Self Service User Guide

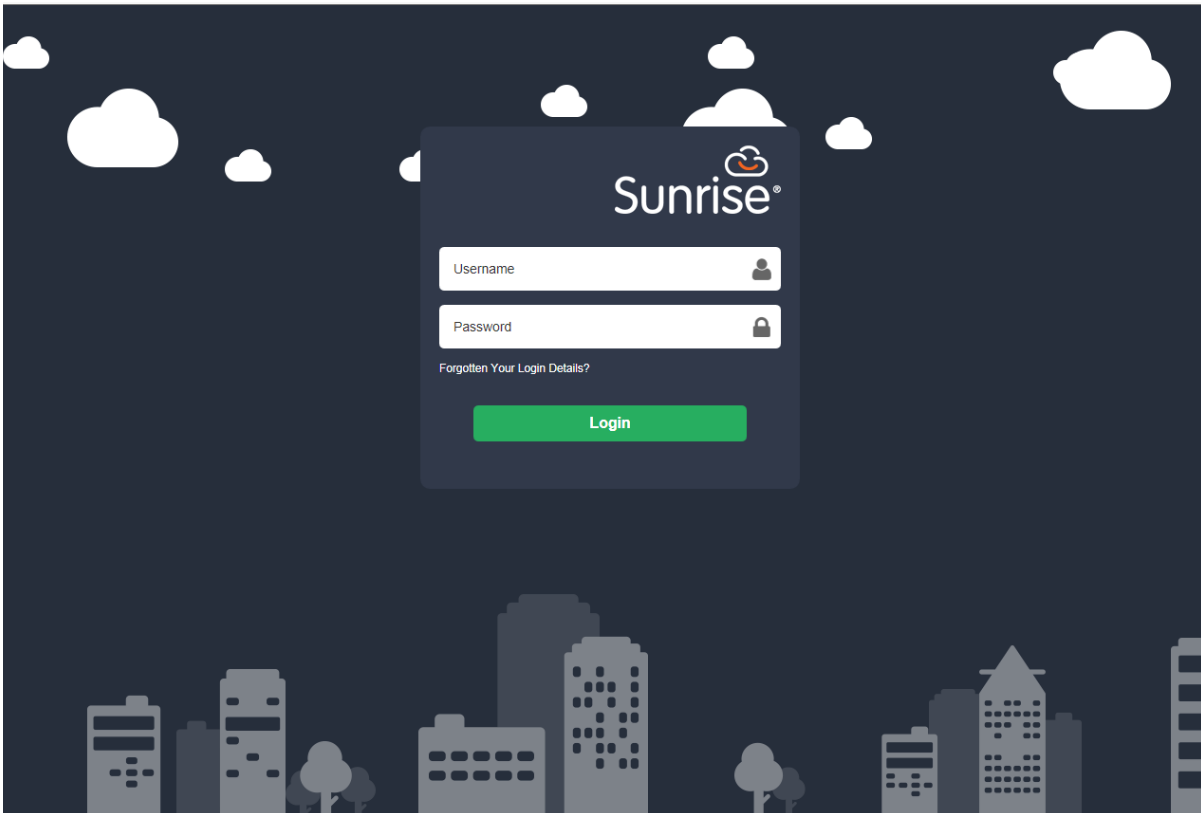
Contents

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.

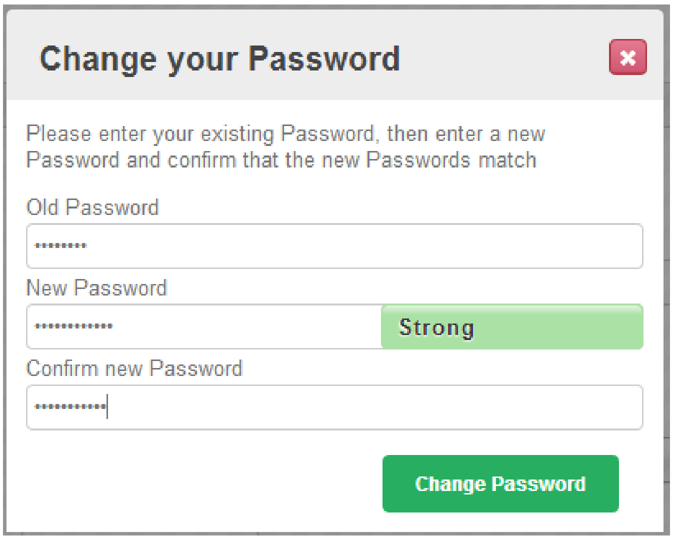
Enter your Sunrise URL: **http://moraysrv121:8080/SunriseLive/web/SContacts/**

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



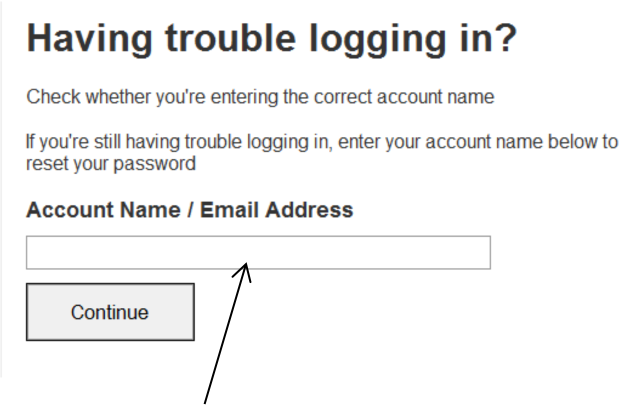
The first time you log in, you will have to change the password.

