

Smarter technology for all

Next Generation Service Portal (NGSP)

Post-Live training guide v.9

NA Warranty Channels Operations Team – July 2025

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What is NGSP?

NGSP stands for Next Generation Service Portal

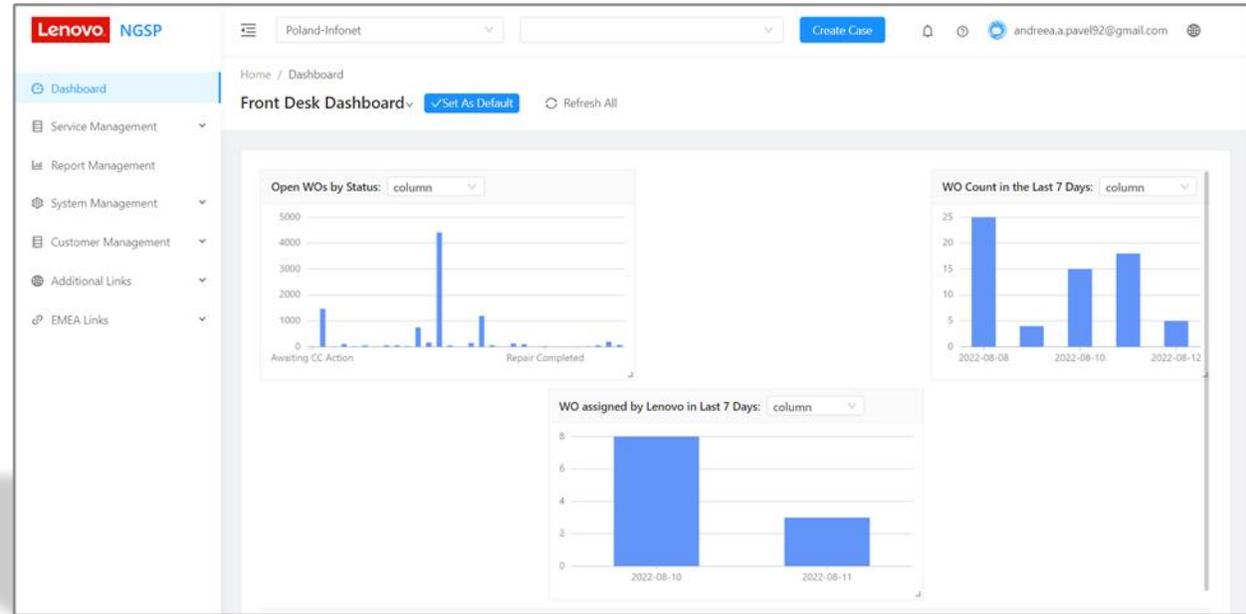
URL: ngsp.lenovo.com

📌 Google Chrome is the preferred browser.

The records you are going to work with the most are **Cases and Work Orders**.

A **Case** is made up from the **unit's information** along with the **customer's information**.

In the **Work Orders** you will be able to **document repairs, order parts, and, if applicable, claim labor reimbursement**.



Each Work Order originates from a Case, and every active Case leads to the creation of a Work Order

📌 If you work for multiple locations, make sure to select the correct one before starting your orders

NGSP at a glance

Each page is divided into various sections.

Each section has fields for you to read, select or enter data.

The screenshot displays the NGSP interface with several sections highlighted by blue bars and arrows pointing to a central 'Sections' label. The sections include:

- Initial Diagnostics** (top blue bar)
- KEY DATES** (Actual Committed Order Date)
- PRODUCT INITIAL CONDITION** (Used Lenovo Diagnostic Code, Screening Diagnostic Code, Service Delivery Instructions)
- PD Code** (View PD Guide, Enter PD code and pres...)
- IRIS Code** (Add IRIS Code)
- Service Level Information** (bottom blue bar)

Fields within these sections include: Diagnostic Reason, Diagnostic Notes, Unit Condition, Actual Service Type, Actual Shipping Method, Actual Service Level, Actual Shipping Model, Actual Service Hour, Preferred Time, and Accidental Damage Protection.

Results

Texts in **blue** are hyperlinks or currently selected options

A simple rectangular text input field with a small edit icon in the bottom right corner.

Free text field: Supports multiple lines. You can enter uppercase and lowercase letters, numbers, and commonly used special characters. **Emojis are not supported and should not be used.**

* Serial Number:

A rectangular text input field with a red asterisk to its left, indicating it is a mandatory field.

Red asterisk: mandatory field

A blue-bordered button with a white background and a downward-pointing arrow, used to open a drop-down menu.

Down arrow: open drop-down menu

A blue-bordered button with a white background and an upward-pointing arrow, used to collapse a drop-down menu.

Up arrow: collapse drop-down menu

A slider control with a blue background and the word 'Yes' to its left.

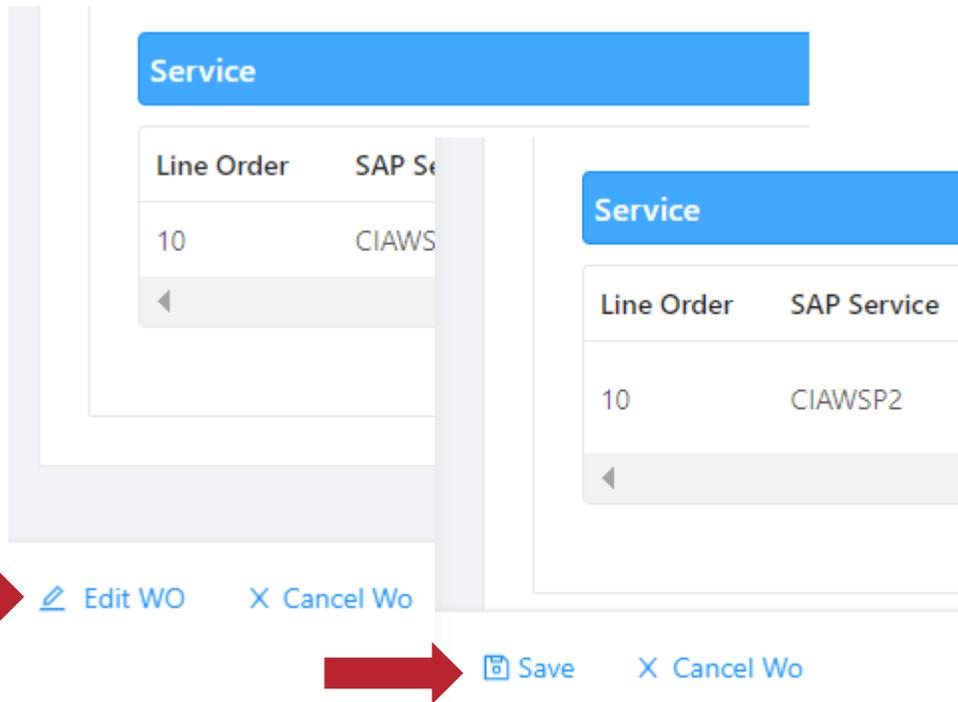
Yes/No slider: click to change

A slider control with a grey background and the word 'No' to its left.

A small, empty square checkbox.

Checkbox: Click to select, click a second time to clear

NGSP at a glance



Once a Work Order has been created, you can edit it by clicking on **Edit WO** in the lower-left corner.

Make sure to save your changes by clicking the **Save** button, located in the same spot.

i Once you click **Edit WO**, the Work Order is locked for editing by others. Clicking **Save** does not unlock it—you must exit the Work Order to release the lock.

Records cannot be edited by multiple users at the same time

i Please avoid keeping a record open longer than necessary



NGSP - Business Role Hierarchy and Contacts

LSCRM (current) Portal Access	NGSP Portal Access	Create ASP Admin User	Create ASP Admin L2 User	Create ASP Technician User	Create Contacts	Create Cases & Work Orders	Maintain User Access & Status	Report Access
Service Manager	ASP Admin	*SMSC / NASPS Team	Yes	Yes	Yes	Yes	Yes	Yes
Profile Administrator	ASP Admin L2	ASP Admin	No	Yes	Yes	Yes	Yes	Yes
Claim Administrator	ASP Technician	No	No	No	No	Yes	No	Yes
Service Technician**	No	No	No	No	No	No	No	No

ⓘ Users have access to NGSP, Contacts DO NOT have access to NGSP

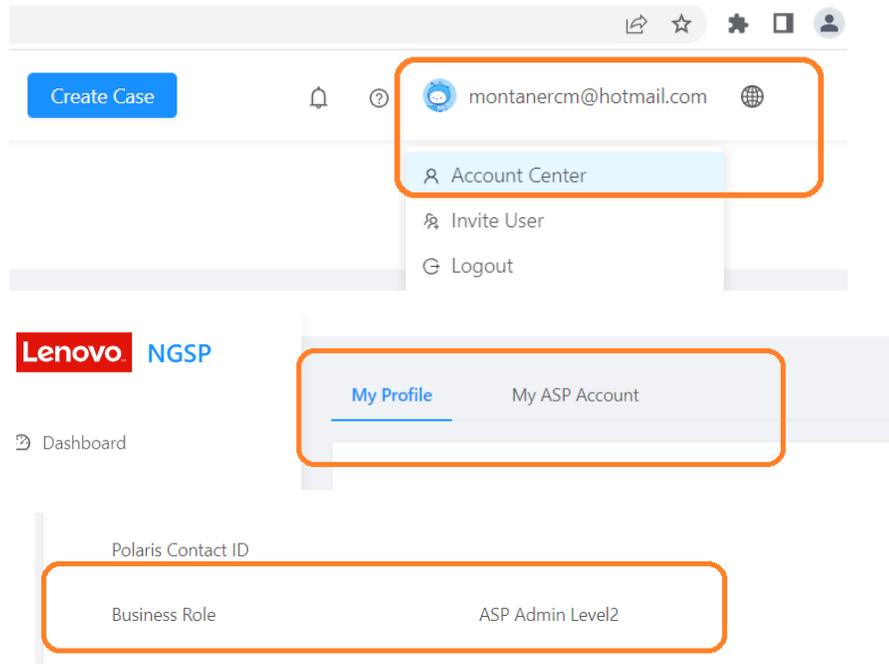
*SMSC – Support Management Team / NASPS – NA Operations Team

**Service Technicians are created as Contacts and not assigned a Business role. They do not have access to NGSP

NGSP – Access Level & Business role

Viewing Your Business Role and Access Level

Hover over your email address in the upper right-hand corner to open a drop-down menu. Click on **Account Center** to access the **My Profile** screen, where all your personal information is displayed. At the bottom, under **Business Role**, you can view your access level.



Available Business roles

- **ASP Admin – Invitations to register as an ASP Admin are sent by Lenovo.** ASP Admins can invite ASP Admin L2s and ASP Technicians, create Account Contacts, open cases, and create or edit Work Orders.
- **ASP Admin L2 -** This user can invite new ASP Technicians, create Account Contacts, open cases, and create or edit Work Orders.
- **ASP technician -** This user cannot invite other users or create Account Contacts. They can open cases, and create or edit Work Orders

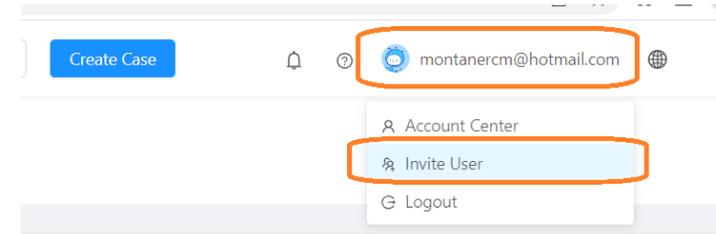
i Any ASP technician user can be picked as a “repair” Service Technician in your Work Order.

i All ASP Technicians (users) are also Service Technicians (contacts), but not all Service Technicians (contacts) are ASP Technicians (users).

NGSP – System Management - Invite users

How to Invite users

Hover over your email address in the upper right-hand corner to open a drop-down menu. There, you will see the option to **Invite User**.

A screenshot of the 'Invite User' form. The form is titled 'Invite User' and has a close button (X) in the top right corner. It contains three required fields, each marked with an asterisk: 'Email / NGSP user login name:', 'Loc.ID the user will working for:', and 'System Role:'. The 'System Role' dropdown menu is open, showing 'ASP Technician' as the selected option. A blue button labeled 'Send Invitation Email' is located at the bottom right of the form. The entire form is outlined with an orange border.

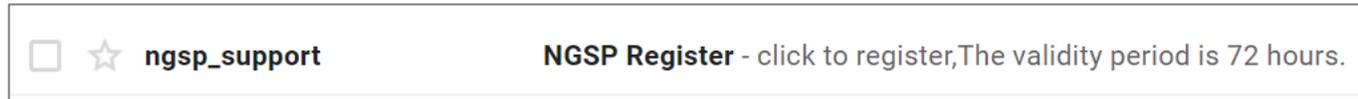
Enter the email address (this will be the invitee's username), the location(s) that the user will be associated to, and the system (Business) role by clicking on the drop-down list.

- ❗ This function is only available for ASP Admins and ASP Admin L2.
- ❗ You can choose only ONE Business Role per user.
- ❗ **New users must be authorized by Lenovo. After receiving an invitation, they are required to complete the necessary training in Lenovo Learning and notify the SMSC to have their account activated.**

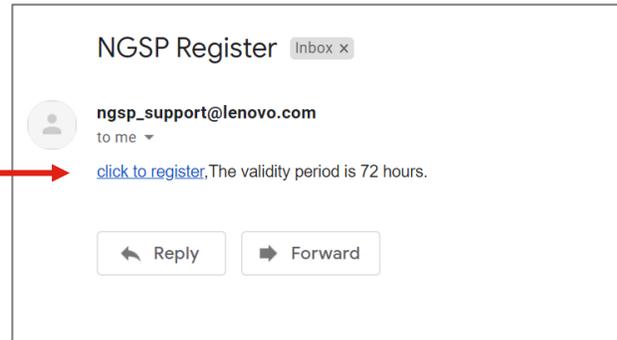
NGSP – User Registration (after user has been invited)

User registration

The invitee will receive an email with a registration link to the **NGSP** system. The registration form must be completed within 72 hours.



Open the email and click on the link



ⓘ Make sure to log in to NGSP to complete your registration. If you don't log in, your user account will not be created.

After completing the registration form (see the next slide for an example), you'll be redirected to a screen prompting you to **reset your password**.

Create your password by following the on-screen instructions, then click **Next**.

When the **success message** appears, click **Next** again to continue.

A 'Reset your password' screen with a 'Lenovo' logo on the right. It has a 'New password' field with instructions: 'Password must include: 8-20 characters, Upper or lower case letters, Numbers, Special characters (!, \$, %, ...)'. Below it is a 'Confirm password' field. At the bottom are 'Cancel' and 'Next' buttons.A 'Your password is changed' screen with a 'Lenovo' logo on the right. It says 'All Done!' and 'Click 'Next' to continue.' At the bottom is a 'Next' button.

NGSP – User registration form (Example)

On the User Registration page, all fields marked with a red asterisk (*) are mandatory. Once completed, click **Save**.

You may use your business address for this registration.

i If the system finds an existing record that matches your information, it will prompt you to confirm it. If the record is not yours, simply continue filling out the form with the correct details.

i Once a user is invited, their status will be **"Waiting for Authorization"**. New users must complete the following exams: CPRW168, CPRW169, CPRW161, RWST106 and RWSW239. After completing these, they should contact the SMSC to request authorization to create Cases and Work Orders.

User registration page

Personal Identical Information

User Name(Lenovo ID): Email Addr:

* First Name: * Last Name:

* Mobile Phone:

* Country: * City:

* Address,Street line1: * Zip Code:

Street line2:

Street line3:

* Time Zone:

Cross System ID mapping

My Roles

- ASP Technician

My associated Loc.ID

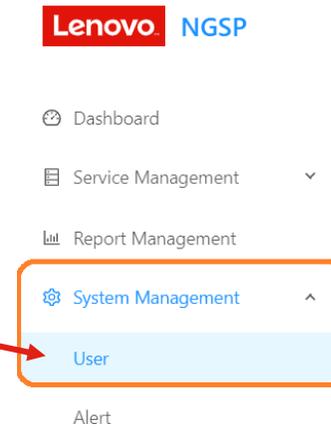
Station ID(Polarise Team)	Station Name
1210404411	Poland-Biasc Sp. z o.o.-Biasc Sp. z o.o.
1210180578	United States-PC CONNECTION INC- PSPD Connection US
121134567	Poland-Dummy NGSP Test Team_2-null

Save

NGSP – System Management - Manage users

How to manage users

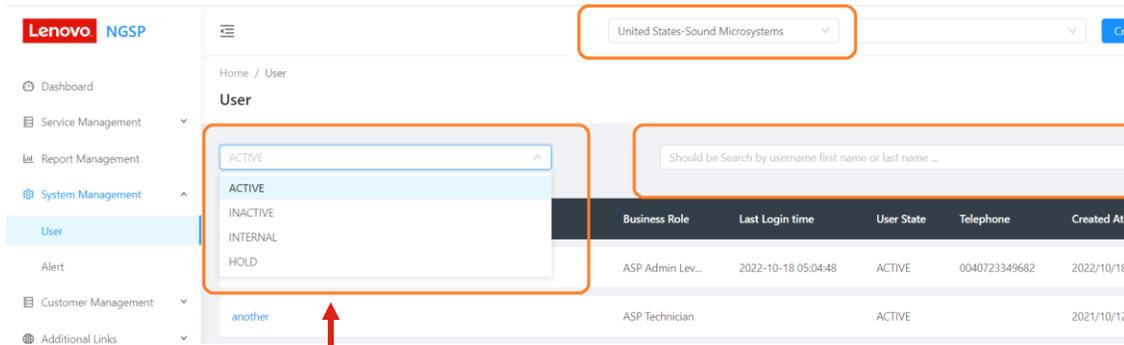
Only users with the **ASP Admin** or **ASP Admin L2** roles can view the **System Management** section in the left-hand menu.



Click on **User** to see the full list of users associated to your location(s).

