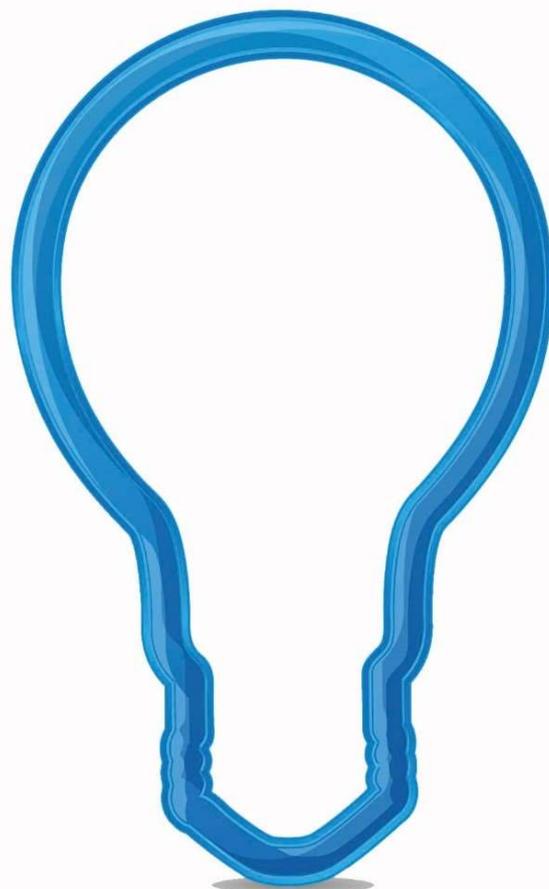


Service Desk Customer Portal

Customer Portal Reference Guide



Date: 12/10/2023

Author: Idox Service Desk

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Commercial in confidence

Document control

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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/idxsd>

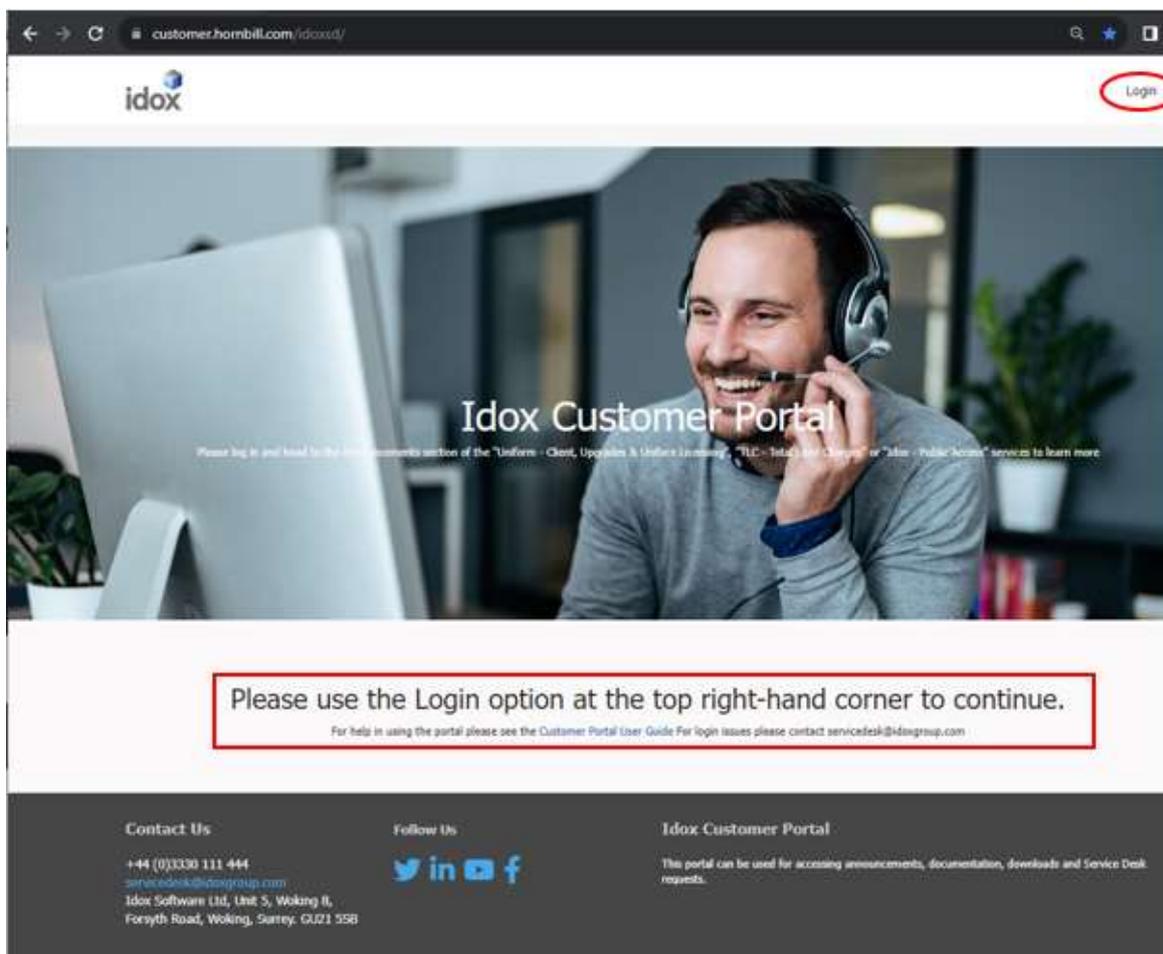
You can also access the Customer Portal using direct links from emails. Direct links are included in emails sent from Service Desk, both within the body of an email as well as in the footer

Hi nnnnn

RE: [IDXIN00123456 click here to view/update](#) - 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.

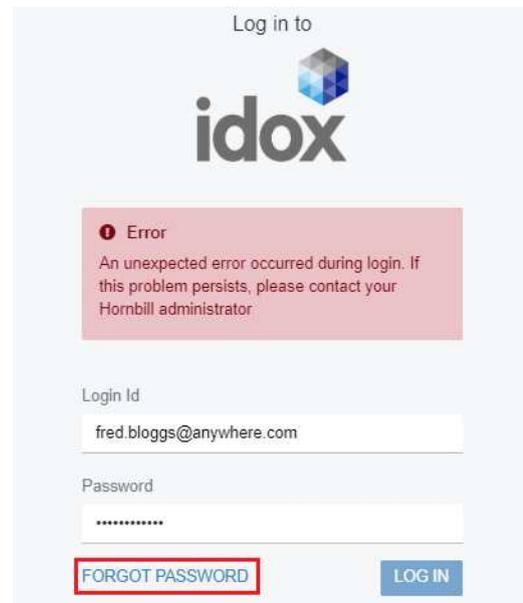
You will also need to follow the **Setting a New Password** process to enable you to access your new Customer Portal account

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

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



Log in to
idox

Error
An unexpected error occurred during login. If this problem persists, please contact your Hornbill administrator

Login Id
fred.bloggs@anywhere.com

Password
.....

FORGOT PASSWORD **LOG IN**

Click on the **Submit** button



Reset Password
idox

Login Id
fred.bloggs@anywhere.com

BACK TO LOG IN **SUBMIT**

Then on **Back to Login**



Reset Password
idox

BACK TO LOG IN

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:

Enter an new **secure** password and then click on **Submit**
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

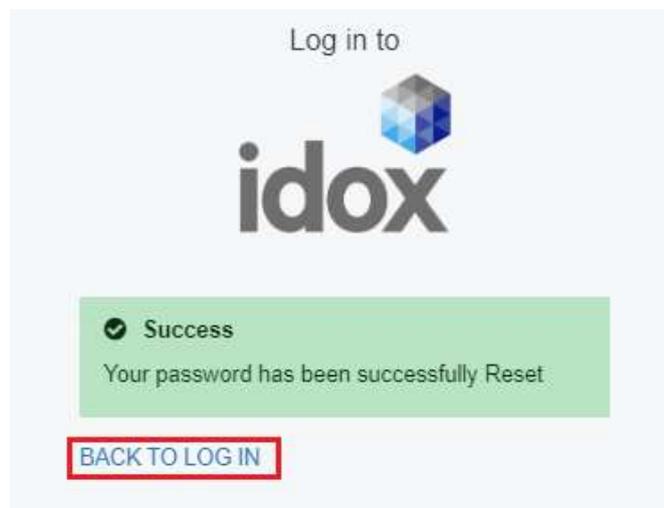


The screenshot shows a light blue dialog box titled "Log in to" with the idox logo. Below the logo is a text box containing "Change password for fred.bloggs@anywhere.com". There are two password input fields: "New Password" and "Retype Password", both containing masked characters. At the bottom, there are two buttons: "BACK TO LOG IN" and "SUBMIT". The "SUBMIT" button is highlighted with a red rectangular border.

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

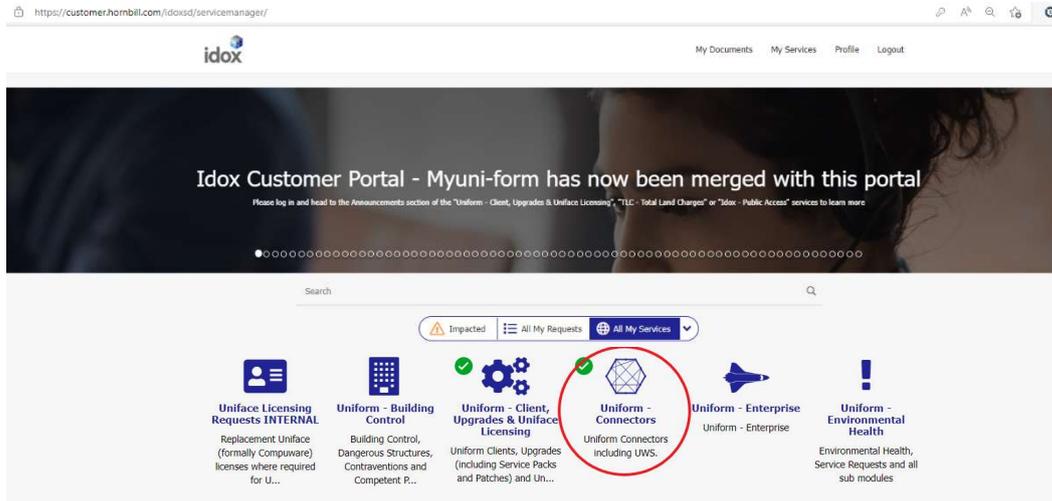


The screenshot shows a light blue dialog box titled "Log in to" with the idox logo. Below the logo is a green success message box containing a checkmark icon, the word "Success", and the text "Your password has been successfully Reset". At the bottom, there is a button labeled "BACK TO LOG IN", which is highlighted with a red rectangular border.

5 Using the Customer Portal

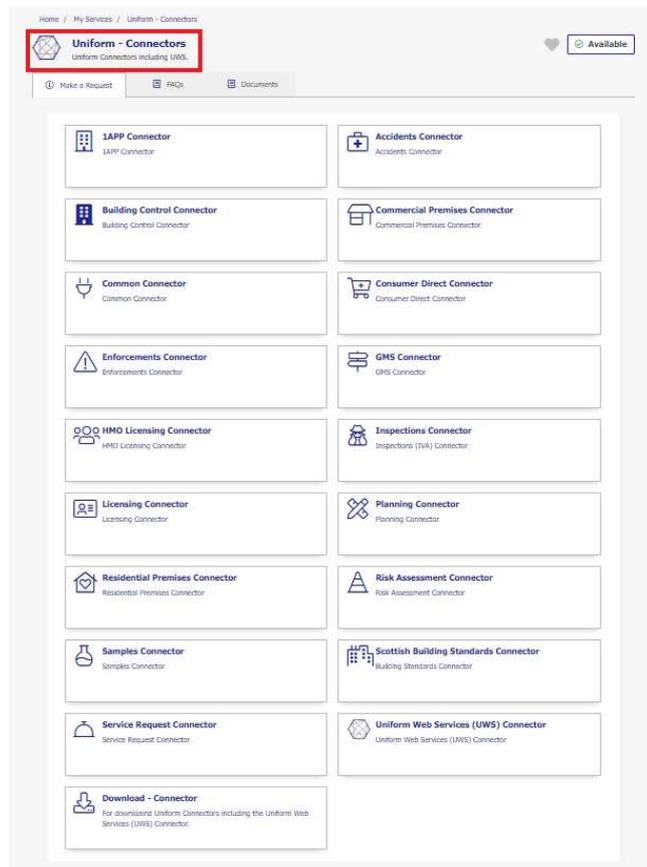
5.1 All My Services

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



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

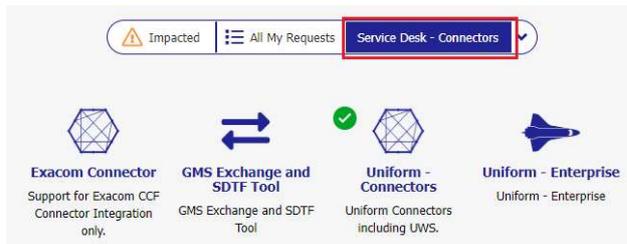
Click on **Home** located at the top left of the screen to return to **Home** screen



