



USU Self-service portal End User Guide

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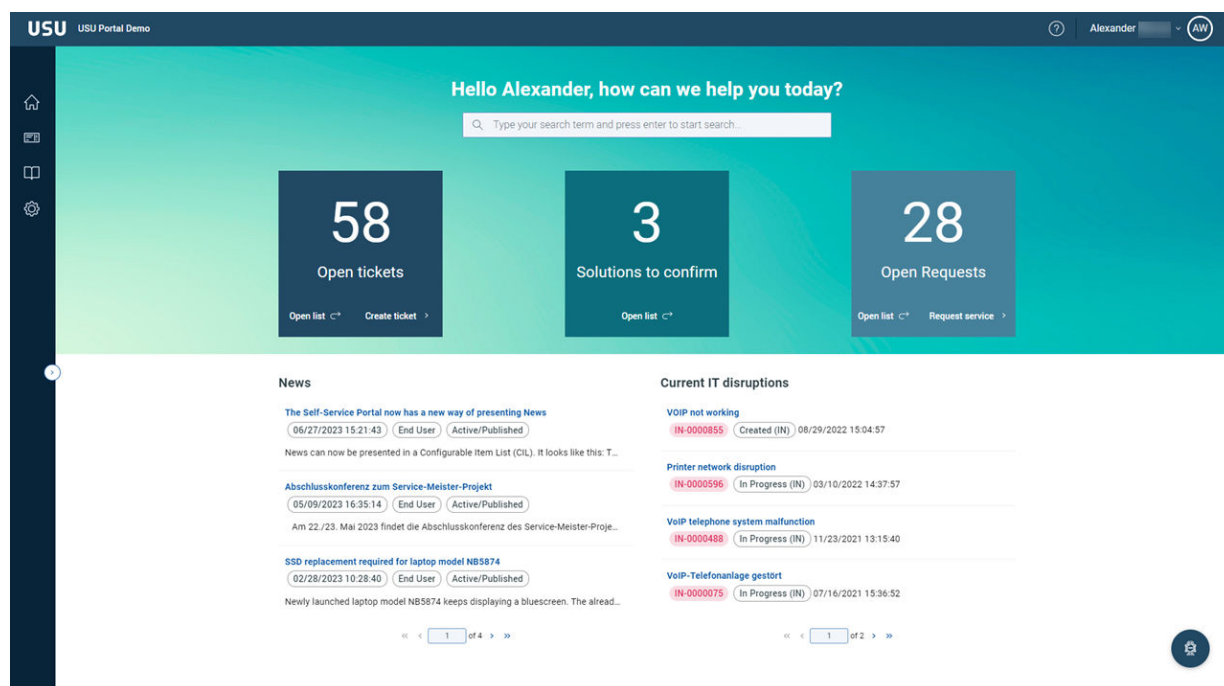
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1. Introduction

USU Self-Service Portal represents an easy access to all enterprise services for both **employees** and **managers**. It offers resources to help users resolve their issues and gives the managers a complete overview of various business data.



The **Self-Service Portal** can also be seen as an entry point into other products of the **USU** group. It acts as a common front end for an easy access to various source systems that can bundle information depending on different use cases.

1.1. About this guide

This manual consists of the following sections:

- **Introduction**

Learn about the [Self-Service Portal essentials \(page 8\)](#).

- **Terms**

A summary of the [basic terminology \(page 11\)](#) and an explanation of the [target groups \(page 12\)](#).

- **Main elements of the Welcome Page**

[GUI elements \(page 13\)](#) and the basic operations.

- **Working with the Self-Service Portal**

[Various tasks \(page 27\)](#) performed by the users and managers.



You can always return to the **Welcome Page** by clicking the **USU logo** in the toolbar.

1.2. Writing conventions

The following formatting conventions are used:

- Words in **bold** font
Names of actions, parameters and attributes; GUI buttons and keyboard keys.
Names of editors and catalogs; windows and dialog windows; window sections; menus, widgets.
Product and company names, important words which need to stand out.
- Words in *italic* font
Parameter values, attribute values, statuses
- Words in `code-like` format
Code examples

1.3. Content disclaimer

Please note that all examples and screenshots shown here are for **illustrative purposes** only.
The actual product may vary due to the individual product customization.





1.4. Version

Version info: Application v 3.1.0 / Help v2.11.0

1.5. About the Self-Service

IT Self-services generally provide customers with a simple and direct way of getting answers to a variety of questions and issues using a dedicated help desk website called a portal.

USU Self-Service brings efficiency to your help desk through the following methods:

	Avoiding tickets by providing knowledge	<ul style="list-style-type: none"> • Provide users with an easy access to the frequently used solution descriptions. • Let the chatbot guide your users to the solution in a dialog. • Send out notifications about known IT disruptions (Alerting).
	Automated remediation of disruptions	<ul style="list-style-type: none"> • Open the right place in Windows for problem solving by the user. • Execute services locally for automated problem analysis and elimination.
	Incident reporting by the user	<ul style="list-style-type: none"> • Users create tickets for themselves or for another person. • Enrich the ticket automatically with already given answers and performed actions. • Support the communication about the existing tickets.
	Service requests	<ul style="list-style-type: none"> • Access service offerings in the Service Shop. • Provide descriptions of ordering processes. • Automatically forward tasks to the right people.

Main objectives of the IT Self-Service are:

- Reachable also outside the service hours of the Help Desk
- All IT self-service concerns can be addressed at a central location
- Access via various end devices (PC, laptop, tablet, smartphone...)
- Intuitive usability
- Flexibility for different user types
 - Less IT-savvy users: Narrowing down the issue via dialog and being guided to the solution.
 - Power users: Directly access the possible solution or desired action.

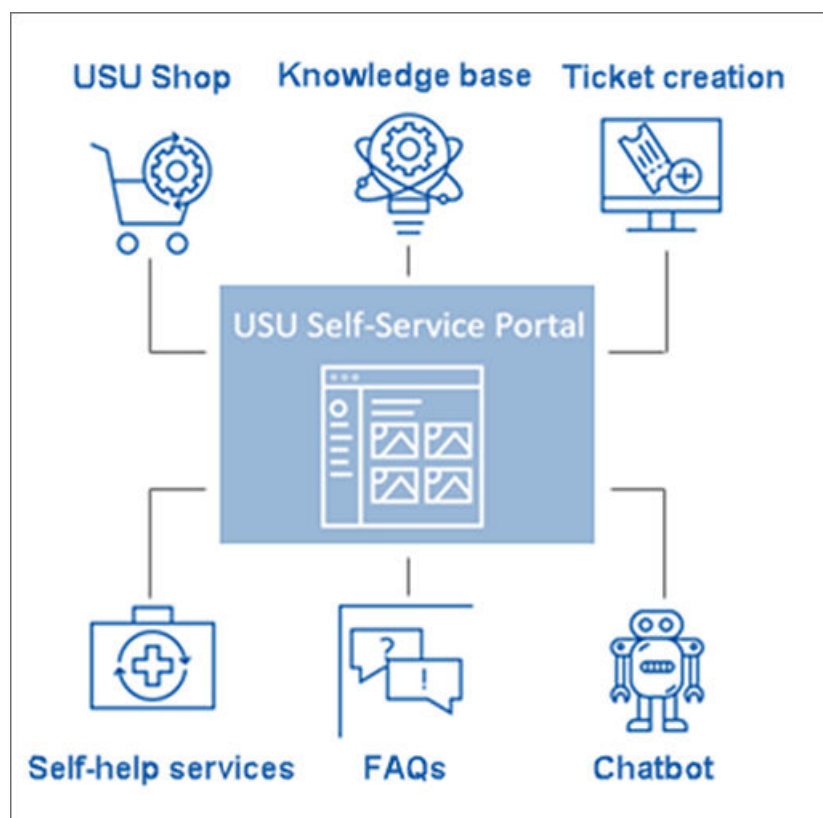
1.6. USU Self-Service Portal introduction

As an extension of , **USU Self-Service Portal** serves users who would prefer resolving issues on their own as well as users that simply want to contact the support team at once.

Following the [USU Self-Service key methods \(page 7\)](#), the USU Self-Service Portal has 4 main dimensions:

1. Avoiding tickets by providing knowledge
2. Incident reporting by the user
3. Automated remediation of disruptions (self-help actions)
4. Handling the service requests (USU Shop)

To cover these dimensions, Self-Service Portal comprises several different components:



See also [Terms \(page 11\)](#).

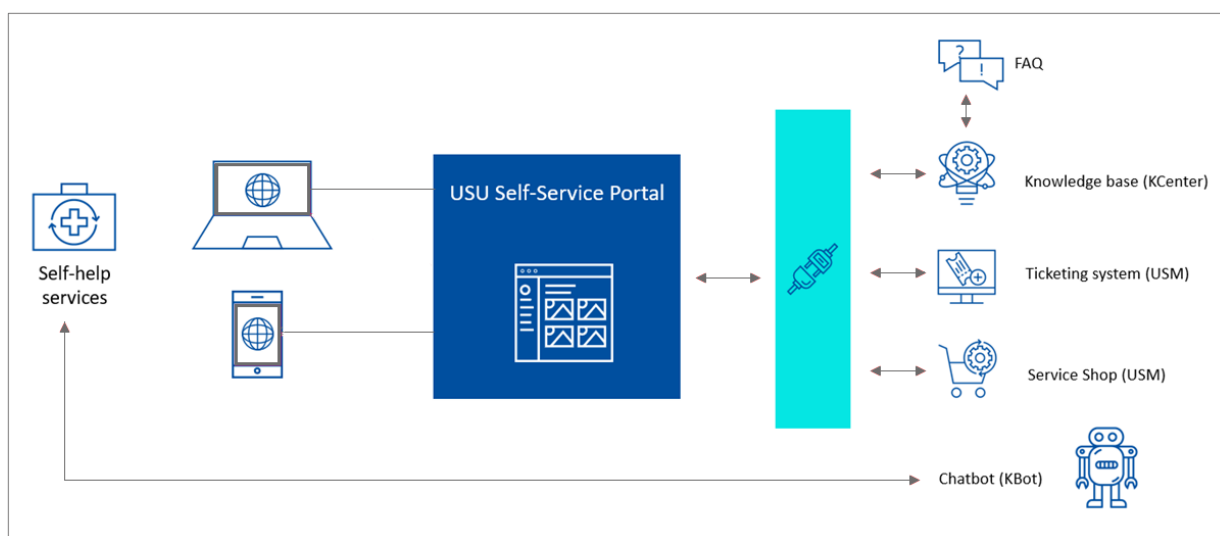
This **modular approach** to the customized self-service means that there are different components available and it is up to customers to decide which suits them the best. The customers can also combine the components in accordance with the requirements into the preferred self-service solution. For example, a customer may require a Portal configuration with the Ticket creation but without the Chatbot as well as any other combinations.



The selection of modules also depends on the objective, user groups and maturity level of the IT organization as well as on the existing tools.

1.6.1. Self-Service Portal architecture

Self-Service Portal works in conjunction with the other modules and offers a user the central access to the IT services on various end-devices. This modular approach is a key advantage of the USU Self-Service Portal solution.



- The end user has access via the **desktop app** or **mobile device** to the Self-Service Portal.
- The Portal in the back end is connected to the source systems with **specific adaptors**.
- Source systems are represented by **Knowledge Center (KC)** and **Chatbot** for the knowledge part and chat, **(USM)** as the ticketing system and **USU Shop**.
- Chatbot itself is connected to **self-healing services** on a local device.
- **Alerting** (not in the picture) is a kind of isolated component, it is not part of the Portal by default but rather another dimension of the active self-service. For example, to inform a user about the outage so that he will not create a ticket for it.

1.6.2. Self-Service Portal benefits

The quintessential benefit is as follows: Self-Service Portal provides an easy access to all **internal company services** for your employees and managers.

The other advantages are:

- Access to both IT services and non-IT services (HR, Facility, Accounting...).
- Displays information from various sources in aggregated and role specific views.
- Retrieve information about own services/assets and tasks in process.
- Retrieve information about services or assets assigned to my cost centers. It is intended for managers.
- Find and retrieve documents, FAQs and guided dialogs from the knowledge database.
- Report incidents and get them resolved.
- Request new services.
- Approve requests. It is intended for managers.
- Reduces workload of the IT and other service departments.
- Generally increases satisfaction of the end-users.

2. Terms and definitions

Use this section to find the USU Self-Service Portal **terms**, definitions and context for the search-related terms. In addition, learn about the specific **target groups** associated with the Self-Service Portal.

2.1. Terms

Within the **USU Self-Service Portal**, the following terms are fundamental in understanding the function and processes:

Knowledge base	A centralized repository of information where you can find already existing answers to your issues.
FAQs	Frequently asked questions. Basically a list of questions and answers intended to help customers understand a particular area of interest.
Chatbot	A chatting component which simulates a conversation with end-users and navigates them to the required response, solution or document automatically.
Alerting	Alerts a user to a specific issue. Another dimension of the active self-service, not part of the Portal by default.
Self-help services	This component is able to launch specific self-help actions. For example, adjust a screen resolution, reconnect network drives, delete the browser cache or execute quick repair functions for MS Office applications.
Ticket creation, Ticketing	Ticket is the central item in - IPC Management. A Ticket is used to represent Incident / Problem / Change requests. In the Portal context, it is the ability to create either "full-form" ticket or a quick ticket.
USU Shop	USU Shop is a self-contained application combining online shopping user experience with the power and flexibility characteristic of the USU approach to business administration software. In the Portal context, USU Shop references mean creating or handling service requests.
Dashlet	An element for displaying information and providing actions within a Portal Page. See also Welcome page overview (page 13) .
Portal Page	Summary of multiple dashlets in one view. See also Welcome page overview (page 13) .
Drawer	A sliding panel hidden in the right part of the frame. There are two drawer types: Detail view drawer and Form drawer. See also Welcome page overview (page 13) .
Ticket	Ticket is the central item in USU Service Management and used to represent Incident / Problem / Change requests. In the Portal context, ticketing is the ability to create either a "full-form" ticket or a quick ticket.
Call	In the front end, a user creates a Call ticket type (not an Incident) when creating a new issue using Self-Service Portal. Only later Service Desk classifies the individual calls as Incidents and Service Requests.

