

CIVICA

Transforming the way you work



Civica Self-Service Support Portal

Customer User Guide

February 2020

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1 Introduction

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

PLEASE NOTE:

Any diagrams and illustrations used in this guide may be taken from a test / training system and may vary to the images on the actual Civica Self Service Support Portal. They are provided to help you recognise the part of the System you are using.

1.1 Supported Web Browsers

The list of support browsers are as follows:

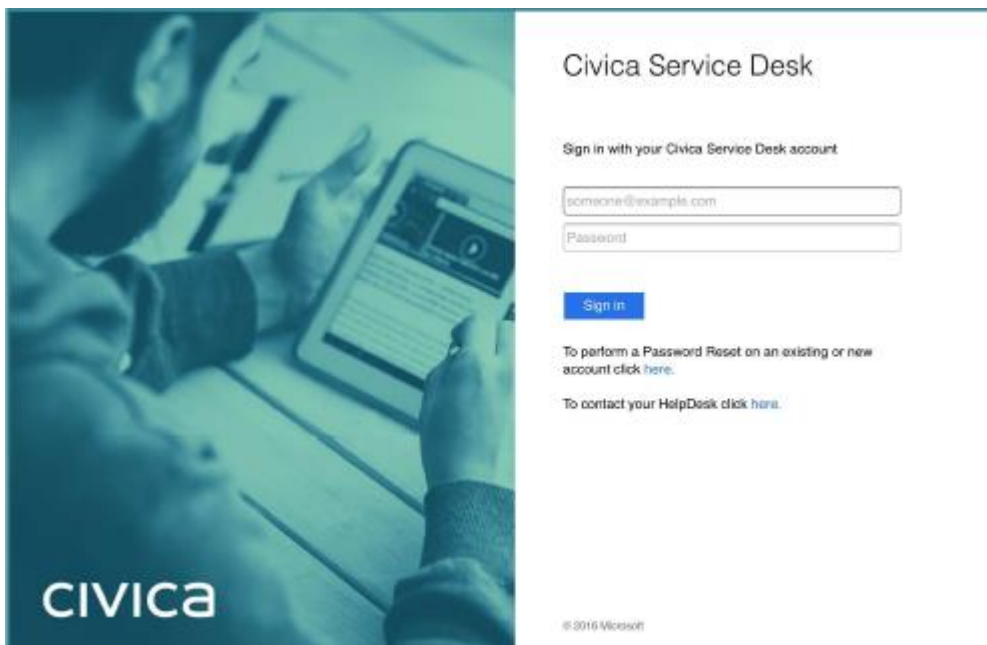
- IE version 11 is the recommended browser. IE versions 8-10 may function but only in a Windows 7 environment, older operating systems will no longer be compatible.
- Chrome version 38 or higher should function normally but there may be slightly different experience to IE.
- Firefox is not supported.
- While other browsers such as Edge or Safari may appear to work, there may be some different or reduced functionality

2 Logging into the Civica Self-Service Support Portal

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

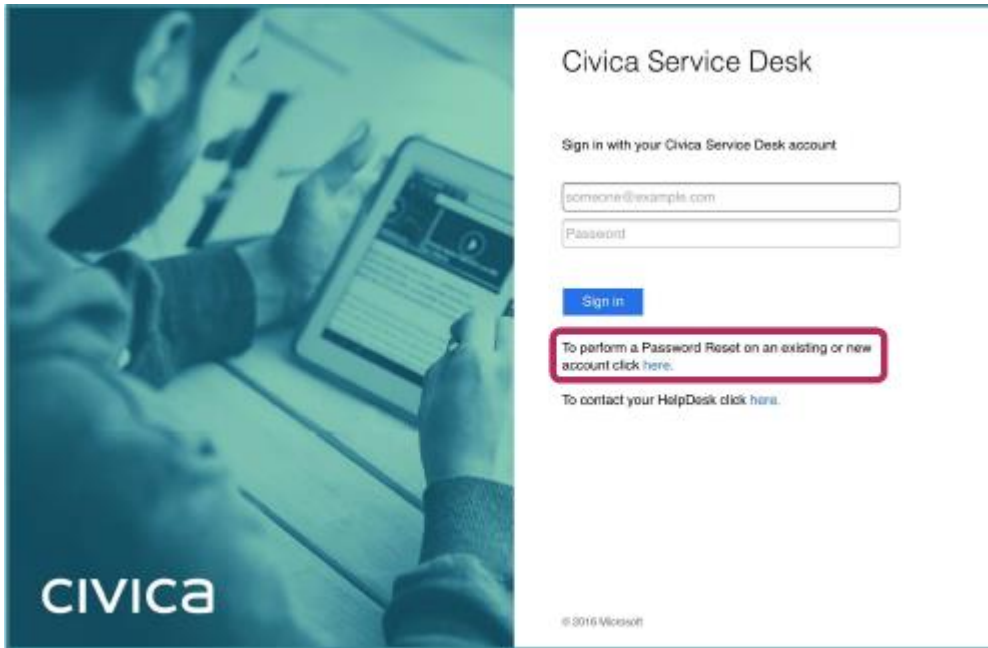
<https://servicedesk.civica.co.uk/SelfService/ss/>

The login page displays similar to the example below. Insert your user name (full email address in lower case) and password and select **Sign in**.

