

Service Desk Customer Portal

Customer Portal Reference Guide



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Document control

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Contents

1 Introduction to the Service Desk Customer Portal	3
1 1 Supported Browsers	3
1.2 Accounts for Multiple Organisations	3
2 Accessing the Customer Portal	5
3 Accessing Your Customer Portal Account	7
3.1 Login Credentials	7
3.2 Primary Business Unit Contact Details	7
3.3 Forgotten Passwords	7
4 Setting a New Password	9
4.1 Forgotten Password Steps	9
4.2 Password Reset Confirmation	10
5 Using the Customer Portal	11
5.1 All My Services	11
5.2 Impacted Services	12
5.3 All My Requests	12
6 Logging a New Support Request	13
6.1 General Advice	13
6.2 Selecting an Incorrect Service	13
6.3 Listing Multiple Issues	13
6.4 Logging a Request	13
6.5 Completing the Request Form	14
6.6 Using the Knowledge Centre	15
6.7 Completing the Summary and Description Sections	16
6.8 Setting your Request's Priority	17
6.9 Request Validation	19
6.10 Adding Files to your Request	20
7 Viewing Support Requests	21
7.1 Viewing Methods	21
7.2 All My Requests	21
7.3 Active	21
7.4 All My Services	22
7.5 Viewing Your Organisation's Requests	23
8 Navigating Your Request	25
8.1 Head Up Display	26
8.2 Key Information	26

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8.3 Details	26
8.4 Questions	27
8.5 Attachments	27
8.6 Timeline	27
9 Updating Requests	29
9.1 Adding a Textual Update	29
9.2 Uploading an Image	29
9.3 Notification of an Update	31
9.4 Do's and Don'ts when Updating	31
10 Setting your Request to "Resolved"	33
10.1 Advising the Request can be set to "Resolved"	33
10.2 Request Closure	33
10.3 Request Resolved Notification	33
11 Customer Communication	35
11.1 Bulletins	35
11.2 Announcements	35
11.3 Known Issues/FAQ's	36
12 Finding Documents & Downloads	37
12.1 Finding Documents	37
12.2 Alternative Method	41
12.3 Finding Software Downloads	42
13 Feedback	47
14 Contact Us	49
14.1 Primary Business Unit Contact Details	49
14.2 Worldwide Office Contact Information	49



1 Introduction to the Service Desk Customer Portal

The Service Desk Customer Portal is the recommended method for logging new requests and provides the following benefits

- Ability to **log** new requests in real-time
- View responses and make updates directly onto your request
- **Track** request progress and view request status in real-time
- Upload, download and view attachments on your request
- Provide feedback on your resolved requests
- Locate up-to-date documentation, upgrades, service packs and patches for your Idox software
- Receive **notification of updates** for your Idox products
- Access to FAQ's and documents relevant to your services

1.1 Supported Browsers

- Windows Edge
- Chrome The latest version in the Chrome Stable Release Channel
- Firefox All versions, but the latest is preferred
- Safari Version 6.1.5 or above

Please ensure that cookies are enabled in your browser when accessing the Customer Portal site

1.2 Accounts for Multiple Organisations

If you undertake work for multiple organisations who use Idox software you will need a **unique email address alias** for **each organisation**. This will enable you to log requests for the individual organisations, ensuring that the organisation specific services are available to you. Similarly, for auditing and identification purposes, an individual login to the Customer Portal will be required

Generic or group email addresses are **not** supported

The **Customer Portal** is used across the **Idox Group** to provide a central point of contact for you to interact with us. We provide **technical support** to many business areas including:

Public Sector, Health, Transport, Social Care, Facilities Management, Engineering and Elections





2 Accessing the Customer Portal

The Customer Portal can be accessed from https://customer.servicedesk.idoxgroup.com/idoxsd

You can also access the Customer Portal using direct links from emails. Direct links are included in emails sent from Service Desk, both within the body of an email as well as in the footer

Hi nnnnn RE: <u>IDXIN00123456 click here to view/update</u> - Outstanding service desk incidents



These links point customers to the Customer Portal login screen



Click on the Login link in the top right-hand corner of the page to open the Sign In page





3 Accessing Your Customer Portal Account

3.1 Login Credentials

To log in to your Customer Portal account, you will require a **Login ID** and **Password**. Your Login ID will normally be your email address.



3.2 Primary Business Unit Contact Details

If you **do not** have an existing **Login ID and Password**, please contact your **primary business unit's Service Desk** via their normal telephone number or email contact address:

- Local Government, CAFM and Elections servicedesk@idoxgroup.com 03330 111 444
- Idox Cloud (Tascomi) cloud.servicedesk@idoxgroup.com 03330 111 555
- Digital Services servicedesk@idoxds.com 03330 111 677
- Social Care openobjects.servicedesk@idoxgroup.com 03330 111 668
- OPIDIS (Engineering) support-opidis@idoxgroup.com Fusion Live supportfl@idoxgroup.com
- Transport transport.servicedesk@idoxgroup.com 03301 243 470/04433 01243 470
- Health (including Lillie) health.servicedesk@idoxgroup.com 03301 245 555

3.3 Forgotten Passwords

If you **do** have an existing **Login ID**, but have forgotten your **Password**, please follow the instructions in the **Setting a New Password** section below.

You will also need to follow the **Setting a New Password** process to enable you to access your new Customer Portal account





4 Setting a New Password

These steps should be followed if you have forgotten your Customer Portal password or if you are logging into your account for the first time. It is essential that you comply with the security requirements or you will be unable to log in. Your secure password **must** be **at least 6 characters** and **contain numbers, letters** and **a special character** such as "!" It **cannot** be a password that has previously been used

4.1 Forgotten Password Steps

	idox
	• Error An unexpected error occurred during login. If this problem persists, please contact your Hornbill administrator
If you have forgotten your password, or need to change the password on a NEW Customer Portal account, please click on the Forgot Password link on the Sign In page and follow the on-screen instructions	Login Id fred.bloggs@anywhere.com Password FORGOT PASSWORD

Reset Password

Login Id

fred.bloggs@anywhere.com

BACK TO LOG IN

Click on the **Submit** button

Then on Back to Login



As long you have entered a valid **User ID**, the system will email you a link to allow you to reset your portal password. This link expires after **24 hours**, after which you will need to repeat the **Forgot Password** process

If you are still experiencing an issue, please contact your **primary business unit's service desk** via their normal telephone number or email contact address



