

CIVICA

Transforming the way you work



Civica Self-Service Support Portal

Customer User Guide

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1 Introduction

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

1.1 Supported Web Browsers

Note: 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

1.2 Screen Images

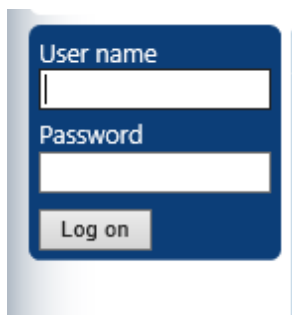
Screen images used throughout this User Guide have been taken from the Civica Training System. They are provided to help you recognise the part of the System you are using.

2 Logging into the Self-Service Support Portal

Access to the self-service support portal is via the following link and can be saved as a favourite for ease of use.

<https://servicedesk.civica.co.uk/SelfService/ss/>

Insert your user name (full email address in lower case) & password and select “Log On”.



If you have forgotten your password, or you have attempted a number of times unsuccessfully and locked your account, please see Section 2 which highlights the process of resetting your password.

3 Resetting your password

Access the Self-Service Support Portal via the following link;

<https://servicedesk.civica.co.uk/SelfService/ss/>

Select “Reset My Password”



Reset My Password

Password Reset

You will be required to insert your full email address into both the ‘**Login**’ field and the ‘**Mail**’ field. Both fields therefore contain the exact same information and should look something like below.

Note: it is important at this stage that you input your email address in lowercase into both the “Login” field and the “Mail” field.

The screenshot shows a web interface for password reset. At the top is a green header with the text 'Self service password' and the 'CIVICA' logo. Below this is a yellow warning box with a triangle icon and the text 'Your login is required'. Underneath is another yellow box with instructions: 'Enter your user name and your email address to reset your password. When you receive the email, click the link inside to complete the password reset.' The main form area is light blue and contains two input fields, both with the email 'joe.bloggs@ourcorp123.co.uk'. The first field is labeled 'Login' with a person icon, and the second is labeled 'Mail' with an envelope icon. A 'Send' button is positioned below the fields. At the bottom right of the form area, there is a small link that says 'Rectangular Ship!'.

If you have entered your details correctly after selecting '**Send**', you will see the following message:

This screenshot shows the confirmation message after a password reset request. It features the same green header with 'Self service password' and the 'CIVICA' logo. Below the header is a green box with a checkmark icon and the text 'A confirmation email has been sent'.

After approximately 5 minutes you should be sent an email with a link which will enable you to reset your password.


Note: you must click the link in the email **within 1 hour** of receipt of the email or the link will become inactive. If one hour has passed and the link has become inactive, please start the process again.

The email you receive should look similar to below. Click on the link underneath "Reset your Password" and you will be taken to a screen which will allow you set your new password.

Enter your chosen password into both the "New Password" field and the "Confirm" field.

Self service password


CIVICA

 **Your new password is required**

The link sent by email allows you to reset your password. To request a new link via email, [click here](#).

Login

billy.wiz@extranet.local

New password 

Confirm 

Send

Note: the password you choose must meet the following 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 password does not meet the complexity requirements, the following message will display, please try again with a different password ensuring you follow the complexity requirements.