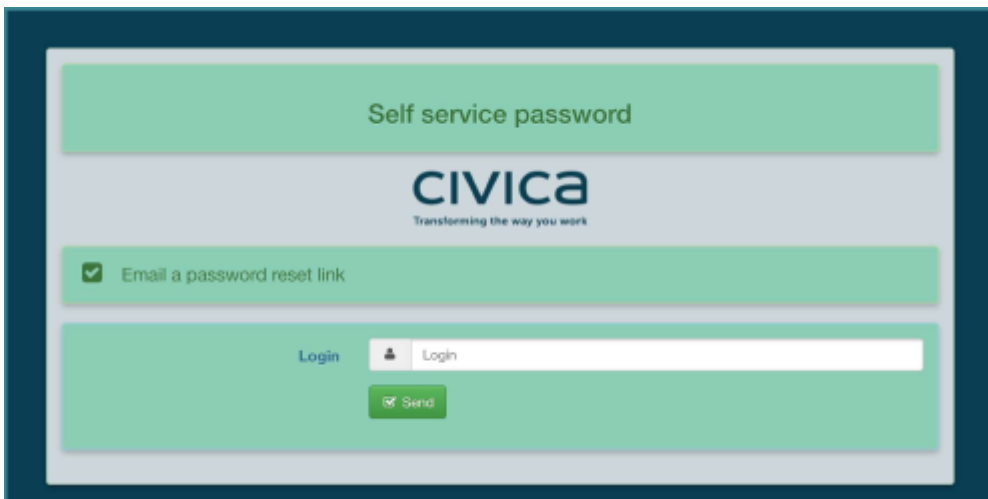


3 Resetting your password

If you have forgotten or lost your password, you can reset it from the login page. Navigate to <http://servicedesk.civica.co.uk/selfservice/ss> and select the Password Reset Link as shown below:



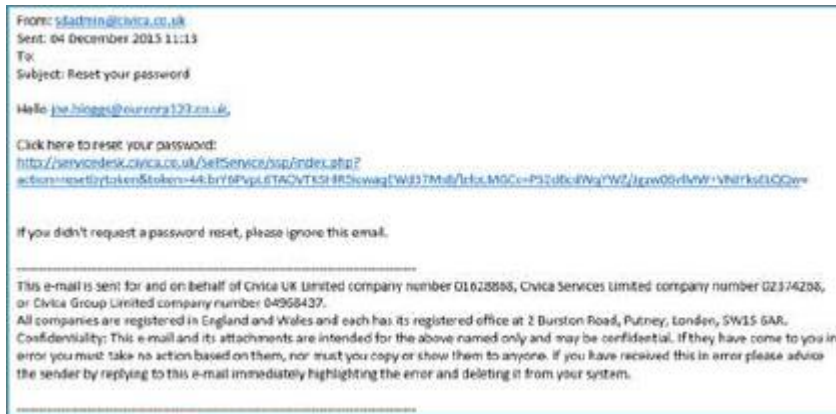
This will take you to the Password Reset Function, your Login will be your full email address, for example: joe.bloggs@ourcorp123.com.au and then click the **Send** button.



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 Civica Self Service Support Portal again.

4 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. Some of these windows are described in the following sections.

5 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.

