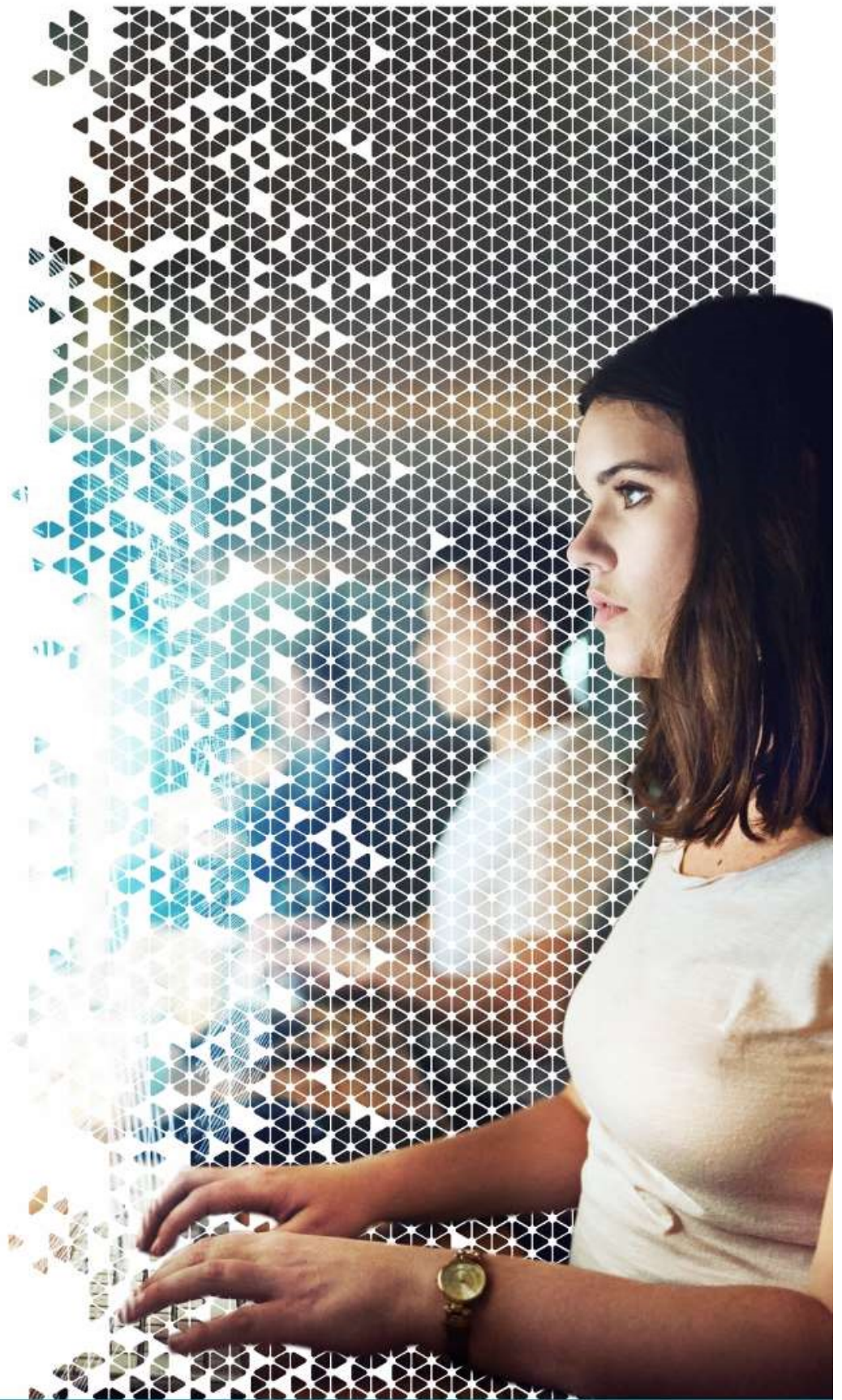


# CIVICA

Transforming the way you work



## Civica Service Desk

Self Service User Guide

## Contents

Contents .....	2
1 Introduction to the Civica Service Desk Application .....	4
1.1 Logging into the Civica Service Desk Application .....	4
1.2 The Self Service Navigation Bar .....	5
2 The Self Service Home Page .....	6
2.1 The Knowledge Search Section .....	6
2.1.1 Performing a Knowledge Search .....	7
2.2 The My Active Tickets Window .....	9
2.2.1 Expanding the View .....	10
2.3 Quick Actions .....	10
3 Faults (Incidents) .....	11
3.1 Logging and Saving your Fault .....	11
3.1.1 Logging a Fault (Incident) .....	11
3.1.2 Saving the Details .....	12
3.1.2.1 Save and Continue .....	12
3.1.2.2 Save .....	12
3.1.2.3 Cancel .....	12
3.1.3 Understanding the Incident Details Attribute Fields .....	13
3.2 Updating your Fault (Incident) .....	14
3.2.1 Cancelling your Fault (Incident) .....	14
3.2.2 Adding Notes to a Fault (Incident) .....	15
3.2.3 Attaching Documents to a Fault (Incident) .....	16
3.2.4 Viewing/Updating Attachments .....	17
4 Requests .....	18
4.1 Requesting an Item .....	18
4.2 Understanding the Request Attribute Fields .....	19
4.3 Saving the Details .....	20
4.3.1 Save and Continue .....	20
4.3.2 Save .....	20
4.3.3 Cancel .....	20
4.4 Tracking Progress of your Request .....	21
5 Searching for Incidents and Requests .....	22
5.1 Accessing the Search Facilities .....	22
5.2 The Search Criteria .....	23
5.3 Grouped Results .....	23
5.4 Paging Through the Results List .....	23
5.5 Sorting the Results List .....	24
6 My Profile .....	25
6.1 My Details .....	26
6.2 My Groups .....	26

