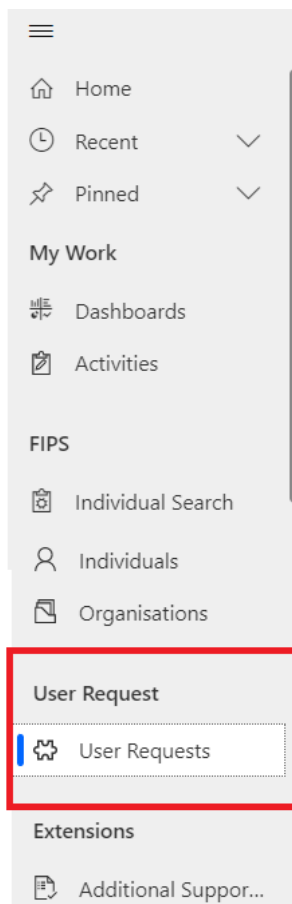


# FIPS QUICK START GUIDE

## User Request Handling

**FIPS has new functionality which will enable users to raise requests for support from Skills Development Scotland from within the system. This function is displayed on the Workplace menu under the User Request section. FIPS users can log, review, update and manage requests within this entity in FIPS rather than submitting requests via the online support form on the SDS corporate website. This guidance document will provide details on how to make use of the ticket request function.**

1. To access the user request section of FIPS, click into the User Requests extension on the workplace menu:



- The default view is the 'My Active User Requests' view. Tickets at the statuses: Open, Assigned, Work in progress, Awaiting User Info, Awaiting follow up date, On Hold Monitoring and Resolved will be shown here. Any tickets at Closed status will not be displayed here. A summary of all possible statuses is below:

Open	Ticket has been raised and has not been reviewed by FIPS Support
Assigned	Ticket has now been reviewed and assigned by FIPS Support for action
Work in progress	Ticket is being actively worked on either by FIPS Support or other SDS colleagues
Awaiting follow up date	FIPS Support can set to this if follow up / further action is required internally
Awaiting User Info	Action is required from user that logged the issue. Ticket cannot progress until additional information is provided
On hold monitoring	Put on hold by FIPS Support to monitor e.g., to review if there are other instances of the same / similar nature raised
Resolved	FIPS Support will set a ticket to Resolved when suitable action has been taken to resolve the issue. Users can still update Resolved tickets and FIPS Support can reopen if required
Closed	Tickets can be set to closed by users or FIPS Support. Ticket handling is complete, and issue is resolved. Resolved tickets will automatically go to Closed status after 7 days of being at Resolved. Closed tickets cannot be reopened or edited

- The standard options (email a link, refresh, export, etc) will be displayed in each view within URH. These functions can be used as required – some standard options may contain no information e.g., run report will be blank as there are no system reports related to the URH function:



- When the default view opens, each active request raised will be displayed with the following column headers – name, title, requested by, request status, and created on:

