ITSM-Self Service (ENU)

CONTENTS

1. Overview

Access the Ivanti Self-Service landing page to submit requests, track incidents, and explore knowledge articles in a user-friendly interface. This help is intended for employees and external customers who use the Self Service portal to request business services from IT, HR or other areas. In addition to logging a **Service Request/raising** a ticket, users in the Self Service portal can also create **Incidents**, check the status of current records, search for **knowledge articles** and more.

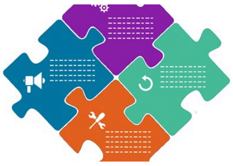
If you are an IT Support staff looking for information on how to use the Service Desk console, refer to **Using the Service Desk console**. And if you are an Administrator looking for information on how to configure and setup the application, refer to **Configure and Administer**.

Getting Started

Create and track issues in the Self Service portal.

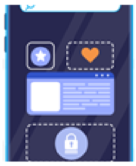
How do I?

Some scenarios for using the Self Service portal.



Workspaces

How to use the different workspaces in the Self Service portal.



Self Service Mobile Portal

How to use the Self Service Mobile portal.

2. Getting Started with Self Service portal

This topic helps you get started with using the Self Service portal as a Self Service User. Use the portal to create and track incidents and service requests, and view company-wide announcements, FAQs and knowledge articles.

> A mobile version of the portal is available for Self Service Mobile users who use smart phones or tablets. For more information, see **Self Service Mobile Portal**.

Logging in to the Self Service portal

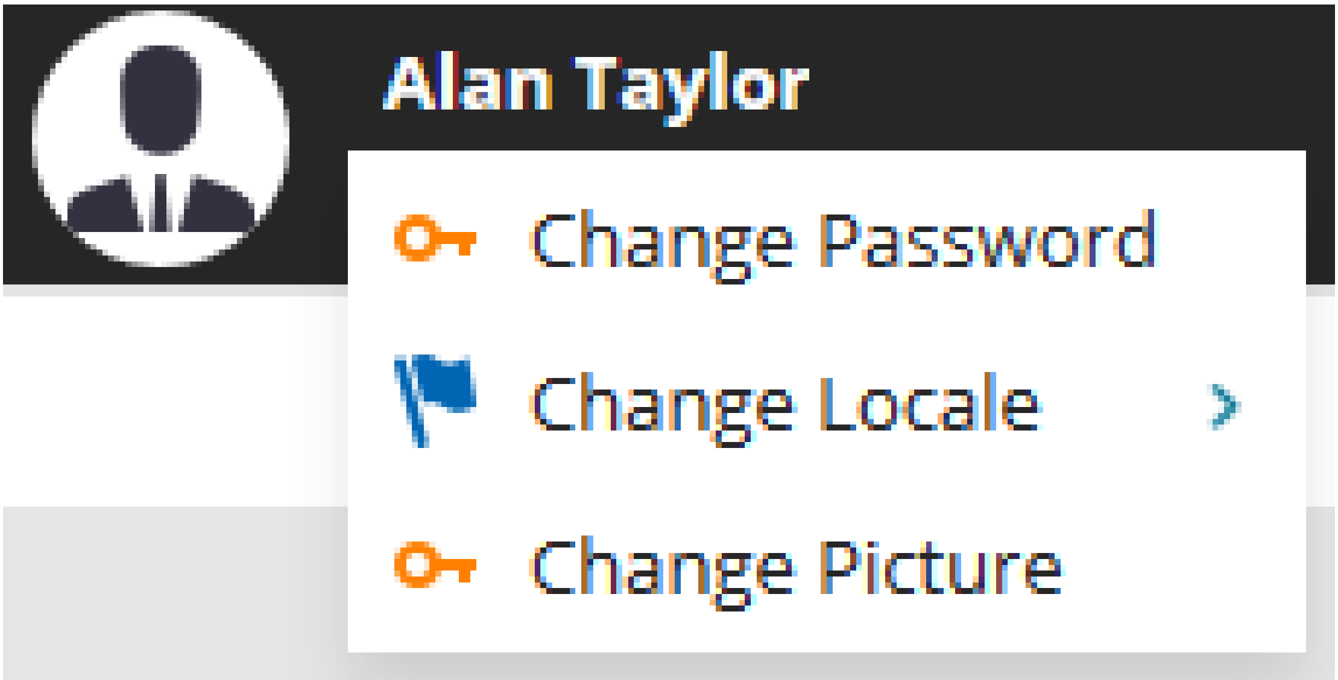
You must be assigned the Self Service User role to log in to the portal.

1. In a browser, enter the login URL provided by your administrator.
2. Enter your username and password in the login page.
3. Click **Login**. A list of roles displays.
4. Scroll down and select the **Self Service User** role, then click **Submit**.

Changing your password, language, and profile picture

To change your password

1. Log in to the Self Service portal.
2. Click your username. From the drop-down list, click **Change Password**.



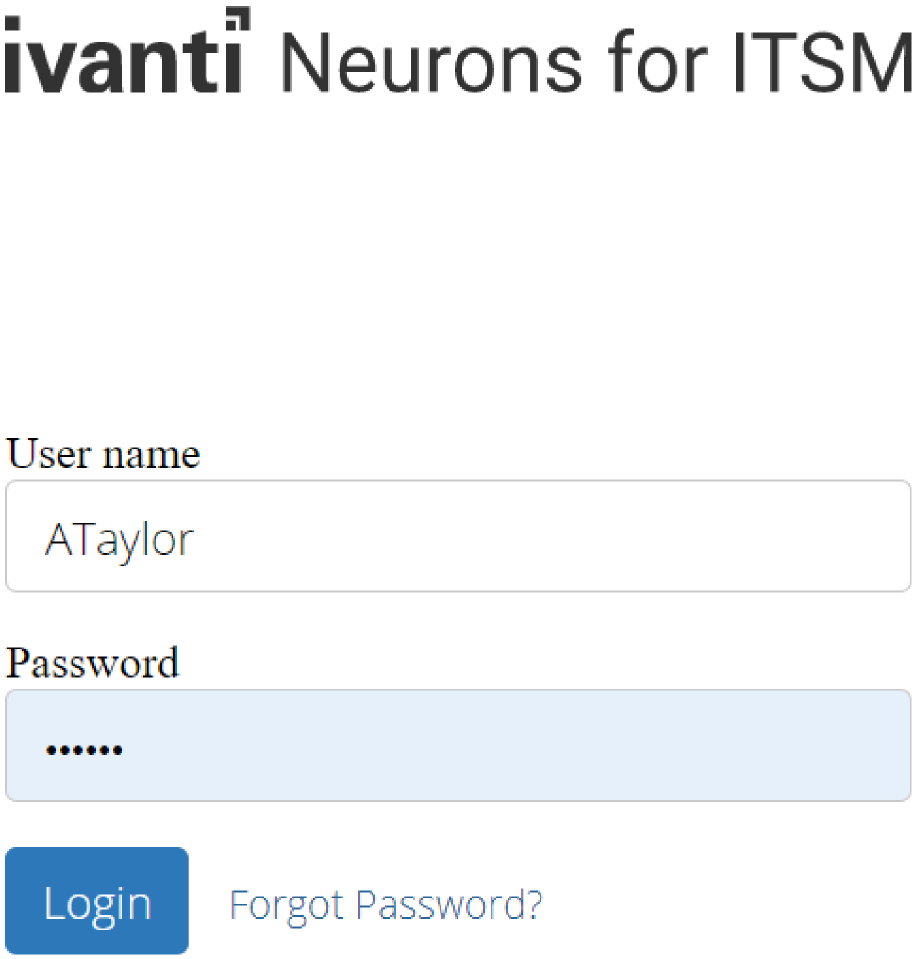
3. In the **Change Password** dialog, enter your old password, then enter the new password and confirm it. Note that passwords are case sensitive.
4. Click **Change**.
5. Log out and log in again with the new password.

To reset your password

This feature is only available for internal authorization and does not work for external login.

1. Click **Forgot password?** from the main login window.

   Forgot Password



2. Enter your user name or email address and click **Submit**.

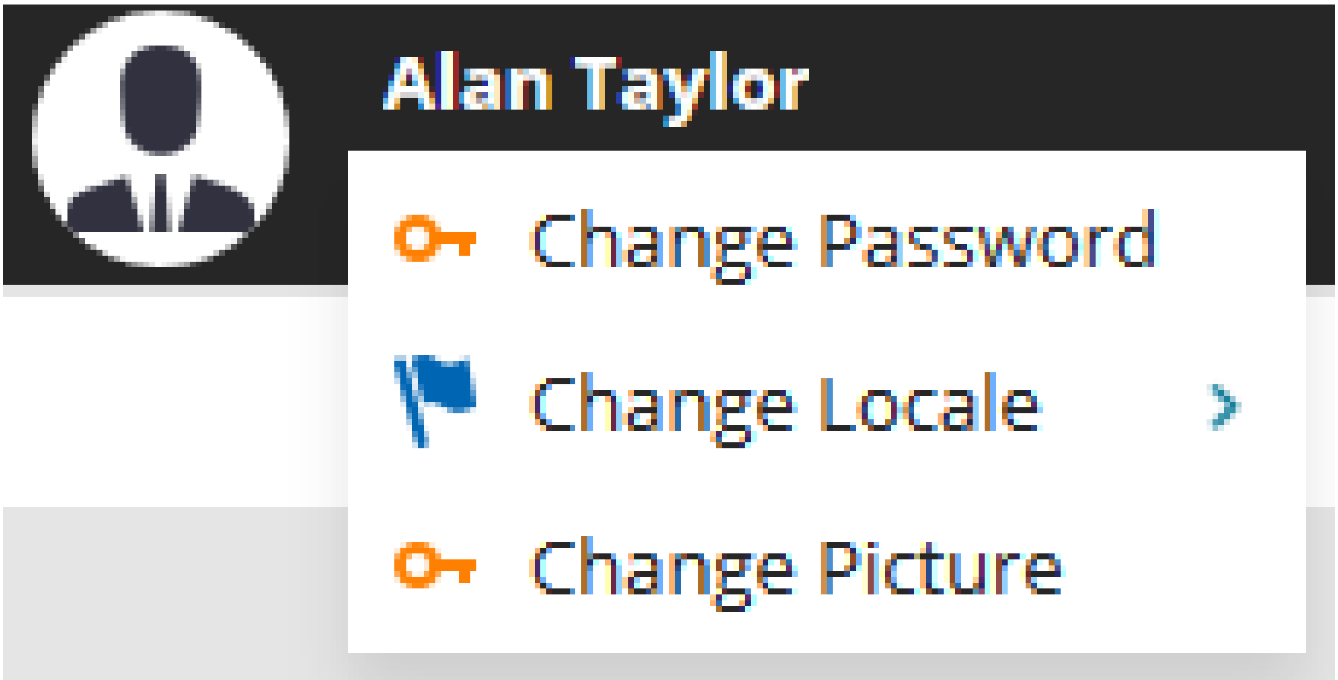
   You will receive a one-time reset link to your registered email address. The link will expire in 20 minutes or as configured by your administrator.

2. Click the link. You will be re-directed to the **Reset Password** page.
3. Enter your **User ID**, **New Password** and **Confirm Password**. If you do not know your **User ID**, contact your organization's administrator.
4. Click **Submit**.

To change the language

The default language for the application is English (United States). However, if your administrator has given you privileges, you can change the language displayed in the interface to that of your preference. Your changes will be retained, and you will be logged in with the set language until you change it again.

1. Log in to , click your username from the top menu.
2. Hover mouse over **Change Locale**. A list of languages set up by your administrator is displayed.



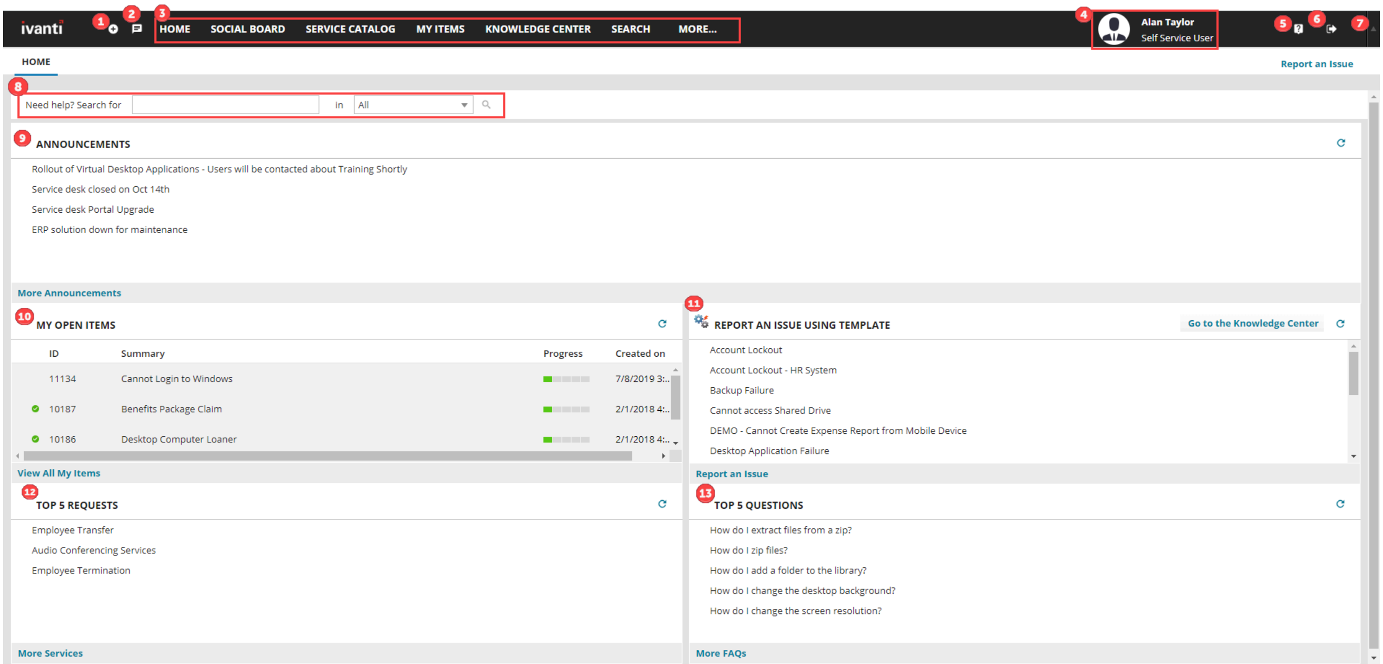
3. Select the language to use. The application automatically refreshes with the changed locale.

To change your user account profile picture

1. Log in to , click your username from the top menu.
2. Click **Change Picture**.
3. In the **Change Photo** dialog, click **Browse** to select an image file.
4. Click **Save**. The selected picture is displayed next to your user name.

2.1. Navigating the Self Service portal

The **Home** workspace is the default view for the portal. Your portal may have a different look and feel from the image below, based on the settings provided by your administrator. For example, the colors and the exact modules might not be the same for all user roles.



The different areas of the portal's **Home** workspace are described below:

1. Workspace list - This icon is another way to access workspaces. Click the icon and select a workspace from the list.

2. What's new on Social Board - This icon is a shortcut to open unread messages and post new ones on the Social Board. The number displayed on the icon indicates the unread messages you have. If Social Board is not activated, you do not see a number. Click the icon to activate Social Board.

3. Workspaces - Use the portal workspaces (**Home**, **Social Board**, **Service Catalog**, and so on) to complete a variety of tasks. Click **More** to view additional workspaces for your user role.

4. Logged-in user and user role - Click your username to open a menu for changing the password, locale (language) for the application, or adding/updating your profile picture. Click your user role to switch to another user role you are assigned to.

5. Help icon - Click this icon to access the help documentation if you need information on any feature.

6. Logout icon - Click this icon to log out of the application.

7. Full screen mode button - Click this icon to view the application in full screen. To switch back, click the **Exit Full Screen** icon .

8. Search panel - Use the fields and options in this panel to search and find FAQs, announcements, and knowledge articles by specific keywords. To refine your search to specific module, select the module in the **in** field.

9. Announcements - Announcements that your organization wants to communicate globally to employees.

10. My Open Items - Your submitted service requests and reported incidents. Select an item in the list to view its details. If the list is empty, you have no open items.

11. Report an Issue using Template - Report an issue using a pre-configured template. The templates auto-fill certain fields to make reporting a bit easier. To report an issue without using a template, click **Report an Issue** at the bottom of the section.

To report an issue using a template

1. Under **Report An Issue Using Template**, select a template that matches your issue. A form is displayed with auto-filled fields.
2. Before modifying information in the fields, browse the **Possible Solution** panel on the right to see if you can resolve the issue on your own. If one of the solutions works, click **Resolve** (bottom right of panel) to close the incident.
3. If no solution works, ensure the **Summary**, **Description**, and **Urgency** fields are filled out correctly.
4. Click **Save Incident** to report the issue. Once saved, the issue becomes an incident with an ID that displays in your **My Open Items** list.

After an incident is closed, you may receive a survey email requesting feedback about how effectively your issue was solved. Your survey response will be stored with the incident.

12. Top 5 Requests - The most common service requests submitted by users. You can select from this list when submitting a request, or you can click **More Services** (at the bottom of the section) to open the Service Catalog and search all request categories.

To submit a top 5 request

1. Under **Top 5 Requests**, select the request that matches your need. A form is displayed; each form is different, depending on the request type you selected.
2. Enter information into the fields.
3. When finished, click **Review & Submit** to review the information for accuracy. To change any information, click **Edit/Back** and modify the information as needed.
4. Click **Submit**.

Track the request from your **My Open Items** list in the Home workspace.

13. Top 5 Questions - The most common questions asked by users. Select a question in the list to display a detailed answer. Click **More FAQs** (at the bottom of the section) to open the FAQ workspace and browse all published FAQs.

3. How do I?

This topic helps you with the information you need to perform different tasks using the workspaces. You can access the workspaces from the workspace menu at the header bar at the top of the portal.

View My Items (service requests and incidents)

1. From the workspace menu, click **My Items**. A list of your submitted service requests and reported incidents is displayed:
   - To find a specific item, enter a keyword into the **Search My Items** field and use the drop-down list to focus the search. Then click the icon.
   - To view a listed item in detail, click it. When viewing the details, you can amend an item for any reason by adding a note or an attachment to it.

For more information, see **My Items**.

Submit a Service Request

1. From the workspace menu, click **Service Catalog**.
2. Browse by category in the left navigation pane. When you find the correct item to place a request for, select it in the main pane.
3. In the form displayed, enter information into the fields as needed. If it's more than one page, click **Continue** (in the bottom right) to progress through the form. Each form is different, depending on request type you selected.
4. When finished, click **Review & Submit** to review the information for accuracy. To change any information, click **Edit/Back** and modify the information as needed.
5. Click **Submit**.

Track the request from your **My Open Items** list in the **Home** workspace or in the **My Items** workspace.

For more information, see **Service Requests and Incidents**.

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Report an Incident

1. From the workspace menu, click **Service Catalog**.
2. In the left navigation pane, click **Report New Incident**. From the main pane, select the option that matches your problem. If your issue doesn't match the available options, click **New Incident**.

   A form is displayed with auto-filled information.

3. In the form displayed, enter information into the fields as required. Before doing so, browse the **Possible Solution** panel on the right to see if you can resolve your issue with one of the suggested fixes:
   - If a related article appears to match your issue, click the title to open it.
   - If the solution works, click **Resolve** (bottom right of the panel) to close the incident. If it does not work, then click **Back** (top left of the panel) to check other solutions.
4. If no solution works, fill out the fields as required.
   - In the **Description** field, provide details that thoroughly describe your problem.
   - In the **Urgency** field, select the level of urgency that this problem presents.
5. Click **Save Incident**.

Once saved, the issue becomes an incident with an ID that you can track in your **My Open Items** list in the **Home** workspace or in the **My Items** workspace.

For more information, see Service Requests and Incidents.

Post messages for teams, groups, or users

1. From the workspace menu, click **Social Board**.
2. Click in the **Share What's New** field to enter a message. By default, everybody will see this message once you share it. To narrow the audience for this message:
   - Click **Add Group**. From the drop-down list, select a team, group, or user role to share this message with. Click **Add**. Repeat as necessary.
   - Click **Add Person**. Start typing a username and select from one in the list to share this message with. Click **Add**. Repeat as necessary.
3. Click **Share** to send your message. Your message appears at the top of the list.

To respond to a message, type in the **Add a comment** field of the message and press the Enter key.

To find specific messages, enter text in the **Search Post** field (top right of page) and click the icon.

To filter the real-time stream of messages in the main pane, use the filter criteria in the left Activity Stream pane.

For more information, see Social Board messages.

Search all FAQs, announcements, or knowledge articles

1. From the workspace menu, click **Search**. A list view displays all available content—FAQs, announcements, and articles.
2. From the list, click a title to view the information in detail.

To find specific content, enter text in the **Search for** field (top left of page) and click the icon.

To filter the list, click a type (FAQ, announcement, or knowledge) or a time period (created during last 7 days, 30 days, and so on) in the left pane.

For more information, see **Announcements, FAQs, and Alerts**.

4. Using the workspaces

Each workspace in the Self Service portal has different capabilities and is used to perform different functions. To find out more about each one and the tasks you can complete as a Self Service User, select a link below:

- View, update, or close one of your submitted service requests and incidents. For details, see **My Items**.
- Submit a new service request or report a new incident. For details, see **Service Requests and Incidents**.
- Browse knowledge articles that can help you resolve a problem. For details, see **Knowledge Center**.
- View announcements, FAQs, and alerts that are posted to the portal. For details, see **Announcements, FAQs, and Alerts**.
- Use the Social Board to send and receive messages from other users. Learn how to search for, filter, and delete messages, as well as set up groups of users to share messages with. For details, see **Social Board messages**.
- Chat with others using the instant messaging Chat Zone. For details, see **Chat Zone**.

4.1. My Items

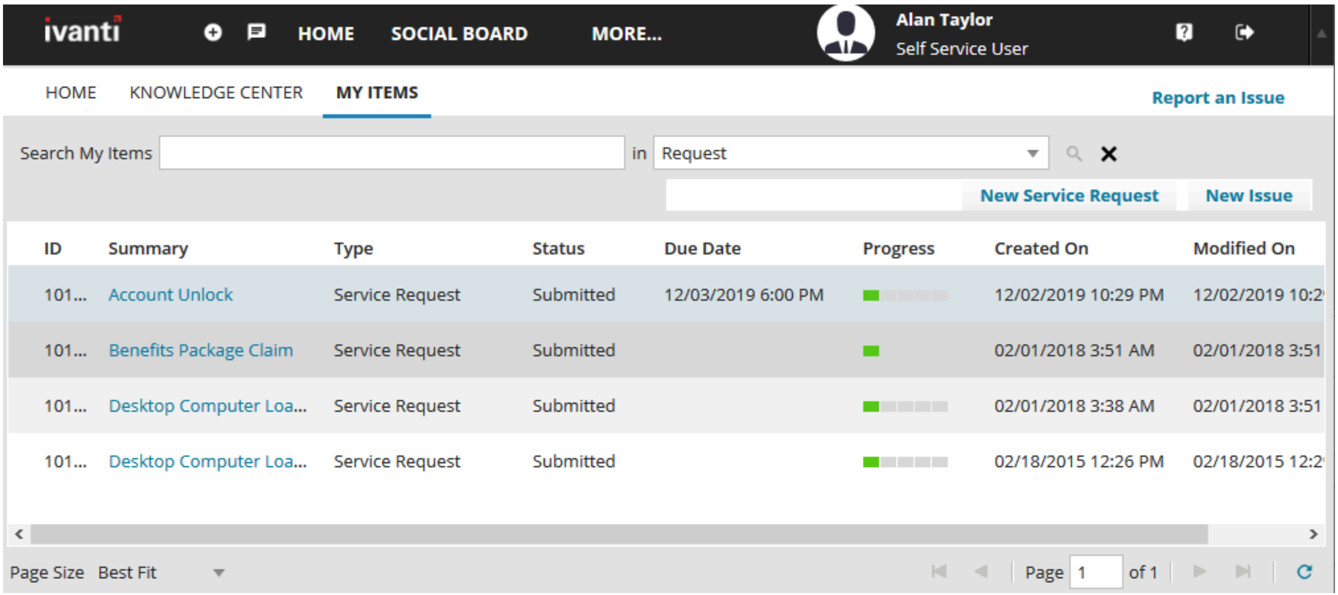
You can use the **My Items** workspace to track your submitted service requests and reported incidents. If needed, you can also submit a new service request or incident from this page.