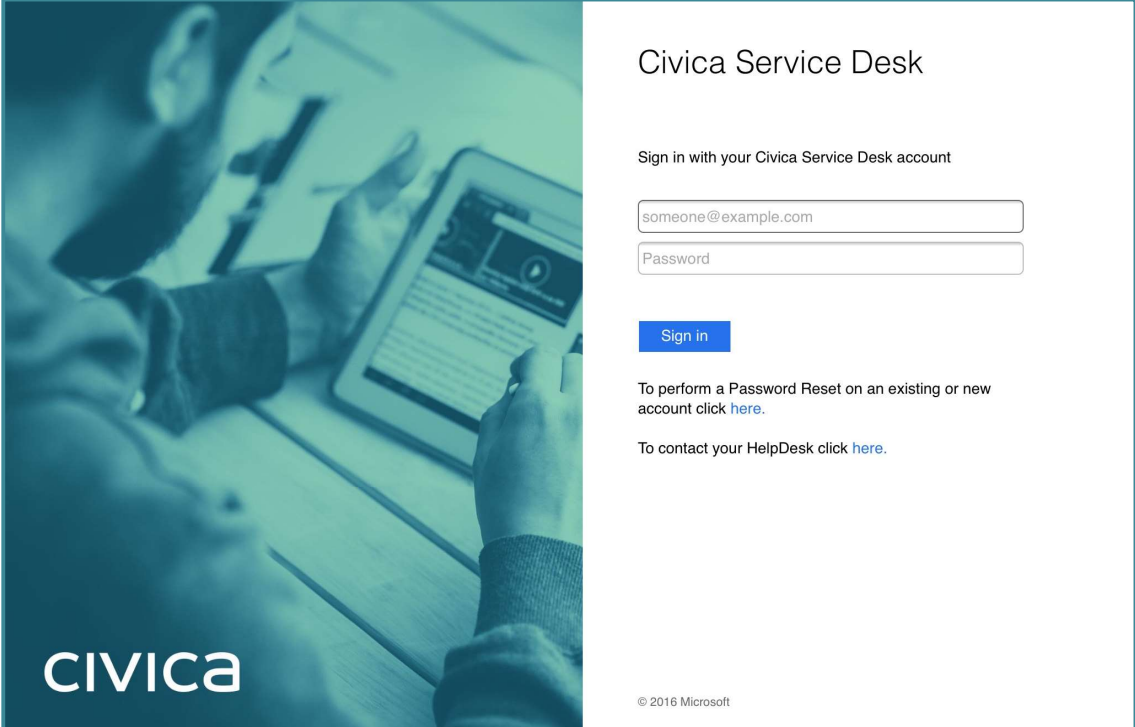
6.3	Reset your Password .....	26
6.4	My Ticket History.....	27
7	My Group Profile .....	28
7.1	Active Tickets .....	29
7.2	Completed Tickets .....	29
8	My Management Profile .....	30
8.1	Our Users .....	30
8.2	Ticket Counts .....	31
Appendix A: Glossary of Terms .....		32
Appendix B: Keyboard Shortcuts .....		33
Appendix C: Process Stages and Icons.....		34
Incident Icons and Stages .....		34
Request Icons and Stages .....		35
Problem Icons and Stages .....		36
Appendix D: Resetting your Password .....		37

# 1 Introduction to the Civica Service Desk Application

## 1.1 Logging into the Civica Service Desk Application

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

- ▶ Open your web browser and navigate to <https://servicedesk.civica.co.uk/selfservice/ss>
- ▶ The Self Service Login Page displays similar to the example below



Civica Service Desk

Sign in with your Civica Service Desk account

someone@example.com

Password

Sign in

To perform a Password Reset on an existing or new account click [here](#).

To contact your HelpDesk click [here](#).

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- ▶ Type in your **User Name** and **Password** in the appropriate fields
- ▶ Click the **Sign In** button
- ▶ The Self Service Home Page will display

## 1.2 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.



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





## 2 The Self Service Home Page

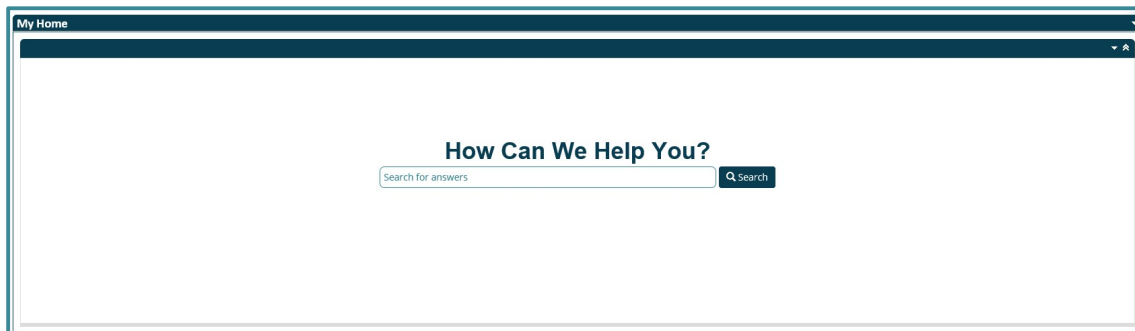
Now that you have logged in you are presented with the **Self Service Home Page**, which is populated with various functional / informative windows. Each of these windows are described in the following sections.

### 2.1 The Knowledge Search Section

The **Knowledge Search Section** enables you to tell us what your issue is, or what you need and be presented with a number of knowledge articles which may be able to help your issue.

If any related knowledge articles do not help, or if no results are returned you will be presented with links to enable you to

- ▶ **Log a new fault** – record a new fault on the system for Civica to attend to
- ▶ **Raise a request** – The service catalogue will allow you to request a large range of items, for example:
  - Software Enhancements
  - Consultancy Days
  - Delivery of New Services

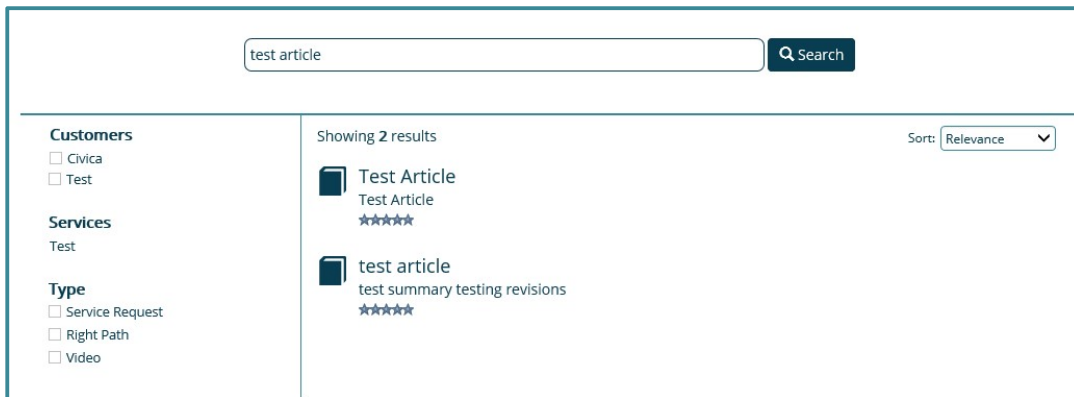


### 2.1.1 Performing a Knowledge Search

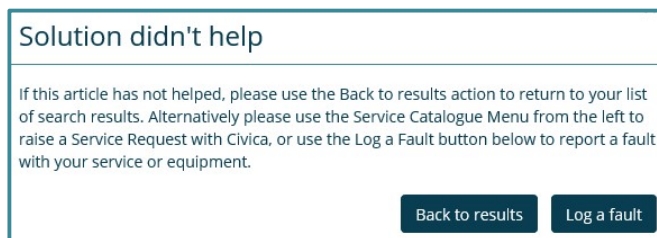
If you need to tell us about a fault with your service, or request new equipment or services, we may have some information already to hand in our new knowledge management area within Civica Service Desk.

This will enable you to Self-Serve more effectively, or have the exact details to hand telling you about the level of information we need if you need to report something to us, to be able to help you more efficiently.

- ▶ Type in your Issue in the Search Bar, and click Search
- ▶ Articles are returned in order of relevance to your search term, and will appear with a title and summary so you can choose the appropriate one for your issue



- ▶ You can view one, or a number of the articles returned, using the back button on your browser, or the back link within the article to return to the search results
- ▶ You can filter these articles based on the services we provide and if you look after a number of departments of companies within a consortium, you can also filter these articles based on the Civica Customers you belong to
- ▶ After reading an article, you'll be asked to confirm whether or not it helped. Your feedback will allow us to make improvements for the future
- ▶ Clicking the **green** 'Yes' button lets us know that the article helped and you were able to resolve your issue. You'll then be returned to the home page to begin a new search or close the portal
- ▶ Clicking the **red** 'No' button will give you information on what to do next and provide us with a notification that the article content wasn't suitable



- ▶ In the unlikely event that we don't have a knowledge article on your specific issue, then you'll see information on what to do next to get your issue resolved

To Request a New Service or Amend an Existing Service please use the Service Catalogue from the left hand menu or use the link below. Otherwise, to report a fault with your service or equipment please click on the below link.