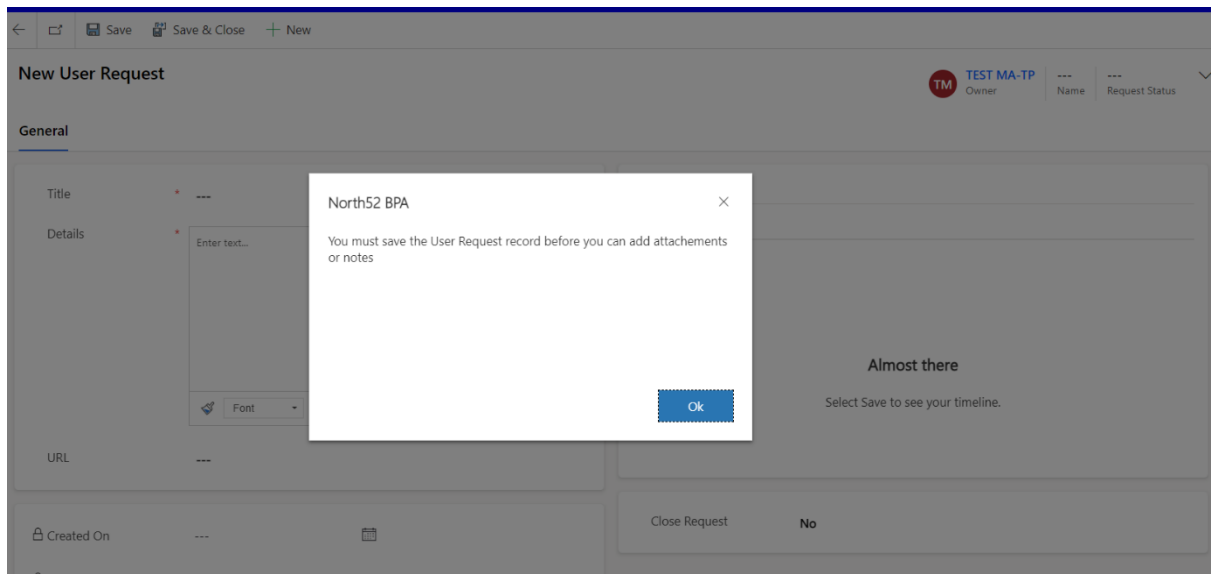
Name	Title	Requested By	Request Status	Created On
URH_FIPS-001121	Error with application	TM TEST MA-TP	03. Work in progress	28/11/2022 11:16
URH_FIPS-001118	Issue with COC record	TM TEST MA-TP	07. Resolved	23/11/2022 15:19
URH_FIPS-001117	Quick Create as TP	TM TEST MA-TP	07. Resolved	23/11/2022 10:52
URH_FIPS-001115	Individual Record Update	TM TEST MA-TP	07. Resolved	23/11/2022 10:49
URH_FIPS-001112	Error on Individual Search page	TM TEST MA-TP	06. On Hold Monitoring	22/11/2022 15:14
URH_FIPS-001105	Incorrect IPP	TM TEST MA-TP	01. Open	22/11/2022 09:15
URH_FIPS-001104	Pending Claims	TM TEST MA-TP	02. Assigned	22/11/2022 08:43

- To create a new ticket, click on +New on the top menu to open a blank request form.
- To view the details of an existing ticket, click on the name field hyperlink to open.

The name field is automatically generated by FIPS to populate a reference number for the request. This cannot be edited or changed by users

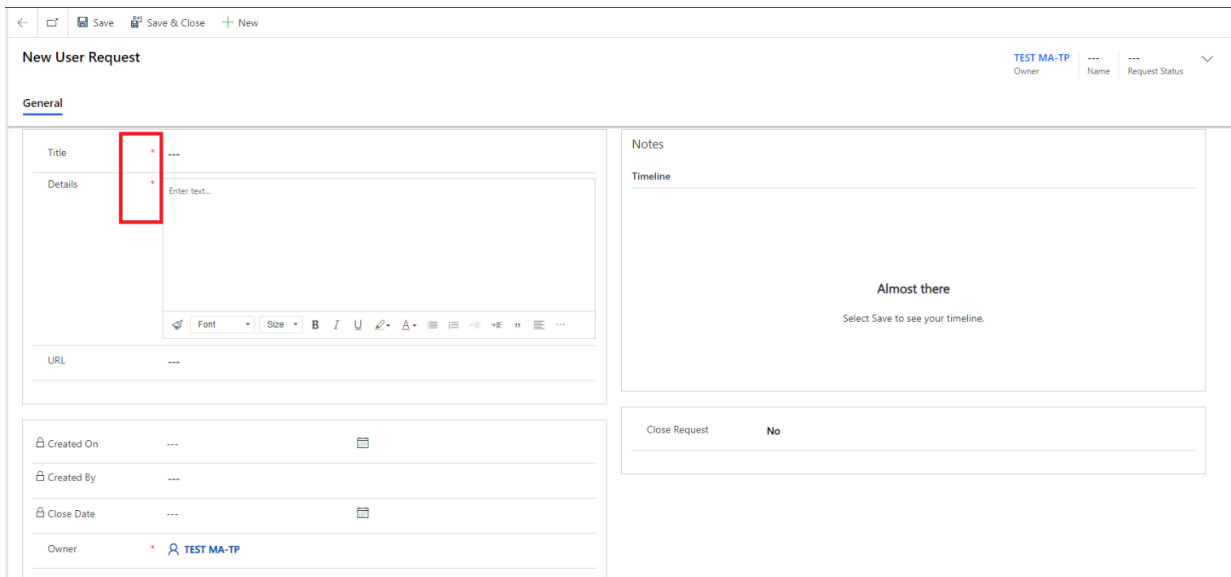
Raising a new ticket from the URH entity

