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Transforming the way you work

Self Service Support Portal

USER GUIDE

V0.4 18/12/2017

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Document Purpose:
This document is a guide for Civica customers using the Civica Self Service Support Portal.

Document Version Control:

VERSION	AUTHOR	DATE	DESCRIPTION	CHANGE	STATUS
V0.1	Ian Woodward	5/05/2017	Creation of initial document		Started
V0.3	Reece Burns	11/12/17	Update document, addition of feedback section		
V0.4	Sarah Gauci	18/12/17	Further updates		
V0.5	David Thomson	5/01/2018	Further updates	Removal unsupported older MS browser versions	

Objectives:

- To allow Civica customers to understand how to use the Self Service aspect of the Service Desk Management System

Contents

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Screen Images

Screen images used throughout this User Guide have been taken from the Civica Training System. They are provided to help you recognise the part of the Service Desk you are using. Because the system has been set up specifically for you organisation, the screen details you see may differ.

Browser Support

The Self Service Support Portal is an application for end-users that provides access to the Service Desk database through a support browser.

Supported Web Browsers

Caution: For the best performance, security and user experience we strongly recommend that you upgrade to the latest browser versions.

Supported Browsers:

- Microsoft Internet Explorer 10 or 11
- Mozilla Firefox
- Apple Safari
- Google Chrome

Earliest Supported Mobile Devices

The earliest supported Mobile Devices are:

- Android 4.1.2
- Blackberry 10.1
- IOS7
- Windows Phone 8

Keyboard Shortcuts

In the Self Service Support Portal, you can use the keyboard to navigate your way around the user interface. There are a number of shortcuts that have been created for frequently used tasks.

KEYSTROKE	DESCRIPTION
ENTER (When viewing Query Results)	Opens the selected Item
ENTER (In a text entry field)	Starts a new line
ENTER (If the button has focus)	Performs the button’s function
ENTER (In the Actions Panel)	Displays the appropriate window
ENTER (If a drop down list is expanded)	Selects the highlighted item
ENTER (Anywhere not mentioned above)	Will Save and Close the window
SPACEBAR	If you are viewing Query Results anywhere within the application, pressing the spacebar opens the selected item
ARROW KEYS	If a drop down list has focus, displays the contents of the drop down and enables you to move around the drop down.
HOME	Displays the first page of a paged list
END	Displays the final page of a paged list
PAGE UP	Displays the previous page of a paged list
PAGE DOWN	Displays the following page of a paged list
ESCAPE	Cancels the current page
CTRL+Up or Down	In the Shortcut Bar, displays the previous or next shortcut groups
TAB	Once you have focus on a Collections Tab, you can use the TAB key to change focus
F8	On a drop down list, pressing F8 displays the values of the list
CTRL+ALT+B	If you are viewing a process form, changes the focus to the Actions Section
CTRL+ALT+G	If you are viewing a process form, changes the focus to the Collections Tabs
CTRL+ALT+H	Displays the Home Page
CTRL+ALT+D	Changes the focus to the Documents Area
CTRL+ALT+L	Changes the focus to the Results List
CTRL+ALT+W	Changes the focus to the Shortcut Bar
CTRL+ALT+F	Changes the focus to the Search Bar
CTRL+G	In the drop down list, changes focus to the Go To Page control
CTRL+P	Displays the Print dialogue box

Logging into the Self Service Portal

Before we can use the Self Service Portal we need to log in using the **Self Service Login Page**

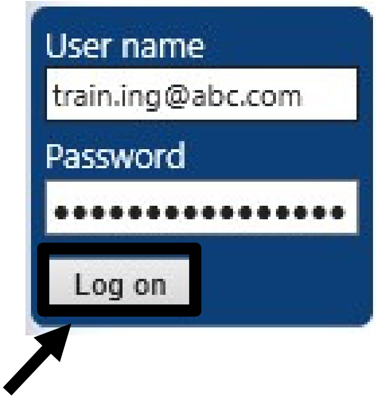
To Start Self Service

1. Start a suitable Web Browser and open:

https://servicedesk.civica.co.uk/selfservice/ss

The **Self Service Login Page** displays similar to the example below

2. Type in your **User Name** and **Password** in the appropriate fields similar to the example below



3. Click the **Log on** button

4. The **Self Service Home Page** will display

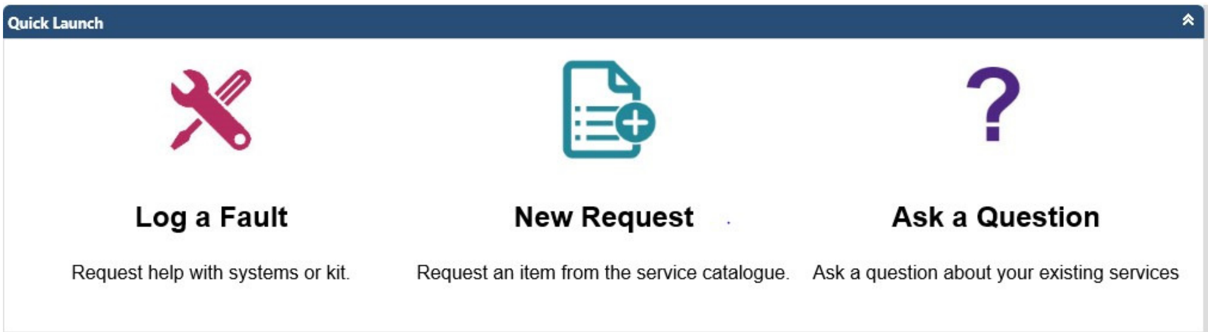
Basic Navigation

Now that you have logged in you are presented with the **Default Self Service Dashboard**, which is populated with various functional / informative windows. Each of these windows are described in the following sections.

The Quick Launch Section

The **Quick Launch Section** enables quick access to:

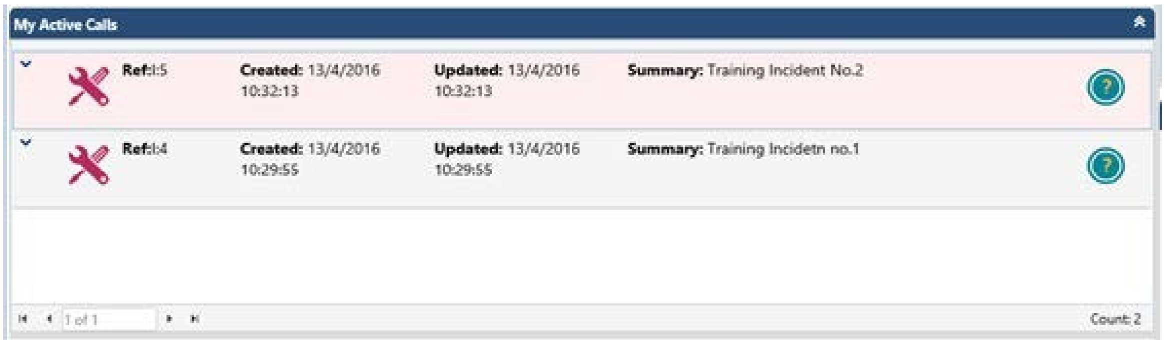
- **Log a new fault –** record a new fault on the system for the Civica Analysts to attend to
- **Make a request –** takes you to a service catalogue. The service catalogue will be built up over time allowing you to request a large range of items, for instance:
    - Software Enhancements
    - Consultancy Days
    - Delivery of New Services
- **Ask a Question –** takes you to a screen where you can enter your query, this will direct your query through the Service Desk



The My Active Calls Window

The **My Active Calls** section shows a summary of your open Incidents and Problems **(My Active Calls)** in a window just below. All of your active faults are ordered by the **Updated** field with the last updated record being at the top.

Note: This section will be empty if there are no outstanding tickets.



Each row in the **My Active Calls** section displays:

- An icon on the left depicting if the issue is being treated as an Incident or a Problem (This is ITIL terminology – *see* ***Appendix A: ITIL Definitions***)

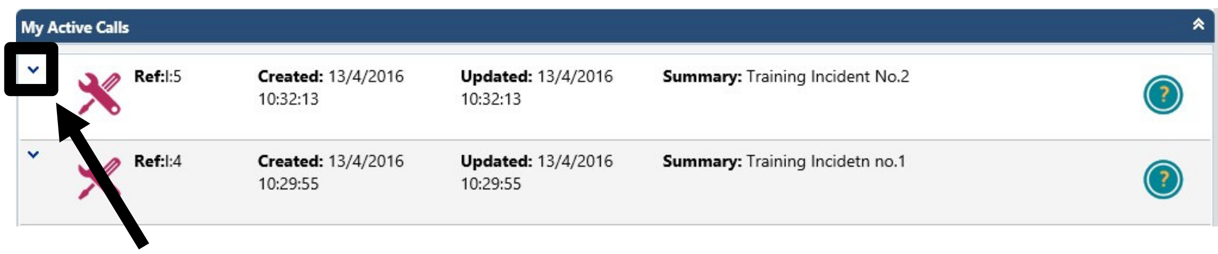

Is an Incident


Is a Problem

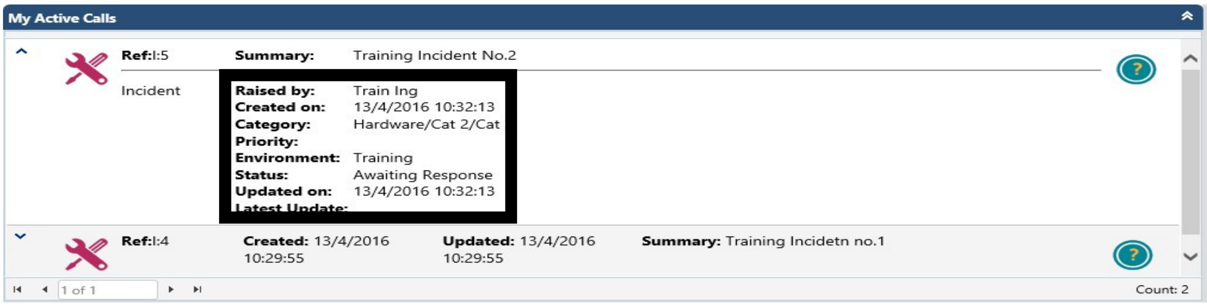
- The Reference number of the fault (Incidents begin with **I** and Problems begin with **P**)
- The created Date & Time showing when the fault was first registered on the system
- The Updated Date & Time showing when the fault was last updated by either yourself or a Civica Analyst
- A Summary of the Incident or Problem
- An icon on the right depicting the status of the fault. This represents where in the process the fault currently is (See ***Appendix B – Process Stages and Icons***)

Expanding the View:

It is possible to expand and shrink the amount of information displayed on a row by clicking the small chevron on the left side of the row.



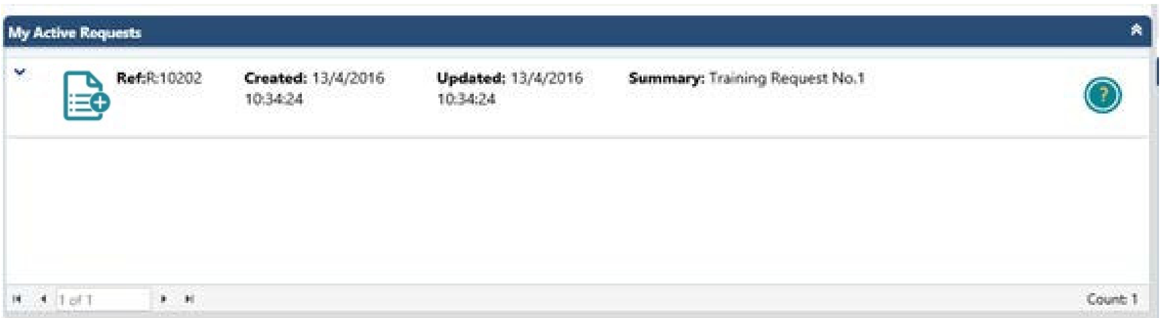
1. Click the small chevron on the left of the fault you wish to expand
2. The hidden information will now display for that fault similar to the example below



The My Active Requests Window

The **My Active Requests** section shows a summary of your open Requests. All of your active requests are displayed, ordered by the **Updated** field with the last updated record being at the top.

Note: This section will be empty if there are no outstanding tickets.