[Log a Fault](#)

[Raise a Request](#)

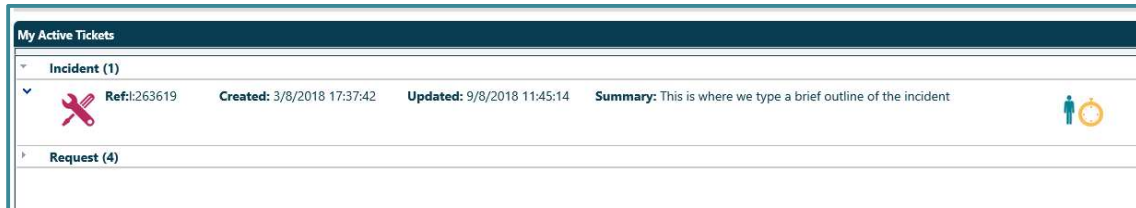
- ▶ A link to log a fault will be displayed directly underneath this information if required, which will direct you to the log a fault form
- ▶ If it's a service you require, either select the Raise a Request Link, or use the 'Service Catalogue' menu on the left hand side of the screen




## 2.2 The My Active Tickets Window


The **My Active Tickets** section shows a summary of your open Tickets, which includes Incidents, Problems and Requests.

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



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

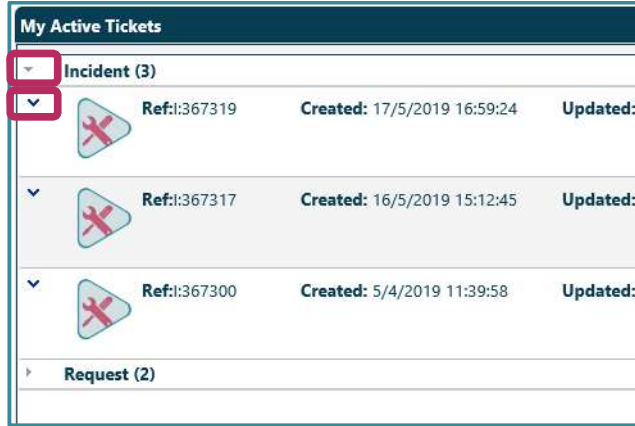
- ▶ An icon on the left depicting if the issue is being treated as an Incident or a Problem
  - 

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**)

### 2.2.1 Expanding the View

- ▶ Click the grey chevron on the left of the collapsed list to display all incidents, requests or problems contained



- ▶ Click the Blue Chevron to expand the amount of information for each single ticket as required



- ▶ To full open a specific Incident simply click on it

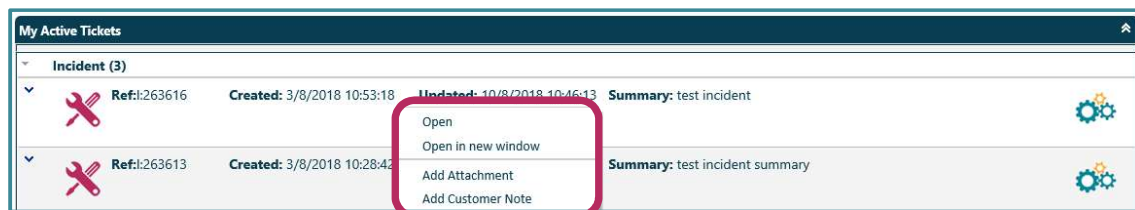
*Note: If you wish to find a specific ticket that may have been closed, you can use the Search features detailed later in this document*

*(See Searching for Incidents and Requests in Section 4)*

### 2.3 Quick Actions

You can **Open**, **Add Notes** to and **Add Attachments** to tickets very quickly from **Self Service Home Page** by using a **Right Mouse Click** on the relevant ticket.

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



### 3 Faults (Incidents)

Incidents are events that are not part of the standard operation of a service, which compromise, or potentially compromise, the quality of that service.

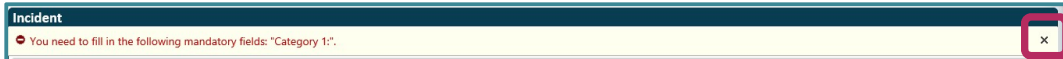
Incident management is about restoring the standard operation of a service to you, the customer, as quickly as possible within agreed timescales.

#### 3.1 Logging and Saving your Fault

##### 3.1.1 Logging a Fault (Incident)

If you have been unable to locate relevant information within the knowledge search and need to log a fault to Civica, 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.

- ▶ The **Log a Fault** link appears when our articles have been unhelpful, or your searches have returned no results. Once you click on the link, the **Incident** screen will display
- ▶ On this screen here you are presented with a small number of fields, and will need to complete any mandatory fields (shaded in pink) before you can save the ticket  
(See [Understanding the Incident Details Attribute Fields in section 3.1.3](#))
- ▶ 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



- ▶ 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

**Incident**

Save and Continue Save Cancel

To comply with information handling best practice and data protection regulations, please ensure that only non-sensitive business related information is entered in to Civica Service Desk. Civica Group reserves the right to remove any non-business information from its systems.

**Organisation/Customer**

Organisation: Civica Customer: Civica Training Customer

**Incident Details**

Summary: This is where you enter a brief summary of the fault

Details: This is where you can provide full details and any error messages.  
You can also paste small screen snips in here.

Service: Civica Service Desk Training Service Customer Ref:

Category 1: Software Impact: Minor Inconvenience

Category 2: Cat 2 Urgency: Low

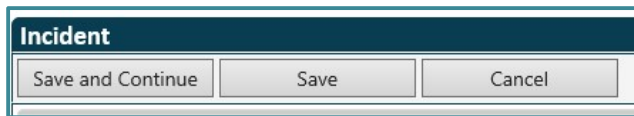
Category 3: Cat 3

**Information**

Status: Open Created: 25 July 2019 12:45:32 Updated: 25 July 2019 12:45:32

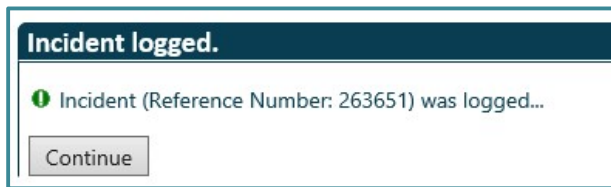
### 3.1.2 Saving the Details

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



#### 3.1.2.1 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 **Service Desk Home Page**

#### 3.1.2.2 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

#### 3.1.2.3 Cancel

This will return you to the **Service Desk 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.