You can also click on the of **All My Services** which will show the list of the Services your organisation is subscribed to



Clicking on a Service will take you to that page within the Portal

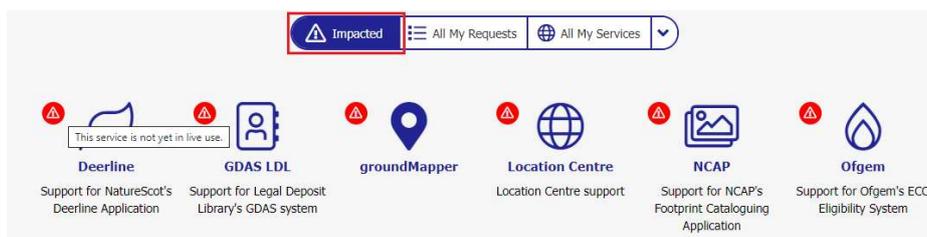


Clicking on an icon will then take you to that service's page



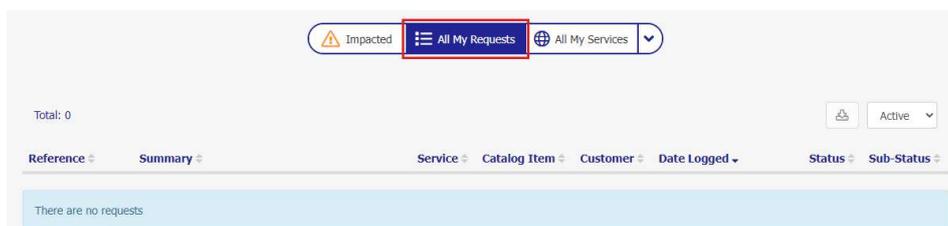
5.2 Impacted Services

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



5.3 All My Requests

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



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

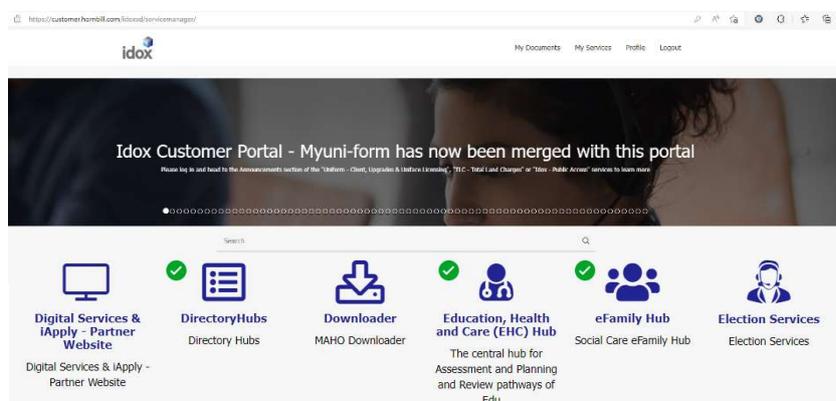
6.3 Listing Multiple Issues

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

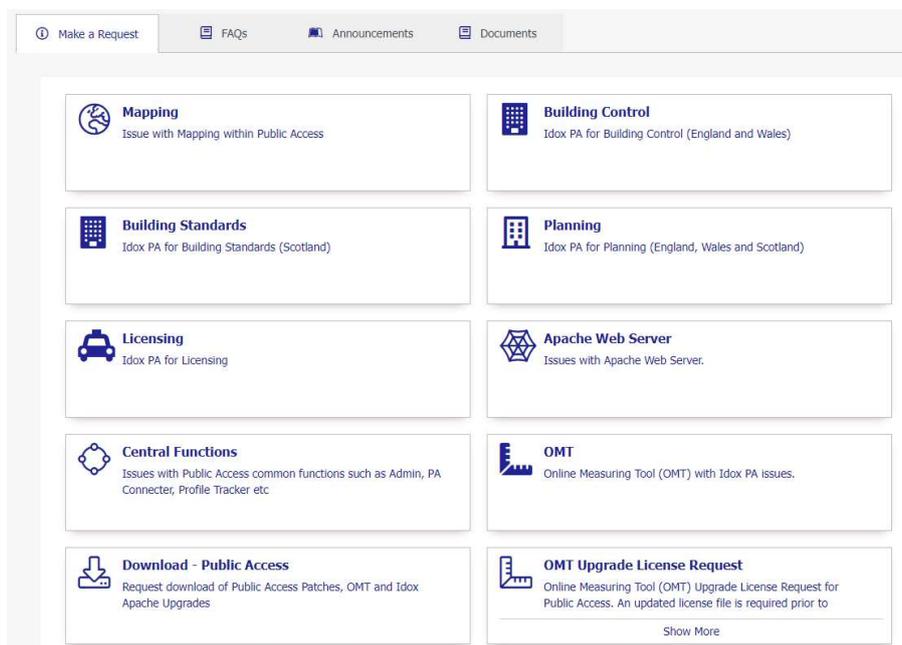
Once logged into your Customer Portal account, you will be presented with the services that you are subscribed to on the **Home** page



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

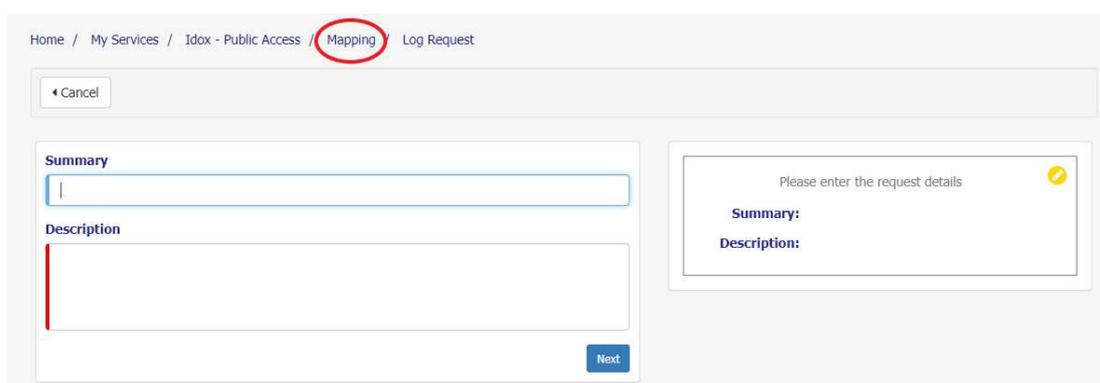


You are presented with a number of tabs depending on the service, click on the **Make a Request** tab. This tab shows the list of **Public Access** modules for which you can log a request



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



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.

Home / My Services / Idox - Public Access / Mapping / Log Request

Cancel

99 2 7

Summary

Search not

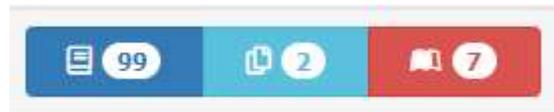
Description

Next

Summary: Search not

Description:

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



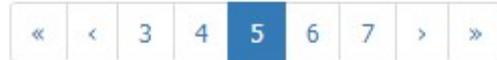
Knowledge Centre BETA

FAQs 99 Catalogs 2 Announcements 7

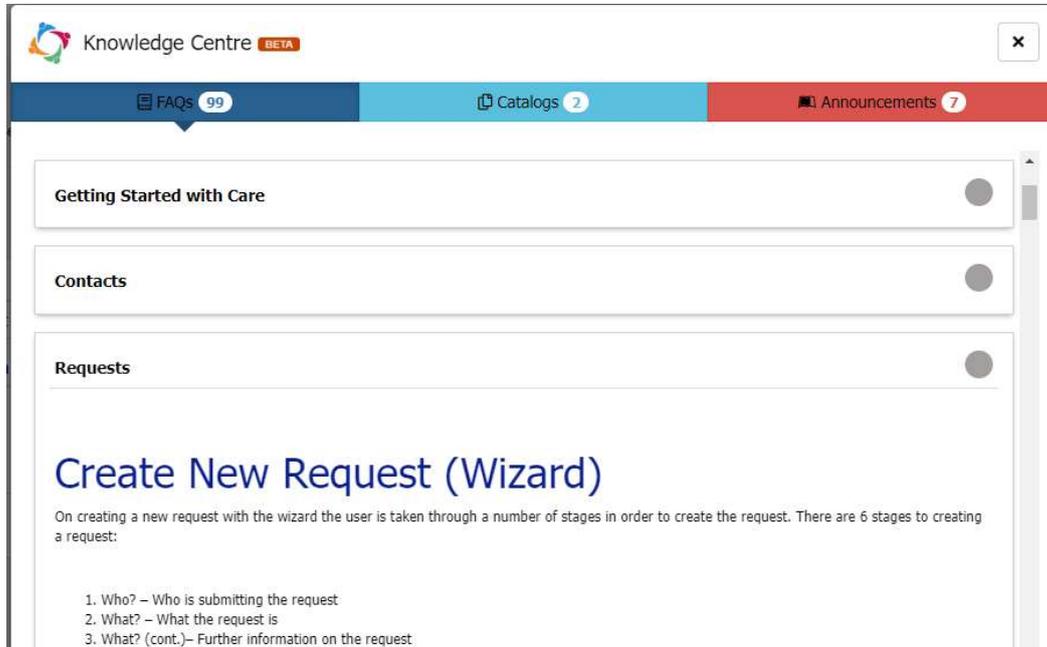
- Eros - Canvass communications - Example CSV files
- Building Control - Getting Started
- Inspections Guide
- Premise Guide
- Initiatives Guide
- Private Tenancy Guide
- Management Information Guide
- Getting Started with Environmental Health
- Service Requests Guide

« 1 2 3 4 5 »

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:



6.7 Completing the Summary and Description Sections

When populating the **Summary** and **Description** fields it is important to give accurate and relevant information as this will help your analyst to investigate the issue more efficiently

Please provide as much information as possible, including steps to replicate the issue

When attaching screenshots or files to the request, please ensure that all personal information has been **removed** or **redacted**, and that a **full screen** screenshot of the error is provided

Summary

Member of public having difficulty registering on Public Access

Description

Can I please log a call for a member of the public who is having difficulty registering on our Public Access site.

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, they get the following error:

[Graphical user interface, application Description automatically generated]

They have tried to re-register, but when they do they get this error:


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.

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).

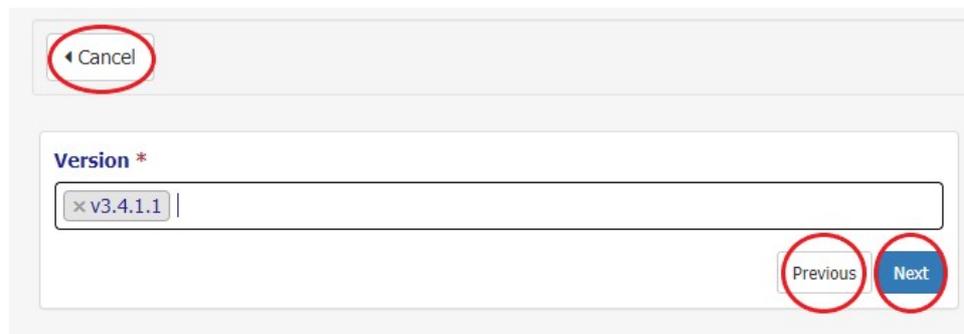
Next

Click on the  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



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 to **Previous** and **Next** screens, as well as to **Cancel** the request



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.

IDX**IN**00nnnnnn is for an Incident, used for software or system faults

IDX**SR**00nnnnnn is for a Service Request, used if you are asking for a new Customer Portal account(s) or requesting pointers to documentation etc

IDX**CR**00nnnnnn is for Change Requests, often for Hosted customers

6.8 Setting your Request's Priority

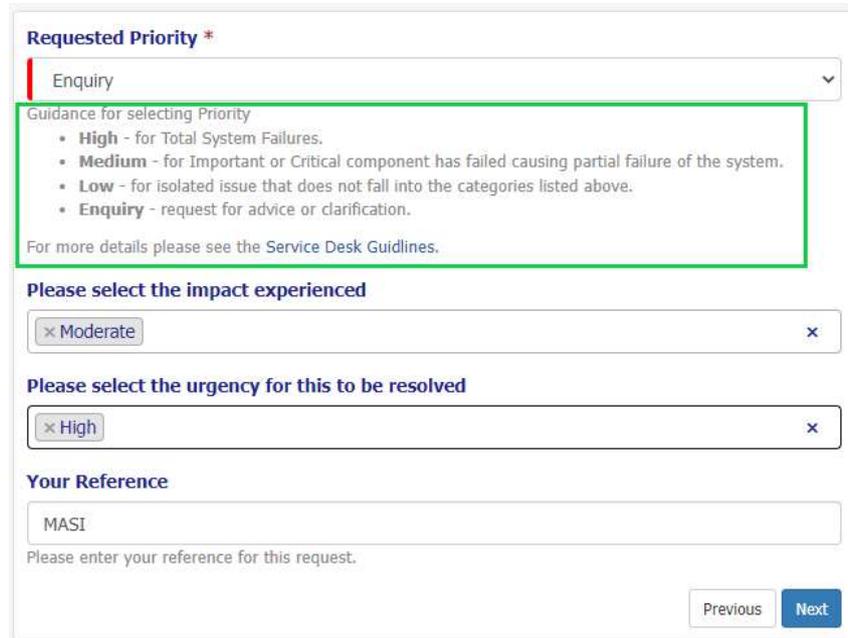
A particularly important screen is setting the **Requested Priority** of your request. There is guidance on the form detailing the issues the Priorities relate to and different businesses have their own set of Priorities to select from. The Default priority is **Enquiry**

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 2nd 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**



Requested Priority *

Enquiry

Guidance for selecting Priority

- **High** - for Total System Failures.
- **Medium** - for Important or Critical component has failed causing partial failure of the system.
- **Low** - for isolated issue that does not fall into the categories listed above.
- **Enquiry** - request for advice or clarification.