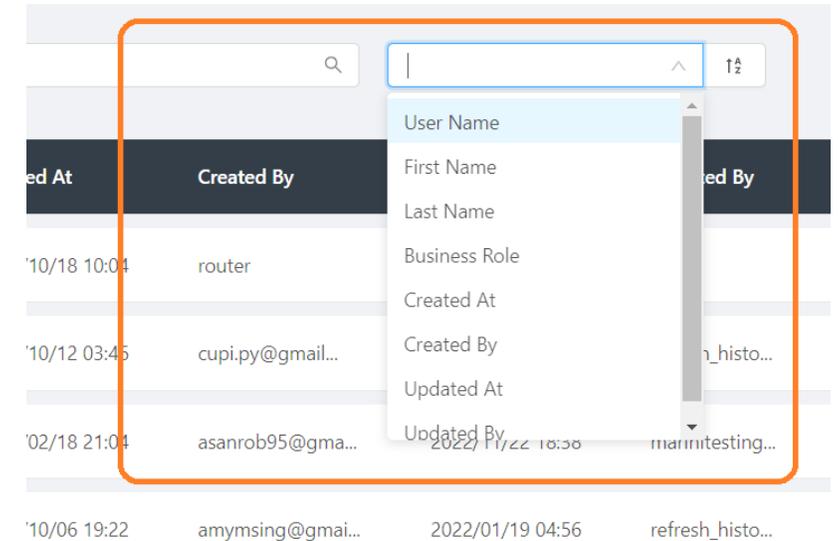
ⓘ If you are associated with multiple Location IDs, **make sure to switch to the correct one if it's not already selected.**

You can change your Lookup criteria by choosing from the dropdown list.



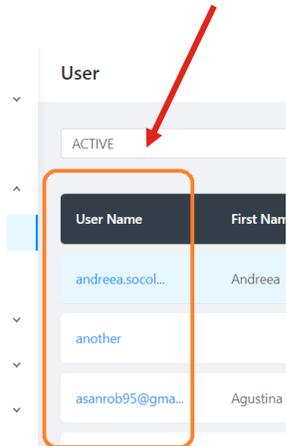
You can filter your Users by status.

You can search users by name



NGSP – System Management - Manage users

- Click on the **user** that you wish to see.



A new window with two tabs will popup:

- Summary** which contains user data and status.
- Location ID** with the location(s) associated to the user.

If you need to change any of the information included in these tabs, click on **Edit** and then **Save**.

andreea.socol92@gmail.com
ASP Admin Level2

ACTIVE
User State

Summary Location ID

Details

User Name:	andreea.socol92@gmail.com	* House No:	34
Polaris Contact ID:	8029407572	* Street1:	Ispirescu
* First Name:	Andreea	Street2:	-
* Last Name:	Pavel	Street2:	-
* Telephone:	40 0040723349682	* City:	Bucharest
* E-mail:	andreea.socol92@gmail.com	* Country:	RO
* Time Zone:	(GMT+02:00) Athens, Bucharest	* Postal Code:	5054039
* User State:	ACTIVE	State/Province:	
* Business Role:	ASPAdminLevel2		

Address

Admin

Cancel Edit

andreea.socol92@gmail.com
ASP Admin Level2

Summary Location ID

Location ID	Location Name
30010681	KMD Singapore (ASP)
30011440	CCIABL01LK
1210181008	Sound Microsystems
1210110954	Infonet-do not use
1210258922	eo Networks S.A.
1210400393	JBサービス株式会社
1210404411	Blasc Sp. z o.o.

NGSP – System Management – User status

❗ Users cannot modify their own access or status, nor can they edit the status of users at a higher level. (see slide 6 for business role hierarchy).

Available user statuses:

- **On Hold:** Users will be able to log in and view data, but they won't be able to create cases or create/edit Work Orders. An Admin user will need to reactivate them. If an ASP Admin user is On Hold, they will have to contact the SMSC for further assistance.
- **Active:** The user can perform task as permitted by their Business Role.
- **Inactive:** This is a permanent status. Once a user is inactivated, they can no longer log in and **cannot be reactivated**. If the user returns, a new email address will be required.

The screenshot shows a user management form with the following fields and values:

- Time Zone: (GMT+02:00) Athens, Bucharest
- Postal Code: 0004039
- State/Province: (empty dropdown)
- User State: (dropdown menu open showing options: ACTIVE, HOLD, INACTIVE)
- Business Role: Admin
- Created At: 2022-10-18 05:04:49
- Created By: router
- Last Login Time: 2023-01-17 10:08:54

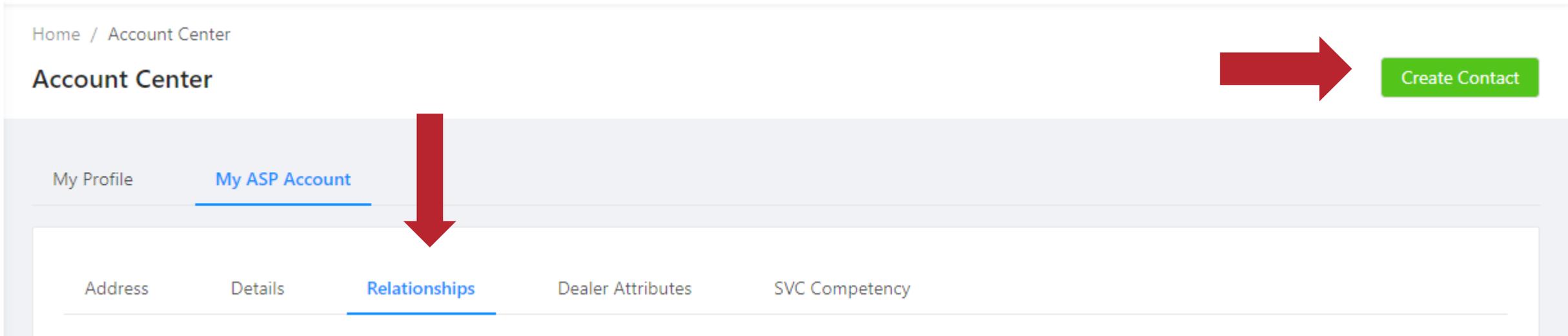
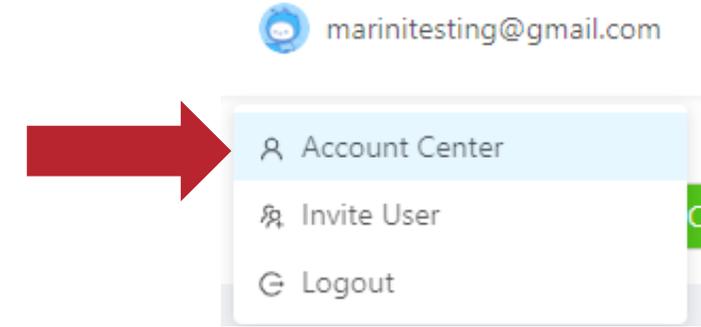
Buttons: Cancel, Save

❗ Users who have not logged in in 90 days will be put on hold automatically.

❗ Every 30 days, the system will prompt you to enter an authentication code during login. The code will be sent to your email address.

NGSP – System Management - Contact Creation (no user access)

To create a contact without User Access to NGSP, hover over your email address, go to [Account Center](#) > [Relationships](#), and click on [Create Contact](#).



NGSP – System Management - Contact Creation (no user access)

Fill in the form that pops-up and click on **OK**.

i Reminder: all fields with an asterisk (*) are mandatory.

Fields in the form:

- * First Name
- * Last Name
- Contact ID
- House No.
- * Mobile Phone
- * Email
- * Street1
- Street2
- * Country
- * Region
- * City
- * Postal Code
- * Relationship Type
- * Location ID

All your contacts will be listed here. 

To find a specific contact, enter the **Name, Last Name**, or **Relationship Type**, then click **Search**.

Afterward, a "**Create Success**" message will appear.

Account Center

My Profile **My ASP Account**

Address Details **Relationships** Dealer Attributes SVC Competency

First Name: Last Name: Relationship Type:

Export **Search** Clear All

First Name	Last Name	Training	Relationship Type	Region	Country	Created On	Action
1	2		Contact Person	Washington	United States	2022-08-09 05:43:01	...
Pavel	Pavel		Dealer Service Technician	AF-000	Afghanistan	2022-09-26 21:37:52	...
duwn43	sdfsdfsd		Contact Person	Banskobystrický kraj	Slovakia	2022-09-30 03:14:26	...
adsad	ddsda		Contact Person	Washington	United States	2022-09-05 02:11:19	...
ddds	sdfsdfsd		Contact Person	Washington	United States	2022-09-09 01:33:18	...

i You can also click on **Export** to download an excel file containing the list of contacts.

NGSP – System Management – adding a relationship to an existing contact

- To add a relationship to an existing contact, go to [Account Center > Relationship Management](#), copy the [Contact ID](#) that you wish to update and click on [Create Contact](#).

Account Center

My Profile My ASP Account Relationship Management

First Name: Last Name: Relationship Type: Location ID: Export Search Clear All

First Name	Last Name	Relationship Type	Contact ID	Location ID	Region	Country	Created On	Action
Jacqueline	Dollinger	Dealer Service Manager	8029371022	1210181008		United States	2022-05-25 10:54:44	...
James	Bond	Dealer Service Manager	8029467269	1210181008	Mississippi	United States	2023-01-13 07:56:42	...
Jamie	Oliver	Dealer Service Technician	8029452			United States	2022-11-11 07:36:16	...
Jazmin1	Price	Dealer Service Technician	8029468			Canada	2023-02-10 14:53:25	...
Jazmin1	Price	Claim Admin	8029468			Canada	2023-02-10 14:53:25	...

NGSP – System Management – adding a relationship to an existing contact (continue)

- A pop-up screen will appear. Paste the contact ID into the **Contact ID** field and click **OK**. The contact's information will then populate.
- Select the **Relationship Type**, and the **Location**.
- Click on **OK**.

The screenshot shows a 'Create' form with the following fields and sections:

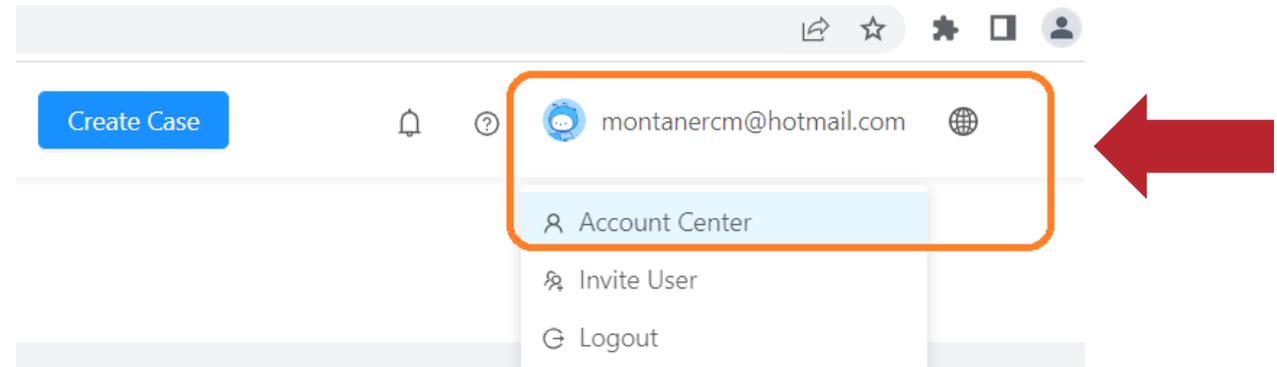
- Contact ID:** 8029468574
- First Name:** Jazmin1
- Last Name:** Price
- House No.:**
- Mobile Phone:** +121321321421
- Email:** jpr14041@outlook.com
- Street1:** MacKenzie Ave
- Street2:**
- Country:** Canada
- Region:** Alberta
- City:** Fort Chipewyan
- Postal Code:** TOP 1B0
- Relationship Type:** Dealer Service Technician
- Location ID:** NA-US, NA-CA

Red arrows indicate the following steps:

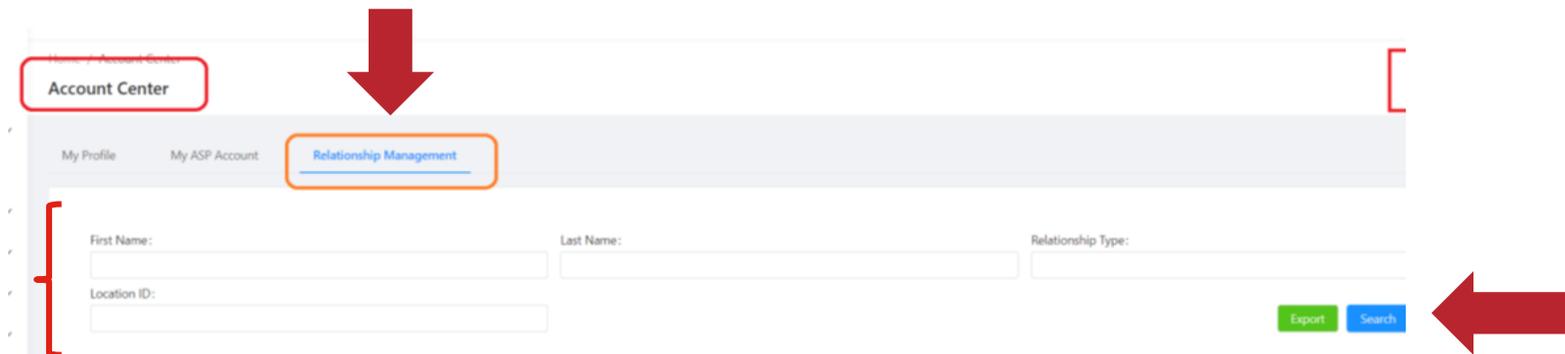
- Point to the **Contact ID** field.
- Point to the **Relationship Type** dropdown menu.
- Point to the **Location ID** section.
- Point to the **OK** button.

NGSP – System Management – deleting a relationship to an existing contact

Go to [Account Center](#) by clicking on your email address in the top-right corner of the page.



Once the [Account Center](#) page opens, click on [Relationship Management](#).
Find the contact needed by entering the name and last name and click on [Search](#).



NGSP – System Management – deleting a relationship to an existing contact – (continue)

Find the relationship you want to delete, hover over the [ellipsis icon](#), and click [Delete](#). Repeat this process for any additional relationships you wish to remove.

United States-Lenovo Warranty Channel

Create Case

marinitesting@gmail.com

Home / Account Center

Account Center [Create Contact](#)

My Profile My ASP Account Relationship Management

First Name: Last Name: Relationship Type:

Location ID:

[Export](#) [Search](#) [Clear All](#)

First Name	Last Name	Relationship Type	Contact ID	Location ID	State/Province	Country/Region	Created On	
1	1	Dealer Service Manager	8029455660	1210100204	Arizona	Algeria	2022-11-18 02:53:41	...
1	1	Claim Admin	8029455660	1210100204	Arizona	Algeria	2022-11-18 02:53:41	...
123	11	Dealer Service Technician	8029489286	1210181008,1210204781,1...	Northern Territory	Australia	2024-01-24 04:33:11	...

NGSP – Mandatory training for Users & Contacts

- **Users** (administrative roles) – Users have access to the Service Portal and can create Cases and Work Orders.
 - ❖ ASP Admin
 - ❖ ASP Admin Level 2
 - ❖ ASP Technician**

** If the ASP Technician will also service machines, they must complete the **Technician Certification Exam – RWST217 (RASERVICE)**.

Mandatory courses for administrative roles

- ✓ **RWST106 - Lenovo Service Support Guide** confirms that you have reviewed and understood the Lenovo Service Support Guide (SSG). The SSG is intended for Lenovo Authorized Self-Maintainers in the US and Canada.
- ✓ **CPRW161 - Administrative information and functions** – Basic administrative information and functions of the Self-Maintainer program. Provides a common knowledge foundation required for all other administrative training.
- ✓ **RWSW239** – Accidental Damage Protection.
- ✓ **CPRW168 - NGSP Service portal / Cases – Exam** – covers the following courses
 - NGSP Intro & Basic Navigation (CPRW151)
 - NGSP – Cases (CPRW152)
 - NGSP – PD Features (CPRW153)
 - NGSP AWSP Bath Uploads (CPRW155)
- ✓ **CPRW169 – NGSP Service portal / Work Orders – Exam** – covers the following courses
 - Next Generation Service Portal Security and Access (CPRW156)
 - NGSP – Work Orders (CPRW158)
 - NGSP- Service Management Entities (CPRW162)
 - NGSP- Reports and Dashboards (CPRW164)
 - NGSP- DOA Work Orders (CPRW165)

NGSP – Mandatory training for Users & Contacts (continue)

- **Contacts** – DO NOT have access to the Service Portal. They are created to be selected as the Technician responsible for fixing the machine when creating a Work Order.

Mandatory training for Service Technician

- ✓ **RWST106 - Lenovo Service Support Guide** confirms that you have reviewed and understood the Lenovo Service Support Guide (SSG). The SSG is intended for Lenovo Authorized Self-Maintainers in the US and Canada.
- ✓ **CSWi21Yr2 – Lenovo Diagnostics**
- ✓ **RWSW206r3 – System Board Service**
- ✓ **RWSW239 – Accidental Damage Protection**
- ✓ **RWST217 – (Exam RASERVICE) Technician Certification** – It is a **mandatory exam** for all technicians. Technicians may choose to complete all, some, or none of the recommended modules (listed below) before taking the exam.

i It is recommended that all technicians are CompTIA A+ certified. A+ is an industry standard certification program.

NA AWSPs Curriculum for Technicians Only (USEFUL CONTENT)

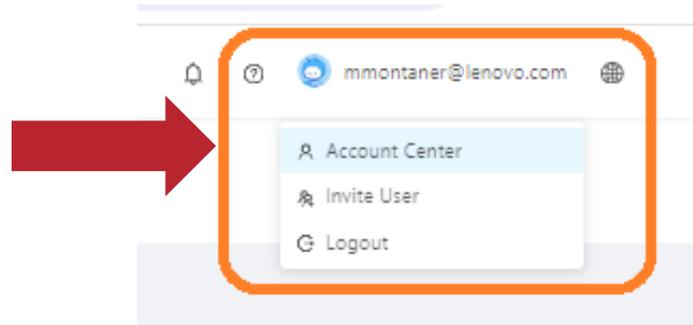
- **RWSW227** – The Lenovo Story (12 minutes)
- **RWSW228** – Lenovo Customer Service for Service Technicians (30 minutes)
- **RWSW105r2** – Lenovo Customer Experience for Servicers (45 minutes)
- **CPSW319** – Handling Difficult Customers (30 minutes)
- **RWSW221** – Lenovo Commercial Portfolio (45 minutes)
- **RWSW223** – Lenovo Consumer Portfolio (45 minutes)
- **RWSW224** – Lenovo AR/VR Smart Collaboration & IoT Solutions Portfolio (45 minutes)
- **RWSW225** – Lenovo Gaming Portfolio (30 minutes)
- **RWSW222** – Lenovo SMB & Education Portfolio (30 minutes)
- **RWSW237** – Lenovo Commercial Accessories Portfolio (45 minutes)
- **RWSW238** – Lenovo Consumer Accessories Portfolio (45 minutes)
- **RWSW229** – Lenovo Service (30 minutes)
- **RWSW232** – Lenovo Resources (30 minutes)
- **RWSV210r2** – Service Technicians Best Practices (90 minutes)
- **CARW230** – Troubleshooting: Scientific Method (10 minutes)
- **CARW231** – Troubleshooting: Lenovo Method (25 minutes)
- **RWSW207r2** – Operating System Recovery (15 minutes)
- **RTPW11E0r2** – Lenovo Chromebook Service – RMA SHIM (60 minutes) ***
- **RWSW234** – Bootbox Diagnostics and Resolute (30 minutes)
- **CSWW209** – Windows BitLocker (30 minutes)

Highly Recommended ***

NGSP – Mandatory training for Users & Contacts (continue)

How to know if a technician is qualified

To confirm if a Technician is qualified, hover over your email address and click on Account Center.



