



## Introduction to Ivanti Service Manager (ISM) Self-Service

The Judicial Branch is implementing a new self-service ticketing system, called Ivanti Service Manager to replace the current HEAT ticketing system. Ivanti will allow the Call Center and Help Desk offices to run more efficiently and increase productivity throughout the court system.

All users will now have the ability to submit incidents directly; however, please continue following your county's established procedures to determine who should submit incidents on behalf of your court.

### Objectives:

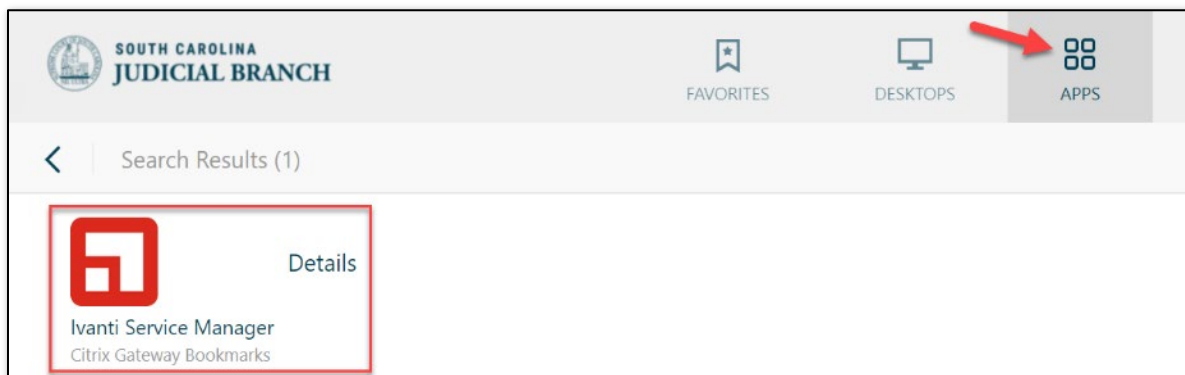
In this guide, you will be walked through the process of:

- Launching/Opening Ivanti Service Manager
- Reporting an Ivanti Service Manager incident or problem
- Accessing the Knowledge Base
- Viewing "My Items"
- Alerts and Announcements
- Logging out of Ivanti Service Manager

### Launching Ivanti Service Manager

You will access the Ivanti application by logging into Citrix.

After logging into Citrix.



*Figure 1 – Citrix Gateway Apps Page*

- Select the Apps button in the top righthand corner.
- Then select the Ivanti Self Service icon.