Incident	<p>An unplanned interruption to a service or reduction in the quality of a service.</p> <p>A ticket subcategory, see Ticket and Call.</p>
Request	<p>Request or Service Request represents a requirement for delivery of a product or service. It is a central object of USU Shop.</p> <p>A ticket subcategory, see Ticket and Call.</p>

2.2. Target groups

USU Self-Service Portal distinguishes between two primary target groups:

- **End-users**

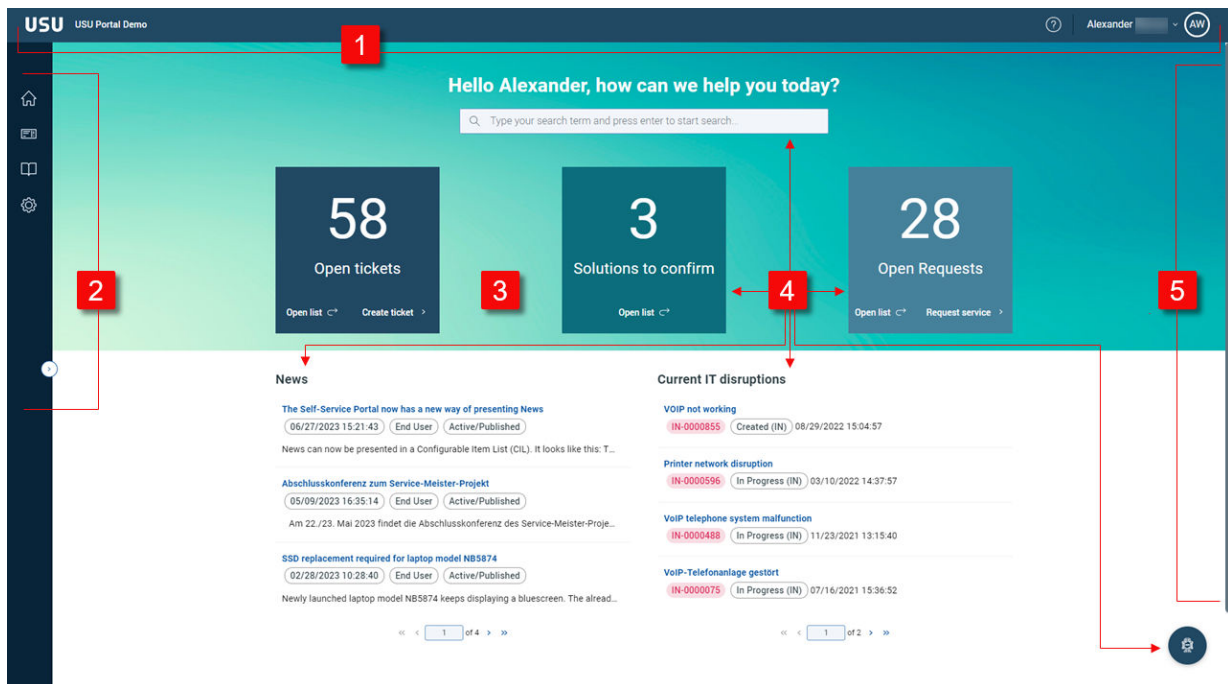
End users, also known as the regular employees, are the persons who actively use the Self-Service Portal. The end user typically searches for documents, uses the Chatbot, creates tickets or service requests and checks their lifecycle.

- **Managers**

Manager users use Self-Service Portal to retrieve information about their organization unit, for example systems and assets belonging to their organization unit or cost center. They may also have an insight into service requests placed by their employees and decide which requests are approved or rejected.

3. Welcome page overview

Welcome Page is an intro page of USU Self-Service Portal. It consists of several fixed and optional elements.



1	<u>Toolbar (page 18)</u>	<p>USU toolbar is always visible at the top of the Welcome Page. It contains two elements: USU logo and User profile.</p> <p>Note that the toolbar and the navigation menu don't specifically belong to the Welcome page. They are the basic Portal components and are always available.</p>
2	<u>Navigation Menu (page 18)</u>	<p>Navigation menu is vertical bar on the left side. The menu contains some default items as well as some optional (customized) items.</p> <p>Note that the toolbar and the navigation menu don't specifically belong to the Welcome page. They are the basic Portal components and are always available.</p>
3	Welcome Page	<p>Self-Service Portal home page. It consists of the following elements: Dashlets (page 20), toolbar (page 18) and the navigation menu (page 18). Note that the Welcome Page is always a matter of individual customization.</p> <p>Also note that Self-Service Portal supports multiple Portal Pages which a single Welcome Page derives from. Every Portal Page is a collection of selected dashlets.</p> <p>See also the examples below.</p>

4	Dashlets (page 20)	<p>All the elements in the Self-Service Portal Page:</p> <ul style="list-style-type: none">• Search (page 20)• Info tiles (page 21)• News (page 23)• Current IT disruptions (page 24)• Chatbot (page 25)• Other dashlets <p>These elements as well as other dashlets created by your admin can be combined within one or multiple Portal Pages.</p>
5	Drawer	<p>A panel sliding in from the right part of the current page.</p> <p>There are two drawer types:</p> <ul style="list-style-type: none">• Detail view drawer For example, the details of the current IT disruptions (page 24).• Form drawer For example, a ticket creation form (page 43). <p>Typically if you click a specific element, a drawer slides in from the right.</p>



USU Self-Service Portal can be configured in two ways:

1. All Portal pages and configurations are built from scratch.
2. USU GmbH imports a standard package of different portal pages and configurations.
This standard package can be used as the basis for the customer-specific content.

3.1. Examples of various configurations of the Welcome and Portal Pages

Depending on the dashlet configurations, the Welcome Page and Portal Page can be composed in quite different ways.

3.1.1. Welcome Page configuration: Example 1

The screenshot shows the USU Welcome Page for user Alexander. The header includes the USU logo and the user's name. The main content area features a large banner with the text "Hello Alexander, how can we help you today?" and a search bar. Below the banner, there are four large tiles displaying key metrics: 36 Open tickets, 1 Resolved tickets, 28 Open Requests, and 3 Open tasks. Each tile has a "Create Ticket" or "Open list" button. The bottom section contains two columns of news and current IT disruptions. The left column lists news items with titles, dates, and channels. The right column lists current IT disruptions with titles, status, and dates.

3.1.2. Welcome Page configuration: Example 2

The screenshot shows the USU Welcome Page for user Alexander Werner. The header includes the USU logo and the user's name. The main content area features a large banner with the text "Hello Alexander, how can we help you today?" and a search bar. Below the banner, there are three main sections: "My tickets", "My Requests", and "Current IT disruptions". The "My tickets" section lists several tickets with their status, priority, and date. The "My Requests" section lists several requests with their status, priority, and date. The "Current IT disruptions" section lists several disruptions with their status and date. Each section has a "Create Ticket" or "Request Service" button and a link to "more items".

3.1.3. Welcome Page configuration: Example 3

3.1.4. Portal Page configuration: Example 1

3.1.5. Portal Page configuration: Example 2

USU Alexander AW

My Self-Service - Compact

My tickets

- IN-0002414 | VOIP not working
Waiting for Major Incident (IN) 3 Medium 02/01/2023 15:34:40
- IN-0002234 | Testticket
Created (IN) 3 Medium 01/25/2023 10:24:28
- IN-0001504 | Second display is flickering
Created (IN) 3 Medium 12/07/2022 14:36:29
- IN-0001469 | No access to postcode area 7 in CRM system
Created (IN) 3 Medium 12/02/2022 07:26:22
- IN-0001390 | Test resolved ticket
User Not Accepted (IN) 3 Medium 11/28/2022 16:09:21
- IN-0001188 | Suggested solution rejection test
User Not Accepted (IN) 3 Medium 11/14/2022 09:28:57

Create Ticket > 30 more items

News

News with external link to images not working
[12/01/2022 18:14:42 / Channel: End User]
News with external link to images not working. And here we have some more text... An...

New image test for max-width
[11/02/2022 10:30:55 / Channel: End User]
This is a new image to test the max-width: {<CLIENT_BASE_PATH>/usm-adapter/ima...

Recall: Blue screen on new laptop model ABC 8750
[10/27/2022 08:14:54 / Channel: End User]
The newly launched laptop model ABC 8750 keeps displaying a bluescreen. The batch r...

Picture test
[10/17/2022 13:45:03 / Channel: End User]
This is a test to find out, whether images can be scaled in USM and if the images then ...

Test news item with more pictures
[12/02/2021 09:30:00 / Channel: End User]
Testing a news item with more pictures in it. If this works, you should be able to see so...

VoIP telephone system malfunction - solution in progress
[11/23/2021 13:16:00 / Channel: End User]
Due to a malfunction of the VoIP telephone system, it is currently not possible to receiv...

Current IT disruptions

VOIP not working
(IN-0000855) Created (IN) 08/29/2022 15:04:57

Printer network disruption
(IN-0000596) In Progress (IN) 03/10/2022 14:37:57

VoIP telephone system malfunction
(IN-0000488) In Progress (IN) 11/23/2021 13:15:40

VoIP-Telefonanlage gestört
(IN-0000075) In Progress (IN) 07/16/2021 15:36:52

Company network has massive disruptions
(IN-0000074) In Progress (IN) 07/16/2021 15:33:55

Großflächige Druckerstörung
(IN-0000073) Assigned To (IN) 07/16/2021 15:32:34

<< < 1 of 2 > >>

3.2. Toolbar

USU toolbar is an inherent part of the Self-Service Portal window.



The toolbar and the navigation menu don't specifically belong to the Welcome page. They are the **basic Portal components** and are always available.



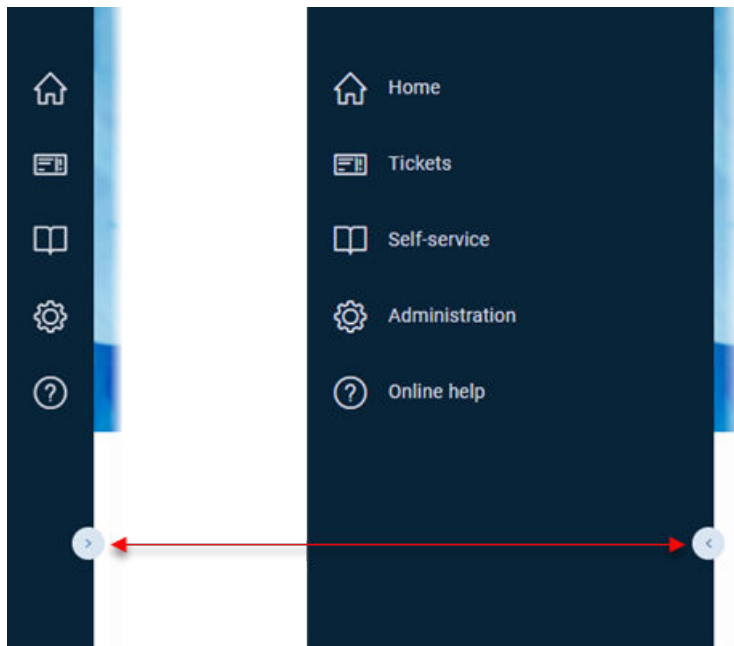
1	<p>USU logo.</p> <p>Click the USU logo to return to the Welcome Page.</p>
2	<p>User profile.</p> <p>Click the user profile to open the User profile menu.</p> <p>The menu contains the following items:</p> <ul style="list-style-type: none">• Profile - opens a new browser tab with a page of the USU User management application where you can change your password, select your time zone and the language of the Portal GUI.• About - opens a dialog with the application data such as the product name, version and build.• Logout - logs you out of the Self-Service Portal.

3.3. Navigation menu

The expandable **vertical menu** on the left side contains two default items if you have the corresponding admin rights: **Online Help** and **Administration**. **Home**, **Tickets** and **Self service** are part of the USU standard package content.



The toolbar and the navigation menu don't specifically belong to the Welcome page. They are the **basic Portal components** and are always available.



- Click the **arrow symbol** on the vertical line to expand and collapse the menu panel.

Home	Takes you to the starting point of the Self-Service Portal, which is usually the Welcome Page.
Tickets	Contains the dashlets related to ticketing. You can see the and work with a list of open tickets, solutions to confirm or all tickets with all the details.
Self-service	Lists all the predefined Portal pages for both the end-users and the managers depending on the individual rights. Here you can switch between the manager and end-user self service welcome pages.
Administration	<p>Contains specific administrator settings, i.e. those which can be administered directly here in the application: A Page designer, Dashlet editor, Drawer editor, Global configuration, Toolkit, User management and Instances.</p> <p>Note that end users will not see this menu entry. See the USU Self-Service Portal admin documentation for a full description of these items.</p>
Online help	Opens a new browser window with the Self-Service Portal online help.



The overall menu structure can be also individually customized by the administrators.

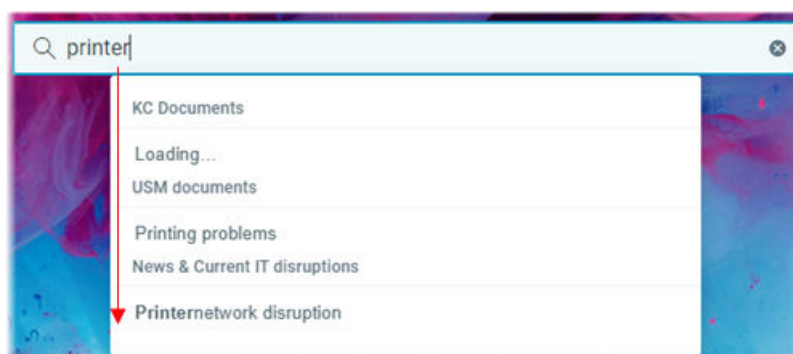
3.4. Dashlets

Dashlets are the elements for displaying information and providing actions within a Portal Page. Note that one dashlet is connected to one source system. For this reason, a Portal Page can show data from different source systems. In addition to the dashlets delivered in the standard package, the admin can define dashlets of the same type with individual content.

