Welcome to the Enterprise Technology Service Center (ETSC), your single point of contact for online Connect technical services and support. This single point of contact will ensure that Connect technical services are managed seamlessly for you in a timely and appropriate manner.

**EXCEPTION:** If your local IT department has advised you to use an alternate process for Connect support, this change will *not* affect you. You will continue to follow those procedures.

ETSC provides support for the following Connect Email and Calendaring Services:

- **Connect Calendaring**
  - Open New Connect Calendar Accounts
  - Close Connect Calendar Accounts
  - Unable to Access Connect Calendars
  - Connect Calendar Malfunctions or Errors
  - Other Connect Calendaring Services

- **Connect Email**
  - Email Account Creation
  - Email Account Deletion
  - Can’t Sent or Receive Emails
  - Email Harassment
  - Spam/Junk Email
  - Phishing/Scam Email
  - Problems with the Address Book
  - Email Malfunctions or Errors
  - Other Email Services

- **Connect Mailing List**
  - List Creation
  - List Deletion
  - List Management
  - Other Mailing List Services

- **Connect MTA Service**
  - Connect MTA Malfunction or Error
  - Register a New Connect MTA Device
  - Other Connect MTA Services

- **Other Connect Email and Calendaring Services**
This Guide is intended to provide information about ETSC Connect services, operating procedures, and the Self Service Portal. A copy of this Guide is available at Connect Support Request Guide.
SECTION ONE – CHANNELS FOR SUBMITTING CONNECT SERVICE REQUESTS

Channels for all Connect Users

For your convenience, there are three channels for contacting Connect IT staff and the Enterprise Technology Service Center (ETSC) if you have a Connect request or issue.

Self Service Portal – Available 24 hours a day/7 days a week for:
- ETS Workstation Support Customers
- Connect Department Administrators
- Campus IT Service Providers

To access the Self Service Portal:
1. Access the UCSB Connect website at [www.connect.ucsb.edu](http://www.connect.ucsb.edu)
2. On the Connect homepage, click on Connect Support.

Call Center – Available 8 a.m. – 5 p.m. on Monday – Friday for:
- ETS Workstation Support Customers
- Connect Department Administrators
- Campus IT Service Providers

Call Center Phone Number - 805-893-5000

Service Desk Chat – Available 8 a.m. – 5 p.m. on Monday – Friday for:
- ETS Workstation Support Customers
- Connect Department Administrators

Service Desk Chat launches from the Self Service Portal Homepage

NOTE – If your local IT department has advised you to use an alternate process for Connect support, this change will not affect you. You will continue to follow those procedures.

Recommended Channels for Connect Department Administrators

Connect Department Administrators are advised to use the Self Service Portal for the most timely response to service requests. Optionally, Connect Department Administrators can go directly to Service Desk Chat to communicate with ETSC staff about a service request or question.
MTA Service for Devices

ETSC also supports services related to Message Transfer Agent (MTA). MTA is a service that can be used by devices and applications to send outgoing email. Typically you would use an MTA service for printers, scanners, or in-house software for which authenticated STMP isn’t an option or is otherwise inappropriate.

To protect the MTA service from abuse, customers must pre-register an MTA device’s IP address. Only registered devices may use the MTA service.

You can register your device by having your Connect Department Administrator submit a support request via the ETSC Self Service portal or Service Desk Chat.

Connect Department Administrators – To register an MTA device via the Self Service portal, please refer to Section Eight – How to Register a Message Transfer Agent Device.
When you contact ETSC using one of the three channels, you will receive seamless support from a dedicated team member and one service tracking number.

For any Connect related service offering that you select, ETSC provides a defined period of time to respond to and resolve your issue or request. This period of time is referred to as a Service Level Agreement (SLA) between ETSC and you.

Your response SLA and resolution SLA will be communicated to you for every issue or request that you report. Standard SLA’s vary by service offering and will be monitored to be sure you are getting assistance in a timely manner. Some service offerings are considered more critical than others due to the nature of the request.

Please be advised that some issues and requests may require the assistance of highly specialized technicians who are outside of the ETSC support team. In these instances, those who provide additional assistance will work outside of the Service Level Agreement response and resolution times.
Overview

The ETSC Self Service Portal is a website that you can use to create and edit Connect Calendaring and Email service requests, or to report incidents (i.e., something is broken or service is disrupted). You can use the portal to create a service ticket that will be routed to the appropriate ETSC team. The portal is part the ETSC service management system.