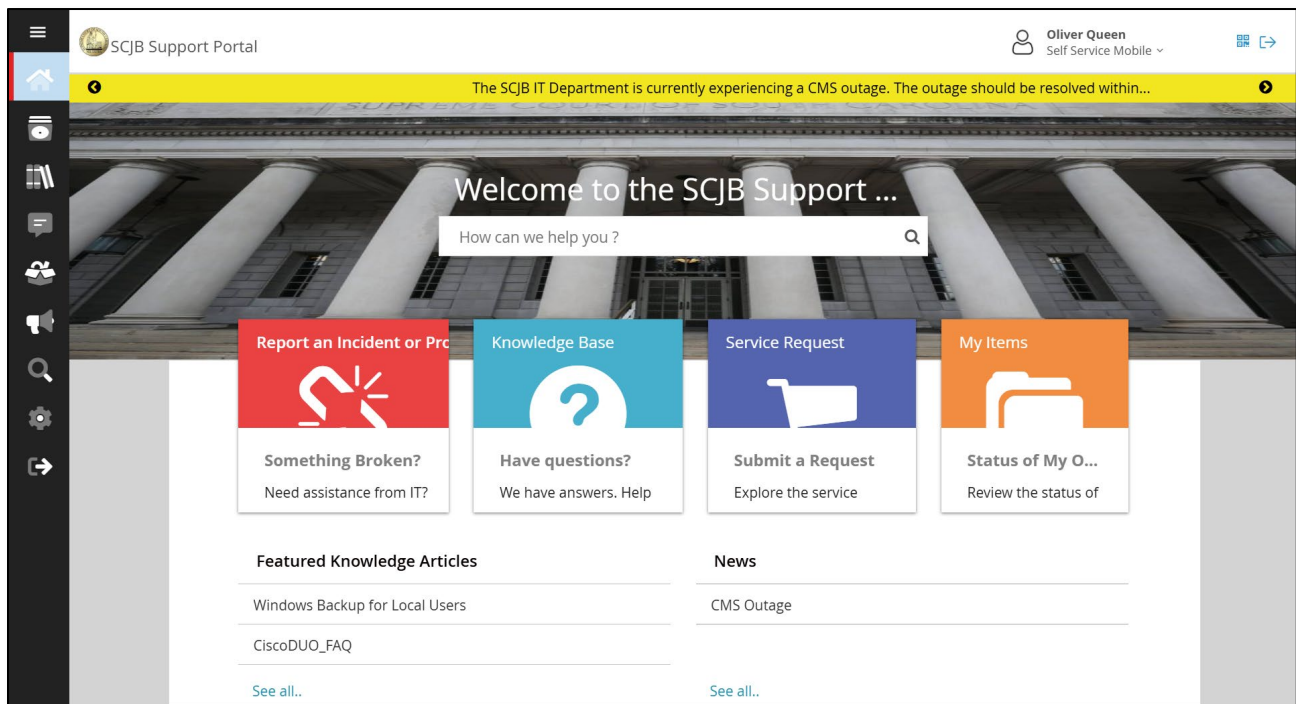


The Ivanti application will open in a new browser tab.



*Figure 2 – Browser Tabs*

You will see the **SCJB Support Portal** screen. From this screen, you can Report an Incident or Problem, view the Knowledge Base, or view the status of an incident(s) through My Items.



*Figure 3 – “SCJB Support Portal” screen*

To report an Incident, single-click the **Report an Incident or Problem** tile on the home screen.

## Report an Incident

The **New Incident** screen will open.



*Figure 4 – Blank "New Incident" page*

You will need to enter in the following information that applies to your incident on the **New Incident** page

1. **Service** – The service will default to Applications and cannot be changed.
2. **Category** – Using the dropdown, select the appropriate category. This should reflect the application you need assistance with. This is a required field.
3. **Subcategory** - Select the appropriate Subcategory that coincides with the service you selected. Review the appendix at the end of this document to determine which Subcategory you should choose, based on your issue. This is a required field.
4. **Summary** – The summary will auto populate base on the Subcategory you choose.
5. **Description** – Short detailed description of the issue. This is a required field.
6. **Court Type** – Select the appropriate Court Type. This is a required field.
7. **Court Sub Type** – Select the appropriate Court Sub Type. This is a required field.
8. **Customer Type** – Select the appropriate Customer Type. This is a required field.
9. **Attach** - An attachment or multiple attachments such as a PDF, Word doc., spreadsheet or photo can be attached to the incident. Just click on **Attach** (in blue) and this will allow you to choose from what you have saved on your hard drive or network drive.

There may be additional information needed based on the **Subcategory** you choose.



If additional information is needed, a form will display at the bottom of the page under **Incident Details**.

*Figure 5 - "Incident Details" Form*

1. You will need to enter the information requested as it applies to your incident on the **Incident Details** form. You must complete all required fields before you can submit your ticket.

*Figure 6 - "Completed Incident page"*



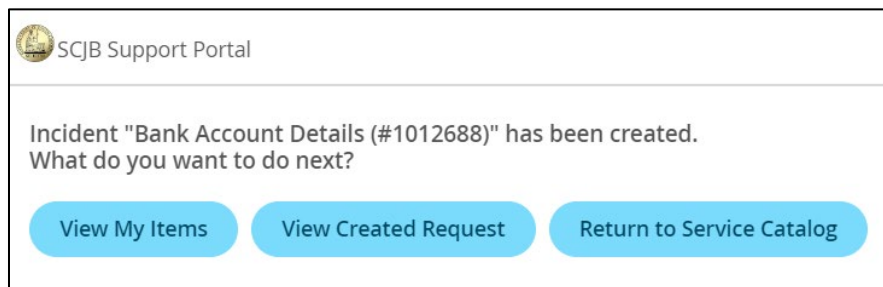
Once all required fields are entered, click the **Save Incident** button located at the top of the page or just above the **Incident Details** tab.