The following dashlets are available: **Search**, **Info tiles**, **News**, **Current IT disruptions** and **Chatbot**.

3.4.1. Search

The **Search box** is a central dashlet located in the middle of the Welcome Page. It gives you a quick and convenient way of finding solution documents, news entries, current IT disruptions, depending on the content and search configuration provided by your admin. All search results are categorized according to the type of content.



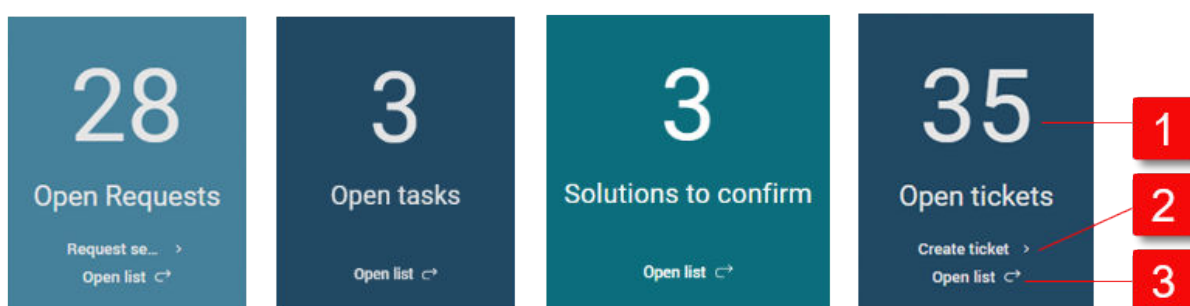
- Type your search term and press the **enter** key to submit the search. For details, see [Using the search \(page 27\)](#).

3.4.2. Info tiles

The purpose of the **Info tiles** is to give you a quick overview of tickets and requests and also to provide a quick access to the common actions.

The following Info tiles are available as part of the standard package:

- **Open requests**
- **Open tasks**
- **Solutions to confirm**
- **Open tickets**



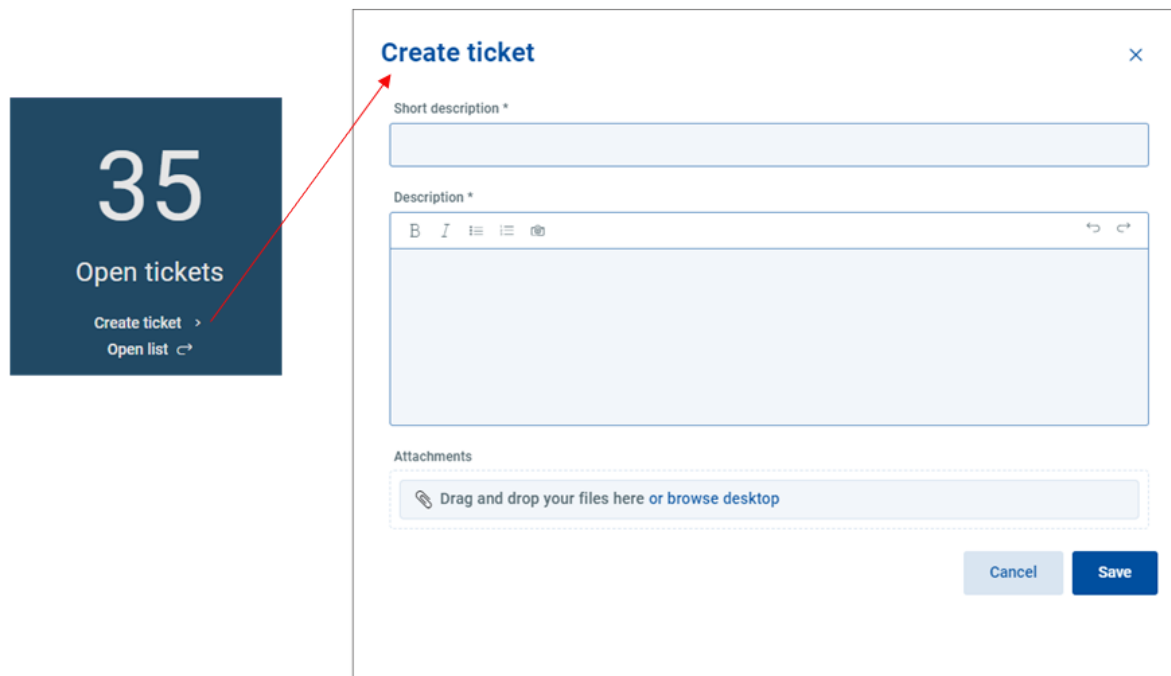
1	Total number	The total number expresses the overall number of open tickets, resolved tickets, open request or open tasks. It is always displayed in big white numbers to grab attention so that you can immediately check how many tickets already have a proposed solution for your issue or check the status of the open shop requests.
2	Action button	The action button (page 22) allows you to start an action immediately from the Info tile without the need to open a menu. Typically you can create a ticket or create a service request using the action buttons.
3	Link to the detailed list	The link (page 22) allows you to quickly access the full list of tasks, tickets or requests without the need to open a menu.



The Manager user usually uses different set of Info tiles compared to the End-user.

3.4.2.1. Action buttons

- Click the selected **action** to do something.
For example, start creating a ticket.



Create ticket [X]

Short description *

Description *

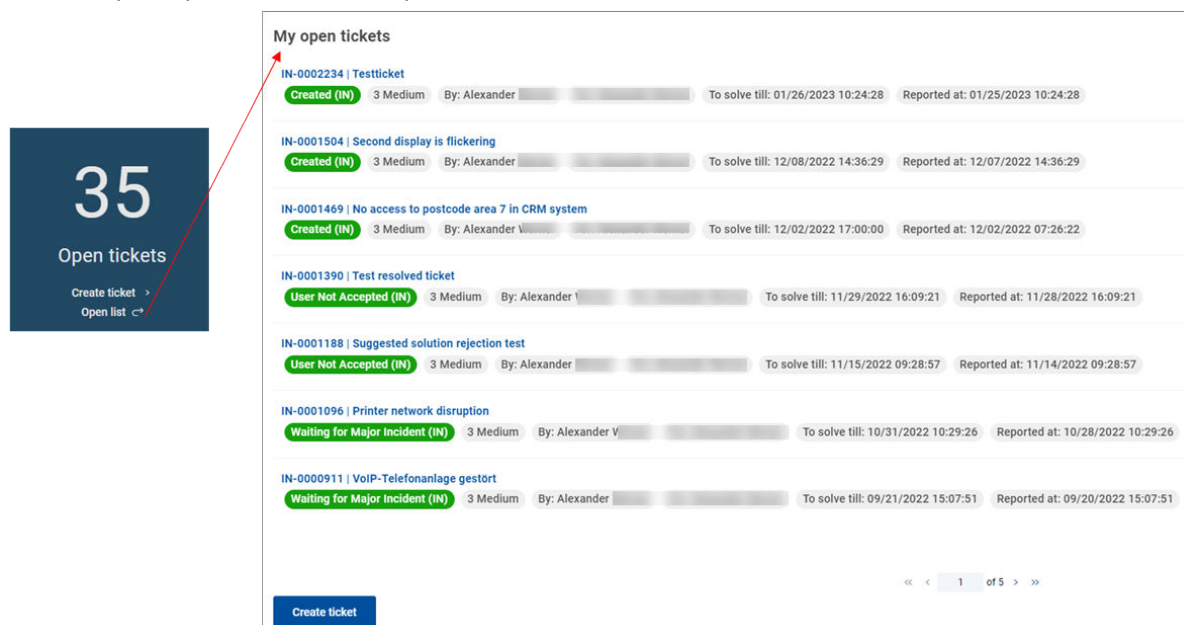
Attachments

Drag and drop your files here or browse desktop

Cancel Save

3.4.2.2. Link to the detailed list

- Click **Open list** in a specific tile to open the full list of required objects.
For example, open a list of the opened tickets.



My open tickets

IN-0002234 Testticket	Created (IN)	3 Medium	By: Alexander	To solve till: 01/26/2023 10:24:28	Reported at: 01/25/2023 10:24:28
IN-0001504 Second display is flickering	Created (IN)	3 Medium	By: Alexander	To solve till: 12/08/2022 14:36:29	Reported at: 12/07/2022 14:36:29
IN-0001469 No access to postcode area 7 in CRM system	Created (IN)	3 Medium	By: Alexander	To solve till: 12/02/2022 17:00:00	Reported at: 12/02/2022 07:26:22
IN-0001390 Test resolved ticket	User Not Accepted (IN)	3 Medium	By: Alexander	To solve till: 11/29/2022 16:09:21	Reported at: 11/28/2022 16:09:21
IN-0001188 Suggested solution rejection test	User Not Accepted (IN)	3 Medium	By: Alexander	To solve till: 11/15/2022 09:28:57	Reported at: 11/14/2022 09:28:57
IN-0001096 Printer network disruption	Waiting for Major Incident (IN)	3 Medium	By: Alexander	To solve till: 10/31/2022 10:29:26	Reported at: 10/28/2022 10:29:26
IN-0000911 VoIP-Telefonanlage gestört	Waiting for Major Incident (IN)	3 Medium	By: Alexander	To solve till: 09/21/2022 15:07:51	Reported at: 09/20/2022 15:07:51

« < 1 of 5 > »

Create ticket

3.4.3. News

Self-Service Portal **news** is a centralized news hub which contains the news created by your IT Service organization and is usually used to inform you about the planned maintenance, known issues, announcements, etc.

News

News with external link to images not working

[12/05/2022 18:14:42 / Channel: End User]

News with external link to images not working. And here we have some more text... And h...

New image test for max-width

[11/02/2022 10:30:55 / Channel: End User]

This is a new image to test the max-width. . Please make an appointment for the exchange with IT.'

- Click **Cancel** to close the drawer.



A number of news is currently limited to 4 items on the Welcome Page.

3.4.4. Current IT disruptions

The list of **Current IT disruptions** gives you a quick overview of the major IT issues affecting multiple users and their current status.

The Current IT disruptions can be posted on multiple pages. Use the arrow buttons below to flip through the individual pages.

The screenshot shows the 'Current IT disruptions' page with a list of four items. A red arrow points from the 'Printer network disruption' item to a detailed view window.

Current IT disruptions

- VOIP not working**
IN-0000855 Created (IN) 08/29/2022 15:04:57
- Printer network disruption**
IN-0000596 In Progress (IN) 03/10/2022 14:37:57
- VoIP telephone system malfunction**
IN-0000488 In Progress (IN) 11/23/2021 13:15:40
- VoIP-Telefonanlage gestört**
IN-0000075 In Progress (IN) 07/16/2021 15:36:52

Navigation: << < 1 of 2 > >>

IN-0000596 | Printer network disruption

Priority: 3 Medium Status: In Progress (IN)

Description: There is a problem with the print server that causes a network malfunction of the printers. The malfunction affects all locations.

The diagram shows three laptops connected to a central 'Printserver' which is marked with a red 'X' and a printer below it.

We are already working on a solution.

Buttons: Cancel, Affected too

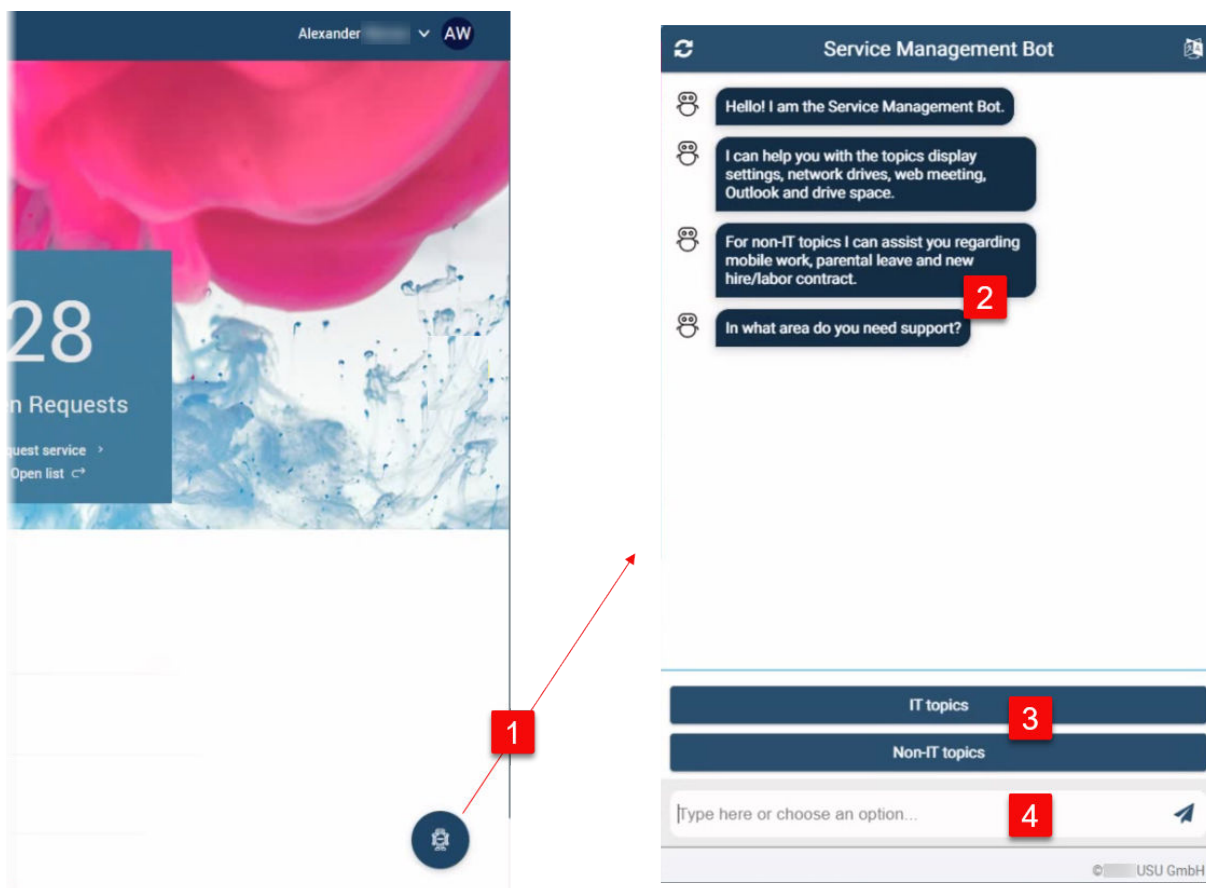
To read the current IT disruptions in full:

- Click the selected **IT disruption**.
The drawer slides in from the right.
Here you can read a full description of the selected disruption.
- Click **Cancel** to close the drawer.