How to Log In

2. Click on Connect Support.
3. Enter your UCSBNetID and Password, and click the Log In button.
4. This will take you to the **ETS Service Catalog > Email and Calendaring** services section.
1. The top part of the Email and Calendaring page is the banner. It includes your Name and the Logout function.

2. Below the Banner is the Enterprise Technology Services logo.

   NOTE – If you click on the Enterprise Technology Services logo, you will be taken to the Self Service Portal Homepage. Currently, Connect Email and Calendaring customers will only see services that they are able to request.

   NOTE – To return to Email/Calendar services, click on the Email/Calendar > more services link. Or, you can select Connect Email, Connect Calendaring, Connect MTA Service, or Other Connect Email and Calendaring Services.
NOTE – Additionally, if you click on the ETS Service Catalog link in the Email and Calendaring services section, you will be taken to the Self Service Homepage and will need to navigate back to Email and Calendaring services.

3. Email and Calendaring includes five Related Categories for Connect services.
   - Connect Calendaring
   - Connect Email
   - Connect Mailing List
   - Connect MTA Service
   - Other Connect Email and Calendaring Services

   ![Email and Calendaring](image)

   **NOTE** – Please be aware that the Service Level Agreement will change depending on the service that is selected. Some service offerings are considered more critical than others due to the nature of the request.

   **NOTE** – As a best practice, you should only select Other Connect Calendaring Services or Other Email Services if the other service offerings clearly don’t match the service that you require. Other Connect Calendaring Services and Other Email Services have Service Level Agreements with lower priorities than other service offerings. Also, if you select one of these options, a Request form will always display (rather than an Incident form).

4. Each Related Category includes service offerings. For example, if you click on Connect Calendaring you will be taken to a list of items (service offerings) that are related to Connect Calendaring.
5. Each item (service) has a **More Information** selection. If you click on **More Information**, a summary of the related Item will display.

6. You can click on **More Information** again to remove the summary.

7. Click on the Item that most closely matches your service need. For example, click on the Open New Connect Calendar Account title to request that particular service.

8. Once you have selected a service offering, you will be taken to either a **Request** or **Incident** form to generate a Service Ticket.
Following are examples of service offerings that would generate a Request form:

- Email Account Creation
- Email Account Deletion
- Open New Connect Calendar Account
- Close Connect Calendar Account

Following are examples of service offerings that would generate an Incident form:

- Can’t Send or Receive Email
- Email Malfunction or Error
- Unable to Access Connect Calendar
- Connect Calendar Malfunction or Error

**NOTE** – Sections Six and Seven of this Guide provide information about creating service tickets for a Connect request or issue.
Purpose of Service Tickets

Service Tickets facilitate the efficient processing, documentation and tracking of Connect incidents (issues) and requests. Nothing should get in the way of you doing your work, but if something does, submitting a Service Ticket gives us the best opportunity to resolve the Incident or fulfill your Request.

Service Tickets facilitate solutions in the present while providing us with the information we need to serve you better in the future. There are two types of Service Tickets for Connect users:

- **Incidents** – An Incident means that a Connect service is either “broken” or performance is degraded. An example would be if you can’t send or receive Connect email. The ETSC support team relies on you to report Incidents, and the team commits to resolve them within a specified Service Level Agreement (SLA) time.

- **Requests** – A Request is any Connect service for which you need a change, addition, or modification. For example, if you need a new Connect Email account created or a deletion of an existing email account, the Self Service portal will guide you through the creation of a Request ticket. The ETSC support team commits to fulfill Requests within a specified Service Level Agreement (SLA) time.

When you select a **Connect Email** or **Connect Calendaring** service in the Self Service portal, the system will automatically generate a form (Service Ticket) for you to complete. The form that generates will depend on the service that you request (i.e. an Incident Ticket or a Request Ticket).

The following page shows examples of an Incident Ticket and a Request Ticket.
Example #1 – Incident Ticket – Can’t Send or Receive Connect Email

Example #2 – Request Ticket – Email Account Creation
This section includes instructions for creating a Service Request ticket for a Connect Request.

1. Use the How To Log In instructions in Section Three of this document to navigate to Email and Calendaring services.

2. Click on the Related Category that most closely matches your need. For example, click on Connect Email to request a service related to Email.

3. Click on the service Item that most closely matches your need, such as Email Account Deletion.

4. A form will open that is specific to the service request item that you selected.
5. Certain fields will automatically populate with your contact information. The fields that will populate are **Opened By**, **Requested for**, **Requested For Phone**, and **Requested For Email**.

