EDQM HelpDesk User Manual

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The EDQM FAQs: a self-service source of information

In order to provide the best customer support, the EDQM has identified and gathered answers to the most common and recurring questions and issues. You can find these answers in the Frequently Asked Questions (FAQs) articles covering all the EDQM's activities.

Before raising an issue via the HelpDesk, you are strongly encouraged to use the EDQM FAQ articles as a primary way to get help and find the answer to your question. If the FAQs do not supply you with the solution, you should turn to the EDQM HelpDesk for support.

The EDQM HelpDesk: a centralised support service at your disposal

The HelpDesk is a support service provided by the EDQM to respond to user and customer questions on a variety of topics. This intuitive and user-friendly tool provides a central point of contact and as a result, facilitates communication with the EDQM. It allows the EDQM to improve its efficiency and response rate and ensure that consistent replies are provided to questions.

The HelpDesk also allows the EDQM to monitor feedback and continuously review and improve its services, for example it helps the EDQM to regularly update the list of Frequently Asked Questions (FAQs) published on its website.

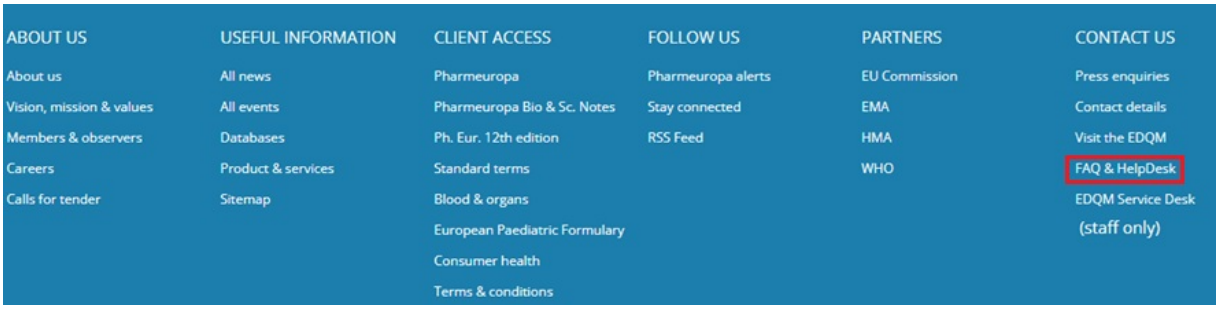
How to access the FAQs and the EDQM HelpDesk?

In order to access the list of FAQs and the EDQM HelpDesk, you can:

- click on the **FAQ & HelpDesk** link in the **CONTACT US** block on the EDQM home page:

- use the link to the specific FAQs and the HelpDesk available via each menu item and/or sub-item in the main menu (EDQM, Medicines, Substances of human origin, Consumer Health, Products & services, Events and training):

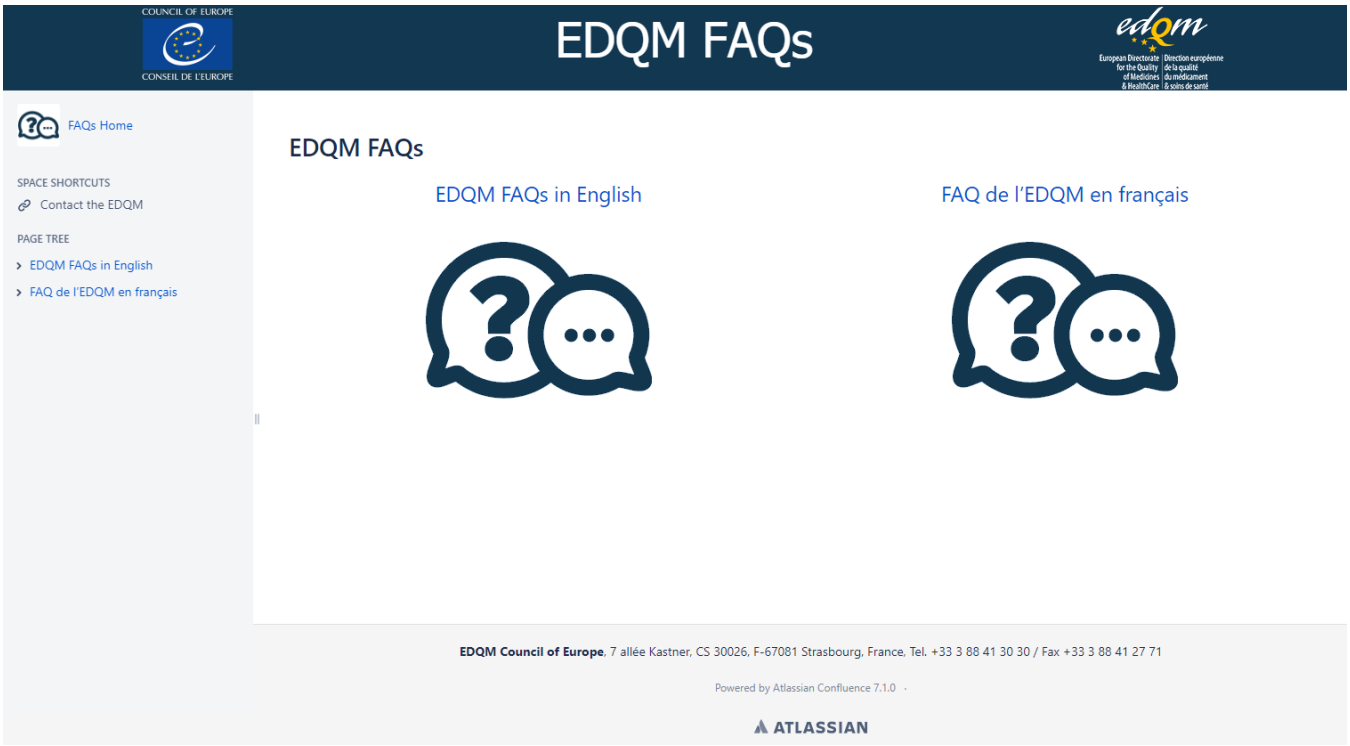
- go to the link **FAQ & HelpDesk** in the **Contact Us** section of the footer navigation menu on the home page:



- or access them directly here:
  - FAQs: **faq.edqm.eu**
  - HelpDesk: **helpdesk.edqm.eu/servicedesk**

Search the FAQs

On the **EDQM FAQs** home page you will find the links to the EDQM FAQs in English and French, easily perceivable in the right pane and also available in the left one:



After choosing your language of preference, the FAQs page appears, providing the **How to navigate through FAQs** instruction at the top and offering two ways to access the list of topics: from the lower part of the right pane and from the left pane.

In order to find the answer to your question, you can:

- click on the title of one of the listed topics to expand it and see the enclosed questions and subtopics
- select a question and read the answer to it

or:

- use the **Search...** field by typing in your question or the keyword(s)
- the system will show you the corresponding question(s) if there is a match

If the list of questions and answers on the **EDQM FAQs** page does not provide you with the reply to your specific query, you have the option to contact the EDQM via the HelpDesk directly from here:

- by clicking on the **Contact the EDQM** link, available in the **Space shortcuts** section at the top of the left pane on every FAQs page
- by following the **EDQM HelpDesk** link in the **How to contact the EDQM via the HelpDesk** instruction
- by using the link to the HelpDesk provided in the answer to the last question listed under each topic (or subtopic, if it occurs) in the FAQs

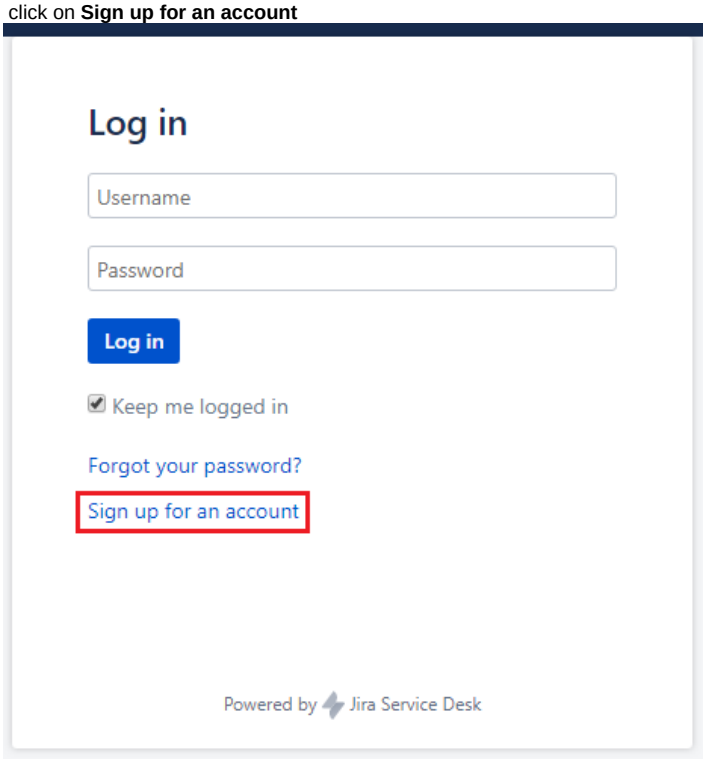
Login to the HelpDesk portal

Upon following the HelpDesk link, you will be asked to identify yourself.

