

sunrun

IT Service Delivery Training

Learning Path - Courses - Modules



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Course: Welcome & Introduction

Module: Welcome

Welcome

Welcome to Sunrun's IT Service Delivery Team! We're glad you've chosen to join our amazing group of Tier 1 Service Desk agents. In this module, you'll hear from Sunrun's CEO, Mary Powell, who will introduce herself and offer a brief overview of what we do each day to achieve our mission "to create a planet run by the sun". You'll also meet one of our Tier 1 team leads who will share a few things you'll need to know to start your first day on the right foot.

Section 1 - Sunrun Overview

Tech Terms

- Knowledge Base Article (KBA)

Knowledge Base Articles

- Technology Operations Dashboard - October 2021

Videos

- [Welcome Video: Mary Powell, Sunrun CEO](#)
- [Welcome Video: PowerThrough](#)
- [Vivint Solar is now part of the Sunrun Family](#)

Infographics

- [Mary Powell, Incoming CEO](#)

Section 2 - Getting Started

Tech Terms

- Knowledge Base Article (KBA)
- Virtual Private Network (VPN)

Knowledge Base Articles

- [IT Service Desk Standards](#)

- [ITSD Master Reference](#)
- [Work From Home \(WFH\) - Requirements](#)
- [VPN \(Pulse Secure\) Connections & Basic Troubleshooting - Service Desk Guide](#)

Videos

- [Required Equipment](#)
- [Access Requests](#)
- [Typical Day](#)
- [Tier I Service Desk](#)
- [Tier II Service Desk](#)

Section 3 - ITSD Learning Path

Tech Terms

- IT Service Desk Agent
- Learning Management System (LMS)
- Learning Management System (LMS)
- Learning Portal (Litmos)
- Okta

Knowledge Base Articles

- [Learning Portal - Learner's Guide](#)
- [IT Service Delivery Training Outline](#)

Infographic

- [ITSD Training Plan](#)

Videos

- [ITSD LMS Learning Path Overview](#)

Course: Service Delivery Fundamentals

Welcome

IT Service Desk agents facilitate communication and collaboration between IT and other departments, helping to resolve and even avoid preventable glitches and breakdowns by helping you create, assign, track and resolve tickets. Sunrun's IT Service Desk is the primary point of contact between the organization and the technology it interacts with. It is the driving force enabling Sunrun to harness technological innovations to improve productivity and enable updated, usable and safe 21st-century workflows.

Module: Introduction to IT Service Delivery

Welcome

The IT service desk is the operating arm of Sunrun's IT department, designed to keep operations running smoothly. Sunrun's IT service desk handles everything from individual technical problems to total system outages, providing a single point of contact (SPOC) for IT users to seamlessly and efficiently interact with the Sunrun's IT department.

Section 1 - Service Desk Overview

Tech Terms

- Customer Satisfaction (CSAT) Survey
- Incident
- Incident Management Process (IMP)
- Internal Customer vs. External Customer
- IT Service Provider
- Knowledge Base
- Problem
- Problem Management
- Resolution & Recovery
- Service Level Agreement (SLA)

Knowledge Base Articles

- [Service Level Agreement \(SLA\) Matrix](#)

- [Priority - Impact & Urgency Matrix](#)
- [Customer Satisfaction \(CSAT\) Surveys - Service Delivery](#)

Videos

- [Defining Internal Customer Service](#)
- [Creating Positive Customer Interactions](#)
- [What Makes Service Desk Customer Service Unique](#)

Module: Engaging the Customer Experience

Welcome

For Sunrun's IT Service Delivery Team, customer experience (CX) refers to its agents' engagement with customers at every point of their IT experience. In large part, it's the sum total of all interactions a customer has with IT Service Delivery. At each touchpoint, service-level decisions directly impact the success of Sunrun employees.

Section 1 - Professional Opening

Tech Terms

- Customer Experience (CX)
- IT Service Desk Agent

Knowledge Base Articles

- Service Delivery: Engaging Customer Experience
- [How to Develop the Perfect Phone Greeting](#)

Videos

- [Contact Greeting and Validation](#)
- [Developing a Phone Greeting](#)

Assessment

1. A good greeting consists of three parts: a greeting, your name, and _____.
 - a. a scripted company tagline

- b. your role in the company
- c. an offer of assistance
- d. a marketing intro of the newest product

Section 2 - Confirming Contact Information

Welcome

One of the basic principles of providing Sunrun employees a secure IT system is to manage risk and protect sensitive information. The goal is to keep data private, unchanged and available. Private information can include personally identifiable information as well as business information, such as employee records. Keeping data secure is very challenging in today's digital world, as such, Sunrun's IT Service Desk agents work diligently every day to provide its customers the security they need for their personal information.

Tech Terms

- Customer Experience (CX)
- IT Service Desk Agent
- Login Credentials
- Offshore Employee
- Okta
- Onboarding/Offboarding
- Workday

Knowledge Base Articles

- Service Delivery: Engaging Customer Experience
- [Technology Support Employee Identity Verification Process](#)

Videos

- [Speak in Complete Sentences](#)

Assessment

1. Employee identity can be verified by confirming the following pieces of information:
 - a. Job Title
 - b. Manager's Name
 - c. Office Location
 - d. Employee badge/identification number
 - e. Employee Date of Birth
 - f. Ticket Number
 - g. Date of Hire
 - h. Business Hours
 - i. Workday Status
2. Which Sunrun applications manage all employee information used for identity verification?
 - a. Workday
 - b. Okta
 - c. Salesforce
 - d. ServiceNow
3. In which countries do Sunrun's offshore employees work?
 - a. Philippines
 - b. Columbia
 - c. India
 - d. Mexico
 - e. Canada
 - f. China
 - g. Spain
4. True or False: Login credentials are not to be provided to any employee other than the person for whom they are intended, with a few exceptions.
(True)

Section 3 - Acknowledging the Incident

Welcome

According to ITIL (IT Infrastructure library), “the incident management process ensures that normal service operation is restored as quickly as possible and the business impact is minimized.” Considering all the software services organizations rely on today, there are more potential failure points than ever, and the impact of an incident can be catastrophic. The key to incident management is having a good process and sticking to it, beginning with acknowledging the incident.

Tech Terms

- Customer Experience (CX)
- Incident
- IT Service Desk Agent
- Rapport

Knowledge Base Articles

- [Service Delivery - Engaging Customer Experience](#)

Videos

- [Building Rapport Over the Phone](#)
- [Control the Call with Friendliness](#)
- [Showing Empathy in Customer Service](#)

In-Call Recordings

- [Driving Safety - Huseen Sufi](#)

Assessment

1. The key components to choosing the right language and tone for effectively building phone support are positive tone, listening and following the customer, positive word choices, empathy and _____.
 - a. The customer perspective

- b. The DATE process
 - c. Escalation Procedures
 - d. Confirming questions
2. The benefits of showing empathy in customer service include:
- a. Diffusing a negative situation
 - b. Calming an upset customer
 - c. Showing that you're listening and understanding
 - d. All of the above
3. Which of the following is *not* a technique used to keep a call moving forward without making your customer feel rushed?
- a. Interrupt a customer if they're pressed for time.
 - b. Keep questions short and concise
 - c. Listen without interrupting
 - d. Focus on saving the customer time.
 - e. Don't engage in a long conversation.
 - f. Share information slowly.
 - g. Offer to send a follow-up email.

Module: Understanding the Incident

Welcome

Incident management is typically closely aligned with the service desk, which is the single point of contact for all users communicating with IT. When a service is disrupted or fails to deliver the promised performance during normal service hours, it is essential to understand the incident and restore the service to normal operation as quickly as possible. Any condition that has the potential to result in a breach or degradation of service ought to trigger a response that prevents the actual disruption from occurring. These are the objectives of incident management.

"Most people do not listen with the intent to understand; they listen with the intent to reply." ~ Stephen R. Covey

Active listening is listening with the intention of understanding others by using all your senses. It is not merely hearing what is said to make a response in the conversation. It requires effort and patience to develop those skills, and it could take a lifetime to do so.

There is a difference between listening and waiting your turn to speak. ~ Simon Sinek

Section 1 - Actively Listening

Tech Terms

- Customer Experience (CX)
- Incident
- Incident Management Process (IMP)
- Initial Diagnosis
- IT Service Desk Agent
- Pacing
- Resolution & Recovery
- Single Point of Contact (SPoC)

Knowledge Base Articles

- [Service Delivery: Understanding the Incident](#)

Videos

- [Communicating Effectively with Customers](#)
- [De-escalating Angry Calls](#)
- [Pacing Customers & Minimizing Jargon](#)

Assessment

1. _____ happens when you mirror the body language or verbal expression of another person as a way to build agreement and rapport.
 - a. Pacing
 - b. Paraphrasing
 - c. Clarifying
 - d. Redirecting

2. A _____ is one person or department that handles all requests and inquiries. They will be in charge of the day-to-day communication, management, and the rapid resolution of service requests and claims.
 - a. Single Point of Contact (SPoC)
 - b. Tier 1 Service Desk agent
 - c. Customer
 - d. Manager
3. As active listeners, Tier 1 Service Desk agents should use paraphrasing to summarize important points, demonstrate knowledge of the problem and _____.
 - a. Ensure customer confidence
 - b. Provide comprehensive details
 - c. End the call quickly
 - d. Submit tickets
4. For Sunrun's IT Service Delivery Team, _____ refers to its agents' engagement with customers at every point of their IT experience. In large part, it's the sum total of all interactions a customer has with IT Service Delivery. At each touchpoint, service-level decisions directly impact the success of Sunrun employees.
 - a. Customer Experience (CX)
 - b. Single Point of Contact (SPoC)
 - c. Resolution & Recovery
 - d. Pacing

Section 2 - Defining the Incident

Incident management is typically closely aligned with the service desk, which is the single point of contact for all users communicating with IT. When a service is disrupted or fails to deliver the promised performance during normal service hours, it is essential to understand the incident and restore the service to normal operation as quickly as possible.

*"We can not solve our problems with the same level of thinking that created them."
-- Albert Einstein*

Tech Terms

- Customer Experience (CX)
- Incident
- Impact
- Initial Diagnosis
- Incident Lifecycle
- Incident Management
- IT Service Desk Agent
- Priority
- Resolution & Recovery
- Urgency

Knowledge Base Articles

- [Service Delivery - Understanding the Incident](#)
- [Impact, Urgency & Priority - Understanding the Matrix](#)

Infographics

- [Priority: Urgency & Impact](#)
- [Incident Priority Definitions](#)
- [Incident Lifecycle](#)
- [Tiered Support Model](#)
- [Incident Resolution Path](#)

Videos

- [Defining the Incident](#)
- [Incident Priority](#)

Assessment

1. True or False: An incident management process (IMP) is a tool to provide resolution to the customer. (True)
2. True or False: The service desk is the sole owner of the incident management process (IMP). (False: The service desk is a major player in the incident management process (IMP), but by no means is it the sole player or owner.)
3. The purpose of incident management is _____.
 - a. To restore normal service operation as quickly as possible.
 - b. To create a service catalog of management strategies.
 - c. To develop and maintain knowledge management
 - d. To define urgency for the organization
4. _____ is central to the incident management process (IMP).
 - a. Customer Experience (CX)
 - b. Priority
 - c. Urgency
 - d. Resolution & Recovery
5. What of the following incident management elements does priority *not* measure?
 - a. Business impact
 - b. Number of users impacted
 - c. Business processes impacted
 - d. Knowledge Bases impacted
6. _____ is defined as unplanned interruptions or reductions in quality of IT services.
 - a. Incident Lifecycle
 - b. Incident Management
 - c. Customer Experience
 - d. Impact
7. In incident management, which two factors determine priority?

- a. Urgency & Impact
- b. Diagnosis & Resolution
- c. Time & Money
- d. Tone & Delivery

Module: Owning the Incident

Welcome

Incident management is not expected to perform root cause analysis to identify why an incident occurred. Rather, the focus is on doing whatever is necessary to restore the service. This often requires the use of a temporary fix, or workaround. Incidents interrupt normal service, such as when a user's computer breaks, when the VPN won't connect, or when the printer jams. These are unplanned events that require help from the IT Service Desk to own the incident and restore normal function.

Section 1 - Ensuring Customer Confidence

The key to any top-level help desk is to build trust and confidence in your customer base which in turn helps to establish credibility. By delivering consistent, quality customer service, your client base will trust you more and will use the help desk as a source for finding information and resolving issues. This helps the entire organization to leverage resources and in turn make more efficient use of everyone's time.

We spend a lot of time designing the bridge, but not enough time thinking about the people who are crossing it. Dr. Pabhjot Singh

Tech Terms

- Conflict Resolution
- Customer Experience (CX)
- Impact
- Incident
- Incident Category
- Investigation & Diagnosis
- IT Service Desk Agent
- Resolution & Recovery

Knowledge Base Articles

- [IT Service Delivery - Owning the Incident](#)

Effective customer service is focused more on mindset than actual knowledge. True, you need knowledge to resolve issues; however, the help desk is more about delivering an experience. The help desk should be a tool used by the organization to build solid and trustworthy relationships with its customers.

Videos

- [Building Rapport](#)
- [Customer Service Professionalism](#)
- [Create Personal Connections](#)
- [Closed Ended Questions](#)

Assessment

1. In IT service delivery, _____ happens when there's an agreed-upon action toward solving a shared problem.
 - a. **Conflict Resolution**
 - b. Resolution & Recovery
 - c. Incident Management
 - d. Investigation & Diagnosis
2. In the incident management process (IMP), _____ processes take place during troubleshooting when the initial incident hypothesis is confirmed as being correct.
 - a. Conflict Resolution
 - b. Resolution & Recovery
 - c. Incident Management
 - d. **Investigation & Diagnosis**
3. True or False: It is appropriate to inform customers that you are going to ask a series of close-ended questions before you start questioning. (**True.**)

4. Which type of question is appropriate to ensure the resolution has worked, or to make sure you have all of the facts before moving to a resolution?
- a. *Confirming Questions*
 - b. *Provocative Questions*
 - c. *Evaluative Questions*
 - d. *Closed Questions*
5. Which of the following is an example of an action verb you should utilize when asking closed-ended questions?
- a. Direct
 - b. Delete
 - c. When
 - d. *May*

Section 2 - Clarifying the Process

Tech Terms

- Customer Experience (CX)
- Dead Air
- Incident
- Incident Escalation
- Investigation & Diagnosis
- IT Service Desk Agent
- Resolution & Recovery
- Troubleshooting

Knowledge Base Articles

- [IT Service Delivery - Owning the Incident](#)
- [The Art of Troubleshooting](#)

Videos

- [Avoiding Dead Air](#)
- [Open Ended Questions](#)
- [Probing Questions](#)

Assessment

1. True or False: Probing questions can follow either an open-ended question or a closed-ended question. (True. Probing questions come after asking any other type of question.)
2. What do you call silent time that lasts for more than about 15 seconds?
 - a. Mute
 - b. Park
 - c. Dead Air
 - d. Hold
3. _____ is a logical, systematic search for the source of a problem in order to solve it and make the product or process operational again.
 - a. Troubleshooting
 - b. Dead Air
 - c. Incident Escalation
 - d. Investigation & Diagnosis
4. What would you AVOID in a moment of dead air on the call?
 - a. Use the time to gather more information about the customer.
 - b. Stay quiet to not burden the customer with unnecessary chatter.
 - c. Comment on something related to the customer's geographic area.
 - d. Explain to the customer what you are trying to do.

Section 3 - Acknowledging the Timeline

Time is a powerful factor in measuring customer service interaction quality for Sunrun's IT Service Desk agents. An answer to a question might be considered wonderful if it arrives within 30 seconds but disappointing if it arrives three days later. Sunrun employees are our

customers, and customer expectations drive their experiences. If you can exceed their expectations by getting back to them quickly, it reflects positively on your customer service and on Sunrun as a whole. If you are slower than anticipated, you're creating a negative experience. Timely, responsive customer service is central to delivering quality customer experiences.

Tech Terms

- Customer Experience (CX)
- Dead Air
- Incident
- Investigation & Diagnosis
- IT Service Desk Agent
- Troubleshooting

Knowledge Base Articles

- [IT Service Delivery - Owning the Incident](#)

Videos

- [Placing a Contact on Hold](#)
- [Providing Timelines - Hold DATE Process](#)

Assessment

1. What is the first step in placing a customer on hold?
 - a. inform and acknowledge
 - b. agree and confirm
 - c. describe and inform
 - d. tell and ask
2. True or False: You should use words like moment, brief, second, and jiffy when placing a customer on hold. (False: These words aren't specific timeframes. You need to use more specific terms like "one minute" or "two minutes.")

3. What is the maximum timeframe recommended for placing customers on hold?
- a. 1 minute
 - b. 2 minutes
 - c. 3 minutes
 - d. 4 minutes

Section 4 - Troubleshooting Proactively

Troubleshooting is an iterative, trial-and-error process that is repeated until the issue is fixed.

In order to troubleshoot effectively, it takes a healthy combination of curiosity, creativity, gumption, patience and knowledge. If you are missing any of those, you'll either become frustrated and give up or seriously break something.

Tech Terms

- Customer Experience (CX)
- Incident
- Investigation & Diagnosis
- IT Service Desk Agent
- Troubleshooting

Knowledge Base Articles

- [IT Service Delivery - Owning the Incident](#)

Infographic

- [Steps in a Troubleshooting Process](#)

Videos

- [Confirming Questions](#)
- [Diagnose Before You Prescribe](#)

Assessment

1. Which type of question is appropriate to ensure the resolution has worked, or to make sure you have all of the facts before moving to a resolution?
 - a. Confirming Questions
 - b. Provocative Questions
 - c. Evaluative Questions
 - d. Closed Questions
2. In the incident management process (IMP), _____ processes take place during troubleshooting when the initial incident hypothesis is confirmed as being correct.
 - a. Investigation & Diagnosis
 - b. Resolution & Recovery
 - c. Incident Escalation
 - d. Customer Experience (CX)

Module: Resolving the Incident

Welcome

Once an incident is understood and owned, the IT Service Desk can provide resolution, as well. Incident resolution involves diagnosis, investigation, escalation (if needed), recovery and closure upon confirmation that the customer's service has been restored to the required SLA level. Moreover, incident prioritization is important for SLA response adherence. An incident's priority is determined by its impact on users and on the business and its urgency. Urgency is how quickly a resolution is required; impact is the measure of the extent of potential damage the incident may cause.

Section 1 - Enlisting Resources

Sunrun employees use a number of different devices to access dozens of apps and programs throughout the day to do their jobs, including in-house software. That creates plenty of opportunity for technical issues. When employees have issues, Sunrun's IT Service Desk agents use an organized system to track and solve issues from various channels. Enlisting the resources in this organized system allows IT Service Desk agents to be effective at solving employee problems, which creates a better employee experience and ultimately supports the company's growth.

"I have not failed. I've just found 10,000 ways that won't work." ~Thomas Edison
"If your only tool is a hammer, then every problem looks like a nail." ~Abraham Maslow

Tech Terms

- Customer Experience (CX)
- Escalation
- Incident
- Incident Closure
- Investigation & Diagnosis
- IT Service Desk Agent
- Knowledge Base Article (KBA)
- Resolution & Recovery
- Troubleshooting

Knowledge Base Articles

- [IT Service Delivery: Resolving the Incident](#)

Videos

- [Escalation Procedures - Why?](#)
- [Troubleshooting & Diagnosing](#)

Assessment

1. True or False: One of the main responsibilities of a technician is to receive and resolve requests in a timely manner. (True)
2. _____ is defined as the ability to effectively diagnose a customer's issue and implement the most effective solution to resolve the issue.
 - a. Troubleshooting
 - b. Resolution & Recovery
 - c. Investigation & Diagnosis
 - d. IT Service Delivery

3. Which of the following *does not* describe an incident?
- a. a break fix issue
 - b. a failure in the infrastructure
 - c. an unplanned or unexpected failure in service
 - d. a resolution to a problem
4. A(n) _____ is the process of sending an issue to another resource for resolution.
- a. Escalation
 - b. Resolution & Recovery
 - c. Email
 - d. Investigation & Diagnosis
5. When you are unable to resolve a customer's issue due to lack of administrative rights, the incident will need to be sent to another group for resolution. What is this process called?
- a. Hold
 - b. Escalation
 - c. Transfer
 - d. Mute
6. When resolving an incident requires a subject matter expert with administrative rights, what type of escalation should be performed?
- a. Functional
 - b. Deferral
 - c. Approval
 - d. Hierarchical
7. When the customer insists on an escalation, demands to speak to a manager and/or won't cooperate with the Service Desk agent the call will need to engage a managerial resource to assist us with a customer. What type of escalation should be performed?
- a. Functional

- b. Deferral
- c. Approval
- d. Hierarchical

Section 2 - Guiding the Outcome

Effective incident management often requires a high level of collaboration within and between teams as this can facilitate information-sharing and learning, as well as helping to solve the incident more efficiently and effectively. There may also be a need for good collaboration tools so that people working on an incident can work together effectively. One technique that takes advantage of collaboration is termed swarming. This brings many different stakeholders together to work on the issue. Management of incidents may require frequent interaction with third party suppliers, and routine management of this aspect of supplier contracts is often part of the incident management practice.

"Do the best you can until you know better. Then when you know better, do better." ~Maya Angelou

"Starve your distractions, Feed your focus." ~Unknown

Tech Terms

- Customer Experience (CX)
- Escalation
- Incident
- Incident Closure
- Investigation & Diagnosis
- IT Service Desk Agent
- Knowledge Base Article (KBA)
- Resolution & Recovery
- Single Point of Contact (SPoC)
- Troubleshooting

Knowledge Base Articles

- [IT Service Delivery: Resolving the Incident](#)

Videos

- [First Contact Resolution](#)
- [Avoid Distractions](#)
- [Stay Focused While Working](#)
 - [Attitude Anchor Worksheet](#)

Assessment

1. True or False: There will be times when you just can't resolve the issue on first contact. (True: In technical support contact centers, some issues require more time to resolve and sometimes require an additional contact.)
2. Challenges to serving customers over the phone include emotional contagion, emotional labor and _____.
 - a. Directed attention fatigue
 - b. Attitude Anchors
 - c. Maintenance Anchors
 - d. Repair Fatigue
3. Which of the following is *not* a technique to avoid distractions and focus on customer service?
 - a. Imagine you're having a face-to-face conversation with a customer.
 - b. Take a break.
 - c. Identify distractions that can be eliminated or reduced.
 - d. Transfer the call to another Service Desk agent.
4. _____ is resolving a customer's question or issue the first time they contact the Service Desk.
 - a. First-contact Resolution
 - b. Quality Contact
 - c. Minimum Wait Times

d. Great Service

Section 3 - Implementing a Resolution

At Sunrun, effective incident management requires that IT Service Desk agents and other people working on an incident provide good-quality updates in a timely fashion. These updates should include information about symptoms, business impact, CIs affected, actions completed, and actions planned. Each of these should have a timestamp and information about the people involved, so that the people involved or interested can be kept informed. Without adequate communication, users and other stakeholders may become frustrated, leading to overwhelmed service desk agents and dissatisfaction with overall service delivery.

In incident management, the goal is to handle the situation in a way that limits damage and reduces recovery time and costs.

Tech Terms

- Customer Experience (CX)
- Escalation
- Incident
- Incident Closure
- Investigation & Diagnosis
- IT Service Desk Agent
- Knowledge Base Article (KBA)
- Resolution & Recovery
- Single Point of Contact (SPoC)
- Troubleshooting

Knowledge Base Articles

- [IT Service Delivery: Resolving the Incident](#)

Videos

- [Contact Resolution](#)

- [Contact Closure](#)

Assessment

1. True or False: The first step in resolution is to leverage and use your resources. (True)
2. True or False: The first step in closure is to ensure that all documentation is complete and up to date. (True)
3. _____ is one of the four components of a customer interaction.
 - a. Escalation
 - b. Closure
 - c. Prioritization
 - d. Categorization
 - Closure is the main component. The others answers are simply tasks that are performed.

Course: Identity & Access Management

Welcome

In this module, you'll learn more about Identity & Access Management (IAM), a framework of policies used to ensure that the right users have the appropriate access to technology resources. IAM systems identify, authenticate and control access for individuals who will be utilizing Sunrun's IT resources, and they also outline applications employees need to access.

Module: Okta

Welcome

In this module, you'll learn more about Okta, Sunrun's single sign-on (SSO) platform that all employees use to access cloud-based applications. Administrators also use Okta to support employees with identity and access management (IAM).

Section 1 - Okta Admin

In this module, you'll learn more about Okta, Sunrun's single sign-on (SSO) platform that all employees use to access cloud-based applications. Administrators also use Okta to support employees with identity and access management (IAM). The Okta Administrator Dashboard summarizes org usage and activity and notifies you of any problems or outstanding work to be completed. The navigation panel on the side provides shortcuts to the most commonly performed tasks. You can use the Admin Dashboard as a map of the Admin Console and as an index of administrative best practices.

Tech Terms

- Okta
- Multi-factor Authentication (MFA)
- Knowledge Base Article (KBA)
- Knowledge Blocks
- Active Directory (AD)
- Identity Access Management (IAM)
- Runbook

Knowledge Base Articles

- [Runbook: Okta - Identity & Access Management](#)
- [Okta Admin Guide](#)
- [Account Unlock, Password & MFA Reset Policy](#)
- [Technology Support Employee Identity Verification Process](#)

Videos

- Okta Account Unlock, Password & MFA Reset
 - Role Play: [Okta Password Change w/Steph & Wes](#)
 - Overview: [Okta Dashboard w/Bre](#)
 - Procedures: [Identity Verification w/Bre](#)

In-Call Videos/Recordings

- [Okta Account Expired - Scott Cooley](#)
- [Okta Password Expired - Scott Cooley_2021-07-07 - INC0396806.pdf](#)

Tier 1 Information - Okta

Escalation: Tier II Service Desk

Subject Matter Expert (SME): Chris Prior, Dave Carroll, Stanley Loper

Slack Channel: TO-core-apps

Notes:

- Okta Landing Page Updates
 - -TechOps update on 10/4
 - -Company-wide update on 10/14
- Tier 1 Troubleshooting Steps:
 - Why can't this user login?
 - Main Issues:
 - Data security lockout
 - LOA hold on account
 - Pre-ET or ET hold on account
 - Equipment lockout
 - To troubleshoot the main user issues:
 - Open Okta Admin
 - Open the Groups tab
 - Search for the customer's profile
 - Find the customer's user group, typically located at the bottom.
 - If the customer is a member of groups, contact Tier 1 Team Leads or the appropriate department to resolve the issue

Assessment(s)

1. In multi-factor authentication (MFA), what are the three types of evidence (or factors) that a user can present to grant access to a website or application?
 - a. Knowledge, possession, inherence
 - b. Job title, password, date of birth
 - c. IP address, phone number, badge ID
 - d. Authentication, evidence, third party access
2. What is another name for **multi-factor authentication (MFA)**?
 - a. MFA
 - b. Two-factor authentication
 - c. 2FA
 - d. All of the above
3. Which feature listed below does Okta *not* provide?
 - a. Single Sign-On (SSO)
 - b. Active Directory (AD) integration
 - c. Centralized deprovisioning of users
 - d. Multi-factor authentication (MFA)
 - e. Mobile identity management
 - f. Remote Desktop Management
4. True or False: Okta is an identity management service built only for the cloud and does not, therefore, provide compatibility with on-premises applications.
 - a. True
 - b. False (*Okta is an identity management service built for the cloud but compatible with many on-premises applications. With Okta, IT can manage any employee's access to any application or device.*)
5. For which of the following does Okta manage an employee's access?
 - a. Applications
 - b. Devices

- c. Office Buildings
 - d. All of the above
6. When looking at a user's profile record in Okta, what three categories of information can a Tier 1 Service Desk agent access?
- a. Applications
 - b. Groups
 - c. Profile
 - d. Security Questions
 - e. Payroll
7. When resetting a user's password in Okta, which option should you select in the 'Reset Password' window?
- a. Reset Password Link
 - b. Temporary Password
8. With whom can an employee's login credentials be shared?
- a. The employee only
 - b. The employee and the employee's manager
 - c. The employee, the employee's manager and the employee's direct report(s)
9. Before completing any account access-related actions, what three things should the Tier 1 Service Desk agent verify?
- a. Employee's office location
 - b. Employee's manager
 - c. Employee's position
 - d. Employee's office phone number
 - e. Employee's start date
10. If an employee is unable to answer the standard identity verification questions, what other information can be accepted as verification?
- a. Employee's badge/identification number
 - b. Employee's date of birth

- c. Employee's social security number
 - d. Employee's home address
11. What are the only reasons that user accounts might be unlocked in Active Directory (AD)?
- a. If the employee's VPN connection is disabled
 - b. If the employee's computer login is not working
 - c. If the employee submits a self-service request
 - d. If the employee's manager submits a request on the employee's behalf
12. What application should be used to reset user passwords?
- a. Workday
 - b. Okta
 - c. InContact
 - d. Salesforce
13. Where should a Tier 1 Service Desk agent direct an employee who requests access to disabled applications while on Leave of Absence (LoA)?
- a. Okta
 - b. Workday
 - c. leaves@sunrun.com
 - d. Tier II Service Desk
 - e. Human Resources

Section 2 - Okta Dashboard

Okta is the front door to all your applications. Once you're in, you'll see a custom dashboard tailored to have all the applications IT has assigned to you. Click on one and you're automatically logged in. No need to re-enter any credentials. Your Okta dashboard is unique to you. You can reorder your applications to fit your work style, dragging them around and putting them in separate sections, or let Okta dynamically reorder them based on your most frequently used apps.

Tech Terms

- Account Access
- MyApps
- Okta Dashboard
- Single Sign-On (SSO)
- Short Message Service (SMS)
- Security Questions

Knowledge Base Articles

- [MyApps Single Sign-On \(SSO\) - OKTA Verify Setup Guide](#)
- [MyApps Single Sign-On \(SSO\) - Password Reset & Account Unlock Instructions](#)
- [MyApps Single Sign-On \(SSO\) - Update your Security Question](#)
- [MyApps Single Sign-On \(SSO\) - Update Text Verification \(SMS\) Phone Number](#)
- [Windows & Single Sign-On Password Sync Process](#)

Videos

- [Okta Dashboard w/Bre](#)

In-Call Recording

- [Windows & Single Sign-On Password Sync](#)

Tier 1 Information - Okta

Escalation: Tier II Service Desk

Subject Matter Expert (SME): Chris Prior, Dave Carroll, Stanley Loper

Chat: IT Service Desk

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Assessment(s)

1. Where are account access status updates pushed first?
 - a. Okta
 - b. Salesforce
 - c. Active Directory (AD)
 - d. Workday
 - e. InContact

- f. All of the above
- 2. From there, where do account access status updates flow downstream?
 - a. Okta
 - b. Salesforce
 - c. Active Directory (AD)
 - d. Workday
 - e. InContact
 - f. All of the above
- 3. Which platform offers secure access to a user's enterprise applications and information?
 - a. Okta
 - b. Salesforce
 - c. Active Directory (AD)
 - d. Workday
 - e. InContact
 - f. All of the above
- 4. What is another name for Single Sign-On (SSO)?
 - a. Modern Authentication
 - b. Dashboard Admin
 - c. Active Directory (AD) Management
 - d. Azure Active Directory
- 5. What is the purpose of a security question?
 - a. Self-service password reset
 - b. A shared secret used as an authenticator
 - c. Cost reduction for IT Help Desk
 - d. All of the above
- 6. Which of the following is *not* a requirement for a new password?
 - a. At least 8 characters
 - b. A lowercase letter

- c. An uppercase letter
 - d. A number
 - e. Must not contain any part of your username
 - f. Cannot be a recently used password
 - g. Your employee number
7. For which of the reasons below might a user become locked out of his/her account?
- a. Entering a password incorrectly multiple times
 - b. Password is more than 90 days old
 - c. Someone other than the user attempted to log into the account
 - d. All of the above
8. For security and convenience, where should Sunrun employees first attempt to unlock their own account and/or reset their own password?
- a. Okta
 - b. Salesforce
 - c. Active Directory (AD)
 - d. Workday
 - e. InContact

Tier 1 Information - Okta

Escalation: Tier II Service Desk

Subject Matter Expert (SME): Chris Prior, Dave Carroll, Stanley Loper

Chat: IT Service Desk

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Section 3 - Okta Procedures

Tech Terms

- Google Authenticator (MFA)
- Multi-factor Authentication
- Okta Admin Dashboard
- Okta Verify
- Okta Verify with Push

Knowledge Base Articles

- [Sunrun Okta Setup Instructions](#)
- [User Passwords / MFA / Computer Passwords](#)
- [How to Login to Okta](#)
- [Terminating Employees in Okta](#)
- [Okta Verify and Google Authentication MFA Setup](#)

Videos

- [Okta Verify - Ticket on Hold for Verification](#)
- [Okta Verify - When Service Desk Call is Required](#)
- [Okta Admin - Can't Verify User](#)

In-Call Recordings

- [Google Authenticator Support - Scott Cooley](#)
- [Okta MFA Reset & Biometric Scan - Wesley Short](#)
- [Google Authenticator Support - Keldon Lopez](#)

Tier 1 Information - Okta

Escalation: Tier II Service Desk

Subject Matter Expert (SME): Chris Prior, Dave Carroll, Stanley Loper

Chat: IT Service Desk

Notes:

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Assessment(s)

1. After an end user installs **Okta Verify** on their primary device, they can verify their identity by what two methods?
 - a. by approving a push notification
 - b. by entering a one-time code
 - c. by entering a time-based six-digit code
 - d. with a retina scan
 - e. with a fingerprint scan
 - f. none of the above
2. When Google Authenticator is enabled as a factor, by what means does the user authenticate his/her identity?
 - a. by approving a push notification
 - b. by entering a one-time code
 - c. by entering a time-based six-digit code
 - d. with a retina scan
 - e. with a fingerprint scan
 - f. none of the above
3. Which URL will direct a user to Sunrun's Okta login screen?
 - a. <https://sunrun.okta.com>
 - b. <https://vivintsolar.okta.com>
 - c. <https://okta.sunrun.com>
 - d. <https://okta.vivintsolar.com>

- e. None of the above
- 4. True or False: When an employee is terminated, all necessary account deprovisioning processes are automatically applied. **(False)**
- 5. If an employee submits a self-service request with a personal email account, and his/her identity cannot be verified, how should the Tier 1 Service Desk agent proceed with the request?
 - a. **Send the employee an email asking him/her to call the Service Desk to provide identity verification.**
 - b. Call the employee at the best known number.
 - c. Email the employee with a request for verification.
 - d. Escalate the ticket to Tier II Service Desk.
 - e. Close the ticket.

Module: Active Directory

Welcome

In this module, you'll learn about Active Directory (AD), a windows directory service that is utilized to disable/enable/unlock accounts, change passwords and verify information.

Section 1 - Active Directory

Tech Terms

- Active Directory (AD)
- Active Directory Domain Services (AD DS)
- Direct Password Resets
- Identity and Access Management (IAM)
- Knowledge Base Article (KBA)
- Local Administrator Password Solutions (LAPS)
- Okta
- Unlocking Accounts

Knowledge Base Articles

- [Active Directory Administration Guide](#)
- [Active Directory - Cross-Organizational Access](#)
- [Local Administrator Password Solutions \(LAPS\) Use Guide](#)
- [How to find AD Lockout Reason](#)

Videos

- [How to Change a Password in Active Directory \(AD\)](#)

In-Call Videos/Recordings

- [Active Directory \(AD\) Locked Out - Zachary Beason](#)
- [Active Directory \(AD\) Unlock for Device Access - Wesley Short](#)

Tier 1 Information - Active Directory

Escalation: IT-Site Support

Subject Matter Expert (SME): Szymon Orwayl, Chris Prior, Tier 1 Team Leads, IT Service Desk Managers, Networking

Chat: IT Service Desk

Notes:

- N/A

Assessment(s)

1. Why would you need to use Active Directory (AD) to change a user's password manually?
 - a. The user's password isn't pushing from Okta to AD.
 - b. The user's password needs to be changed/reset directly in AD.
 - c. Both.
2. Sort the following steps in the correct order to change/reset a user's password.

- a. Open Active Directory Users & Computers (ADUC) management console.
 - b. Select 'Find objects in Active Directory Domain Services (AD DS)'.
 - c. Look up user.
 - d. Double click the user/object to open properties.
 - e. Right click user's name, and select 'Reset Password'.
 - f. Set the new password and confirm.
 - g. Uncheck box next to 'User must change password at next logon'.
 - h. If user's account is locked, check the box next to 'Unlock the user's account'.
 - i. Ask the user to try logging in with the new password.
3. True or False: You can open Active Directory (AD) with both your personal account and an Admin account. (False)
4. In which Organizational Unit (OU) can all active user accounts be found?
- a. Disabled OU
 - b. Machines OU
 - c. People OU
5. When searching for a user account in Active Directory (AD), which of the following is a best practice?
- a. Search the entire directory for the user account.
 - b. Use AD's voice-activated feature to search for the user account.
 - c. Open each Organizational Unit (OU) individually to search for the user account.
6. Before unlocking a user account in Active Directory (AD), which policy must first be followed?
- a. Local Administrator Password Solutions (LAPS) Compliance Policy
 - b. Account Unlock, Password & MFA Reset Policy
 - c. Direct Reports Policy

7. You are a Sunrun (Blue) IT Service Desk agent attempting to access the Vivint (Orange) Active Directory (AD) for user account and device management. Sort the steps below in the order you'll need to follow to complete the task successfully.
- Connect to VPN via Pulse Secure.
 - Right click 'Users and Computers', and select 'Run as a different user'.
 - Enter 'gosolarit.com\firstname.lastname', and enter your Okta password.
 - In the left pane, right click 'sunrun.global', and select 'Change Domain'.
8. You are a Sunrun (Blue) IT Service Desk agent attempting to access the Vivint (Orange) Active Directory (AD) for user account and device management. Match the steps in the first column with the actions in the second column needed to complete the task successfully.
- Step 1 - Connect to VPN via Pulse Secure.
 - Step 2 - Right click 'Users and Computers', and select 'Run as a different user'.
 - Step 3 - Enter 'gosolarit.com\firstname.lastname', and enter your Okta password.
 - Step 4 -In the left pane, right click 'sunrun.global', and select 'Change Domain'.
 - Step 5 -Enter 'gosolarit.com', and select 'OK'.
9. True or False: Local Administrator Password Solutions (LAPS) compliance is ensured through the use of Active Directory Group Policy (GPO) at the OU Level. (True)

Course: Environment Infrastructure

Module: Development & Operations

Welcome

The scope of Technology and operation management has evolved over a period of time and has moved from development of products into design, management and improvement of operating system and processes. Use of technology in operation management has ensured that organizations are able to reduce the cost, improve the delivery process, standardize and improve quality and focus on customization. Sunrun's IT Service Delivery Team works on the frontlines of that evolution while simultaneously supporting every layer of Sunrun's product development and business operations.