---

### 3.1.3 Understanding the Incident Details Attribute Fields

The Incident Details window may contain any of the following attributes - **(M)** = Mandatory Field

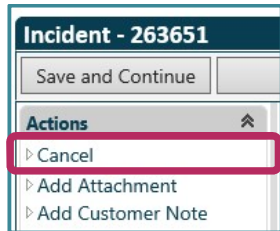
<b>Summary (M)</b>	A brief outline of the issue
<b>Details (M)</b>	A detailed explanation of the issue. You should provide as much information as possible to help Civica resolve the issue quickly and effectively
<b>Service (M)</b>	The service you are raising the issue against. The service acts like a top level category that will route your issues to the appropriate team within Civica
<b>Categories (M)</b>	Categories enable you to pinpoint your issue so that we can manage the Incident more effectively and automatically assign Incidents to best team within Civica who are equipped to deal with a particular type of issue.
<b>Impact (M)</b>	<b>A combination of Impact and Urgency are used to determine the priority of your issue.</b> Definitions for these, along with the timescales for resolving issues will be defined by the SLA's within your organisations contract with Civica. The Impact options are: <b>Minor Inconvenience</b> <b>Affecting Performance</b> <b>Serious Impact on Performance</b> <b>Service Totally Unavailable</b>
<b>Urgency (M)</b>	<b>High</b> <b>Medium</b> <b>Low</b>
<b>Customer Ref</b>	This field is for you to record your own unique reference number. This may be the number of a related call in your own service management tool.
<b>Clinical Safety Checkbox</b>	Trigger to enable the Clinical Safety text field to appear (This may not be applicable to all Civica Customers)
<b>Environment</b>	The Environment field is used to identify the system you are experiencing the fault on. For instance Test or Live (This may not be applicable to all Civica Customers)
<b>Item / Version</b>	This field is used to identify a specific piece of hardware or the version of software you are using (This may not be applicable to all Civica Customers)

## 3.2 Updating your Fault (Incident)

### 3.2.1 Cancelling your Fault (Incident)

If you have raised your fault in error, or the issue has resolved itself. For a short time following raising your fault, you have the option to cancel it.

- ▶ Click Cancel



- ▶ Enter a summary of why you are cancelling into the Cancellation Summary (This is mandatory)
- ▶ If further explanation if necessary, you can add further information into the details section
- ▶ This information will then be e-mailed to the Civica Analyst currently assigned to your fault and the incident record will be **closed** as **cancelled**



### 3.2.2 Adding Notes to a Fault (Incident)

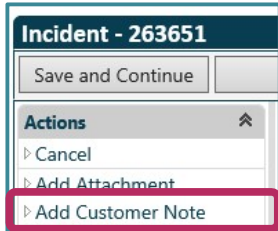
Both Customers and Civica Analysts can add Notes (called Customer Notes) to an Incident to help record useful information as the Incident progresses.

For instance, a Civica Analyst may require further information on an issue that has been logged.

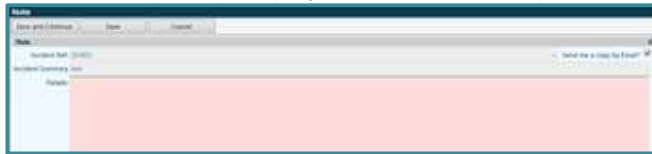
A copy of this request for information will be recorded in the Customer Notes.

You can then use the **Add Customer Note** action on the Incident Screen to send your reply.

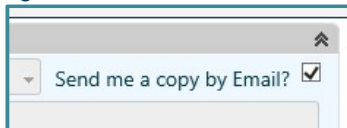
- ▶ From the **Incident** screen click on **Add Customer Note** in the **Actions** section



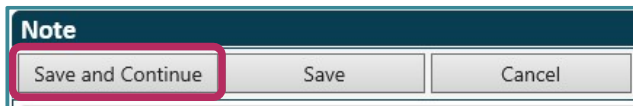
- ▶ The **Note** screen will display similar to the example below



- ▶ 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
- ▶ The system will automatically send you a copy of the note via e-mail, if you do not want to receive an email copy of your note un-check the **Send me a copy by Email** box on the top right hand corner of the Note Window



- ▶ Click the **Save and Continue** button to save the Note and to return to the **Incident** screen



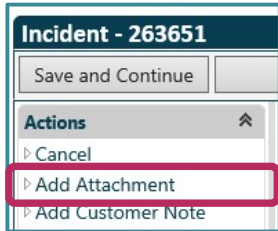
- ▶ A **Customer Notes** Tab will appear at the bottom of Incident Window. Clicking on this Tab will show all of the Customer Notes relating to this Incident. To open a Note simply click on it

Creation Date	Customer Note Category	Customer Note Details
16/8/2018 15:32:44		test
16/8/2018 15:24:30		Type the full details of the note possible to help Ci....

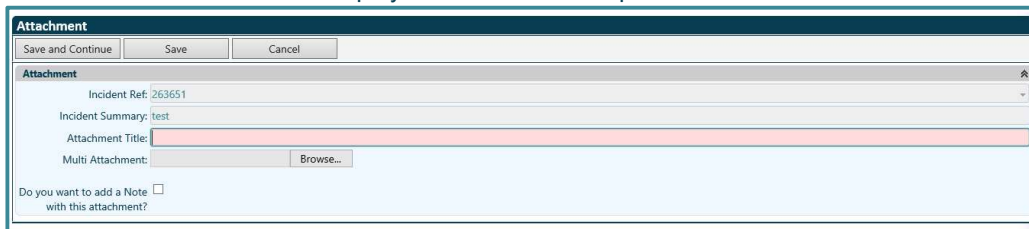
### 3.2.3 Attaching Documents to a Fault (Incident)

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.

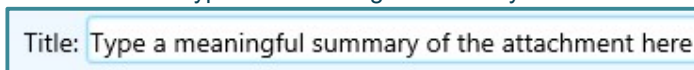
- ▶ From the **Incident** screen click on **Add Attachment** in the **Actions** section



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



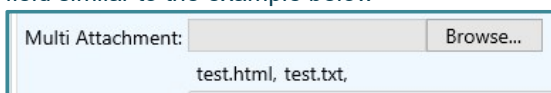
- ▶ In the **Title** field type in a meaningful summary of the attachment



- ▶ Click the **Browse** button and then navigate to the required document (you can select more than one attachment at a time)



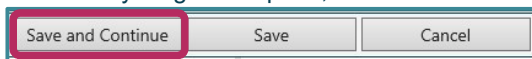
- ▶ Once you have selected the required attachments they will display in the **Multi Attachment** field similar to the example below



- ▶ At this point, if you only want to add the attachments, you can click on Click **Save and Close**

- ▶ However, should you want to add further details, click the “Do you want to add a note with this attachment” box, which presents an additional section within the Attachment window, allowing you to enter a Customer Note, which will be added to the ticket when you **Save and Close**

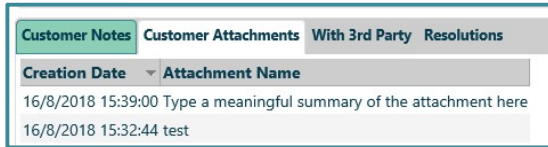
- ▶ Once everything is complete, Click **Save and Continue**



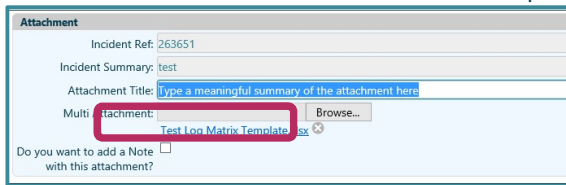
- ▶ An **Attachments** Tab will now appear at the bottom of the Incident window. Clicking on the Tab will display all of the Attachments relating to this Incident

### 3.2.4 Viewing/Updating Attachments

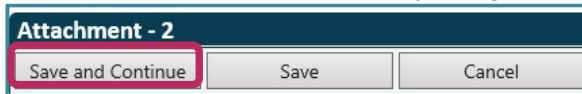
- ▶ From the **Incident** screen click on the **Attachments** Tab and click on the appropriate Attachment



- ▶ The **Attachment** screen will display
- ▶ 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.