For more details please see the Service Desk Guidelines.

Please select the impact experienced

× Moderate ×

Please select the urgency for this to be resolved

× High ×

Your Reference

MASI

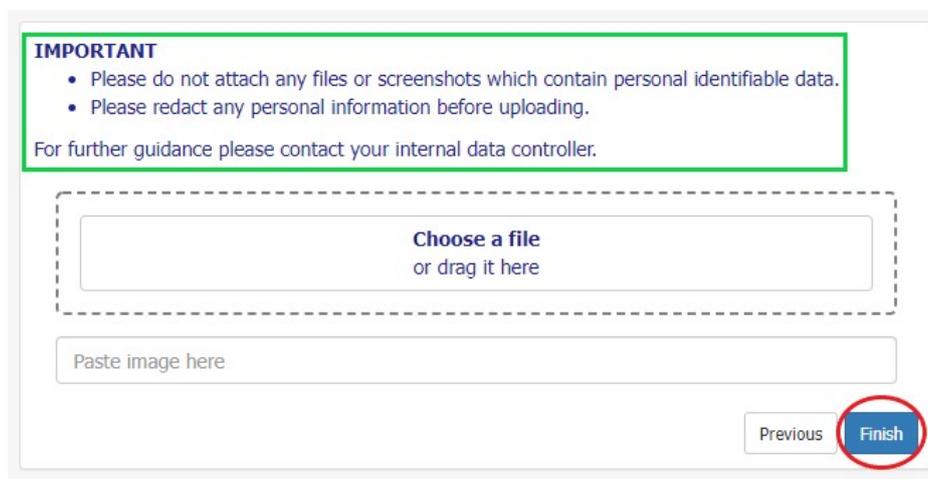
Please enter your reference for this request.

Previous Next

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



IMPORTANT

- Please do not attach any files or screenshots which contain personal identifiable data.
- Please redact any personal information before uploading.

For further guidance please contact your internal data controller.

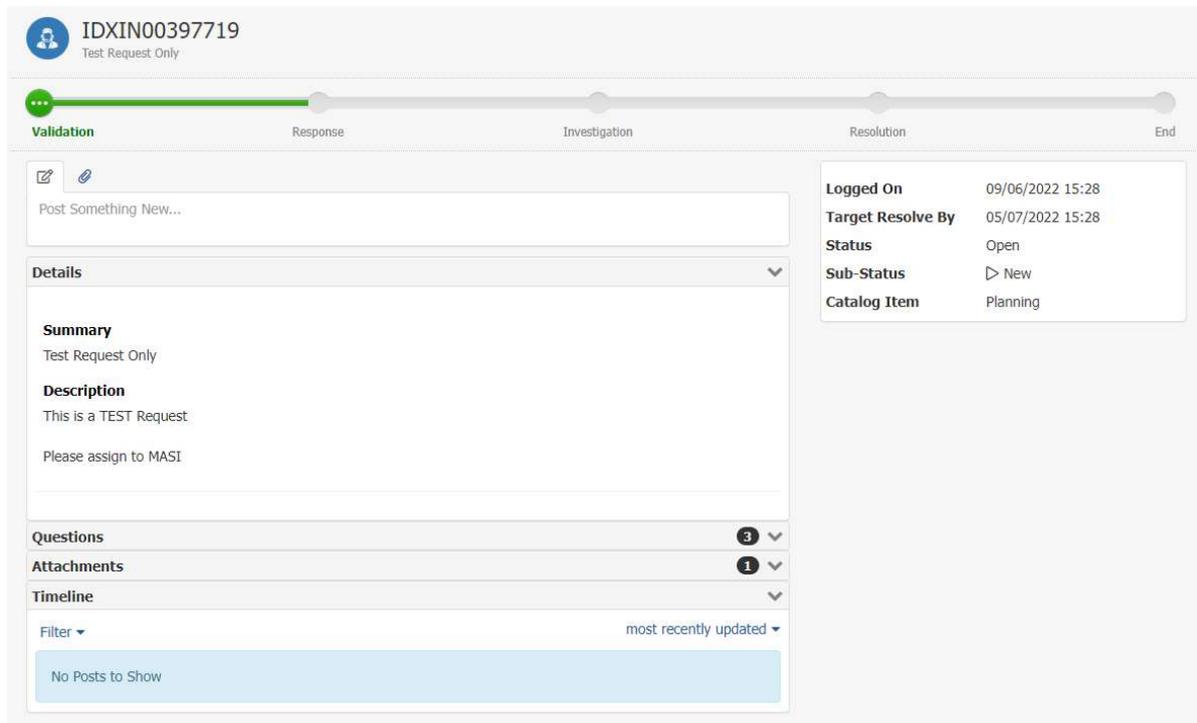
Choose a file
or drag it here

Paste image here

Previous Finish

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



IDXIN00397719
Test Request Only

Validation Response Investigation Resolution End

Post Something New...

Details

Summary
Test Request Only

Description
This is a TEST Request
Please assign to MASI

Questions 3

Attachments 1

Timeline

Filter most recently updated

No Posts to Show

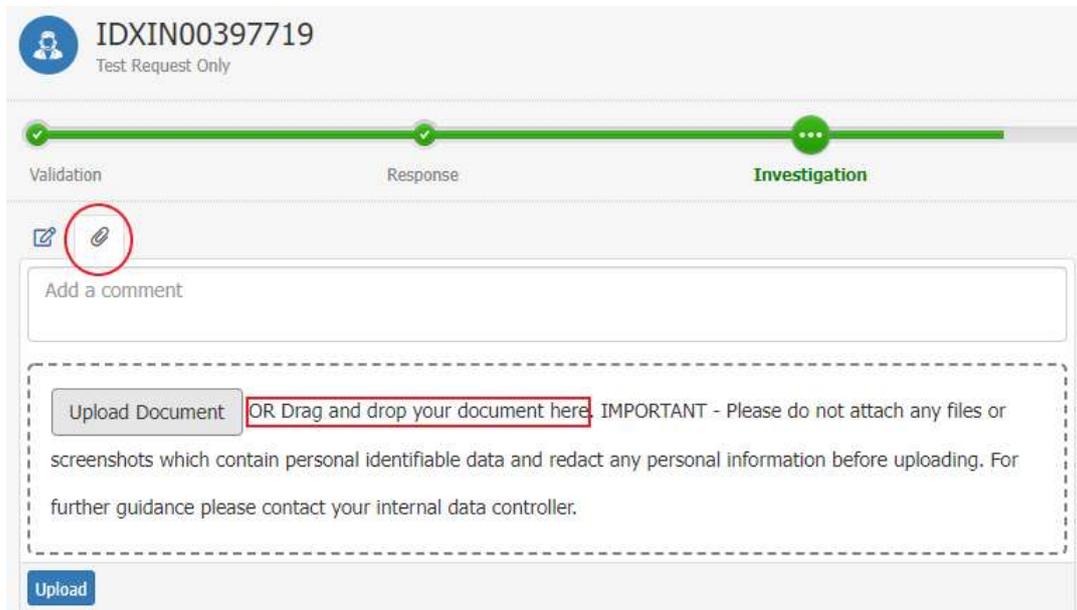
Metadata:
 Logged On: 09/06/2022 15:28
 Target Resolve By: 05/07/2022 15:28
 Status: Open
 Sub-Status: New
 Catalog Item: Planning

Your request will then be automatically assigned to a 1st Tier analyst for **validation** and then be assigned to a 2nd 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**.



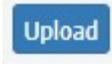
IDXIN00397719
 Test Request Only

Validation Response **Investigation**

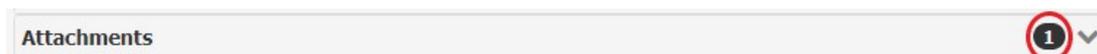
Add a comment

Upload Document **OR Drag and drop your document here** IMPORTANT - Please do not attach any files or screenshots which contain personal identifiable data and redact any personal information before uploading. For further guidance please contact your internal data controller.

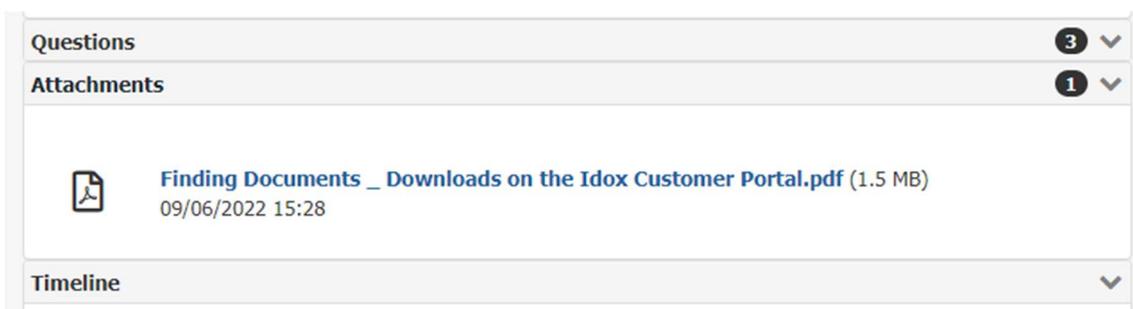
Upload

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

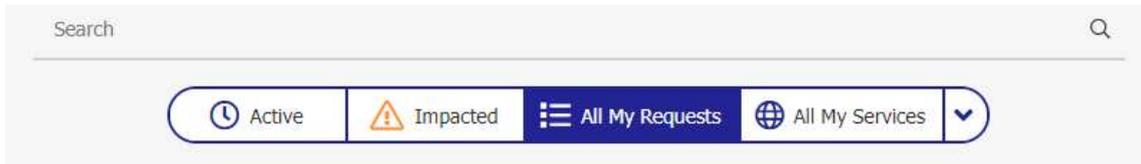


Questions 3 ▾
 Attachments 1 ▾
 Finding Documents _ Downloads on the Idox Customer Portal.pdf (1.5 MB)
 09/06/2022 15:28
 Timeline ▾

7 Viewing Support Requests

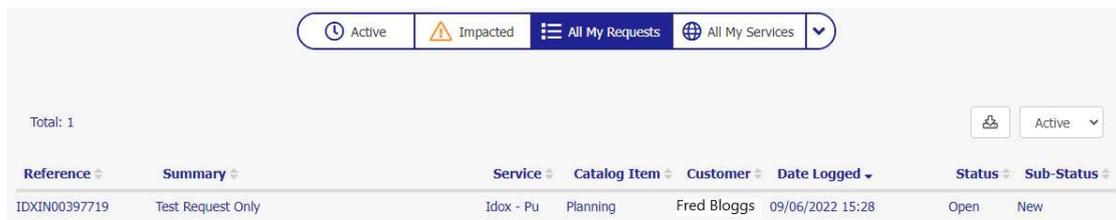
7.1 Viewing Methods

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



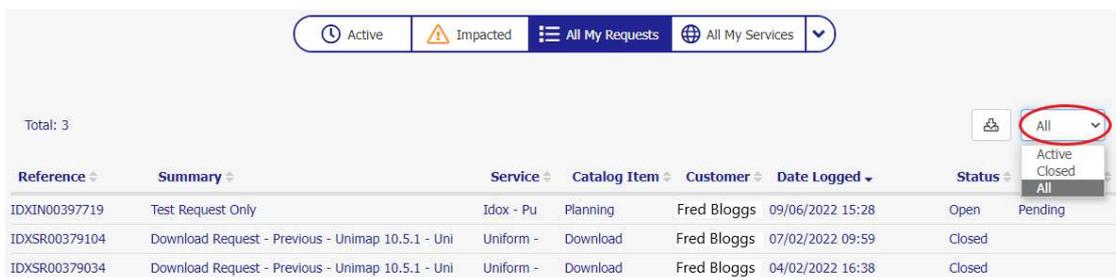
7.2 All My Requests

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



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



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	Pending
IDXSR00379104	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 Bloggs	04/02/2022 16:38	Closed	

