FLDS Customer Portal User Guide

Logging Into the Customer Portal

1. Go to https://flds-servicedesk.myflorida.com.
2. Enter your User ID and Password when prompted. Contact the FLDS Service Desk at (850) 487-1746 if you need assistance logging into the portal.

3. The portal Home Page will appear upon successful login.

Header Details

View User Profile

The current user's ID will appear at the top/right of the site header. The following options are available by clicking the arrow outlined in the below image.
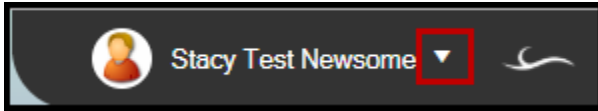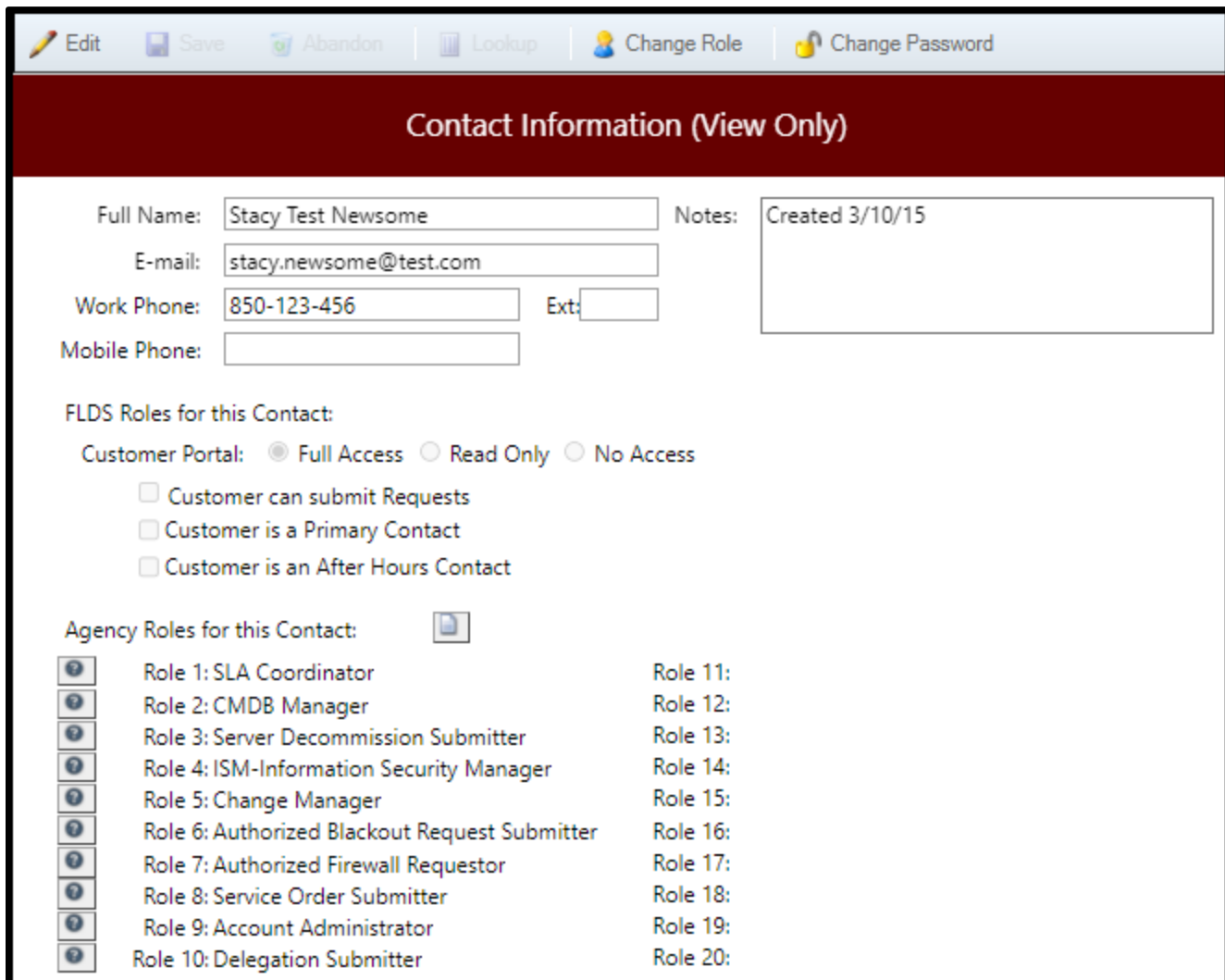
New Browser Window

The **New Browser Window** button opens the portal in another tab without requiring a second login. This allows the user to have multiple site pages open concurrently.