![Image of a service request form with fields highlighted]

**NOTE** – Required fields have a red bar to the left of them. The bar will change to green once you enter information.

6. The **Requested for** field includes a More information link. If you click on the More information link, the following message will display.

![Image of More information message]

7. Click on the More information link again if you would like to hide the message.

8. Click in the **Requested for** field if you are opening the request on behalf of someone else. For example, you may be completing the request for someone else in your department.

![Image of a field with More information link]

9. Highlight the existing name and press the delete button on your keyboard. Alternately, you can highlight the name, and then type a new name over it. The field will be highlighted in pink until you select a new name.
10. You can also **search** for names. To do this, click on the **magnifier glass** to the right of the **Requested for** field.

![Search Example](image)

**NOTE** – When you begin to enter a new **Requested for** name, you will be provided with options of names that are in the system. For example, if you type “ann,” the system will populate choices of names and narrow them down as you continue to type.

11. Once the **magnifier glass** is clicked, a **pop-up window** will display all system users, beginning alphabetically by **First Name**.

![Pop-up Window Example](image)

**NOTE** – If you hover your mouse over the **Information** icon to the right of the **Requested for** name, you will see additional information for the person selected.

12. You can click on the **Column Headers** (such as **Name**, **First Name**, **Last Name**, and **Email**) to sort the information by reverse alphabetical order.

![Column Headers Example](image)
13. After you have clicked on the “magnifying glass” to open the pop-up list of names, you can refine your search using one of the following methods:

A. Click on the left or right arrows at the top of the pop-up box to select additional pages of names. If you click on the double left and double right arrows you will be taken to the beginning and the end of the list of names. Once you find the appropriate name, click on it to select it.

B1. Click the down arrow to the right of the Go to field. Select an option from the list, such as Last Name or First Name and type the appropriate name in the search field. Press Enter on your keyboard, or click on the “magnifying glass” to the right of the search field. Your search results will display.

B2. Click on the appropriate Name for the requestor.
B3. You will be returned to your ticket with the new name populated in the **Requested For** field. The requestor’s contact information will also display in the **Requested For Phone** and **Requested For Email** fields.

14. Enter as much information as you have in the required **Detailed Description** field. This will assist the ETSC service staff in responding to your request in a timely manner. For example, you can add additional contact and location information if appropriate.

**NOTE** – Required fields are highlighted with a red bar. Once you enter information into the required field, the bar will change to **green**.

15. To **increase** the space in the **Detailed Description** field, click on the **plus sign**. To **decrease** the space in the **Detailed Description** field, click on the **minus sign**.

16. Once you have entered all of the required and optional information on the **Request** form, click on the **Order Now** button.
**NOTE** – Do not increase the Quantity from 1 before you click the **Order Now** button. Each request for services should be submitted separately.

**NOTE** - Once you submit a Request Ticket, system generated emails with the **Order Number** and **Status** will be sent to:

- The “Opened By” person
- The “Requested for” person (if different than the “Opened By” person)
- Any individual who has been added to the Watch list for the Ticket. For information about the Watch list, please see the **How to Add Others to a Ticket Watch List** section on page 22 of this document.

In addition, the individuals listed above will be able to view the ticket in the “**My Open Tickets**” section of the Self Service Portal homepage. For additional information about the homepage, please refer to **Section Ten** of this document.

17. After you click the **Order Now** button, the system will provide you with a **Request Number**. You can also hover your mouse over the icons under the **Stage** section to get information about the progress of your ticket.

At this point, you have two options:

- Return to the **Request** form, then **Email and Calendaring**.
- Click on the **Request Item** number to view additional details, add additional comments and to add others to the Watch List (if appropriate). Please see **How to Add Others to a Ticket Watch List** in this section of the document for instructions on how to add others to the Watch List.

18. To return to the **Request** form, click on the **green** back arrow next to **Order Status**.
19. To return to Connect services, click on the Email and Calendaring link.

**How to Add Others to a Ticket Watch List**

You can add other individuals to the **Watch list** of a ticket. For example, you may want someone else in your department to be aware that a ticket was created. Once added, they will receive system generated emails when comments are added to the ticket and the ticket will display on their “My Open Tickets” section of the Self Service Portal Homepage. However, people added to the **Watch list** will not be able to add **Additional Comments** to the ticket.