*Figure 7 - "Save Incident"*

**Note - If you close the screen before clicking the Save Incident button, you will lose all information entered on the form.**

After you successfully save your incident a message will appear.



*Figure 8 – Message that your incident has been created.*

You will also receive an email from [IvantiCC@sccourts.org](mailto:IvantiCC@sccourts.org) letting you know your incident has been logged.

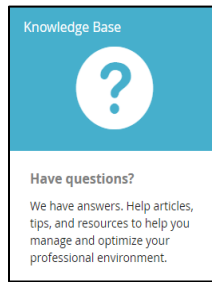


*Figure 9 - Email Notification of incident being logged*



## Knowledge Base

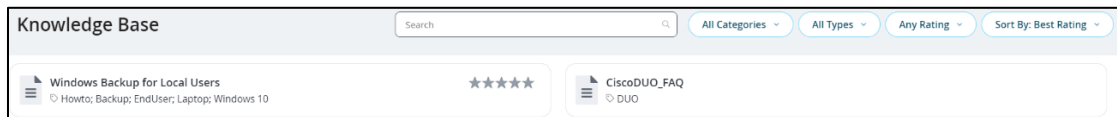
Single-click the **Knowledge Base** option on the home screen. This will give you access to view the **Knowledge Base**.



*Figure 10 – Knowledge Base Tile*

Examples of **Knowledge Base** would include:

- View shared IT knowledge and information
- Provides automated knowledge matching
- Assist in resolving known IT issues yourself
- IT tips and tricks

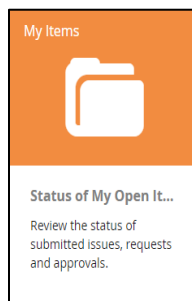


*Figure 11 – Knowledge Base View*

Knowledge Base data will be added as determined by Applications Support and upper management.

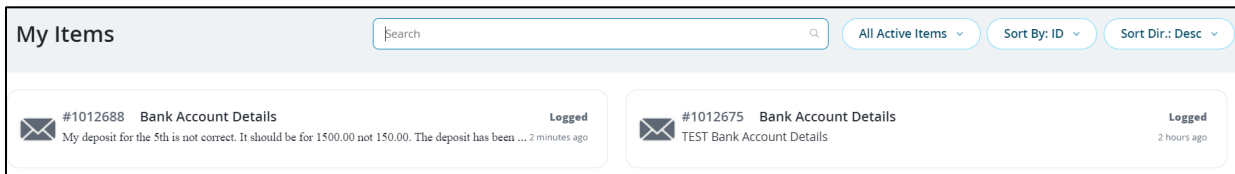
## Viewing My Items

**My Items** gives you access to view the status of your open Incidents.



*Figure 12 – My Items Tile*

Click the **My Items** option on the home screen.



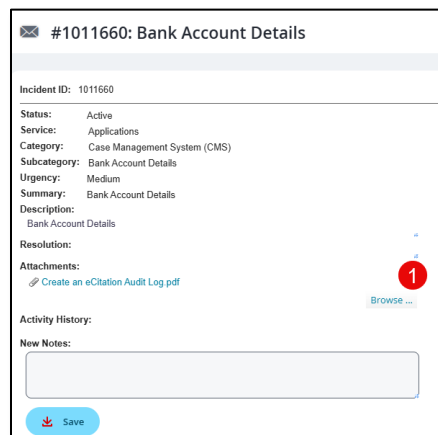
*Figure 13 – My Items List*

Once you click the item listed, you will be able to see the details of your request as well as the status.

