UPU Service Desk Portal

User Guide

version 2023

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About this document

Intended audience

This user guide is intended for staff of the Universal Postal Union (UPU) and postal operators who want to request assistance on new services or fix issues encountered on existing services.

 Important:

- Only the UPU Service Desk Portal can be used to ask for support. Support will not be provided via email.

- The UPU recommends using Google Chrome when accessing the portal. The portal does not support Internet Explorer.

How to use this manual

This document describes how to navigate the UPU Service Desk Portal to request a service or report an incident. For information on:

- service requests, see "Service requests" on page 9.

- incidents, see "Incidents" on page 14.

- how to search in the knowledge base, see "The Knowledge Base Search function" on page 17.

- how to use the Show me function, see "The Show Me functions" on page 18.

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Introduction

Definition

Service request

A service request is a formal request from a user for something to be delivered. It is raised when a user requires access to a new UPU service, assistance, or advice on upgrading an existing IT service. Each request has a unique identifier: RFS_yyyymmdd_nnnn, where:

- **RFS**: Request for Service
- **yyyy**: year the request was created
- **mm**: month the request was created
- **dd**: day the request was created
- **nnnn**: number

Incident

An incident is an unplanned interruption of service or reduction in the quality of a service. When something does not work exactly the way it is meant to be, it causes unplanned interruptions to the service and creates an incident. UPU Support needs to provide a quick fix that resolves the interruption and restores the service to its full capacity.

Each incident has a unique identifier: IN_yyyymmdd_nnnn, where:

- **IN**: Incident
- **yyyy**: year the incident was created
- **mm**: month the incident was created
- **dd**: day the incident was created
- **nnnn**: number

Task

A task is an action or a list of actions to be completed by the person responsible for a dedicated activity.

Knowledge Base (KB)

A Knowledge Base is a repository of information on frequently asked requests. The knowledge base makes it easy for users to find solutions to their problems before asking help from UPU Support.

Log in/out from the UPU Service Desk Portal

1. To log in to the UPU Service Desk Portal, follow the process described in the UPU website: https://www.upu.int/en/Contact-us/IT-support.

The system logs you out of the portal automatically after fifteen minutes of inactivity.
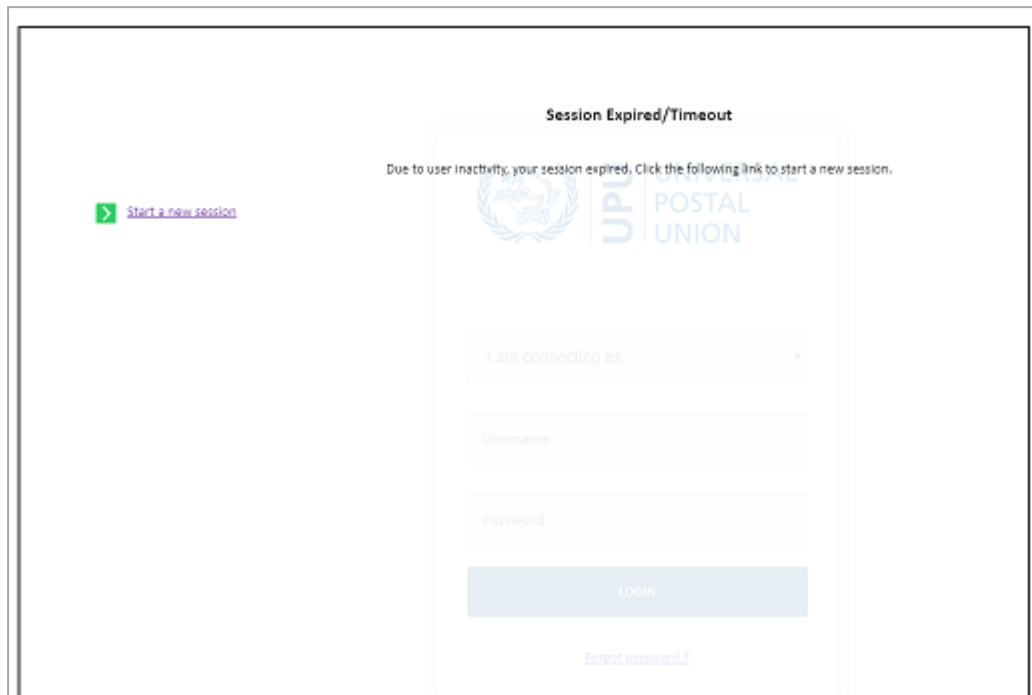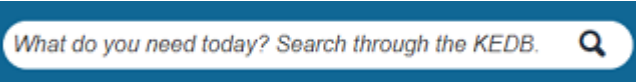
The home page

After logging in, the home page is displayed.

Functions available

SERVICE DESK HOME	From anywhere in the portal, click any of these options to bring you back to the home page.
SERVICE CATALOG	Click this to access the UPU Service Catalog.
(icons with 7 and 1 badges, dashboard icon)	Click one of these buttons to check and validate your service requests or incident tickets, or view the dashboard.
EN	The default language interface. Click this button to change your preferred language. Languages supported are: English (EN), French (FR), and Spanish (ES). You need to log out and log in again to apply the selected language.
Demo PTC Customer	Identity of the logged-in user.
(logout icon)	Click this button to log out of the application.
News	Click this to access or search for news.
What do you need today? Search through the KEDB.	Click this field to enter the criteria for searching entries in the knowledge base.
Contact us	Click **Contact us** if you want to provide suggestions or feedback about the UPU Service Desk Portal.
SUBMIT REQUEST	Click this button to create a new service request.
REPORT INCIDENT	Click this button to report a new incident.