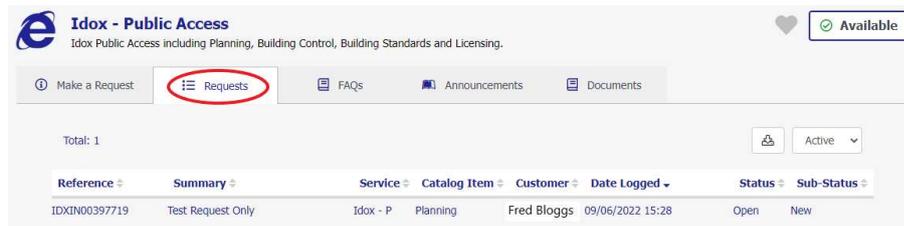
7.3 Active

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

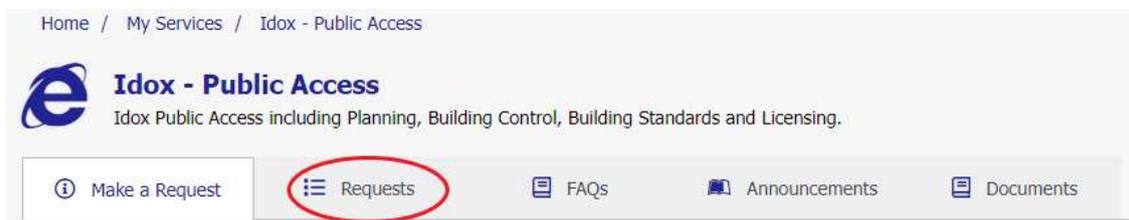


7.4 All My Services

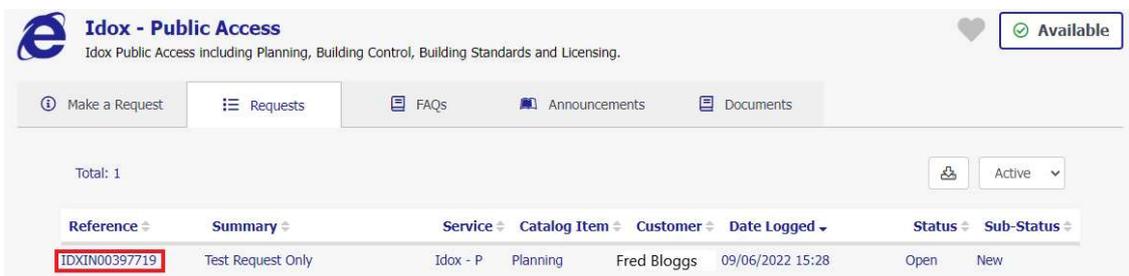
Click on the **All My Services** button where the icon for your services shows whether there is a support request active for it



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



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



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

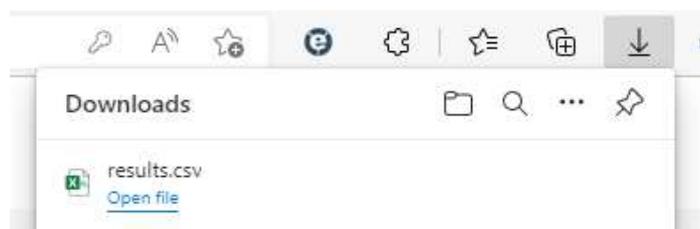
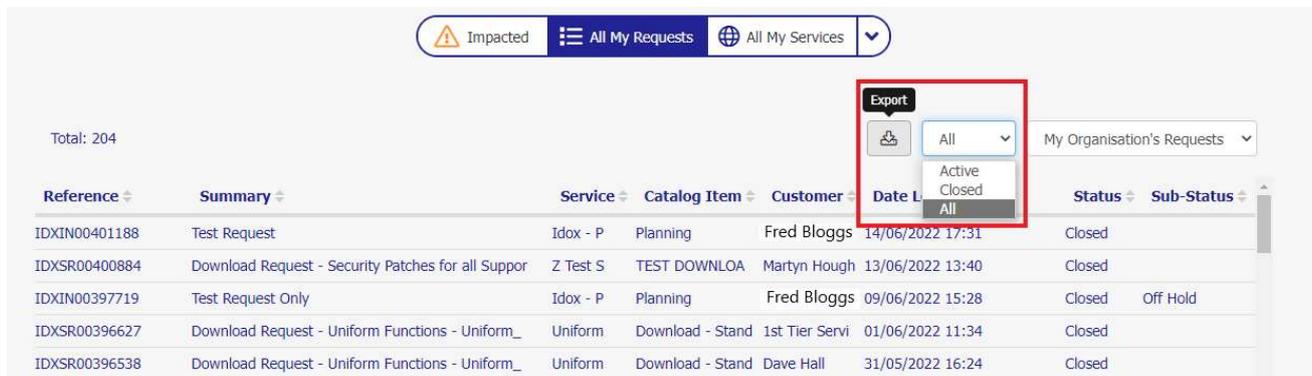
Once the permissions have been added, you will be able to click on the **All My Requests** button, then from the dropdown on the right side select **My Organisation's Requests**.

This will enable you to view and comment on all of your colleagues requests



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

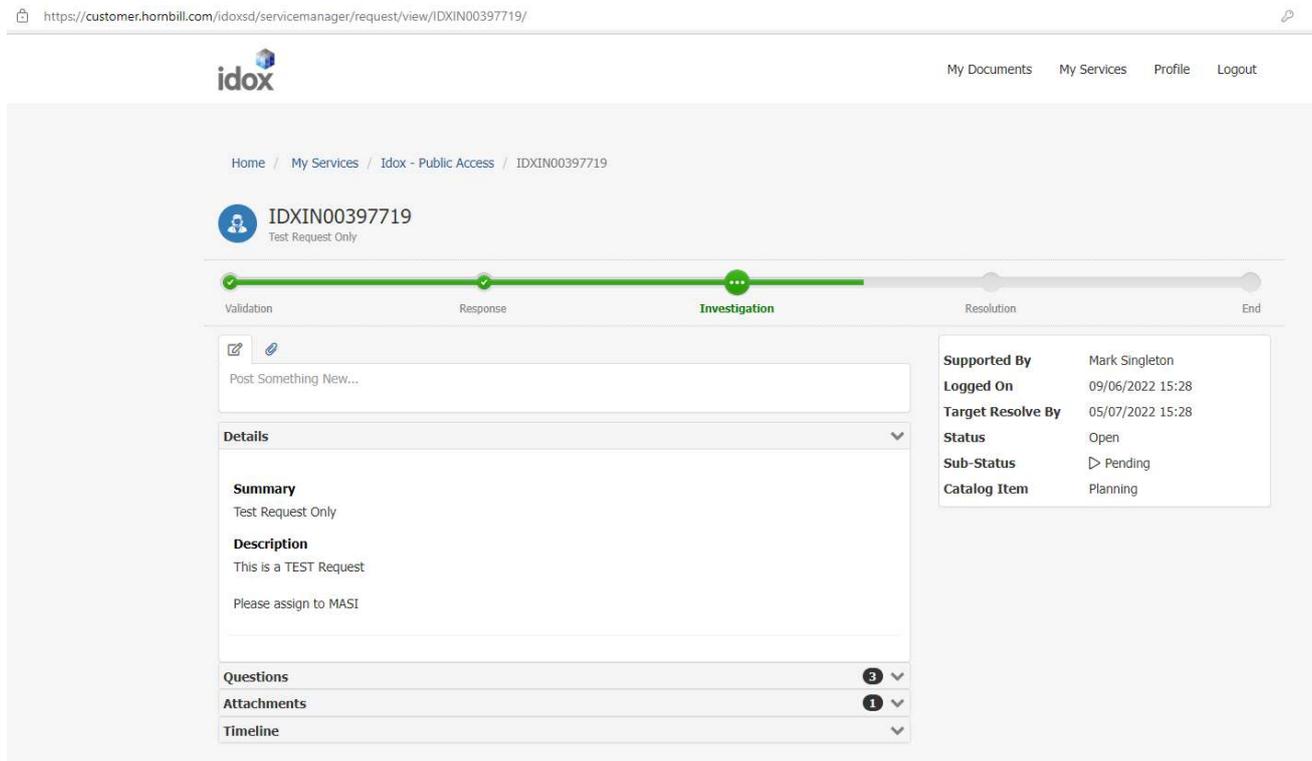


The **Export** button allows you to download a .csv file of your requests

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

https://customer.hornbill.com/idoxsd/servicemanager/request/view/IDXIN00397719/



Home / My Services / Idox - Public Access / IDXIN00397719

IDXIN00397719
Test Request Only

Validation Response **Investigation** Resolution End

Post Something New...

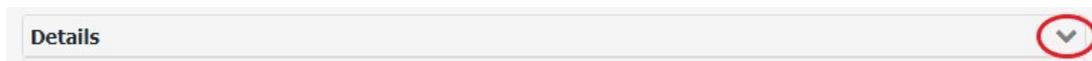
Supported By Mark Singleton
Logged On 09/06/2022 15:28
Target Resolve By 05/07/2022 15:28
Status Open
Sub-Status Pending
Catalog Item Planning

Details (expanded)
Summary
Test Request Only
Description
This is a TEST Request
Please assign to MASI

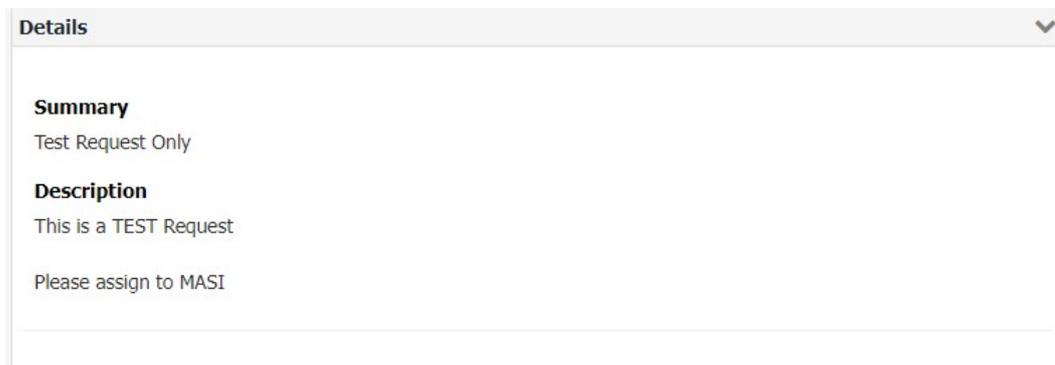
Questions 3
Attachments 1
Timeline

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



Expanded



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



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



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	⏸ 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 3 ▾

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

Attachments 1 ▾



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.

Timeline ▾

Filter ▾
most recently posted ▾

F

Fred Bloggs

Please see the attached screenshot

Jun 13, 2022 11:48:04 AM


 Update

Comment...

F

Fred Bloggs

File(s) attached:
Capture.PNG

Jun 13, 2022 11:47:56 AM


 Attach

Comment...

© Idox
27

Commercial in confidence

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.

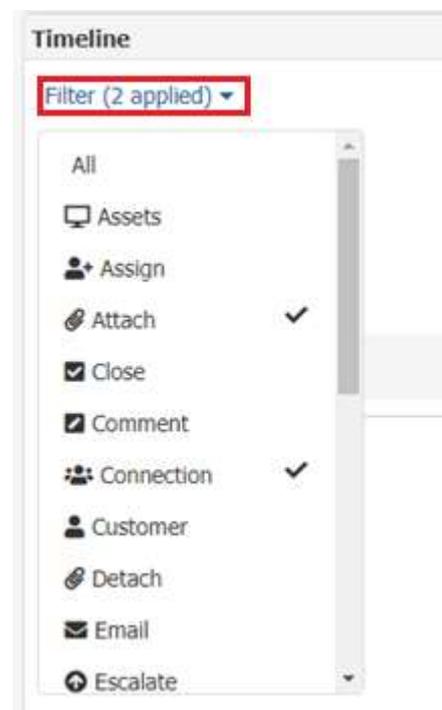
The recommended setting is **most recently updated**. Also within this section you have the ability to **Filter** the timeline entries by type



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

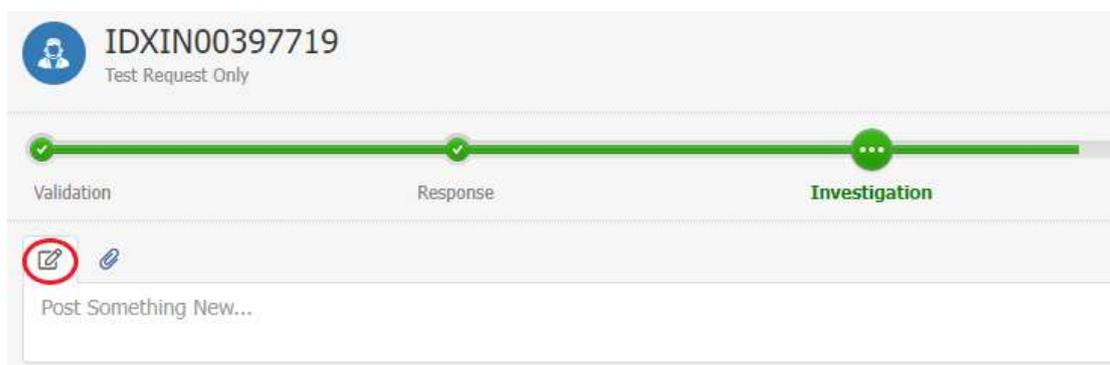
Once you have opened the required request you are able to update it with a message and add attachments should you need to. Please remember to remove any personally identifiable information from attachments or ensure it is properly redacted