Changing the password



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

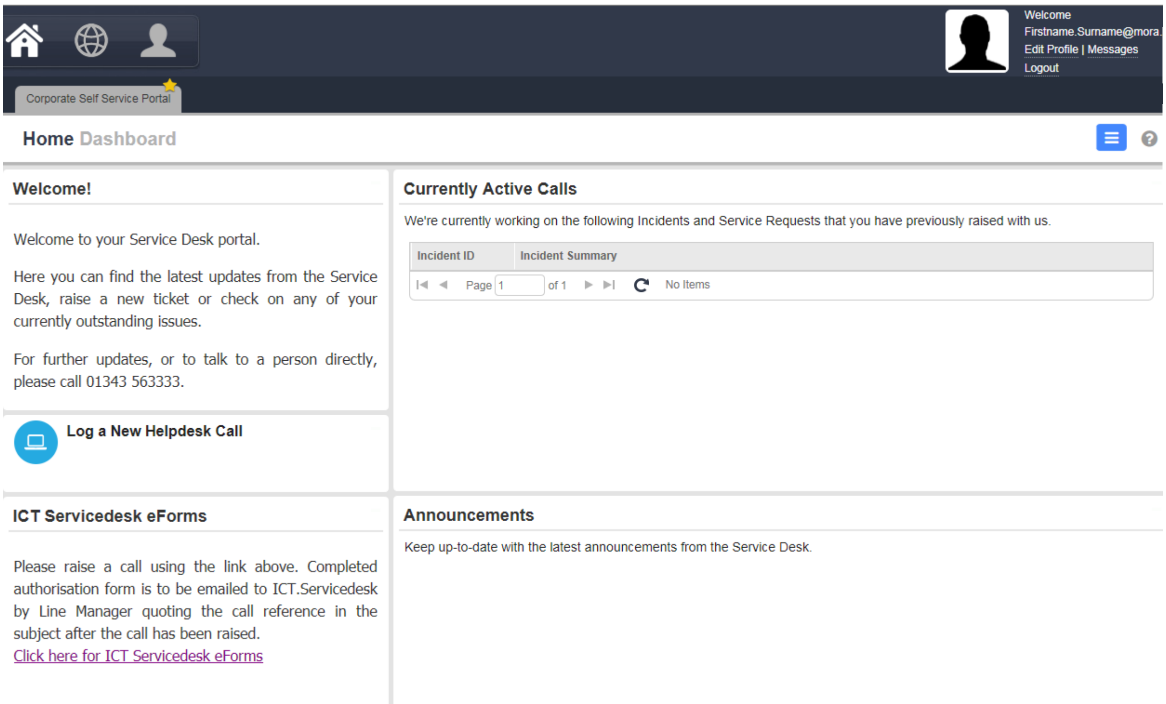
If you can't remember your login details either contact your **Service Desk** for help or click the **Forgotten Your Login Details?** Button



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:

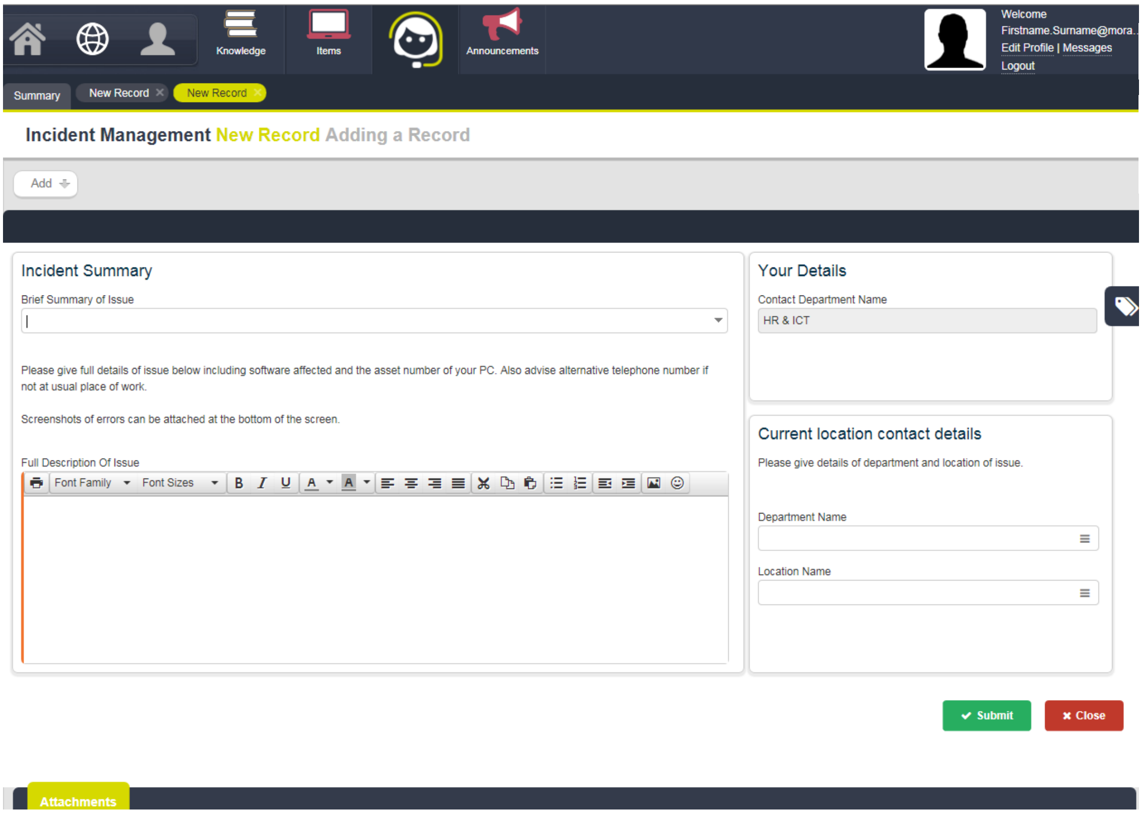


Service Navigation Bar

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

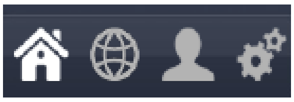
Tabs

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

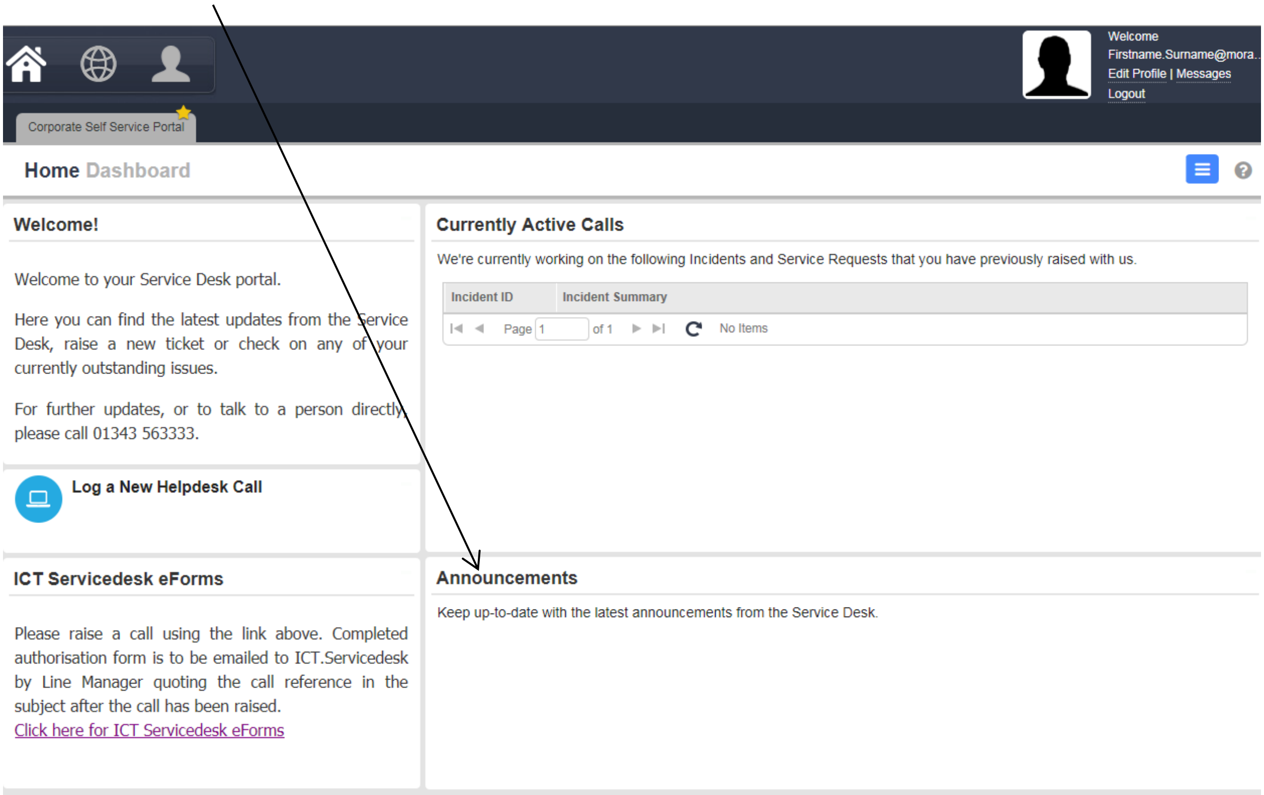
The **Dynamic Service Area** is the area where you access all the **Services** available to you.

Announcements

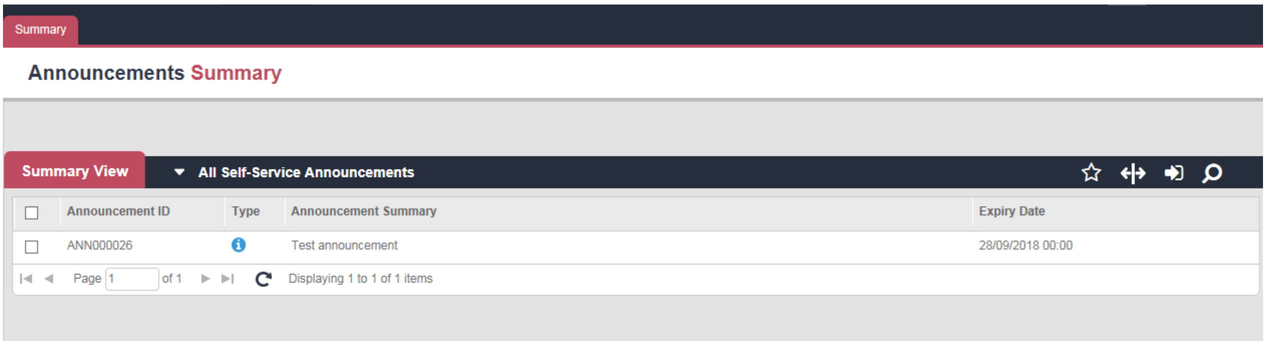
You can view the latest up-to-date announcements from the **Service Desk** via the **Service Navigation bar**

