

SAHPRA Service Desk Tips and Tricks

Date: 19 July 2022

Version: 1.68

Drafted by: Peter Lever

Index

How do I get to the SAHPRA Service Desk System?.....	3
I am really battling! Who do I phone?	3
Help! I have forgotten my Password! What do I do?.....	4
Why am I being asked to change my Password?	4
How do I identify Mandatory fields?	5
How do I access Attachments that I previously attached to a task?	5
How do I access a task’s Task Review screen?	5
What is the Dashboard?	6
How do I create a new task?.....	6
I want to follow up! How can I access tasks that I created that are still open?.....	7
I have the task’s Reference number. How do I access the task?	8
I don’t have the task’s Reference number! How do I find the task now?.....	8
How do I change my password?	10
Why does the SAHPRA Service Desk system “Time Out”? How do I get back in?	11
How do I Sign Out of the SAHPRA Service Desk system?.....	11
How do I read the Task Summary?	12
How do I manage my availability on the SAHPRA Service Desk?.....	13
I think that there are FAQs that need to be added to this document! What do I do?	13

How do I get to the SAHPRA Service Desk System?

The SAHPRA Service Desk system can be found at the following URL:

<https://service.sahpra.org.za/Authentication/Default.aspx>

I am really battling! Who do I phone?

Don't panic! For additional support, please contact **Peter Lever** or **Dube Mzimba**. Contact details are provided below.

Peter Lever

Mobile / WhatsApp: +27 83 447 4883

Email address: peter@therefore.co.za

Dube Mzimba

Mobile / WhatsApp: +27 82 772 6235

Email address: dube.mzimba@sahpra.org.za

If Peter / Dube aren't immediately available, please message them via WhatsApp and they will be with you as soon as possible.

Help! I have forgotten my Password! What do I do?

As can be seen from the image provided below, the SAHPRA Service Desk System’s home page carries two buttons, “Sign In” and “Forgotten Password”.



Should you have forgotten your Password, click the “**Forgotten Password**” button on the left-hand side of the home page, capture your email address to the “Email address” text box, click the “Send” button and follow the instructions provided.

Why am I being asked to change my Password?

To ensure that the SAHPRA Service Desk System remains secure, the system will periodically force Users to change their Passwords.

Should the SAHPRA Service Desk System require you to change your Password, capture your new Password to the “**New Password**” and “**Repeat new Password**” text boxes and then click the “**Change**” button.

How do I identify Mandatory fields?

Mandatory fields can be clearly identified by their red narration text.

Given that **fields with red narration text are mandatory**, they must be populated prior to saving / proceeding.

Non-mandatory fields can be identified by the fact that their narration text is grey.

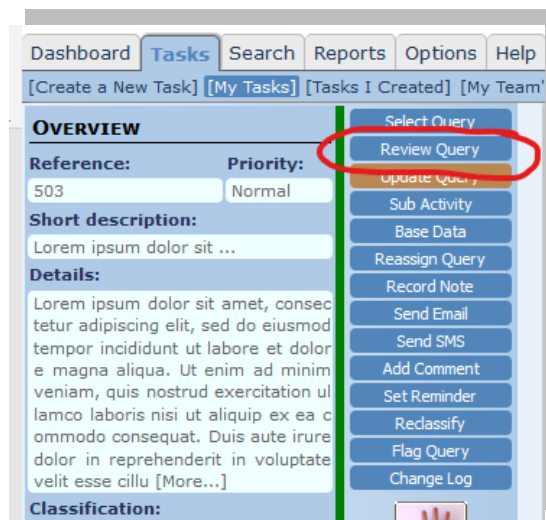
How do I access Attachments that I previously attached to a task?

The SAHPRA Service Desk System allows Users to attach electronic documents (such as PDFs, scans, images, spread sheets and the like) to tasks.

Electronic documents that have previously been attached to a task can be accessed via the “Task Review” screen.

