# Merlin Self Service Reference Guide

## Magic Service Desk

Version 1.2

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# INTRODUCTION

Merlin Self Service Help Desk (SSHD) is a feature of Magic Service Desk. Merlin SSHD is available to all USDA employees and the Agencies and Contractors that are part of the Common Computing Environment (CCE) to assist in creating and resolving their own incidents. Merlin SSHD allows end-users to create a new incident (ticket), update their contact information, search the knowledge base (this feature is to be added at a later date), and check the status of existing tickets. Merlin SSHD can also display messages or outage notifications using the White Board Ticker. [White Board explained in Section XX.]

Each section of this guide illustrates and explains the various screens and options you will encounter as you use Merlin SSHD. In most instances you will soon find that the system is very easy to use for reporting and tracking problems to the State IT Staff, Local IT Support and the USDA/OCIO Service Desks. Planned enhancements include method for researching resolutions for the most common type problems encountered.

Screens illustrated in the sections have been numbered, and these screen numbers are referenced in the instructions. Some screens provide the user with several options from which to select. These options are explained and further reference may be made to a screen number for that option or description.

> THE CURRENT VERSION OF MAGIC SOLUTIONS SOFTWARE IS 7.5. VERSION 8.0 HAS BEEN RELEASE BY THE SOFTWARE VENDOR. WHEN THE MERLIN SELF SERVICE HELP DESK IS UPGRADED, EVERY ATTEMPT WILL BE MADE TO KEEP THE GENERAL FLOW CONSISTANT, THOUGHT MANY OF THE SCREENS WILL APPEAR DIFFERENT.

A condensed version of this guide is available as Chapter 17 of the *Windows XP User Reference Guide*. This is located on the Team Services Website.

### Browser Setup

The following settings should be used with Microsoft Internet Explorer 5.5 SP2 or higher versions:

> **Proportional font:** Times New Roman
> **Fixed-width font**: Courier New
> **Font size:** Medium
> **Character set:** Western

These settings represent the defaults. Using other settings may cause screen-positioning problems when running Merlin SSHD. The Standard CCE image meets this requirement, but some Vendors and specialty Groups may have to update.

**The above settings are not required**, but if experiencing problems this is a good place to start checking.

**Note**: “Polling” and other aspects of Merlin require refreshes and “pop-up” windows; Google toolbar, Yahoo toolbar and other “pop-up” blockers will interfere with this. If you have trouble with Merlin SSHD, make sure you do not have any such *unauthorized* software installed.

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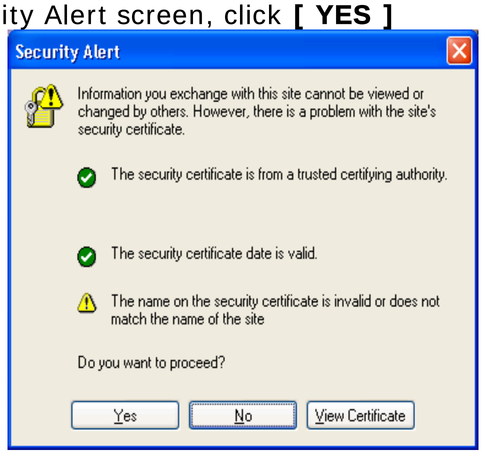
# GETTING STARTED

1. Create a Favorites link and Desktop icon in your browser.
2. Obtain your "Login ID and Password" for Self-Service
   a. User initiates Self Service "Password" request. **[Preferred Method]**
   b. User contacts a Service Desk to obtain your "Login ID and Password"
3. Change your password immediately after logging in for the FIRST TIME.

## 1. CREATE FAVORITES LINK and A MAGIC DESKTOP ICON

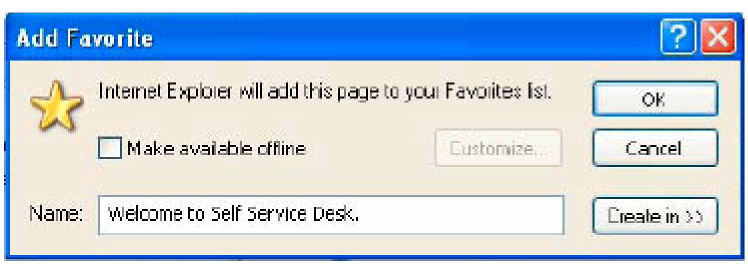
The following steps will show you how to add the link to your Internet Explorer favorite places and create a desktop icon.

a. Create Favorites Link
   1) Open Internet Explorer
   2) Enter the following URL in the Address Bar:
      **https://merlin.sc.egov.usda.gov/magicsshd**
   3) If you receive a Security Alert screen, click **[ YES ]**




Screen 1 – Security Alert

   4) Click the [ Add ] button on your Favorite Places to add the link (Screen 2).
      (If your Internet Favorites List isn't open, click on **[ Favorites ]** on the title bar)




Screen 2 – Add Favorite Window

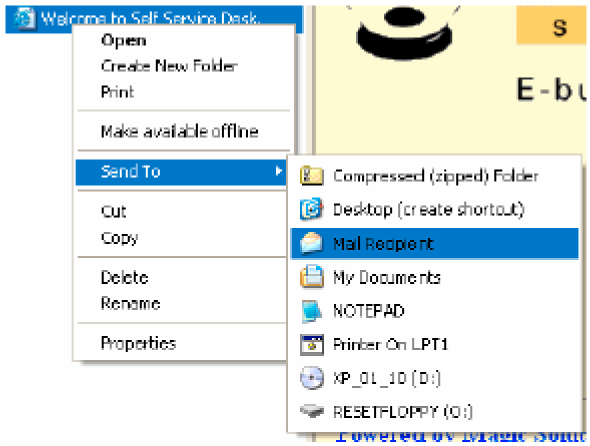
      (a) The URL at first point can Add to Favorites reads like:
         **https://merlin.sc.egov.usda.gov/magicsshd/sslogin.asp?**

         This ***MUST BE*** edited in order for the link to work properly.
         Refer to next page for edit procedure.

5) To EDIT the bookmark in the Favorites list:
   (a) After Adding the bookmark in your Favorites.
   (b) Go to the bookmark you just saved and **[ Right-Click** ] and **[ Select Properties ]**
   (c) Under the Web Document Tab, edit the URL to read **https://merlin.sc.egov.usda.gov/magicsshd**/
   (d) Click on **[ OK ],** to Save the change.

b. Create A Magic Desktop Icon

1) Within your Favorites, right click the **[ Welcome to Self Service Desk ]** newly created link in your Internet Favorites; select **[ Send To ]**, then **[ Desktop (create shortcut) ]**.




Screen 3 – Add Desktop Icon

## 1. REQUESTING A MAGIC LOGIN / PASSWORD OR RESET PASSWORD

The following provide steps on how to request a Magic Login and Password. These steps can also be used if you already have a Magic Login but have forgotten your password.

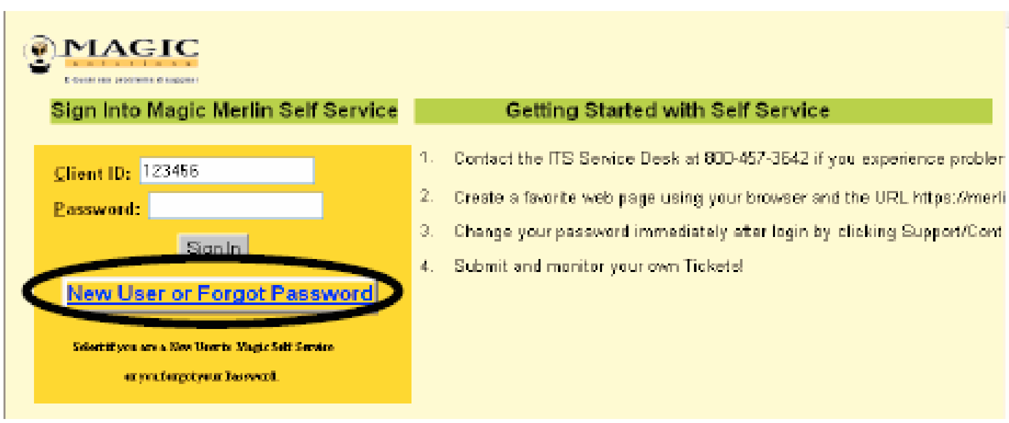
a. **You initiate** **[PREFFERED METHOD]**

1) If not at the Magic Web Site, double click the **[MAGIC (Welcome to Self Service Desk)]** shortcut icon on your desktop.
2) Click the language you wish to use.
   Currently there is no Spanish version of the Guide.


Screen 4 - Magic Language Window

3) On the **SIGN INTO MAGIC MERLIN SELF SERVICE** screen (Screen 5), enter the numeric portion of your e-Auth ID (iCAMS ID) in the client ID field, then click on **[ New User or Forgot Password ]**.

- *If your e-Auth ID is XY123456, you would enter 123456 in the client ID field.*
- *See Note: Client ID – Information Only at bottom of Appendix D for additional information about non-standard Client ID's.*
- *No password is needed to request a New User account*




Screen 5 – Magic Login Screen

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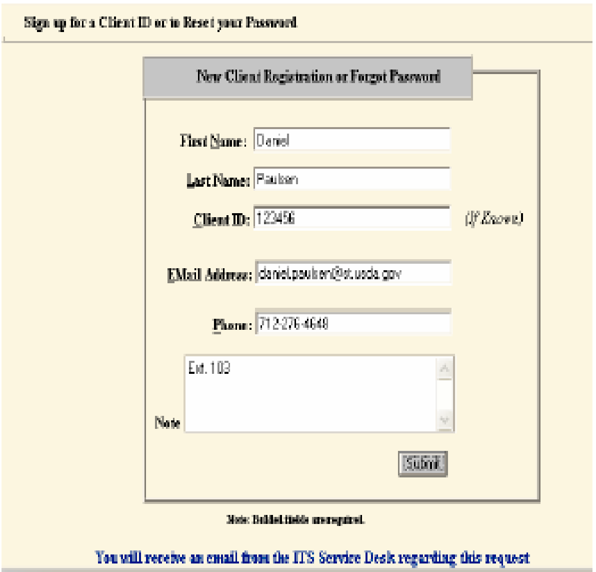
1) Complete the New Client Registration.
   Complete all fields as shown in Screen 6. This information must match the information stored in your e-Auth or ICAMS profile.




Screen 6 – New Client Registration

Provide the following information:

- First Name [Payroll Name]
- Last Name
- Client ID (Your iCAMS ID)
- Email Address
- Phone Number
  Add Phone Number Extension, if any in the Notes. Example: Ext 4

You will receive a system generated email with the Login and Password information. Appendix E is a sample of Email message.

If do not receive an email within 24 hours contact a Service Desk (Merlin Administrator) for assistance.

2) Click on **[ Submit ].**
3) You will get a message that you have successfully requested an account/password


Screen 7 – Thank you Screen

4) Click the **[ here ]** and Close the Login Screen.
5) The password will be emailed to you. Follow the instructions in the email to access Magic Self Service and change your password the first time logging on to Self Service

New USDA employee's that are requesting login and not yet in system, may be issued a temporary ID. See note at end Appendix D.

DO NOT ATTEMPT TO BE ISSUED MULTIPLE CLIENT IDs for MERLIN SELF-SERVICE.

Supervisors/Group Leaders See Appendix D for procedure to submit one (1) request for Self Service Accounts for multiple employees at same location. All employees at same Field Office, for example.

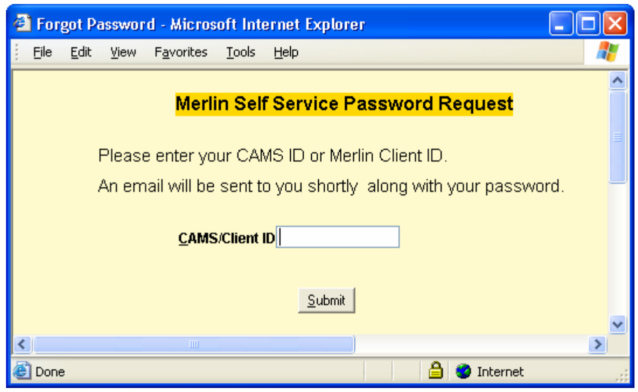
## 2. Forgotten Password.

a. If you would forget your Password, you have two options.

**Preferred and fastest method**

Option 1 – [You Reset Password]
1. Click on **[ Forgot your Password? ]** link.
2. Enter your Merlin **[ Client ID** ] or Merlin **[ Logon ID ]** and click on **[ Submit** ] button.

This generates email to you with a new password.



Screen 8 – Forgot Password

Option 2 [Contact Service Desk and ask that your password be reset.]
1. Another individual could open a ticket for you using their Self-Service account.
2. Call Service Desk at 800-457-3642
3. Email Service Desk at [ServiceDesk-STL@stl.usda.gov](mailto:ServiceDesk-STL@stl.usda.gov) or one of the other Service Desk email accounts.

How To Contact a Service Desk
New login requests and password resets for Self Service access may be directed to any of the respective Service Desks (Attn: Merlin Administrator) below, include all requested information for each of the individuals.

| | | |
|---|---|---|
| SD-STL | ServiceDesk-STL@stl.usda.gov | Ageast (RD) |
| SD-FTC | ServiceDesk-FTC@ftc.usda.gov | Agwest (NRCS) |
| SD-KC | ServiceDesk-KC@kcc.usda.gov | Agcentral (FSA) |

## Accessing Magic Self Service

### 1. Logging into Merlin SSHD

a. Click on the **[ MAGIC (Welcome to Self Service Desk ) ]** shortcut icon on your desktop, then choose your language by clicking on the link.
Or

b. Enter the URL https://merlin.sc.egov.usda.gov/magicsshd/ in Internet Explorer. Notice that there is an "S" in the URL.

This is a secure site and you may be warned with a Security Alert, which is normal. Click on **[ Yes ]** to continue, if this appears.


Screen 1 -Security Alert

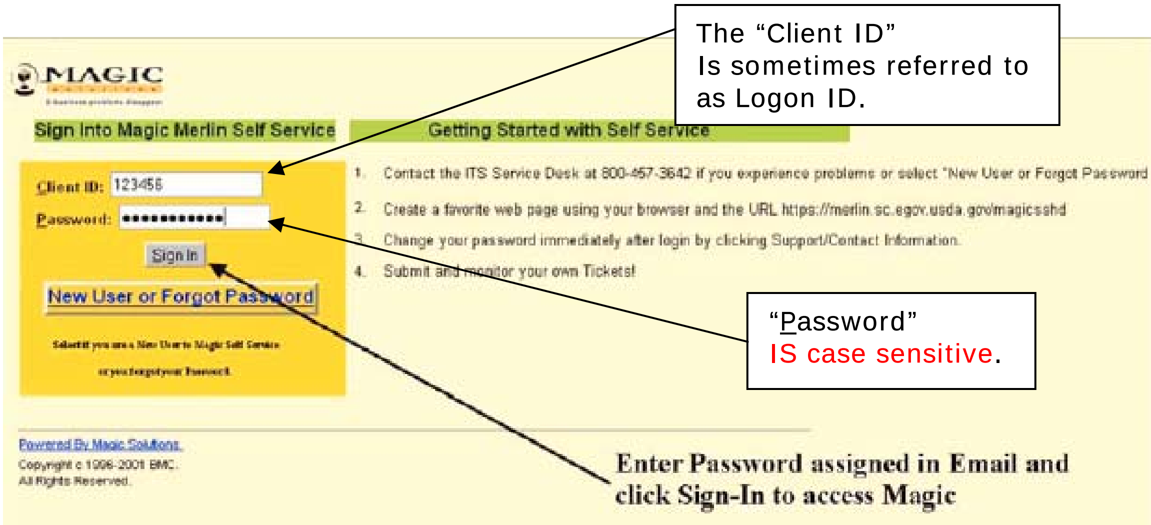
Currently Self-Service is available in two languages, English and Spanish.

c. Click on the desired language.