1. Once you have created a ticket, click on the **Request Item** number in the **Order Status** summary.

   ![Order Status](image)

   **NOTE** – This will display additional details about your ticket such as the associated Service Level Agreements and Activity related to your request. Please see **Section Ten** of this document for instructions on viewing additional details and adding additional comments to a ticket.

2. To add other individuals to the **Watch list**, click on the lock icon next to the **Watch list** to open it.
3. A **Watch list** pop-up will display. The following **Watch list** icons are available, in addition to the **Watch list** name entry field:

   a. Add “me” to the Watch list. **NOTE** – This is normally only used by ETSC technicians. If you are the “Opened By” or “Requested for” person on the ticket, you do not need to add yourself to the watch list. You will already receive email notifications.

   b. Remove someone from the Watch list if you added them in error.

   c. View additional information about someone on the Watch list.

   d. Add/remove multiple people from the Watch list. This icon will open a pop-up window where you can select and add/remove multiple people at one time.

   e. Close (“lock”) the Watch list. You can use this to close the Watch list once you have finished making entries.

4. To **add** someone to the Watch list enter a **partial** or **full name** in the **Watch list** name entry field.

   ![Watch list icon](image)

   **NOTE** – If you enter a partial name, the system will suggest names for you to select.

5. You can also search for a name using the **Lookup using list** icon. This will produce a pop-box for you to search by Last name, First name, and email.
NOTE – If you are adding a UCSB person to the Watch list, always use the name entry field or the Lookup Using List icon. Entering non-UCSB email addresses in the Enter email address field will allow an individual to receive Watch List notification emails, but they will not be able to access the system to view the ticket.

NOTE – Please refer to Pages 18 – 19 of this section for instructions on how to search for names.

6. Once you have selected a name for the Watch list it will display in the Watch list field. You can add multiple people to the watch list.

   ![Watch list](image)

   NOTE – Individuals added to the Watch list will receive system generated emails when comments are added to the ticket. They will also see the ticket in their “My Open Tickets” on the Self Service Portal Homepage. However, individuals on the Watch list will not be able to add comments themselves to the ticket.

7. To close the Watch list window, click on the “Lock” icon. The names on the Watch list will now display in summary format.

   ![Requested Item - RITM0001866](image)

   8. Click on the Update button to save your changes.
NOTE – For additional information on Editing your ticket, please refer to Section Ten – Viewing and Editing My Open Tickets.
This section includes instructions for creating a Service Request ticket for a Connect Incident.

1. Use the How To Log In instructions in Section Three of this document to navigate to Email and Calendaring services.

2. If you select a service that is related to an issue, an Incident form will display for you to complete. For example, if you select Connect Calendaring from Related Categories and then Unable to Access Connect Calendar from the list of service Items, an Incident form will display.

3. The following fields will automatically populate with your information:
   - Opened By
   - Requested For
   - Requested For Department
1. **Requested For Phone**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested For Phone</td>
<td>805.653.8811</td>
</tr>
</tbody>
</table>

2. **Requested For Email**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested For Email</td>
<td><a href="mailto:asin.dandon@ucsb.edu">asin.dandon@ucsb.edu</a></td>
</tr>
</tbody>
</table>

**NOTE** – You may also search for and select your Location. However, the Self Service portal is not populated with all campus locations at this time.

**NOTE** – Required fields have a red bar to the left of them. The bar will change to green once you enter information.

4. If you are creating the Incident form on behalf of someone else, you can type another name in the **Requested For** field. This will populate the **Requested For Phone** and **Requested For Email** fields with the other person’s information.

**NOTE** – For information on how to search for another name, please refer to Section Six, Pages 18 – 19 of this document. The search functionality for the **Requested For** name on an Incident form is the same as on a Request form.
5. Sometimes your service needs might require a more immediate response and resolution. In these instances, you will need to let the ETSC service team know about the higher level of importance related to the incident. You can do this by changing the **Urgency** and **Impact** on the Incident form.

   **NOTE** – The Incident form will always default to a **1 – Low** urgency selection.

   **a.** Click on the down-arrow to the right of the *Set the urgency of this issue* field. Select the urgency that you think is appropriate for the Incident.

   ![Urgency Selection](image1)

   **b.** Click on the down-arrow to the right of the *Whom does this issue impact?* field. Select the **level of impact** for this incident. Your options are **Self only**, **Local group** or **Whole department/unit**.