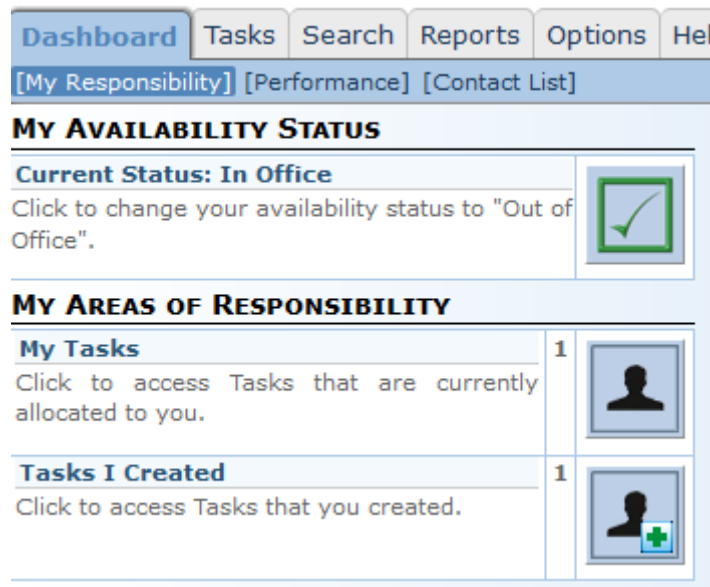
How do I access a task’s Task Review screen?

Search for the task, either via the Quick Search or Smart Search mechanism (details on how to search follow in this document), and then **click the “Review” button which is found on the Task Summary**, which is presented on the left-hand side of the screen. The Task Review will now be presented to you on the right-hand side of the screen.



What is the Dashboard?

The Dashboard details the items that **require your attention** or **of which you need to be aware**.

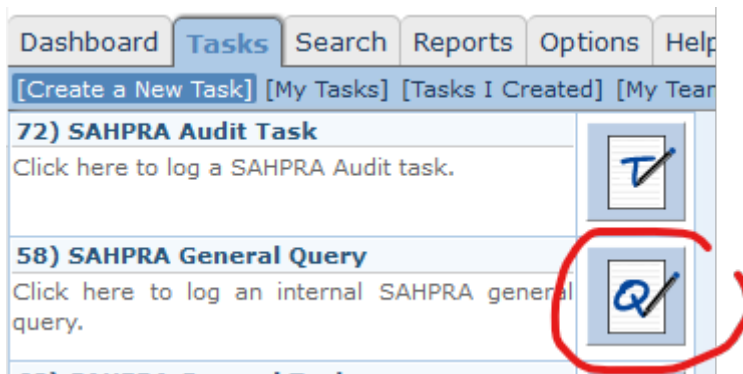


Users are automatically taken to the Dashboard screen **when they sign in**. Further, the Dashboard **can be accessed at any point in time by clicking the "Dashboard" tab**.

The Dashboard's "Quick Link" buttons provide you with a direct link to the screens that you need to utilise to action items that require your attention. The activity counts displayed with the listed areas of responsibility show the number of items that require your attention.

How do I create a new task?

To create a new task, click the **"Tasks"** Tab, click the **"Create a New Task"** option and then **select the task type** that you wish to create.

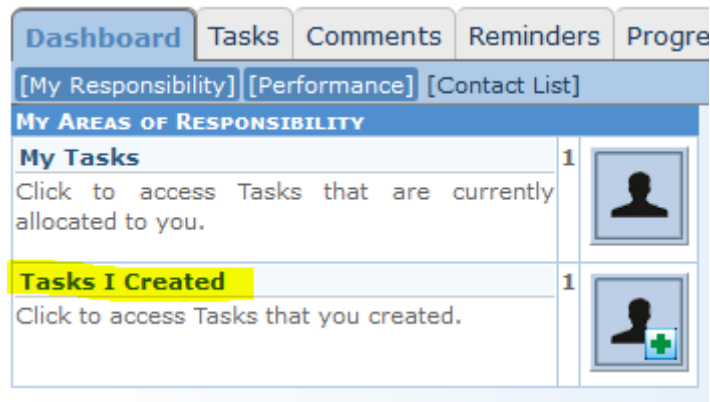


You will now be presented with the “Create a new task” screen on the right-hand side of the page.

Complete the online form and click the appropriate button, as directed by the instructions provided. The screen that follows will indicate the user to whom your task will be routed as well as its classification. Click the “Finish” button to submit your task for processing.

I want to follow up! How can I access tasks that I created that are still open?

To access tasks that you have created that are still open, **click the “Dashboard”** tab and then **click the “Tasks I Created”** option.



You will now be provided with a listing of the tasks that you have created that have not yet been fully processed / closed.

The left-hand side of the screen lists the open tasks that you have created in “Task Summary” format.

