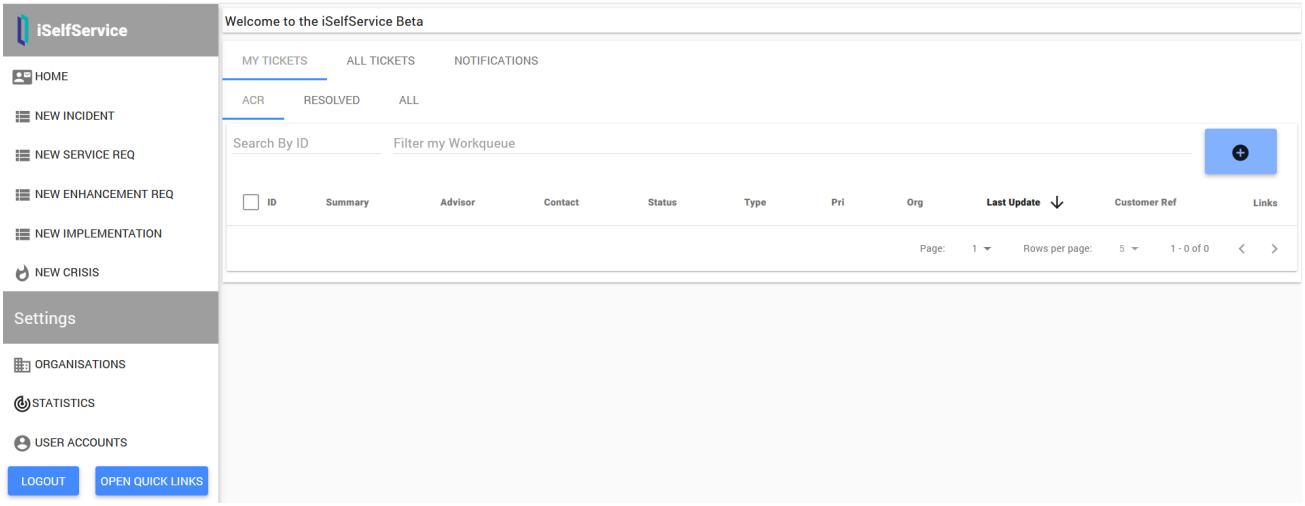
iSelfService - Customer User Guide

iSelfService is a workflow driven service desk system that replaces TRC. This retains all the existing functionality of TRC, but loads the data you need dynamically and uses workflows to simplify functionality.

- Homepage
- Issue View
- New Incident
- New Crisis
- Search
- User Accounts

Homepage



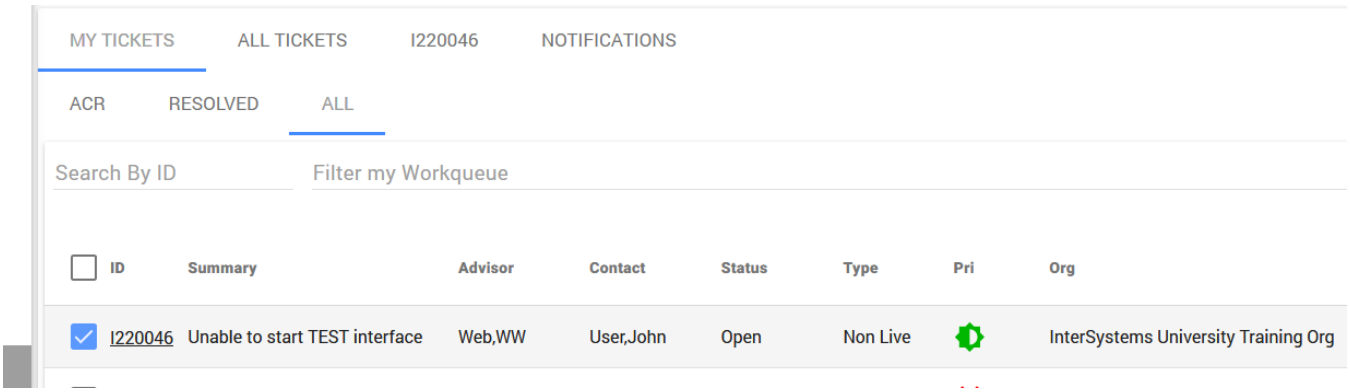
When first loading iSelfService you will see the above page.

The default view is to show ‘My Tickets’ and ‘ACR’ (issues awaiting your attention)

