Toolkit Guide

Version 1.1

UDVIKLINGS OG FORENKLINGS STYRELSEN

Version control		
Version	Date	Change
1.0	08-01-2024	Initial version.
1.1	11-01-2024	

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Purpose of this document

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The purpose of this document is to guide economical operators on how to correctly use Toolkit while onboarding to ICS2 release 3 (maritime, road and rail) .

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2.1 .Introduction

This guide will examine what Toolkit is, where and how to gain access to it, as well as how to communicate with the ICS2 onboarding team.

2.1.1 Contact info

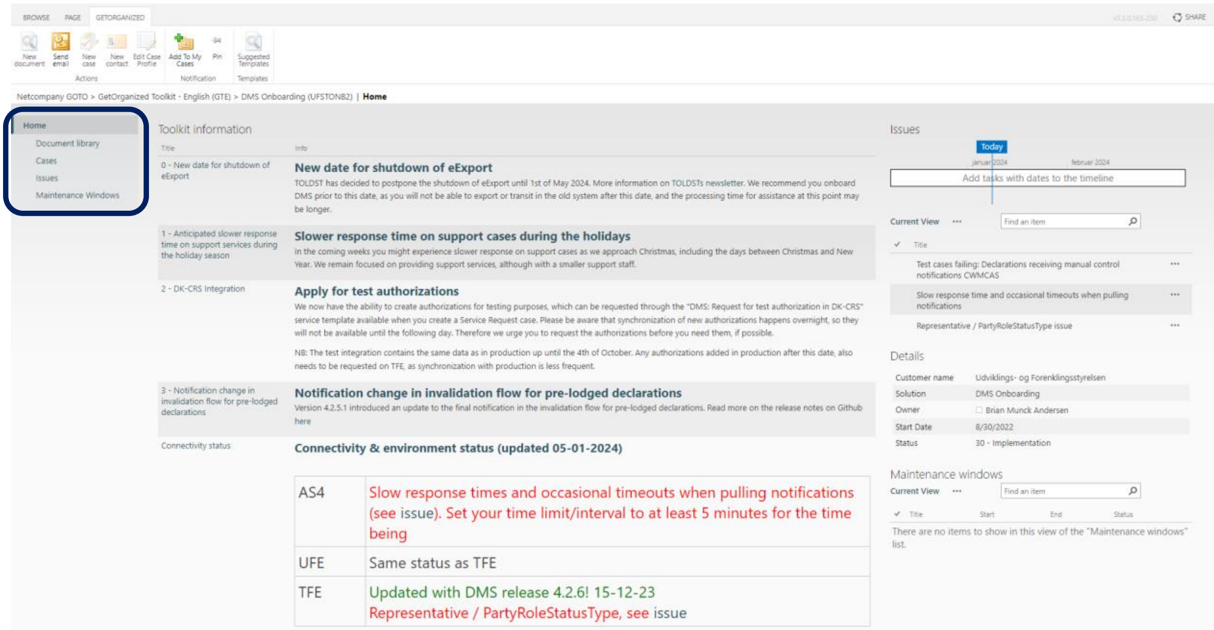
Toolkit is found here: https://goto.netcompany.com/cases/GTE1496/UFSTONB2/default.aspx

In case of problems with Toolkit, the onboarding team can be reached via email at: eutk.udvikling@ufst.dk

2.2.Toolkit Guide

As part of the onboarding process, one Toolkit user is created for each company.
An email will be sent out with instructions on how to create a password for the user. When logging on Toolkit, the user will be greeted by the landing page shown below.

This page contains a useful list of information, news, and updates. Be aware that this news can relate to either the DMS or ICS2 project respectively.



To the left you will find a quick menu from which you can access:

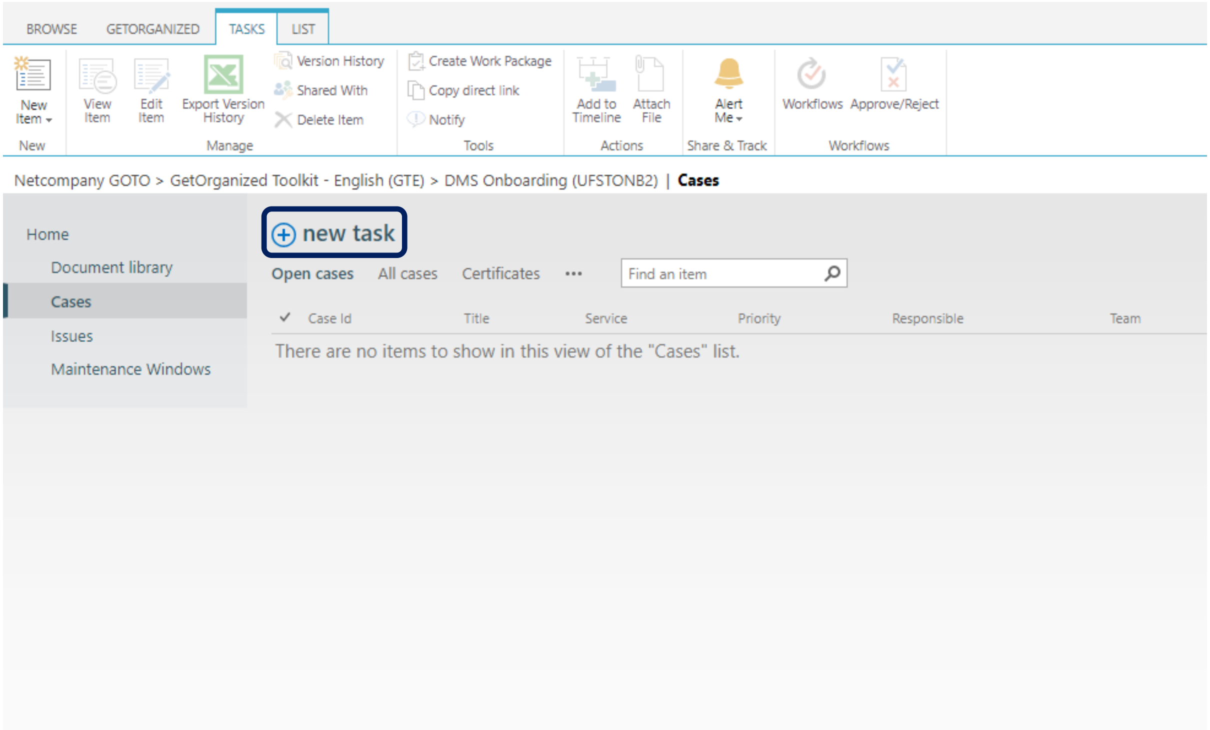
- Home – Landing page, seen above.
- Document library – There are currently no relevant documents for ICS2.
- Cases – Where you can find an overview of available cases.
- Issues & Maintenance Windows – related primarily to the DMS project and therefore not relevant to this guide.

2.3. Cases

On the ’Cases’ page, you will find an overview of current cases, as well as create new cases for the ICS2 onboarding team to handle.
This is the primary way to reach out to the ICS2 onboarding team for support. Once a case is created, it will be handled and updated by the team with available information and current status.

Below you can see a screenshot of the case overview. Every Toolkit user can see their own cases only, though the ICS2 onboarding team and Toldstyrelsen have access to all cases.

To create a new case, press the ⊕new task’ button in the upper lefthand corner - more about the new case creation in the next paragraph.