   ![Impact Selection](image2)

   **NOTE** – If you select a combination of an **Urgency** and **Impact** that the system determines to be of higher priority, you will receive the following message when you try to **Submit** the ticket:

   ![Message from webpage](image3)

   These are situations when the ETSC service staff would like immediate notification of the issue so they can respond in the most rapid manner possible. The combinations that will prompt this message are:

   - Urgency High – Impact Self
   - Urgency Medium or High – Impact Local group
   - Urgency Medium or High – Impact Whole department/unit

6. Enter as much information as you have about the issue in the **Notes/Comments** field. This will assist the ETSC service staff in responding to your request in a timely manner. You can also add additional contact and location information if appropriate.
7. Some services may require additional information. For example, if your issue is **Can’t Sent or Receive Email**, you will be required to select the **Email Client** that you use (Google Web App) and the **Browser** that you use (e.g. Firefox, Chrome, etc.).

8. When you are done filling out the Incident Ticket form, click on the **Submit** button.

9. After you click on **Submit**, the system will save the information and provide you with an **Incident Number**. The associated **Service Level Agreements** and **Activity** related to your Incident Ticket will also display. The **Contact field** will display the name of the **Requested For** person.

**NOTE** - Once you submit an Incident Ticket, system generated emails with the **Incident Number** and **Status** will be sent to:

- The “Opened By” person
- The “Requested For” person (if different from the “Opened By” person)
- Any individual who has been added to the Watch list for the Ticket. For information about the Watch list, please see **How to Add Others to a Ticket Watch List** in this section of the document.
In addition, the individuals listed above will receive system generated emails when comments are added to the ticket, and will be able to view the ticket in the “My Open Tickets” section of the Self Service Portal Homepage. For additional information about the Homepage, please refer to Section Ten of this document.

How to Add Others to a Ticket Watch List

1. You can add other individuals to the Watch list on an Incident Ticket. For example, you may want someone else in your department to be aware that a ticket was created. Once added, they will receive system generated emails when comments are added to the ticket, and the ticket will display on their “My Open Tickets” section of the Self Service Portal Homepage.

2. To add other individuals to the Watch list, click on the lock icon next to Watch list to open it.

3. A Watch list pop-up will display. The following Watch list icons are available, in addition to the Watch list name entry field:

   a. Add “me” to the Watch list. **NOTE** – This is normally only used by ETSC technicians. If you are the “Opened By” or “Requested For” person on the ticket, you do not need to add yourself to the watch list. You will already receive email notifications.

   b. Remove someone from the Watch list if you added them in error.

   c. View additional information about someone on the Watch list.

   d. Add/remove multiple people from the Watch list. This icon will open a new pop-up window where you can select and add/remove multiple people at one time.
e. Close (“lock”) the Watch list. You can use this to close the Watch list once you have finished making entries.

4. To add someone to the watch list, enter a **partial** or **full name** in the Watch list name entry field.

   ![Watch list](image)

   **NOTE** – If you enter a partial name, the system will suggest names for you to select.

   **NOTE** – If you are adding a UCSB person to the Watch list, always use the name entry field or the **Lookup Using List** icon. Entering non-UCSB email addresses in the **Enter email address** field will allow an individual to receive Watch List notification emails, but they will not be able to access the system to view the ticket.

5. You can also search for a name using the **Lookup using list** icon. This will produce a pop-box for you to search by Last name, First name, and email.

   **NOTE** – For additional information on how to search for names, please refer to Section Six, Pages 18-19 of this document.

6. Once you have selected a name for the **Watch list**, it will display in the Watch list field. You can add multiple people to the Watch list.

   ![Watch list](image)
NOTE – Individuals added to the **Watch list** will receive system generated emails when comments are added to the ticket. They will also see the ticket in their “**My Open Tickets**” on the Self Service Portal Homepage. However, individuals on the Watch list will **not** be able to add comments themselves to the ticket.

7. To close the **Watch list** window, click on the “Lock” icon. The names on the **Watch list** will now display in summary format.

8. **Click on the Save button to save your changes.**

9. **To return to Connect services, click on the Enterprise Technology Services logo at the top of the Incident form.**

10. **This will take you to the Self Service Portal Homepage.** Click on the more services link in the Email/Calendar section of the Service Catalog.
11. This will take you back to **Email and Calendaring** services.