9.1 Adding a Textual Update

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

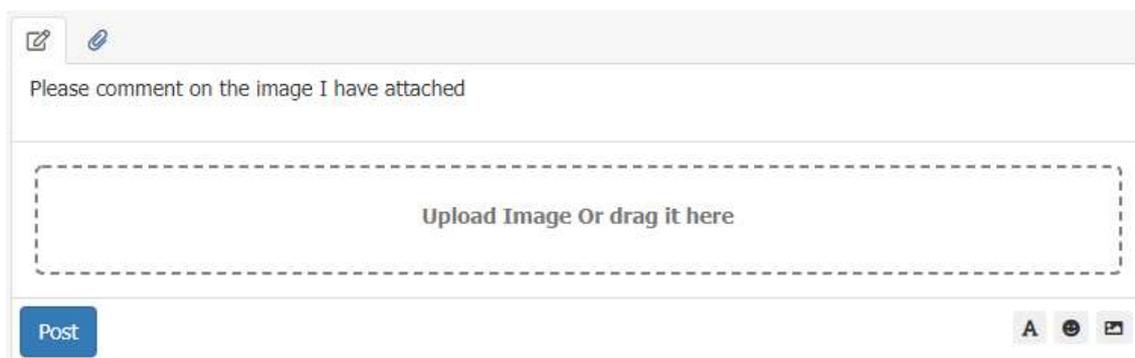
Just click in the **Post Something New** area to enter your update/request. You can also **add attachments**

by clicking on  as described in section [6.8](#)



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

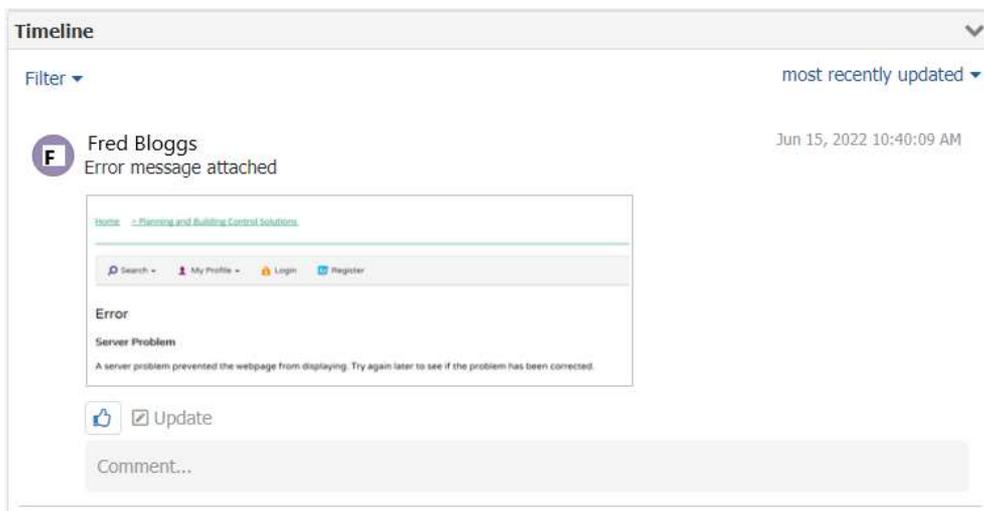


NB: The option to **drag and drop** a file, will be dependent on your browser support and your local security settings. If this option does not work, please use the **Upload Image** button and contact your **local IT** Support provider for assistance with your browser configuration

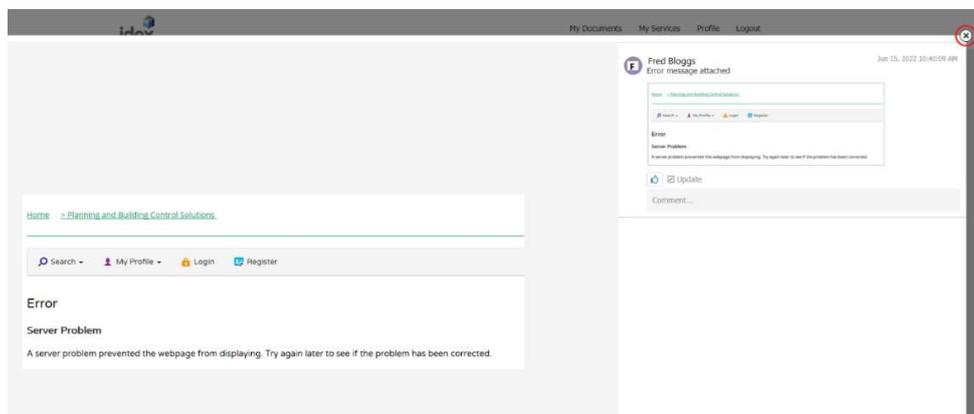
When uploaded, the image will display, but can be cancelled by clicking on the  symbol shown at the top right hand side



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



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



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.

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

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

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:

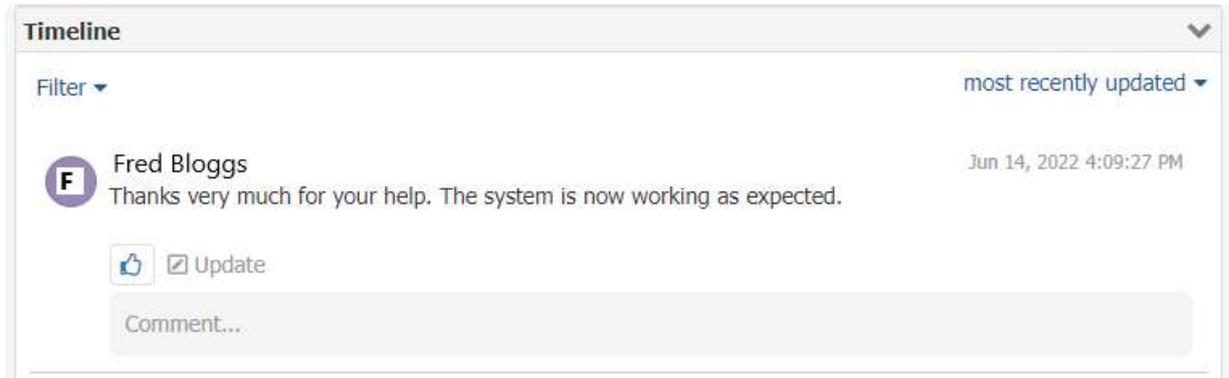
- Please ensure appropriate **Idox reference number** (IDXIN00397719 in this case) is included in the **Subject: line** when sending emails to your **primary business unit's Service Desk**. This will ensure that the active request gets updated promptly and there is no risk of **duplicating** the request.
- 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



Timeline

Filter ▾ most recently updated ▾

F Fred Bloggs Jun 14, 2022 4:09:27 PM

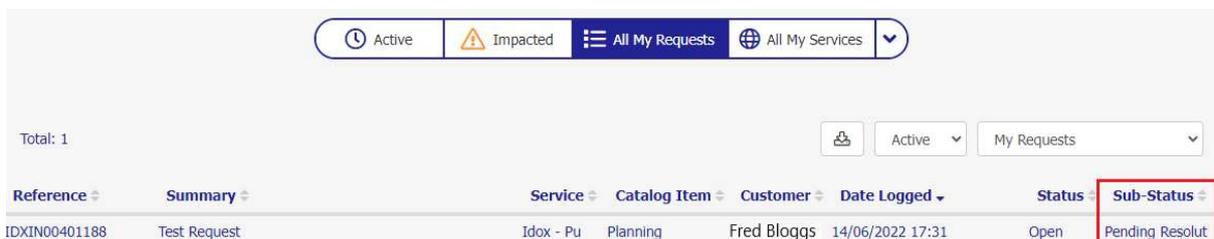
Thanks very much for your help. The system is now working as expected.

 Update

Comment...

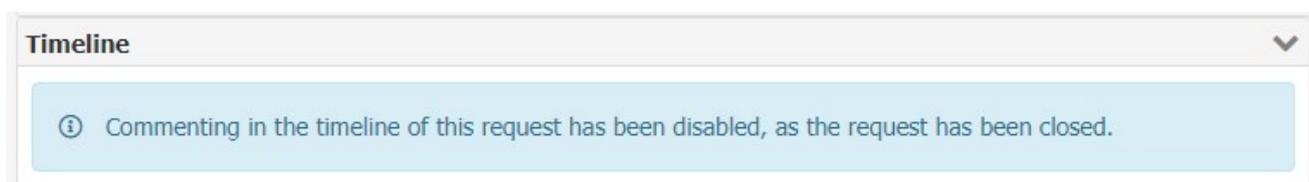
10.2 Request Closure

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



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

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

10.3 Request Resolved Notification

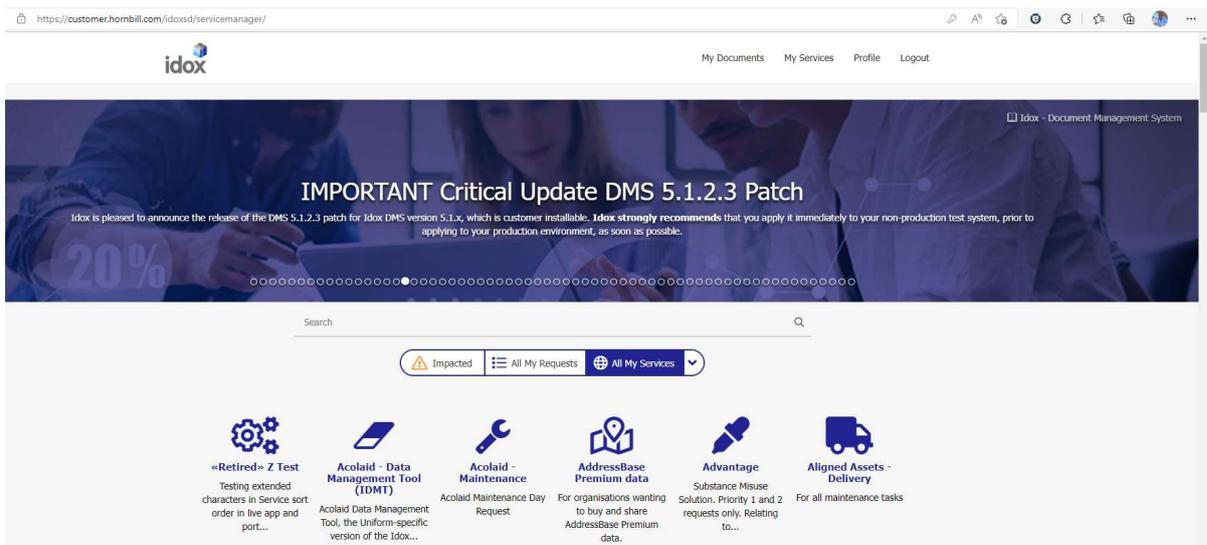
You will receive an email notifying you of the request closure

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 de-support notices and are via **Bulletins** and **Announcements**. Depending on the service, there may also be an Announcements tab available