4.2 Password Reset Confirmation

You will now receive a system generated email detailing the steps to follow to re-set your password. Please note the **From:** email address will be: **password-reset-idoxsd@live.hornbill.com**

Clicking on the **Confirm Password Reset** link will bring up the following Customer Portal dialogue box:

	Log in to
	idox
	Change password for fred.bloggs@anywhere.com
	New Password
Enter an new secure password and then click on Submit	Retype Password
This must be at least 6 characters and contain numbers, letters and a special character such as "!"	
It cannot be a password that has previously been used	BACK TO LOG IN SUBMIT

If **any** of the above conditions are not met you will receive a generic error and be unable to log into your Customer Portal account

When a secure password has been set, you will see the following message:

Click on **Back to Login** and log into your account with your **Login Id** and your new **secure** password





5 Using the Customer Portal

5.1 All My Services

Once you have logged into the Customer Portal you will be presented with the **Home** screen view of the Services you are subscribed to:



https://customer.nombil.com/idoxsd/servicemanager/	2 A Q 18 U
idox	My Documents My Services Profile Logout
The second s	
Idox Customer Portal - Myur	i-form has now been merged with this portal
Hence log in and head to the Announcements section of the Tunko	Orent, Usprade & Unifice Licensor," "LE- 1 Mail Land Ownpor" or "More - Nable Access" services to learn more
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	ied 🗄 All My Requests 🖨 All My Services 💙
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Uniface Licensing Uniform - Building Un Requests INTERNAL Control Upg	iform - Client, rades & Uniform - Connectors Uniform - Enterprise Uniform - Uniform - Enterprise Uniform - Uniform - Enterprise Uniform - Environmental
Replacement Uniface Building Control, (formally Compuware) Dangerous Structures, Unifor licenses where required	Construction Uniform Connectors m Clients, Upgrades including UV/S. Environmental Health, iding Service Requests and all
for U Competent P and	Patches) and Un sub modules

Clicking on an icon will take you to that service's page:

Click on Home located at the top left of the screen to return to Home screen	Home / My Servers / Lahtern - Canacitan Winform - Connectors Lahtern Canacitans Induing UNA. 1 Mole is Recurit I Alon. Counterts	🖤 🕑 Available
Home ' My Services / Uniform - Connectors	1APP Connector LAPP Connector	Accidents Connector
	Building Control Connector Building Control Connector	Commercial Premises Connector
	Common Connector	Consumer Direct Connector
	Enforcements Connector Enforcements: Connector	GMS Connector GMS Connector
	MIN Licensing Connector	Inspections Connector Inspections (DNA) Connector
		Planning Connector Planning Connector
	Residential Premises Connector Residential Premises Connector	Risk Assessment Connector Risk Assessment Connector
	Samples Connector	Scottish Building Standards Connector
	Service Request Connector Service Request Connector	Uniform Web Services (UWS) Connector Uniform Web Services (UWS) Connector
	Download - Connector For download Utility Connectors including the Unitern Web Bineters (UMI9) Connectors	





5.2 Impacted Services

From the **Home** screen you can also navigate to which of your Services are experiencing issues by clicking on **Impacted**. Hovering your mouse over the warning triangle will give you the current status of the service

		Impacted 📙 All My R	equests 🖨 All My Service	s 🔹	
This service is not yet in	n live use.	• •		a 🔊	
Deerline	GDAS LDL	groundMapper	Location Centre	NCAP	Ofgem
Support for NatureScot's Deerline Application	Support for Legal Deposit Library's GDAS system		Location Centre support	Support for NCAP's Footprint Cataloguing Application	Support for Ofgem's ECO Eligibility System

5.3 All My Requests

Clicking on **All My Requests** will display a list of requests logged by you

Total: 0			Active N
Reference 🗘	Summary 🗘	Service Catalog Item Customer Date Logged	Status 🗧 Sub-Status



6 Logging a New Support Request

6.1 General Advice

It is important that when you log a **new** request that it is for **only one issue** and that it is logged against the **correct service**

If you are unsure of the **service** or do not appear to have an **required service** listed, please contact your **primary business unit's Service Desk** via their normal telephone number or email contact address and request that the service is added to your profile

Services will only be added if the business has subscribed to that service

If businesses are in the process of **Idox** running projects for them **(In Project)** to transition software platforms or upgrade products, services relating to those platforms will generally be unavailable and you will be unable to log **Service Desk** requests until the project has had **Business as Usual (BAU)** signoff

Before **BAU** signoff, any issues relating to the project will need to be raised with your **Project Manager** who will add them to the project **Issues Log** to be dealt with by the project team. After **BAU** has been signed off, the related services will be available and you can log support requests with **Service Desk**

6.2 Selecting an Incorrect Service

Selecting an **incorrect service** may result in a **new** request being logged for you under the correct service and the original request then being closed. You will be advised by email if a new request is required

6.3 Listing Multiple Issues

In the case of multiple issues listed, it **may** be necessary to create a new request for **each issue** raised and the new requests assigned to the appropriate Service Desk teams. You will be advised by email if new requests are required

Logging multiple issues within one request or selecting the incorrect service **will** result in a delay in the processing of your request whilst the errors are corrected and the request(s) routed to the correct team

6.4 Logging a Request

Once logged into your Customer Portal account, you will presented with the services that you are subscribed to on the **Home** page





Click on the icon for the service which you need to request support with, in this example, **Idox – Public Access**



You are presented with a number of tabs depending on the service, click on the **Make a Request** tab. This tab shows the list of **Public Access** modules for which you can log a request

Mapping	Building Control
Issue with Mapping within Public Access	Idox PA for Building Control (England and Wales)
Building Standards	Planning
Idox PA for Building Standards (Scotland)	Idox PA for Planning (England, Wales and Scotland)
Licensing	Apache Web Server
Idox PA for Licensing	Issues with Apache Web Server.
Central Functions Issues with Public Access common functions such as Admin, PA Connecter, Profile Tracker etc	OMT Online Measuring Tool (OMT) with Idox PA issues.
Download - Public Access	OMT Upgrade License Request

6.5 Completing the Request Form

Click on the required module and you will then be presented with a form to complete to log your request. For this example the **Mapping** module

Cancel	
Summary	Please enter the request details Summary: Description:



6.6 Using the Knowledge Centre

Upon entering your text into the **Summary** field the **Knowledge Centre** facility is activated and you will be presented with a number of **FAQ's**, **Catalog and Announcement** options to view, based on the text entered. The **FAQ** section in particular may answer your question, negating the need to log a request, though the results are currently fairly generic. This facility is being developed.