Section 1 - Amazon Web Services (AWS)

Tech Terms

- Amazon Web Services (AWS)
- Amazon Workspaces
- Client
- Google Chrome
- Okta
- Virtual Machine (VM)

Knowledge Base Articles

- [Technology Authentication Integrations Diagram](#)
- [Amazon Workspaces - Using AWS](#)
- [Amazon Workspaces - Set-up](#)

Infographic

- [Technology Authentication Integrations Diagram](#)

Videos

- [What is Amazon Web Services \(AWS\)?](#)

- [Introduction to Amazon WorkSpaces](#)
- [Amazon Web Services \(AWS\) at Sunrun](#)

Tier 1 Information - Amazon Web Services (AWS)

Escalation: Tier 1 Manager or Steve Cole

Subject Matter Expert (SME): Steve Cole

Chat: N/A

Notes: Tier 1 Service Desk Agents don't have access to Slack or Amazon Web Services (AWS)

Assessment

1. From which platform are Sunrun's virtual machines deployed and maintained?
 - a. Google Cloud Platform
 - b. Azure
 - c. **Amazon Web Services (AWS)**
 - d. Citrix Hypervisor
 - e. VirtualBox
2. Which Desktop as a Service (DaaS) cloud computing service delivers Sunrun's virtual desktops to its end users?
 - a. Azure Virtual Desktop
 - b. VMWare Horizon
 - c. **Amazon Workspaces**
 - d. V2 Cloud
 - e. WorkspaceONE
3. Which term describes a piece of computer hardware or software that accesses a service made available by a server connected to a larger network?
 - a. **Client**

- b. Host
 - c. Cloud
 - d. Virtual Machine (VM)
4. What is Sunrun's default browser for company applications?
- a. Firefox
 - b. Internet Explorer
 - c. Safari
 - d. Chrome
 - e. Edge
5. Which of the following refers to a computer resource that uses software instead of a physical computer to run programs and deploy apps?
- a. Virtual Machine (VM)
 - b. Server
 - c. Network
 - d. Host Machine
6. At Sunrun, what is the messaging platform that we integrate into Amazon Web Services (AWS)?
- a. Slack
 - b. Microsoft Teams
 - c. Google Chat
 - d. Cisco Jabber
 - e. Monday.com
 - f. Chatter
7. Which Sunrun team uses this AWS messaging integration?
- a. TechOps
 - b. Talent Operations
 - c. Engineering & Design
 - d. Sales
 - e. Field Services Team

8. What is the next step in escalation for Amazon Web Services (AWS) or Slack issues?
- a. Networking
 - b. ERP Support
 - c. Tier II Service Desk - Hardware
 - d. Tier II Service Desk - Applications

Section 2 - Coupa

Tech Terms

- Coupa
- Expense Reporting
- Okta

Knowledge Base Articles

- [Expense Reporting \(Coupa\) Overview](#)

Infographic

- [Technology Authentication Integrations Diagram](#)

Videos

- [Introduction to Coupa](#)
- [Coupa Expense Reporting](#)

In-Call Videos/Recordings

- [Coupa Expense Reporting - Yesenia Mata](#)

Tier 1 Information - Coupa

Escalation: ERP Support

Subject Matter Expert (SME): Mahipal Velumula

Chat: N/A

Notes:

- Expense Reporting doesn't require an Access Request
- Coupa can be added to Okta by going to: Add Apps > search Expense Reports > Add Coupa tile to Okta.

Assessment

1. At Sunrun, what daily operation does Coupa support?
 - a. Solar Design
 - b. App Integration
 - c. Expense Reporting
 - d. Fleet Maintenance
 - e. Facilities Management
2. Who is Sunrun's subject matter expert (SME) for Coupa?
 - a. Tom Madar
 - b. Matt Rittenberry
 - c. Mahipal Veluma
 - d. Rex Beauchamp
3. Where should a Tier 1 Service Desk agent escalate a ticket for an issue that can't be resolved in Coupa?
 - a. IT Service Desk Tier II - Applications
 - b. LMS Team
 - c. Network Admins
 - d. ERP Support

Section 3 - Salesforce (CRM)

Tech Terms

- CalSync
- CAPTCHA
- Challenge-Response Authentication
- Customer Relationship Management (CRM)
- Incident
- Nice inContact
- Okta
- Salesforce
- Single Sign-On (SSO)
- SOX Application Request
- SOX Compliance

Knowledge Base Articles

- [Salesforce: How to's and General Guides](#)
- [CRM Support - Tier 1 Sales Requests Procedures](#)
- [InContact Support - Password Reset](#)
- [Salesforce Access Request Process for Tier 1 Service Desk](#)
- [Salesforce Calendar Sync Issues](#)
- [Salesforce Login Errors](#)
- [CRM Queue Triage Process](#)

Infographic

- [Technology Authentication Integrations Diagram](#)

Videos

- [Salesforce 101](#)
- [Salesforce from the User Perspective](#)
- [Salesforce Overview](#)

In-Call Videos/Recordings

- [Salesforce Access - Huseen Sufi](#)
- [Salesforce Support - Danny Mann](#)

Tier 1 Information - Salesforce

Escalation: Service Desk II

Subject Matter Expert (SME):

- Blue: Todd Sells & Noah Roberts
- Orange: Michael Esparza, Eric Hirst, Chris Prior, Matt May

Chat: DS-SFDC, Field Sales

Notes:

- Tier 1 Service Desk Support for Salesforce includes:
 - Initial Troubleshooting (i.e., checking browser configuration)
 - Appointment Region (updates or changes)
 - Lead Qualifier Changes
 - CalSync
 - SFDC assignment in Okta
 - Initial SSO errors
- All other Salesforce issues should be escalated to Tier II Service Desk. Before escalating a ticket for Salesforce issues, the Tier 1 agent should include:
 - Opportunity ID
 - Project Number
 - Account information
 - Proposal information.
- New SOX Application Access Requests are available in Orange ServiceNow as of October 4, 2021.

Assessment

1. True or False: CalSync can only be configured as a two-way sync between calendars. (False; **CalSync** is an app integration that syncs a user's **Salesforce Calendar** to his/her **Google Calendar**. CalSync can be configured as a one-way sync or a two-way sync between calendars.)
2. For how many days does CalSync synchronize events between an agent's Salesforce calendar and his/her Google Calendar?
 - a. 30 days
 - b. 60 days
 - c. 90 days
 - d. 120 days
3. In computer security, what is the name for a family of protocols in which one party presents a question and another party provides a valid answer to be authenticated?
 - a. **Challenge-response authentication**
 - b. Multi-factor authentication (MFA)
 - c. 2FA
 - d. Single Sign-On (SSO)
 - e. Biometric Authentication
4. At Sunrun, what technology manages all relationships and interactions with customers and potential customers, streamlines processes and improves profitability?
 - a. Mobility
 - b. Coupa
 - c. Amazon Web Services (AWS)
 - d. **Salesforce (CRM)**
 - e. Okta (SSO)
 - f. Nice inContact
5. In ServiceNow, what acronym identifies a record that can be tracked until service is restored and the issue is resolved?

- a. INC
 - b. CMBD
 - c. CRM
 - d. KPI
 - e. SOX
 - f. SLA
6. What does SOX Compliance protect Sunrun from?
- a. Cold feet
 - b. Fraudulent corporate accounting activities
 - c. Customer Relationship Management (CRM)
 - d. Key Performance Indicators (KPI)
 - e. Service Level Agreements (SLA)
7. What are the three major segments of a customer's Salesforce account?
- a. Opportunity, service, solar project
 - b. CRM, SLA, KPI
 - c. Files, accounts, customers
 - d. Lead, proposal, product
8. True or False: Tier 1 Service Desk agents should always complete requests to alter customer information in a timely manner as outlined in Service Level Agreements (SLAs). (False; Tier 1 Service Desk Agents always deny requests to alter customer information. Service Desk is here to assist, but often we can only determine the problem. If there is an issue with the information stored there, the department or original editor of the record needs to own it.)
9. In the list below, select five requests for CRM Support Sales issues that Tier 1 Service Desk agents have permissions to complete.
- a. Appointment Region Provisioning
 - b. Lead Qualifier Changes
 - c. SFDC assignment in Okta

- d. Initial SSO errors & Browser Troubleshooting
 - e. CalSync
 - f. SOX Application Approvals
 - g. Customer Information Alterations
 - h. Report/Dashboard Shares
 - i. Object/Field Logic Changes
10. A Salesforce Agent's password is sometimes referred to as _____.
- a. InContact password
 - b. Active Directory password
 - c. Okta password
 - d. Workforce password
 - e. Google Workspace password
11. Sort the following steps in the correct order to reset a Salesforce Agent's password.
- a. Navigate to <https://login.incontact.com/>
 - b. Enter Username (Sunrun email).
 - c. Click Next.
 - d. Click "Forgot Password?"
 - e. Click "Send Instructions to the user email" & complete any CAPTCHA instructions.
 - f. Open an email from "NGAgentEventLog" that contains a link.
 - g. Select the link, which will open the next screen where they can create a new/unique password.
 - h. Use the new password to log into Salesforce Agent.
12. When a Sunrun employee requests access to Salesforce via access request (AR), how long is the service level agreement (SLA) for processing the request?
- a. 1 day
 - b. 2 days

- c. 3 days
 - d. 4 days
- 13. What is the next step in escalation for Salesforce issues?
 - a. Service Desk Tier II
 - b. TechOps
 - c. Core Services
 - d. NetOps
- 14. Before a Tier 1 Service Desk agent escalates a Salesforce issue, what information should be included in the ticket?
 - a. Opportunity ID
 - b. Project Number
 - c. Account Information
 - d. Proposal Information
 - e. User ID
 - f. Branch Location
 - g. Federation ID
 - h. User License

Section 4 - Mobility

Tech Terms

- Asset Management
- Configuration Item (CI)
- International Mobile Equipment Identity (IMEI)
- Mean Time Between Failures (MTBF)
- Mean Time to Recover (MTTR)
- Okta
- Serial Number
- Service Level Agreement (SLA)
- ServiceNow

- SIM Card
- Unified Endpoint Management (UEM)
- WorkspaceONE

Knowledge Base Articles

- [Cell Phone Repair and Deployment Process](#)
- [Lost/Stolen Equipment Policy](#)
- [Manually Adding Google Account to Samsung Galaxy Note](#)
- [Shipping a New-Deploy Device](#)
- [Service Desk - IT Mobility Information \(Tips and Tricks\)](#)
- [iPad/iPhone - Gmail and Google Calendar Setup Guide](#)
- [MDM Remote Management Enrollment Troubleshooting Guide](#)

Infographic

- [Technology Authentication Integrations Diagram](#)

Videos

- [AirWatch Unified Endpoint Management \(UEM\) Overview](#)
- [WorkspaceONE Assist for iOS Devices](#)
- [AirWatch WorkspaceOne Overview](#)
- [Clear Cache & Cookies on iPad/iPhone](#)

In-Call Videos/Recordings

- [Mobility Support - Ben Ehlinger](#)

Tier 1 Information -

Escalation: Service Desk II - Hardware

Subject Matter Expert (SME): Zach Miller

Chat: Escalations Mobility

Notes: N/A

Assessment

1. _____ is a systematic process of developing, operating, maintaining, upgrading, and disposing of an organization's assets or configuration items (CIs) in the most cost-effective manner (including all costs, risks and performance attributes).
 - a. Asset management
 - b. Service Level Agreement (SLA)
 - c. Unified Endpoint Management (UEM)
 - d. Mean Time to Recover (MTTR)
2. What does an IMEI number identify?
 - a. A mobile network
 - b. A mobile device
 - c. A mobile carrier
 - d. A mobile customer
3. A _____ is a unique number assigned by a manufacturer to help identify an individual device, like a phone, tablet or TV.
 - a. IMEI Number
 - b. Serial Number
 - c. Phone Number
 - d. Configuration Number
4. When a service level agreement (SLA) is defined in a contract, such service levels should be _____ and _____.
 - a. Affordable
 - b. Specific
 - c. Measurable
 - d. Reasonable
 - e. Recoverable

- f. Available
5. With which mobility component are ICCID and IMSI numbers associated?
- a. SIM Card
 - b. Configuration Item (CI)
 - c. Service Level Agreement (SLA)
 - d. Mobile network
 - e. Serial Number
6. _____ is a class of software tools that provide a single management interface for mobile, PC and other devices.
- a. Unified Endpoint Management (UEM)
 - b. Service Level Agreement (SLA)
 - c. Configuration Item (CI)
 - d. Asset Management
7. When interacting with a Sunrun-issued mobile device, what information should Tier 1 Service Desk agents verify matches the information in Verizon Portal? (Choose all that apply)
- a. Asset Tag
 - b. IMEI, Sim Card #, Phone Number
 - c. ServiceNow Cost Center
 - d. ServiceNow Device Assignment
 - e. Mobile Service Contract
 - f. Department
 - g. Location
 - h. Supervisor
8. If a Sunrun-issued Windows or Mac computer is lost/stolen, the employee to whom the device was assigned must complete the _____ form and attach it to the incident.
- a. Service Level Agreement (SLA)
 - b. Asset Management

- c. International Mobile Equipment Identity (IMEI)
 - d. Unified Endpoint Management (UEM)
 - e. Information Security Incident
9. In which Sunrun platform is lost/stolen equipment logged and managed?
- a. Salesforce
 - b. Coupa
 - c. ServiceNow/SunrunNow
 - d. Okta
 - e. WorkspaceONE
10. What is the next step in escalation for Mobility/Mobile Device issues?
- a. IT-Mobility
 - b. Tier II - Hardware
 - c. Core Services
 - d. TechOps
11. _____ and _____ are digital platforms that work together to deliver and manage any app on any device by integrating access control, application management and unified endpoint management. The platform enables Sunrun IT to deliver a digital workspace that includes Sunrun-specific devices and apps without sacrificing the security and control that professionals need.
- a. WorkspaceONE
 - b. Airwatch
 - c. ServiceNow
 - d. Coupa
 - e. Amazon Web Services (AWS)
 - f. Slack

Module: Human Resources

Welcome

At Sunrun, Human resources (HR) is the department that is charged with finding, screening, recruiting and training job applicants, as well as administering employee-benefit programs. HR plays a key role in helping Sunrun deal with a fast-changing business environment and a greater demand for quality employees in the 21st century. IT Service Desk agents regularly support HR employees with the digital tools and devices they use to do their jobs daily.

Section 1 - iCIMS

Tech Terms

- iCIMS
- Human Resources (HR)
- Job Requisition (Req)
- Okta

Knowledge Base Articles

- [How to Create a Req in iCIMS](#)
- [General iCIMS Access Request](#)

Videos

- [iCIMS Talent Cloud](#)

In-Call Videos/Recordings

- [iCIMS Support - Adam Davis](#)

Tier 1 Information - iCIMS

Escalation: Wally Pfingsten, HR Systems Analyst

Subject Matter Expert (SME): Wally Pfingsten, HR Systems Analyst

Chat: N/A

Notes: N/A

Assessment

1. iCIMS is Sunrun's _____ platform.
 - a. Talent cloud
 - b. Expense reporting
 - c. Malware response
 - d. Benefits management
2. A _____ is a request to fill a job and start the hiring process.
 - a. Job requisition
 - b. Job description
 - c. Job posting
 - d. Job interview

Section 2 - Learning Portal (Litmos)

Tech Terms

- Learning Management System (LMS)
- Human Resources (HR)
- Okta

Knowledge Base Articles

- [Learning Portal - Tier 1 Support](#)
- [FAQ - Litmos \(Learning Portal\) Admin Functions](#)
- [Learning Portal - Direct and Inside Sales Curriculum Program](#)

Videos

- [Litmos LMS Admin Tour](#)
- [Litmos LMS Overview](#)

In-Call Videos/Recordings

- [Learning Portal Support - Joe Falbo](#)

Tier 1 Information - Learning Portal

Escalation: Litmos Learning Portal

Subject Matter Expert (SME): Donald Simpson

Chat: IT Service Desk, LMS

Notes:

- Learning Portal is where end-user's HR and Job trainings are housed.
- This should be automatically provisioned in Okta when the employee is onboarded. If it's missing, Tier II can re-provision the tile in Okta.
- If an employee is missing training or having issues completing training, a ticket can be submitted to the Litmos Team for module/course correction.
 - For any issue related to a content (module, course, learning path), please collect the following information:
 - Title of the specific asset
 - Exact details of the user experience with a screenshot of the whole screen
 - Device (laptop, tablet, etc.)
 - Is it a Sunrun device?
 - Browser (Chrome, Firefox, Safari, etc.)
 - How are they accessing the course?
- Some training must be completed in order to gain access to certain applications. (For example, if an employee does not complete their Data & Security training or it becomes overdue, the employee will be

locked out until completion and submission of their certificate of completion.)

- Tier 1 Service Desk Learning Portal (Litmos LMS)
 - impersonate or masquerade as the end-user in Learning Portal to see what they have completed
 - In order to have access to iCIMS, the 'IsManager' line in Okta must be set to 'Yes'.

Assessment

1. _____ is a software application for the administration, documentation, tracking, reporting, automation and delivery of educational courses, training programs or learning and development programs.
 - a. Learning Management System (LMS)
 - b. Human Resources (HR)
 - c. Customer Relationship Management (CRM)
 - d. Configuration Management Database (CMDB)
2. _____ is the department that is charged with finding, screening, recruiting and training job applicants, as well as administering employee-benefit programs.
 - a. Human Resources (HR)
 - b. Information Technology (IT)
 - c. Project Management (PM)
 - d. Marketing
3. Which platform(s) provide user account data for Sunrun's Learning Portal (Litmos LMS)?
 - a. Okta
 - b. Workday
 - c. Salesforce
 - d. iCIMS
 - e. Coupa

- f. Amazon Web Services (AWS)
 - g. Active Directory
- 4. What types of employee training are housed in Sunrun's Learning Portal (Litmos LMS)?
 - a. Human Resources (HR) Training
 - b. Job Training
 - c. Benefits Training
 - d. VPN Training
- 5. Who is the subject matter expert (SME) for Sunrun's Learning Portal (Litmos LMS)?
 - a. Matt Rittenberry
 - b. Tom Madar
 - c. Rex Beauchamp
 - d. Donald Simpson
- 6. If an employee does not complete _____ training before the deadline, the employee's access accounts will be locked until completion and submission of completion certificate.
 - a. Data Security & Privacy
 - b. Human Resources (HR)
 - c. IT Service Delivery (ITSD)
 - d. Commercial Vehicle Safety

Section 3 - Workday

Tech Terms

- BetterCloud
- Customer Relationship Management (CRM)
- Full Time Equivalent (FTE)
- Furlough

- Human Resources (HR)
- Leave of Absence (LoA)
- Okta
- SaaS Management Platform (SMP)
- Software as a Service (SaaS)
- SOX Compliance
- Workday

Knowledge Base Articles

- [Furloughed Worker Return - FAQ](#)
- [Workday Employee Changes Guide](#)
- [Workday Overview](#)
- [Name Change Policy](#)

Videos

- [Workday Overview](#)
- [Workday - IT Service Delivery Support Plan](#)

In-Call Videos/Recordings

- [Workday Support - Scott Cooley](#)

Tier 1 Information - Workday

Escalation: HRConnect@sunrun.com

Subject Matter Expert (SME): N/A

Chat: IT Service Desk, HR/Talent

Notes:

- Workday is the HR application provisioned in Okta.
- All things related to HR like taxes, salary, direct deposit, PTO, etc.
- Login with Okta credentials.

- Tier 1 Service Desk responsibilities:
 - assist users sign into Workday
 - for actual HR related issues,direct the user to HR or their management.

Assessment

1. _____ is often used to measure a worker's involvement in a project or to track cost reductions in an organization.
 - a. Full Time Equivalent (FTE)
 - b. SaaS Management Platform (SMP)
 - c. Furlough
 - d. Customer Relationship Management (CRM)
 - e. SOX Compliance
2. An employee's user access for many Sunrun applications is managed by his/her position in _____.
 - a. Workday
 - b. Okta
 - c. SOX Compliance
 - d. Human Resources (HR)
 - e. BetterCloud
3. Sunrun employees returning from Leave of Absence (LoA) should contact _____ to request access to their accounts.
 - a. leaves@sunrun.com
 - b. Human Resources (HR)
 - c. Customer Relationship Management (CRM)
 - d. SOX Compliance
 - e. Mary Powell, Sunrun CEO
4. Sunrun employee login credentials and accounts are created based on the employee's information in _____.

- a. **Workday**
 - b. Facebook
 - c. the employee's resume
 - d. the employee's job application
 - e. Salesforce
 - f. Active Directory
5. True or False: Employees requesting a change in the display name on their email should contact Human Resources (HR). **(False)**
6. Which Sunrun application integrates with Workday to import data for newly hired employees?
- a. Okta
 - b. Salesforce
 - c. **iCIMS**
 - d. Coupa
 - e. Active Directory

Module: Network Operations

Welcome
For Sunrun's

Section 1 - Meraki

Tech Terms

- Cisco Meraki
- Client
- Single Sign-On (SSO)
- Local Area Network (LAN)
- Media Access Control (MAC) Address
- Network Interface Card (NIC)
- Network Operations Center

- Network Operations (NetOps)
- Service Set Identifier (SSID)
- Transmission Control/Internet Protocol (TCP/IP)
- Wide Area Network (WAN)

Knowledge Base Articles

- [Meraki User Guide](#)
- [Basic Meraki Information for Troubleshooting](#)
- [Enterprise Printer Support For Xerox and Canon Printers](#)
- [Zebra Label Printer Hardware Troubleshooting](#)

Videos

- [Meraki Overview](#)
- [Meraki 101](#)
- [Meraki & WMS Training](#)

In-Call Videos/Recordings

- [Meraki Support - Wesley Short](#)

Tier 1 Information - Meraki

Escalation: Networking

Subject Matter Expert (SME): Will Williams, Jose Barragan, Berlin Bautista

Chat: Escalations Network Ops

Notes:

- Meraki is a read-only, networking monitoring tool.
- Meraki is used to look at network traffic, ports and devices connected to the network.

- Tier 1 Service Desk agents use Meraki when end-users report offices or networks being down/unable to connect. We can verify with Meraki if it's a local computer issue or something networking related.

Assessment

1. A _____ is a collection of devices connected together in one physical location, such as a building, office or home.
 - a. Local Area Network (LAN)
 - b. Wide Area Network (WAN)
 - c. Service Set Identifier (SSID)
 - d. Media Access Control (MAC) address
2. A _____ is a collection of local-area networks (LANs) or other networks that communicate with one another. A WAN is essentially a network of networks, with the Internet the world's largest WAN.
 - a. Local Area Network (LAN)
 - b. Wide Area Network (WAN)
 - c. Service Set Identifier (SSID)
 - d. Media Access Control (MAC) Address
3. A _____ is typically a centralized location where the network operation staff provides supervision, monitoring and management of the network, servers, databases, firewalls, devices and related external services.
 - a. Local Area Network (LAN)
 - b. Wide Area Network (WAN)
 - c. Network Operations Center (NOC)
 - d. Media Access Control (MAC) Address
4. In the Meraki dashboard, which tab would you open when viewing different Sunrun locations to verify network connectivity?
 - a. Network
 - b. Security & SD-WAN
 - c. Switch

- d. Wireless
 - e. Cameras
 - f. Insight
 - g. Organization
5. When troubleshooting issues in Meraki, which dropdown menu allows you to prompt different types of connections?
- a. Policy
 - b. Search Clients
 - c. MAC Address
 - d. User
6. In Meraki's Network-wide tab, which of the following categories can you monitor?
- a. Clients
 - b. Topology
 - c. Event Log
 - d. Map & Floor Plans
 - e. Security
 - f. Switches
 - g. Cameras
 - h. Wireless Connections
7. When viewing the topology of the network in Meraki, which two layers can you view?
- a. L1 - Cameras Layer
 - b. L2 - Link Layer
 - c. L3 - Networking Layer
 - d. L4 - Organization Layer
8. When accessing Maps & Floor Plans in Meraki, what can you see?
- a. A live feed of cameras in the location
 - b. Access Points (APs) in the location

- c. Clients in the location
 - d. Evacuation Maps for the location
 - e. Office Assignments for the location
9. In Meraki, under which tab would you find Appliance Status?
- a. Network
 - b. Security & SD-WAN
 - c. Switch
 - d. Wireless
 - e. Cameras
 - f. Insight
 - g. Organization
10. To view the status of each WAN/Cellular connection in Meraki, which tab would you use?
- a. Network
 - b. Security & SD-WAN
 - c. Switch
 - d. WirelessCameras
 - e. Insight
 - f. Organization
11. What two brands of enterprise-level printers are used in Sunrun facilities?
- a. Xerox
 - b. Canon
 - c. Lexmark
 - d. Dell
 - e. Brother
 - f. Epson
 - g. Konica-Minolta
12. What is the IP address for Sunrun's Zebra Print Server?

- a. 10.30.4.7
 - b. 10.27.6.9
 - c. 10.162.89.4
 - d. 10.0.0.97
13. When setting up a Zebra printer on RF-Smart Cloud, what printer model should you enter?
- a. ZD420
 - b. ZD240
 - c. DZ024
 - d. DZ420
14. Sunrun's Xerox systems are set up on the network to push data to a server named ____.
- a. XDA
 - b. DAX
 - c. XAD
 - d. AXD
15. When Tier I and Tier II Service Desk agents have performed all basic troubleshooting for Xerox printers, and no resolution can be provided, the ticket should be escalated to _____.
- a. Tier III Service Desk - Network Administrators
 - b. Core Services
 - c. Tier III Service Desk - DevOps
 - d. TechOps

Section 2 - Network Operations Center (NOC)

Tech Terms

- Single Sign-On (SSO)
- Network Operations Center
- Network Operations (NetOps)

Knowledge Base Articles

- [NOC Support - Tier 1 Service Desk](#)

Infographic

- [Technology Authentication Integrations Diagram](#)

In-Call Videos/Recordings

- [Network Operations Center \(NOC\) Support - Danny Mann](#)

Tier 1 Information - Network Operations

Escalation: fleetmonitoring@sunrun.com, Tier II - Hardware, Network

Subject Matter Expert (SME): Will Williams

Chat: Escalations Network Ops

Notes:

- Users don't need an Access Request for NOC. They can add it to their Okta.
- Sunrun Okta > Add Apps > search NOC and add.
- Troubleshooting is web-based troubleshooting
 - clear cache & cookies
 - flush DNS

Assessment

1. Within Sunrun's organization, who accesses the Network Operations Center (NOC)?
 - a. Various teams
 - b. Only TechOps
 - c. Only NetOps
 - d. Only Will Williams

2. True or False: Network Operations Center (NOC) is a desktop application that provides data regarding customer production and system information. (False; Network Operations Center (NOC) is a web-based interface application.)
3. True or False: An Access Request (AR) is required before Network Operations Center (NOC) access is provisioned to a user. (False; Most users will be provisioned access automatically due to workflow rules already in place. Access is granted via the +Add Apps functionality within OKTA.)
4. What common issues does the Network Operations Center (NOC) experience on a regular basis?
 - a. Web browser issues
 - b. Escalation issues
 - c. Configuration issues
 - d. Formatting issues
5. When basic troubleshooting does not resolve an issue with Network Operations Center (NOC), the ticket should be escalated to _____.
 - a. fleetmonitoring@sunrun.com
 - b. TechOps
 - c. Escalations Mobility
 - d. ds-ERP

Module: Operating Systems

Welcome
For Sunrun's

Section 1 - Apple iOS

Tech Terms

- Active Directory (AD)

- FORM (Field Operations Resource Management) Software
- International Mobile Equipment Identity (IMEI)
- iOS
- Mobile Data
- Okta
- PhishAlarm
- Security Personal Identification Number (PIN)
- Serial Number
- Workspace ONE & Airwatch

Knowledge Base Articles

- [iPad/iPhone Update iOS](#)
- [iPad/iPhone - Gmail and Google Calendar Setup Guide](#)
- [Adding your Corporate Gmail Account to your iPhone \(iOS\)](#)
- [DialPad for iOS](#)
- [How to Set Up Sunrun Corporate Email on iOS Mail App](#)
- [Account locked out of Active Directory](#)
- [Add Google Calendar - iOS](#)
- [How do I disable mobile data on my iPhone?](#)
- [Sunrun Airwatch Workspace One Admin Guide](#)
- [FORM - Field Operations Resource Management Guide](#)
- [Email - Report Suspicious Emails](#)

Slide Deck

- [How to add Gmail in iOS](#)

Videos

- [iPhone iPad - Clear Cache & Cookies](#)

In-Call Videos/Recordings

- [iPhone Locked Out - Yesenia Mata](#)

Tier 1 Information - Apple iOS

Escalation: Tier II Service Desk

Subject Matter Expert (SME): N/A

Chat: IT Service Delivery, Escalations Hardware

Notes: N/A

Assessment

1. _____ is a mobile operating system created and developed by Apple Inc. exclusively for its hardware. The term also included the versions running on iPads until the name *iPadOS* was introduced with version 13 in _____.
 - a. **iOS/2019**
 - b. MacOS/2007
 - c. iPadOS/2017
 - d. Android/2021
2. _____ is an email add-in which allows a user to easily report a potential phishing email.
 - a. **PhishAlarm**
 - b. Proofpoint
 - c. Gmail
 - d. Outlook 2016
3. When adding Gmail and Google Calendar to a Sunrun-issued iPhone or iPad, where can the Gmail and Google Calendar apps be found?
 - a. **App Store**
 - b. Google Play
 - c. Chrome Web Store
 - d. Google Play Store
4. Which mobile device management platform does Sunrun's IT Department use to track, monitor and administer Sunrun mobile devices, including iPads, iPhones, Chromebooks and laptops?
 - a. **Airwatch WorkspaceONE**
 - b. Proofpoint

- c. PhishAlarm
 - d. Active Directory
5. True or False: If a Sunrun-issued mobile device is reported as lost/stolen, the IT Service Desk may deactivate the device remotely. (TRUE)
6. When a customer has been locked out of his/her Active Directory account, which of the steps below can be used on a mobile device to troubleshoot and resolve the issue?
- a. Update passwords on all mobile devices.
 - b. Remove Sunrun email account on all mobile devices.
 - c. Clear saved passwords from browsers.
 - d. Factory reset the device.
 - e. Report the phone as lost/stolen.

Section 2 - MacOS

Tech Terms

- Asset Tag
- Disk Image
- Domain
- Domain Naming Service (DNS)
- Hard Drive Encryption
- Ivanti Portal Manager
- Line Printer Daemon (LPD)
- MacOS
- Okta
- Operating System
- Sophos
- Transmission Control Protocol (TCP)
- Virtual Private Network (VPN)
- WorkspaceONE Airwatch

Knowledge Base Articles

- [Apple Vulnerability](#)
- [Mac OS SentinelOne Installation & Sophos Uninstallation](#)
- [Mac Sophos Hard Drive Encryption](#)
- [Macbook Sysprep Procedures](#)
- [Ivanti Portal Mac Installation](#)
- [How to Add a Printer to a Mac](#)
- [Installing Google File Stream on a Mac](#)
- [Mac VPN Alternative](#)
- [VPN \(Pulse Secure\) - Macbook Setup Guide](#)
- [Enable Sharing on Mac](#)
- [Change Default File association on Mac/OSX](#)
- [Sentinel One fix with Mojave OS](#)
- [Using LogMeIn with MacOS](#)
- [How to connect to Server on a Mac](#)
- [Account locked out of Active Directory](#)

Videos

-

In-Call Videos/Recordings

- [MacOS Malware Support - Keldon Lopez](#)

Tier 1 Information - MacOS

Escalation: Tier II Service Desk

Subject Matter Expert (SME): N/A

Chat: IT Service Delivery, Escalations Hardware

Notes: N/A

Assessment

1. Before starting hard drive encryption on MacOS, a Tier 1 Service Desk agent must first do what?
 - a. Back-up the user's Google Drive
 - b. Back-up the user's Gmail account
 - c. Reformat the hard drive
 - d. Upgrade RAM on the user's device
2. Which management console is used for hard drive encryption?
 - a. Sophos Central
 - b. Active Directory
 - c. Google Admin
 - d. Virtual Private Network (VPN)
3. To begin hard drive encryption, the first step is to _____.
 - a. Find the user of the MacOS device
 - b. Find the serial number of the MacOS device
 - c. Find the IP address of the MacOS device
 - d. Find recent alerts on the MacOS device
4. Which encryption policy should be applied to a MacOS device?
 - a. MAC Disk Encryption
 - b. MAC Safeguard Encryption
 - c. MAC Device Encryption
 - d. Mac Base Encryption
5. When connecting to Pulse VPN on MacOS, to what URL should a user navigate?
 - a. <https://vpn.sunrun.com/>
 - b. <https://sunrun.vpn.com/>
 - c. <https://macOS.vpn.sunrun.com/>
 - d. <https://vpn.macOS.com/>
6. What credentials should a user enter when connecting to Pulse VPN on MacOS?

- a. Sunrun Okta credentials
 - b. Apple ID credentials
 - c. MacOS VPN credentials
 - d. System Preferences credentials
7. When connecting to the P: drive in MacOS, what network drive path should be used?
- a. smb://ironhide/Public
 - b. smb://server_name
 - c. smb:\\ironhide/Public
 - d. smb:\\server_name
8. _____ is an antivirus, malware removal and management software installed on all Sunrun computers.
- a. Sophos
 - b. Windows 10
 - c. Malwarebytes
 - d. Norton Antivirus
9. A MacOS disk image file name usually has _____ as its extension.
- a. .dmg
 - b. .exe
 - c. .docx
 - d. .img
10. _____ delivers apps, documents and links to MacOS end users so they can install items that are approved for use or required for that user's hardware.
- a. Ivanti Portal Manager
 - b. Sophos Bitlocker Key
 - c. WorkspaceONE Airwatch
 - d. Hard Drive Encryption

Section 3 - Windows

Tech Terms

- Asset Tag
- Command Prompt (cmd.exe)
- Domain
- Domain Naming Service (DNS)
- Hard Drive Encryption
- Key Management Service (KMS)
- Local Administrator Password Solutions (LAPS)
- Microsoft Windows
- Okta
- Operating System
- Sophos
- Virtual Private Network (VPN)
- Workspace ONE & Airwatch

Knowledge Base Articles

- [How to Reactivate Windows License](#)
- [Windows 10 Printer Setup](#)
- [Command Prompt, Shortcuts, and useful Windows Tips and Tools](#)
- [How to Add a Network Drive to a Windows PC](#)
- [\[Windows\] How to add user to VPN Group in Active Directory and Okta](#)
- [How to Map a Network Drive Manually](#)
- [Sophos Bitlocker Recovery error troubleshooting](#)
- [Sophos Disk Encryption- Windows](#)
- [How to start a Sophos Windows service](#)
- [How to Re-Domain a PC](#)
- [Windows Update Failure](#)
- [Enrolling Windows Computer in WorkSpace One](#)

- [Installing Google File Stream on Windows](#)
- [Clearing Windows User Profiles](#)
- [Installing AirWatch for Windows](#)

Videos

- [How to check for Windows Updates](#)
- [Keyboard Shortcuts in Windows 10](#)

In-Call Videos/Recordings

- [Windows License Support - Scott Cooley](#)
- [Windows Okta Password Sync - Adam Davis](#)

Tier 1 Information - Windows

Escalation: Tier II Service Desk

Subject Matter Expert (SME): N/A

Chat: IT Service Delivery, Escalations Hardware

Notes: N/A

Assessment

1. For how many days is a Key Management Service (KMS) activation valid?
 - a. 180 days
 - b. 120 days
 - c. 60 days
 - d. 30 days
2. True or False: Printer issues should be escalated to Tier III Service Desk - NetOps. (False; Printer issues should be escalated to Tier II Service Desk - Hardware or Site Support.)

3. When setting up a printer in Windows 10, and a verification check reveals the printer is already set up in Windows Settings, what is the next step before the printer can be properly set up?
 - a. Remove the printer in Windows Settings, and then start the installer from the Print Server.
 - b. Leave the printer in Windows Settings, and then use the Print Server to create a second instance of the printer.
 - c. Leave the printer in Windows Settings, and do nothing else.
 - d. Escalate the issue to Tier III Service Desk - NetOps.
4. When joining a PC to Sunrun's domain, what domain name should be entered in the 'Member of' field?
 - a. sunrun.global
 - b. global.sunrun
 - c. sunrun.local.global
 - d. local.global.sunrun
5. What keyboard shortcut opens Windows File Explorer?
 - a. Windows Key + A
 - b. Windows Key + B
 - c. Windows Key + C
 - d. Windows Key + D
 - e. Windows Key + E
6. Which two management consoles are used to provision VPN access for an end user?
 - a. Active Directory
 - b. Okta
 - c. Google Admin
 - d. Sophos Central
 - e. WorkspaceONE Intelligent Hub

7. When completing Sophos Disk Encryption on a Windows device, where will you find the disk encryption .exe file needed to complete the operation?
- a. P: Drive > Sophos folder
 - b. Google Shared Drives > Sophos Folder
 - c. P: Drive > Installer Files
 - d. Google Shared Drives > Installer Files
8. While running a Sophos Windows service, under which tab in Task Manager will you restart a service that has stopped?
- a. Process
 - b. Performance
 - c. App History
 - d. Startup
 - e. Users
 - f. Details
 - g. Services
9. When enrolling a Windows device in WorkspaceONE, what software must first be installed?
- a. WorkspaceONE Intelligent Hub
 - b. Google Management Console
 - c. Airwatch
 - d. Active Directory

Module: Service Desk Management (ServiceNow)

Welcome

For Sunrun's

Section 1 - Service Portal

Tech Terms

- Application Navigator

- Asset Management
- Catalog Task
- Connect Chat
- Form
- Incident
- Knowledge Base Article (KBA)
- Records
- Request Management
- Service Level Agreement (SLA)
- ServiceNow
- Service Portal
- Table
- Template

Knowledge Base Articles

- [User Guide for IT Service Delivery Team](#)
- [ServiceNow - Using Templates](#)
- [Virtual Agent - Overview](#)

Videos

- [ServiceNow Workspace](#)
- [ServiceNow - Setting up the Dashboard](#)
- [Now Platform User Interface](#)
- [User Experience Service Portal](#)
- [Application Navigator Overview](#)

In-Call Videos/Recordings

- [Service Now Access - Keldon Lopez](#)

Tier 1 Information -

Escalation: ServiceNow Admins

Subject Matter Expert (SME): Dave Carroll, Eric Hirst, Mike Arbon, Stephanie Larcom

Chat: IT Service Delivery, Escalations Hardware

Notes:

- ServiceNow is Sunrun's current ticketing system for all calls and chats and any requests made.
- help.sunrun.com is a path that all end users take to submit tickets.
- If an end-user is unable to access help.sunrun.com, the end-user's manager can submit a request for access into ServiceNow.