The right-hand side of the screen is the area where you will interact with the selected task.

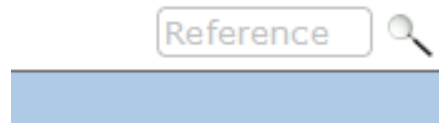
Click the “**Review Task**” button found on the Task Summary to access a transcript for the task under question.

I have the task's Reference number. How do I access the task?

The SAHPRA Service Desk System's "Quick Search" facility is an ideal search mechanism to use should you know the Reference number for the task that you wish to access.

The "Quick Search" facility allows you to perform a simple search for a task on the basis of its Reference number.

The Quick Search facility can be found on the top right-hand corner of the SAHPRA Service Desk System.

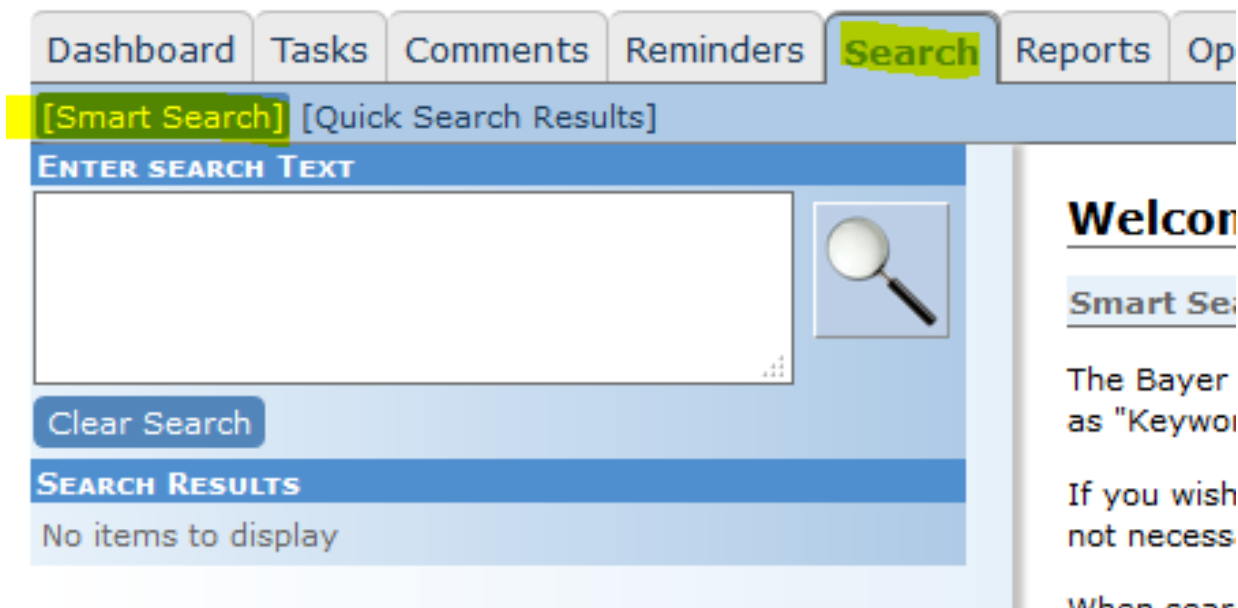


To Quick Search for a task, capture its Reference number to the Quick Search text box and click the search icon (🔍).

I don't have the task's Reference number! How do I find the task now?

The "Smart Search" facility enables you to perform a multiple variable search by using "Keywords" and search strings.

To access the Smart Search facility, **click on the "Search" tab** on the banner menu structure and then **click the "Smart Search" option**.



It is important that **each new line is started with a Keyword**. Typically, **Keywords are to be followed by a space and then a search string that relates to the Keyword**.

For additional detail pertaining to the use of the Smart Search facility, please review the comprehensive notes provided on the “Smart Search” welcome page.

The following Keywords will probably be your most useful:

1. **Open**
Use this keyword if you are looking for tasks that are open.
2. **Closed**
Use this keyword if you are looking for tasks that are closed.
3. **Starter**
Use this keyword if you know the name of the person that created the task.
4. **With**
Use this keyword if you know the name of the person that the task is currently allocated to.
5. **Openfrom**
Use this keyword if you want your search to relate to all tasks opened on or after a particular date.
6. **Opento**
Use this keyword if you want your search to relate to all tasks opened prior to or on a particular date.