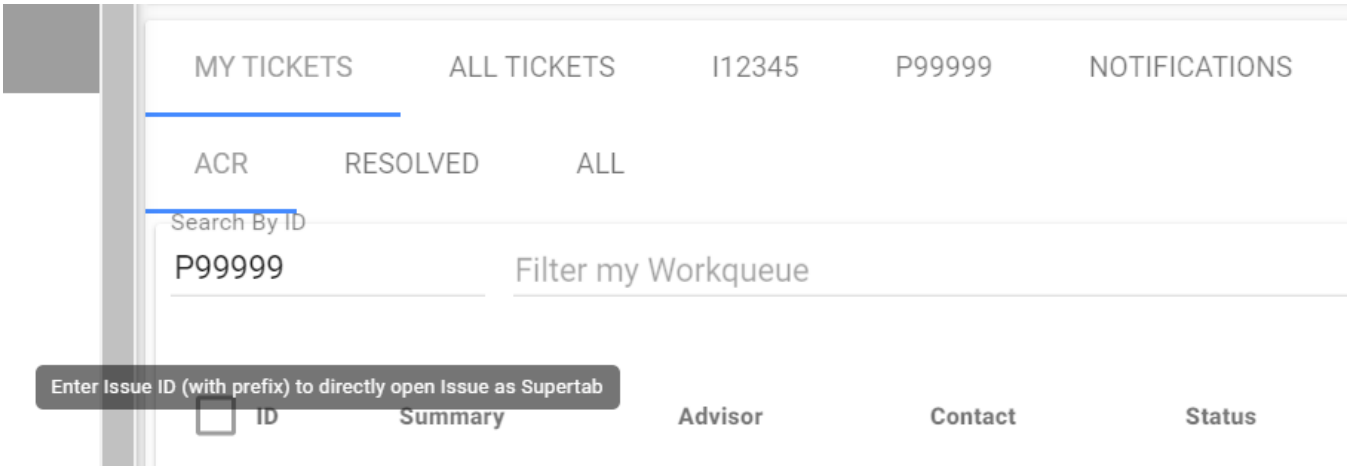
- Clicking the ‘Resolved’ tab will show all Pending issues(pending closure confirmation)
- Clicking the ‘All’ tab will show all non-closed issues you have opened.
- Clicking the ‘All tickets’ tab will give the same 3 options for your organisation as a whole (i.e. issues opened by all contacts at your organisation)

On the side menu, clicking 'iSelfService' will always return you to a reset homepage.

Selecting a ticket by the select box in the list will open that ticket in a new tab – this tab will remain until you either log out, or refresh your browser. You can switch between these issues without reloading the website.



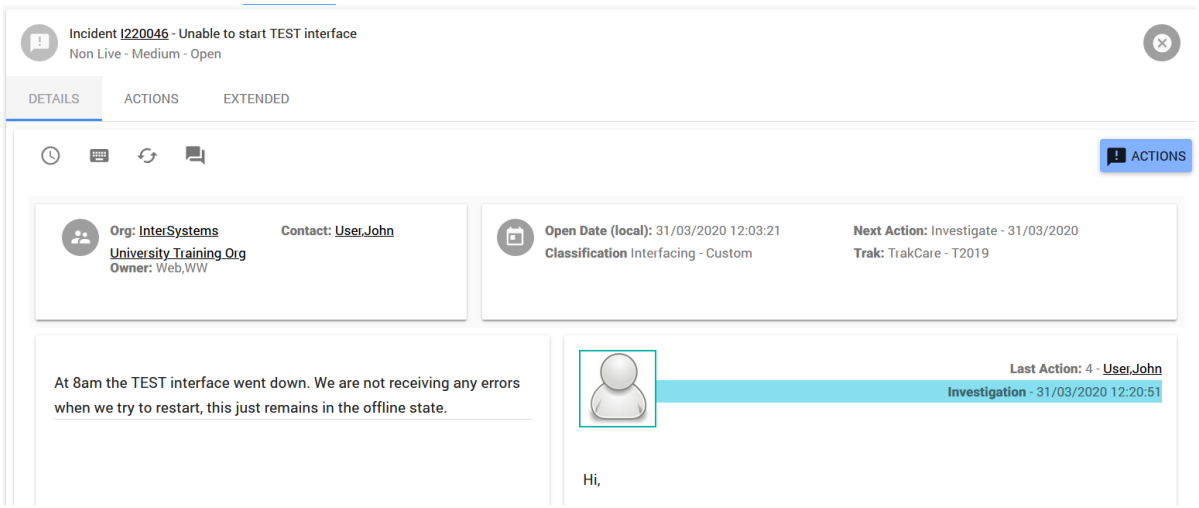
The other option to load a known incident is to enter an issue number in the "Search By ID" field. Tabbing out of this field will open the issue in a new tab. Issue numbers used here should contain their prefix (e.g I12345 or P99999)



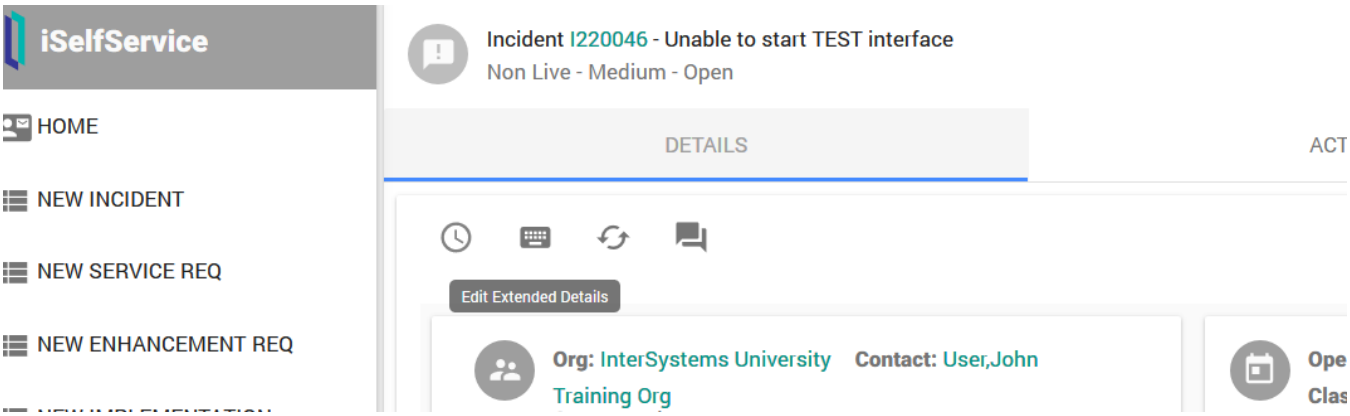
Issue View

When loading an issue the Details tab is the default information shown.