 **Password was refused by the LDAP directory**

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

Self service password

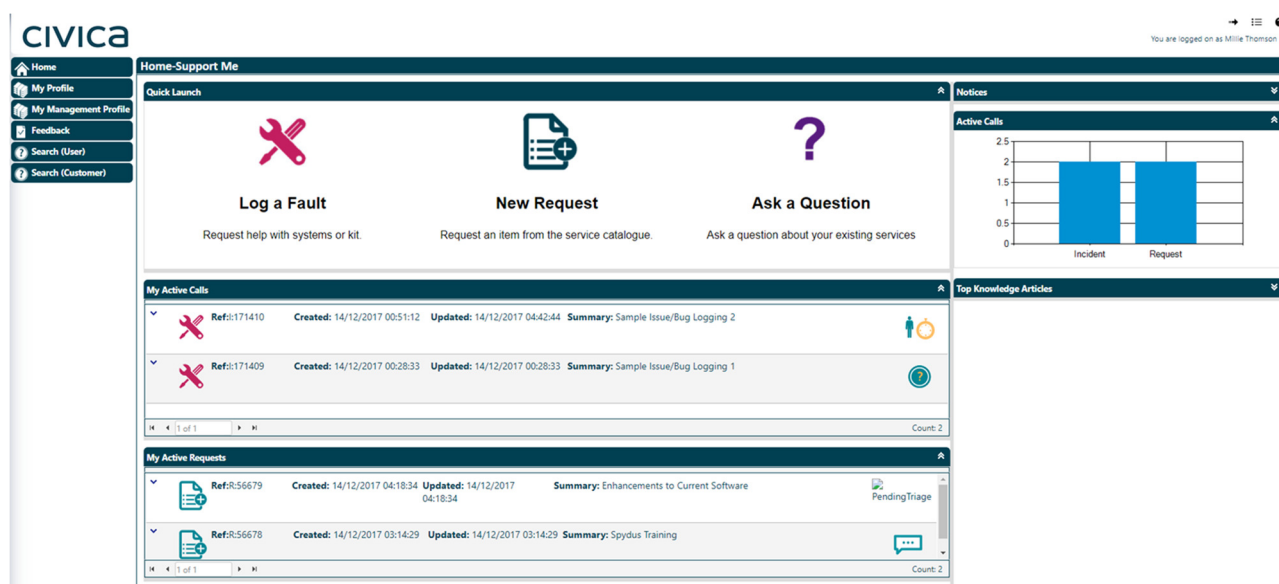
CIVICA

 **Your password was changed**

You can now close this window and log in using your new password at
<https://servicedesk.civica.co.uk/SelfService/ss/>

4 Home Screen (Dashboard)

On the “Home Screen” of the self-service support portal you will see all currently open and submitted tickets.



The following areas are visible on your Home Screen:

4.1 My Active Calls

In the ‘Active Calls’ section of the dashboard you will find all your current active Faults (Incidents).




Next to each Fault you will see an icon which displays the current status of your Fault.

Note: this section will be empty if there are no outstanding Faults.

My Active Calls					
▼		Ref#:5	Created: 13/4/2016 10:32:13	Updated: 13/4/2016 10:32:13	Summary: Training Incident No.2
▼		Ref#:4	Created: 13/4/2016 10:29:55	Updated: 13/4/2016 10:29:55	Summary: Training Incident no.1

4.1.1 Explanations of Icons

ICON	Short Description	Details
	Awaiting Response	The Fault has been recorded on the system and is waiting for a Civica analyst to review it.

	In Progress	Your Fault has been reviewed and is now being managed by a Civica analyst.
	With a Third Party to resolve the call	Your Fault requires the help from a third party organisation (i.e. a telecommunications provider).
	Waiting for the Customer	Civica is waiting for a response from you, e.g. to either provide further information or to give us permission to close your Fault.

4.2 My Active Requests



In the 'Active Requests' section of the dashboard you will find all your current active Requests.

Next to each Request you will see an icon which displays the current status of your Request.

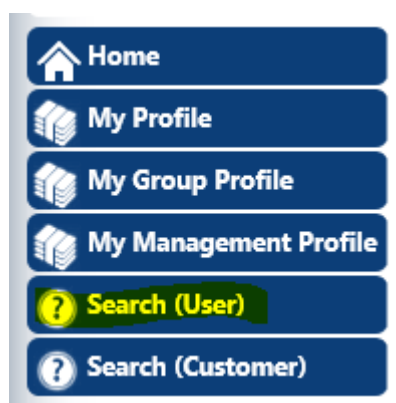
Note: this section will be empty if there are no outstanding requests.