This guide is only available in English.


Screen 4 - Language Select

d. Enter the numeric portion of your E-AUTH ID and the temporary password assigned in your email, then click **[ Sign In ]** (Screen 8).



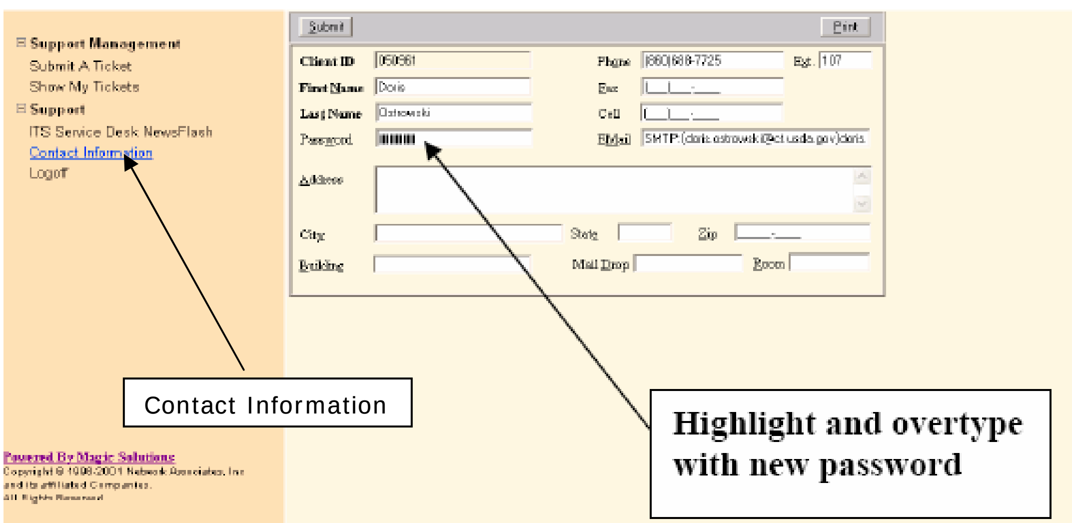

Screen 9 – Magic Login Screen

1) The normal Login ID will be your CAMS ID or First Initial and Last Name, like 001234 or Jane Doe = TMP.J.DOE. For additional information see Note at end of Appendix D.

e. Click on **+** sign next to **Support Management** or **Support** to view other options.
f. To Change or Reset Password
   1) In the **Support** section on the left side of the screen, click on **[ Contact Information ].**
   2) Replace the PASSWORD field with your new password. Refer to Screen 9).

## 2. CHANGING YOUR PASSWORD IN MAGIC SELF SERVICE

FIRST TIME LOGIN Only!! – Change your Password.




Screen 10 – Contact Information Screen

1. To change your password:
   a. Click on, **[ Contact Information ]** from Navigation Bar.
      May have to click on the + sign next to **Support** to display drop down menu (Refer to Screen 9 previous page)
   a. Highlight the current password (Bars) to **Erase** the old password
   a. **Ente**r the new password
   a. Click **[ Submit ]**
   a. At the **Confirm New Password** screen, **retype the password** in the **Confirm New Password** field, then click **[ OK ]**
   a. Click **[ Submit ]**, when returned to **Contact Information Screen** (Screen 9) to SAVE.


Screen 11 – Confirm New Password

WARNING!
Magic Self Service does **NOT** support the use of special characters in the password. Use letters and numbers only!.

b. It is suggested that you make the password as simple and easy for you to remember.

IMPORTANT NOTE Concerning Password Rules:

- **DO NOT use ANY special characters** in your password (& # @ = $ % *)
- Merlin passwords DO NOT expire.
- No rules as to how many characters must be in password.
  Recommend at least 6 character(s)/number(s) at minimum.
- No rules for number of Upper/Lower case or numbers.

Caution: Do not confuse the Merlin Logon ID with eAuth or other similar logon's, it is a separate ID.

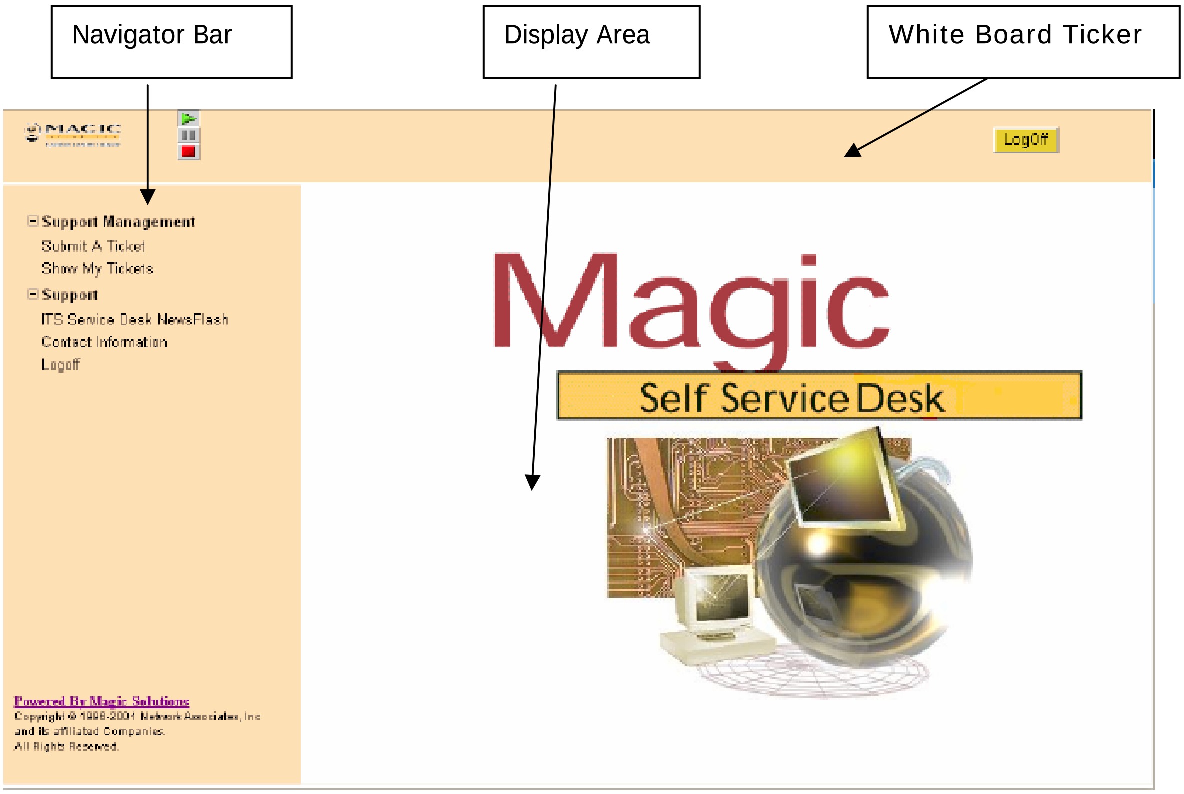
Once your password is changed, you should log off and back onto Magic using the new password.

- If unable to logon using your **NEW** password, attempt to logon using the old password.
- If still unable to logon, use the **Reset Password Option**.

## The Main Application Window (Screen 12)

The first screen you are greeted with is the Merlin Self Service Help Desk (SSHD) Screen.

The Main Application window is made up of three parts, the Navigation Bar (Menu) and Display areas for selected menu option are the two primary areas.




Screen 12 - Main Application

Self Service Views – Functionality

• **Navigation Bar:** Each link represents a function (Menu) a user has permission to open or use within Merlin Self-Service.

• **Display Area:** Area where the forms and lists will display, when selected from Navigation Bar.

• **White Board Ticker:** System messages display in this area.

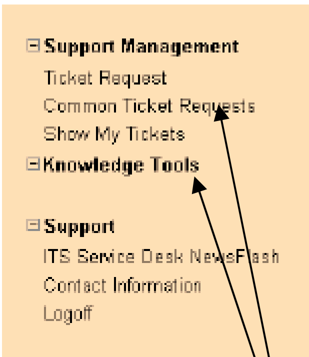
a. To pause the scrolling message at the top, use the Pause button (parallel gray rectangles).

a. To remove the scrolling message, click on the red square Stop button.

## Navigation Bar

The Navigator Bar is a menu that lists all the modules, or forms, that a user has permission to open or use within Merlin Self-Service.

On the left side of the main application window (Screen 12) is the “Navigator Bar”




Screen 12.1: Navigation Bar

Options Currently NOT ACTIVE.

The standard Navigator Bar for the Self-Service has the following Task Bars with their respective subordinate modules / forms:

- Support Management
  Submit A Ticket (New Ticket Request)
  Common Ticket Requests [NOT Currently Active]
  Show My Tickets

- Knowledge Tools [NOT Currently Active]
  Knowledge Search

- Support
  ITS Service Desk NewsFlash
  Contact Information
  Logoff

**IMPORTANT:** When logging off Merlin Self-Service application, use the ***Logoff*** link on the Navigator bar or ***Logoff*** button. This will ensure that your session is closed and will free up an application license.

If you do not logoff, **the system will time-out**. If any ticket are open when timed out, there would be the possibility that entries made would not be saved and the ticket would remain locked in open status by you, and no one could update the ticket.

**Submit A Ticket** (Ticket Request)
This option used to create and submit a new Ticket (Service) Request.

**Common Ticket Requests** – Create a new ticket based on a standard problem description.
The most common requests/problems with a resolution or troubleshooting steps and a recommended course of action to resolve.
At the current time this feature is inactive.

**Show My Tickets** – Display all tickets (Open, Closed or Both) in your name. If setup can also view all tickets at the site you are assigned.

**Knowledge Search** - Statistical Information Retrieval (SIR) feature. You can search the previous resolutions to resolve current problem based on previous solutions entered into the system.

## White Board Ticker

The White Board is a scrolling text message that continuously displays to notify users of a known problem that is affecting a specific application or region.

Tickets can be linked to a white board. These tickets will receive notification when a problem resolved. This is a useful method to inform everyone with a common problem that it has been resolved.

Examples of Common Types of White boards

a. Notifications of Merlin Maintenance
   (Notification that Merlin will not be available at a certain time.)
   - Merlin will be unavailable from 1600 to 1700 CST on Wednesday 09/01.
   - Merlin will be rebooted at 1 pm CST, please log off.

b. A particular application has problems.
   - UNIFI update did not load last night – Do not resubmit.
   - The Web Server at KC will be unavailable due to emergency Security Patch updates.
   - News Flash Warning – New Virus Attack
   - All CCE xxx Warranties due to expire next week.
   - Exchange server in AGEAST is down.

c. A major network outage in a specific area.
   - A communication lines in Chicago area down due to construction accident.
   - Florida offices closing early due to Hurricane Omega.
   - Washington DC offices closed due to Ice Storm
   - NFC uplink not available.

Even if White Board identifies that problem is known and being worked upon. <u>You should still submit a ticket when appropriate.</u> This will serve multiple purposes. You will be notified when problem resolved – this is useful when a communications problem or when application is available again. Sometimes the Tier II or Tier III Service Desks ask for specific sites having a problem, so that they can determine is system wide or local problem.

1. **Procedure to Create Ticket linked to White Board (WB).**
   a. Dbl-Click on White Board Area
   b. Highlight the Whiteboard in the Notices area by clicking on it.
   c. Under the Actions tab, select **[ Create Incident From White Board ]**
      Or
      **[ Dbl-Click on the desired WB record ].** The fields on the ticket will fill based on the WB information.

      1) Complete ticket by filling in any empty fields and Click **[ Save ].**

   d. The ticket is now linked to White Board.
   e. When WB is closed the resolution from the WB will be the resolution for your ticket.
   f. Merlin will notify you that your ticket is closed.

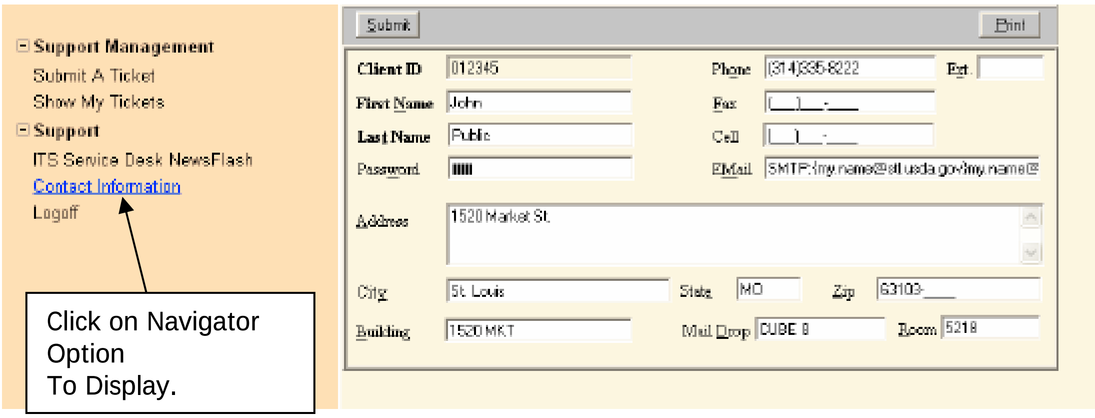
All tickets linked to the WB whether 1 or 200 tickets will be closed with the resolution, based upon the Whiteboard resolution.

## Contact Information

ALL INFORMATION in Contact Information was originally retrieved from CAMS data, if in error your personnel data may also be incorrect.

**If Information MISSING – ENTER IT *** If Information INCORRECT – CHANGE IT.**

It is the individual's responsibility to contact their servicing Human Resources office to have it officially corrected in CAMS.




Screen 13 – Contact Information Screen

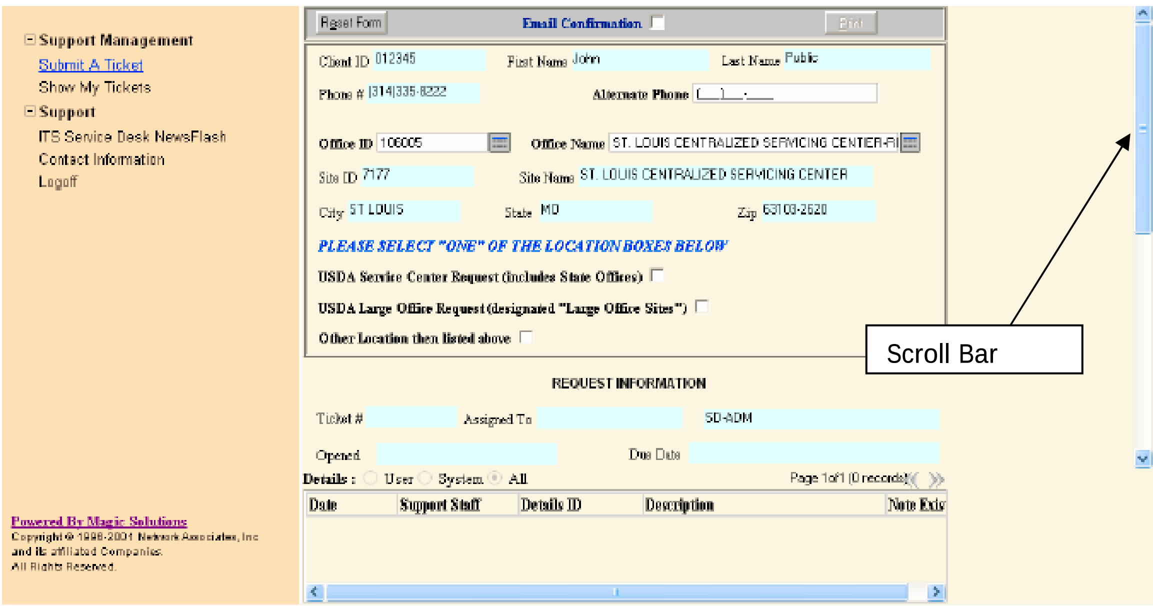
Contact Information Module Fields

| Field Name | Description |
|---|---|
| Client ID | Self Service Login ID |
| First Name | First Name (Official Payroll Name). |
| Last Name | Last Name (Official Payroll Name).<br>Must be changed through servicing HR office. |
| Password | Create/Change Password |
| Phone | Telephone number. |
| Ext | Phone Extension |
| Fax | Fax Number for Contact |
| Cell | Cell/Mobile Phone Number (Official Work Phone) |
| Email | Email address |
| All Location information is retrieved from OIP data. Based upon OFFICIAL Site location. | |
| Address | Address for the site. |
| City | City name for the site. |
| State | State abbreviation for the site. |
| Zip | Zip code for the site. |
| Building | Name of Building |
| Mail Drop | Mail Drop / Cubical / Post Number |
| Room | Room Number within Building |

The Building, Mail Drop and Room information is primarily used by Local IT Support (Large Office). If unsure what to enter, check with local IT Support for the policy in your area.