Assessment

1. In ServiceNow, the _____ is a front-end portal framework that provides self-service experiences for Sunrun's customers and employees.
 - a. Service Portal
 - b. Request Management
 - c. Service Level Agreement (SLA)
 - d. Application Navigator
2. In ServiceNow, the _____ provides access to all applications and the modules they contain, enabling users to quickly find information and services.
 - a. Application Navigator
 - b. Catalog Task
 - c. Service Portal
 - d. Service Level Agreement (SLA)
 - e. Asset Management
3. In ServiceNow, a _____ simplifies the process of submitting new records (incident, knowledge, etc.) by populating fields automatically.

- a. Template
 - b. Table
 - c. Record
 - d. Incident
 - e. Form
4. True or False: If you feel a template is not working correctly or has incorrect data, you should update the template on your own so the problem won't affect future users. (False: If you feel a template is not working correctly or has incorrect data, you should notify your manager.)
5. Within Application Navigator, which icon allows you to add an application to your favorites?
- a. Star
 - b. File Box
 - c. Clock
 - d. Funnel

Section 2 - Incidents

Tech Terms

- BeyondTrust Remote Support
- Incident
- Incident Management Process
- iOS
- Knowledge Base Article (KBA)
- Operating System
- Remote Support
- Service Level Agreement (SLA)
- ServiceNow
- Session Key

- Template
- Uniform Resource Locator (URL)
- Virtual Appliance
- Virtual Machine (VM)

Knowledge Base Articles

- [Initiating a Remote Support Session from an Incident](#)
- [How to Attach an Incident to a Problem](#)
- [Escalation Process for Ticket Mentions and Slack](#)
- [How to Create an Incident from a Chat](#)
- [ServiceNow - Attach a KBA to an Incident](#)
- [Incident Management Process \(IMP\) - Scope](#)
- [Incident Management Process \(IMP\) - Roles & Responsibilities](#)
- [Incident Management Process \(IMP\) - Incident Categorization & Prioritization](#)
- [Incident Management Process \(IMP\) - Service Agreements](#)
- [Incident Management Process \(IMP\) - Process Flow](#)
- [Incident Management Process \(IMP\) - Communication](#)

Videos

- [ServiceNow Overview](#)
- [How to Report an Issue](#)
- [How to use Connect Chat](#)
- [Getting Started with Lists](#)
- [Getting Started with Forms](#)

Tier 1 Information -

Escalation: ServiceNow Admins

Subject Matter Expert (SME): Dave Carroll, Eric Hirst, Mike Arbon,
Stephanie Larcom

Chat: IT Service Delivery, Escalations Hardware

Notes:

- ServiceNow is Sunrun's current ticketing system for all calls and chats and any requests made.
- help.sunrun.com is a path that all end users take to submit tickets.
- If an end-user is unable to access help.sunrun.com, the end-user's manager can submit a request for access into ServiceNow.

Assessment

1. A(n) _____ in ServiceNow generates a record (or a “ticket”) that can be tracked until service is restored and the issue is resolved
 - a. Incident
 - b. Record
 - c. Template
 - d. Session Key
2. A _____ is used to encrypt all messages in a single communication session.
 - a. Session key
 - b. Incident
 - c. Record
 - d. Template
3. In ServiceNow, a _____ simplifies the process of submitting new records by populating fields automatically.
 - a. Session Key
 - b. Incident
 - c. Record
 - d. Template

4. A **URL** is a Uniform Resource Locator, a tool used to find webpages. Which of the elements below does a URL include?
- a. Protocol
 - b. Domain
 - c. Path
 - d. Webpage Name
 - e. SSID
 - f. IMEI
 - g. Serial Number
5. When initiating a BeyondTrust Remote Support Session with a customer, what should a Tier 1 Support Desk agent do first to ensure a smooth process throughout the call?
- a. Make sure an active Bomgar Representative Console is running prior to initiating the session.
 - b. Send the customer all necessary information regarding the session, including the start and stop time.
 - c. Open an existing incident ticket, or create a new incident for the customer requesting support.
 - d. Select the 'BeyondTrust Session Key' button within the incident to prompt the file download containing a session key.
6. When supporting an iOS customer via a BeyondTrust Remote Support Session, you must share the support session URL and what else?
- a. A 7-digit key located above the URL
 - b. A copy of the incident where you're entering their information
 - c. Your email address and phone number in case you lose the session connection
 - d. A screenshot of your desktop
7. True or False: When a BeyondTrust Remote Support Session ends, the Tier 1 Service Desk agent will need to enter all the session information

- into the support ticket before submitting it. (False: When a BeyondTrust Remote Support Session ends, all session information will automatically be added to the support ticket.)
8. True or False: When attaching an incident to a problem, you should post all examples as a work note in the problem record. (False: You should post all examples as a comment.)
9. All ticket escalations should have a post in the work notes explaining which of the following?
- Why the ticket was escalated
 - What troubleshooting steps have taken place
 - Any support or guidance that was offered outside of the ticket
 - All previous incidents by the same caller

Section 3 - Requests

Tech Terms

- Asset Management
- Desktop Support
- Incident
- Request Management
- Service Level Agreement (SLA)
- ServiceNow
- Service Portal
- SOX Compliance
- Template
- Uniform Resource Locator (URL)

Knowledge Base Articles

- [Access Request Process and Policies](#)
- [Creating ServiceNow Ticket Requests](#)
- [CRM Support Requests](#)
- [Salesforce Access Requests](#)
- [Google Group Management Requests](#)
- [Network Share/Shared Drive Access Requests](#)
- [Hardware Requests](#)
- [Application Access Requests - Part 1](#)
- [Application Access Requests - Part 2](#)
- [Lost/Stolen Equipment Requests](#)

Videos

- [How to Submit a Request](#)

In-Call Videos/Recordings

- [Replacement Phone Request - Yesenia Mata](#)

Tier 1 Information - Requests

Escalation: IT - Site Support

Subject Matter Expert (SME): Bre Lillybridge, Keldon Lopez, Nathan Murtie, Stephanie Larcom

Chat: Escalations Hardware

Notes:

- Information required for escalation:
 - Hardware troubleshooting
 - asset tag
 - serial number
 - screenshots

- If creating an appointment, these are available locations for Site Support; a ticket is not required to make the appointment.
 - <https://sanfranciscosupport.setmore.com/sunrun>
 - <https://vslr.setmore.com/lehitech>
 - <https://sunrundenver.setmore.com/schedule>

Assessment

1. Sunrun's _____ team is staffed with information technology (IT) professionals who maintain the company's computer hardware and software systems.
 - a. Desktop Support
 - b. Salesforce Administration
 - c. Tier II - Applications
 - d. Tier 1 Service Desk
2. Sunrun's ServiceNow platform organizes non-billable request types in the Service Catalog by their functional category, allowing customers to easily find services through a process called _____.
 - a. Request Management
 - b. SOX Compliance
 - c. Desktop Support
 - d. Service Level Agreement (SLA)
3. True or False: ServiceNow allows Sunrun employees to report and track problems that are impacting workflow. (True)
4. What is the initial point of access for ServiceNow?
 - a. Okta Dashboard
 - b. Sunrun's Knowledge Base
 - c. via a Session Key
 - d. via Desktop Support

- e. via a Virtual Machine (VM)
5. What is the Uniform Resource Locator (URL) for the Sunrun Help Portal?
- a. **help.Sunrun.com**
 - b. Sunrun.help.com
 - c. helpdesk.Sunrun.com
 - d. Sunrun.helpdesk.com
6. When end users navigate to the Sunrun Help Portal, what four main options will they see?
- a. **Get IT Help**
 - b. **My Requests**
 - c. **Request Something**
 - d. **Search Knowledge Base**
 - e. Check a Service Level Agreement (SLA)
 - f. Asset Management
 - g. SOX Compliance
 - h. Operating Systems
7. Where are CRM Requests typically routed?
- a. **CRM Engineering Support Queue**
 - b. IT Service Desk Dashboard
 - c. Lead Qualifier Support Queue
 - d. Salesforce
8. Which requests for CRM Support Sales issues do Tier 1 Service Desk agents have permissions to complete?
- a. **Appointment Region Provisioning**
 - b. **Lead Qualifier Changes**
 - c. **SFDC assignment in Okta**
 - d. **Initial SSO errors & Browser Troubleshooting**
 - e. **CalSync**
 - f. SOX Application Approvals

- g. Customer Information Alterations
 - h. Report/Dashboard Shares
 - i. Object/Field Logic Changes
9. When a Sunrun employee requests access to Salesforce via access request (AR), how long is the service level agreement (SLA) for processing the request?
- a. 1 day
 - b. 2 days
 - c. 3 days
 - d. 4 days
10. If a Tier 1 Service Desk agent receives a Google Group request via an incident in ServiceNow, what is the proper response?
- a. Instruct the requestor to complete a Google Group Service Request.
 - b. Call 844-809-3445 to explain why they need access.
 - c. Contact Desktop support instead.
 - d. Immediately escalate the incident to ds-general.
11. Which application is used to fulfill Google Group requests and establish default settings?
- a. BetterCloud
 - b. Salesforce
 - c. Okta
 - d. ServiceNow
12. Where are access requests for network shares typically routed?
- a. Network Administrators Team
 - b. Tier II - Application Support
 - c. Tier II - Desktop Support
 - d. ServiceNow Administrators
13. What is the first step for submitting a hardware request?
- a. Submit a ticket with appropriate end user information.

- b. Call Desktop Support.
 - c. Escalate a ticket to the Hardware Repair/Deployments queue.
 - d. Fulfill the hardware request yourself.
14. Which form should a Tier 1 Service Desk agent provide an end user who needs to report lost/stolen computer assets?
- a. Information Security Incident form
 - b. Asset Management Form
 - c. Escalated Incident Form
 - d. a Police Report

Section 4 - Connect Chat

Tech Terms

- Connect Chat
- Direct Conversation
- Group Conversation
- Incident
- Knowledge Base Article (KBA)
- Remote Support
- Service Level Agreement (SLA)
- ServiceNow
- Service Portal
- Template

Knowledge Base Articles

- [ServiceNow Connect Chat Support - How To](#)
- [How to Start a Direct or Group Chat](#)

Videos

- [ServiceNow Chat Overview](#)

In-Call Videos/Recordings

- [ServiceNow Support - Scott Cooley](#)

Tier 1 Information - ServiceNow Connect Chat

Escalation: N/A

Subject Matter Expert (SME): Stephanie Larcom, Dave Carroll, Erik Hirst, Mark Arbon, Sean Madden

Chat: N/A

Notes: N/A

Assessment

1. In the ServiceNow Connect Sidebar, which icon would you select to view the Chat Support Queue?
 - a. Magnifying Glass
 - b. Chat Bubbles
 - c. Question Mark
 - d. Gear
2. Inside the Connect Chat queue, what action establishes a session with the end user and opens a new chat box in the user interface?
 - a. Click 'accept'.
 - b. Open ServiceNow.
 - c. Restart your device.
 - d. Email the end user.
3. When a Connect Chat session ends, what is the next step for a Tier 1 Service Desk agent?
 - a. Disposition the record with the appropriate call result.
 - b. Escalate the chat to Tier II - Applications.

- c. Close the Connect Chat queue, and allow ServiceNow to automate the rest of the process.
 - d. Ask the end user to enter any remaining information in the chat.
4. Arrange the steps below in the correct order to submit a record for a Connect Chat session.
 - a. Step 1 - Select 'Incident'
 - b. Step 2 - Click 'Update'
 - c. Step 3 - Create a new incident record.
 - d. Step 4 - Copy applicable information into the INC.
 - e. Step 5 - Include the task number.
 - f. Step 6 - Submit the record.
5. In ServiceNow Connect Chat, what is the difference between a direct conversation and a group conversation?
 - a. A group conversation involves more users than a direct conversation.
 - b. A direct conversation is shorter than a group conversation.
 - c. A group conversation requires more windows than a direct conversation.
 - d. There is no difference between a direct conversation and a group conversation.

Section 5 - Knowledge Base

Tech Terms

- Incident
- Knowledge Base
- Knowledge Base Article (KBA)
- ServiceNow
- Template
- Uniform Resource Locator (URL)

Knowledge Base Articles

- [Attaching a Knowledge Base Article \(KBA\) to an Incident](#)
- [How to Create a Knowledge Base Article \(KBA\)](#)
- [Knowledge Base Article \(KBA\) Do's & Don'ts](#)
- [Knowledge Base Article \(KBA\) Style Guide](#)
- [Knowledge Base Articles \(KBAs\) - A Complete How-To](#)

Videos

- [How to use the Knowledge Base](#)

Tier 1 Information - ServiceNow Knowledge Base

Escalation: N/A

Subject Matter Expert (SME): IT Service Desk Managers, Erik Stolberg

Chat: IT Service Delivery

Notes: N/A

Assessment

1. When attaching a Knowledge Base Article (KBA) to an open Incident, in which field should you attach it to ensure that the end user can view the document easily?
 - a. **Additional comments**
 - b. Short description
 - c. Related Search
 - d. Assigned To
2. After attaching a Knowledge Base Article (KBA) to an incident, what should the Tier 1 Service Desk agent do?
 - a. **Follow up with the customer/employee**
 - b. Escalate the ticket

- c. Delete the ticket
 - d. Email the customer/employee with a duplicate copy of the ticket and KBA.
- 3. When composing a Knowledge Base Article (KBA), what color should be used when adding shapes or arrows that will draw attention to a specific area of a screenshot?
 - a. Red
 - b. Orange
 - c. Yellow
 - d. Green
 - e. Blue
 - f. Indigo
 - g. Violet
- 4. True or False: When composing a Knowledge Base Article (KBA), it's acceptable to draw shapes or arrows on a screen shot as long as they're the appropriate color. (False: You should use an editor to draw a square or rectangle shape to select the area you need the user to follow.)
- 5. True or False: When composing a Knowledge Base Article (KBA), you should avoid using contractions and abbreviations when possible. (True)
- 6. In a Knowledge Base Article (KBA), which format should dates follow?
 - a. YYYY-MM-DD
 - b. DD-MM-YYYY
 - c. MM-DD-YYYY
 - d. YYYY-DD-MM
- 7. In a Knowledge Base Article (KBA), what is the only content that should be underlined?
 - a. Uniform Resource Locator (URL)
 - b. Titles
 - c. Headings

- d. Proper Names
8. When creating a Knowledge Base Article (KBA), which of the following is not a template available for use?
- a. Standard
 - b. FAQ
 - c. How To
 - d. KCS Article
 - e. Simple Attachment
 - f. What is
 - g. Escalation
9. What does the acronym KCS stand for?
- a. Knowledge - Content - Support
 - b. Keep - Categorize - Send
 - c. Keywords - Customers - Software
 - d. Knowledge - Communication - System
 - e. Known Error - Cause - Solution
10. What are the two sections of a 'How to' Knowledge Base Article (KBA) template?
- a. Introduction
 - b. Instructions
 - c. Environment
 - d. Cause
 - e. Resolution
 - f. Question
 - g. Answer

Section 6 - Asset Management

Tech Terms

- Asset

- Asset Management
- Asset Tag
- Incident
- Knowledge Base Article (KBA)
- Records
- Request Management
- Service Level Agreement (SLA)
- ServiceNow
- Serial Number

Knowledge Base Articles

- [Asset Management in ServiceNow](#)
- [Asset Collection for Terminated Employees](#)
- [Hardware Processes](#)
- [Chromebook Provisioning](#)

Videos

- [Required Equipment](#)
- [Hardware Asset Management Overview](#)

In-Call Videos/Recordings

- [Hardware Damaged - Adam Davis](#)

Tier 1 Information - Asset Management

Subject Matter Expert (SME): Bre Lillybridge, Keldon Lopez, Nathan Murtie, Stephanie Larcom

Chat: Escalations Hardware

Notes:

- Information required for escalation:

- Hardware troubleshooting
- asset tag
- serial number
- screenshots
- If creating an appointment, these are available locations for Site Support; a ticket is not required to make the appointment.
 - <https://sanfranciscosupport.setmore.com/sunrun>
 - <https://vslr.setmore.com/lehitech>
 - <https://sunrundenver.setmore.com/schedule>

Assessment

1. In ServiceNow Assets, a device's asset state is set to _____ if the asset is going into a storage room to await deployment.
 - a. In stock
 - b. Assigned to
 - c. Portfolios
 - d. Service Desk
2. In ServiceNow Assets, a device's asset state is set to _____ if this asset will be immediately used by an employee.
 - a. In use
 - b. Returned
 - c. Assigned to
 - d. Asset Tag
3. Where can you find the asset tag on a Sunrun-issued computer monitor?
 - a. Under the base
 - b. On the top back corner
 - c. On the front right corner
 - d. Computer monitors are not asset tagged.

4. When a Sunrun-issued Macbook laptop is issued to an employee, what is the preset password at login?
- a. Solar123
 - b. Sunrun123
 - c. SunrunIT123
 - d. SunrunSolar123
5. Arrange the steps below in the correct order for receiving broken equipment.
- a. Step 1 - Broken equipment is tested.
 - b. Step 2 - Broken equipment is retired in ServiceNow Assets.
 - c. Step 3 - The asset tag is removed from the broken equipment.
 - d. Step 4 - Broken equipment is placed outside for proper disposal.
6. _____ team members will ensure all Chromebooks are enrolled in the enterprise enrollment system before shipping the device to a Sunrun employee.
- a. Site Services
 - b. Tier 1 Service Desk
 - c. Asset Management
 - d. ServiceNow
7. How many days is allowed in the Service Level Agreement (SLA) for issuing Chromebooks and other equipment for newly hired employees and internal transfers?
- a. 1 day
 - b. 3 days
 - c. 5 days
 - d. 7 days

Module: Virtual Private Network (VPN)

Welcome

For Sunrun's

Section 1 - VPN/Pulse Secure

Tech Terms

- App Launcher
- Chrome Menu
- Chromebooks & ChromeOS
- MacOS
- Microsoft Windows
- Okta
- Operating System
- Pulse Secure VPN
- Secure Sockets Layer VPN (SSL VPN)
- Single Sign-On (SSO)
- Virtual Private Network (VPN)

Knowledge Base Articles

- [Announcing Pulse Secure](#)
- [VPN \(Pulse Secure\) - Chromebook Setup Guide](#)
- [VPN \(Pulse Secure\) - Windows Setup Guide](#)
- [VPN \(Pulse Secure\) - Macbook Setup Guide](#)
- [VPN \(Pulse Secure\) - Macbook - How to Connect](#)
- [How to fix Slow VPN Issues on Zbook G5](#)
- [Pulse VPN MultiFactor Authentication \(MFA\)](#)
- [Pulse VPN Connection Issues](#)

Videos

- [Pulse Secure VPN Overview](#)

- [Pulse Secure in 2 Minutes](#)

In-Call Videos/Recordings

- [Pulse Secure VPN Support - Yesenia Mata](#)

Tier 1 Information - VPN

Escalation: IT - Site Support; Networking

Subject Matter Expert (SME): Bre Lillybridge, Nathan Murtie, Jose Barragan, Anthony Acosta, Yash Tomar, Matthew Haines

Chat: IT Service Delivery

Notes:

- Used on Sunrun (blue) domained machines and devices
- Tier 1 Service Desk Responsibilities:
 - Configuration
 - Password Sync
 - Installation & Setup (Mac, Chromebook, Windows)
 - Updates
 - Connection Failure
 - Domain Issues
 - Account Lockout
 - Login Credentials
 - Uninstall/Reinstall
- Uninstall/Reinstall Steps:
 - Uninstall all related files from the Control Panel.
 - Delete Pulse from %appdata%
 - Empty recycle bin (ask if the customer needs anything in the bin prior to deletion).
 - Go to <https://vpn.sunrun.com> to reinstall.

- Use Okta credentials without @sunrun.com in the username field.
- If this does not work, go to the admin profile and start the process over.
- Current Version: 9.1.11

Assessment

1. When checking a Chrome browser to verify the most updated ChromeOS version is installed, which of the following steps is not necessary?
 - a. Open Chrome menu/settings from the ellipse (indicated by three vertical dots in the upper right corner of the browser window).
 - b. **Uninstall/reinstall Chrome browser, then return to Chrome menu.**
 - c. Select 'About Chrome OS' in the bottom left corner.
 - d. **Submit a ServiceNow ticket indicating your current ChromeOS version for recordkeeping.**
 - e. Select 'Check for Updates'.
 - f. **Verify the asset tag number on the bottom of the Chromebook.**
2. Arrange the steps below in the correct order for checking a Chromebook to verify the most updated ChromeOS version is installed.
 - a. **Step 1 - Select the clock/time on the bottom right of the screen.**
 - b. **Step 2 - Select settings gear.**
 - c. **Step 3 - Select About Chrome OS at bottom left.**
 - d. **Step 4 - Select "Check for updates".**
3. To locate an old instance of Pulse Secure VPN on a Chromebook, which ChromeOS tool should be used *first*?
 - a. **App Launcher**
 - b. Chrome Menu
 - c. Settings Gear
 - d. Google Play Store

4. To locate and install a new version of Pulse Secure VPN on a Chromebook, which tool should you use?
 - a. App Launcher
 - b. Chrome Menu
 - c. Settings Gear
 - d. Google Play Store
5. True or False: Pulse Secure VPN is installed on Sunrun-issued Windows devices by default. (True)
6. When installing Pulse Secure VPN or updating to the newest version on a Windows or MacOS device, to which Uniform Resource Locator (URL) should you navigate?
 - a. <https://vpn.sunrun.com>
 - b. <https://sunrun.vpn.com>
 - c. <https://pulsesecure.sunrun.com>
 - d. <https://pulsesure.vpn.com>
7. After downloading and opening the Pulse Secure VPN app launcher on a MacOS device, you will select 'OK' to clear a security warning. What is the next step?
 - a. Open System Preferences.
 - b. Open Security & Privacy.
 - c. Restart the MacOS device.
 - d. Log into Pulse Secure.
8. After Pulse Secure VPN is successfully installed on a MacOS device, the system will display a prompt, "Do you want to move the 'Pulse Secure Application Launcher' Installer to the Trash?". What is the next step?
 - a. Select 'Keep'.
 - b. Select 'Move to Trash'.
 - c. Restart the MacOS device to complete installation.
 - d. Log into Pulse Secure VPN.

9. The CAB file used to fix Slow VPN Issues on Zbook G5 was developed by _____.
- a. Microsoft
 - b. Apple
 - c. Google
 - d. Zbook
10. At Sunrun, which VPN service did Pulse Secure VPN replace on October 7, 2021?
- a. Cisco Anyconnect
 - b. Citrix Netscaler
 - c. Global Protect
 - d. Barracuda

Course: Policies & Procedures

Module: Management Policies & Procedures

Welcome

For Sunrun's IT Service Delivery Team, the central aim of our work is to generate value through the use of technology. Managing this responsibility within Sunrun's IT environment involves many of the basic management functions, like asset management, employee support and software accounts.

Section 1 - Furloughed Worker Return

Tech Terms

- Furlough
- Customer Relationship Management (CRM)
- Salesforce
- Oracle (ERP)
- SOX Compliance
- Okta

- Unlocking Accounts

Knowledge Base Articles

- [Furloughed Worker Return - FAQ](#)

In-Call Videos/Recordings

- [Active Directory \(AD\) Locked Out - Zachary Beason](#)

Tier 1 Information - Furloughed Worker Return

Escalation: HRConnect@sunrun.com

Subject Matter Expert (SME): N/A

Chat: Service Desk + HR Talent

Notes: N/A

Assessment

1. A _____ is a *mandated* absence from which the employee is expected to return to work or to be restored from a reduced work schedule after a period of time.
 - a. Furlough
 - b. Leave of Absence (LoA)
 - c. Termination
 - d. Transfer
2. _____ protects Sunrun's investors from fraudulent accounting activities.
 - a. IT Asset Management
 - b. SOX Compliance
 - c. Request Management
 - d. Oracle SIS
3. What application does a Tier 1 Service Desk agent use to determine if a Sunrun employee is 'active' or 'on leave'?

- a. Okta
 - b. SOX Compliance
 - c. Oracle
 - d. Salesforce
- 4. If an employee returning from furlough (or leave of absence) is 'active' but is unable to access Salesforce, what team should a Tier 1 Service Desk agent contact for help?
 - a. CRM Support
 - b. Service Desk Tier II - Applications
 - c. ServiceNow Administrators
 - d. Network Administrators
- 5. If an employee returning from furlough (or leave of absence) is 'active' but is unable to access Oracle, what requires the employee to submit a new request for access?
 - a. SOX Compliance
 - b. Leave of Absence (LoA) policy
 - c. Knowledge Base Article (KBA) requirements
 - d. IT Service Delivery restrictions

Section 2 - Leave of Absence Protocol

Tech Terms

- Active Directory (AD)
- Active Directory Organizational Unit (OU)
- Leave of Absence
- Single Sign-On (SSO)
- Workday

Knowledge Base Articles

- [Data Security - Leave of Absence Protocol](#)

In-Call Videos/Recordings

- [Leave Status - Ben Ehlinger_2021-08-24 - INC0409483](#)
- [Leave Status - Scott Cooley_2021-08-16 - INC0407202](#)

Tier 1 Information - Leave of Absence Protocol

Escalation: HRConnect@sunrun.com

Subject Matter Expert (SME): N/A

Chat: Service Desk + HR Talent

Notes:

- Employees are required to email leaves@Sunrun.com to inform them of their need for a leave of absence.
- Employees are required to contact Prudential, Sunrun's third party leave administrator to make a request for a leave.
- When an employee is out of work for a leave of absence, they must be fully relieved of their job duties. For this reason, system access will be suspended. It is recommended that employees turn on an out-of-office notification before their first day of leave.
- Once an employee's leave of absence has ended, they are required to contact their manager and leaves@Sunrun.com 48 hours prior to their first day back to work.

Assessment

1. To make a request for a Leave of Absence (LoA), who are Employees required to contact?
 - a. Prudential
 - b. Human Resources (HR)

- c. IT Service Delivery - Tier I
 - d. Sunrun's Company Physician
2. When a Sunrun employee takes a Leave of Absence (LoA), who will review that employee's leave or disability accommodation eligibility and prepare notices and documents that are sent to the employee?
- a. Prudential
 - b. Human Resources (HR)
 - c. IT Service Delivery - Tier I
 - d. Sunrun's Company Physician
3. When a Sunrun employee takes a Leave of Absence (LoA), who must the employee notify via email?
- a. leaves@sunrun.com
 - b. The manager
 - c. Talent Business Partner (Talent BP)
 - d. Prudential representative
 - e. IT Service Delivery - Tier 1
 - f. Mary Powell, Sunrun CEO
4. Upon return from Leave of Absence (LoA), an employee's status within _____ must be updated before any of the employee's account access can be reauthorized.
- a. Workday
 - b. Okta
 - c. Salesforce
 - d. ServiceNow
5. True or False: When an employee's status is updated upon return from Leave of Absence (LoA), a Tier 1 Service Desk agent will manually reactivate each of the employees accounts. (False: IT Service Desk does not manually reactivate accounts upon return from Leave of Absence/LoA)
6. What is the platform Sunrun uses to manage its employees' information?

- a. Workday
- b. Okta
- c. ServiceNow
- d. Salesforce

Section 3 - Oracle Account Management

Tech Terms

- Access Request (AR)
- Enterprise Resource Planning (ERP)
- Learning Experience Team (LXT)
- Oracle
- SOX Compliance

Knowledge Base Articles

- [Oracle Account Management](#)

In-Call Videos/Recordings

- [Oracle Account Management - Huseen Sufi](#)

Tier 1 Information -

Escalation: ERP Support, ERP Support SIS, ERP Support SRI, Tier II Service Desk

Subject Matter Expert (SME): Venkat Manda & Chris Prior

Chat: Diresales

Notes:

- Password Resets

- Users can reset passwords on their own by clicking Login Assistance > Password Reset. Otherwise, IT Service Desk agents may perform password resets.
- Account Not Found
 - If "Account Not Found" error message appears, locate the user account in SRI or SIS to confirm the account in Oracle.
 - If the user is listed as Inactive, the user needs to submit an access request (AR) to make the account Active again.
 - If the user is listed as Locked, the user should manually reset the password to unlock the account.
 - If no roles are assigned to the user, then an access request (AR) is required.
- Leave of Absence (LoA)
 - If user is returning from LoA, the following conditions must be met before the account can be reactivated in Oracle:
 - the user must request account update via incident (INC)
 - a manager approves the user's requested account update

Assessment

1. _____ protects Sunrun's investors from fraudulent accounting activities.
 - a. IT Asset Management
 - b. SOX Compliance
 - c. Request Management
 - d. Oracle SIS
2. Oracle is Sunrun's Enterprise Resource Planning (ERP) software. Which of the following Sunrun departments uses it?
 - a. Human Resources (HR)
 - b. Customer Care
 - c. Sales

- d. Information Technology (IT)
 - e. Field Operations (FieldOps)
 - f. Design Engineering
 - g. Marketing
- 3. Sunrun's _____ maintains and supports our back office applications and its infrastructure.
 - a. Enterprise Resource Planning Team (ERP)
 - b. Field Operations Team (FieldOps)
 - c. Learning Experience Team (LXT)
 - d. Project Operations
- 4. Once an Oracle Account access request (AR) has been approved, a Tier 1 Service Desk agent can search the appropriate Oracle instance for an existing account using _____ as search parameters.
 - a. %firstname and %lastname
 - b. firstname_lastname
 - c. *first_name*_*last_name*
 - d. %first_and_last_name%
- 5. All Oracle Account access requests (AR) must be submitted using the Oracle Account access request (AR) form found where?
 - a. ServiceNow
 - b. Workday
 - c. Okta
 - d. Oracle

Section 4 - Terminations & Transfers

Tech Terms

- Bettercloud
- Offboarding
- ServiceNow

Knowledge Base Articles

- [Managers Guide to Offboarding Employees - Technology FAQ](#)
- [Email Delegation for Terminated Employee - Request Process](#)
- [How to use the Termination and Transfer sheets](#)
- [Processing a Job Transfer/Position Change](#)
- [Emergency/Immediate Termination Process](#)

Video

- [Terminations & Transfers](#)

In-Call Videos/Recordings

- [Employment Transfer Support - Huseen Sufi](#)

Tier 1 Information - Terminations & Transfers

Escalation: HRConnect@sunrun.com, IT Service Desk - Tier II

Subject Matter Expert (SME): Adam Longmire, Nathan Murtie, Stephanie Larcom, Chris Prior, Dave Carroll, Stanley Loper

Chat: Service Desk + HR-Talent

Notes: N/A

Assessment

1. Managers have _____ to request Gmail inbox delegation for a terminated employee.
 - a. 20 days
 - b. 30 days
 - c. 60 days
 - d. 90 days
2. For how many days is Gmail inbox delegation for a terminated employee granted before the account is deleted?

- a. 30 days
 - b. 60 days
 - c. 90 days
 - d. 120 days
- 3. A manager cannot keep a direct report's laptop for the next employee. Why?
 - a. SOX Compliance
 - b. Asset Management
 - c. Health Department Regulations
 - d. IT Security Regulations
- 4. Which application initiates the transfer of a terminated employee's documents to his/her manager?
 - a. BetterCloud
 - b. Bomgar
 - c. Google Drive
 - d. Okta
- 5. When an employee is terminated, all Sunrun-issued workstations (Laptops, Chromebooks, Desktops) must be returned to IT Service Delivery within _____ business days.
 - a. 10
 - b. 30
 - c. 60
 - d. 90

Module: Operations Policies & Procedures

Welcome

Sunrun maintains established policies and procedures to guide its operations, strategy and workflow. Policies set the expectation for employee behaviors, and procedures outline the steps for it. This ensures consistency in practice and helps in maintaining quality output. Clearly defined policies and procedures keep employees on the same page while providing references for decision making, enabling everyone to behave in a legal, conscious and ethical manner.

Section 1 - Outages & After Hours On-Call Procedures

Tech Terms

- Brightpath
- Customer Relationship Management (CRM)
- IMP Chat
- Okta
- Salesforce
- Skedulo
- Sunrun Sales

Knowledge Base Articles

- [After Hours On Call Procedures](#)
- [IT Service Desk Outage Quick Reference Sheet](#)
- [IT Service Desk On-Call Schedule](#)

Video

- [After Hours On-Call Support](#)

In-Call Videos/Recordings

- [Reporting an Outage - Matthew McConnell](#)

Tier 1 Information - Outages & After Hours On-Call Procedures

Escalation: IMP Chat, CRM Support Team

Subject Matter Expert (SME): N/A

Chat: IMP Chat

Notes: N/A

Assessment

1. What is Sunrun's proprietary end-to-end automated software platform designed to manage home solar projects from lead to sale in one streamlined process?
 - a. Brightpath
 - b. Okta
 - c. Solaredge
 - d. SunrunNow
2. What three groups encompass Sunrun's Sales Team?
 - a. Channel Partner Sales
 - b. Direct Sales
 - c. Partner Sales
 - d. Retail Sales
 - e. Door-to-Door Sales
 - f. Inside Sales
3. Which Sunrun application supports Sunrun's installers as they manage, schedule, dispatch their work?
 - a. Skedulo
 - b. Solaredge
 - c. Brightpath
 - d. SunrunNow
4. What is IT Service Delivery's official process location for reporting IT Service Delivery outages that affect key functions such as network, applications or other services?
 - a. IMP Chat
 - b. IT - Site Support
 - c. Mobility
 - d. Network Admins

5. When a Sunrun employee contacts the IT Service Desk to report an outage, whom should the Tier 1 Service Desk agent email with information about the outage?
- a. emergencyCR@sunrun.com
 - b. outagereports@sunrun.com
 - c. servicedeliveryoutage@sunrun.com
 - d. escalations@sunrun.com
6. Sunrun employees who call the service desk hotline after regular business hours will be greeted with a recorded message advising them to press 4 if they are reporting an issue with Salesforce. The customer will then be transferred to another line monitored by which team?
- a. CRM Support Team
 - b. IMP Chat
 - c. IT - Site Support
 - d. Network Admins

Section 2 - IT Service Desk Phone Escalations

Tech Terms

- Escalation
- Incident
- Incident Management Process (IMP)
- IT Service Delivery Tier II - Hardware
- Okta
- Incident Management Process (IMP)
- Subject Matter Expert (SME)

Knowledge Base Articles

- [IT Service Desk Tier I Phone Escalation Process](#)
- [IT Service Desk Tier II - Hardware Phone Support](#)

- [Google Chat Communication Process](#)
- [Subject Matter Expert \(SME\) List](#)

In-Call Videos/Recordings

- [Phone Escalation - Zachary Beason](#)

Tier 1 Information - IT Service Desk Phone Escalations

Escalation: [Google Chat Communication Process](#)

Subject Matter Expert (SME): Lucas Wilcox, Sean Smith

Chat: N/A

Notes: N/A

Assessment

1. A(n) _____ in ServiceNow generates a record (or a “ticket”) that can be tracked until service is restored and the issue is resolved.
 - a. Incident
 - b. Request
 - c. Ticket
 - d. Task
2. Sunrun's IT Service Delivery _____ policy clarifies the boundaries and channels of decision-making throughout the ITSD Team in order to solve the problem quickly and with clarity.
 - a. Escalation
 - b. Incident
 - c. Access Request
 - d. Communication
3. Service Desk Personnel are responsible for performing basic Tier 1 support of Sunrun issued equipment and applications. Issues that cannot

be resolved within a maximum time of _____ are to be escalated in accordance with their priority level.

a. 30 minutes

b. 1 hour

c. 5 hours

d. 1 day

4. Sunrun's IT Service Phone Escalation Process defines Priority 4+ as
- a. An outage level event or the inability for an employee to continue to perform basic required job functions
 - b. An incident that minimally or moderately impacts an employee but does not affect the employee's ability work, even if in a degraded capacity
 - c. A full work stoppage that impedes an employee's ability to do his/her job
 - d. An employee's inability to log into a Sunrun-issued device
5. Within a Google Chat Rooms/Spaces, what information should *not* be included when starting a new thread?
- a. Incident Number
 - b. Priority
 - c. @mention SME
 - d. Timestamp
6. Who are the Tier II Subject Matter Experts (SMEs) for Salesforce (CRM)?
- a. Chris Prior
 - b. Eric Hirst
 - c. Michael Esparza
 - d. Stanley Loper
 - e. Dave Carroll

Section 3 - Lost or Stolen Equipment Procedures

Tech Terms

- Incident
- Incident Management Process (IMP)
- ServiceNow Incident Management
- IT Service Delivery Tier II - Hardware

Knowledge Base Articles

- [Lost/Stolen Equipment](#)

In-Call Videos/Recordings

- [Stolen Equipment - Steven Severin](#)

Tier 1 Information - Lost or Stolen Equipment Procedures

Escalation: IT Service Desk - Tier II Hardware

Subject Matter Expert (SME): Zach Miller

Chat: IT-SiteSupport

Notes: N/A

Assessment

1. True or False: Any user can record an incident and track it through the entire incident life cycle until service is restored and the issue is resolved.
(True)
2. Sunrun's _____ Team supports all layers of desktop engineering, including asset management, deployment and repair.
 - a. IT Service Delivery Tier II Hardware
 - b. IT Service Delivery Tier II Applications
 - c. IT Service Delivery Tier I
 - d. IT Service Delivery Tier III Core Services

3. Lost/stolen devices containing Sunrun data should be reported _____.
 - a. Immediately
 - b. Within 24 hours
 - c. Within 5 business days
 - d. Within 30 days
4. Customers who report lost/stolen computer assets should first complete a _____ form.
 - a. Information Security Incident
 - b. Lost/Stolen Asset
 - c. Affected CI
 - d. IT-Site Support Assignment
5. Customers who report lost/stolen mobility equipment should a _____ service request.
 - a. Replace Mobile Device
 - b. Lost/Stolen Asset
 - c. IT-Site Support Assignment
 - d. New Equipment

Module: Support Policies & Procedures

Welcome

Sunrun's Information Technology Service Delivery support policy includes information about the level of service that the ITSD Help Desk provides. The policy sets standards for the length of time technicians take to perform such tasks as resolving routine user issues, setting up new systems and ending network outages. Sunrun's service level policies also establish communication protocols for problems so severe that they can't be resolved within the specified time.