Within Relationship Management you will find a list with all your location's contacts.

Account Center

My Profile My ASP Account **Relationship Management**

Enter data to narrow down your search

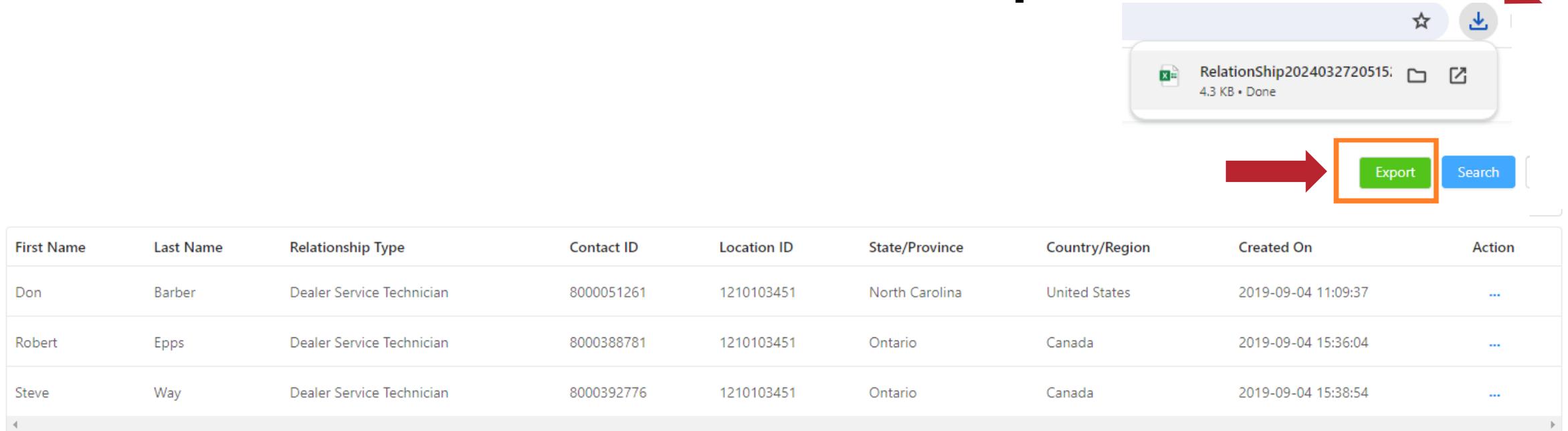
First Name: Last Name: Relationship Type:

Location ID:

- ❗ If you enter any information in these fields, click on [Search](#) to narrow down your search.
- ❗ If you manage various locations, make sure to filter by LOCID to see the contacts associated to a specific location.

NGSP – Mandatory training for Users & Contacts (continue)

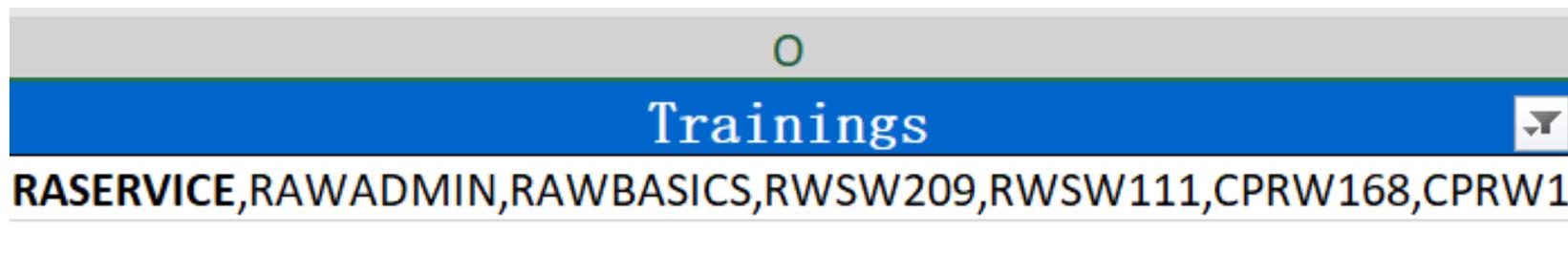
How to know if a technician is qualified



The screenshot shows a web application interface. At the top right, there is a download icon (a blue square with a white arrow pointing down) and a star icon. Below this, a notification bar shows a file named 'Relationship2024032720515:' with a size of 4.3 KB and a 'Done' status. Below the notification bar, there is a red arrow pointing to a green 'Export' button, which is also highlighted with an orange border. To the right of the 'Export' button is a blue 'Search' button. Below these buttons is a table with the following columns: First Name, Last Name, Relationship Type, Contact ID, Location ID, State/Province, Country/Region, Created On, and Action. The table contains three rows of data:

First Name	Last Name	Relationship Type	Contact ID	Location ID	State/Province	Country/Region	Created On	Action
Don	Barber	Dealer Service Technician	8000051261	1210103451	North Carolina	United States	2019-09-04 11:09:37	...
Robert	Epps	Dealer Service Technician	8000388781	1210103451	Ontario	Canada	2019-09-04 15:36:04	...
Steve	Way	Dealer Service Technician	8000392776	1210103451	Ontario	Canada	2019-09-04 15:38:54	...

The best way to check qualifications is by clicking **Export**. Once the Excel file is downloaded, open it and go to Column O – Trainings. If the course **RASERVICE** is listed, **the technician is qualified to repair in-warranty machines.**

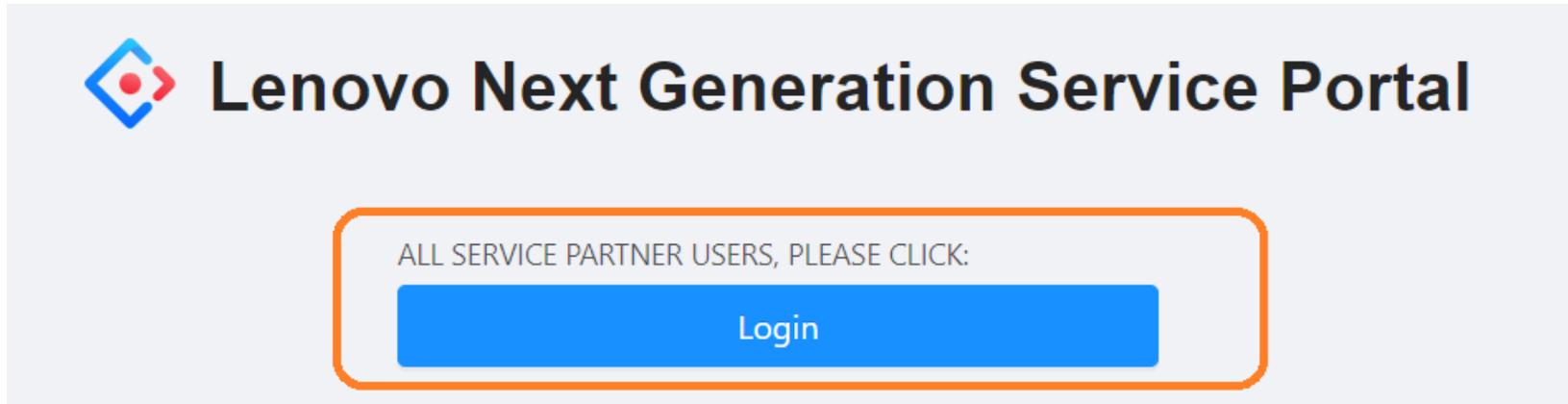


The screenshot shows an Excel spreadsheet. The column header for column O is 'Trainings'. Below the header, the following course codes are listed: RASERVICE, RAWADMIN, RAWBASICS, RWSW209, RWSW111, CPRW168, CPRW1

NGSP – Login

Once you complete your registration and click on **Save** you will be redirected to the **NGSP's login screen**. Alternatively, you can access it directly at ngsp.lenovo.com.

Click on **Login** for **All Service Partner Users**.



ⓘ Your user is the email account used to register.

ⓘ When logging in for the first time, you will have a view only access. If you try to make any changes, you may receive an error message like the one shown below. To gain full access, please contact smc@lenovo.com to request authorization for your user. Keep in mind that authorization depends on the completion of all mandatory courses.



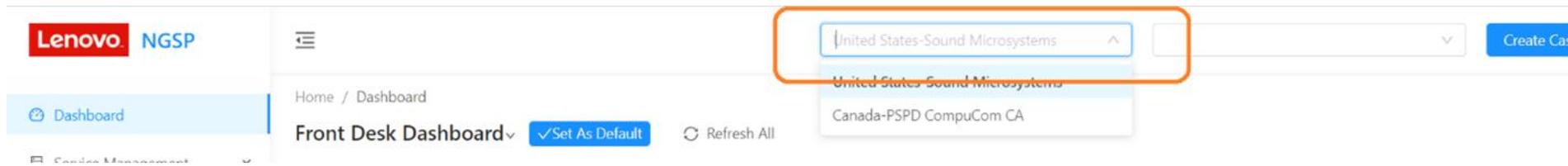
✖
Your account is waiting for authorization, please contact your Lenovo Rep to activate your account.

NGSP – Select location

Select your Location

If you are associated with only one location, it will appear at the top of the page. If you're associated with multiple locations, they will be listed in a drop-down menu. You can also search by typing your location's name or ID (LOCID) and then select the correct one.

ⓘ It is important to select the right location before you start creating a case.



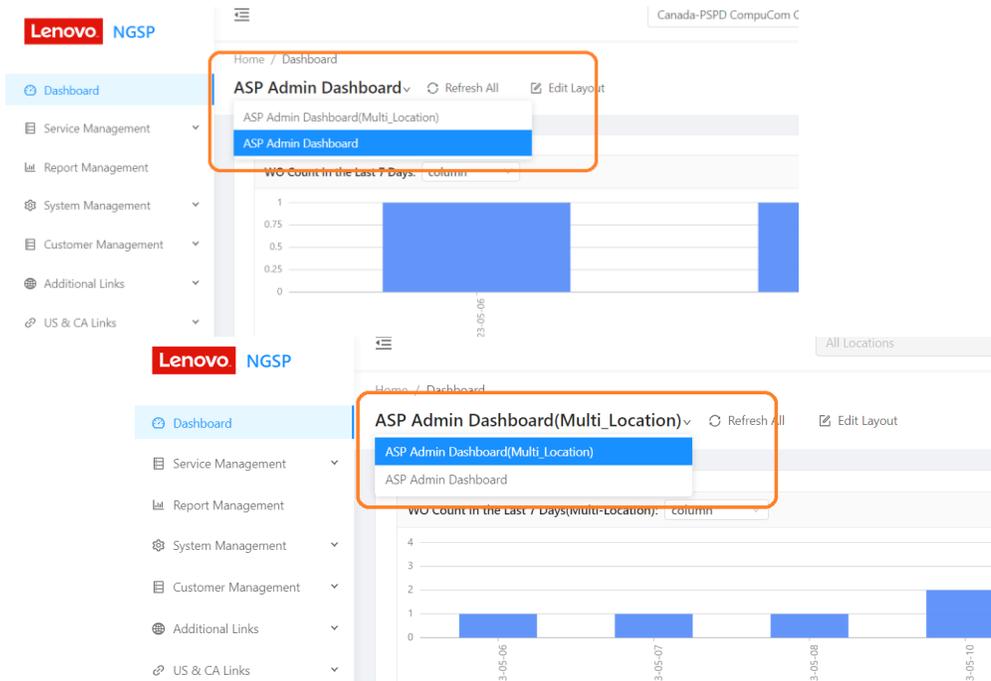
ⓘ If you are associated with multiple Location IDs, the system will remember your last session and display the information for the Location you last selected when you log in again.

NGSP – Dashboard

Your landing page will vary based on your user role, showing a different dashboard accordingly.

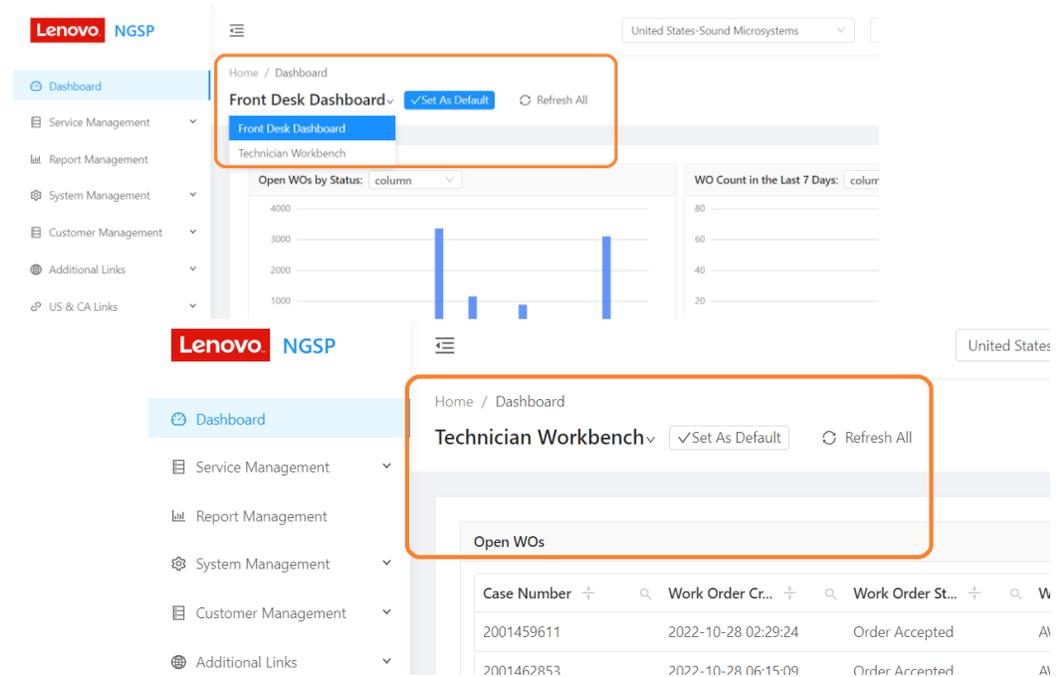
For ASP Admin & ASP Admin Level 2

- ASP Admin Dashboard
- ASP Admin Dashboard (Multi-Location)



For ASP Technicians

- Front Desk Dashboard
- Technician Workbench (defaulted)

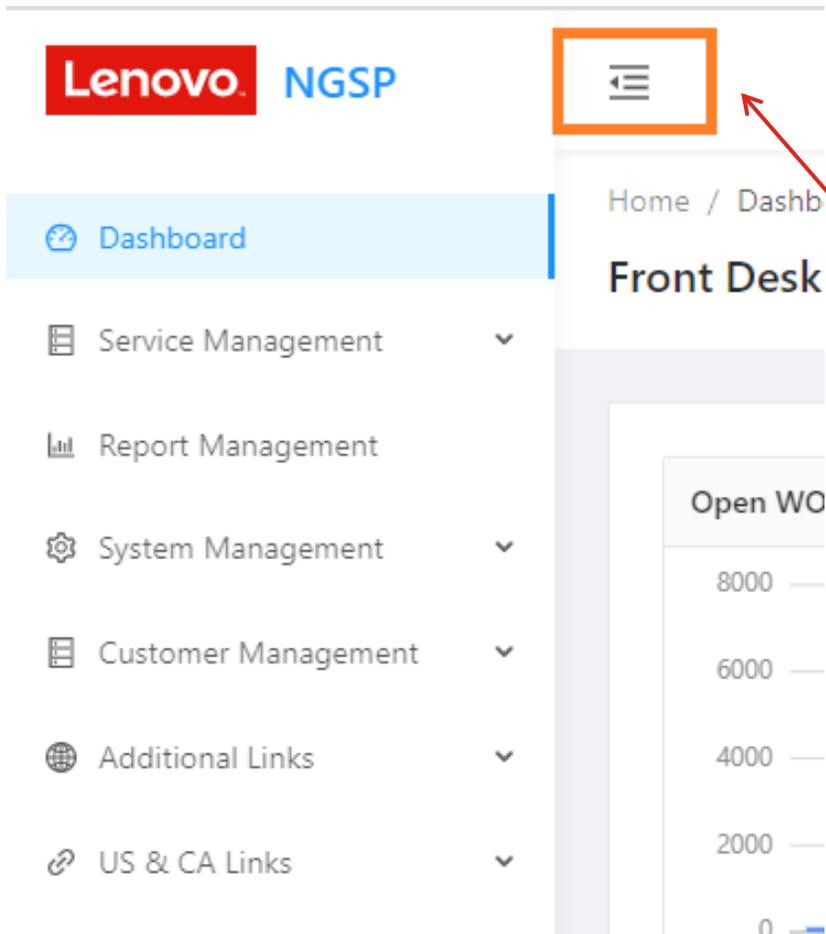


❗ You may change your view to see one or several locations at a time (if applicable).

❗ You may change your default landing page by clicking on **Set as Default** for your preferred dashboard.

❗ **To view more detailed reports go to the Report Management section**

NGSP – Navigation Menu



The **Navigation Menu** appears along the left side of every page.

By default, the menu sections are collapsed.

i Some sub-options in the menu are only visible to users with ASP Admin roles.

You can collapse this Menu by clicking on this icon.

NGSP – Search function and Notification Icon

To help you narrow down your search, the **Search Bar** offers **filters**

You can search by:

- Case number
- Work Order number
- Exact or Partial Serial Number.

If there are multiple search results, the system will display the 5 most recent ones.

Home / Case

Case

Case Number: Serial Number:

Filters Search Clear All

Home / Work Order

Work Order

Work Order Number: Case Number: Serial Number:

Work Order Status:

Filters Search Clear All

Canada-Warranty Channels

Create Case

1

marinitesting@gmail.com

If you see a **red circle** with a number on the Notification Icon, it indicates how many unread notifications you have. **Clicking the icon** will display your notifications, with the newest ones at the top. Each notification includes a date and time stamp.

Unread **notifications** appear in **bold**. Clicking on a notification will mark it as read and change the font style. You can also click **Clear All** to remove all notifications.

🔔 Exported reports that are ready for download will appear here.