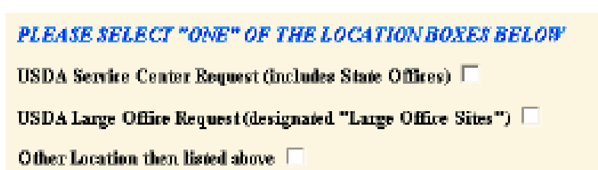
## CREATING/SUBMITTING A MAGIC SELF SERVICE TICKET

1. Click on the **[ MAGIC (Welcome to Self Service Desk ) ]** shortcut icon on your desktop, then choose your **language** by clicking on the link.
2. Enter your **[ MAGIC Client ID ]** and **[ Password ]**, then click **[ Sign In ]**.
3. Under SUPPORT MANAGEMENT on the navigation bar (left side of the MAGIC window), click on **[ Submit A Ticket ]**.
4. The form shown in the following Screen will appear with your information filled in.
   a. The fields that have a blue background are not be changed.
   b. If in error open Merlin ticket using Subject: **Magic User** located under *Magic Merlin Administration Requests* in Subject Tree.
   c. Use the Scroll bar to view lower portion of Magic Ticket.




Screen 14 – Magic Ticket Screen

2. At the top of the form, place a checkmark in the box behind [ Email Confirmation ] if you would like an email confirmation message of your ticket submission.
3. IMPORTANT
   Select one of the Location Boxes by **[ Clicking ]** the box. A check mark will be placed within the box.




Screen 14.a – Support Location

Refer to Next Page for Description of each option.

a. USDA Service Center Request (Including State Offices)
   1) This includes ALL State and County Offices. Tier1 (first Level support) is provided by a member of the State IT Staff.
   2) If your email address includes a 2 letter State abbreviation in the email domain name [<account>@<domain>] you are most likely supported by State IT personnel.

      Example: Firstname.Lastname@**MO**.usda.gov, is supported by Missouri State IT Staff.

b. USDA Large Office Request (designated "Large Office Sites")
   1) This includes ALL personnel in locations supported by Local System Administration Groups.
   2) Individuals supported by the Large Office Groups will normally match an email domain [<account>@<domain>] listed in table below.

      Examples:
      Firstname.Lastname@**STL**.usda.gov supported by St. Louis Large Office (LO-STL) IT Staff.
      Firstname.Lastname@**KCC**.usda.gov supported by Kansas City Large Office (LO-KC) IT Staff.

Local System Administration – Large Office Support Sites

The Local System Administration Groups known as Large Office Groups. These Large Office Groups (listed below) support the personnel located in specific locations/buildings.

| Group | Email Domain | Internal IT Support for Locations |
|---|---|---|
| LO-CO | @ftc.usda.gov | Fort Collins, CO |
| LO-DC-MD-VA | @wdc.usda.gov | Washington DC, Beltsville, MD, and selected Maryland and Virginia locations. |
| LO-KC | @kcc.usda.gov | Kansas City, MO - FSA sites. |
| LO-NC | @gnb.usda.gov | Greensboro, NC |
| LO-NE | @lin.usda.gov | Lincoln, NE - NSSC and NSMC users. |
| LO-OR | @por.usda.gov | Portland, OR |
| LO-STL | @stl.usda.gov | St. Louis, MO - RD Finance Office and FSA (GF), Centralized Servicing Center and RD (1520), and Training Branch and SD (2350) |
| LO-TX | @ftc.usda.gov | Fort Worth, TX |
| LO-UT | @slc.usda.gov | Salt Lake City, UT |

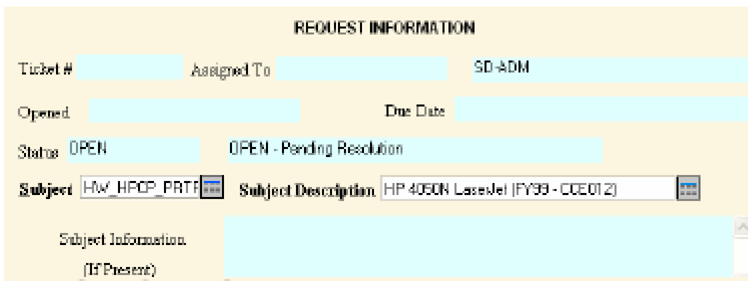
a. Other Location then listed above.
   1) This includes personnel that may be located at a site other than an official USDA Office, such as at a College or University. Even if in this category and are normally supported by State or LO IT Staff, select the appropriate Group (box) when submitting Ticket.
   2) This includes personnel that may are not an OCIO, FSA, NRCS or RD employee. Some key contractors or vendors, eAuthorization or other specific application key personnel may have a Self Service Account.

4. If you do not select one of the above boxes you will receive the following message.


Screen 15 – Support Location Missing - Warning Pop-Up Screen

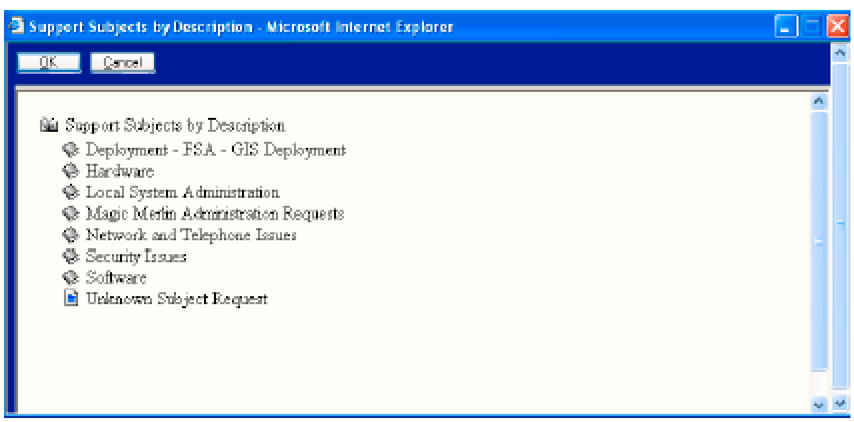
   a. Click on **[ CLICK HERE ]** button and check one to the Location boxes before continuing.
   b. If you click on the Red X  and close the box and continue without any box checked this may delay your request for assistance. The ticket will be manually rerouted, but could end up with the wrong support Group and delay the processing of your request..

Screen 16 – Magic Ticket Screen – Subject




## SUBJECT SELECTION

5. Click on the button to the right of the [ Subject ] field to receive an available list of subjects. (See the following Screen).




Screen 14.b – Support Subjects by Description Screen

   a. This list is constantly updated with changes to the systems and software, so you need to check carefully to determine which subject best describes your needs.
   b. Click on the book icon (to the left of the subject) to expand the list. The following screen print shows Software as the subject.

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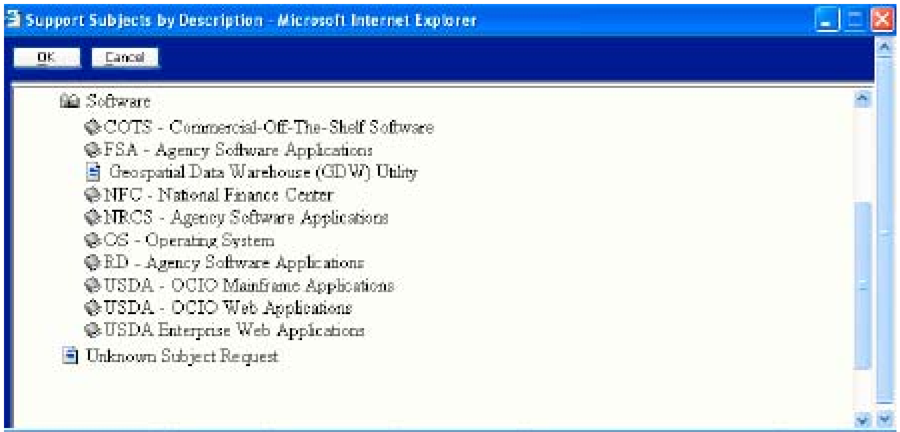
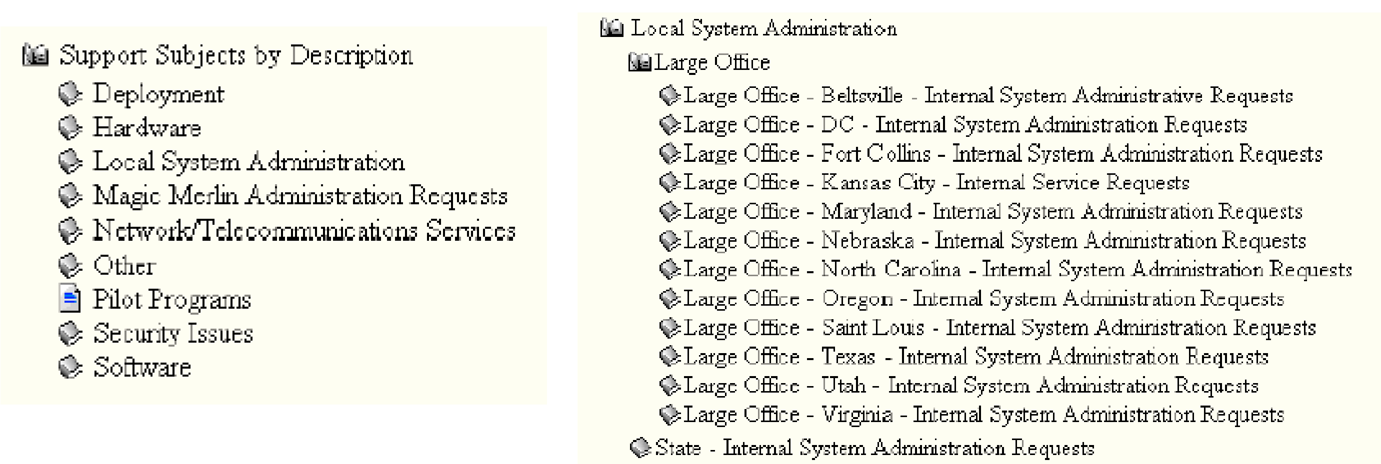



Screen 14.c – Example Software Subject Tree

c. **Drill down** and choose the **subject that best describes the problem you are having**. Continue to drill down as needed.
The following screen print references a problem with an Exchange Outlook Issue (COTS Commercial-Off-The-Shelf Software → Microsoft Applications → Microsoft Outlook → Outlook issues relating to Exchange).

d. Being as specific as you can will help the ITS staff that pick up the tickets know where your problem lies. If you can't find the exact topic then try to pick a subject that at least points in the general direction.

e. There is a separate portion of the subject tree specifically designed for the Large Office users (see table next page). These subjects are more General in nature than the other portions of the Subject Tree. Each of the locations have a similar list of subjects. Large Office Self Service users are not limited to this portion of the Subject Tree, any items in the Tree can be selected, if you feel that it is more appropriate, even if you are supported by a Large Office IT Staff.




Screen 17 – Example Software Subject Tree with Large Office Expanded.

## Large Office Merlin Self-Service Subjects

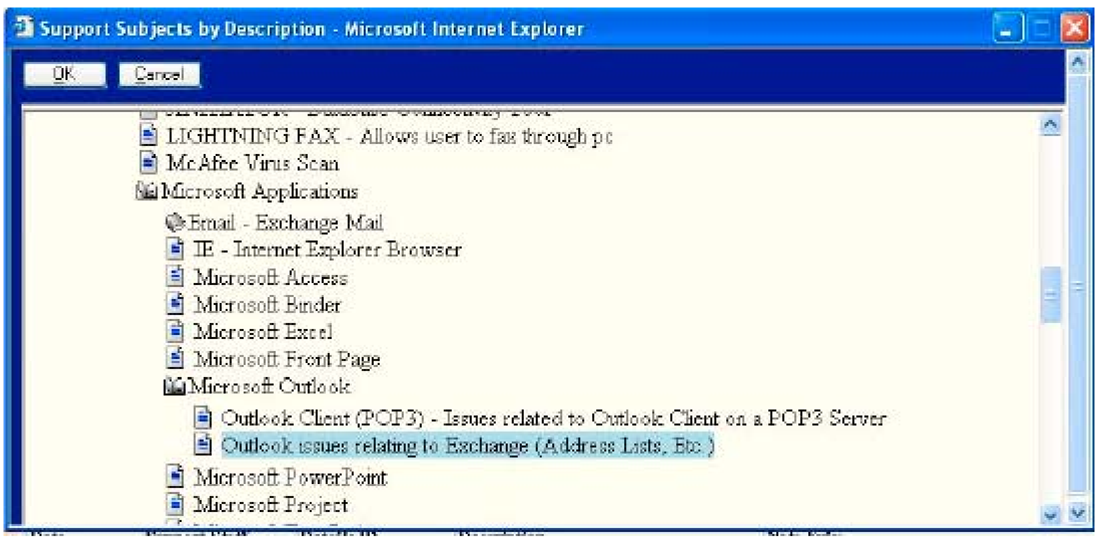
For the Subjects below, a short definition is included for each. Subject Descriptions are **BOLD**.