<u>OR</u>

Via your **Home Dashboard**



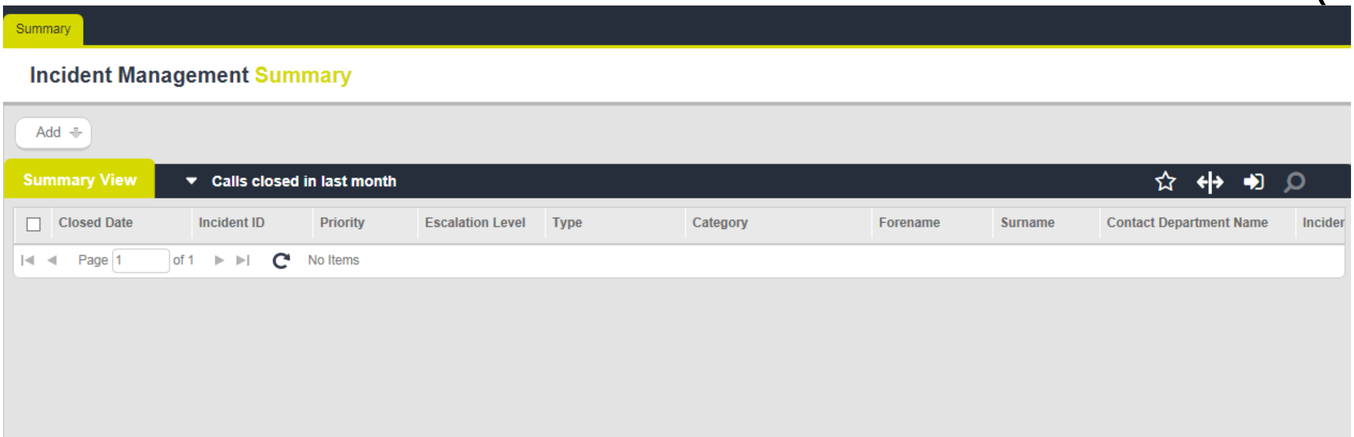
Click on the relevant announcement to get more detail.



Incident Management

Incident Management

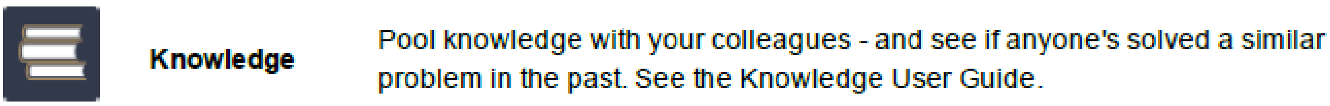
This is where you log, resolve, and close Incidents and Service Requests and associate them with other Sunrise ITSM Services. You can also initiate other Incidents, Service Requests, Problems and Change Requests here.

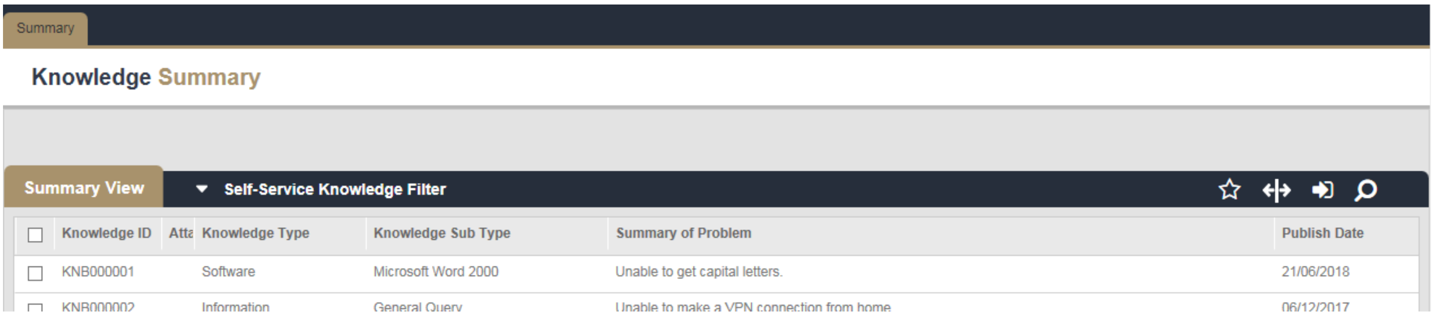


Please also see:

- How to add an incident
- How to edit an incident
- How to track the progress of an incident

Knowledge



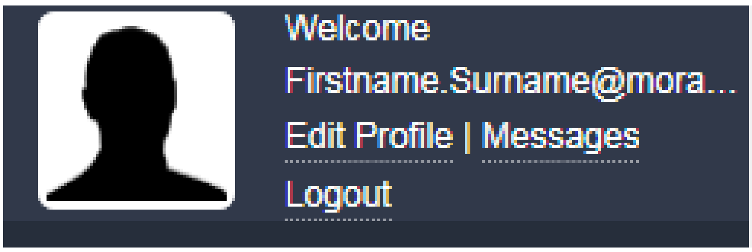


Messages

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

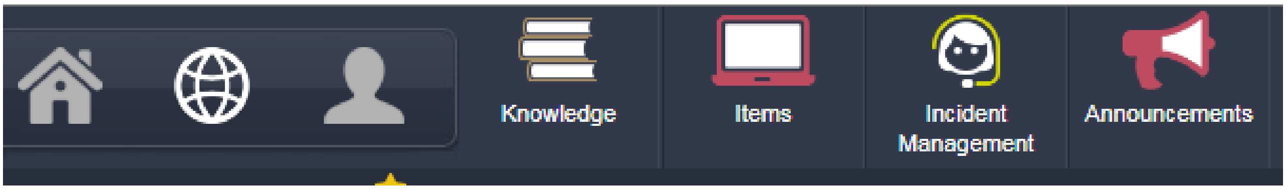
Click on **'Edit profile'** or on the **'My account'** icon in the **service navigation** bar.



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.