3.4.5. Chatbot

The **Chatbot** is an integral application which simulates human-like conversations with users via text messages. It is an optional solution for urgent issues when you need guidance in narrowing down the reason for your issue and finding a solution.

The Portal Chatbot is either able to conduct a guided conversation or to run self-help actions directly on the basis of the entered keyword.



1	Chatbot icon	If it has been customized, the Chatbot icon is located in the the bottom right corner of the screen. Click the icon to launch the Chatbot window.
2	Messages	The chatbot messages are listed vertically in the message window. Note that the chatbot dialogs are tailored for a specific customer and his environment.
3	Categories	You can either start the Chatbot conversation here by clicking through the predefined dialog categories (for example, IT topics vs. Non-IT topics). Alternatively, you can use the Message input field to enter a keyword.
4	Message input field	Start the Chatbot dialog here by entering a question or a search term. The Chabot AI analyzes the keywords and starts the correct dialog which leads to the adequate solution.

For details, see [Chatbot dialogs \(page 53\)](#).

4. Working with the portal

This section covers the **basic work** with Self-Service Portal as well as miscellaneous aspects of the **specific use cases**. The individual topics are formed as a simple how-to instructions so that you can use the Portal productively from day one.

Active use of the Self-Service Portal can be narrowed down to the following use cases:

- [Using the search \(page 27\)](#)
- [Reading the news \(page 38\)](#)
- [Handling the Current IT disruptions \(page 40\)](#)
- [Tickets and ticketing \(page 42\)](#)
- [Displaying and extending the existing tickets \(page 45\)](#)
- [Opening Service Shop to create a service request \(page 51\)](#)
- [Confirming or rejecting a ticket solution \(page 49\)](#)
- [Chatbot conversations \(page 53\)](#)
- [Manager Self-Service \(page 57\)](#)

4.1. Searching

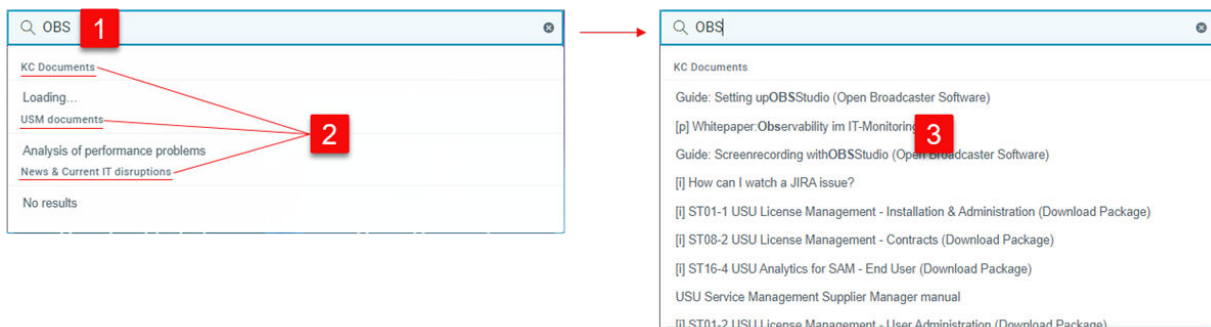
When you come to USU Self-Service Portal, basically you want to solve an issue. The **Search** or **Chatbot (page 53)** are two most commonly used entry points in this case.

Specifically you can use the search in:

- [News & Current IT disruptions \(page 30\)](#),
- [Knowledge Center documents \(page 32\)](#)
- [USM documents \(page 34\)](#).
- [Customizable item list \(page 37\)](#)

4.1.1. Searching in the Welcome Page

The Search box dashlet in the Welcome Page is the central building block of the USU Self-Service Portal. With this feature, **searching** in the Portal is a very straightforward process. All you need to do is just **type** what you are interested in finding into the search box and press **Enter**. The actual search results sorted by categories will load in a small search window below the search box.



1	Search term	Enter your term into the search box and press Enter . Use the cross icon on the right to delete the search term.
2	Search categories	<p>For a better overview, the search results are sorted by the following categories:</p> <ul style="list-style-type: none"> • Knowledge Center documents • USM documents • News & Current IT disruptions <p>Note that the category names can be customized.</p>
3	Search result window	<p>The window contains all the search results sorted by the categories.</p> <ul style="list-style-type: none"> • Use the scroll bar to scroll down the window provided that the list of search results is too long. • If you click a search result, the drawer with detailed info opens allowing you to work on your findings further.

4.1.2. Searching in the customizable item list

It is also possible to perform the search in most of the customizable item lists across the Portal.

My open tickets

CA-0000079 | Mein SAP-Zugang geht nicht mehr

Created (CA) Call 3 Medium

To solve till: 10/13/2023 09:44:23

Reported at: 10/12/2023 09:44:23

IN-0004342 | Oracle not available

Waiting for Major Incident (IN) Incident 3 Medium

To solve till: 10/13/2023 09:17:09

Reported at: 10/12/2023 09:17:09

IN-0004256 | VoIP telephone system malfunction

Waiting for Major Incident (IN) Incident 3 Medium

To solve till: 10/03/2023 13:06:28

Reported at: 10/02/2023 13:06:28



This search type works independently of the Welcome Page search.

The following customizable item lists with the search functionality are available:

- My open tickets
- My resolved tickets
- My tickets all
- My requests

For details, see [Customizable item list \(page 37\)](#).

4.1.3. News & current IT disruptions

News & the current IT disruptions are two main dashlets on the Welcome Page but all of the news and the current IT disruptions are coming from by definition. It means that the same news are visible in the top right-hand corner in the application and the current IT disruptions equal to USM Major Incidents.

4.1.3.1. Searching for the news

To search for the news or current IT disruptions by a search term:

1. Enter a key **term** into the search box.
2. Press **Enter**.
The search results are listed below in the **search result window**.
3. Scroll down to the **News & Current IT Disruptions** category.

News

News with external link to images not working
[12/05/2022 18:14:42 / Channel: End User]
News with external link to images not working. And here we have some more text... And h...

New image test for max-width
[11/02/2022 10:30:55 / Channel: End User]
This is a new image to test the max-width. 08/29/2022 15

Printer network disruption
IN-0000596 In Progress (IN) 03/10/202

VoIP telephone system malfunction
IN-0000488 In Progress (IN) 11/23/202

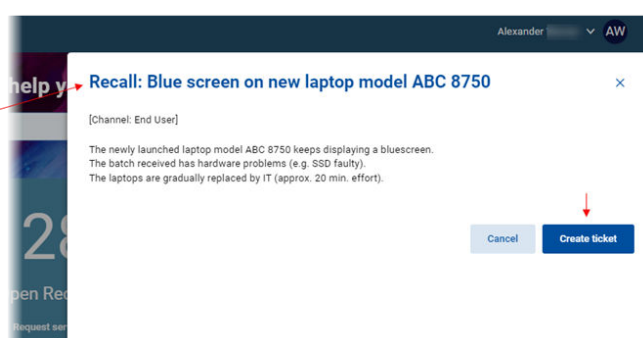
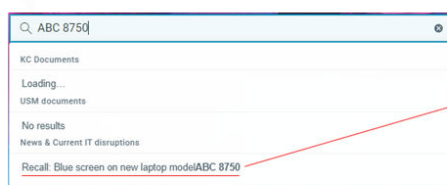
Here you can find if the search term matches some news and current IT disruptions. Note that the news found under this category matches the news in the [News dashlet \(page 23\)](#).

4. Click the selected news.
A drawer with the news details opens on the right.

4.1.3.2. Searching and creating a ticket from the news

To create a ticket directly from the news:

1. Enter a key **term** into the search box.
2. Press **Enter**.
The search results are listed below in the **search result window**.
3. Scroll down to the **News & Current IT Disruptions** category.
Here you can find if the search term matches some news.
4. Click the result (supposing there is any).
A drawer with the news details opens.

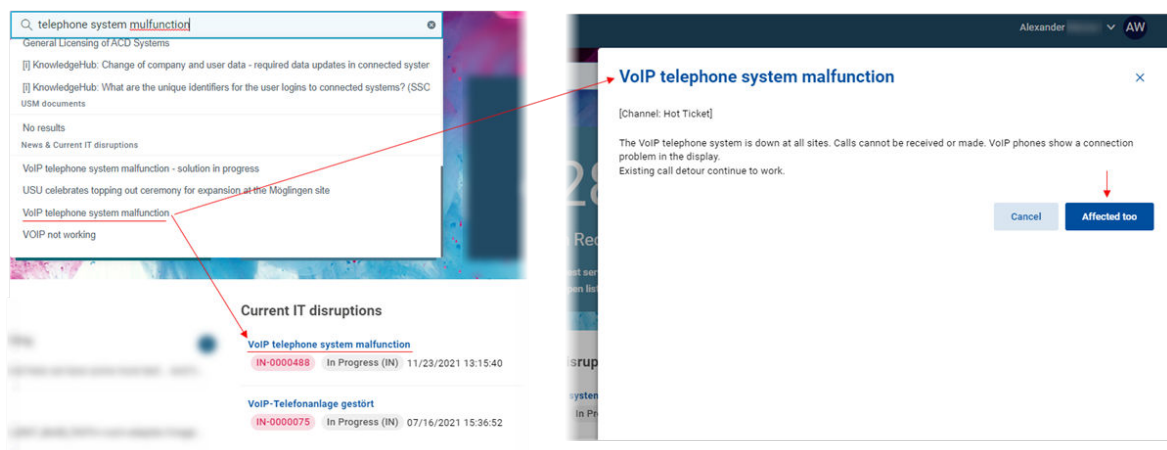


5. Click **Create ticket**.
The **Create ticket** dialog opens allowing you to create a ticket immediately.

4.1.3.3. Searching and creating an "affected too" ticket from the current IT disruption

To create a "me too" ticket from the current IT disruption:

1. Enter a key **term** into the search box.
2. Press **Enter**.
The search results are listed below in the **search result window**.
3. Scroll down to the **News & Current IT Disruptions** category.
Here you can find if the search term matches some current disruptions (Major Incidents).
4. Click the result.
A drawer with the disruption details of the Major Incident opens.



- Click **Affected too**.

Now the **"affected too" ticket** has been successfully created. The ticket is associated with the superior Major Incident automatically.

4.1.4. Knowledge Center documents

Knowledge Center (KC) is a central repository of **documents** which provide you with an easy access to the frequently used solution descriptions.

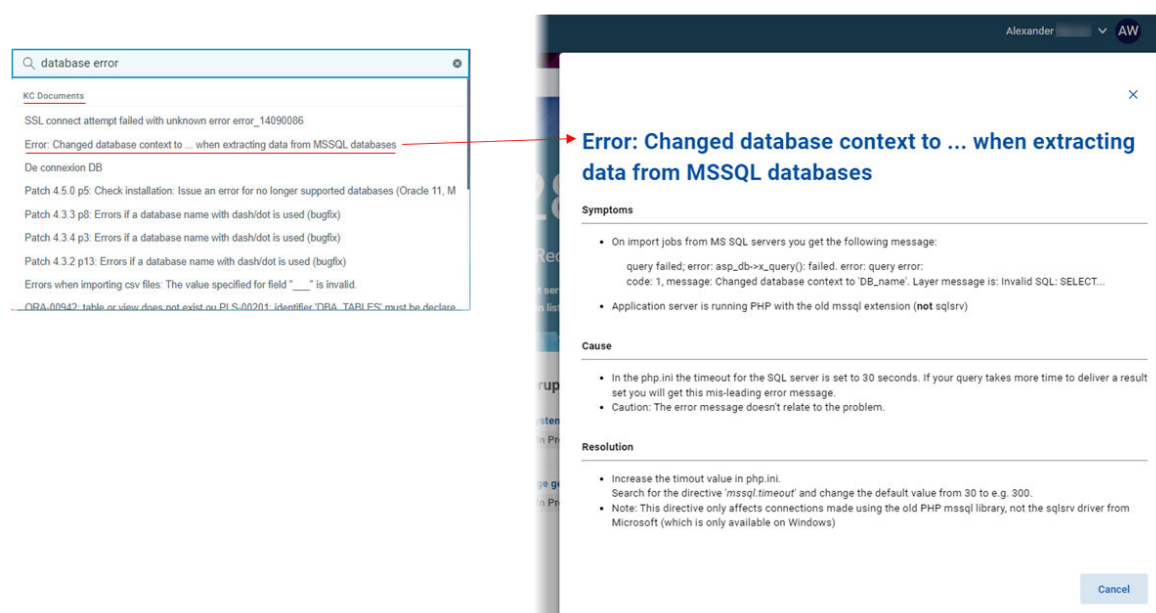


Knowledge Center documents are only available if your company uses USU Knowledge Center and if it is connected to the Self-Service Portal.

4.1.4.1. Searching for Knowledge Center documents

To search for the Knowledge Center documents by a specific term:

- Enter a key **term** into the search box.
- Press **Enter**.
The search results are listed below in the **search result window**.
- Scroll down to the **KC Documents** category.
Here you can find if the search term matches some KC documents.
- Select the required KC document.



- Click the document.
The corresponding KC document opens in a drawer on the right.

4.1.4.2. Searching and creating a ticket from the Knowledge Center document

To create a ticket directly from the KC document:

- Enter a key **term** into the search box.
- Press **Enter**.
The search results are listed below in the **search result window**.
- Scroll down to the **KC Documents** category.
Here you can find if the search term matches some KC documents.
- Select the required KC document.
- Click the document.
The corresponding KC document opens in a drawer on the right.
If you don't find the right solution, you can create a ticket from here immediately.
- Click **Create ticket**.
The **Create ticket** dialog opens allowing you to create a ticket.