- The ‘Details’ tab shows high level details
- The ‘Actions’ tab shows all historical actions

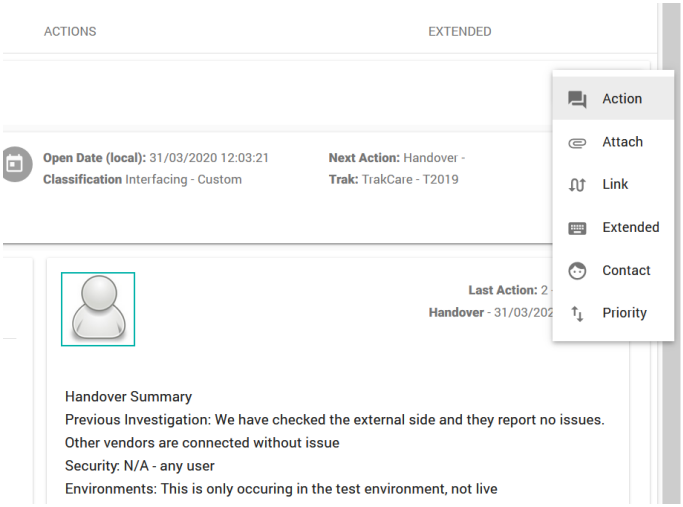


On the Details tab the panels at the top of the screen detail the metadata of the issue. Some of this will have been entered when the issue was created, to update these you can click on the Edit Extended Details icon shown below



These quick actions will appear on all tabs in the issue view.

The speech bubble icon will create a new action. Other actions can be performed using the Action menu button in the top right of the screen on all tabs.



There are several Action types here:

Action will add a new action

Attach will allow you to add another attachment

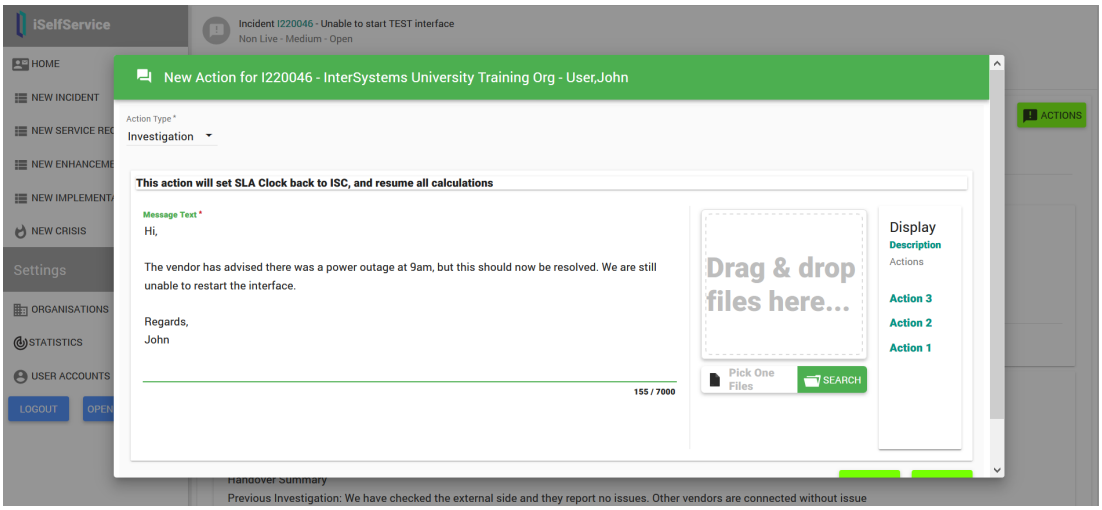
Link will allow you to link a CCR number if required

Extended will load the Edit Extended Details popup where you can add additional people to receive emails about this issue.

Contact allows you to transfer the issue to someone else in your organisation

Priority allows you to change the priority of the ticket. Escalation to a crisis will request additional information about the impact of the issue.