| Subject ID | Description |
|---|---|
| General Support | **Large Office – <Site Name> - Internal System Administration Request**<br>Request for IT support. Specify specifics.<br>The subject is not yet known or a general non-specific request.<br>Additional troubleshooting with assistance of Service Desk is required. |
| General Support | **LO-XX-Employee Processing**<br>Related to specific employee. New or former employee action/support being requested. |
| Hardware Issues | **LO-XX-Hardware Issues**<br>The problem is thought to be a hardware related problem.<br>These include Warranty calls and repairs to internal devices/cards |
| Hardware Issues | **LO-XX-Laptops Issues**<br>The problem is related to a Laptop hardware issue. Includes Docking Station, Monitor, Keyboard and Mouse.<br>These include Warranty calls and repairs to internal devices/cards. |
| Hardware Issues | **LO-XX-Other Hardware Requests (Camera, FAX, Tablets, GPS and Other Equip)**<br>The problem is related to a Camera/ PDA (Tablet)/ GPS or other non-specific equipment hardware issues.<br>These include Warranty calls and repairs to internal devices/cards. |
| Hardware Issues | **LO-XX-Printer Issues**<br>The problem is related to a Printer hardware issue.<br>These include Warranty calls and repairs to internal devices/cards. |
| Hardware Issues | **LO-XX-Server (and Peripherals) Issues**<br>The problem is related to a Server/ UPS/ Tape Drive or other peripheral hardware.<br>These include Warranty calls and repairs to internal devices/cards. |
| Hardware Issues | **LO-XX-Workstation Issues (Desktop)**<br>The problem is related to a Desktop/Workstation hardware issue. Includes Monitor, Keyboard and Mouse.<br>These include Warranty calls and repairs to internal devices/cards |
| Network Issue | **LO-XX-Network**<br>Applications (VPN, VOIP, Frame Relay, AS400) |
| Network Issue | **LO-XX-Internal LAN**<br>Problems related to accessing internal LAN resources, like printer connectivity or loss of your network drives. |
| Network Issue | **LO-XX-Network – Domain Issues**<br>Any problem related to connectivity to USDA domain, either dial-up or in office. |
| Hardware Issue | **LO-XX-Network Hardware**<br>The problem is related to the Network Hardware. Router, Cabling, etc. |
| Network Issue | **LO-XX-WAN**<br>Problems related to Internet connections |
| General Support | **LO-XX-Office Configuration**<br>Usually related to moving or adding employees or equipment |
| General Support | **LO-XX-Other Internal System Administration Requests**<br>Issues not specifically defined. |
| Security Issue | **LO-XX-Security Issues**<br>Physical and/or Software security issues, like Virus attack, stolen equipment, new password requests. Request locked/inactive password be unlocked/reset. Specify the System or Application. |
| Software Issue | **LO-XX-Software Issues**<br>This problem is thought to be software (installation/configuration) related issue. |

| | |
|---|---|
| Web Farm Issue | **LO-XX-WebFarm Requests**<br>Unable to connect to specific Website or issue related to specific USDA Website. |
| Agency Specific | **FSA – Agency Specific Software Applications**<br>The software application is a Farm Service Agency specific application. |
| Agency Specific | **NRCS – Agency Specific Software Applications.**<br>The software application is a Natural Resources Conservation Service specific application. |
| Agency Specific | **RD – Agency Specific Software Applications.**<br>The software application is a Rural Development specific application. |

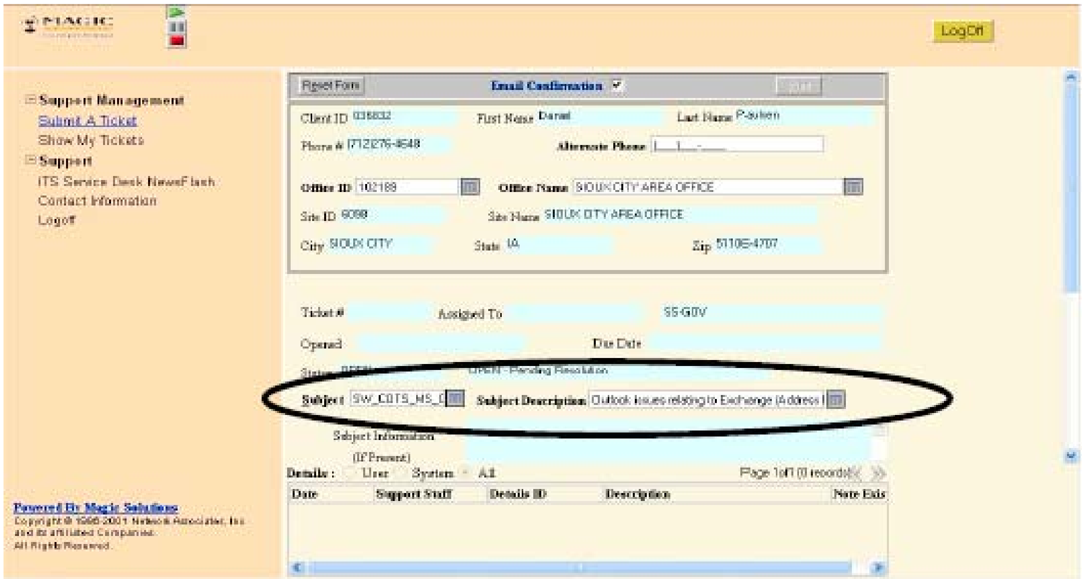
Table 1

Regardless of the Subject used, the Problem Description is the key to getting prompt and accurate return contact from next level of Service Desk Support. Based on Subject and Description your ticket will be routed to the BEST area that can resolve your problem. Missing and inaccurate information will only delay the process.




Screen 18 – Example of Drilling Down the Subject Tree

6. **Highlight** the desired Subject by **[ Clicking ]** on it and then Click on **[ OK ]**. The subject description will automatically fill in. See the following screen print.
   a. If you are having problems determining the correct subject header, highlight the ***closest*** subject to your problem and click **[ OK ]**.



Screen 14.d – Subject/Description Fields Automatically Filled In

## REQUEST DESCRIPTION

7. Use the blue scroll bar on the right hand side of your screen to move to the bottom of the page and click in the **Request Description or Note** field.
8. Type in a **detailed description of the problem you are experiencing**. Try to be clear and concise. Refer to the following screen print.

Screen 14.e – Request Description or Note Field

a. The Request Description is sometimes called the Problem Description. When entering the description of problem you may not know the answers to the questions below. The are only suggested responses, but attempt to do the following:

b. Depending on the actual problem the requirements may change. Following are some common traits that will assist and expedite the process.

- What is the exact nature of the problem?
  - What were you trying to do?
  - What type of equipment is it being performed on?
  - Has it ever worked? If so, when did it stop working?

- Has anything been recently installed, replaced, moved, or restored?

- Is the problem isolated to the user, a single piece of equipment, or whole system?
  - Can you move to a different PC and complete the task/work?
  - Are other users in the office able to perform the function?

- What instructions are you following? Version? Who provided?

- When using abbreviations attempt to use the standards identified in the Appendixes at back of this guide.
  - Appendix A - Glossary of Terms and Abbreviations
  - Appendix B – TERMINOLOGY / COMPONENT / HARDWARE / SOFTWARE
  - Appendix C – APPLICATIONS and Office/Agency Acronyms

Hardware Problems

- Make and Model (CCE number if known)
- Serial/Tag Number
- Error Messages / Symptoms of what it is or is not doing.
- Any troubleshooting steps that you may have already performed.
  - Swapped with known working piece of equipment. Results?
  - Ran diagnostics application/program. Results?

Software Problems

- Application/Software Name (Version?).
- Make and Model of equipment on which running application. (CCE number if known)
- Error Messages/Symptoms of what it is or is not doing.
  - What were you doing when the error first appeared? Entering, Editing, Deleting, Configuring, Moving, etc.
- Troubleshooting steps that you may have already performed.
  - Web or Internet application, does it work from another location or known working piece of equipment.
  - Ran diagnostic disk / Application.

Network Problems

- Does it affect just you or the whole office?
- Anything special about your office configuration?
- Has anything changed lately?
- If Web site problem, list the URL
- Have you had a storm or power surge?

### Special Notes

Special Notes should be used to provide additional information that though useful is not specific to problem. Sometimes customer information may be helpful in troubleshooting. Normally this type of information can be acquired by Service Desk when they contact you. Remember – Even though, this a secure URL, **DO NOT enter Privacy Act Information** in Ticket about our customers. Social Security Numbers, Account Numbers, and Passwords **should NEVER be included** in any Self-Service Ticket.

The type of information that can be useful to the Service Desk staff and could be placed in the Special Notes include:

- An alternate Contact Person (Name and Phone/Ext)
    - Who can access equipment or application – tell them what is going on.
- Out of Office for training tomorrow, call Thursday.
- This is a State Dir PC, call back immediately.
- An "Impact" and "Urgency", Every ticket should be assigned an appropriate priority.

The matrix below can be used as a guide in determining Impact/Urgency.

| | Global | Area (Domain, State, Agency, Group) | Site (FSC) | Individual (User or Workstation) |
|---|---|---|---|---|
| Critical | A-1 | A-2 | A-3 | A-4 |
| | A sever/condition that causes an outage, failure, etc. Condition is Mission Critical and must be restored | | | |
| High | B-1 | B-2 | B-3 | B-4 |
| | A serious condition that impairs the operation, or continued operation, of one or more functions or features. Condition delays Mission | | | |
| Medium | C-1 | C-2 | C-3 | C-4 |
| | A non-critical, limited problem (no data lost or system failure). It does not dramatically hinder operation. Condition delays Mission. | | | |
| Low | D-1 | D-2 | D-3 | D-4 |
| | Non-critical problems or general questions about the product. Condition is NOT Mission Critical. | | | |
| STANDARD | Routine request Designated for SAAR Requests and/or general Service, etc. | | | |
| | Default Urgency. | | | |

<u>Some General Guidelines:</u>

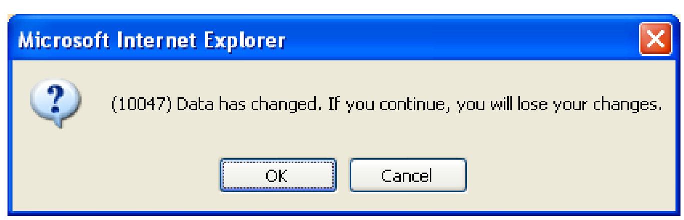
Note: It is possible that a person (State Director for instance) or time critical application could be assigned a higher priority than it normally would. But not every case can be the highest priority.

### <u>Submit Ticket</u>

9. When you have completed typing your problem description, click on the [ Submit ]. Your request for assistance will be sent to your IT Support Group.
    a. If at any time during completing the ticket you would like to clear the form and start over, simply click the [ Reset Form ] button on the left side of the gray bar.
    b. Warning Pop-up. This pop-up displays if attempting to leave a screen without saving/submitting updates.

Cancel will return to screen to allow Save/Submit.

OK will void all entries on prior screen.




Screen 19

**<u>Addition Comments</u>**.

Once submitted you will know the ticket number. If you have placed the Error message (Screen print) in a document or additional information you can Email the Service Desk and they can attach the document/file to the Ticket or Work Order. But please include something like suggestions below in the Email Subject:

Subject: Ticket #99999 Error Message attached
Subject: Ticket #99999 Additional Information

The attached document or file will be available to whoever works the ticket or work order. The key is to make sure that the Ticket Number is referenced. When tickets are assigned to individual Service Desk staff members you should receive an Email notifying you that ticket has been assigned. Could also email directly to the assigned staff, but always include the ticket number. Some Service Desk staff may have 20 or more ticket awaiting additional information from site, so you would want to make sure your information get linked to correct ticket.

Working with Pop-up Data Lists - Pop-up Icon 

There are fields within Merlin SSHD that have pop-up data lists associated with them. The data list can be accessed by clicking the pop-up icon. A pop-up icon is the small gray box with lines to the right of an input field.

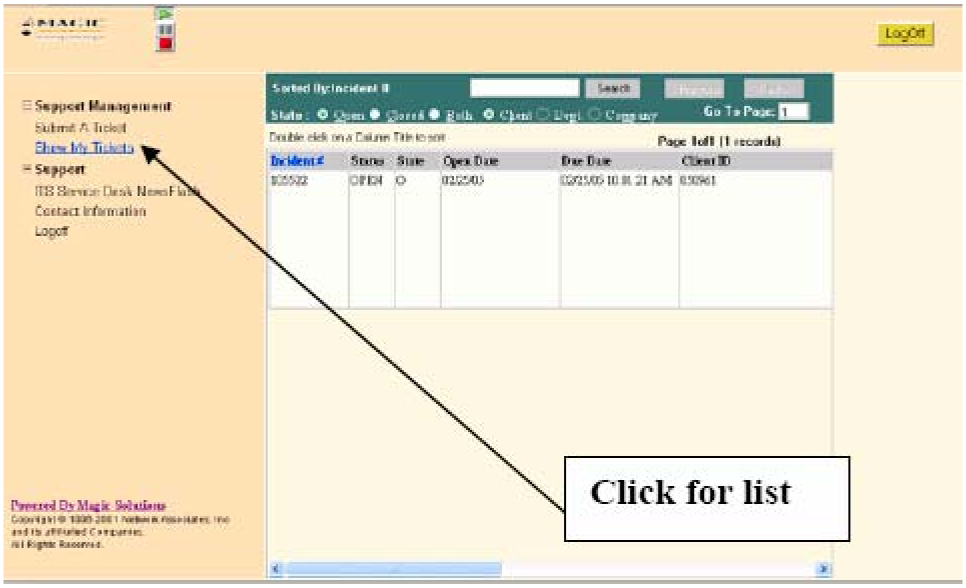
Self-Service uses this Pop-up Icon for following fields

- Office ID
- Office Name
- Subject and Subject Description

## CHECKING THE STATUS OF YOUR TICKET

After you have submitted a Self Service Ticket, you can view the status of the ticket.

10. Log into the MAGIC Service Help Web Site.
11. Under **SUPPORT MANAGEMENT** on the left side of the MAGIC window, click on **[ Show My Tickets ]**.




Screen 20 – Show My Tickets Screen

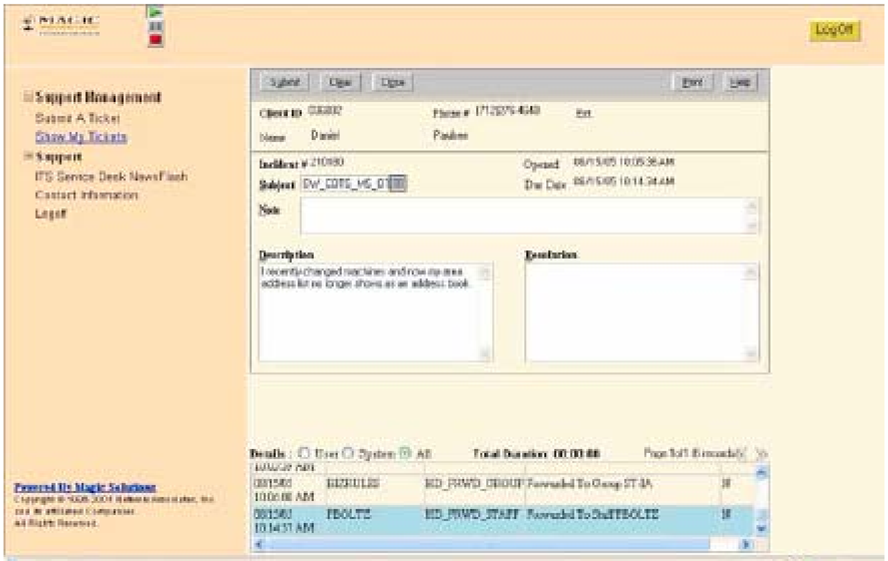
a. To move forward to next page
   1) Click on Next button
      Or
   2) Increment "Go To Page" by 1 and press ENTER key.

b. To Move forward several pages
   1) Click on Next button until at desired page
      Or
   2) Change "Go To Page" to desired page number and press ENTER key.

c. To Move back to prior page
   1) Click on Previous button
      Or
   2) Change "Go To Page" to desired page number and press ENTER key.