You can track the same list of items from your **My Open Items** list in the **Home** workspace.

To view your items

To view items - service requests or tickets raised and incidents created by you,

Click **My Items** from the workspace menu to open My Items, where a list view displays all of your submitted requests and incidents.



To view your items' status and other details

From the list view, click a record to view it's status and other details.

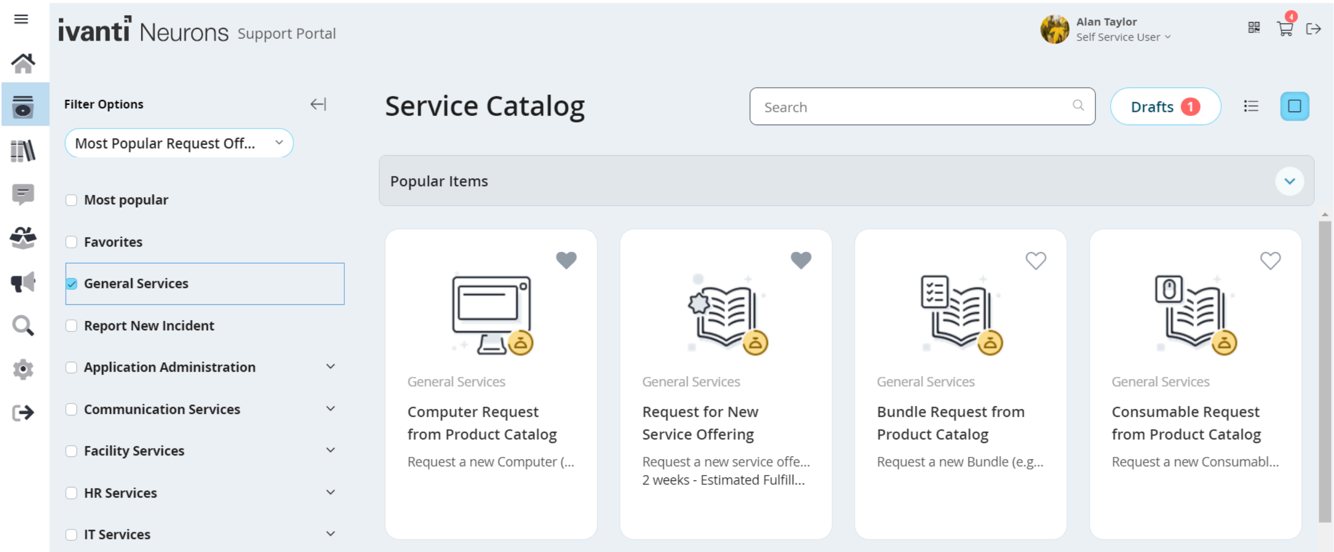
Click **Back to My Items List** to return to the list view.

You can filter the list view as needed. Note that an administrator can view all of the items in this list:

- To search for a specific item, enter a keyword in the **Search My Items** field and click the icon. The matching results will display.
- To focus the search, use the search drop-down list to select a category of Request, Issue, and so on.
- To clear all search criteria, click the icon.

To submit a Service Requests

1. From the workspace menu, click **My Items**.
2. Click **New Service Request** in the upper-right area of the page. The **Service Catalog** workspace opens.



3. Browse by category in the left navigation pane. When you find the correct item to place a request for, select it in the main pane.
4. In the form displayed, enter information into the fields as required. If the form is more than one page, click **Continue** (in the bottom right) to progress through the fields. Each form is different, depending on the request type you selected.
5. After entering all required information, click **Review & Submit**. Review the information for accuracy.
6. To make any changes before submitting, click **Edit/Back**. Note that once the request is submitted, you can't go back and edit the form.
7. Click **Submit**. The request will display in the list view where you can track it.

You may receive email updates from the Service Desk or Help Desk requiring additional information about the request. If this occurs, respond within the period of time indicated in the email; otherwise, the request will automatically close without resolution.

To update an in-progress Service Requests

> Starting with release 2026.1, you can add notes to any business objects only if an administrator has configured a trigger business rule to enable note creation in the self service page.

You can update a service request that's in progress by adding a note or an attachment (such as an image, document, and so on) to it. Those additions become a permanent part of the request record that you can't delete.

1. From the workspace menu, click **My Items**.
2. From the list view, open the request you want to update.
3. Click the **Service Request Progress** tab.
   - In the **Add a New Note** field, enter your note and click **Add Note**.
   - In the **Add an Attachment** field, click the icon to select a file to attach.
4. Click **Back to My Items List**. The request will update with the new information.

Next time you open this service request and click the **Service Request Progress** tab, you will see a time stamp with your note and or the attached file.

Edit a submitted Service Requests

> If the administrator has enabled the request editing option, you can view the **Edit Request** button for the submitted requests.

You can edit the submitted service requests only that are in active, or in progress status to add information or update the existing details.

1. From the workspace menu, click **My Items**.
2. From the list view, open the request you want to update.
3. Click **Edit Request** button, the confirmation page appears, click **Edit**.
4. In the request, update or modify the details and click **Submit**.

   > You can edit requests that are in **Draft**, or **Submitted**, or **In progress** state.

To report an incident

1. From the workspace menu, click **My Items**.
2. Click **New Issue** in the upper-right area of the page. A form is displayed.
3. Before selecting a template and entering information into the fields, browse the **Possible Solution** panel on the right to see if you can resolve the issue on your own. If one of the solutions works, click **Resolve** (bottom right of the panel) to close the incident.
4. If no solution works, click the **Template** drop-down list to find a template that matches your problem. Use **None** if no template is found.
5. Enter a **Summary** title for this incident and thoroughly describe the problem in the **Description** field. In the **Urgency** field, select the level of urgency that this problem presents.
6. Click **Save Incident**.

   Once saved, the issue becomes an incident with an ID that you can track.

   You may receive email updates from the Service Desk or Help Desk requiring additional information about the incident. If this occurs, respond within the period of time indicated in the email; otherwise, the incident will automatically close without resolution.

To update a logged incident

To help the Service Desk or Help Desk resolve an incident, you may need to add a note or attachment to it. You can only do so after logging the incident. Once you add a note or an attachment, it becomes a permanent part of the incident record that you can't delete.

1. From the workspace menu, click **My Items**.
2. Find the incident in the list view and open it.
   - In the **Attachments** section, click **Browse** and select a file to attach.
   - In the **New Notes** text box, enter your note.
3. Click **Save**, then click **Back to My Items List**.

To close an incident

You can close any incident you've created, regardless of its current status. Typical reasons include resolving it on your own, deciding that no further investigation is needed, or determining that it's closed after the Service Desk or Help Desk has updated the status to Resolved.

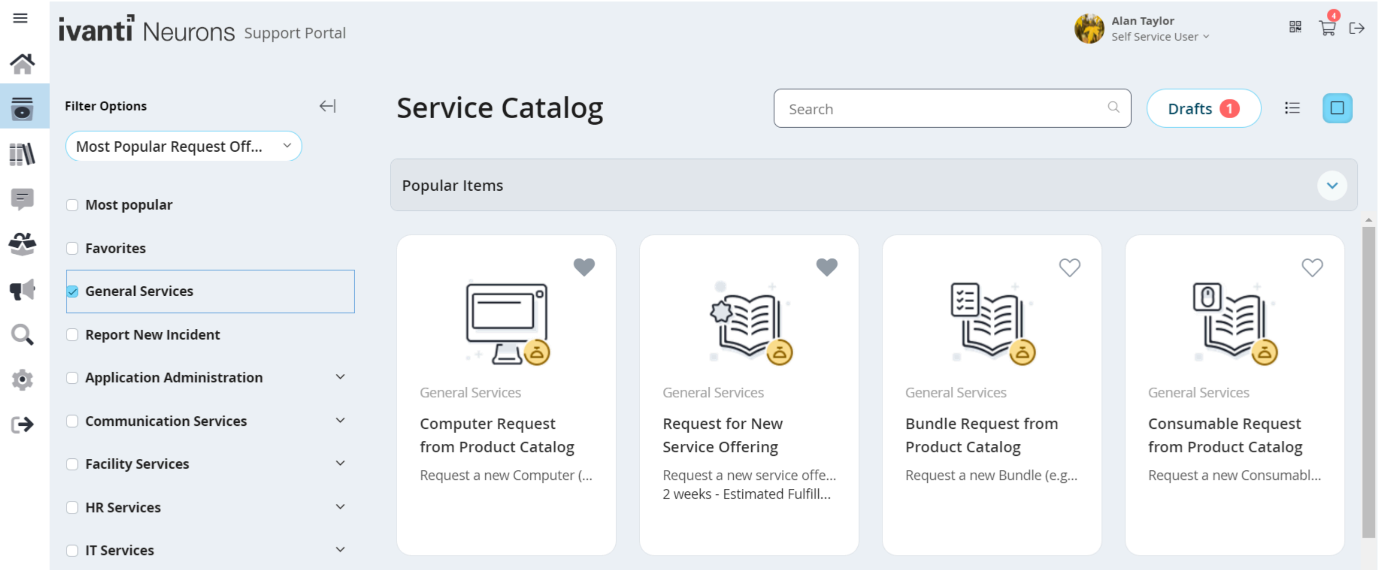
1. From the workspace menu, click **My Items**.
2. From the list view, open the incident.
3. Click **Close Incident** at the bottom of the form.
4. Click **Back to My Items List**. The incident status changes to **Closed**.

> After an incident is closed, you may receive a survey email requesting feedback about how effectively your issue was resolved. Your survey response will be stored with the incident.

4.2. Service Requests and Incidents

A service request is a request for a service, such as a conference room reservation, new email account, and so on. An incident is an interruption of service such as an account lockout, printer not working, and so on.

When you submit an incident or service request, it is logged with your company Service Desk or Help Desk, where it is processed. You can track the progress from your **My Open Items** list in the **Home** workspace or from the **My Items** workspace.



> Service Catalog choices and forms depend on how your company configured . See **Default Catalog Offerings** to know the list of Service Catalogs available out-of-the-box.

To submit a Service Request

1. From the workspace menu, click .
2. Browse by category in the left navigation pane. When you find the correct item to place a request for, select it in the main pane.
3. In the form displayed, enter information into the fields as needed. If it's more than one page, click **Continue** (in the bottom right) to progress through the form. Each form is different, depending on request type you selected.
4. After entering all the required information, click **Review & Submit**.
5. Review the information for accuracy. To make any changes, click **Edit/Back**.
6. Click **Submit**.

> Once the request is submitted, you can't go back, edit, or delete the form.

Track the request from your **My Open Items** list in the **Home** workspace or in the **My Items** workspace.

You may receive email updates from the Service Desk or Help Desk requiring additional information about the request. If this occurs, respond within the period of time indicated in the email; otherwise, the request will automatically close without resolution.

If you need to update an in-progress service request with a note or an attachment such as an image or a document, you can do so. For details, see **My Items**.

To report an incident

1. From the workspace menu, click **Service Catalog**.
2. In the left navigation pane, click **Report New Incident**. From the main pane, select the option that matches your problem. If your issue doesn't match the available options, click **New Incident**.
3. In the form displayed, enter information into the fields as required. Before doing so, browse the **Possible Solution** panel on the right to see if you can resolve your issue with one of the suggested fixes:
    - If a related article appears to match your issue, click the title to open it.
    - If the solution works, click **Resolve** (bottom right of the panel) to close the incident. If it does not work, then click **Back** (top left of the panel) to check other solutions.
4. If no solution works, fill out the fields as required.
    - In the **Description** field, provide details that thoroughly describe your problem.
    - In the **Urgency** field, select the level of urgency that this problem presents.
5. Click **Save Incident**.

Once saved, the issue becomes an incident with an ID that you can track in your **My Open Items** list in the **Home** workspace or in the **My Items** workspace.

You may receive email updates from the Service Desk or Help Desk requiring additional information about the incident. If this occurs, respond within the period of time indicated in the email; otherwise, the incident will automatically close without resolution.

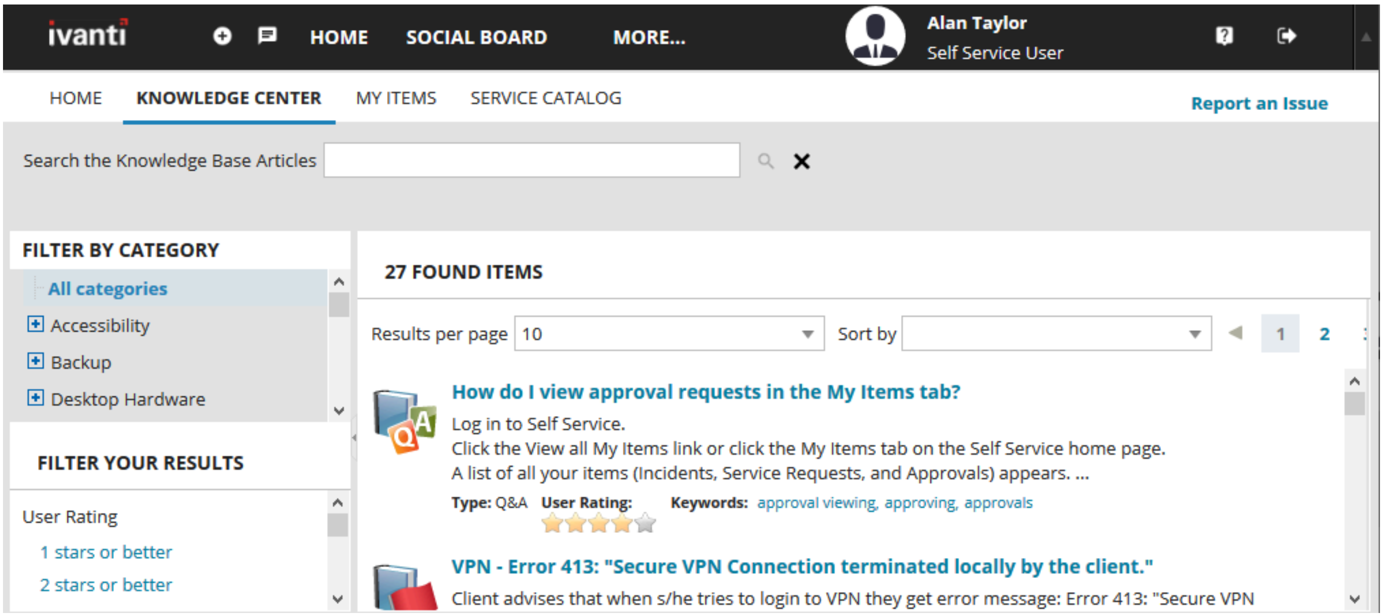
> To find partial matches, you can use ***** and **%** as wild cards in searches.

You can't edit an incident once it's logged, but you can update it with a note or attachment (such as an image, document, and so on). You can also close an incident, regardless of its current status. For details, see **My Items**.

4.3. Knowledge Center

You can use the Knowledge Center workspace to access all available articles that might help you solve an issue or find a workaround for one.

To access the knowledge articles, click **Knowledge Center** from the workspaces menu. A list view displays all published articles, click one to open it and click **Back to Search Results** to return to the list view.



Knowledge Center articles differ from FAQs in the following ways:

- They're created in the Knowledge Management system and have gone through an approval process before being published.
- They're rated by users. You can add your rating and comments to any article in the list.
- If you use an article to resolve your issue, an incident is automatically opened and closed so that statistics about issues and resolutions are kept current.

Articles are listed by category. You can search for, sort, and filter articles in the following ways:

- Search by typing a keyword in the **Search Knowledge Base Articles** field at the top of the page and clicking the icon. All articles matching the keyword is displayed.
- Sort articles by best rating, latest articles, and so on by using the **Sort by** drop-down list found at the top of the article list.
- Filter articles by category, user ratings, time period (created during last 7 days, 30 days, and so on), or knowledge type (document, patch, error message, and so on) in the left pane. To clear filters, click the icon next to the **Search Knowledge Base Articles** field.

To provide article feedback

You can rate and give feedback on knowledge articles.

1. From the workspace menu, click **Knowledge Center**.
2. A list of articles displays. Select an article to rate.
3. Scroll down to the bottom of the page. Under **Rate this article**, select the number of stars that this article deserves (one star being “not useful,” up to five stars of “exactly what I was looking for”).
4. Click **Yes** or **No** for Was this article helpful? You can also provide more feedback in the **Comments** section.
5. Click **Leave feedback**.

If you want to modify your feedback at any point, click **Change my feedback**, make the needed edits, then click **Change my feedback** again.

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4.4. Announcements, FAQs, and Alerts

Announcements and FAQs (Frequently Asked Questions) display in the Self Service portal's **Home** page, as well as their own workspaces. **Announcements** are messages sent out to the entire organization—all user roles can view announcements, but only user roles with the right access and permission can create announcements. **FAQs** are suggested solutions or workarounds to common questions that you can search before reporting an incident.

Alerts are global notices that include system or application errors (such as performance issues or application shutdowns), warnings (such as users unable to perform certain tasks), and informational messages (such as a printer has been moved).

You can use the **Search** workspace to search a list of all published FAQs, announcements, and knowledge articles from one place.

> Your ability to view announcements, FAQs, and alerts depends on the options your administrator has enabled for your user role.

To view announcements

1. From the workspaces menu, click **More** > **Announcements**. A list of announcements is displayed.
2. Click one to view the information in detail.
3. When finished, click **List View**.

To search for a specific announcement, enter a keyword in the **Search for Announcement** field (upper-right corner of the page) and click the icon or press the ENTER key. The matching results will display.

To browse all published FAQs

1. From the workspaces menu, click **More** > **FAQ**. A list of FAQs is displayed.
2. Click one to view the answer.
3. When finished, click **List View**.

To search for a specific FAQ, enter a keyword in the **Search for FAQ** field (upper-right area of the page) and click the icon. The application displays the matching results.

To view alerts

1. From the workspaces menu, click **More** > **Alert**. A list of all current alerts is displayed.
2. Click one to view the information in detail.
3. When finished, click **List View**.

To search all published FAQs, announcements, or knowledge articles

1. From the workspaces menu, click **Search**. A list of all available content—FAQs, announcements, and articles is displayed.
2. From the list, click a title to view the information in detail.

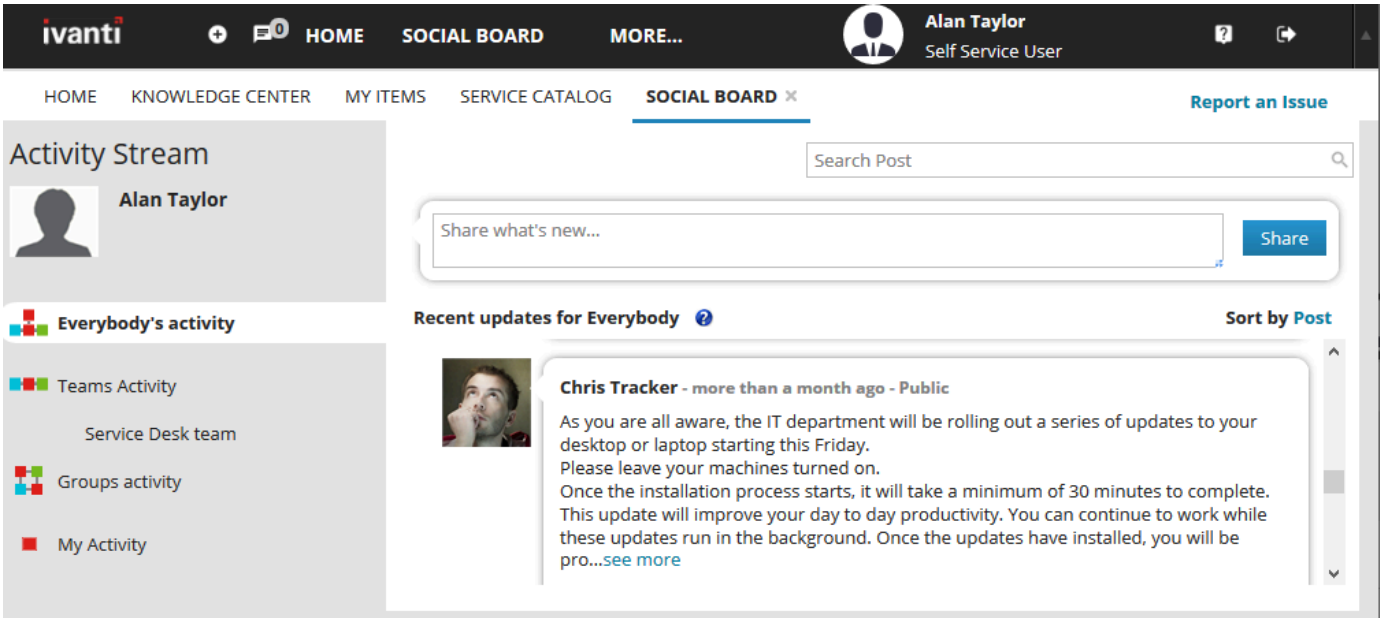
To find specific content, enter text in the **Search for** field (top left of page) and click the icon.

To filter the list, click a type (FAQ, announcement, or knowledge) or a time period (created during last 7 days, 30 days, and so on) in the left pane.

4.5. Social Board messages

Use the **Social Board** workspace to post and receive messages from other users, groups, teams, and assigned roles. Social Board can also be useful for:

- Notifying affected users of escalations, status updates, and business services that are out or degraded.
- Collaborating with others and providing peer-to-peer support within a managed community.



> Your ability to use the Social Board, as well as an optional instant messaging feature called the Chat Zone, depends on if your administrator has enabled it for your user role. For details, see Chat Zone.

Messages and comments

You can broadcast messages on the Social Board to all users (public messages), or to specific groups, teams, or individuals (limited messages). The messages will appear on their Home workspace as soon as they log in to the application.

To post a message to the Social Board

1. From the workspace menu, click **Social Board**.
2. Click within the **Share what's new** text box and type your message.
3. In the **Publish to** section, you can:
    - Broadcast a message to all users with the default setting of **Everybody**.
    - Send a message to specific groups, teams, or roles. Click **Add group**, select from the drop-down list, then click **Add**. Repeat to add other groups, teams, or roles.
    - Send a message to a specific person. Click **Add person**, search for the name of the user in the text box, then select that user. Click **Add**. Repeat to add other users.
    - Stop sharing messages with a user, group, team, or role by clicking the × icon next to the name. They'll no longer be part of your conversation (unless you add them back).
4. Click **Share** (right side of the text box) to send the message.

