

Self Service User Guide

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Logging in

Log in by opening your browser of choice; we recommend **Mozilla Firefox**, **Microsoft Internet Explorer**, **Safari** or **Google Chrome**. A different browser will display a warning message that includes links to these browsers, so that you can use them to log in.

Enter your Sunrise URL: <http://moraysrv121:8080/SunriseLive/web/SContacts/>

If you can't remember the URL, check your inbox for the email that contained your invitation.



The first time you log in, you will have to change the password.

Changing the password

Change your Password ✕

Please enter your existing Password, then enter a new Password and confirm that the new Passwords match

Old Password

New Password
 Strong

Confirm new Password

Change Password

Once you have updated your details, click **Change Password** to save the changes.

If you can't remember your login details either contact your **Service Desk** for help or click the **Forgotten Your Login Details?** Button

Having trouble logging in?

Check whether you're entering the correct account name

If you're still having trouble logging in, enter your account name below to reset your password

Account Name / Email Address

Continue



Enter your email address in the box and press continue. A message stating 'An email has been sent to your registered email address. Please use the link sent in it to reset your password' will appear.

Check your email inbox for the email to reset your password. Follow the instructions on the email. If you don't receive an email, contact the **ICT service desk**.

Once you have logged in to your '**My Profile Dashboard**' as below:

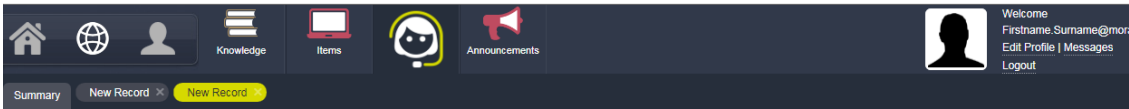
The screenshot shows a dark blue header bar with navigation icons (Home, Global, Profile) on the left and a user profile section on the right containing a 'Welcome' message, email address, and links for 'Edit Profile', 'Messages', and 'Logout'. Below the header is a 'Home Dashboard' section with a 'Welcome!' message and a 'Log a New Helpdesk Call' button. The main content area is divided into two columns: 'Currently Active Calls' (showing a table with 'Incident ID' and 'Incident Summary' headers and a 'No Items' message) and 'Announcements' (with a message to keep up-to-date with the latest announcements).

Service Navigation Bar

Service Header Bar

Content area

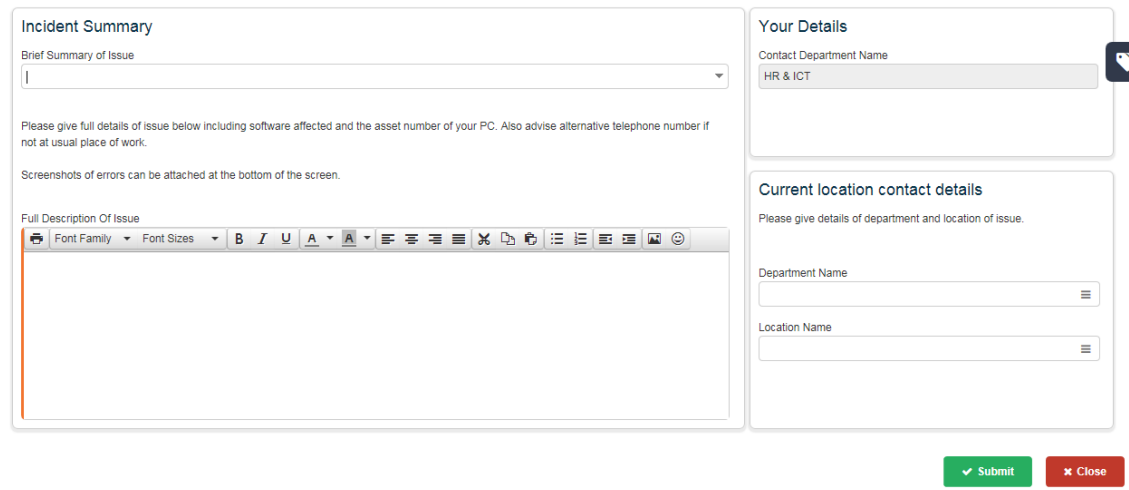
The Screen Areas (adding an incident – see [How to add an incident](#) for more information)



Service Navigation Bar



Service Header Bar



Content area



Tabs

From top to bottom, the screen comprises the following areas:

- Service Area** The top of the screen is divided into:
- Static Service Area** This is where you choose the function group you want to use. The function groups are Home, My Services, My Account. Only one function group is displayed at any time.
- Dynamic Service Area** This area shows the different options which relate to each static service area option.
 These are explained further in the Functions section below.
- Account Area** This is where you view and update your Profile details and receive notifications and messages. Click an icon to select a Service
- Service Area** The rest of the screen is divided into:
- Service Navigation Bar** This area is displayed when viewing Services. It defaults to a Summary table, containing filters of data for that Service. If Tasks are available for the Service, a Task tab will also be displayed.