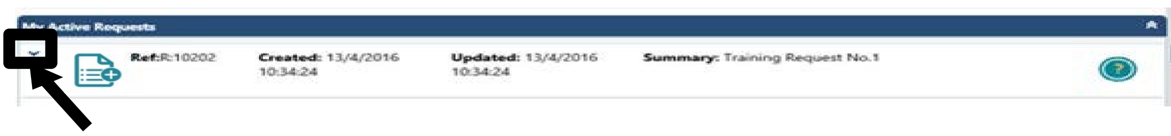


Each row in the **My Active Calls** section displays:

- An icon on the left depicting that this is a Request (This is ITIL terminology – *see **Appendix A: ITIL Definitions***)
- The Reference number of the request
- The Created Date & Time showing when the fault was first registered on the system
- The Updated Date & Time showing when the fault was last updated
- A Summary of the Request
- An icon on the right depicting the status of the request. This represents where in the process the fault currently is (See ***Appendix B – Process Stages and Icons***)

Expanding the View:

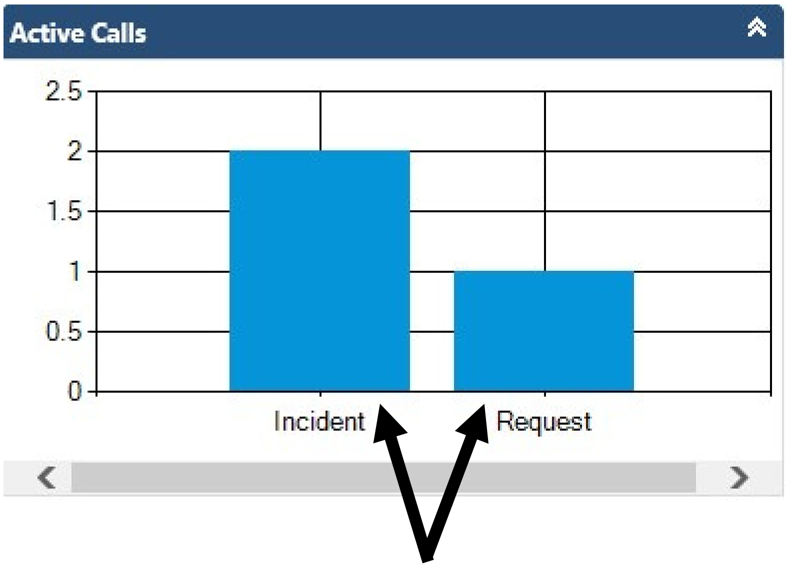
As described within the My Active Calls section, it is possible to expand and shrink the amount of information displayed on a row by clicking the small chevron on the left side of the row.



1. Click the small chevron on the left of the fault you wish to expand
2. The hidden additional information will now display

Active Calls Window

The **Active Calls** window show a graph depicting how many Incidents and Problems are currently active



You can view a list of the Incidents or Requests by clicking on the appropriate graph bar In the example below the Incident bar has been clicked and the Process List showing the active Incidents has been displayed. You can open any Incident on the list by clicking on it.

Process List

Ref	User Name	Location Location	Customer Ref	Summary	Service Service	Cat Level 1	Cat Level 2	Cat Level 3	Environment Environment	Priority	Creation Date
I:5	Train Ing		Train02	Training Incident No.2	LANDesk Training Service	Hardware	Cat 2	Cat 3	Training		13/4/2016 10:32:13
I:4	Train Ing		Train01	Training Incidetn no.1	LANDesk Training Service	Software	Cat 2	Cat 3	Training		13/4/2016 10:29:55

1 of 1

In the example below the Request bar has been clicked and the Process List showing any active Requests has been displayed. You can open any Request by clicking on it.

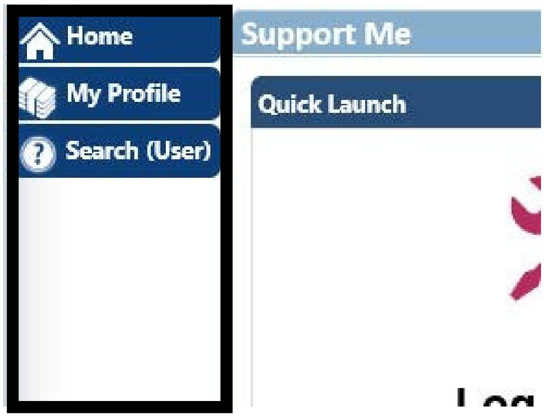
Process List

Ref	User Name	Location Location	Customer Ref	Summary	Service Service	Cat Level 1	Cat Level 2	Cat Level 3	Environment Environment	Priority	Creation Date
R:10202	Train Ing		Request01	Training Request No.1	LANDesk Training Service						13/4/2016 10:34:24

1 of 1

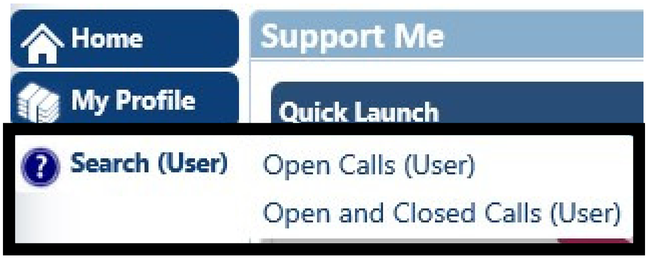
The Self Service Navigation Bar

The **Navigation Bar** on the left side provides access to the different areas of Self Service that you have access to.

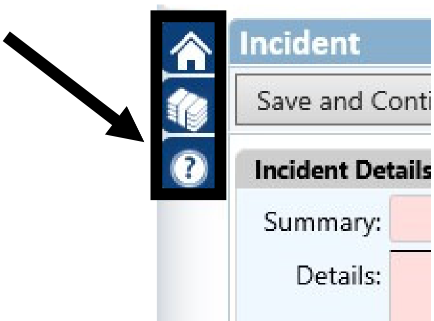


Note: *The areas you have access to is determined by your role and the rights associated with that role, therefore some people will have more options than others*

The entries that are in each shortcut group appear when you hold the mouse over them. The shortcut groups themselves can also be associated with several links (additional options) that expand on the right
In the example below the mouse has been held over the **Search** shortcut group and the entries have displayed next to it



When you click a link that displays an entry form or document (such as Log a Fault), the **Navigation Bar** becomes narrower, displaying only the group icons allowing more space for the window you are using



Logging a Fault (Incident)

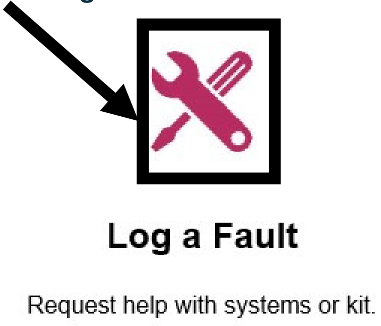
Incidents are events that are not part of the standard operation of a service, which compromise, or potentially compromise, the quality of that service.
Incident management is about restoring the standard operation of a service to you, the customer, as quickly as possible within agreed timescales.

A high level diagram of the Incident process is contained in **Appendix B**.

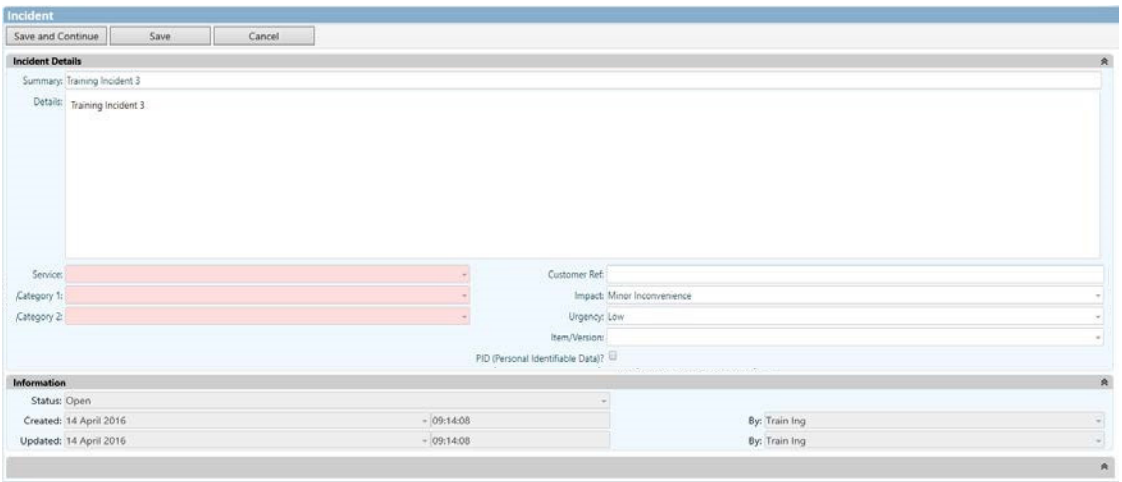
Logging a Fault (Incident)

When you log a new fault it is really important to include as much details as possible. This enables our Analysts to assess the impact and deal with the Incident in a more accurate, timely and effective manner.

1. From the home screen, click **Log a Fault**

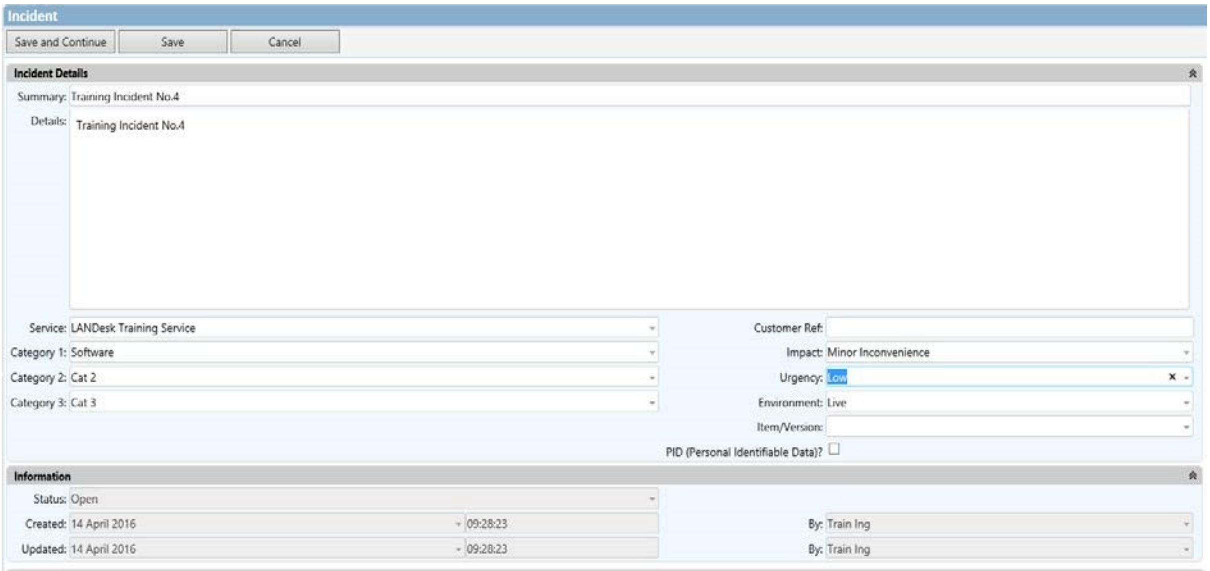


The **Incident** screen will now display, here you are presented with a number of fields. You will need to complete all of the mandatory fields (shaded in pink) before you can save the ticket (See **Understanding the Incident Details Attribute Fields on page 16**)



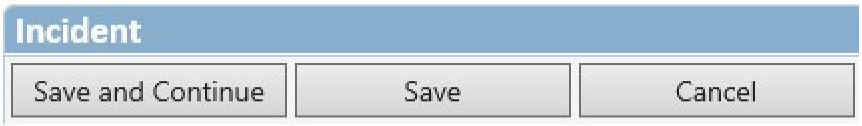
If you forget to fill in all of the mandatory fields and then try to save the call an error message will display across the top of the screen. In the example above, the mandatory fields ‘**Service, Category 1**’ and ‘**Category 2**’ were not completed before an attempt to save the call was made.

To clear the error message simply click the **'X'** on the right hand side. You will then be able to complete the missing mandatory information before saving the call.
An example of a fully completed Incident is shown below, please note that all of the fields are now white showing that all of the mandatory information has been completed.