Create your HelpDesk account

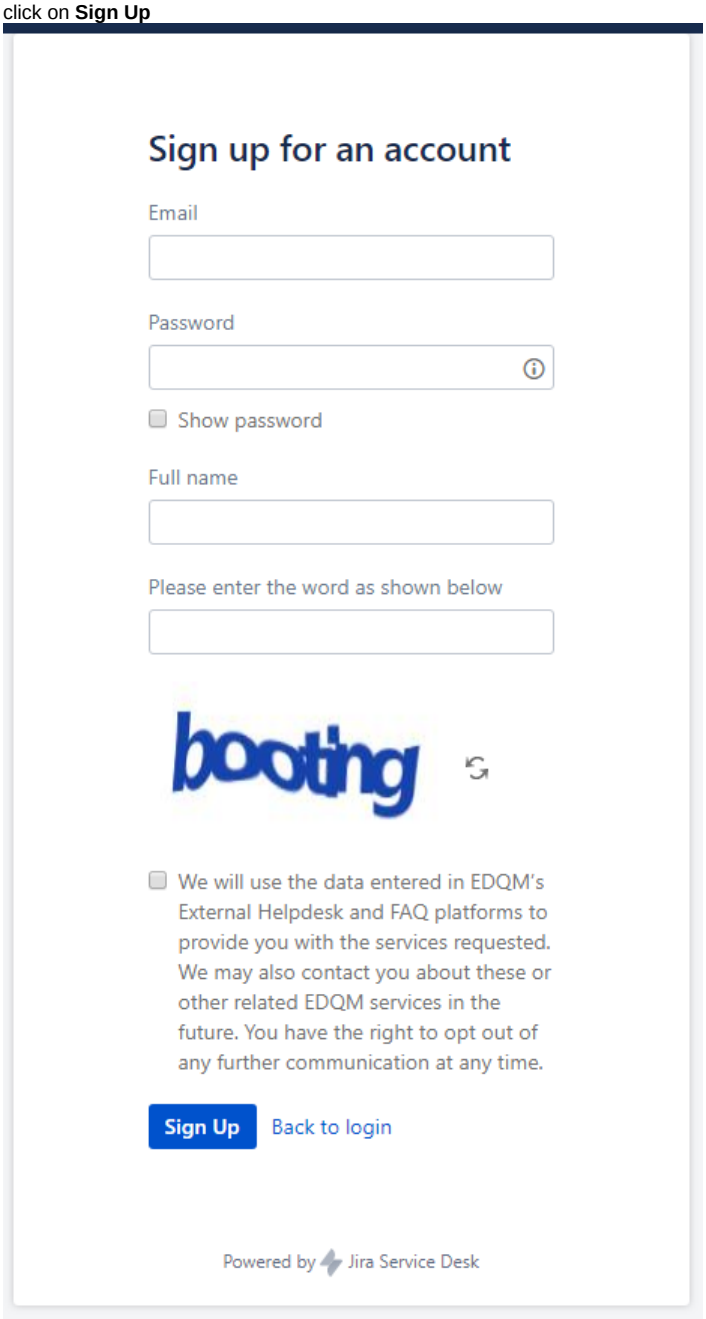
If this is the first time you use this service, you must create a HelpDesk account.

- click on **Sign up for an account**



- enter your **E-mail** address
- enter your **Password**
- enter your **Full name**
- enter the captcha (distorted word) in the field **Please enter the word as shown below**
- accept the terms of use by ticking the box next to the text of the privacy policy

- click on **Sign Up**



Once you have created your account, you will receive a confirmation e-mail.