 When accessing records within Services and Tasks, the record number will be displayed in this area for quick reference later on, allowing you to have multiple records open at the same time.

 Hovering the mouse over a Service icon will display its Service Navigation Bar and any records that are currently in progress for that service.

Service Header Bar The Service Header Bar shows you which Service you are in and the current operation. When an operation is submitted, such as **Add Note**, a message is displayed here to tell you the result of the operation.




Action Bar Displays all the operations you can perform on the currently selected record. The current state of the selected record determines which operations are available to you. Your security permissions also determine which operations appear here.

Content Area This is where you can interact with your records. Viewing, searching, sorting, adding and updating are all facilitated in this area.

Tabs This is where you view the Service Request's history and perform the operations that add extra value to your data, such as managing attachments, creating secondary associations and adding information about resource usage.

The Function Groups



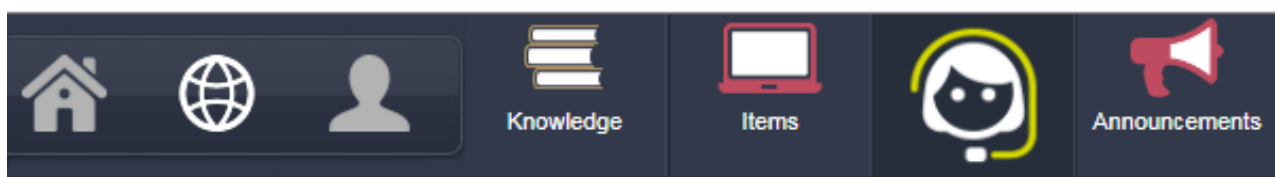
Function Group	What it's for
 Home	This is the default landing page when logging into Sunrise. It displays charts and dashboard features, helping you to manage your workload.
 My Services	This is where you display the Services to which you have access. See My Services.
 My Account	Select My Account to access My Profile : For your personal details and your Profile Picture.

Using the Service Navigation Bar

The **Dynamic Service Area** is the area where you access all the **Services** available to you.

Announcements

You can view the latest up-to-date announcements from the **Service Desk** via the **Service Navigation bar**



OR

Via your Home Dashboard

Welcome!
Welcome to your Service Desk portal.
Here you can find the latest updates from the Service Desk, raise a new ticket or check on any of your currently outstanding issues.
For further updates, or to talk to a person directly, please call 01343 563333.

Log a New Helpdesk Call

ICT Servicedesk eForms
Please raise a call using the link above. Completed authorisation form is to be emailed to ICT.Servicedesk by Line Manager quoting the call reference in the subject after the call has been raised.
[Click here for ICT Servicedesk eForms](#)

Currently Active Calls
We're currently working on the following Incidents and Service Requests that you have previously raised with us.

Incident ID	Incident Summary
No Items	

Announcements
Keep up-to-date with the latest announcements from the Service Desk.

Click on the relevant announcement to get more detail.

Announcements Summary

Summary View All Self-Service Announcements

Announcement ID	Type	Announcement Summary	Expiry Date
ANN000026	Test announcement		28/09/2018 00:00

Displaying 1 to 1 of 1 Items

Incident Management



Incident Management

This is where you log, resolve, and close Incidents and Service Requests and associate them with other Sunrise ITSM Services. You can also initiate other Incidents, Service Requests, Problems and Change Requests here.

Summary

Incident Management Summary

Add

Summary View Calls closed in last month

<input type="checkbox"/>	Closed Date	Incident ID	Priority	Escalation Level	Type	Category	Forename	Surname	Contact Department Name	Incident
No Items										

Please also see:

- [How to add an incident](#)
- [How to edit an incident](#)
- [How to track the progress of an incident](#)

Knowledge



Knowledge

Pool knowledge with your colleagues - and see if anyone's solved a similar problem in the past. See the Knowledge User Guide.