Notification (2)

Your file has been done importing.
0 success 11 failed, click here to download.
2021-10-26 14:47:41

[Cases by LGPE.xlsx] has been exported,
click here to download.
2021-10-26 14:46:41

Clear All

NGSP – Service Management

- In this **section**, you can create **Cases** and **Work Orders**, as well as perform other functions like checking Service History or Entitlement.

The screenshot displays the NGSP (Next-Gen Service Platform) interface. At the top left, the 'Lenovo NGSP' logo is visible. A navigation menu on the left lists various options: Dashboard, Service Management (highlighted with an orange box), Case, Work Order, RMA, Cases & Work Orders, Service History, Entitlement Check, Part Search, Batch Upload, Archived Data Search, and Report Management. The main content area shows the 'Front Desk Dashboard' with a breadcrumb 'Home / Dashboard'. A bar chart titled 'Open WOs by Status' shows a single bar for 'Awaiting Order Release' with a value of approximately 200. Below the chart is a table titled 'Open WOs' with a search bar and two rows of case numbers: 2001459611 and 2001462853.

NGSP – Case view & create

In the **Case** view all cases associated with the selected location will be listed.

ⓘ If you are associated with multiple locations, be sure to check which **Location** is selected at the top of the page..

You can customize this view by selecting additional columns from the drop-down menu.

If you wish to look for a specific case, you can narrow down your search by:

Case number Serial number or add extra filters from the dropdown menu

Case

Case Number: Serial Number: Location:

Filters Search Clear

- Customer Name
- Customer Email
- Customer Contact Number
- Case Type
- Incoming Channel
- Case Priority
- External Reference Number
- Case Status

Or Click the case number on the list

Case Number	Location	Case Status	Case Priority	MTM
2001529344	1210100204 - PSPD CompuCom CA	WO Created	Priority-3 (Med)	20Q1CTO1WW
2001526595	1210100204 - PSPD CompuCom CA	New	Priority-3 (Med)	20Q1CTO1WW
2001526457	1210100204 - PSPD CompuCom CA	WO Created	Priority-3 (Med)	20Q1CTO1WW
2001525943	1210100204 - PSPD CompuCom CA	WO Created	Priority-3 (Med)	20Q1CTO1WW
2001525942	1210100204 - PSPD CompuCom CA	WO Created	Priority-3 (Med)	20Q1CTO1WW
2001525941	1210100204 - PSPD CompuCom CA	WO Created	Priority-3 (Med)	20Q1CTO1WW

Click on Search

NGSP – Case view & create (continue)

Create Case

i Before clicking on [Create Case](#), make sure the correct location is selected—if you're associated with multiple locations.

Step 1: Entitlement

Enter the Serial Number in the *Serial Number field* and click on [Entitlement Check](#).

For Option devices, select **Yes** on the Options field, fill in the MTM* and click on [Entitlement Check](#).

i If the **Serial Number** has been previously serviced by your location, the system will display a **Duplicate Active Case and Work Order** warning. You can review the existing Case or Work Order by clicking on their name or number—each will open in a new tab. If you don't need to review them, simply close the message by clicking the **X**.

If applicable, you can continue working on an existing Case and/or Work Order.

Product

Product

Serial Number:

Entitlement Check

Options ⓘ: Yes No

* MTM ⓘ:

Duplicate Active Case and Work Order

Open case or work order exists with the same serial number. Are you sure you wish to proceed ?

Case Title	Case Number	Case Status	Created At
Machine failing	2001507102	New	2023/01/09 19:33
Isump 11.08	2001484983	WO Created	2022/11/08 17:08

Work Order Number	Work Order Status	Created At
4005169202	Unit Received	2022/11/10 17:10
4005169065	Awaiting Order Release	2022/11/09 17:40
4005169063	Order Accepted	2022/11/09 17:23

NGSP – Case view & create (continue)

Repeat repair reason field will be mandatory if the **Repeat Repair toggle** is **Yes**.

i The **Repeat Repair** flag is applied at a Serial Number level. If any previous repair was performed on the same Serial Number, the system will automatically set the toggle to Yes. **This will not impact your reimbursement, if applicable.**

If your Location has previously serviced the Serial Number, the system will pre-populate your customer data. **This information can be changed if needed.**

Click on **Next**.

Step 2: Customer Data

Fill in the Customer information; fields with a red asterisk (*) are mandatory.

(*) First Name:

(*) Last Name:

Company Name: [This is the Customer's company name \(if applicable\)](#)

Business Partner Number: [Please leave blank.](#)

House Number:

Customer ID: [System will generate a customer ID number for later use.](#)

(*) Customer Address1: [This will be used as the Customer address in the Repair Location and Part Ship-to Location fields in your Work Order if customer value is selected.](#)

Customer Address2:

(*) Customer City:

(*) State/Province:

(*) Country/Region:

(*) Customer Postal Code:

(*) Customer Email:

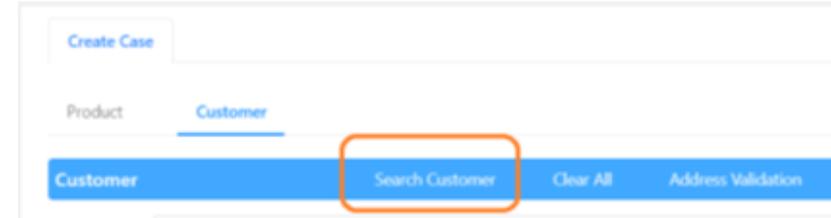
(*) Customer Contact Number: [This is the Customer's phone number.](#)

The screenshot shows a form for creating a case. At the top, it displays 'MTM ⓘ: 20LNS1P700'. Below this, there is a 'Repeat Repair ⓘ: Yes' toggle switch. Underneath the toggle is a text input field labeled '* Repeat Case Reason:' with a dropdown arrow on the right. The entire form area is highlighted with an orange border.

NGSP – Case view & create (continue)

Customers previously saved by your Location can be found by clicking on [Search Customer](#).

On that screen, enter your customer's first name, last name, or Customer ID, then click [Search](#).



i The **Customer ID** can be found in your Customer Management section within the Navigation Menu.

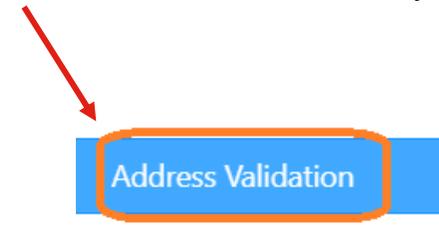
Saved customer records will be displayed. Select the correct one and click on **OK**. Otherwise, click on **Cancel**.

You can edit the information of a previously saved customer. The updated details will be saved and reflected in the Customer Management section within 24 hours.

A screenshot of the 'Search Customer' dialog box. It contains several input fields: 'First Name' (with 'Miemail' selected), 'Last Name', 'Customer ID', 'Business Partner Number', 'Company Name', 'Street 1', 'Customer Email', and 'Customer Contact Number'. A 'Search' button is highlighted with an orange box. Below the fields is a table titled 'Retrieved Customer' with columns for Customer ID, First Name, Last Name, Company Name, Business Partner Number, Customer Email, Customer Contact Number, and Address. The table contains three rows of data. At the bottom right, there are 'Cancel' and 'OK' buttons, with the 'OK' button highlighted with a red box.

We recommend always validating the address when adding a new customer by clicking **Address Validation**, as it may be used as the order's **Part Ship-to Location**.

Once ready, click on **Next**.



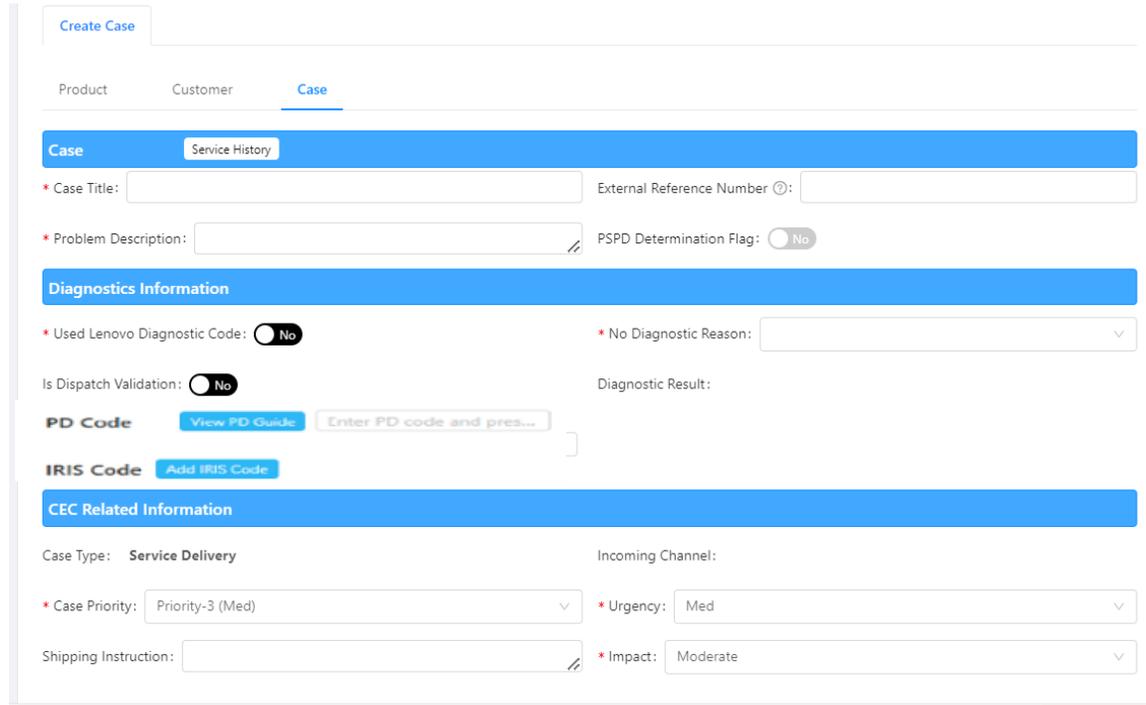
NGSP – Case view & create (continue)

Step 3: Case identification

Fields with a red asterisk (*) are mandatory to identify the case.

- (*) Case Title:
- (*) Problem Description:
- (*) Used Lenovo Diagnostic Code: pre-set to **No**
- (*) No Diagnostic Reason: please choose **BP** from the dropdown list.

Case Priority, Urgency, and Impact are **predefined fields**. Please do not modify them. 



 The information entered in the following fields during case creation will automatically carry over to the Work Order.

(Does not apply to Batch upload work orders)

CASE field	transferred to	WORK ORDER field
External Reference Number	info will be pre-populated in	External Reference Number
Problem Description	info will be pre-populated in	Diagnostic Notes
Repeat Reason	info will be pre-populated in	Repeat Reason

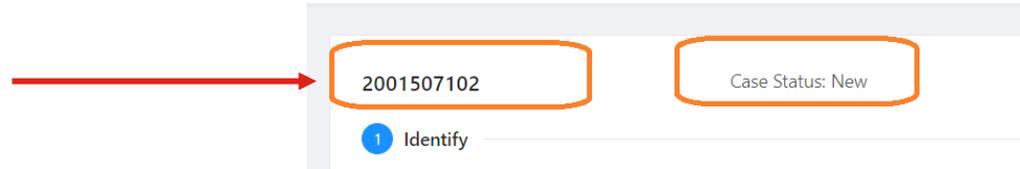
When ready, click on **Submit**.

Notes: The information that is pre-populated in each work order can be manually edited by the partners if they need to change or add anything.

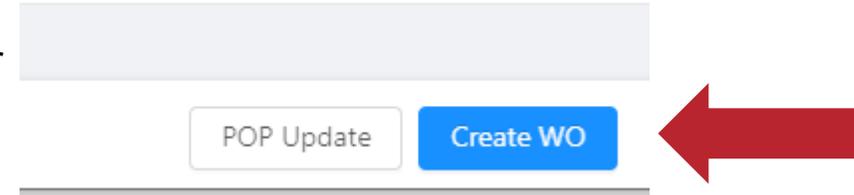
If a case has more than one work order, the information from these 3 fields will only be pre-populated in the first work order, not in any of the subsequent work orders created.

NGSP – Case created – What’s next ? – Work Order

After Clicking on **Submit**, the case will be created.



After the case is created, click **Create WO** in the bottom right-hand corner to create a Work Order.



If you have an existing case, you can go to Cases & Work Orders view and click on **Create WO** in the “Next Best Action” column.

Use the Search Bar’s sort and filter to find the case you need.

A screenshot of the 'Cases & Work Orders' view in a service management system. The interface includes a sidebar with navigation options like 'Case', 'Work Order', 'RMA', 'Cases & Work Orders', 'Service History', 'Batch Upload', and 'Entitlement Check'. The main area shows a table of cases with columns for Case#, SN / External Ref #, WO # / Tech Name, WO / Order Type, Status, Aging Days, and Next Best Action. Two cases are listed, both with 'Create WO' buttons in the 'Next Best Action' column. A search bar at the top allows filtering by case number, work order number, or serial number. A red arrow points from the text 'Use the Search Bar’s sort and filter to find the case you need.' to the search bar. A green 'Create Case' button is visible in the top right corner of the main area.

NGSP – Work Order (continue)

Once you click **Create WO**, the Create Work Order page will open.

At the top of the page, you will find:

- Tabs with the original case information and any Work Orders created from that case.
- Name of the Work Order taken from the case.
- Jump links that take you to different sections of the page.

The screenshot shows the 'Create WO' page in the NGSP system. At the top, there is a navigation bar with a hamburger menu, a dropdown for 'United States-Sound Microsystems', a search bar, a 'Create Case' button, and a user profile for 'montanercm@hotmail.com'. Below the navigation bar, there are two tabs: 'Case Info New' and 'Create WO New'. A red arrow labeled 'Tabs' points to these tabs. The 'Create WO New' tab is active and shows a work order with the ID 'dddccsss' and a last modified date of '2023-02-09'. A red arrow labeled 'Jump links' points to the 'Jump To Parts' and 'Jump To Service' links. Below the work order details, there is a 'Work Order Information' section with a blue header. This section contains several input fields: '* Work Order Type:' (dropdown), '* Order Type:' (dropdown), 'Technician Name:' (dropdown), 'Technician Skill Level:' (dropdown), 'Technician Compatibility Result:' (text: 'Not checked yet'), 'Minimum Technician Skill Required:' (text), 'External Reference Number:' (text), 'Repeat Repair' (toggle: 'No'), 'Work Order Priority:' (text: 'Premier'), and 'Program:' (text). Below this section is an 'Initial Diagnostics' section with a blue header and a 'KEY DATES' section.

NGSP – Work Order (continue)

Fields with a red asterisk (*) are mandatory to create a new **Work Order**. Each step in the Work Order creation process will require different mandatory fields.

(*) **Work Order Type**: Always pick **AWSP**, if not prepopulated.

(*) **Order Type**: this is your **Service Type**. **NEVER select Machine DOA**.

- If **Engineering Change ECA** is selected, (*) ECA number field will appear.
- If **DOA** is selected, (*) Original DOA WO Number field will appear. **Enter Work Order number in which the defective replacement part was received.**
- If **Labor Only** is selected, (*) the Labor Only type field will appear. There are **4 types** of possible **Labor Only Work Orders**:
 - **ADP**: (*) Service Code to confirm the repair done will become a mandatory field.
 - **Standard**: (*) Service Code to confirm repair done will become a mandatory field.
 - **Software/Firmware**: (*) PD Code is mandatory. When entering it manually, format it as **PDTHT002998**, where **PDT must be added**, followed by the tip (**HT002998**). Alternatively, use the PD Tree button to select the code.
 - **CRITSIT**: (*) CritSit Case number will be mandatory.

ⓘ Order Type will be auto populated with “Options Claim” if you selected YES for Options in the case.

Technician ID: Select your Service Technician from the drop-down list.

External Reference Number: This is a reference number of your choice, which will appear on your parts' packing list and shipping label as **BP Ref/BP Ref ID**. It's advisable to fill this field in. The character limit is 35.

NGSP – Work Order (continue)

Repeat repair reason: This field is mandatory only if the [Repeat Repair toggle](#) is set to **Yes**. Select the reason that best matches your repair. This will not affect your reimbursement, if applicable.

AWSP Repeat repair: tracks whether this is the first time your location has repaired the unit.



Repeat Repair Reason: **Part DOA**

Repeat Count: **12**



AWSP Repeat Repair: **Yes**

Repeat Repair : **Yes**

Part Ship To Location: **Customer**

Repair Location: **Customer**

(*) **Part Ship To Location:** choose from the down drop menu. There are 4 options:

- [Customer](#)
- [Technician](#)
- [Dealer](#)
- [Alternate](#) If chosen, a popup screen will appear so you can pick a saved address or enter a new one.

(*) **Repair Location:** This address is used for tax calculations. Even though it's not a mandatory field, [please make sure to always complete it.](#)

The screenshot shows a portion of the NGSP Work Order form. The 'Repeat Repair' toggle is set to 'Yes'. The 'Part Ship To Location' dropdown menu is open, showing four options: 'Customer', 'Technician', 'Alternate', and 'Dealer'. A red arrow points to this dropdown menu. The 'Repair Location' field contains the address '5 Dorchester Ave, Boston, 02122'. Other fields visible include 'Repeat Count: 703', 'AWSP Repeat Repair: No', and 'Work Order Priority: Medium'. A blue bar at the bottom of the form contains the text 'Initial Diagnostic'.

NGSP – Work Order (continue)

Work Order Priority: Prepopulated based on the unit's entitlement. Do **NOT** modify this field.

Actual Performed Date: The date the repair was completed.

Diagnostic Note: This is your **Failure Description**. Please provide a **detailed problem determination** and the repair steps. This field is **mandatory** to complete the Work Order. Once completed, the Work Order becomes eligible for metrics calculations and labor reimbursement, if applicable.

Service Level Information

* Actual Service Type:

Actual Service Type (*) : This is your Service Delivery Type.

- **Onsite-FRU:** **Should only be selected if the unit is entitled.** If it is not entitled, system will regard repair as **Out of Warranty** and **it will be subject to review for possible invoicing.**
- **Bring In:** Former **Carry in.**
- **Parts only:** **Do not select this Actual Service Type unless expressly instructed by Lenovo.**

Repair Notes (*) : This field is where you can enter the **repair steps performed, any additional repair comments, and confirm that the repair was successful.** It is **mandatory** to complete the **Work Order**. Once completed, the Work Order becomes eligible for metrics calculations and labor reimbursement, if applicable.

Examples

Diagnostic Notes:

ADP (Accidental Damage Protection): Machine was dropped by the end-user. LCD cracked and left corner bezel damaged. The rest of the machine is functional

Base Warranty: Some keys may malfunction and not work properly. Technical tip applicable HT508078.