My Profile – Reset Password

Selecting **My Profile** opens the current user's customer contact record for editing. **Note - Only certain fields may be edited by the user. There is also the option to **Change Password** on the record's toolbar which prompts for the current password and the new password. You click the **Edit** button before making changes.

Logout

To logout of the site, click the **Logout** option or close the browser window.

Home Page Details

Search the FLDS Knowledge Base

The below button will prompt for the entry of a keyword or phrase. Knowledge articles containing the entered keyword or phrase will be availa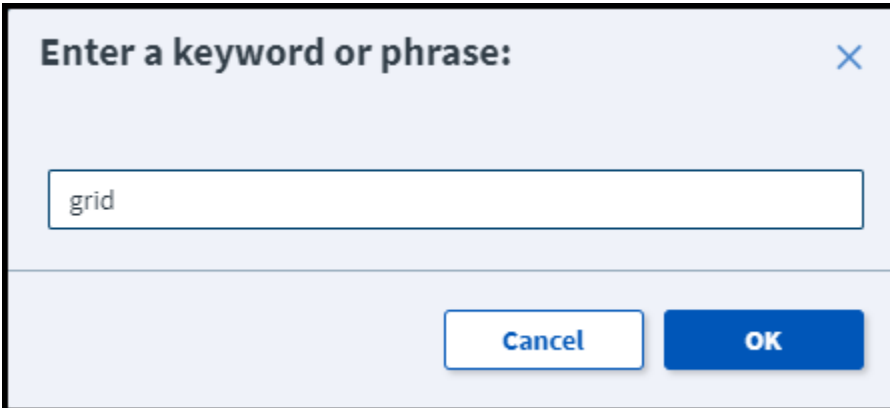ble for selection. Knowledge articles include frequently asked questions as well as step-by-step instructions (with screenshots) on how to perform common tasks.

Current List of Available Knowledge Article Topics:

Title
Add a New Application to the CMDB
Exception Workflow Diagram
Export Portal Grids to Excel or CSV File
How to Create and Update Agency Account Information
How to Filter Data in Portal Grids
How to Open New Portal Browser Window
How to Set Criticality on Servers and Applications
How to Submit a Firewall Rule Request
How to Submit a Server Decommission
How to Submit a Service Order
Mark Portal Notification as Read
Modify Change/Release Portal Calendar View
Performing a Wildcard Search
Portal Quick Action to Request a Ticket Update
Portal Quick Actions
Reset Portal Password - Customer Instructions
Server Decommission FAQs
Service Order - Add/Remove CIs from Disaster Recovery
Submit Blackout Request
View Portal Grid in Full Screen
Why Do I See Change/Releases with No Configuration Items

Please contact the FLDS Service Desk to request a knowledge article on a specific topic.

Report an Incident

Click the **Report an Incident** button to submit an incident to the FLDS Service Desk. An incident can also be reported via the **Submit Request** → **Incident** menu item.

Items Pending Agency Action

This displays items requiring action by the agency including pending approvals, configuration item updates, incidents/service requests requiring customer response, etc. Each item displays a (count) of pending actions.

Notifications

The Notifications section includes notices to FLDS customers. Notifications may be related to planned outages, portal changes, the addition of knowledge-base articles, tips and tricks, frequently asked questions, and other information that may be useful to our customers. Notifications are temporarily posted, so please review when you log into the FLDS Customer Portal.

Menu Bar Details
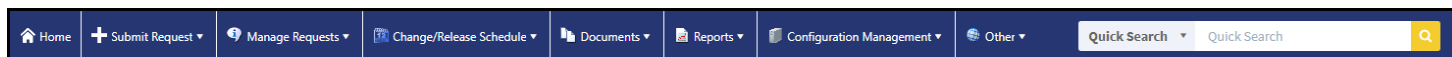
The Customer Portal menu is always visible as the user navigates the site. The available menu items are based on the current user's assigned roles, so the menu options will vary between users. In addition, menu items may be visible even though the user doesn't have the appropriate role to submit the request type.