My Active Requests				
	Ref:R:10202	Created: 13/4/2016 10:34:24	Updated: 13/4/2016 10:34:24	Summary: Training Request No.1

4.2.1 Explanation of Icons

ICON	Short Description	Details
	In Progress	Request has been received and is in progress.
	Waiting for the Customer	Civica is waiting for a response from you, e.g. you have been asked to either provide further information or to give us permission to close your request.

4.3 Searching for Faults (Incidents) / Requests

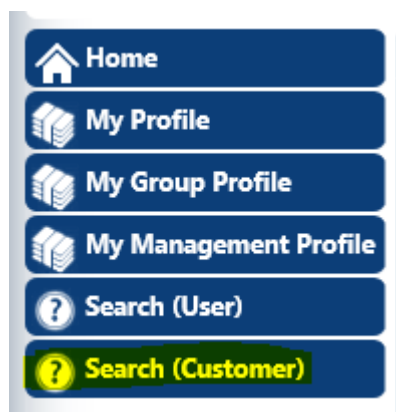


Selecting this option restricts the search to Faults and Requests raised by the user logged into the System and will enable you to search on:

- Open Calls (User)
- Open and Closed Calls (User)

Selecting either of the options will allow you to search further on call logs by selecting specific criteria.

4.4 Searching for Customer Faults (Incidents) / Requests



Selecting this option will enable you to search on Faults and Requests raised by everyone within your establishment.

- Open Calls (Customer)
- Open and Closed Calls (Customer)

Selecting either of the options will allow you to search further by selecting specific criteria.

This view also provides more analytical data and information about all of the users within your establishment who are currently approved to log Faults and Requests.

5 Logging a Fault (Incident) or Request

Select “Home”



You can log Faults (Incidents) and Requests via the self – service support portal.



Log a Fault



New Request



Ask a Question

Select “**Log a Fault**” when reporting a fault or incident i.e. something has broken or has stopped working. See *Section 4.1* for examples of when you would choose “**Log a Fault**”.

Select “**New Request**” when you need to ask for a service or ask for information. See *Section 4.1* for examples of when you would choose “**New Request**”. Requests are not for recording issues or faults with a system/software, please use the “Log a Fault” option that will take you through the Incident process.

Select “**Ask a Question**” when you need to ask for something that isn’t an Incident or a Request.

5.1 Types of Faults and Requests

The range of possible requests can be viewed in the Service Catalogue which is accessible from the Home screen in the Self-Service Portal by selecting ‘New Request’. The table below shows examples of items that should be logged as faults and those that should be logged as requests.

Fault (Incident) Examples	Request Examples
Error Messages Displayed	Civica Portal Access For New User
Something is Broken And Was Previously Working	Change Requests of Any Kind
Report Not Finding Expected Results	Software Enhancement Request
Configuration Not Working As Expected	Training/Sales/Account Management/Consultancy Enquiry
Export Not Working As Expected	Software Upgrade Request

System Down *	Documentation Request
Locked Records	Request to Have a New Report or an Existing Report Modified
Performance (speed) Issues	Access provisioning - group

* As an example, a “System Down” is a Priority 1. Whilst it is fine to log a Priority 1 on the self-service support portal, it is essential you follow this up with a telephone call to the Service Desk.

5.2 Simple Processes for Logging a Fault or Request

Log a Fault (Incident)

Complete all the fields highlighted in **red as these are mandatory fields**. Please complete these fields as accurately as possible.

Summary: A brief description of the issue that helps quickly identify what is wrong.

Details: More in depth details of the issue.

When contacting the Service Desk, the following information should be provided as a minimum;

1. Concise description of the problem (plus any error messages) **Note:** The 'Summary' field is limited to 255 characters
2. Environment (live, test, train),
3. Number of users affected,
4. Length of time the problem has been presenting itself,
5. The steps you completed to allow the Service Desk team to replicate the issue reported.