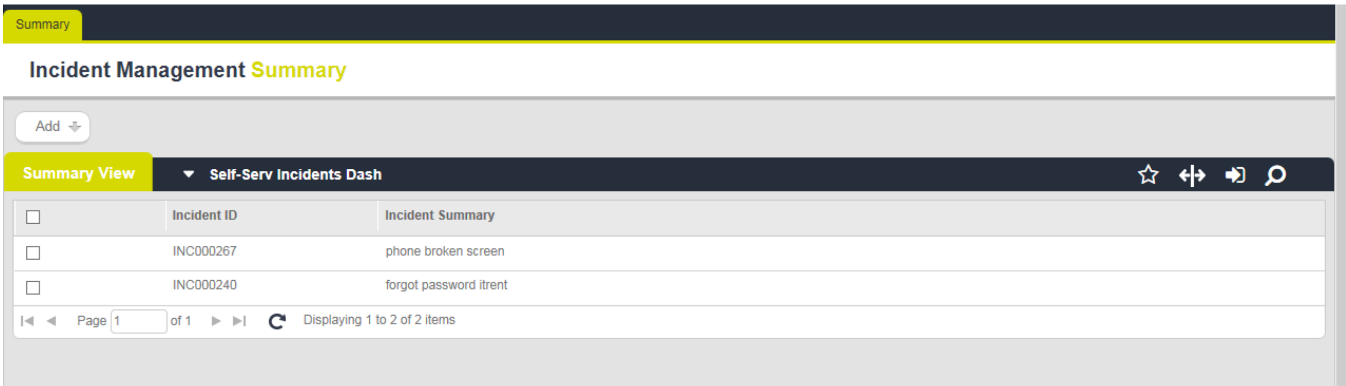
The **Display name** has to be unique and an error message will be displayed if the username is already taken. We suggest you use your **email address (Firstname.Surname@moray.gov.uk)**.

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.

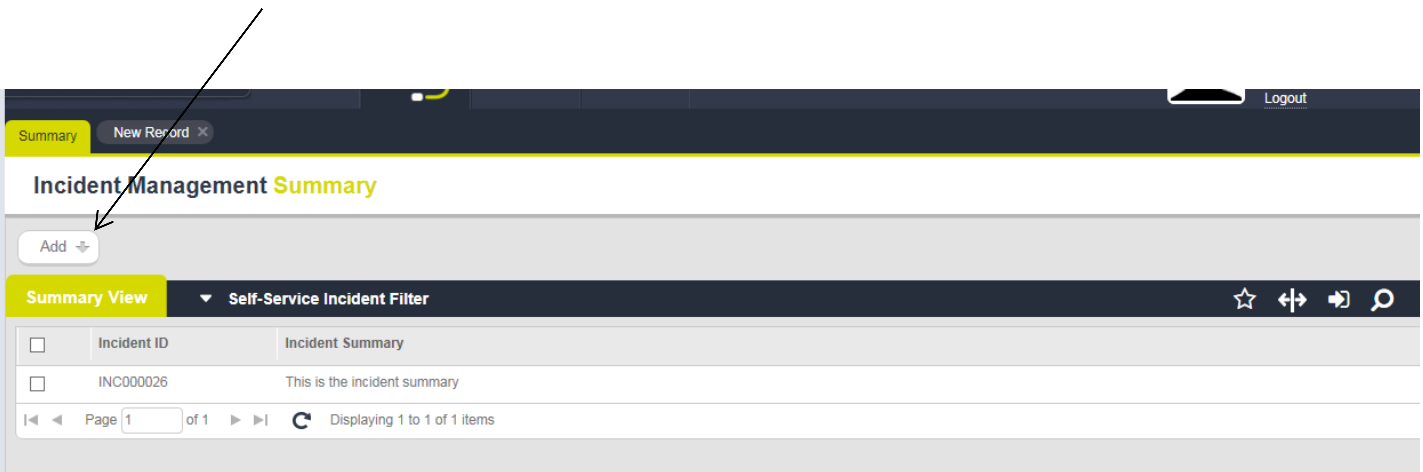
There are two layouts for **Summary screens**, **Classic** and **Template Filter**. In the **Summary screens filter** list, the icon beside each filter name shows whether it is a **Classic** or **Template Filter** layout. Only the **Template Filter Summary** displays the tags in each record.

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.