Section 1 - Google Group Management

Tech Terms

- Google Groups
- Group Management Policy

Knowledge Base Articles

- [Google Group Management Policy](#)
- [Adding people to a Google Group](#)
- [G-Suite Non-Human Accounts](#)
- [Google Groups Bulk Upload for Members](#)

In-Call Videos/Recordings

- [Google Group Support - Adrian Belzer](#)

Tier 1 Information - Google Group Management

Escalation: IT Service Desk Tier II - Applications

Subject Matter Expert (SME): Lucas Wilcox, Sean Smith

Chat: IT Service Desk

Notes:

- N/A

Assessment

1. True or False: In Google Groups, permissions are tied to the group rather than the individual members. (True)
2. Sunrun's _____ standardizes and simplifies the process of creating Google Groups and non-human accounts while eliminating discrepancies during group creation.
 - a. **Google Group Management Policy**
 - b. IT Service Desk - Tier 1 Policy
 - c. Data Security Policy
 - d. Google Workspace Policy
3. All requests for Google Group Management should be submitted as a(n)
 - a. Incident
 - b. Access Request

- c. Service Request
 - d. Change Request
- 4. Which application is used to create Google Groups with established default settings?
 - a. BetterCloud
 - b. ServiceNow
 - c. Meraki
 - d. Workday
- 5. True or False: Owners of non-human Google Group accounts can add or remove members on their own. (False: Owners of non-human accounts cannot add or remove people on their own.)

Section 2 - PDF Editor Escalation Policy

Tech Terms

- Adobe Acrobat Pro DC
- DocHub
- Nitro Pro

Knowledge Base Articles

- [PDF Editor Escalation Policy](#)
- [DocHub Help Center](#)

Videos

- [DocHub Overview](#)
- [DocHub - Edit PDFs](#)
- [DocHub - Create PDF Forms & Templates](#)
- [DocHub - Send & Receive Electronic Signatures](#)

In-Call Videos/Recordings

- [DocHub Support - Matthew McConnell](#)

Tier 1 Information - PDF Editor Escalation Policy

Escalation: Tier II - App Support

Subject Matter Expert (SME): Dave Carroll, Chris Prior

Chat: IT Service Desk

Notes: N/A

Assessment

1. According to Sunrun's PDF Editor Escalation Policy, in which departments are end users pre-approved for access to Adobe Acrobat Pro DC?
 - a. Accounting
 - b. Legal
 - c. Project Finance
 - d. Project Operations
 - e. Facilities
 - f. Direct Sales
 - g. Technology Operations
2. Which PDF editor does Sunrun utilize as a standard for its end users?
 - a. DocHub
 - b. Adobe Acrobat Pro DC
 - c. Nitro Pro
 - d. Adobe Acrobat Reader
3. To which IT Operations team should escalations for PDF editor provision be sent?
 - a. Service Desk - Tier I
 - b. Service Desk - Tier II
 - c. Network Operations

- d. Core Services
- e. Contact Center Technology (CCT)

Module: Security Policies & Procedures

Welcome

Sunrun's Information Technology Security policies and procedures identify the rules and procedures for all individuals accessing and using Sunrun-issued IT assets and resources. Sunrun's IT Security Policy is a model of its organizational culture, in which rules and procedures are driven from its employees' approach to their information and work.

Section 1 - Data Security

Tech Terms

- Active Directory
- File Path
- Network Administrator
- Okta
- Point of Contact (POC)
- Sunrun Security & Compliance
- Sunrun Learning Portal (Litmos)

Knowledge Base Articles

- [Data Security Lockout - Tier 1 Support](#)
- [Data Security - Network Share/Shared Drive Access](#)
- [Shared Drives Master List](#)
- [Shared Drives Exclusion List](#)

Video

- [Data Security](#)
- [Data Security Lockout](#)

In-Call Videos/Recordings

- [Data Security Lockout - Danny Mann](#)

Tier 1 Information - Data Security

Escalation: IT - Site Support, Network Admins

Subject Matter Expert (SME): Bre Lillybridge, Nathan Murtie, Jose Barragan

Chat: IT Service Desk

Notes:

- N/A

Assessment

1. _____ is a directory service developed by Microsoft for Windows domain networks. It is included in most Windows Server operating systems as a set of processes and services.
 - a. Active Directory (AD)
 - b. Pulse VPN
 - c. Sunrun Learning Portal (Litmos)
 - d. Network Administrator
 - e. Okta
2. Sunrun's _____ are responsible for keeping the organization's computer network up-to-date and operating as intended.
 - a. Network Administrators
 - b. IT Service Desk - Tier I Agents
 - c. Points of Contact (POCs)
 - d. IT Service Desk - Site Support Agents
3. What is the difference between a Shared Drive and Network Shares?
 - a. A Shared Drive is managed in Google Drive, and Network Shares are managed in Active Directory.

- b. A Shared Drive can involve an unlimited number of users, but Network Shares have limited membership capacity.
 - c. A Shared Drive provides unsecured access on the network, and Network Shares provide only secured access on the network.
 - d. There is no difference between the two.
- 4. Once the Network Share/Shared Drive approval process is complete, to whom should a Tier 1 Service Desk agent assign the ticket?
 - a. Network Administrators
 - b. Core Services
 - c. IT Service Delivery - Tier III Corporate Apps
 - d. IT Service Desk - Tier II
- 5. All employees, regardless of hiring organization, are required to complete Data Security Training within _____ of onboarding.
 - a. 30 days
 - b. 60 days
 - c. 90 days
 - d. 1 year
- 6. Employees who do not complete their Annual Data Security Training will
 - a. have their access to Sunrun Apps and services revoked until training is complete.
 - b. be terminated and then rehired when training is complete.
 - c. be given a 30-day extension to complete the training.
 - d. have the training requirement waived.
- 7. Where do Sunrun employees complete their Data Security Training?
 - a. Learning Portal
 - b. Salesforce
 - c. Workday
 - d. Oracle

Section 2 - Malware Response

Tech Terms

- Malware
- Local Area Network (LAN)
- Information Security (InfoSec)
- Sophos

Knowledge Base Articles

- [Malware Response Guide](#)

Video

- [Malware Response](#)

In-Call Videos/Recordings

- [Malware Response - Keldon Lopez](#)

Tier 1 Information - Malware Response

Escalation: IT - Site Support, Network Admins

Subject Matter Expert (SME): Sean Smith, Mitch Skillman, Mike Arbon

Chat: IT Service Desk

Notes: N/A

Assessment

1. In the event an end user reports suspected malware and/or a compromised Sunrun-issued device, the first step for a Tier 1 Service Desk agent is to _____.
 - a. Isolate the machine.
 - b. Power down the machine.
 - c. Close all windows.

- d. All of the above.
2. In the event an end user reports suspected malware and/or a compromised Sunrun-issued device, which of the following steps should a Tier 1 Service Desk agent *not* do?
- a. Isolate the machine.
 - b. Remove the device from Sunrun_Corp WiFi.
 - c. Power down the machine.
 - d. Close all windows.
 - e. Log into the device with a Network Admin account.
 - f. All of the above
3. Which Sunrun locations provide on-site IT support where end users can deliver a compromised device?
- a. San Francisco (SF)
 - b. San Luis Obispo (SLO)
 - c. Sacramento
 - d. Irvine
 - e. Scottsdale
 - f. Denver
 - g. All of the above
4. When a Tier 1 Service Desk agent submits a ticket to report suspected malware and/or a compromised Sunrun-issued device, what information should be included in the ticket description to ensure proper escalation?
- a. Employee Name
 - b. Device Serial Number (S/N)
 - c. Device Name
 - d. Asset Tag
 - e. All of the above

Course: Applications & Services

Module: Customer Support

Welcome

IT Customer Support includes a range of customer services to assist Sunrun's internal customers in making efficient and skillful use of technical resources available to them. It includes assistance in planning, installation, training, troubleshooting, maintenance and upgrading of devices and digital tools that customers need to be successful in their job roles.

Section 1 - BrightPath & Lightmile

Tech Terms

- AutoCAD
- BrightPath
- Customer Relationship Management (CRM)
- Incident
- Lightmile
- Triage

Knowledge Base Articles

- [BrightPath Queue Triage Procedures](#)
- [Service Desk - LightMile Support Training](#)

Videos

- [BrightPath Introduction](#)
- [BrightPath Queue Triage](#)

In-Call Videos/Recordings

- [BrightPath User Access - Scott Cooley](#)
- [Lightmile Access - Danny Mann](#)

Tier 1 Information - BrightPath & Lightmile

Escalation: All issues for BrightPath are escalated to IT Service Desk - Tier II & CRM Engineering Support.

Subject Matter Expert (SME): Matthew Tsugawa

Chat: Lightmile/BrightPath, DS-SFDC

Notes:

- Your ticket should include the following details:
 - The action you are trying to accomplish
 - The record you are performing the action on (URL, job code, opty id, project id, address, etc.)
 - Detailed steps to reproduce the action
 - The expected results of the action
 - The actual results or error (if they get an error)
 - Screenshots if available (Gather the info from the screenshot if it's not available)

Assessment

1. _____ is Sunrun's proprietary end-to-end automated software platform designed to manage home solar projects from lead to sale in one streamlined process.
 - a. BrightPath
 - b. Lightmile
 - c. Triage
 - d. AutoCAD
2. _____ is Sunrun's proprietary cloud-based automatic solar project design generation tool that allows users to create optimized designs interactively and without specialized training.
 - a. BrightPath
 - b. Lightmile
 - c. Triage

- d. AutoCAD
- 3. Tier 1 Service Desk agents should escalate all issues for BrightPath to _____.
 - a. IT Service Desk - Tier II
 - b. CRM Engineering Support
 - c. IT Service Desk - Tier I
 - d. Core Services
- 4. Which team does Tier 1 Service Desk support with the management and triage of BrightPath incidents?
 - a. CRM Engineering Support
 - b. Customer Care
 - c. Payroll
 - d. Procurement

Section 2 - CyberSource

Tech Terms

- Cache
- Cookies
- CyberSource

Knowledge Base Articles

- [CyberSource - Troubleshooting](#)
- [CyberSource - Account Creation & Deletion](#)

Video

- [CyberSource Training](#)

In-Call Videos/Recordings

- [CyberSource Account Support - Andrew Moore](#)

Tier 1 Information - CyberSource

Escalation: Service Desk - Tier II

Subject Matter Expert (SME): Nate Chapman, Chris Prior

Chat: N/A

Notes

- Service Desk no longer handles access requests or removals.
- The customer can manually reset the password. If that doesn't work, Service Desk agents should be able to log into Cybersource and verify the user has an account.
- Users typically have two accounts (wfgsunrun / wfgsunrundep).
- Sometimes, the password reset link does not work on the user end. In this case, Service Desk agents can log into CyberSource, delete the account and recreate it. This will force-send an activation email for the user's new account.
- For password reset:
 - Delete account and recreate it.
 - IT Organization ID: WFGSunrunach_acct
 - Website: <https://ebc2.cybersource.com/ebc2/>
- NOTE: Must have CyberSource account. In case of login issues, please log in and delete user and re-add user per role in CyberSource. (i.e Tier 1 agents should have only ServiceDesk as the role. Others will have Customer Care OR Customer Care & Collections)

Assessment

1. _____ is an E-commerce credit card payment system that Sunrun's customers use to process online payments, streamline online fraud management and simplify payment security.
 - a. **CyberSource**
 - b. Lightmile
 - c. BrightPath
 - d. AutoCAD
2. True or False: The majority of CyberSource account creation and deletion requests are generated automatically during employee onboarding and offboarding processes. (**True**)
3. True or False: Tier 1 Service Desk agents no longer support CyberSource access requests or removals. (**True**)
4. The first-time sign-in link for a newly created CyberSource account is valid for _____.
 - a. 1 hour
 - b. 6 hours
 - c. 12 hours
 - d. **24 hours**
 - e. 7 days
5. Which two Merchant ID accounts do CyberSource users typically have assigned to them?
 - a. **wfgsunrun**
 - b. **wfgsunrundep**
 - c. wfgsunrunach
 - d. ServiceDesk

Section 3 - Enphase Enlighten

Tech Terms

- Enphase

- Enlighten
- SolarEdge
- Solar Inverter

Knowledge Base Articles

- [Request Process for Enlighten Enphase or SolarEdge](#)
- [Enphase / Enlighten Office Creation](#)
- [Granting Customer Access to SolarEdge and Enlighten](#)

Videos

- [How does the Enphase microinverter work?](#)
- [Activating a Sunrun Solar Energy System with Enphase](#)

In-Call Videos/Recordings

- [Enlighten Enphase Login Support - Wesley Short](#)

Tier 1 Information -

Escalation: Enlighten Enphase & SolarEdge issues are escalated to Tier II App Support.

Subject Matter Expert (SME): N/A

Chat: N/A

Notes

- Tier I Service Desk supports Enlighten Enphase and SolarEdge in two ways:
 - account access.
 - adding an office in Salesforce.
- Both Enlighten Enphase and SolarEdge operate their own support desks that customers should contact for help.

Assessment

1. _____ developed the microinverter that is a key component of Sunrun's residential solar systems.
 - a. Enphase
 - b. Enlighten
 - c. CyberSource
 - d. BrightPath
2. _____ web-based application that allows solar power system owners to log in and remotely monitor their solar power production system.
 - a. Enphase
 - b. Enlighten
 - c. CyberSource
 - d. BrightPath
3. In what two ways do Tier 1 Service Desk agents support Enlighten and Enphase?
 - a. Account Access
 - b. Salesforce Office Additions
 - c. PPA Account Support
 - d. Fronius Account Creation
4. Tier 1 Service Desk agents should forward escalations for Enlighten and Enphase to _____.
 - a. IT Service Desk - Tier I
 - b. IT Service Desk - Tier II Applications
 - c. CRM Engineering Support
 - d. Core Services

Section 4 - UPS

Tech Terms

- Okta
- Single Sign-On (SSO)
- UPS CampusShip

Knowledge Base Articles

- [UPS - How to Ship Equipment](#)
- [Ordering UPS Shipping Supplies](#)

Videos

- [UPS Campus Ship - Bre](#)

In-Call Videos/Recordings

- [UPS Shipping Support - Ben Ehlinger](#)

Tier 1 Information - UPS & Shipping

Escalation: N/A

Subject Matter Expert (SME): N/A

Chat: N/A

Notes

- Tier I Service Desk uses UPS CampusShip when assisting customers who need to return equipment.
- Access UPS CampusShip at <https://www.campusship.ups.com/login/>
 - Username: SLOIT
 - Password: L3#0*5k

Assessment

1. _____ is Sunrun's centralized shipping process; it is accessed via an online portal for businesses shipping.
 - a. **UPS CampusShip**

- b. BrightPath
 - c. CyberSource
 - d. Enphase
- 2. True or False: When creating a shipping label, Tier 1 Service Desk agents should declare an estimated value for the item being shipped.
(False: A declared value should never be selected or provided.)
- 3. What is Sunrun's standard UPS shipping option/speed?
 - a. Ground Shipping
 - b. Overnight Shipping
 - c. Freight Shipping
 - d. International Shipping
 - e. Flat Rate Shipping

Section 5 - ClickMobile

Tech Terms

- ClickMobile
- Field Technician
- Service Set Identifier (SSID)

Knowledge Base Articles

- [How do I provision a Sentinel in Click Mobile?](#)

In-Call Videos/Recordings

- [Click - Keldon Lopez_2021-06-24_16 - INC0394355.mp4](#)

Tier 1 Information - ClickMobile

Escalation: N/A

Subject Matter Expert (SME): N/A

Chat: N/A

Notes:

- Tier 1 agents can reset and change ClickMobile passwords in correlation to Okta.
- Sometimes Active Directory password needs to be changed, but the agent would then would need to follow-up with OKTA reset too
- Tier 1 agents can also provide browser and device troubleshooting for ClickMobile.
- Confirm that the user can sign in to sunrun.okta.com with current credentials. If this fails, reset the user's password after verification of ID. If this is successful, and the user can sign in, direct the user to Click Support.
- [iOS Download](#) Steps
 - Please tap the download button below while on your iPhone.
 - Tap "Install" on the prompt. The screen will not refresh or give any confirmation. You can verify ClickMobile was installed by going to your homescreen and finding the ClickMobile app tile.
 - You must trust by going to Settings > General > Device Management > Vivint Solar Inc > select Trust "Vivint Solar Inc"
 - Navigate to Settings > Cellular and make sure that ClickMobile app is selected for Cellular Data usage.
 - Open ClickMobile and log in. (if required click on back arrow icon on Advanced Settings page) and log in.
 - Note: If 'Restore DB' pop up appears, select Cancel button on pop up
- [Android Download](#) Steps
 - Please click the download button below while on your Android phone.
 - Tap "Package installer" on the "open with" prompt.

- Tap "Settings" on the "security" prompt, then tap on the toggle next to "Unknown sources".
- Tap "OK" on the "unknown sources" prompt.
- Tap "INSTALL" at the bottom of the screen.
- You should now see ClickMobile on your application home screen.
- Open ClickMobile and log in.
- Note: If 'Restore DB' pop up appears, select Cancel button on pop up
- ClickMobile access can be submitted on The Source (help.sunrun.com) > IT Support > App Access > search Click > select Webclient Access.

Assessment

1. _____ is a scheduling and dispatch mobile application used to communicate with an end user's home office and peers using the Field Service Edge system.
 - a. ClickMobile
 - b. BrightPath
 - c. CyberSource
 - d. Enphase
2. Which sector of Sunrun's employees uses ClickMobile for its daily work responsibilities?
 - a. Field Services
 - b. Technology Operations
 - c. Payroll
 - d. Compliance
 - e. Marketing

3. When provisioning a Sentinel in ClickMobile, Sunrun's Field Service Technicians need a network's _____ to configure the device.
- a. Service Set Identifier (SSID)
 - b. Transmission Control/Internet Protocol (TCP/IP) Address
 - c. International Mobile Equipment Identity (IMEI) Number
 - d. Service Tag
 - e. Simple Network Management Protocol (SNMP)
4. A _____ at Sunrun handles on-site servicing, diagnostics and repairs for Sunrun's residential products and equipment.
- a. Field Services Technician
 - b. Tier 1 Service Desk agent
 - c. Home Office Manager
 - d. Customer

Section 6 - Sentinel Support

Tech Terms

- Sentinel
- Field Technician
- Photovoltaic (PV) System
- Service Set Identifier (SSID)
- Solar Inverter

Knowledge Base Articles

- [What is a Sentinel?](#)
- [Sentinel Support Home](#)
- [Service Desk Tier 1: Sentinel Support basic topics and info](#)
- [Sentinel Support: RMA Troubleshooting](#)

In-Call Videos/Recordings

- [Sentinel Support - Keldon Lopez](#)

Tier 1 Information - Sentinel

Escalation: Tier 2 - Dave Carroll

Subject Matter Expert (SME): Dave Carroll

Chat: Sentinel Support

Notes

- Sentinel Client - Sentinel.vivintsolar.com
- Tier 1 should include the following information in the escalated ticket:
 - Name of technician
 - Service Number
 - Serial Number
 - Why can't the field technician power on or connect the Sentinel?
- Before escalating the ticket, the Tier 1 agent should ask the field technician to power-cycle the inverter, the Sentinel or the customer router (if they have access). If they also have the customer WiFi credentials, see if they are able to connect with their mobile device (to verify connectivity).

Assessment

1. _____ is a communications gateway intended to improve Photovoltaic (PV) System communication for new installs and retrofit accounts. It connects to inverters & batteries via Ethernet, communicates with the customer's home router via WiFi and switches to cellular if connectivity is lost.

a. Sentinel

- b. BrightPath
 - c. CyberSource
 - d. ClickMobile
2. A _____ is a type of electrical converter that converts the variable direct current (DC) output of a solar panel into a utility frequency alternating current (AC) that can be fed into a commercial electrical grid or used by a local, off-grid electrical network.
- a. Solar Inverter
 - b. Sentinel
 - c. Photovoltaic (PV) System
 - d. Virtual Private Network (VPN)
3. A _____ is designed to supply usable solar power through an arrangement of solar panels and a solar inverter.
- a. Active Directory
 - b. Sentinel
 - c. Photovoltaic (PV) System
 - d. Lightmile
 - e. Virtual Private Network (VPN)
4. Sentinel connects to inverters and batteries via Ethernet, communicates with the customer's home router via WiFi, and switches to _____ if connectivity is lost.
- a. Cellular
 - b. Electricity
 - c. BrightPath
 - d. CyberSource
5. If a Field Services Technician contacts Sunrun's IT Service Desk needing contact information for Sentinel Support, a Tier 1 agent should direct him/her to call _____.
- a. (801) 823-1663

- b. (385) 715-6226
 - c. (555) 867-5309
 - d. (844) 809-3445
6. If a Field Services Technician contacts Sunrun's IT Service Desk needing contact information for support with CAD issues, a Tier 1 agent should direct him/her to _____.
- a. (801) 823-1663
 - b. (385) 715-6226
 - c. (555) 867-5309
 - d. (844) 809-3445
7. If a Field Services Technician contacts Sunrun's IT Service Desk needing support for a 'No S_Ok' error after connecting a Sentinel to a customer's WiFi, how should a Tier 1 agent resolve the issue without requiring access to Sentinel Support tools?
- a. Ask the Field Services Technician to run a comms test in SetApp.
 - b. Ask the Field Services Technician to call (801) 823-1663 for further assistance.
 - c. Email Tier II Application Support Specialists.
 - d. Ask the Field Services Technician to call back outside of Sentinel Support hours.

Section 7 - SolarEdge

Tech Terms

- Field Technician
- Modbus
- Photovoltaic (PV) System
- Sentinel
- SolarEdge

- Solar Inverter
- TCP/IP
- Workday

Knowledge Base Articles

- [Creating an Office in SolarEdge](#)
- [How do I read a comms test on a SolarEdge screenless inverter?](#)
- [How do I enable MODBUS on a SolarEdge screenless inverter using SetApp?](#)
- [Access Requests](#)

In-Call Videos/Recordings

- [SolarEdge Inverter Portal Support - Danny Mann](#)
- [SolarEdge SetApp Support - Danny Mann](#)

Tier 1 Information -

Escalation: Tier 2 Service Desk & fleetmonitoring@sunrun.com

Subject Matter Expert (SME): N/A

Chat: Diresales

Notes:

- Tier 1 agents should direct customers with login issues to use "Login Assistance, Password Reset" in SolarEdge.
- Tier 1 doesn't support SolarEdge directly.
- SolarEdge has its own support.
- Need SolarEdge Access? The Source (one.sunrun.com) > IT Support > App Access > search SolarEdge

Assessment

1. _____ is a communication protocol for transmitting information between electronic devices over serial lines or via Ethernet, and Sunrun uses it for SolarEdge communication automation.
 - a. Modbus
 - b. Photovoltaic (PV) System
 - c. Sentinel
 - d. Solar Inverter
2. _____ partnered with Tesla Motors to develop a storage and backup power solution used in Sunrun's residential systems.
 - a. SolarEdge
 - b. ClickMobile
 - c. CyberSource
 - d. BrightPath
3. What tool is used to enable MODBUS on a SolarEdge screenless inverter?
 - a. SetApp
 - b. Photovoltaic (PV) System
 - c. Sentinel
 - d. Solar Inverter
4. When customers contact Sunrun's IT Service Desk for help with SolarEdge login issues, a Tier 1 agent should _____.
 - a. Direct the customer to use "Login Assistance, Password Reset" in SolarEdge.
 - b. Call SolarEdge customer service.
 - c. Direct the customer to The Source (one.sunrun.com) > IT Support > App Access > search SolarEdge.
 - d. Escalate the ticket to Service Desk - Tier II Applications.
5. When customers contact Sunrun's IT Service Desk for a request for SolarEdge access, a Tier 1 agent should _____.

- a. Direct the customer to use "Login Assistance, Password Reset" in SolarEdge.
- b. Call SolarEdge customer service.
- c. Direct the customer to The Source (one.sunrun.com) > IT Support > App Access > search SolarEdge.
- d. Escalate the ticket to Service Desk - Tier II Applications.

Section 8 - Oracle ERP (SRI/SIS) Account Management

Tech Terms

- Accounts Receivable (AR)
- Applet
- Enterprise Resource Planning Team (ERP)
- Oracle
- Security Risk Intelligence (SRI)
- Strategic Information Systems (SIS)

Knowledge Base Articles

- [How to Create a New User in Oracle & Assign Responsibilities](#)
- [Oracle SRI Care Collection & AR Inquiry Resource Role Setup](#)
- [Oracle - Password Reset Instructions](#)
- [Oracle - Delegate Invoice and Requisition Approvals](#)
- [Oracle - Account Audit Procedures](#)
- [Oracle SIS Site IDs - Branch Name Identifiers](#)

Video

- [Oracle Account & Access Management - Michael Cole](#)

In-Call Videos/Recordings

- [Oracle Account Management - Huseen Sufi](#)

- [Oracle Password Assistance - Jeren Pyper](#)

Tier 1 Information - Oracle ERP (SRI/SIS)

Escalation: ERP Support, ERP Support SIS, ERP Support SRI, Tier II Service Desk

Subject Matter Expert (SME): Venkat Manda & Chris Prior

Chat: Diresales

Notes:

- Browser
 - Chrome OS - Oracle SRI/SIS can only be accessed via Virtualized Internet Explorer (more information provided in Section 9).
 - Windows & MacOS - Oracle SRI/SIS should be accessed via Internet Explorer.
 - Oracle SRI/SIS may be accessed via Chrome, Safari, Firefox with limited features.
 - Chrome provides limited access, but it won't open the Oracle application itself. Therefore, agents should direct users to Internet Explorer in general because most users need the full application.
 - ITSD does not support Safari or Firefox with the exception of basic browser troubleshooting (i.e., clear cache/cookies).
- Mac and Chromebook Users
 - If the user is unable to use the SSO Okta tile, the user must be provisioned the Virtualized Internet Explorer tile in Okta.
 - All devices must have Pulse installed and connected to access SRI/SIS.
 - Oracle version for Orange users: Version8u66
- Account Management

- Password Resets
 - Users can reset passwords on their own by clicking Login Assistance > Password Reset. Otherwise, IT Service Desk agents may perform password resets.
- Account Not Found
 - If "Account Not Found" error message appears, locate the user account in SRI or SIS to confirm the account in Oracle.
 - If the user is listed as Inactive, the user needs to submit an access request (AR) to make the account Active again.
 - If the user is listed as Locked, the user should manually reset the password to unlock the account.
 - If no roles are assigned to the user, then an access request (AR) is required.
- Leave of Absence (LoA)
 - If user is returning from LoA, the following conditions must be met before the account can be reactivated in Oracle:
 - the user must request account update via incident (INC)
 - a manager approves the user's requested account update

Assessment

1. _____ is Sunrun's Enterprise Resource Planning (ERP) software. It is integrated into and is used by many of Sunrun's departments, including Human Resources, Customer Care, Sales and Information Technology.
 - a. Oracle

- b. Sentinel
 - c. BrightPath
 - d. Enphase
2. Sunrun's _____ team is a division of its Engineering and Technology group that maintains and supports our back office applications and its infrastructure.
- a. Enterprise Resource Planning (ERP)
 - b. Security Risk Intelligence (SRI)
 - c. Strategic Information Systems (SIS)
 - d. Accounts Receivable (AR)
3. On a ChromeOS device, Oracle SRI/SIS can only be accessed via _____.
- a. Virtualized Internet Explorer
 - b. Internet Explorer
 - c. Chrome Browser
 - d. Safari Browser
4. When customers contact Sunrun's IT Service Desk for an Oracle password reset, a Tier 1 agent should _____.
- a. Direct the customer to reset the password on their own via Login Assistance > Password Reset.
 - b. Access Oracle via Virtualized Internet Explorer to reset their password.
 - c. Use the Oracle Single Sign-On (SSO) tile in Okta to login instead.
 - d. Submit a new access request (AR) for Oracle.
5. If a customer returning from Leave of Absence (LoA) contacts Sunrun's IT Service Desk for an Oracle account update, a Tier 1 agent should _____.

- a. Direct the customer to submit a ticket requesting an Oracle account update via incident (INC).
- b. Direct the customer to contact their manager for an Oracle account update.
- c. Direct the customer to update their Oracle account on their own via Oracle Assistance > Account Update.
- d. Access Oracle via Virtualized Internet Explorer to update their Oracle account on their own.

Section 9 - Oracle & Internet Explorer

Tech Terms

- Applet
- Graphical User Interface (GUI)
- Incident
- Oracle
- Virtual Web Browser (Internet Explorer)

Knowledge Base Articles

- [How to Resolve Oracle Error FRM-92101](#)
- [Configuring Java for Oracle SIS and SRI](#)
- [Configuring Windows 10 Devices for Oracle SIS Access](#)
- [Accessing Oracle SIS and SRI Virtualized IE for Oracle](#)
- [Oracle GUI Install for Mobile Web Applications \(MWA\)](#)
- [Internet Explorer - Clearing Cache and Cookies](#)

Video

- [Oracle & Internet Explorer - Wesley Short](#)

In-Call Videos/Recordings

- [Oracle, Internet Explorer & Java - Joe Falbo](#)
- [Oracle Mobile GUI - Huseen Sufi](#)

Tier 1 Information - Oracle & Internet Explorer

Escalation: Tier II Service Desk

Subject Matter Expert (SME): Chris Prior

Chat: N/A

Notes:

- Browser
 - Chrome OS - Oracle SRI/SIS can only be accessed via Virtualized Internet Explorer (more information provided in Section 9).
 - Windows & MacOS - Oracle SRI/SIS should be accessed via Internet Explorer.
 - Oracle SRI/SIS may be accessed via Chrome, Safari, Firefox with limited features.
 - Chrome provides limited access, but it won't open the Oracle application itself. Therefore, agents should direct users to Internet Explorer in general because most users need the full application.
 - ITSD does not support Safari or Firefox with the exception of basic browser troubleshooting (i.e., clear cache/cookies).
- Mac and Chromebook Users
 - If the user is unable to use the SSO Okta tile, the user must be provisioned the Virtualized Internet Explorer tile in Okta.
 - All devices must have Pulse installed and connected to access SRI/SIS.
 - Oracle version for Orange users: Version8u66

Assessment

1. The Oracle _____ is used for querying, browsing, editing, and managing Oracle databases.
 - a. Data Miner graphical user interface (GUI)
 - b. Virtual Web Browser
 - c. Java Applet
 - d. Incident
2. Oracle error FRM-92101 indicates a failure in _____.
 - a. Forms Server
 - b. Virtual Web Browser
 - c. Java Applet
 - d. Incident
3. To configure Java for Oracle SIS and SRI, a Tier 1 Service Desk agent should download and install _____ if it is not already installed.
 - a. J2SE Plugin version 1.8.0.66
 - b. Virtual Web Browser
 - c. Java Applet
 - d. Forms Server
4. End users can identify the Oracle instance they're using by examining _____.
 - a. Uniform Resource Locator (URL) in Virtualized Internet Explorer
 - b. CyberSource
 - c. J2SE Plugin version 1.8.0.66
 - d. Forms Server
5. Where can a Tier 1 Service Desk agent locate the Oracle GUI installer?
 - a. Google Shared Drives > Software > Oracle GUI
 - b. Uniform Resource Locator (URL) in Virtualized Internet Explorer
 - c. J2SE Plugin version 1.8.0.66
 - d. Forms Server

Module: Design & Development

Welcome

Design and Development applications enable Sunrun's internal customers to fulfill a process or to achieve an end goal. These apps support engineering projects, software development, communications efforts, video editing and graphic design, just to name a few. IT Service Desk agents provide customers with installation support, troubleshooting, updating and basic implementation of these applications.

Section 1 - AutoCAD

Tech Terms

- AutoCAD
- Okta

Knowledge Base Articles

- [AutoCAD - Service Desk Admin Guide](#)
- [AutoCAD - Individual License Activation](#)
- [AutoCAD - Multi-user License Activation](#)
- [Increased Timeout for CAD Server](#)
- [Application and Terminology Info](#)

In-Call Videos/Recordings

- [AutoCAD Support - Wesley Short](#)

TIER 1 INFORMATION - AutoCAD

Escalation: Tier II - Application Support

Subject Matter Expert (SME): Tier III Corporate Apps, Lucas Wilcox

Chat: IT Service Delivery

Notes:

- Users can email Support@ketiv.com for licensing and support.
- Used by the design and engineering team

- AutoDesk allows Tier 1 to look into accounts that have licenses attached.
- Requests for this app can be submitted via help.sunrun.com.
- If an issue is found where the application lags or does not open, uninstall and reinstall the latest version of AutoCAD from the shared drive. The user will then sign in with their creds.
- How do I get a license approved? If an AR has already been submitted, (please verify in SNow), reach out in IT Service Desk Tier II chat.

Assessment

1. _____ is a computer-aided tool that allows many different types of designers to create diverse kinds of drawings and designs.
 - a. AutoCAD
 - b. Oracle
 - c. Sentinel
 - d. ClickMobile
2. At Sunrun, which team uses AutoCAD in their daily work responsibilities?
 - a. Design & Engineering Team
 - b. Network Operations
 - c. IT Service Desk
 - d. Customer Care
3. Where can a Tier 1 Service Desk agent locate the latest version of AutoCAD for installation?
 - a. Google Shared Drive
 - b. Network Drive
 - c. AutoCAD.com/softwaredownloads
 - d. Contact Sunrun's Design & Engineering Team.

4. When customers contact Sunrun's IT Service Desk with a request for AutoCAD application access, a Tier 1 agent should _____.
 - a. Direct the customer to submit an access request (AR) via help.sunrun.com.
 - b. Call AutoCAD customer support.
 - c. Find the latest version of AutoCAD in the Google Shared Drive, and install it for the customer.
 - d. Direct the customer to contact Sunrun's Design & Engineering team to request access.
5. For AutoCAD licensing and support, end users should _____.
 - a. Submit an access request (AR) via helpdesk.sunrun.com.
 - b. Email support@ketiv.com.
 - c. Find the latest version of AutoCAD in the Google Shared Drive, and install it first.
 - d. Contact Sunrun's Design & Engineering team.

Section 2 - Jira

Tech Terms

- Jira
- DevOps
- Okta

Knowledge Base Articles

- [Access Requests](#)
- [Application and Terminology Info](#)
- [Point of Contacts](#)

Videos

- [Jira Introduction](#)

- [Jira Overview - Wesley Short](#)

In-Call Videos/Recordings

- [Jira Support - Andrew Kecso](#)

Tier 1 Information - Jira

Escalation: Tier II - Application Support

Subject Matter Expert (SME): Tier II - Applications; Amber Always

Chat: N/A

Notes:

- Tier 1 does not have access to Jira.
- Access Request for Jira is on The Source (help.sunrun.com) > IT Support > App Access > search Jira.

Assessment

1. When customers contact Sunrun's IT Service Desk with a request for Jira access, a Tier 1 agent should _____.
 - a. Direct the customer to submit an access request (AR) via [help.sunrun.com > IT Support > App Access > search Jira > Jira Access](#).
 - b. Call Jira customer support.
 - c. Find the latest version of Jira in the Google Shared Drive, and install it for the customer.
 - d. Direct the customer to contact Sunrun's DevOps team to request access.
2. At Sunrun, which team uses Jira in their daily work responsibilities?
 - a. Design & Engineering
 - b. Network Operations
 - c. IT Service Desk

d. DevOps

3. To which team should a Tier 1 Service Desk agent escalate tickets for Jira issues?
- a. IT Service Desk - Tier II Application Support
 - b. IT Service Desk - Tier II Hardware
 - c. DevOps
 - d. Network Operations
4. True or False: Tier 1 Service Desk Agents do not have access to Jira.
(True)

Section 3 - UiPath

Tech Terms

- UiPath
- Robotic Process Automation (RPA)
- Okta

Knowledge Base Articles

- [Access Requests](#)
- [Application and Terminology Info](#)
- [Point of Contacts](#)

Videos

- [UiPath](#)

In-Call Videos/Recordings

- [UiPath Support - Adam Davis](#)

Tier 1 Information - UiPath

Escalation: N/A

Subject Matter Expert (SME): N/A

Chat: N/A

Notes:

- The Service Desk does not provide support for UiPath or RPA at this time.
- If employees contact the Service Desk for support of UiPath or RPA, advise them to email Sammy Murray who is managing setup and installation of applications as required.

Assessment

1. _____ is a robotic process automation platform for end-to-end high-scale automation.
 - a. UiPath
 - b. AutoCAD
 - c. Jira
 - d. SolarEdge
2. _____ is a software technology that makes it easy to build, deploy, and manage software robots that emulate human actions interacting with digital systems and software.
 - a. Robotic Process Automation (RPA)
 - b. AutoCAD
 - c. Sentinel
 - d. Enphase

[Section 4 - Orion Looker](#)

Tech Terms

- Orion Looker
- Business Intelligence (BI)

- Okta

Knowledge Base Articles

- [Orion Looker](#)
- [Orion Looker - Beginner Training](#)
- [Orion Looker - Intermediate Training](#)
- [Sample Metrics Report](#)

Videos

- [Looker Overview](#)
- [Welcome to Looker](#)

In-Call Videos/Recordings

- [Looker - Adrian Belzer_2021-11-02 - INC0430475](#)

Tier 1 Information - Orion Looker

Escalation: Sunrun BI (Looker) Support

Subject Matter Expert (SME): Chandra Alluri

Chat: Sunrun BI (Looker) Support

Notes:

- Tier 1 Service Desk Agent Notes
 - Orion Looker is completely dashboard-based.
 - Sometimes specific dashboards are lost due to role/job/title change; in this case, the end user must submit another request and specify which dashboard they need to access. Login is not affected in this case, only dashboards.
 - Okta tile for Looker will only appear after a user has been provisioned access to at least one dashboard.

- Poor internet speed will lag loading time, which causes dashboard(s) to fail.
- Beyond access requests and basic browser troubleshooting, the Service Desk does not provide in-depth support for Orion Looker.
- From Sunrun's [Business Intelligence \(BI\) Team](#):
 - *Looking to Initiate a Reporting / Analytics Project or Enhancement or need Looker Access? It's easy! Submit a ticket, or email it-bi-fte@sunrun.com and we will reach out to you.*
- Orion Looker Support via Google Hangouts: <https://hangouts.google.com/group/LQVgAF4gxep9YYGeA>
- Sunrun's Orion Analytics Login Page - <https://orion.sunrun.com/login>

Assessment

1. _____ is a tool that helps Sunrun's Construction Management, Operations and Sales teams develop insightful visualizations for solar components such as batteries and inverters.
 - a. Orion Looker
 - b. AutoCAD
 - c. UiPath
 - d. SolarEdge
2. _____ combines business analytics, data mining, data visualization, data tools and infrastructure and best practices to help organizations to make more data-driven decisions.
 - a. Business intelligence (BI)
 - b. Oracle
 - c. Salesforce
 - d. ServiceNow

3. Where should a Tier 1 Service Desk agent escalate tickets for Orion Looker issues?

- a. Sunrun BI (Looker) Support
- b. IT Service Desk - Tier II Applications
- c. Core Services
- d. Construction Management

Module: Productivity

Welcome

Productivity among Sunrun's internal customers is a crucial factor in the company's performance. Increasing productivity improves the company's ability to grow and scale in its mission to "Create a planet run by the sun". IT Service Desk agents support productivity applications that leverage contracts, produce documentation, improve communication, schedule appointments and manage projects.