   
   **NOTE** – For additional information on Editing your ticket, please refer to [Section Ten of this document – Viewing and Editing My Open Tickets](#).
ETSC supports services related to Message Transfer Agent (MTA) devices. MTA is a service that can be used by devices and applications to send outgoing email. Typically you would use an MTA service for printers, scanners, or in-house software for which authenticated SMTP isn’t an option or is otherwise inappropriate.

To protect the MTA service from abuse, customers must pre-register an MTA device’s IP address. Only registered devices may use the MTA service. You can use the Self Service Portal for the following MTA Services:

- Register a New Connect MTA Device
- Connect MTA Malfunctions or Error
- Other Connect MTA Services

This section provides instructions on how to Register a New Connect MTA Device.

1. Use the How To Log In instructions in Section Three of this document to navigate to Email and Calendaring services.

2. Select Connect MTA Service from the Related Categories.
3. Select **Register a New Connect MTA Device** from the list of service items (offerings).

4. A **Request** form will display for you to complete.

5. Enter information on the form using the instructions in **Section Six** of this document.

6. Enter the IP Address for the MTA Device in the **Device IP Address** field.

7. Once you have entered all of the required and optional information on the **Request** form, click on the **Order Now** button.
8. After your request has been fulfilled and your MTA device has been registered, it is important to use the following parameters to configure your system:
   b. SMTP server address: mta.connect.ucsb.edu
   c. Port: 25
   d. SSL/TLS: No

9. You will need to ensure the message is being sent from a valid From address. This means that the address from which messages are sent must be a valid address that you yourself can send a message to.

10. If you don’t already have a suitable address, you can request either a Delivery Alias or Functional Account using the ETSC Self Service Portal > Email and Calendaring > Connect Email > Email Account Creation. Or, you can use the Service Desk Chat to request this.

11. Once you have an address, you’ll need to configure the device to send from that address.
1. You can attach any pertinent documents (files) to your Request or Incident ticket by clicking the Paper Clip icon in the upper right corner of the form.

2. Once you click the Paperclip icon, an Attachments pop-up window will display.

3. Click on Browse to search for and select the document on your computer to attach.

4. A File Upload pop-up box will display.

5. Locate the file to attach and click the Open button.
6. The document title will now appear in the Attachments pop-up box.

7. Click the Attach button.

8. The document will now be attached to your ticket.

**NOTE** – Each time you attach a document, both you and the appropriate ETSC service team member will receive an email notification.

**NOTE** – You can attach multiple documents to your ticket. Documents can be attached while you are completing the initial form for the ticket and also after you have submitted the ticket.
The Self Service Homepage is a useful tool for reviewing and editing your open Connect service tickets. You can also view important system Alerts on the Homepage.

**How to Access the Self Service Homepage**

**NOTE** – For information on logging into the Self Service portal, please refer to Section Three of this document.

1. From **Email and Calendaring** Services, click on the **Enterprise Technology Services** logo.

![Self Service Homepage](image)

2. This will take you directly to the Self Service Homepage.

**NOTE** – Currently, Connect Email and Calendaring customers will only see services that they are able to request.

3. The top of the Homepage includes a banner with **your name** and the **Logout** function.
How to Use Service Desk Chat

1. The right side of the page includes links to the User Guide and Service Desk Chat. It also displays the Call Center Phone number.

   ![Links to User Guide, Service Desk Chat, Call Center](Image)

   NOTE – The link to the Wholesale Catalogs is only available to select customers.

2. You can click on the Service Desk Chat link to chat online with an ETSC service representative.

   ![Service Desk Chat Link](Image)

3. Once you click on the link, you will be prompted to select a Chat subject, such as Email.
4. Once you select a **Chat subject**, you will be connected to an ETSC service representative and you can request a service or ask a question by typing in the **Chat box**.

**How to View and Edit “My Open Tickets”**

This section of the Homepage displays any services you have requested that are still in progress, such as a request for a New Connect Email Account or an issue with Connect Calendaring. Open Request and Incident tickets will display for the following people:

- The “**Opened by**” person
- The “**Requested for**” person (if different than the Opened by person)
- Any individual who is on the **Watch List** for the ticket

You can click on the links of each open ticket to view additional information.

1. On the left side of the page (under Alerts) you will see a box titled **My Open Tickets**.

2. If you have open tickets (i.e. Incidents or Requests that are not yet resolved), they will each have an assigned number. Open Request tickets will be listed first, with Incident tickets below.

   - Requests will be listed as RITM followed by a number and then a short description.
   - Incidents will be listed as INC followed by a number and then a short description.