Also note the following:

- To respond to a message, type in the **Add a comment** field of the message and press the Enter key. Your comment will be shared with the users who received the original message.
- To search for specific messages, enter a keyword in the **Search Post** field in the top right corner of the page and press the Enter key or click the icon to view the search results.
- To filter the real-time stream of messages shared on the Social Board, click one of the filter criteria in the left-side Activity Stream pane:
    - **Everybody's Activity** – Messages published by all users.
    - **Teams Activity** – Messages published by teams you're part of.
    - **Groups Activity** – Messages published by groups you're a part of.
    - **My Activity** – All messages and comments published only by you.
- To delete a message or comment, click the × icon on the right side of the post or comment header, then confirm the delete. You can only delete messages or comments you have posted, not what others have posted.

Teams and groups

You can share conversations on Social Board with specific teams and groups. These are the rules for doing so:

- Teams are defined by the administrator, though anyone can create a group.
- Messages sent to a team go to everyone on the team. All team responses can be viewed by other team members.
- Messages posted to a group can be viewed by everyone in the group. Anyone with access to the Social Board can join a group that you’ve created. You cannot choose which members can belong to your group.
- You cannot delete a group, but you can leave a group. However, you cannot leave a group that you created.

To create a group in your Social Board

1. From the workspace menu, click **Social Board**.
2. In the Activity Stream pane, click **Groups activity** > **Manage Groups**. The **Manage Groups** window is displayed.
3. Click **Create new group**. The **Create new group** window is displayed
4. Enter information into the fields. For **Name**, enter a unique name, which is how this group will be identified by others. **Owner** is automatically taken from your login role and name. For **Description**, enter an optional description of this group.
5. Click **Save** to save the group, then **Close**.

To join a group

1. From the workspace menu, click **Social Board**.
2. Click **Groups activity** > **Manage Groups**. The Manage Groups window appears.
3. If you've never joined a group, two buttons appear. Click **Join a group**. If you've already joined a group, skip this step.
4. From the **Public Groups** tab, click **Join** within the group box.
5. Click **Close**.

To leave a group

You cannot delete a group, but you can leave a group. However, you cannot leave a group that you created.

1. From the workspace menu, click **Social Board.**
2. Click **Groups activity** > **Manage Groups**. The Manage Groups window appears with your current groups.
3. Within the group to leave, click **Leave**. The **Leave Group confirmation** box is displayed.
4. Click **Yes** to leave the group. The group no longer appears under the **My Groups** tab.

The What is New on Social Board icon

You can use the **What is New on Social Board** icon as a shortcut to open unread messages and post new messages on the Social Board. The icon shows the number of unread messages you have and displays in the header bar of each portal workspace, no matter which one is open.

The icon has the following features:

- The number of unread messages is shown next to the icon. If the Social Board has not been activated, you do not see a number. (Click the icon to activate the Social Board.)
- The message counter increments each time a new message is posted, but it does not include your own messages.
- By default, the Everybody's Activity area and your comments are updated instantly, while the Teams Activity area is updated every 5 minutes. The maximum number of notifications shown is 10.
- To clear the message counter, click the icon to open the message window and click **Clear & Close**.

4.6. Chat Zone

The Chat Zone is an instant messaging feature that is part of the **Social Board** workspace. Use the Chat Zone to communicate directly with other users. You'll see the Chat Zone only if your administrator has enabled it for your user role.

The following are features of the Chat Zone:

- If it's enabled, the Chat Zone automatically appears on the right side of the Social Board workspace. Chats sent to you are not displayed to you unless you open either the **Social Board** workspace or the Chat Zone.
- You can have up to ten different conversations in the Chat active at one time.
- After you've opened the **Social Board** workspace (which activates the Chat Zone), you can close the workspace and continue to send and receive chats. To hide/show the Chat Zone, toggle the sidebar handle.

To chat with other users

1. From the workspace menu, click **Social Board**. If enabled, the Chat Zone automatically displays on the right side of the page, if not, contact your administrator.
2. To begin a chat, click **Start New Conversation** within the Chat Zone. A chat window is displayed.
3. To add users, do the following:
    - Click **Add Person**.
    - In the text box that appears, enter the name of the person to chat with.
    - Click **Add**. Repeat as needed—there is no limit to the number of users that you can include.
4. In the bottom message area, type a message.
5. Press the ENTER key to publish the message. Users cannot see your message until you publish it. Your message appears below the list of recipients:
    - **Public** conversations have a white background.
    - **Private** conversations have a blue background.
6. To minimize the conversation, click the conversation header. Click the header again to toggle open.
7. To remove conversations, click the **Remove Conversation from the Chat Zone** icon.

To chat with a team, group, or role

You can have conversations at a team, group, or role level in the Chat Zone (as well as in the Social Board). You can only chat with teams, groups, or roles of which you are a member. Before starting the chat, you must first start the conversation in the Social Board.

1. From the workspace menu, click **Social Board**.
2. Enter a message in the text box.
3. Click **Add group**.
4. Choose a team, group, or role from the drop-down list, then click **Add**.
5. Click **Share**. The message appears on the Social Board and the conversation is submitted to the team.
6. Click the chat icon in the message window to move the conversation into the Chat Zone. You can continue chatting with the group from the Chat Zone.

To move the Chat window

After publishing a conversation, you can position the chat window over other windows to continue monitoring the conversation.

1. Within the conversation header, click the pop-out arrow ↗ icon.
2. To move the Chat window, drag the header to another location.
3. To return the window to the Chat Zone, drag and drop it back into the Chat Zone. If you click the close icon, the conversation is removed from the Chat Zone.

4.7. Working with Favorites

Using the Favorite option you can easily access your most frequently accessed Knowledge Articles, Service Catalogs, and Service Requests by adding them to Favorite.

> If the Favorite option is not available for you, then it has not been enabled by your . Reach out to your to get it enabled.

Adding and Removing a Favorite

To add a record to Favorites

1. Log in to portal.
2. Open the Knowledge/Service Catalog/Service Request workspace.
3. Open a record or from the list view itself click the **Add to Favorite** icon ♡ for any of the record that you wish to add to Favorite.

To remove a record from Favorites

4. Open the Knowledge/Service Catalog/Service Request workspace.
5. Open a record or from the list view itself click the **Remove from Favorite** icon ♥ for any of record that you wish to remove from Favorites.

> - The Favorite option is also available in the **Search** workspace. You can add or remove records as Favorite from the **Search** workspace as well.
> - When you click the **Add to Favorite** icon ♡, the icon toggles to **Remove from Favorite** icon ♥.

ivanti

5. Ivanti Neurons for Facilities - Self Service User

Minimum Version: 2022.4

2022.4 provides Self-Service Users with enhanced facilities functionality for their existing system.

When logged on to with 2022.4, a Self-Service User can:

- Reserve available conference rooms, facilities spaces, and cubicles.
- Select multiple facilities assets that are assigned to them and that they wish to take with them when moving to another facility.
- Facilities Asset Request feature is improved for better user experience and usability.

All of the above mentioned enhancements are available in the Service Catalog Facility Services section.

For general instructions on making a service request, see **Service Requests and Incidents**.

For information on all request features you can select in the service catalog, see **Default Service Catalog Offerings**..

The request features described below are new or improved for 2022.4.

Employee Move Request

Request to move from one facility to another, including any assets that are assigned to the requester.

To create an Employee Move request:

1. In the **Home** workspace of the Self-Service portal, select **More Services**.
2. Select the **Facility Services** category, and then select **Employee Move Request**.
3. See **Employee Move Request** in Default Service Catalog Offerings for details on completing the request.
4. Click **Submit** when all fields are completed.

Facility Reservation

Make a reservation for a conference room, cubicle or facilities space, including catering and required equipment.

To make a reservation:

1. In the **Home** workspace of the Self-Service portal, select **More Services**.
2. Select the **Facility Services** category, and then select **Facility Reservation**.
3. See **Facility Reservation Request** in Default Service Catalog Offerings for details on completing the request.
4. Click **Submit** when all fields are completed.

Facilities Asset Request

Request a new facilities asset from the Product Catalog.

To request a facilities asset:

1. In the **Home** workspace of the Self-Service portal, select **More Services**.
2. Select the **Facility Services** category, and then select **Facilities Asset Request**.
3. See **Facilities Asset Request** in Default Service Catalog Offerings for details on completing the request.

4. Click **Submit** when all fields are completed.

6. Ivanti Neurons for GRC - Self Service User

Minimum Version: 2023.2.

provides Self Service Users with enhanced Governance, Risk and Compliance (GRC) functionality for their existing system.

> **Important:** The following features are available in the Ivanti Neurons for GRC application, or as part of the Neurons for ITSM Enterprise paid enhancement package.

When logged on to with 2023.2, a Self-Service GRC User can:

- Submit a request for Vendor Onboarding.

The above mentioned enhancement is available in the Service Catalog General Services section, and is only available to users. All other default Self Service requests are also available.

For general instructions on making a service request, see **Service Requests and Incidents**.

For information on all request features you can select in the service catalog, see **Default Service Catalog Offerings**.

The request features described below are new or improved for 2023.2.

Vendor Onboarding Request

Submit a request to on-board a vendor for services or products they provide.

To create a Vendor Onboarding request:

1. Log in to the Neurons Self-Service portal.
2. Select **IT Services**, and then select **Service Catalog**.
3. Select the **General Services** category, and then select **Vendor Onboarding**.
4. See **Vendor Onboarding Request** in Default Service Catalog Offerings for details on completing the request.
5. Click **Review & Submit**:
   - If the Vendor details are correct click **Submit**.
   - If further edits are required, click **Edit**, make required changes and re-submit.

When submitted the Vendor Onboarding request is sent for approval, and **Status** is marked as Submitted.

To view the submitted request:

1. Select the **Home** icon in the left column.
2. Select **My Items** in the Neurons Service Portal Home page.
3. Select the item in the **My Items** list.

7. Enterprise Self Service Welcome Page

The Enterprise Self Service Welcome page is a hub that has all your Self Service content organized based on department. From here, you can navigate to the Self Service Mobile portal by selecting the department such as IT Services, Human Resources, Facilities Services, or Security Operations that you wish to access.

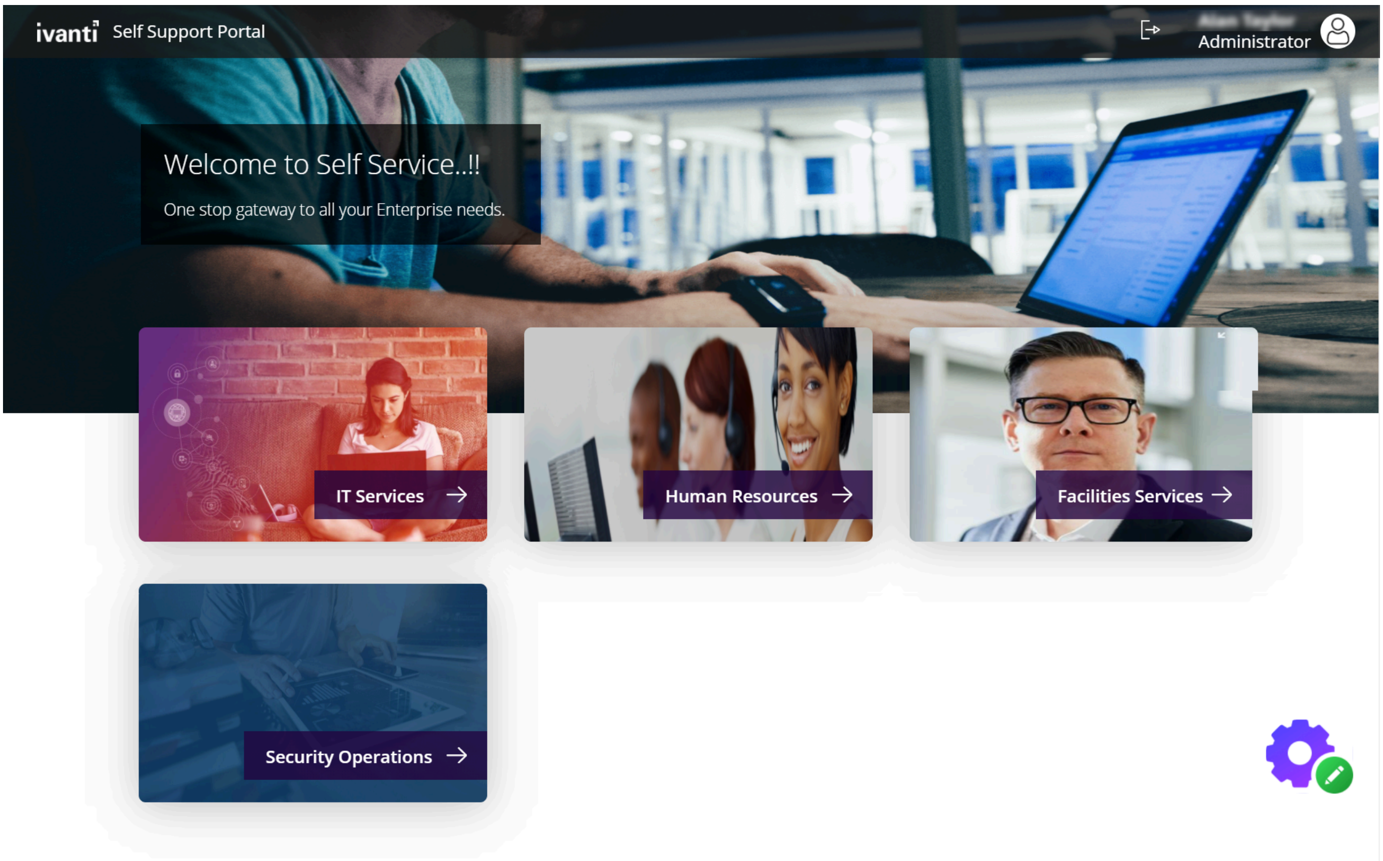
For example, if you select **Human Resources** on the Enterprise Welcome page, you are redirected to the Self Service Mobile portal, but the content (**Service Catalogs**, **Announcements**, **FAQs**, **My Items**, and **Knowledge Articles**) displayed in it will be specific to Human Resources. Similarly, if you select **Security Operations**, content for Security Operations is displayed.

This feature is available only if your organization's administrator has enabled it for you. Reach out to your organization's administrator if you have any concerns or questions.

When designing the Enterprise Welcome page, follow the below image/logo format, size, and resolution recommendations:

Element	Format	Size Limit	Resolution
Logo	.svg	1 MB	-
Background Image	.jpg, .png	2 MB	1920 (width) x 550 (height)
Card logo	.svg	1MB	-

Sample image of the Enterprise Self Service Welcome page



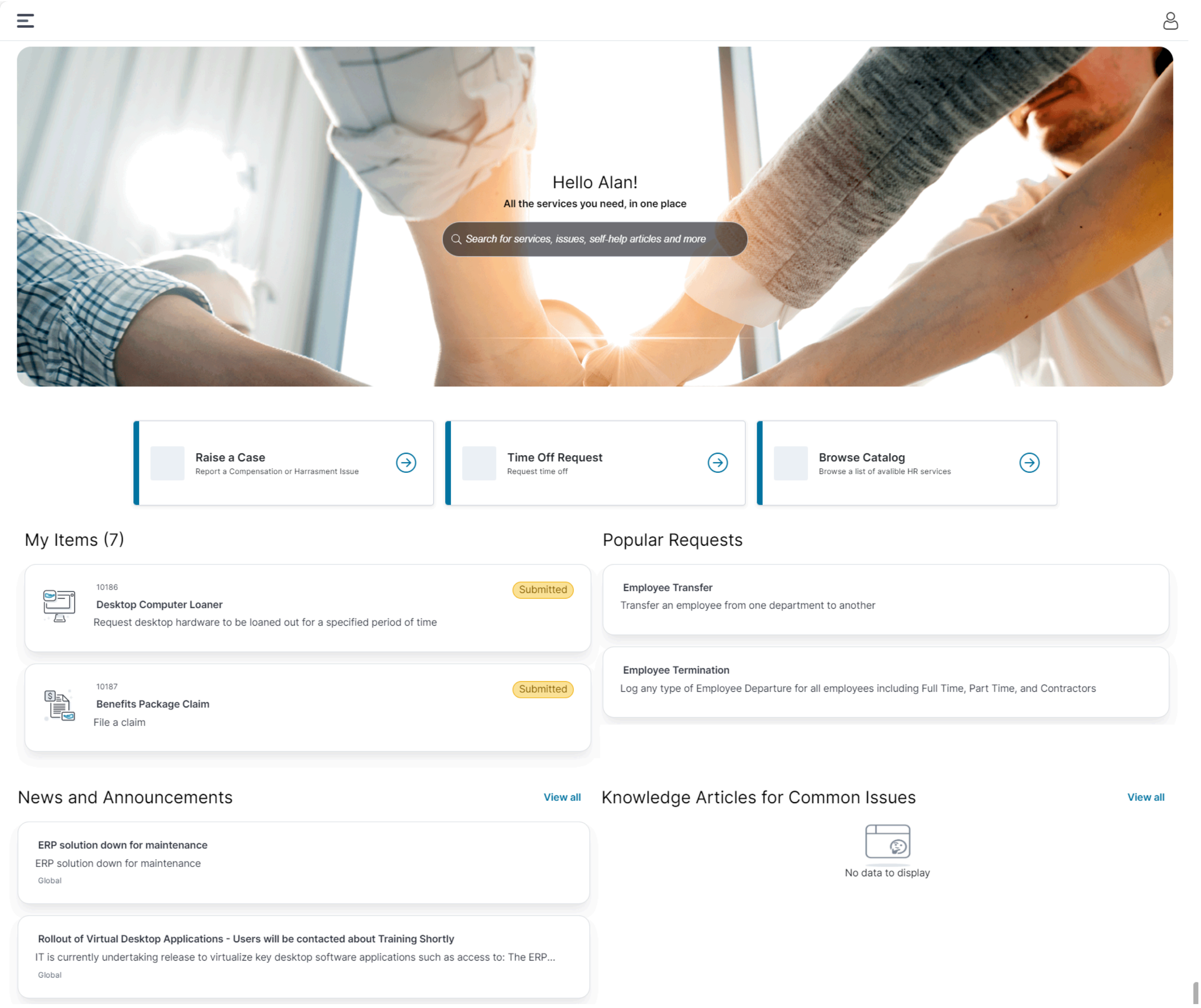
Changing the screen resolution or zooming beyond 200% can cause icons and text to display incorrectly, even when the **Adaptive** option is enabled and the browser is refreshed.

8. Human Resources - Enterprise Landing Page

The V3 Enterprise Landing Page is extended to Human Resource portal. This aligns with the modern design that the V3 offers. Users can use the following out-of-the-box components:

- **Default Banner** - You can customize the banner as per your liking.
- **Search Bar** - Use it to search the portal using a keyword.
- **Workspace tiles** - Click on a tile to go the selected workspace.
  - **Raise a Case**
  - **Time Off Request**
  - **Browse Catalog**
- **My Items** - Displays all your raised cases, requests, and incidents across IT, HR, and Facilities.
- **Popular Requests** - Displays the most requested offering.
- **News and Announcements** - Displays all news and announcements from the organization.
- **Knowledge Articles for Common Issues** - Displays the most common knowledge articles.

HR - Enterprise Landing Page



> Existing users should enable the Enterprise Landing Page to use the HR Enterprise Landing Page. For information on how to enable, refer to **Configuring the Enterprise Self Service Welcome Page** and **Working with Page Settings - Enterprise Landing Page**.

8.1. Working with HR Enterprise Landing Page

The following capabilities are available in the HR Enterprise Landing page:

Create and submit an HR Case

1. Log in to with a role that has **HR Enterprise Landing Page** enabled.
2. Click the **Raise a Case** tile.
3. Enter the following details:
    - **Summary** and **Description**.
    - Select the **Priority** from the dropdown list.
    - Select the **Confidential** checkbox if you would like to keep the case confidential.

    Only HR members who are added to the Confidential group will be able to view your case if the **Confidential** checkbox is selected.
4. Click **Submit** to log your case.

Request Time Off

1. Log in to with a role that has HR Enterprise Landing Page enabled.
2. Click the **Request Time Off** tile.
3. Enter the following details:
    - **Start Date**, **End Date**, and **Total Hours of Time Off**.
    - Select the time off type from the **Type** dropdown list.
    - Select the **Paid** checkbox if the time off is paid.
    - Optional - enter additional information in the **Comments** section if required.
4. Click **Request Now** to submit.

Browse Catalog

1. Log in to with a role that has **HR Enterprise Landing Page** enabled.
2. Click the **Browse Catalog** tile.
3. Select from the list displayed.

    or
4. Use these options:
    - **Filter by** - to filter the catalog by **Most Popular** and other options.
    - **Sort by** - to sort by ascending, descending, or by category group.
    - **Drafts** - to displays your saved drafts if any.

9. Self Service Mobile Portal

If you are assigned the **Self Service Mobile** user role, you can view the portal on a variety of iOS and Android devices, such as smart phones and tablets. The portal is a web-based user interface that is similar to the classic application, except the pages are sized to display appropriately on a mobile device.

Google Chrome is the recommended browser for viewing the portal. The following browsers are not supported: Microsoft Internet Explorer 8 (IE8), Microsoft Internet Explorer 9 (IE9), or native/embedded Android browsers.

If you're using a smart phone to access the portal, you will first need to download the app for free on your device from either the Google Play Store or Apple App Store.

- When you use on mobile devices including tablets, only mobile-based user roles are available. If you want to login to non-mobile based user roles, use your desktop or a laptop.
- The user interface for is designed to be flexible, supporting desktop, tablet and mobile form factors. When viewing in desktop, it is recommended to view in 1280 × 1024 resolution.
- When the mobile app is idle for a longer time, you will be logged out. This is based on the SSO session timeout configuration.

Accessing the Self Service Mobile Portal

When the Enterprise Self Service Welcome page is Enabled

When you log in to as a Self Service Mobile user, the Enterprise Self Service Welcome page is the landing page. You will need to select a department to be able to access the Self Service Mobile portal. The Self Service Mobile portal will display content (**Service Catalogs**, **Announcements**, **FAQs**, **My Items**, and **Knowledge Articles**) specific to the department you selected.

For example, if you select **Human Resources** on the Enterprise Self Service Welcome page, you are redirected to the Self Service Mobile portal which displays content specific to Human Resources only.