- ▶ 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
- ▶ Click **Save and Continue** to save any changes



## 4 Requests

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

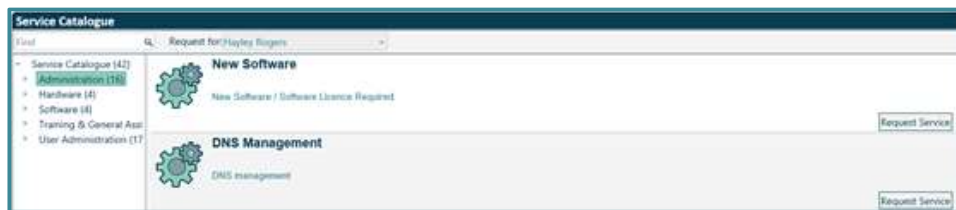
Some items might have a fixed value, for instance a Laptop, other items might be free of charge (for instance, setting up a new user on the system), and other items might require a bespoke quotation.

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

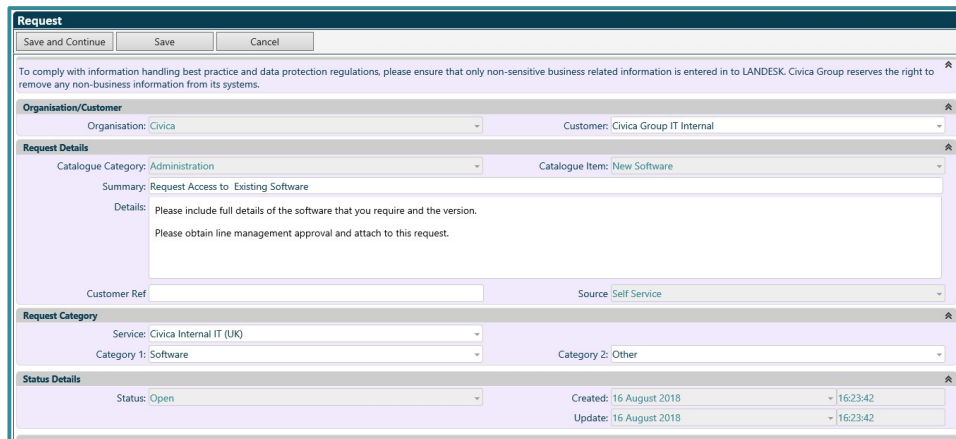
*Note: This section assumes that you are familiar with the interface and common fields*

### 4.1 Requesting an Item

- ▶ The **Raise Request** link appears when our articles have been unhelpful, or your searches have returned no results. Once you click on the link, the **Service Catalogue** will display



- ▶ You can filter the results returned in the catalogue screen by clicking on the relevant menu i.e. Administration or Software
- ▶ Determine which request item you require, and select it by pressing the **Request Service** button and the Request screen will display.
- ▶ You need to complete the required fields, although many are pre-populated for you.  
(Please see [Understanding the Request Attribute Fields](#) in section 4.2)



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

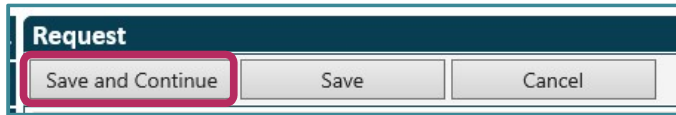
## 4.2 Understanding the Request Attribute Fields

The Request window may contain any of the following attributes - **(M)** = Mandatory Field:

<b>Summary (M)</b>	Should contain a summary of what you are requesting <i>(May be pre-populated with some information)</i>
<b>Details (M)</b>	Should contain as much information as possible to allow our Agents to understand what you are requesting. <i>(May be pre-populated with some prompts asking you for information)</i>
<b>Service (M)</b>	Please select the relevant service that this request is related to, if this is not already pre-populated <i><b>Note:</b> Unless you are using Ask a Question – this field will automatically pre-populate</i>
<b>Categories (M)</b>	<i>These fields will be pre-populated based on the Item you are Requesting.</i>
<b>Customer Ref (Optional)</b>	This field is for you to record your own unique reference number against the call.
<b>Justification (Mandatory if Visible)</b>	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

### 4.3 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.



#### 4.3.1 Save and Continue

This will save the Request and on the next screen will inform you of the Reference Number. Clicking Continue will then take you to the **Service Desk Home Page**

#### 4.3.2 Save

This will save the Request 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

#### 4.3.3 Cancel

Will return you to the **Self Service Home Page** without recording the Request

---

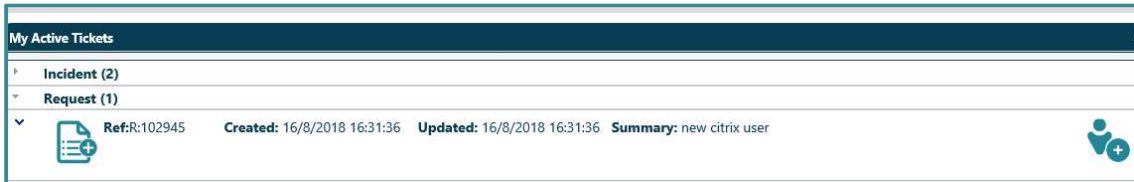
*Note: On occasion these buttons are hidden by an error message, for example if you have previously tried saving the request without completing all of the mandatory fields. You can clear the error by clicking on the X on the right hand side of the error message box.*

---

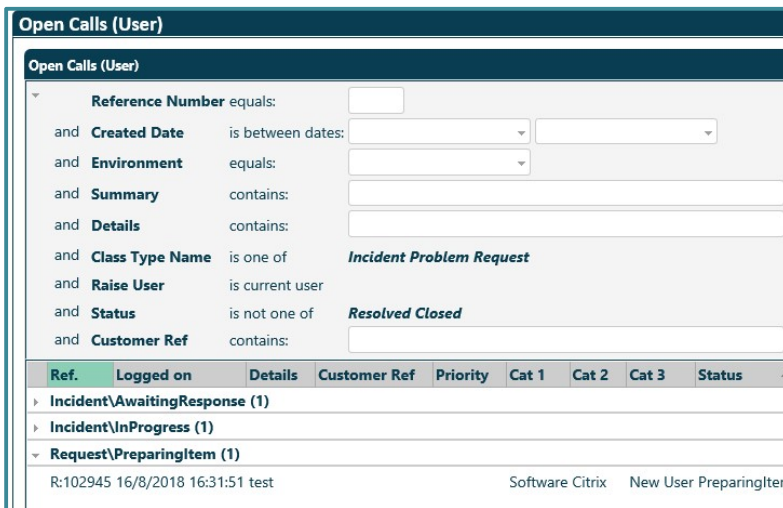


### 4.4 Tracking Progress of your Request

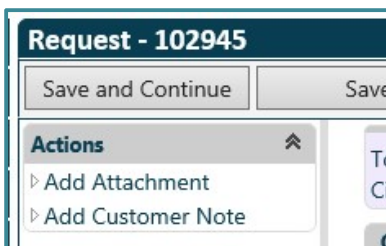
You can track the progress of your Requests by looking through the list on the **Self Service Home Page** underneath your Active Ticket as shown in the example below



Or by using the **Search** facilities described in section 5.