3. If you hover your mouse over a **ticket number**, the system will display who the ticket was **Requested for**. For example, you may have created a ticket on behalf of someone else in your department.
4. To view additional details about an open ticket, click anywhere on the ticket number/short description. This will take you directly to the ticket.

5. You can view the ticket and, if appropriate, add **Additional comments** on the ticket for the ETSC service team.

**NOTE** – Additional comments can be added to the ticket by the “Open by” person and the “Requested for” person. Individuals on the **Watch list** can view the ticket but **cannot** add additional comments.

6. You can also view additional information on the ticket such as the corresponding **Service Level Agreements (SLA)** and **State (Status)** of the Incident.
NOTE – People can also be added to the Watch list by the “Opened By” or “Requested For” person. Individuals who are on the Watch list cannot add others to the Watch list. For instructions on how to add individuals to the Watch list, please see Section Six – How to Add Others to a Ticket Watch List.

7. To return to the Self Service Homepage, click on the Enterprise Technology Services logo at the top of the ticket.

How to View Alerts

The Self Service Homepage contains system-related Alerts. These alerts contain important information from ETSC about system maintenance, system availability, and major events affecting departments and the campus.

1. To view additional information about an Alert, click on it once.

2. Full details about the Alert will display.
3. To return to the Self Service **Homepage** at any time, click on the **Enterprise Technology Services** logo.

**Purpose of the Service Catalog**

The **Service Catalog** is an organized collection of technology-related services that ETSC offers to campus customers. It also acts as a knowledge management tool for our technicians, allowing them to efficiently route Incidents and Requests to the appropriate ETSC team member.

**Viewing the Service Catalog for Connect Services**

Currently, Connect Email and Calendaring customers will only see services that they are able to request.

1. To select an **Email** or **Calendar** service, click on a service, such as **Connect Email**, to view a list of the service offerings (items) in that service category. Alternately, hover your mouse over a service, such as **Connect Calendaring**, to view a list of service offerings (items) related to the service.

2. When you hover over a specific service, such as **Connect Calendaring**, you will see the top five most frequently requested service offerings (items). To view all service offerings, click on the **View all** link.
3. Within each service area of the catalog (such as **Email/Calendar**), there is a link at the bottom for **more services**. If a service area includes more than four related service categories, the remaining services will be listed under **more services**. Currently, **Email/Calendar** has five related services categories. If you click on the **more services** link, those services categories will display.

4. Once you select a service category, such as **Connect Email**, you will be taken to a list of service items specific to that category, such as **Email Account Creation** and **Email Account Deletion**. You can select one of these service items to create a Request or Incident ticket.

   **NOTE** - For instructions on creating a **Service Ticket** for a Connect request or issue, please refer to Sections Six and Seven of this document.

5. To return to the **Self Service Homepage** at any time, click on the **Enterprise Technology Services** logo at the top of the page.
The **Self Service Homepage** includes a **Search** field. This field can be used to query the portal for various service topics.

1. Type a keyword or words in the **Search** field and click on the magnifying glass. Alternately, you can press the **Enter** key on your keyboard.

2. The search will return all results that match your keyword(s). These results will typically include service offerings and any tickets that you have already created that are related to the search keyword(s). The search will also display any corresponding knowledge articles and catalog items.
3. To return to the Self Service **Homepage** at any time, click on the **Enterprise Technology Services** logo.
SECTION TWELVE – GUIDELINES FOR ESCALATION OF SERVICES

Escalating an Incident ticket

After submitting an Incident ticket, you can change the Impact of the incident but not the Urgency.

For example, you may have submitted an Incident ticket believing that this is impacting only yourself. Later you may find out that it is impacting your whole department.

1. If you determine that more people are being affected, click on your ticket in the My Open Tickets section of the Self Service Homepage.

2. Click on the down-arrow to the right of the Impact field and select a new impact for the Incident.

3. Add comments about the new impact in the Additional comments field.

4. Click on one of the Save buttons that are located at the top-right and the bottom-left of the ticket.
NOTE – This will change the priority of the ticket and may trigger a new Service Level Agreement (SLA). If the SLA has changed, a system generated email notification will be sent to the ETSC Technician, the Opened By person, and (if applicable) the Requested For and Watch list individuals.

NOTE – Alternately you can call the Call Center or launch a Service Desk Chat to discuss the situation with a service technician, who can make changes to the Incident ticket for you.