Summary

Knowledge Summary

Summary View Self-Service Knowledge Filter

<input type="checkbox"/>	Knowledge ID	Att	Knowledge Type	Knowledge Sub Type	Summary of Problem	Publish Date
<input type="checkbox"/>	KNB000001		Software	Microsoft Word 2000	Unable to get capital letters.	21/06/2018
<input type="checkbox"/>	KNR000002		Information	General Query	Unable to make a VPN connection from home	06/12/2017

Messages

Any updates to your reported **incidents**, there will be a notification in the **Messages** link in the top hand right of your screen in the **Service Bar**.

Update Personal Details

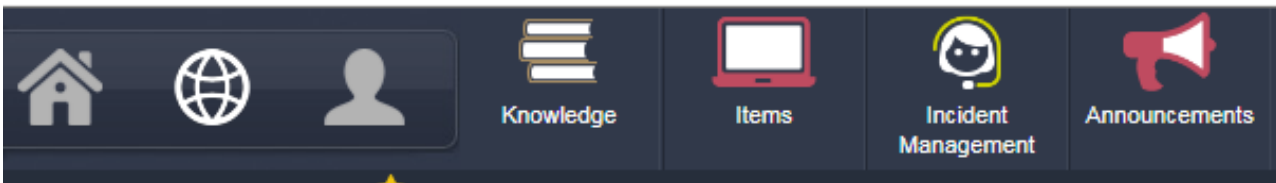
Click on **'Edit profile'** or on the **'My account'** icon in the **service navigation** bar.

Welcome
 Firstname.Surname@mora...
 Edit Profile | Messages
 Logout

When you first log in after receiving your activation email, you must check your account details. Enter in relevant details as required and press the save button. Usually it will ask for your **First Name, telephone number and mobile number details** to be updated in the first instance.

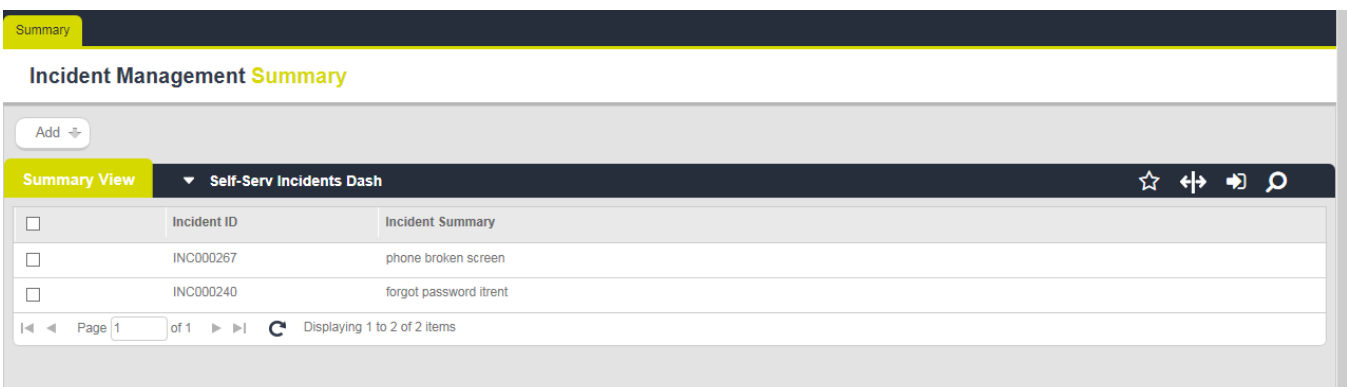
The **Display name** has to be unique and an error message will be displayed if the username is already taken. We suggest you use your **email address (Firstname.Surname@moray.gov.uk)**.

Which service am I in?



The **Service Header Bar** always shows the name of the current Service. In addition, each **Service** has a colour theme, so that the colour in the **Service** icon also appears in the current tab or record button in the **Service Header Bar** and the **Action Bar**. Notice how the colour theme changes as you hover from one **Service** to another.

The Summary Screen








Every **Service** has a **Summary screen** in which you display filtered lists of records. You can click the **Summary** tab of your current **Service** at any time. The **Summary screen** filters speed up searches for records; for example, you can select all records, your own records or records in specific states.

When the **Service** is configured to use **Tasks**, it also has a **Task Summary** tab.