Section 1 - PDQ Deploy

Tech Terms

- PDQ Deploy
- NICE Screen Agent

Knowledge Base Articles

- [Hardware Processes](#)
- [InContact - Screen Recording SOP and FAQs](#)

In-Call Videos/Recordings

- [PDQ Deploy Support - Wesley Short](#)

Tier 1 Information - PDQ Deploy

Escalation: Tier II - Applications

Subject Matter Expert (SME): N/A

Chat: N/A

Section 2 - Field Operations Resource Management (FORM)

Tech Terms

- FORM Operations Management
- Gantt Chart
- Okta

Knowledge Base Articles

- [FORM Support Documentation for Tier I Service Desk Agents](#)
- [FORM - iPhone Setup Guide](#)
- [FORM FAQs](#)
- [FORM - Field Operations Resource Management Guide](#)
- [FORM Resources Google Drive](#)

Videos

- [FORM Introduction - Wesley Short](#)
- [FORM Overview](#)

In-Call Videos/Recordings

- [FORM Support - Joe Falbo](#)

Tier 1 Information - FORM

Escalation: Tier II - Applications

Subject Matter Expert (SME): Todd Sells

Chat: IT Service Delivery, DS-SFDC

Notes:

- After troubleshooting all steps listed below, assign the ticket to FORM Support.
- Tier 1 Service Desk Troubleshooting
 - <https://docs.google.com/document/d/1tCvdD-2eWPSFeH8jYqEHyHjF1EHXpVDeLQ6vw7vdj34/edit>
 - FORM (or Field Service Lightning (FSL)) can only be accessed using a custom domain. The user can do this by clicking 'use custom domain' underneath and to the right of the log in button.
 - The domain is Sunrun.
 - The user will then go to log in using Okta SSO.
 - If the user sees that they are not provisioned the application, the user's Installation Coordinator will need to request access.
 - Access is granted to Foreman and Lead Installers/Installers. (This title must match in their Salesforce profile. If the title has not yet been updated, they may need to wait for the change to occur.)

Assessment

1. Sunrun's _____ use the FORM platform to guide daily tasks, automate data collection, manage communication and give leaders real-time intelligence for audits, inspections, compliance, safety and quality.
 - a. Foremen and Lead Installers
 - b. Design & Engineering Teams
 - c. Tier 1 Service Desk Agents
 - d. Customer Care Agents

2. A _____ is a type of bar chart that illustrates a project schedule while also showing the dependency relationships between activities and the current schedule status.
 - a. Gantt chart
 - b. Scheduling Chart
 - c. PDQ Deployment
 - d. CyberSource
3. What mobile application supports Field Operations Resource Management (FORM)?
 - a. Field Service Lightning
 - b. AutoCAD
 - c. Jira
 - d. UiPath
4. To which team should a Tier 1 Service Desk agent escalate issues related to Field Operations Resource Management (FORM)?
 - a. IT Service Desk - Tier II Applications
 - b. IT Service Desk - Tier I
 - c. IT Service Desk - Tier II Hardware
 - d. Core Services

Section 3 - Skedulo

Tech Terms

- Customer Relationship Management (CRM)
- Salesforce
- Skedulo
- Single Sign-On (SSO)

Knowledge Base Articles

- [Skedulo - How to Login](#)

- [After Hours On Call Procedures](#)
- [CRM Queue Triage Process](#)

Videos

- [Skedulo Overview](#)

In-Call Videos/Recordings

- [Skedulo Support - Andrew Kecso](#)

Tier 1 Information - Skedulo

Escalation: Assignment Group - Skedulo Support

Subject Matter Expert (SME):

- Vincent Calabrese
 - Vincent.Calabrese@sunrun.com
 - Workforce Planning Analyst
 - Direct Retail Sales - 3800
- Charles Voth Sr.
 - charles.voth@sunrun.com
 - Workforce Planning Manager
 - Direct Retail Sales - 3800

Chat: N/A

Notes:

- If you need further help, assign to Skedulo Support in ServiceNow.
- Tier 1 Service Desk Agents support Skedulo's application functionality.
 - If a user is unable to sign into Skedulo, use Skedulo Login KBA.
- Skedulo must be logged into using a custom domain.
 - The user can do this by clicking use custom domain underneath and to the right of the login button.

- The domain is Sunrun.
- The person will then go to log in using Okta SSO.

Assessment

1. _____ is Sunrun's mobile workforce management solution used to manage processes like assigning and scheduling work orders, dispatching workers to new assignments, communicating with field workers on the job, managing product inventory and collecting data from the field.
 - a. Skedulo
 - b. Field Operations Resource Management (FORM)
 - c. PDQ Deploy
 - d. UiPath
2. What custom domain is used for an initial login to Skedulo?
 - a. <https://Sunrun.my.salesforce.com>
 - b. <https://Sunrun.my.service-now.com>
 - c. <https://Sunrun.my.active-directory.com>
 - d. <https://Sunrun.my.okta.com>
3. To which ServiceNow Assignment Group should a Tier 1 Service Desk agent escalate issues with Skedulo?
 - a. Skedulo Support
 - b. ServiceNow
 - c. Salesforce
 - d. IT Service Desk - Tier II

Section 4 - Cobblestone

Tech Terms

- Cobblestone
- Computer-Aided Design (CAD)
- Single Sign-On (SSO)

Knowledge Base Articles

- [What is Cobblestone?](#)
- [FAQs for Cobblestone](#)
- [Cobblestone multi-image upload/ How to set the Default Photos App](#)

Videos

- [Cobblestone Introduction - Wesley Short](#)
- [Cobblestone Overview - Keldon Lopez](#)

In-Call Videos/Recordings

- [Cobblestone Support - Danny Mann](#)

Tier 1 Information - Cobblestone

Escalation: Tier II - Applications

Subject Matter Expert (SME): N/A

Chat: N/A

Notes:

- Vivint Solar (Orange) Design tool, used by the CAD/Design Team for designing solar panels on rooftops.
- Access Request can be found on The Source (help.sunrun.com) > IT Support > App Access > search Cobblestone.
- Login is managed by Okta credentials.
- Troubleshooting is web-based (i.e., clearing cache & cookies, flush DNS, try another browser, etc.)

Assessment

1. _____ is Sunrun's in-house online design software for the CAD department to assist with designing and calculating systems for customers' houses.
 - a. Cobblestone
 - b. Skedulo
 - c. Orion Looker
 - d. PDQ Deploy
2. _____ is the use of computers to aid in the creation, modification, analysis or optimization of a design.
 - a. Computer-aided design (CAD)
 - b. UiPath
 - c. Jira
 - d. SolarEdge
3. Which Sunrun team uses Cobblestone when designing solar panels on rooftops?
 - a. CAD/Design Team
 - b. IT Service Desk - Tier II Applications
 - c. Foremen & Lead Installers
 - d. Customer Care
4. Which Sunrun platform manages a user's Cobblestone login?
 - a. Okta
 - b. ServiceNow
 - c. Oracle
 - d. Orion Looker

Section 5 - BarTender

Tech Terms

- BarTender
- Commander

- Remote Desktop

Knowledge Base Articles

- [BarTender - Installation & Activation](#)
- [BarTender - Label Printing](#)
- [Bartender Installation Files](#)
- [Service Desk - Tips and Tricks \(Various Applications\)](#)

Videos

- [Bartender Overview](#)

Tier 1 Information - BarTender

Escalation: Tier II - Applications

Subject Matter Expert (SME): Chris Prior

Chat: IT Service Delivery

Notes:

- The installation file for BarTender can be found in Team drive
ITSD>Software>BarTender

Assessment

1. _____ is Sunrun's label design software for designing, creating and printing labels with images, text, barcodes and RFID tags.
 - a. BarTender
 - b. PDQ Deploy
 - c. Orion Looker
 - d. Skedulo
2. Which Sunrun platform generates the .xml file that pairs with BarTender to create label templates?
 - a. Oracle

- b. PDQ Deploy
 - c. SolarEdge
 - d. UiPath
3. Which of these printers uses BarTender to generate barcode labels for Sunrun's warehouse operations?
- a. Zebra
 - b. Hewlett Packard (HP)
 - c. Xerox
 - d. Canon
4. When downloading and installing BarTender Software, what is the preferred method for Tier 1 IT Service Desk agents to use?
- a. Seagull BarTender Support > Downloads
 - b. ITSD Google Drive > Software > BarTender
 - c. Service Now > Access Requests
 - d. help.Sunrun.com

Section 6 - DocHub

Tech Terms

- DocHub
- Portable Document Format (PDF)

Knowledge Base Articles

- [DocHub - Employee Usage Guide](#)
- [DocHub Help Center](#)

Videos

- [DocHub Overview](#)

Tier 1 Information - DocHub

Escalation: Tier II - Applications

Subject Matter Expert (SME): N/A

Chat: N/A

Notes:

- DocHub is a free PDF editor that provides nearly all the same features of Adobe Acrobat DC. Unless a customer needs Adobe Acrobat DC (paid professional version), IT Service Desk will strongly recommend DocHub.
- If Adobe Acrobat DC (paid professional version) is absolutely necessary, a request is required and will be considered with a good business case.
 - What constitutes a “good business case”? Essentially any reason that doesn’t allow the caller to use the free version. These differences among versions are listed in [KB0010136: DocHub Employee Usage Guide](#).

Section 7 - Dizzion

Tech Terms

- Active Directory
- Desktop as a Service (DaaS)
- Dizzion
- Okta
- Thin Client
- Virtual Desktop Infrastructure (VDI)
- Virtual Machine (VM)
- VMware Horizon

Knowledge Base Articles

- [Distribution Process for Dizzion Devices](#)

- [Dizzion Admin Console](#)
- [Performing a Remote Session in Dizzion](#)
- [Access Requests](#)
- [InContact - Screen Recording SOP and FAQs](#)

Videos

- [Dizzion Overview](#)
- [Dizzion: Virtual Desktops Redefined](#)
- [Dizzion - Wesley Short](#)

In-Call Videos/Recordings

- [Dizzion Support - Adam Davis](#)

Tier 1 Information - Dizzion

Escalation: Tier II - Applications

Subject Matter Expert (SME): Michael Esparza, Eric Hirst

Chat: N/A

Notes:

- Dizzion is used by offshore employees (India, Colombia, Philippines, etc.) for telecommunication/softphone purposes. They utilize a Virtual Machine (VM) imaged as Windows OS from a server.
- Dizzion devices do not offer limited processing power and local storage (much like a thin client).
- Tier 1 Agents can reset the physical device or the virtual session via VMWare Horizon Client.
- With the end-user's name, a Tier 1 Agent can search for the Dizzion device in VMWare Horizon Client.

- Tier 1 Agents can log into Dizzion devices remotely using Bomgar; however, user permissions cannot be elevated to admin in a remote session.
- If admin credentials are needed for installation or changes, the issue should be escalated to Tier II - Applications, along with any issues concerning the Dizzion device's available storage.
- If the issue lies with the Dizzion device's local hardware or connectivity, offshore employees have a local IT Support Team that can troubleshoot these issues for them.

Section 8 - MyFax (eFax)

Tech Terms

- Access Request (AR)
- Distribution List
- Fax
- MyFax
- Subject Matter Expert (SME)

Knowledge Base Articles

- [MyFax \(eFax\) User Guide](#)
- [Using MyFax](#)
- [MyFax Account Creation for Administrators](#)
- [eFax Employee Usage Guide](#)
- [eFax Instructions](#)

Videos

- [MyFax \(eFax\) Demonstration](#)
- [MyFax \(eFax\) Training](#)

In-Call Videos/Recordings

- [MyFax \(eFax\) Support - Adrian Belzer](#)

Tier 1 Information - MyFax (eFax)

Escalation: Hardware Escalation

Subject Matter Expert (SME): ITSD Subject Matter Experts (SMEs)

Chat: IT Service Delivery, Hardware Escalation

Notes: N/A

Section 9 - Java

Tech Terms

- Applet
- Exception Site List
- Instance
- Internet Explorer (IE)
- Java
- Java Control Panel
- Key Management Service (KMS)
- Oracle
- MyFax
- Plug-in
- Security Risk Intelligence (SRI)
- Strategic Information Systems (SIS)
- Subject Matter Expert (SME)
- Uniform Resource Locator (URL)
- User Account Control (UAC)
- Windows Registry Editor (regedit)

Knowledge Base Articles

- [Configuring Java for Oracle SIS and SRI](#)
- [Configuring Windows 10 Devices for Oracle SIS Access](#)
- [Oracle - Disable Java Updates](#)
- [Prevent Java from Blocking the Oracle URL](#)

Videos

- [Java - Wesley Short](#)

In-Call Videos/Recording

- [Java Support - Huseen Sufi](#)

Tier 1 Information - Java

Escalation: ERP Support, ERP Support SIS, ERP Support SRI, IT Service Desk - Tier II

Subject Matter Expert (SME): Venkat Manda, Chris Prior (for Tier 1 issues)

Chat: Service Desk - ERP, IT Service Delivery

Notes

- The correct version of Java (version 8 u 66) must be installed in order to access Oracle SRI and SIS. This file can be found in the IT shared drive.
- If any other versions of Java are installed, Oracle will not work.
- Tier 1 Service Desk agents can check the Java version by searching on the task bar for Java then select 'About Java'.
- If there are other versions (including 8 u 66 (32 bit or 64 bit)), these must be removed using the Java uninstall tool which you can download from any browser search. Then install the one from the drive.

Section 10 - Printers

Tech Terms

- Active Directory (AD)
- Asset Tag
- BetterCloud
- BeyondTrust Remote Support (Bomgar)
- Chromebook
- Chrome Remote Desktop
- Control Panel
- Escalation
- Lightweight Directory Access Protocol (LDAP)
- Line Printer Daemon (LPD)
- MacOS
- Media Access Control (MAC) Address
- Meraki
- Multifunction Printer
- Nomenclature
- Oracle
- Print Queue
- Print Server
- Procurement
- Remote Support
- Secure Sockets Layer (SSL)
- Serial Number
- Server
- ServiceNow
- Service Tag
- Simple Network Management Protocol (SNMP)
- Transmission Control/Internet Protocol (TCP/IP)

- Universal Serial Bus (USB)
- Windows 10
- Xerox Device Agent (XDA)

Knowledge Base Articles

- [Enterprise Printer Support For Xerox and Canon Printers](#)
- [Printer - Offline due to SNMP](#)
- [How to get MAC address from a Printer](#)
- [Service Enhancement - Printer Service Support](#)
- [Sunrun Multifunction Printers 100%](#)
- [Windows 10 Printer Setup](#)
- [Set up Scan to Email \(Remote Office Printer\)](#)
- [Xerox Printer Troubleshooting/Configuration](#)
- [Adding Printer from the Print Server for a Remote Office](#)
- [Connecting ChromeBook to Printer 2021](#)
- [How to Add a Printer to a MacOS Device](#)
- [Chromebook - Printing](#)
- [Adding a User to a local Address Book](#)

Video

- [Creating a Xerox Address Book- Will Williams](#)
- [Printing to an Enterprise Printer](#)

In-Call Videos/Recordings

- [Mapping Blue Printers to Chromebooks - Danny Mann](#)
- [Printer Support - Nichole Margetts](#)

Tier 1 Information - Printers

Escalation: IT Service Desk - Tier II Desktop; Will Williams; Network Administrators

Subject Matter Expert (SME): Matt Haines, Mike Arbon, Andrew Moore, itnetworking@sunrun.com

Chat: IT - Site Support

Notes

- IT Service Desk Tier 1 Troubleshooting:
 - Make sure the computer and printer are both powered on and connected to the same network.
 - Office printers should be mapped through the print server, not mapped directly to the computer via the IP address. The reason being is because the print server pushes the correct drivers for the printer to the computer.
 - Do not install drivers directly from the printer manufacturer.
 - Printers should display any errors that they are experiencing (out of paper, paper jam, out of ink/toner, etc.) with self-diagnostics.
 - Sometimes the computer might be missing an OS update in order to assist with printing, so check for this.

Section 11 - Snipaste

Tech Terms

- Hotkey
- Snipaste
- System Tray
- Zipped Files (.zip)

Knowledge Base Articles

- [Snipaste - Install Guide](#)

In-Call Videos/Recordings

- [Snipaste Support - Scott Cooley](#)

Tier 1 Information - Snipaste

Escalation: N/A

Subject Matter Expert (SME): N/A

Chat: IT Service Desk

Notes

- IT Service Desk Tier 1 Troubleshooting:
 - Provide basic installation as outlined in Knowledge Base Article [\(KBA\) KB0010476 Snipaste - Install Guide](#)
 - If any issues arise when following these steps, Snipaste can also be installed from Microsoft Store

Module: Sales

Welcome

Sunrun's sales applications facilitate valuable training and also provide support for dealers, sales representatives and external customers. With these apps, sales representatives view their stats and manage electronic documentation for their customers. These apps also allow dealers to complete sales on Sunrun's behalf, and door-to-door sales representatives use these apps to utilize GPS and location services.

Section 1 - Crankwheel

Tech Terms

- Cache
- Chrome Extension
- Cookies
- CrankWheel
- NICE inContact

- Salesforce
- Security Personal Identification Number (PIN)
- Service Handler

Knowledge Base Articles

- [CrankWheel - Frequently Asked Questions](#)
- [InContact - CrankWheel Link with InContact Chat](#)
- [Google Chrome - Protocol Handlers](#)
- [CrankWheel Zen Desk - FAQ](#)
- [Chrome Web Store - CrankWheel extension](#)

In-Call Recording

- [Crankwheel Support - Chris Montoya](#)

Videos

- [CrankWheel Explained](#)
- [CrankWheel Quick Demo](#)
- [CrankWheel Screen Sharing](#)

Tier 1 Information - CrankWheel

Escalation: N/A

Subject Matter Expert (SME): N/A

Chat: IT Service Delivery

Notes:

- IT Service Desk Tier 1 Troubleshooting:
 - Google handler setting in Chrome browser: look for a “double diamond” icon on the far right side of the address bar for the new tab. Click it, then select “allow mail.google.com to open all email links.”

- Go into the settings by clicking the “I” icon on the left side of the address bar > Settings > Privacy and Security > Handlers > Allow sites to become default handlers for protocols. Or you can search for ‘Handlers’ in site settings.

Section 2 - Dealer Portal

Tech Terms

- Dealer Program
- Dealer Portal
- Dealer Stats
- Okta
- Tiled
- Microapp
- Masquerade

Knowledge Base Articles

- [Dealer FAQ](#)
- [Dealer Sales Representative Onboarding and Deactivation](#)
- [How to find the Dealer company Account Manager](#)
- [Dealer Password Reset](#)

Video

- [Dealer Portal - Overview](#)

In-Call Videos/Recordings

- [Dealer Account \(Escalation\) - Keldon Lopez](#)
- [Dealer Okta Support - Keldon Lopez](#)

Tier 1 Information - Dealer Portal

Escalation: IT Service Desk - Tier II

Subject Matter Expert (SME): Scott Cooley, Keldon Lopez

Chat: IT Service Delivery

Notes:

- Dealers (Vivint Solar/Orange side) are sales reps from other solar companies that are authorized to sell on behalf of Sunrun/Vivint Solar.
- IT Service Desk Tier 1 Troubleshooting:
 - same support provided to company sales reps
 - assist with sales applications
 - password resets
 - Okta account management
- Dealer accounts are managed through the Dealer-Okta tile through Okta.

Assessment

Section 3 - DocuSign

Tech Terms

- Adjustable Block Program (ABP)
- California Public Utilities Commission (CPUC)
- DocuSign
- Illinois (IL) Rebates
- Okta
- Salesforce

Knowledge Base Articles

- [Service Desk - Tips and Tricks \(Various Applications\)](#)
- [How to Add DocuSign to a User in Salesforce - Create your view](#)
- [Dealer Sales Representative Onboarding and Deactivation](#)
- [Access Requests](#)
- [SALESFORCE: How to's and general guides](#)
- [Guide of a list of possible errors and the action for Illinois \(IL\) Rebates](#)
- [DocuSign & ABP Automation \(Illinois Only\)](#)
- [Collect CPUC Signatures](#)

Videos

- [DocuSign - How it Works](#)
- [DocuSign - How to Send a Document](#)

In-Call Videos/Recording

- [DocuSign Support - Huseen Sufi](#)

Tier 1 Information - DocuSign

Escalation: Tier II Service Desk

Subject Matter Expert (SME): Dave Carroll

Chat: IT Service Delivery

Notes:

- Access Request Process
 - Submit an access request (AR) in ServiceNow
 - Reach out in chat if the customer has issues logging in
 - Core Services processes access requests (ARs) for DocuSign.
- DocuSign Support Hotline
 - 1-866-219-4318
 - SF instance: 3952724
 - SLO instance: 633124

- Once access requests (ARs) have been approved, they need to be enabled. Follow these instructions to guide customers through the process:
 - Part 1
 - Email the person letting them know to login. When response is received, or the status profile is "Active" proceed to part 2.
 - Part 2
 - Find user in Okta and fix their provisioning error for DocuSign by clicking edit and then saving. (No actual changes are made.)
 - DocuSign
 - Go to admin in the top bar
 - Users
 - Search user
 - Add Perms and Groups from mirror

Section 4 - Doors

Tech Terms

- Canvassing
- Doors
- Location Services

Knowledge Base Articles

- [Doors FAQ](#)
- [Dealer FAQ](#)
- [Dealer Downloads & Applications](#)

Videos

- [Sunrun Training on VSLR Apps](#)
- [Neo & Doors Overview](#)

In-Call Videos/Recordings

- [Doors Support - Andrew Kecso](#)

Tier 1 Information - Doors

Escalation: Tier II Service Desk

Subject Matter Expert (SME): Michael Esparza, Dave Carroll, Stanley Loper

Chat: IT Service Delivery

Notes:

- Doors is an application within Neo/SPlat that works similarly to Google Maps
 - used to look up addresses
 - provides information on potential customers
- Sales Reps use this with their respective Sales Applications when selling door-to-door.
- For a mobile device, Location Services setting has to be set to "On" in order to utilize GPS.
- How you can check if a sales representative has access to Doors:
 - Dealer Portal -> Company Management -> Select Company -> There will be a green bubble with a check mark or a red bubble with an x indicating access to Doors

Section 5 - Egencia

Tech Terms

- Egencia
- Field Sales Consultants (FSC)
- Field Technician

Knowledge Base Articles

- [Service Desk - Tips and Tricks \(Various Applications\)](#)
- [Egencia Quick Start Guide](#)
- [Field Operations Traveling Guide](#)
- [Sunrun Travel & Expense Reimbursement Policy](#)

Videos

- [Egencia - Overview](#)

In-Call Videos/Recordings

- [Egencia Support - Scott Cooley](#)

Tier 1 Information - Egencia

Escalation: travel@sunrun.com

Subject Matter Expert (SME): N/A

Chat: IT Service Delivery

Notes:

- Egencia is accessed via the 'Corporate Travel' tile in Okta
- All Sunrun corporate travel must be booked through Egencia.
- Please encourage customers to reference the Egencia Start Guide for additional information and details.
- App Store - [Egencia iOS App Download](#)
- Google Play - [Egencia App Download](#)

Section 6 - League Live

Tech Terms

- League Levels
- League Live
- League Store (Locker Room)
- Spark Academy
- Watt Games

Knowledge Base Articles

- [Slide Deck: The League](#)
- [Viewing Stats in League Live](#)

Videos

- [Sunrun - The League](#)
- [League Live - What is it?](#)
- [League Live Overview](#)

In-Call Videos/Recordings

- [League Live Support - Scott Cooley](#)

Tier 1 Information - League Live

Escalation: N/A

Subject Matter Expert (SME): N/A

Chat: DS-League Live

Notes:

- League Live is an application designed for the Sales Team and sales reps to view their stats.
- Accounts made in the sales representative's sales application have to fit a certain criteria or prerequisite for the account to count towards their stats.

- In League Live, users can see how well they are doing compared to other sales reps, view leaderboards, etc.
- Access to League Live can be located here:
 - The Source/"help.sunrun.com" > IT Support > App Access > search League Live
- The mobile application can be located here:
 - The Source > IT Support > Downloads > League Live
- Sign in is managed by Okta.
- Typical calls/tickets for League Live are from sales representatives who are unable to view certain stats or don't see accounts that should count towards them
 - in this case, Tier 1 Service Desk agents should verify via Salesforce to see if the account met its prerequisites.
- Tier 1 Service Desk Troubleshooting:
 - uninstall/reinstall the mobile application (this should refresh its pull from Salesforce)
 - Tier I used to have the ability to masquerade as Sales Reps, but this is a Tier II role now.
- League Store
 - All support-related questions on orders placed, or problems with the store should be communicated through a store ticket. Tickets can be placed by clicking the button in the bottom right hand corner of the store.
 - For questions on a particular order, sales representatives should reference that order number. The order numbers can be found in the store profile section of the store by clicking on the customer's name.
 - All orders can be tracked in the sales representative's store profile by clicking on their name and the particular order

they're trying to track. They can also set up FedEx alerts to notify them where their package is in the delivery process.

- Sales representatives will only have access to the Store Sections that they have been assigned. They can make personal card transactions using a personal card to purchase items in the store, even without credits in their account.

Section 7 - Mercury

Tech Terms

- Access Request (AR)
- Cache
- Cookies
- Masquerade
- Mercury
- Salesforce

Knowledge Base Articles

- [Mercury FAQ](#)
- [Mercury Permissions](#)
- [Adding Oversight rights in Mercury under the Sales Org](#)
- [Mercury Tab Access](#)

Videos

- [Mercury Overview](#)

In-Call Videos/Recordings

- [Mercury Support - Keldon Lopez](#)

Tier 1 Information - Mercury

Escalation: IT Service Desk - Tier II

Subject Matter Expert (SME): Michael Esparza, Dave Carroll, Stanley Loper

Chat: DS-Mercury

Notes:

- Mercury is a read-only, limited-view of Vivint Solar (Orange) Salesforce.
- Mercury exists so that end users can view Salesforce when their job title doesn't allow them access to the full version of Salesforce or allow them to edit it.
- Access Requests for Mercury can be located here:
 - The Source or help.sunrun.com > IT Support (drop down menu) > App Access > search Mercury > submit an Access Request (AR) ticket
- Mercury's URL is mercury.vivintsolar.com and its login is managed by Okta.
- Tier 1 Service Desk Troubleshooting includes:
 - Does the customer have access?
 - No? Submit an Access Request (AR).
 - Yes? Try Okta credentials. If Okta credentials do not work, try Okta password reset.
 - Since Mercury is web-based, try web-based troubleshooting, or try another browser.

Section 8 - Neo

Tech Terms

- Cache
- Cookies

- Masquerade
- Mercury
- Neo
- Salesforce

Knowledge Base Articles

- [Neo FAQ](#)
- [Introduction to Neo](#)
- [Viewing Holds & Cases in Neo/Salesforce](#)
- [Installing Neo](#)

In-Call Videos/Recordings

- [Neo Support - Danny Mann](#)

Tier 1 Information - Neo

Escalation: IT Service Desk - Tier II

Subject Matter Expert (SME): Michael Esparza, Dave Carroll, Stanley Loper

Chat: DS-Neo

Notes:

- Neo is now read only due to EOL at the end of 2021.
- All new leads are being created in Splat (outlined in the next section).
- Neo can be downloaded from help.sunrun.com> Downloads from the drop down.

Section 9 - Splat

Tech Terms

- Channel Partner
- Customer Portal
- Customer Relationship Management (CRM)
- Direct-to-Home (D2H)
- DocuSign
- Inside Sales Consultant (ISC)
- Masquerade
- Neo
- Okta
- Opportunity
- Retail Solar Advisor (RSA)
- SPlat (Sales Platform)
- Salesforce
- Sunrun Direct

Knowledge Base Articles

- [Blue Sales Support - Referral Process in Blue SF](#)
- [Blue Sales Support - CRP Process for Direct to Home\(D2H\) in Blue SF](#)

In-Call Videos/Recordings

- [SPlat Support - Nathan Murtie](#)

Videos

- [SPlat Overview](#)
- [SPlat Training](#)
- [SPlat - Address Lookup](#)
- [SPlat - Entering Customer Information](#)
- [SPlat - Setting an Appointment](#)
- [SPlat - New Features](#)

Tier 1 Information - SPlat (Sales Platform)

Escalation: IT Service Desk - Tier II

Subject Matter Expert (SME): Daniel Bell, Aaron Crosby, Chris Prior, Dave Carroll, Michael Esparza

Chat: IT Service Desk

Notes:

- SPlat (Sales Platform) is used in tandem with Salesforce.
- Important: Due to SOX and federal compliance issues, Tier 1 Service Desk agents have limited access to SPlat (Sales Platform).
- NEO users have been migrated to Splat for new leads and account creation for customers.
- Tier 1 Troubleshooting Steps:
 - attempt general troubleshooting
 - password reset
 - uninstall/reinstall of application on mobile device
 - check user profile within Salesforce.
 - Start a Bomgar session to see what user is experiencing, and gather the following:
 - Screen Shots
 - Error Messages
 - Opportunity (Oppty) #
 - Account #
 - Project IDs
 - Proposal IDs,
 - Customer Information (name/address/etc.)
 - Look in Blue Salesforce. What is the user trying to accomplish?

- Any issues with customer accounts, projects or opportunities are escalated to Tier II.

Section 10 - Tiled

Tech Terms

- Tiled
- Learning Management System (LMS)
- Learning Portal (Litmos LMS)
- Neo
- Okta
- Provisioning
- ServiceNow
- Tiled
- Workaround

Knowledge Base Articles

- [Intro to Tiled](#)
- [Tiled and Okta Integration](#)
- [Adding Groups and Offices to Tiled](#)
- [How to give access to a second instance of Tiled](#)

Videos

- [Tiled Microapps](#)
- [Tiled - How to Create a Microapp](#)

In-Call Videos/Recordings

- [Tiled Support - Zachary Beason](#)

Tier 1 Information - Tiled

Escalation: IT Service Desk - Tier II

Subject Matter Expert (SME): Dave Carroll, Stanley Loper, Chris Prior

Chat: Tiled issues

Notes:

- Tiled is used for Sunrun's Sales Representative and Dealer Sales Training.
- Tiled courses are a direct link from Learning Portal. If a user is having issues accessing a quiz that directly links to LMS, ask the user to open LMS in a separate tab and attempt quiz or completion again.
- Tiled access?
 - The Source > IT Support > App Access > search for Tiled
- Tiled login issues?
 - Check the customer's Okta, and redirect them to their tiles/apps.
 - If they are using the mobile application, the process should be:
 - vivintsolar.com or vivintsolar.okta.com for the domain > Sign in using SSO > Okta credentials.
 - Passwords are managed by Okta.
- Tiled training issues?
 - The easiest way to complete these sales trainings is through Okta on a desktop.
 - Tier 1 Service Desk agents can offer web-based troubleshooting if training courses are not uploading.
 - If training courses are still not completed after Tier 1 troubleshooting, redirect to manager or HR.

Module: Security

Welcome

Sunrun's security applications are designed to protect computer files, email, operating systems and program software, particularly on computers that are connected to networks or otherwise are subject to attack from outside locations. Security programs are designed to detect the effects of intrusive activity, identify malicious activity while it is occurring, look for vulnerabilities that might be exploited by an intruder or help prevent malicious activity.

Section 1 - PhishAlarm

Tech Terms

- PhishAlarm
- Phishing

Knowledge Base Articles

- [Email - Report Suspicious Emails](#)
- [Phishing Awareness within Email](#)

In-Call Videos/Recordings

- [PhishAlarm Support - Stephanie Larcom](#)

Videos

- [PhishAlarm - Demonstration \(.gif\)](#)
- [PhishAlarm - Overview](#)

Tier 1 Information - PhishAlarm

Escalation: ITSecurity@sunrun.com, PhishAlarm@sunrun.com

Subject Matter Expert (SME): N/A

Chat: N/A

Notes:

- Google has a built-in, malicious email reporting tool called PhishAlarm.

- If a Tier 1 Service Desk agent suspects that an email is malicious, they can select this tool in Gmail, and it will then flag/quarantine this email.
- You can also report this email to management or Security team.

Section 2 - Sophos

Tech Terms

- Active Directory
- Active Directory Users and Computers (ADUC)
- Bitlocker Recovery Key
- Domain Name
- Endpoint Security
- Group Policy Object (GPO)
- Hard Drive Encryption
- MacOS
- Malware
- Microsoft Windows
- Okta
- Sophos
- Task Manager
- Trusted Platform Module (TPM)

Knowledge Base Articles

- [Mac Sophos Hard Drive Encryption](#)
- [Windows Sophos Hard Drive Encryption](#)
- [Sophos Bitlocker Recovery error Troubleshooting](#)
- [Sophos Disk Encryption- Windows](#)
- [How to start a Sophos Windows Service](#)

- [BitLocker Troubleshooting Guide](#)

In-Call Videos/Recordings

- [Sophos Support - Joseph Turner](#)

Videos

- [Sophos Central - Overview](#)
- [Sophos & Malware Response](#)

Tier 1 Information - Sophos

Escalation: N/A

Subject Matter Expert (SME): Mike Arbon

Chat: DS-Hardware

Notes:

- Sophos is currently utilized for Vivint Solar (Orange) devices; Sunrun (Blue) devices use WorkspaceOne (WSO).
- When a user attempts to sign into a device incorrectly after too many attempts, the hard drive will lock to safeguard its data/information.
- When the hard drive locks, the device will ask for the Bitlocker Recovery Key.
- To unlock the drive, a key will have to be researched in Sophos
 - To find the key, you'll need to search via the PC Name or the End User.

Section 3 - SentinelOne

Tech Terms

- Active Directory
- Active Directory Users and Computers (ADUC)

- Bitlocker Recovery Key
- Domain Name
- Endpoint Security
- Group Policy Object (GPO)
- Hard Drive Encryption
- MacOS
- Malware
- Microsoft Windows
- Okta
- Sophos
- Task Manager
- Trusted Platform Module (TPM)

Knowledge Base Articles

- [Mac OS SentinelOne Installation & Sophos Uninstallation](#)
- [Sentinel One fix with Mojave OS](#)
- [SentinelOne Update Instructions - Legacy Orange MacOS](#)

In-Call Videos/Recordings

- [SentinelOne Support - Adam Davis](#)

Videos

- [SentinelOne - Introduction](#)
- [SentinelOne - How it Works](#)

Tier 1 Information - SentinelOne

Escalation: IT Service Desk - Tier II Hardware

Subject Matter Expert (SME): Sean Smith, Mitch Skillman

Chat: DS-Hardware

Notes:

- N/A

Assessment

1. A(n) _____ is a comprehensive security solution deployed on endpoint devices to protect against threats.
 - a. Endpoint Protection Platform (EPP)
 - b. Full Disk Access
 - c. Terminal
 - d. Malware
2. A(n) _____ is a highly secure format used to transmit sensitive information between two parties in a compact and self-contained manner.
 - a. Hard Drive Encryption
 - b. Endpoint Protection Platform (EPP)
 - c. Finder
 - d. Token
3. In the SentinelOne installation process, at which step should the site token be entered?
 - a. Introduction
 - b. Registration
 - c. Installation
 - d. Summary
4. When SentinelOne installation is complete, which Security & Privacy setting should be changed?
 - a. Accessibility
 - b. Full Disk Access
 - c. Files and Folders
 - d. Speech Recognition

5. To begin the process of uninstalling Sophos, where should you navigate to locate the Sophos folder?
- a. Applications
 - b. Utilities
 - c. iCloud Drive
 - d. Downloads
 - e. Desktop
6. Which MacOS version is most likely to experience corruption when SentinelOne is installed?
- a. Mojave
 - b. Catalina
 - c. Big Sur
 - d. Monterrey

Module: Telecom

Welcome

Sunrun's telecommunications support (telecom) encompasses a broad range of communication technology, including wireless, videoconferencing, virtual meetings, text messaging and web events. It also includes software applications that allow for recorded calls as well as the ability to connect teams and customers seamlessly.