Unauthorized users will receive an error message when attempting to submit a request without the appropriate permissions.

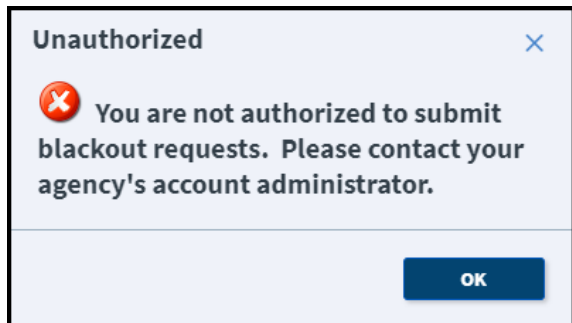## Menu Icons

Icon	Description
➕	Creates a new record.
❗	High priority item.
🔍	Returns search results in a grid.
📅	Opens a calendar.
📚	Opens a document repository.
▶	Appears on the right of the menu item and indicates a submenu. Hover over the menu item to see the submenu.
📄	Opens a report. **Note – Reports must be opened in the Internet Explorer browser.
📊	Opens a dashboard.
🌐	Opens a website.
📕	Opens a .pdf document.

Home

   The Home button returns the user to the Home page.

Submit Requests

Use the Submit Request menu to submit items to the FLDS Service Desk. Upon selection, a new record will appear for authorized submitters. Unauthorized submitters will receive an error message.
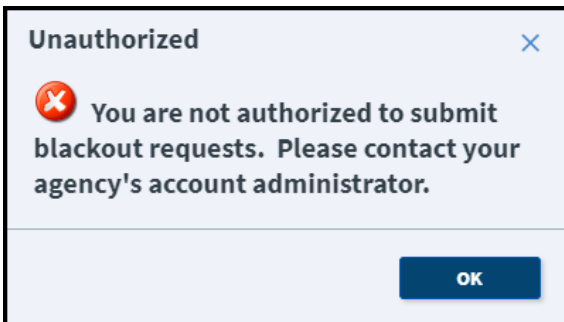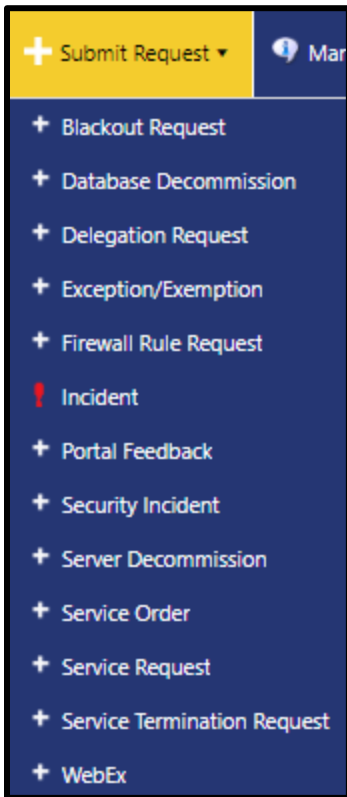
Manage Requests

The Manage Requests section is to review/monitor previously submitted requests.
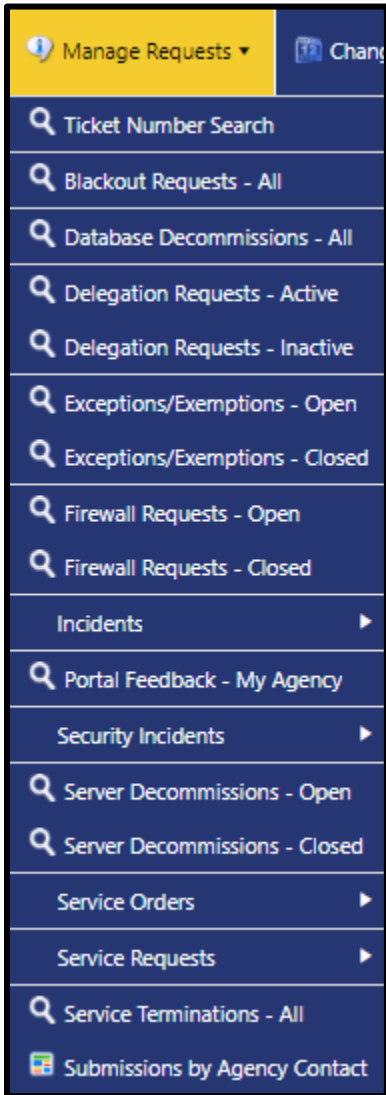
Change/Release Schedule

Includes searches to view change/releases that may impact the customer.