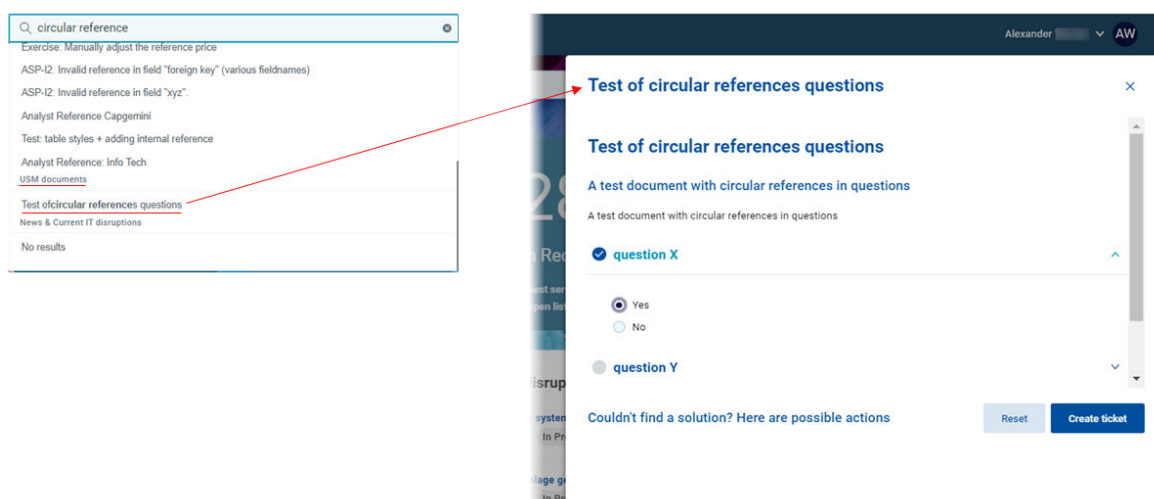
4.1.5. USM documents

You can also search for the documents coming from the **Knowledge Manager** (USM).

4.1.5.1. Searching for USM documents

To search for USM documents by a specific term:

1. Enter a key **term** into the search box.
2. Press **Enter**.
The search results are listed below in the **search result window**.
3. Scroll down to the **USM Documents** category.
Here you can find if the search term matches some USM documents.
4. Select the required USM document.

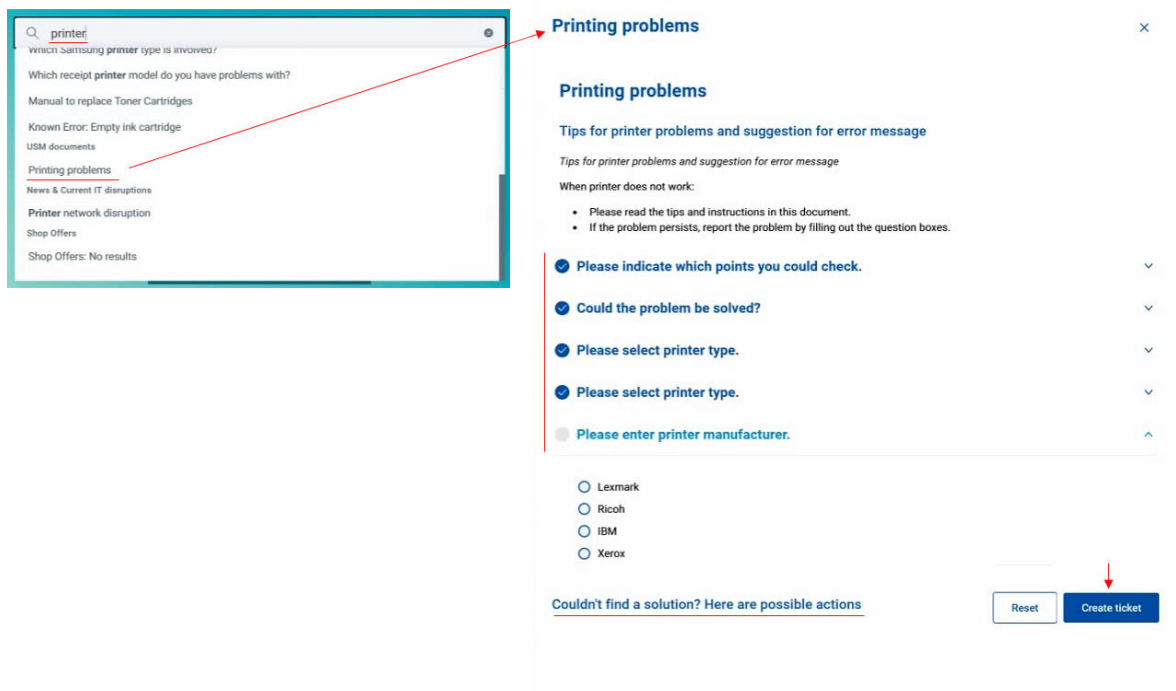


5. Click the document.
The corresponding USM document opens in a drawer on the right.

4.1.5.2. Searching and creating a ticket from the USM document

To create a ticket directly from the USM document:

1. Enter a key **term** into the search box.
2. Press **Enter**.
The search results are listed below in the **search result window**.
3. Scroll down to the **USM Documents** category.
Here you can find if the search term matches some USM documents.
4. Select the required USM document.



5. Click the document.
The corresponding active USM document opens in a drawer on the right.
The document usually contains an issue resolution dialog or a simple checklist to guide you to the solution. If you don't find the right solution, you can create a ticket directly from here.
6. Click **Create ticket**.
The **Create ticket** dialog opens allowing you to create a ticket immediately.

Create ticket ×

Short description *

printer

Description *

B *I*

Printing problems

q1: Please indicate which points you could check.

- a: The printer queue is empty

q2: Could the problem be solved?

- a: No

q3: Please select printer type.

- a: Local printer

q4: Please select printer type.

- a: Color printer

Attachments

[Drag and drop your files here or Select files](#)

Cancel

Save

Note that not only the Short description field takes over the original search term but also all the questions and answers you have just given are transferred into the ticket Description.

- Click **Save**.

A ticket has been created.

4.1.6. Customizable item list

The search in the customizable item list is the simplest and the most intuitive search type: You can perform a quick ad hoc search for a keyword using a simple search field at the top of the list.

4.1.6.1. Example: Searching for an open ticket

To search for an open ticket:

1. Click **Tickets > My open tickets** in the navigation menu.
or
Click **Open list** in the **Open tickets** Info tile.
My open tickets dialog opens.
2. Enter a keyword into the search field and press **Enter**.

The screenshot shows the 'My open tickets' dialog. At the top, there is a search bar with the text '4458' entered. Below the search bar, the results are displayed. The first result is 'IN-0004458 | Printing problems'. Below this, there are several status tags: 'Created (IN)', 'Incident', '3 Medium', 'By:', 'For:', 'To solve till: 10/27/2023 11:23:09', and 'Reported at: 10/26/2023 11:23:09'.

Now the search results show the exact hit.



To see the full list again, delete the keyword and press **Enter**.

4.1.6.2. Example: Searching for my resolved tickets to be confirmed

To search for the resolved tickets to be confirmed by a specific term:

1. Click **Tickets > Solutions to confirm** in the navigation menu.
or
Click **Open list** in the **Solutions to confirm** Info tile.
Solutions to confirm dialog opens.
This dialog is split in two parts: **Tickets with solutions for confirmation** and **My resolved service requests for confirmation**. The former stands for the incidents and the latter for the service requests. You can search independently in either of them.

The screenshot shows the 'Solutions to confirm' dialog, which is split into two panels. The left panel is titled 'Tickets with solutions for confirmation' and shows a search for 'monitor'. The first result is 'IN-0003970 | My monitor flickers'. Below this, there are status tags: 'User Informed (IN)', '3 Medium', 'To solve till: 07/20/2023 17:00:00', and 'Reported at: 07/19/2023 17:39:06'. The right panel is titled 'My resolved service requests for confirmation' and shows a search for 'My headset doesn't work'. The first result is 'SR-0000002 | My headset doesn't work'. Below this, there are status tags: 'User Informed (SR)', '3 Medium', 'To solve till: 07/20/2023 17:00:00', and 'Reported at: 07/19/2023 17:16:15'.

2. Enter a keyword into the search field and press **Enter**.
Now the search results show the exact hit.



To see the full list again, delete the keyword and press **Enter**.

4.2. Reading the news

Reading the news comes down to two possible approaches: You can easily access all the news right from the [Welcome Page \(page 13\)](#) as it is one of the dashlets or use the **search** to find specific news.



A number of displayed news depends on the height of the News dashlet. It is currently limited to 4 items on the Welcome page of the standard package.

4.2.1. Reading the news on the Welcome Page

To read the news on the Welcome Page:

1. Go to the Welcome Page.
2. Locate the **News dashlet** to skim through the latest news.

The screenshot shows the USU portal interface. At the top, there's a header with a user profile 'Alexander Werner' and a search bar. Below the header, the main content area is divided into several sections. On the left, there are two large cards: '46 Open tickets' and '1 Resolved tickets'. Below these, there's a 'News' section. The 'News' section displays a list of news items. One item is highlighted with a red arrow: 'SSD replacement required for laptop model NB5874'. This item is expanded, showing a detailed description of the issue and a QR code for more information. The detailed view includes the title, date, channel, and a description of the problem (bluescreen on a newly launched laptop model NB5874). It also mentions that the issue can be exchanged by IT (approx. 20 min. effort) and provides a link to the Windows stopcode page. The status is '25% complete'.

3. Click the selected news.

The news **drawer** slides in from the right.

Here you can read a full description of the selected topic.

- Click **Cancel** to close the drawer.

4.2.2. Searching for the news

To search for the news:

- Enter a key **term** into the search box.

- Press **Enter**.

The search results are listed below in the **search result window**.

- Scroll down to the **News & Current IT Disruptions** category.

The screenshot shows the search results for 'ABC 8750'. The search bar at the top contains the text 'ABC 8750'. Below the search bar, there is a list of results. The first result is 'Recall: Blue screen on new laptop model ABC 8750'. A red arrow points from this result to the 'News' section below. The 'News' section shows a list of news items. The first item is 'Recall: Blue screen on new laptop model ABC 8750'. The second item is 'New image test for max-width'. The third item is 'News with external link to images not working'. The 'Current IT disruptions' section shows a list of disruptions. The first item is 'VOIP not working'. The second item is 'Printer network disruption'. The third item is 'VoIP telephone system malfunction'.

Here you can find if the search term matches some news and current IT disruptions.

Note that the news found under this category matches the news in the [News dashlet \(page 23\)](#).

- Click the selected **news**.
A drawer with the news details opens on the right.

4.3. Current IT disruptions including “Affected too”

Current IT disruptions is a dashlet on the [Welcome Page \(page 13\)](#) so it can be easily accessed from there or you can use the search to find a specific disruption.

In the background, the current IT disruptions equal to the Major Incidents coming from . From the Self-Service Portal, you can quickly create an **"affected too"** ticket associated with the superior Major Incident.

4.3.1. Reading the current IT disruptions on the Welcome Page

To read the current IT disruptions on the Welcome Page:

1. Go to the Welcome Page.
2. Locate the **Current IT disruptions dashlet** to check the displayed current IT disruptions.

Current IT disruptions

VOIP not working
IN-0000855 Created (IN) 08/28/2022 15:04:57

Printer network disruption
IN-0000596 In Progress (IN) 03/10/2022 14:37:57

VoIP telephone system malfunction
IN-0000488 In Progress (IN) 11/23/2021 13:15:40

VoIP-Telefonanlage gestört
IN-0000075 In Progress (IN) 07/16/2021 15:36:52

<< < 1 of 2 > >>

IN-0000596 | Printer network disruption

Priority
3 Medium

Status
In Progress (IN)

Description
There is a problem with the print server that causes a network malfunction of the printers.
The malfunction affects all locations.

The diagram shows multiple laptops connected to a central **Printserver** which has a red **X** over it, indicating a network issue.

We are already working on a solution.

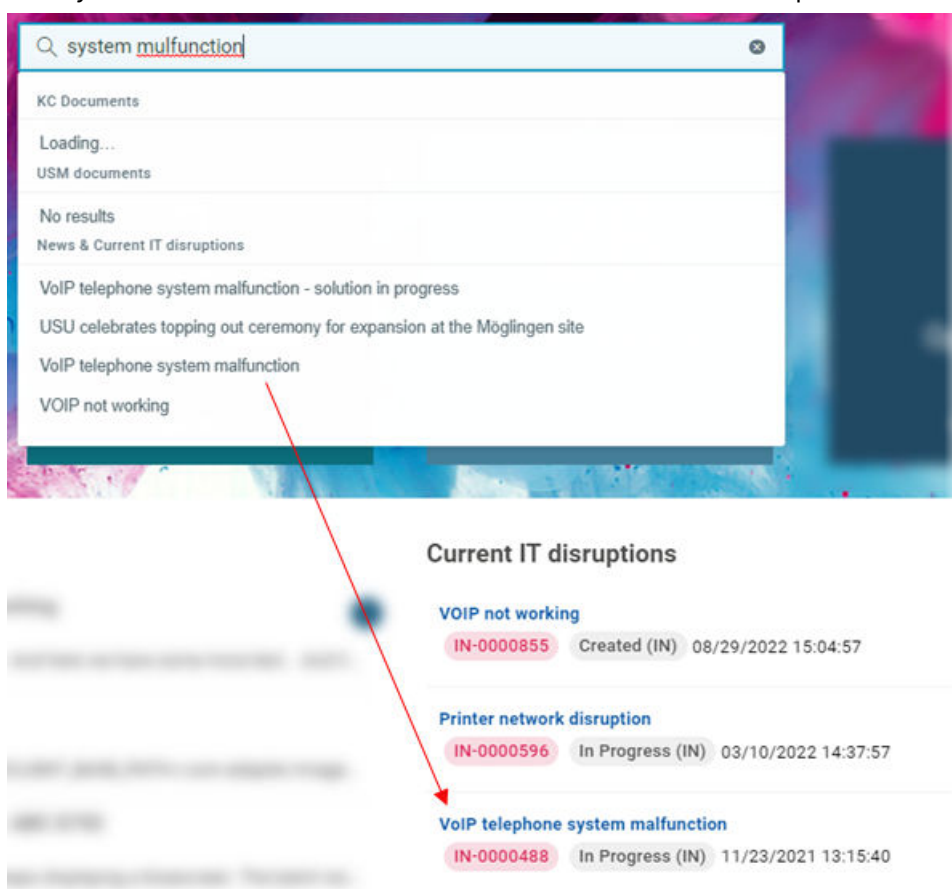
Cancel Affected too

3. Click the selected current IT disruption.
The **drawer** opens on the right.
Here you can read a full description of the selected disruption.
4. Click **Cancel** to close the drawer.