You can add Customer notes to the request by opening it and selecting **Add Customer Note** or **Add Attachment** from the **Actions Section** in exactly the same way as with Incidents



## 5 Searching for Incidents and Requests

Civica Service Desk provides the ability for you to search all of your Incidents, Problems and Requests - Open, Resolved and Closed.

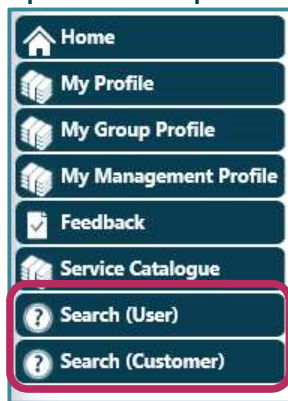
There are different **Search** buttons depending on your role and permissions.

Search (User) allows you to search and view all calls that you have logged personally

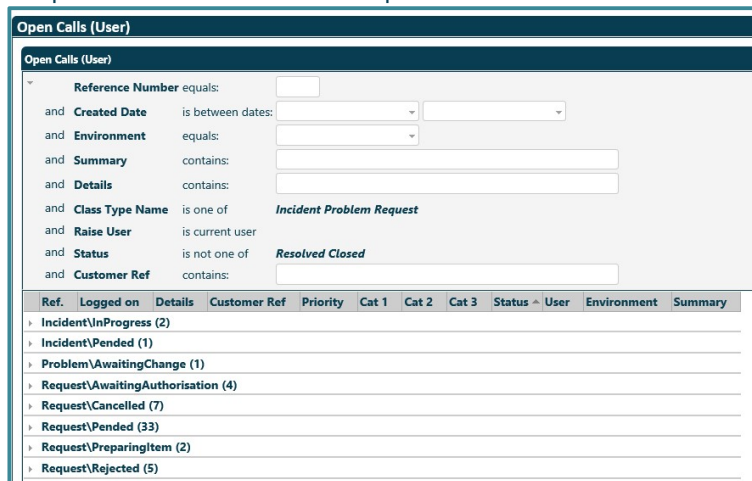
Search (Customer) allows you to view all calls that have been logged by yourself or any colleagues the same organisation.

### 5.1 Accessing the Search Facilities

- ▶ 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



## 5.2 The Search Criteria

The **Search Criteria** 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 Date range** – filters the results based on the time period
- ▶ **Environment** – filters based on the environment entered (This is an optional field based on category)
- ▶ **Summary** – 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
- ▶ **Customer Ref** – Search by the unique reference you provided to us

Once you have completed the relevant search fields press **Enter** to display all of the results matching the information that you have entered

## 5.3 Grouped Results

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

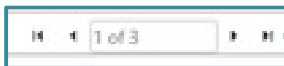
- ▶ Click the arrow to the left of the Group you wish to expand
- ▶ The select Group will expand similar to the example below

Ref.	Logged on	Details	Customer Ref	Priority	Cat 1	Cat 2	Cat 3	Status	User	Environment	Summary
▶ Incident\InProgress (2)											
i:263613	3/8/2018 10:29:28	test incident details		4	Software	Cat 2	Cat 3	InProgress	Hayley Rogers		test incident summary
i:263616	3/8/2018 10:54:05	test incident		1	Hardware	Cat 2	Cat 3	InProgress	Hayley Rogers		test incident
▶ Incident\Pended (1)											
▶ Problem\AwaitingChange (1)											
▶ Request\AwaitingAuthorisation (4)											

- ▶ To open any of the tickets, simply click on the result and the relevant ticket will open for you.

## 5.4 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 top of the section you have expanded within the list of results.



- ▶ ⏪ 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



### 5.5 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 **Logged On** in a **Descending** order

Ref.	Logged on	Details	Customer Ref	Priority	Cat 1	Cat 2	Cat 3	Status	User	Environment	Summary
P:17150	10/8/2018 10:32:29	test incident details			Software	Cat 2	Cat 3	AwaitingChange	Hayley Rogers		test incident summary
R:102870	8/8/2018 15:57:41	test		4	Request	LANDesk Data	Workbook Amendments / Imports	PreparingItem	Hayley Rogers		test
R:102854	3/8/2018 10:54:43	test			Software	Cat 2	Cat 3	Cancelled	Hayley Rogers		test

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

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

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

Ref.	Logged on	Details
P:17150	10/8/2018 10:32:29	

Sort ascending

Sort descending

*Note: The grouping of tickets by status will be removed when sorting results in this way.*

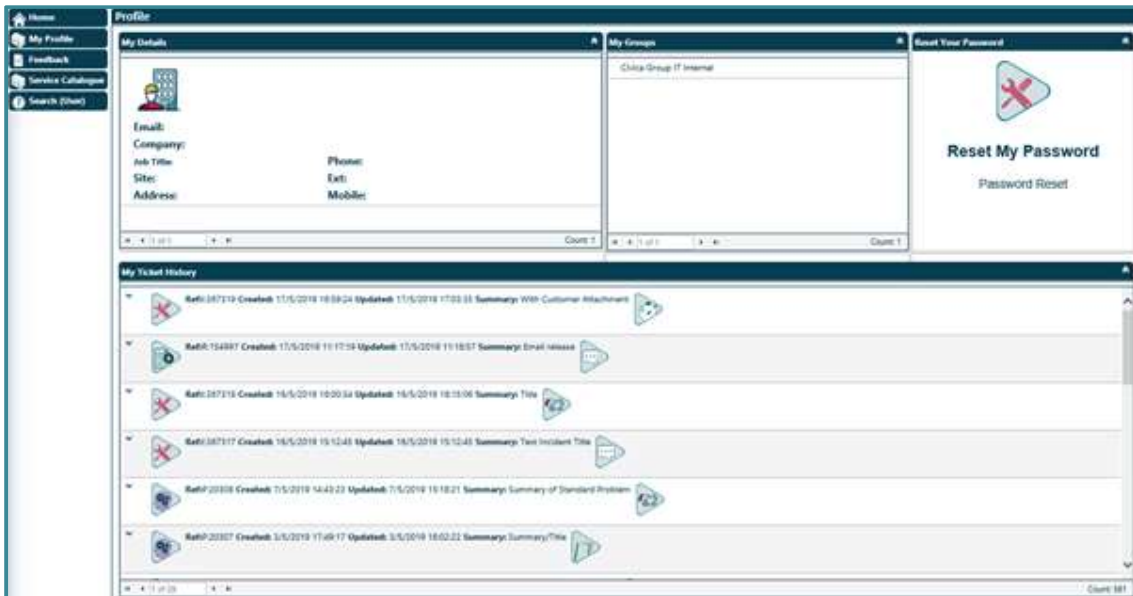
## 6 My Profile

Selecting **My Profile** from the **Self Service Home Page** takes you to a dashboard that shows details specifically against your profile

Click the **My Profile** button



The **Profile** screen will display similar to the example below, with your details displayed in the My Details area.



## 6.1 My Details

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



If any of the information here is incorrect, you can request for it to be updated via your service delivery representative.

## 6.2 My Groups

This identifies which organisation(s) you are associated with on the Civica Service Desk system



If you are able to log faults and requests for more than one organisation, they will all appear here.

## 6.3 Reset your Password

You are able to reset your password via this link, this will follow the actions described in Appendix D.