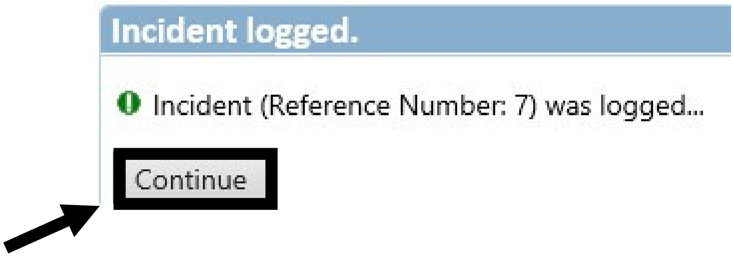


Saving the Details

Once you have entered all of the details and selected all of the relevant Categories, you have three options at the top of the screen



Save and Continue – This will save the Incident and on the next screen will inform you of the Reference Number similar to the example below



Clicking Continue will then take you to the **Default Service Desk Dashboard** (Home Page)

Save – This will save the Incident and leave you on this screen so that you can **Add an Attachment** or a **Customer Note.** You will be able to see your Reference Number at the top

Cancel – This will return you to the **Default Service Desk Dashboard** (Home Page) without recording the Incident

Note: *On occasion these buttons are hidden by an error message, for instance because you have previously tried to save the Incident before completing all of the mandatory fields as shown earlier. Simply click the '**X**' on the right of the message to close it.*

Understanding the Incident Details Attribute Fields

The Incident Details window may contain any of the following attributes:

(M) = Mandatory Field

Summary (M)	A brief outline of the issue
Details (M)	A detailed explanation of the issue. You should provide as much information as possible to help the Civica Analyst resolve the issue quickly and effectively
Service (M)	The service you are raising the issue against. The service acts like a top level category that will filter items that are relevant to your organisation and route your issues to the appropriate Business Unit within Civica
Categories (M)	Categories enable you to pinpoint your issue into preconfigured types so that we can manage the Incident more effectively. For example, an IT service desk may have the Categories **Hardware, Software** and **Infrastructure**. These categories describe the nature of the support requirement, and enable the service desk to assign Incidents to the Analyst, Group or Role that is best equipped to deal with a particular type of issue. **Category 3** is driven by the selection of **Category 2** and may not be required.
Impact (M)	A combination of Impact and Urgency are used to determine the priority of your issue. The timescales for resolving issues will be defined by the SLA's within your contract. The Impact options are: **Minor Inconvenience –** The Impact of the issue is minor and doesn't impact on your time. For instance, screen layouts are wrong or a spare laptop isn't working **Affecting Performance –** This issue is slowing down your daily activity. For instance, a software module is going slow, or a printer isn't working meaning you have to use a printer in a different room **Serious Impact on Performance –** several people in your organisation are affected by this issue and it affecting their ability to work efficiently **Service Totally Unavailable –** This issue is affecting everyone who uses the software or hardware. For instance, a software product won't allow anyone to log in. Or a network is down affecting the whole organisation.
Urgency (M)	This is used to describe how quickly you need the problem resolving. The Urgency options are: **High –** You require the issue dealt with as quickly as possible to meet deadlines **Medium –** This needs to be dealt with within reasonable timescales **Low –** This issue is not urgent

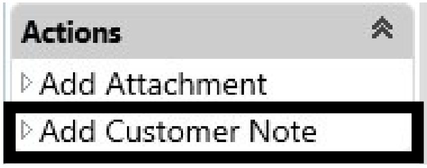
Customer Ref	This field is for you to record your own unique reference number against the call. This may be the number of a related call in your own service management tool.
Clinical Safety Checkbox	Trigger to enable the Clinical Safety text field to appear (This is only available for Health & Social Care Paris customers)
Environment	The Environment field is used to identify the system you are experiencing the fault on. For instance Test or Live (This is only available when certain Categories have been selected)
Item / Version	This field is used to identify a specific piece of hardware or the version of software you are using (This is only available when certain categories have been selected)

Adding Notes to an Incident

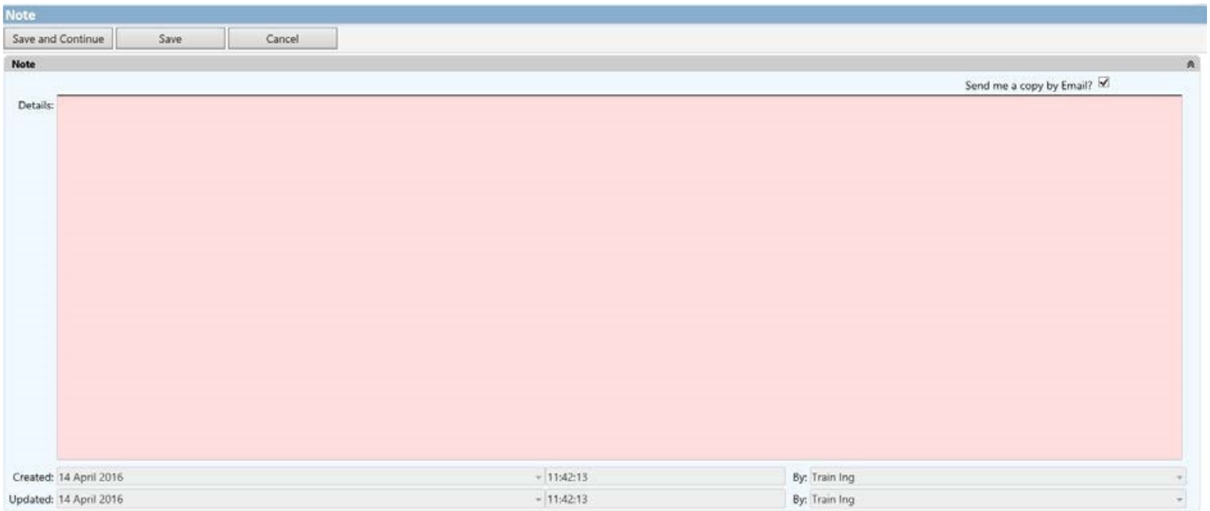
Both Customers and Civica Analysts can add Notes (called Customer Notes) to an Incident to help record useful information as the Incident progresses.

For instance, a Civica Analyst may require further information on an issue that has been logged. A copy of this request for information will be recorded in the Customer Notes. You can then use the **Add Customer Note** action on the Incident Screen to send your reply.

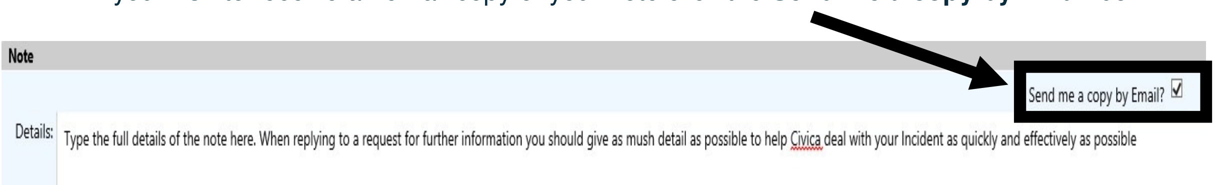
1. From the **Incident** screen click on **Add Customer Note** in the **Actions** section



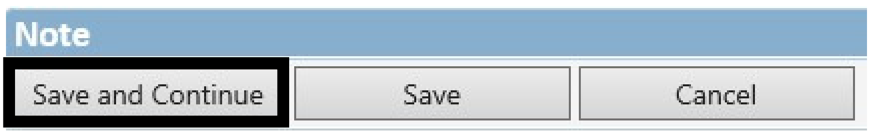
The **Note** screen will display similar to the example below



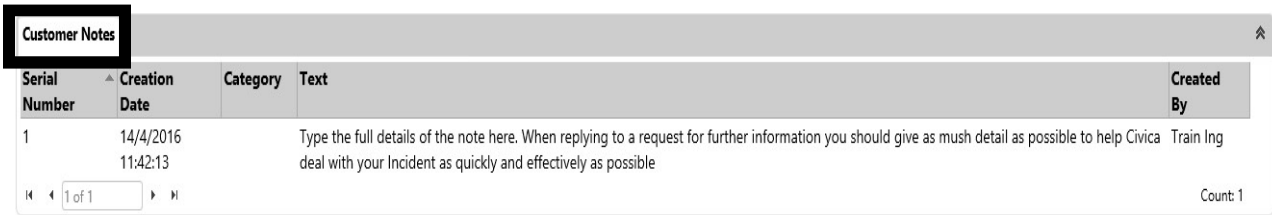
2. In the **Details** field type the contents of your note. If you are replying to a request for information you should give as much detail as possible.
   If you wish to receive an email copy of your note click the **Send me a copy by Email** box



3. Click the **Save and Continue** button to save the Note and to return to the **Incident** screen.



A **Customer Notes** Tab will appear at the bottom of Incident Window. Clicking on this Tab will show all of the Customer Notes relating to this Incident. To open a Note simply click on it

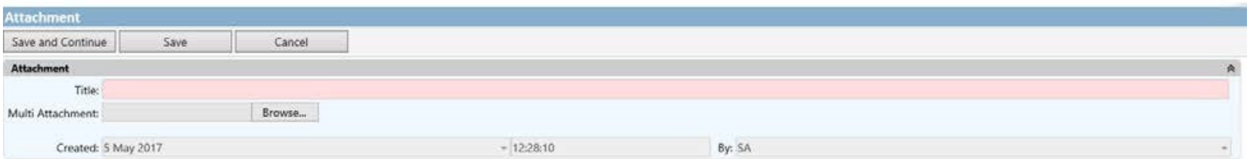


Attaching Documents to an Incident

You can add any type of attachment, such as a spreadsheet, text document or image field. You can attach any number of documents to a single Incident, however each attachment must be less than 5mb, and if you try to upload a file larger than 5mb you will receive an error message.

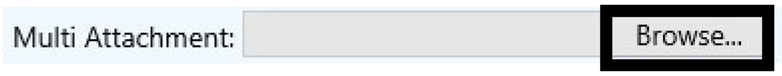
1. From the **Incident** screen click on **Add Attachment** in the **Actions** section

The **Attachment** screen will display similar to the example below

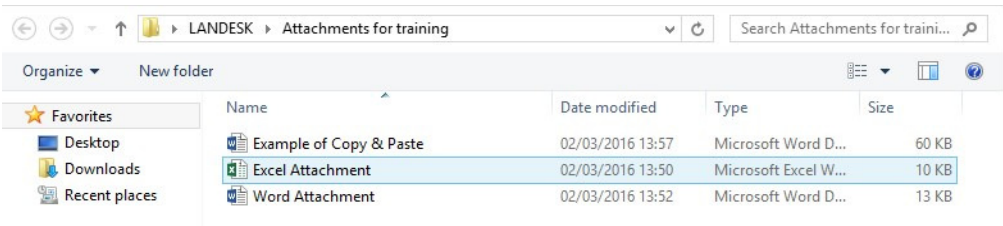


2. In the **Title** field type in a meaningful summary of the attachment

3. Click the **Browse** button

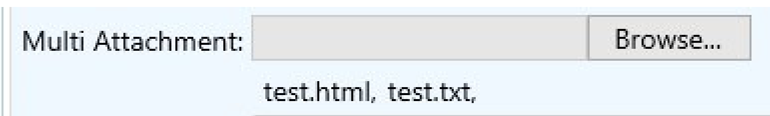


4. Now browse to the location of where the required attachment has been saved



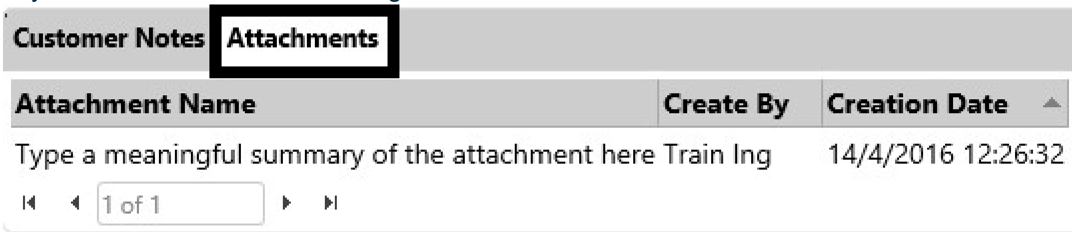
***Note**: You can select more than one attachment at a time*

Once you have selected the required attachments they will display in the **Multi Attachment** field similar to the example below



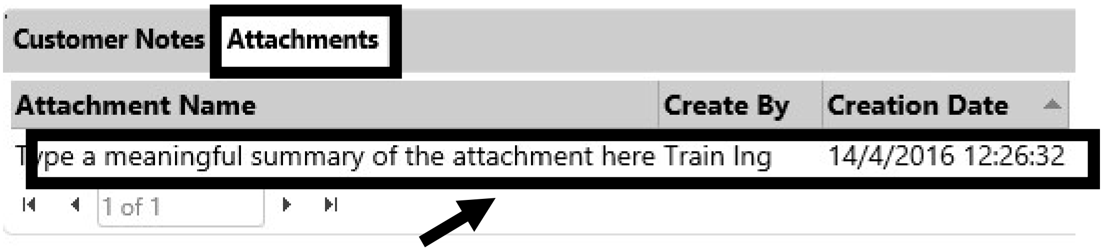
5. Click **Save and Continue**

An **Attachments** Tab will appear at the bottom of the Incident window. Clicking on the Tab will display all of the Attachments relating to this Incident.