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

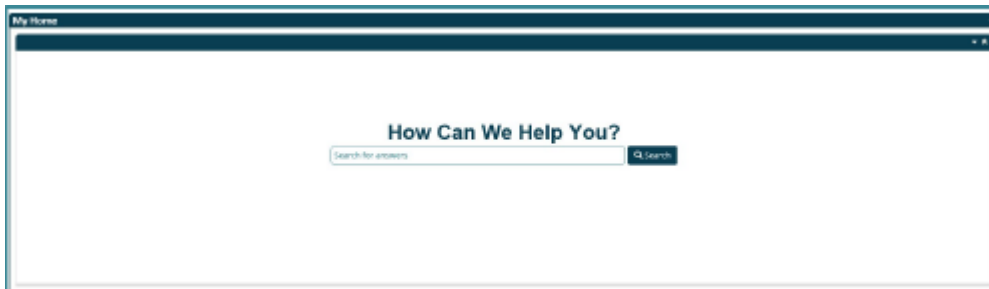
6 Logging and Updating a Ticket

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

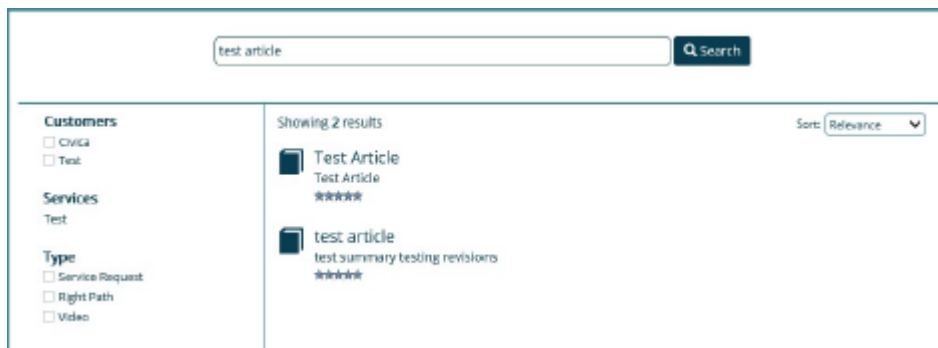
- **Log a new fault** – record a new fault (Incident) on the system for Civica to attend to
- **Raise a Request** – The service catalogue will allow you to request a range of items

This will enable you to Self-Serve more effectively, or have the exact details at 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.

1. Type in your Issue in the Search Bar, and click **Search**



2. 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



3. 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
4. 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

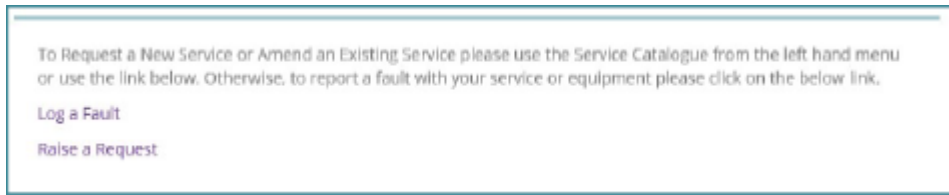
- Clicking the green **'Yes'** button lets us know that the article helped and you were able to resolve your issue. You'll then be returned to the home page to begin a new search or close the portal



- 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

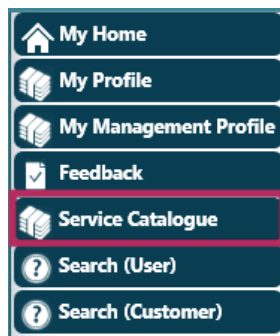


5. In the event that we don't have a knowledge article on your specific issue, then you'll see information on what to do next to get your issue resolved



6. 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



6.1 Log a Fault – Field Entry

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 use various Civica products

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, Authority, 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 the proceeding sections**

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.

6.2 Raise a Request – Field Entry

New Request

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;

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 the proceeding sections**

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

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

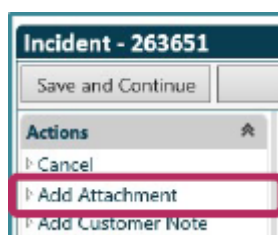
Once completed successfully your request details will be assigned to the Civica Service Desk to review, respond and begin work.

6.3 Adding an Attachment

Supporting documentation can be attached once the Incident or Request has been issued a reference number by the system.

Note: there is a file limit of 5MB per document/file.

Choose **Add Attachment** in the Actions sections.



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.

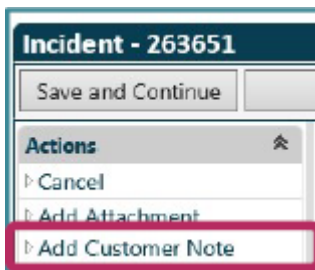
You may wish to add a note with the attachment, select the box for **Do you want to add a Note with this attachment?**, enter the information into the **Note Details** box. The note will also be added as an entry to the **Customer Notes** tab.



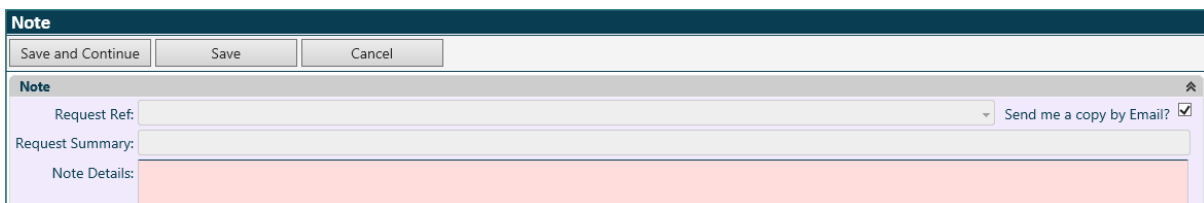
6.4 Add a Customer Note

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

Click on **Add Customer Note** in the Actions section.