**Additional Guidelines**

Occasionally you may wish to request that your reported incident or request be processed faster than the assigned SLA response and resolution times. Please be aware that ETSC must consider the financial impact, customer impact, and whether a work-around is available prior to escalating a request or incident. The following escalation mechanisms are available:

1. For pervasive and consistent service issues or adjustments to an existing service, please contact ETSC Service Management (Manny Cintron, mcintron@ucsb.edu).

2. For service level escalations with financial or customer impact and no workaround, please contact ETSC via the Call Center at **805-893-5000**.

3. For breached SLA’s, please contact ETSC via the Call Center at **805-893-5000**.
SECTION THIRTEEN – CUSTOMER SURVEY PROGRAM

Your feedback is critical to ETSC’s ability to improve services.

Once your ticket has been resolved and closed, you will receive an email requesting that you fill out a brief survey regarding your experiences with ETSC. The survey will include questions related to the service team member(s), response time, contact channels and overall service.

1. To complete the survey, login to the Self Service portal with your UCSBNetID and Password to complete the short survey.

2. When finished marking your responses, click on the Submit button.

NOTE – For instructions on logging into the Self Service portal, please refer to Section Three of this document.
SECTION FOURTEEN – GLOSSARY

**Alerts** – Important information from ETSC about system maintenance, system availability, and major events affecting departments and the campus.

**Call Center** – A direct phone line to a technology support technician. You can use this communication channel to report an unplanned interruption of a Connect service, a reduction in the quality of a Connect service or a request for a Connect service. **805-893-5000**

**Escalating a Ticket** – An action to request a more immediate response and resolution to a submitted Incident or Request.

**ETSC** – Enterprise Technology Service Center <etsc.ucsb.edu>. ETSC is your single point of contact for online Connect technical services and support.

**Impact** – The way to identify who is experiencing an incident (yourself only, a group, or a whole department). This field is available when submitting an Incident ticket. We recommend using the Call Center or Service Desk Chat if the incident is impacting more than you only.

**Incident** – An **Incident** means that a Connect service is either “broken” or performance is degraded. An example would be if you can’t send or receive Connect email. Incidents are listed by “INC…” in the My Open Tickets section of the Self Service Homepage.

**My Open Tickets** – A section of the Self Service Homepage which displays any services you have requested that are still in progress. Request tickets will be shown before Incident tickets.

**Request** – A **Request** is any Connect service for which you need a change, deletion, or addition. For example, if you need a new Connect Email account created or a deletion of an existing email account, the Self Service portal will guide you through the creation of a Request ticket. Requests are listed by “RITM…” in the My Open Tickets section of the Self Service Homepage.

**Self Service Portal** – This is the website used to request Connect services and to report Connect incidents (issues). This portal feeds directly to the appropriate ETSC technician.

**Service Catalog** – A grouping of products and services by general categories, which include Service Level Agreements.

**Service Desk Chat** – Accessible on the Self Service Homepage, launching a Service Desk Chat connects you directly with a technology support technician who will assist you in reporting an incident or to answer your questions.
Service Level Agreement (SLA) – A defined period of time for ETSC to respond to and resolve your incident or request. The response SLA and resolution SLA will be communicated to you for every incident or request submitted. Standard SLAs vary by service offering and will be monitored to be sure you are getting assistance in a timely manner.

Service Offering – Any technology-related service that ETSC offers to you via the Service Catalog. Each Service Offering has a specific form to submit a ticket.

Service Ticket – One service tracking number you will receive after submitting either an Incident or Request, or after a service technician creates one for you. See Incident and Request above.

UCSBNetID – The UCSBnetID is the user id used to sign-in to services and applications available to the UCSB community. Visit the UCSBnetID Service Catalog [http://www.identity.ucsb.edu/customers/service_catalog/](http://www.identity.ucsb.edu/customers/service_catalog/) for details on the various applications that require a UCSBnetID for access. UCSB Identity records, on which the UCSBnetID is based, are automatically created for all UCSB Students, Faculty, and Staff. Campus affiliates and visitors may also have Identity records created to provide access to UCSBnetID-based services.

Urgency – An evaluation of the importance of an incident. We recommend using the Call Center or Service Desk Chat for incidents that have a pressing need for speedy resolution.

Watch list – A list of individuals who are added to a ticket. The Opened By and Requested For individuals on the ticket can add others to the Watch list. Individuals on the Watch list will receive email notifications when comments are added to the ticket and will be able to view the ticket. They will also see the ticket in the My Open Tickets section of the Self Service Portal Homepage.