You may see your incidents in the following statuses:

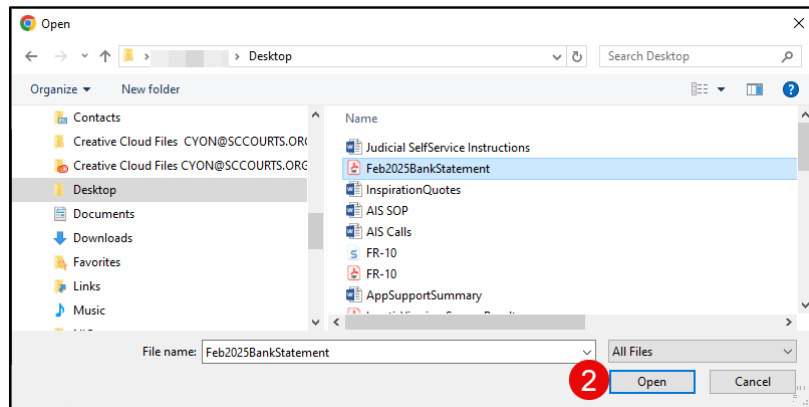
2. **Logged** – Incident has been entered, but not yet accepted by a Call Center Specialist.
3. **Active** – Your incident is being actively worked by a Call Center Specialist.
4. **Waiting on Customer** – The Call Center Specialist has requested something (information, documents, etc.) from you.
5. **Resolved** – Your issue has been resolved and the incident is closed.

You may also update or add to your incident from the **My Items** Option. You can add new notes, modify the incident details, or upload documents. Below we will walk through uploading a bank account statement to an incident. Click the item to open the incident.



*Figure 14 – Open Incident*

1. Select Browse



*Figure 15 – Google Explorer window*

2. Select the file to upload and click **Open**.

*Figure 16 – Open Incident with uploaded file*

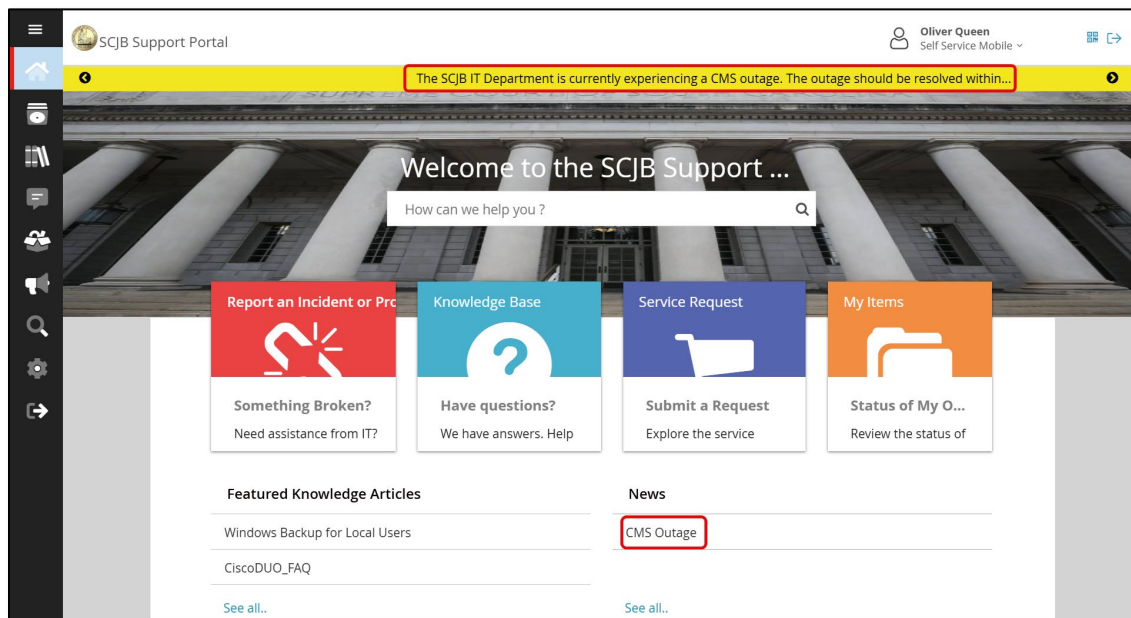
3. Your uploaded file will show under the attachment's section. Select **Save**.