Section 1 - Dialpad

Tech Terms

- Call Queue
- Chrome Extension
- Device Manager
- Dialpad
- Enhanced 911 (E911)
- iOS

- OBi IP Phone
- Okta
- Polycom
- Subfolder
- Transmission Control/Internet Protocol (TCP/IP)
- Voice over Internet Protocol (VoIP)
- Wi-Fi Protected Access Pre-Shared Key (WPA-PSK)

Knowledge Base Articles

- [DialPad for iOS](#)
- [How to activate Dialpad phone](#)
- [How to connect Dialpad phone to WiFi](#)
- [DialPad Downloads](#)
- [How to add \(Global Admins and Department/Call Queue Admins\) in Dialpad](#)
- [How To Create Users in Dialpad](#)
- [DialPad E911 Setup](#)
- [Adding a Polycom Phone to DialPad](#)
- [How to create a department/Call Queue in Dialpad](#)
- [How to Remove Dialpad Users](#)
- [Call Recording Requests for Legal](#)

Videos

- [Dialpad - Introduction](#)
- [Dialpad - Overview](#)

In-Call Videos/Recordings

- [Dialpad Support - Andrew Kecso](#)

Tier 1 Information - Dialpad

Escalation: IT Service Desk - Tier II

Subject Matter Expert (SME): Scott Cooley

Chat: IT Service Desk

Notes:

- Dialpad Softphone
 - operates much like a phone with VoIP
- Dialpad extension can be downloaded through Google Chrome
- Access provisioning:
 - Set up an account via Dialpad website with Sunrun employee email.
 - Create a login/password
- Tier 1 Service Desk Troubleshooting
 - web-based troubleshooting
 - clearing cache and cookies & reattempt login
 - perform a password reset through Dialpad's site if necessary

Section 2 - InContact

Tech Terms

- 64-bit vs. 32-bit
- After-Call Work (ACW)
- Agent Leg
- AppData
- Average Handle Time (AHT)
- Call Queue
- CAPTCHA
- InContact
- Integrated Softphone

- Microsoft Installer (MSI)
- My Agent eXperience (MAX Agent)
- PDQ Deploy
- Root Directory
- Salesforce
- ScreenAgent
- Task Manager
- WrapUp

Knowledge Base Articles

- [InContact - Screen Recording SOP and FAQs](#)
- [InContact Support - Stuck Agent/Contact](#)
- [InContact Support - Password Reset](#)
- [InContact MAX Agent User Guide](#)

Videos

- [InContact CXone - Introduction](#)
- [InContact - Integrated Softphone](#)
- [InContact - Admin](#)
- [InContact - Overview](#)

In-Call Videos/Recordings

- [InContact Support - Danny Mann](#)

Tier 1 Information - Nice InContact

Escalation: Contact Center Support, IT Service Desk - Tier II

Subject Matter Expert (SME): Dave Carroll, Erik Pace, Charlotte Salazar, Jesus Aguilar

Chat: IT Service Desk, InContact Chat

Notes:

- Tier 1 has access to unlock accounts within inContact.
- If a user has forgotten password, have them go to login.incontact.com and reset password.
- If a user is locked out, go to Admin> Search Username> Unlock.
 - If account does not show as locked, confirm with user.
- Get Access? SunrunNow > Request Something > search > InContact
- Troubleshooting is web-based:
 - Clear cache & cookies
 - Flush DNS
 - Reattempt login
 - Adjust browser Settings
- Releasing licenses for CXone/inContact:
 - Hover over red X in license error to get error message.
 - License Exceeded requires a ticket number and license key.
 - License Revoked requires ticket number, license key, and device name.
 - Reach out to Service Desk Chat for a team lead with above relevant info
 - If team leads are unavailable, make a new conversation in inContact chat

Section 3 - SpiceCSM

Tech Terms

- After-Call Work (ACW)
- Agent Leg
- Average Handle Time (AHT)

- Call Queue
- InContact
- Integrated Softphone
- My Agent eXperience (MAX Agent)
- ScreenAgent
- SpiceCSM
- WrapUp

Knowledge Base Articles

- [SpiceCSM User Guide](#)
- [InContact MAX Agent User Guide](#)
- [InContact Integrated Softphone User Guide](#)

Videos

- [SpiceCSM - Overview](#)
- [SpiceCSM - Tier 1 Service Desk Training](#)

In-Call Videos/Recordings

- [IT Support via SpiceCSM - Yesenia Mata](#)

Tier 1 Information - SpiceCSM

Escalation: Service Desk + InContact

Subject Matter Expert (SME): Thomas Wilson, Yesenia Mata, Adam Davis

Chat: Service Desk + InContact

Notes:

- N/A

Assessment

1. What two Sunrun applications does SpiceCSM integrate to increase the efficiency of IT Service Desk agents?
 - a. SentinelOne
 - b. InContact
 - c. ServiceNow
 - d. Skedulo
2. During the initial setup for SpiceCSM, what configuration should Tier 1 Service Desk agents change in their Chrome browser?
 - a. Turn off notifications for SpiceCSM.
 - b. Clear cache and cookies for SpiceCSM.
 - c. Flush DNS for SpiceCSM.
 - d. Uninstall/Reinstall Chrome browser.
3. After logging into SpiceCSM, which step comes next?
 - a. Login to CSOne Agent.
 - b. Login to Okta.
 - c. Open ServiceNow.
 - d. Open Cisco Webex.
- 4.

Section 4 - VCaaS/CJP/Calabrio

Tech Terms

- Access Request (AR)
- Cache
- Calabrio
- Cookies
- Customer Journey Platform (CJP)
- File Path
- InContact

- PDQ Deploy
- Salesforce
- Subject Matter Expert (SME)
- Task Manager
- Video Conferencing as a Service (VCaaS)
- Workforce Management (WFM)

Knowledge Base Articles

- [VCaaS Credentials](#)
- [VCAAS is not responding or it is frozen](#)
- [Logging into InContact and VCaaS Agents](#)
- [VCaaS will not launch](#)
- [Reset VCaaS Passwords](#)
- [VCaaS Error "Invalid Password"](#)
- [Checking for multiple users signing into the same VCaaS account](#)
- [Calabrio, VCaaS, and CJP](#)
- [VCaaS hold music](#)
- [VCaaS install Instructions](#)
- [CJP placing me in idle status](#)
- [CJP "Outbound Dial Failed"](#)
- [CJP Credentials](#)
- [CJP won't pop up](#)
- [CJP Browser Cookies Disabled Error](#)
- [VCaaS / Calabrio / Broadsoft / CJP](#)

In-Call Videos/Recordings

- [VCaaS Support - Adam Davis](#)
- [CJP Support - Yesenia Mata](#)

Videos

- [Veracity VCaaS](#)
- [Cisco Customer Journey Platform](#)
- [Calabrio ONE](#)

Tier 1 Information - VCaaS/CJP/Calabrio

Escalation: Workflow Management (WFM)

Subject Matter Expert (SME): Reid Willardson

Chat: IT Service Desk

Notes:

- VCaaS/CJP are Orange side softphones that are used within Customer Care.
- Credentials for this application are not provided to Tier 1
- If an issue with user credentials occurs, reach out to Reid Willardson or submit a WFM ticket.
- Tier 1 can uninstall and reinstall VCaaS

Section 5 - Webex

Tech Terms

- Java Control Panel
- Okta
- Session Initiation Protocol (SIP)
- Single Sign-On (SSO)
- Uniform Resource Locator (URL)
- Voice over Internet Protocol (VoIP)
- Webex

Knowledge Base Articles

- [Webex Calling Softphone Quick Start Guide](#)
- [Introduction to Webex Teams](#)
- [Webex - Planned Migration from ShoreTel Communicator](#)
- [WebEx Random Errors and Fixes](#)
- [Webex Personal Room Meetings vs Webex Standard Meetings](#)
- [How to Schedule a Webex Meeting from a Computer](#)
- [Adding and using Cisco Webex Conference in Google Calendar](#)
- [Joining a Meeting from within Webex Teams](#)
- [WebEx Teams Integration Issues with Calender Meetings or SIP missing](#)
- [Installing Webex Teams](#)
- [Webex Teams - Teams and Spaces](#)
- [Webex Teams Quickstart Guide](#)

In-Call Videos/Recordings

- [Webex Support - Adam Davis](#)

Videos

- [Webex Calling App](#)
- [Webex Calling - Overview](#)

Tier 1 Information - Webex

Escalation: Workflow Management (WFM)

Subject Matter Expert (SME): Reid Willardson

Chat: IT Service Desk

Notes:

- WebEx Teams will reach end-of-life soon, but Tier 1 Service Desk agents continue to provide support on a limited basis.
- WebEx Calling is still in use with some teams.

- Tier 1 can uninstall and reinstall the application if a customer continues to experience issues with it.

Section 6 - Solmetric Suneye

Tech Terms

- Authority Having Jurisdiction (AHJ)
- AutoCAD
- Cobblestone
- Object
- Salesforce
- Solmetric SunEye
- Task

Knowledge Base Articles

- [Solmetric SunEye Installation Guide](#)
- [Solmetric SunEye - Tutorial Videos](#)
- [Salesforce - Cobblestone Integration](#)
- [As-Built - Placement Deviation \(Same Roof\)](#)

Video

- [Solmetric SunEye - Overview](#)

In-Call Videos/Recordings

- [Solmetric SunEye Support - Scott Cooley](#)
- [Solmetric SunEye Support - Nicole Margetts](#)

Tier 1 Information - Solmetric SunEye

Escalation: N/A

Subject Matter Expert (SME): N/A

Chat: IT Service Desk

Notes:

- Tier 1 Service Desk support for Solmetric SunEye is typically limited to application uninstall/reinstall.

Course: Hardware

Module: Devices

Welcome

A computer system consists of two major elements: hardware and software. Computer hardware is the collection of all the parts you can physically touch. Computer software, on the other hand, is not something you can touch. Software is a set of instructions for a computer to perform specific operations. You need both hardware and software for a computer system to work. Some hardware components are easy to recognize, such as the computer case, keyboard, and monitor. However, there are many different types of hardware components. Regardless, Sunrun's hardware systems are critical to its business success.

Section 1 - Chromebook

Tech Terms

- AC Adapter
- Asset Tag
- Chromebook
- Chrome Remote Desktop
- Docking Station
- Field Sales Consultant (FSC)
- Onboarding/Offboarding
- Powerwash
- Provisioning
- Service Level Agreement (SLA)
- Single Sign-On (SSO)

- Virtual Private Network (VPN)

Knowledge Base Articles

- [Chromebook Provisioning](#)
- [Dell Docking Station WD19](#)
- [VPN \(Pulse Secure\) - Chromebook Setup Guide](#)
- [Chromebook WiFi Setup](#)
- [Chromebook - Sign In Process](#)
- [Chromebook - Get Remote Support](#)
- [Chromebook - Reset Guide \(Power Wash\)](#)
- [Connecting ChromeBook to Printer](#)

Videos

- [What is a Chromebook?](#)
- [Chrome Remote Desktop](#)

In-Call Videos/Recordings

- [Chromebook Hotspot Support - Yesenia Mata](#)

Tier 1 Information - Chromebook

Escalation: Hardware, Tier II Service Desk

Subject Matter Expert (SME): IT Service Desk Tier II - Hardware

Chat: Hardware Esc, IT Service Delivery

Notes:

- N/A

Section 2 - Drones

Tech Terms

- DJI Mavic 2 Pro

- Drone
- Field Sales Consultant (FSC)
- Firmware

Knowledge Base Articles

- [DJI Assistant 2 for Mavic - Setup Guide](#)
- [DJI Assistant 2 For Mavic - Download Center](#)

Videos

- [DJI Mavic 2 Pro - Introduction](#)

In-Call Videos/Recordings

- [Drones Support - Andrew Moore](#)

Tier 1 Information - Drones

Escalation: Hardware, Tier II Service Desk

Subject Matter Expert (SME): IT Service Desk Tier II - Hardware

Chat: Hardware Esc, IT Service Delivery

Notes:

- N/A

Section 3 - Zebra Printer/Scanner

Tech Terms

- Enterprise Resource Planning Team (ERP)
- Oracle
- Oracle RF-Smart
- Print Suite Bridge (PSB)
- Static/Dynamic IP Address

- Transmission Control/Internet Protocol (TCP/IP)
- Warehouse Management Service
- Zebra Printer/Scanner

Knowledge Base Articles

- [Zebra Printer - Configure to print barcode labels](#)
- [WMS - Zebra Scanner Troubleshooting](#)
- [Zebra Label Printer Hardware Troubleshooting](#)
- [Print Suite Bridge - RF Smart Printer Status](#)

Videos

- [Zebra ZD420 - Introduction](#)
- [Oracle RF-Smart](#)

In-Call Videos/Recordings

- [Zebra Scanner Support - Keldon Lopez](#)

TIER 1 INFORMATION - Zebra Printer/Scanner

Escalation: Hardware, Tier II Service Desk

Subject Matter Expert (SME): IT Service Desk Tier II - Hardware

Chat: Hardware Esc, IT Service Delivery

Notes:

- N/A

Module: Procedures

Welcome

Design and Develo

Section 1 - Hardware Procedures

Tech Terms

- Chromebook
- E-waste
- Hardware Warranty
- International Mobile Equipment Identity (IMEI)
- IT Asset Disposition (ITAD)
- IT Equipment Audit
- Original Equipment Manufacturer (OEM)
- ServiceNow

Knowledge Base Articles

- [Technology Operations E-Waste Procedures](#)
- [Quarterly Equipment Audit Procedures](#)
- [Hardware Warranty Process](#)

Videos

- [How Computers & Electronics are Recycled](#)

In-Call Videos/Recordings

- [Hardware Support - Scott Cooley](#)

Tier 1 Information - Hardware Procedures

Escalation: Hardware, Tier II Service Desk

Subject Matter Expert (SME): IT Service Desk Tier II - Hardware

Chat: Hardware Esc, IT Service Delivery

Notes:

- N/A

Section 2 - UPS Shipping

Tech Terms

- Okta
- Single Sign-On (SSO)
- UPS CampusShip

Knowledge Base Articles

- [UPS - How to Ship Equipment](#)
- [UPS Claim Process](#)

Videos

- [UPS CampusShip - Overview](#)
- [UPS - Shipping Lithium Batteries](#)

In-Call Videos/Recordings

- [UPS CampusShip Support - Adrian Belzer](#)

Tier 1 Information - UPS Shipping

Escalation: Hardware

Subject Matter Expert (SME): Zach Miller

Chat: Hardware Esc, IT Service Delivery

Notes:

- Tier I Service Desk uses UPS CampusShip when assisting customers who need to return equipment.
- Access UPS CampusShip at <https://www.campusship.ups.com/login/>
 - Username: SLOIT
 - Password: L3#0*5k

Course: Productivity Suite

Module: Google Workspace

Welcome

Google Workspace includes all of the productivity apps Sunrunners need to get their jobs done, including Gmail, Calendar, Drive, Docs, Sheets, Slides, Meet and many more. Whether they're working on a mobile device or connecting with customers, Sunrunners use Google Workspace to create, communicate and collaborate.

Section 1 - Google Workspace

Tech Terms

- Avatar
- Emoji
- Google Workspace
- Okta
- Single Sign-On (SSO)
- Uniform Resource Locator (URL)

Knowledge Base Articles

- [G Suite Comprehensive Overview](#)
- [Google Calendar - Adding a Secondary Calendar](#)
- [Creating Google Chat Rooms](#)
- [Google Groups Bulk Upload for Members](#)
- [Google Groups - Managing Members](#)
- [Google Group Creation](#)
- [Google Groups - Auto Reply Setup Guide](#)
- [Google Meet - Fixing Audio Issues](#)
- [Google Workspace UnArchive](#)
- [How to add pronouns to Google Workspace](#)

Videos

- [Google Workspace - Overview](#)

In-Call Videos/Recordings

- [Google Calendar Support - Danny Mann](#)

Tier 1 Information - Google Workspace

Escalation: Tier II Service Desk

Subject Matter Expert (SME): Tier III Service Desk/Corporate Apps

Chat: IT Service Delivery

Notes:

- Chrome utilizes RAM on desktops and laptops. In the event of an issue with a page not loading correctly, have the user clear cache and cookies for ALL time.
- Known Error: “Whenever I click a GMail link in Salesforce or somewhere, I get a handler error or it’s blocked”
 - Solution: Crankwheel KBA with Handler issue solution

Section 2 - Bettercloud

Tech Terms

- Bettercloud
- Domain Name
- Gmail Inbox Delegation
- Google Workspace
- Incident
- Onboarding/Offboarding
- Single Sign-On (SSO)

Knowledge Base Articles

- [Google Workspace UnArchive](#)
- [Managers Guide to Offboarding Employees - Technology FAQ](#)
- [Google Group Management Policy](#)
- [Gmail Delegation Process for Offboarding Employees](#)
- [Google Groups - Managing Members](#)

Videos

- [Bettercloud Introduction](#)
- [Bettercloud Overview](#)
- [Bettercloud - Breshey Lillybridge](#)
- [Bettercloud Training](#)

In-Call Videos/Recordings

- [Bettercloud Support - Huseen Sufi](#)

Tier 1 Information - Bettercloud

Escalation: Tier II Service Desk

Subject Matter Expert (SME): Corporate Apps/Tier III, Nathan Chapman

Chat: IT Service Delivery

Notes:

- How do I access bettercloud?
 - Old View: g.bettercloud.com
 - New View: app.bettercloud.com
- What's the difference?
 - Use the old view for delegating non-human accounts.
 - Use new view for any other task like delegating inboxes and changing email addresses.

Module: Microsoft

Welcome

Microsoft Office is a suite of applications for business productivity. A suite is a group of applications that are designed to work well together and are designed around a common interface. It is less expensive to buy a suite than it is to buy the individual applications separately. At Sunrun, Microsoft Office 2016 and Microsoft Office 365 support productivity across multiple business organizations.

Section 1 - Microsoft Office/Office 365

Tech Terms

- 32-bit vs. 64-bit
- Access Request (AR)
- Chrome Extension
- Office365
- Okta
- Okta Admin
- MacOS
- Microsoft Office
- Provisioning
- Single Sign-On (SSO)
- Suite

Knowledge Base Articles

- [Office 365 Download and Install](#)
- [Office 2019 for Mac Installation](#)
- [Office 365 License Expired](#)
- [Open Microsoft Office Files with a Chrome Extension](#)
- [Provision Access for Office 365](#)
- [Office 365 Activation Sign-in](#)
- [Opening Excel file in Google Sheets](#)
- [Service Desk - Tips and Tricks \(Various Applications\)](#)

Videos

- [Microsoft Office Installation](#)

In-Call Videos/Recordings

- [Microsoft Office Support - Yesenia Mata](#)

Tier 1 Information - Microsoft Office/Office 365

Escalation: IT Service Delivery

Subject Matter Expert (SME): N/A

Chat: IT Service Delivery

Notes:

- Sunrun employees will be moving to Office365 in 2022, but licenses are currently limited for access before then.
- Sunrun is renegotiating licensing with Microsoft, and Office 2016 volume licenses will be used until O365 rollout in 2022.

Module: Adobe

Welcome

Adobe Creative Cloud, Sometimes called Adobe CC, is a set of applications and services from Adobe Inc. that gives subscribers access to a collection of software used for graphic design, video editing, web development, photography, along with a set of mobile applications and also some optional cloud services. Sunrun's most popular Adobe CC application is Adobe Acrobat DC, which allows users to create, convert, edit and sign PDFs from any device.

Section 1 - Adobe Creative Cloud

Tech Terms

- Access Request (AR)
- Adobe Acrobat

- Adobe Creative Cloud
- Microsoft Office
- Okta
- Portable Document Format (PDF)
- Single Sign-On (SSO)
- Suite

Knowledge Base Articles

- [Adobe Acrobat Pro - Employee Usage Guide](#)

Videos

- [Adobe Creative Cloud - Introduction](#)

In-Call Videos/Recordings

- [Adobe Support - Joe Falbo](#)

Tier 1 Information - Adobe

Escalation: IT Service Delivery - Tier II Applications

Subject Matter Expert (SME): N/A

Chat: IT Service Delivery

Notes:

- DocHub is a free PDF editor that provides nearly all the same features of Adobe Acrobat DC. Unless a customer needs Adobe Acrobat DC (paid professional version), IT Service Desk will strongly recommend DocHub.
- If Adobe Acrobat DC (paid professional version) is absolutely necessary, a request is required and will be considered with a good business case.

- What constitutes a “good business case”? Essentially any reason that doesn’t allow the caller to use the free version. These differences among versions are listed in [KB0010136: DocHub Employee Usage Guide](#).
- We have a Paid Version of DocHub as well. If the free version doesn't suffice, customers may request DocHub Pro.

Glossary - Tech Terms

#

In computing, there are two types of processors existing, **32-bit and 64-bit** processors. These types of processors tell us how much memory a processor can access from a CPU register. The CPU register stores memory addresses, which is how the processor accesses data from RAM. One bit in the register can reference an individual byte in memory, so a 32-bit system can address a maximum of 4 GB of RAM. A 64-bit register can theoretically reference 17,179,869,184 GB (16 exabytes) of RAM. A major difference between 32-bit processors and 64-bit processors is the number of calculations per second they can perform, which affects the speed at which they can complete tasks. Windows OS comes in two versions: 32-bit and 64-bit.

A-E

An **AC adapter** is an external power supply used with devices that run on batteries or have no other power source. AC adapters help reduce the size of a laptop computer by alleviating the need for a standard sized power supply.

Access Request (AR) management is the process of receiving, evaluating and either approving or denying user requests to interact with Sunrun's data and organizational resources. Managing access requests is more than approving or denying access requests based on the identity of the requester; it's a balancing act between organizational security and operational efficiency. Access request management requires an understanding of digital identity and the risk of access in a given access request.

Account Access status updates are pushed to **OKTA** and flow downstream to applications such as **Active Directory (AD)**, Salesforce, Google, etc. When an employee is terminated, IT Service Desk team members follow standardized practices and procedures for the deprovisioning of a terminated employee's access and accounts.

Accounts Receivable (AR) is the Sunrun department responsible for collecting and processing payments from partners and customers.

Active Directory (AD) is a directory service developed by Microsoft for Windows domain networks. It is included in most Windows Server operating systems as a set of processes and services. A server running the Active Directory Domain Service (AD DS) role is called a domain controller. It authenticates and authorizes all users and computers in a Windows domain type network, assigning and enforcing security policies for all computers, and installing or updating software. For example, when a user logs into a

computer that is part of a Windows domain, Active Directory checks the submitted password and determines whether the user is a system administrator or normal user. Also, it allows management and storage of information, provides authentication and authorization mechanisms and establishes a framework to deploy other related services.

Active Directory Organizational Unit (OU) is a container in the Active Directory domain that can contain different objects from the same AD domain: other containers, groups, user and computer accounts. An Active Directory OU is a simple administrative unit within a domain on which an administrator can link Group Policy objects and assign permissions to other users/groups.

A user account in **Active Directory (AD)** is locked if the password is incorrectly typed several times in a row and exceeds the maximum number allowed by the account password policy. **Active Directory Users and Computers (ADUC)** can be used to unlock a user account.

Active Directory Users and Computers (ADUC) – ADUC is a commonly used Microsoft management console to support both users and computers. Simply right-click on a user account, select *reset password*, and providing you have the correct privileges on that account, you can reset the password.

Illinois's **Adjustable Block Program** is a state-administered solar incentive program created to facilitate the development of new photovoltaic distributed generation and community solar projects through the issuance of renewable energy credit delivery contracts, as required by Illinois law.

Adobe Acrobat is an application used to view, create, manipulate, print and manage Portable Document Format (PDF) files. The basic Adobe Acrobat Reader, available for several desktop and mobile platforms, is freeware and comes installed on most Sunrun devices; it supports viewing, printing and annotating of PDF files. Adobe Acrobat Pro DC, available at a premium cost for Microsoft Windows and macOS, can also create, edit, convert, digitally sign, encrypt, export and publish PDF files.

Adobe Creative Cloud, Sometimes called Adobe CC, is a set of applications and services from Adobe Inc. that gives subscribers access to a collection of software used for graphic design, video editing, web development, photography, along with a set of mobile applications and also some optional cloud services. Sunrun's most popular Adobe CC application is Adobe Acrobat DC, which allows users to create, convert, edit and sign PDFs from any device.

The **after-call work (ACW)** that Tier 1 Service Desk agents complete in WrapUp time includes logging contact reasons and outcomes, scheduling follow-ups and similar actions, updating other team members, dispositioning a call, entering information into a CRM or sending a follow-up email to the customer. WrapUp time for doing ACW provides the necessary context to ensure a good experience for your customer the next time they interact with you.

Agent Leg is the Tier 1 Service Desk agent's connection to the InContact call center platform. An agent must be connected to the agent leg to handle voice contacts.

Amazon Web Services (AWS) is a subsidiary of Amazon providing on-demand cloud computing platforms and APIs to individuals, companies, and governments, on a metered pay-as-you-go basis. These cloud computing web services provide a variety of basic abstract technical infrastructure and distributed computing building blocks and tools. One of these services is Amazon Elastic Compute Cloud (EC2), which allows users to have at their disposal a cluster of **virtual machines** (or virtual computers), available all the time, through the Internet. AWS's virtual machines emulate most of the attributes of a real computer, including hardware central processing units (CPUs) and graphics processing units (GPUs) for processing; local/RAM memory; hard-disk/SSD storage; a choice of operating systems; networking; and pre-loaded application software such as web servers, databases, and customer relationship management (CRM).

Amazon WorkSpaces is a fully managed desktop virtualization service that enables secure access to data and applications from any supported device. It enables Sunrun to provision virtual, cloud-based Microsoft Windows or Amazon Linux desktops for its users; these desktops are known as WorkSpaces.

AppData is a hidden folder located in C:\Users\<username>\AppData. The AppData folder contains custom settings and other information needed by applications. You won't use this folder very often, but this is where your important files reside (i.e., bookmarks, saved sessions, web browser bookmarks and cache, application configuration files, etc.). The folder is hidden by default in Windows File Explorer and has three hidden sub-folders: Local, LocalLow and Roaming.

Among the icons on the left side of the Chromebook screen is one icon that looks like a grid of nine boxes, the **App Launcher** icon, comparable to the Start button on Windows. When the App Launcher is selected, a pop-up window appears, displaying a number of applications.

A Java **applet** is a Java program that can be embedded into a web page. It runs inside the web browser and works at client side. An applet is embedded in an HTML page using the APPLET or OBJECT tag and hosted on a web server. Applets are used to make the website more dynamic and entertaining.

In ServiceNow, the **application navigator**, or left navigation bar, provides access to all applications and the modules they contain, enabling users to quickly find information and services. You can use commands in the navigation filter to navigate directly to the list, form, or configuration view of a table.

An IT **asset** is a piece of software or hardware within an information technology environment. Tracking of Sunrun's IT assets within its IT asset management system can be crucial to the operational or financial success of its enterprise. IT assets are integral components of Sunrun's systems and network infrastructure.

Asset management is a systematic process of developing, operating, maintaining, upgrading, and disposing of an organization's assets or configuration items (CIs) in the most cost-effective manner (including all costs, risks and performance attributes).

An **asset tag** is a label or sticker that identifies equipment or asset using a unique serial number (or barcode). An asset tag is generally made of a material like anodized aluminum or laminated polyester. Asset tags may carry the company's logo and information on the equipment it is affixed upon. Barcodes are used on asset tags to make the process of data entry quick and to reduce field entry errors. The function of asset tags is to fit in size to every small, mobile, and valuable asset. Asset tags are thus made smaller, more tamper-resistant, and are typically integrated with asset tracking software as well.

The **Authority Having Jurisdiction (AHJ)** is the civic authority for a town or county. To install solar on a given site, solar installers must receive permission from the location's AHJ.

AutoCAD is a computer-aided tool that allows many different types of designers to create diverse kinds of drawings and designs. Architects, engineers, and construction professionals use AutoCAD to create precise 2D and 3D drawings, models or constructions that would otherwise be drawn by hand. The program also allows the user to group or layer objects, keep objects in a database for future use, and manipulate properties of objects, such as size, shape and location.

In computing, an **avatar** is a graphical representation of a user or the user's character or persona. It may take either a two-dimensional form as an icon in Internet forums and other online communities or a three-dimensional form, as in games or virtual worlds.

Avaya is an American technology company that specializes in business communications services such as unified communications (UC) and contact center (CC).

Average Handle Time (AHT) is a metric or calculation that sums total talk time, hold time, conference time and wrap time and then divides the result by total calls handled.

BarTender Software is Sunrun's label design software for designing, creating and printing labels with images, text, barcodes and RFID tags.

BetterCloud is Sunrun's SaaS Operations Management platform used to define, remediate and enforce management and security policies for its SaaS applications. Bettercloud allows Sunrun IT to take control of their Google Workspace environment with continuous event monitoring, individual and bulk remediation actions and fully automated policy enforcement.

BeyondTrust Remote Support (formerly Bomgar) is remote desktop access, service desk and collaboration software for Windows, Mac, Linux, iOS (iPad, iPhone) and Android devices. It allows Sunrun's IT Service Desk agents to securely support end users, desktops, laptops, mobile devices, access servers and endpoints from anywhere in the world. At Sunrun, it is the centralized remote support platform built into ServiceNow that provides secure, multi-platform remote support and chat capabilities as a virtual appliance.

A **BitLocker recovery key** is a unique 48-digit numerical password that can be used to unlock your system if BitLocker is otherwise unable to confirm for certain that the attempt to access the system drive is authorized.

Business intelligence (BI) combines business analytics, data mining, data visualization, data tools and infrastructure and best practices to help organizations to make more data-driven decisions.

BrightPath is Sunrun's proprietary end-to-end automated software platform designed to manage home solar projects from lead to sale in one streamlined process. The Sunrun BrightPath Station brings this technology to life for consumers in an engaging retail environment. The knowledge-based station uses cloud computing to take customers through the entire home solar process from selecting hardware and system design to pricing, scheduling, permitting, installation and more.

A web browser **cache** is storage of program and website assets on the chance that it may be useful later. When you visit a website, your browser takes pieces of the page and stores them on your computer's hard drive. Some of the assets your browser will store are images (i.e., logos, pictures, backgrounds, etc.), HTML, CSS and JavaScript. In short, browsers typically cache what are known as static assets, or parts of a website that do not change from visit to visit. Each website determines what static assets to cache and for how long they are cached. Old versions of cached files cause all sorts of issues for users if their devices don't have the latest version of the file, problems such as mismatched formatting, broken JavaScript and incorrect images are just a few.

Calabrio is a web-based Workforce optimization (WFO) solution that is composed of the following components: Call Recording, Quality Management, Workforce Management, and Analytics. This technology captures and stores customer engagement center interactions, provides an analysis, and generates reports.

The **California Public Utilities Commission (CPUC)** is a regulatory agency that regulates privately owned public utilities in the state of California, including electric power, telecommunications, natural gas and water companies.

Call queues provide a method of routing callers to people in Sunrun's organization who can help with a particular issue or question. Calls are distributed one at a time to the people in the queue (who are known as agents). Call queues typically provide a greeting message and music while people are waiting on hold in a queue.

CalSync is an app integration that syncs a user's Salesforce Calendar to his/her Google Calendar. CalSync can be configured as a one-way sync or a two-way sync between calendars.

Canvassing in sales is the process of making contact with prospective customers that have zero history of interaction with a brand or business. Sales canvassing is an integral part of most Sunrun's sales strategies.

CAPTCHA (Completely Automated Public Turing test to tell Computers and Humans Apart) is a type of security measure known as challenge-response authentication. CAPTCHA helps protect users from spam and password decryption by asking them to complete a simple test that proves they are human and not a computer trying to break into a password protected account. A CAPTCHA test is made up of two simple parts: a randomly generated sequence of letters and/or numbers that appear as a distorted image, and a text box. To pass a test and prove human identity, a user simply types the characters seen in the image into the text box.

A **catalog task** is used to source items and fulfill requests. You can view and edit catalog tasks from a request. If a request requires approval, a catalog task is created automatically when the request is approved. If a request does not require approval, a catalog task is created automatically when the request is created.

In computer security, **challenge-response authentication** is a family of protocols in which one party presents a question ("challenge") and another party must provide a valid answer ("response") to be authenticated. The simplest example of a challenge-response protocol is password authentication, where the challenge is asking for the password and the valid response is the correct password.

A **change-advisory board (CAB)** delivers support to a change-management team by advising on requested changes, assisting in the assessment and prioritization of changes. The CAB is tasked with reviewing and prioritizing requested changes, monitoring the change process and providing managerial feedback.

Channel Partner refers to a solar provider who sells and installs systems and then passes the contract to Sunrun for the remainder of the relationship, including ongoing customer service. Channel Partners were formerly known as Integrated or Full Service Partner (FSP).

Chromebooks run on **Chrome OS**, a Google operating system. It's based on the Google Chrome browser, so it's different from other operating systems. Chrome OS is designed to perform all tasks via the internet and store it in the cloud. Users no longer have to install demanding software, because they can use Google's web apps, which can be found on the desktop or in the taskbar. Chrome OS works on laptops designed specifically for this system: Chromebooks. Because of the less demanding apps and the online aspect, the Chrome OS operating system is fast and uses little of the battery life.

Google **Chrome extensions** are programs that can be installed into Chrome in order to change the browser's functionality. This includes adding new features to Chrome or modifying the existing behavior of the program itself to make it more convenient for the user.

In Chrome browser, the **chrome menu** is indicated by three vertical dots in the upper right corner of the browser window. To check for updates, open the chrome menu > select "About Chrome OS" > select "Check for updates". On a Chromebook, the same chrome menu and update can be located with these steps: select the clock/time on the bottom right of the screen > select settings gear > select About Chrome OS at bottom left > select "Check for updates".

Chrome Remote Desktop is a remote desktop software tool developed by Google that allows a user to remotely control another computer through a proprietary protocol developed by Google unofficially called "Chromoting". It transmits the keyboard and mouse events from one computer to another, relaying the graphical screen updates back in the other direction, over a network. This feature therefore consists of a server component for the host computer, and a client component on the computer accessing the remote computer.

ClickMobile is a scheduling and dispatch mobile application for Sunrun's field service sector. Sunrun's field resources employees use ClickMobile to communicate with their home office and with their peers using the Field Service Edge system.

A **client** is a piece of computer hardware or software that accesses a service made available by a server as part of the client-server model of computer networks. The server is often (but not always) on another computer system, in which case the client accesses the service by way of a network.

Cobblestone is Sunrun's in-house online design software for the CAD department to assist with designing and calculating systems for customers' houses.

BarTender **Commander** is a software utility, provided with both the Automation editions of BarTender, that enables you to perform automatic printing using BarTender in situations where it is not convenient or possible to perform automation using ActiveX or command lines.

A **configuration item (CI)** is any service component, infrastructure element or other item that needs to be monitored and maintained through asset management in order to ensure the successful delivery of services outlined in an organization's service level agreements (SLAs).

In ServiceNow, **Connect Chat** is a real-time messaging tool that enables users to chat with individuals and groups, quickly share files, and collaborate on any record by connecting with the right people instantly.

Every printer has a **control panel** somewhere on its body, whether it is an LCD control panel that displays text, or a control panel of only a couple of buttons. Whatever the type, every control panel manages features that run the printer and allows a user to configure it as needed.

Cookies serve useful and sometimes essential functions on the web. They enable web servers to store stateful information (such as items added in the shopping cart in an online store) on the user's device or to track the user's browsing activity. They can also be used to save for subsequent use information that the user previously entered into form fields, such as names, addresses, passwords, and payment card numbers. *HTTP cookies* are small blocks of data created by a web server while a user is browsing a website; they are placed on the user's computer or other device by the user's web browser. Cookies are placed on the device used to access a website, and more than one cookie may be placed on a user's device during a session. *Authentication cookies* are commonly used by web servers to authenticate that a user is logged in, and with which account they are logged in. Without the cookie, users would need to authenticate themselves by logging in on each page containing sensitive information that they wish to access. *Tracking cookies*, and especially third-party tracking cookies, are commonly used as ways to compile long-term records of individuals' browsing histories.

Command Prompt (cmd.exe) is the default command-line interpreter for Microsoft Windows operating system. The name refers to its executable filename. It is also commonly referred to as cmd or the Command Prompt, referring to the default window title on Windows.

Computer-aided design (CAD) is the use of computers to aid in the creation, modification, analysis or optimization of a design. This software is used to increase the productivity of the designer, improve the quality of design, improve communications through documentation and to create a database for manufacturing.

In IT service delivery, **conflict resolution** happens when there's an agreed-upon action toward solving a shared problem. Ideally, all parties walk away feeling like others heard and respected their ideas. The process of reaching that satisfied state requires a careful balance of self-awareness, listening, empathy and insight.

Coupa is Sunrun's expense reporting platform for all business spend management activities including invoicing, contracting and payments.

CrankWheel is a screen sharing solution built for inside sales teams and telesales; it's managed via a Chrome extension. Sales representatives can send a link by email or with SMS, and the customer can view it in any browser, on any device without installing anything.

Customers can be internal or external. An *internal customer* is a customer who works for the same business as the IT service provider. *External customer* is a customer who works for a different business from the IT service provider.

For Sunrun's IT Service Delivery Team, **customer experience (CX)** refers to its agents' engagement with customers at every point of their IT experience. In large part, it's the sum total of all interactions a customer has with IT Service Delivery. At each touchpoint, service-level decisions directly impact the success of Sunrun employees.

Customer Portal (mySunrun) is Sunrun's customer platform where solar customers can monitor their home solar systems, make payments, view billing history or manage accounts and preferences.
my.sunrun.com

Customer relationship management (CRM) is a technology for managing all of Sunrun's relationships and interactions with customers and potential customers. A CRM system helps Sunrun connect to customers, streamline processes, and improve profitability.

Customer Satisfaction (CSAT) Surveys are implemented directly through ServiceNow to provide leadership with metrics on Customer Satisfaction Ratings for the Service Desk and Site Services Teams. Feedback is used to identify and evaluate trends and create action plans for areas of concern to improve the services provided to the organization as a whole.

Cybersource is an e-commerce credit card payment system management company. Customers use Cybersource to process online payments, streamline online fraud management and simplify payment security.

Dead air is a term used in contact center customer service. As the name implies, dead air refers to periods of silence during customer service calls, where neither the support agent or customer are taking part in conversation.

Dealer Portal is the homepage for all dealer needs, and Dealers can access it via the Dealer Portal tile in Okta. Dealers can access dealer stats, view their training, lookup holds, see zip codes where Sunrun sales take place, submit a service desk ticket and view various department info.

Sunrun's **Dealer Program** is an alternative sales program where most of the employees that are called "Dealers" are simply sales reps employed by a third party company. There are some exceptions that also include installation responsibilities, but most employees in the Dealer Program are sales representatives.

Dealer Stats can be accessed through the dealer portal tile. This is available to all users, but they will not be able to see any accounts that they have sold unless they are added to that office.

In Gmail, a **delegated inbox** is essentially a mailbox that you have given another user access to. This could be something like an Accounts' inbox that can be delegated out to the members of the Accounts team. At Sunrun, managers have 20 days to request Gmail inbox delegation for a terminated employee.

Desktop as a Service (DaaS) is a cloud computing offering where a service provider delivers virtual desktops to end users over the Internet, licensed with a per-user subscription.

Sunrun's **desktop support** team is staffed with information technology (IT) professionals who maintain the company's computer hardware and software systems. Desktop support is responsible for installing new programs, managing updates and providing technical support. Their responsibilities include diagnosing and resolving technical issues with hardware or software systems; provisioning system configurations for end users; assessing needs and recommending technical solutions (i.e., patches, upgrades, enhancements, etc.); documenting technical support and managing the proper installation, maintenance and use of technical systems; and completing installations backups of data, upgrading systems as needed and installing new software or hardware solutions.

Device Manager is a component of the Microsoft Windows operating system. It allows users to view and control the hardware attached to the computer. When a piece of hardware is not working, the offending hardware is highlighted for the user to deal with. The list of hardware can be sorted by various criteria.

DevOps is a set of practices that works to automate and integrate the processes between software development and IT teams, so they can build, test, and release software faster and more reliably.

Dialpad is a unified communications platform that connects Sunrun teams through voice, video, messages, and online meetings. Dialpad provides a comprehensive suite of advanced features to help streamline Sunrun's business communications and improve productivity.

A **direct conversation** in ServiceNow Connect Chat is a conversation between two users.

Direct-to-Home (D2H) is Sunrun's door-to-door canvassing sales team.

Apple **Disk Image** is a disk image format commonly used by the macOS operating system. When opened, an Apple Disk Image is mounted as a volume within the Macintosh Finder. An Apple Disk Image can be structured according to one of several proprietary disk image formats, including the Universal Disk Image

Format (UDIF) from Mac OS X and the New Disk Image Format (NDIF) from Mac OS 9. An Apple disk image file's name usually has ".dmg" as its extension.

In e-mail applications, a **distribution list** is a group of mail recipients that is addressed as a single recipient. Distribution lists are used to send e-mail to groups of people without having to enter each recipient's individual address.