SHOW ME	Click this button to access all your service requests, incidents and assigned tasks.

Service requests

Service catalog

Click **SERVICE CATALOG** in the header to access the service catalog.
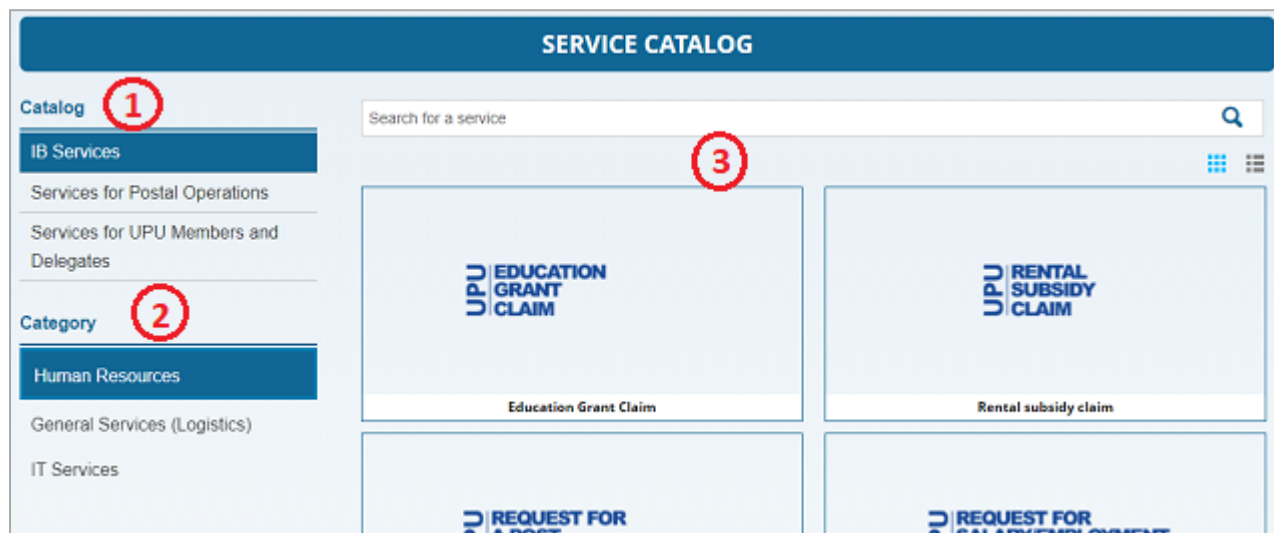

The **Service catalog** is organized into three sections:

1. Catalog of services

2. Categories of services

3. Available services based on the selected category

There are three service catalogs available.

Services	Description
IB Services	Services available only for International Bureau (IB) employees. There are three categories of IB services: 1. Human Resources 2. General Services (Logistics) 3. IT Services
Services for postal operations	Services linked to postal software products developed by the UPU on behalf of designated operators, postal organizations, and others. For this type of service, an IB staff member can raise a request for someone else.
Services for UPU Members and Delegates	Services provided for UPU members and stakeholders such user registration, circulars, LAHSO, and others.

Services	Description
	For this type of service, an IB staff member can raise a request for someone else.

To access a service, select the catalog, and then select the category of services associated to the selected catalog. All services associated with this category will be displayed. You can display the services as cards or tables by clicking these two icons at the top right of the page.

Access to service catalogs depend on one's user rights. The portal displays the message, "*You do not have access to this Catalog*" if your profile does not have sufficient rights to access the content of the selected catalog. For example, the "UPU member and Partner" profile does not have access to the **IB Services** catalog.

Search for a service

1. Select the relevant catalog and category.

2. In the Search bar, type a word to search from all entries in the active catalog, for example, CDS, to look for CDS entries.

3. To clear the search criteria, click the **X** symbol on the Search bar.

4. If no entry in the Service catalog matches your criteria, you can submit a new request by clicking the **Can't find what you're looking for?** button.

Service requests

Create a request for an IB service

This section applies only to all internal UPU staff.