The Change/Release Calendar displays a calendar view of change/releases. Release type visibility can be modified by changing the selections with the Legend to the right of the calendar. Click on a specific month to view results.
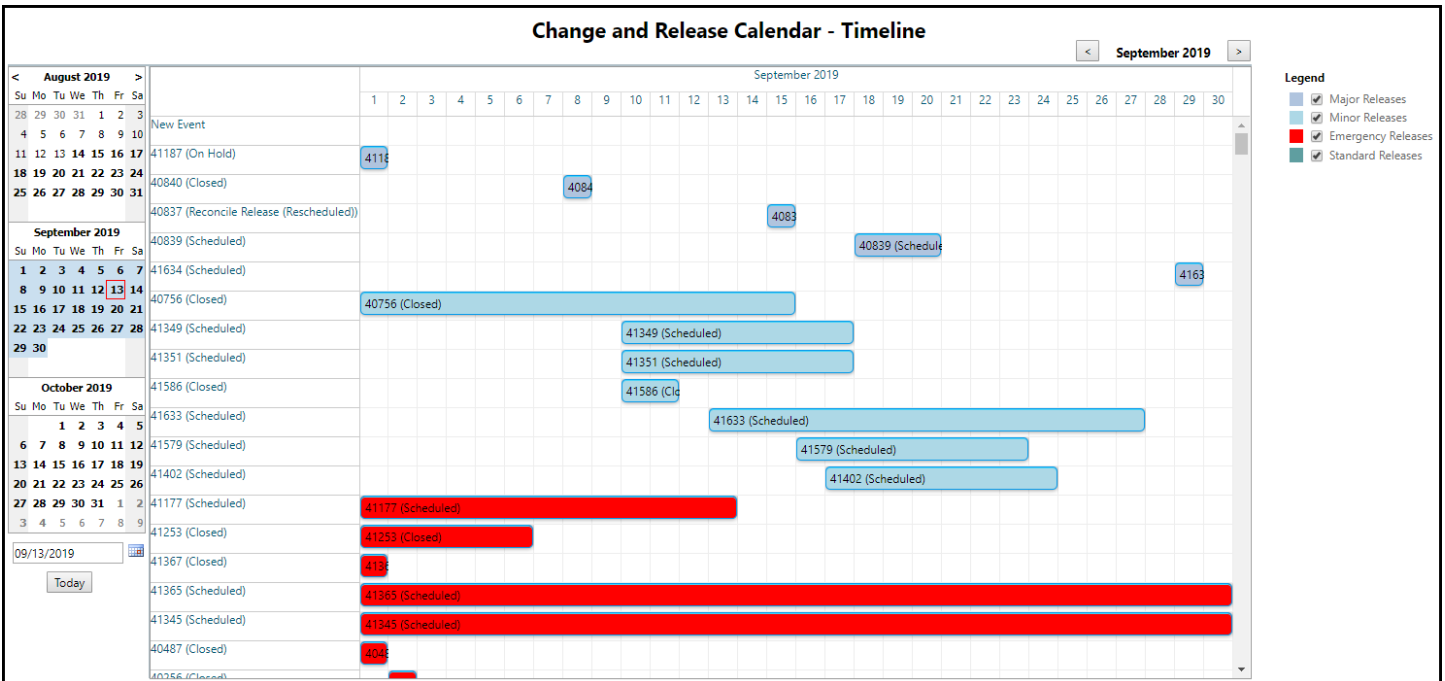
Documents