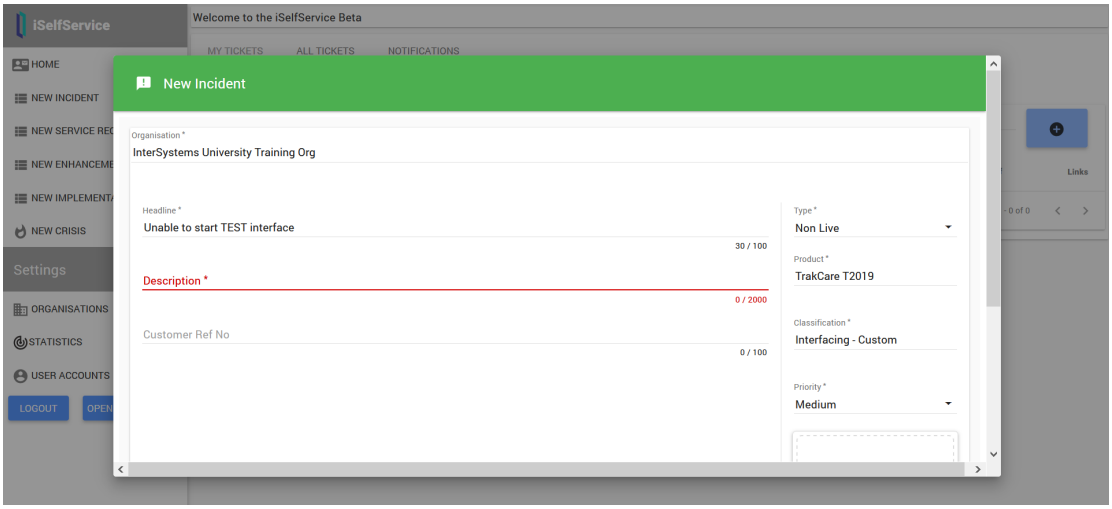
Clicking the Action button will show a popup as below:



The Action Type will default to Investigation. If an issue has been resolved, Closed can be selected here to close the issue.

New Incident

Opening issues in iSelfService is done via a workflow, unlike the static pages of TRC. To beging this workflow, click New Incident on the left side menu. This will open the following popup:



All fields with an asterisk are required fields.

Headline is a short summary of the issue that should easily allow it to be differentiated from other issues.

Description is a more detailed summary of the issue that should provide the information necessary to investigate the issue.

Customer Ref No should contain a reference number which you use within your organisation to track this issue, if appropriate.

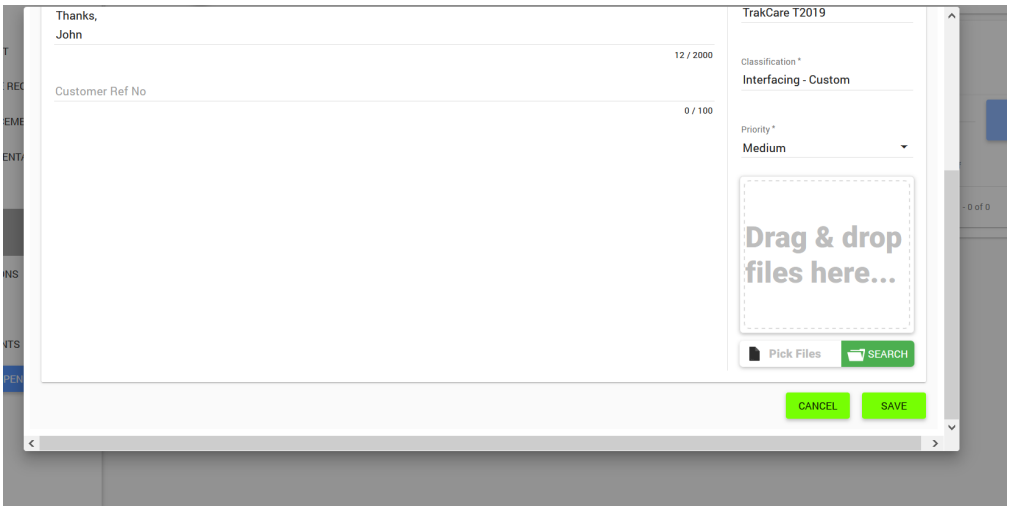
Type is the category of the issue. Most issues from your production system will be Live, but issues occurring in your test system would be Non-Live.

Product will provide a list of product configured for your organisation.

Classification is the system area affected. This will be specific to the product and can be left blank if not known.

Priority is the severity of the issue, in accordance with your Service Level Agreement.
Please note the priority of Crisis is no longer an option here as these issues have a dedicated workflow.

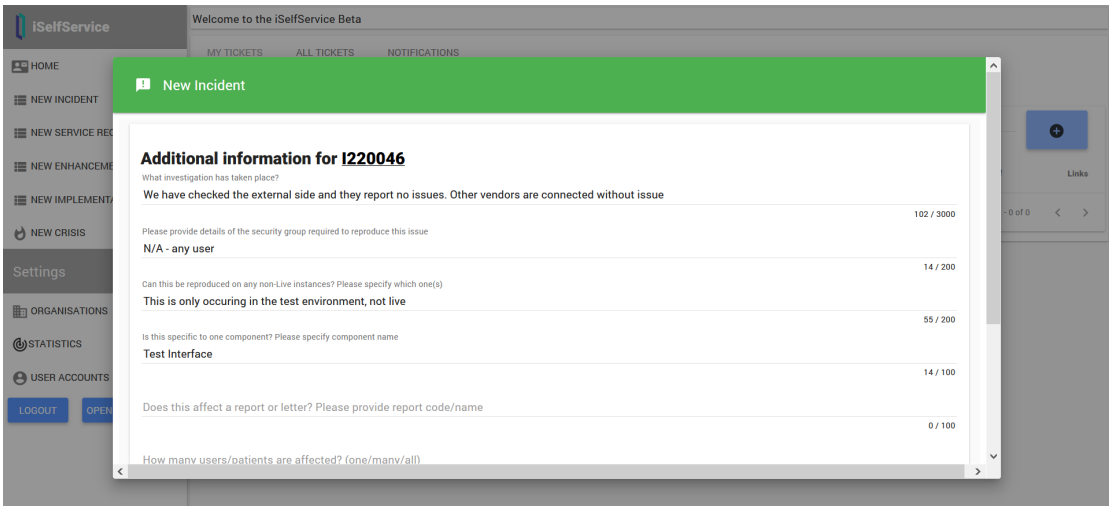
Scrolling down, there is the option to add a file to be attached to the issue as an action.