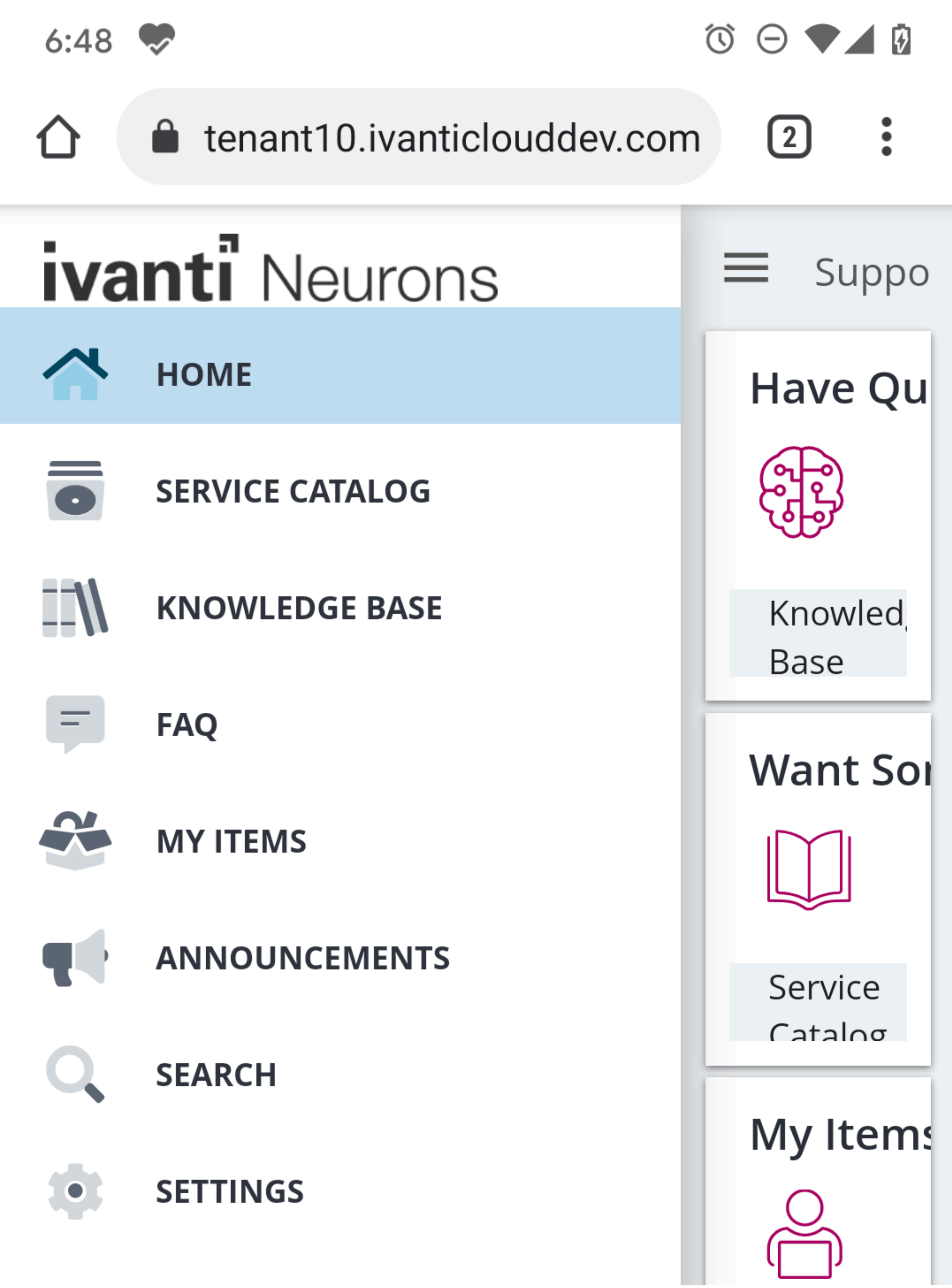
When the Enterprise Self Service Welcome page is not Enabled

When you log in to as a Self Service Mobile user, the Self Service Mobile portal is the landing page. All Self Service content is available here without any department-based categorization, unlike when the Enterprise Self Service Welcome page is enabled.

Navigating the Self Service Mobile Portal

Once you are logged into the portal, you will notice that the interface may have a different look and feel from the image below. Based on how your administrator has setup and the device you're viewing it from, the colors and the exact modules might not be the same for all user roles.

All procedures described in the Self Service help also apply to the portal, with slight differences. For example, instead of clicking items and scrolling the window, you may need to tap and swipe the screen when performing actions.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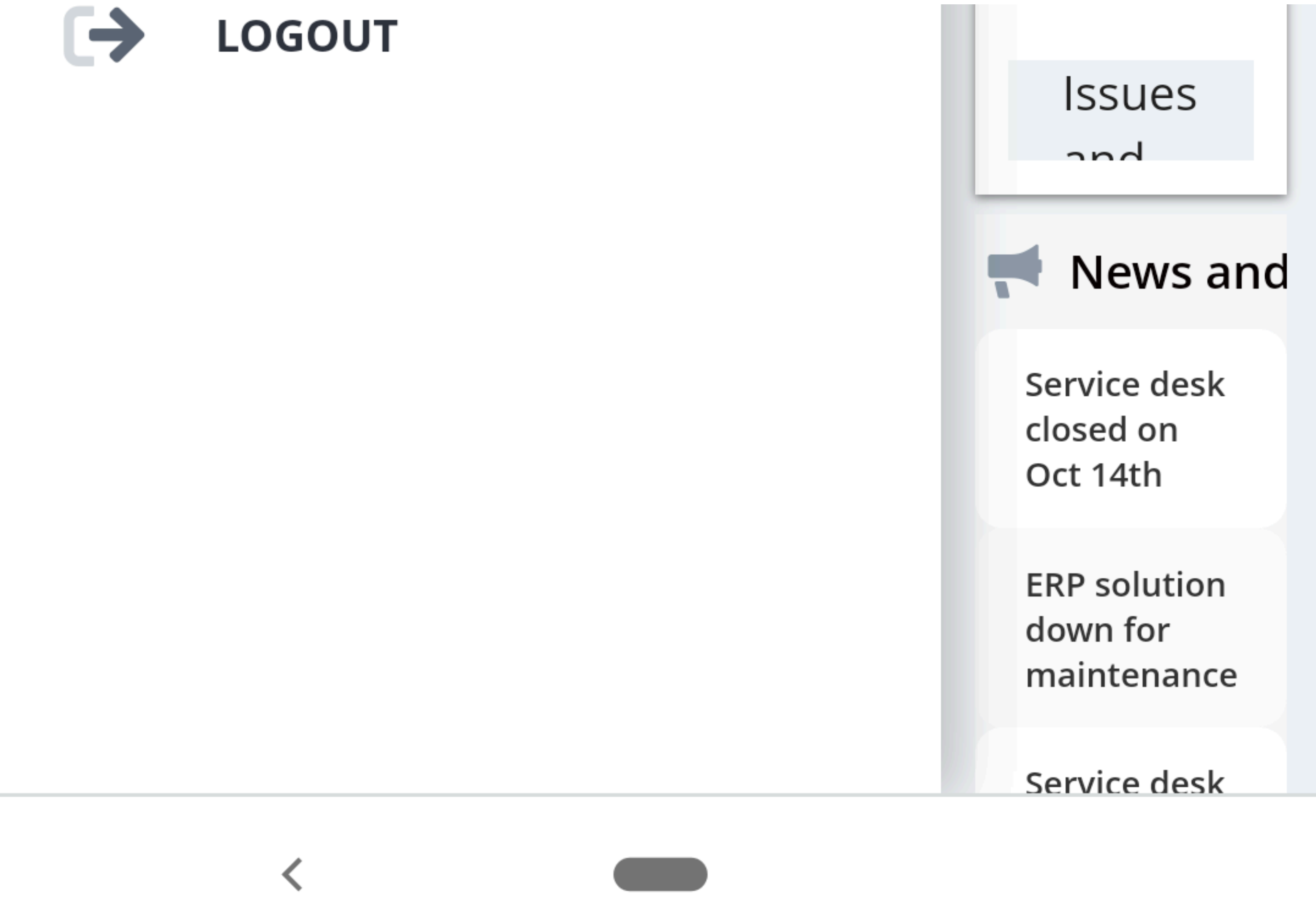


Navigate the portal using the left menu panel:

– Expand or collapse the menu panel. On smart phones, the menu closes after you select an option.

– The default page when you log in to the portal—use it to access the Service Catalog, browse knowledge articles, access your submitted incidents and requests, and so on.

– Open the Service Catalog to submit a service request or report an incident. For details, **Service requests and incidents**.

– View all published knowledge articles. Click Search icon to find specific titles or content by using keywords. Click to focus the search by using one of the drop-down lists for filtering or sorting.

– Find answers or solutions to FAQs before reporting an incident. Search for specific titles or content by entering keywords. Focus the search by filtering from the **All Categories** drop-down list.

– View all incidents or service requests created by you (and for some user roles, assigned to you). Search for specific incident titles or content by using keywords. Focus the search by using one of the drop-down lists for filtering or sorting.

– View announcements, which are messages sent out to the entire organization. Click Search icon to find specific announcements by using keywords.

– Use keywords to search for items that are configured for your environment—these usually include announcements, FAQs, and knowledge articles. You can filter results by Categories and Date and sort by ascending or descending order.

– Change your personal settings, as allowed by your administrator. You may have privileges to change the default language of the application, default login role, and so on.

– Log out of the application.

9.1. Reporting Incidents and Submitting Requests

You can report incidents or submit requests/raise a ticket from the portal. A service request is a request for a service, such as a conference room reservation, or a new email account. An issue is an interruption of service such as an account lockout, or printer not working.

On some devices, the Service Catalog is viewable as a list or in tiles. Toggle the view by tapping the list view icon or the tile view icon in the upper-right area of the page. Note that the tile view displays items in large tiles, which take up more space and list fewer items on the screen.

When filling out a service request, you have the option of saving it as a draft to complete and submit later. Un-submitted requests will appear as Drafts at the top right of the page.

Using the Service Catalog workspace

Use the Service Catalog workspace to submit a service request or report an issue/incident. The Service Catalog workspace lists all the Services offered by your organization.

To browse and find Service Offerings, you can use one of the option:

- **Filter by category**: Select an option from the **Filter Options** list. You can filter by department, **Most Popular**, and **Favorite** (lists services that are marked as favorite).
- **Search**: Enter a keyword in the Search bar and press ENTER, records matching the keyword are displayed.

Working with the Favorites

The Favorites category lists all services that you have added to the Favorites, they appear in the top of the list.

- To view all services added to the Favorites, select the Favorites option from the **Filter Options**.
- To add a service to the Favorites, from the Service Catalog workspace, tap the Favorites icon. The Favorites icon changes to , you will get a pop-up message that the selected service is added to Favorites and the service is moved to the top of the list along with other services that are already added to Favorites.

> The Favorites feature is available only in the portal and if your administrator has enabled it.

To create a service request

1. Tap the Service Catalog icon.
2. Tap the drop-down list at the top of the page to view available categories. On smart phones, you may have to tap the filter icon in the upper right to access this list.
3. Select a category, then swipe through the listed offerings to find the one you want. Tap the offering, then tap **Request**. A form is displayed.
4. Fill in the form fields, then tap **Review & Submit**.
5. Review the accuracy of the information, then tap **Save for Later**, **Submit**, or **Edit**. Saving for later displays the request as a draft at the top right of the page. When you're ready to submit the draft, open it and submit it at that time.

To report an incident

1. Tap the Service Catalog icon.
2. Tap the drop-down list at the top of the page, then tap **Report New Incident**. On smart phones, you may have to tap the filter icon in the upper right to access this list.
3. Swipe through the listed issues to find one that matches your problem. Tap the issue, then tap **Request**. A form opens.
4. Fill in the form fields. If it's configured, a **Related Items** panel will appear listing FAQs or articles related to your issue. Those documents may provide a solution—if so, tap **Resolve**. If not, close the panel, fill in the form, and tap **Save Incident**.

To update a logged incident

To help the Service Desk or Help Desk resolve an incident, you may need to add a note or attachment to it. You can only do so after logging the incident. Once you add a note or an attachment, it becomes a permanent part of the incident record that you can't delete.

From an iOS device, you can attach only one item. Depending on your application configuration, you may be limited to the types of files (such as .MOV) that you can attach.

1. Tap the icon to open **My Items**. A list of your open items appears.
2. Find the logged incident, then tap to open.
3. To attach a file or photo: In the **Attachments** section, tap **Browse** to find a file. Select the file and tap **Save**. Note that the attachable files you see will depend on your installed apps or the viewing capabilities of your device.
4. To add a note: In the **New Notes** section, tap the text box and enter a note. Once finished, tap **Save**.

> **Attaching a photo using an iOS device's camera**
> Privacy settings on iOS devices using Safari may prevent you from using the camera function. The camera opens, but the screen remains blank and only the Cancel button is enabled. If this occurs, re-enable the camera function by going to **Settings > Privacy > Camera** on your Apple device. Turn on access to the camera for Safari.

9.2. Chat with Support

You can either use the in-build chat feature of Neurons for ITSM or use Microsoft Teams to instantly message the Support/Service Desk Analyst team to help solve your issues or answer your questions in a one-on-one chat. You can also create incidents from the chat.

> If this feature is not available for you, your administrator might not have enabled it. Reach out to your organization's administrator to get it enabled.

Using Neurons for ITSM's built-in Chat

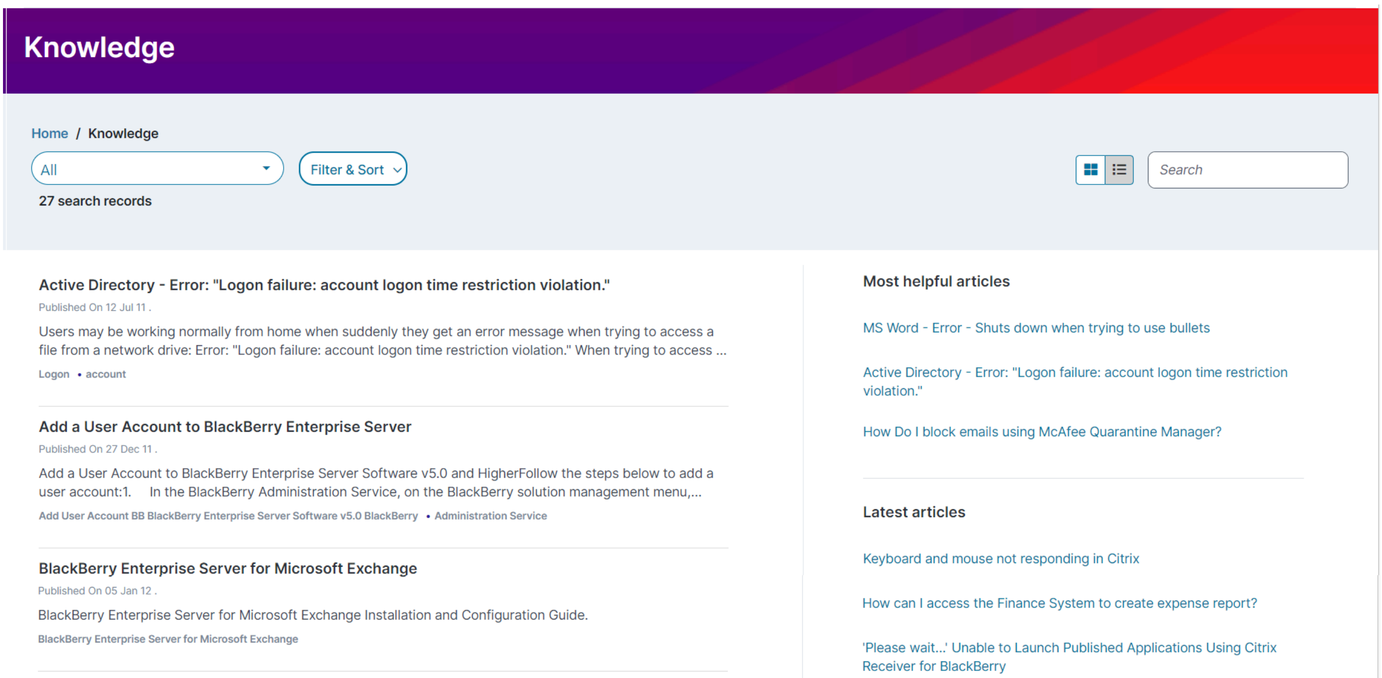
1. Tap the Chat with support icon .
    - A new chat window is displayed with the message "We are online" when the Support/Service Desk Analyst staff is available. If not, the message "Chat is unavailable at this time!" is displayed.
    - Once a Service Desk Analyst is assigned to your chat session, you will see the message "Connected to <Service Desk Analyst name>" in the chat window.
2. Type your query or the issue you are facing in the text box and tap the send icon .

    The Service Desk Analyst will reply to your query or issue. In case it cannot be solved through the chat, an Incident will be raised and the Incident number will be displayed on your chat window.

> If you stay idle on the chat for a long time, you will be logged-off after two warnings.

9.3. Knowledge Base

The **Knowledge Base** workspace allows you to access all the articles available in Knowledge Center to find a solution or workaround for the issues you are facing. The workspace displays the most helpful and latest articles so help to to troubleshoot your queries.



To mark an article as Favorite

Marking a knowledge article helps you to quickly find your most referred to articles . The ones marked as favorite appear at the top of the list.

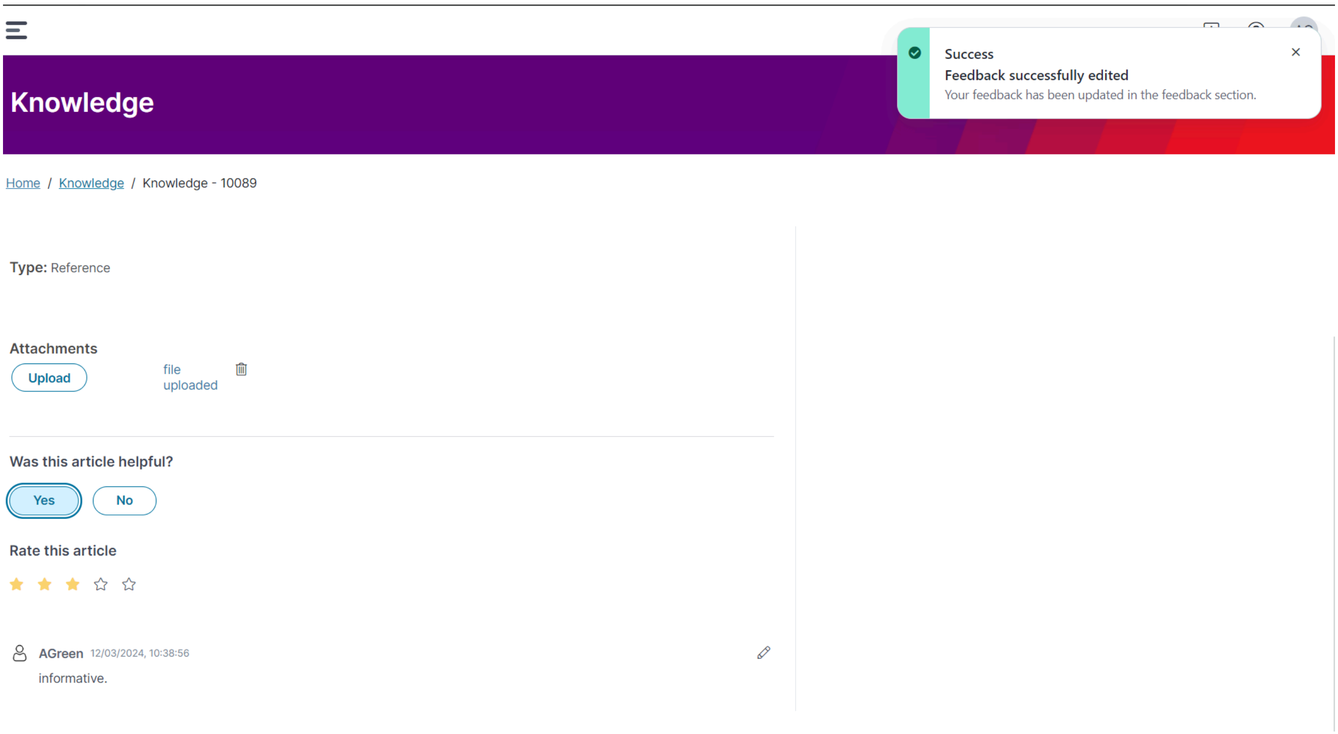
From the Knowledge Base workspace, tap the Favorite icon ♡ for a knowledge article.

The icon changes to ♥, a pop up message appears with a message that the selected knowledge article is marked as Favorite and the article is moved to the top of the list along with existing articles that are marked as Favorite. The Favorite feature is available only if your administrator has enabled it.

To provide feedback for an article

You can rate and give feedback on knowledge articles.

1. From the workspace menu, click **Knowledge Base**.
2. Select an article to rate.
3. Under **Rate this article**, select the number of stars that reflect your rating (one star being "not useful," up to five stars for "exactly what I was looking for"). A pop up message displays with a nessage that your rating for this article is submitted.
4. Click **Yes** or **No** under Was this article helpful? You can also add feedback in the **Feedback** section.
5. After entering your feedback, click **Submit feedback**.
6. Optional. If you want to modify your feedback at any point, click the **Edit** icon make the needed edits, then click **Update feedback**.



To view Knowledge articles

1. Log in to Neurons for ITSM.
2. From the workspaces menu, click **Knowledge**. A list of knowledge articles are displayed.
3. Click on a knowledge article to view the information.

To search for a specific knowledge article, enter a keyword in the **Search** field (upper-right corner of the page) and press the ENTER key. The matching results are shown.

To view using Filter by and Sort by filter

1. Log in to Neurons for ITSM.
2. From the workspaces menu, click **Knowledge**.
3. Click **Filter & Sort** drop-down list. The **Filter by** and **Sort by** options appear in the drop-down list. You can use the **Sort by** option to view the articles in ascending or descending order, and based on Title, Description, Published Date, and Keywords.
4. Select the filter option, and click **Apply**. The knowledge articles based on your search criteria appear.

To view using Favorite Search filter

1. Log in to Neurons for ITSM.
2. From the workspaces menu, click **Knowledge Base**.
3. Click **All** in the drop-down list, and select the favorites knowledge articles created only to view specific articles from a list of views.

10. Self Service Management Portal v3

Version*:   2023.3 onwards*

Role: User

The Self Service Management Portal v3 offers a streamlined interface that lets users track service requests. Users with the Self Service role access FAQs, announcements, knowledge articles, and chat with the Support team.

> Only users with administrator role can add and configure a workspace for a role.

The Self Service Management Portal v3 provides the following (out-of-the-box) OOTB workspaces:

- Service Catalog
- My Items
- Knowledge
- Announcements

Only users with an **Administrator** role can add and **Alerts** and **FAQs** workspaces and enable to display them on the home page.

> The mobile app logs you out after a period of inactivity, based on the SSO session timeout configuration.

10.1. Logging in to the Self Service Management Portal

To log in, you must be assigned the Self Service user role. Ask your administrator for the login URL.

1. To login:

   a. **On a mobile device**

   Enter the login URL provided by your administrator in the **Tenant URL** field. or tap **Scan Tenant QR**, and allow camera access when prompted.

   b. **On a desktop application**

   Open the browser and enter URL provided by your administrator.

   The login page is displayed.

2. Enter your **username**, and **password** and then tap or click **Login**.
3. Select the **Self Service** role and tap or click **Submit**.

   The Self Service UI is displayed.