---

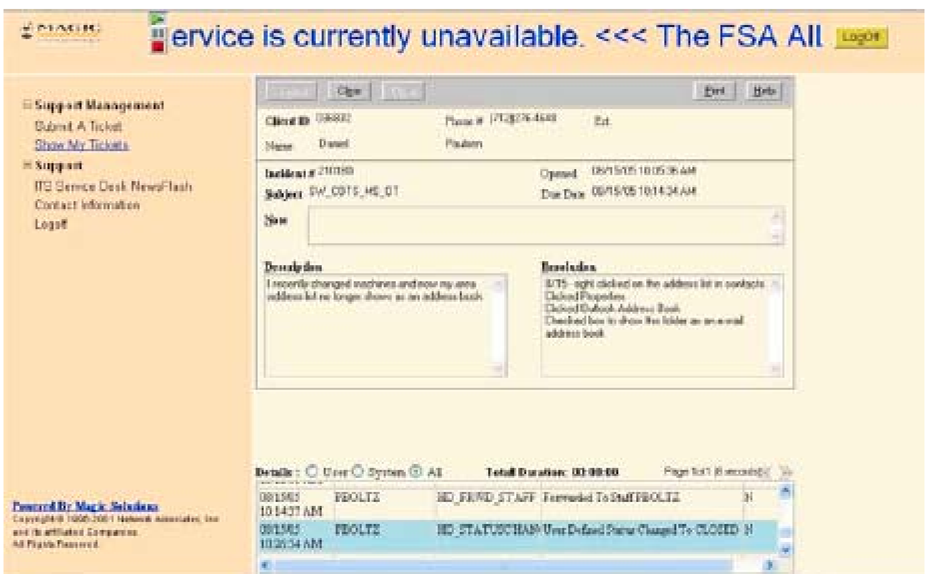
12. Double click on the **ticket where the Incident #** is to check on the status. Click for list




Screen 20.a – Ticket Status Screen

   a. The Details section at the bottom of the screen shows you all the steps that have been taken on this ticket since it was submitted.

13. Once the problem is resolved, the person responsible will enter the action(s) taken in resolving the problem in the Resolution section and the ticket will then be closed.




Screen 20.b – Problem Resolved and Ticket Closed

   a. This ticket can then be viewed in the future, should you encounter this problem again.

14. All tickets can be viewed after they are closed by clicking either the [ Closed ] or [ Both ] radio button on the Ticket Listing. The default is only the [ Open ] tickets.

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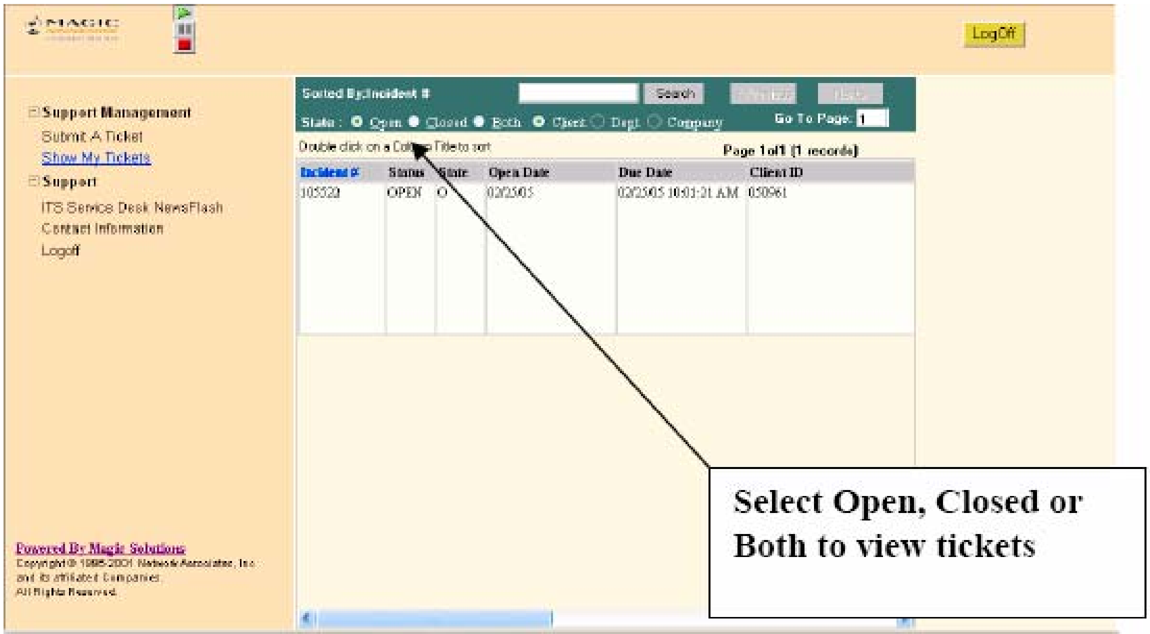



Screen 20.c – View Open, Closed or Both Tickets

15. When you are finished with your session, click on **[ Logoff ]** either in the Support section or in the upper right corner of the MAGIC screen.
16. At the **MAKE SURE ALL TICKET WINDOWS ARE CLOSED** window, and click **[ OK ]** to confirm.

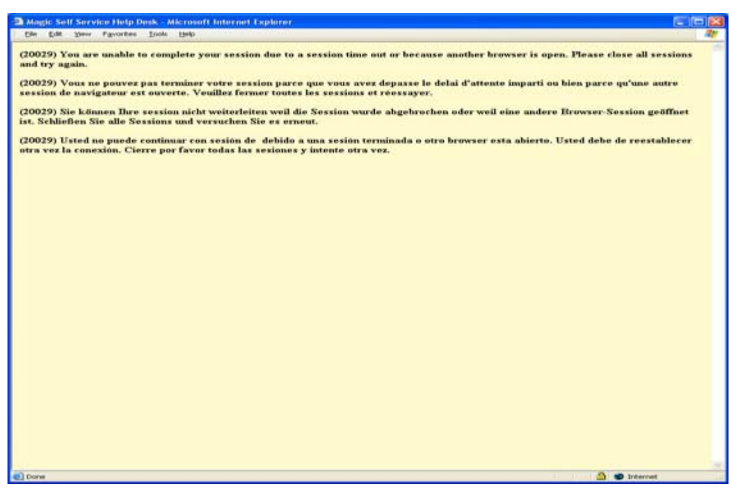

Screen 21 – All Windows Closed

17. Time-Out Screen

If Logged In to Self-Service and No activity occurs for a specified period, the system will disconnect.

**All unsaved entries will be lost**, and must be reentered after logging on again.

I a ticket was saved and still open, it could be locked and can not be processed.



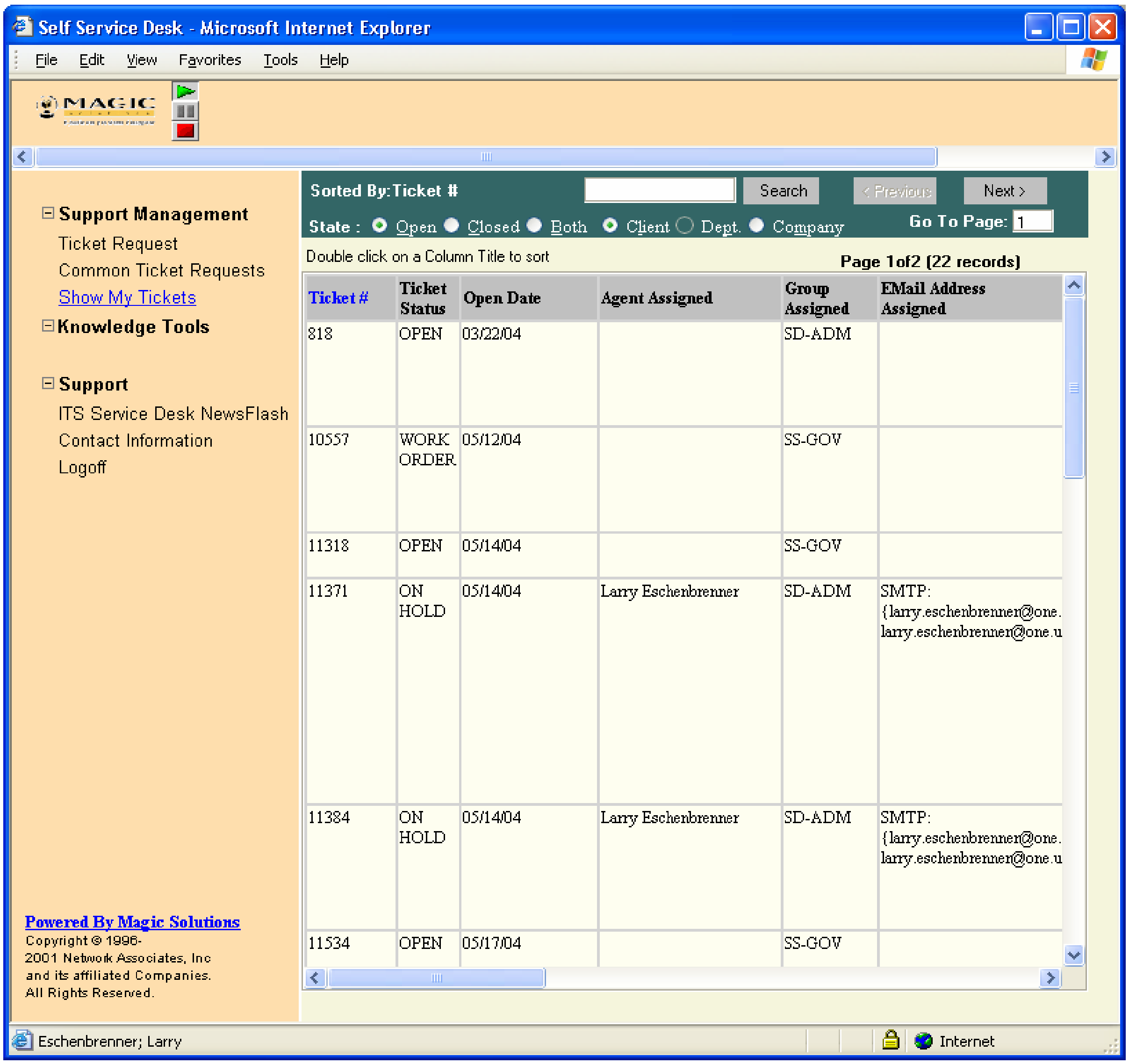
Screen 22 – Time Out Message Screen

a. It is important that you Save/Submit in timely manner. Merlin should be the only browser session open, opening another session will time-out (kill) the current session. This could happen if you open a web page from your email while logged into Merlin Self-Service.

18. Permission Denied
    a. This pop-up may occur if you attempt to access an option that is not currently active or you do not have permission to access.


Screen 23

## Show My Ticket Screen




Screen 24

The Sorted By, column heading in displays in blue.

The State: 0 Open 0 Closed 0 Both 0 Client 0 Dept 0 Company
This is the Status of the Tickets to be displayed (Open/Closed/Both) and Source of Tickets that match your Site ID. The defaults are Open and Client.

**My Ticket Screen Columns**

**Ticket #**
The first column of the screen shows the number assigned to track the call. This is key it that use to reference each call. Use this number when providing additional information or requesting updates.

**Ticket Status**
The second column of screen shows the ticket status, the above chart assist in determining the meaning of the six different conditions that the status could be identified with. Only option 1 is a Closed ticket, all others are Open tickets. A short explanation of the Status ID's are:.

The 6 options for status are currently:

| **Status ID** | **Description** |
|---|---|
| CLOSED | Problem Resolved<br>No further action required – Ticket Closed.<br>If not resolved, contact Service Desk and reopen ticket. |
| OPEN | Pending Resolution |
| NO NOTIFICATION | Notifications are not generated<br>Same as OPEN status, only that No Notifications (Emails) are sent to Caller or Contact each time the ticket is updated or reassigned. |
| ON HOLD | Pending more Information<br>Service Desk is waiting for additional information or the availability of some item or person to continue work on ticket. Awaiting parts, waiting for caller to be available are 2 frequent reasons placed on hold. |
| RESOLVED | Open with Resolution pending review<br>Awaiting confirmation that the suggested resolution corrected the problem. This is normally used when awaiting confirmation from end-user/site that problem is actually resolved. |
| WORK ORDER | 1 or more WOs have been generated<br>Another Group or Service Desk is working on problem. A Group other than the one that owns the ticket has to perform some type of action or problem has been sent to a specialized Group to resolve. Agency specific applications are common tickets that will have Work Orders, along with Exchange or other Server applications that require a higher Tier support. |

If you have questions about Status ID, contact Service Desk Agent Assigned to have this changed or get additional information. **ON HOLD** and **RESOLVED** are two Status IDs where Service Desk is awaiting for additional information from Site/User.

**Open Date** (Third column)
Used to identify when ticket was opened.

**Agent Assigned** (Fourth column)
Used to identify the Service Desk Agent working the ticket. When blank, it is not been picked up or assigned to a specific agent.

**Group Assigned** (Fifth column)
Identifies the Group working your ticket. The primary Service Desk Groups are:

| | | |
|---|---|---|
| SD-STL | AGEAST | Rural Development |
| SD-KC | AGCENTRAL | Farm Service Agency |
| SD-FTC | AGWEST | Natural Resources Conservation Service |
| SD-ADM | Merlin Administration | |
| SS-GOV | Self-Service Government | |
| ST-XX | State IT Groups. The XX represents the State Postal Code, Missouri – MO, Hawaii – HI, Kansas – KS, etc. | |
| LO-WDC | Large Office Washington DC | |
| LO-FTC | Large Office Fort Collins | |
| LO-KC | Large Office Kansas City | |
| LO-STL | Large Office Saint Louis | |
| LO-XX | Large Office State (XX represents the State Postal Code, UT-Utah, NE-Nebraska, NC-North Carolina, OR-Oregon, TX-Texas) | |

There are over 130 Groups within Merlin, some are specialized software applications, and teams that work unique problems along with Tier II and Tier III support. The ticket will remain with the original Group that opened/receives your ticket. The Service Desk may then open Work Order(s) with the other Groups to provide a resolution or troubleshoot. The agent that has your ticket, may not actually have all the information about it's status immediately available to them. Requests for the status of your ticket may take awhile to get the information for you.

**Email Address Assigned** (Sixth column)
The Email address of the assigned Service Desk Agent.

**Subject Description** (Seventh column)
The Subject Description. This maybe different than the original Subject used to open your Self-Service ticket. Usually this is more specific than the general subject used to open the call.

**Ticket Description** (Eighth column)
The Request Description of the call. This may have been modified at the Service Desk to make more concise.

**Ticket Resolution** (Ninth column)
The resolution. This is usually only present on Closed or Resolved status tickets. Though in some instances there may be partial resolutions, depending on what steps have already been completed.

**Customer ID** (Tenth column)
The Customer ID of the individual that opened the call. If you have permissions to view all tickets for your site, you will see tickets other than your own tickets, if Company is selected.