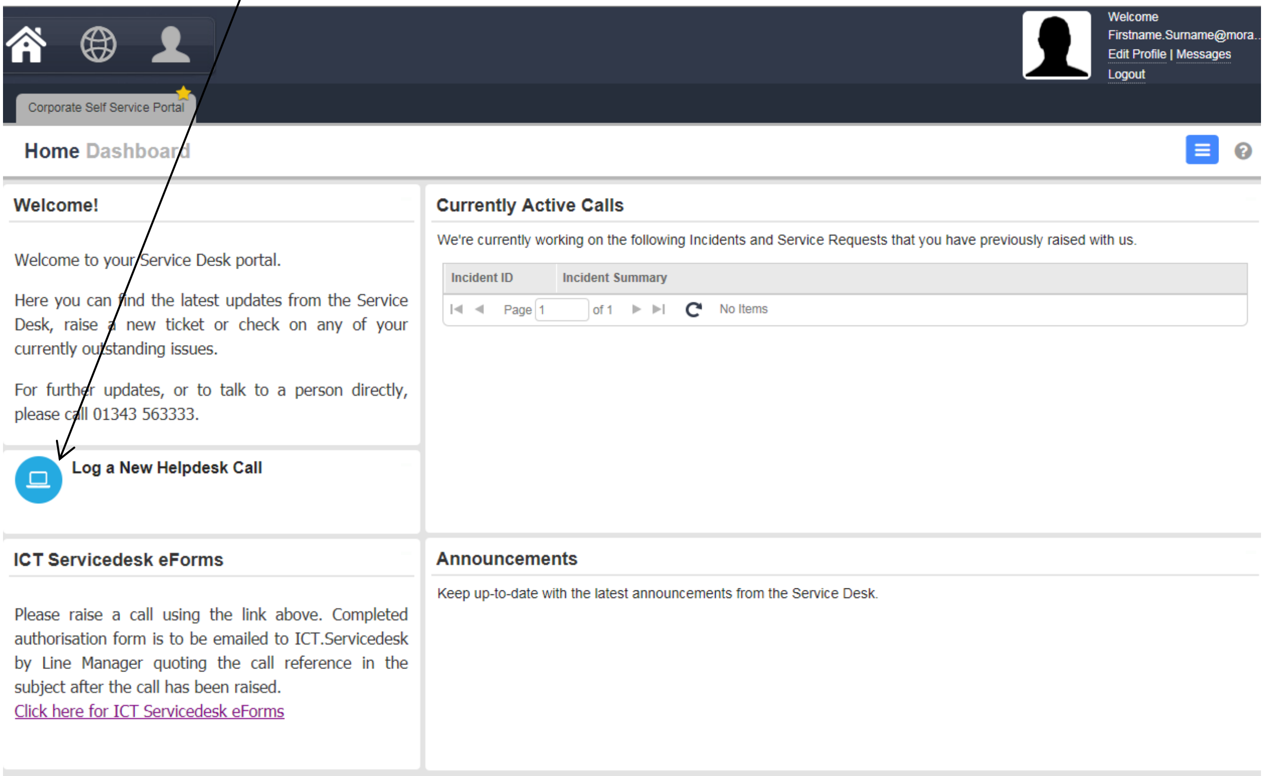
Adding a new incident

You can add a **new incident** via the Incident Management Navigation Bar, click 'Add'.