Dizzion is a virtual desktop and end user computing services provider, often described as “outsourced VDI” or “desktop as a service.” Dizzion offers a range of solutions, including application streaming and secure endpoint solutions (i.e., thin clients) to support Sunrun's offshore employees. Many of Sunrun's Bogota-based and work-from-home agents use Dizzion as a virtual machine.

DJI Mavic 2 Pro is the drone that supports Sunrun's drone program and is used by Sunrun's Field Operations Team to develop solar designs for sales proposals. It is described as a Done Quadcopter UAV with Hasselblad Camera, 3-Axis Gimbal HDR 4K Video Adjustable Aperture 20MP 1" CMOS Sensor, and it can travel up to 48 miles per hour.

DocHub is a free online PDF annotator and document signing platform available at no cost to Sunrun employees. DocHub lets users add text, draw, add signatures and make document templates.

A **docking station** or port replicator is a device that expands the functionality of a portable device, transforming it into a desktop replacement. It typically powers a laptop, drives one or more displays, connects to a wired network and allows the user to keep USB devices (including a full-sized keyboard and mouse) attached. Plug in a single connector, and the user is ready to work.

DocuSign is a service that provides Sunrun's employees a fast, reliable way to electronically sign documents and agreements on any device, regardless of OS. DocuSign is also used to manage electronically signed documents, such as contracts and work orders.

A **domain name** is an identification string used in various networking contexts and for application-specific naming and addressing purposes. In general, a domain name identifies a network domain, or it represents an Internet Protocol (IP) resource, such as a personal computer used to access the Internet, a server computer hosting a website, or the web site itself or any other service communicated via the Internet.

The **Domain Name System (DNS)** is a hierarchical naming system for computers, services or other resources connected to the Internet or a private network. It associates various information with domain names assigned to each of the participating components. Most prominently, it translates more readily memorized domain names to the numerical IP addresses needed for locating and identifying computer services and devices with the underlying network protocols.

Doors is a web-based sales application that provides potential customer information to sales representatives who travel door-to-door to pre-qualify customers. Doors was developed by Vivint Solar and is supported by IT Service Desk - Tier I & Tier II.

An unmanned aerial vehicle (UAV), commonly known as a **drone**, is an aircraft without any human pilot, crew or passengers on board. UAVs are a component of an unmanned aircraft system, which include additionally a ground-based controller and a system of communications with the UAV.

Egencia is Sunrun's business travel platform. It allows employees to book their own flights, hotel and lodging, much like its parent company, Expedia. All customer issues with Egencia should be escalated to travel@sunrun.com.

An **emoji** is a pictogram, logogram, ideogram or smiley embedded in text and used in electronic messages and web pages. The primary function of emoji is to fill in emotional cues otherwise missing from typed conversation.

An **endpoint protection platform (EPP)** is a comprehensive security solution deployed on endpoint devices to protect against threats. EPP solutions are typically cloud-managed and utilize cloud data to assist in advanced monitoring and remote remediation. EPP solutions employ a broad range of security capabilities, but at a base level include: prevention of file-based malware; detection of suspicious activity using techniques ranging from indicators of compromise (IOCs) to behavioral analysis; and investigation and remediation tools to handle dynamic incidents and alerts. Endpoint protection platforms are the latest evolution of endpoint security developed to identify attackers who can bypass traditional endpoint security as well as to help consolidate complex security stacks.

Endpoint security is the practice of securing endpoints or entry points of end-user devices such as desktops, laptops, and mobile devices from being exploited by malicious actors and campaigns. Endpoint security systems protect these endpoints on a network or in the cloud from cybersecurity threats. Endpoint security has evolved from traditional antivirus software to providing comprehensive protection from sophisticated malware and evolving zero-day threats.

MyEnlighten from Enphase is a web-based application that allows solar power system owners to log in and remotely monitor their solar power production system. This tool is accessible using most common web browsers, and it can be installed as an app for mobile devices.

Enhanced 911 (E911) is an enhanced feature of North America's 911 system that automatically ties a location to a call, whether it's a specific address or GPS coordinates, effectively improving the reliability of

emergency dispatchers, such as police, fire, etc. Configuring the E911 feature is part of the setup process for all of Sunrun's Dialpad accounts.

Enphase designs and manufactures software-driven home energy solutions that span solar generation, home energy storage and web-based monitoring and control. Enphase developed the microinverter that is a key component of Sunrun's residential solar systems.

Sunrun's **Enterprise Resource Planning Team (ERP)** is a division of its Engineering and Technology group that maintains and supports our back office applications and its infrastructure. ERP builds, buys and integrates with applications to address our business needs for growth, productivity and compliance at the lowest cost structure. ERP is a team of business analysts, solutions architects and developers based in the US and India.

Escalation describes the order in which escalation notifications are sent, the escalation audience and other aspects of the escalation. Sunrun's IT Service Delivery escalation policy clarifies the boundaries and channels of decision-making throughout the ITSD Team in order to solve the problem quickly and with clarity.

E-waste or end-of-life electronics describe used electronics that are nearing the end of their useful life and are discarded, donated or given to a recycler. Though e-waste is the commonly used term, EPA considers e-waste to be a subset of used electronics and recognizes the inherent value of these materials that can be reused, refurbished or recycled to minimize the actual waste that might end up in a landfill or improperly disposed in an unprotected dump site either in the US or abroad.

The **Exception Site List** feature provides a way for users to run Rich Internet Applications (RIAs) that otherwise would be blocked by security checks. The criteria used to determine if RIAs are allowed to run are becoming stricter.

Expense reporting is a process used to track business spending. It is most commonly completed by employees to itemize expenditures for which they are requesting reimbursement.

F-J

A **fax** (short for facsimile) is the telephonic transmission of scanned-in printed material (text or images), usually to a telephone number associated with a printer or other output device. The original document is scanned with a fax machine, which treats the contents (text or images) as a single fixed graphic image, converting it into a bitmap. In this digital form, the information is transmitted as electrical signals through the telephone system. The receiving fax machine reconverts the coded image and prints a paper copy of the document.

Sunrun's **Field Sales Consultants (FSC)** are responsible for the company's door-to-door residential solar sales. They develop sales strategies and attract new clients by sourcing self-generated leads and appointments with potential Sunrun customers. They conduct in-home sales presentations for potential customers and are responsible for the sales experience from initial contact through installation and after the customer's system is turned on.

A **Field Services Technician** at Sunrun handles on-site servicing, diagnostics and repairs for Sunrun's residential products and equipment.

A **file path** is a string of characters used to uniquely identify a location in a directory structure. It is composed by following the directory tree hierarchy in which components, separated by a delimiting character, represent each directory. The delimiting character is most commonly the slash ("/"), the backslash character ("\"), or colon (":"), though some operating systems may use a different delimiter. Paths are used extensively in computer science to represent the directory/file relationships common in modern operating systems, and they are essential in the construction of Uniform Resource Locators (URLs).

Finder is a default MacOS file manager that always runs with MacOS system. In short, it is a home base for MacOS. Finder uses windows and icons to show the contents of the Mac hard drive, iCloud Drive and other storage devices. It's called the Finder because it helps a user to locate and organize your files.

Firmware is software that's embedded in a piece of hardware. You can think of firmware simply as "software for hardware." However, it's not an interchangeable term for software. Devices that you might think of as strictly hardware such as an optical drive, network card, TV remote, router, camera, or scanner all have software that's programmed into a special memory contained in the hardware itself. Manufacturers often release regular firmware updates to keep their hardware compatible with new media.

Five9 is a multi-tenant cloud contact center service or contact center as a service (CCaaS). Five9 manages Sunrun's omnichannel customer interactions including voice, SMS, chat, email, social, and video. The entire Five9 platform is delivered over the web, including the voice connection between the customer and the agent, as well as all the interfaces for controlling the call center for admins, supervisors and agents.

FORM (Field Operations Resource Management) Software is a mobile digital assistant for frontline teams. Sunrun's field operations team uses the platform to guide daily tasks, automate data collection, manage communication and give leaders real-time intelligence for audits, inspections, compliance, safety and quality.

In ServiceNow, a **form** displays information from one record in a data table.

Full Disk Access is a security feature introduced in macOS Mojave that requires applications to be given full permission to access user-protected files. If not enabled, some data on the Mac will not be accessible. In previous macOS versions, this permission was automatically given during installation.

Full-time equivalent (FTE) is a unit that indicates the workload of an employed person in a way that makes workloads comparable across various contexts. FTE is often used to measure a worker's involvement in a project, or to track cost reductions in an organization. An FTE of 1.0 is equivalent to a full-time worker, while an FTE of 0.5 signals half of a full workload.

A **furlough** is a mandatory temporary leave of absence from which the employee is expected to return to work or to be restored from a reduced work schedule.

A **Gantt chart** is a type of bar chart that illustrates a project schedule. Modern Gantt charts also show the dependency relationships between activities and the current schedule status.

Google Chrome is a cross-platform web browser developed by Google. As Sunrun's default browser for company applications, Chrome is also the main component of Chrome OS, where it serves as the platform for web applications.

You can add **Google Authenticator** as a **multifactor authentication (MFA)** option in Okta. When Google Authenticator is enabled as a factor, users who select it to authenticate are prompted to enter a time-based 6-digit code generated by the Google Authenticator app.

Google Groups allow you to communicate with colleagues, by sharing a common email address. Once a group has been created, you can use the group to set up chat rooms, invite all users to a Google Meet and share documents for collaboration. Permissions are tied to the group rather than the individual members. When a user joins a group, they will automatically get permission to view all items that the group has access to.

Sunrun's **Google Group Management Policy** standardizes and simplifies the process of creating Google Groups and non-human accounts while eliminating discrepancies during group creation. Additionally, it provides group owners with greater control over the groups for which they are responsible.

Identity and Access Management (IAM) is a framework of policies and technologies to ensure that the right users (in an enterprise) have the appropriate access to technology resources. IdM systems fall under the overarching umbrellas of IT security and data management. Identity and access management systems not only identify, authenticate and control access for individuals who will be utilizing IT resources but also the hardware and applications employees need to access.

Google Workspace is a collection of cloud computing, productivity and collaboration tools, software and products developed and marketed by Google. It was first launched in 2006 as Google Apps for Your Domain and rebranded as G Suite in 2016.

The Oracle Data Miner **graphical user interface (GUI)** is used for querying, browsing, editing, and managing Oracle databases.

A **group conversation** in ServiceNow Connect Chat is a conversation among three or more users.

A **Group Policy Object (GPO)** is a group of settings that are created using the Microsoft Management Console (MMC) Group Policy Editor. Group Policy is a feature of the Microsoft Windows NT family of operating systems that controls the working environment of user accounts and computer accounts. Group Policy provides centralized management and configuration of operating systems, applications, and users' settings in an Active Directory environment.

Hard drive encryption refers to the process of encoding data so that information on a computer's hard drive is transformed from plaintext to ciphertext, which makes the original information unreadable. Hard drive encryption uses a specific algorithm, or cipher, to convert a physical disk or logical volume into an unreadable format that cannot be unlocked by anyone without the secret key or password that was used to encrypt the drive. This prevents unauthorized people or hackers from accessing the information.

Hardware Warranty means a contractual agreement or service pack between Customer and Original Equipment Manufacturer (OEM) Vendor (i.e. Dell / Lenovo) for the repair or replacement of physical device hardware should it fail.

A **hotkey** is a keyboard key that when pressed by itself or in combination with other keys, carries out a function. Hotkeys provide convenient shortcuts to common tasks that are otherwise accessed through menu navigation.

Human resources (HR) is the department that is charged with finding, screening, recruiting and training job applicants, as well as administering employee-benefit programs. HR plays a key role in helping Sunrun deal with a fast-changing business environment and a greater demand for quality employees in the 21st century.

iCIMS is Sunrun's talent cloud platform used to create job requisitions for Human Resources (HR). The company name is an acronym that stands for Internet Collaborative Information Management Systems.

DocuSign provides Sunrun's **Illinois (IL) Rebates** Team to create Adjustable Block Program (ABP) documentation and send it securely. Illinois offers several incentives that make installing solar panels

uniquely beneficial, such as the Future Energy Jobs Act (FEJA) and Illinois's home solar energy system costs.

In the Incident Management Process (IMP), **impact** is the measure of the extent of potential damage the incident may cause. There are three levels of impact: high, medium and low.

An **incident** in ServiceNow generates a record (or a “ticket”) that can be tracked until service is restored and the issue is resolved. Each incident (or “ticket”) is identified as INCxxxxxxx. Incidents can be assigned to appropriate service desk members, who resolve the task and document the investigation. After the incident is resolved, you can manually close the incident.

In the Incident Management Process (IMP), defining the **incident category** is a vital step. Categorization involves assigning a category and at least one subcategory to the incident. This action allows the IT Service Desk to sort and model incidents based on their categories and subcategories while also allowing some issues to be automatically prioritized and resolved within SLAs.

In the Incident Management Process (IMP), **incident closure** occurs when the incident is considered closed, and the incident process ends.

In the Incident Management Process (IMP), **incident escalation** happens when an incident requires advanced support, such as sending an on-site technician or assistance from certified support staff; however, most incidents should be resolved by the first tier support staff and should not make it to the escalation step.

In the Incident Management Process (IMP), **incident lifecycle** is defined as unplanned interruptions or reductions in quality of IT services; the primary objective of incident management throughout the incident lifecycle is to restore service to users as quickly as possible. The incident lifecycle encompasses six stages: incident identification; incident logging; incident investigation and diagnosis; incident assignment or escalation; incident resolution; and incident closure.

Incident Management Process (IMP) is the practice of restoring services as quickly as possible after an incident. Common incident management activities include detecting and recording incident details; matching incidents against known problems; resolving incidents as quickly as possible; prioritizing incidents in terms of impact and urgency; and escalating incidents to other teams to ensure timely resolution.

In the Incident Management Process (IMP), **initial diagnosis** occurs when a customer describes his or her problem and answers troubleshooting questions.

In the Incident Management Process (IMP), **investigation and diagnosis** processes take place during troubleshooting when the initial incident hypothesis is confirmed as being correct. Once the incident is diagnosed, staff can apply a solution, such as changing software settings, applying a software patch or ordering new hardware.

iOS (formerly **iPhone OS**) is a mobile operating system created and developed by Apple Inc. exclusively for its hardware. It is the operating system that powers many of the company's mobile devices, including the iPhone and iPod Touch; the term also included the versions running on iPads until the name *iPadOS* was introduced with version 13 in 2019. It is the world's second-most widely installed mobile operating system, after Android.

An Internet Protocol (IP) address is a unique number assigned to each computer on a network. A computer or other device on the Internet can have a **static IP address**, which means it stays the same over time, or a **dynamic IP address**, which means the address can change over time.

Integrated Softphone provides embedded communications for inbound and outbound phone calls. It allows agents to make clear web-based voice calls as an alternative to desktop VoIP softphones or hard phones with the same rich telephony features, all without ever leaving the browser. Integrated Softphone is supported in MAX, Agent for Oracle Service Cloud, and Agent for Salesforce.

An **International Mobile Equipment Identity (IMEI)** number is a unique number for identifying a device on a mobile network. Think of it as a mobile device's social security number. It has 15 digits and is assigned to every GSM (Global System for Mobiles) phone. The IMEI number is helpful when a mobile device is lost or stolen, as it can be used to disable the device from further use. A mobile carrier can deny a device based on its IMEI number and can contact other carriers to do the same. The IMEI number also provides other details about a mobile device, including the brand and model, year of release and specifications.

Internet Explorer is a deprecated series of graphical web browsers developed by Microsoft and included in the Microsoft Windows line of operating systems, starting in 1995. It was first released as part of the add-on package Plus! for Windows 95 that year. Microsoft Edge has Internet Explorer mode ("IE mode") built in, so you can access those legacy Internet Explorer-based websites and applications straight from Microsoft Edge. With Microsoft Edge capable of assuming this responsibility and more, the Internet Explorer 11 desktop application will be retired and go out of support on June 15, 2022, for certain versions of Windows 10.

IMP Chat is the official process location for reporting IT Service Delivery outages that affect key functions such as network, applications or other services. IMP Chat can be accessed [HERE](#).

Inside Sales Consultant (ISC) refers to Sunrun's business organization composed of solar consultants who work over the phone, typically from Sunrun's Scottsdale-based call center.

An **instance** is a single copy of the software running on a single physical or virtual server. If you run two copies of the software on the same physical or virtual server, that counts as two instances. When you run two copies of the software on two different physical or virtual servers, that also counts as two instances.

Sunrun's **Information Security Team (InfoSec)** maintains the practices, policies and principles to protect Sunrun's digital data and other kinds of information. InfoSec applies information security to guard digital information as part of Sunrun's overall cybersecurity program.

IT Asset Disposition (ITAD) is the business of recycling, repurposing, repairing or reselling of outdated, unviable or undesired equipment in an environmentally safe and responsible manner.

IT Equipment Audit is the process responsible for ensuring that Sunrun assets required to deliver services are properly controlled and that accurate and reliable information about those assets is available when and where it is needed.

IT Service is a service provided by an **IT Service Provider**. Sunrun's IT Service Desk provides IT services made up of a combination of information technology, people and processes. Sunrun's customer-facing IT service directly supports the business processes of Sunrun employees, and its service level targets are defined in service level agreements (SLAs). Sunrun's IT Services consist of supporting the design, implementation and maintenance of all the components that are required to fulfill business objectives for Sunrun employees.

Sunrun's **IT Service Delivery Tier II - Hardware** Team supports all layers of desktop engineering, including asset management, deployment and repair. Escalation/SME: Zach Miller

Sunrun's **IT Service Delivery Tier II - Applications** Team is responsible for managing the resolution of application and system issues that arise across Sunrun's internal business structure. Escalation/SME chart can be found [here](#).

Sunrun's **IT Service Desk agents** support customers with IT-related problems, functioning as the first point of contact (POC) for internal customers. They resolve issues and address complaints and escalate complex matters to the appropriate departments. Problem-solving is key for the ITSD agent, who works under the supervision of a team leader to provide customer support over the phone, via email or through live chat.

Ivanti Portal Manager delivers apps, documents and links to end users so they can install items that are approved for use or required for that user's hardware. When the end user launches Portal Manager, it synchronizes with the policy server.

Java is a general-purpose, class-based, object-oriented programming language designed for having lesser implementation dependencies. It is a computing platform for application development.

The **Java Control Panel** is a multipurpose control panel. It allows you to view and set a wide range of parameters controlling how, or if, Java technology runs on your computer.

A **job requisition**, or requisition to hire, is a request to fill a job—permission to start the hiring process. A job description describes the elements of the job—the knowledge, skills and abilities applicants will need to possess.

Jira is a software application used for issue tracking and project management. The tool has become widely used by agile development teams to track bugs, stories, epics, and other tasks. The product name is a truncation of *Gojira*, the Japanese word for Godzilla.

Line Printer Daemon (LPD) is a general TCP/IP network printing protocol for submitting print jobs to a remote printer.

K-O

The **Key Management Service (KMS)** is an activation service that allows Sunrun's IT experts to activate systems within Sunrun's own network, eliminating the need for individual computers to connect to Microsoft for product activation. It does not require a dedicated system and can be easily co-hosted on a system that provides other services.

A **Knowledge Base** contains articles that provide users with information such as self-help, troubleshooting and task resolution. Within Sunrun's ServiceNow, the knowledge management application enables sharing of information in knowledge bases.

A **knowledge base article (KBA)** is a piece of online documentation that answers a frequently asked question or provides instructions for solving a problem that customers commonly run into. Common knowledge base article types include informational articles, how-tos, troubleshooting guides and FAQs.

Knowledge blocks are reusable pieces of content secured by user criteria, and they make up the body of each Runbook published in a knowledge base. Knowledge blocks simplify knowledge authoring for writers

and knowledge consumption for readers. The user criteria controls which users can read or cannot read the block content in a Runbook or search, enabling users to more easily view content that is relevant to them.

Within League Live (and following Spark Academy), quarterly **League Levels** competitions provide regular building-block opportunities for sales and revenue. Levels include Watt, Kilowatt, Megawatt, Gigawatt, Terawatt and Yottawatt. Top performers among retail and field sales representatives compete for the ultimate prize, an international trip.

League Live is Sunrun's internal sales platform for the company to communicate, motivate, incentivize and develop its sales force. As part of Sunrun's door-to-door sales organization, League Live allows sales representatives to view their sales stats, sales volume and revenue flow with features like Scorecard, [Dashboard](#) and Leaderboard.

Sunrun sales representatives visit **League Store (Locker Room)** to purchase Sunrun gear with League Store Credits earned through sales competitions like Spark and Watt Games. Sales representatives may also purchase gear with a personal credit card.

Sunrun's **Learning Experience Team (LXT)** develops performance-improvement solutions that streamline every line of its business functions. LXT supports Sunrun's workforce by developing individual job skills needed to further our organization's goals.

A **learning management system (LMS)** is a software application for the administration, documentation, tracking, reporting, automation and delivery of educational courses, training programs or learning and development programs.

Sunrun's **Learning Portal (Litmos LMS)** is where all HR and job training is hosted for end-user consumption. This should be automatically provisioned in Okta when the employee is onboarded. IT Service Desk Tier I agents can masquerade as an end-user in Learning Portal to see what they have completed. Some training must be completed in order to gain access to certain applications. For example, if an employee does not complete their Data & Security Training on time, they will be locked out until completion and submission of their certificate of completion.

A Sunrun employee may need a **Leave of Absence (LoA)** for their own medical condition or for a covered family member. The employee must email Leaves@sunrun.com, cc'ing their manager and Talent BP, and contact Sunrun's leave vendor, Prudential (*Prudential will review the employee's leave or disability accommodation eligibility and prepare notices and documents that will be sent to the employee by a dedicated Prudential representative. Using this tool also helps Sunrun keep proper records of leave requests*). Employees will be able to login to SSO while on a leave of absence; however, they will only have access to Workday, Benefits, and the SunrunNow tiles. Employees who return from LoA early, or who

request access to their accounts must reach out to benefits at leaves@sunrun.com in order to update their status within Workday or provide authorization for the employee to have account access. The Technology department will not manually reactivate accounts. Employees on leave are not supposed to be working as per the HR department.

Lightmile is Sunrun's proprietary cloud-based automatic solar project design generation tool that allows users to create optimized designs interactively and without specialized training. The system generates shade analysis, energy simulations, bills-of-material, system costs, proposals and contracts. Unlike existing tools in the industry, Lightmile automatically generates engineered and optimized designs continuously throughout the development cycle in response to changing conditions.

Lightweight Directory Access Protocol (LDAP) is an open and cross platform protocol used for directory services authentication. LDAP provides the communication language that applications use to communicate with other directory services servers. Directory services store the users, passwords, and computer accounts, and share that information with other entities on the network.

Line Printer Daemon (LPD) is a general TCP/IP daemon that is used for receiving and spooling print jobs on a print server. The Line Printer Daemon (LPD) print server might be connected directly to the print device, or it might be a network print device that supports LPD.

Local Administrator Password Solutions (LAPS) is a Microsoft based product which is used in conjunction with Microsoft Windows, and Active Directory to provide centralized control over passwords for Local Administrator accounts on organizational Windows devices. LAPS is used by Sunrun Technology Operations to manage devices through the use of the local administrator account.

Location Services on a mobile device allows location-based apps and websites (including Maps, Camera, Safari, and other Apple and third-party apps) to use information from cellular, Wi-Fi, and Global Positioning System (GPS) networks to determine your approximate location. To use features such as these, you must enable Location Services on your device and give your permission to each app or website before it can use your location data.

A **local area network (LAN)** is a collection of devices connected together in one physical location, such as a building, office or home. A LAN can be small or large, ranging from a home network with one user to an enterprise network with thousands of users and devices in an office or school. Regardless of size, a LAN's single defining characteristic is that it connects devices that are in a single, limited area.

Login credentials enable users to log in and verify their identities to online accounts on the internet. User credentials are typically a username and password combination used for logging in to online accounts.

MacOS is a proprietary operating system developed and marketed by Apple Inc. since 2001. It is the primary operating system for Apple's Mac computers. Within the market of desktop and laptop computers it is the second most widely used desktop OS, after Windows and ahead of Chrome OS.

Within a few Sunrun applications, Tier 1 Service Desk agents have the ability to **masquerade** as a user, allowing them to switch user accounts and use the application as another user and then switch back to their own user account at any time. Only admins with the correct permissions can masquerade as other users.

A **Media Access Control (MAC) Address** is a 12-digit hexadecimal number that is most often displayed with a colon or hyphen separating every two digits (an octet), making it easier to read. (Example: A MAC address of 2c549188c9e3 is typically displayed as 2C:54:91:88:C9:E3 or 2c-54-91-88-c9-e3.) Just like each house has it's own postal address, every device connected on a network has a Media Access Control (MAC) address that uniquely identifies it. The MAC address is tied to the Network Interface Controller (NIC), a subcomponent of the larger device. The NIC is where you make your physical connection to the network by plugging in an Ethernet cable or connecting to a WiFi signal.

Malware is any software intentionally designed to cause damage to a computer, server, client, or computer network. By contrast, software that causes unintentional harm due to some deficiency is typically described as a software bug.

My Agent eXperience (MAX Agent) is a unified desktop omnichannel agent interface that enables Service Desk agents to handle virtually any interaction channel. MAX Agent is a single interface that not only unites handling digital and voice channels but also provides IT Service Desk management with access to Workforce Management (WFM) and Quality Management (QM) tools they use to facilitate global improvements for Sunrun's IT Service Delivery Team.

In an internal service level agreement (SLA) will often use technical terms to quantify service levels such as **mean time between failures (MTBF)** and **mean time to recovery (MTTR)**.

Cisco **Meraki** is a cloud-managed IT company whose products include wireless, switching, security, enterprise mobility management (EMM) and security cameras, all centrally managed from the web.

Mercury is a Vivint Solar platform where sales representatives can access additional commission reports and account details. It is also where sales representatives can download the Neo sales tool on an iOS device.

A **microapp** is an interactive digital asset that enables immersive learning experiences. It works as an interactive software module designed to perform like a fully coded application or website.

Microsoft Installer (MSI) is an installer package file format used by Windows. Its name comes from the program's original title, Microsoft Installer, which has since changed to Windows Installer. MSI files are used for installation, storage, and removal of programs. The files are contained in a package, which is used with the program's client-side installer service, an .EXE file, to open and install the program.

Microsoft Office is a suite of applications for business productivity, including Word, Excel, PowerPoint, Outlook and others. A *suite* is a group of applications that are designed to work well together and are designed around a common interface. It is less expensive to buy a suite than it is to buy the individual applications separately.

Microsoft Windows, commonly referred to as Windows, is a group of several proprietary graphical operating system families, all of which are developed and marketed by Microsoft. Each family caters to a certain sector of the computing industry.

Multi-factor authentication (MFA), encompassing **two-factor authentication**, or **2FA**, along with similar terms) is an electronic authentication method in which a user is granted access to a website or application only after successfully presenting two or more pieces of evidence (or factors) to an authentication mechanism: knowledge (something only the user knows), possession (something only the user has), and inherence (something only the user is). MFA protects user data—which may include personal identification or financial assets—from being accessed by an unauthorised third party that may have been able to discover, for example, a single password.

A **multifunction printer (MFP)** is an office machine which incorporates the functionality of multiple devices in one, so as to have a smaller footprint in a business setting, or to provide centralized document management/distribution/production in a large-office setting.

Mobile data is internet content delivered to mobile devices such as smartphones and tablets over a wireless cellular connection. Mobile data plans offer varying amounts of data transfer per month for a range of rates.

Modbus is a communication protocol for transmitting information between electronic devices over serial lines or via Ethernet, and Sunrun uses it for SolarEdge communication automation. An open protocol, Modbus TCP (also known as Modbus TCP/IP) uses a client/server architecture.

MyApps portal is a web-based portal for an end user's Active Directory (AD) account to launch applications. Think of it as a set of “visual bookmarks” that launch applications for which a user has been granted permissions to access.

MyFax is Sunrun's eFax solution that allows employees to send and receive faxes by email or online from their computer, tablet or smartphone. The fax number is a real local or toll free fax number.

Sunrun's **network administrators** are responsible for keeping the organization's computer network up-to-date and operating as intended. Since Sunrun employs a significant collection of multiple computers and software platforms for its daily business needs, it's necessary to have network admins to coordinate and connect the different systems.

A **network interface card (NIC)** is a hardware component, typically a circuit board or chip, which is installed on a computer so it can connect to a network. An NIC provides a computer with a dedicated, full-time connection to a network. It implements the physical layer circuitry necessary for communicating with a data link layer standard, such as Ethernet or Wi-Fi. Each card represents a device and can prepare, transmit and control the flow of data on the network. It is also called network interface controller, network adapter or LAN adapter.

A **Network Operations Center**, often called a **NOC** (pronounced "knock"), is typically a centralized location where the network operation staff provides supervision, monitoring and management of the network, servers, databases, firewalls, devices and related external services. This infrastructure environment may be located on-premises and/or with a cloud-based provider.

Network Operations (NetOps) refers to the activities performed by Sunrun's internal networking staff or third parties that they leverage to monitor, manage, and respond to alerts on their network's availability and performance. NetOps staff that have primary responsibilities for network operations are called network operations analysts or network operations engineers.

Neo is Vivint Solar's comprehensive sales support tool that grants access to many resources used in the solar sales process, from finding accounts to ushering them to final install. Neo's menu includes the Doors canvassing tool, The Trade training program, Presentation custom sales visuals, account processing and document submission, sales help contact, the Mercury web portal and the Ignite recruit onboarding tool.

NICE inContact is a unified customer experience cloud contact center software that manages omnichannel routing, customer analytics and workforce engagement within a single platform. Nice inContact software helps Sunrun's IT Service Desk Team to maximize the quality of service it can provide to Sunrun's internal customers.

NICE ScreenAgent is a service that runs on agent desktops and provides both audio and screen recording of each call the agent manages. Supervisors and evaluators use ScreenAgent to monitor an agent's activity during customer interactions for quality assurance and coaching purposes.

Nitro Pro is an application used to create, edit, sign, and secure Portable Document Format (PDF) files and digital documents. It is offered to Sunrun users as an alternative PDF software to Adobe Acrobat.

Nomenclature is a system of *names* or terms, or the rules for forming these terms in a particular sector, like Information Technology.

OBi IP phones are VoIP phones designed from the outset to support High Definition (HD) voice calling. OBi phones are used at desktop workstations in Sunrun's corporate office locations.

In Salesforce, **objects** are database tables that allow the user to store data specific to Sunrun. There are two type of objects in Salesforce: standard objects and custom objects. CAD objects generated in conjunction with Solmetric SunEye are custom objects.

Office 365 is a Software as a Service (SaaS) solution that combines the traditional Microsoft Office desktop applications, Microsoft application services, and some new productivity services, all of which are enabled as consumable services from within Microsoft's Azure cloud platform. Office 365 contains the same core desktop applications as the traditional versions of Microsoft Office, such as Word, Excel, PowerPoint and Outlook, as well as a suite of other apps and online services for cloud file storage, secure communication, and collaboration. Tools such as Planner, OneDrive, Exchange, SharePoint, Yammer and Microsoft Teams all come together to provide an unparalleled user experience.

Sunrun's **offshore employees** are those who are neither U.S. citizens nor a U.S. residents for U.S. tax purposes. More than 1,100 Sunrun offshore employees work as contractors in Colombia, India and Philippines.

Okta is an identity management service built for the cloud but compatible with many on-premises applications. With Okta, IT can manage any employee's access to any application or device. Okta features provide **Single Sign-On (SSO)**, **Active Directory (AD)** integration, the centralized deprovisioning of users, **multifactor authentication (MFA)**, mobile identity management, and flexible policies for organization security and control.

An **Okta admin** (administrator) is responsible for maintaining all aspects of the end-user experience in an organization. What most Okta admins have in common is their access to the Admin Console, where they perform administrative tasks like user lifecycle management, application provisioning and org customization. The **Okta Administrator Dashboard** summarizes org usage and activity and notifies you of any problems or outstanding work to be completed. The navigation panel on the side provides shortcuts to the most commonly performed tasks.

The **Okta End-User Dashboard** is a platform that offers secure access to your enterprise applications and information. From the dashboard, you can also manage your Okta account, read notifications from your administrator as well as organize or request apps.

On mobile devices, a user can launch the dashboard from **Okta Verify**. Access to applications is based on single **sign-on (SSO) technology** through which a user may maintain his or her password, meaning that if an app requires you to change the password, you should do so within the dashboard. Then, Okta automatically passes on access through a token, so you don't need to manually make a change when the app requires updates.

Okta Verify is an **MFA** factor and authenticator app developed by Okta. The app is used to confirm a user's identity when they sign in to their Okta account. After an end user installs the app on their primary device, they can verify their identity by approving a push notification or by entering a one-time code.

Through **Okta Verify with Push**, users verify their identity with a single tap on their mobile device without the need to type a code. Users access their apps easily while retaining the same higher level of security. This feature is available for iPhone, Android, and Windows devices.

At Sunrun, **onboarding** begins once a job candidate agrees to accept a job. It involves all the steps needed to get a new employee successfully deployed and productive. **Offboarding** is the reverse of onboarding, and it involves separating an employee from the company. This can include a process for sharing knowledge with other employees.

An **operating system (OS)** is the most important software that runs on a computer. It manages the computer's memory and processes, as well as all of its software and hardware. It also allows a user to communicate with the computer without knowing how to speak the computer's language. Without an operating system, a computer is useless.

In Salesforce, an **opportunity** is an object that refers to a sales lead that is qualified and has an appointment set.

Oracle is Sunrun's Enterprise Resource Planning (ERP) software. It is integrated into and is used by many of Sunrun's departments, including Human Resources, Customer Care, Sales and Information Technology.

Oracle RF-Smart is a strategic Mobile Supply Chain partner for Oracle SCM Cloud applications including Inventory Cloud, Manufacturing Cloud, Maintenance Cloud, Financials Cloud, Quality Cloud and more. It is used in tandem with Zebra printers and scanners at Sunrun's WMS warehouse locations.

The term **Original Equipment Manufacturer (OEM)** originally referred to a company that supplied equipment to another company to resell or incorporate into their own equipment for sale. OEM is now used

to refer to a product that is acquired by the company to be reused or incorporated into another product using the reseller's brand name. Sometimes, OEM is used to refer to a company that makes the end product using parts from another manufacturer. The OEM is the company that makes subsystems or parts that are used by other companies to make the end product. An example is the Acme Manufacturing Company that makes power cables that are used in Dell computers; in this case Acme manufacturing Co. is the OEM.

Orion Looker is a business intelligence (BI) tool that helps Sunrun's Construction Management, Operations and Sales teams develop insightful visualizations for solar components such as batteries and inverters. It offers a user-friendly workflow, is completely browser-based (eliminating the need for desktop software), and facilitates dashboard collaboration.

P-T

Pacing happens when you mirror the body language or verbal expression of another person as a way to build agreement and rapport.

Portable Document Format (PDF) is a file format developed to present documents, including text formatting and images, in a manner independent of application software, hardware and operating systems. Based on the PostScript language, each PDF file encapsulates a complete description of a fixed-layout flat document, including the text, fonts, vector graphics, raster images and other information needed to display it.

PDQ Deploy is a software deployment tool that Sunrun's IT teams use to automate patch management for updating 3rd party software, deploying scripts and making vital system changes.

PhishAlarm is Sunrun's email add-in which allows a user to easily report a potential phishing email. With the click of the Report Phish button, the suspicious email will be moved from the user's inbox to the junk folder and forwarded to Sunrun's IT team for analysis.

Phishing is an attempt by cybercriminals posing as legitimate institutions, usually via email, to obtain sensitive information from targeted individuals.

A **Photovoltaic (PV) System**, or solar power system, is an electric power system designed to supply usable solar power by means of photovoltaics. It consists of an arrangement of solar panels and a solar inverter, as well as mounting, cabling and other electrical accessories to set up a working system.

In computing, a **plug-in** is a software component that adds a specific feature to an existing computer program. When a program supports plug-ins, it enables customization.

A **point of contact (POC)** or single point of contact is a person or a department serving as the coordinator or focal point of information concerning an activity or program. A POC is used in many cases where information is time-sensitive and accuracy is important.

Polycom, now a part of Plantronics, develops video, voice and content collaboration and communication technology that is used in Sunrun's corporate offices.

Powerwash is a Chromebook feature that erases everything on the device like a factory reset. On Sunrun's Chrome devices, Powerwash is used to clear user data for reprovisioning or if the device experiences a major glitch that requires a factory reset.

A **print queue** is a list of printer output jobs held in a reserved memory area. It maintains the most current status of all active and pending print jobs.

In computer networking, a **print server** is a type of server that connects printers to client computers over a network.

Print Suite Bridge (PSB) is a standalone printing and labeling solution that provides the easiest way to get data onto labels without workflow modifications. At each of Sunrun's WMS warehouse locations, PSB routes print jobs from RF-Smart scanners to Zebra barcode printers.

Priority is defined as a function of urgency as determined by impact. Priority is typically assigned by measuring both the urgency of the incident (how quickly the business needs a resolution) and the level of impact it is causing. An indication of impact is often (but not always) the number of users being affected.

IT **procurement** is a series of activities and procedures for sourcing IT assets. With its IT procurement policy and procedure, Sunrun can seamlessly execute its projects with the critical IT products and services by its side. A typical IT procurement process involves determining IT requirements, communicating with suppliers, administering procuring contracts, managing the assets and quality assurance.

A **problem** is defined as the unknown cause of one or more incidents.

Problem Management ensures identification of problems and performs Root Cause Analysis. It also ensures that recurring incidents are minimized and problems can be prevented.

Provisioning is the enterprise-wide configuration, deployment and management of multiple types of IT system resources. In layman's terms, it means "providing" or making something available. At Sunrun, various departments oversee the provisioning process depending on what's being provisioned; the

provisioning process is necessary to monitor user and customer access rights and privacy while ensuring enterprise resource security.

Pulse Secure VPN provides secure, authenticated access for remote and mobile users from any web-enabled device to Sunrun's corporate resources.

For Sunrun's IT Service Desk agents, building **rappport** with internal customers involves alleviating their frustrations, creating a common bond of trust, practicing empathy and showing a genuine interest in providing resolution for the issue at hand.

In ServiceNow, a table is a collection of **records** in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes, such as Incident, Problem, and CMDB.

Remote Desktop refers to a software or operating system feature that allows a personal computer's desktop environment to be run remotely on one system (i.e., Windows Remote Desktop, Chrome Remote Desktop, etc.) while being displayed on a separate client device.

Remote support uses IT tools and software that enable an IT technician or a support representative to connect to a remote computer from their consoles via the Internet and work directly on the remote system.

Request Management is the process of managing all types of requests made by end users. Sunrun's ServiceNow platform organizes non-billable request types in the Service Catalog by their functional category, allowing customers to easily find services.