In order to ensure there are no issues logging or saving data it is recommended that you log off Civica Service Desk after you have carried out this action, and log back into the Service Desk System with your new credentials once you have reset your password



## 6.4 My Ticket History

A record of all your open and closed Incidents and Requests

My Ticket History	
 	<b>Ref:367319 Created: 17/5/2019 16:59:24 Updated: 17/5/2019 17:03:35 Summary: With Customer Attachment</b> 
 	<b>Ref:R:154997 Created: 17/5/2019 11:17:19 Updated: 17/5/2019 11:18:57 Summary: Email release</b> 
 	<b>Ref:367318 Created: 16/5/2019 16:00:34 Updated: 16/5/2019 16:15:06 Summary: Title</b> 

As with other areas of the application, you can use the arrow icons to display more or less information.

## 7 My Group Profile

**Note:** This option is only available to **Customers with Supervisor Access**

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

Click the **My Group Profile** button



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

Group Profile	
<b>Active Tickets</b>	
>	Incident (252)
>	Problem (32)
>	Request (518)
<b>Completed Tickets</b>	
>	Incident (31453)
>	Problem (208)
>	Request (29645)

### 7.1 Active Tickets

A list of all open Incidents, Problems and Requests

This area will display all active tickets for all organisations you are a member of.

Group Profile				
Active Tickets				
Incident (160)				
Problem (64)				
Request (329)				
	Ref:R:154999	Created: 17/5/2019 11:53:25	Updated: 17/5/2019 11:53:25	Summary: Administration - Account - 3rd Party Support Access - Network Account
	Ref:R:154997	Created: 17/5/2019 11:17:19	Updated: 17/5/2019 11:18:57	Summary: Email release

As with other areas of the application, you can use the arrow icons to display more or less information.

You can also left click on the ticket, and it will open for you for further review or action, or right click to access any quick actions available.

### 7.2 Completed Tickets

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

This area will display all closed tickets for all organisations you are a member of.

Completed Tickets				
Incident (38820)				
Problem (287)				
Request (41654)				
	Ref:R:154980	Created: 1/5/2019 10:51:25	Updated: 14/5/2019 14:27:21	Summary: Remote Access
	Ref:R:154866	Created: 18/3/2019 22:58:16	Updated: 14/5/2019 14:28:38	Summary: Restore Access for a CSD End User

As with other areas of the application, you can use the arrow icons to display more or less information.

You can also left click on the ticket, and it will open for you for further review or action

## 8 My Management Profile

*Note: This option is only available to Customers with Manager Access*

Selecting **My Management Profile** from the **Self Service Home Page** will take you to a dashboard that show graphical and count information against various ticket types recorded against your organisation.



This will display a dashboard with multiple ticket counts and displays.

### 8.1 Our Users

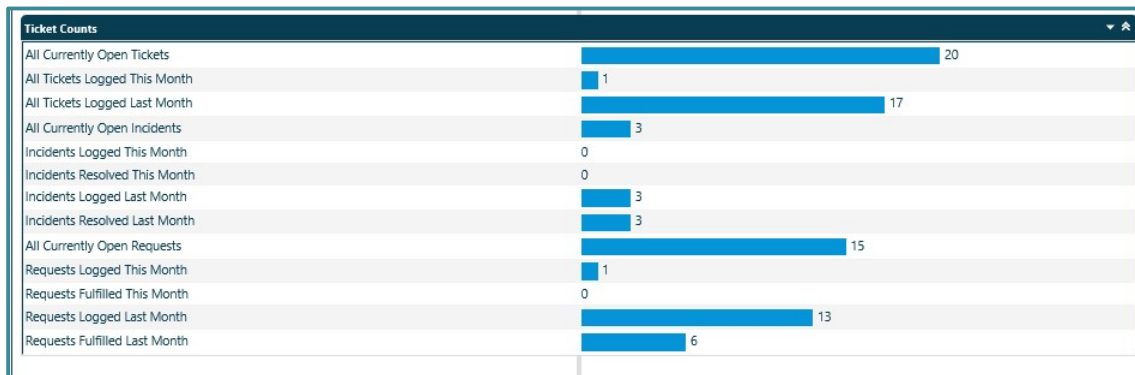
A list of users associated with all Organisations you are linked to. These will display in a manner similar to the My Profile area, and if an individual is linked to more than one customer, you will clearly see multiple entries allowing you full visibility.

*(Names have been redacted from the below screenshot)*



## 8.2 Ticket Counts

Various Summaries of Information for all the Organisations you are linked to



## Appendix A: Glossary of Terms

<b>Analyst</b>	Often called an Agent, this is a Civica Staff member who is responsible for managing your ticket.
<b>Category</b>	One of a set of pre-established classifications an event may be assigned to, such as “hardware”, “software” or “network”. Categories can be defined for logging / classification and closing / root cause.
<b>Incident</b>	Any event which is not part of the standard operation of a service and which causes, or may cause an interruption to, or reduction in, the quality of that service.
<b>Problem</b>	Unknown underlying cause of one or more incidents. A condition of an IT infrastructure that is identified through incidents with similar symptoms or a significant incident that is indicative of an error of which the cause is not yet known.
<b>Service Catalogue</b>	A list of IT services available to request.
<b>Service Request</b>	A request for access to a service or delivery of an item as defined within the Service Catalogue.
<b>SLA</b>	A written agreement between the service provider and its customer(s) that documents agreed service levels.
<b>Configuration Item</b>	Component of an infrastructure – or an item, such as a computer, laptop or a single software licence key.

## Appendix B: Keyboard Shortcuts







While using the Civica Service Desk Application, you can use the keyboard to navigate your way around the user interface.

There are a number of Windows keyboard shortcuts that are available for frequently used tasks.

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










## Appendix C: Process Stages and Icons

### Incident Icons and Stages


Icon	Status Name & Description
	<p><b>Awaiting Response</b> – The Incident has been recorded on the system and is waiting for a Civica Analyst to review it.</p>
	<p><b>In Progress</b> – Your Incident has been reviewed and is now being managed.</p>
	<p><b>With Customer</b> – 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.</p>
	<p><b>With 3<sup>rd</sup> Party</b> – Your issue has required the help from a 3<sup>rd</sup> Party organisation (for instance a Telecommunications provider).</p>
	<p><b>Resolved</b> – The Incident ticket has been resolved and is closed from the customer's perspective.</p>
	<p><b>Closed</b> – The Incident ticket has been closed from the Analyst's perspective</p>



### Request Icons and Stages

Icon	Status Name & Description
	<b>Awaiting Authorisation</b> – Request have to be authorised before they can proceed. Each type of request can have different levels of authorisation.
	<b>Stock Check</b> – We now have a plan of action and are carrying out the investigative work to identify for the root cause.
	<b>Awaiting Availability</b> – We are waiting for stock to become available.
	<b>Provisioning</b> – We have identified the root cause of the problem and need to implement a change.
	<b>With Customer</b> – 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.
	<b>User Sign Off</b> – We believe the request has been fulfilled, but have asked you to confirm the request is fulfilled.
	<b>Rejected</b> – Your request has been rejected.
	<b>Cancelled</b> – Your request has been cancelled.
	<b>Subscribed</b> - Your request has been completed successfully.
	<b>Closed</b> - Your request has been completed successfully.