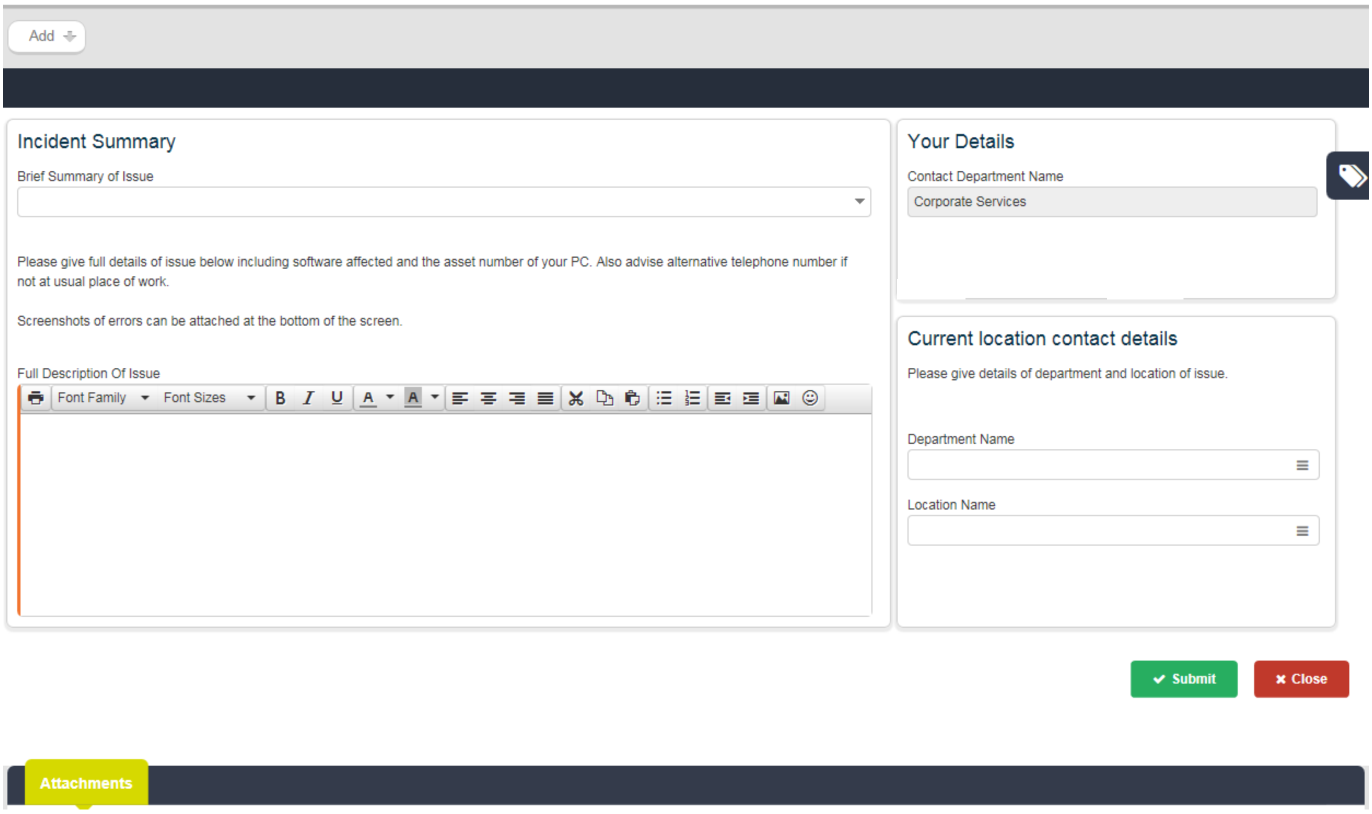
OR

Via your **Home Dashboard** icon

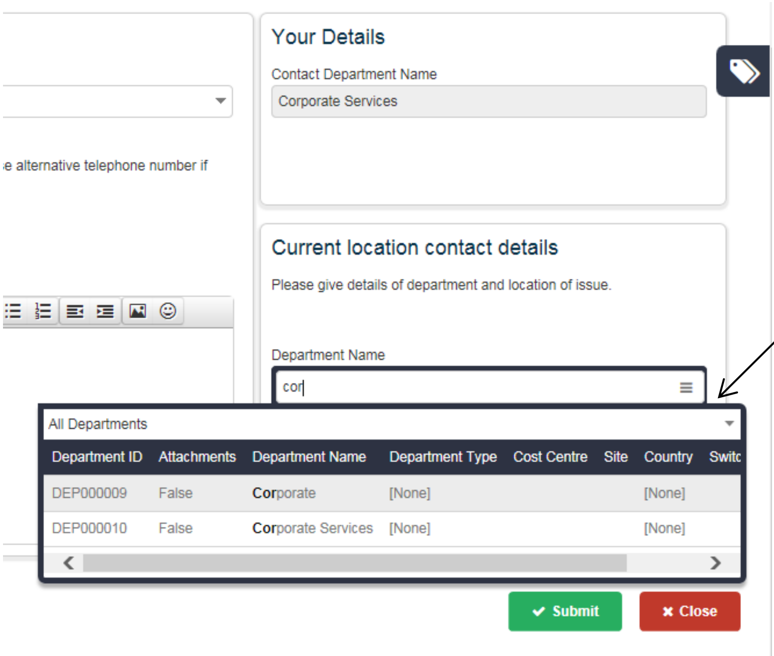


To enter in the details of the incident, type in a brief summary in the '**Brief Summary of Issue'** and a full description of the issue (including any asset numbers or software titles). You may add any files in the attachments by clicking select in the bottom tab. Once you have confirmed all information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

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



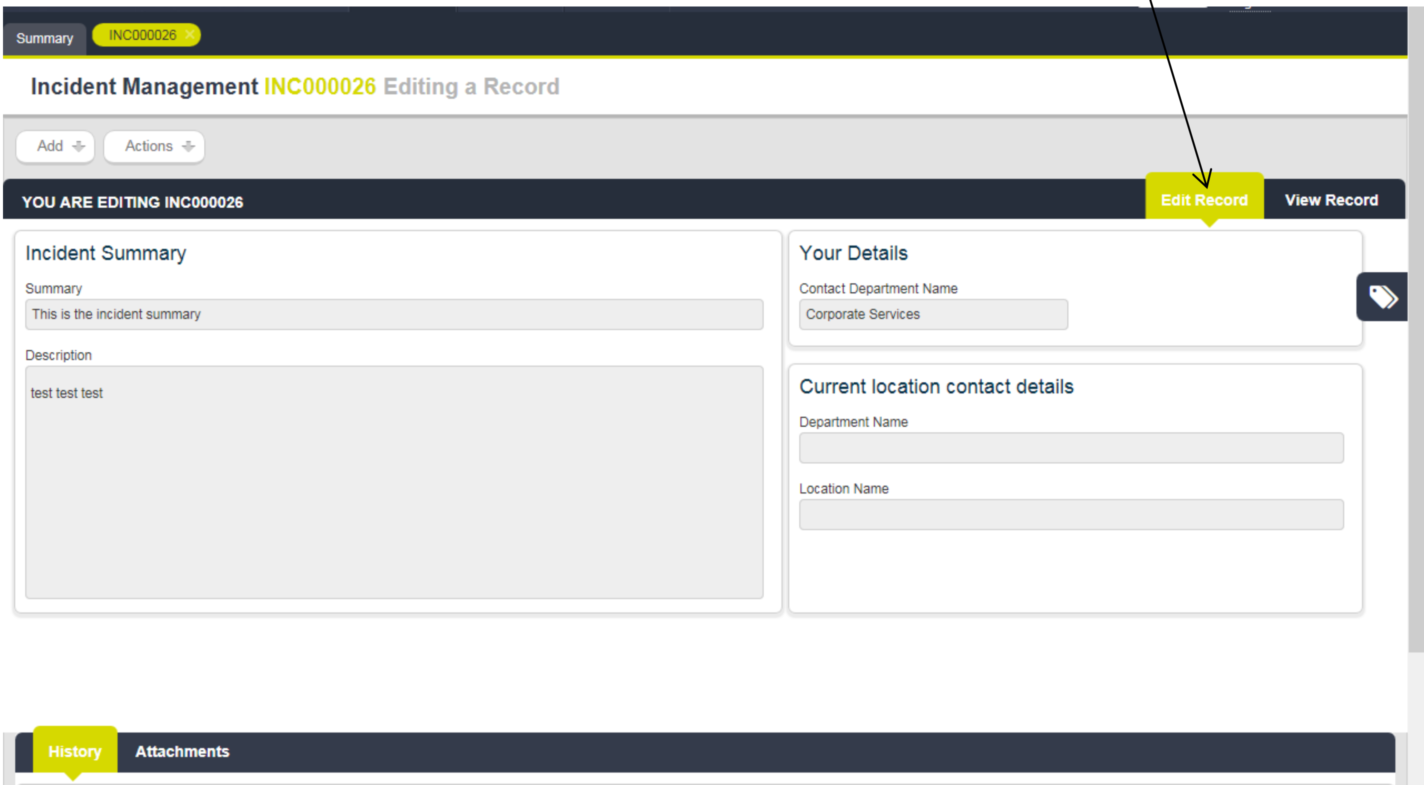
Add an attachment, windows explorer will open, navigate to the file and press open to attach file to incident



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

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).