Provides available document repositories that are used for sharing documents. Authorized users can create folders and add items to the repository. Documents that cannot be emailed are often placed in the agency's document repository.
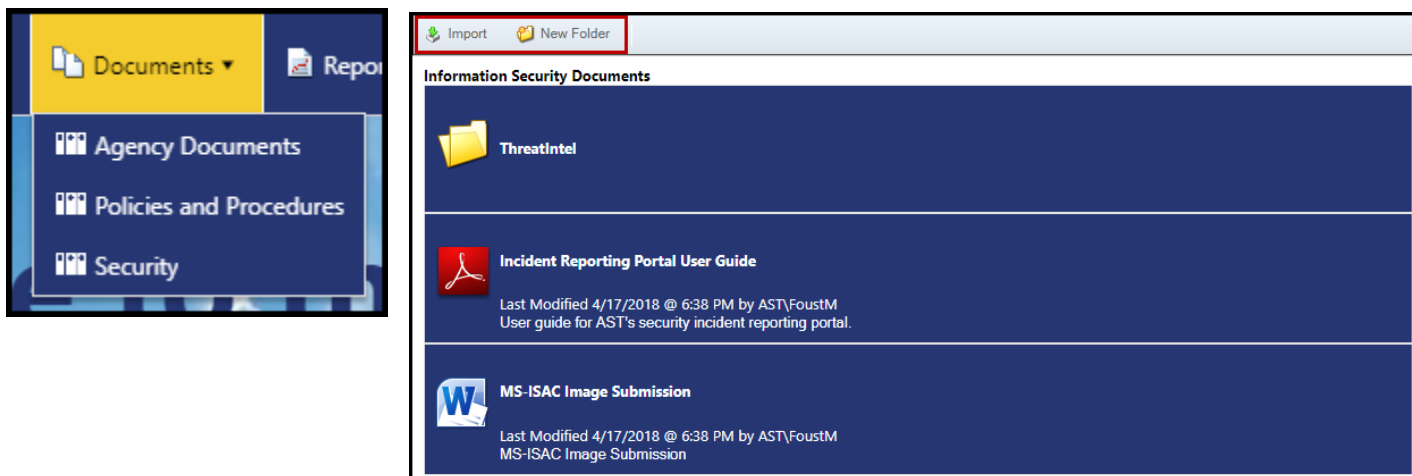
Reports

Includes available reports that can be printed or saved.
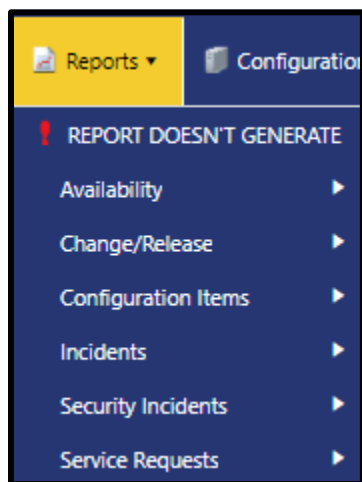
Note – Changes may be needed in browser settings for reports to run. Click the first menu item **REPORT DOESN'T GENERATE for instructions on how to change the browser settings in Internet Explorer, Google Chrome, FireFox, and Microsoft Edge. See below screenshot.

Recommended Actions When Reports Don't Generate

Google Chrome	**Firefox**	**Internet Explorer**	**Microsoft Edge**

1. Click the **Update** button at the top/right and select **Settings**.
2. Select **Privacy and Security** at the left.
3. Click **Site Settings**.
4. Click **Additional Content Settings**.
5. Scroll down to the **Insecure Content** section.
6. Click the **Add** button within the **Allowed to show insecure content** section.
7. Add **https://flds-servicedesk.myflorida.com**.
8. Close Settings tab.

Configuration Management

Includes searches of configuration items owned by the customer agency.

Configuration Management ▾

- Alerts for My Agency's CIs
- Applications - Active
- Applications - Retired
- Applications - Missing Attributes
- Applications - No Criticality Set
- Applications - No Linked Databases
- Applications - No Linked Servers
- Applications - Add New
- Databases - Active
- Databases - Retired
- Databases - Missing Attributes
- Servers - Active
- Servers - Aging Report
- Servers - End of Life Linux/Red Hat
- Servers - End of Life Windows
- Servers - Retired
- Servers - Missing Attributes
- All Configuration Items
- All Active Configuration Items
- All CIs - Missing Attributes
- All CIs - Update Needed
- All CIs - Disaster Recovery
- Annual Criticality Review Due
- Missing Attributes