4.3.2. Searching for the current IT disruption

To search for the current IT disruption:

1. Enter a key **term** into the search box.
2. Press **Enter**.
The search results are listed below in the **search result window**.
3. Scroll down to the **News & Current IT Disruptions** category.
Here you can find if the search term matches the desired disruption.

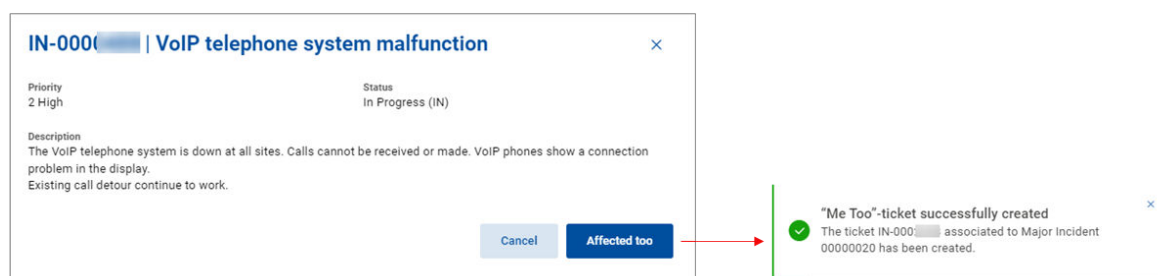


4. Click the selected disruption.
A drawer with the current IT disruption details opens on the right.

4.3.3. Creating an "affected too" ticket from the current IT disruption

To create an "affected too" ticket from the current IT disruption:

1. Click and open a current IT disruption.
A drawer with the disruption details opens.
2. Click **Affected too**.



Now the "affected too" ticket has been successfully created.
The ticket is associated with the superior Major Incident automatically.

4.4. Tickets and ticketing

One of the most important functions of the Self-Service Portal is an effective management of the basic **ticketing flow**.

Dealing with **tickets** means that you work with the Portal [Info tiles \(page 21\)](#). They are the actual starting point for creating a ticket, displaying the existing tickets as well as confirming or rejecting a ticket solution.

4.4.1. Ticket type differentiation

In the front end, a user creates a **Call** ticket type (not an Incident) when creating a new issue using Self-Service Portal. Only later the individual calls are further classified as **Incidents** and **Service Requests** by the Service Desk.

Term	Explanation
Call	Refers to a call to the Service Desk. There are two call categories: 1. Incidents 2. Service Requests
Incident	An unplanned interruption to a service or reduction in the quality of a service.
Service Request	A requirement for delivery of a product or service.

My open tickets

Search by ticket number, title and description

CA-0000090 | printer
 Created (CA) **Call** 3 Medium To solve till: 10/30/2023 09:41:05 Reported at: 10/27/2023 09:41:05

IN-0004458 | Printing problems
 Created (IN) **Incident** 3 Medium To solve till: 10/27/2023 11:23:09 Reported at: 10/26/2023 11:23:09

IN-0004453 | Test incident with rich text description
 User Not Accepted (IN) **Incident** 3 Medium To solve till: 10/27/2023 09:57:33 Reported at: 10/26/2023 09:57:33



This is an automatic process which the Self-Service Portal end-user cannot actively control.

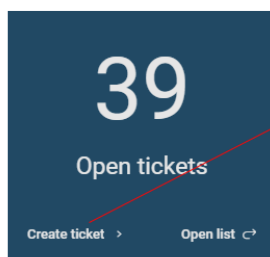
4.4.2. Creating a ticket: Compact form



It depends on the admin settings if the end user is provided with the compact ticket form or [full ticket form \(page 44\)](#).

To create a ticket in a compact form:

1. Go to the **Open tickets** Info tile.
2. Click **Create ticket**.
The **Create ticket** compact dialog opens.



Create ticket [X]

Short description *

Display switches on/off

Description *

B I [List] [Link] [Image]

The external monitor switches on and off when connected to my laptop. |

Attachments

Drag and drop your files here or [browse desktop](#)

Cancel Save

3. Fill in a short description and optionally add an attachment.
Note that you can also copy and paste a picture directly in the description field.

- Click **Save**.



As you save a new ticket, the counter on the tile adds a number to the overall count immediately.

4.4.3. Creating a ticket: Full form



It depends on the admin settings if the end user is provided with the [compact ticket form \(page 43\)](#) or full ticket form. Note that the full form is just another way what the create ticket form can look like.

To create a ticket in a full form:

- Click **Create ticket** in a dialog.
The **Create ticket** full-scale dialog box opens.

The screenshot shows the 'My Self-Service' portal with a list of open tickets. A red arrow points from the 'Create ticket' button in the portal to the 'Create ticket' dialog box. The dialog box contains the following fields:

- Short description ***: The printer prints yellow colors only
- Description ***: When printing anything, only the yellow stripes are printed on the right side of the paper.
- Type ***: Complaint
- Impact ***: 2 High
- Reported for ***: 1st Level Support Reference, Mr. | vm@usu.de | REF...
- System**: PC_500002 | Workstation Desktop Windows | Active
- Service**: SE-0010091 | Email Service for Employees | Released
- Attachments**: Drag and drop your files here or browse desktop
- Buttons**: Cancel, Save

This dialog contains the other specific fields related to the ticket creation: Description, type, impact, reported for, system and service.

- Fill in at least the mandatory fields.
- Click **Save**.

4.4.4. Displaying and extending the existing tickets

A **ticket** contains information that is relevant to the Incident, Problem or Change request. When you open a ticket details, you can see the time it was reported, the impact and priority, a type of the ticket, links to the persons involved in solving the ticket and one or more ticket descriptions. In addition, you can add attachments and comments.



Ticket descriptions are also referred to as **comments** in the Self-Service Portal.

In the Self-Service Portal, you can display the existing tickets, open a ticket in a detail view, add an attachment and create a comment. You can also perform the search in most of the customizable item lists.

4.4.4.1. Display the existing tickets

To display the existing tickets:

1. Go to the **Open tickets** Info tile.
2. Click **Open list**.

My open tickets

CA-0000079 Mein SAP-Zugang geht nicht mehr	Created (CA) Call 3 Medium	To solve till: 10/13/2023 09:44:23	Reported at: 10/12/2023 09:44:23
IN-0004342 Oracle not available	Waiting for Major Incident (IN) Incident 3 Medium	To solve till: 10/13/2023 09:17:09	Reported at: 10/12/2023 09:17:09
IN-0004256 VoIP telephone system malfunction	Waiting for Major Incident (IN) Incident 3 Medium	To solve till: 10/03/2023 13:06:28	Reported at: 10/02/2023 13:06:28
IN-0004157 VOIP not working	Waiting for Major Incident (IN) Incident 3 Medium	To solve till: 09/22/2023 13:57:04	Reported at: 09/21/2023 13:57:04
CA-0000012 Outlook doesn't receive emails anymore	Created (CA) Call 3 Medium	To solve till: 07/28/2023 11:56:53	Reported at: 07/27/2023 11:56:53
IN-0003976 Printer network disruption	Waiting for Major Incident (IN) Incident 3 Medium	To solve till: 07/26/2023 15:15:40	Reported at: 07/25/2023 15:15:40

<< < 1 of 10 > >>

Create ticket

My open tickets dialog opens.

3. Here you can check all the existing tickets and open a selected ticket [in a detail view \(page 46\)](#).

4.4.4.2. Open a ticket in a detail view

To open a ticket in a detail view:

1. [Display the existing tickets \(page 45\)](#) by opening the **My open tickets** dialog.
2. Select and click the ticket you need.

A drawer with all the **ticket details** opens on the right.

The screenshot shows a ticket details dialog box titled "IN-0001214 | This is a nice ticket". It contains the following information:

- Status:** Created (IN)
- Priority:** 3 Medium
- Impact for end user:** 3 Medium
- Type:** Request
- Reported by:** Alexander
- Reported for:** Alexander
- Date reported:** 11/17/2022 14:43:47
- To solve until:** 11/18/2022 14:43:47
- Description:** Here is a picture
- Ticket descriptions:** A list showing the ticket history with a dropdown menu. The current entry is "11/17/2022 14:43:48 Alexander Mr. (Active Internal) This is a nice ticket Here is a picture".
- Attachments:** A section with a "Add attachment *" label and a drag-and-drop area with the text "Drag and drop your files here or browse desktop".
- Buttons:** "Save", "Cancel", "Add comment", and "Show details".

3. Check the ticket details such as Status, Priority, Reported by, Date reported as well as the ticket descriptions provided by you or the Help Desk.
You can also [Add a comment \(page 48\)](#) and [Add an attachment \(page 46\)](#) from here.

4.4.4.3. Add an attachment

To add an attachment in the ticket details dialog box:

1. Open a ticket [in a detail view \(page 46\)](#).
2. Go to the *Attachments* field.
3. Click to **browse/select files** for an attachment or **drag & drop** it onto the field.

IN-0001504 | Second display is flickering

Status: Created (IN) | Priority: 3 Medium | Impact for end user: 3 Medium | Type: Request

Reported by: Alexander | Reported for: Alexander

Date reported: 12/07/2022 14:36:29 | To solve until: 12/08/2022 14:36:29

Description: My external display is flickering. I cannot work properly.

Ticket descriptions: 12/07/2022 14:36:29 | Alexander | Mr. (Active Internal) | Second display is flickering

Attachments: Add attachment * | Drop to start uploading | + Copy

Buttons: Save, Cancel, Add comment, Show details

4. Click **Save**.

The existing ticket has been updated with the attachment.

File limitations

Note that some limitations can be applied to the uploaded files. An administrator can set the max. allowed size and the file type limitations.

- **Max allowed file size**

It is the maximum file size (in MB) that the application accepts. If you try to upload a file larger than the limit allows, you get an error message.

- **File type limitation**

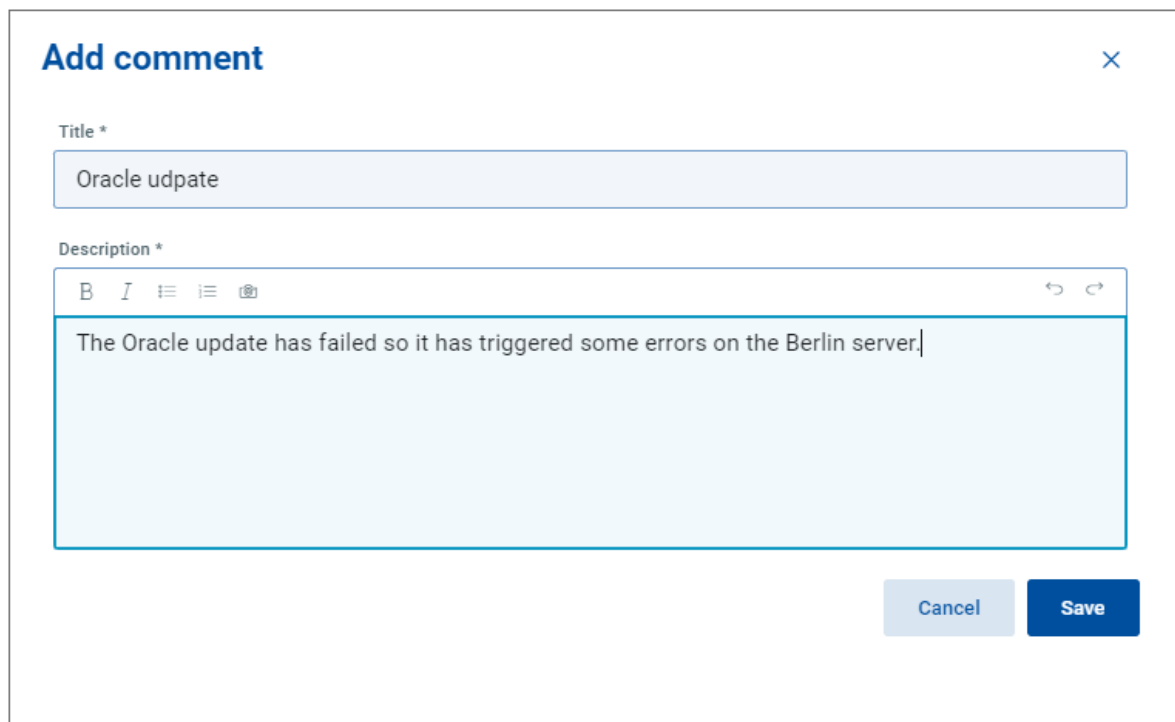
In this case, only the files with the allowed file extensions are accepted during the upload. If you try to upload a file of an unallowed type, you get an error message.

4.4.4.4. Create a comment

To create a new comment for a ticket:

1. Open a ticket [in a detail view \(page 46\)](#).
2. Click **Add comment**.

The **Add comment** dialog opens.



Add comment [X]

Title *

Oracle update

Description *

B I [List Icon] [Link Icon] [Image Icon] [Undo] [Redo]

The Oracle update has failed so it has triggered some errors on the Berlin server.

Cancel Save

3. Write your comment.
Note that you can also copy and paste a picture directly in the description field.
4. Click **Save**.
The existing ticket has been updated with a new ticket description.