Let’s look at some examples.

Please note that the following examples are presented as if “Peter Lever” is the User performing the search.

I am looking for the tasks that I created last week that are still open ...

starter peter lever
open
openfrom 2018/03/12
opento 2018/03/16

I am looking for all of the tasks that I created last week that have been closed ...

starter peter lever
closed
openfrom 2018/03/12
opento 2018/03/16

I am looking for all tasks that were created by John Smith, a colleague of mine I am only interested in open tasks ...

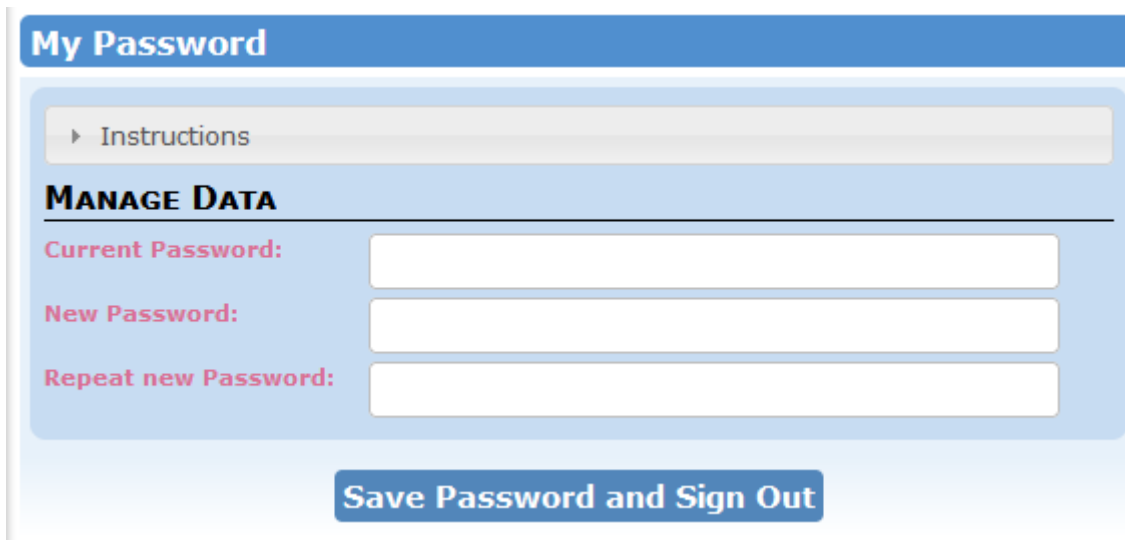
open
starter John Smith

I am looking for all open tasks that are currently allocated to my Supervisor, Jenny Strange ...

open
with Jenny Strange

How do I change my password?

To change your Password, click the “Options” tab, click the “Personal Administration” menu heading and then click the “My Password” menu option. You will now be presented with the “My Password” screen.



The screenshot shows a web interface titled "My Password". At the top, there is a blue header bar with the text "My Password". Below this, there is a light blue box containing a "MANAGE DATA" section. This section has three text input fields labeled "Current Password:", "New Password:", and "Repeat new Password:". Below the input fields is a blue button with the text "Save Password and Sign Out".

To change your password, enter your **current Password** in the “Current Password” text box, enter your **new Password** in the “New Password” and “Repeat new Password” text boxes and click the “Save” button. Once you have changed your Password, you will be required to sign back into the system using your new Password.

Why does the SAHPRA Service Desk system “Time Out”? How do I get back in?

In the interests of system security, if you do not use the SAHPRA Service Desk System for an extended period of time, the system will automatically sign you out.

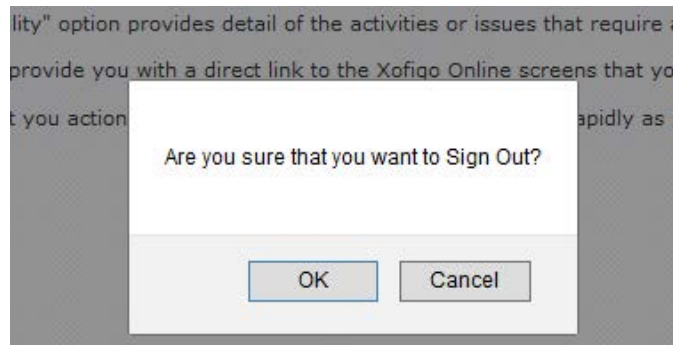
Should this be the case, please click the “Sign In” button on the left-hand side of the “Signed Out” screen and sign back into the SAHPRA Service Desk System.

