



Raise a System Support Request Guide V1.1

Document	Raise a System Support Request Guide
Purpose	The purpose of this guide is to support system users in raising a request (Support or Issue)
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Owner	ICT & Business Transformation Team / System Support Team
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How to “Raise a Support/Issue Request”

Raising a Request

1. To raise a request or submit an issue, please log onto [Tri-X](#).
2. Click **Local Resources > Adults System Support | Support/Issues Requests**, then click the relevant link.
3. Just follow the onscreen instructions and click submit when ready.

Note: there is a separate link for external users (Mental Health Teams) and Internal Users.

4. All users can raise a request through TRI-X however Internal Users will also have the ability to raise **System Support/Issue Requests** via the [intranet](#).

5. Once you’ve clicked on the appropriate link, then enter your details. This will include **Forename, Surname, Work Email, Contact Number, Team and Team Manager**. Note: External users will have input these details in each time due to not having Wakefield Council’s intranet access. Internal users should find their details pre populate.

Adults Support Request

Your Details

Support Request

6. You then need to choose which system the support/issue relates to.



Adults Support Request

Your Details

Support Request

Summary

System *

Caredirector

Pathways to Care

CM

Caredirector Requests

1. Select **Caredirector** and choose the section it relates to.

System * **Caredirector** Hospital 2 Home

Support Request * Unable to Access System Deletion Request Lock Down Request Merge Request

Re-Open Request New User Request Change Request Finance Support

View Request Other Request

a) Password reset/ Access Issues – Use this if you are having any issue access the system.

b) Deletion Request – This is when the user can ask for a number of different elements to be deleted. This includes forms, attachments, activities, cases, service provisions etc.

c) Lockdown Requests – This is when a user (usually a manager, safeguarding etc) requests that a person record or a particular case is restricted for a system user. In Caredirector this is known as “Data Restrictions”.

d) Merge Request – This is when there are maybe 2 or more records for the same person. The user may request to merge all these together.

e) Re-Open Request – This is when a user may request to re-open either a case, from, activity or safeguarding record.

f) New User Request – This is when we get a new starter needs to be added into the system. It will include details of their team and manager and will also specify their requirements for training.

g) Change Request – This is when users, superusers or managers want to request a change to the system that may need further development.

h) Finance Support – This is when a user can request either training support specific to finance areas like Service Provisions, Unit Rates etc or raise a system issues relating to finance areas that need investigation. Areas to choose from are Service Provisions, Service Deliveries/Variations, Finance Transactions, Financial Assessments, Finance Invoices, Personal Budgets, Invoice Batches, Rate Units and Cost per week.

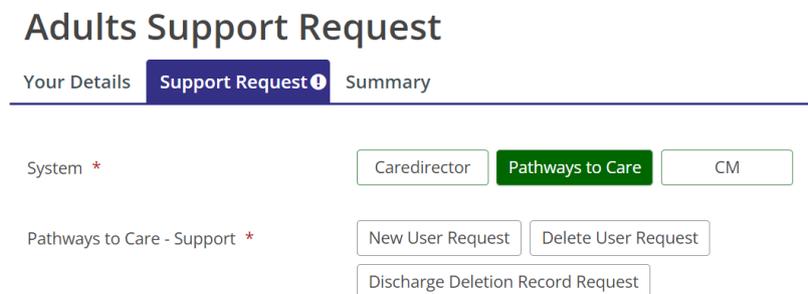
i) View Requests – This is when users can request support/issues for either dashboard views, homescreen views or advanced search views.

j) Other Request – This is when users have a request that falls outside the above options. These requests will need further investigation and allows the user to describe the request in more detail.

2. Once submitted, the request will go through to the System Support Team, and they will contact back once complete or if they require further information.

Pathways To Care (P2C) Requests

1. Select **P2C** and choose the section it relates to.



a) New User Request – This is when we get a new starter needs to be added into the system. It will include details of their team and manager and will also specify their requirements for training.

b) Delete User Request – This is when a manager can request for a user to be removed from P2C access. This could be because they have change roles or moved departments and therefore don't require access anymore.

c) Discharge Deletion Record Request – This is when a user can request the deletion of a discharge record. This can be because it's duplicated by mistake or entered in error.

b) Change Request – This is when a manager or superuser can request a change to the system or set up. This will need to be allocated to a Development Officer and will required further investigation, meetings and discussion.

2. Once submitted, the request will go through to the System Support Team, and they will contact back once complete or if they require further information.

CM Requests

1. Select **CM** and choose the section it relates to.

Adults Support Request

Your Details **Support Request** Summary

System * ✓

CM - Support *

a) Password reset/ Access Issues – Use this if you are having any issue access the system.

b) New Starter Training Request – This is when we get a new starter who needs to be added onto the system and trained.

c) Existing User Training – This is when a system user has been trained but requires more training. Requests can be made this option.

d) Deletion Request – This is when one of the following needs to be deleted (Carer/ Service User/Rota. These request can only come from a Manager.

e) Look Up Request – This is when a look up either needs adding, updated or deleted.

f) Permission Change Request – This is a system user permissions need changing.

g) Leavers Request – This is when a system user (staff or carer) leaves. Please let us know so we can make arrangements to disable access when they leave.

h) Report a Technical Issue – This is when a user has an error message, or a system technical issue occurs. Please give as much detail as possible.

i) Other Request – This is when users have a request that falls outside the above options. These requests will need further investigation and allows the user to describe the request in more detail.

2. Once submitted, the request will go through to the System Support Team, and they will contact back once complete or if they require further information.

Version Control

Version Number	Change	Author	By Date
V1.0	INITIAL START	Pete King	05/12/2022
V1.1	Added in CM requests and overview for each section	Pete King	20/11/2023