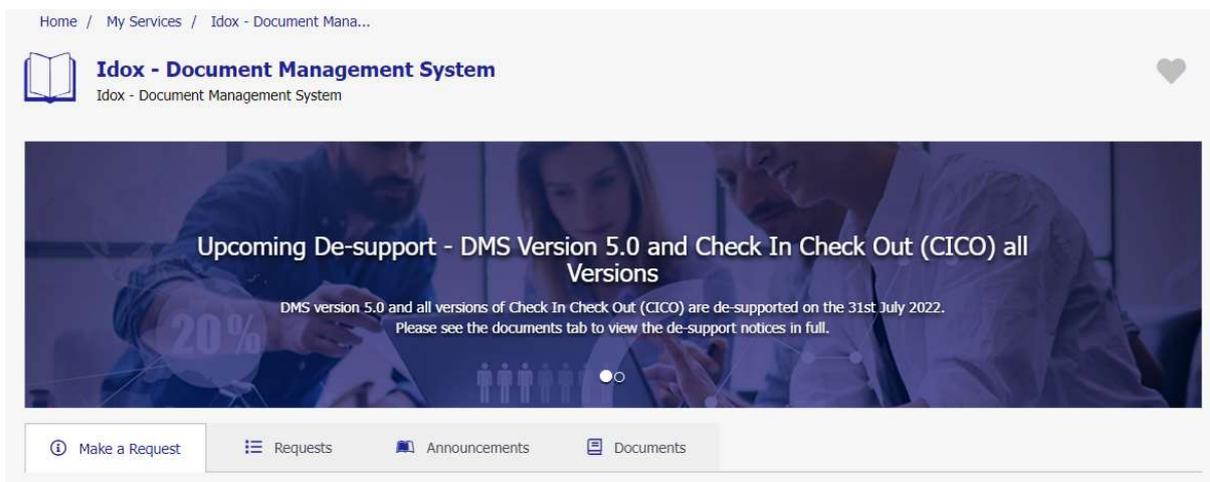
11.1 Bulletins

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

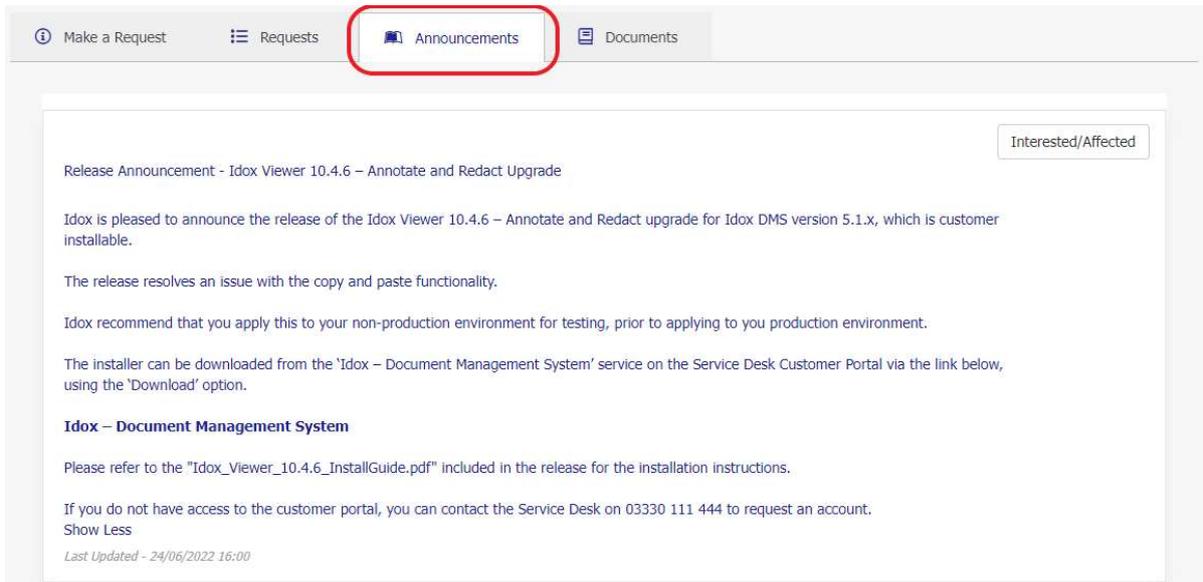


11.2 Announcements

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



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

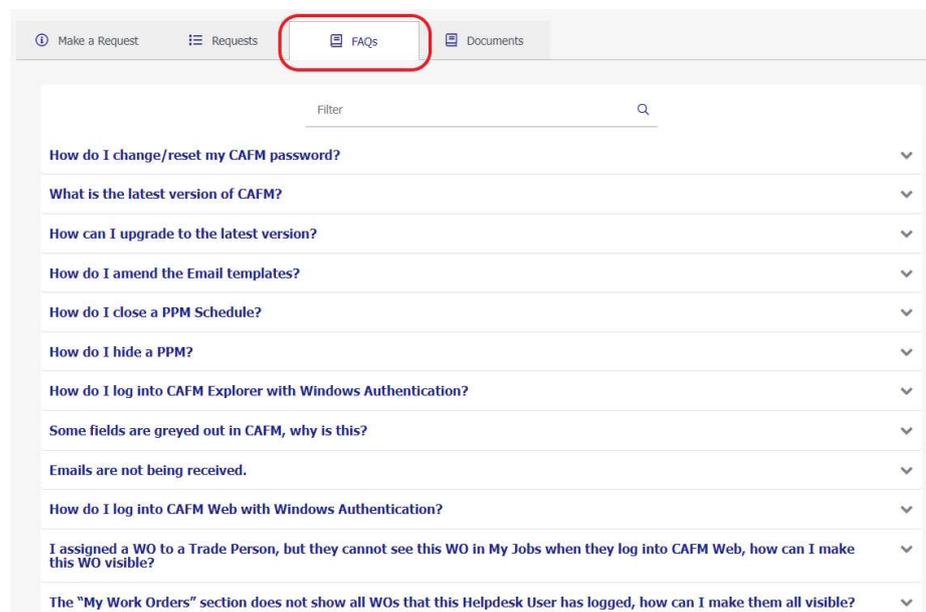


CAFM Explorer Download

For downloading releases and patches. Please select your current version from the link and download

11.3 Known Issues/FAQ's

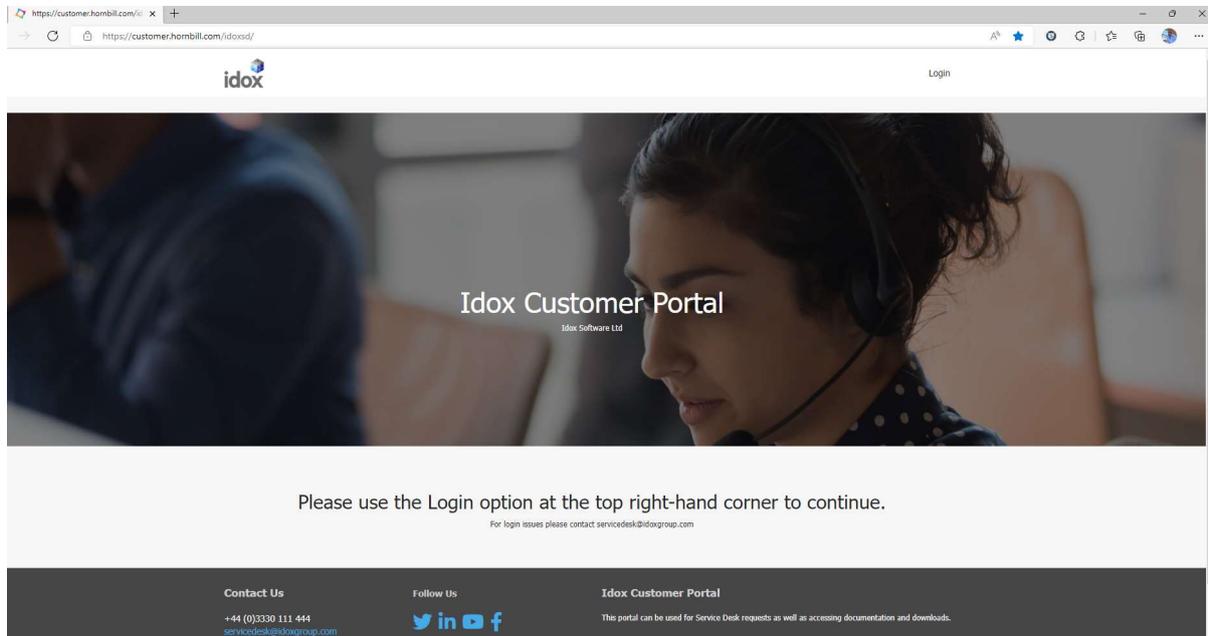
Again, depending on the Service there may be a **FAQ's** tab available



12 Finding Documents & Downloads

12.1 Finding Documents

Log onto your Customer Portal account: **URL:** <https://customer.hornbill.com/idxsd/>



Enter your credentials as follows:

Login ID: Your email address

Password: Enter your secure password

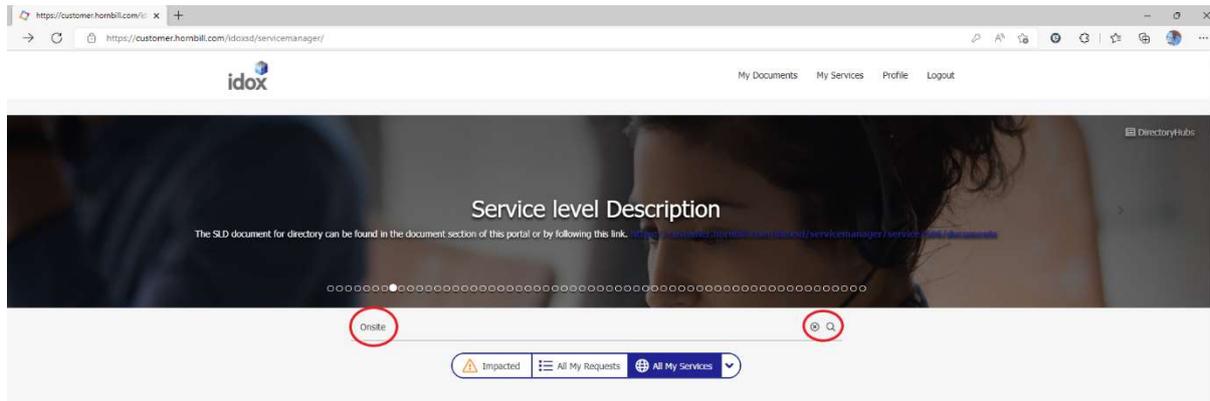
Please click on "FORGOT PASSWORD" to set secure password



a

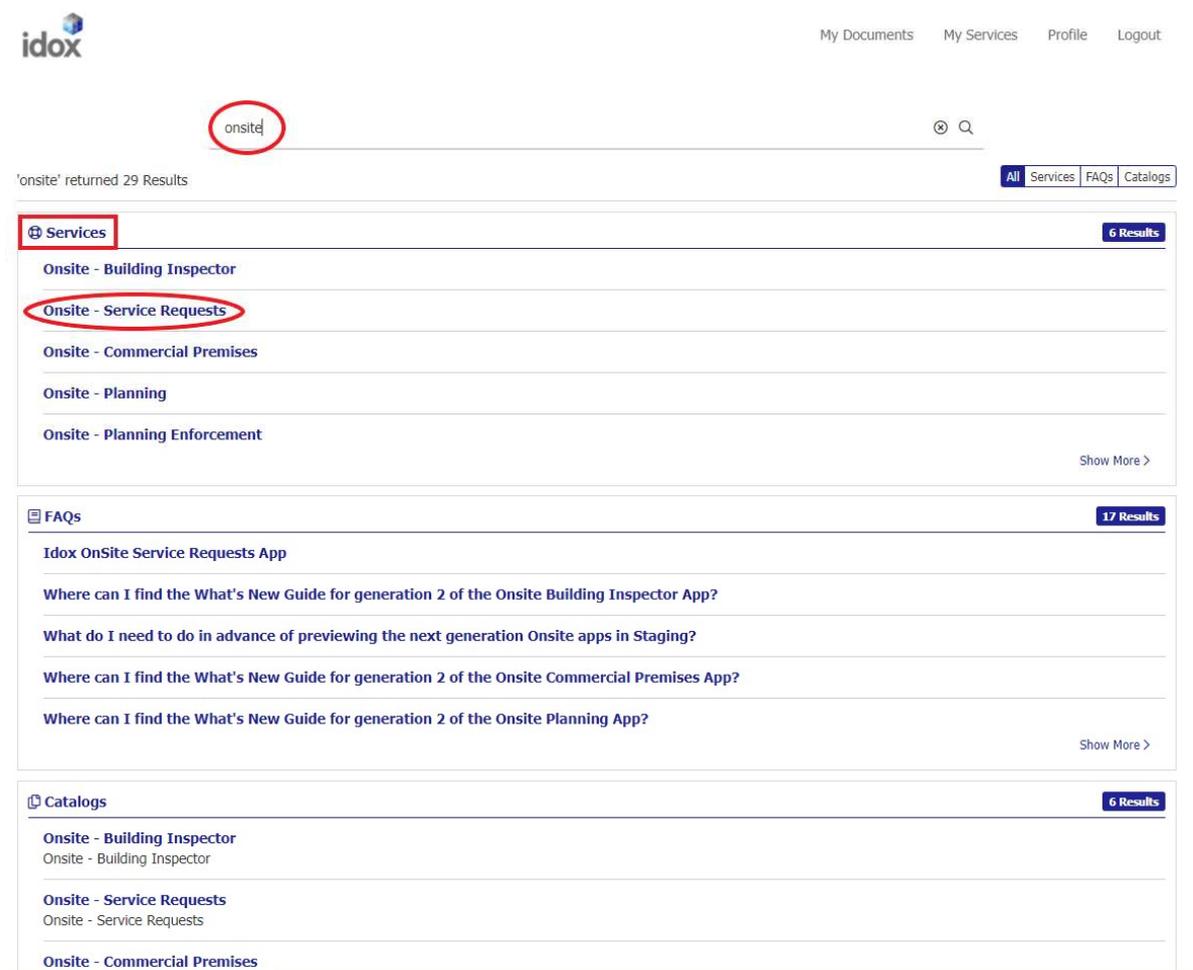
This must be at least 6 characters and contain numbers, letters and a special character such as "!" - it cannot be a password that has previously been used