## Alerts and Announcements

Alerts and Announcements are located at the top of the Home screen. In the example below an Outlook Outage alert has been posted. Details of the outage can be viewed by clicking **Outlook Outage** below the **News** section at the bottom right.



*Figure 17 - Home screen with CMS Outage Alert*

## Logging out of Ivanti Service Manager (ISM)



*Figure 18 – Browser Tabs*

To log out, close the **Home / SCJB Support Portal** browser tab.



## Appendix

### When to Use Which Category and Subcategory

Category	Subcategory	Use this Subcategory when you have issues with...
Case Management System (CMS)	Bank Account Details	Adding deposits, issuing checks, voiding checks
		A new checking account.
		Voiding a check or deposit.
		Adjusting bank account transition dates, account, etc.
		Recording or updating Credit Card Transactions.
	Bank Account Reconciliation	Balancing the bank account.
		Transactions on your bank statement.
		Clearing transactions in Bank Account Details
	Bond Court	Setting or posting a bond.
		Creating a Bond Refund.
		Merging Bond records.
		Transferring cases to the trial court.
	Case Financials	Fines/Costs on a case.
		Payments on a case.
		Disbursements on a case.
		Creating/deleting/modifying a refund on a case.
		Voiding disbursements on a case.
		Adjusting the Balance Due on a case.
		Misc. Payments on a case.
		Expungements/Set Check Number on a case.
		The amount paid on a case.
		The charge Amount on a case.
	CaseHelp_NonFinancial	A non-financial problem not covered by a subcategory
		Disposing a case.
		Printing NRVCS.
		Expunging a case.
		Adding/Deleting/Modifying case parties.
	CDR_Charge Code	Adding a CDR or Ordinance code.
		Amending a charge.
		Rebuilding Obligations.
	Check Verification_Print	Printing checks.
		Reprinting a check.



	CMS Citrix	Logging into CMS.
		Slow response when loading CMS.
		Workspace/Receiver errors.
		Citrix not responding.
	CMS Enhancement Request	Requesting a new function in CMS.
	CMS Other	Things not covered in another Subcategory.
	CMS Portal	Logging in.
		Slow response.
		Portal not responding.
	CMS Training Request	Training request.
	CMS UserAcct	Adding a new user.
		Deactivating a user.
		User rights.
	Daily Deposit Report	Running the report.
		Voids.
		Receipt Numbers.
	Disbursement Report	Running the report.
		Month End balancing.
		Adjustments.
	Docket Request or Issue	Adding a new Docket
		Changing a docket.
		Missing Cases on a docket.
	eCitation Question_Help	Errors on the report.
		How to
		Removing cases from Portal
	eDisposition Question_Help	How to
		Errors
	Fine_Costs	Correcting fines and costs.
		Updating fines and costs.
		Rebuilding fines and costs.
	Document_Form_Report Help	How to
		Errors
		Adding the document to a Court Process
		Editing the document.
		Creating the document.
	Imaging Help	How to image.
		Errors scanning.
		Images displaying on the Publix Index.



	Judges	Adding, modifying or deactivating new judges, Rights Court Association
	Month End Financials	Balancing for the month.
	Officers	Adding officers.
		Modifying officers.
		Deactivating officers.
	Printer_Scanner	How to Errors
	Revenue Report	Month End
		Cost Codes
	Rosters	How to
		Creation
		Publishing
		E-mail Notifications
	SlowResponse Time	Slow Response Time
	UserAcct_Pswd Help	New User
		Resetting password.
		Unlocking accounts.
		Error
		Deactivating accounts.
CMS eDisposition Reporting Portal	eDisposition Error	eDisposition Error
CMS Portal Page	Access Links	How to
		Citrix Workspace_Receiver
County Stats	Bench Mark	SCJB use only.
	ConfirmRpt_TransmissionFile Correction	Not reporting.
		Adding a Contact Person
		Making corrections.
		CMS vs SCCA difference
	County Stats Other	Removing an Indictment Number
		Issue not covered by a subcategory
	County Stats Portal Access	Creating a new user.
		Deactivating a user
	Delete	Deleting Warrant_Case
	Duplicate Warrant_Ticket	Removing an Indictment Number
		Correcting Warrant_case number
	Judge Code	Adding a new Judge
	Monthly_Reports	Number of Cases
	Report Request	FOIA