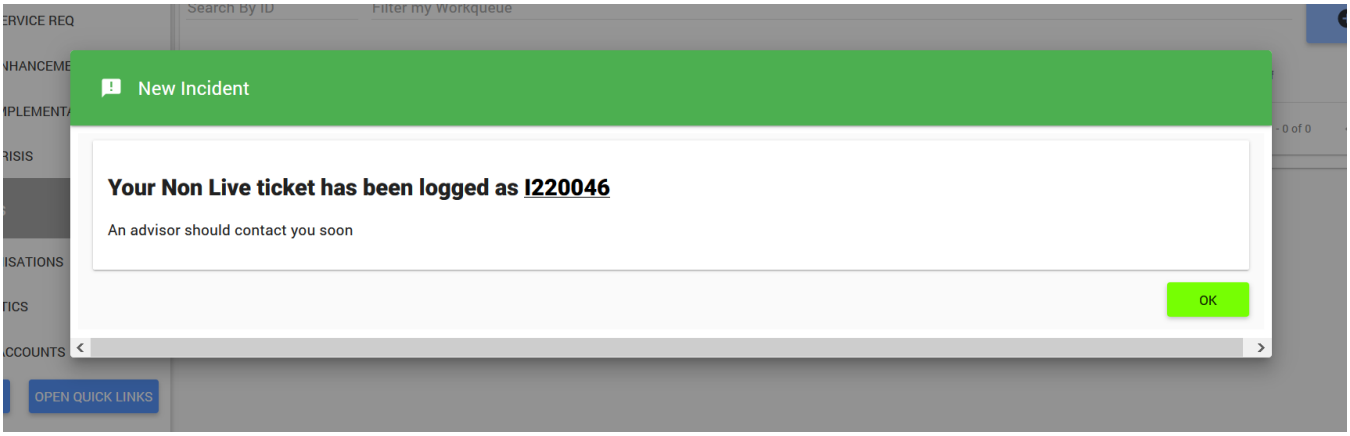
Clicking Save creates the Incident.

At this point a new screen will allow you to add additional information. In some regions, this is required as part of the Minimum Data Set, and will replace these forms. Accurate answers to these questions will help your support advisor to begin Investigation, and it is recommended to fill out as many questions as are applicable to your query.

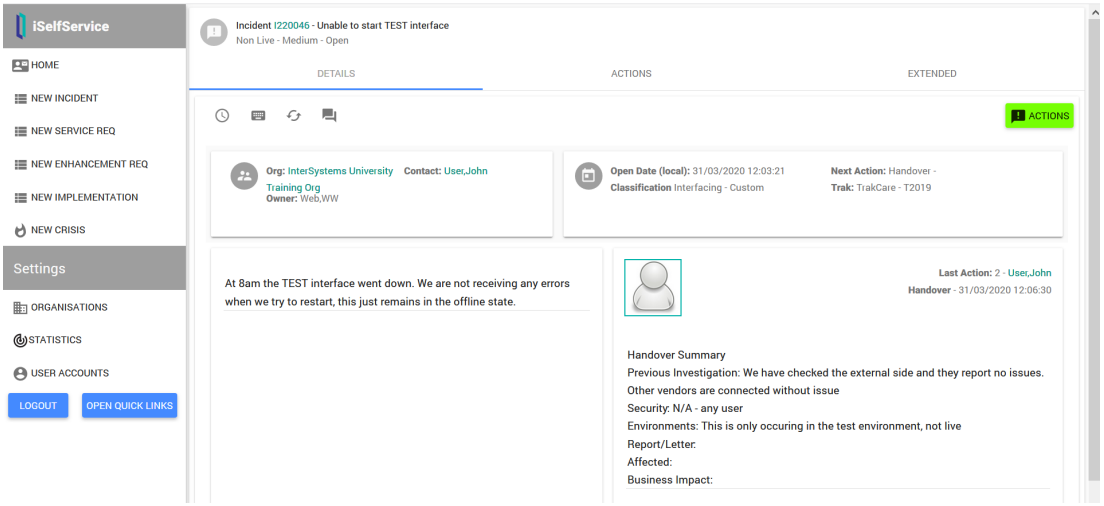
These will be recorded as a **Handover** action. If you do not complete this step, then you can access the workflow again from the *Handover* button on the Issue view. This button will only show if no Handover action was recorded for the ticket. If a ticket was previously opened in our TRC Customer application, it may display the Handover button, as this function is new to iSelfService. If your ticket is already in progress, then there is no need to complete a Handover action.



Clicking Save here confirms the incident number you have created.



Clicking OK will then load the Incident.