Viewing/Updating Attachments

1. From the **Incident** screen click on the **Attachments** Tab

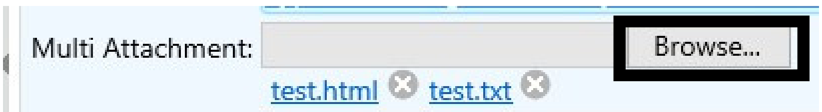


2. Click on the appropriate Attachment

The **Attachment** screen will display

3. Click the **Attachment Link** to open the Attachment. If you have multiple attachments you can click on each one in turn to view them if required.

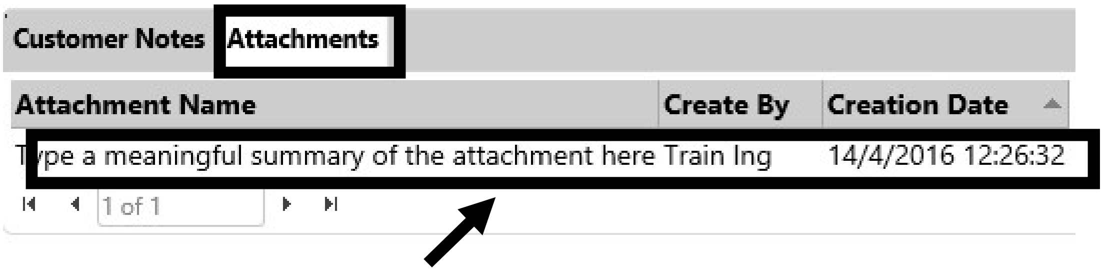
4. You can add further related attachments to this attachment document if required by using the browse button, browsing to the additional files location and selecting it



5. Click **Save and Continue** to save any changes

Removing Attachments

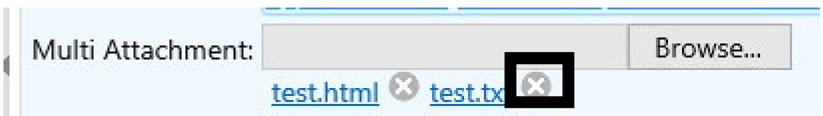
1. From the **Incident** screen click on the **Attachments** Tab



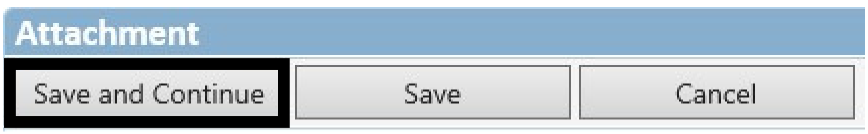
2. Click on the appropriate Attachment

The **Attachment** screen will display

3. Click the **X** button next to the attachment you need removing



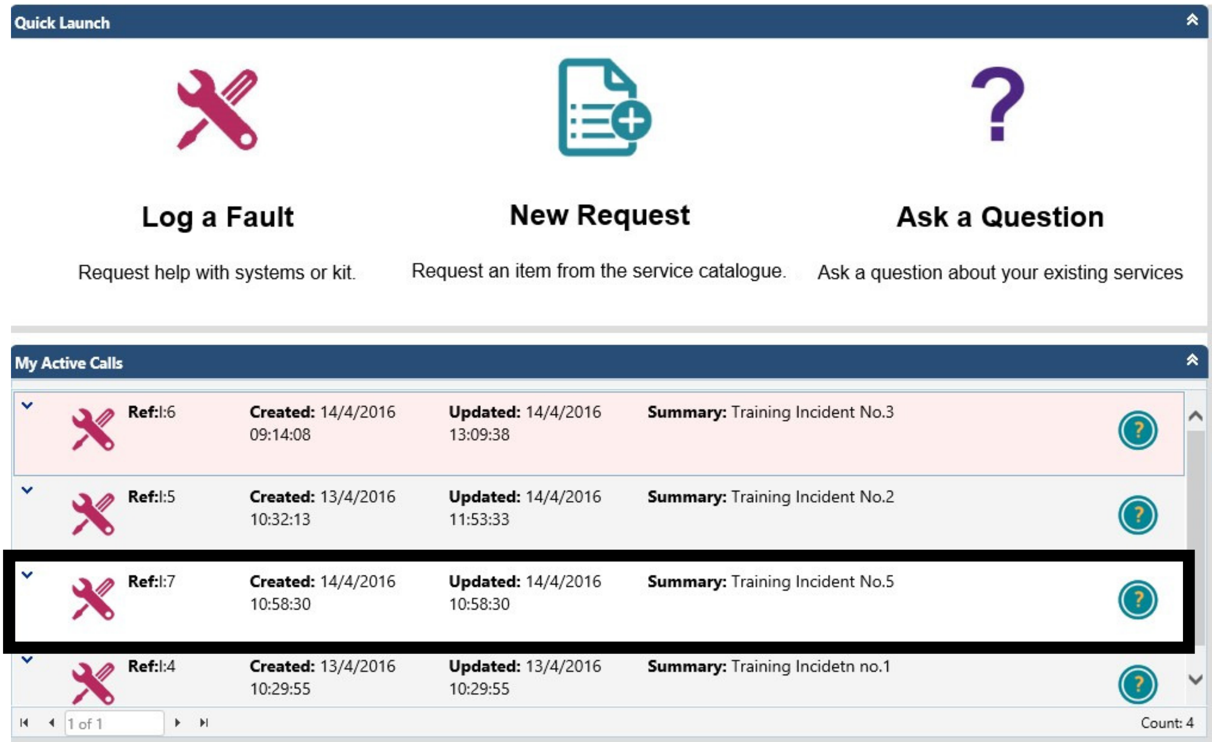
6. Click **Save and Continue** to save your changes



Retrieving / Viewing Existing Incidents

You can access your **open** Incidents from the list displayed on the **Default Service Desk Dashboard** (Home Page). To open a specific Incident simply click on it.

In the example below it is Incident Ref **I:7** that you wish to view, therefore you would simply click on that Incident

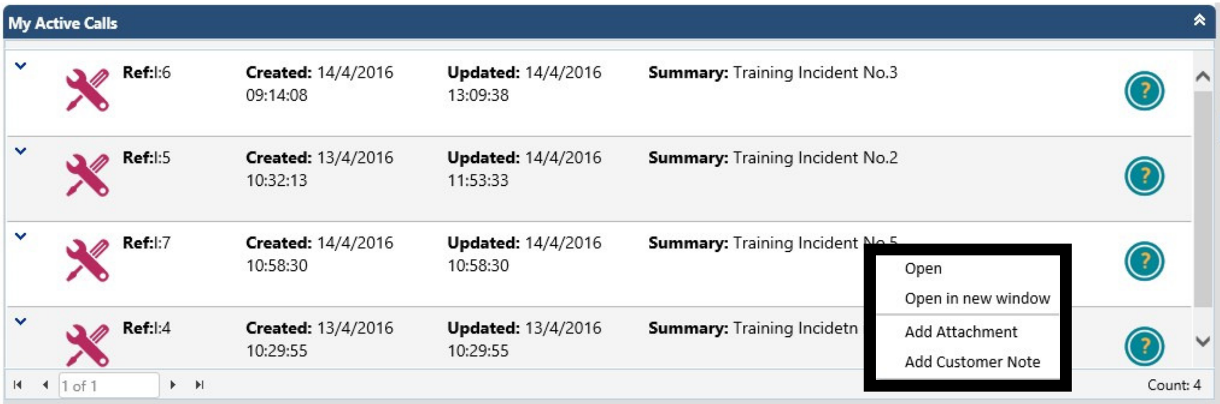


Note: *If you wish to find / view a specific Incident or Incidents that have been resolved, you can use the Search feature detailed later in this document (See* ***Searching for Incidents and Requests*** *on page 25)*

Quick Actions

You can **Open**, **Add Notes to** and **Add Attachments to** Incidents very quickly from the **Default Service Desk Dashboard** (Home Page) by using a **Right Mouse Click** on the relevant Incident.

When you use a **Right Mouse Click** on an Incident a menu will display showing the Actions that you can take with that Incident as shown in the example below



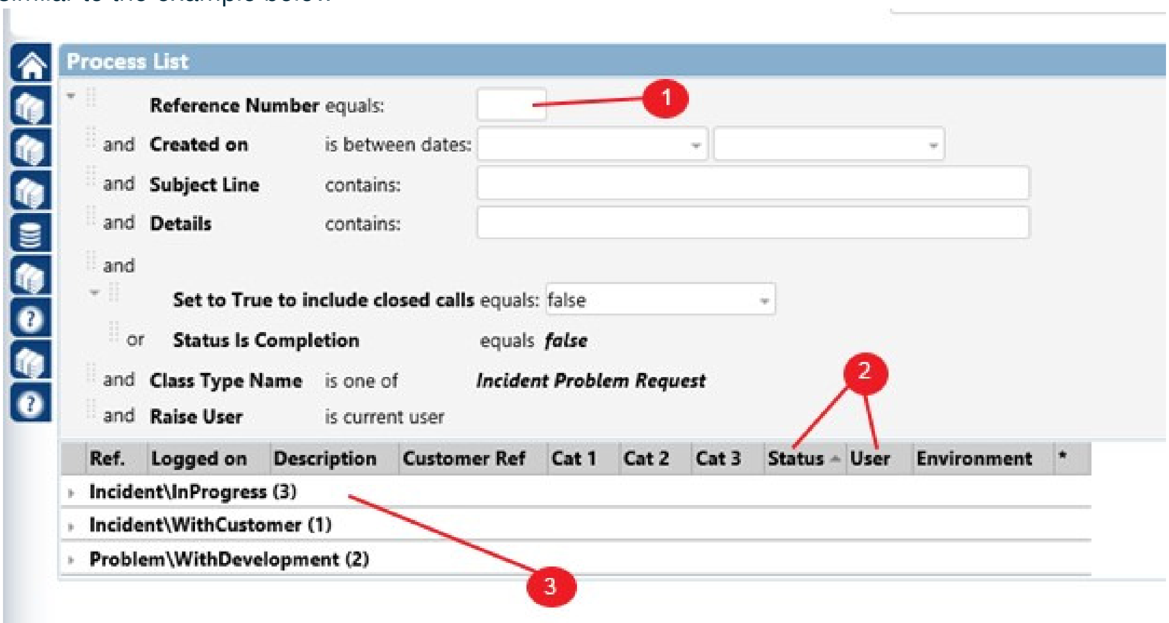
Searching for Incidents and Requests

The Self Service Support Portal provides the ability for you to search through all of your Incidents, Problems and Requests, both Open, Resolved and Closed.

There are different **Search** buttons depending on your role and permissions.
Search (User) allows you to search and view all calls that you have logged personally, Search (Customer) allows you to view all calls that have been logged by yourself or any colleagues the same organisation.

1. Click the **Search (User)** OR **Search (Customer)** button as appropriate and select either **Open Calls** or **Open and Closed Calls** from the drop down.