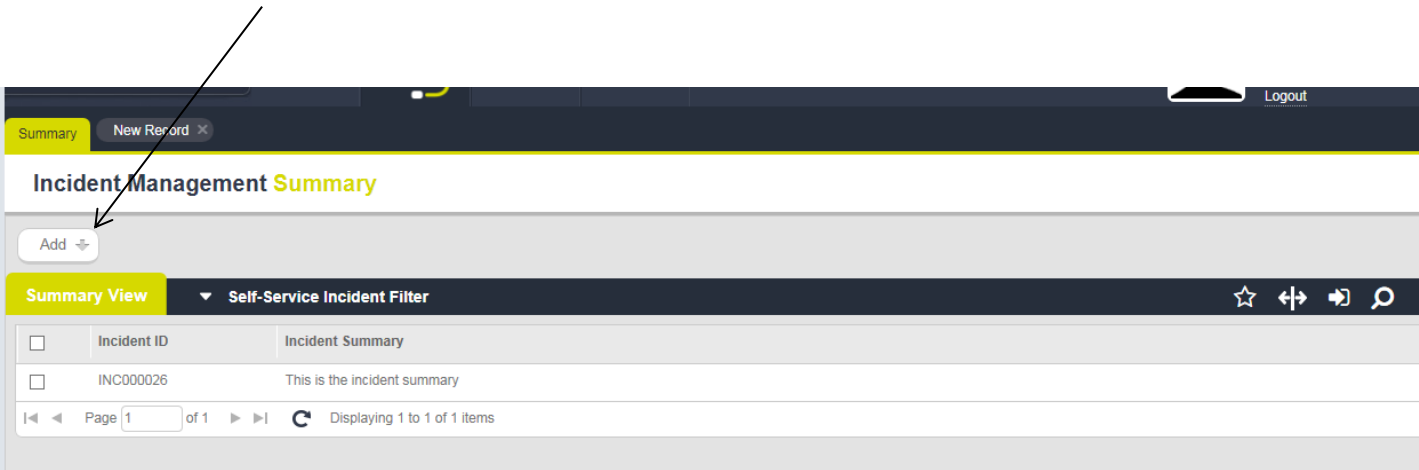
There are two layouts for **Summary screens**, **Classic** and **Template Filter**. In the **Summary screens filter** list, the icon beside each filter name shows whether it is a **Classic** or **Template Filter** layout. Only the **Template Filter Summary** displays the tags in each record.

The **Summary filters** provide these options:

	In Template Filter Summary the Save and Edit Filter icon is always visible. In Classic Summary it is visible only when you have performed a search using Toggle Search (below). Click this icon to begin saving the search criteria as a personal filter.
	If you use one particular filter most of the time, set it as Favourite by pressing the star outline beside the filter selector. The star turns white, showing that this is the Favourite filter. The next time you log in and select this screen, the new Favourite filter will be displayed.
	You can change the widths of columns to get the best view of the data you need. Make this change permanent by clicking the Save column widths icon beside the filter selector. The icon flashes while it saves the widths.
	Click the Export to CSV (Comma-Separated Values) icon to save all the grid information and export it to an Excel file. Note: If you have already sorted the filter on a field, the sorted results will be exported when you press the button.
	Toggle Search. Use this to display the Search Bar. To search for a field with specific text, click the on the right of the Service Header Bar to display the Search bar.