Use the '+New' button to open a blank form. The following message will be displayed each time a form is opened via the URH entity:



- Click on OK to navigate past this notification

All fields marked with a red asterisk are mandatory and the form cannot be saved until these fields are complete. A blank form is shown below:



To submit a request form, complete the mandatory details.

- Input a title that provides a general summary of the request
- In the details section, input full details of what the issue is and any relevant participant information that will enable SDS to investigate the ticket
- The URL field can be used to provide a link to a record in FIPS if required e.g., a link to a specific participant assignment, an individual, a COC record etc.

The screenshot shows the 'New User Request' form. At the top, there are navigation buttons: '<', 'Save' (highlighted with a red box), 'Save & Close', and '+ New'. Below this is the title 'New User Request - Unsaved'. The 'General' tab is active. The form contains the following fields:

- Title:** Issue with saving application details
- Details:** Hi  
I am having a problem saving the application for the following participant - Andrew McAllan  
The save function is not being displayed properly and I am unable to continue with the submission.  
Can you assist?
- URL:** ---
- Created On:** ---
- Created By:** ---
- Close Date:** ---
- Owner:** TEST MA-TP

On the right side, there are sections for 'Notes', 'Timeline', and a 'Close Request' button set to 'No'.

- Once the details have been added, click on Save. To add an attachment or document to the ticket, **save must be clicked first**. Once saved, the timeline section will become active, and attachments or documents can be added here
- Use the paperclip to attach any relevant documents or screenshots

The screenshot shows the 'URH\_FIPS-001123' User Request form after it has been saved. The top navigation bar includes buttons for '<', 'Save', 'Save & Close', '+ New', 'Deactivate', 'Refresh', 'Check Access', 'Assign', 'Word Templates', 'Run Report', and 'Share'. The form title is 'URH\_FIPS-001123 - Saved User Request'. The 'General' tab is active. The form contains the following fields:

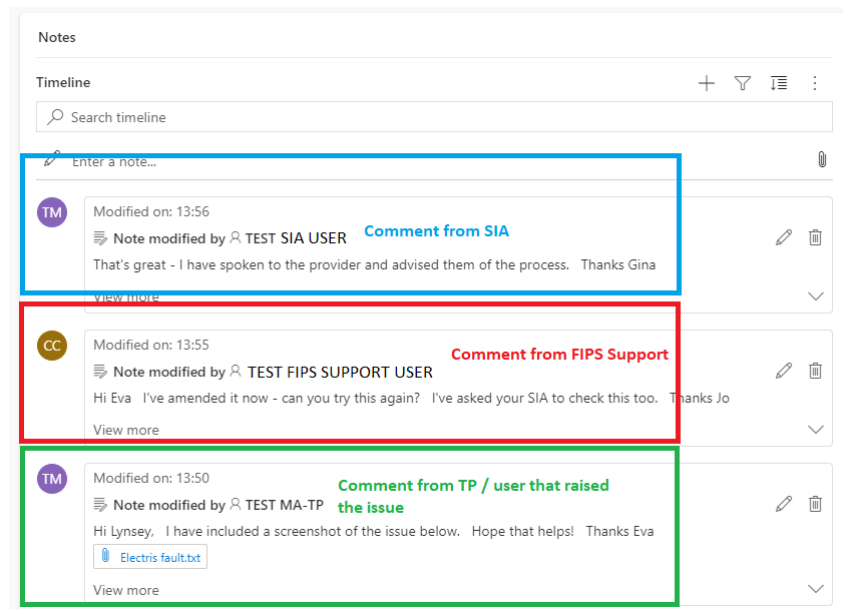
- Title:** Error on COC record
- Details:** Hi  
The following error is returned when processing this COC - can you advise?  
Thanks  
Cindy
- URL:** https://sdsfipsuat.crm4.dynamics.com/main.aspx?appid=af8bfc2...
- Primary Email:** TEST.MA-TP@skillsdevelopmentscotland.onmicrosoft.com
- Created On:** 28/11/2022 17:18

On the right side, the 'Timeline' section is active, showing a search bar and an 'Add an attachment' button (highlighted with a red box). Below the timeline is a 'Get started' section with the text 'Capture and manage all records in your timeline.' and a 'Close Request' button set to 'No'.

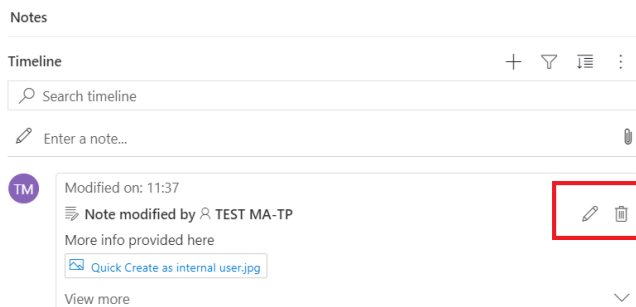
- To include any uploads, ensure “Add note” is clicked when attaching which will successfully update the ticket
- Once the form is saved, the request status will go to Open. The request will now be visible to Skills Development Scotland
- The FIPS Support team will use the **Notes Timeline** section to add comments / updates and communicate with the requestor to resolve the ticket

Notes / Timeline

The notes timeline section is where comments, document uploads and updates can be input. This is where the person raising the ticket can put additional information as required and FIPS Support can provide updates. The timeline below shows an example of comments between SDS and the user that raised the ticket:



- The timeline will hold a record of all the comments made by the user and SDS as well as any documents attached e.g., screenshots.
- Any details input via the timeline can be edited or deleted by the user. To edit or delete a note, use the icons highlighted below:



## Sections of the request form

URH\_FIPS-001033 - Saved  
User Request

URH Support Team Owner   URH\_FIPS-001033 Name   02. Assigned Request Status

General Related

Font   Size   **B**   *I*   U

URL   ---

Primary Email   \*   TEST.EF-TP@skillsdevelopmentscotland.onmicrosoft.com

**Get started**

Capture and manage all records in your timeline.

Created On	09/05/2022	📅	14:08
Created By	🔍 TEST EF-TP		
Close Date	---	📅	
Owner	* 🏠 URH Support Team		

