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# Document Management History

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Introduction

The Division of Information Technology is committed to continual improvement of our services to all of our clients. In November 2017 an updated Online Self Service facility was released to provide a help desk portal to all CSU staff, both on and off campus, 24 hours a day 7 days a week.

The updated CSU Service Portal, powered by the Cherwell Platform, is delivering a new incident management tool for CSU as a replacement for the ageing LANDesk System. This system aims to improve on the services we provide, saving you time, streamlining parts of the incident process and giving you more control over jobs you log.

The updated Service Portal provides more options for DIT to communicate better with you, and keep you informed of the progress of your incidents and requests.

With the updated Self Service Portal you will be able to:

- View all of your open and resolved incidents and requests
- Log a new incident or request using an updated service catalogue with an enhanced workflow.
- Add attachments if required
- Add notes anytime, even after you have saved your job and DIT has begun processing it
- View notes that DIT has added to your job for information on progress
- Resolve/Withdraw your own job if you no longer require assistance
- Use the Knowledgebase to search to find an answer to your question or a solution to your issue. These KBs will continue to be built, so keep checking for new ones.

Getting Started - Log in to Online Self Service


Enter your CSU username and current password.

Browsers

The Self Service portal can be accessed with any of these browsers - Chrome, Internet Explorer, Edge and Firefox.

If the page does not display your security settings may be preventing pop ups. Go to your browser options menu and Allow pop-ups for csu.cherwellondemand.com

Currently the portal cannot be accessed via Safari or IOS devices (iPads, iPhones). We recommend using another browser such as Chrome or Firefox. We hope this will be resolved in future releases.
Using Self Service Portal - The Home page

An overview of the home page or Welcome screen, at any time you can click **Home** to return to this screen. This document provides more information on each of the sections.

Customer Information – your details
Log an Incident or Request

- Click on **Log an Incident or Request** to be presented with our top level services and descriptions.

- Click on the relevant grey box to select the service you need.

- Each top level service will show the 2nd level category and incidents and requests that relate to it.

- If you are unsure what category to choose, select the most relevant and submit. The Service Desk will review and update it as needed, to ensure you receive assistance as soon as possible.
When logging an Incident the screen will look slightly different. You will be asked 2 questions to help us understand the impact and urgency of the issue.

A pop up will confirm your job has been logged and provide you with an Incident or Request ID number.

Relevant KBs will be displayed. Take a look as it may contain the answer you need, or info that we need to resolve your request quickly.

Help us understand the impact and urgency of this issue so that we can prioritise incidents for ALL staff and resolve issues quickly. In this example it looks like a wider network issue needs attention fast.

Enter a description and click Save.

Use quick search to look for other knowledge topics.

Note – Incidents/Requests you have logged that contain your search word will also appear in a list with knowledge articles (separated in a clear list).
- The My Items page will be displayed with your latest incident or request listed at the top.

- The progress of your open Incident or Request will be highlighted. Possible statuses are - New, Assigned, In Progress, Resolved and Closed (note closed jobs cannot be re-opened).

- You can add a comment which will be saved in the notes and comments sections. You can also view notes from DIT in this area.

An estimated response and completion date will be shown determined by the SLA for the category selected as well as the impact and urgency. This also shows the analyst and or team that is working on your Incident or Request.
• You can withdraw your Incident or cancel your Request if it is no longer needed. You will be prompted to tell us why you would like to withdraw your Incident or cancel your Request.

• This won’t close the job but it will let us know of your intention to cancel and we will process it.

My Open Incidents and Requests
You can view all of your open and closed incidents and requests via the link at the bottom of the home screen as explained, or you can see the same screen via the My Items menu on the top of the Welcome screen.

A summary list is shown for each open incident or request.
• The Service category and Incident ID is displayed in bold. Click on this link to see more information.
• The date and time it was logged
• Status – E.G New, Pending
• Owned by team – this shows which team it is assigned to
• Your description
Adding additional information to Open Incidents and Requests

Locate the job from the summary list described above.
If your job has been assigned to an analyst, an automatic email will be sent to them to advise you have added a note.

- When your Incident or Request is set to pending status we are waiting on something to complete your job. This could be:
  - equipment, information or work from a supplier or third party;
  - the request is for a future date/time such as conference support;
  - the request cannot be completed until a request for change (RFC) has been approved and actioned; or
  - we are waiting on information or action from you. (If this status has been selected you will have received an email to advise what is required from you)

Adding an Attachment

After selecting an open Incident or Request from the summary list in My Items, click on Edit to be able to add an attachment. Click on the **paperclip** to add an attachment.

- Type a meaningful name and description for your attachment
• Click on the green plus symbol to navigate to the file you want to attach and click **Save**

![Import File](image)

• Click **Save** in your open Incident or Request (You will be prompted to **Save** if you click on anything else)

• Your attachment is now listed and can be viewed by you or any analyst.

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**Resolving an open Incident**

If you no longer require assistance from DIT you can close any open Incident or Request.

• Locate the job from the summary list in **My Items** and click on the bold **category title/Incident number** to open the job

• Below the description box, click on **Withdraw Incident** or **Cancel Request**.

• If your job has been assigned to an analyst, an automatic email will be sent to the assigned analyst working to resolve your incident/request, to notify them that you have requested to close this job. Your request is also recorded in the notes section for teams to action as required.
View Closed and Resolved Incidents and Requests

- Click on My Items or View my Incidents and requests from the Welcome screen
- When your Incident or Request is resolved it will no longer be in your Open Incidents and Requests summary list. Click on the graph in All Closed incidents and Requests

A summary list is shown for each closed Incident and Request.
- The Service category and incident ID is displayed in bold. Click on this link to see more information.
- The date and time it was logged
- Status – E.G Resolved or Closed
- Owned by team – this shows which team resolved your job

- Possible status are - New, Assigned, In progress, Resolved and Closed (note closed jobs cannot be re-opened)

- Status explained
  - Resolved – Your Incident or Request has been resolved. You will receive an email notifying you of the resolution. If you don’t agree, you can contact the analyst who resolved it or the Service Desk within 3 business days to discuss and request it be re-opened
- **Closed** – Your Incident or Request was resolved. You received an email notifying you of the resolution. After 3 business days your Incident or Request automatically moved to closed status.
  
  Note; A closed Incident or Request cannot be re-opened, if required a new job will need to be created.

**Using the Knowledgebase**

The Knowledgebase is a database of articles created from common issues or questions asked by staff. We are continually creating Knowledgebase articles to provide you with information and faster solutions.

We encourage you to view the Self-help and search our Knowledgebase each time you log a new job. You may find information we will need to process your request quickly, or information to solve the issue you are having, in which case you either won’t need to log a job or you will be able to resolve your job.

At any time you can access the Knowledgebase to search for known solutions a number of ways:

- Enter a keyword to search all knowledge articles from the Welcome screen
- Within an open Incident or Request (Use quick search to look for other knowledge topics. Note – Incidents/Requests you have logged that contain the search word will also appear with knowledge articles (separated in a clear list)
- Click **View All Knowledge Articles** link on the Welcome screen and see a complete list of all articles and most popular articles. You can search using a keyword on this page as well.

![Knowledgebase interface](image)
Self help
Click on **View Other Self Help and FAQs** on the Welcome screen to look for relevant knowledge about our services. We will be reviewing, updating and improving this information over time. Both the Self Help page and the Knowledge base Articles are being reviewed to ensure we are presenting the correct information to you in the easiest format.

Feedback
Your feedback is very important to us and we encourage you to let us know what you think of this new service.

Further Assistance
If you require further assistance please contact the DIT Service Desk.