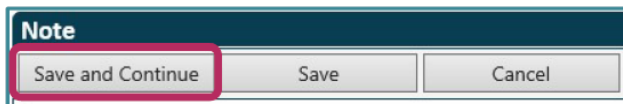


The Note screen will display similar to the example below. In the **Details** field type the contents of your note. If you are replying to a request for information you should give as much detail as possible.



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 main ticket 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 if possible to help CI...

7 My Active Tickets Windows

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

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

My Active Tickets					
Incident (1)					
	Ref#:499169	Created: 25/2/2020 00:59:34	Updated: 25/2/2020 00:59:34	Summary: Brief outline of the ticket	
Request (1)					

Each row in the **My Active Tickets** section displays an icon on the left depicting if the issue is being treated as an Incident or a Request.



Is an Incident







Is a Request

8 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, a menu will display showing the actions that you can take with that ticket as shown below.

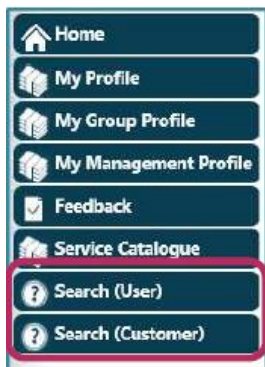
My Active Tickets					
Incident (3)					
	Ref#:263616	Created: 3/8/2018 10:53:18	Updated: 10/8/2018 10:46:13	Summary: test incident	
	Ref#:263613	Created: 3/8/2018 10:28:42		Summary: test incident summary	

9 Searching for Faults (Incidents) / Requests

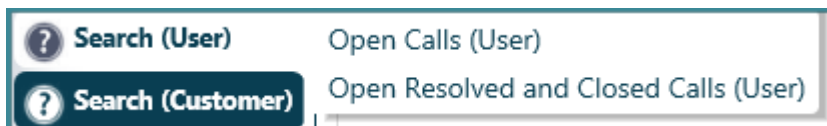
There are different search buttons depending on your role and permissions

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 in the same organisation.



Hovering your mouse over one of the options will display a menu, click one of these options. **Open Calls** will only search Incidents or Request that are open/active. **Open Resolved and Closed Calls** will search all Incidents and Requests regardless of their status.



Key Search Criteria fields are described below. Not all fields require you to input information to conduct a search, if you know the **Reference Number**, this can be entered into the relevant field. The Enter key must be pressed for the search to commence.

- **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

10 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. 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.










11 Explanation of Icons

11.1 Incident Icons and Stages

Icon	Status Name & Description
	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 Customer – We are waiting for a response from you, the customer, to provide us with more information about the issue.
	With Customer to Confirm Resolutions – We are waiting for a response from you, the customer, to give permission to resolve a call.
	With 3rd Party – Your issue has required the help from a 3rd Party organisation (for instance a Telecommunications provider).
	Resolved – The Incident ticket has been resolved and is closed from the customer’s perspective.

	<p>Closed – The Incident ticket has been closed from the Analyst’s perspective</p>
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11.2 Request Icons and Stages

Icon	Status Name & Description
	<p>Pending Triage – The Request has been recorded on the system and is waiting for a Civica Analyst to review it. This status may appear for certain Service Catalogue items.</p>
	<p>Provisioning – The Request has been recorded on the system and is now being managed. This status is applied to Service Catalogue items other than Requests logged using Ask a Question</p>
	<p>In Progress – The Request has been recorded on the system and is now being managed. Similar to Provisioning status. This status will appear if Ask a Question was used to log a Request</p>
	<p>With 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.</p>
	<p>User Sign Off – We believe the Request has been fulfilled, but have asked you to confirm the Request is fulfilled.</p>
	<p>With 3rd Party – Your issue has required the help from a 3rd Party organisation (for instance a Telecommunications provider).</p>
	<p>Rejected – Your Request has been rejected.</p>
	<p>Cancelled – Your Request has been cancelled.</p>
	<p>Closed – Your Request has been completed successfully.</p>

12 Service Desk Contact Details and Further Information

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

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: 1300 303 032 Spydus Online Help: https://yourlibraryurl.spydus.com/#WelcomeToCivicaHelp.html
Local Government	Telephone: 1800 643 436 Email: support@authority.civica.com.au
All Customers Self-Service Portal	https://servicedesk.civica.co.uk/SelfService/ss/