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

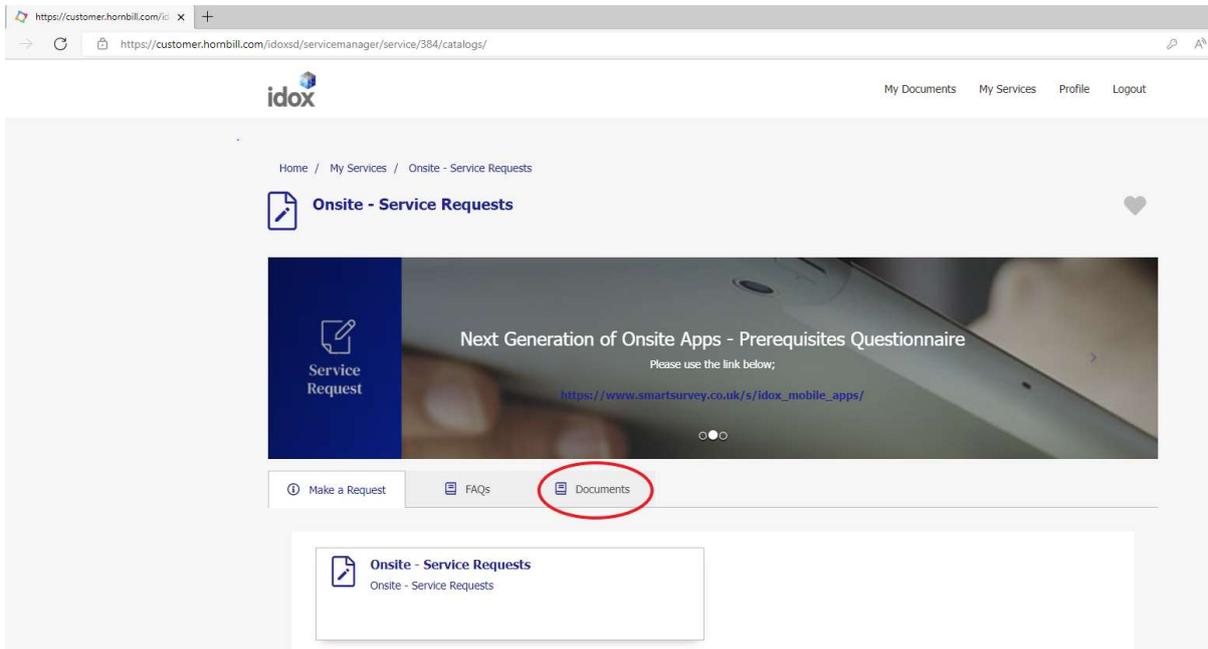


Then click on the  symbol and a list of products will be displayed.

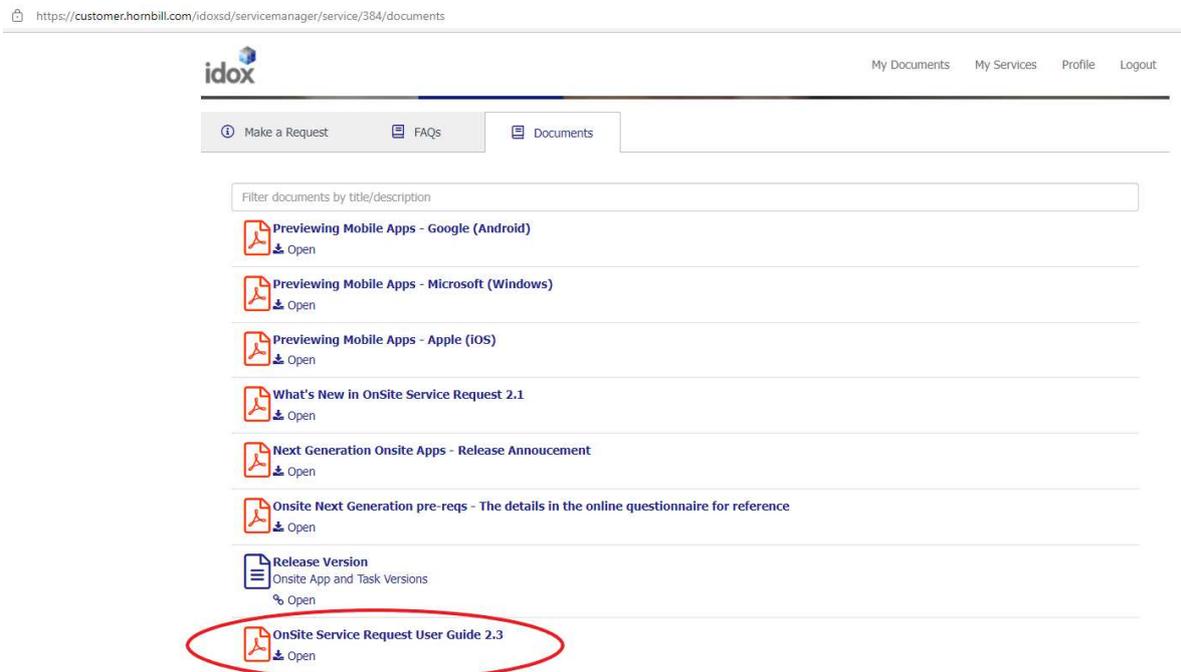
Click on the required service, shown under the  **Services** heading



Then click on the "Documents" tab



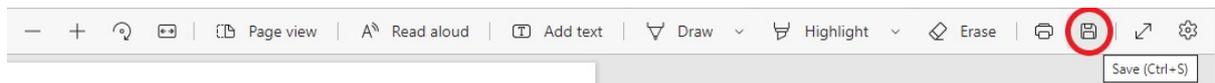
The available documents for that service will be listed



Click on  Open and the document will display in a new tab

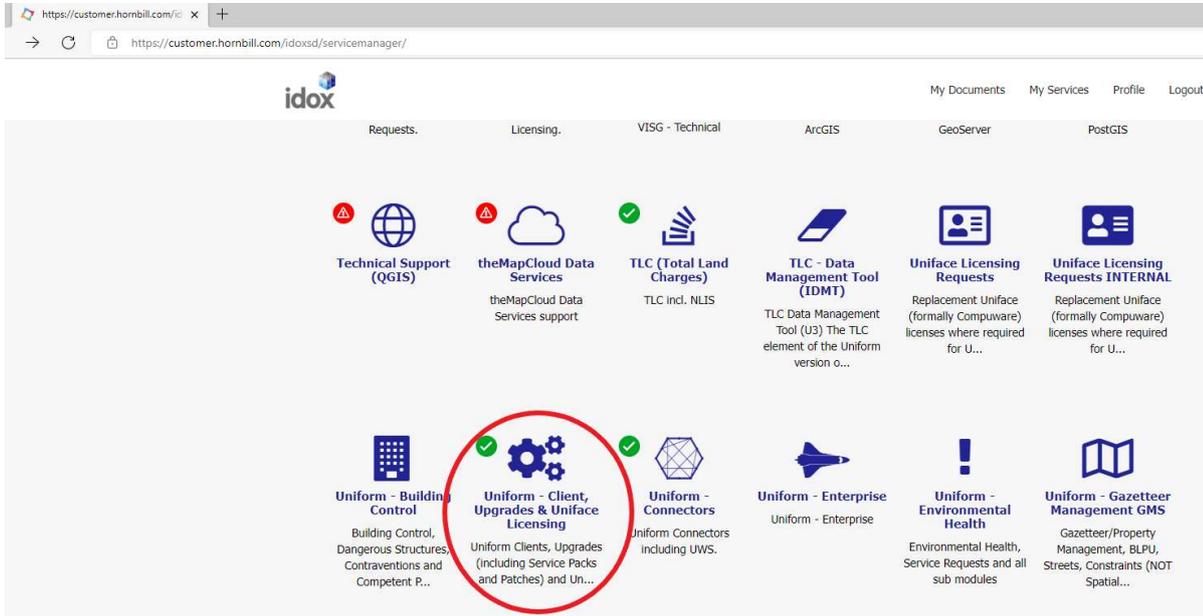


This PDF document can then be saved in the usual way by clicking on the "Save" symbol on the taskbar at the top of the document

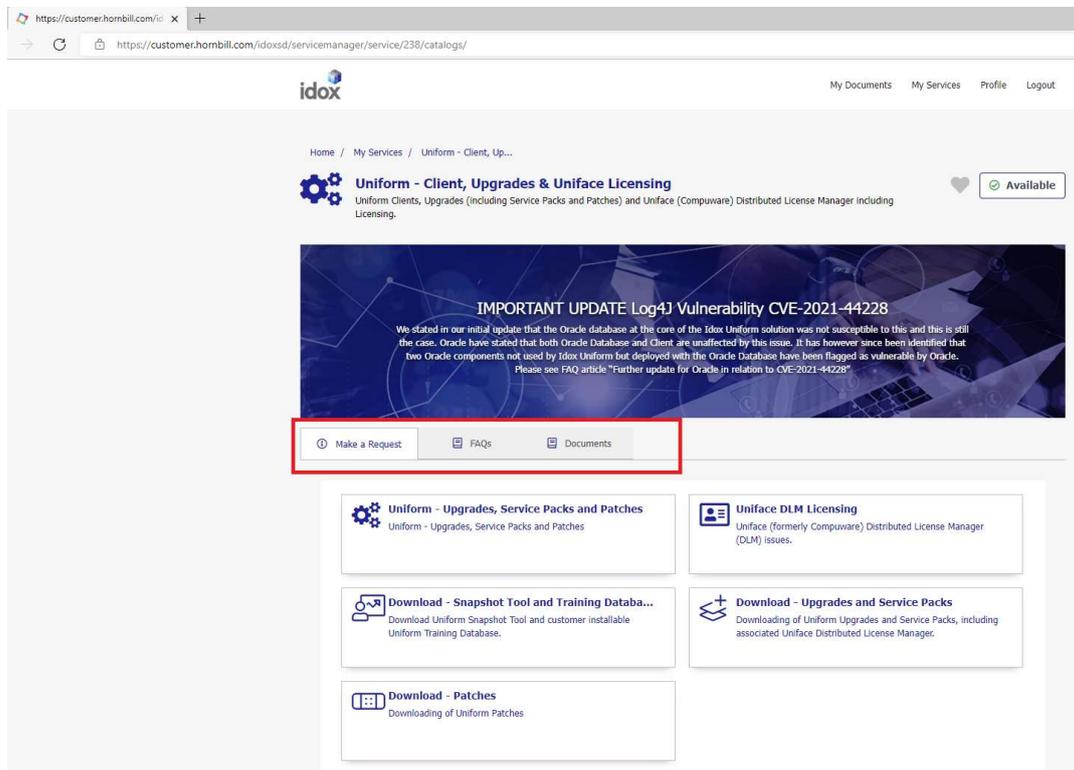


12.2 Alternative Method

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

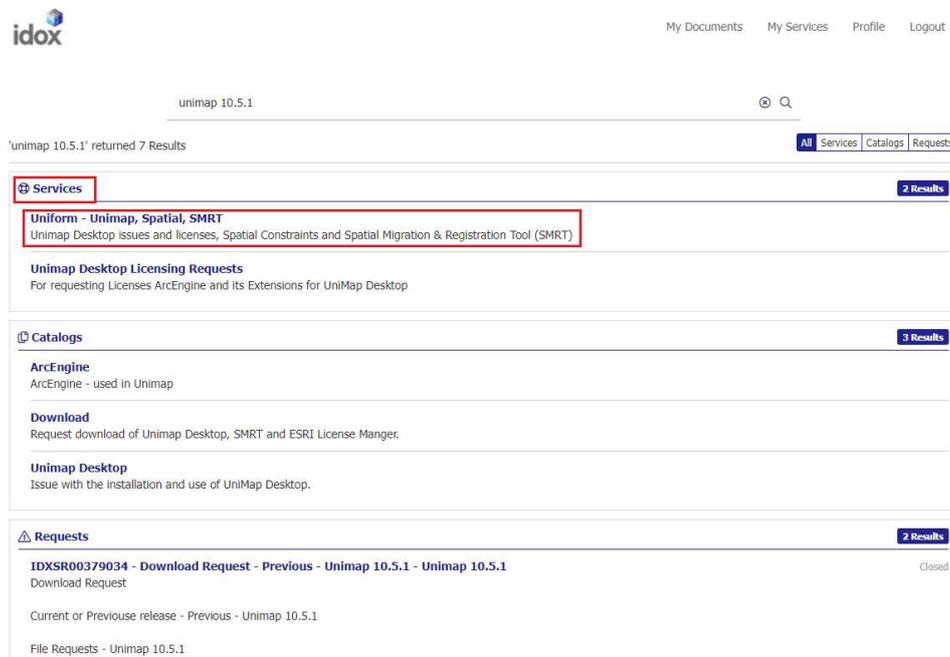


Click on the appropriate tab to access the content or on the panels for the options described



