone number 2. Serial number or tag number 3. Problem Description and/or special instructions		Note: Customer name must be entered on the first Line and Phone number on the second in the following format. Contact=First Last Phone=555-555-5555 You must also include the Complete Company Name and address, including ZIP Code if no site is listed, or opening T&M or project type calls.
18.	At top of screen -	Click " <u>Save and Continue</u> "	Now you can enter a Customer Reference Number and PO# if required	
19.	At Middle Right section of	Enter Customer		

	screen under Importance in "Reference" block	Reference Number		
20.	If you have a PO# for this service request - On the Left, click on: Address & Misc."	Enter PO# under the "Billing Info" located at the middle right.		
21.	Click on " <u>Save</u> " at top of screen Then click on <u>Home</u>		Takes you to the initial screen	
22.		Press " <u>Search</u> "	Shows all open service requests, including the most recently opened request.	
23.	Be sure to Click " <u>Log Out</u> " to exit			

3. View Service Requests

Step	Action	Input Data	Result	Comments
1.	Open Web Browser and go to URL XXXX	(URL)		
2.	Respond to the message in comments-	Click on <u>X</u> , <u>Allow</u> , or <u>Don't allow</u> .	Taken to Login screen	"Do you want to allow this web page to access your clipboard?"
3.	Enter User ID and Password Click on " <u>Sign In</u> "		Takes you to "Astea Home", "My Engagements"	From here you can see all your open service requests.
4.	Note the Service requests are listed. Service request numbers are formatted as follows: SVyymmddnnnn			Order type is SV, Service yy= last two digits of year mm=two digits for month dd=two digits for day of month nnnn=sequential numbering scheme
5.	Click on a <u>service request number</u>		Basic information about the Service Request can be seen in this screen	
6.	To view History calls	Click on " <u>Service Request History</u> "	Takes you to Service Request History Screen.	
7.	Click on " <u>More</u> "	Click on buttons In "From Open Date" and "To Open Date" and select date range to view.		
8.	Select Service order to view			Click on "Home" to return to initial screen
9.	To view Service Requests by Customer Reference number	From the "My Engagements Screen" click on " <u>More</u> " in the row next to the "Export,	Drop-down box appears	

		Calendar, Personalize” icons.		
10.	Click on “ <u>Service Request</u> ”	Enter Reference # on the left and press “ <u>Search</u> ” on the right.		
11.	Select Service order to view			Click on “Home” to return to initial screen
12.	Always be sure to Click on “ <u>Log Out</u> ” to exit session.			