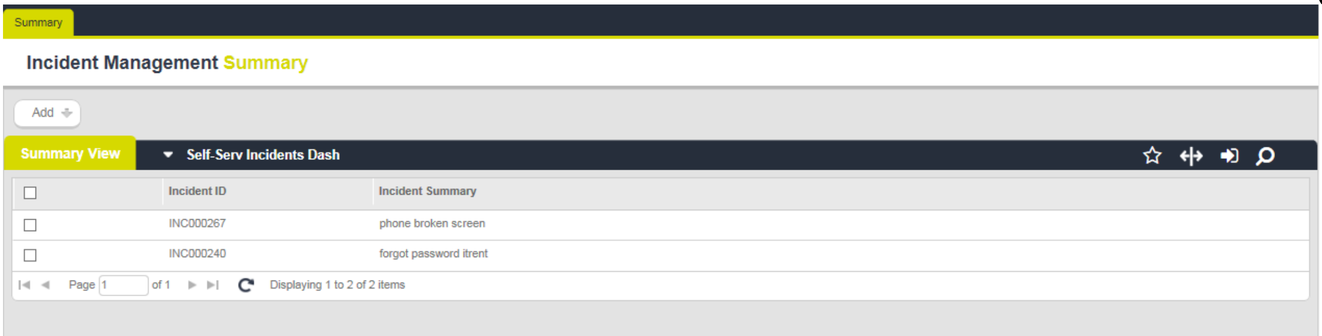
Tracking Incidents

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

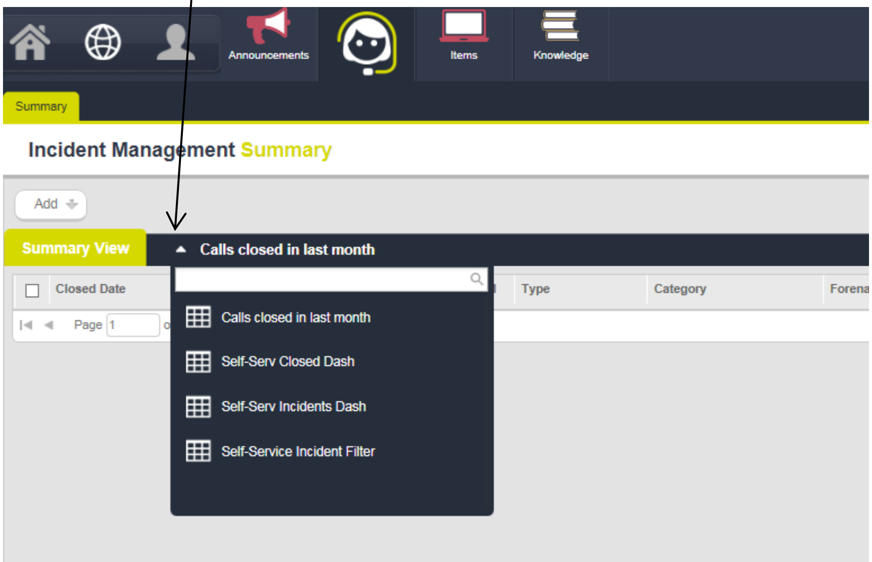
If you click on the **incident**, the details will open and you can track the progress of the **incident**.

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

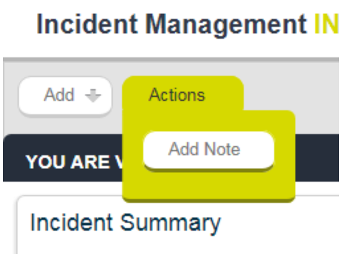


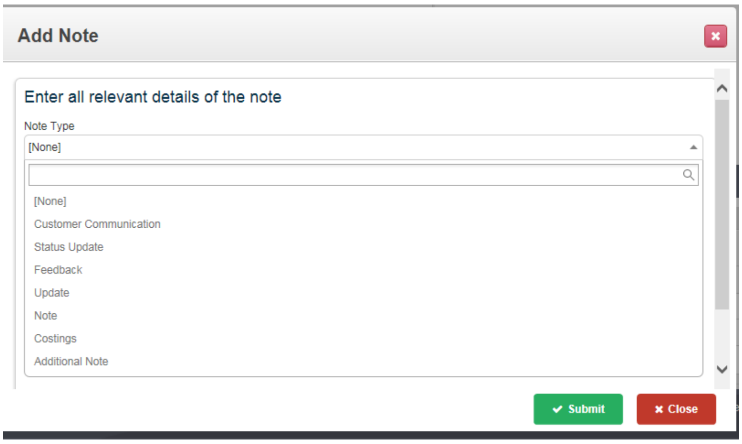
View the history of the actions to see historic actions/date/time/details etc.

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

Notes

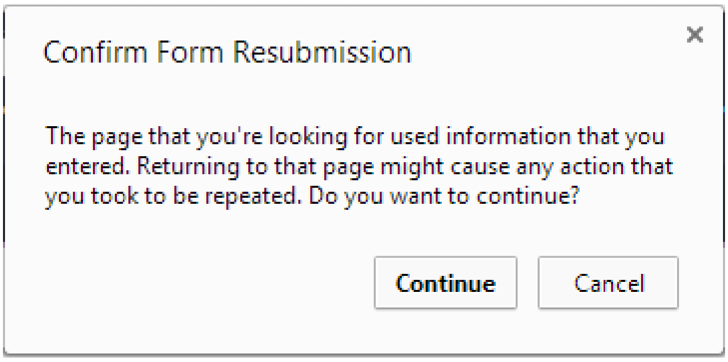
You can **add notes** relating to the **incident**, once submitted, the detail will be shown in the history. This icon can be found under the **Actions** (only when a record is created). Select an option from the drop down list (using the small arrow) and enter in note details and press submit.





Refreshing the Base screen

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



Any queries?

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