**Customer First Name** (Eleventh column)
First name for the Client ID.

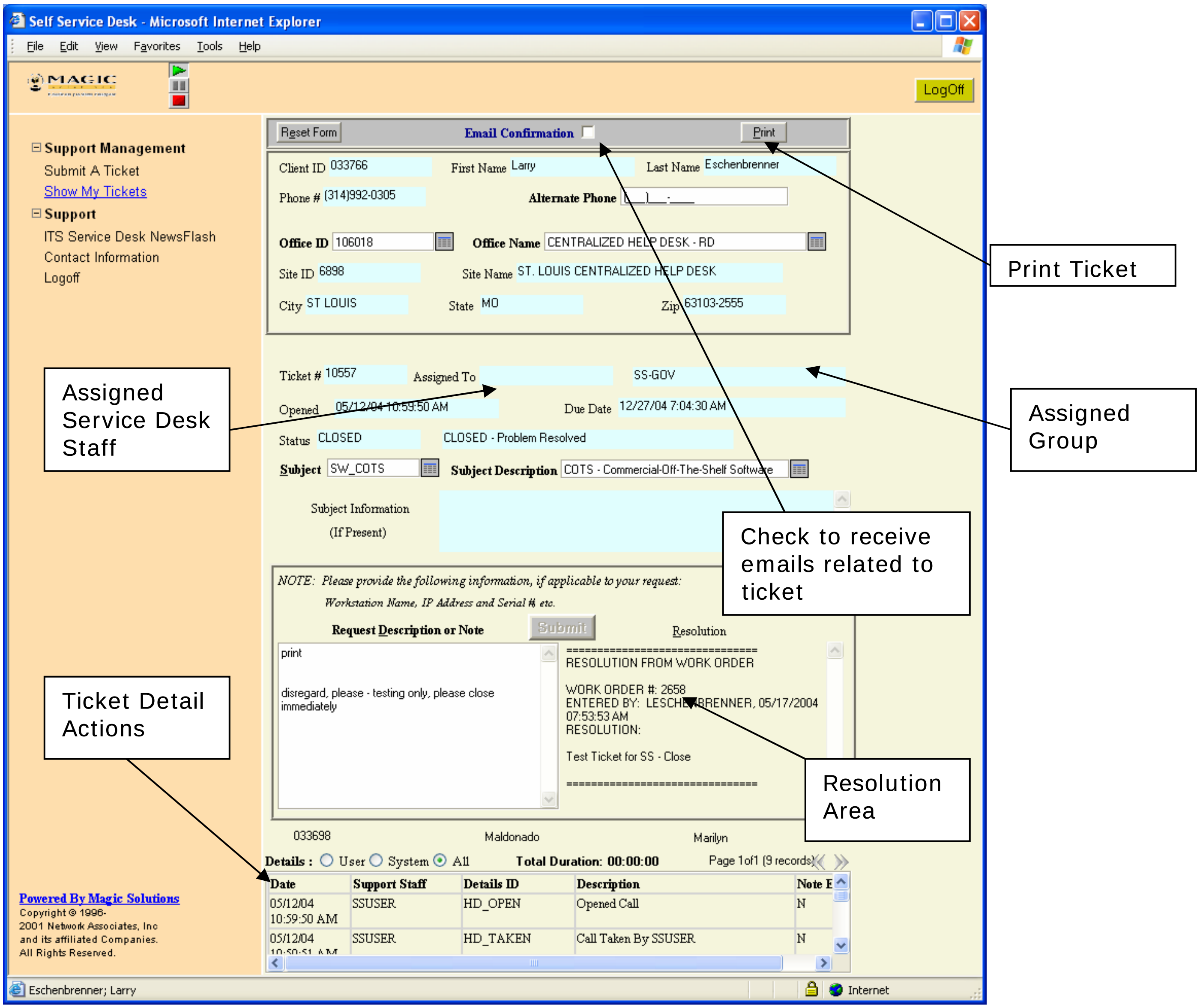
**Customer Last Name** (Twelfth column)
The last name for the Client ID.

**View Ticket**
Double click on the ticket to view the ticket. As your mouse moves over a ticket record it will turn blue, when desired ticket is blue double click and the ticket will open in the ticket request screen.

## About Your Ticket

The ticket selected from "Show My Tickets" has additional information displayed.

Resolution will display.
Ticket Details will display.
Ticket Subject and Subject Description.
Assigned Service Desk Staff and Assigned Group.
Print Ticket option.




Screen 25

Only System notes are visible.
System details are automatically added by the system. These details might include an escalation of your problem to a higher support level if not resolved by the original Group.

| Date | Support Staff | Details ID | Description | Note Exists |
|---|---|---|---|---|
| 05/12/04 10:58:25 AM | SSUSER | HD_OPEN | Opened Call | N |
| 05/12/04 10:58:26 AM | SSUSER | HD_TAKEN | Call Taken By SSUSER | N |
| 05/12/04 10:58:27 AM | SSUSER | HD_FRWD_GROUP | Forwarded To Group SS-GOV | N |
| 05/12/04 10:58:28 AM | SSUSER | SSHD_OPEN | Opened Call from Self Service Help Desk | N |
| 05/13/04 12:54:06 PM | LESCHENBRENNER | WO_OPEN | Opened WO 2658 | N |
| 05/13/04 1:01:50 PM | LESCHENBRENNER | HD_STATUSCHANGE | User Defined Status Changed To WORK ORDER | N |
| 05/17/04 7:50:21 AM | LESCHENBRENNER | WO_CLOSE | Closed WO 2658 | N |

The Ticket Action Details are system generated or user generated. ONLY SYSTEM generated actions display on the Self-Service Screen. The Support Staff is who controlled the ticket when the system generated the action.

The most common actions you will see are:

| | |
|---|---|
| HD_OPEN | When ticket was opened |
| HD_TAKEN | Who opened the ticket (SSUSER is a system user not an individual) |
| HD_FRWD_GROUP | Group ticket forwarded to (SS-GOV is holding Group for Self-Service) When System assigns to a Service Desk a similar action with different Group name will appear. |
| HD_STATUSCHANGE | A change to ticket status. |
| WO_OPEN | An another Group is working the ticket. |
| WO_Closed | Other Group completed an action. |
| HD_Close | Service Desk completed action – Ticket Closed. |

Note Exists = Y
Double click on detail and pop-up appears from which can read note, if exists. Can not edit these notes – Read Only.


Screen 26

User notes are inserted by Service Desk personnel, they generally are notes or actions taken or actions in progress. These currently are not visible to Self-Service.

**Print Ticket**
When printing ticket, it prints like a screen print. If problem description or resolution is larger than what can be displayed in the area provided, it will truncate. Scrolling prior to printing does not change the print view. (This will be addressed in future version of self-service).

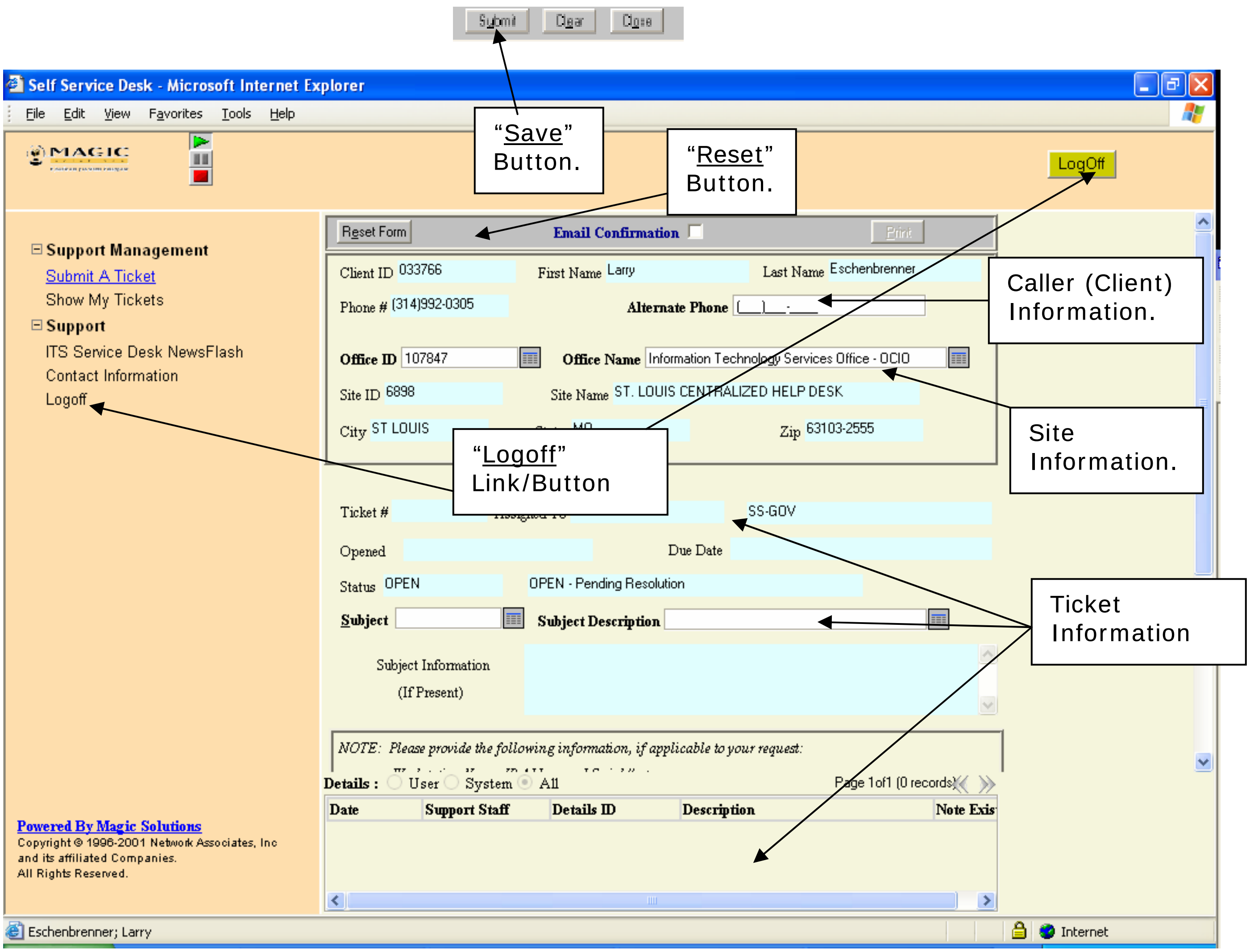
**Email Notification**
When you desire to receive email notifications related to the ticket, check this box.

## Summary Ticket Request Procedures

Perform following steps.

1. Verify or change Site Information.
2. Place Check in box to route to Support IT Staff
   **Important**
   a. USDA Service Center Request (Including State Offices)
   b. USDA Large Office Request (designated “Large Office Sites”)
   c. Other Location then listed above.
3. Enter Select Self-Service Subject.
4. Enter Request (Problem) Description.
5. Enter Special Notes if appropriate.
6. Click Submit (Save) button.

Each data field is discussed in following sections.




Screen 27 - Ticket

**Caller Information**

Caller (Client Information) is retrieved from the information on the Contact Information Screen. Alternate Phone (Optional) is secondary phone number to contact you.

**Site Information**
The default is the site where you are officially assigned – <u>THIS SHOULD BE YOUR SITE</u>. This will be the site linked to "Show My Tickets".

If this is not the location of the service request, change to reflect point of service. All Site information is interconnected. Changing any item will change all the other site fields.

## How To Select Site

**Searching within a Pop-up Data List**
There are several methods for locating a record within a pop-up. By default, the far left column is selected and sorted by, hence it is in **blue**. Next to the "Search" entry box you can see how many records there are and how many pages it takes to see all of them. In the Company Pop-up (Screen 10) for example, results are sorted on the Company ID column. You may re-sort on any column by double-clicking the column heading. The name of the column will then become italicized, and turn **blue** to indicate on which column the data is sorted.

**NOTE:** Sort orders are not remembered. If you want your data to be sorted on a specific column, you will need to double-click that column each time you access the pop-up window.

If there are many pages of data returned, you may scroll through the records using the paging buttons located in the top area of the pop-up window. With these buttons you can:

Go to the "Next >"page
Go Back to the "< Previous page"
Jump to a specific page by using the "Go To Page" function

You will see these paging buttons throughout the application on the top section of a form.

When trying to locate a specific record, it may be necessary to refine your search. This can be done using the Search option.

You can continue to narrow the data displayed by performing a search. To do this, use the Search Box field.

Note: You can sort by columns but you can't reorder the columns. If additional columns available, but not visible, use scroll bar on bottom of screen to view other columns. [Such as on "Show My Tickets" Window]

**Common Characteristics of the Company Pop-up**
To display ALL Company ID's (on Screen 10.1)

- Clear text from search box and click on Search button.

This displays ALL the records available. (Currently over 11,000 sites)

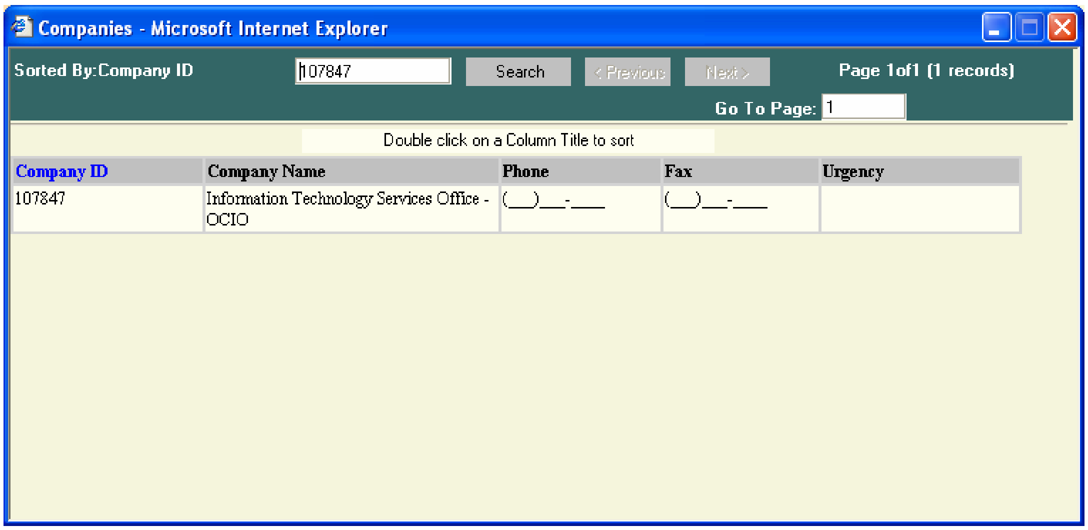
Once ALL selected, can double click on any column and narrow search by entering text in search box and clicking on Search button. The search is on the "Sorted By" field. Comment: (ST) 204 records, (ST.) 15 Records, (Saint) 21 Records. ST LOUIS, ST. LOUIS, and SAINT LOUIS may all represent the City of Saint Louis, but only the Cities that exactly match the entry will display. It can be difficult at times to locate specific site.

If Office ID known (from Screen 10)
Replace the current Site ID with desired Office ID and press TAB key.
This populates form with data for new site.
Or
If multiple Offices at Site, Company pop-up window appear (Screen 10.1) from which Company ID (Office ID) can be selected.

Double Click on a pop-up Column Title to Sort by that Column.

Replace text in Search box with full or partial search pattern based on “Sorted By” field and click on Search button.