Other

The Other menu contains miscellaneous items such as Account Management details including portal access/roles for the agency's employees, the Blackout Request calendar, etc.
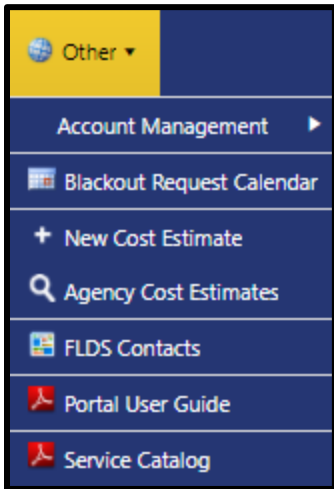
Quick Search

To perform a quick search for a specific record, select the record type from the **Quick Search** options and enter a record number or keyword.
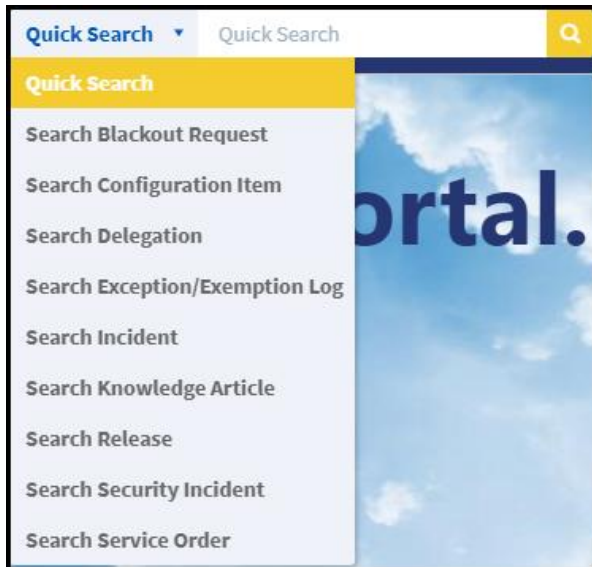
If no record type is selected, all record types will be searched. For example, searching all records for "Print" produced the below results.

Search Results: "print"

Blackout Requests

Blackout Requests containing the text " print ".

Blackout Request ID 2170

Last Modified January 10 @ 3:14 PM by Stacy Newsome

Incidents

Incidents containing the text " print ". Open Incidents only.

226488, In Progress, Priority 3   ⊘ Request Update

Last Modified Thursday @ 2:27 PM by David Bennett
Category: Backup
SubCategory: Request Report or Information
Service Request #   462131
Priority average

Requester Eric Durham

Email   Eric.Durham@floridarevenue.com

Phone   (850) 717-6177

Summary: We need two new backup reports. I would like these reports to be an excel spreadsheet and also a print report if possible.
We need two new

186384, On Hold, Priority 3

Last Modified July 15 @ 10:28 AM by Norma LaMonica
Category: Solarwinds
SubCategory: Add/Modify/Remove Access/Permissions
Please make a ticket for interdepartmental team to complete the request below.

From: Tedder, Brandon
Sent: Monday, September 10, 2018 9:54 AM
To: Foust, Michael <Michael.Foust@ast.myflorida.com>; Kuntz, Clark <Clark.Kuntz@ast.myflorida.com>
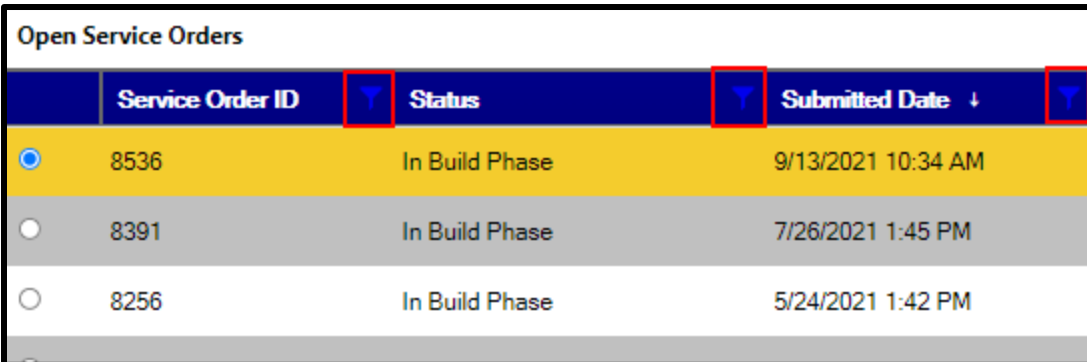Cc: Menz, Christopher <Christopher.Menz@ast.myflor