Changing your Profile Settings

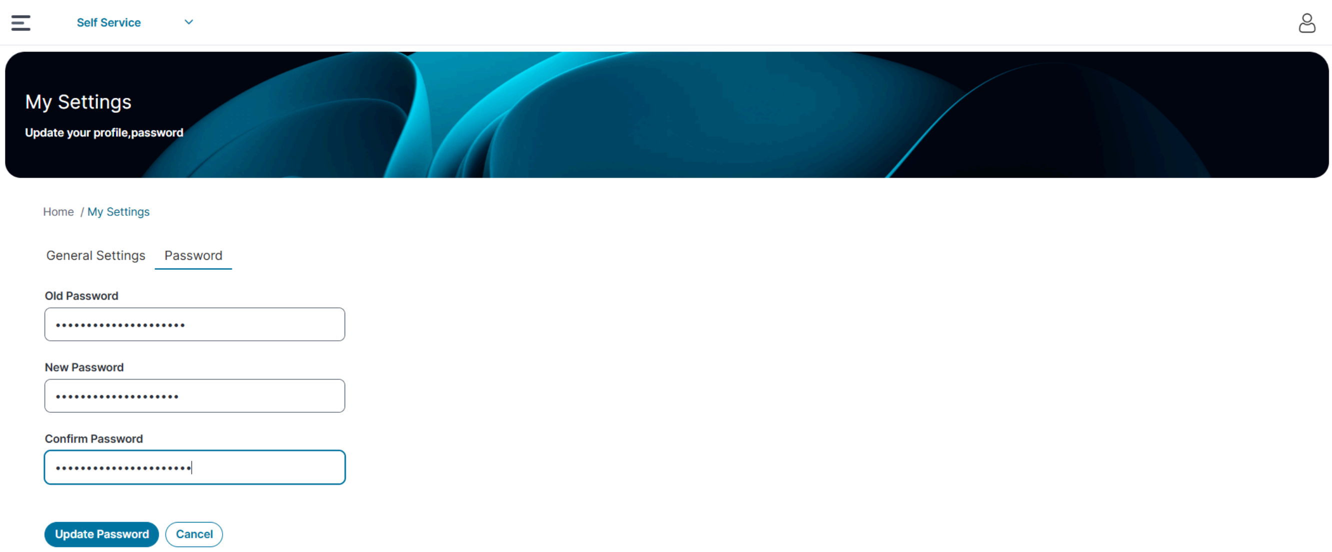
You can update your password, language, and profile picture through the **Profile Settings** menu.

Change your password

> Passwords are case sensitive.

1. Log in to the Self Service Management portal.
2. Click icon and from the dropdown list, click **Profile Settings**.

   The **My Settings** page is displayed.



3. On the **My Settings** page, select **Password**.
4. Enter your **Old Password**, **New Password**, and **Confirm Password**.
5. Click **Update Password**.
6. Log out, and log in again using your new password.

Reset your password

> This feature is only available for users authenticated through internal authorization. It does not work for external login providers.

1. On the login page, click **Forgot password?**.
2. Enter your **username** or **email address** and then click **Submit**.

   A one-time reset link is sent to your registered email address.

3. Open your email and click the reset link. This link expires in **20 minutes** or as configured by your administrator.
4. Click the reset link.

   The **Reset Password** page is displayed.

5. Enter your **User ID**, **New Password** and **Confirm Password**.
6. Click **Submit**.

   If you are unsure of your **User ID**, contact your organization's administrator.

Change your language preference

The default language is English (United States). If your administrator provides permission, you can change the interface language. The selected language remains same until you change it.

1. Click icon and from the dropdown list, click **Profile Settings**.

   The **My Settings** page is displayed.

2. Select **General Setting**.
3. Select the language, and then click **Save Changes**.

   The application refreshes with the selected language.

Update your profile picture

1. Click icon and from the dropdown list, click **Profile Settings**.

   The **My Settings** page is displayed.

2. Select **General Setting**.
3. Click profile picture icon.

   The **Edit Profile** dialog box is displayed.

4. In the **Edit Profile** dialog box, click **Select File** select an image file and click **Save**.

   The profile picture appears next to your username.

Change your role

1. Click icon and from the dropdown list, click **Profile Settings**.

   The **My Settings** page is displayed.

2. Select **General Setting**.
3. Click **Change Role**. From the dropdown list, select the role.

   The Home page updates based on the selected role.

10.2. Navigating Self Service Management Portal

Overview

The Self service management portal is a centralized platform that allows you to request services, report issues, access personalized content, and find support resources, all in one place. Designed for ease of use, the portal streamlines common IT and business related tasks, helping you to resolve issues quickly and stay informed.

Key Capabilities

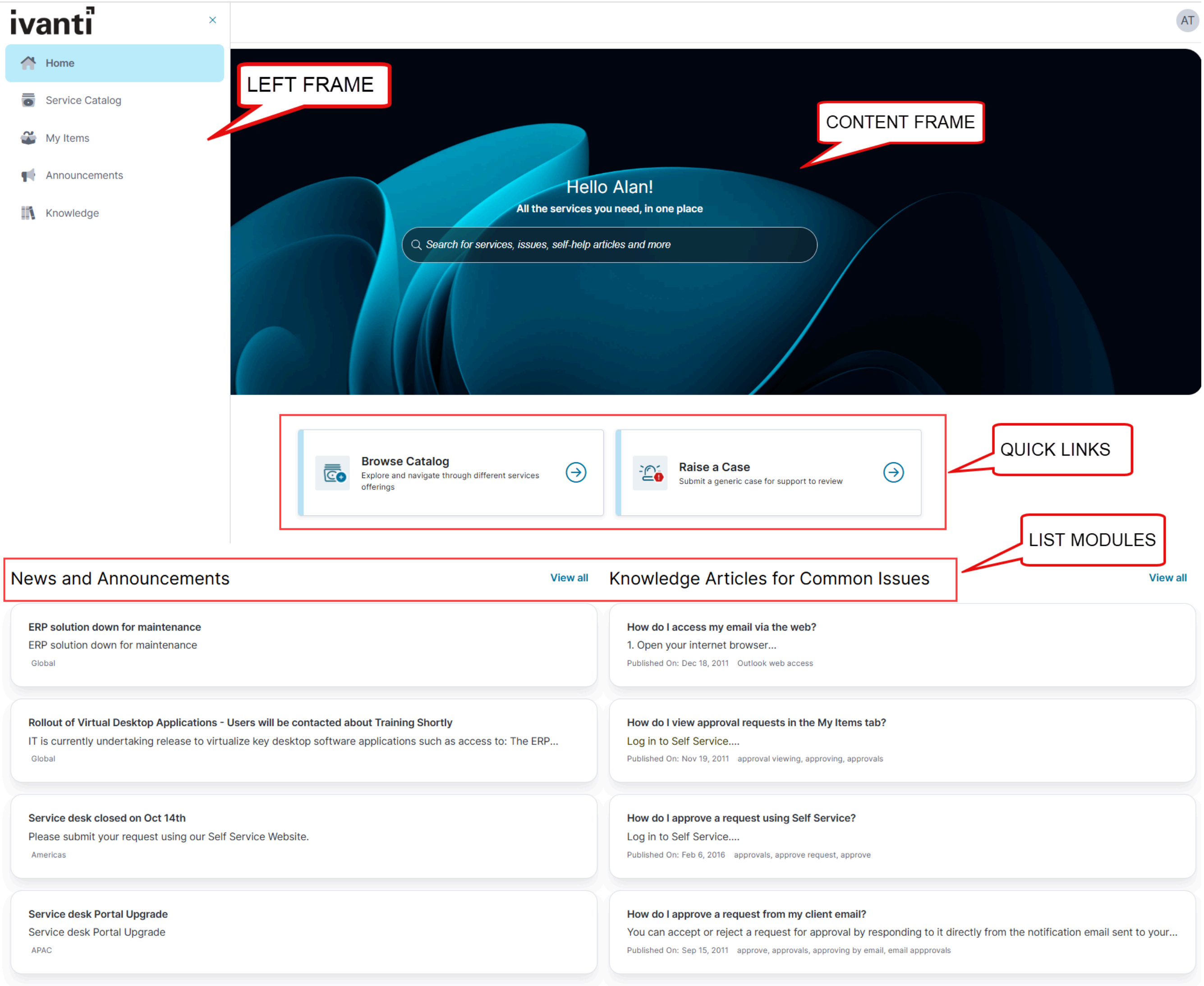
- Request services
- Report issues
- Access role based information
- Track requests and incidents
- View Announcements and browse Knowledge articles.

> Some features or modules described in this section are not available by default. You can view and access them only if your administrator has enabled them for your role or environment.

Portal Layout

The portal layout includes three main areas:

- **Banner Frame** : Shows your user profile, a search box to quickly find items, and the **Submit cart** feature.
- **Left Pane** : Lists modules such as **My Items** which allows you to create and view incidents.
- **Content Frame** : Displays the content of the selected workspaces.



Home Workspace and Landing Page Views

When you log in, the portal displays a home workspace based on your assigned role (for example, Administrator or Self Service). Your view may vary depending on your administrator’s configuration, including layout, landing page, available modules, and color scheme.

Landing Page Display Options

- **Enterprise Landing Page** - Displays all available roles as tiles, as defined in the **Exceptions / Custom Roles** section of the Style Editor. Each tile represents a role accessible to your user role. To access Self Service features, select the Self Service option from the dropdown or click the **Self Service** tile.
- **Self Service Extended Role** - Shows detailed information specific to the Self Service user role. The layout is tailored to your permissions, and only relevant features and data are displayed.

Search Functionality

Use the search box in the content frame to find services, reported issues, knowledge articles, FAQs, and announcements. As you type a keyword, related suggestions appear. Click a suggestion to navigate to search results page.

A secondary search option may appear next to your user login in banner frame. You can enter a keyword and navigate to the search results page.

Mobile Access and Session Timeout

You can access the portal on supported mobile devices. For security, the portal automatically logs you out after a period of inactivity, based on your organization's Single Sign-On (SSO) settings.

Using the Left Pane

Click the menu icon in the Left pane to access available modules. The modules you view depend on your assigned role and configuration:

UI Icon and Workspace	Description
Home	Provides quick links to raise requests, report issues, view news, announcements, articles, and FAQs.
	Track open requests or submit new ones for devices, software, or report issues.
	View and track your submitted service requests and reported incidents.
Announcements	View organization wide news, updates, and system messages. Administrators manage this workspace.
Knowledge	Browse Knowledge articles that provide you with information. You can search for troubleshooting tips and task resolutions.
You may view the following modules if your administrator has enabled them for your role.	
Alerts	View active alerts such as system errors, warnings, and informational messages.
FAQs	Find answers to common questions before submitting an incidents.
Chat	Start a live chat with the technical support team or self service support staff.
More	Click **More** to view additional workspaces configured for your role.

Quick Links

Browse Catalog - Click to browse different request offerings, such as devices or software, or other services, or report issues.

Raise a Case - Create a general support request. As you enter a title, related articles may appear to help you resolve the issue before submitting.

List Modules

News and **Announcements** - View the organization wide announcements and updates. Click **View all** to open the Announcements workspace.

Knowledge Articles for Common Articles - View common troubleshooting articles. Click **View All** to open the Knowledge Articles workspace.

> Based on the workspace configuration by , you can view customized links to specific workspaces or request offerings. These links allow you to directly navigate to the required workspace or submit a request.

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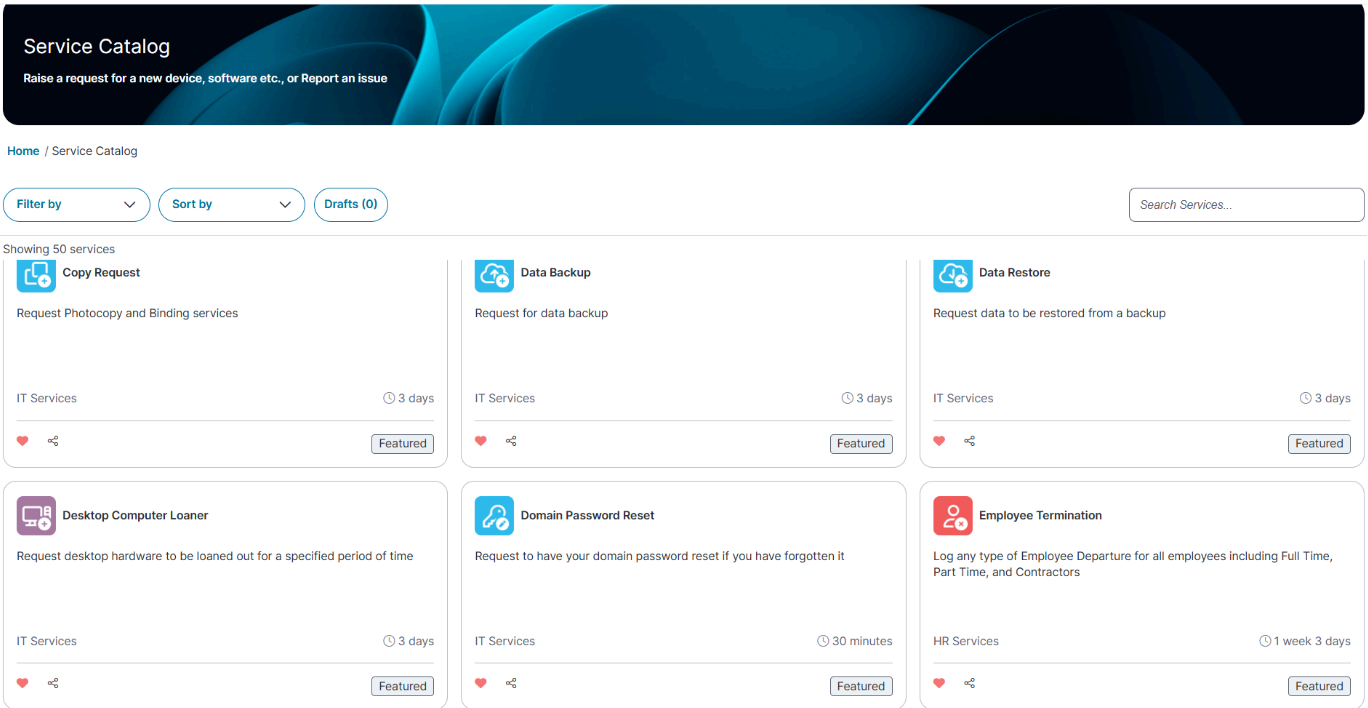
10.3. Service Catalog

Overview

The **Service Catalog** workspace allows you to request, view, and manage and Incidents. It lists all products and available to you, such as requests for software, computers, or email, and groups them by category. You can track the progress of your requests through their lifecycle.

Service Catalog workspace



You can use the following features to view records within the workspace:

- **Filter by category or presets** : Filter by department, Most popular, or Favorite (lists marked as favorites) or preset to define the category such as (HR Services, Most Popular Request Offerings, New Incidents, IT Services, Facility Services).
- **Group by category** : Organize by their category to streamline your search such as ascending or descending order.
- **Save as draft** : When creating a request, you can save it as a draft and submit it later. Requests that are pending submission are displayed as drafts. To view all drafts, click Drafts, the draft are displayed in top-right corner of the page and the entries in lists are sorted by the last modified date and time, rather than the original creation date.
- **Search by keyword** : Use the Search bar to find using specific keywords.

> You can also track the progress of your requests and incidents from the**My Items** workspace.

Creating a Generic Request

> If the Generic Request has not been configured by your administrator, it will not appear in search results and cannot be created.

Creating a generic request

1. Log in to .
2. On the **Service Catalog**, in search bar, type generic request.

   The **Generic request** appears or the type of offering that is set by your administrator is displayed, by default.
3. In the **Generic request** page, enter the required details and click **Submit** to raise work order request.

Reporting a new incident

An **Incident Report** is submitted when an unexpected issue disrupts normal offering operations, such as system outages, application errors, or hardware failures. Unlike offering, incidents are urgent and require immediate attention to restore offering. Incident reports involve investigation, diagnosis, and resolution, often requiring follow-up actions to ensure full resolution. When you enter an issue title while raising a case, related links are displayed. You can review these links to potentially resolve the issue without submitting the incident.

1. From the workspace menu, click **Service Catalog** icon .

   By default, the system displays all offering records for available products and services.
2. From the **Filter by** dropdown list, select **Report New Incident**.

   The Service Record form appears.
2. If the issue does not match the available options, click **New Incident**. In the form displayed, enter information into the fields as required, and click **Continue**.

   The Matching Panel page displays related articles that may help resolve the issue. Browse through the suggested solutions:
   - If a solution works, click **Resolve** to close the incident.
   - If the solution doesn't work, click **Back** to explore other options.
2. If no solution works, fill out the fields in the form and provide detailed information in the **Description** field.
3. In the **Urgency** field, select the urgency level of the issue and click **Save Incident**.

   The issue is an incident with an ID that you can track in the **My Items** workspace.
6. You may receive email updates from the Service Desk or Help Desk requiring additional information about the incident. If this occurs, respond within the period of time indicated in the email; otherwise, the incident automatically closes without resolution.
7. You can search for offering using the **Search Services** field. You cannot edit an incident once it is logged, but you can update it with notes or attachments (such as images or documents). You can also close an incident, regardless of its status. For details, see [My Items].

Submitting and Managing Service Request

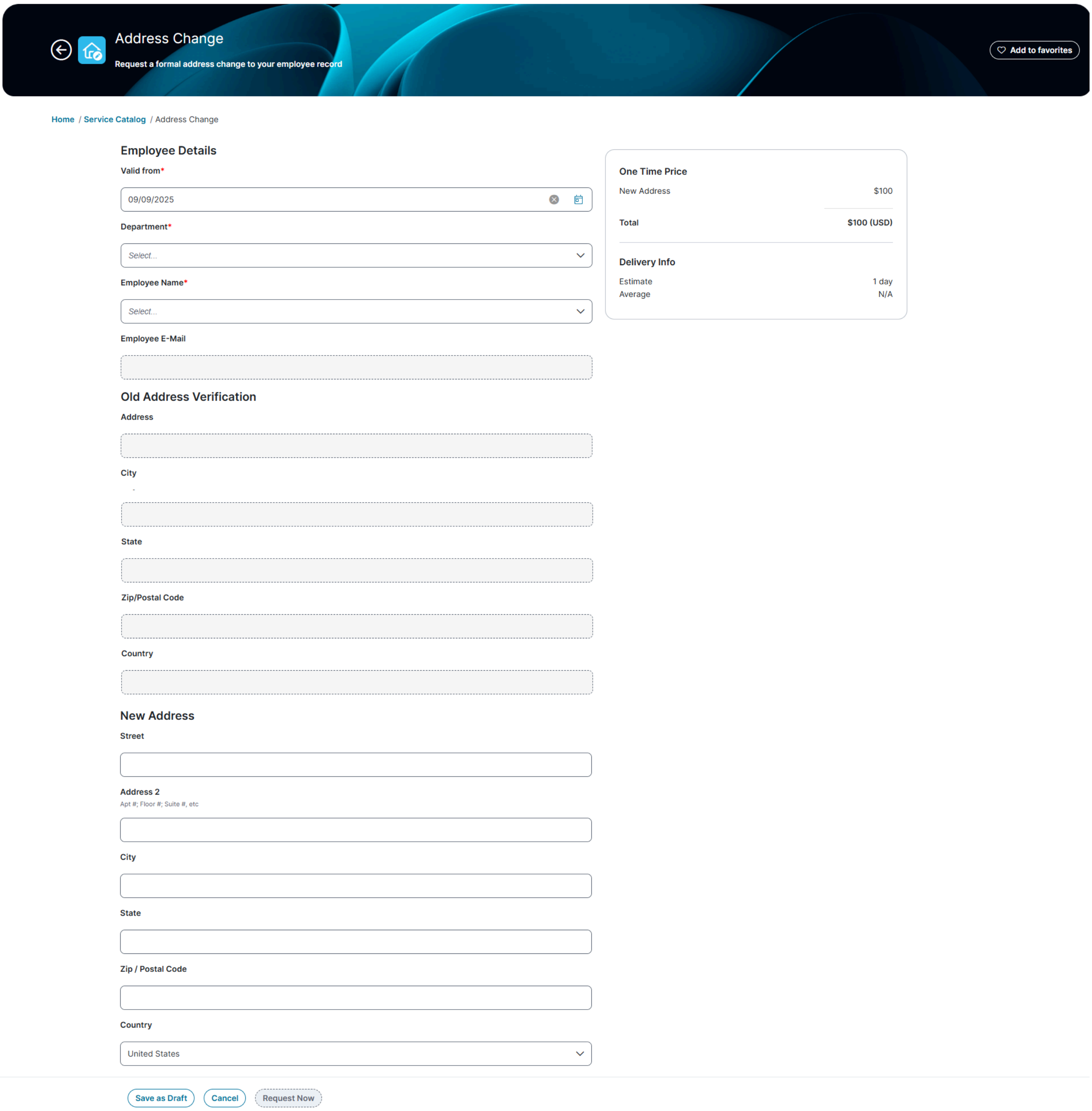
A **Service Request** is a formal request you make for a product, services, or access as part of regular organizational operations. This can include requests for hardware, software, system access, or other standard offering.

1. Log in to .
2. From the workspace menu, select **Service Catalog** icon .

   By default, the system displays all offering records for available products and services.

3. Use the **Filter by** or **Sort by** dropdown list, to narrow your search and select the desired offering.

   The Service options form appears.



4. In the **Service options** form, enter the necessary information in the fields.

   The layout of the form varies depending on the request type selected.

2. After entering all the required information, click **Request Now** to submit your request.

   You can now track the request from **My Items** workspace.

   > Once you submit the request, you can't edit or delete the request.

2. You can track the status of the request from your **My Items** workspace. You may receive email updates from the Service Desk requiring additional information. Respond within the given time; otherwise, the request will automatically close without resolution.
3. If you need to update an in-progress offering request, you can add notes or attachments, such as images or documents. For more details, see **My Items**.

Working with Copy Link and Send an Email

You can use the **Copy Link** and **Send Email** features to share offering records to an other application, such as email.

1. Log in to .
2. From the **Service Catalog** workspace, select a record and click either the Copy or share link icon.
   - **To copy the link**: Select **Copy Link**. A message will confirm that the link has been copied to your clipboard.
   - **To send an email**: Select **Email** icon. The default email client opens with the offering record in the email body. Enter the recipient details and send the email.

Working with Favorites

> The option is not enabled by default, it will only appear if your administrator has set it up for your role.

The Favorites category lists all offering that you have added to the Favorites, they appear at the top as tiles.

- To view all Favorites, select the **Favorites** option from the **Filter By** dropdown list.
- To add a offering to your Favorites, in the Service Catalog workspace, click the **Favorites** icon.

  A pop-up message confirms the offering has been added.

10.3.1. External Offerings

You access and submit through external offerings by clicking a URL on an external website. You view and request services, track your request using user and offering IDs in the URL, and choose how the request displays—either in a new window, inside , or within the **Service Catalog**.

To use the external offerings created by your administrator, follow these steps:

1. Log in to .
2. From the **Service Catalog** workspace, use the search bar to search for the external offering record.

   The external offering records are displayed.

3. Click an external offering card.

   A dialog will prompt you to continue or stay on the page.