For illustration purposes, we will raise a request for a new laptop.
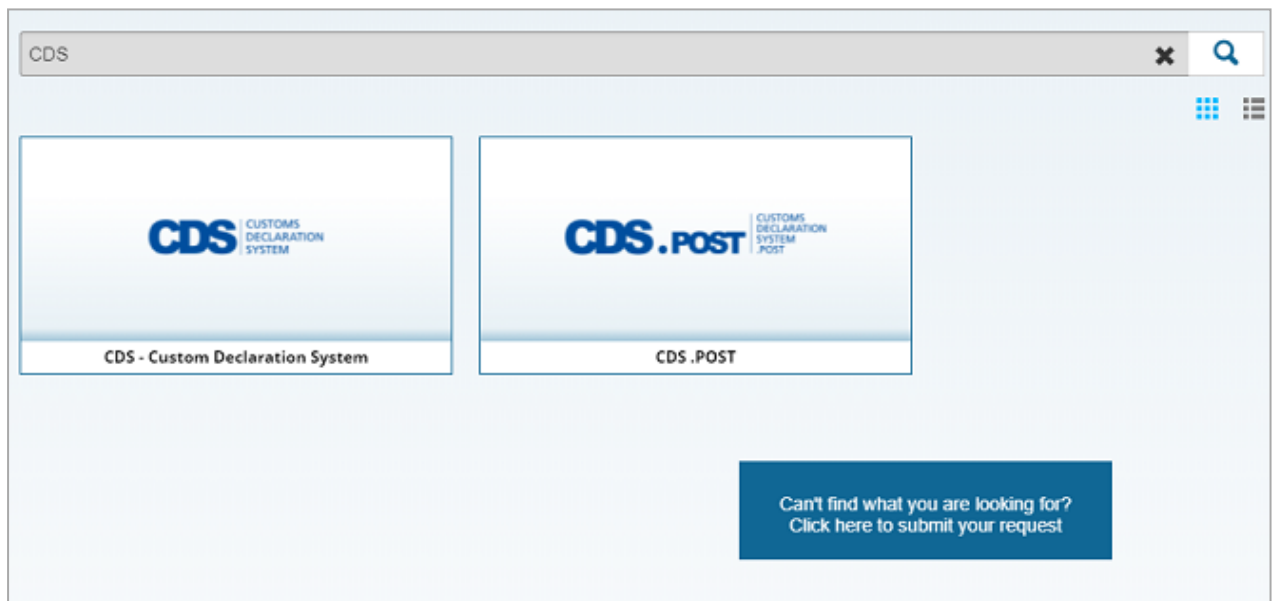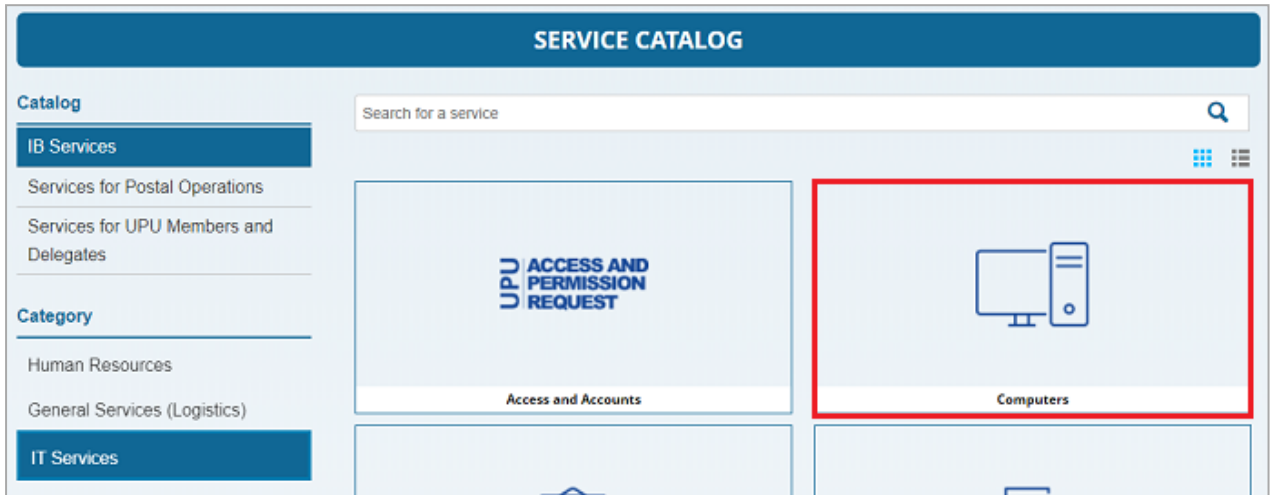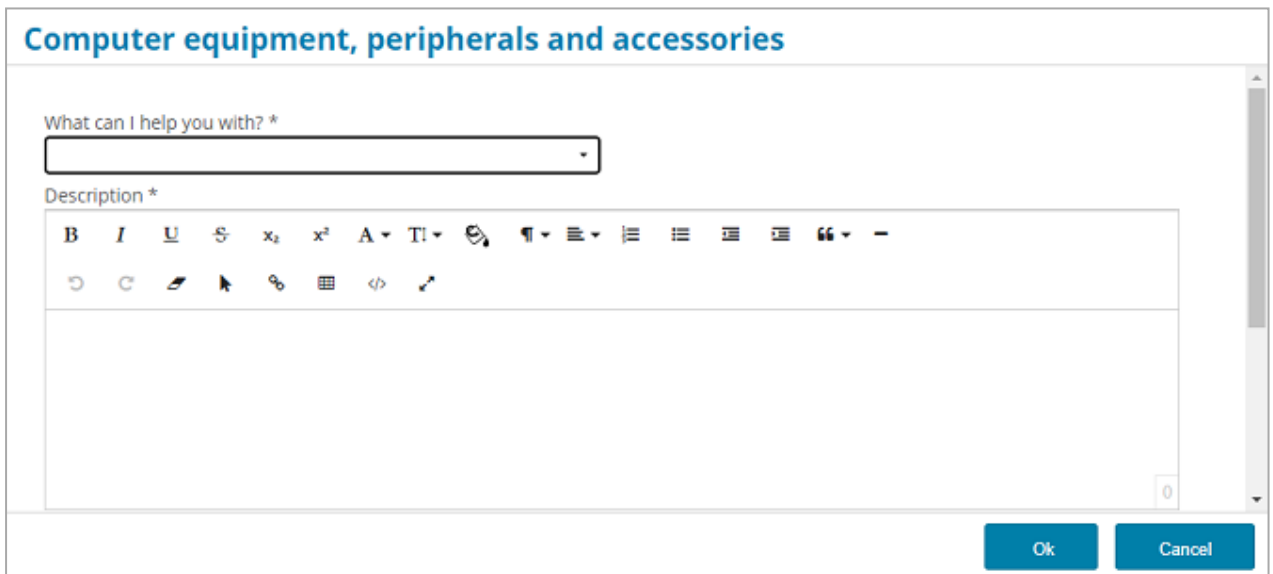
1. Log in to the UPU Service Desk Portal.