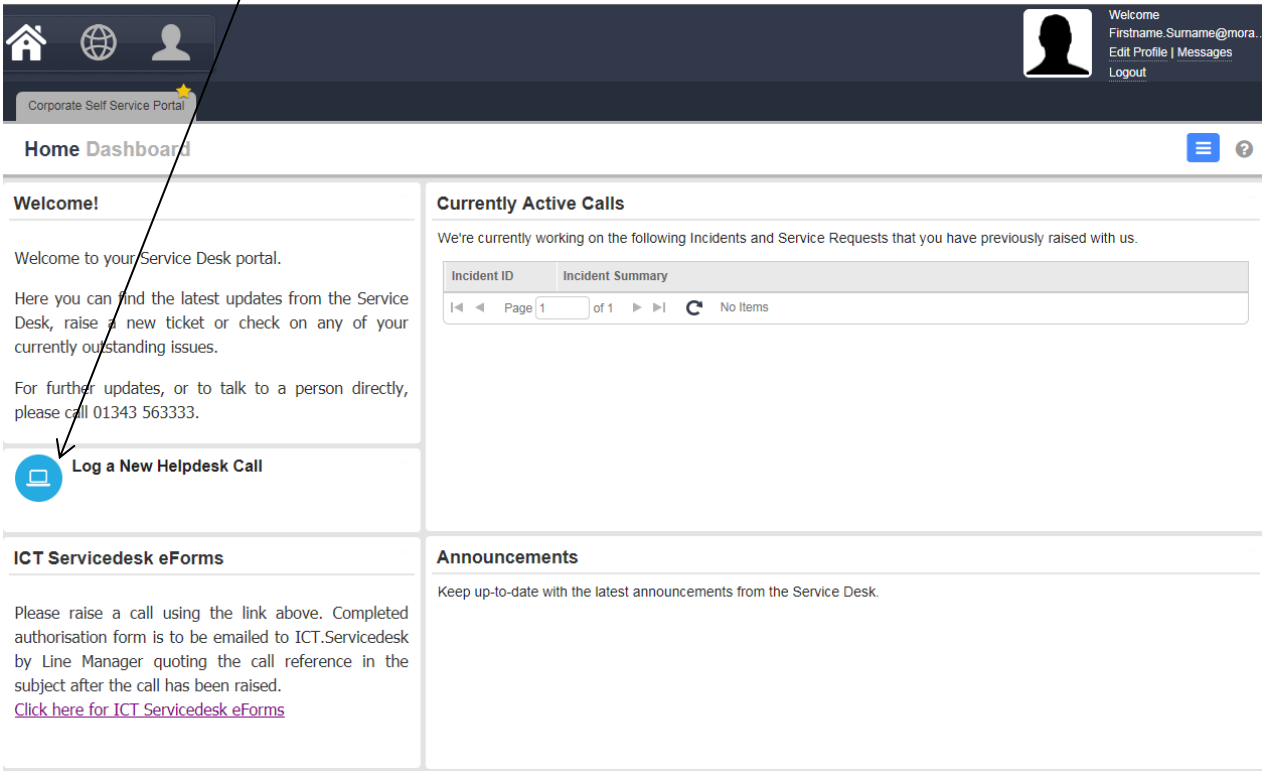
Adding a new incident

You can add a **new incident** via the [Incident Management Navigation Bar](#), click 'Add'.



OR

Via your **Home Dashboard** icon



To enter in the details of the incident, type in a brief summary in the **'Brief Summary of Issue'** and a full description of the issue (including any asset numbers or software titles). You may add any files in the attachments by clicking select in the bottom tab. Once you have confirmed all information is correct, enter in your contact details/location and press submit.

An Incident management **'New record'** will open.

Incident Management **New Record** Adding a Record

Add ↗

Incident Summary

Brief Summary of Issue

Please give full details of issue below including software affected and the asset number of your PC. Also advise alternative telephone number if not at usual place of work.

Screenshots of errors can be attached at the bottom of the screen.

Full Description Of Issue

Font Family Font Sizes **B** *I* U A A [List Icons]

Your Details

Contact Department Name

Current location contact details

Please give details of department and location of issue.

Department Name

Location Name

✔ Submit
✘ Close

Attachments

Add an attachment, windows explorer will open, navigate to the file and press open to attach file to incident

Your Details

Contact Department Name

Current location contact details

Please give details of department and location of issue.

Department Name

Type in the first few letters of the department / location and there will be some preset options displayed

Department ID	Attachments	Department Name	Department Type	Cost Centre	Site	Country	Switch
DEP000009	False	Corporate	[None]			[None]	
DEP000010	False	Corporate Services	[None]			[None]	

✔ Submit
✘ Close

Editing an incident

From the **Incident Summary** screen click on the relevant record and click **'Edit Record'**

When you select a record from a **Summary** screen it opens in **View Record** mode; that is:

- **You cannot edit the fields in the record**, they are all greyed out.
- You can use all the operations shown in the Action Bar.
- All the tabs at the bottom of the record are available for use (ie you can only add an attachment).