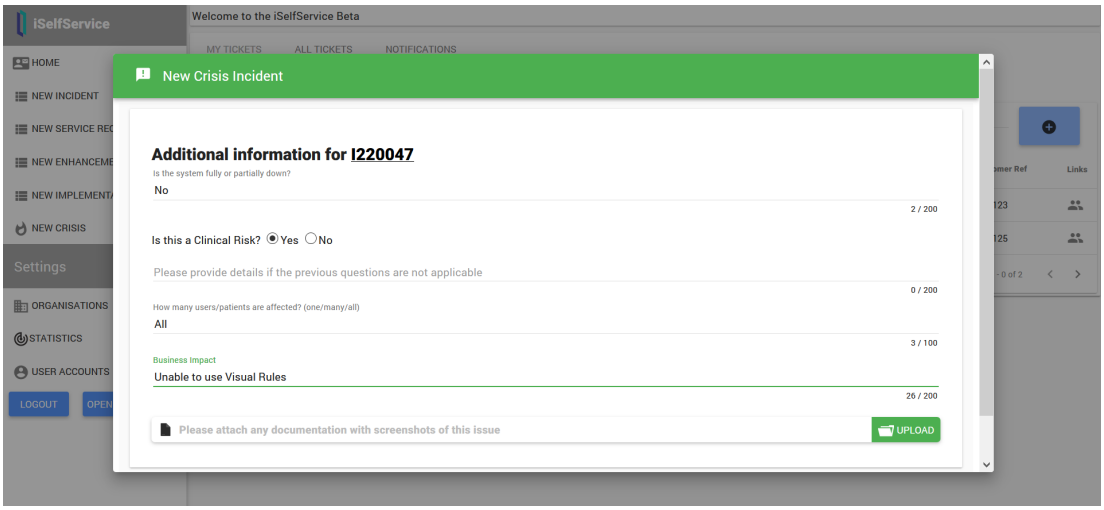


This is explained further in the section "Issue View"

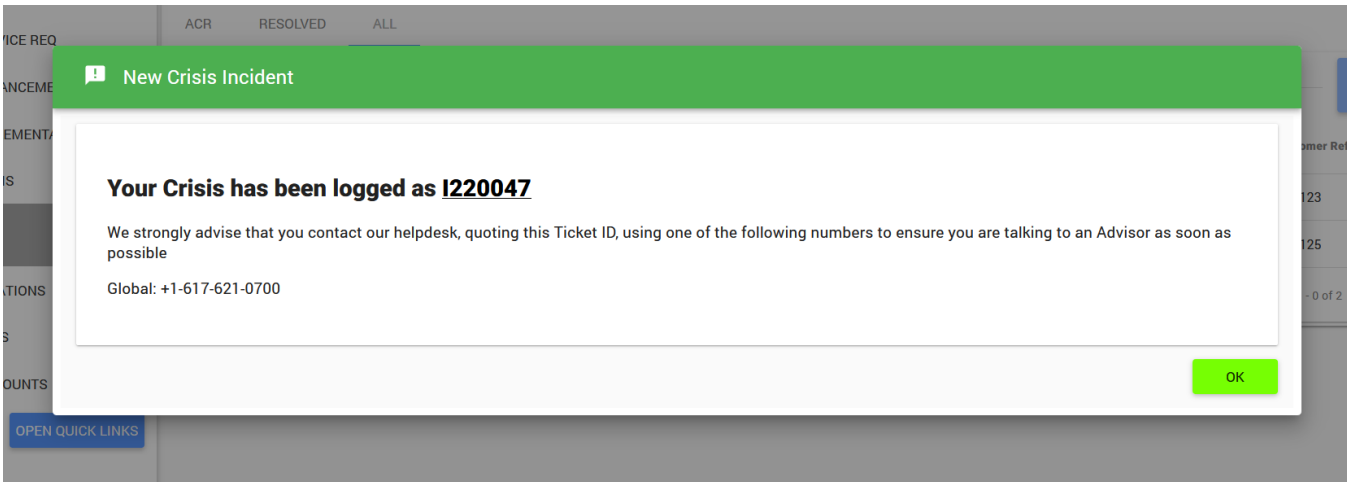
New Crisis

Ideally all crisis issues will be phoned through to ensure you receive an instant response.
Should you wish to open a crisis through iSelfService, we have provided a dedicated workflow.