< Cancel	
Search not Description	Summary: Search not O Description:

Click on the appropriate button to receive a list of options Which will display as below:



E FAQs 99	Catalogs 2	Announcements 7
Eros - Canvass communications - Example	e CSV files	•
Building Control - Getting Started		٠
Inspections Guide		•
Premise Guide		•
Initiatives Guide		•
Private Tenancy Guide		٠
Management Information Guide		•
Getting Started with Environmental Healt	th	•
Service Requests Guide		•



You can move through the pages of information by using the bar at the bottom of the page



Clicking on the tab will open a dropdown displaying the requested information:

Knowledge Centre 🚥		×
E FAQs 99	Catalogs 2	🛋 Announcements 7
Getting Started with Care		٠
Contacts		٠
Requests		•
Create New Request On creating a new request with the wizard the user is ta a request:	st (Wizard) ken through a number of stages in order to cre	eate the request. There are 6 stages to creating
1. Who? – Who is submitting the request 2. What? – What the request is 3. What? (cont.)– Further information on the reque	st	

6.7 Completing the Summary and Description Sections

When populating the Summary	Summary
and	Member of public having difficulty registering on Public Access
Description fields it is important to give accurate and	Description
relevant information as this will help your analyst to investigate	Can I please log a call for a member of the public who is having difficulty registering on our Public Access site.
the issue more efficiently	They have tried to register but the system would not allow them to complete their registration. They receive the email notification to complete registration, however when they click on this,
Please provide as much information as possible, including steps to replicate the	they get the following error: [Graphical user interface, application Description automatically generated]
issue	They have tried to re-register, but when they do they get this error: [image0.ipeg]
When attaching screenshots or files to the request, please ensure that all personal information has been removed	I went into Public Access admin and delete them from the list of users and asked them to re- register again hoping that would solve the issue, but they have come up against the same problem, it wont let them complete the registration.
or redacted , and that a full screen screenshot of the error is provided	I can see them in the list of users, they have a date in the 'Date Consent Received (GDPR)' field, but no date in the Last Login field (this is just blank).



Click on the Next button to step through the form – where you see a **red *** next to a heading, the field

is mandatory to complete and you will not be able to continue unless a value is entered

Version *		
v3.3.1		•
v3.4.0		
v3.4.0.1		
v3.4.1		
v3.4.1.1		
v3.4.2		

There is a dropdown on some fields, sometimes with a sidebar to scroll down a list to select a value

Once a value is entered, there is the opportunity to move	Cancel	
to Previous and Next screens, as well as to Cancel the	Version *	
request		Previous Next

The forms are **dynamic** and use **progressive capture** so you will be presented with questions and options based upon your responses. Your choices will also determine the type of request that is logged which will be reflected in your IDX reference number.

IDXIN00nnnnn is for an Incident, used for software or system faults IDXSR00nnnnn is for a Service Request, used if you are asking for a new Customer Portal account(s) or requesting pointers to documentation etc IDXCR00nnnnn is for Change Requests, often for Hosted customers

6.8 Setting your Request's Priority

A particularly important screen is setting the **Requested Priority** of your request. There is guidance on the form detailing the issues the Priorities relate to and different businesses have their own set of Priorities to select from. The Default priority is **Enquiry**

If the 1st Tier analyst validating your request sees that the asked for **Priority** doesn't match the **Description** they will amend it, usually in consultation with a 2^{nd} Tier analyst

If a request is logged with a **High Priority** (**Urgent** on **Idox Cloud** requests) where a **Total System Failure** hasn't been described in the **Details** section, the 1st Tier analyst will consult with a member of the



appropriate 2nd Tier team to confirm a more appropriate level. You will then be advised by email of this change

The example below is for **Idox - Public Access**, usually used by local government customers. **Idox Cloud, Health, Transport and Engineering (Opidis) have their own priority lists**

Enquiry	
Guidance for selecting Priority	
 High - for Total System Failures. 	14 Dr. to the AMERICA AND ADD
 Medium - for Important or Critical component has f 	ailed causing partial failure of the system.
 Low - for isolated issue that does not fall into the ca 	tegories listed above.
 Enquiry - request for advice or clarification. 	
For more details please see the Service Desk Guidlines.	
Please select the impact experienced	
×Moderate	×
Nease select the urgency for this to be resolved	×
Moderate Please select the urgency for this to be resolved High	×
X Moderate Please select the urgency for this to be resolved High four Reference	× ×
× Moderate Please select the urgency for this to be resolved × High Your Reference MASI	×
Moderate Please select the urgency for this to be resolved High rour Reference MASI 'lease enter your reference for this request.	× ×
Moderate Please select the urgency for this to be resolved High Your Reference MASI Please enter your reference for this request.	×

The other sections of the page are **voluntary**, giving you the opportunity from dropdowns to state the **Impact** and **Urgency** of the issue to you or the business

The final screen of the request logging process will give you the opportunity to upload any attachments for the request.

Once files are added, click on Finish button

Nonce de net attach any files er sereenshets whi	ch contain narconal identifiable data
Please do not attach any mes of screenshots which	ioading
lease redact any personal information before up	loading.
her guidance please contact your internal data c	ontroller.
Choose a fi	le
or drag it he	re
ste image here	
oto intego noro	



6.9 Request Validation

Once your request has been logged you will be taken automatically to your new request which will show your request reference number – **IDXIN00397719** in this case

			~		
Validation	Response	Investigation	Resolution		Er
6			Logged On	09/06/2022 15:28	
Post Something New			Target Resolve By	05/07/2022 15:28	
			Status	Open	
Details		~	Sub-Status	▷ New	
			Catalog Item	Planning	
Summary					
Test Request Only					
Description					
This is a TEST Request					
This is a TEST Request Please assign to MASI					
This is a TEST Request Please assign to MASI Questions		9 ~			
This is a TEST Request Please assign to MASI Questions Attachments		© ~ 0 ~			
This is a TEST Request Please assign to MASI Questions Attachments Fimeline		© ~ • • •			

Your request will then be automatically assigned to a 1^{st} Tier analyst for **validation** and then be assigned to a 2^{nd} Tier analyst in the appropriate team to investigate your issue