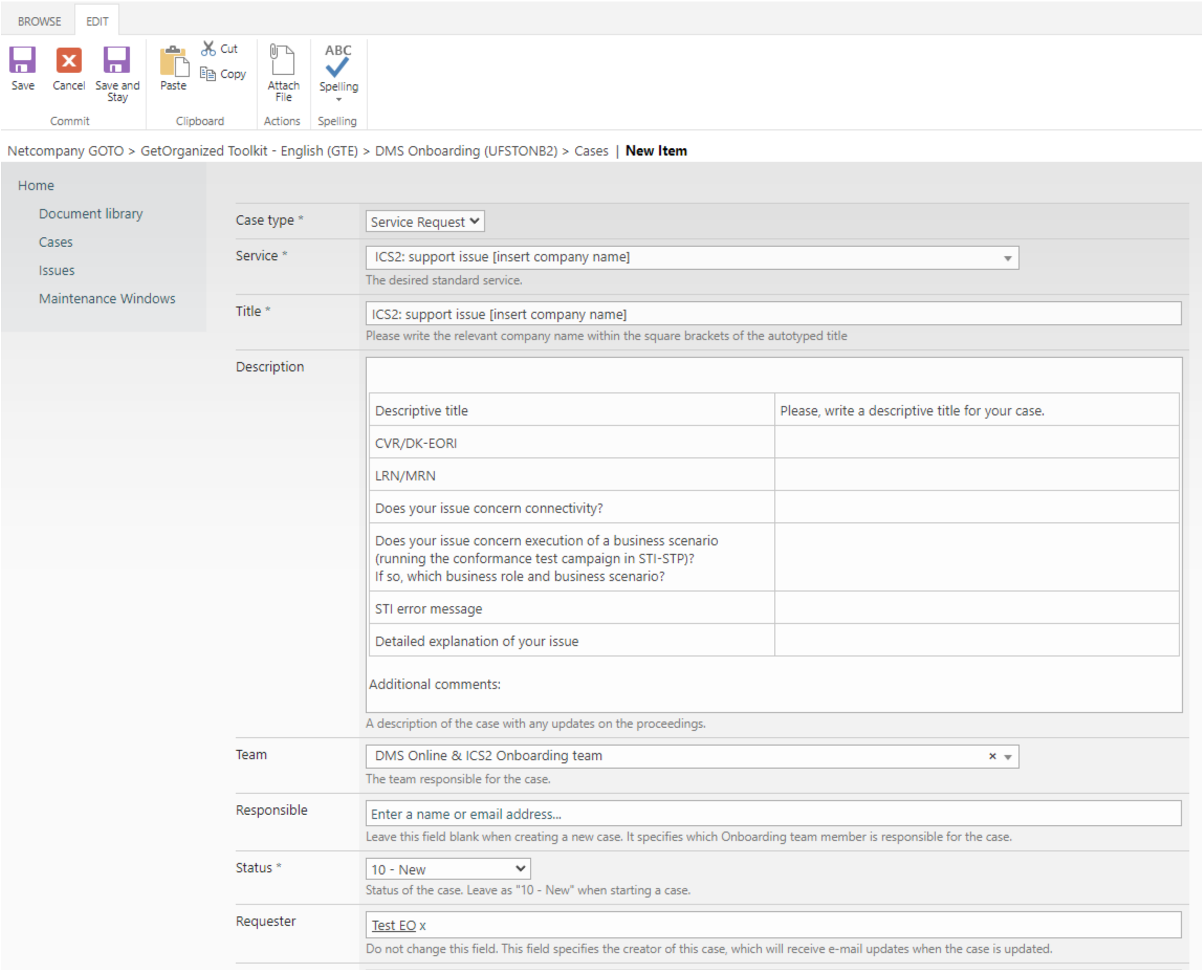


The case overview comes with several view options. The default setting is ‘Open cases’, which shows all cases that are not rejected or closed; however, it might be useful to access legacy support cases, which can be found by selecting ”All cases”.

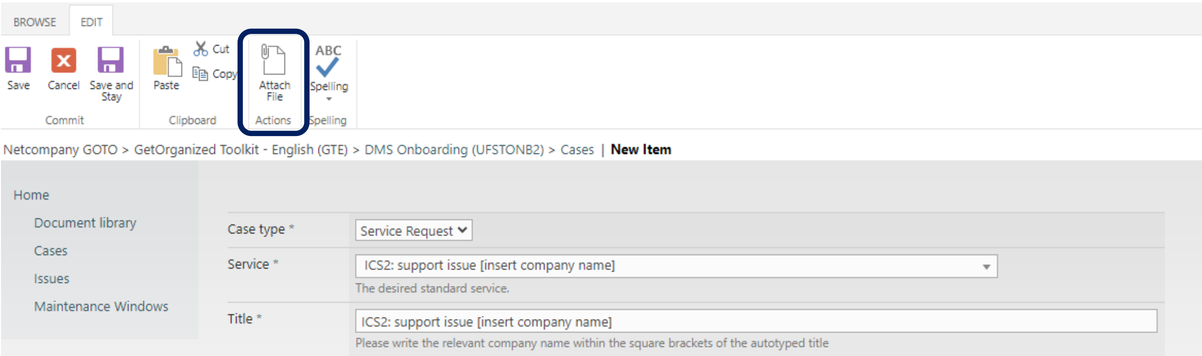
When a case is created, choose a 'service' through the drop-down menu. The only service relevant for ICS2 is 'ICS2: support issue [insert company name]'

The chosen service type determines fields and description.

Please replace [insert company name] with the company's actual name in the field 'Title'.



Files can be attached with the 'Attach File' button in the status line in the top panel.
Please attach any logs relevant to your case, e.g. test files.