Repair Notes:

ADP (Accidental Damage Protection): LCD and Bezel replaced. Machine repaired successfully

Base Warranty: The 300e Chromebook keyboard replaced. I ensured the keyboard ribbon cable was not folded or bent as technical tip recommend. Machine repaired successfully.

NGSP – Work Order (continue)

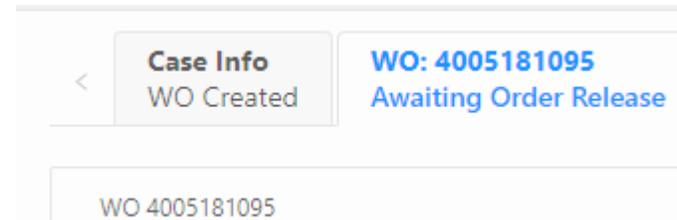
Once all required fields are completed, the system will show a **Success** message, and **your Work Order number will be generated.**

If any mandatory field is missing, the Work Order number will not be generated, and **the system will highlight the incomplete field in red.**

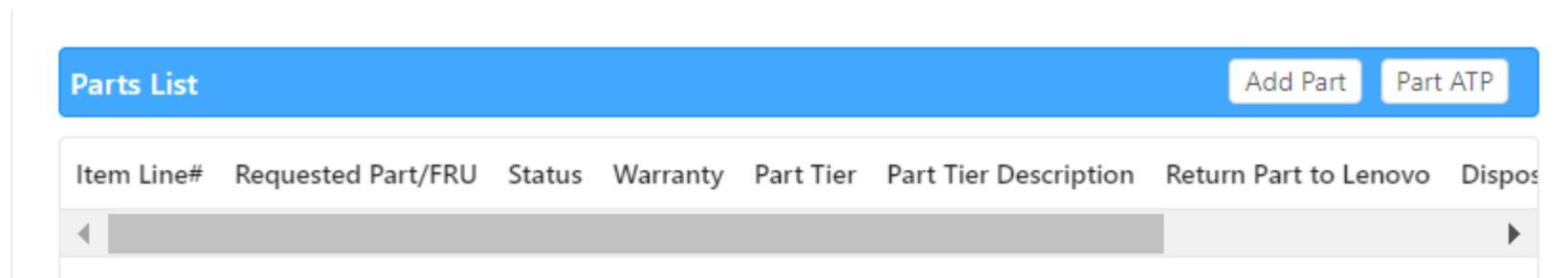
ⓘ You will get a pop-up warning if the technician selected is not qualified to perform the repair.

Once your Work Order number is generated, you're ready to start ordering parts!

Your Work Order will be in **“Awaiting Order Release”** status.



To order parts, click on **Edit WO** at the bottom of the screen to enter edit mode, then click on **Add Part**. The system will prompt a new window (see the example on the next slide).



NGSP – Work Order (continue)

Machine information

Parts Search

Product

Serial Number: PC1A4CM8 MTM: 20Q1CT01WW MT: 20Q1 Part ID:

* Country: United States * Language: English Include MT BOM parts: CRU Only: Commodity Category:

Clear Filters

Search

You can enter part number.

if you want to filter by commodity type, select from the drop-down list.

Then click on **Search**

BOM

Retrieved Products

Serial Number	FRU	FRU Description	CRU Tier	CRU Tier Description	Bom Indicator	Qty
+ <input type="checkbox"/>	02HL005	MECH_ASM A-Cover,Black,PPS,HD	9	FRU only	As Built	1
+ <input type="checkbox"/>	02HL009	MECH_ASM B-Cover,Black,w/Shutter	9	FRU only	As Built	1
+ <input type="checkbox"/>	01YU005	TRAY,SD,Black	1	CRU mandatory	As Built	1
+ <input checked="" type="checkbox"/>	01YU061	CS16_2BCP,MYLAR,BLACK,SUN	9	FRU only	As Built	1

Total: 39 < 1 2 3 4 5 6 7 8 > 5 / page

You can also filter by any of the columns in this section by clicking the magnifying glass icon

To select a part from the **BOM**, check the box next to it, and it will appear in the **Selected Products list**.

Max 5 parts allowed per Work Order.

Selected Products

Action	Serial Number	FRU	FRU Description	CRU Tier	CRU Tier Description	Bom Indicator	Sellable Flag	Qty
Delete		01YU061	CS16_2BCP,MYLAR,BLACK,SUN	9	FRU only	As Built		1

Ok Cancel

Once you have selected the parts needed, click **OK**

If you need to remove any part selected, click on **Delete**.

NGSP – Work Order (continue)

Further comments on previous slide:

Your unit's **Build of Material (BOM)** will be displayed. To find a specific part, enter its number in the **Part ID** field and click **Search**.

You can filter by **Commodity Category** by selecting from the dropdown list, or filter any of the columns in the **Retrieved Products** section by clicking the magnifying glass icon.

Once you have found the part you need, click the checkbox next to it. All added parts will appear in the **Selected Products** section. In this screen, you can remove any incorrect parts by clicking **Delete**.

- ❗ Do **NOT order out of scope parts**. i.e.: Parts that are **not** listed in the unit's BOM.
- ❗ There is a **minimum of 1 part per Work Order**, except when Order type is **Labor only**.
- ❗ The **maximum** quantity allowed is **3 parts per Work Order for the US and Canada**.

Once you have selected all your products, click on **OK**. The system will take you back to the Work Order screen.

All parts added will be displayed in the **Products section** of the Work Order. If you missed a part, you can use the **Add Part** function again, keeping the maximum quantity allowed per country in mind.

- ❗ If you've selected an incorrect part or one that shows as out of warranty (as explained in the next slide), click on **Cancel WO** and select only that part before clicking on **Dispatch**.

AFTER YOU HAVE CLICKED *DISPATCH*, DO NOT ATTEMPT TO CANCEL THE WO. IF YOU NEED TO CANCEL THE WO, OR A PART ORDERED, PLEASE CONTACT THE SMSC AT smsc@lenovo.com

NGSP – Work Order (continue) – Parts out of warranty

Once the Case and Work Order have been created, and after selecting the parts, you will find a column named **Warranty** under the Parts List section. This column may display one of the following messages:

- Base Warranty
- Extended Warranty
- Out of Warranty



Parts List Add Part Part ATP

Item Line#	Requested Part/FRU	Status	Warranty	Part Tier	Part Tier Description	Return Part to Lenovo	Disposition	Not in SBOM	Other Reason
20	5B10W67369 Lenovo BATTERY 3cell 42 Wh 11.25V	Pending Tgt Delivery 2024-02-06 02:00:00	Out of Warranty	9	FRU only	No	<input type="text"/>	<input type="text"/>	<input type="text"/>
30	5H51A14268 HINGE (L+R) B 81M9	Pending Tgt Delivery 2024-02-06 02:00:00	Extended Warranty	9	FRU only	No	<input type="text"/>	<input type="text"/>	<input type="text"/>

Services Provided

Repair Notes: dsa

Service

Line Order	SAP Service	Product Item Type	Accounting Indicator	Description	Work Order Service Status	Closing Code	Gross Price(Total)	Discount(Total)	Tax	Net Price(Total)	Action
10	CIAWSP2	FS Labor	Extended Warranty	AWSP Labor	Pending	<input type="text"/>					delete

Save X Cancel Wo Dispatch

If a part shows as **out of warranty**, you can cancel the specific item with the expired warranty and dispatch the remaining parts if they are covered under base or extended warranty.

Before clicking on Dispatch, you can select **Cancel WO** at the bottom of the page. You can either cancel all parts along with labor reimbursement or cancel only the specific part number.

If Dispatch has already been clicked, please contact the **SMSC** Team providing the **work order number**, **part number you wish to cancel**, and **the reason for the cancellation**. If the part has not been shipped, we will proceed with the cancellation request.

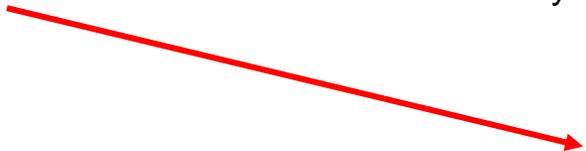
If the part has already been shipped, you can return it **unused** and, if necessary, order a replacement by **creating a new work order**.

NGSP – Work Order (continue)

ATP Check

Once you have selected the parts you require, you can click on **Part ATP** to check the **Part's ETA**. The system will update the **Committed Delivery Date** as well as the **Shipped part #** column.

You need to be on **Edit mode** to see the **ATP check** button.



Parts List Add Part Part ATP

Item Line#	Requested Part/FRU	Status	Warranty	Part Tier	Part Tier Description	Return Part to Lenovo	Dispos
30	02DC197 FRU SCREW Mylar	Released Tgt Delivery 2023-03-24 05:30:00	Base Warranty	9			
40	5SS1B60643 Original part 00UP651	Released Tgt Delivery 2023-03-27 08:26:42	Base Warranty	2			

Parts List

Item Line#	Requested Part/FRU	Status	Warranty	Part Tier
30	02DC197 FRU SCREW Mylar	Released Tgt Delivery 2023-03-24 05:30:00	Base Warranty	9
40	5SS1B60643 Original part 00UP651	Released Tgt Delivery 2023-03-27 08:26:42	Base Warranty	2

Part number updated

Committed Delivery Date

NGSP – Work Order – Cancel Work Order

Cancel Work Order

We recommend reviewing the Work Order carefully *before clicking on Dispatch*, to ensure the selected parts and technician are correct.

If you need to cancel a part: Click on *Edit WO*, then *Cancel WO*. A new window will pop up for you to select the part you wish to cancel. Choose the appropriate cancellation reason from the dropdown list and click *Initiate Cancellation*.

The screenshot shows the NGSP interface. On the left, the 'Parts List' table is visible:

Item Line#	Requested Part/FRU	Status
20	01HW028 CAMERA Camera,HD,USB,2MIC,UF,WTB,Chy Subbed with 5C21C16298	Pending Tgt Delivery 2023-01-30 04:00:00
30	01AX769 WIRELESS Wireless,CMB,IN,22260 NV Subbed with 02HK705	Pending Tgt Delivery 2023-01-30 04:00:00
40	02DC025 FRU LLA Camera Cable	Pending Tgt Delivery 2023-01-27 05:30:00

Below the 'Parts List' is the 'Services Provided' section. A red arrow points to the 'Cancel Wo' button in the 'Services Provided' table:

Line Order	SAP Service	Product Item Type	Accounting Indicator	Description
10	CIAWSP2	FS Labor	Upgrade Warranty	AWSP Labor

The modal window titled 'Cannot check items not allowed to cancel' is shown on the right. It contains a table of items to be cancelled:

Item	Product	Description	Status
10	CIAWSP2	AWSP Labor	Pending
20	01HW028	Camera,720P,Front,2MIC,WTB,Chy	Cancelled by Lenovo
50	5C21C16298	CAMERA Camera,HD,USB,2MIC,UF,WTB,Chy	Pending
40	02DC025	FRU LLA Camera Cable	Pending

A red arrow points to the 'Initiate Cancellation' button at the bottom of the modal window. The 'Cancellation Reason' dropdown is set to 'Customer Request'.

ⓘ If you have already clicked on **Dispatch**, please do **NOT** attempt to cancel the **WO** yourself. Contact the **SMSC** (smc@lenovo.com) for assistance.

NGSP - Work Order - Dispatch

Status will change to order released once **dispatched**

Once all mandatory fields are completed and all necessary parts have been added to the Products section, save your Work Order. Its status will then be set to **“Awaiting Order Release.”**

You **MUST** click on **Dispatch** to release the Work Order. This action notifies Lenovo that your order is complete, and you are ready to receive the requested parts.

ⓘ “Closing code is NOT mandatory for NA locations. LEAVE FIELD BLANK”

WO: 4005117936 Awaiting Order Release

WO: 4005186654 Order Released

All mandatory fields have been completed

Dispatch

Actual Service Type: BRING IN

Edit WO **Cancel WO**

Item Leaf	Requested Part/PU	Status	Warranty	Part Tier	Part Description	Return Part to Lenovo	Disposition	Part's Stock	Other Reason
20	82D13F PU/SCREEN Hinge	Pending	Base Warranty	3	PU Only	No			
40	82D13K40 Original part (SFP)	Pending	Base Warranty	1	Optional	No			

ⓘ To view the Dispatch button, you must first enter Edit mode. You can find the Dispatch button at the bottom left of your screen.

NGSP – Work Order - *Statuses*

After clicking **Dispatch**, the Work Order and Product statuses will update. The standard sequence in the Product Status column is as follows:



When the **Product Status** column updates to **Delivered**, you may proceed with your repair.

Parts List				
Item Line#	Requested Part/FRU	Status	Warranty	Part Tier
10	00PH133 MOUSE USB Calliope Mouse BK Subbed with 00PH133	Pick - Pack Tgt Delivery 2022-08-18 05:00:00	Base Warranty	

Parts List				
Item Line#	Requested Part/FRU	Status	Warranty	Part Tier
10	00PH133 MOUSE USB Calliope Mouse BK Subbed with 00PH133	Shipped Tgt Delivery 2022-08-18 05:00:00	Base Warranty	

Parts List				
Item Line#	Requested Part/FRU	Status	Warranty	Part Tier
10	00PH133 MOUSE USB Calliope Mouse BK Subbed with 00PH133	Delivered Delivered on 2022-08-17 03:41:32	Base Warranty	

NGSP - Create a new Work Order that automatically goes to **Finish Repair**

ONLY for WSMs & TPMs

Step 1 – Create the case, if it hasn't already been created.

Step 2 – Create the Work Order – **Besides the mandatory fields, make sure the following fields are completed before clicking on [Submit](#). (example on next slides)**

- **Technician Name**
- **Actual Performed Date**
- **Diagnostic Notes**
- **Repair Notes**

Step 3 – After clicking on [Submit](#), click on [Edit WO](#) to add the parts needed, unless it is a Labor Only WO.

Step 4 – The [Add Part](#) button will appear. Click on it to add the parts to your WO.

Step 5 – Once the parts have been added. Make sure **all the fields mentioned above are completed** then click on [Dispatch](#).

After the Work Order is dispatched with all the required fields completed, the Labor line will be automatically updated to "**FIXED**", and the Work Order status will change to "**Repair Completed**".

The screenshot shows a Work Order interface with three tabs: 'Case Info', 'WO: 4005127639 Order Accepted', and 'WO: 4005127641 Repair Completed'. The 'Repair Completed' tab is highlighted with an orange box. Below the tabs, the work order details for 'WO 4005127641' are shown, including the description 'Test backfill load' and the last modified date '2023-04-18'. At the bottom, a progress bar indicates the status of the work order, with 'Finish Repair' marked as complete and 'Parts Ordered' as the next step.

ⓘ You might receive a warning message saying “Cannot move to next BPF”. This is just a **warning**, and you can **disregard it**.

NGSP - Create a new Work Order that automatically goes to **Finish Repair**

Work Order Info

Work Order Type: **AWSP** Order Type: **Customer Limited Warranty**

* Technician Name: **Joe Technician** ← Technician Name External Reference Number:

Exception Approval Code: Repeat Repair Reason: **Unrelated Product Failure**

Repeat Repair Yes No Repeat Count: **176**

Part Ship To Location: Dealer **88888 888 SSSSS JJJJJJJ SSSSSSSSSSS SSSSS SSSSSSS,SSSSSSS, , SSSSSSS, 98104** AWSP Repeat Repair: No Yes

Repair Location: Dealer **88888 888 SSSSS JJJJJJJ SSSSSSSSSSS SSSSS SSSSSSS,SSSSSSS, , SSSSSSS, 98104** Program:

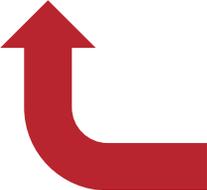
Work Order Type: **AWSP**

Order Type: Choose from the drop down menu.

Technician Name: Choose from the drop down menu.

Part Ship to Location: Choose from the Drop down menu based on the specific case.

Repair Location: Choose from the Drop down menu based on the specific case.



The screenshot shows the 'Work Order Information' form with the following sections and fields:

- Work Order Info:** Work Order Type (AWSP), Technician Name (Joe Technician), Exception Approval Code, Repeat Repair (Yes), Part Ship To Location (Dealer, 88888 888 SSSSS JJJJJJJ SSSSSSSSSSS SSSSS SSSSSSS,SSSSSSS, , SSSSSSS, 98104), Repair Location (Dealer, 88888 888 SSSSS JJJJJJJ SSSSSSSSSSS SSSSS SSSSSSS,SSSSSSS, , SSSSSSS, 98104), Order Type (Customer Limited Warranty), External Reference Number, Repeat Repair Reason (Unrelated Product Failure), Repeat Count (176), AWSP Repeat Repair (No), Program.
- Initial Diagnostics:** KEY DATES (Actual Performed Date: 2023-07-18), PRODUCT INITIAL CONDITION (Diagnostic Notes: Demonstration), PD Code (View PD Guide, Enter PD code and press...), IRIS Code (Add IRIS Code).
- Service Level Information:** Actual Service Type (BRING IN), Actual Service Level (Next Business Day).
- Parts List:** Table with columns: Item Line#, Requested Part/FRU, Status, Warranty, Part Tier, Part Tier Description, Return Part to Lenovo, Disposition, Not in SBOM, Other Reason. (No Data)
- Services Provided:** Repair Notes (Demonstration).
- Service:** Table with columns: Line Order, SAP Service, Product Item Type, Accounting Indicator, Description, Work Order Service Status, Closing Code, Gross Price(Total), Discount(Total), Tax, Net Price(Total), Action. (No Data)

Submit

NGSP - Create a new Work Order that automatically goes to **Finish Repair**

After Clicking on Submit, the work order page will refresh

- 1. Click on **Edit WO**
- 2. The **Add Part** button will appear. Click on it to add the parts needed

The screenshot shows the NGSP Work Order interface for Case Info WO: 4005203407. The page is titled "NGSP guide 6" and includes a navigation bar with tabs for "Work Order Information", "Date Information", "Reimbursement Details", "Change Log", and "Remark".

Key sections include:

- Work Order Info:** Displays details such as Work Order Type (AWSP), Order Type (Customer Limited Warranty), Technician Name (Joe Technician), and Exception Approval Code.
- Initial Diagnostics:** Shows Key Dates (Actual Performed Date: 2023-07-18) and Product Initial Condition (Diagnostic Notes: Demonstration).
- Parts List:** A table with columns for Item Line#, Requested Part/FRU, Status, Warranty, Part Tier, Part Tier Description, Return Part to Lenovo, Disposition, Not in SBOM, and Other Reason. The table is currently empty.
- Services Provided:** Shows Repair Notes (Demonstration).
- Service:** A table with columns for Line Order, SAP Service, Product Item Type, Accounting Indicator, Description, Work Order Service Status, Closing Code, Gross Price(Total), Discount(Total), Tax, and Net Price(Total).