As part of the assigning process, you will be sent a **Request Validation Notification** email which will show on your request



6.10 Adding Files to your Request

Don't worry if you forget to add your attachments when completing the form, they can easily be added to a request once the validation has been completed – Click on the **paper clip icon** – then either click on the **Upload Document** button or drag and drop your file **within the dashed lines.**

Add a comment Upload Document OR Drag and drop your document here, IMPORTANT - Please do not attach any fi
Upload Document
Upload Document OR Drag and drop your document here. IMPORTANT - Please do not attach any fi
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ipioad Document UK Drag and drop your document here. IMPORTANT - Please do not attach any fi
pload Document JOK Drag and drop your document here. IMPORTANT - Please do not attach any fi

Once you've added the files, don't forget to then click on the

Upload button

The number of Attached files will show on the Attachments bar



Attachments can be viewed by clicking on the **Attachments** bar and files can be **downloaded** to view by clicking on the required file





7 Viewing Support Requests

7.1 Viewing Methods

Logged support requests can be viewed through your Customer Portal account in a number of different ways by clicking on one of the options on the bar at the top of the home page, under the search bar



7.2 All My Requests

Click on the All My Requests button and then click on the IDX number to view that request

		Active	M Impacted	All My Requests	🕀 All My Se	rvices 🗸		
Total: 1							&	Active 🗸
Reference 🕆	Summary ©		Service 🗘	Catalog Item 🗘	Customer #	Date Logged 🗸	Status 🛊	Sub-Status 🗘
IDXIN00397719	Test Request Only		Idox - Pu	Planning	Fred Bloggs	09/06/2022 15:28	Open	New

This option can also be used to view **Closed** requests or **All** of your requests in one list by clicking on the **All** button and selecting a view from the dropdown

	C Active Active	mpacted	All My Requests	🕀 All My Sei	rvices 🔹		
Total: 3 Reference \$	Summary ÷	Service \$	Catalog Item \$	Customer \$	Date Logged 🗸	ය Status :	All Active Closed
IDXIN00397719	Test Request Only	Idox - Pu	Planning	Fred Bloggs	09/06/2022 15:28	Open	Pending
DXSR00379104	Download Request - Previous - Unimap 10.5.1 - Uni	Uniform -	Download	Fred Bloggs	07/02/2022 09:59	Closed	
IDXSR00379034	Download Request - Previous - Unimap 10.5.1 - Uni	Uniform -	Download	Fred Blogas	04/02/2022 16:38	Closed	

7.3 Active

Click on the **Active** button, which will show the icons of the services that you have **open** requests logged for.

This button will **not** show if you have no **open** requests





This takes you to the product page where you click on the **Requests** tab and then on the **IDX** number of the request you wish to display

Idox - Pub Idox Public Acce	lic Access ss including Planning, Buildir	ng Control, Building Stand	ards and Licensing.			٩	O Available
Make a Request	E Requests	FAQs	Announcement:	s 📮	Documents		
Total: 1						ය	Active 🗸
Reference \$	Summary \$	Service \$	Catalog Item 🗘 🛛	Customer 🗧	Date Logged 🗸	Status 🕆	Sub-Status ≑
IDXIN00397719	Test Request Only	Idox - P	Planning Fr	ed Bloggs	09/06/2022 15:28	Open	New

7.4 All My Services

Click on the **All My Services** button where the icon for your services shows whether there is a support request active for it

		° @ 0	£\$.	See .	⊞
Icarus	Idox - Document Management System	Idox - Public Access	Idox Cloud Affordable Warmth	Idox Cloud Animal Welfare	Idox Cloud Building Control
Bus, tram and train real	Idox - Document	Idox Public Access	For logging Incidents.	For logging Incidents.	For logging Incidents.
system for fleet manag	Management System	Building Control, Building	Questions and Tasks.	Questions and Tasks.	Questions and Tasks.
· · · ·		Stan	Enhancement Requests	Enhancement Requests	Enhancement Requests
			shoul	shoul	shoul

Clicking on the icon takes you to the product page where you click on the Requests tab to view your logged requests

Home / My Services /	Idox - Public Access			
Idox - Pub Idox Public Acces	lic Access s including Planning, Buildin	g Contr <mark>ol</mark> , Building St	andards and Licensing.	
① Make a Request	E Requests	E FAQs	Announcements	Documents

Click on the required **IDX** number to view that request

) Make a Request	I⊟ Requests	E FAQs	Announcements	Documents	
Total: 1					Active 🗸
Reference *	Summary =	Service	≜ Catalog Item≜ Custor	mer Date Logged -	Status : Sub-Status :



7.5 Viewing Your Organisation's Requests

Subject to Service Desk adding the permissions to your account, email servicedesk@idoxgroup.com, you will be able to view and update **all** Customer Portal requests logged by members of your organisation.

Due to the security considerations implicit in you viewing colleagues' requests, we will ask you to supply written authorisation from your **line manager/supervisor** or **data controller** to authorise us to make this change to your account. Once authorisation has been received, the required change will be made

Once the permissions have been added, you will be able to click on the **All My Requests** button, then from the dropdown on the right side select **My Organisation's Requests**. This will enable you to view and comment on all of your colleagues requests

		(Active	Impacted I	E All My Requests	All My Se	ervices 🗸		
Total: 1						Active ~	My Requests	~
Reference ‡	Summary \$		Service \$	Catalog Item	Customer	Date Logged 🗸	My Requests My Organisatio	n's Requests
IDXIN00397719	Test Request Only		Idox - Pu	Planning	Fred Bloggs	09/06/2022 15:28	Open	Updated by Cus

The dropdown next to **All My Requests** allows you to change the view **All, Active** or **Closed** requests under either the **My Requests** or **My Organisation's Requests** views

Please note that the **Active** button isn't showing on the image below as all requests for customer **Fred Bloggs** have been closed

		🗄 All My	Requests 🖨 A	l My Services		
Total: 204					All All	My Organisation's Requests 🗸
Reference ¢	Summary ≑	Service \$	Catalog Item ‡	Customer 🗧	Date L Closed	Status 🗘 Sub-Status 🗘
IDXIN00401188	Test Request	Idox - P	Planning	Fred Bloggs	14/06/2022 17:31	Closed
DXSR00400884	Download Request - Security Patches for all Suppor	Z Test S	TEST DOWNLOA	Martyn Hough	13/06/2022 13:40	Closed
IDXIN00397719	Test Request Only	Idox - P	Planning	Fred Bloggs	09/06/2022 15:28	Closed Off Hold
DXSR00396627	Download Request - Uniform Functions - Uniform_	Uniform	Download - Stand	1st Tier Servi	01/06/2022 11:34	Closed
IDXSR00396538	Download Request - Uniform Functions - Uniform_	Uniform	Download - Stand	Dave Hall	31/05/2022 16:24	Closed