By default, all of your Open Incidents, Problems and Requests will be grouped together by their status for example: In Progress, With Customer, With Development and Awaiting Response etc. similar to the example below



(1) Search / Filter Criteria

(2) Column Headings

(3) Search Results

The Search Fields

The **Search Fields** are as follows:

- **Reference Number –** is the unique number for your Incident / Request, you only need to put the number in and not the prefix e.g. ***10088*** and not ***I:10088***
- **Created On date range –** filters the results based on the time period
- **Subject Line –** search for words within the subject line of your faults
- **Details –** will search through the full detail contents that were recorded when the Incident was first created

Once you have completed the relevant search fields press the **[ENTER]** key to display all of the results matching the information that you have entered

Grouped Results

You can expand the contents of each group by clicking on the small arrow to the left

1. Click the arrow to the left of the Group you wish to expand

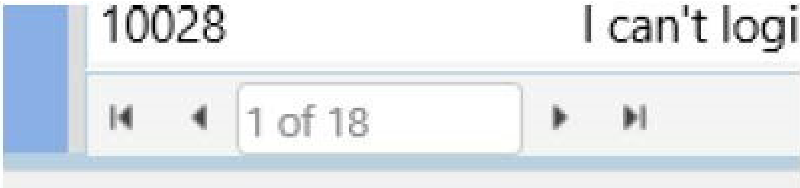
2. The select Group will expand similar to the example below

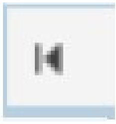
Ref.	Logged on	Details	Customer Ref	Cat 1	Cat 2	Cat 3	Status	User	Environment	Summary
Incident\AwaitingResponse (4)										
I:4	13/4/2016 10:31:39	Training Incident No.1	Train01	Software	Cat 2	Cat 3	AwaitingResponse	Train Ing		Training Incidetn no.1
I:5	13/4/2016 10:33:01	Training Incident No.2	Train02	Hardware	Cat 2	Cat 3	AwaitingResponse	Train Ing		Training Incident No.2
I:6	14/4/2016 09:27:46	Training Incident No.3		Software	Cat 2	Cat 3	AwaitingResponse	Train Ing		Training Incident No.3
I:7	14/4/2016 10:59:13	Training Incident No.5		Software	Cat 2	Cat 3	AwaitingResponse	Train Ing		Training Incident No.5
Request\AwaitingResponse (1)										

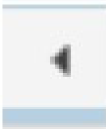
3. To open an Incident simply click on it

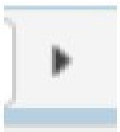
Paging Through the Results List

Sometimes your results list will fill more than a single results page. You can toggle between the different results pages using the page control at the bottom of the results list



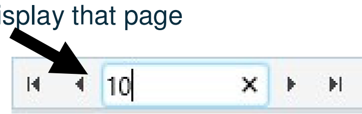
 Displays the **First Page** of results

 Displays the **Previous Page** of results

 Displays the **Next Page** of results

 Displays the **Final Page** of results

You can also type the page number you want to display into the text box in the middle of the page control, then press **[ENTER]** to display that page



civica

Sorting the Results List

The sort order for a set of query results is indicated graphically in the **Column Headers**.

A small arrow next to the **Column Heading** indicates which column the results have been sorted on, it also shows the sort direction

In the example below, the results have been ordered by the **Status** in an **ascending** order

Ref.	Logged on	Details	Customer Ref	Cat 1	Cat 2	Cat 3	Status	ser	Environment	Summary
Incident\AwaitingResponse (4)										
I:4	13/4/2016 10:31:39	Training Incident No.1	Train01	Software	Cat 2	Cat 3	AwaitingResponse	Train Ing		Training Incidetn no.1
I:5	13/4/2016 10:33:01	Training Incident No.2	Train02	Hardware	Cat 2	Cat 3	AwaitingResponse	Train Ing		Training Incident No.2
I:6	14/4/2016 09:27:46	Training Incident No.3		Software	Cat 2	Cat 3	AwaitingResponse	Train Ing		Training Incident No.3
I:7	14/4/2016 10:59:13	Training Incident No.5		Software	Cat 2	Cat 3	AwaitingResponse	Train Ing		Training Incident No.5

You change the sort order by clicking on the **Column Heading** you wish to order the results by.

In the example below the sort order has been changed so that the results are ordered by the **Logged on** details in an **ascending** order

Ref.	Logged on	Details	Customer Ref	Cat 1	Cat 2	Cat 3	Status	User	Environment	Summary
I:4	13/4/2016 10:31:39	Training Incident No.1	Train01	Software	Cat 2	Cat 3	AwaitingResponse	Train Ing		Training Incidetn no.1
I:5	13/4/2016 10:33:01	Training Incident No.2	Train02	Hardware	Cat 2	Cat 3	AwaitingResponse	Train Ing		Training Incident No.2
R:10202	13/4/2016 10:34:51	Training Request No.1	Request01				AwaitingResponse	Train Ing		Training Request No.1
I:6	14/4/2016 09:27:46	Training Incident No.3		Software	Cat 2	Cat 3	AwaitingResponse	Train Ing		Training Incident No.3
I:7	14/4/2016 10:59:13	Training Incident No.5		Software	Cat 2	Cat 3	AwaitingResponse	Train Ing		Training Incident No.5

If you click on a **Column Heading** that is already sorted, the direction of sorting is switched.

In the example below the **Logged on Colum Heading** has been clicked again, this means the results are still ordered by the **Logged on** details but are now in a **descending** order as shown by the new arrow direction

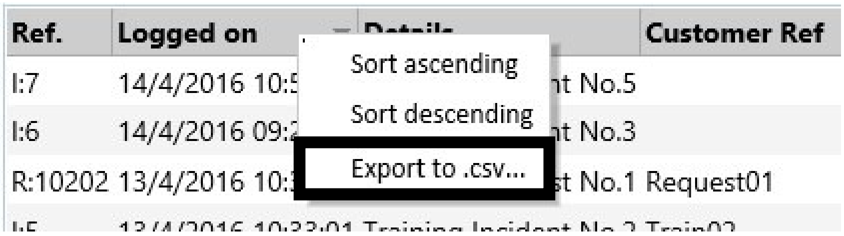
Ref.	Logged on	Details	Customer Ref	Cat 1	Cat 2	Cat 3	Status	User	Environment	Summary
I:7	14/4/2016 10:59:13	Training Incident No.5		Software	Cat 2	Cat 3	AwaitingResponse	Train Ing		Training Incident No.5
I:6	14/4/2016 09:27:46	Training Incident No.3		Software	Cat 2	Cat 3	AwaitingResponse	Train Ing		Training Incident No.3
R:10202	13/4/2016 10:34:51	Training Request No.1	Request01				AwaitingResponse	Train Ing		Training Request No.1
I:5	13/4/2016 10:33:01	Training Incident No.2	Train02	Hardware	Cat 2	Cat 3	AwaitingResponse	Train Ing		Training Incident No.2
I:4	13/4/2016 10:31:39	Training Incident No.1	Train01	Software	Cat 2	Cat 3	AwaitingResponse	Train Ing		Training Incidetn no.1

Alternatively, **right mouse click** on the appropriate **Column Header** then select either **Sort ascending** or **Sort descending** as required

You can sort by more than one attribute by holding the **[SHIFT]** key while selecting the **Column Headers**. The results will be sorted by the column you select first and then by the subsequently selected columns

Exporting Query Results

You can export a query results list to a Character Separated Values file (.CSV file) by **right mouse clicking** the column header of the query results list then selecting **Export to .CSV** as shown in the example below



Depending on the browser you are using and how your browser is configured, you might be asked whether you want to **Save** or **Open**.

.CSV files are typically opened in spreadsheet applications, such as Microsoft Excel

The Request Process

Requests form part of a service catalogue, a collection of items that you might frequently want access to. Similar to an online shopping basket, you pick the items you want and we will then follow the appropriate process to deliver those requests to you.

Some items might have a fixed value, for instance a training course, other items might be free of charge (for instance, setting up a new user on the system) other items might require a bespoke quotation (for instance an enhancement to the software).

Requests are **not** for recording issues or faults with a system / software, please use the **Log a Fault** option that will take the issue through the Incident process.

A high level diagram of the Request Process is contained in **Appendix B**

Note: *This section assumes that you have already read the Incident Process and are familiar with the interface and common fields such as Categories*

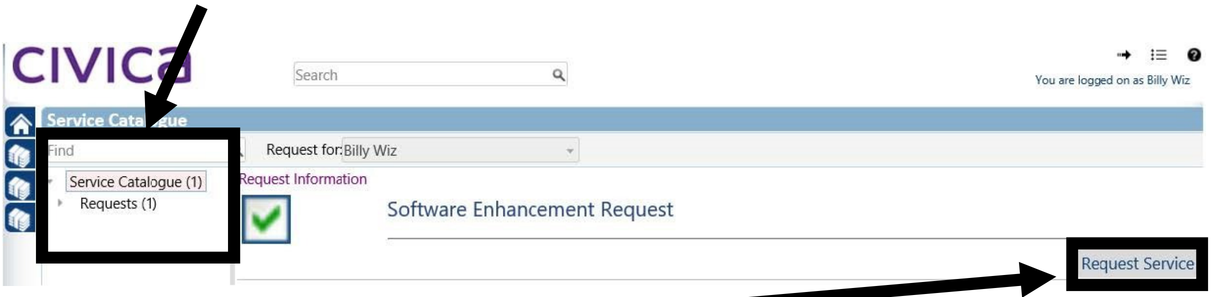
Requesting an Item

1. Click the **New Request** quick launch button from the **Default Service Desk Dashboard** (Home Page)

2. The **Service Catalogue** will display. This is where you choose the type of request you are making

In the following example we will select the **Software Enhancement Request** to request that a screen be changed

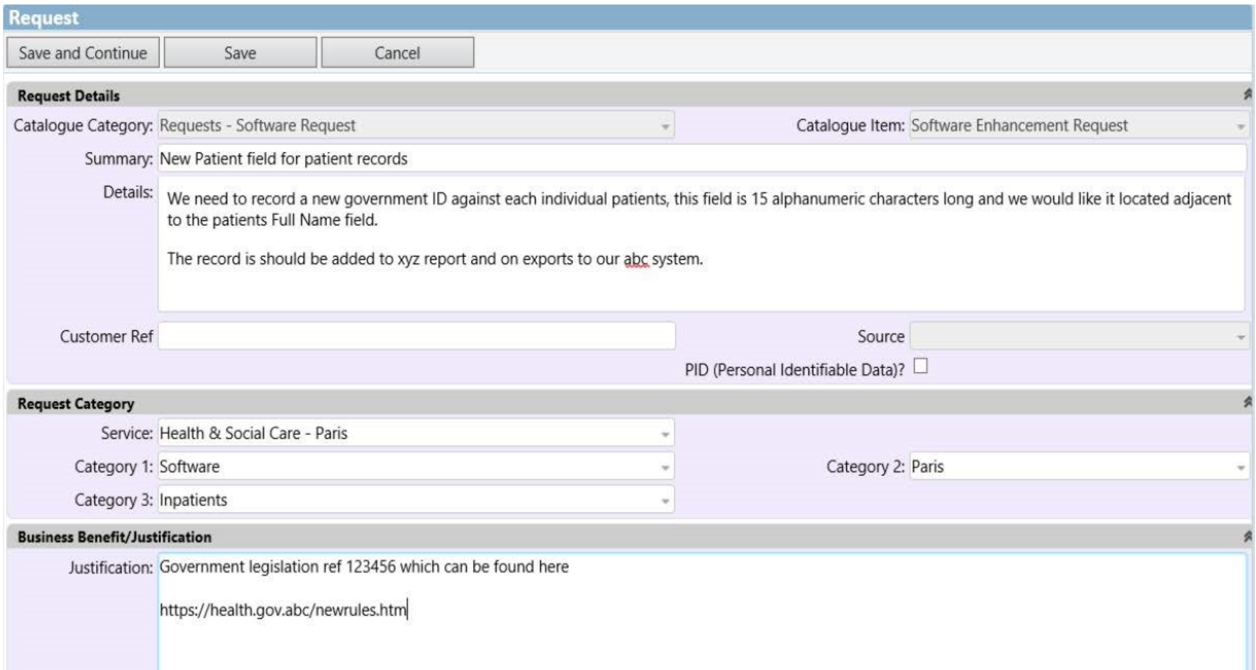
1. Select the required request



2. Click the **Request Service** button

The **Request** screen will display.