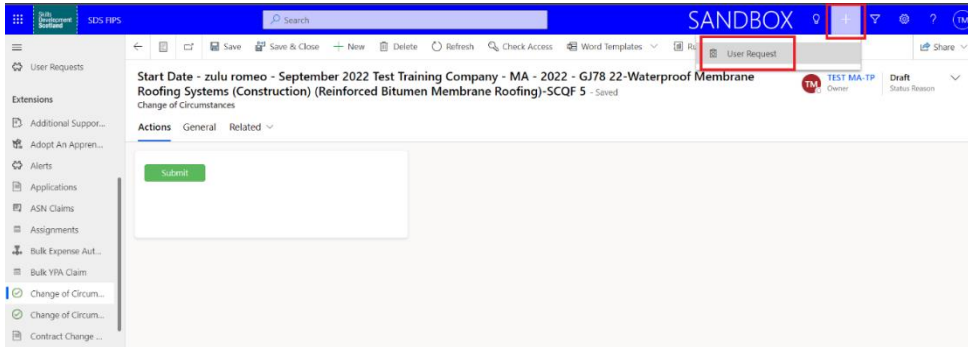
Close Request   **No**

- At the top righthand side of the form, the Owner, Name and Request Status will be displayed
- The primary email field will be auto populated by the system when a form is submitted
- All fields with a padlock symbol are auto populated by FIPS and cannot be edited
- If raising a request on behalf of a colleague, ensure you include this information in the Details section. FIPS Support can then amend the owner of the record to that individual
- The 'Close Request' dropdown is located at the bottom of the form. This should be used by the requestor when a form has been input in error or action is no longer required by SDS. **Setting the ticket to Closed will remove it from the FIPS Support view and no further action will be taken. Once closed, users can no longer edit the request or make further changes.**

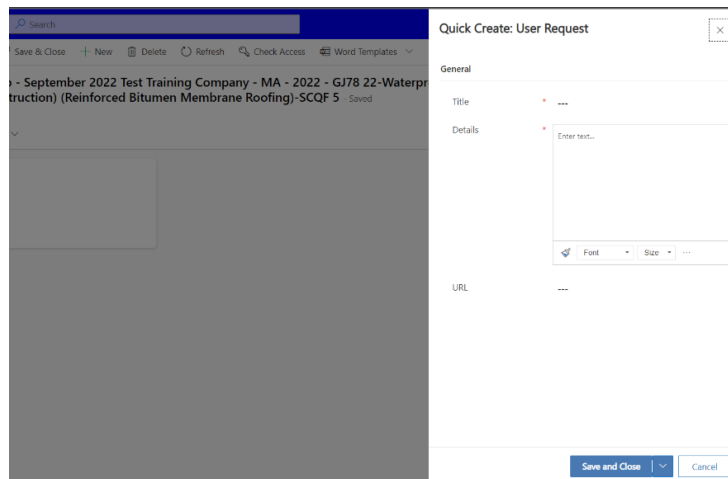
## Ticket Quick Create function

When navigating FIPS, users will have the ability to submit requests for support in other areas of the system. For example, when in a Change of Circumstance record, if an error is returned, a ticket for support can be submitted from this record directly.

On the main ribbon bar, use the “+” sign to access the user request option:

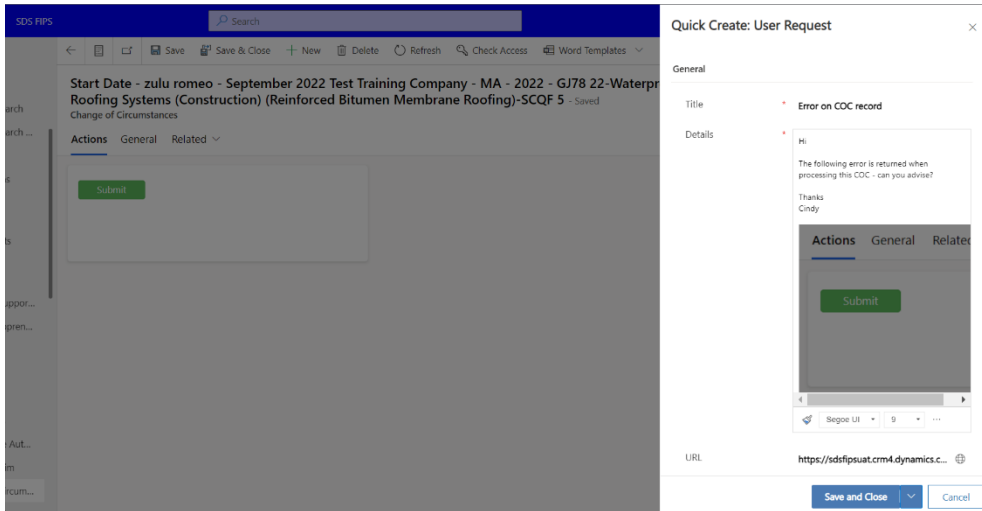


- In the screenshot above, a COC record is displayed as an example. The “+” icon is available across most record types in FIPS.
- Click on the User Request option to open the form from within the record.

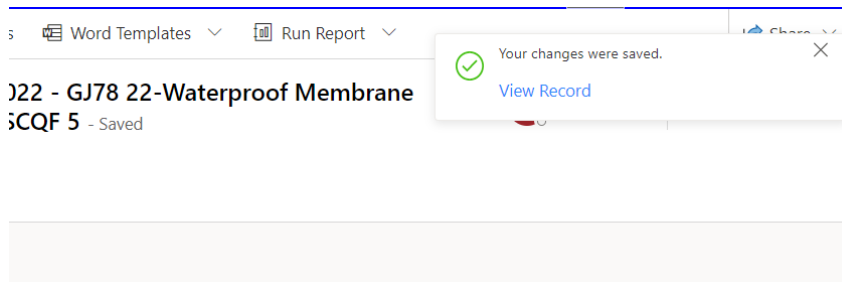


A condensed version of the form will be displayed on screen. Enter the relevant details – title and details sections are mandatory. Provide information relating to the issue and include a link to the record using the URL box if relevant. Screenshots can be added into the details section – use the “Ctrl + V” function on your keyboard to paste a screenshot / snip into the details section.

The screenshot below shows a completed request form using Quick Create:



- once all information has been added, click on Save & Close. A confirmation message will be displayed when submitted:

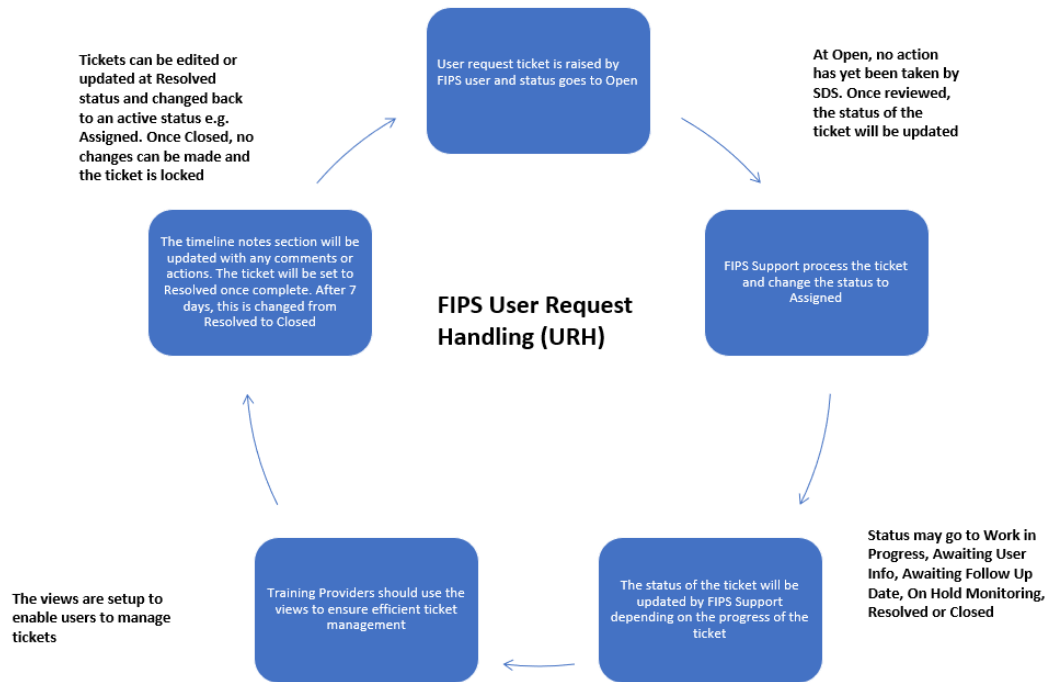


Any tickets created using the Quick Create function will be visible in the URH entity in FIPS. Once a ticket has been submitted either using Quick Create or from the URH entity directly, the ticket lifecycle sequence will begin.

### Ticket lifecycle

The ticket handling lifecycle is shown below. Once a ticket has been resolved for 7 days, it will automatically go to Closed and no changes can be made. The ticket and timeline / notes section become locked for editing and no updates can be made to the request.





### System views (Training Providers)

The table below provides information on the standard system views in the URH entity and what these are for.

View Name	What the View Shows
00. My Active User Requests	Requests raised by the user that are not Closed (e.g., Open, Assigned, In Progress, Resolved etc)
01. All User Requests Made by Me	All requests raised by the user including Resolved and Closed (e.g., all statuses)
02. All User Requests Made by Me and My	All requests raised by user and team (e.g., all users within an organisation) including Resolved and Closed tickets
03. User Requests Awaiting Information	Tickets that have been actioned by SDS - set to <b>Awaiting User Information</b> status and the requestor must now review / provide relevant information on the ticket via the timeline to progress the request
04. User Requests with New Notes	Tickets that have had comments or updates in the last 2 days. Users should now check to ensure all updates have been seen
05. Closed User Requests	Shows all tickets that are now closed (complete) no changes can be made, and the status cannot be changed. These tickets are locked

- The system views should be used to manage the tickets efficiently. The first 3 views contain tickets raised by a user or group at various statuses. These have been split into 3 separate views for ease of use. The default view “My Active User Requests” should be used as the main area where users can view, update, and manage active requests. Closed tickets will not be shown in this view as these are not ‘active’.
- Views 03 and 04 are for ticket management purposes – the Awaiting User Info view will display any requests that have been set to this status by SDS. No action will be taken by FIPS Support while a ticket is at this status. The responsibility is on the user to ensure these are reviewed and any additional details or information provided which will enable the ticket to be progressed as soon as possible. Once additional information has been received, the status will be changed from Awaiting User Info to a different status which will remove the request from the 03 view.
- View 04 will display any ticket that has had notes added to the timeline within the last 2 days. After this time, the ticket will no longer show in this view. Training Providers should use the My Active User Requests view as the central place to manage all active requests, ensuring they are checked regularly for any updates or comments.

### Personal views

Users can create their own views using the Create View button or the Advanced Find filter and save these. The standard views should provide enough detail in the first instance however additional fields etc can be pulled in when creating a personal view, if required for management information purposes.

The screenshot below highlights the Create View and Advanced Find function:

Title	Request Category	Requested By	Request Status	Status Updated On	Created On	Modified On
Change of Circs issue		TEST MA-TP (Offline)	08. Closed	28/11/2022 11:32	28/11/2022 11:19	28/11/2022 11:32
Error with application		TEST MA-TP (Offline)	03. Work in progress	28/11/2022 15:56	28/11/2022 11:16	28/11/2022 15:56
Individual record update		TEST MA-TP (Offline)	08. Closed	23/11/2022 15:37	23/11/2022 15:24	23/11/2022 15:37
Issue with COC record		TEST MA-TP (Offline)	07. Resolved	25/11/2022 09:44	23/11/2022 15:19	25/11/2022 09:44

Users should make use of all the standard system views for ticket management purposes as well as management information (reporting) if required. For example, users can export tickets to excel for internal reporting purposes. There are additional support materials available for URH that users should make use of.