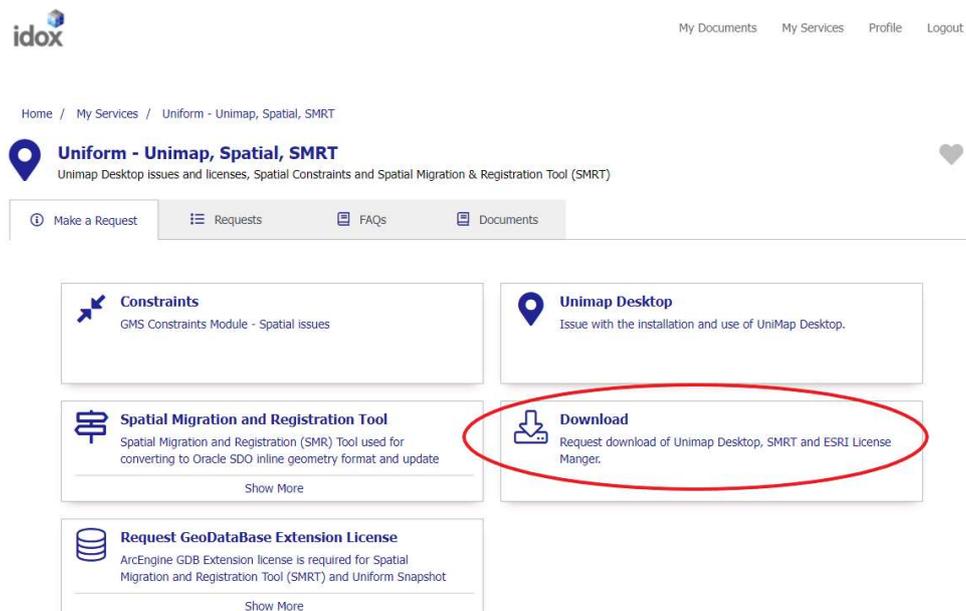
12.3 Finding Software Downloads

Log into your Customer Portal account as above, and on the "Search" bar enter your search parameter, here it is Unimap 10.5.1 then click on the  symbol



The screenshot shows the idox search results for 'unimap 10.5.1'. The search bar contains 'unimap 10.5.1' and the search icon. Below the search bar, it says 'unimap 10.5.1' returned 7 Results. There are three tabs: 'All', 'Services', and 'Requests'. The 'Services' tab is selected and highlighted with a red box. Under 'Services', there are two results: 'Uniform - Unimap, Spatial, SMRT' (highlighted with a red box) and 'Unimap Desktop Licensing Requests'. Under 'Catalogs', there are three results: 'ArcEngine', 'Download', and 'Unimap Desktop'. Under 'Requests', there are two results: 'IDXSR00379034 - Download Request - Previous - Unimap 10.5.1 - Unimap 10.5.1' and 'File Requests - Unimap 10.5.1'.

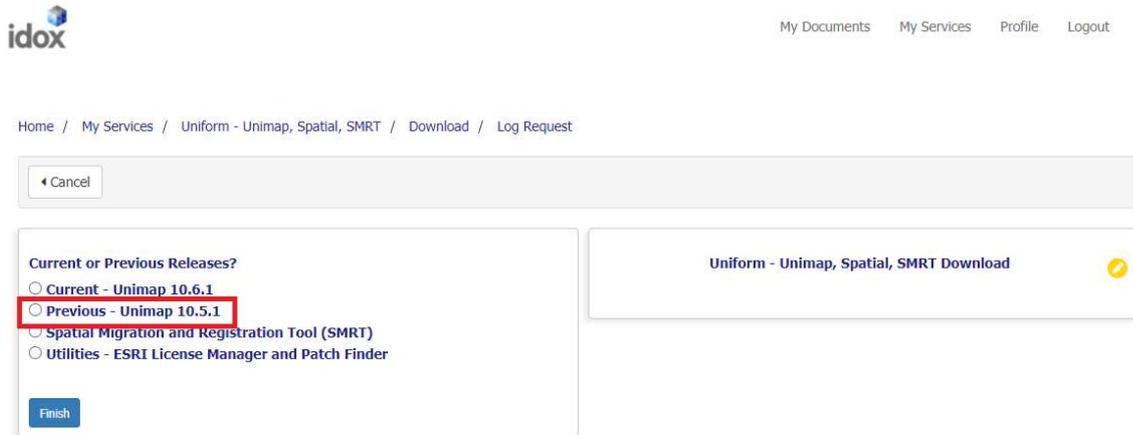
Under the  **Services** heading click on "Uniform - Unimap, Spatial, SMRT" and you will be presented with the following screen



The screenshot shows the idox service page for 'Uniform - Unimap, Spatial, SMRT'. The breadcrumb trail is 'Home / My Services / Uniform - Unimap, Spatial, SMRT'. The service title is 'Uniform - Unimap, Spatial, SMRT' with a location pin icon. Below the title, there are four tabs: 'Make a Request', 'Requests', 'FAQs', and 'Documents'. The 'Requests' tab is selected. Below the tabs, there are five service cards: 'Constraints', 'Unimap Desktop', 'Spatial Migration and Registration Tool', 'Request GeoDataBase Extension License', and 'Download'. The 'Download' card is circled in red. The 'Download' card contains the text: 'Request download of Unimap Desktop, SMRT and ESRI License Manger.'

Click on "Download"

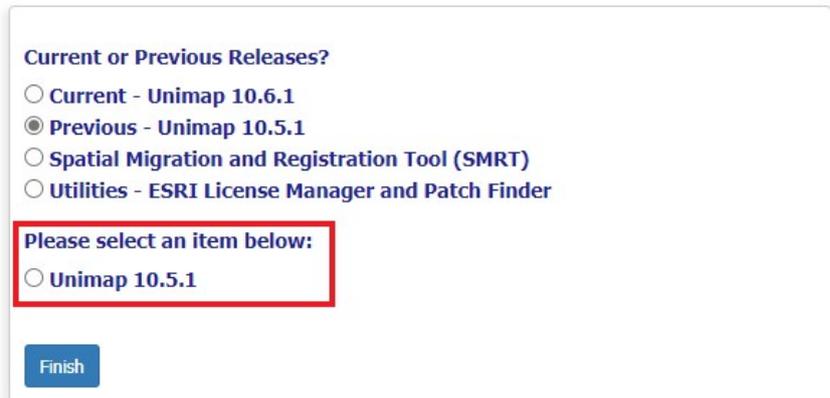
You will then be shown a list of available software. Click on the option "Previous - Unimap 10.5.1 "



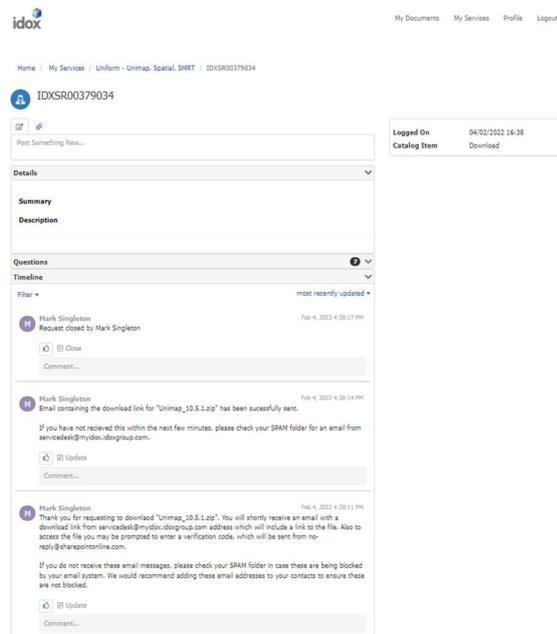
Clicking on the radio button will then present you with the following option

Click on the required item

Then click on "Finish"



The Customer Portal will then create a Service Request and email you from it



Once the email is received, click on "Open"

ServiceDesk - NoReply shared "Unimap_10.5.1" with you.

ServiceDesk - NoReply <servicedesk@myidox.idoxgroup.com>
To: Mark Singleton

If there are problems with how this message is displayed, click here to view it in a web browser.

Your download will be then available in a .zip file

← → ↻ 🏠 myidox-my.sharepoint.com/personal/servicedesk_myidox_idoxgroup_com/_layouts/15/onedrive.aspx?id=%2Fpersonal%2Fservicedesk_myidox...

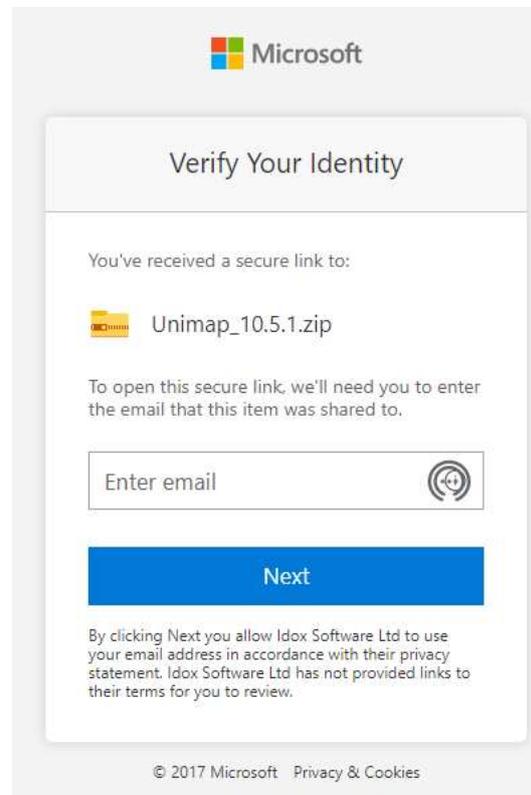
[Share](#) [Copy link](#) [Download](#) [Copy to](#)

Unimap_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 Gi	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



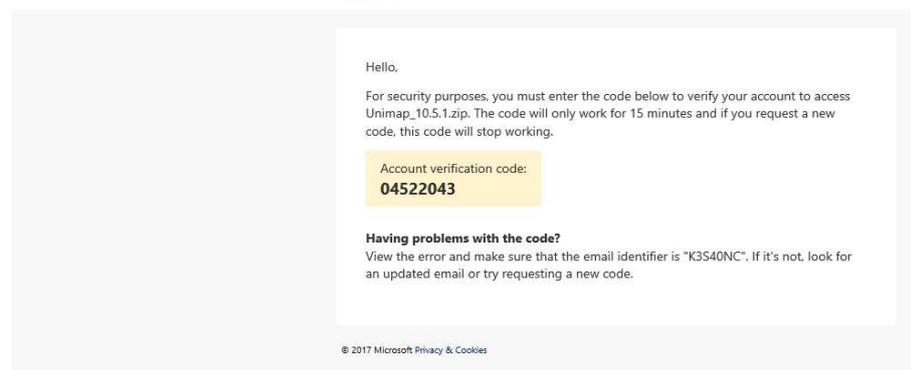
Enter your email address and click on "Next"

You will then be emailed a verification code

04522043 is your Microsoft OneDrive verification code.



OneDrive



Enter the code into dialogue box and click on "Verify"

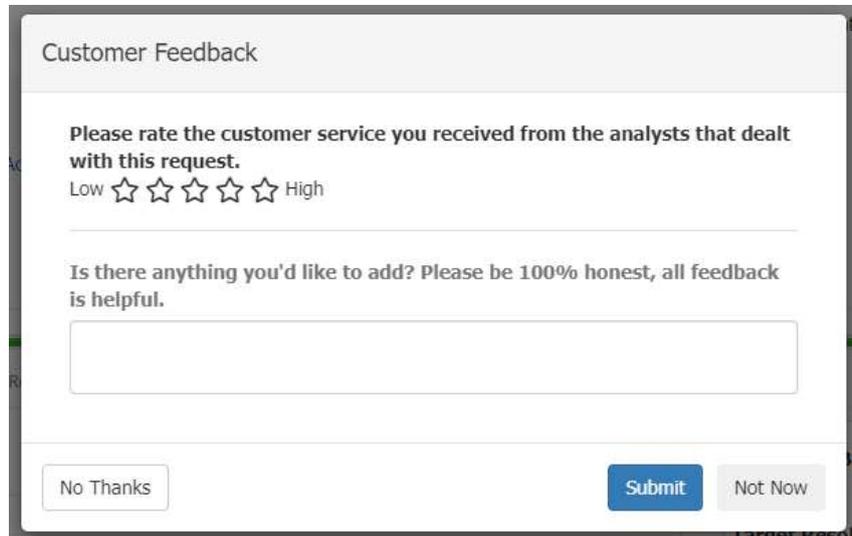
the then

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 ☆☆☆☆ High

Is there anything you'd like to add? Please be 100% honest, all feedback is helpful.

No Thanks Submit Not Now

If you don't see this then a green **Give us your feedback** button will be displayed at the top of the request



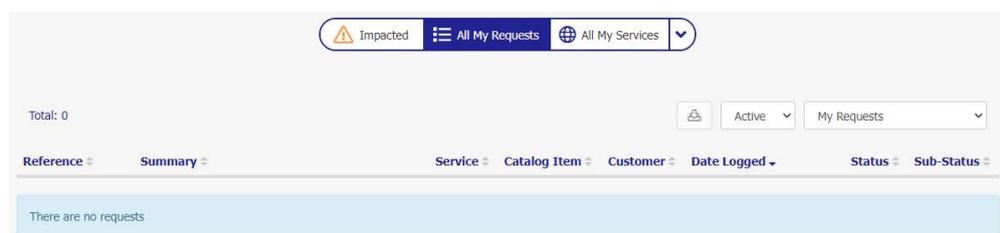
IDXIN00397719
Test Request Only

Validation Response Investigation

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 requests will be displayed. In this case there are no open requests



Impacted All My Requests All My Services

Total: 0 Active My Requests

Reference Summary Service Catalog Item Customer Date Logged Status Sub-Status

There are no requests

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

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/>