2. Click the **SERVICE CATALOG** option in the header. By default, the **IB Services** catalog is selected. Leave it unchanged.

3. Select the **IT Services** category. The available services are displayed.

4. Since we are raising a request for a laptop, click the **Computers** card.

5. Click **New Request**. A new window appears.

6. Specify what the request is about by selecting from the drop-down list.

7. Enter a description of the request.

8. Assign the level of urgency.

9. Optionally, you can attach documents to support your request before clicking **Ok**. The system displays a confirmation message and notifies you via email that your service request has been registered.
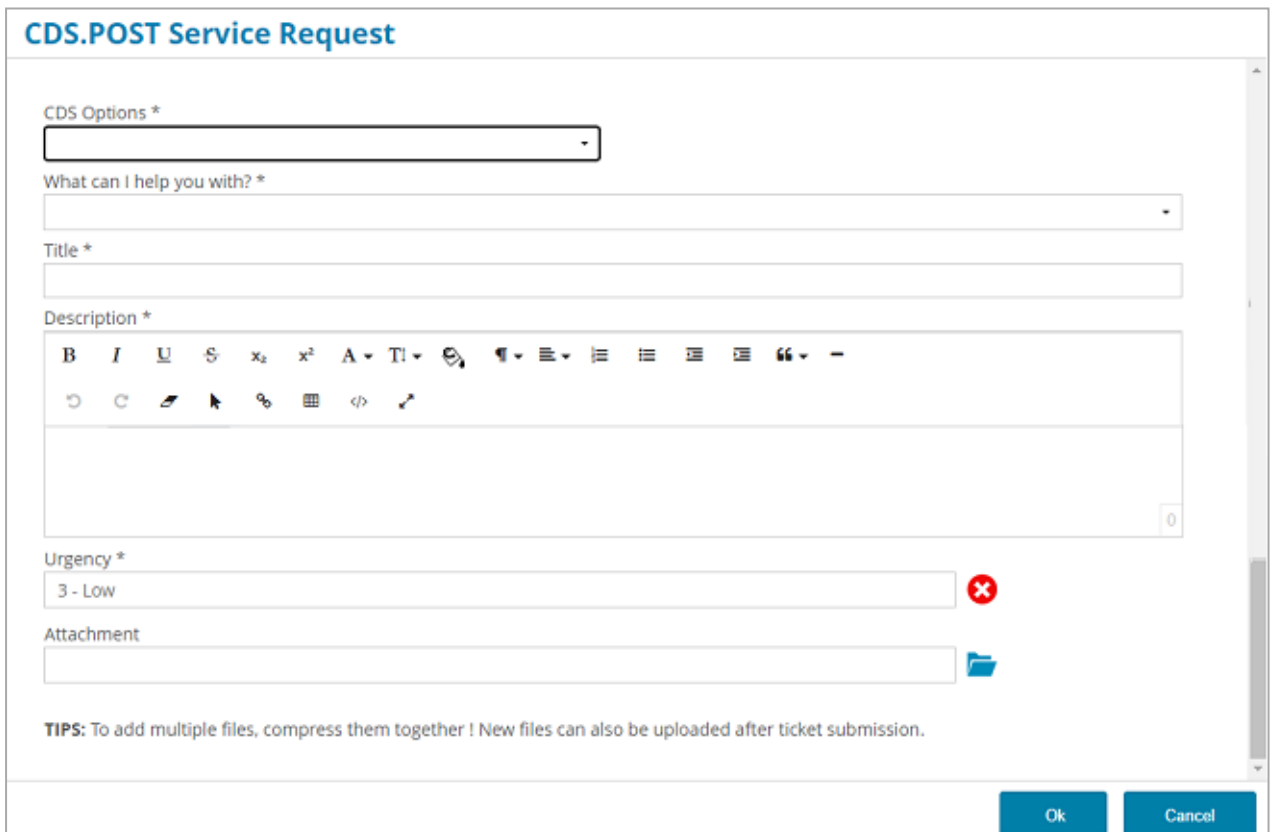
Create a request for a postal operations service

Use this section as a reference to submit a service request if you are a postal operator or a UPU customer.