The **Export** button allows you to download a .csv file of your requests





8 Navigating Your Request

Once you have opened the required request there are a number of fixed sections, populated at the time of logging it, some of which can be amended upon request

idox				My Documents	My Services	Profile	Logout
Home / My Services / Id IDXIN003977 Test Request Only	ox - Public Access / IDXIN00397719						
0	0			0			
Validation	Response	Investigation		Resolution			End
Post Something New				Supported By Logged On Target Resolve B	Mark Sin 09/06/20 y 05/07/20	gleton 022 15:28 022 15:28	
Details			\sim	Status	Open		
Summary				Sub-Status Catalog Item	▷ Pendir Planning	ng	
Description							
This is a TEST Request							
Please assign to MASI							
Questions			8 ~				
Attachments							
Timeline			\sim				

The request view is made up of the **Head Up Display** (HUD), **Key Information**, **Details**, **Questions**, **Attachments** and **Timeline**, the last four of which can be expanded or hidden by clicking on the down arrows on the right hand side of the information bars

Hidden

Details	V)
	_	

Expanded

Details	~
Summary	
Test Request Only	
Description	
This is a TEST Request	
Please assign to MASI	



8.1 Head Up Display

The display is shown at the top of your request and is a graphical display of its progress to resolution. The standard display is shown below

IDXIN0039 Test Request Only	7719			
0				
Validation	Response	Investigation	Resolution	End

If you click within the display, further information will be shown and if you click on the pin button to the bottom right, that view will remain on all of your requests

alidation	Response	Investigation	Resolution
Request Validation	Assigned	Investigation Started	Confirmed Resolution
	- Email Confirmation	Investigation Complete	Request Resolved
	Confirmation	Investigation Complete	Request Resolved

8.2 Key Information

The panel on the top right side of your request displays information about your request;

the **Supported By** field shows the name of your analyst, **Logged On** shows when the request was logged, the **Target Resolve By** date for the request, based on the priority set, the request **Status** and

Sub-Status show the current condition of the request,

and the Catalog Item shows the service selected

Supported By	Mark Singleton
Logged On	09/06/2022 15:28
Target Resolve By	26/07/2022 13:01
Status	On Hold
Sub-Status	DD Awaiting Customer Response
Catalog Item	Planning

8.3 Details

The original Summary and Description section are shown here and customers are not able to edit this section. Your analyst can amend this field on request

Details	~
Summary	
Test Request Only	
Description	
This is a TEST Request	
Please assign to MASI	



8.4 Questions

This shows the information requested at the time of logging the request and the questions will vary depending on the service and module selected at the time of logging the request. This field is not editable

Questions	8 ~
Version	
- Not Listed, please state in description	
Environment	
Live	
Requested Priority	
Enquiry	

8.5 Attachments

This section shows any attachments appended to the request, either by yourself or colleagues, the analyst or any third parties from Idox or the customer

Attachme	nts	0 ~
ß	Finding Documents _ Downloads on the Idox Customer Portal.pdf (1.5 MB) 09/06/2022 15:28	

8.6 Timeline

This shows **any** updates made on the request and is ordered chronologically, with the most recent details being at the top of the list and going back in time as you scroll down.





There is an option on the righthand side of the section on the blue down arrow to adjust this order to one of the following:

most recently posted – will order the timeline entries by the date the original post was made, irrespective of any subsequent comments.

most recently updated – will order the timeline entries by the latest date on the post and its comments.

The recommended setting is **most recently updated.** Also within this section you have the ability to **Filter** the timeline entries by type

Filter -	most recently updated -
Fred Bloggs Please see the attached screenshot	most recently posted most recently updated
Comment	

Click on the **Filter** option to display the selection types which you can scroll down

You can add multiple selections by clicking on them and they will be indicated by a tick against the type

To remove the filter, click on the **All** option.





9 Updating Requests

Once you have opened the required request you are able to update it with a message and add attachments should you need to. Please remember to remove any personally identifiable information from attachments or ensure it is properly redacted

9.1 Adding a Textual Update

by clicking on as described in section 6.8

Text can be added to requests using the \square symbol at the top left of your request.

Just click in the Post Something New area to enter your update/request. You can also add attachments

lation	Response	Investigation

9.2 Uploading an Image

You can also add an image to the text by clicking on the **Upload Image** icon which will invite you to Upload or drag and drop your file(s) to inform your textual update

lease comment on th	e image I have attached	
	Upload Image Or drag it here	

NB: The option to **drag and drop** a file, will be dependent on your browser support and your local security settings. If this option does not work, please use the **Upload Image** button and contact your **local IT** Support provider for assistance with your browser configuration

When uploaded, the image will display, but can be cancelled by clicking on the Symbol shown at the top right hand side

	i
Home > Planning and Building Control Solutions	0
🔎 Search 🔸 🛔 My Profile 🖌 💼 Login 📑 Register	
Error	
Server Problem A server problem prevented the webpage from displaying. Try again later to see if the problem has be	en corrected.

at the top right of the image. Once you have found the appropriate image, click on the add your update which will display on the **timeline**

button to

Post

Timeline	~
Filter 🕶	most recently updated \blacktriangleright
Fred Bloggs Error message attached	Jun 15, 2022 10:40:09 AM
Exotes - Elemenny and Building Control Solutions.	
🔎 Search - 🏦 My Profile - 🏫 Login 🔯 Register	
Error Server Problem A server problem prevented the webpage from displaying. Try again later to see if the problem has been corrected.	
🖒 🗵 Update	
Comment	

Clicking within the post gives an enlarged view of the image with the timeline down the right side. Click on the Symbol shown at the top right hand side of the post to close it

i de la constante de la consta	My Documents	My Services Profile Logout	0
Home > Planning and Building Control Solutions.	0	Ford Bloggs for message stacked for message stacked for the set of the	3an 55, 3022 30-40:09 44
Error Server Problem A server problem prevented the webpage from displaying. Try again later to see if the problem has been corrected.			