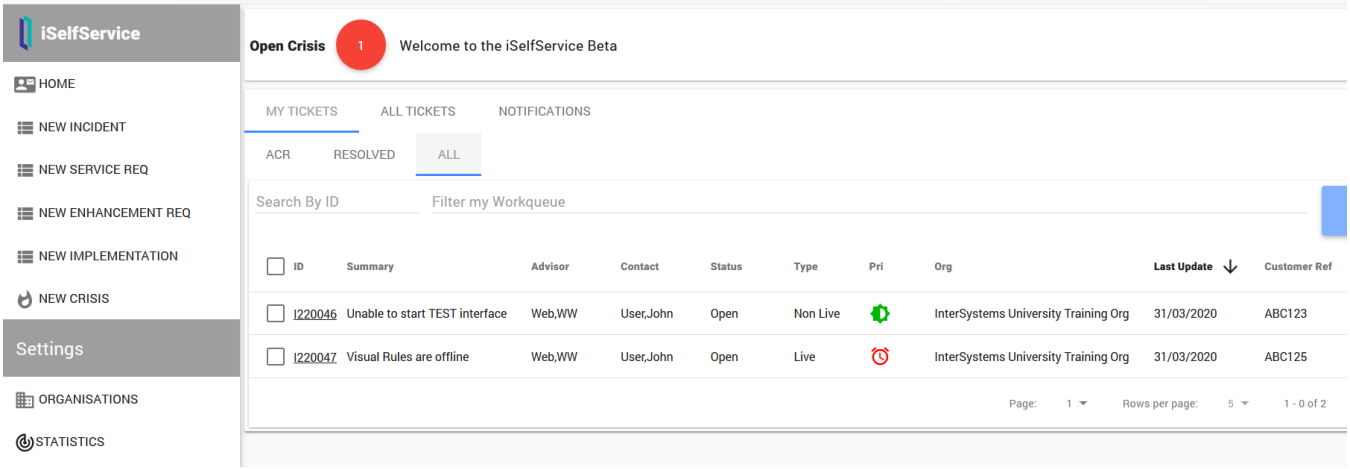
The first popup screen is similar to other issues, but the additional information requested on the second screen will requests information about the impact of the issue:



After saving the second screen, the relevant contact phone numbers to request immediate support are given:

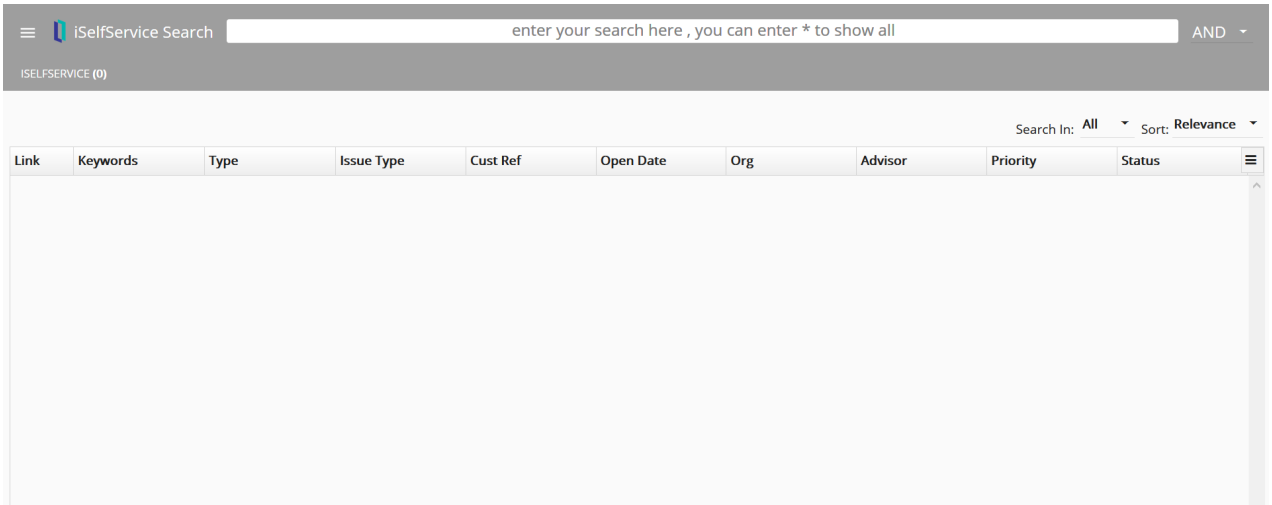


When a crisis exists for your organisation, a crisis icon will appear on you homepage. Clicking this will take you to the issue.



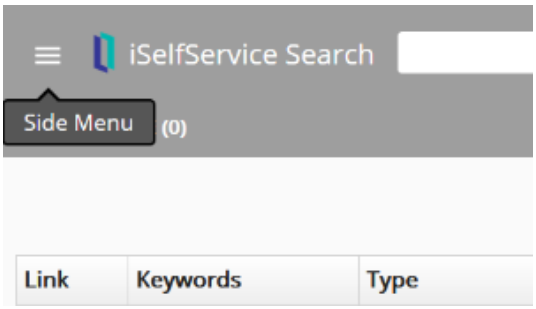
Search

Clicking Search on the side menu will take you to a new search screen for your organisation's issues

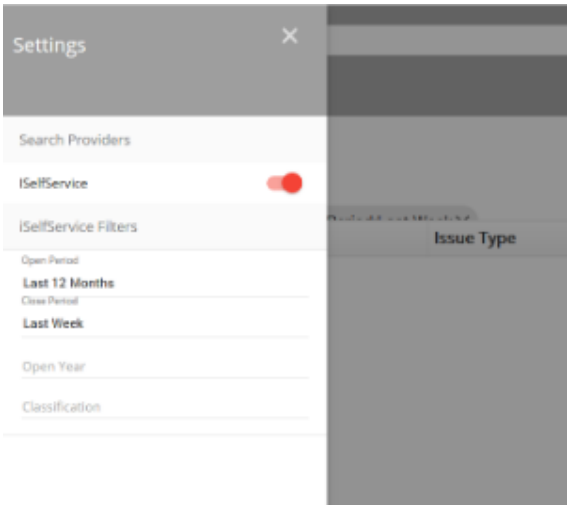


Search terms can be entered using grouping characters common to web searches (quotation marks, plus, minus). To the right of the search bar is the option to toggle the search type (And, Or, Phrase).