1. Click the **SUBMIT REQUEST** button from the UPU Service Desk Portal home page.
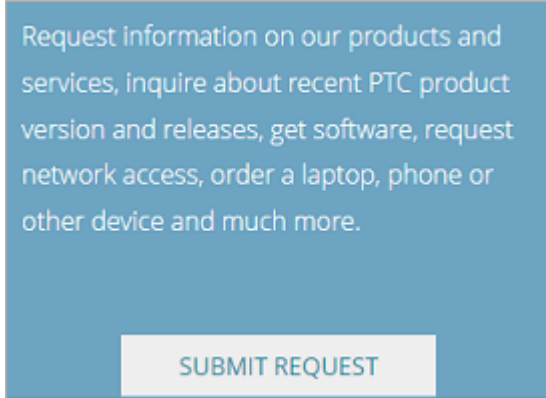
2. Select the **Services for Postal Operations** catalog and the relevant category to display the available services then click the desired service. Alternatively, you can do a search directly as described in "Search for a service" on page 10.

3. Click the **New Request** button to fill out the request form. The fields in the upper portion of the form vary depending on the service you select. The fields on the lower part of the form, starting with the **Title** field, are the same for all forms, regardless of the service chosen. Fields marked with an asterisk (*) are mandatory.

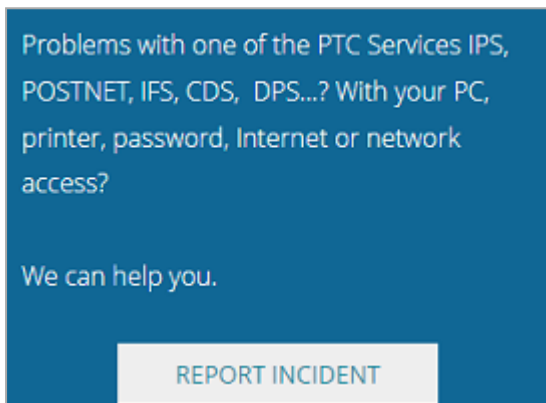 You can format the description using the formatting tools. You can also attach a sup-

porting document as necessary.

4. After entering the information, click **Ok** to confirm. You will receive a confirmation email from noreply@upu.int with the reference of the request. No further action is required from you.

Incidents

IB employees can report incidents on behalf of others. External users, such as the staff of postal operators or UPU customers, are not permitted to do so. They can only report incidents they experience or are directly involved in.

Create a new incident

1. Log in to the UPU Service Desk Portal.

2. Click the **REPORT INCIDENT** button from the home page.

3. Enter details of the incident. Fields marked with an asterisk (*) are mandatory.

InfoSec incident	Check this box to report an Information Security incident. The UPU Service Desk Portal notifies the: • Support team to close the incident as soon as possible • Security Incident Manager (SIM) to alert

	the Information Security Response Team (SIRT)
Service Category	Select the service category from the drop-down list.
Requested by	If you selected **Services for Postal Operations** or **Services for UPU Members and Delegates** in the **Service Category** field, this field is displayed with your name as the default value. If you are an IB employee reporting an incident on behalf of someone else, select the name of the person from the drop-down list.
Impacted Service	Select the appropriate service impacted by the incident from the drop-down list. The options available in the list are the services for which you are eligible to raise an incident request. This is dependent on your organization's license agreement with the UPU. You can filter the entries of the incident catalog by typing text in the **Search name** field.
Title	Type the title of the incident.
Description	Describe the incident in details.
Urgency	Assign the incident an urgency level. See "Urgency, Impact, and Priority" below.
Impact	Select the impact of the incident from the drop-down list. See "Urgency, Impact, and Priority" below.
Attachment	Attach supporting documents as necessary.

4. Click **Ok**.

Urgency, Impact, and Priority

An incident's priority is usually determined by assessing its impact and urgency: **Urgency** is a measure of how quickly a resolution of the incident is required. Impact is a measure of the extent of the incident and of the potential damage caused by the incident before it can be resolved.

- **Impact**: Show stopper, Major or Minor
- **Urgency**: High, Medium or Low
- **Priority**: Critical, High, Medium or Low

The priority is calculated accordingly.

| Priority		Urgency		
		High	*Medium*	*Low*
Impact	Show stopper	Critical	High	Medium
	Major	High	Medium	Low
	Minor	Medium	Low	Low

The Knowledge Base Search function

The **Knowledge Base (KB)** is a repository of information for services and incidents. You can find out whether information about a service/incident already exists before raising it.

Search for an entry

1. In the Home page, enter a word in the **HOW DO I?** field, then press **Enter** or click the **Search** icon. The system performs the search.
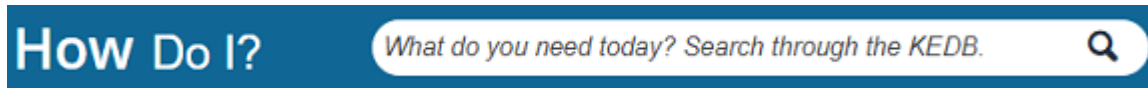
If there are services or incidents that correspond to your search criteria, the UPU Service

Desk Portal displays it. Otherwise, no information is shown.

The Show Me functions

Overview

At any time, you can access your service requests, incidents, or opened tasks from the Home page by clicking the relevant icon from the application's header.

	Click this icon to view the progress of service requests and incidents you have submitted.
	Click this icon to access all service requests and incidents pending validation.
	Click this icon to display a graphical representation of the total number of tickets (requests or incidents) received over a 12-month period and how these numbers are broken down into different categories.