3. You need to complete the fields (see **Understanding the Request Attribute Fields** on page 33)



Note: *You should add as much detail as possible so that our consultants fully understand what you are asking for, this is especially important for Software Enhancement Requests.*

Understanding the Request Attribute Fields

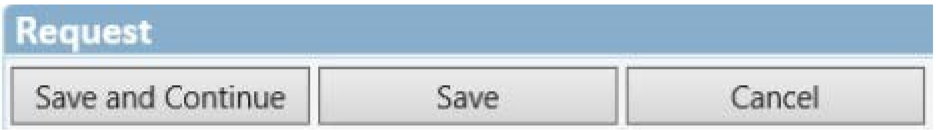
The Request window may contain any of the following attributes:

(M) = Mandatory Field

Summary (M)	Should contain a quick summary of the enhancement you are requesting
Details (M)	Should contain as much information as possible to allow our consultants to understand what you are requesting. Please use screen shots by either pasting them into this field (using Windows Cut & Paste) or adding them as attachments after you have saved the Request
Service (M)	Please select the relevant service the request is related to if this is not already pre-populated The service acts like a top level category that will filter items that are relevant to your organisation and route your issues to the appropriate Business Units within Civica ***Note:*** *If you only receive one service from Civica this field will automatically populate*
Categories (M)	Please select the relevant categories if not already prepopulated. Categories enable you to pinpoint your issue into preconfigured types so that we can manage the Incident more effectively. For example, an IT service desk may have the Categories **Hardware, Software** and **Infrastructure**. These categories describe the nature of the support requirement, and enable the service desk to assign Requests to the Analyst, Group or Role that is best equipped to deal with a particular type of issue. **Category 3** is driven by the selection of **Category 2** and may not be required.
Customer Ref	This field is for you to record your own unique reference number against the call. This may be the number of a related call in your own service management tool.
Justification	If prompted, please provide the Justification for this request This field should contain the rationale as to why the request is needed and the impact on the business if the product or service continued in its current form

Saving the Details

Once you have entered all of the details and selected the relevant Categories, you have three options at the top of the screen.

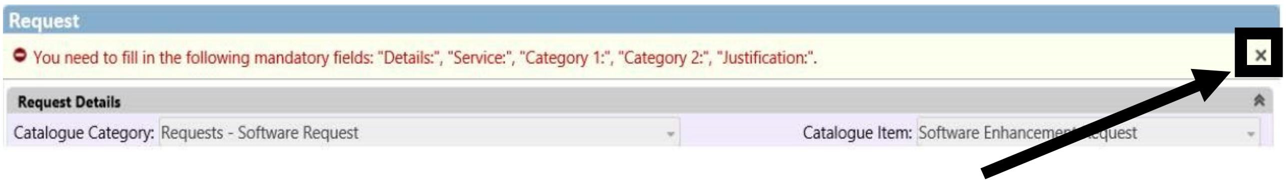


Save and Continue - will save the request and will inform you of the Reference Number**.** Clicking continue will then return you to the **Default Service Desk Dashboard** (Home Page)

Save – will save the request and leave you on the Request screen so that you can either perform the Actions **Add Attachment** or **Add Customer Note**. You will see your Reference Number at the top of the screen

Cancel – will return you to the **Default Service Desk Dashboard** (Home Page) without recording the Request

Note: *On occasion these button are hidden by an error message, for example if you have previously tried saving the request without completing all of the mandatory fields*



Close the error message by clicking on the **'X'** on the right side of the message
You can track the progress of your Requests by looking through the list on the **Default Service Desk Dashboard** (Home Page) underneath your Active Requests as shown in the example below

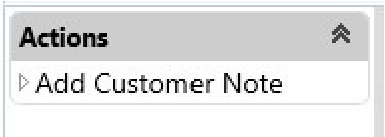
My Active Requests

Reference Number	Summary	Status	Creation Date	Request Type
10001	Software Enhancement Request	Provisioning	16/10/2015 09:04:17	Civica Generic Request
10086	Software Enhancement Request	Awaiting Authorisation	4/11/2015 11:09:11	Civica Generic Request
10089	New Patient field for patient records	Awaiting Authorisation	13/11/2015 11:43:04	Civica Generic Request

1 of 1 Count: 3

Or by using the **Search** facility on the left side (in the same way shown earlier when searching for Incidents)

Note: *You can add Customer notes to the request by opening it and selecting **Add Customer Note** from the **Actions Section** in exactly the same way as with Incidents (as shown earlier in this guide)*



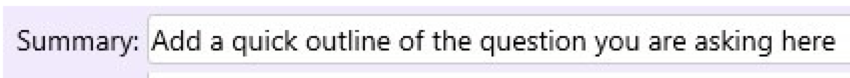
Asking a Question

You can ask Civica a question about your existing services by clicking on the **Ask a Question** quick launch icon on the home page

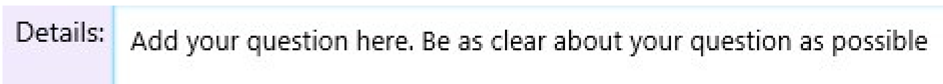
Asking a Question

1. **Click the** Ask a Question icon **on the** Home Page

1. In the **Summary** field we add a quick outline of the question we are asking



2. In the **Details** field type in your question. Be as clear as possible so that the Civica Consultants fully understand what you are asking



3. In the **Service** field select the service you are raising the question about

4. Click **Save and Continue**

Your **Reference Number** will display

5. Click **Continue**

Your question will be displayed in the **My Active Requests** with any other Requests or Questions you have raised.

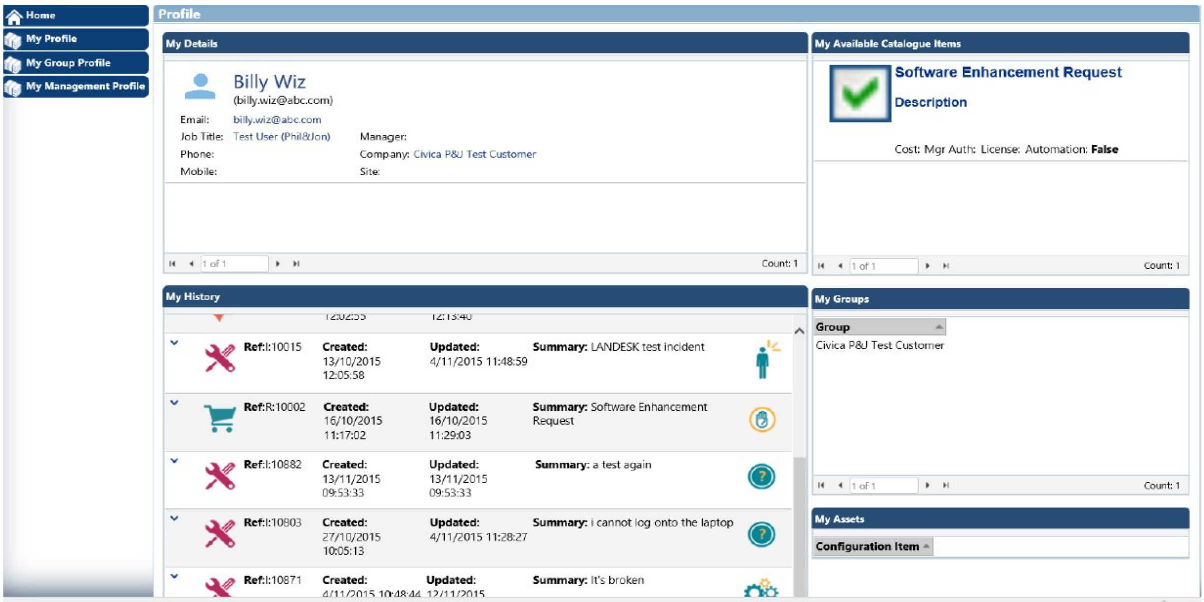
You can add a **Customer Note** to a question in the same way as with **Incidents** and **Requests**

My Profile Dashboard

Selecting **My Profile** from the **Default Service Desk Dashboard** (Home Page) takes you to a dashboard that shows details specifically against your profile

1. Click the **My Profile** button

The **Profile** screen will display similar to the example below



My Details – The information contained in your Profile such as Email Address, Phone Number etc.

My Available Catalogue Items – These are the type of requests that you can make e.g. Software Enhancement Requests, New Laptops and Consultancy Days etc.

My History – A record of all your open and closed Incidents and Requests

My Groups – This identifies which organisation(s) you are associated with in the Self Service Support system

My Assets – If you are receiving a Managed Service from Civica this will list all of the assets we have allocated to you on the system

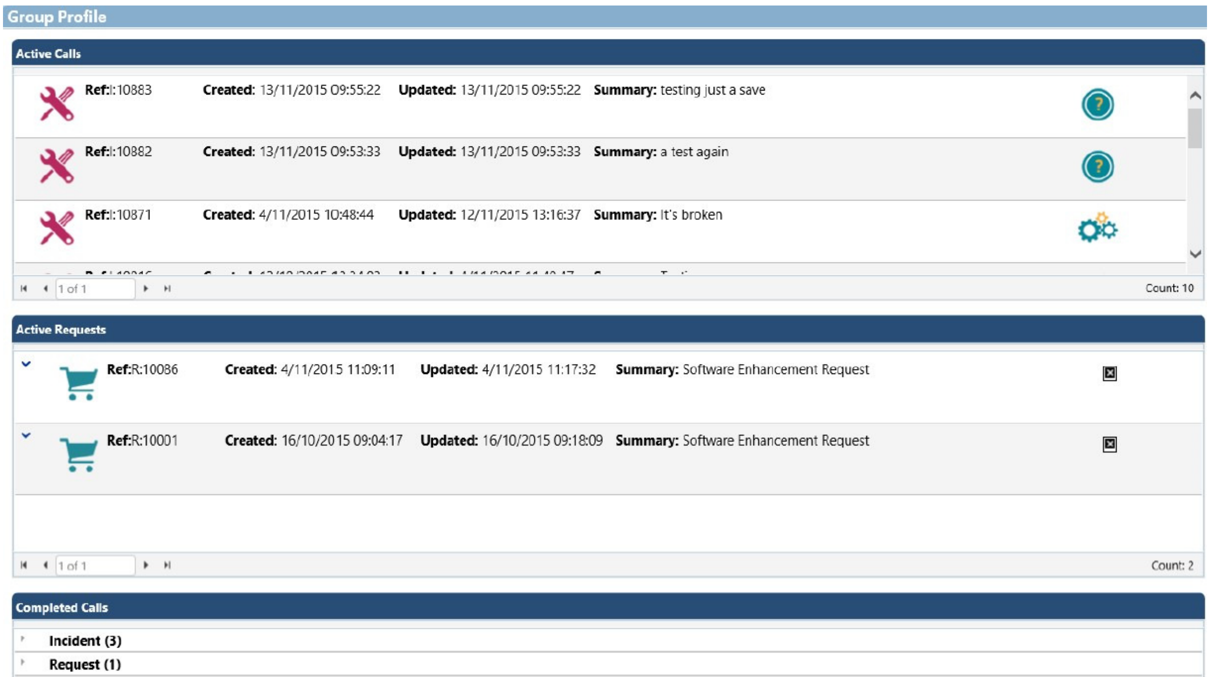
My Group Profile*

*** Note:** *This option is only available to users with a specific role*

Selecting **My Group Profile** from the **Default Service Desk Dashboard** (Home Page) takes you to a dashboard that shows details of all Incidents / Faults / Requests recorded against your customer profile (department within your organisation)

1. Click the **My Group Profile** button

The **Group Profile** screen displays similar to the example below



Active Calls – A list of all open Incidents & Problems

Active Requests – A list of all the open Requests

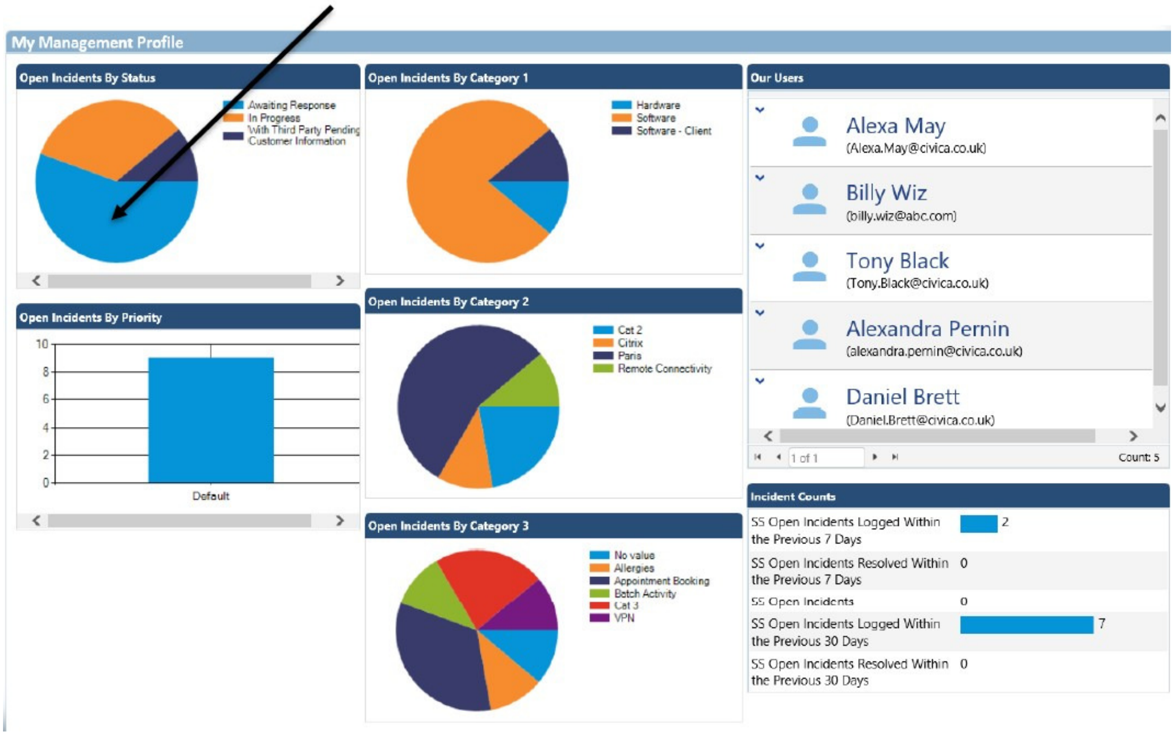
Completed Calls – A grouped list of all the closed Incidents, Problems & Requests

My Management Profile*

***Note:** This option is only available to Managers*

Selecting **My Management Profile** from the **Default Service Desk Dashboard** (Home Page) will take you to a dashboard that show graphical chart of all Incidents recorded against your organisation.