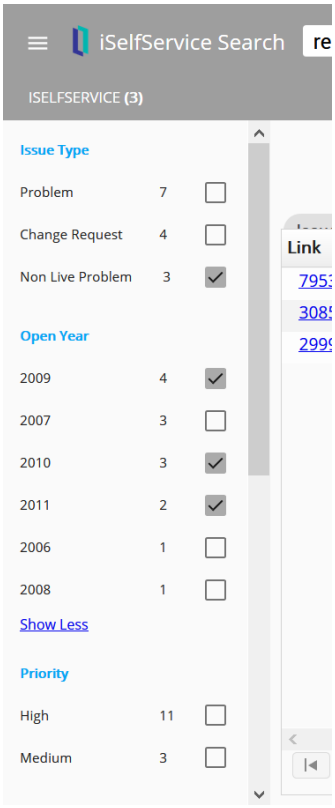
The hamburger icon on the left will open the side menu



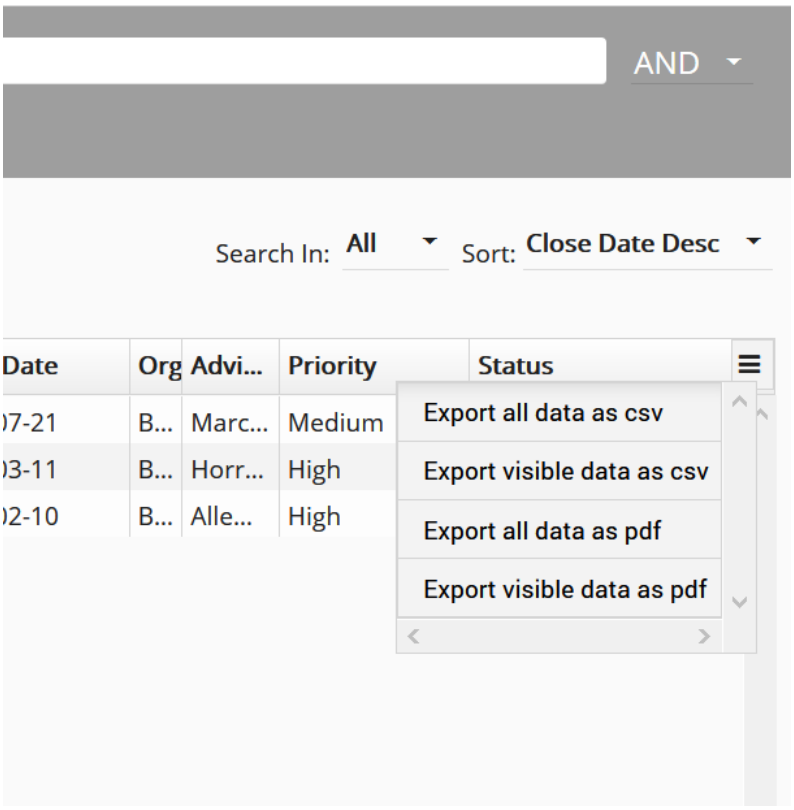
Here you can provide filter option that can be done before a search. Each additional search will retain these criteria. Changing these will redo the search.

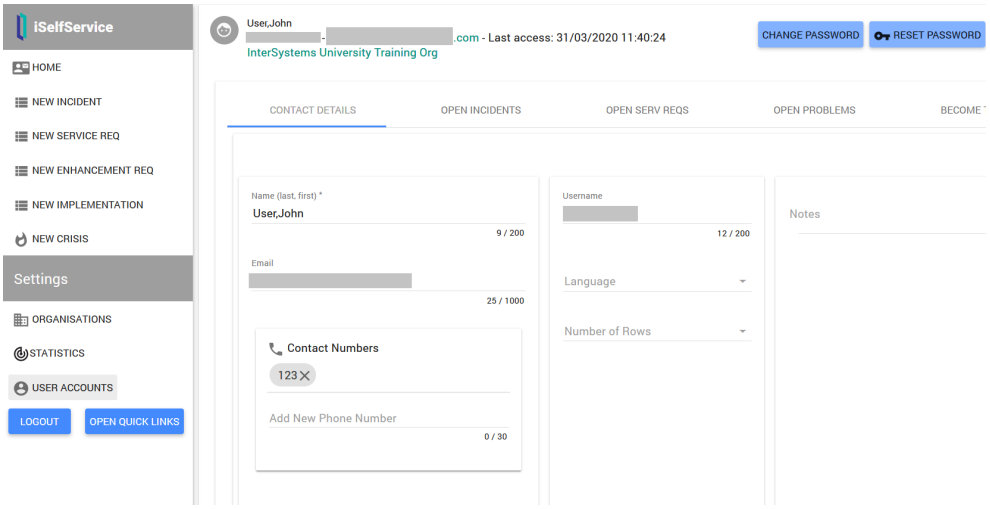


After entering search terms, additional post-search filters can be selected from a side panel. These can be toggled without redoing the search.



To export a search, click on the hamburger icon on the right side. This will provide several export options.



User Accounts

This menu provides a method to update your account details including adding or deleting phone numbers or changing your password.