**Companies Pop-Up Window** (Screen 10.1)
Office ID same as Company ID’s (Office ID) on pop-up form




Screen 28

To select different Site ID
Replace Site ID (on Screen 5) with correct Site and press TAB key.
or
Select the Company ID (Office ID) by double-clicking

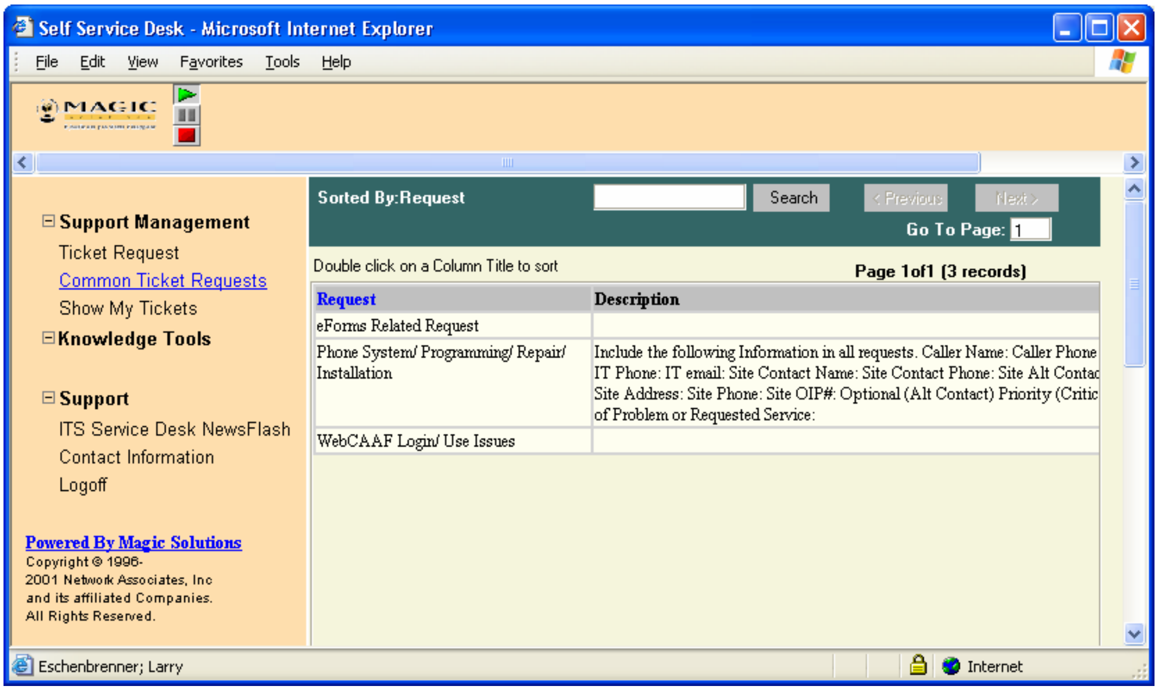
To select different Site ID (currently not displayed)
Clear data in Search box and click on Search button [displays All sites]
Double click on Company Name column [will sort by Company Name]
Enter full are partial name of site and press Search button.
Select the Company Name by double-clicking, may have to continue narrowing search by updating search pattern.

To select different Site ID
Clear data in Search box and click on Search button [displays All sites]
Double click on Company Name column [will sort by Company Name]
Enter full are partial name of site and press Search button.
Select the Company Name by double-clicking, may have to continue narrowing search by updating search pattern.

## **Common Ticket Requests** (Not Currently Active)

Common Ticket Requests are sometimes referred to as Recurring Tickets. When same problem are frequently reported it is sometime determined that a template should be made to speed up or standardize the reporting process.

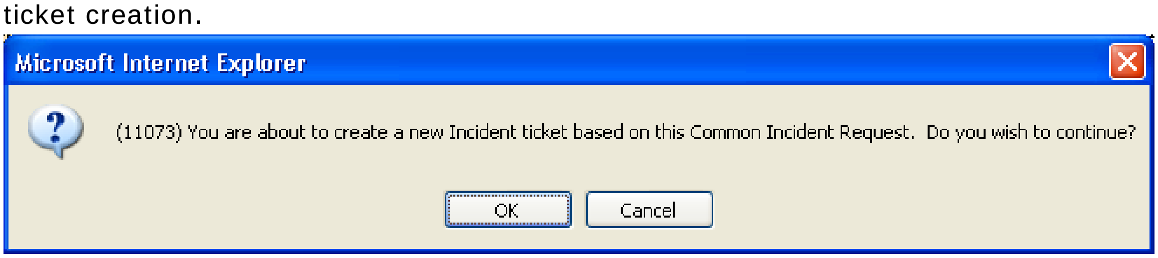
These templates usually have the same Problem/Request Description, Require the Same Information and may be assigned to a special Service Desk Group that primarily handles this unique problem.




Screen 29

Sample of a Common Tickets. Will be added as Self-Service option when it is determined what type of problems will be reported most frequently using Self Service.
To Select a Common Request, double click on the desired request.

After double-clicking on the request, this pop-up will display. Click on OK to continue or Cancel to void the ticket creation.




Screen 30

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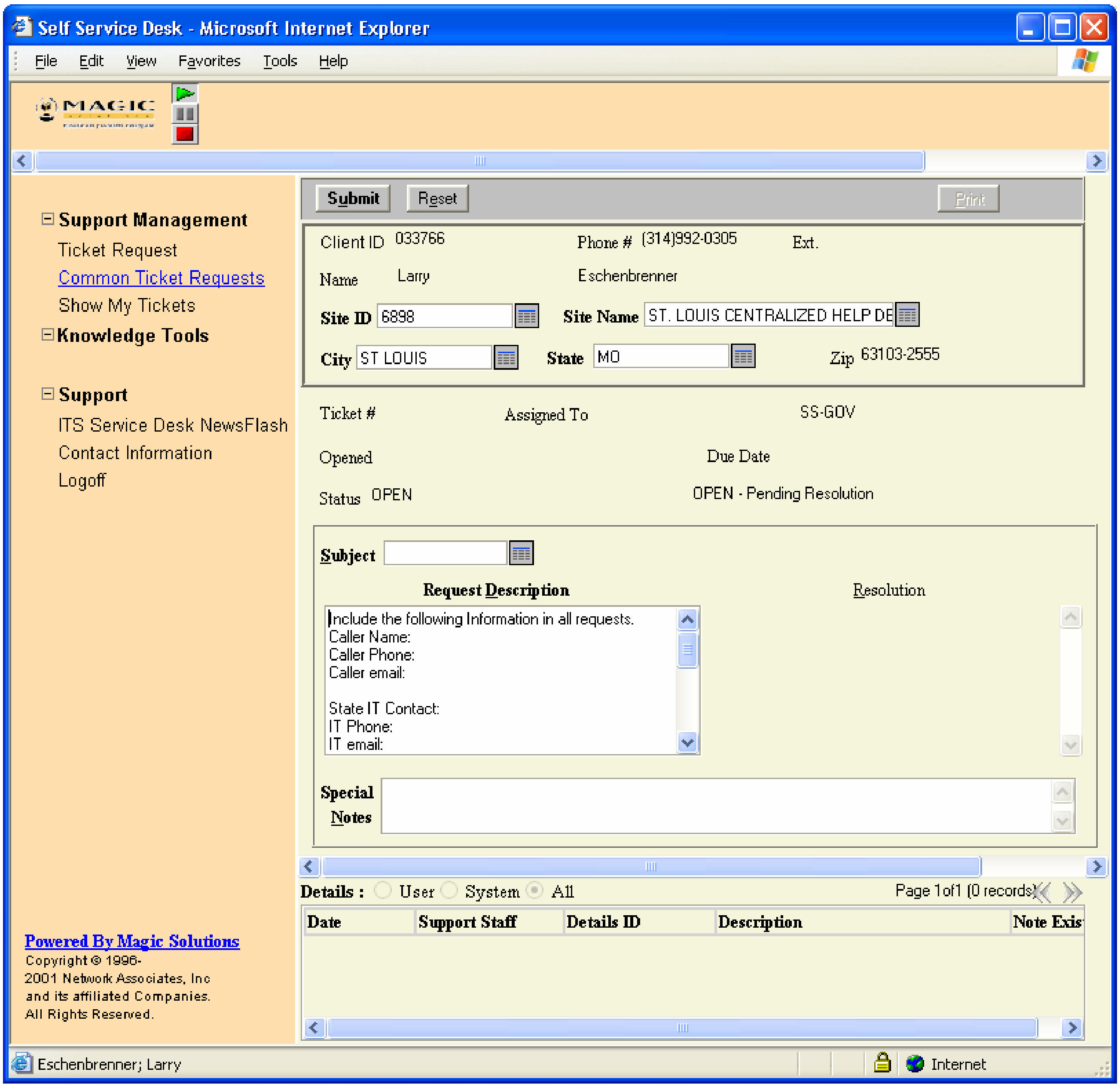
**Common Ticket Creation**

After selecting to create a new ticket from a Common Ticket option the procedure to finish and submit the ticket is the same as any other ticket – **EXCEPT** the Request Description will be partially filled in with a template that will guide you in providing all the required information. This not only provides a method to ensure that critical information is not forgotten but is submitted in a standard format.



Screen 31

In this example: Phone System/ Programming/ Repair/ Installation was selected.

The Subject will be “Network and Phone Problems”

The Request Description is pre-filled with the following items for the template:

Include the following Information in all requests.
Caller Name:
Caller Phone:
Caller email:

State IT Contact:
IT Phone:
IT email:

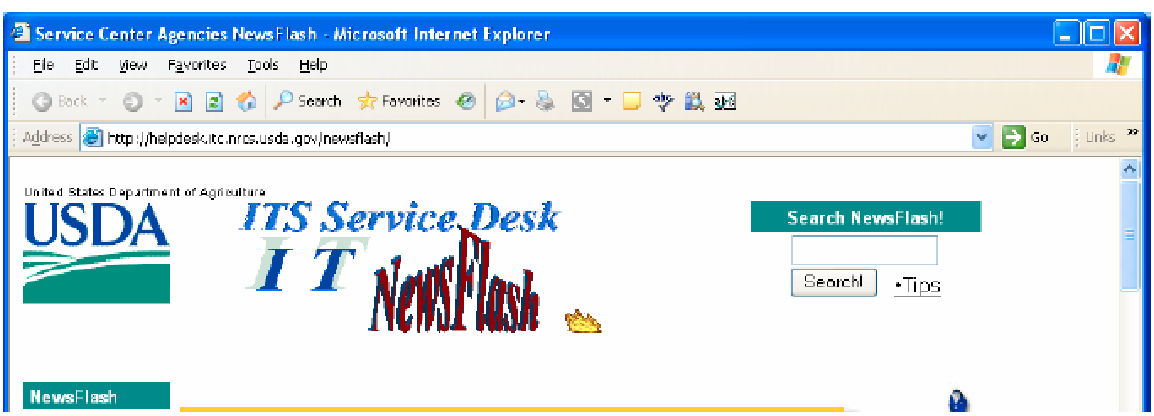
Site Contact Name:
Site Contact Phone:
Site Alt Contact:
Site Alt Phone
Site Name:
Site Address:
Site Phone:
Site OIP#:
Optional (Alt Contact)

Priority (Critical or Non-Critical)
Description of Problem or Requested Service

After each prompt enter the required information and click on the Submit button.

## ITS Service Desk NewsFlash

This option displays the ITS Service Desk NewsFlash Website.




Screen 32 – NewFlash Website.

This Site can also be used to open a second IE session without stopping the Self Service Session. Magic Solutions only allows one (1) internet session to be open at a time.

## Appendix A - Glossary of Terms and Abbreviations - Vendors

The Terms and Abbreviations used are NOT required, but only offered to provide some consistency in the description of problems and resolutions. When an abbreviation is used attempt to use the following to create a consistency in describing problems.
The vendors listed are most common Companies that provide hardware and software used in USDA field offices.

| Abbreviation | Company |
|---|---|
| Adobe | Adobe Acrobat |
| APC | American Power Conversion |
| BMC | BMC Software [Remedy/Magic Solutions] |
| BckPck | Microsolutions Systems (CD-ROM BackPack) |
| CAN | Canon Computer Systems, Inc. |
| CISCO | Cisco |
| CPQ | Compaq |
| CREAT | Creative Technologies |
| Crystal | Crystal Reports |
| DAE | Daewoo |
| EPS | Epson Printers |
| ESRI | ArcGIS, ArcView, MapShop |
| FUJ | Fujitsu |
| GCC | GCC Printers |
| GPS | Global Positioning System |
| GW | Gateway |
| HP | Hewlett-Packard |
| IBM | International Business Machines |
| KDS | KDS USA [Monitors] |
| KOD | Kodak Cameras |
| KYO | Kyocera |
| LEX | Lexmark Printers |
| Magic | Magic Solutions |
| MINO | Minolta |
| MSoft/MS | Microsoft |
| NEC | NEC Corporation |
| OLY | Olympus |
| OPTI | Optiquest |
| SONY | Sony |
| TEK | Tektronix |
| TI | Texas Instrument |
| VRTS | Veritas Software Corporation [Software] |
| VS | Viewsonic |
| XER | Xerox |

## APPENDIX B – Terminology/Component/Hardware/Software

The Terms and Abbreviations used are NOT required, but only offered to provide some consistency in the description of problems and resolutions. When an abbreviation is used attempt to use the following to create a consistency in describing problems.

The terminology and items listed are the most common items and activities that appear within Merlin system. The hardware components and software applications most commonly reported to the Service Desks. Items that do not appear within this list does not indicate that they can not be abbreviated within problem descriptions.

| Abbreviation | Terminology/Definition |
|---|---|
| Addr | Address |
| ACCTNT | Accounting |
| AD | Active Directory |
| ADMIN | Administrative |
| APPS | Applications |
| BTRY | Battery |
| CD-R | Compact Disc Recordable (Write Once Storage Media) |
| CD-ROM | Compact Disc Read Only Memory [Hardware] |
| CD-RW | Compact Disc Rewriteable (Read/Write Storage Media) |
| CLK/CLKG | Click or Clicking |
| CLU | Common Land Unit |
| COMM | Communications |
| COTS | Commercial Off The Self (Software) |
| CTR | Center |
| DC/WDC | District of Columbia/Washington DC |
| DHCP | Dynamic Host Configuration Protocol |
| DJ | DeskJet |
| DM | Data Mart |
| DNS | Domain Name System |
| DRV | Drive |
| DRVR | Driver [Software] |
| DS/PR | Docking Station/Port Replicator |
| DVD | Digital Video Disc |
| DVD-R | DVD Recordable (Write Once Media) |
| DVD-RW | DVD Disc Rewritable (Read/Write DVD Media) |
| DW | Data Warehouse |
| EMPL | Employee |
| EQUIP | Equipment |
| FAQ | Frequently Asked Questions |
| FIFO | First In First Out |
| FLASH | USB Flash Drive (Portable Media Device) see MEMSTK |
| FLASHMEM | Media Device (Camera/PDA/etc.) |
| FLPY | Floppy Drive |
| FP | FrontPage |
| FPNL | Flat Panel |
| FSCRN | Flat Screen |
| FTC | Fort Collins |
| FTP | File Transfer Protocol |
| GPS | Global Positioning System |
| GUI | Graphic User Interface |
| HDD | Hard Drive |
| HDWR/HW | Hardware |
| HP | Hewlett-Packard |
| HUB | HUB |
| ID | Identification |
| IE | Internet Explorer |
| IIS | Internet Information Server |
| IMAP | Internet Mail Access Protocol |
| INFO | Information |
| IP (Address) | Internet Protocol Address 255.255.255.255 |
| ISP | Internet Service Provider |

| Abbreviation | Terminology / Definition |
|---|---|
| IT | Information Terminology |
| KBD | Keyboard |
| KC | Kansas City |
| LIB | Library |
| LIFO | Last In First Out |
| LJ | LaserJet |
| LPT | Laptop |
| MBRD/MB | Motherboard |
| MEM | Memory |
| MEMCRD | Memory Card (Media Device) Camera |
| MEMSTK | Memory Stick (Media Device) Camera (see FLASHMEM) |
| MGMT | Management |
| MIC | Microphone |
| MISC | Miscellaneous |
| MNTR | Monitor |
| MSTR | Master |
| NIC | Network Interface Card |
| NS | Netscape |
| NT4 | Windows NT 4.0 |
| NW | Network |
| OS | Operating System |
| PC | Personal Computer |
| PDA | Personal Digital |
| PDF | Portable Document Format (viewed with Adobe Acrobat) |
| PHN | Telephone |
| PnP | Plug and Play |
| POP3 | Post Office Protocol 3 |
| PRNT | Print |
| PSWD | Password |
| PTR | Printer |
| PWRPT/PP | PowerPoint |
| RTR | Router |
| SCNR | Scanner |
| SCNR | Scanner |
| SCRN | Screen |
| SFTWR/SW | Software |
| SLA | Service Level Agreement |
| SMTP | Simple Mail Transfer Protocol |
| SPAM | Uninvited Email |
| ST | State |
| STL | St Louis |
| SVC | Service |
| SVR | Server |
| TDRV | Tape Drive |
| UPS | Uninterruptible Power Supply |
| USB | Universal Serial Bus |
| VIOP | Voice Over IP (IP Telephony) |
| VPN | Virtual Private Network |
| WF | Web Farm |
| Win2K/W2K | Windows 2000 |
| Win2K3/W2K3 | Windows 2003 |
| Win9x | Windows 95/98 |
| WinXP/XP | Windows XP Professional |
| WRKSTA | Workstation |
| XCHG | Exchange |