Alternatively, you can access and view the status of all your service requests and incidents by clicking the **SHOW ME** button in the home page.
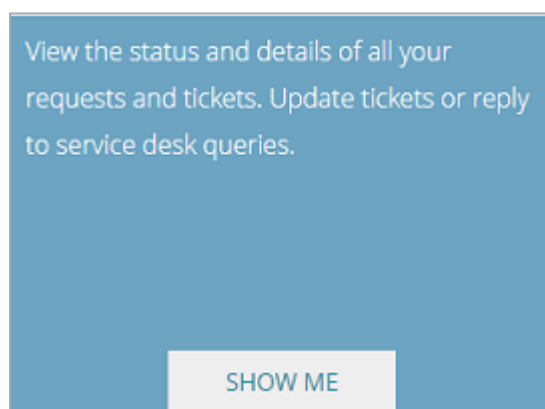
The UPU Service Desk Portal displays the **ALL TICKETS** section with tabs for incidents and requests, resolved tickets awaiting confirmation, and dashboard.
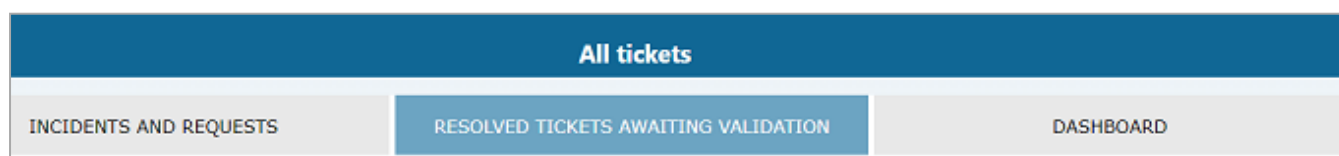


Click the relevant icon or tab to display:

- all incidents and requests regardless of the status
- all tickets awaiting confirmation
- the dashboard showing incidents and requests submitted over 12 months in a graph form

📝 The referenced time zone in the request/incident is set to Bern, Switzerland's time zone, the Central European Time (CET).
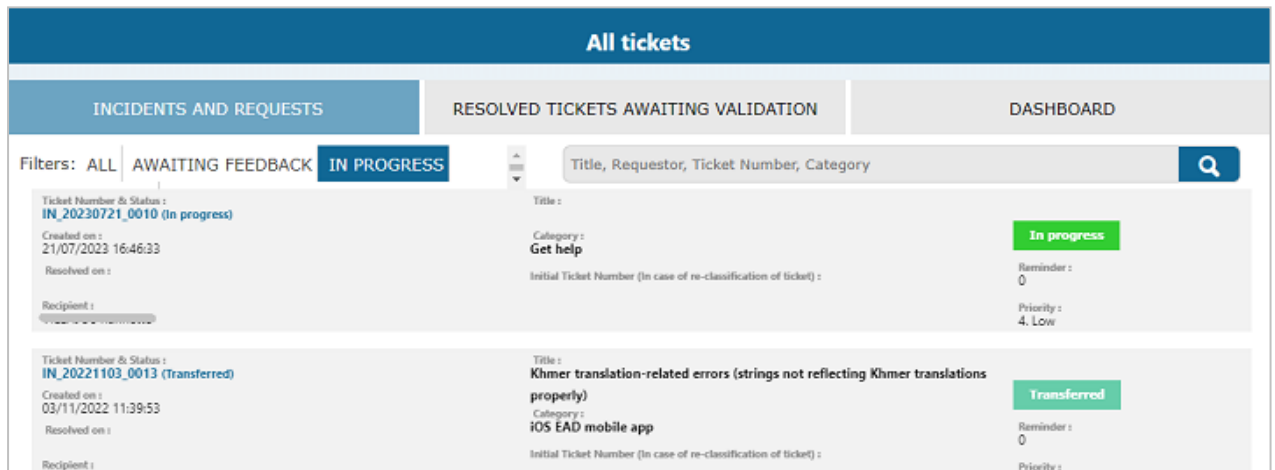
Update details of a service request/incident

You can update your submitted request/incident at any time while it is still in the "In progress" status.

1. Filter entries by entering your criteria in the field.
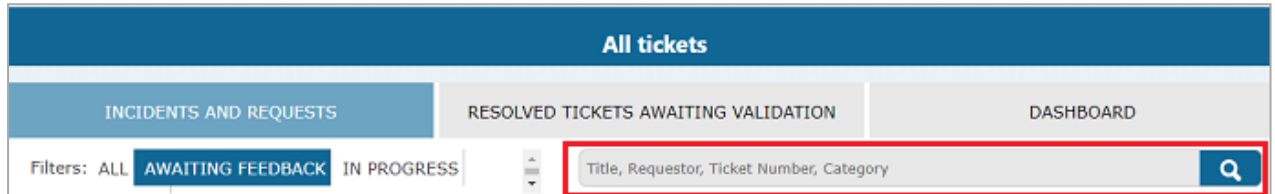
The UPU Service Desk Portal displays results that correspond to your search criteria.

2. Click on the ticket number to access the details of the request/incident. Details of the request/incident are displayed.

The page displays information on the:

- status of the request/incident

- history or the actions that have been performed on the request/incident

- action that can be performed on the request/incident

3. Click the **Update** button to open a window where you can enter changes to the description of the ticket and upload documents.