2. If you select **Continue**, the URL opens in a new tab with your user ID and offering ID included.

10.4. My Items

The **My Items** workspace helps you track all the service requests and incidents you have submitted. You can monitor their status through a progress bar that shows these stages:

- Draft
- Submitted
- In Progress - Active, Waiting for Customer, Approved, Waiting for 3rd party, In Procurement
- Fulfilled
- Closed

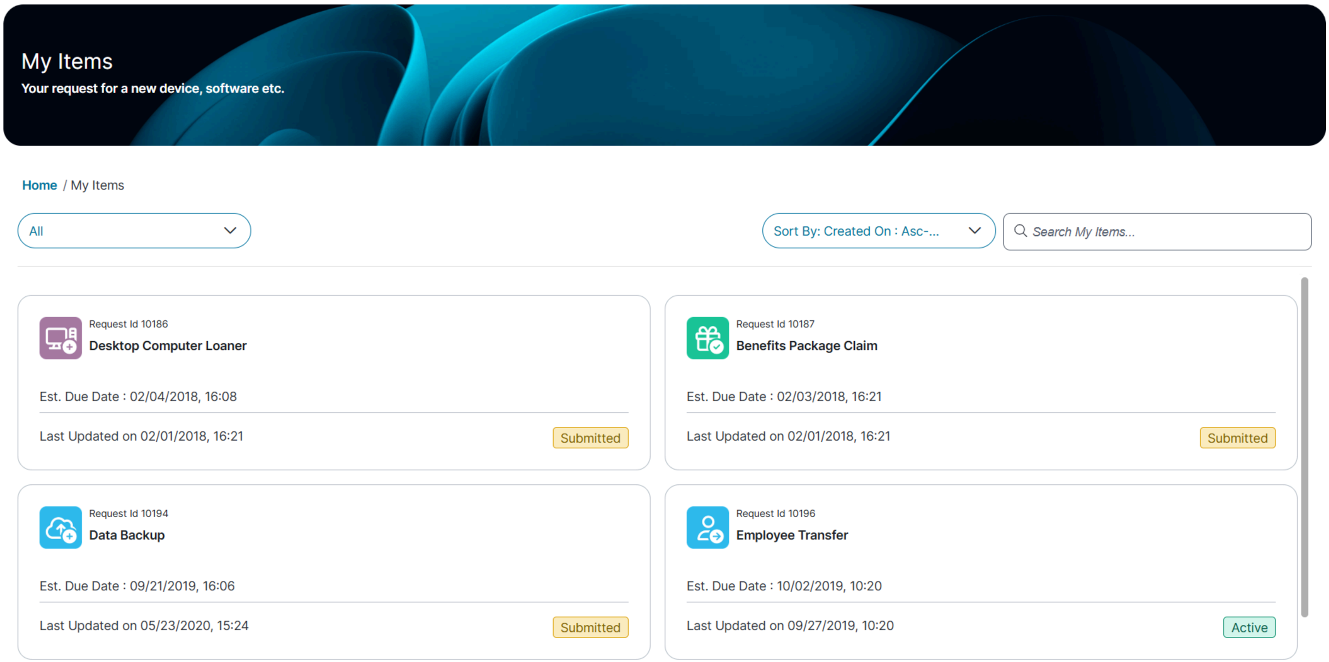
When a service request is in the In Progress state, its detailed progress is indicated by sub-statuses such as **Active**, **Waiting for Customer**, **Approved**, **Waiting for 3rd party**, and **In Procurement**. These sub-statuses are visible only on the service request card and do not appear on the **Status** tab.

In addition to tracking status, you can add notes, attachments, and submit new service requests or incidents directly from this workspace. Depending on administrator configuration, you may also be able to edit, cancel, escalate, request again, or reopen items.

Accessing and Viewing Your Items

1. Log in to .
2. From the left menu, select **My Items**.

The list of records appears.



my items main page

3. Click a record to open and view the details.

   The page displays the following tabs:

   - **Status** - Shows the current status: **Draft**, **Submitted**, **In Progress**, **Fulfilled**, **Closed**.
   - **Details** - Displays key information, such as identifiers, dates, descriptions, and related actions.
   - **Attachments** - Lists files added to the record.

Filtering, Searching, and Sorting Items

You can refine the list of items using search, filter, and sort options.

- **Search** - Enter a keyword in the **Search My Items** field and click the search icon.
- **Filter** - Click **Filter** and choose one of the following:
    - **All** - View all items.
    - **Approval** - View approved items.
    - **Incidents** - View raised items.
    - **Service Requests** - View raised service requests.

  The page displays filtered items based on your selection.
- **Sort By** - Click and choose from the following options:
    - **Created On: Asc-Des** - Created on ascending or descending order
    - **Modified On: Asc-Asc** - Modified on ascending or descending order
    - **ID** -Item number
    - **Status** - Based on the item status.

  The page updates to display items based on your selection.

Adding Notes and Attachments to My Items

> Starting with release 2026.1, you can add notes to any business objects only if an administrator has configured a trigger business rule to enable note creation in the self service page.

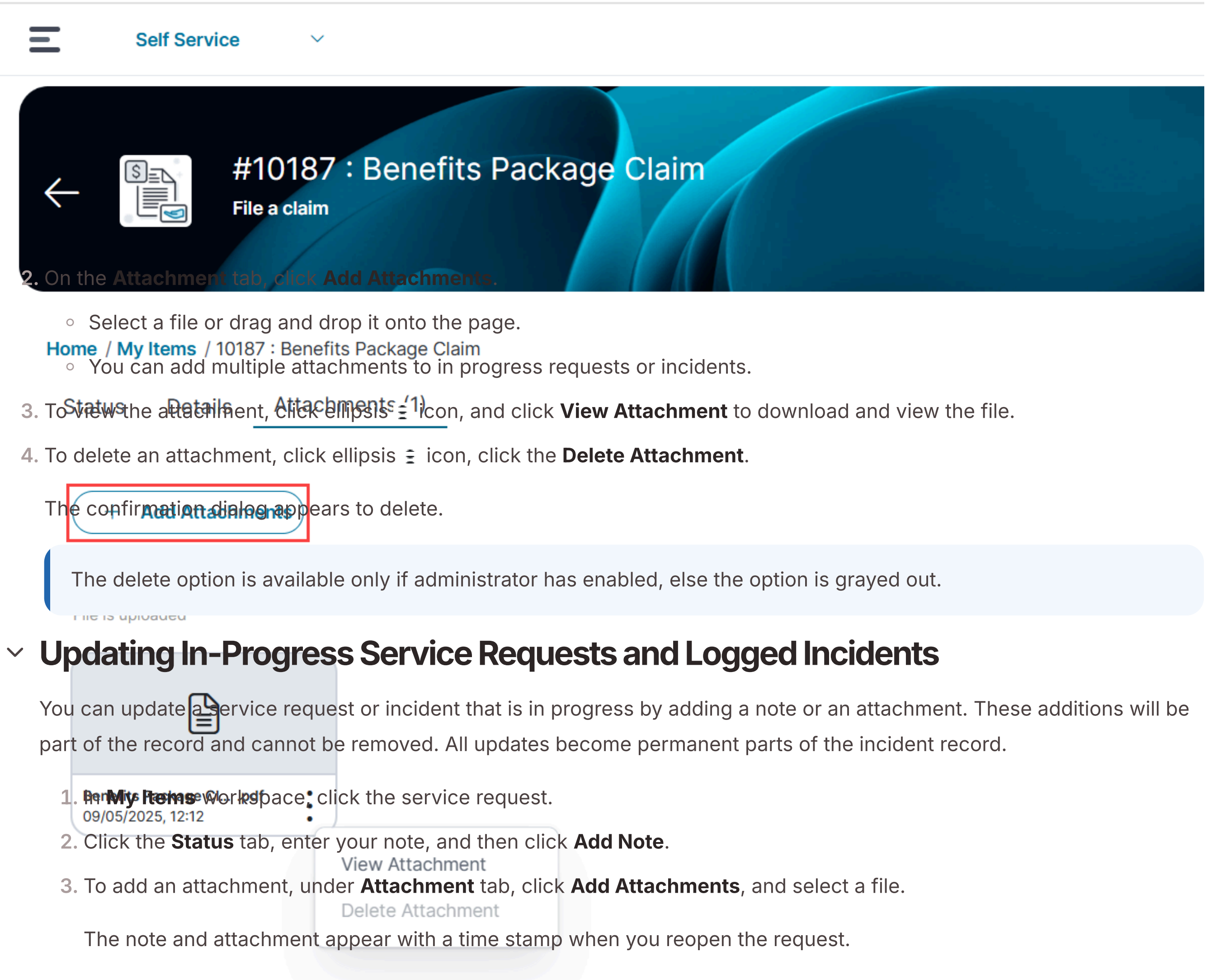
To add a note to a service request or an incident:

1. In **My Items** workspace, select the record you want to update.
2. On the **Status** tab, under **Notes** , enter your comments.
3. Click **Add Note**.
    - You can add notes to in-progress requests or incidents, but only before the incident is **Closed**. Once added, notes cannot be deleted.
    - Notes added by admin role are visible in the **Notes** section for tracking and collaboration.

To add an attachment

1. In **My Items** workspace, click the record you want to update.

The list of records appears.



2. On the **Attachment** tab, click **Add Attachments**.
    - Select a file or drag and drop it onto the page.
    - You can add multiple attachments to in progress requests or incidents.
3. To view the attachment, click ellipsis icon, and click **View Attachment** to download and view the file.
4. To delete an attachment, click ellipsis icon, click the **Delete Attachment**.

    The confirmation dialog appears to delete.

> The delete option is available only if administrator has enabled, else the option is grayed out.

Updating In-Progress Service Requests and Logged Incidents

You can update a service request or incident that is in progress by adding a note or an attachment. These additions will be part of the record and cannot be removed. All updates become permanent parts of the incident record.

1. In **My Items** workspace, click the service request.
2. Click the **Status** tab, enter your note, and then click **Add Note**.
3. To add an attachment, under **Attachment** tab, click **Add Attachments**, and select a file.

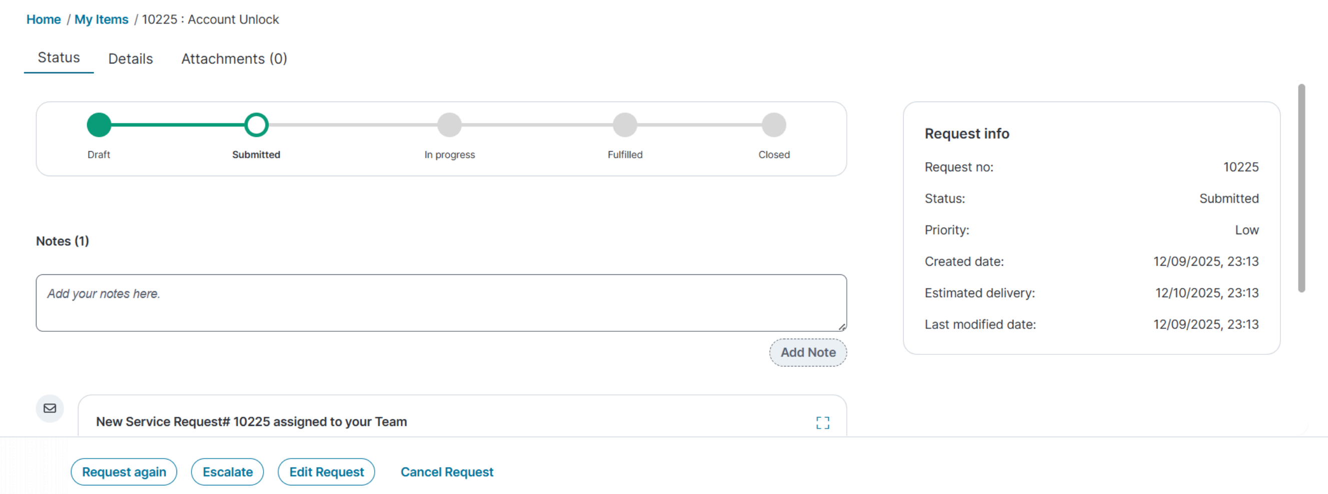
    The note and attachment appear with a time stamp when you reopen the request.

4. To update logged incident, in the **Status** section, enter your note and click **Add Note**.

Managing and Modifying Service Requests

You can use options such as edit, or escalate, or requesting again, or cancel or reopen request, if has enabled it for your .

Edit, Escalate, Cancel, Request Again, or Reopen Service Requests



my items main page

From the left menu, select My Items.

The service requests are displayed.

1. Open the required service request.
2. Based on the your requirement, perform one of the following:
   - **Edit Request** - Select **Edit Request**, allows you to add or modify the existing details in the submitted request.
     - Click **Edit** to confirm, make the necessary changes and click **Submit**.

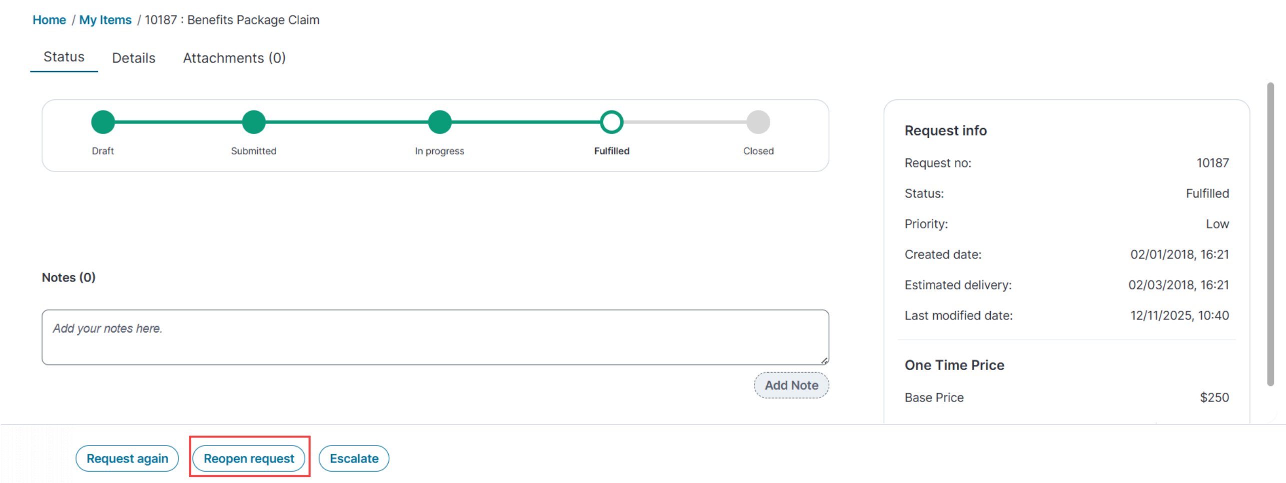
   > You can edit requests that are in **Draft** , **Submitted**, or **In progress** and it's sub-statuses.

   - **Cancel Request** - Select **Cancel Request**, allows you to permanently closes the submitted request.
     - Click **Yes** to delete the submitted request.

> You can cancel requests that are in **Draft**, or **Submitted**, or **In progress** and it's sub-statuses.

- **Escalate** - Select **Escalate**, allows you to flag the requests for higher priority. It allows you to indicate that a request requires elevated attention.
    - The confirmation window appears, enter a brief note in the dialog box and click **Escalate**.
- **Request Again** - Select **Request Again**, allows you to create a new request based on a on a previously completed request. When selected, the system creates a new request and populates applicable field values from the original request to reduce data entry.
    - Review the message indicating that a new ticket ID will be generated, click **Confirm** to proceed.

> You can request again that are in **Submitted**, or **In progress** and it's sub-statuses, or **Fulfilled** or **Closed** state.



my items main page

Reopen Request

 - Select

Reopen Request

, allows you to reopen the request once again that are resolved. Make sure that the

Reopen Request

 button is enabled.

- Enter reason in the window for reopening the request and click **Reopen**. After submission, the status changes to **Submitted** state.

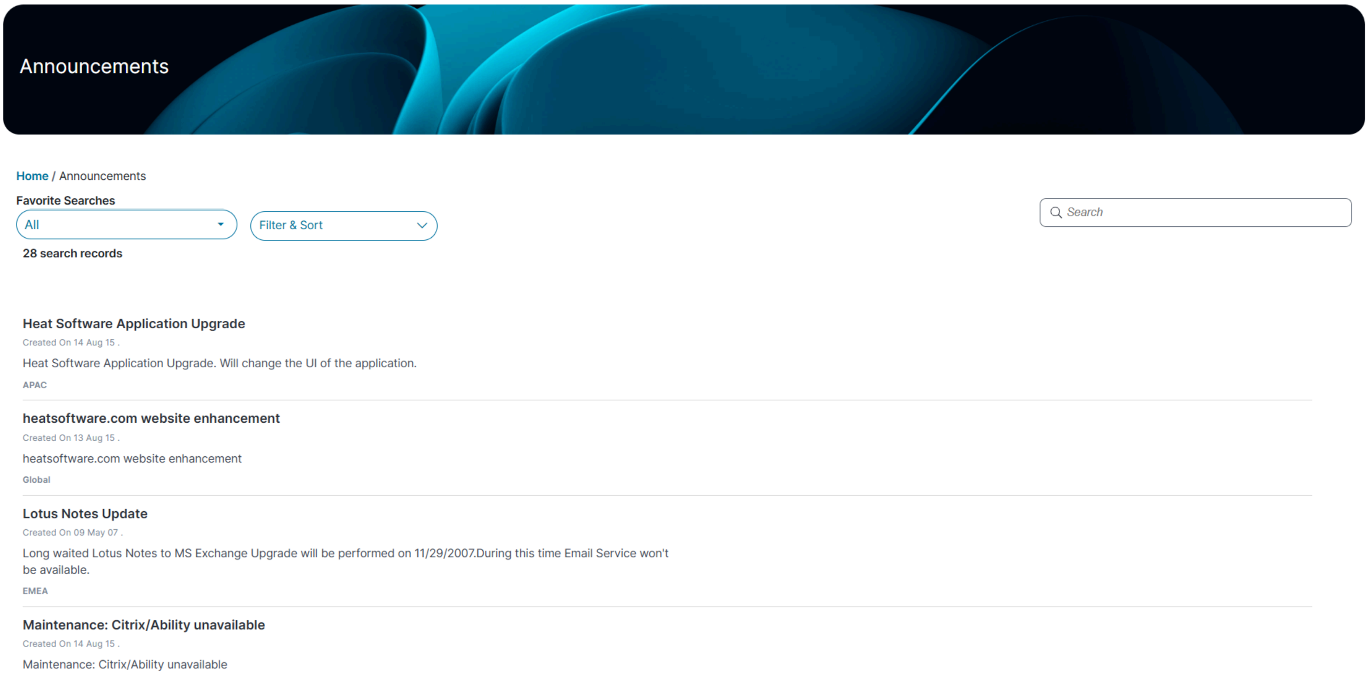
> You can reopen requests that are in **Fulfilled** or **Closed** state. Once the request moves to a **Closed** state again, the system removes the Reopen option, preventing repeated reopening of the request.

10.5. Announcements

> The Announcements module is not available OOTB. This workspace appears only if your administrator has configured it for your role.

The Announcements workspace allows you to view the latest messages and alerts, such as downtime notices, maintenance schedules, upgrade notifications, virus threats, and other bulletin-type communications shared across your organization.

You can view announcements. Only can create or edit them.



Viewing Announcements

1. Log in to .
2. From the left menu, select **Announcements**.

The list of Announcements are displayed.

3. Click an announcement to view the following information:
   - Description
   - Urgency
   - Region
   - Created By
   - Effective Date
   - Expiration Date
   - Created On

Search for an announcement

1. In the Announcement workspace, go to the **Search** text field, enter a keyword related to the announcement.
2. Press **Enter**.

The workspace displays announcements matching your keyword.

Filter and Sort Announcements

1. In the Announcement workspace, click **Filter and Sort** from the dropdown list.
2. Choose one of the following sort orders:
    - **Ascending**
    - **Descending**
3. Choose a field to sort by:
    - **Subject**
    - **Urgency**
    - **Created Date Time**
    - **Description**
    - **Region**
4. Click **Apply** to sort the list.
5. To remove sorting, click **Reset All**.

Use Favorite Search filter

> This feature is available only if your administrator has enabled it.

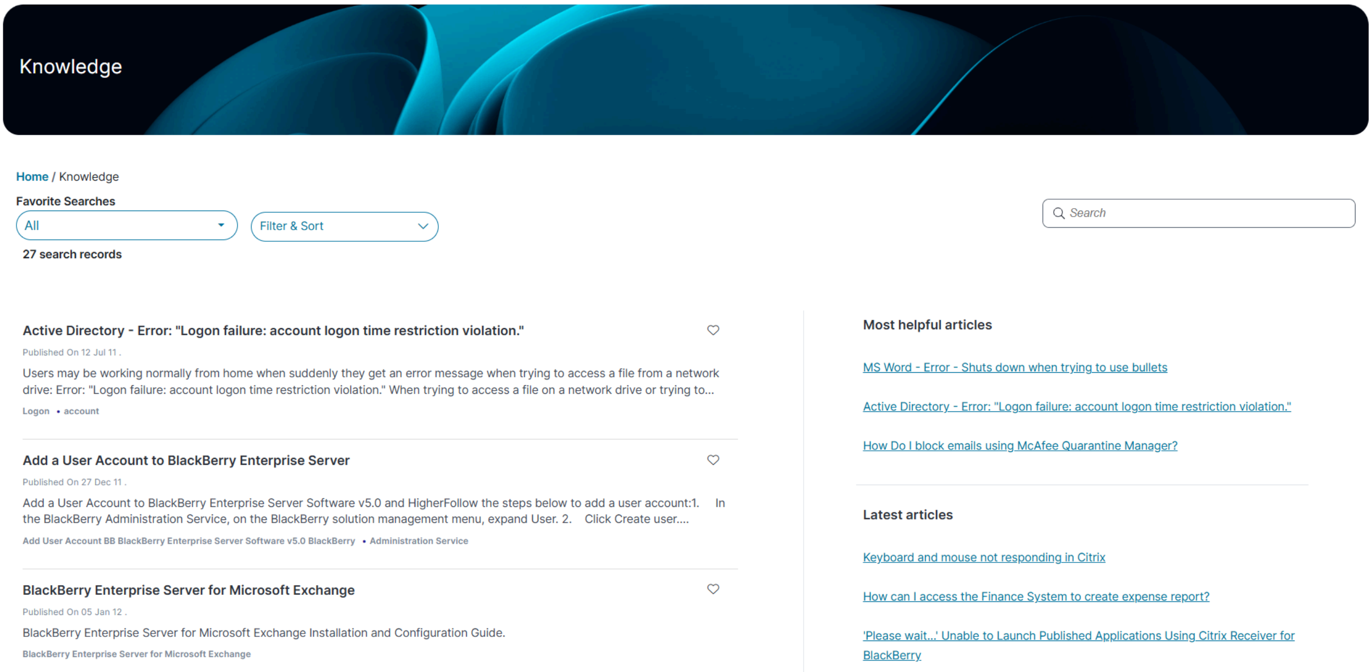
1. In the Announcements workspace, click **All** from the dropdown list.
2. Choose a specific announcement, such as **Urgent Announcements**, **HR Announcements**, or **Published Announcements**, to filter the list.

The workspace display based on your selection.

10.6. Knowledge

> The Knowledge module is not available OOTB. This workspace appears only if your administrator has configured it for your role.

The Knowledge workspace allows you to access all articles available in the Knowledge Center to find solutions or workarounds for your issues. It displays the most helpful and latest articles to assist you in troubleshooting your queries.



Viewing Knowledge articles

1. Log in to Neurons for ITSM.
2. From the left menu, select Knowledge.

The list of Knowledge articles are displayed.

3. Click an article to view the content.

To search for a specific knowledge article, enter a keyword in the **Search** field (upper-right corner of the page) and press the **Enter**. The matching results are shown.

Search for a Knowledge articles

1. In the Knowledge workspace, enter a keyword in the **Search** field.
2. Press **Enter**.

The list of Knowledge articles are displayed.

Filter and Sort articles

In the Knowledge workspace, you can use **Filter & Sort** to narrow or organize the article list.

To filter articles

1. Click **Filter & Sort** dropdown list, and expand **Filter By**
2. Choose from the following filter options:
    - **Author** - Mine
    - **Assignment** - Unassigned, My Team, Mine
    - **Status** - Pending, Published, Pending Approval, In Review, Archived, etc.
    - **Published Date** - Today, This Week, This Month, This Year
    - **Effective Date** - Today, This Week, This Month, This Year
    - **More Option** - Linked to an - Incident, or Problem, or CI
    - **Category** - Accessibility, Backup, Desktop - Hardware, Software, Phone, etc.
    - **User Rating** - Based on number of stars
    - **Created On** - From the last 7 days up to 1 year
    - Knowledge **type** - Document, Error Message, FAQ, Patch, Q&A, Reference

To sort articles

1. Expand **Sort By**
2. Choose a sort order: **Ascending** or **Descending**
3. Select a sort field:
    - **Title**
    - **Description**
    - **Published Date**
    - **Keywords**
4. Click **Apply** to update the articles.