Clicking on a segment of the pie charts or bar charts will take you to a list of the records held against that segment. For instance, if you wish to view all of the Incidents that are at the Awaiting Response stage you can click the segment Identified by the arrow below



***Note:** If there are more than six items to display in the Pie Chart it will record a segment showing **other**. Clicking on the **other** segment will take you to another pie chart showing the 'other' values.*

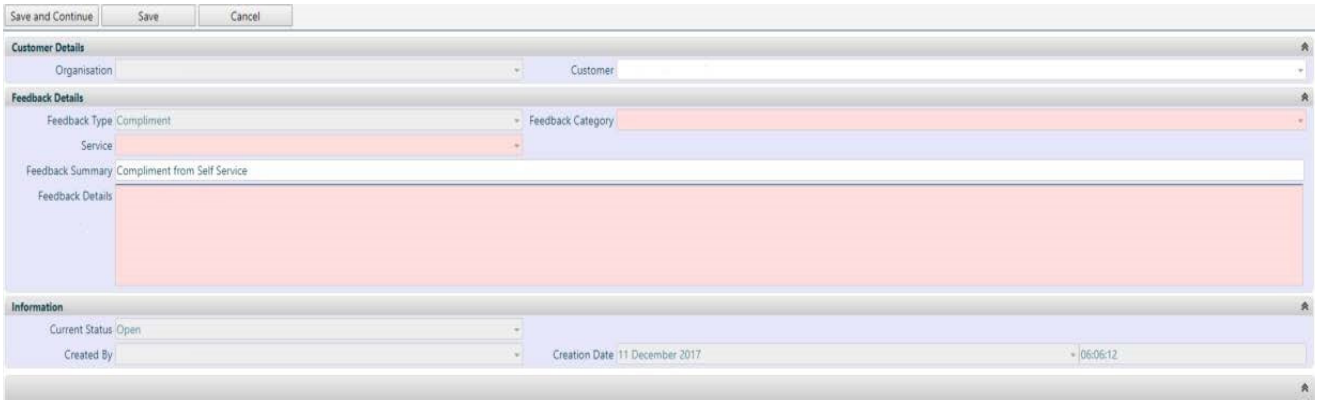
Open Incident by Status – A chart of Incidents grouped by status
Open Incidents by Category 1 – Open Incidents grouped by Category 1
Open Incidents by Category 2 – Open Incidents grouped by Category 2
Open Incidents by Category 3 – Open Incidents grouped by Category 3
Our Users – A list of users associated with your customer record
Incident Counts – A Summary of Incidents logged and resolved over the last 7 days and 30 days.

Feedback

Selecting **Feedback** from the **Default Service Desk Dashboard** (Home Page) will take you to a dashboard that allows users to make compliments, improvement suggestions or complaints.

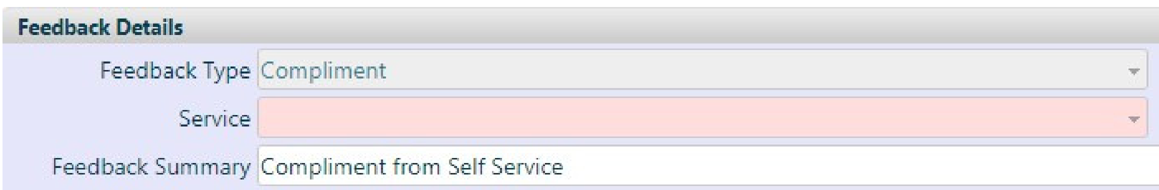
Clicking on any of the links will take the user to the respective form for each.

These forms all use the same format below.



Select ‘Feedback Category’

and Service from a dropdown box.



Add in your feedback details

And now click ‘Save and Continue’ to save the feedback and navigate to the dashboard or ‘Save’ to save the feedback and stay on the same page for more options.

Appendix A – ITIL Definitions

Service Management

Service Management is the chain of activities, support and escalation that are delivered by IT and other service provider organisations. This delivers consistent, efficient and accountable services and service experiences to customers, by using repeatable processes, best practice and governance.

IT Service Management

IT service Management (ITSM) is the generic discipline in this area – **ITIL** is the most prolific programme of guidelines, publications and training used for ITSM globally.

ITSM Key Areas

Continual Service Improvement – the focus of all ITSM activity must be to deliver quality services in an environment of continual improvement, this is achieved by measurement as a means to drive incremental changes, applying good problem management and also using knowledge management to improve resolution times and avoid re-work

Incident Management – the process of restoring services that have failed or been interrupted from normal operations, ideally done as quickly as possible and in line with business profiles.

Problem Management – the process to avoid, remove and minimise incidents and recurring issues, by identifying trends and taking actions to remove root causes.

Request Management – this is the process to accept, approve and deliver user requests for new equipment or standard services, usually provided via an online portal. The automation of this process can help to speed up delivery of requests, which can often be a bottle neck for users.

Change Management – the process to control and manage any changes to the customer services, by assessing the risk and potential impact of downtime, avoiding carrying out changes in critical business periods and minimising any impact of unplanned changes.

Service Level Management – defining business services and service levels to set clear targets for delivery and using these targets through reporting as a measure of success in Service Delivery.

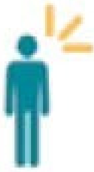
Configuration Management – this involves defining and maintaining records of assets, technology, people and other organisational details in order to map and assess relative risk and interdependence, as well as just keeping good accountable records.

Appendix B – Process Stages and Icons

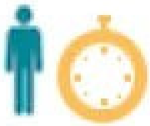
Incident Icons and Stages

Awaiting Response – The Incident has been recorded on the system and is waiting for a Civica Analyst to review it

In Progress – Your Incident has been reviewed and is now being managed



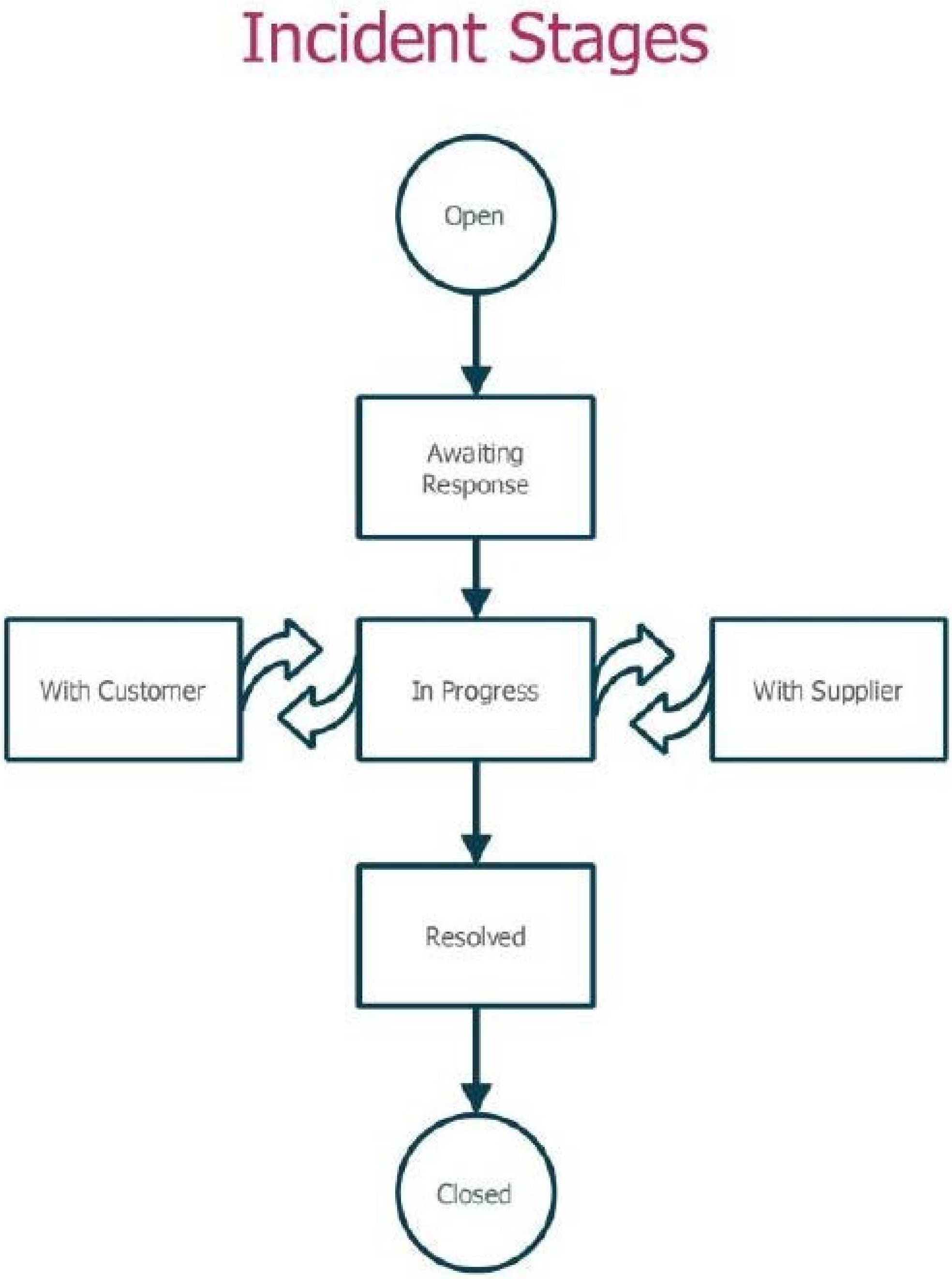
With 3rd Party – Your issue has required the help from a 3rd Party organisation (for instance a Telecommunications provider)



Waiting for Customer – We are waiting for a response from you, the customer, to either give permission to close a call or to provide us with more information about the issue

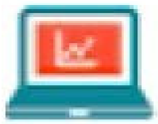
Resolved or Closed – The fault is considered to be resolved and no longer an issue

The diagram below shows the Incident stages, and the flow the Incident Process can take:



Problem Icons and Stages

Discovery – We are in the process of identifying the symptoms of the problem and in the process of creating a plan to track down the route cause