Modifying Grids

Sort Columns

Grids can be sorted by clicking on the column header. Click the column header a second time to reverse the sort order. Sorted column(s) will have an up or down arrow indicating the column is sorted in ascending or descending order. Click the **Multi-Column Sort** button on the grid toolbar to sort by more than one column.
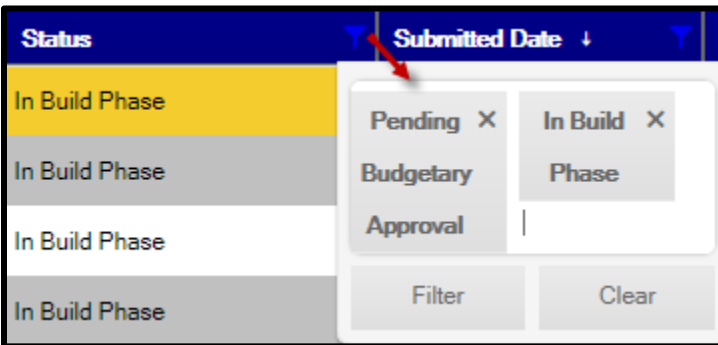
Filter Grid Contents

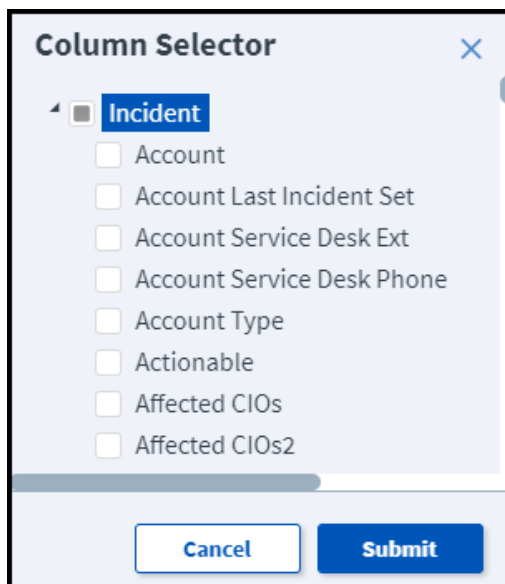Most columns can be filtered by clicking the blue filter icon within the column header.

Depending on the field type, you will be prompted to select from a list of checkboxes or type the filter criteria. Multiple items can be selected or entered. The Category column is filtered to display records in which the column's value is "Cherwell" or "SQL".

Add/Remove Columns

Columns can be added/removed from the grid by clicking the **Columns** button on the grid toolbar. When the Column Selector window opens, click the arrow to expand the list of available columns. Columns can be added or removed by selecting/deselecting the checkbox next to the column name.

These changes will remain when the user next logs into the portal.

Rearrange Column Order

Columns can be rearranged by dragging/dropping the column header to a new location on the grid. Changes made to grid column orders are permanent and will be visible the next time the user logs into the portal.

Exporting Search Results

Click the **Export** button on the grid's toolbar to export search results into a CSV or Excel file. Depending on your browser settings, the file may appear as a downloaded file at the bottom of the browser window and/or within your PC's Downloads folder. The column order and any sorting or filtering that has been applied to the grid will be reflected in the exported file.

## Menu Actions

Request Update
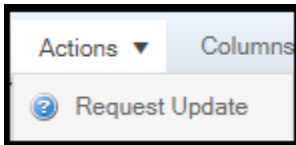
Users can request an update on an incident, service request, and service order by selecting the record within a grid and clicking the **Action** button on the grid toolbar. Select **Request Update** from the Actions submenu.
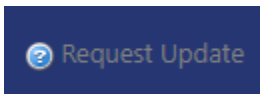
The Request Update option is also available on records returned when a search is performed using the Quick Search menu.

When the Request Update option is selected, the user is prompted to enter additional information that is provided to the FLDS technician. The update request will also be included in the ticket's journal.

Request Reschedule
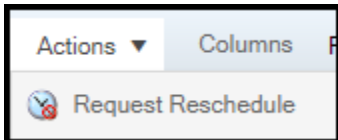
Grids containing scheduled releases will include an **Action** menu item to **Request Reschedule**. When selected, the user is prompted to provide details which will be sent to the release owner and the FLDS Release Manager.

How to Provide Feedback

All users may submit portal feedback to FLDS by selecting **Portal Feedback** within the **Submit Request** menu.