4.4.4.5. Searching in the customizable item list

It is also possible to perform the search in most of the customizable item lists across the Portal.

My open tickets

Search by ticket number, title and description

CA-0000079 | Mein SAP-Zugang geht nicht mehr
Created (CA) Call 3 Medium To solve till: 10/13/2023 09:44:23 Reported at: 10/12/2023 09:44:23

IN-0004342 | Oracle not available
Waiting for Major incident (IN) Incident 3 Medium To solve till: 10/13/2023 09:17:09 Reported at: 10/12/2023 09:17:09

IN-0004256 | VoIP telephone system malfunction
Waiting for Major incident (IN) Incident 3 Medium To solve till: 10/03/2023 13:06:28 Reported at: 10/02/2023 13:06:28

The following item lists with the search functionality are available:

- My open tickets
- My resolved tickets
- My tickets all
- My requests

For details, see [Customizable item list \(page 37\)](#).

4.4.5. Confirming and rejecting a ticket solution

The number of resolved tickets (incidents and service requests) is displayed on the **Solutions to confirm** tile. Thus, when the service desk comes up with a ticket solution, you can check the tile to see the update immediately, open the ticket solution, confirm it or reject it.

To confirm a ticket solution:

1. Go to the **Solutions to confirm** tile.
2. Click **Open list**.
Solution to confirm dialog opens.
This dialog is split in two parts: **Tickets with solutions for confirmation** and **My resolved service requests for confirmation**. The former stands for the incidents and the latter for the service requests so that you can clearly filter out either the incidents or service requests for the confirmation.



You can quickly search in the ticket lists. See [Searching in the customizable item list \(page 27\)](#) and [Customizable item list \(page 37\)](#).

If a ticket is in the *User informed (IN)* status, you can confirm it.

3. Click the selected ticket.

The ticket opens in a detail view where you can see the proposed solutions.

The screenshot displays the 'Tickets with solutions for confirmation' and 'My resolved service requests for confirmation' sections. A red arrow points to the 'Confirm' button in the 'IN-0003970 | My monitor flickers' ticket detail view.

Tickets with solutions for confirmation

Search by ticket number, title and description

IN-0003970 | My monitor flickers
 User Informed (IN) 3 Medium
 To solve till: 07/20/2023 17:00:00 Reported at: 07/19/2023 17:39:06

IN-0000072 | Wi-Fi doesn't work on my laptop
 User Informed (IN) 3 Medium
 To solve till: 07/19/2021 09:26:31 Reported at: 07/16/2021 09:26:31

My resolved service requests for confirmation

Search by ticket number, title and description

SR-0000002 | My headset doesn't work
 User Informed (SR) 3 Medium
 To solve till: 07/20/2023 17:00:00 Reported at: 07/19/2023 17:16:15

IN-0003970 | My monitor flickers

Status: User Informed (IN) Priority: 3 Medium Impact for end user: 3 Medium Type: Disturbance

Reported by: Reported for:

Date reported: 07/19/2023 17:39:06 To solve until: 07/20/2023 17:00:00

Description: My monitor flickers. I can't work like that.

Ticket descriptions

- > added a description - 10/18/2023 16:02:49 Install ne...
- > added a description - 10/12/2023 09:46:54 Flackert i...
- > added a description - 07/19/2023 17:40:50 Unplug an...
- > added a description - 07/19/2023 17:39:06 My monit...

Attachments

1 of 1

Close Reject Confirm

4. Click **Confirm**.

The ticket closes immediately.

To reject a ticket solution:

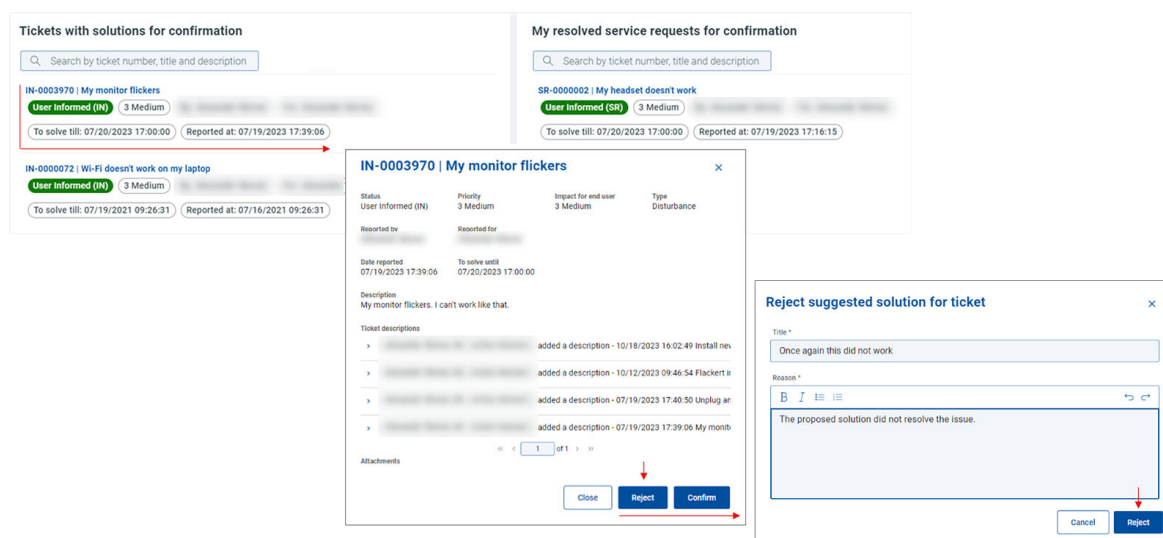
1. Go to the **Solutions to confirm** tile.
2. Click **Open list**.

Solution to confirm dialog opens.

This dialog is split in two parts: **Tickets with solutions for confirmation** and **My resolved service requests for confirmation**. The former stands for the incidents and the latter for the service requests so that you can clearly filter out either the incidents or service requests for the rejection.

If a ticket is in the `User informed (IN)` status, you can reject it.

3. Click the selected ticket.
 The ticket opens in a detail view where you can see the proposed solutions.



4. Click **Reject**.

The **Reject suggested solution for a ticket** dialog opens.

5. Fill in the reason for rejection.

6. Click **Reject**.

By rejecting the ticket solution:

- The ticket removed from the **My resolved tickets** dialog and gets back into the **My open tickets** list.
- The status changes to **User Not Accepted (IN)**.
- The service desk has to investigate it again.

4.4.6. Opening the service shop for creating a service request

You can open **USU Shop** from the Self-Service Portal from three places:

1. The **Open requests** Info tile
2. The **Overview of my requests** dialog
3. The **Request detail view**

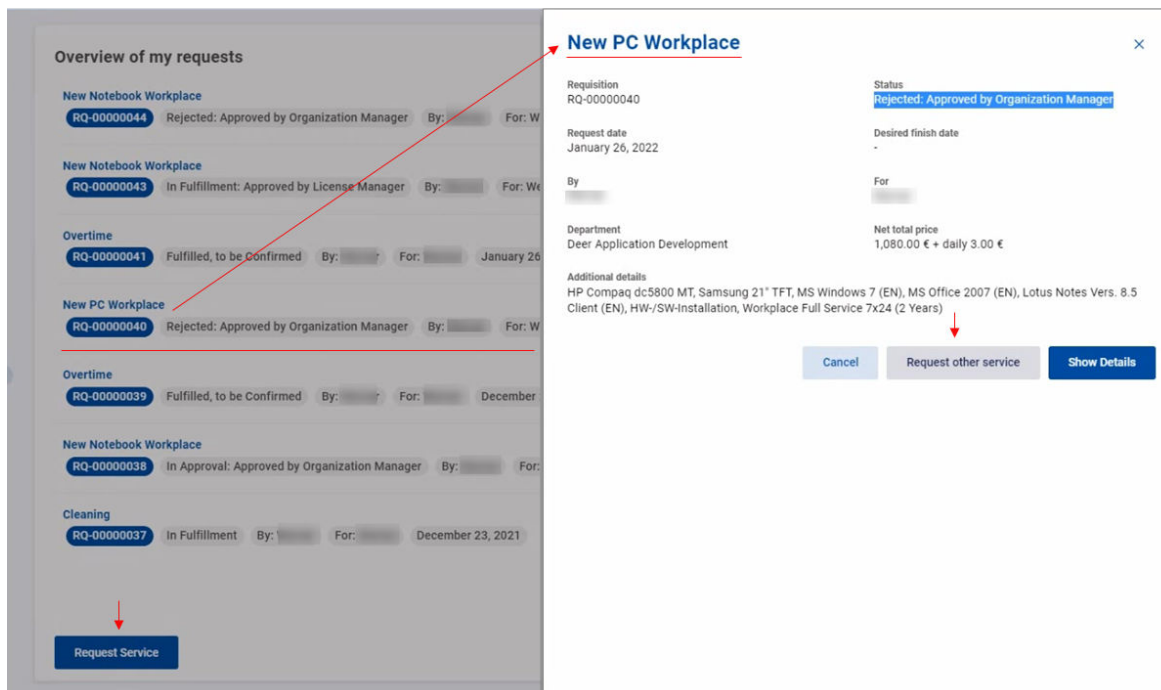
The following use case encompasses all of these options.

To open the service shop from the Self-Service Portal:

1. Go to the **Open requests** Info tile.
 - Here you can already click **Request service** to call the **USU Shop**.
2. Click **Open list**.
The **Overview of my requests** dialog opens.

- Here you can also click **Request service** to call the **USU Shop**.

3. Click the selected request.
The **Request detail view** opens.



Check the request details such as the status, request dates and other additional information.

- Click **Request other service** to call the **USU Shop**.
- Click **Show details** to call .

4.5. Chatbot dialogs

When you come to USU Self-Service Portal, basically you want to solve an issue. The **Chatbot** and **search** (page 27) are the two most commonly used entry points in this case.

With the **Chatbot** (page 25), you are able to conduct a guided conversation, to run self-help actions on the basis of the entered term or create a ticket directly from the Chatbot dialog.



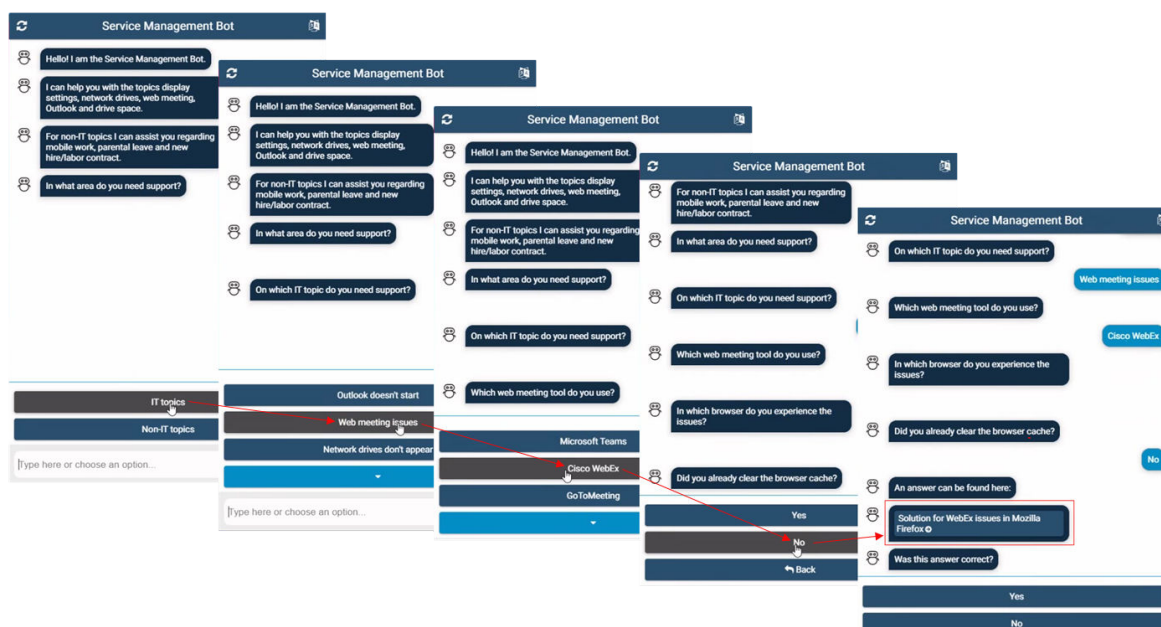
The main idea of the **Chatbot** implementation is to either resolve an issue directly on the end-user's computer or guide a user to the place where he can resolve the issue.

The Chatbot dialogs may lead to the solution document, self-help action and the ticket creation.