	Self Audit	Number of Cases
		Errors
		How to
E-Filing - CP Clerk Review	Clerk Legal Question	Legal Question
	Clerk Login	Password Issues
		Locked Account
		Errors
	Clerk Notification_NEF Question	Not receiving.
		E-Mail Addresses.
	Clerk Payment Processing	Payments
		Partial Acceptance
		Missing Receipt Number
		Errors
		More than one action
	Clerk Rejected Filing	Rejected Filings
	EFile Clerk Baseline Update (SCJB Internal Use Only)	SCJB USE ONLY
	EFile Clerk COR (SCJB Internal Use Only)	SCJB USE ONLY
	EFile Clerk Enhancement Request	Enhancement requests
	EFile Clerk Error	Errors
	EFile Clerk How To	How to
	EFile Clerk Other	Issue not covered by a subcategory
	EFile Clerk Training Request	Training Request
	EFile Clerk UserAcct	Adding a new User
		Deactivating User
		Unlocking an account.
		Password Issues
		Errors
	EFile Clerk Vendor Update (SCJB Internal Use Only)	SCJB USE ONLY
	EFlex Clerk Bug/PBI (SCJB Internal Use Only)	SCJB USE ONLY
	On Hold Filings	On Hold Filings
E-Filing - FC Clerk Review	Additional options in E-Filing - Clerk Review to cover FCCM	
Electronic Day Book	Electronic Day Book	Accessing the Daybook
Ivanti	Ivanti How To	How To
	Ivanti Site Access	Site Access
	Ivanti User or Password	User or Password



JMSWeb (Jury Management System Web System)	JMSWeb Bank Acct Related	Voids
		Reissuing Checks
		Balancing
		Clearing Items
	JMSWeb Baseline Update (SCJB Internal Use Only)	SCJB USE ONLY
	JMSWeb Bug_PBI (SCJB Internal Use Only)	SCJB USE ONLY
	JMSWeb Check Printing_Payment	Errors
		Juror Present Report
		E-Pay
		Reissuing Checks
		Voids
	JMSWeb Enhancement (SCJB Internal Use Only)	SCJB USE ONLY
	JMSWeb Forms_Report	Creating
		How to
		Printing
		Editing
	JMSWeb Grand Jury	How to
	JMSWeb How To	How to
	JMSWeb Other	Issues not covered by a subcategory
	JMSWeb Printing Issues	Errors
		Edits
	JMSWeb State Grand Jury	How to
	JMSWeb UserAcct	Adding Users.
		Deactivating Users
		Logging in.
Municipal e-Disposition Portal	Municipal eDisposition Submission Error	Errors
	Municipal eDisposition UserAcct	Adding Users.
		Resetting Passwords.
		Unlocking accounts.
		Errors
Other	Other	Deactivating Users.
		Anything not defined in another cat
Public Index	Public Index	There are cases missing from the INDEX.
		Errors
SCJB Online Learning Center	Learning Center How to	How to do something on the LMS.
	Learning Center Site Access	Accessing the LMS.
	Missing Course	Finding the course you are looking for.



South Carolina  
Judicial Branch

*Ivanti Service Manager Self-Service  
Judicial AD User Reference Guide*

sccourts.org Site	Registration	Registering for a course.
	Username or Password	Your Username or Password.
	Error	Receiving an error.
	Failure	Login attempts have failed.
Sentencing Sheet Application	Outage	To report an outage.
	Attorney Issue	All attorney issues with the Sentencing Sheet Application.
	Court Issue	All judge or clerk issues with the Sentencing Sheet Application.