4. To view details of an entry, click the relevant Search icon with a cross in the **Comment** column. To close the details, click the **X** icon.

5. To view details of any problems linked to the request/incident, click the **Problems** tab.

6. To access the uploaded files or upload a new file for an entry, click the **Attachments** tab. You can open the existing file by clicking on the document name, and upload a new one by

clicking the **Attach** button.

7. In the **Description** field, enter remarks about the attachment before clicking **Upload File**.
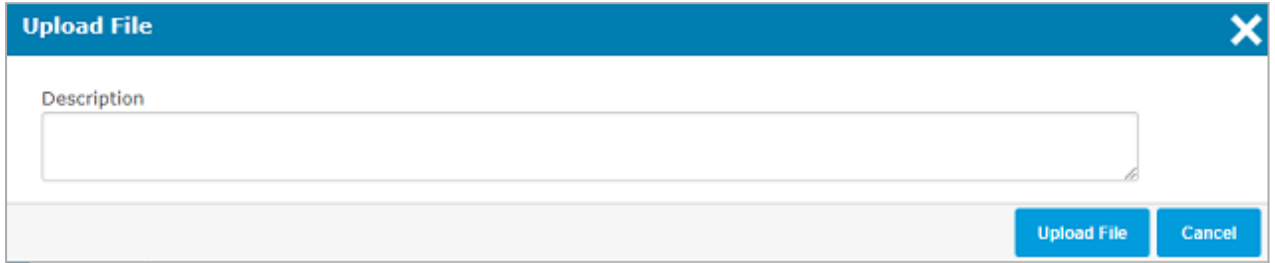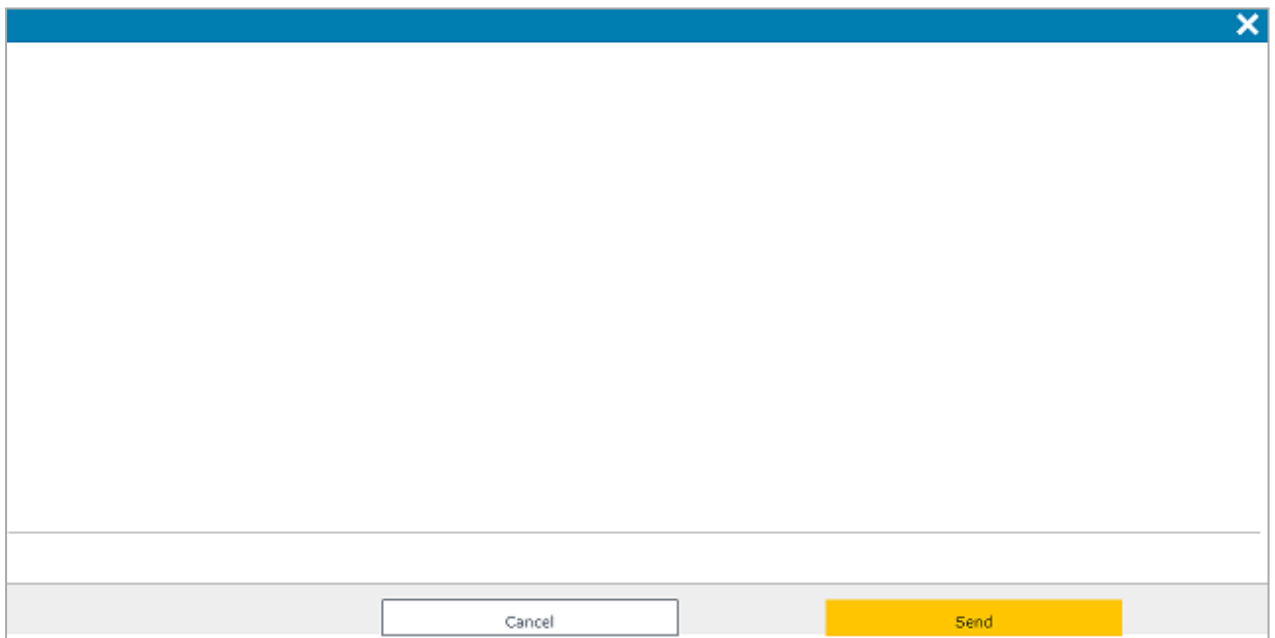

A new entry is added to the list in the **Attachments** tab.

Close the request/incident

You can close your request/incident at any time while it is still in the **In progress** status.

1. Open the relevant request or incident.

2. Click the **Close** button.

3. Enter remarks about the closure in the **Closure Details** box.

4. Click **Send** to confirm the closure, otherwise, click **Cancel**. Once sent, a new entry is added to the **History** tab and the request/incident status is set to **Closed**.

✏ While the request/incident is processed, the Support team may ask you to perform some tasks in line with the request/incident's approval or resolution. You can access details of the request/incident using the edit icon.

Approve the request/incident

If the incident has been resolved or the service request has been fulfilled according to your requirements, the request/incident status is set to **Solved** and you are requested to approve the request/incident.