Annotations include:

- A red arrow pointing to the **Edit WO** button in the bottom left corner.
- An orange box highlighting the **Edit WO** button.
- An orange box highlighting the **Add Part** button in the Parts List section.
- A red arrow pointing to the **Add Part** button.
- An orange box highlighting the **Add Part** button in the top right corner.

NGSP - Create a Work Order after repair has been completed that goes automatically to **Finish Repair** **RECOMMENDED for ASPs**

If a **warranty repair has been successfully completed** using authorized Lenovo parts —purchased by the Service Provider or “replenishment orders”— create the Work Order by following the steps below:

Step 1 – Create the case, if it hasn't been created.

The screenshot shows a 'Create Case' form with a 'Customer' tab selected. The form contains several input fields: First Name (Scott), Last Name (Lee), Company Name, Business Partner Number, House Number, Customer ID (8029489807), Customer Address1 (3rd street), Customer Address2, Customer City (Markham), State/Province (Ontario), Country/Region (Canada), Customer Postal Code (L6B 1B6), Customer Email (user1@lee.com), and Customer Contact Number (+1 6479992998). A 'Notify Customer on Update' toggle is set to 'No'. The 'Survey Preference' field is highlighted with a red box and a red arrow pointing to it, and is currently set to 'Yes'.

Important: Please review the customer survey preferences in the **case** to ensure that it is set to **YES**, before filling out the information listed in step 2 and clicking on **Dispatch**. It ensures that the survey will be sent.

Step 2 – Create the Work Order by filling in the required information in the following fields:

2.1 Order Type

2.2 Technician Name

2.3 Parts ship to Location

2.4 Repair Location

2.5 Actual Service Type

2.6 Diagnostic Notes

2.7 Actual Performed Date

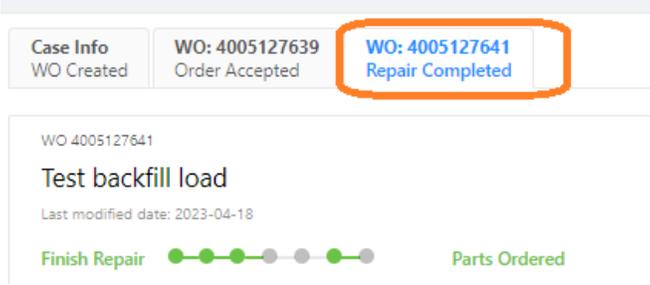
2.8 Repair Notes

NGSP - Create a Work Order after repair has been completed that goes automatically to **Finish Repair**

Step 3 – After clicking on **Submit**, click on **Edit WO** to add the parts needed, unless it is a Labor Only WO.

Step 4 – The **Add Part** button will appear. Click on it to add the parts.

Step 5 – Once the parts have been added. Make sure **all the fields listed above are filled** then click on **Dispatch** to release the order. The **Finish Repair** will be processed without any further action required. Since all the order's fields were completed, the Labor line is automatically updated to **FIXED**, and the Work Order status will be **Repair Completed**



By following these steps, once the **"Finish Repair"** has been processed, no further action is required on your end and the **customer survey will be issued automatically.**

NGSP – Work Order – Finish Repair

When parts were requested to repair the unit

When the parts ordered are delivered, the Work Order status will change to **In Repair**. After you have fixed the computer and before clicking on **Finish Repair**, click on **Edit WO** to **complete the Diagnostic Notes & Repair Notes fields**.

Diagnostic Notes (*): This is your **Failure Description**. Please enter **full problem determination** and repair steps. This field is **mandatory** when creating the **Work Order**, but you can add new information if needed. Remember that this field becomes eligible for metrics calculations and labor reimbursement if applicable.

Repair Notes (*): This field is where you can **enter repair steps performed and additional repair comments as well as confirm if the repair was successful**. This field is **mandatory** to complete the **Work Order**. By completing the WO, it becomes eligible for metrics calculations and labor reimbursement if applicable.

Clicking on **Finish Repair** will inform Lenovo that the customer has been taken care of, and the **Work Order** is **completed**.

ⓘ It's essential that you click on 'Finish Repair' to ensure labor reimbursement, if applicable. If this step is skipped, the Work Order will not be picked up for payment.

Examples

Diagnostic Notes:

ADP (Accidental Damage Protection): Machine was dropped by the end-user. LCD cracked and left corner bezel damaged. The rest of the machine is functional

Base Warranty: Some keys may malfunction and not work properly. Technical tip applicable HT508078.

Repair Notes:

ADP (Accidental Damage Protection): LCD and Bezel replaced. Machine repaired successfully

Base Warranty: The 300e Chromebook keyboard replaced. I ensured the keyboard ribbon cable was not folded or bent as technical tip recommend. Machine repaired successfully.

Must click on **Edit WO** to complete all the mandatory fields

To complete the Work Order, you **MUST** click on **Finish Repair**

NGSP – Part Dead On Arrival (DOA)

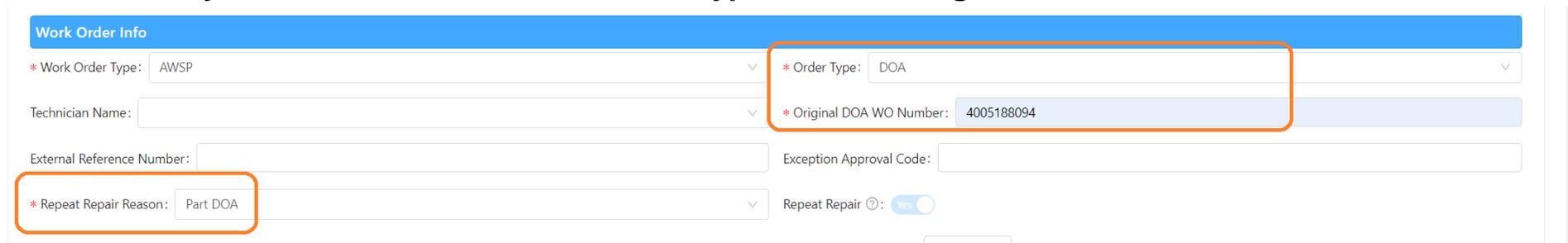
In the event of receiving a **DOA** (Dead on Arrival) replacement part, you will need to submit a [DOA Work Order](#) to re-order.

ⓘ If the original case is still open, you can create the Work Order within it. If the case has already been closed, you'll need to create a new case using the same Serial Number and customer information.

When completing the **Work Order**, make sure to **Select Order Type DOA** and to enter the “parent” work order in the **Original DOA WO number field**.

For the Repeat Repair Reason, select '**Part DOA**'. In the Diagnostic Notes section, provide details about the DOA issue and the steps taken to complete the repair.

ⓘ Make sure that you use the same **Actual Service Type** as in the **Original Work Order**.



The screenshot shows a 'Work Order Info' form with several fields. The following fields are highlighted with orange boxes:

- * Order Type: DOA
- * Original DOA WO Number: 4005188094
- * Repeat Repair Reason: Part DOA

Other visible fields include: * Work Order Type: AWSP, Technician Name, External Reference Number, Exception Approval Code, and Repeat Repair (Yes/No).

Once Work Order number has been generated, click on [Edit WO](#) and then on [Add Part](#).

ⓘ You can only order parts from your original Work Order **if they were delivered within the past 30 days**, in accordance with the Program’s Terms and Conditions. If this timeframe has been exceeded, **the order will not be dispatched and should be canceled**.

NGSP – Labor Only Work Order - PD Code

If you are placing a **Labor Only** order for Software or Firmware, **entering a PD Code is required**.

If you already know the Tip number, you can manually enter it in the following format: **“PDTHT002998”** — where **“PDT” must be added before the Tip** (HT002998). While your cursor is in the field, press Enter on your keyboard.

If you are unsure of the Tip, click on **Knowledge Base** to search for it manually. Once you’ve found the appropriate Tip, click on Copy to populate the field. After closing the popup screen, the **PD Code** will appear in the Work Order.



The screenshot shows a form for entering a PD Code. At the top, there is a label 'PD Code' followed by a text input field containing 'PDTa8_50_tablet_qsg'. To the right of this field is another field containing 'PDTHT073925'. Below these fields are two buttons: 'View Knowledge Base' and 'View PD Guide'. To the right of these buttons is a button labeled 'Enter PD code and pres...'. A dropdown menu is open below the first input field, showing the following details:

PD Code	PDTa8_50_tablet_qsg
PD Level1	KB Tips
PD Level2	KB Tips
Symptom	Quick Start Guide (Multiple Languages) - A8-50 Tablet (A5500)
Updated At	2023-01-12 12:40:04

At the bottom of the dropdown menu is a 'Delete' button.

- ❗ **Failure to add a valid code will generate a hard-stop.**
- ❗ **Pursuant to our Terms and Conditions, Labor Only orders are subject to a manual audit.**

NGSP – Batch Upload

Batch Upload allows you to create **up to 50 cases and/or Work Orders** by uploading a single **Excel file**.

To upload a Batch file, go to **Service Management** in the Navigation Menu and select **Batch Upload**.

Go to **Click to Download Template** and choose **AWSP** from the drop-down menu.

The screenshot displays the NGSP interface. On the left is a navigation menu with the following items: Dashboard, Service Management (expanded), Case, Work Order, RMA, Cases & Work Orders, Service History, and Batch Upload (highlighted in light blue). A red arrow points from the 'Batch Upload' menu item to the main content area. The main content area has a breadcrumb trail: Home / Service Management / Batch Upload. Below the breadcrumb is the title 'Batch Upload'. To the right of the title is the text 'Click to Download Template:' followed by a dropdown menu currently showing 'Blank Template' and an 'Import' button. The dropdown menu is open, showing 'AWSP' and 'Non-AWSP' as options. Below the dropdown is a search bar labeled 'Search by File Name' and a 'My Batch Uploads' dropdown menu.

NGSP – Batch Upload

Note: The batch template varies depending on your role.

For **ASP Admin** and **ASP Admin Level 2** roles, who may manage multiple locations within one batch file, an extra column (Column B) is included. In this column, you need to enter the LOCID and the name of the location.

SECURITY WARNING Macros have been disabled. Enable Content

E5

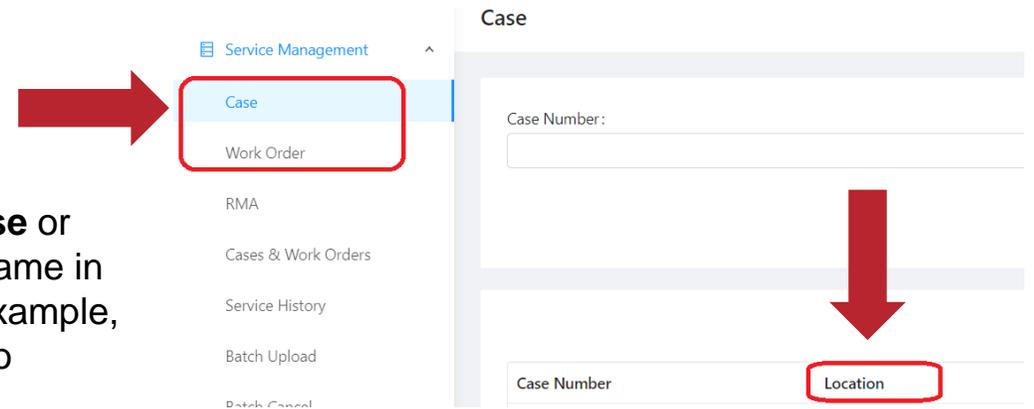
Please don't delete line 1-4 and fill from line 5
line 1: notes; line 2: fields g... line 3: fields; line 4: help text;
color indication:
green: definitely to be prese... ue: conditional; yellow: optional; orange: result fields
AWSP repeat repair calculat... may be delayed and occur after initial creation.

Field Group Line	Order General			
No.	Labor Vendor	Case Number	Work Order Number	BPF
1				
2				
3				
4				
5				

For the **ASP Technician** role, there is no extra column, since **they can only have one location in one batch file.**

B	C	D
Order General		
Case Number	Work Order Number	BPF

i If you're unsure how the location name is displayed, you can find it in the **Case** or **Work Order** view under the **Location** column. Make sure to enter the location name in the correct format with no spaces, using the format **"SAPID-team name"**. For example, if the location is 123456789 – Lenovo testing, you must enter 123456789-Lenovo testing.



NGSP – Batch Upload

Once you open the template:

Begin by enabling the Macro

Select your **Geo** (doing this, hides unnecessary columns for your GEO!)

Pay attention to columns color indication **

** See next slide

DO NOT DELETE, NOR CHANGE LINES 1 TO 4

Begin filling out the file starting from line 5

Number the rows in sequence (Only the rows that have been filled out)

SECURITY WARNING Macros have been disabled. Enable Content

Please don't delete line 1-4 and fill from line 5
 line 1: notes; line 2: fields group; line 3: fields; line 4: help text;
 color indication:
 green: definitely to be present; blue: conditional; yellow: optional; orange: result fields
 AWSP repeat repair calculation may be delayed and occur after initial creation.

- 1) Enable Macro Content when opening this file to ensure, that macro to hide not necessary fields works.
- 2) Hit one of the GEO buttons below to hide unnecessary fields for your GEO
- 3) Fill in all necessary fields
- 4) Hit 'Save "ready to import" template' button and choose folder where you want to save it, hit "Ok"
- 5) Locate your saved template and import to NGSP

EMEA NA BRAZIL
 AP LAS UNHIDE ALL

Save "ready to import" template

Field Group Line	Order General			Product & Warranty				
No.	Case Number	Work Order Number	BPF	Options	Serial Number	MTM	Case Title	Problem Description
				When creating Option WO, enter 'Yes' and MTM will be mandatory	Unique identifier of the product	Machine Model or Product number. Required where multiple machines with the same serial number or for non serialized options	Short summary of issue	Full description of the issue
1								
2								
3								
4								
5								
6								
7								
8								

Accepted
 Finish Repair
 Accepted

Row 4 contains quick description of the information to enter

We recommend to select Accepted

- ① Each row corresponds to a separate Work Order
- ① If the customer information is saved, enter it using their assigned customer ID. **Otherwise, multiple customer records will be generated for the same customer.**
- ① Some fields are for manual input, while others provide a drop-down menu.

NGSP – Batch Upload

**

color indication:

green: definitely to be present; blue: conditional; yellow: optional;

orange: result fields

All the **green** color cells **MUST** be filled out

Serial Number

Blue color cells are conditional to fill out **if needed**, for instance, in this case if requesting an Option must indicate so.

Options

Yellow color cells are optional, except for the Survey Preference (shown below) that must be filled out with a **YES**

Survey Preference

Orange color cells are result fields, populated automatically, except for the **BPF column*****

Order General		
Case Number	Work Order Number	BPF

NGSP – Batch Upload

***After completing the file, it is **recommended to fill out the BPF column**. You have two options to select from the drop-down list:

- **Accepted:** This means you are ready to receive the parts. There is only one step left, which is to click **Finish Repair** once the machine has been repaired.
- **Finish Repair:** This should be selected **ONLY** if no part is needed due to a Labor Only Work Order or if the part requested is simply to replenish your parts stock.

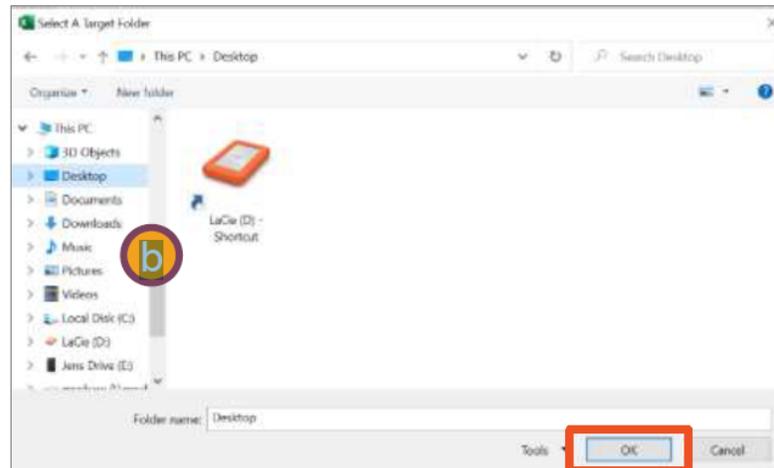
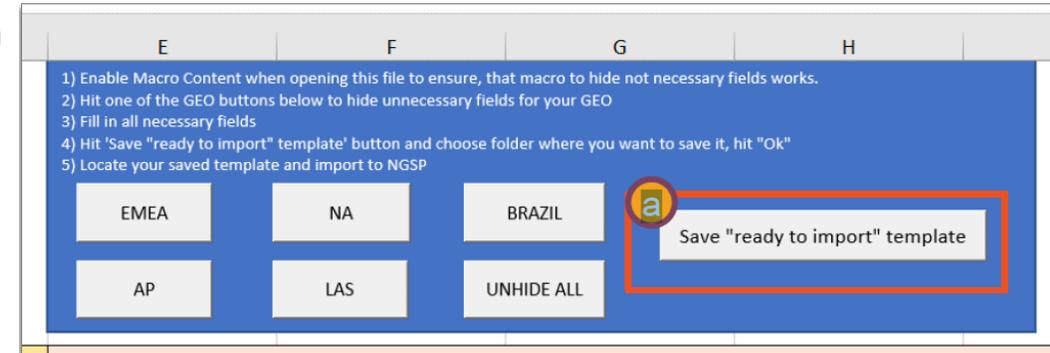


Once the BPF column has been completed

a. Click on **Save "ready to import" template** in the blue box.

b. Choose the folder where you want to save your file. Then click **OK**.

c. Click **OK** in the confirmation window to close it.