There is also a **Comment** field. Click in the grey area to type your message and press **Enter** to post it



9.3 Notification of an Update

If you make an update on a request that is **On Hold**, either through the Customer Portal or by Email, the request's **Sub-Status** will be changed from **Awaiting Customer Response** to **Updated by Customer** The analyst is notified of the update by email and through the request logging system

Catalog Item	Planning	Catalog Item	Planning
Sub-Status	00 Awaiting Customer Response	Sub-Status	▷ Updated by Customer
Status	On Hold	Status	Open
Target Resolve By	13/07/2022 12:40	Target Resolve By	05/07/2022 16:53
Logged On	09/06/2022 15:28	Logged On	09/06/2022 15:28
Supported By	Mark Singleton	Supported By	Mark Singleton

This status is shown on the request's **Key Information** box at the top right of the request

9.4 Do's and Don'ts when Updating

It is important to bear in mind a few "rules of thumb" when updating Customer Portal requests by email:

- Please ensure appropriate Idox reference number (IDXIN00397719 in this case) is included in the Subject: line when sending emails to your primary business unit's Service Desk. This will ensure that the active request gets updated promptly and there is no risk of duplicating the request
- Ensure that you send emails reporting Idox issues to just **ONE Service Desk email address**. This will prevent duplicate requests being logged and avoid confusion and delays in responding to you
- Please do not send emails directly to your analyst without including your primary business unit's Service Desk address. This will ensure that the request gets updated despite the absence of your analyst for whatever reason and can be progressed by another member of the team
- Bear in mind that there is a **10mb limit** on the size of files that can be sent by Email (and **uploaded** on the Customer Portal). If you have large individual, or multiple files to send, please ask your analyst to provide details of the **Idox Dropoff Portal**
- If a request has been **closed please do not update it**, either by including the **IDX** number in your email or updating it on the **Customer Portal**. We **do not** re-open closed requests as the SLA timers would be inaccurate. If an update is received which is a recurrence of the original issue a new, linked request will be logged for it, enabling the analyst to view the closed request. If it is a **new** issue a **new** request will be logged and you will receive email notification in either case





10 Setting your Request to "Resolved"

There is currently **no option** for you to set your request to **Resolved** and close it yourself.

10.1 Advising the Request can be set to "Resolved"

If you are happy that the issue has been resolved, or that you have been provided with a suitable workaround pending a new software release, then please update the request as per section **9.1** to advise that it can be closed



10.2 Request Closure

The request will then be updated and your analyst will complete the closure process. The **Sub-Status** will display in **All My Requests** as **Pending Resolut**(ion) until closed by the analyst

		(Active	Impacted I	All My Requests	🕀 All My Se	rvices 🗸		
Total: 1						Active ✓	My Requests	~
Reference 🗘	Summary ©		Service 🗘	Catalog Item	Customer	Date Logged 🗸	Status 🕯	Sub-Status 🗘
IDXIN00401188	Test Request		Idox - Pu	Planning	Fred Bloggs	14/06/2022 17:31	Open	Pending Resolut

When viewing your request you will see the following statement on the Timeline once it has been closed

Timeline	~
③ Commenting in the timeline of this request has been disabled, as the request has been closed.	

10.3 Request Resolved Notification

You will receive an email notifying you of the request closure





11 Customer Communication

There are a couple of ways that Idox will communicate with you in addition to updates on your active requests. These will generally be service updates and availability information as well as product desupport notices and are via **Bulletins** and **Announcements**. Depending on the service, there may also be an Announcements tab available

11.1 Bulletins

These are shown at the top of your **homepage** and will scroll through on a loop

C https://customer.hombill.com/idoxsd/servicemanager/			P	A 6 0 3 4 @ 🛞
idox		My Documents	ty Services Profile Logout	
	1 LR	1 2	ALICE	📋 Idox - Document Management System
Idox is pleased to appounce the release of the DMS 5.1.2	MPORIANI Critical Upo	date DMS 5.1.2.3 Patc	h t immediately to your non-production te	st system prior to
20%		ronment, as soon as possible.	0000000	BRAN
Se	arch		٩	
	Impacted III My Req	uests		
@ :	B	🖓 🎤		
«Retired» Z Test Testing extended characters in Service source order in live app and port	Acolaid - Data Management Tool (IDMT) Acolaid Data Management Dool, the unform specific version of the Idox	AddressBase Premium data Advantage Substance Misuse Substance Misuse For organisations wanting to buy and share AddressBase Premium data. requests only. Relating to	Aligned Assets - Delivery For all maintenance tasks	

11.2 Announcements

These will show under your **Services** and will scroll through on a loop if there are more than one





Depending on the Service, there may also be an Announcements tab

	Interested/Affected
Release Announcement - Idox Viewer 10.4.6 – Annotate and Redact Upgrade	
Idox is pleased to announce the release of the Idox Viewer 10.4.6 – Annotate and Redact upgrade for Idox DMS version 5.1.x, which i installable.	s customer
The release resolves an issue with the copy and paste functionality.	
Idox recommend that you apply this to your non-production environment for testing, prior to applying to you production environment.	
The installer can be downloaded from the 'Idox – Document Management System' service on the Service Desk Customer Portal via the using the 'Download' option.	link below,
Idox – Document Management System	
Please refer to the "Idox_Viewer_10.4.6_InstallGuide.pdf" included in the release for the installation instructions.	
If you do not have access to the customer portal, you can contact the Service Desk on 03330 111 444 to request an account. Show Less	

Please note that the trailed **updates and patches** will usually be found under the **Download** section of individual services

 Download
 Request download of DMS Patches, OMT and Idox Apache Upgrades CAFM Explorer Download For downloading releases and patches. Please select your current version from the link and download

11.3 Known Issues/FAQ's

Again depending	Make a Request I Requests FAQs Documents	
on the Service there may be a	Filter Q How do I change/reset my CAEM password?	~
FAQ's tab available	What is the latest version of CAFM?	~
	How can I upgrade to the latest version?	~
	How do I amend the Email templates?	~
	How do I close a PPM Schedule?	~
	How do I hide a PPM?	~
	How do I log into CAFM Explorer with Windows Authentication?	~
	Some fields are greyed out in CAFM, why is this?	~
	Emails are not being received.	~
	How do I log into CAFM Web with Windows Authentication?	~
	I assigned a WO to a Trade Person, but they cannot see this WO in My Jobs when they log into CAFM Web, how can I make this WO visible?	~
	The "My Work Orders" section does not show all WOs that this Helpdesk User has logged, how can I make them all visible?	~