Use Favorites to Save and View Knowledge Articles

> This feature is available only if your administrator has enabled it for your role.

You can mark important knowledge articles as favorites to easily access them later from a filtered view.

Mark an Article as Favorite

In the Knowledge workspace, click the **Favorite** ♡ icon next to the article you want to save.

- The icon changes to ♥ show the article is now a favorite.
- A confirmation message appears, and the article moves to the top of the list with your other favorites.

View your Favorite Article

In the Knowledge workspace, under **Favorite Searches** select **My Favorite Knowledges** from dropdown list.

- Your saved articles appear based on how your administrator has configured favorite views, such as **Urgent Articles**, **HR Policies**, or **All Published Knowledge Articles** .

Provide feedback for an article

1. In the Knowledge workspace, select the article you want to rate.

   The selected Knowledge article is displayed.

2. Click **Yes** or **No** under **Was this article helpful**?
3. Under **Rate this article**, select a star rating:
   - 1 star = Not useful
   - 5 stars = Exactly what I was looking for
4. (Optional) Enter detailed feedback in the **Feedback** section.
5. Click **Submit Feedback**.
6. To update your feedback later, click the **Edit** icon, make your changes and then click **Update feedback**.

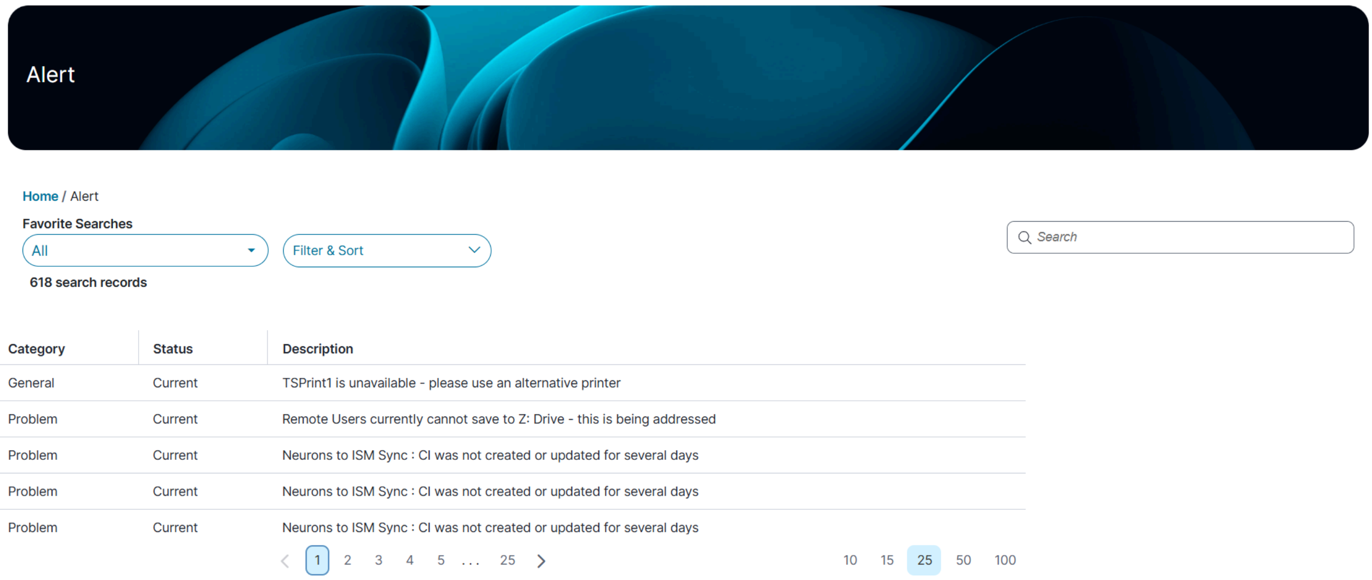
10.7. Alerts

> The **Alerts** module is not available OOTB. This workspace appears only if your administrator has configured it for your role.

The **Alerts** workspace allows you to view important notices, including:

- System or application errors (such as performance issues or application shutdowns)
- Warnings
- Informational messages.

Alerts help you proactively identify and address issues before they affect users.



Accessing Alert workspace

1. Log in to .
2. From the left menu, select **Alerts**.

The list of alerts display showing key details such as the category, status, description.

3. Click a number below to display the corresponding set of alerts on the page.

View and Managing Alerts

View Alert Details

1. Click the alert you want to view.

The following details are displayed:

- Category
- Status
- Detailed Description
- Severity
- Created By
- Last Modified By
- Created Date
- Last Modified Date

Sort Alerts

1. Click **Filter & Sort** dropdown list.
2. Choose one of the following sort orders:
   - **Ascending**
   - **Descending**
3. Choose a field to sort by:
   - **Category**
   - **Status**
   - **Description**
4. Click **Apply**, to sort the list.
5. To remove sorting, click **Reset All**.

Search Alerts

1. In the **Search** box, enter a keyword.
2. Click **Enter**.

The list updates and matching alerts are displayed.

Customize alert view in Self Service mobile application

1. In the **Alerts** workspaces, click **All** from dropdown list.
2. Click the **Tile View** icon to display alerts as tiles (or bricks).

The tiles optimize space and readability of data.

3. Click the **List View** to view the records in list records view.

The list records view shows records as rows.

10.8. Chat with Support v3

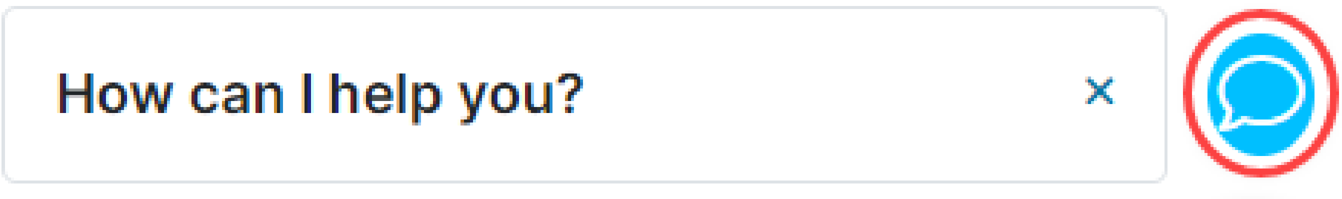
The **Chat with Support v3** feature allows you to interact with the Support or Service Desk Analyst team either through the built in chat options (Chat with Support or Chatbot) or through the Microsoft Teams. This service enables you to resolve issues or ask questions through one-on-one communication or automated responses from the Chatbot. You can also create incidents directly from the chat interface.

> The option is not enabled by default, it will only appear if your administrator has set it up for your role. Reach out to your organization's administrator to request access.

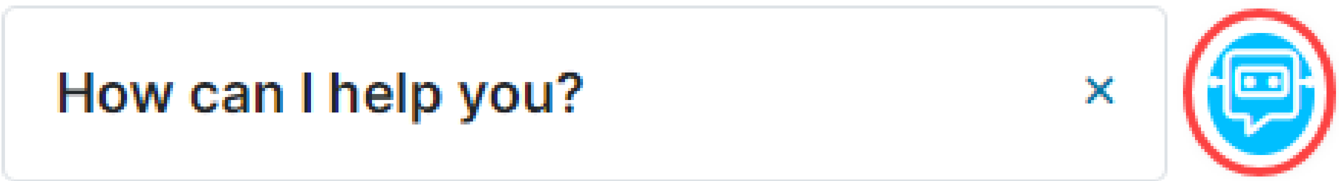
Chat Features

Chat with Support provides a direct connection to the support team, while Chatbot offers an automated service for resolving common queries.

- **Chat with Support** - This option connects you to a live support agent for real-time assistance.



- **Chatbot** - This option opens an automated service that can provide answers to common questions.



If only a single chat icon is displayed, click the icon to view both **Chat with Support** and **Chatbot** options.

To close the chat, select the **Close** icon in the message box.

Using Chat with Support

1. Click the **Chat with Support** icon to open a new chat window.
2. Check the chat availability:
   - If a support staff member is available, the chat window displays "*We are online.*".
   - If no staff members are available, the chat window displays "*Chat is unavailable at this time!*".
   - Once connected, the window displays "*Connected to <Service Desk Analyst name>* in the chat window.
3. Type your query or issue in the text box and click the Send icon.

   The Service Desk Analyst responds to your query. If the issue cannot be resolved via chat, the Service Desk Analyst will create an incident for you, and the incident number will be displayed in the chat window.

If you remain idle in the chat for an extended period, you will receive two warnings before being logged off.

Using the Chatbot

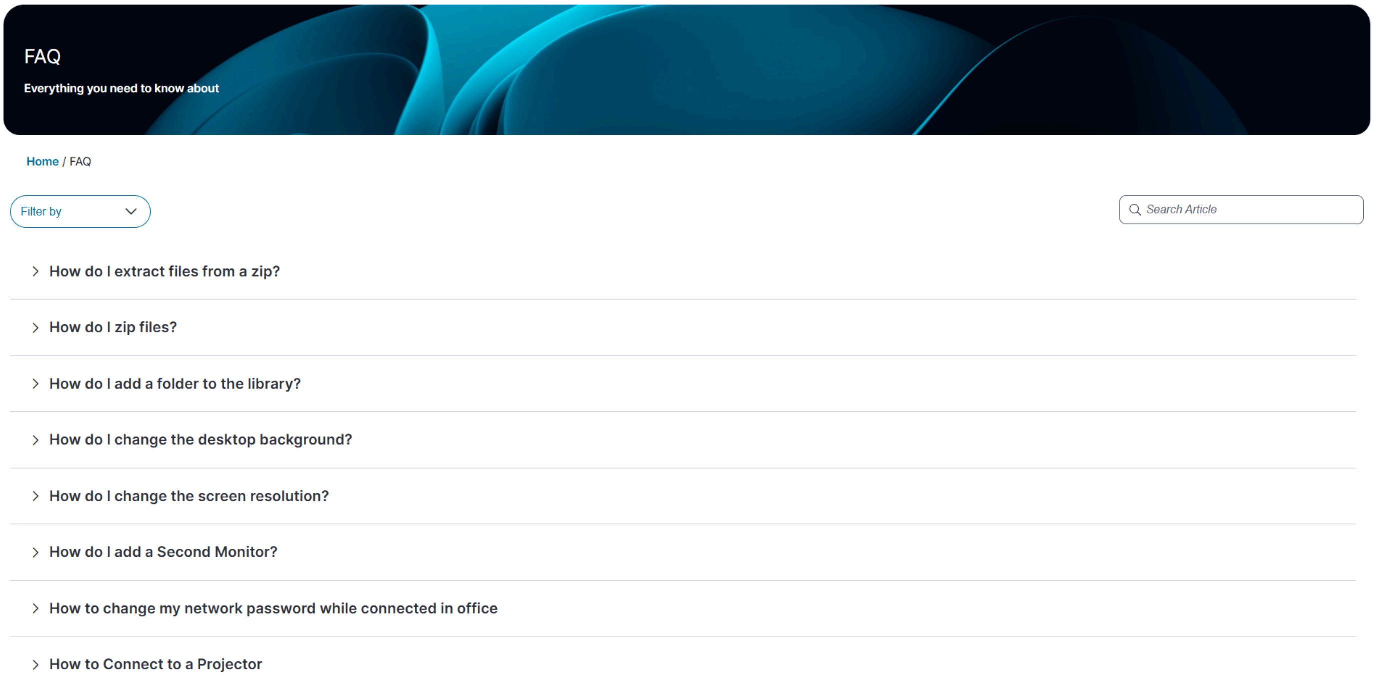
1. Click the **Chatbot** icon to open the Chatbot window.
2. Use the available features of the Chatbot to resolve common queries.

Chatbot functionality is based on configurations set by your administrator in Global Settings. To request changes to Chatbot behavior or features, contact your administrator.

10.9. FAQ

> The **FAQ** module is not available OOTB. This workspace appears only if your administrator has configured it for your role.

The **FAQ** workspace helps you find answers to frequently asked questions. You can use this workspace to identify solutions or workarounds for common issues before raising an incident.



Browse all published FAQs

1. Log in to .
2. From the left menu, select **FAQ**.

The list of all published FAQs appears.

3. Click the expand icon next to any FAQ to view its full content.
4. Click a number in the lower-right corner to display the corresponding set of FAQs on the page.

Search for a Specific FAQ

1. In the **FAQ** workspace, go to the **Search Article** box.
2. Enter a keyword related to your issue, and press **Enter**.

The system displays matching FAQs.

Filter FAQs by Category

1. In the **FAQ** workspace, click **Filter by** dropdown list.
2. Select the category you want to view from following options:
    - All Category
    - Hardware
    - Software
    - Telephony

11. Using Microsoft Teams Bot

Role: Self Service Users.

Minimum Version: 2021.1.

Prerequisites:

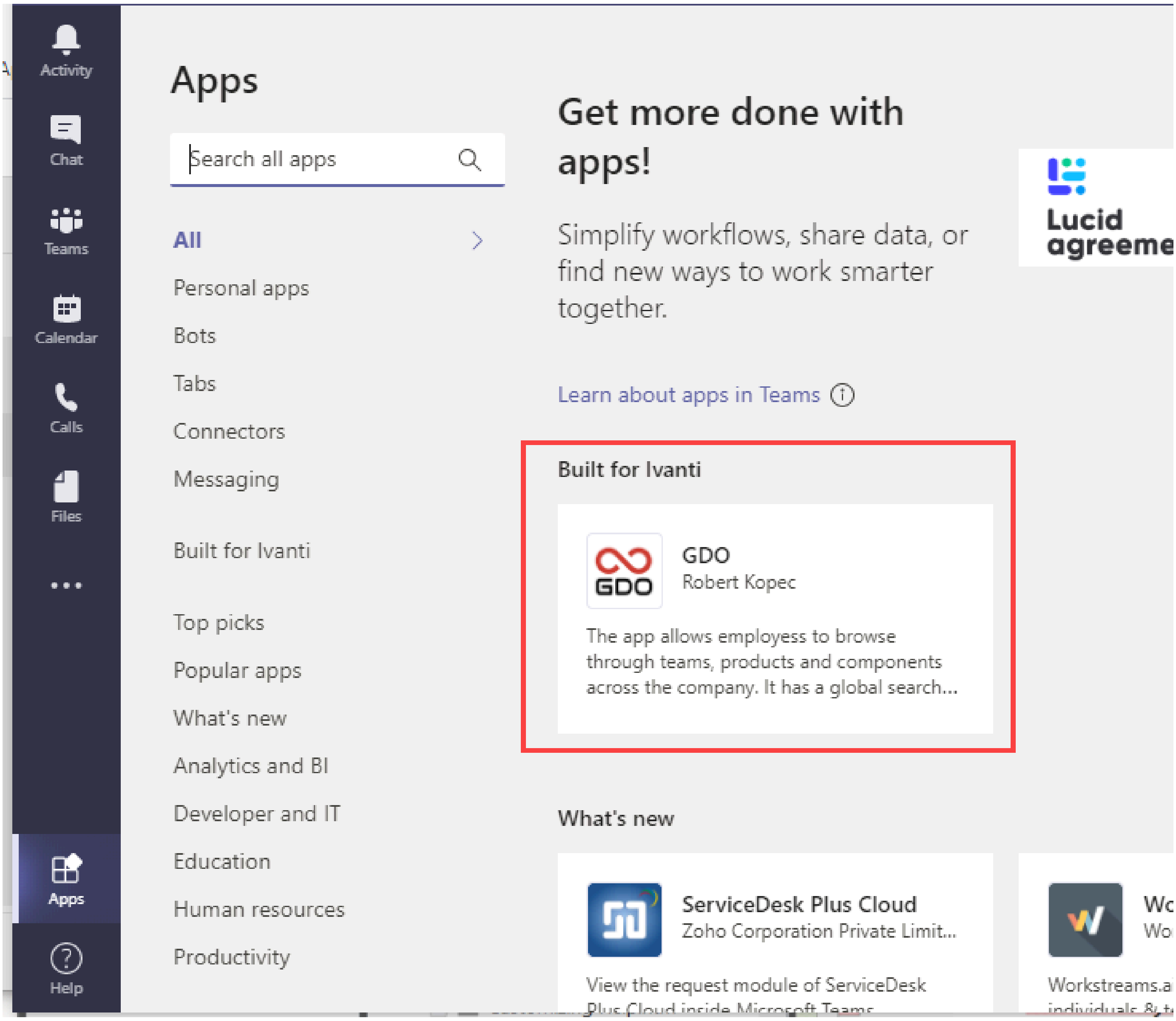
- Install Microsoft Teams on your computer and set up your client account.
- Add the Teams app specific to your organization to your Teams client account.

  a. Log in to your Teams client account.

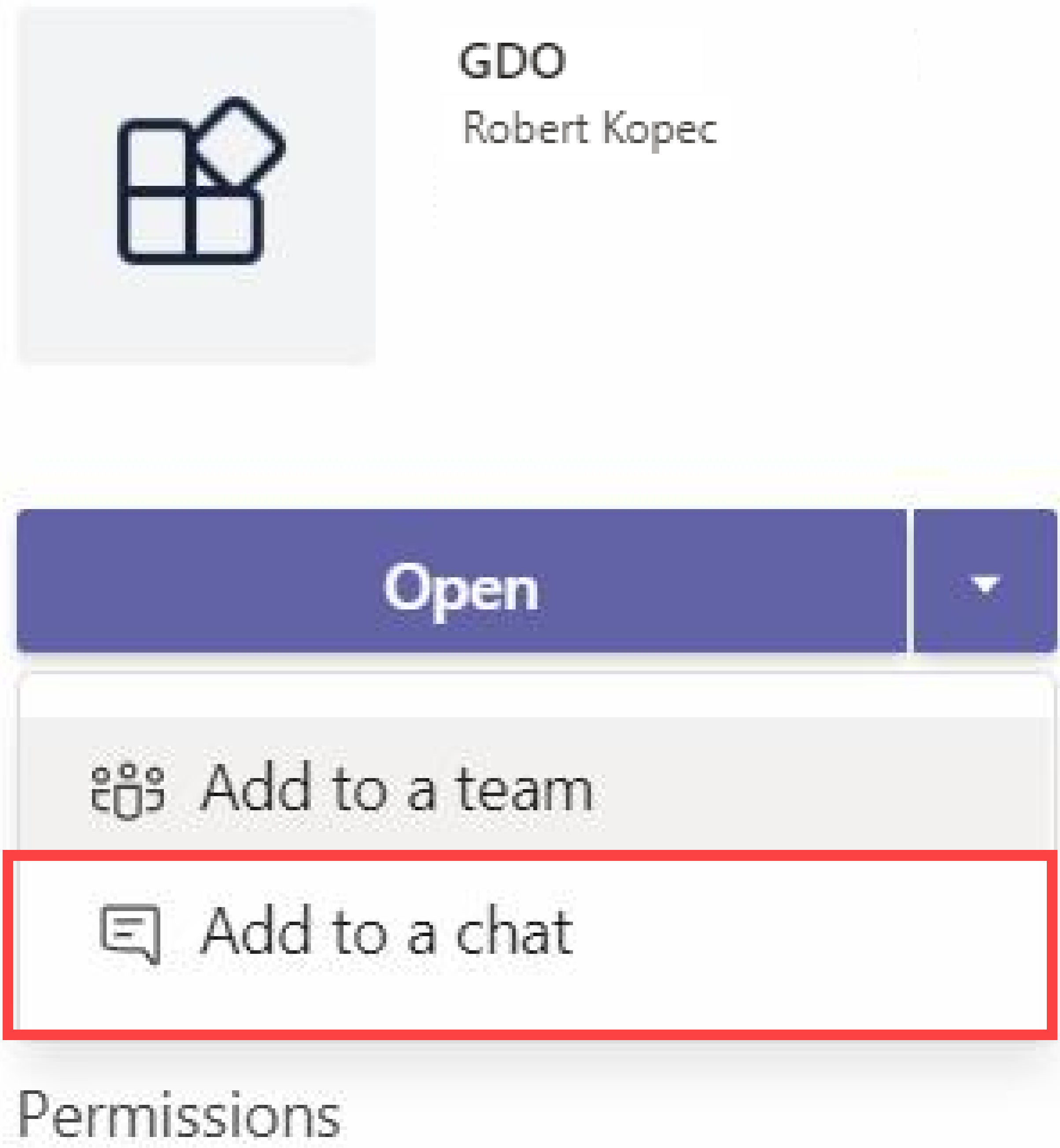
  b. Click **Apps** > select the Teams app created for your organization > **Add to a chat**.

The Teams app for your organization is now added to your chat contacts. This will allow you to message Service Desk Analysts.

Sample Image of Teams app build for



Sample Image of adding Teams app built for to Teams chat



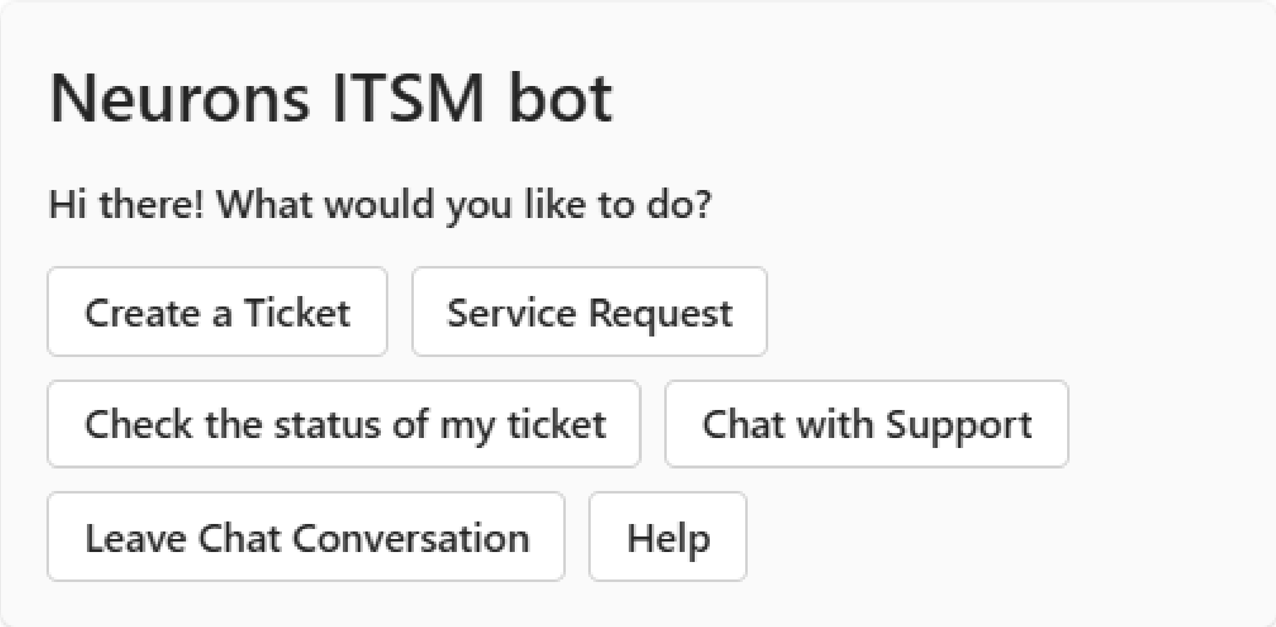
If you can't find your organization's Teams app or encounter issues adding it, contact your organization's administrator.