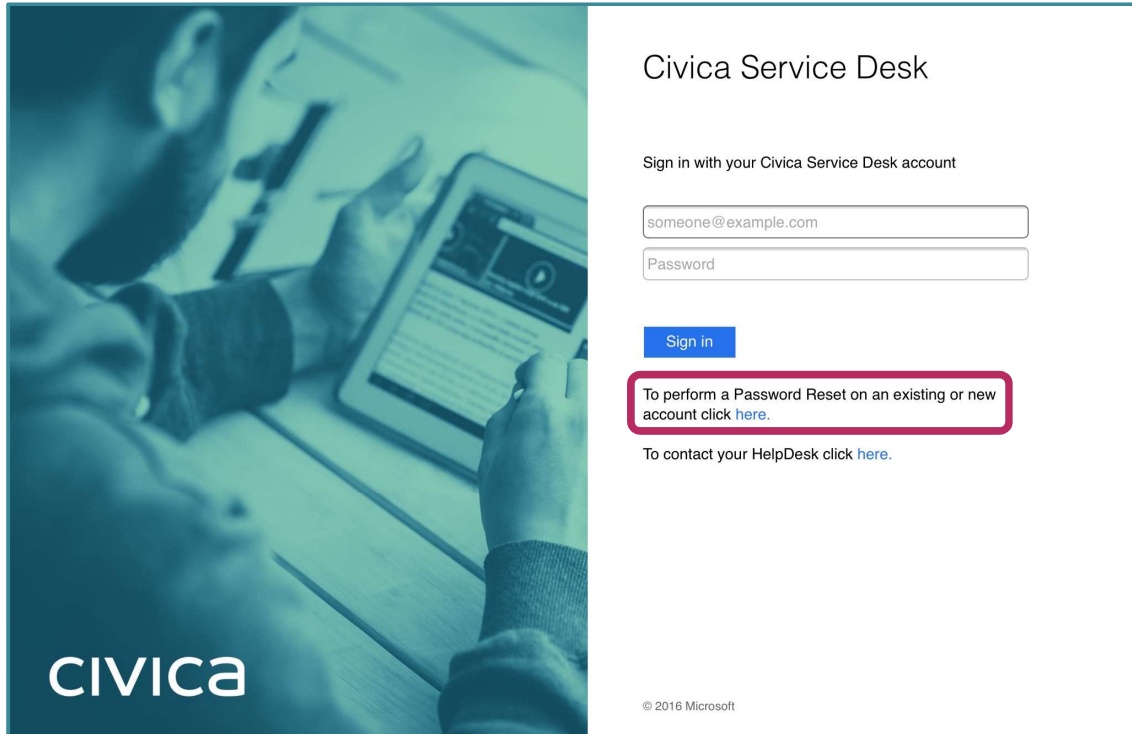
**Problem Icons and Stages**

Icon	Status Name & Description
	<p><b>Discovery</b> – 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.</p>
	<p><b>Plan in Progress</b> – We now have a plan of action and are carrying out the investigative work to identify the root cause.</p>
	<p><b>Awaiting Change</b> – We have identified the root cause of the problem and need to implement a change.</p>
	<p><b>Known Error</b> – The Problem has been identified and is now classified as a Known Error.</p>
	<p><b>With Development</b> – A solution to the problem is currently being developed and implemented.</p>
	<p><b>Monitoring</b> – We believe the problem has been resolved, but are carrying out a period of monitoring to check it doesn't re-occur.</p>
	<p><b>Resolved</b> – The Problem record has been resolved from the customer's perspective.</p>
	<p><b>Closed</b> – The Problem record has been closed by the analyst.</p>

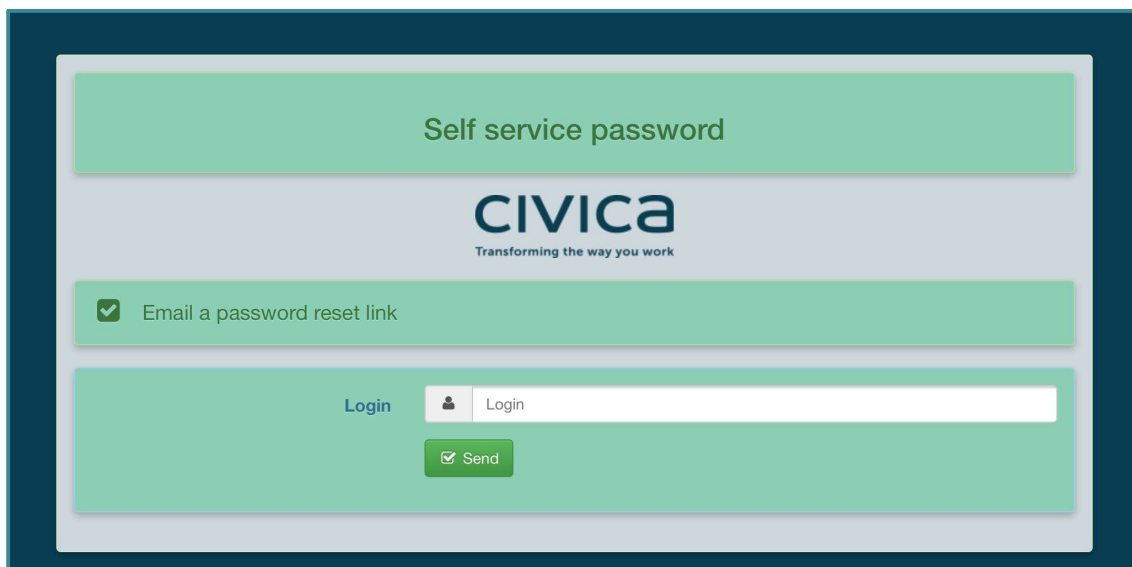
## Appendix D: Resetting your Password

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 **Password Reset Link** as shown below



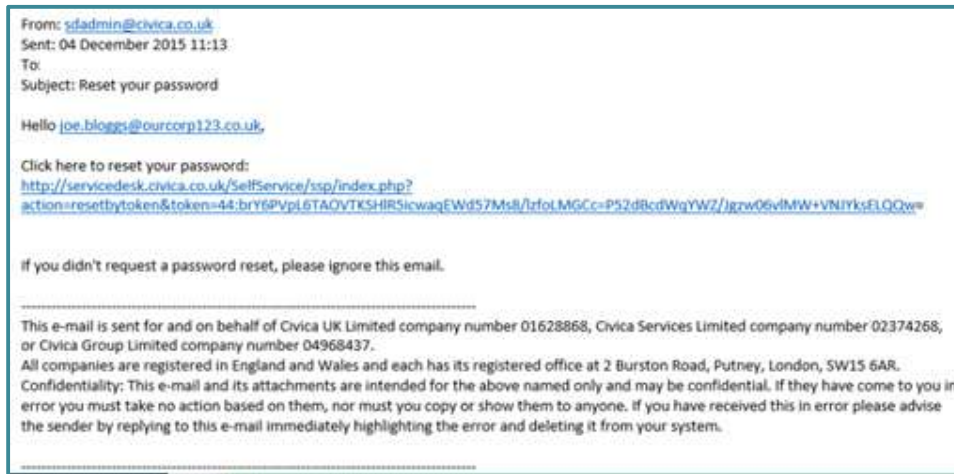
This will take you to the Password Reset Function, your **Login (UserName)** will be your work email address, for example: [joe.bloggs@ourcorp123.co.uk](mailto:joe.bloggs@ourcorp123.co.uk) and then click the **Send** button



If you have entered your details correctly, 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 within 1 hour of requesting it, 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



Once you have clicked the link in the email you will be taken to a screen to enter a new password, 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 can now close the window and try logging into the Service Desk again.