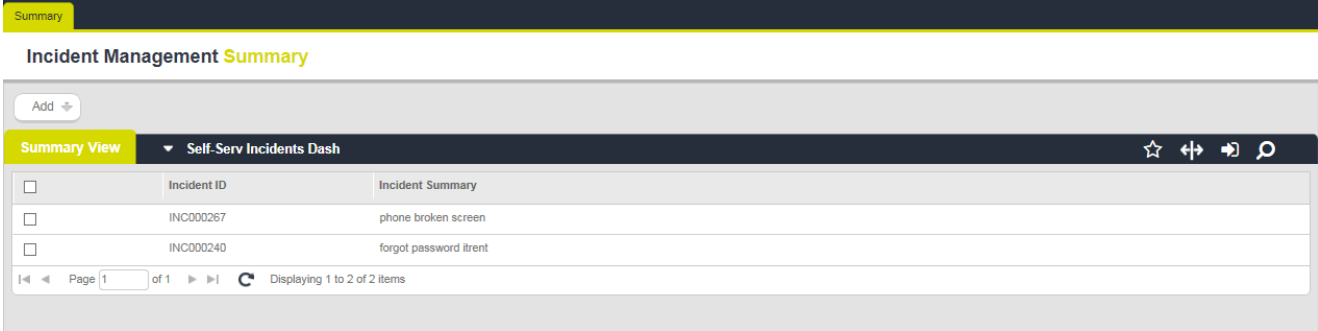
Tracking Incidents

All non-resolved incidents which you reported will be shown in the **'Currently Active Incidents'** on your **Home Dashboard**.

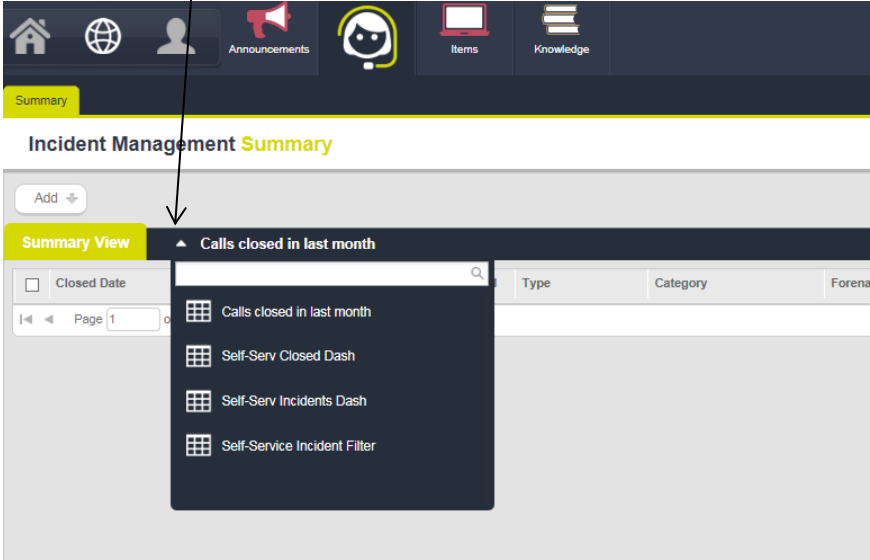
If you click on the **incident**, the details will open and you can track the progress of the **incident**.

OR

You can click on the face and the **incident management summary** screen will appear, you can also track the progress of your reported incident.



You can **change the view**, to see other filters (open and closed calls). Click on the downwards arrow

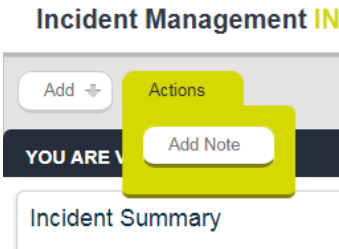


View the history of the actions to see historic actions/date/time/details etc.

From the **Home dashboard** you can track all the ‘closed calls in the last month’.

Notes

You can **add notes** relating to the **incident**, once submitted, the detail will be shown in the history. This icon can be found under the **Actions** (only when a record is created). Select an option from the drop down list (using the small arrow) and enter in note details and press submit.



Add Note

Enter all relevant details of the note

Note Type

[None]

[None]

Customer Communication

Status Update

Feedback

Update

Note

Costings

Additional Note

Submit Close

Refreshing the Base screen

You can refresh the **Base screen** by pressing **Ctrl F5**, in any of the **Services**.

Confirm Form Resubmission

The page that you're looking for used information that you entered. Returning to that page might cause any action that you took to be repeated. Do you want to continue?

Continue Cancel

Any queries?

Any queries please contact **01343 563333** or email [Query on Self Service Portal](#)