Working with the Microsoft Teams Bot

After the MS Teams Bot is configured and published in your organization, it will appear in the Teams chat with your organization name.

1. Log in to your Microsoft Teams client account.
2. Click the Teams app for your organization that you added to your chat in the **Prerequisites:** section.
3. To start a conversation, say 'Hi'. The following page will appear.

Image of the Ivanti Service Manager Bot Page



4. You can perform the following actions:

- **Create a Ticket**: Allows you to create an incident. The bot creates an incident after asking additional questions and displays the incident ID. The incident is then routed to the Support/Service Desk team to address it.
- **Create a Service Request**: Allows you to create a service request. The available templates are configured by an administrator.

Ensure the **Enable for Teams Bot** checkbox is selected in the ITSM portal for the feature to be visible on the Teams bot.

- **Check my Ticket Status**: Lists the status of all incidents and service requests you have created.
- **Chat with an Analyst**: Opens a chat channel with an available analyst to resolve your issue.
  - If an Analyst does not pick up your chat, you will receive a message saying "Please stand by, while we connect you to another analyst". You can wait to be connected.
  - If no Analyst is online, you will get the message - "All analysts are offline". You can continue waiting till an analyst is online or exit. The maximum wait time to connect you to an Analyst is 5 minutes after which the following message is displayed - "Sorry, we are unable to connect you at this time." Click **Yes** to continue using the bot or **No** to exit.
- **Close Chat Conversation**: Ends chat conversation with the chat analyst.
- **Help**: Displays help information about all commands.

- If you send a text message instead of selecting one of the given options, the following message is displayed - "Invalid selection. Please select one of the available option."
- Whenever the Bot displays options, select from the given options. Else, an invalid message is displayed prompting you to select only from the options displayed.

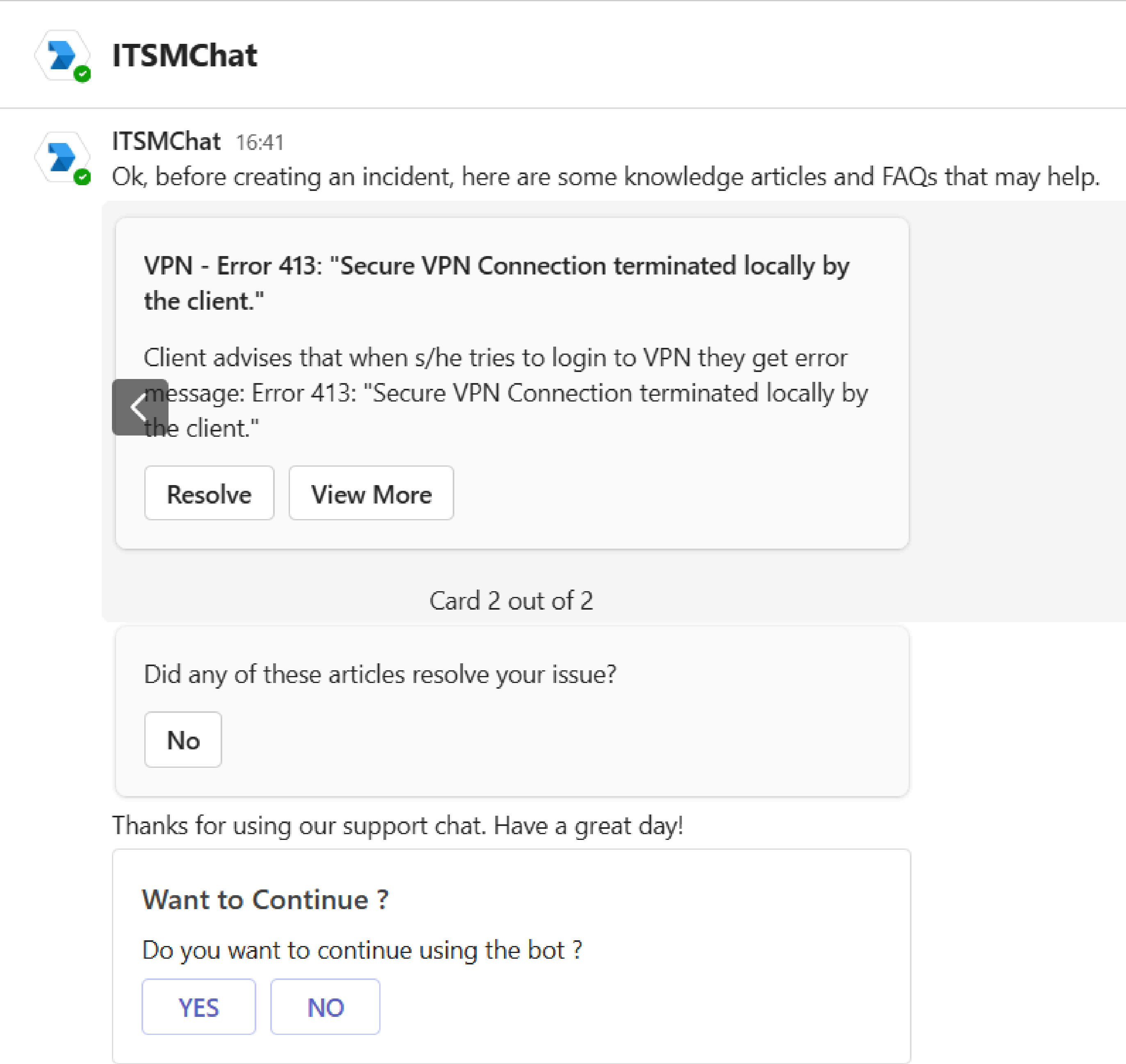
Feedback flow and new commands

The MS Teams Bot experience provides improved clarity, usability, and end-user engagement. After you configure and publish it in your organization, the bot appears in your Teams chat under your organization's name and supports a streamlined conversation flow.

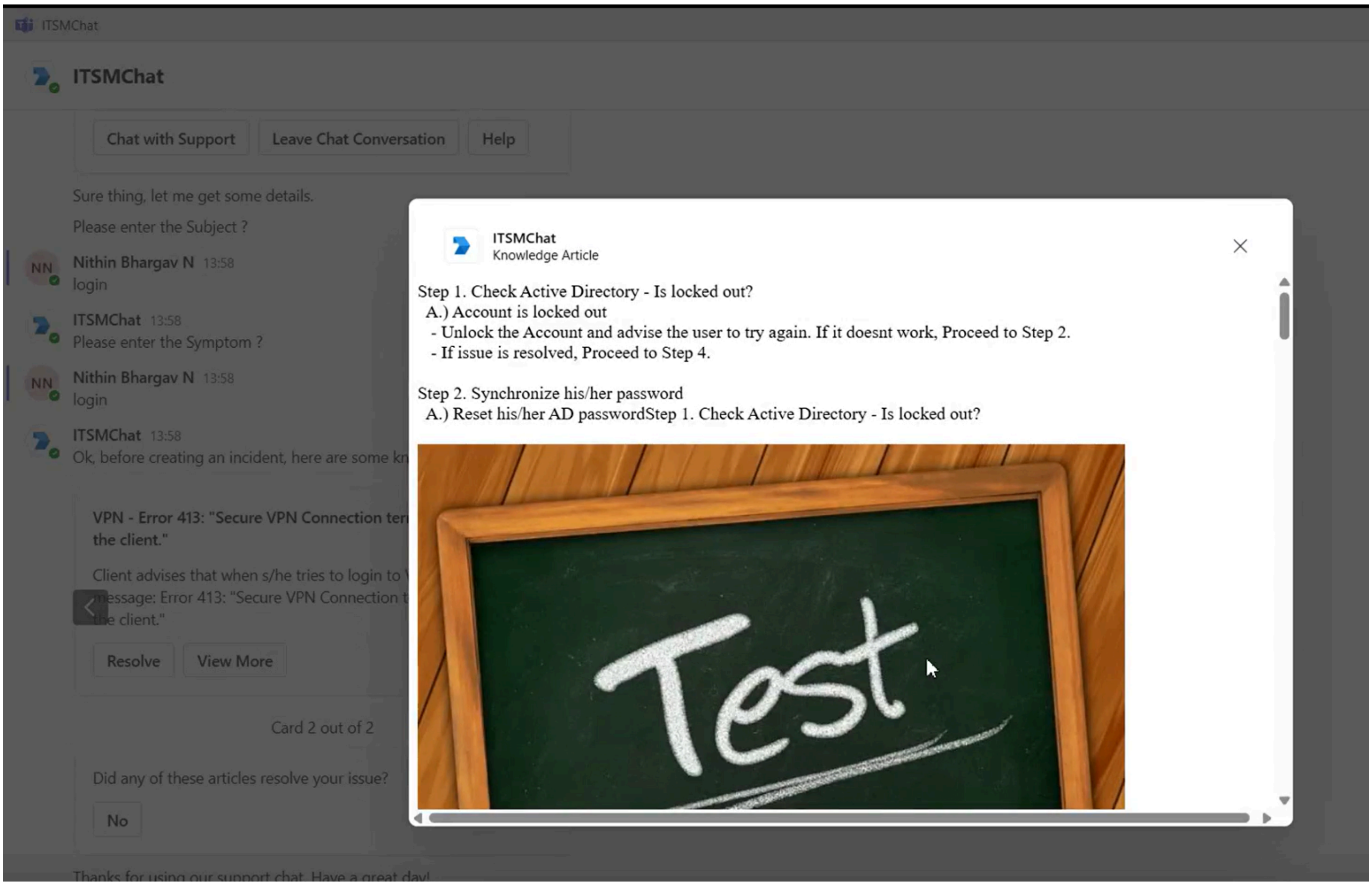
The interaction includes the following steps:

- **Review suggested articles before submitting a ticket** - The Bot recommends the list of relevant KB articles and FAQs before creating a support ticket. Click **View More** on a KB article to open the full article in a pop-up window within Microsoft Teams. If you find your answer through the knowledge articles or FAQs, click **Resolve** to close the issue.

  KB Articles and FAQs to help resolve issues



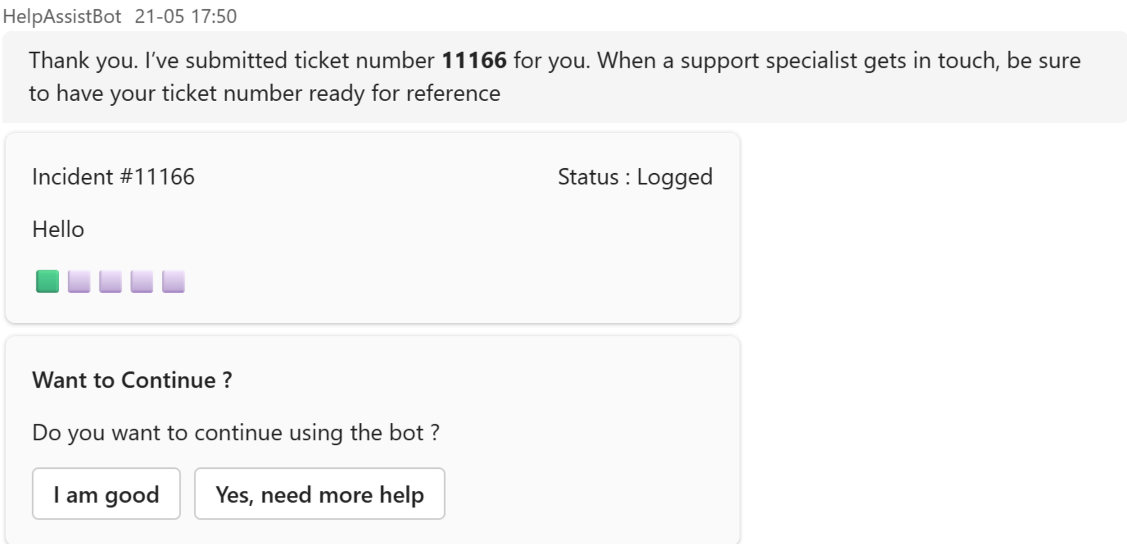
KB Articles in pop-up screen



Click **No** to proceed with ticket creation if none of the suggestions help.

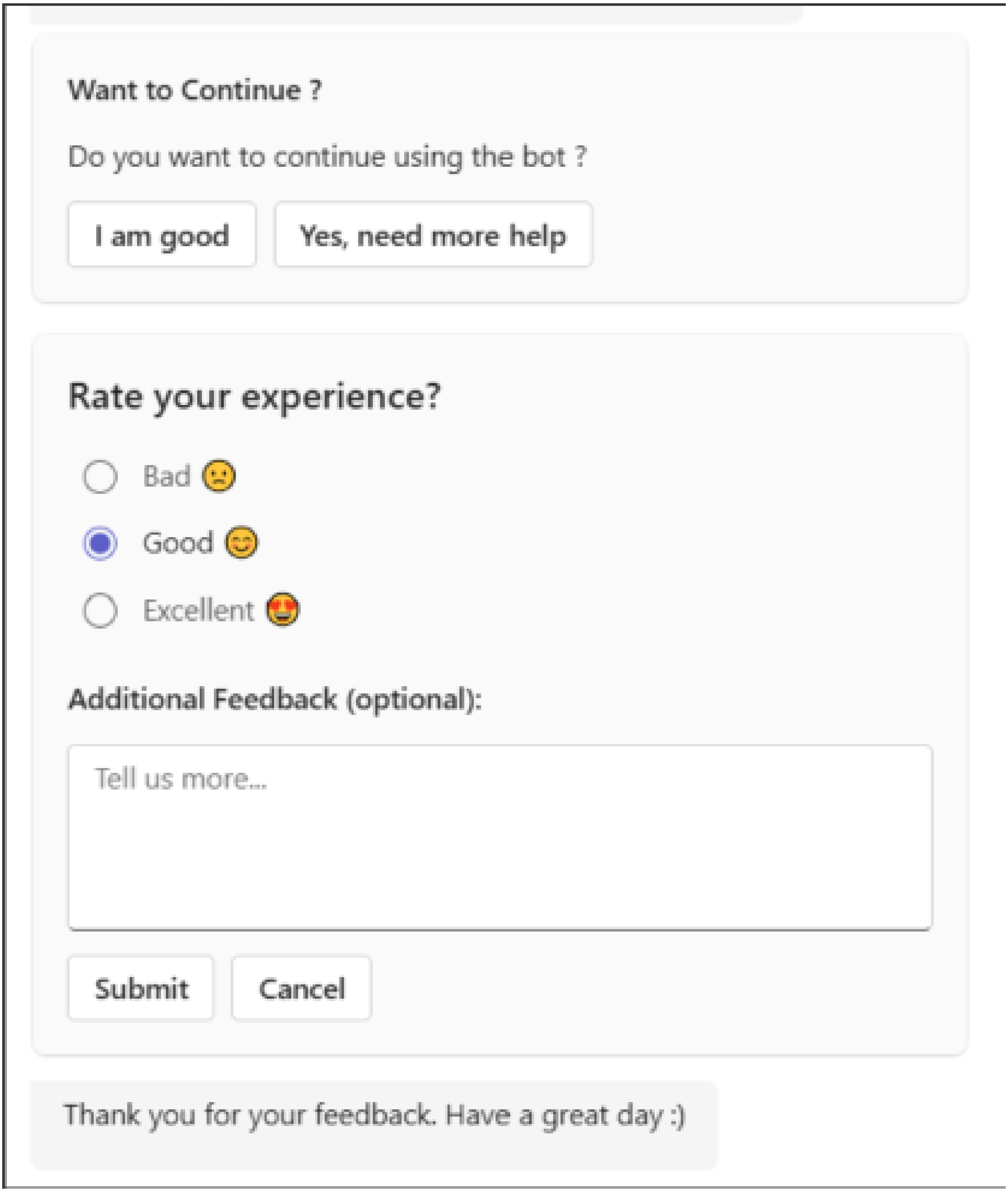
- **Submit a ticket, and track its status** - After you submit a ticket, the bot confirms it with a ticket number. You can check the current status and track the progress from the progress bar. If additional action is required, you can continue from that point.

  Submitting ticket and tracking the status



- **Provide feedback after journey completion** - After the support interaction, rate your experience and optionally add comments. Your feedback helps improve future support.

Feedback after Journey completion



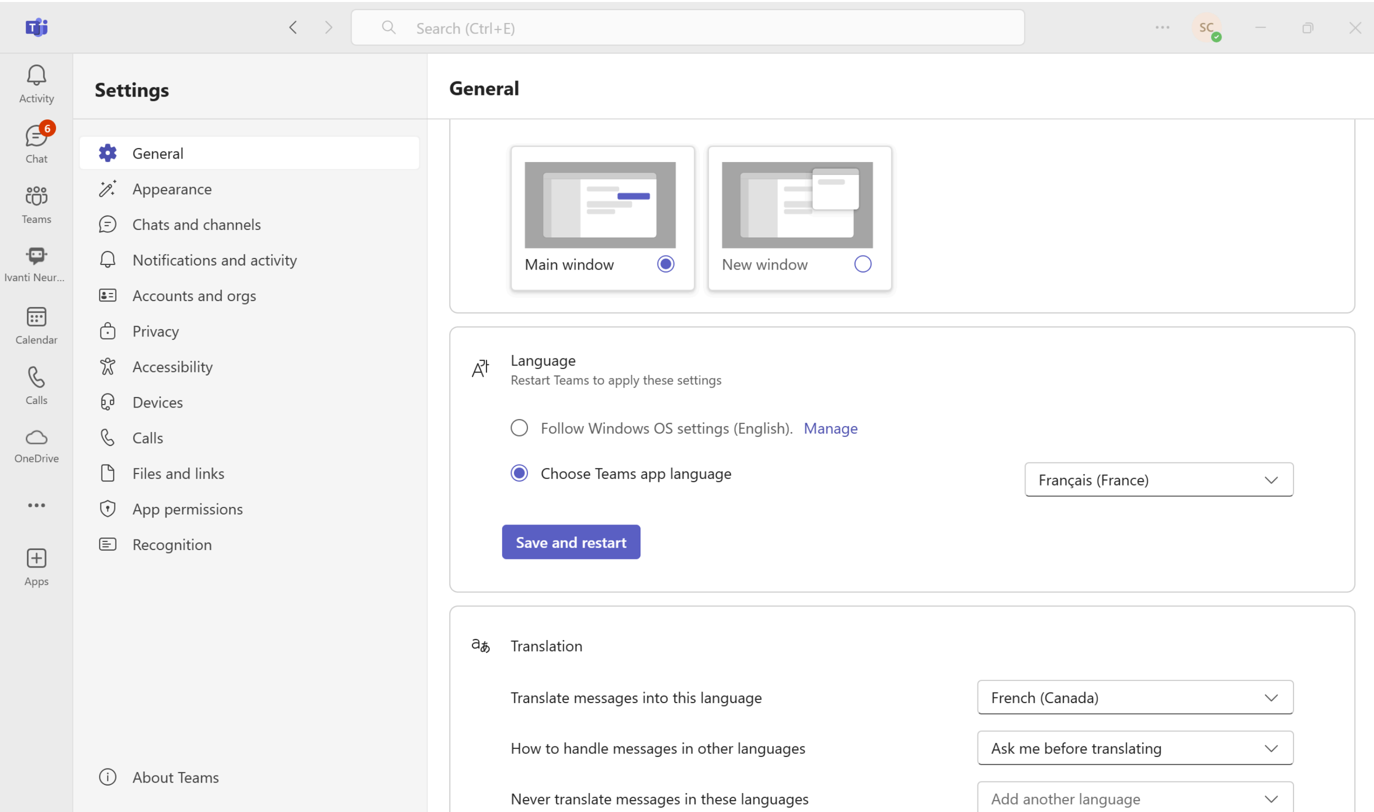
Language Pack Support

The chatbot supports multiple **language packs**. When you select a supported language, the chatbot displays localized content for that language. If a selected language is not supported, the chatbot defaults to English.

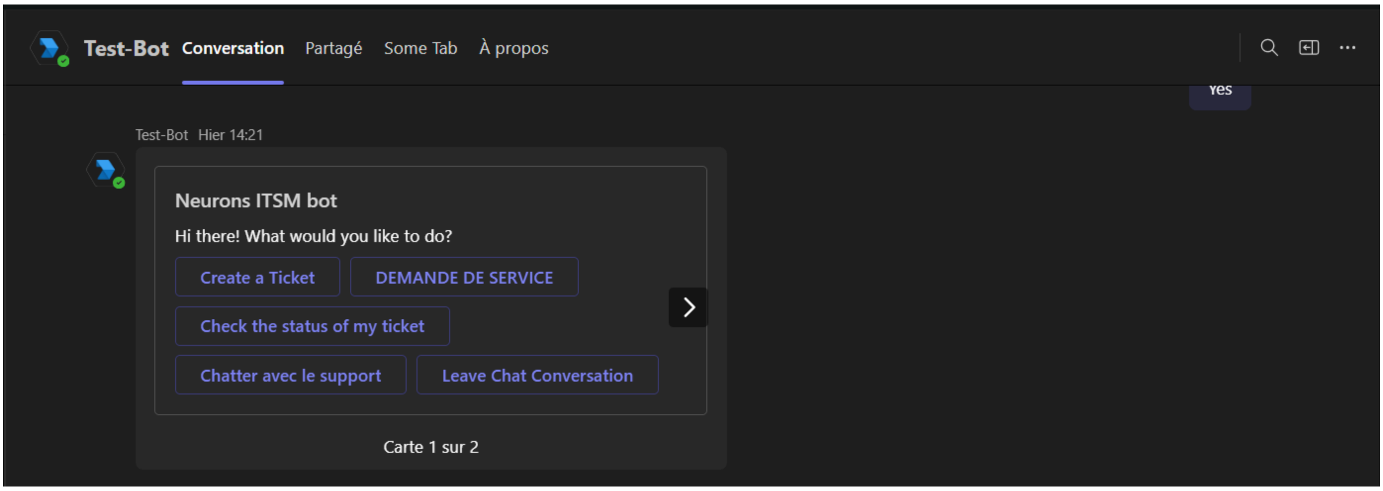
To change the language in Microsoft Teams:

1. Click the ellipsis button ··· (Settings and More options) next to the chatbot.
2. Select **Settings**.
3. In the **General** section, scroll down to **Language**setting > Select **Choose Teams app language**.
4. Choose your preferred language.
5. Click **Save and Restart** .

Changing the Teams App Language in Settings



The chatbot will adapt to the selected language supported. Otherwise, it will continue to respond in English.


Test-Bot
Conversation
Partagé
Some Tab
À propos
Yes
Test-Bot Hier 14:21
Neurons ITSM bot
Hi there! What would you like to do?
Create a Ticket
DEMANDE DE SERVICE
Check the status of my ticket
Chatter avec le support
Leave Chat Conversation
Carte 1 sur 2

12. More Information

Click on the links below for more information:

- Ivanti Software
- Training
- Customer Support
- Contact Us

Getting help

To request help from Technical Product Support, Ivanti Cloud Operations, Licensing Assistance, Customer Care, or to raise a product idea:

1. Go to the Customer Portal and log in: success.ivanti.com/community_home_page
2. Click **GET HELP.**
3. Click **Cloud Platform Request** or one of the other options.

Your Feedback Matters

For questions or comments about the application, including this online help, contact Ivanti Global Support services by logging an incident at:

https://www.ivanti.com/support/ivanti-support.

For urgent matters, call your support services representative for immediate assistance.

Online Help Version

This online help supports   release version: .

Published

13. Untitled

File not found!

14. Untitled

File not found!