## APPENDIX C – APPLICATIONS and Office / Agency Acronyms

The common acronym and the name of common USDA programs and Applications used or serviced by USDA offices. The information here is provided for informational purposes.

| Abbreviation or Acronym | Application<br>Office Name (Description) |
|---|---|
| ACRES | Actual Cost Recovery Evaluation System |
| ADPS | Automated Discrepancy Processing System |
| AgLearn | Agriculture Learning Service |
| AMAS | Automated Multi-Housing Accounting System (RD Application) |
| AMLAP | American Indian Livestock Feed Program |
| APFO | Aerial Photography Field Office<br>The FSA office in Salt Lake City that creates and sells photographic products to Federal, State, and local governments; private industry; universities; and the public. Its primary responsibility is to provide FSA field offices with accurate aerial photographs used to view farmland and to measure acreage for compliance to farm program requirements. APFO is increasingly producing digital images. |
| ASU | Combined Administrative Management System Administrative Support Unit<br>The component of the Support Services Bureau that provides local support services to States and Unique Program Entities. Services include human resources, management services, civil rights, financial management, and information technology |
| CAIVERS | Credit Alert Interactive Voice Response (RD & FSA Applications) |
| CAMS | Combined Administrative Management System |
| CCC | Commodity Credit Corporation<br>A federally owned and operated entity created to stabilize, support, and protect farm income and prices. CCC also helps maintain balanced and adequate supplies of agricultural commodities and assists in their orderly distribution. |
| CCE | Common Computing Environment<br>A common information technology architecture built around common office automation tools, common telecommunications capabilities, common administrative applications, and a common IT support organization. CCE will furnish the primary tools for connecting and sharing information about customers and programs. |
| CCP | Command Center Plus |
| CDP | Crop Disaster Program |
| CEAP | Conservation Effects Assessment Project |
| CFP | Cattle Feed Program |
| CLDAP | Crop Loss Disaster Assistance Program |
| COPS | Cotton Online Processing System |
| COWFA | (FSA Application) |
| CP | Community Programs |
| CPIC | Capital Planning and Investment Control<br>A systematic approach to selecting, managing, and evaluating information technology investments. |
| CRIS | The Current Research Information System part of CSREES |
| CSREES | The Cooperative State Research, Education, and Extension Service an Agency of USDA |
| CRUISE | Cisco Router Upgrade Implementation Service |
| CSC | Centralized Servicing Center<br>The UPE in St. Louis responsible for processing direct housing loans nationwide.<br>Part of Rural Development's Rural Housing Service. |
| CST | Customer Service Toolkit |
| DLOS | Dedicated Loan Origination and Servicing System (RD Application) |
| DMLA | Dairy Market Loss Assistance Program |
| DP DAP | Dairy Production Disaster Assistance Program |
| EAS | Extensible Authorization System |
| EATS | Equipment Acquisition Tracking System |
| eFOTG | Electronic Field Office Technical Guide |
| EFT | Federal Assistance Award Data System Electronic Funds Transfer |
| FAAD | |
| FAS | Foreign Agricultural Service |
| FCP | Flood Compensation Program |
| FFAS | Farm and Foreign Agricultural Services<br>The mission area consisting of the following:<br>Farm Service Agency (FSA)<br>Foreign Agricultural Service (FAS)<br>Risk Management Agency (RMA) |
| FFIS | Foundation Financial Information System |

| Abbreviation or Acronym | Application<br>Office Name (Description) |
|---|---|
| FO | Finance Office |
| FOCUS | |
| FPDS | Federal Procurement Data System |
| FS | Forest Service |
| FSA | Farm Service Agency |
| FSFL | Farm Storage Facility Loan (FSA Application) |
| GLS | Guarantee Loan Systems (RD & FSA Distinct Applications) |
| GLS | Guaranteed Loan System |
| HomeSale | USDA Foreclosure Web Application |
| ICAMS | Internet Combined Administrative Management System |
| IBIL | Internet Billing System |
| KCCO | Kansas City Commodity Office<br>The component of the Farm Service Agency operations office that handles acquisition, procurement, storage, and distribution of commodities, and manages the U.S. Warehouse Act. |
| KCMO | Kansas City Management Office<br>An operational center in Kansas City that provides administrative support services to FSA, including the field offices, the Kansas City Commodity Office, and the Risk Management Agency. Services provided include information technology, human resources, management services, financial management, and civil rights. |
| LAP | Livestock Assistance Program |
| LCP | Livestock Compensation Program |
| LIP | Livestock Indemnity Program |
| MFIS | Multi-Family Information System (RD Application) |
| MILC | Milk Income Loss Contract |
| MINC | Management Agent Interactive NW Connection (RD Application) |
| MLA | Market Loss Assistance |
| MOM | Microsoft Operations Management |
| NAP | Non-Insured Assistance Program |
| NCAPS | Network Connection Architecture and Performance System |
| NCGC | National Cartographic and Geospatial Center<br>The mapping and spatial data center for NRCS. Located in Fort Worth, TX, it supports regional offices and States with services, products, and technical leadership in the areas of cartography, natural resources data access and distribution, and geospatial database development, and provides assistance in mapping, digitizing, and publishing soil surveys. |
| NFAC | National Food and Agriculture Council<br>The management entity designated by the Secretary of Agriculture to carry out USDA's field restructuring. NFAC consists of the administrators of all USDA agencies that are active at the State level. The position of "chairperson" rotates among the administrators of the Farm Service Agency, the Natural Resources Conservation Service, and Rural Development. |
| NITC | National Information Technology Center |
| NRCS | Natural Resources Conservation Service |
| NRE | Natural Resources and Environment<br>The mission area consisting of the following:<br>Forest Service (FS)<br>Natural Resources Conservation Service (NRCS) |
| OCIO | Office of the Chief Information Officer<br>The USDA's OCIO supervises and coordinates the design, acquisition, maintenance, use, and disposition of information and information technology (IT) by USDA agencies. |
| OIP | Office Information Profile |
| OTIS | Order Tracking Information System |
| PDP | Potato Deficiency Payments |
| PFCS | Program Funds Control System (RD Application) |
| PFCS | Program Funds Control System |
| PLAS | Program Loan Accounting System (RD Application) |
| POC | Point of Contact |
| PRS | Performance Results System |
| QLP | Quality Loss Payments |
| RBS | Rural Business-Cooperative Service |

| Abbreviation or Acronym | Application<br>Office Name (Description) |
|---|---|
| RD | Rural Development<br>The mission area consisting of the following:<br>Rural Business-Cooperative Service (RBS)<br>Rural Housing Service (RHS)<br>Rural Utilities Service (RUS) |
| RHS | Rural Housing Service |
| RM | Risk Management |
| RMA | Risk Management Agency |
| RUS | Rural Utility System (RD Application) |
| RUS | Rural Utilities Service (Agency) |
| SC | Service Center |
| SCIMS | |
| SCIT | Service Center Implementation Team<br>An interagency staff that supports the National Food and Agriculture Council (NFAC) and initiates activities and projects among the partner agencies to ensure the successful implementation of one-stop USDA service centers. |
| SCMTMS | Service Center Modernization Training Management System |
| SCORP | State Comprehensive Outdoor Recreation Plan |
| SLA | Service-Level Agreement<br>An agreement that specifies the individual services that will be provided, the cost allocation method that will be used, and how issues will be resolved. |
| SO | State Office |
| SPOC | System Point of Contact |
| StarWeb | System for Time and Attendance Reporting (web based) |
| TAP | Tree Assistance Program |
| TechPRS | Technical Progress Reporting System |
| TechPRS | Technical Progress Reporting System |
| Telecom | Telecommunications Services and Operations<br>Responsible for implementing, managing, and maintaining USDA Telecommunications Programs (Telecom) through the development, management, and implementation of Department wide telecommunications services and operations; for providing Department-wide telecommunications services and operations which facilitate the migration of existing USDA agencies' networks to a USDA corporate Enterprise Network; for leading the Department's effort to improve telecommunications services and reduce costs by evaluating and improving USDA telecommunication processes; and for implementing, managing, and maintaining USDA Telecommunications Network Security Program in concert with the USDA Information Technology Security Program through the development, management, and implementation of Department-wide network security services and operations. |
| TLAP | Tobacco Loss Assistance Program |
| TOPP | Tobacco Payment Program |
| T-OPS | Telecommunications Operations |
| UniFi/UNIFI | |
| UPE | Unique Program Entity<br>A customer unit or group of units located outside Washington, DC, that is not part of the Support Services Bureau but that requires the services of an Administrative Support Unit. |
| VO | Virtual Organization<br>An organization with many work sites but functioning as if it were a single, integrated unit operating from a single location (much like a USDA Service Desk). |
| WebCAAF | (Web based) Centralized Authentication and Authorization Facility |
| WLS | Workload Analysis |
| WTCAS | Web Total Cost Accounting System |

# APPENDIX D – Multiple New Individual Self Service Login Requests

*It is permissible for Supervisors/Group Leaders to request Logins to the Merlin SSHD application for multiple individuals via email. Include all requested Client information for each of the individual's, Step "2 and Step 5.a" and a summary for other information ("Step 3, Step 4 and Step 5.b") is allowed.*

1. New login requests for Clients may be directed to any of the respective Service Desks (Attn: Merlin Administrator) below, include all requested information for each of the individuals.

    1) SD-STL ServiceDesk-STL@stl.usda.gov Ageast (RD)
    2) SD-FTC ServiceDesk-FTC@ftc.usda.gov Agwest (NRCS)
    3) SD-KC ServiceDesk-KC@kcc.usda.gov Agcentral (FSA)

2. Provide the following information [Required for each individual]:
    a. Client Information
        1) First Name
        2) Middle Initial [Important if common name. See Note at bottom of section
        3) Last Name
        4) Phone Number and Ext, if any
        5) Employer
            (a) Agency [FSA, NRCS, RD, or OCIO]
            (b) Contractor [Company Name or Acronym]
            (c) Other Government User
        6) Nickname [Optional]
        7) Email Address

If Client is in system, Client ID will be the same as the CAMS ID without any alpha characters. For non-USDA employees the information above is required to create an ID in order to access Merlin SSHD. New USDA employee's that are requesting login and not yet in system, may be issued a temporary ID. See note at end of section.

3. The Support Information is used to identify what tickets a Self-Service customer can view.

    a. Support Information **[Optional]**
    Identify one of the following:
        1) Client data Only [Default]
        Can only view tickets in their name and no others.
        2) Company Data.
        Can view ALL tickets for the Site, regardless of who opened them.

| Option | Description |
|---|---|
| Access to Company records | Allows access to any records created by clients who share the same Company ID. This option is usually selected when the client is responsible for tracking ALL calls at a particular Company ID (Site). |
| Access to Department records | Allows access to the client's own records, and any records created by clients who share the same Company AND Department IDs. |
| Client Access Only (default) | Allows access to the client's own records only. This option is the DEFAULT unless Company access is requested. The client does not have a need to review ALL tickets associated with a Company ID (Site). |

4. The Site and Office Information is used to verify Client assigned to correct location within Merlin System. Note: Merlin data is acquired from CAMS and OIP data. If in error, the corrected data will be over-written with the next update from CAMS and/or OIP. **It is the individual's responsibility to contact their Human Resources Office and have information corrected.**

   a. Site Information
      1) Site ID
      2) Site Name
      3) Site Address
      4) Site City
      5) Site State
      6) Site Zip Code

   b. Office Information
      1) Office ID
      2) Office Name
      3) Office Phone and Extension
      4) Office Fax Number **[Optional]**

5. The Service Contact Information and Main Contact Information is used primarily by the Internal Service Desk Groups. These Groups (DC, STL, KC, FTC and some large office locations) support the personnel located in specific locations/buildings.
   **THIS INFORMATION IS NOT REQUIRED, UNLESS BEING SUPPORTED BY AN INTERNAL HELPDESK.**

   a. Service Contract Information
      1) Division
      2) Building
      3) Cubical/Post Number
      4) Type
      5) Urgency ID

   b. Main Contract Information
      1) Contract #
      2) Contract Expiration Date
      3) Main Contact (Supervisor)
      4) Main Contact Phone

Each individual will receive an email with the Merlin URL and thier new Login and Password.

Repeat this process for each client that requires access to the Self Service Help Desk application.
It is permissible for Supervisors/Group Leaders to request Logins to the Merlin SSHD application for multiple individuals via email.

New login requests for Clients may be directed to any of the respective Service Desks (Attn: Merlin Administrator) below, include all requested information for each of the individuals.

| | | |
|---|---|---|
| SD-STL | ServiceDesk-STL@stl.usda.gov | Ageast (RD) |
| SD-FTC | ServiceDesk-FTC@ftc.usda.gov | Agwest (NRCS) |
| SD-KC | ServiceDesk-KC@kcc.usda.gov | Agcentral (FSA) |

**Note**: Client ID – Information Only (Performed by Service Desk Staff)

**Temporary Client IDs**

If new federal employee or government contractor [non USDA employee] may have to create a temporary Client ID for the individual. Format – TMP<FirstInitial/Name>.<MI>.<LastName>. This will be made inactive after permanent Client ID in system from CAMS. Examples: TMPJOHN.Q.PUBLIC or TMPJQPUBLIC1

**Contractor Client IDs**

Contractor login is normally First Initial and Last Name, unless already exists in system. For common names may have login of First Initial, Middle Initial and Last Name.

If Jane Smith has login of JSMITH and Joseph E. Smith request login. Since JSMITH is being used, JESMITH would be assigned to Joseph as his login. If middle name unknown at time account setup may have numeral attached i.e. JSMITH2.

**PUBLIC User Client IDs**

PUBLIC users would only be issued a Self-Service logon, if anticipated as a repeat user or Vendor in some instances (if not member of a specific group). This would be authorized only in special circumstances and with USDA management approval.

# APPENDIX E – Sample New Self Service Account Email

The information here is provided for informational purposes.

```
(File Copy)

Hello Janet,

Your Merlin Login to Self Service has been Created.  To access Merlin Self Service go
to the following URL:

https://merlin.sc.egov.usda.gov/magicsshd/
and use:

Login: 012345

NOTE: The following password is case sensitive. You MUST type in EXACTLY as it is
specified.

Password: MerLin1234x

--------------------------------
To change your password:
1)Sign In
2)Click "Contact Information"
3)Erase the old password
4)Enter the new password
5)Click "Submit"
6)Enter password again in the pop up asking for confirmation
7)Click "OK"
8)Click "Submit"
--------------------------------

Thank You,
ITS Service Desk
Merlin Administration Group

      {Ref: {RULENAME}
```

I you do not receive this email within 24 hours of applying for Self Service login, email one of the Service Desks requesting that new login information be sent to you.