4.5.1. Dialogs leading to the solution document

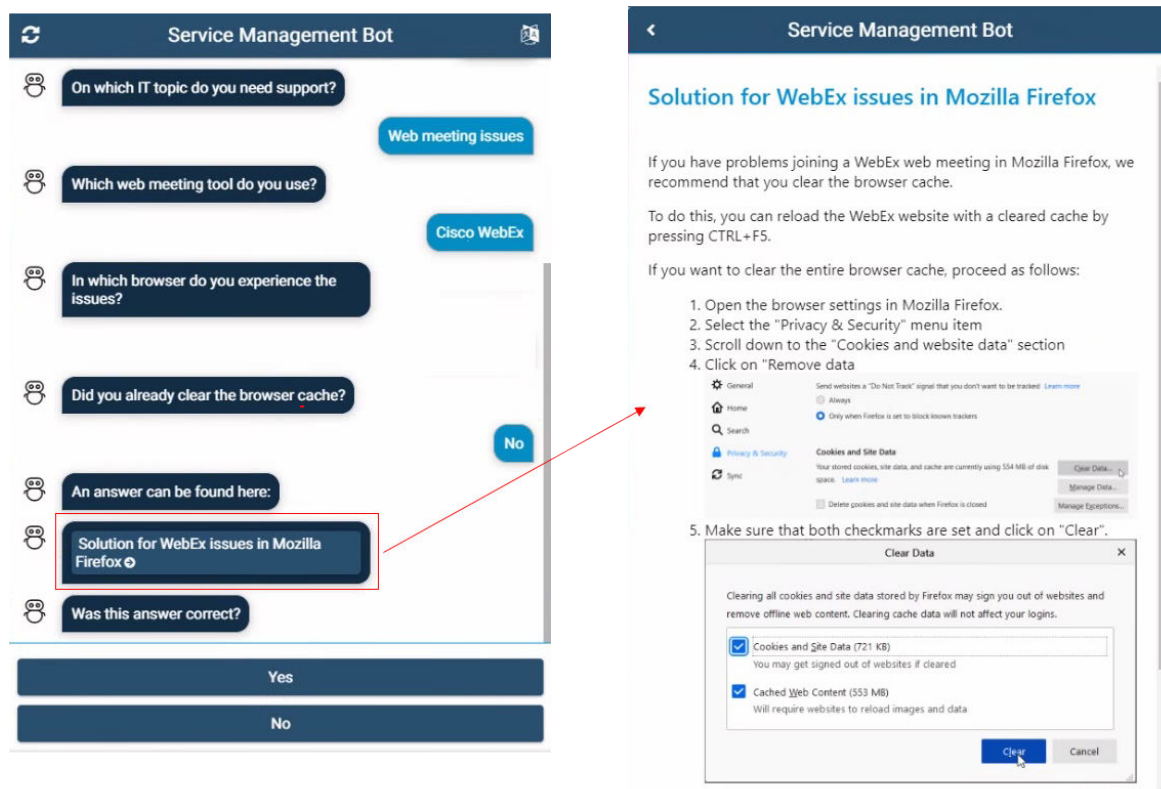
Example of using the Chatbot in a guided dialog mode to get a solution document:

1. Click the **Chatbot icon** to start the Chatbot.
2. Click through the **predefined categories** at the bottom of the Chatbot window to follow your issue.



It depends on the customer Chatbot configuration if and which predefined categories are available in the Chatbot dialog.

3. Chatbot may offer you the corresponding **solution document** at some point.

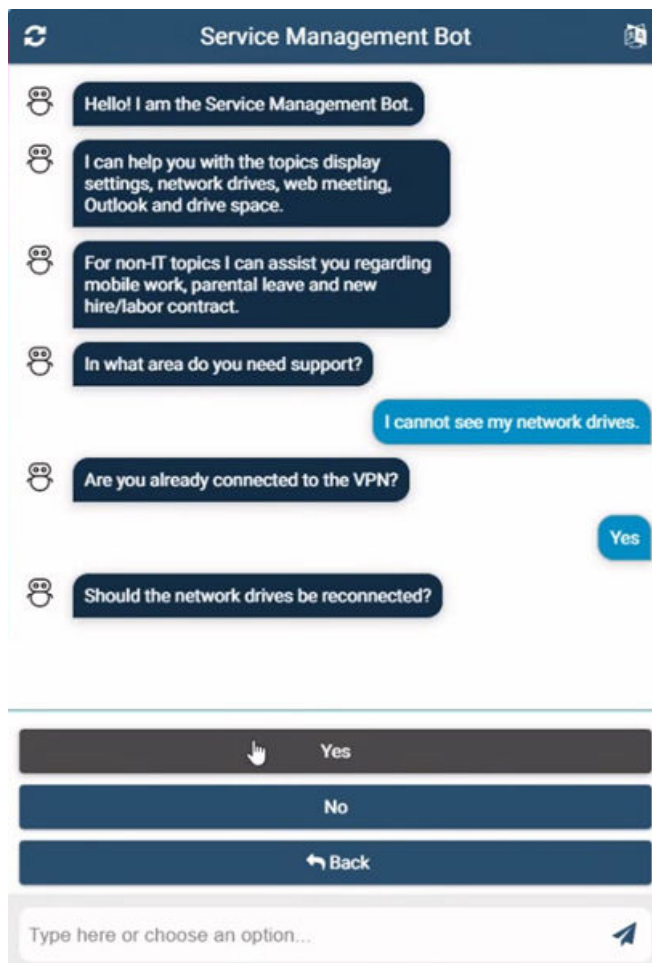


The solution document opens directly in the Chatbot window.

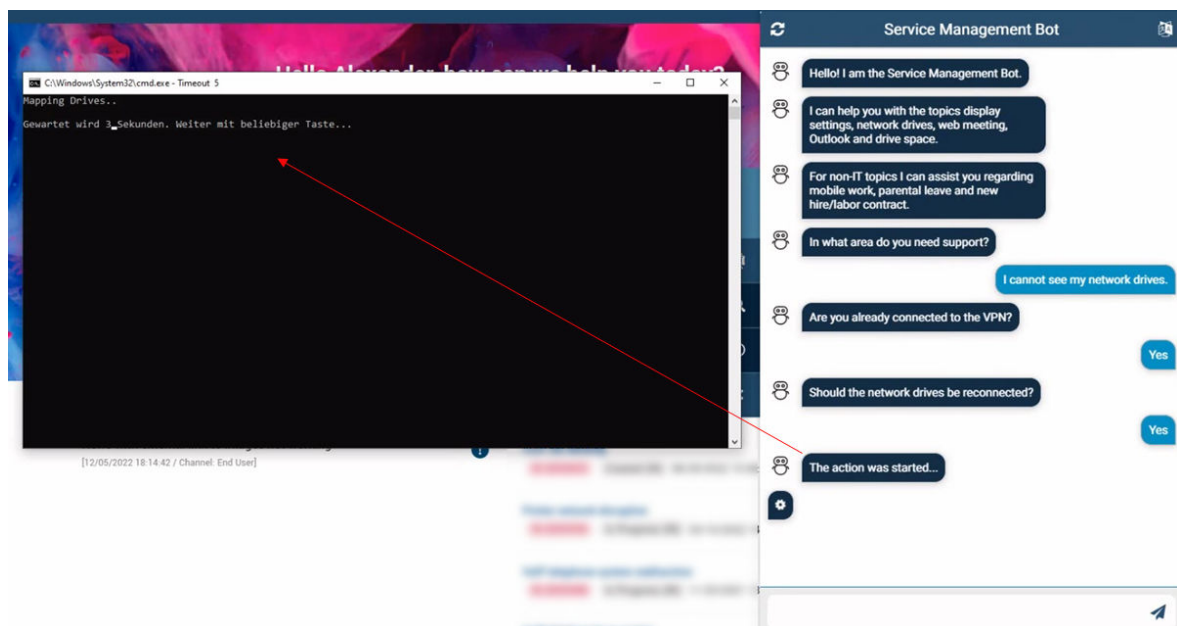
4.5.2. Dialogs leading to the self-help action

Example of using the Chatbot with a keyword to start a self-help action:

1. Click the **Chatbot icon** to start the Chatbot.
2. Type in a keyword or a sentence describing your problem.
3. Click **Enter**.
The Chatbot analyzes and maps the keywords and starts the correct dialog automatically.
4. The conversation goes on and the Chatbot offers you to execute a **specific action** at some point.



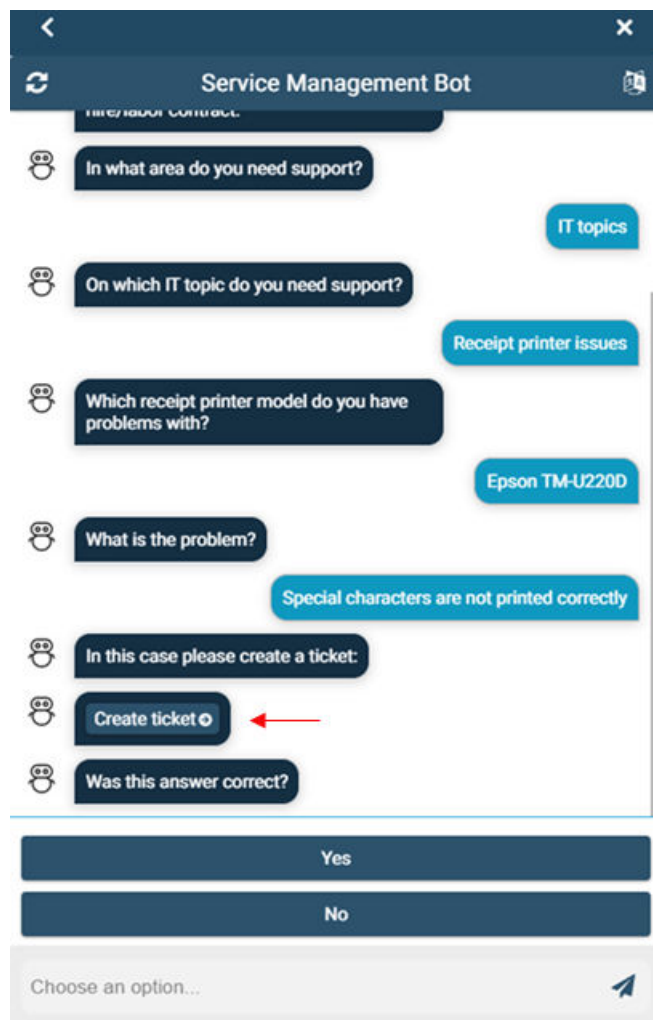
5. Click **Yes**.



The Chatbot launches the appropriate browser extension and **starts the right system service automatically**.

4.5.3. Dialogs ending with no solution / ticket creation

The Chatbot may provide you assistance with a **ticket creation** if it cannot find another solution. If this is configured in your Chatbot, it may look similar to the following example:



4.6. Manager Self-service

The role of the **Manager user** is slightly different from the end-user: See [Target Groups \(page 12\)](#). In addition to managing tickets and requests, your company may provide you with a manager-specific view with employee details, tasks and systems of your organization unit for instance.

In most cases, the managers deal with service request approval tasks and displaying the content of an organization unit.

4.6.1. Approving and declining service request approval tasks

To approve the service request approval tasks:

1. Go to the **Open tasks** Info tile.
2. Click **Open list**.
The **Overview of my tasks** dialog opens.
Here you can see the requests created by your employees. Now it is up to you to approve or decline something because of the role you have.
3. Click the selected request to open it in the detail view.
Here you can check what was requested, when, by whom plus some additional info.

The screenshot shows a two-pane interface. The left pane, titled 'Overview of my tasks', contains a list of three tasks. The first task, 'RQ-00000038 approve by Budget Manager', is highlighted with a red line and a red arrow pointing to the right pane. The right pane shows the details for this task, titled 'RQ-00000038 approve by Budget Manager | New Notebook Workplace'. The details include:

- Task description:** Approve requisition as Budget Manager.
- State:** Offered
- Planned Start:** 10/24/2022 09:43:22
- Planned End:** 10/25/2022 09:43:22
- Support Group:** VM ADMIN
- Process Description:** Request RQ-00000038
- Substituted Actors:** -
- Total price:** 1,330.00 EUR
- Daily price:** 4.00 EUR
- Additional info:** HP EliteBook 8440p, Samsung 21" TFT, MS Windows 7 (EN), MS Office 2007 (EN), Lotus Notes Vers. 8.5 Client (EN), HW-/SW-Installation, Workplace Full Service 7x24 (2 Years)

At the bottom right of the right pane, there are three buttons: 'Cancel', 'Decline', and 'Approve'. A red arrow points to the 'Approve' button.

4. Click **Approve**.
Now the service request process may proceed.

To decline the service request approval tasks:

1. Go to the **Open tasks** Info tile.
2. Click **Open list**.
The **Overview of my tasks** dialog opens.

Here you can see the requests created by your employees. Now it is up to you to approve or decline something because of the role you have.

- Click the selected request to open it in the detail view.

Here you can check what was requested, when, by whom plus some additional info.

The screenshot shows a web portal interface. On the left, under 'Overview of my tasks', there is a list of three requests. The first request, 'RQ-00000038 approve by Budget Manager', is highlighted with a red arrow pointing to its title in the main detail view on the right. The detail view for 'RQ-00000038 approve by Budget Manager | New Notebook Workplace' includes the following information:

- Task description:** Approve requisition as Budget Manager.
- State:** Offered
- Planned Start:** 10/24/2022 09:43:22
- Planned End:** 10/25/2022 09:43:22
- Support Group:** VM ADMIN
- Process Description:** Request RQ-00000038
- Substituted Actors:** -
- Total price:** 1,330.00 EUR
- Daily price:** 4.00 EUR
- Additional info:** HP EliteBook 8440p, Samsung 21" TFT, MS Windows 7 (EN), MS Office 2007 (EN), Lotus Notes Vers. 8.5 Client (EN), HW-/SW-Installation, Workplace Full Service 7x24 (2 Years)

At the bottom right of the detail view, there are three buttons: 'Cancel', 'Decline' (highlighted with a red arrow), and 'Approve'.

- Click **Decline**.

The **Decline task** dialog opens.

Type in the reason for rejection.

The 'Decline task' dialog box is shown. It has a title bar with 'Decline task' and a close button. Below the title bar, there is a label 'Reason *' and a text input area. The input area contains the text 'Not planned at this point.' and has a rich text editor toolbar above it. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Decline' (highlighted with a red arrow).

- Click **Decline** again.

Now the process goes the other way back to the previous point.

4.6.2. Displaying the organization unit content

The content on a manager-specific Portal page could be structured according to the following example:

Manager Self-Service

My Employees

Details	Title	First name	Last name	Person No.	Email	Phone (Office)	Mobile Phone (Of
	Mr.	Jeffrey					
	Mrs.	Elisabeth					-
	Mr.	Alexander					-

My Tasks

RQ-00000038 approve by Budget Manager

New Notebook Workplace Offered 10/24/2022 09:43:22

RQ-00000034 approve by Budget Manager

New Notebook Workplace Offered 01/26/2022 12:16:52

RQ-00000030 approve by Licence Manager

New Notebook Workplace Offered 01/26/2022 12:16:14

Systems of my Organization Unit

NotebookWorkstation0756

S-00000756 Windows Notebook Workstation Active

copy

demoSY3013 Windows Desktop Workstation Active

PC_500002

demoSY3005 Windows Desktop Workstation Active

Note that this is a manager-specific view, more such views can be created by the **Self-Service Portal administrator**. For example, the Manager Self-Service dialog may contain employee details, tasks or systems of your organization unit, the details about the system and more.