ዲ



12 Finding Documents & Downloads

12.1 Finding Documents

Log onto your Customer Portal account: URL: https://customer.hornbill.com/idoxsd/



Enter your credentials as follows:	Log in to
Login ID: Your email address	Login Id
Password: Enter your secure password	Password
Please click on "FORGOT PASSWORD" to set secure password	FORGOT PASSWORD LOG IN a

This must be at least 6 characters and contain numbers, letters and a special character such as "!" - it cannot be a password that has previously been used





From your "Home" page use the "Search" bar to find the product you require documentation for

Then click on the Q symbol and a list of products will be displayed. Click on the required service, shown under the **G** Services heading

idox	My Documents	My Services	Profile	Logout
onsite		⊗ Q		
'onsite' returned 29 Results		All	Services FAQ	s Catalogs
(2) Services			1	6 Results
Onsite - Building Inspector				
Onsite - Service Requests				
Onsite - Commercial Premises				
Onsite - Planning				
Onsite - Planning Enforcement			Shov	/ More >
E FAQs				7 Results
Idox OnSite Service Requests App				
Where can I find the What's New Guide for generation 2 of the Onsite Building Inspector App?				
What do I need to do in advance of previewing the next generation Onsite apps in Staging?				
Where can I find the What's New Guide for generation 2 of the Onsite Commercial Premises App?				
Where can I find the What's New Guide for generation 2 of the Onsite Planning App?			Shov	/ More >
() Catalogs			I	6 Results
Onsite - Building Inspector Onsite - Building Inspector				
Onsite - Service Requests Onsite - Service Requests				
Onsite - Commercial Premises				



Then click on the "Documents" tab

nbill.com/idoxsd/servicemanager/service/384/catalogs/					2
idox	My Documents	My Services	Profile	Logout	
. Home / My Services / Onsite - Service Requests					
Onsite - Service Requests				Ψ	
Service Request Next Generation of Onsite Apps - Prerequisites Please use the link below; https://www.smirtsurvey.co.uk/s/idox_mobile_ap	Questionnaire		~		
Make a Request FAQs Documents					

The available documents for that service will be listed

idox		My Documents	My Services	Profile	Logo
③ Make a Request FAQ	Documents				
Filter documents by title/description					
Previewing Mobile Apps - G	Google (Android)				
Previewing Mobile Apps - M	licrosoft (Windows)				
Previewing Mobile Apps - A	upple (iOS)				
What's New in OnSite Servi	ice Request 2.1				
Next Generation Onsite App	ps - Release Annoucement				
Onsite Next Generation pre	e-reqs - The details in the online questionnaire for refer	ence			
Release Version Onsite App and Task Versions & Open					
OnSite Service Request Use	er Guide 2.3				



Click on description of the document will display in a new tab



This PDF document can then be saved in the usual way by clicking on the "Save" symbol on the taskbar at the top of the document





12.2 Alternative Method

Documents can also be located by using the "Services" icons on the "Home" page Scroll down the page until you find the required "Service", then click on it



Click on the appropriate tab to access the content or on the panels for the options described

idox	My Documents My Services Profile L
Home / My Services / Uniform - Client, Up Uniform - Client, Upgrades & Uniface Licensi Uniform Clients, Upgrades (including Service Packs and Patches) and Un Licensing.	ing 🛛 🖉 🖉 Avail
IMPORTANT UPDATE Loc We stated in our initial update that the Oracle database at the ne case. Oracle have stated that bett Oracle database at the two Oracle components not used by idex Uniform for dept Please see FAQ atticle "Further or Please see FAQ atticle "Further or Make a Request	g43 Vulnerability CVE-2021-44228 e core of the Jakes Uniform solution was not succeptible to this and this is still chert are undiffectify this issue. It has however area been plaetified that oped with the Oracle Database have been flagged as vulnerable by Oracle. pdate for Oracle in relation to CVE-2021-44228
Uniform - Upgrades, Service Packs and Patches Uniform - Upgrades, Service Packs and Patches	Uniface DLM Licensing Uniface (formerly Computer) Distributed License Manager (DLM) issues.
	Download - Upgrades and Service Packs
Download - Snapshot Tool and training Databa. Download Uniform Snapshot Tool and customer installable Uniform Training Database.	Downloading of Uniform Upgrades and Service Packs, including associated Uniface Distributed License Manager.



12.3 Finding Software Downloads

Log into your Customer Portal account as above, and on the "Search" bar enter your search parameter, here

idox	My Documents	My Services	Profile	Logout
unimap 10.5.1		© Q		
unimap 10.5.1' returned 7 Results		All S	ervices Catalo	gs Requests
Services				2 Results
Uniform - Unimap, Spatial, SMRT Unimap Desktop issues and licenses, Spatial Constraints and Spatial Migration & Registration Tool (SMRT)				
Unimap Desktop Licensing Requests For requesting Licenses ArcEngine and its Extensions for UniMap Desktop				
() Catalogs				3 Results
ArcEngine ArcEngine - used in Unimap				
Download Request download of Unimap Desktop, SMRT and ESRI License Manger.				
Unimap Desktop Issue with the installation and use of UniMap Desktop.				
<u>∧</u> Requests				2 Results
IDXSR00379034 - Download Request - Previous - Unimap 10.5.1 - Unimap 10.5.1 Download Request				Closed
Current or Previouse release - Previous - Unimap 10.5.1				
File Requests - Unimap 10.5.1				

Under the **Oservices** heading click on "Uniform - Unimap, Spatial, SMRT" and you will be presented with the following screen

idox	My Docu	ments My Service	s Profile	Logout
Home / My Services / Uniform - Unimap, Spatial, SMRT Uniform - Unimap, Spatial, SMRT Unimap Desktop issues and licenses, Spatial Constraints and Spatial Migration & Registration -	Tool (SMRT)			¥
① Make a Request				
GMS Constraints Module - Spatial issues	Unimap Desktop Issue with the installation and	use of UniMap Desktoj).	
Spatial Migration and Registration Tool Spatial Migration and Registration (SMR) Tool used for converting to Oracle SDO inline geometry format and update Show More	Download Request download of Unimap D Manger.	esktop, SMRT and ES	RI License	>
Request GeoDataBase Extension License ArcEngine GDB Extension license is required for Spatial Migration and Registration Tool (SMRT) and Uniform Snapshot				
Show More				