Service: If this doesn't default, select from the option(s) available. You may have more than one option if you are attached to more than one establishment.

Category 1: choose from the options available

Examples: Software, Cloud (Managed Service), Network, Hardware

Category 2: choose from the options available

Examples; Spydus, Maze, CE Admin, iWise, Spydus Manager

Category 3: choose from the options (if there are any)

Examples; In this case the list drills down to a larger list of specific product modules or functions

Customer Ref: Insert your own reference here if you have one

Impact: choose from the options provided

- Minor Inconvenience
- Affecting Business Performance
- Serious Impact to Business performance
- Service Totally Unavailable

Urgency: choose from the options provided

- Low
- Medium
- High

Item / Version: Not applicable at this point in time. Please provide this information in the details field referenced above. The field may be used in the future.

You have 2 options at this point;

1. To send us the ticket – **click 'Save and Continue'**
2. To add further detail or add an attachment before sending us the ticket - **click 'SAVE'** in the top left hand corner and **follow the instructions in Sections 2.2 and 2.3 below**

In both options your Incident Reference Number will display in the top left hand corner

Once completed successfully your fault details will be assigned to the Civica Service Desk to review, respond and begin work.

New Request

Click on the **'New Request'** icon

If it is not a bug or a software fault, you should use this feature. Here are some examples of items to be logged as requests;

- Requests for Advice and Guidance
- Requests for Information
- Software Enhancements
- Training
- New Customer Self-Serve Portal User Accounts for your establishment

Select the most relevant item from the Service Catalogue list provided that is most aligned to your request.

Click on the **line item (e.g. Training)** which itself acts as a link and opens up a new browser tab, **or the 'Request Service' Button** to the right which opens the page in the browser tab you are using.

When presented with the screen to input your request information you will notice the majority of fields are pre-populated with information, all we require from you are the details relating to your request and in some cases (e.g. Requests for Software Enhancements) some further details justifying the request.

Similar to logging a fault, complete all the fields highlighted in **red as these are mandatory fields**.

In all fields requiring completion, please provide as much information as possible for the Service Desk to successfully triage and reassign the request to a relevant team member.

After completing the required fields you have 2 options at this point;

3. To send us the ticket – **click 'Save and Continue'**
4. To add further detail or add an attachment before sending us the ticket - **click 'SAVE'** in the top left hand corner and **follow the instructions in Sections 2.2 and 2.3 below**

In both options your Incident Reference Number will display in the top left hand corner

If there isn't a relevant item, **select "Ask A Question"**.

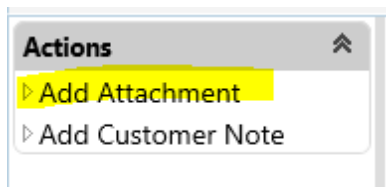
Once completed successfully your fault details will be assigned to the Civica Service Desk to review, respond and begin work.

5.3 Adding an Attachment

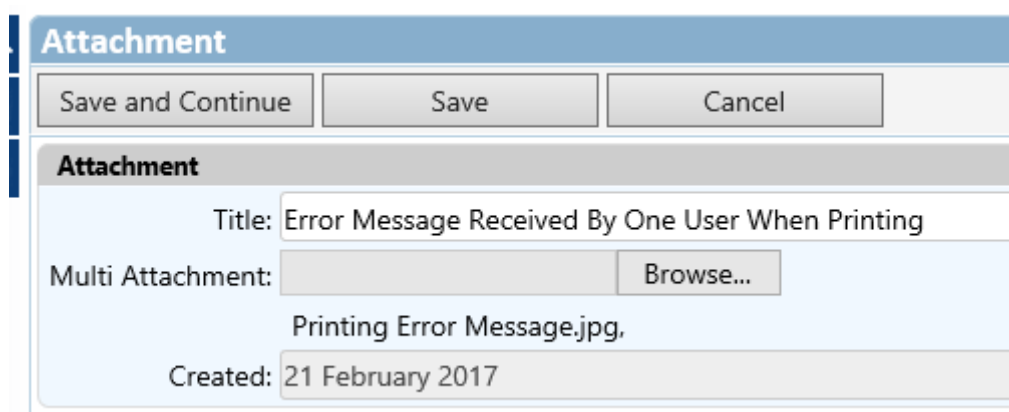
Supporting documentation can be attached once the Fault or Request has been issued a reference number by the System. **Note: there is a file limit of 4MB per document/file**