***file name will be "batch_upload_template."**

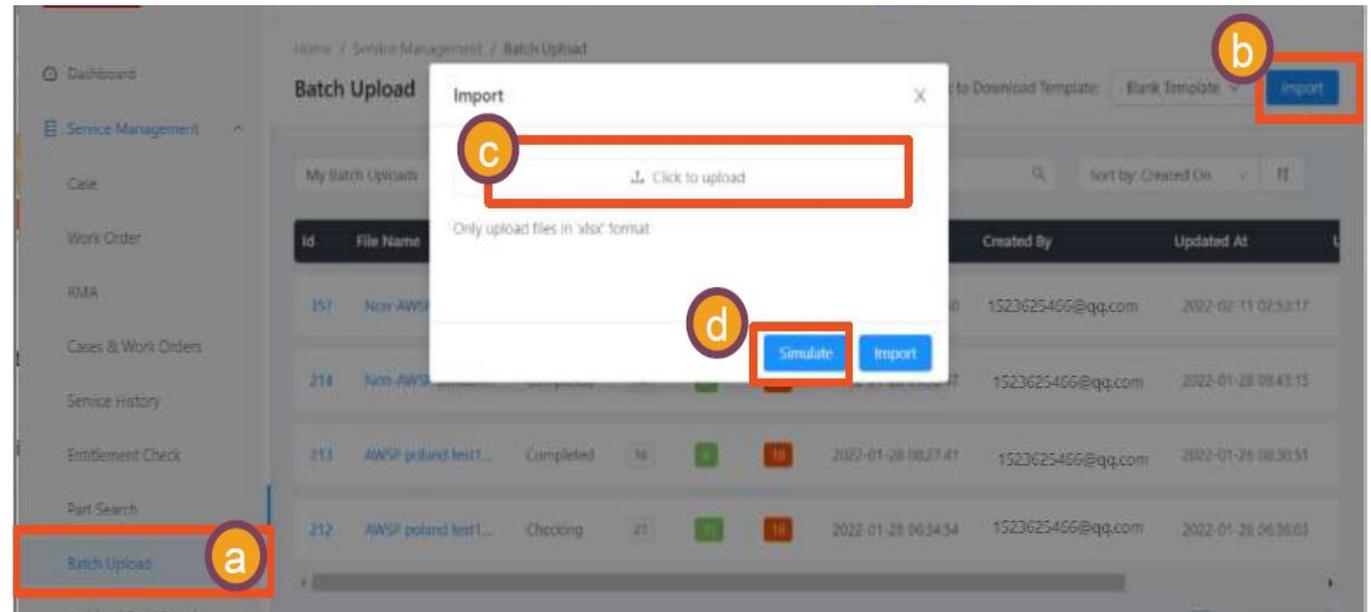
Feel free to change it after being saved.

NGSP – Batch Upload

NGSP offers a way to catch major errors in your file before uploading it. The **Simulation (validation)** feature mimics the import process without actually creating any **NGSP** records.

To run a Batch Simulation

- Click **Batch Upload** in the Navigation Menu.
- Click **Import**. The Import dialog opens.
- Click on **Click to Upload**. A system dialog opens for you to select the file and click **Open**. This uploads the file to **NGSP**.
- Click on the **Simulate** button in the pop-up window.



NGSP – Batch Upload

The file is uploaded and is available in the [Batch Upload screen](#).

Status

Batch ID and name

Id	File Name	Status	Total	Success	Failed	Created At	Created By	Updated At	Updated By	Action
1277	NGSP BATCH TEST...	Completed	15	0	15	2022-11-29 17:45:55	s.weetro@hotmail.com	2022-11-29 17:48:35	s.weetro@hotmail.com	Results
1276	NGSP BATCH TEST...	Simulation	15	13	2	2022-11-29 17:33:43	s.weetro@hotmail.com	2022-11-29 17:35:53	s.weetro@hotmail.com	Submit Results
1234	NGSP BATCH TEST...	Simulation	15	0	15	2022-11-23 08:47:48	s.weetro@hotmail.com	2022-11-23 08:48:13	s.weetro@hotmail.com	Submit Results
1229	NGSP BATCH TEST...	Simulation	15	0	15	2022-11-22 16:33:54	s.weetro@hotmail.com	2022-11-22 16:34:18	s.weetro@hotmail.com	Submit Results
1228	NGSP BATCH TEST...	Simulation	15	0	15	2022-11-22 16:11:18	s.weetro@hotmail.com	2022-11-22 16:11:55	s.weetro@hotmail.com	Submit Results

Number of lines processed, and how many have succeeded or failed

Action to take, **Submit** or **Results**

i We recommend clicking on the ID number to view the simulation results or clicking on **Results** to download the simulation results before clicking on **Submit**.

You can download the file uploaded by clicking on its name.

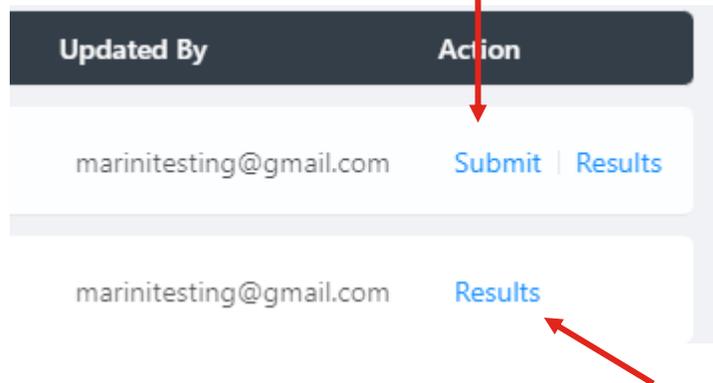
NGSP – Batch Upload

When you open the Results file, you will see that it is in a **Master Template format**.

The first column, **Error Message**, will display all error messages or warnings for any records that failed to process correctly.

If you need to make any corrections to your file, you will need to upload your corrected template and run Simulation again.

Once you are satisfied with your file, click on **Submit**.



If you have already clicked with on **Submit**, you can click on **Results** to export generated **Cases and Work Order numbers**.

	A	B	C	D
1	Download Work Order Data			
2				
3	Error Message	No.	Case Number	Work Order Number
4	Request failed. Please try again.	4	2000991143	
5				
6		8	2000991140	4002660501
9	A duplicate submission Request failed.	14	2000991146	4002660503
10	Please try again. Request failed.	15	2000991144	
11	Please try again. A duplicate	16	2000991149	
		..	-----	-----

NGSP Batch Upload – *Finish Repair*

Once you have repaired your customer's machines, you must select **Finish Repair** to complete the Work Order. There are two options:

OPTION 1

You can complete each Work Order **individually** (one at a time) by opening the Work Order screen. Click on the specific WO to open it, **ensure the Repair Notes field is completed**, and then click **Finish Repair** to mark it as **Completed**.

The screenshot shows the NGSP interface. The left sidebar has 'Service Management' expanded, with 'Work Order' highlighted. The main area shows a 'Work Order' form with fields for Work Order Number, Case Number, Location, Serial Number, and Work Order Status. Below the form is a table of work orders. The table has columns: Work Order Number, Location, Case Number, Serial Number, Work Order Type, Actual Service Level, Actual Service Type, and Work Order Status. The table contains three rows of data.

Work Order Number	Location	Case Number	Serial Number	Work Order Type	Actual Service Level	Actual Service Type	Work Order Status
4005190747	1210181008 - Sound Microsystems	2001517178	PC1FKDJ5	CRU	Next Business Day	ADVANCE EXCHANGE	Awaiting Order Release
4005190749	1210181008 - Sound Microsystems	2001517180	PC1FKDJ4	Onsite	Next Business Day	BRING IN	Order Accepted
4005191211	1210181008 - Sound Microsystems	2001518132	PC1FY4VK	AWSP	Next Business Day	BRING IN	Review for Billing

Work Order Status

The screenshot shows the 'Work Order Status' page. It displays 'Case Info' with 'WO: 4005117953 In Repair'. Below this, it shows 'WO 4005117953' and 'this is case title2022_10_12_10_30_06'. A progress bar shows 'In Repair' as the current status, followed by 'Parts Delivered'.

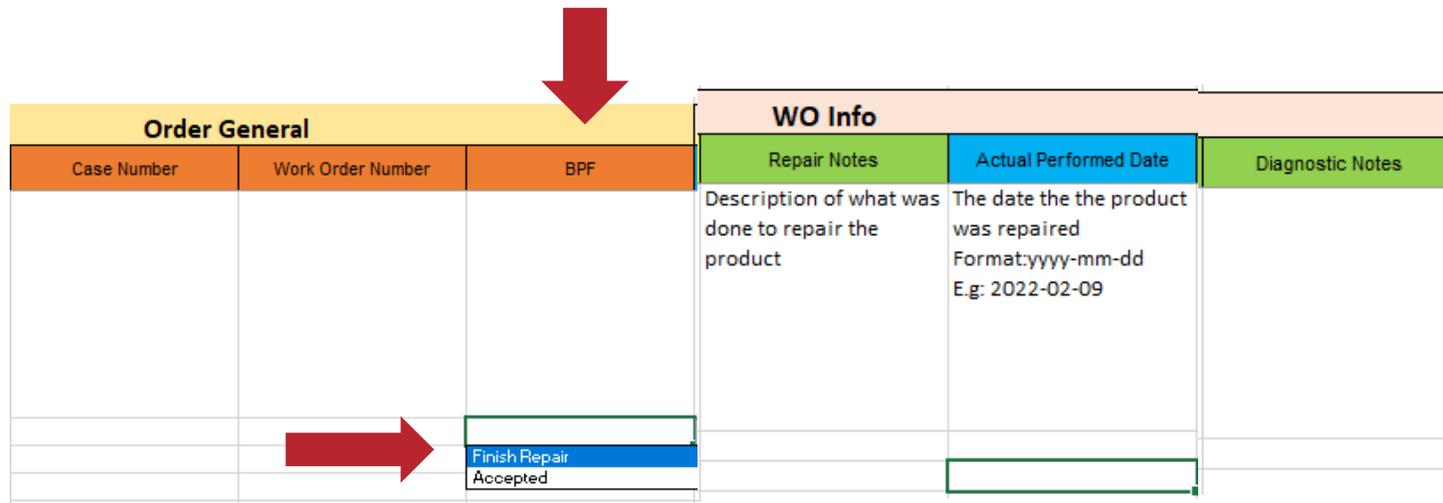
Action to take

The screenshot shows the bottom of the 'Work Order Status' page. It features two buttons: 'Previous' and 'Finish Repair'. A red arrow points to the 'Finish Repair' button.

NGSP Batch Work Order – *Finish Repair*

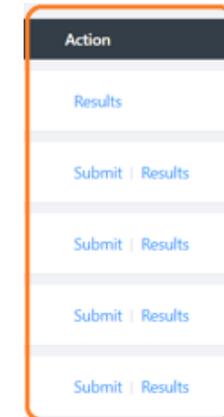
OPTION 2

- You can do it by **batch**, downloading a **new Batch Template**. For each Work Order you want to complete, fill out the following columns: **Work Order Number**, **Repair Notes**, and select **Finish Repair** in the BPF column.



Order General			WO Info		
Case Number	Work Order Number	BPF	Repair Notes	Actual Performed Date	Diagnostic Notes
			Description of what was done to repair the product	The date the the product was repaired Format:yyyy-mm-dd E.g: 2022-02-09	
		Finish Repair			
		Accepted			

- After completing these columns for each WO, you can upload the file and in the *Batch Upload* screen under **Action** click on **Submit**



NGSP – Report Management

- There is a section on the left-hand side menu called **Report Management** where you can find all reports available for download.

There, you will see three tabs:

My Watched: this is the default tab, and initially the list is empty. You can fill it with reports you wish to monitor by clicking on the star next to the report name in the **All** tab.

All: This tab contains all available reports. If you click on the star next to a report, it will be added to the My Watched tab.

Settings: This tab contains the ECA Determination report and the Performance report.

If you select the 3-dot ellipsis under the **action** column of a report, a few actions appear in a menu.

They are:

- [View Setup](#) (where available)
- [View Report](#)

The screenshot shows the NGSP Report Management interface. On the left, a sidebar menu has 'Report Management' highlighted with a red arrow. The main content area has three tabs: 'My Watched', 'All', and 'Settings', with 'All' selected. Below the tabs are search filters for 'Report Name' and 'Source Table'. A table lists reports with columns for Report Name, Source Table, Visualization Type, and Action. The 'Report Name' and 'Action' columns are highlighted with orange boxes. A red arrow points to the 'Action' column's 3-dot menu.

Report Name	Source Table	Visualization Type	Action
☆ All in One Report	WorkOrder	DATA	...
☆ WO Assigned by Lenovo in Last 7 Days	WorkOrder	STATISTICS	...
☆ Multiple Failures	ProductParts	DATA	...
☆ All in One Report	WorkOrder	DATA	...
☆ Rejected Return (wrong part or CID with no ADP)	ProductParts	DATA	...
☆ Daily Part Shipment	ProductParts	DATA	...

NGSP – Report Management – Customize & Export

- After clicking on [View Report](#), the report will open. You can customize the displayed columns by selecting options from the drop-down list

External Refe...	Work Order Cr...	Work Order Nu...	Pop Upgrade S...	WO Location Id	WO Location N...	Actual Perfor...	Completion Da...	Technician ID	Technician Na...	Pop Status	POP Rejected ...	Work Order St...
	2022-11-27 19:00:00	4005172553		1210100204-PSPD CompuCom CA	PSPD CompuCom CA			1210102385	ADAM.KOSTERIVA@COMPUCOM.COMTES rrrrriva	POP Submitted		Awaiting Order Release
	2022-11-27 19:00:00	4005172591		1210100204-PSPD CompuCom CA	PSPD CompuCom CA			1210102385	ADAM.KOSTERIVA@COMPUCOM.COMTES rrrrriva	POP Required		Awaiting Order Release

Lenovo NGSP

United States-Sound Microsystems

Success

Create Case

Notification (1)

Claim Awaiting POP.xlsx has been exported. [click here to download.](#)

Export

External Refe...	Work Order Cr...	Work Order Nu...	Pop Upgrade S...	WO Location Id	WO Location N...	Actual Perfor...	Completion Da...	Technician ID	Technician Na...
	2023-02-07 05:00:00	4005186745		1210181008	Sound Microsystems		2023-02-07 11:20:28	1210102385	ADAM.KOSTERIVA@COMPUCOM.COMTES rrrrriva
	2023-02-23 05:00:00	4005188899		1210181008	Sound Microsystems			8029468413	Guide US
	2023-02-23 05:00:00	4005188918		1210181008	Sound Microsystems			8029468413	Guide US
	2023-02-23 05:00:00	4005188921		1210181008	Sound Microsystems			8029468413	Guide US
	2023-02-14 05:00:00	4005187619		1210181008	Sound Microsystems			8029468413	Guide US

Claim Awaiting POP.xlsx

You can also export most of the reports, by clicking on the [Export](#) button.

Clicking this button prepares the report for export to a file, which will then be available for download.

A success message will appear.

Once the export is ready, the notification number will increase by 1. Open the notification to view the new alert regarding this report export

Use the [click here](#) link to download the report to your computer.

NGSP – Report Management – Claim Awaiting POP report

The **Claim Awaiting POP** report can be accessed from the **All** tab, or from the **My Watched** tab if you have favorited it.

This report displays all Work Orders where the POP Status field is marked as **POP Required**, **POP Submitted**, or **POP Rejected**.

It allows you to track all Work Orders where the Unit, Part, or Labor is **Out of Warranty**.

The screenshot shows the 'Report Management' interface in the NGSP system. The left sidebar contains navigation options like Dashboard, Service Management, Report Management (selected), System Management, Customer Management, Additional Links, and US & CA Links. The main content area shows the 'Report Management' page with tabs for 'My Watched', 'All', and 'Settings'. Below the tabs, there are input fields for 'Report Name' and 'Source Table'. A table below lists reports, with the 'Claim Awaiting POP' report highlighted. The 'Report Name' and 'View Report' button are circled in orange.

If the **POP Status** column displays **POP Rejected**, you may return to the Case (within 30 days) and resubmit a POP, ensuring that the concerns listed in the **POP Rejected Reason** column are addressed.

External Refe...	Work Order Cr...	Work Order Nu...	Pop Upgrade S...	WO Location Id	WO Location N...	Actual Perfor...	Completion Da...	Technician ID	Technician Na...	Pop Status	POP Rejected	Work Order St...
PC-42164	2022-11-29 05:00:00	4005172920	Rejected	1210181008	Sound Microsystems			1622702264	Jamie Oliver	POP Rejected	incomplete picture	Order Accepted

NGSP – Report Management – Daily Part Shipment report

- The **Daily Part Shipment** report can be accessed from the **All** tab, or from the **My Watched** tab if you have favorited it.
- **This report provides details on all Work Orders together with their Part line items, allowing you to view comprehensive Parts information..**
- This report serves as a replacement for the daily report that was previously sent via email.

i Once you click on **View Report**, you can customize it by selecting the information you wish to include from the drop-down list. The following columns may be of interest to you:

- ✓ Work Order Number
- ✓ Product Description
- ✓ Requested Part
- ✓ Dates (Shipment Date, Return by Date, Delivery dates, etc)
- ✓ Part Tier

- ✓ Returnable indicator
- ✓ Waybill numbers (Shipping and Return)
- ✓ Work Order Created by
- ✓ Technician id
- ✓ Return by date

Home / Report Management

Report Management

My Watched All Settings

Report Name: Source Table:

Columns

Report Name	Source Table	Visualization Type	Action
★ Claim Awaiting POP	WorkOrder	DATA	...
★ Payment Report	WorkOrder	DATA	...
★ Daily Part Shipment	ProductParts	DATA	...

Total: 3 < 1 > 10 / page

NGSP – Report Management – Payment Report

- The **Payment Report** can be accessed from the **All** tab, or from the **My Watched** tab if you have favorited it.
- This report provides details for all Work Orders in **Closed** status, regardless of whether payment has been processed.
- This report replaces the monthly report that was previously sent via email.

Report Management

My Watched All Settings

Report Name: Source Table:

Report Name	Source Table	Visualization Type	Action
★ Claim Awaiting POP	WorkOrder	DATA	View Report
★ Payment Report	WorkOrder	DATA	...
★ All in One Report	WorkOrder	DATA	...
★ Daily Part Shipment	ProductParts	DATA	...

Home / Report Management / Report Detail

Payment Report

Export

WO#: WO Creation Date Range: ~ External Reference Number:

Paid Date: ~

Search Clear All

Business Partner Number	External Reference Number	Case#	WO#	WO Create Date	Service Complete Date	Closed Date	Submitter Email	Submitter Name	Order Type	Actual Service Type	MTM
1210181008	2323	2001408181	4003029655	2023-03-12 00:01:01		2022-08-15 19:51:41	# NGSPUpdate_Dev-MsdSync	MsdSync	Labor Only	BRING IN	20Q1
1210181008	23112112	2001408181	4003029664	2022-10-20 07:07:03	2022-08-15 00:49:54	2022-10-21 05:09:56	# NGSPUpdate_Dev	MsdSync	Customer Limited Warranty	BRING IN	20Q1
1210181008	23112112	2001408181	4003029670	2022-10-24 15:20:00	2022-08-15 01:20:20	2022-10-25 13:29:20	# NGSPUpdate_Dev	MsdSync	DOA	BRING IN	20Q1

← You can **Export** it, by clicking on the **Export** button.

← You may use the **Search** options at the top to narrow down your search.

NGSP – Report Management – Payment Report (continue)

Columns of Interest

- Closed Date
- Actual Labor Amount
- Total Net
- Gross Total
- Paid Date
- Bank Confirmation No.

Payment processing begins on the **3rd of each month**, following the closing date of a Work Order. To check what should have been paid, **refer to the Closed Date column**. Payment amounts will be displayed once the Work Order has been approved for payment.