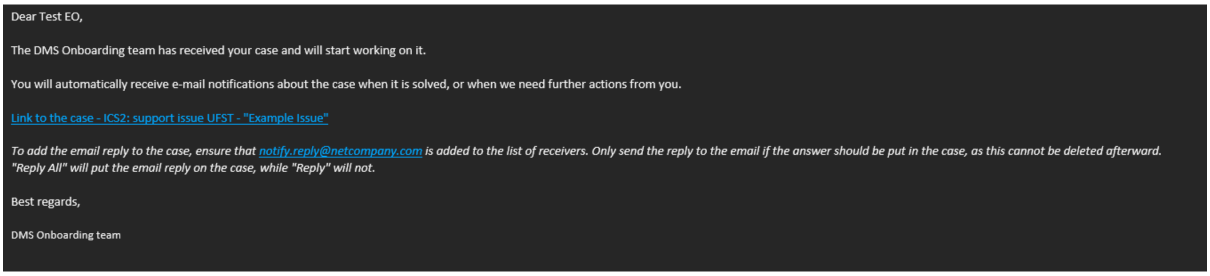


Below is a description of all available fields when creating a case. Any field not mentioned should be left as is.

Field	Description
Case type*	Choose 'Service Request'
Service*	Choose 'ICS2: support issue [insert company name]'
Title*	Is set automatically to the service chosen. Replace [insert company name] with actual company name
Description	Options are determined by the service chosen. For ICS2 support issues the following items are available: • CVR/DK-EORI • LRN/MRN • Does your issue concern connectivity? • Does your issue concern execution of a business scenario (running the conformance test campaign in STI-STP)? If so, which business role and business scenario? • STI error message • Detailed explanation of your issue
Related cases	Here you can link to other related cases.
Requester	Your username. Don't change this.
Contacts	Emails listed here will receive updates on the case as it progresses. Enter all emails of people who need to be updated on the case.
Responsible	Will be assigned to an UFST employee who will solve your case, leave blank upon creation.
Status	As your case is handled, it will change state. Please leave this at "10 – New" when creating the case. When you have received a response to your request but have added further questions on that case, then put the status back to "30 – Assigned". If the suggested solution did not work, please update status to "51 – Test not ok"

2.4. Creating a case

Upon creating a case, an email will be sent to the requester and all listed contacts containing a link to the case.



Dear Test EO,

The DMS Onboarding team has received your case and will start working on it.

You will automatically receive e-mail notifications about the case when it is solved, or when we need further actions from you.

Link to the case - ICS2: support issue UFST - "Example Issue"

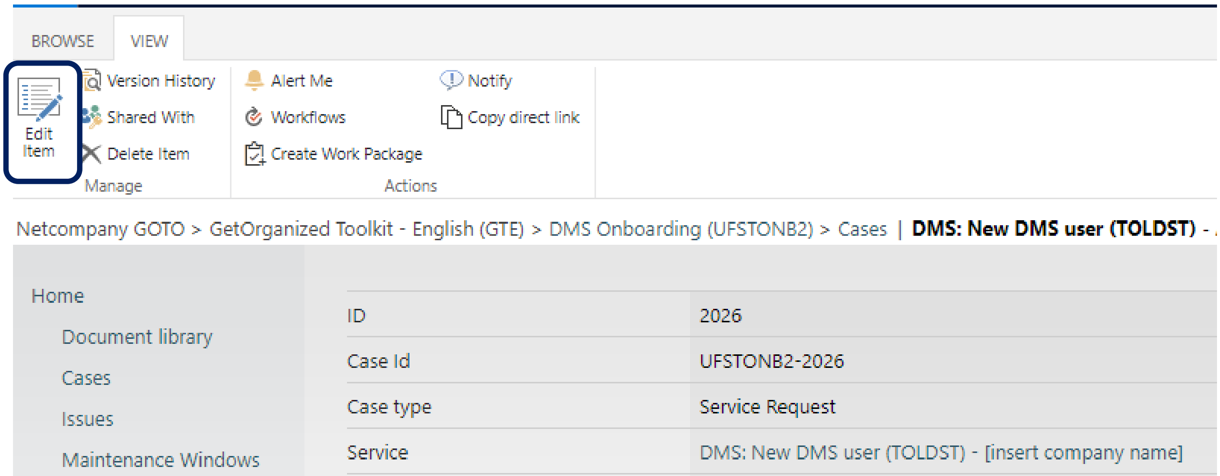
To add the email reply to the case, ensure that notify.reply@netcompany.com is added to the list of receivers. Only send the reply to the email if the answer should be put in the case, as this cannot be deleted afterward. "Reply All" will put the email reply on the case, while "Reply" will not.