Click on "Download"



You will then be shown a list of available software. Click on the option "Previous - Unimap 10.5.1"

idox	My Documents My Services Profile Logout
Home / My Services / Uniform - Unimap, Spatial, SMRT / Downlo	ad / Log Request
• Cancel	
Current or Previous Releases? Current - Unimap 10.6.1 Previous - Unimap 10.5.1 Spatial Migration and Registration Tool (SMRT) Utilities - ESRI License Manager and Patch Finder	Uniform - Unimap, Spatial, SMRT Download
Clicking on the radio button will then present you with the following option	Current or Previous Releases? O Current - Unimap 10.6.1 Previous - Unimap 10.5.1 Spatial Migration and Registration Tool (SMRT) Utilities - ESRI License Manager and Patch Finder
Click on the required item	Please select an item below: O Unimap 10.5.1
Then click on "Finish"	Finish
	idox Ny Decuments Ny Services Profile Logout
The Customer Portal will then create a Service Request and email you from it	Hone / My Services / Uniform - Unimas, Speala, SHRT / 120:030279034 IDXSR00379034 Post Somathing Name. Details Summary Description
	Question Image: Control of the second of

Once the email is received, click on "Open"



ServiceDesk - NoReply shared "Unimap_1	0.5.1" with you.
ServiceDesk - NoReply <servicedesk@myide< th=""><th>ax.idoxgroup.com></th></servicedesk@myide<>	ax.idoxgroup.com>
(i) If there are problems with how this message is displayed, click h	ere to view it in a web browser.
	ServiceDesk - NoReply shared a file with you
	Idox Service Desk File Download reference IDXSR00379034
	(R) This link only works for the direct recipients of this message.
	Microsoft Privacy Statement

Your download will be then available in a .zip file

🖻 Share 🐵 Copy link 🛓 Download	Copy	y to	10 10 1		
					5
	Unir	nap_10.5.1.zip			
		Name	Date Modified	File Size	
		Unimap 10.5.1 Installation Guide.pdf	2019-12-13	242 KB	
		Unimap 10.5.1.exe	2019-12-13	803 MB	
		Unimap 10.5.1.msi	2019-12-13	3.73 MB	
		Unimap 10.5.1.pdf	2019-12-02	149 KB	
		Unimap License Manager Installation G	2019-12-12	1.03 MB	



You then have the option to "Share", "Copy link", "Download" or "Copy to" – chose which action is required and then close the tab in your browser

If you don't retrieve the file(s) immediately, you will be asked by Microsoft to verify your identity This is only required on first use and is not requested for subsequent downloads

		Microsoft	
		Verify Your Identity	
		You've received a secure link to:	
		Unimap_10.5.1.zip	
		To open this secure link, we'll need you to enter the email that this item was shared to.	
		Enter email	
Enter your email address	and click on "Next"	Next	
You will then be emailed a verification code		By clicking Next you allow Idox Software Ltd to use your email address in accordance with their privacy statement. Idox Software Ltd has not provided links to their terms for you to review.	
		© 2017 Microsoft Privacy & Cookies	
	04522043 is your Microsoft OneDrive veri	fication code.	
	SharePoint Online <no-reply@sharepointor To • Mark Singleton</no-reply@sharepointor 	line.com>	
		OneDrive	
Enter the code into dialogue box and click on "Verify		Hello. For security purposes, you must enter the code below to verify your account to access Unimap_10.5.1.zip. The code will only work for 15 minutes and if you request a new code, this code will stop working.	the
		Od522043 Having problems with the code? View the error and make sure that the email identifier is "K3S40NC". If it's not, look for an updated email or try requesting a new code.	then
		● 2017 Microsoft Privacy & Cookies	

As shown above, you then have the option to "Share", "Copy link", "Download" or "Copy to" – chose which action is required and then close the tab in your browser





13 Feedback

Most of our services will allow you to provide feedback on your requests for a period of time (normally 30 days) after the request has been closed.

This can take the form of a simple star rating dialogue box which will pop up if you have the request open when the Request Resolved Notification email is sent and also whenever you open the request, until it is completed, or you click the No Thanks box at the bottom left		Customer Feedback				
		Please rate the customer service you received from the analysts that dealt with this request. Low 公 公 公 公 公 公 公 High Is there anything you'd like to add? Please be 100% honest, all feedback is helpful.				
Give us your feedback!						

Clicking on this will display the **Customer Feedback** dialogue box, as shown above, again for you to complete. If you click on **No Thanks**, the dialogue box and **Give us your feedback button** will disappear

If you click on the All My Requests button, all open			Impacted	E All My Requests 🕀 All I	My Services	$\overline{}$		
requests will be displayed. In this case there are no open requests	Total: 0 Reference =	Summary ‡		Service Catalog Item	Customer 🗘	Active	My Requests Status \$	✓ Sub-Status ≎
	There are no req	uests						

Your feedback is important to us, and as part of Idox's ongoing customer service commitment it is important for us to understand your experience of dealing with the Idox Service Desk.

If we are doing something well, we want to build on that. If there is an area where we could do better, we want to learn from your experience and improve how we deliver our services

request





14 Contact Us

14.1 Primary Business Unit Contact Details

If you **do not** have an existing **Login ID and Password**, please contact your **primary business unit's Service Desk** via their normal telephone number or email contact address:

- Local Government, CAFM and Elections servicedesk@idoxgroup.com 03330 111 444
- Idox Cloud (Tascomi) cloud.servicedesk@idoxgroup.com 03330 111 555
- Digital Services servicedesk@idoxds.com 03330 111 677
- Social Care openobjects.servicedesk@idoxgroup.com 03330 111 668
- EIM OPIDIS (Engineering) support-opidis@idoxgroup.com & EIM Fusion Live - supportfl@idoxgroup.com
- Transport transport.servicedesk@idoxgroup.com 03301 243 470/04433 01243 470
- Health (including Lillie) health.servicedesk@idoxgroup.com 03301 245 555

14.2 Worldwide Office Contact Information

Idox plc registered in England & Wales on 26 April 2000, **No:** 3984070. Registered Address: Unit 5, Woking 8, Forsyth Road, Woking, Surrey, United Kingdom, GU21 5SB.

Main Switchboard: 0333 011 1200

Please refer to the following link for other Idox Offices: https://www.idoxgroup.com/contact-us/