After selecting “**Save**”, an “**Actions**” panel will open on the top left hand side.

Choose “**Add Attachment**”



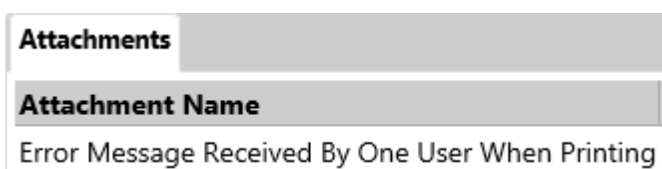
Insert a title to describe what the attachment is or refers to, then browse to the location of your saved attachment to link the document/file.

A screenshot of a web form titled 'Attachment'. At the top, there are three buttons: 'Save and Continue', 'Save', and 'Cancel'. Below the buttons is a section with the title 'Attachment'. It contains a 'Title:' label followed by a text input field with the value 'Error Message Received By One User When Printing'. Below this is a 'Multi Attachment:' label followed by a text input field and a 'Browse...' button. The text 'Printing Error Message.jpg,' is visible below the 'Browse...' button. At the bottom, there is a 'Created:' label followed by a text input field with the value '21 February 2017'.

You can browse and attach multiple attachments.

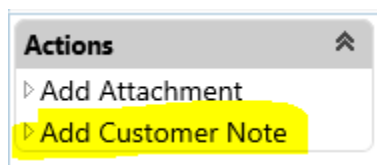
Select “**Save and Continue**”.

To view your attachments, look at the “**Attachments Tab**” which will have appeared at the bottom of the window. Double mouse click on the “**Attachment Name**” and this will allow you to view your document/file.



5.4 Adding a Customer Note

After selecting “**Save**”, an “**Actions**” panel will open on the top left hand side.



Choose “**Add Customer Note**”

Insert the notes into the “**Details**” field.

Details:	This is further information to supplement original details. I can confirm that this error is received by two users i.e. user ABC and user DEF. No other users have reported this issue.
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If you wish to receive a copy of the notes you have just added, select the checkbox “**Send me a copy by Email**”. This checkbox automatically defaults with a check, therefore if you **do not** wish to receive a copy by email, manually uncheck the box.

Send me a copy by Email? <input checked="" type="checkbox"/>
--

Select “**Save and Continue**”

To view all your notes, view the “**Customer Notes Tab**” which will have appeared at the bottom of the window. Selecting this tab will show all of the Customer Notes relating to this Fault/Request. To open a note, simply click on it.

Customer Notes			
Creation Date	Created By	Category	Details
21/2/2017 12:25:02	Paul Jones		This is further information to supplement original details.I can confirm that this error is received by two users ie user ABC and user DEF.I

5.5 Further Information

If you need further assistance or help using the self-service support portal please contact the Service Desk.

6 Service Desk Contact Details and Further Information

Service Desk	Service Desk Contact Details
Education Customer Support	Telephone: 1300 550 062 Email: educationsupport@civica.com.au Support Website: http://civicaeducation.com.au
Library Customer Support	Telephone: +61 3 8676 4415 Email: info@civicalld.com Spydus Online Help : https://yourlibraryurl.spydus.com/#WelcomeToCivicaHelp.html
All Customers Self-Service Portal	https://servicedesk.civica.co.uk/SelfService/ss/

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