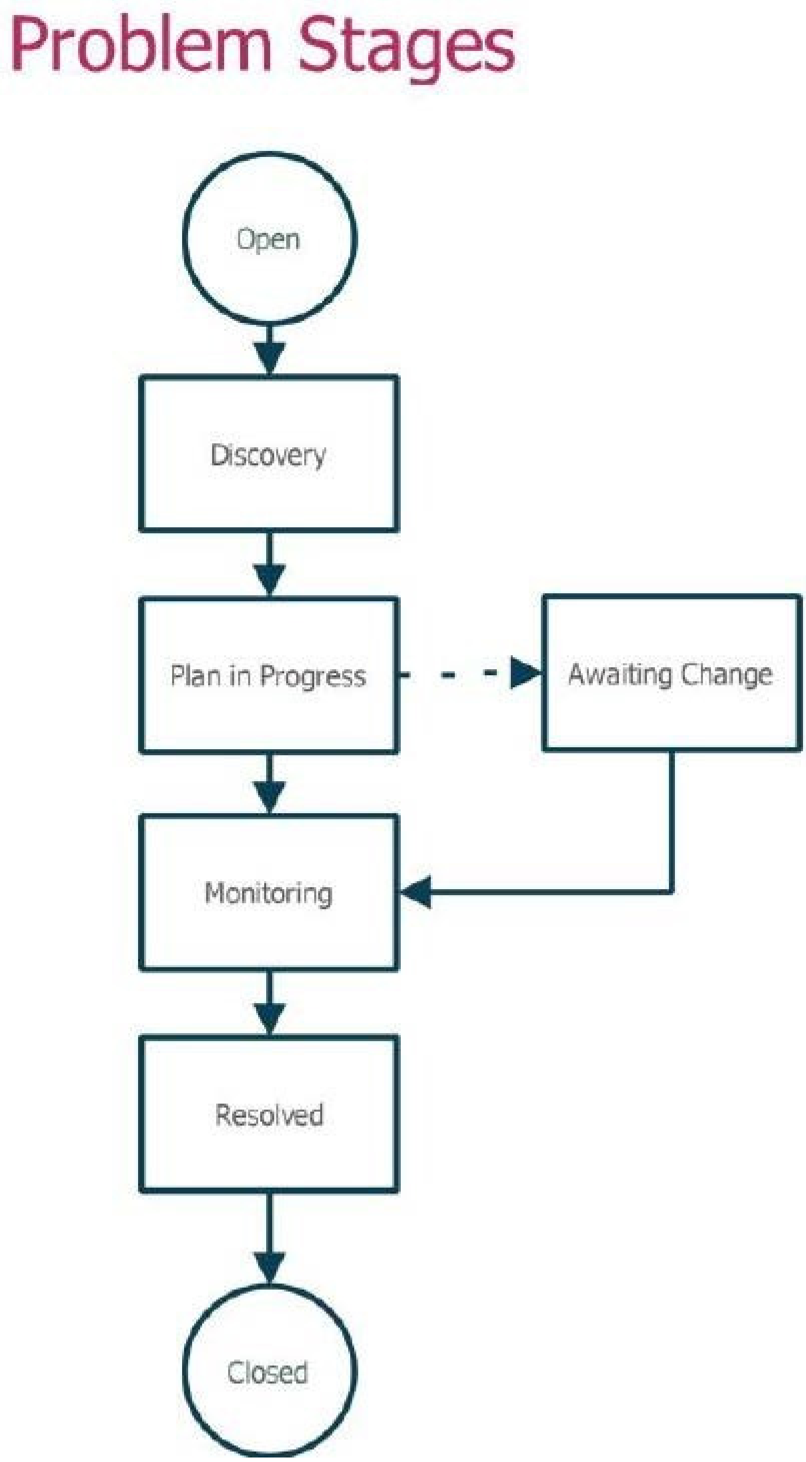
Plan in Progress – We now have a plan of action and are carrying out the investigative work to identify the root cause

Awaiting Change – We have identified the root cause of the problem and need to implement a change

Monitoring – We believe the problem has been resolved, but are carrying out a period of monitoring to check it doesn’t re-occur

Resolved / **Closed –** the fault is considered to be resolved

The diagram below shows the Problem Stages, and the flow the Problem Stages can take:



Request Stages and Icons

Awaiting Authorisation – Request have to be authorised before they can proceed. Each type of request can have different levels of authorisation.

Stock Check – We now have a plan of action and are carrying out the investigative work to identify for the root cause

Awaiting Availability – We are waiting for stock to become available

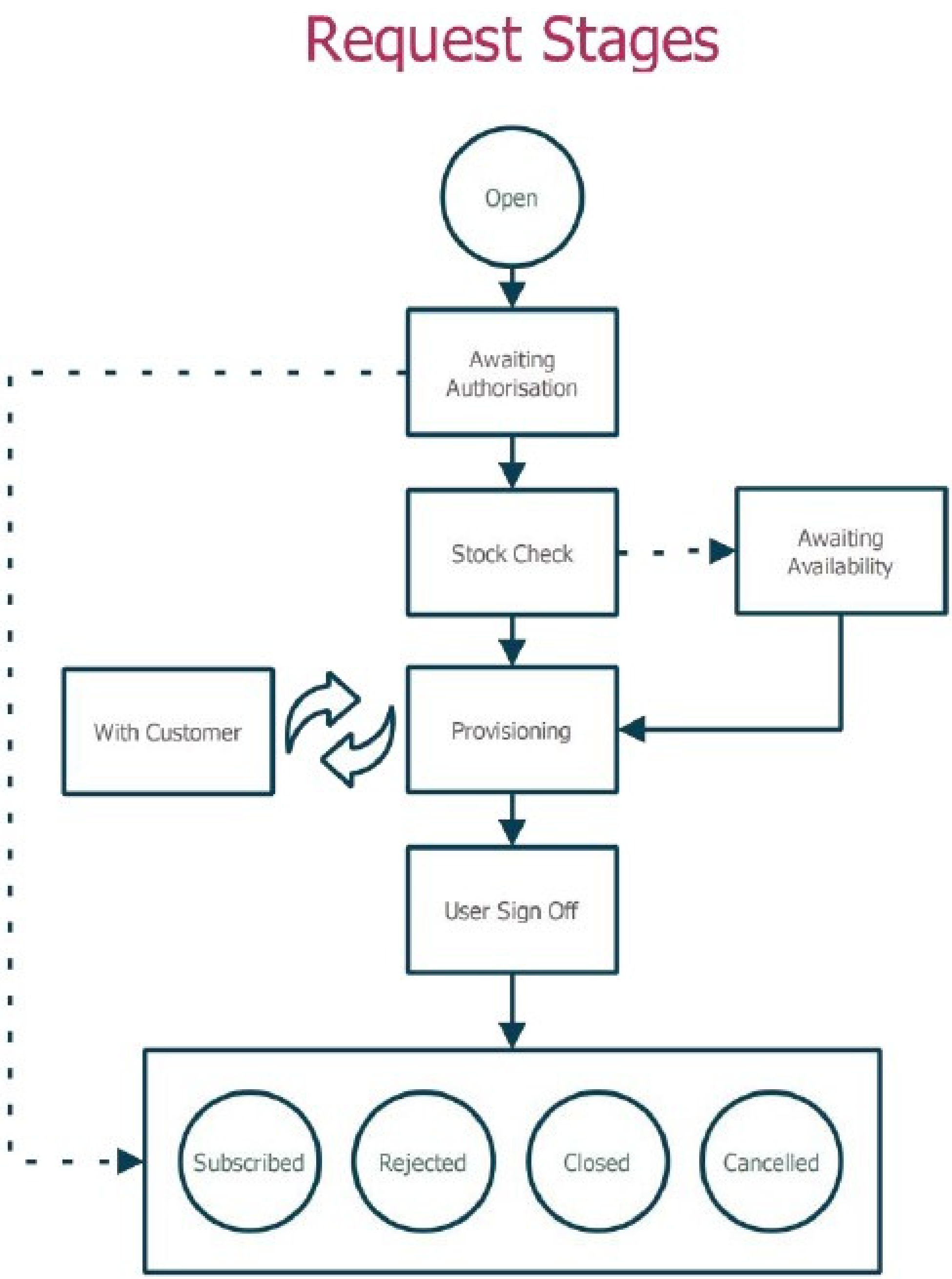
Provisioning – We have identified the root cause of the problem and need to implement a change

User Sign Off – We believe the request has been resolved, but are carrying out a period of monitoring to check it doesn’t re-occur

Subscribed / **Closed -** Your request has been completed successfully

Rejected / **Cancelled –** Your request was either cancelled or rejected

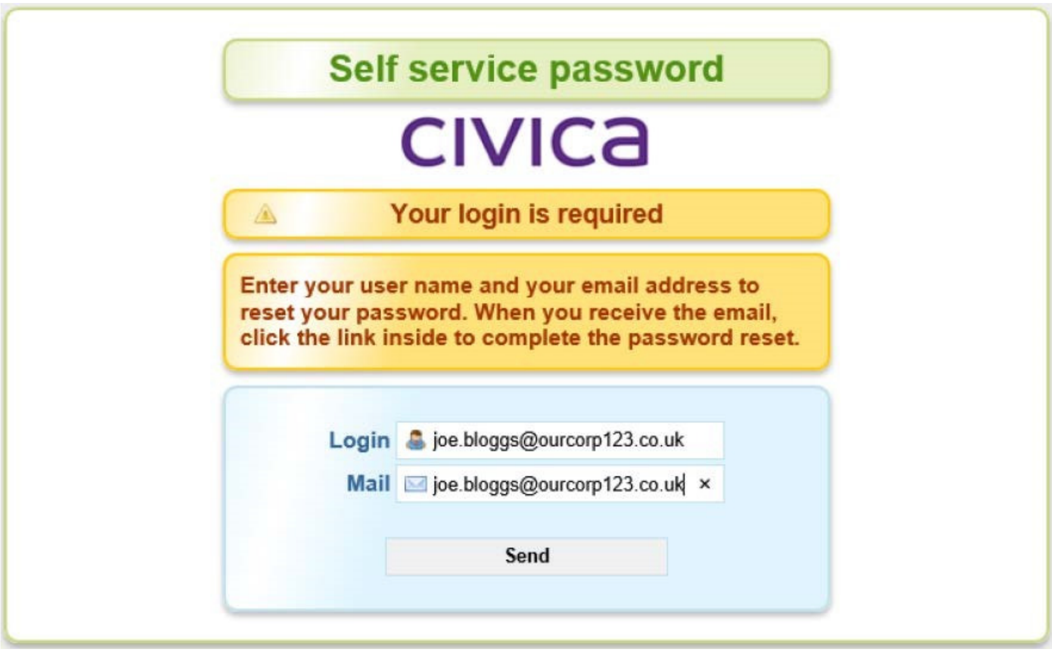
The diagram below shows the Request Stages and the flow that the Request Stages can take:



Appendix C – Resetting your Password

If you have forgotten or lost your Password, you can reset it from the **Self Service Login Page** Navigate to http://servicedesk.civica.co.uk/selfservice/ss and select the **Reset My Password** option as shown below

This will take you to the Password Reset Function, your **Login (UserName)** will be your work email address, for example: joe.bloggs@ourcorp123.co.uk repeat this in the **Mail** field and then click the **Send** button similar to the example below



If you have entered your details correctly, you will see the following screen:

After a short period of time you should receive an email with a link to reset your password, if you do not receive an email after 5 minutes please check your trash and spam email folders.

You must click the link in the email from the system within 1 hour, or the password reset request will no longer work.

The email will look similar to the following, click the link in blue under the **"Click here to reset your password"** text and you will be taken to a screen where you can reset your password

From: sdadmin@civica.co.uk
Sent: 04 December 2015 11:13
To: philwright@live.com
Subject: Reset your password

Hello joe.bloggs@ourcorp123.co.uk,

Click here to reset your password:
http://servicedesk.civica.co.uk/SelfService/ssp/index.php?action=resetbytoken&token=44:brY6PVpL6TAOVTKSHlR5icwaqEWd57Ms8/lzfoLMGCc=P52dBcdWqYWZ/Jgzw06vlMW+VNJYksELQQw=

If you didn't request a password reset, please ignore this email.

This e-mail is sent for and on behalf of Civica UK Limited company number 01628868, Civica Services Limited company number 02374268, or Civica Group Limited company number 04968437.
All companies are registered in England and Wales and each has its registered office at 2 Burston Road, Putney, London, SW15 6AR.
Confidentiality: This e-mail and its attachments are intended for the above named only and may be confidential. If they have come to you in error you must take no action based on them, nor must you copy or show them to anyone. If you have received this in error please advise the sender by replying to this e-mail immediately highlighting the error and deleting it from your system.

Once you have clicked the link in the email you will be presented with the following screen, please enter your new password twice.

The password must meet the following complexity requirements:

- **A minimum of 8 characters**
- **Must contain at least one Upper case character**
- **Must contain at least one Lower case character**
- **Must contain at least one Symbol**

If your new password does not meet the password complexity requirements, you will receive the following message, so please try again

If your password was set correctly you will receive the following message

Now you can close the window and try logging into the Service Desk again at
http://servicedesk.civica.co.uk/selfservice/ss