1. Click the **RESOLVED TICKETS AWAITING VALIDATION** tab. All requests or incidents awaiting confirmation from the requestor are displayed here.
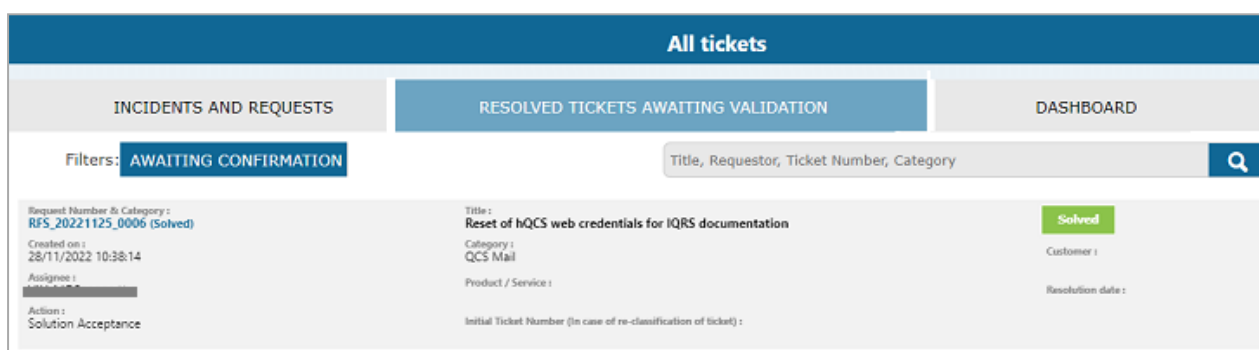
2. Filter or search then click on the relevant ticket to approve.

3. Click the **Approve** button in the window that appears.

4. Enter remarks about the approval in the **Comment** box then click the **Ok** button.

Approve

Comment

5. Click **Ok** to approve the request/incident. The request/incident status is set to **Closed** and a new entry is added to the **History** tab.

    You can also cancel the approval process by clicking **Cancel**. The UPU Service Desk Portal prompts you for cancellation.

Reject the request/incident

If the incident is not resolved to your liking or your particular service request is not fulfilled, you can reject the solution.

1. Click the **RESOLVED TICKETS AWAITING VALIDATION** tab.

2. Filter or search then click on the relevant ticket to reject.

3. Click the **Reject** button. The Rejection window is displayed.

Reject

Comment *

4. Enter remarks about the rejection in the **Comment** box then click the **Ok** button.

5. The request/incident is "reopened" and a new entry is added to the **History** tab.

   You can also cancel the rejection process by clicking **Cancel**. The UPU Service Desk Portal prompts you for cancellation.

Notifications

While your request/incident is processed, the UPU Service Desk Portal sends a notification:

- with the reference of the request/incident as soon as you submit it

- when the request/incident is assigned to the support team/support team member

- to request an action (i.e. approval) or information (i.e. log files)

News

UPU can communicate information to its end users through the UPU Service Desk Portal. You can access a history of all published news or view the active news using the News bar.
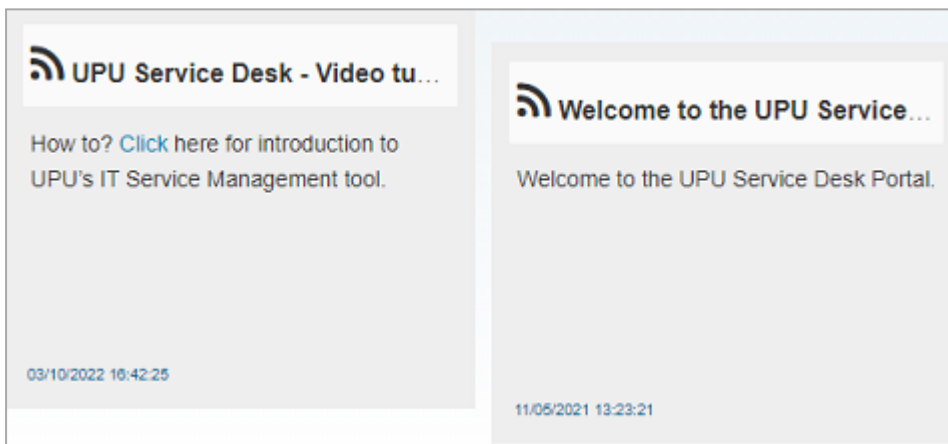
Access the news history

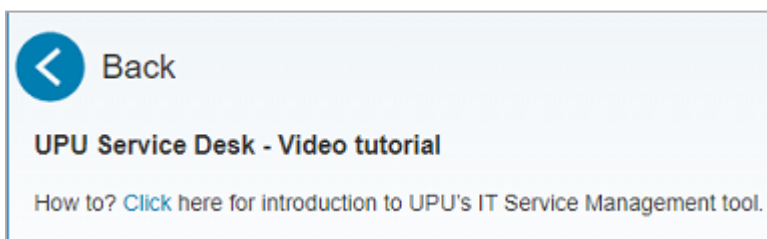1. In the Home page, click **News** in the News bar.
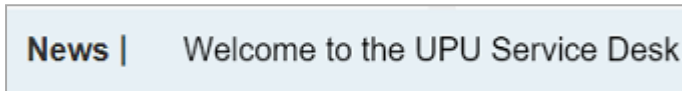
   The history of all published news is displayed.

2. Click in the news box to access the full text.

3. To go back to the full list of news, click the **Back** arrow.

Access the active news

The last five news are displayed one by one at a regular frequency.

1. Click on the title of the active news to access the full text.

2. Click **X** to close the window.