Best regards,

DMS Onboarding team

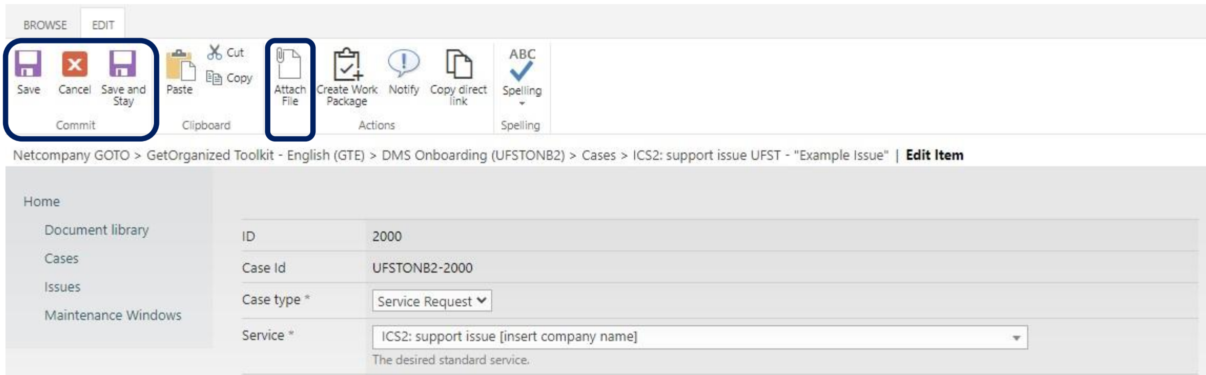
The case is now listed in the case overview.

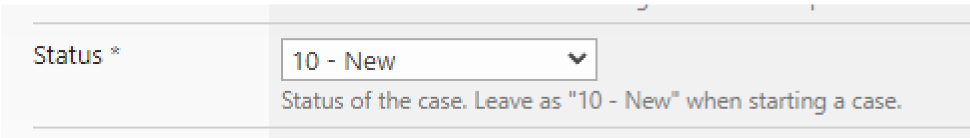
In the event that changes have to be made to the case, press the 'edit item' button in the top left of the case inspection view.



When editing the case, old information cannot be altered. Instead, a new description can be written, files can be attached, and a new status can be set.

Once the desired additions have been made, click either the 'Save' or 'Save and Stay' buttons. Both save the changes, but 'Save' sends the user back to the case overview, while 'Save and Stay' leaves the specific case open.





2.5. Case correspondence

Once the ICS2 onboarding team has processed a case, they will update it with either a request for more information or an answer for the economical operator, as well as an update to the status of the case. This will trigger an email notification to the economical operator:

Dear Test EO,

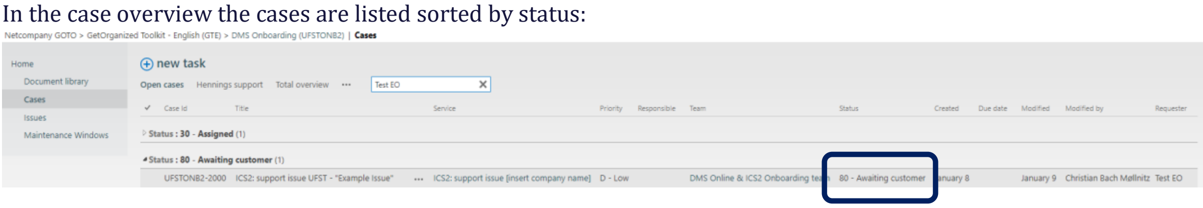
We need further information from you to be able to process your case further.

Click the link below to go to the case. The Description field should contain all information you need to progress.
When you have added the missing information, please set the status to 30 - Assigned, and we will continue solving the case.

Thanks in advance.

[Link to the case - ICS2: support issue UFST - "Example Issue"]

In the case overview the cases are listed sorted by status:



When responding to the case, be sure to set the correct status. In this case, the appropriate status after providing additional information would be 30 – Assigned (As stated in the email).

Here is a list of the available statuses and when they should be used.

Status	Description
10 – New	The case is new.
30 – Assigned	The case has been assigned to an ICS2 Onboarding team member
31 – Started	Processing of the case has started
40 – Migrated to test	The case has been moved to testing, performed by the customer
52 – Test not ok	The case has undergone testing, and the testing was not successful
80 – Awaiting customer	The case has been returned to the customer for clarification or additional information.
81 – Awaiting 3rd party	The case has been sent off to processing by a 3rd party, most usually EU customs service desk.
90 – Closed	The case is closed successfully.
91 – Rejected	The case was rejected with valid reason and is therefore closed.

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