In the incident management process, **resolution and recovery** is when the IT Service Desk confirms that a customer's service has been restored to the required SLA level.

Retail Solar Advisor (RSA) refers to Sunrun's lead generator, qualifier and appointment setter in a sales transaction. The RSA is physically situated in retail properties where Sunrun has a relationship with the retailer.

Robotic Process Automation (RPA) is a software technology that makes it easy to build, deploy, and manage software robots that emulate humans actions interacting with digital systems and software.

In a computer file system, the **root directory** is the first or top-most directory in a hierarchy. It can be likened to the trunk of a tree, as the starting point where all branches originate from.

A **Runbook** provides Sunrun employees a self-support guide for troubleshooting technology issues. It also provides Sunrun's IT support professionals an in-depth, comprehensive overview of routine procedures and operations for IT Service Delivery offerings.

Salesforce is Sunrun's customer relationship management (CRM) platform. Salesforce at Sunrun supports marketing, sales, commerce, service and IT teams as they work together to keep both internal and external customers happy. Salesforce is the backbone for Sunrun's sales process because everything customer-related points to Salesforce.

NICE **ScreenAgent** is a service that runs on agent desktops and provides the screen recording feature within InContact, which supports the ability to record agent workstation activity and to view agent desktops in near-real time.

Sunrun's **Security & Compliance** Team develops and measures security standards while enabling business autonomy and agility. They deliver value through identification of threats, assessment of risk, expert consulting and provision of foundational security services to prevent, detect and respond to disruptions.

A **security question** is form of shared secret used as an authenticator used widely online. As a form of self-service password reset, security questions have reduced information technology help desk costs. Whereas a human customer service representative may be able to cope with inexact security answers appropriately, computers are less adept. As such, users must remember the exact spelling and sometimes even case of the answers they provide.

A **Secure Sockets Layer Virtual Private Network (SSL VPN)** is a virtual private network (VPN) created using the Secure Sockets Layer (SSL) protocol to create a secure and encrypted connection over a less-secure network, such as the Internet. It allows a user to establish a secure, encrypted connection between the public internet and a corporate or institutional network and enables individual users to access an Sunrun's network, client-server applications and internal network utilities and directories without the need for specialized software.

Sunrun's **Security Risk Intelligence (SRI)** Team supports the IT organization's risk management by analyzing current operations and understanding underlying security risks in day-to-day business.

A **Security Personal Identification Number (Security PIN)** is a numeric or alphanumeric string that is used to authenticate a person to a system. The dominant use cases for PINs are financial services transactions such as at the Point of Sale (PoS) or at a bank's Automated Teller Machine (ATM).

Sentinel is a communications gateway intended to improve Photovoltaic (PV) System communication for new installs and retrofit accounts. It connects to inverters & batteries via Ethernet, communicates with the customer's home router via WiFi and switches to cellular if connectivity is lost.

SentinelOne is Sunrun's latest Endpoint Security platform. It is a cloud-based solution that manages processes related to the entire threat lifecycle for providing endpoint security. Key features include behavioral analytics, activity log, whitelisting/blacklisting and document management.

A **serial number** is a unique number assigned by a manufacturer to help identify an individual device, like a phone, tablet or TV. For example, an iPhone's serial number will be different from every other phone Apple has made. Serial numbers make it easier for manufacturers to organize and keep track of their products.

In computing, a **server** is a piece of computer hardware or software that provides functionality for other programs or devices, called "clients". This architecture is called the client-server model.

Google Chrome can be configured with **service handlers** to enable email and calendar links to open in a Chrome browser. With a web page, certain types of special links known as protocols can open programs or invoke specific actions known as handlers.

An internal **service level agreement (SLA)** is used to maintain a level of service internally, within an organization, rather than with an external party. Internal SLAs may apply to help desk services, network or application availability and performance, and any other internal processes. When it comes to the level of service as defined in a contract, such service levels should be specific and measurable. Otherwise, measuring service will be difficult, as well as rewarding good service and penalizing bad service. To this end, an SLA will often use technical terms to quantify service levels such as mean time between failures (MTBF) and mean time to recovery (MTTR).

ServiceNow is a cloud-based company that provides software as a service (SaaS) for Sunrun's IT Service Delivery and technical support. ServiceNow houses Sunrun's IT Knowledge Bases and hosts its IT ticketing system.

In ServiceNow, the **Service Portal** is a front-end portal framework that provides self-service experiences for Sunrun's customers and employees. It interacts with parts of the ServiceNow Platform so users can access specific platform features using Service Portal.

A **service tag** is unique to each device or system that it identifies, and it allows the manufacturer of the system to immediately know what hardware is configured on it. When entered on the device manufacturer's website, the service tag allows users to quickly find drivers for it, among other things.

Session Initiation Protocol (SIP) is a protocol used in VoIP communications, allowing users to make voice and video calls.

A **session key** is a single-use symmetric key used for encrypting all messages in one communication session. A closely related term is content encryption key, traffic encryption key, or multicast key which refers to any key used for encrypting messages, contrary to other uses like encrypting other keys. BeyondTrust Remote Support uses a session key to connect an ITSD agent to a customer's device remotely.

A **SIM card**, also called a subscriber identity module or subscriber identification module, is a small memory card that contains unique information that identifies it to a specific mobile network. This card allows subscribers to use their mobile devices to receive calls, send SMS messages, or connect to mobile internet services. A SIM card contains a unique serial number (ICCID), international mobile subscriber identity (IMSI) number, security authentication, as well as ciphering information and temporary information related to the local network.

Simple Network Management Protocol (SNMP) is a networking protocol used for the management and monitoring of network-connected devices in Internet Protocol networks. The SNMP protocol is embedded in multiple local devices such as routers, switches, servers, firewalls, and wireless access points accessible using their IP address. SNMP provides a common mechanism for network devices to relay management information within single and multi-vendor LAN or WAN environments. It is an application layer protocol in the OSI model framework.

A **single point of contact (SPoC)** is one person or department that handles all requests and inquiries. They will be in charge of the day-to-day communication, management, and the rapid resolution of service requests and claims.

Single Sign-On (SSO) means a user doesn't have to sign in to every application they use. The user logs in once and that credential is used for other apps too. SSO-based authentication systems are often called "modern authentication". Modern authentication and single sign-on fall into a category of computing called Identity and Access Management (IAM). SSO makes it possible for users to navigate between various web apps without having to sign in multiple times.

Sunrun's **Strategic Information Systems (SIS)** Team supports the IT organization's risk management by managing and developing information systems that respond to corporate business initiatives.

Skedulo is Sunrun's mobile workforce management solution used to manage processes like assigning and scheduling work orders, dispatching workers to new assignments, communicating with field workers on the job, managing product inventory and collecting data from the field.

Software as a Service (SaaS) is a software licensing and delivery model in which software is licensed on a subscription basis and is centrally hosted. SaaS is also known as "on-demand software" and Web-based/Web-hosted software.

SolarEdge partnered with Tesla Motors to develop a storage and backup power solution used in Sunrun's residential systems. Using SolarEdge's direct current (DC) optimized inverter and Tesla's automotive-grade battery technology, the solution requires only a single SolarEdge inverter to manage both power and storage functions. The system is designed for efficient, outdoor installation and includes remote monitoring and troubleshooting to keep operations and maintenance costs low.

A **solar inverter** is a type of electrical converter that converts the variable direct current (DC) output of a solar panel into a utility frequency alternating current (AC) that can be fed into a commercial electrical grid or used by a local, off-grid electrical network.

Sophos is an antivirus, malware removal and management software installed on all Sunrun computers. Sophos is currently used on Vivintsolar (Orange) devices, as opposed to Sunrun (Blue) devices in WorkspaceOne (WSO). When a user attempts to sign into a device incorrectly with too many attempts, the hard drive will lock to safeguard its data and information. Then, the device will ask for the Bitlocker Recovery Key. To unlock the drive, a key will have to be researched in Sophos. To find the key, the ITSD agent should search via the PC Name or the End User.

SMS (Short Message Service) is a text messaging service component of most telephone, Internet, and mobile device systems. It uses standardized communication protocols that let mobile devices exchange short text messages. is a text messaging service component of most telephone, Internet, and mobile device systems. It uses standardized communication protocols that let mobile devices exchange short text messages.

Snipaste is a snipping tool that allows a user to pin a screenshot back onto the screen. Press F1 to start snipping, and then press F3 to paste it as a floating window. The screenshot can also convert text or color info in the clipboard into a floating image window.

Solmetric SunEye is the world-leading shade measurement tool for solar site assessment. This hand-held electronic tool measures the available solar energy by day, month and year with the press of a button by determining the shading patterns of a particular site.

The Sarbanes-Oxley Act of 2002, often simply called **SOX Compliance** or Sarbox, is U.S. law meant to protect investors from fraudulent accounting activities by corporations. It also covers issues such as auditor independence, corporate governance, internal control assessment, and enhanced financial disclosure.

A **SOX Application Access Request** is a legal process for requesting access to a SOX-compliant application. It's only needed when an employee has a previously-assigned role in Salesforce but needs to

have that role changed/upgraded. Otherwise, any other request in Salesforce will follow the typical access request procedures.

Within League Live, **Spark Academy** encompasses a comprehensive sales training plan as well as a sales competition that takes place during the first 60 days of a Sunrun sales representative's career with the company. During this time, sales representatives take part in Watt Games, working through the training, sales and retail academies to learn how to be an effective sales representative. Milestones earn participants the ultimate prize, the Spark trip. When a sales representative finishes Spark Academy, they move on to quarterly League Levels competitions.

SpiceCSM is a web based on-demand Customer Engagement Hub (CEH) platform used to increase the efficiency of Sunrun's IT Service Desk agents by connecting ServiceNow systems, Sunrun employees and Service Desk processes while simultaneously orchestrating interactions to improve the customer experience. It provides an end-to-end contact center solution where data can be fed via automated ServiceNow and InContact processes defined in SpiceCSM's workflow engine, and the caller can easily engage with live agents without breaking the contact flow.

SPlat (Sales Platform) is Sunrun's sales platform and presentation tool that sales representatives use throughout the consultation steps and also to guide the homeowner through next steps in the process. It supports the sales representative with the design, product pricing and checkout process.

Sunrun field technicians encounter a network's **Service Set Identifier (SSID)**, or network name, most often when they are using a mobile device to connect to a wireless network. Most often, they are provisioning a Sentinel in ClickMobile, and the need a network's SSID to configure the device.

A **subfolder** is a folder stored inside another folder. Sunrun's Legal Department uses subfolders in Google Drive to store call recordings for legal purposes.

The **subject matter expert (SME)** provides the knowledge and expertise in a specific subject, business area, or technical area for a project/program. SMEs are typically found among those who have been in their roles for a long enough period of time for their knowledge and skills to be 'second nature'. A SME should know their job well enough that they rarely have to look up information and, if they do have to, they know exactly where to find the information.

An applications **suite** is a group of applications that are designed to work well together and are designed around a common interface.

Sunrun Direct refers to Sunrun's business organization that deals in solar systems sold and installed by Sunrun.

The Windows **system tray** is located in the Windows Taskbar, at the bottom right corner of your computer screen. It contains miniature icons for easy access to system functions such as antivirus settings, printer, modem, sound volume, battery status, and more.

In ServiceNow, a **table** is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes, such as Incident, Problem, and CMDB.

Talent refers to job seekers, candidates or a population of employees. Human Resources (HR) specialists focus on talent acquisition, an ongoing recruiting strategy to find, attract and hire top talent that continues to make Sunrun successful.

An HR **Talent Business Partner (Talent BP)** is an experienced human resource professional who works directly with an organization's senior leadership to develop and direct an HR agenda that closely supports organizational goals.

Tasks in Salesforce provides to-do items that needs to be completed by a user to whom the task is assigned. Tasks can be easily related to leads, contacts, campaigns, contracts.

Task Manager, previously known as Windows Task Manager, is a task manager, system monitor and startup manager included with Microsoft Windows systems. It is primarily a system monitor program used to provide information about the processes and applications running on a computer, as well as the general status of the computer. Some implementations can also be used to terminate processes and applications, as well as change the processes' scheduling priority.

In ServiceNow, a **template** simplifies the process of submitting new records (incident, knowledge, etc.) by populating fields automatically. To use a template, populate the most-used fields for a specific table, save it as a template and then make the template accessible to your users.

The MacOS **Terminal** allows you to control a MacOS device using a command prompt. Terminal is a Mac command-line interface that allows a user to interact directly with MacOS using a command prompt.

A **thin client** is a computer that runs from resources stored on a central server instead of a localized hard drive. Thin clients work by connecting remotely to a server-based computing environment where most applications, sensitive data and memory are stored.

Tiled is a no-code, interactive content platform for Sunrun's sales team. Tiled is integrated into Neo and is used to present sales offers to customers.

A **token** is a highly secure format used to transmit sensitive information between two parties in a compact and self-contained manner. Tokens are often used to strengthen authentication processes, whether that be within a website or application.

The **Transmission Control/Internet Protocol (TCP/IP)** is one of the main protocols of the Internet protocol suite. It originated in the initial network implementation in which it complemented the Internet Protocol (IP). Therefore, the entire suite is commonly referred to as TCP/IP. TCP provides reliable, ordered and error-checked delivery of a stream of octets (bytes) between applications running on hosts communicating via an IP network. Major internet applications such as the World Wide Web, email, remote administration, and file transfer rely on TCP, which is part of the Transport Layer of the TCP/IP suite.

Triage is the procedure of assigning levels of priority to tasks or individuals to determine the most effective order in which to deal with them. Sunrun's Technology Operations (TechOps) Team constantly triages issues to decide which problems are most urgent.

Troubleshooting is a logical, systematic search for the source of a problem in order to solve it and make the product or process operational again.

Trusted Platform Module (TPM) technology is designed to provide hardware-based, security-related functions. A TPM chip is a secure crypto-processor that is designed to carry out cryptographic operations. The chip includes multiple physical security mechanisms to make it tamper-resistant, and malicious software is unable to tamper with the security functions of the TPM.

U-Z

UiPath is a robotic process automation platform for end-to-end high-scale automation. UiPath software offers solutions for enterprises to automate repetitive office tasks for rapid business transformation. It converts boring tasks into an automation process using multiple tools.

Unified endpoint management (UEM) is a class of software tools that provide a single management interface for mobile, PC and other devices. It is an evolution of (and replacement for) mobile device management (MDM) and enterprise mobility management (EMM) and client management tools. It provides capabilities for managing and securing mobile applications, content, collaboration and more. It is a single approach to managing all endpoints like smartphones, tablets, laptops, printers, ruggedized devices, Internet of Things (IoT) and wearables.

UPS CampusShip is Sunrun's centralized shipping process; it is accessed via an online portal for businesses shipping. IT Service Desk agents use the online portal to provide customers with shipping labels via email.

A **URL** is a Uniform Resource Locator, a tool used to find webpages. It is composed of a protocol, a domain, a path, and a webpage name.

Universal Serial Bus (USB) is an industry standard for short-distance digital data communications. A USB cable is a standard cable connection interface for personal computers and consumer electronics devices. USB ports allow USB devices to be connected to each other with and transfer digital data over USB cables. They can also supply electric power across the cable to devices that need it.

In the Incident Management Process (IMP), **urgency** is how quickly a resolution is required. There are three levels of urgency: high, medium, and low.

With **User Account Control (UAC)** enabled, Windows 10 or Windows 11 prompts for consent or prompts for credentials of a valid local administrator account before starting a program or task that requires a full administrator access token. This prompt ensures that no malicious software can be silently installed.

VCaaS (Video Conferencing as a Service) refers to cloud-hosted video conferencing solutions that are subscription based. VCaaS solutions are generally more affordable than room-based systems, because they don't require you to buy expensive equipment. Basic webcams and speakerphones are commonly used in place of expensive room-based systems. Veracity is Sunrun's VCaaS application in use mainly on Vivint Solar (Orange) legacy devices.

A **virtual appliance (VA)** is a virtual machine (VM) image file consisting of a pre-configured operating system (OS) environment and a single application. The purpose of a virtual appliance is to simplify delivery and operation of an application. To this end, only necessary operating system components are included. BeyondTrust Remote Support is an example of a virtual appliance (VA) used in Sunrun's Service Desk Management operations.

Virtual Desktop Infrastructure (VDI) is defined as the hosting of desktop environments on a central server. It is a form of desktop virtualization, as the specific desktop images run within virtual machines (VMs) and are delivered to end clients over a network. Those endpoints may be PCs or other devices, like tablets or thin client terminals.

A **Virtual Machine (VM)** is a compute resource that uses software instead of a physical computer to run programs and deploy apps. One or more virtual “guest” machines run on a physical “host” machine. Each virtual machine runs its own operating system and functions separately from the other VMs, even when

they are all running on the same host. This means that, for example, a virtual MacOS virtual machine can run on a physical PC.

A **virtual private network (VPN)** extends a private network across a public network and enables users to send and receive data across shared or public networks as if their computing devices were directly connected to the private network. Sunrun's VPN client is Pulse Secure.

A web browser is an application that enables end users to interact with information over the Internet. A **virtual web browser**, however, is physically or logically isolated from the underlying operating system (OS) of a computer. Virtual browsers can improve security by preventing malware infections from malicious websites and links, enable users to run browsers that are not compatible with their personal devices, enable large-scale browser compatibility testing and support additional use cases. Many users at Sunrun deploy Virtual Internet Explorer to access Oracle.

VMware Horizon is a commercial desktop and app virtualization product developed for Microsoft Windows, Linux and MacOS operating systems. VMware Horizon provides virtual desktop and app capabilities to users utilizing VMware's virtualization technology. A desktop operating system (typically Microsoft Windows) runs within a virtual machine on a hypervisor.

Voice over Internet Protocol (VoIP) is a method and group of technologies for the delivery of voice communications and multimedia sessions over Internet Protocol networks, such as the Internet. VoIP is the technology that converts your voice into a digital signal, allowing you to make a call directly from a computer, a VoIP phone, or other data-driven devices. Simply put, it's phone service delivered over the internet. You may also hear it referred to as IP telephony, internet telephony, broadband telephony, or broadband phone service.

Warehouse Management System (WMS) is a software application designed to support and optimize warehouse functionality and distribution center management. Sunrun's WMS manages all inventory for its branches and installers. Sunrun's WMS uses VLAN66 network at each warehouse site to service all Zebra scanners and printers in use. In Meraki, these devices appear as Android devices.

Within League Live, **Watt Games** is the competitive layer of Spark Academy that challenges sales representatives to learn all levels of Sunrun sales operations through a more comprehensive training approach. Watt Games includes challenges focused on sales concepts such as referrals, inside sales, Home Depot retail sales and Brightbox promotions.

Cisco **Webex Contact Center (WxCC)** is a native cloud, omni-channel platform that provides the significant advantages of cloud delivery for Sunrun's business operations. Webex took the place of Cisco's **Customer Journey Platform (CJP)**.

A **wide-area network (WAN)** is a collection of local-area networks (LANs) or other networks that communicate with one another. A WAN is essentially a network of networks, with the Internet the world's largest WAN.

Wi-Fi Protected Access Pre-Shared Key (WPA-PSK) is a system of encryption used to authenticate users on wireless local area networks. It's typically utilized by telecom companies for end user access in home local area networks. WPA-PSK may also be called **WPA2-PSK** or **WPA Personal**.

Windows 10 is the most recent version of the Microsoft Windows operating system. There have been many different versions of Windows over the years, including Windows 8 (released in 2012), Windows 7 (2009), Windows Vista (2006), and Windows XP (2001). While older versions of Windows mainly ran on desktop and laptop computers, Windows 10 is also designed to run equally well on tablets.

The **Windows Registry Editor (regedit)** is a graphical tool in the Windows operating system (OS) that allows authorized users to view the Windows registry and make changes. ... REG files or create, delete or make changes to corrupt registry keys and subkeys.

A **workaround** is a method, sometimes used temporarily, for achieving a task or goal when the usual or planned method isn't working. In information technology, a workaround is often used to overcome hardware, programming, or communication problems. Once a problem is fixed, a workaround is usually abandoned.

Workday is the platform Sunrun uses to manage our employee information. Workday makes it easy to change personal information, check your benefits or pay stub, request time off, find people in your directory, look up the organizational chart and generate reports. Your user access for many Sunrun applications are managed by your job position in Workday. For more information, visit <https://one.sunrun.com/sunrun/workday>.

Sunrun's **Workforce Management (WFM)** Team supports its Customer Care Team, Solar Advisors, Inside Sales Consultants and AEEE. They also manage employee experience elements such as new hire onboarding, schedule management, dashboard management and vendor management.

Workspace ONE & Airwatch are digital platforms that work together to deliver and manage any app on any device by integrating access control, application management and unified endpoint management. The platform enables Sunrun IT to deliver a digital workspace that includes Sunrun-specific devices and apps without sacrificing the security and control that professionals need.

WrapUp time is the time spent by a Tier 1 Service Desk agent doing after-call work (ACW) once they have concluded an interaction with a customer. When the call is over and the customer is no longer involved, WrapUp time is still considered part of the interaction, as the advisor is still working on the customer's query. It is therefore factored into Average Handling Time (AHT).

The **Xerox Device Agent (XDA)** is an app that allows for the collection of meter reads of each printer. It can be loaded on any Windows computer or server that is under continual power, and on the same network as the printers. This provides visibility to the printers you want to monitor. This app gets installed for customers using auto toner shipment services. Once it communicates with the printers, it then gathers information, such as toner levels and meters, and sends them to Xerox. Once this information is received, the internal algorithms at Xerox will determine when to automatically send supplies. This way, customers always have toner available when needed.

Zebra printers are used at Sunrun's Warehouse Management System (WMS) locations to increase employee productivity and accuracy by enabling portable printing of barcode labels, receipts and RFID tags at the point of application. Zebra also has a handheld mobile printer and accessories for a complete portable solution.

A **zipped (.zip) file** is a collection of other compressed files. A .zip takes up less storage space and can be transferred to other computers more quickly than uncompressed files. In Windows, you work with zipped files and folders in the same way that you work with uncompressed files and folders. Combine several files into a single zipped folder to more easily share a group of files. ZIP is an archive file format that supports lossless data compression. A ZIP file may contain one or more files or directories that may have been compressed. The ZIP file format permits a number of compression algorithms, though DEFLATE is the most common.

LMS Style Guide

Basic Page - LMS Module

Picture

Text with Heading (Heading - Black; Text #045097)

Tech Terms

Use the accordion below to explore important terms/acronyms introduced in this module. You'll be using these terms regularly in your daily ITSD responsibilities.

Accordion (insert text for each term)

Text with Heading (Heading - Black; Text #045097)

Knowledge Base Articles (KBAs)

Explore the KBAs below to learn policies and procedures for IAM at Sunrun.

Attachment (with links to KBAs with related information)

Video

NEW SECTION

Assessment

In-Call Recording: Title HERE

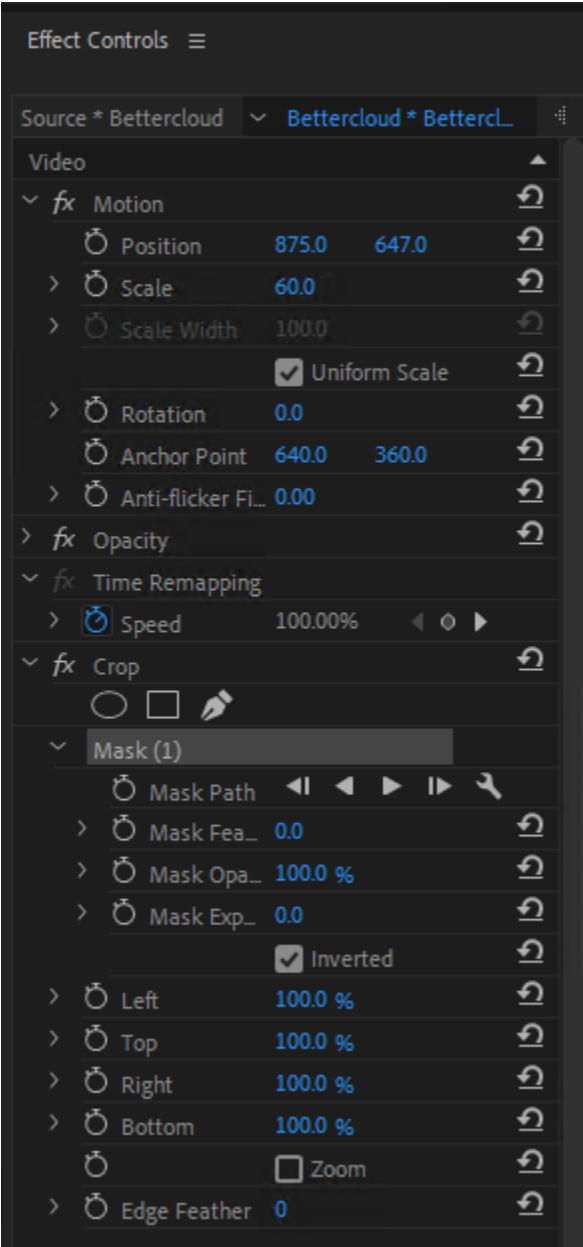
Remote users may experience their computer password falling out of sync with their SSO password. Listen to the in-call recording below to hear how Adam, a Tier 1 Service Desk Agent, provides instructions for the remote customer to sync his password. Then review the corresponding ticket to review Adam's documentation of the problem and ultimate resolution.

Video: Title HERE

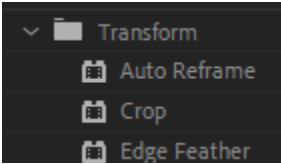
Review the video below to learn best practices for Okta account unlock, password and Multi-factor Authentication (MFA) reset.

Video Settings - Adobe Premiere Pro

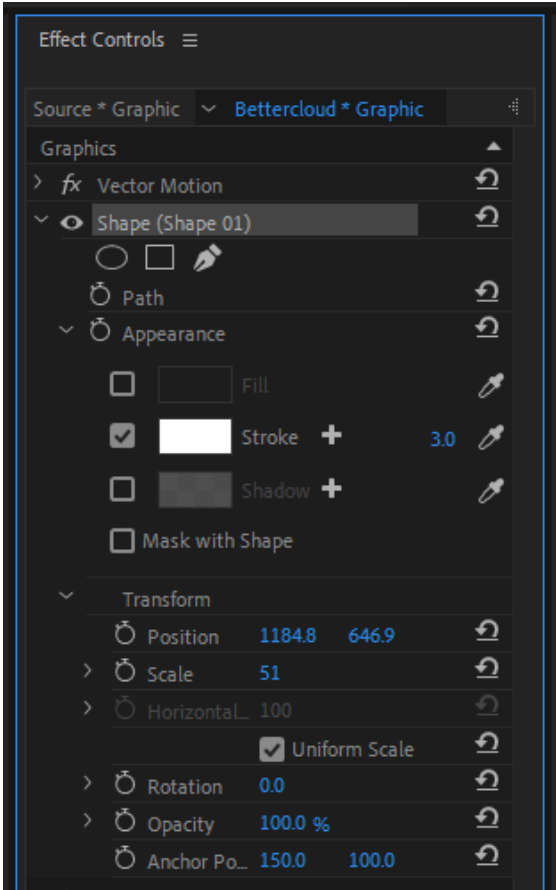
Inset Video - Facilitator



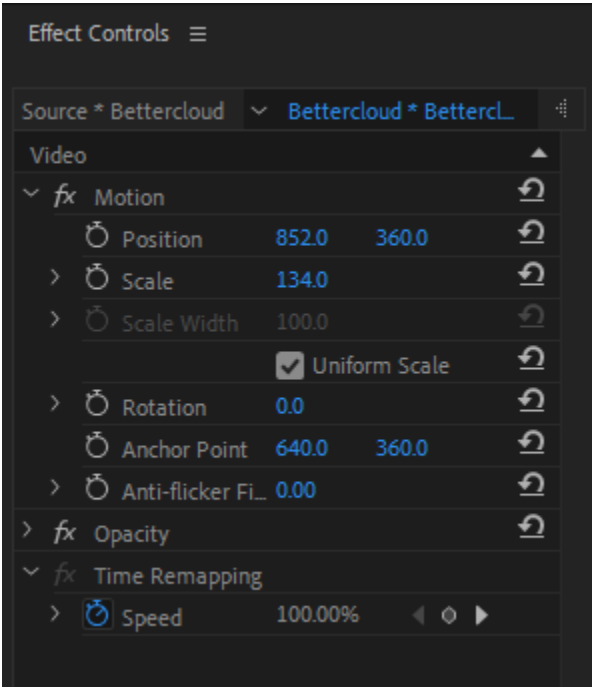
Crop Tool



Inset Video Frame - Facilitator



Main Video Display



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Notes for Next Time

- Share master list of useful bookmarks
- Provide each trainee an outline of the full training scope & sequence so they can take their own notes
- Sage - Tax Department uses this via AWS to process tax purposes
- Welcome Course
 - Module for Customer Experience - Understanding - Ownership - Resolution
 - Opening/Tone/Greeting
 - Check Sales training materials
 - Emphasize empathy (see Customer Care for resources)
 - Open with apology for wait time
 - Process/Pathway/Troubleshooting
 - Organizing screen
 - Using Knowledge Base Articles (KBA)
- Troubleshooting Workflow: Explain the difference between Customer Care & IT Service Desk
- Add LinkedIn Learning (add Okta tile) process for new trainees (KBA, perhaps?)
- Service Desk Overview Course
 - Service Level Agreements
 - Incident Management
- Add Google Chat installation link and/or instructions

From Ken Hodson:

Day 5

INC0486115 (Mysunrun app)

Service contract #>Input in salesforce>Opened template(Escalation - - Mysunrun > filled info based on Service contract #>State: In progress>Assignment group: Service desk II

INC0486100 (Blue Instance)

INC0486136 (Oracle mobile- machine application) - Waiting on user to remote in and download application

TASK0052261(google admin request)

Day 6 (Monday)

Enlighten Access Request

Master reference page to get REQ#

Enter in SNOW

First and last in Enlighten to check

If not, create one by clicking add user

CALLS

<https://na1.nice-incontact.com/player/#/cxone-player/contacts/399a5194-667a-4dac-be67-d2cdd610cac4/segments/ec01a35d-efbc-4567-a8b1-ed0739900a0a>

<https://na1.nice-incontact.com/player/#/cxone-player/contacts/6b108e3e-e190-4c1a-a490-3b861ddab484/segments/f03a2df4-ca05-4e87-8592-23f59c8dfe87>

Default admin creds

.\admin

H@ckerM@n1337

Make sure hardware REQ has INC in it that you did troubleshooting in. Create REQ in Help portal>Catalog> Order IT equipment> fill it in

Change the requested for to affected user!!!

REACHING OUT TO USERS

Day 1 Reach out to user on ticket

Day 2 Wait

Day 3 Reach out on G chat

Day 4 Wait

Day 5 Close

Looking up Bitlocker recovery key

Go to workforce one UEM> Plug in asset tag in search> Select asset > View recovery key under security> Read them the Personal Recovery key (Chat in SNOW)

Asset Tags

EX: SR-LT-xxxxxxx OR C1000xxxx

Personal printers: This can be done(downloading driver), however, please note: any personal software used can be installed however we cannot work on troubleshooting if it doesn't work with the work device, are you wanting to continue?

Under \$500

144 HZ 27" (maybe just go with 2/ 27") or a 32"

120 HZ for small one 24"

(dont worry about model)

MSI

ASUS

ACER

\$60

Lightspeed G502

Logitech (get the pad)

Salesforce Blue Instance

INC0487208

Search in Salesforce> Fill in info with salesforce escalation template

na1.nice-incontact.com

{{MetalInfoService.data.description}}

na1.nice-incontact.com

{{MetalInfoService.data.description}}

na1.nice-incontact.com

{{MetalInfoService.data.description}}

na1.nice-incontact.com

{{MetalInfoService.data.description}}



3:44

IMEI

ICC ID

Carrier or EID

Telephone is optional

FORM (Field service lightning)

INC0487294

Went to Salesforce > Looked up user in Salesforce> Drop down by follow icon> user details

3:47

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KBs

KB0012827 - Identity Verification Process

KB0010081 - How to Reactivate Windows License

KB0013000 - Windows - How to Re-Domain a PC

KB0013118 - Resolving Deactivated Salesforce Accounts

KB0013121 - SALESFORCE - Employee-Related Access Issues

KB0010392 - CRM Support - Tier 1 Sales Requests Procedure

KB0012967 - Enterprise Printer Support - Xerox and Canon

KB0012989 - Connecting ChromeBook to Printer 2021

KB0013148 - Oracle SRI - Fulfilling Access Requests

KB0013153 - Email Lists/Inbox/groups In BetterCloud- Fulfilling Access Requests

KBB0010073 - inContact - Integrated Softphone

KB0013128 - NICE inContact CXone - Contact Center Software

KB0013169 - Hardware (windows issues)

KB0013151 - Enlighten Enphase

DAY 1

Greeting:

Surun IT this Ken can I get your...

Name

Birthday

Manager name

Location

OR

Employee #

Work day syncs to Okta every 8 hours in a day.

Verification before making any changes to any account

Name

Job title

Manager ID/name

Location

Birthday

Employee ID #

KB0012827

If folks are offshore they got team leads and they change often. Reach out to team leads to set up the temp password.

Temp password is given in OKTA>Reset password>Temp password>Window will pop up>Read to user.

Check Okta for users if they don't show up, check workday and if it shows terminated there. Have them reach out to their manager.

We only manage OKTA and down

If your Okta dashboard is locked

Go to Learning portal-Use admin account

Send cert to data-security-training@sunrun.com

Access this from the data security and privacy> Achievements> Download cert

User already did that? Ok resend the email and Ill reach out to Infosec on my end as well

LOA Leave of absence

If they went on LOA ask them if they have contacted leaves@sunrun.com

User: I've already emailed them

Go into workday to check

User: I want access cause I need access for documents

Are you returning from leave? If not leaves@sunrun.com

8 hrs sync from workday to Salesforce

We can generate labels for them through the UPS tile app.

Lockout reasons on tiles in OKTA 4-8 hr sync window

Data security lockout

LOA

ET/Pre ET: Active in workday but not in Okta means to reach out to talent ops.
talentops@sunrun.com. Active in both, have Zach miller change permission.
FDE lockout

Active Directory

Ensure you are on the VPN before logging into either LAPS or AD

.\admin

LAPS password

Spice

DO NOT LOG INTO SPICE TILL START TIME OF SHIFT

Be sure to click the door before logging out of Spice

CI= Application at play

Asset tag only on hardware

SNOW

Easy access to bitlocker key look in Workspace One UEM

Lookup name> devices> View key

Dont go into Bombgar unless absolutely necessary. Only certain number of licenses.

File>Session log out> Log out

USE .\Admin - LAPS password to ELEVATE CREDs in BOMGAR

User locked out of machine Windows

Suport creds or LAPS admin password

Remote you in

Sign into pulse secure (Check version number)

Cant sign into Pulse secure ensure that they can sign into OKTA. If they cant send them
temp password, then sign into Pulse secure

Change user profile

Sign in as OKTA user

Up to date Pulse secure 9.1.14 or 9.1.15

To uninstall if it is not showing this version above, do the following

[Vpn.sunrun.com](https://vpn.sunrun.com)

Control panel- Remove all 5 items for Pulse Secure. DO NOT SAVE CONFIG ITEMS

Remove pulse from %appdata%

Remove pulse from program files

Restart machine

Reinstall Pulse secure from Google drive>Shared drives>IT service Desk>Pulse Secure installer> MSI file

DAY 2

Reactivating Windows License. We dont use licenses use this KB KB0010081

Re-Domain a PC KB0013000

Windows Certificate to access wifi

Login for UEM

Username: Sunrun\ken.hodson

Password: Not needed

SALES FORCE

Hub for customer account info

KB0013118

KB0013121

SPLAT

KB0010392

D2H OR FUSION

(385) 352-3662 or saleslicensing@sunrun.com

<https://docs.google.com/document/d/1tCvdD-2eWPSFeH8jYqEHyHjF1EHXpVDeLQ6vw7vdj34/edit>

ORACLE

Access request REQ

LOA needs an access request

Login assistance button to reset password on Oracle, wait 15 min. If it dont work set default password as seen in top image

Manager requests Access request. Not user

DAY 3

Click mobile

INC0423956

Better cloud will add delegates to the inbox

g.bettercloud/yesenia's bookmarks>Search for name in the search bar> Email tools>Delegation>create delegate>Fill it in>Check

Day 4

Nice in contact

Go to login.incontact.com> Forgot password to set up password

Supervisor in waffle of incontact

Force logout on right. Monitor>Voice Monitor, Screen monitor, voice and screen monitor. Coach.

Barge(3 way).Take over (transfer)

Spice

Make sure in campaign details that Okta attributes match Spice

Do this in Okta Admin

You can also make a ticket under new case in Start>Spice Campaign> you got 2 options, Dev and Service desk. Dev is a sandbox environment.

You can see asset tags in this location too under CI

https://vivintsolar.service-now.com/kb?sys_kb_id=10e051ad1b23c19407db975a234bcbb5&id=kb_article_view&sysparm_rank=1&sysparm_tsqueryId=4d20b9311be34954d102caa3604bcb58

ITSD announcements - Changes in the company

ITSD general - QA

general is company wide

It-help (ignore)

ITSD training - Our training channel (questions)

To CCT - Nice incontact/license keys/ Max agent

To hardware - Hardware issues BE SURE YOU TROUBLESHOOT AND POST WHAT YOU DID PRIOR

Expectations

By May 23rd - 27th

May 30th (calls on your own)

June 6th - August 8th On your own by August 8th you should be completely self sufficient

Touch 2-5 tickets a day that are self service assigned (15 min prior to lunch and EOD MAKE SURE TO ASK IN ITSD GENERAL)

WATCH QUEUE IF IT IS OVER 10 CALLS OR 10 MIN WHICHEVER COMES FIRST.

KEEP A TAB OPEN FOR THE QUEUE

Spikes happen at 3,4 & 5

Printers

KB0012967

Password: Copier

Chrome books to printer server

KB0012989

Enrollment Links

[IT Service Delivery Training: Course 1 - Welcome & Introduction](#)

[IT Service Delivery Training: Course 2 - Service Delivery Fundamentals](#)

[IT Service Delivery Training: Course 3 - Identity & Access Management \(IAM\)](#)

[IT Service Delivery Training: Course 4 - Environment Infrastructure](#)

[IT Service Delivery Training: Course 5 - Policies & Procedures](#)

[IT Service Delivery Training: Course 6 - Applications & Services](#)

[IT Service Delivery Training: Course 7 - Hardware](#)

[IT Service Delivery Training: Course 8 - Productivity Suite](#)