For **Canada**, taxes will appear under the respective columns (**Tax HST, Tax PST, Tax GST/VAT, Tax QST**) once the Work Order is approved for payment. The final amount will be listed under the **Gross Total** column.

For **US**, the final amount will be listed under the **Gross Total** column.

Scroll to the far right to view the **Paid Date** and **Bank Confirmation No.** columns. This information will be visible within the week following payment.

Business Partner Number	External Reference Number	Case#	WO#	WO Create Date	Service Complete Date	Closed Date	Submitter Email	Submitter Name	Order Type	Actual Service Type										
1210181008	1680058549.100534	2001522153	4005194232	2023-03-28 21:56:27	2023-03-28 21:56:16	2023-03-29 21:01:33	# NGSPUpdate_Dev-MsdSync	MsdSync	Accidental Damage Warranty	LABOR ONLY										
1210181008	1680058562.2976267	2001522154	4005194241	2023-03-28 21:56:27		2023-03-29 20:15:36	# NGSPUpdate_Dev-MsdSync	MsdSync	Options Claim	ADVANCE EXCHANGE										
1210181008	1680058599.5293894	2001522167	4005194245	2023-03-28 21:57:28	2023-03-28 21:57:04	2023-03-29 20:01:29	# NGSPUpdate_Dev-MsdSync	MsdSync	Machine DOA	LABOR ONLY										
1210181008	1680058600.9862297	2001522168	4005194246	2023-03-28 21:57:28	2023-03-28 21:57:09	2023-03-29 20:01:43	# NGSPUpdate_Dev-MsdSync	MsdSync	Offline Billing	LABOR ONLY										
1210181008	1680058648.986461	2001522169	4005194248	2023-03-28 21:58:27	2023-03-28 21:57:55	2023-03-29 20:01:31	# NC													
1210181008	1680058653.9224896	2001522170	4005194249	2023-03-29 22:02:05	2023-03-28 21:58:02	2023-03-29 20:01:45	# NC													
1210181008	1680058665.5338285	2001522172	4005194250	2023-03-28 21:58:27	2023-03-28 21:58:12	2023-03-29 20:01:40	# NC													

NGSP – Report Management – ECA Determination report

The **ECA Report** can be accessed from the **Settings** tab. This report allows you to look up all the ECA numbers.

The screenshot shows the 'Report Management' interface. At the top, there are tabs for 'My Watched', 'All', and 'Settings' (which is highlighted with an orange box). Below the tabs, there are input fields for 'Report Name' and 'Source Table', along with a 'Filters' dropdown and a 'Search' button. A table below lists reports with columns for 'Report Name', 'Source Table', 'Visualization Type', and 'Action'. The 'ECA Determination' report is highlighted in blue, and its 'Action' column contains a 'View Report' button (also highlighted with an orange box).

Report Name	Source Table	Visualization Type	Action
PPF Report	PPF Report	DATA	View Report
ECA Determination	ECA Determination	DATA	View Report

The screenshot shows the 'ECA Determination' search interface. It features several input fields: 'ECA Number', 'MT', 'MTM', 'Effective Date' (with 'Start date' and 'End date' sub-fields), 'Labor Only' (a dropdown menu), and 'Part Number'. A red arrow points from the 'Labor Only' dropdown to a search filter menu. The search filter menu includes a '+ 2...' button, a 'Search' button, and a 'Clear All' button. Below the search fields is a table with the following data:

ECA Number	MT	MTM	Effective Start	Effective End	Labor Only	Part Number	Replacement Part
500		20L3000KBM	2021-12-25	9999-12-30	Y		

You can search by

- ECA Number
- Machine Type (MT)
- Machine Type Model (MTM)
- Effective Date
- or you can add more filters from the drop-down menu.

NGSP – Report Management – ECA Determination report (continue)

- You can use the “Order by” icon to arrange the table by values in that column.
- You can also use the magnifying glass icon to filter by values in a column.
- At the bottom of the page, you can select which page of the report you wish to see.

ECA Number	MT	MTM	Effective Start	Effective End	Labor Only	Part Number	Replacement Part
500		20Q1CTO1WW	2021-12-25	9999-12-30	Y		
700			2021-12-25	9999-12-30	Y		
800			2022-01-03	9999-12-30	N		00NY399

Total: 1891 < 1 2 3 4 5 ... 19 > 100 / page

i If you would like to find out more details about the ECA selected, copy the number. You can then click on the links in the [Navigation Menu](#) to access the Support pages for further information.

Lenovo NGSP

- Dashboard
- Service Management
- Report Management**
- System Management
- Customer Management
- Additional Links
- US & CA Links**
 - Canada Support
 - US Support

Home / Report Management / Report Detail

ECA Determination

ECA Number	MT	MTM
500		20L3000K
700		10S7CTO
800		10S7CTO
100		
600		

NGSP – Return Merchandise Authorization (RMA)

If you have ordered a **Returnable part**, you can view parts pending Return in the **RMA** report within **Service Management**.

ⓘ No action is required here; this report is simply for you to quickly check if you still need to return a part to Lenovo.

Bear in mind you have **30 days to return parts back to Lenovo**. If you **require a return extension or a new return label**, please contact the **SMSC (smc@lenovo.com)**.

The screenshot shows the RMA report interface. On the left is a navigation menu with the following items: Dashboard, Service Management (expanded), Case, Work Order, RMA (highlighted), Cases & Work Orders, Service History, Batch Upload, and Entitlement Check. The main content area is titled 'RMA' and contains two input fields: 'Work Order Number:' and 'Part Number:'. Below these is a table with the following columns: Work Order Number, Part Number, Returnable Flag, Days To Return, and Return Completed Date. The table contains one row with the following data: Work Order Number: 4005188012, Part Number: 01HW028, Returnable Flag: Yes, Days To Return: 3, and Return Completed Date: Select date. A 'Return' button is located below the table.

<input type="checkbox"/>	Work Order Number	Part Number	Returnable Flag	Days To Return	Return Completed Date
<input type="checkbox"/>	4005188012	01HW028	Yes	3	Select date

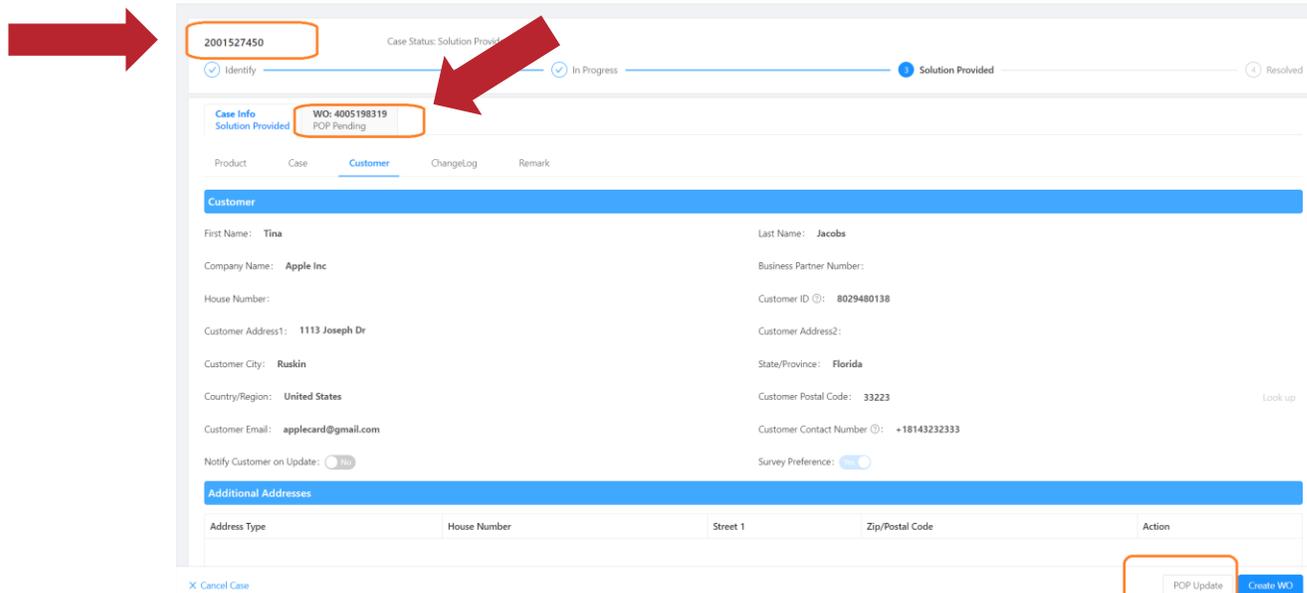
NGSP – Uploading Proof of Purchase (POP)

If you have submitted a Work Order for a unit that is **no longer under warranty**, system will display a **POP required** message.

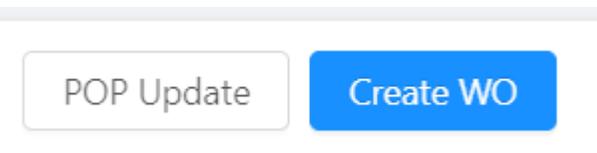


i If your unit's entitlement shows expired in our system but you have a POP to validate that your unit is under warranty **we recommend** reaching out to our **Registration teams** thinkpls_us@lenovo.com or thinkpls_ca@lenovo.com to correct entitlement records before creating the **Case and/or Work order**.

If you have already created the **Work Order**, please go to the **Case** and click on **POP Update** to upload your file.

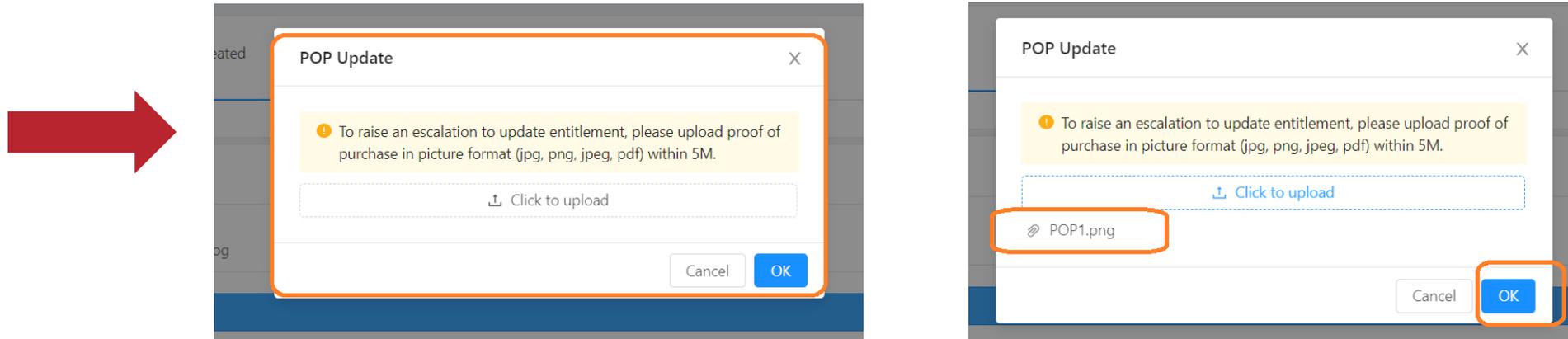


i The POP no longer needs to be sent to the SMSC via email for its approval; it is now uploaded directly in the case

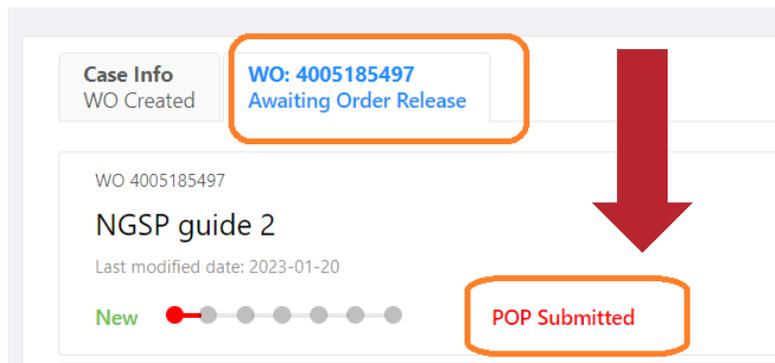


NGSP – Uploading Proof of Purchase (POP) - continue

A popup screen will appear, click on “Click to upload” to add your POP. Once it has been uploaded, click on **OK**.



To verify that it has been uploaded successfully, go back to the **Work Order** and check the status of the **POP**. It should read **POP Submitted**



ⓘ Orders that require a POP will remain in “Awaiting Order release” status. Once an SMSC agent reviews and approves the uploaded POP, the unit’s entitlement information will be updated. You will then receive an email notifying you that you can dispatch your order to receive the parts.

NGSP – Uploading Proof of Purchase (POP) - continue

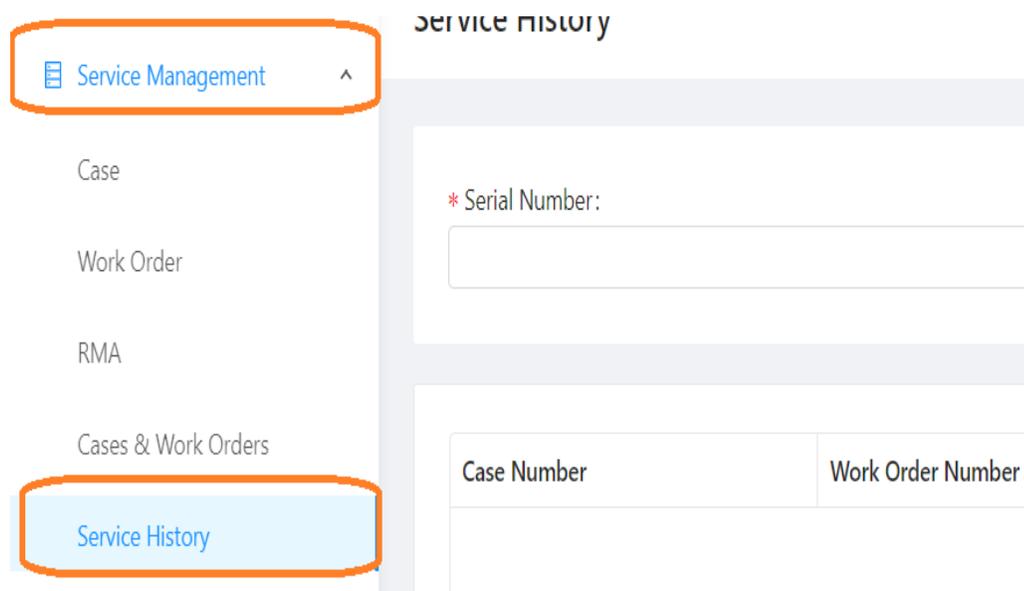
i You can monitor all Work Orders that require a **POP** by viewing the *Claim Awaiting POP* report within Report Management.

The screenshot shows the 'Report Management' page in the Lenovo NGSP system. The left sidebar contains a navigation menu with 'Report Management' highlighted. The main content area shows a table of reports. The 'Claim Awaiting POP' report is highlighted, and its 'View Report' button is circled in orange.

Report Name	Source Table	Visualization Type	Action
☆ All in One Report	WorkOrder	DATA	...
☆ WO Assigned by Lenovo in Last 7 Days	WorkOrder	STATISTICS	...
☆ Multiple Failures	ProductParts	DATA	...
☆ Open WOs by Status	WorkOrder	STATISTICS	...
☆ WO Count in the Last 7 Days	WorkOrder	STATISTICS	...
☆ Rejected Return (wrong part or CID with no ADP)	ProductParts	DATA	...
☆ Daily Part Shipment	ProductParts	DATA	...
☆ Open WOs	WorkOrder	DATA	...
☆ Claim Awaiting POP	WorkOrder	DATA	View Set Up View Report ...
☆ Payment Report	WorkOrder	DATA	...

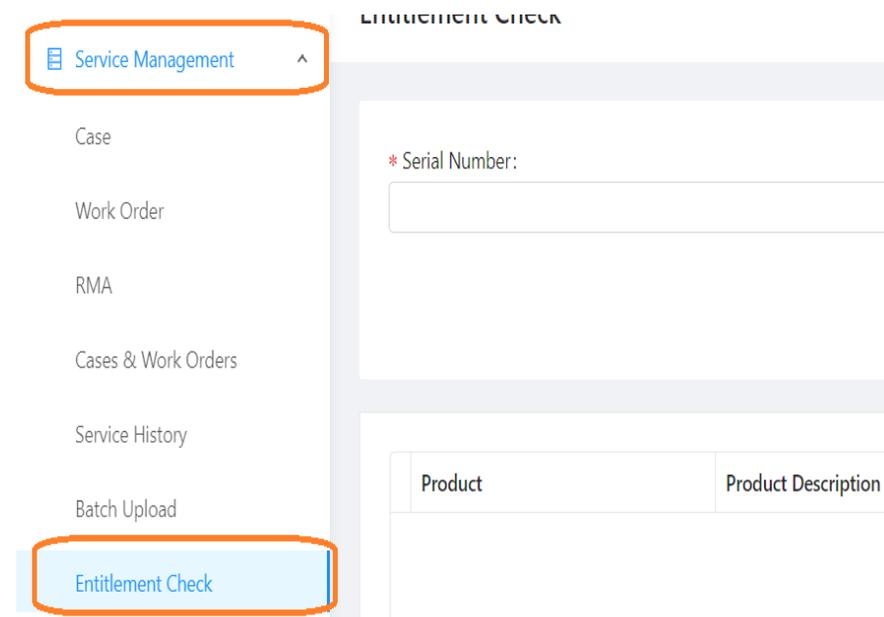
NGSP – Service History & Entitlement Check Queries

a. The **Service History** section provides a quick way for you to view the Service History for any Serial Number or MTM.



b. The **Entitlement Check** section provides a quick way for you to view the entitlement (authorization) for any Serial Number or MTM.

After running entitlement check, you can click on Create Case to continue working.



NGSP – Additional Support

- **Service Management Support Center – SMSC**

Provides administrative support to North American Self-Maintainers and Service Providers enrolled in the Authorized Warranty Service Provider Program.

Their website offers detailed operational procedures, tutorials, videos, and service guides for non-technical issues.

Contact information:

Email: smc@lenovo.com

Phone: 800 426 3391

Website: <https://smc.lenovo.com/>

ⓘ To have access to the SMSC website, each AWSP location must use its unique Lenovo ID. If you haven't created one yet, please contact the SMSC.

- **Dedicated Service Consultants**

Brenda Parker (bparker@lenovo.com)

Charles Coryell (ccoryell@lenovo.com)

Daniela D Georgescu (dgeorges@lenovo.com)

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ⓘ If you are unsure which Service Consultant is assigned to your location, please reach out to the SMSC.



**Smarter
technology
for all**

Lenovo

thanks.