How do I Sign Out of the SAHPRA Service Desk system?

To Sign Out of the SAHPRA Service Desk System, click the “Sign Out” icon (👤➡️) found on the bottom right-hand corner of the screen.



A pop up will ask you to confirm your intention to sign out. Click the “OK” button to confirm your intention to sign out.



How do I read the Task Summary?

Provided below are some notes that will provide you with some detail regarding the Task Summary that is presented on the left-hand side of the screen.

OVERVIEW	
Reference:	Priority:
503	Normal
Short description:	
Lorem ipsum dolor sit ...	
Details:	
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum [More...]	
Classification:	
Asset Management (1 / CFO)	
Query	
General query	
Query Type:	
SAHPRA General Query	
Process Stage:	
Update query (Self)	
Customer:	
23412312	
Lorem	
Dolor Amet	
Consectetur Adipiscing	
PERFORMANCE	
Opened:	2022/07/18 12:41
Last updated:	2022/07/18 12:41
Goal:	2022/08/01 12:00
Time taken:	0 days 0 hours
Last changed:	2022/07/18 12:54
Current User time:	0 days 0 hours
PEOPLE	
Created by:	
Peter Lever	
Allocated to:	
Peter Lever	

- Select Query
- Review Query
- Update Query
- Sub Activity
- Base Data
- Reassign Query
- Record Note
- Send Email
- Send SMS
- Add Comment
- Set Reminder
- Reclassify
- Flag Query
- Change Log



Reference: Every task is awarded a unique Reference number which can be found on the top left-hand corner of the Task Summary. The reference number can be really handy if you would like to use the “Quick Search” mechanism to access the task later, so its probably a good idea to keep a note of it.

Hand symbol: An open hand (as per the example provided) indicates that the task is currently open. A “Thumbs up” indicates that the task has been closed. Tasks with open hand symbols that have a little green triangle on them haven’t been fully classified / allocated and require your attention!

Task Type: The Task Type (in the case of this example “SAHPRA General Query”) allows you to identify the type of task that you are dealing with.

Process Stage: The Process Stage (in the case of this example “Update query (Self)”) allows you to identify at what stage the task is.

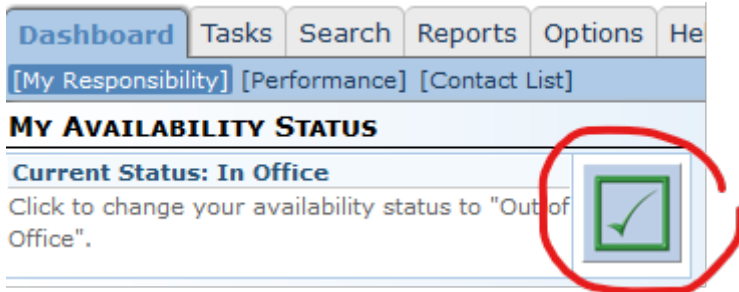
Customer: The “Customer Details” field provides detail pertaining to the Customer to which the task relates.

Created by / Allocated to: These fields tell you who created the task (in this example, “Peter Lever”) and the user to whom the task is currently allocated (in this example, “Peter Lever”).

Status colour: The status colour bar, in the case of this example ... the green bar, shows the current time-based status of the task. Tasks start off as *Green*, then turn *Yellow* followed by *Orange* and finally *Red*. Red tasks have exceeded their Service Level Objective.

How do I manage my availability on the SAHPRA Service Desk?

If you are going to be out of the office for an *extended* period of time and will therefore be unavailable to progress tasks, please use the “My Availability Status” functionality provided on the “Dashboard” tab to change your status to “Out of Office”.



Please don't forget to mark yourself as being “In Office” when you get back!

I think that there are FAQs that need to be added to this document! What do I do?

If you believe that an FAQ needs to be added to this document, please contact Peter Lever or Dube Mzimba. Contact details are provided below.

Peter Lever

Mobile / WhatsApp: +27 83 447 4883

Email address: peter@therefore.co.za

Dube Mzimba

Mobile / WhatsApp: +27 82 772 6235

Email address: dube.mzimba@sahpra.org.za