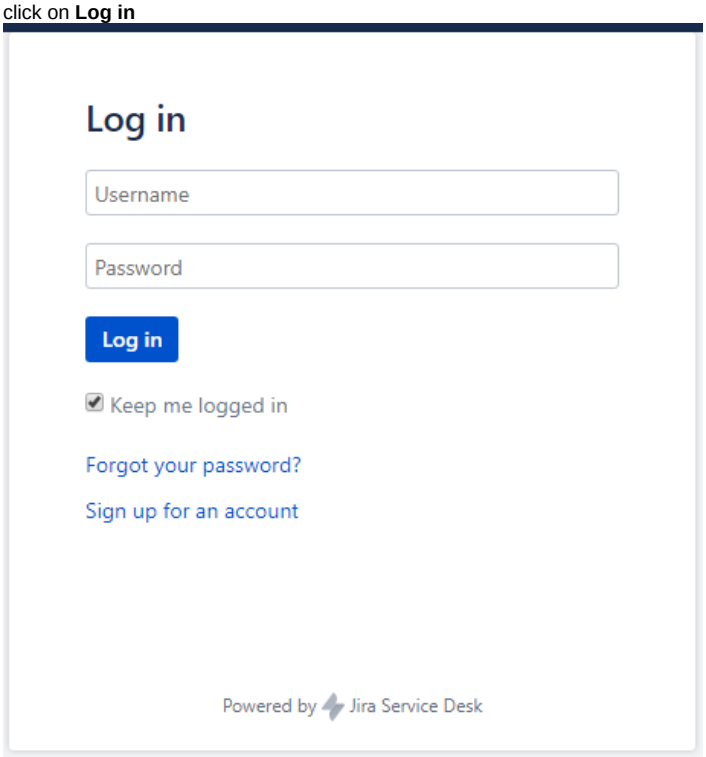
Tips

- All fields are obligatory.
- Double-check the e-mail address you have entered to avoid any typographical errors that will lead to lost messages.
- Click on the icon to display the password policy.
- Tick the **Show password** checkbox to display your password.

If you have already signed up for an account:

- enter your credentials - your e-mail address that serves as your **Username** and your **Password**

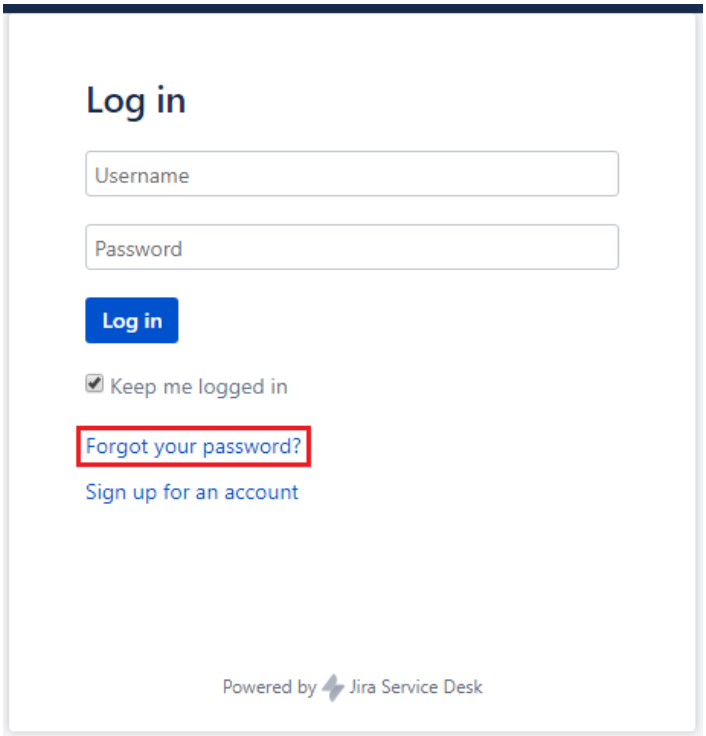
- click on **Log in**



Forgotten password

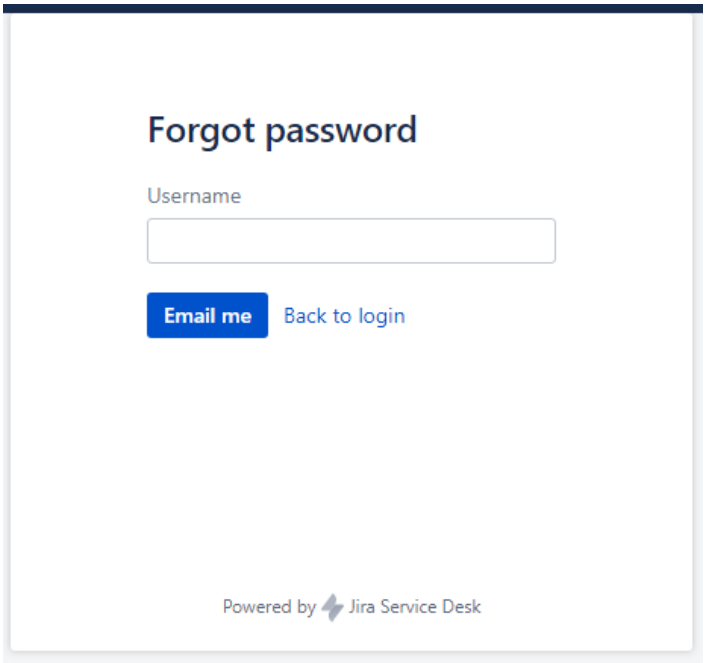
If you have forgotten your password or you are not sure whether you have created an account in the past:

- click on **Forgot your password?**

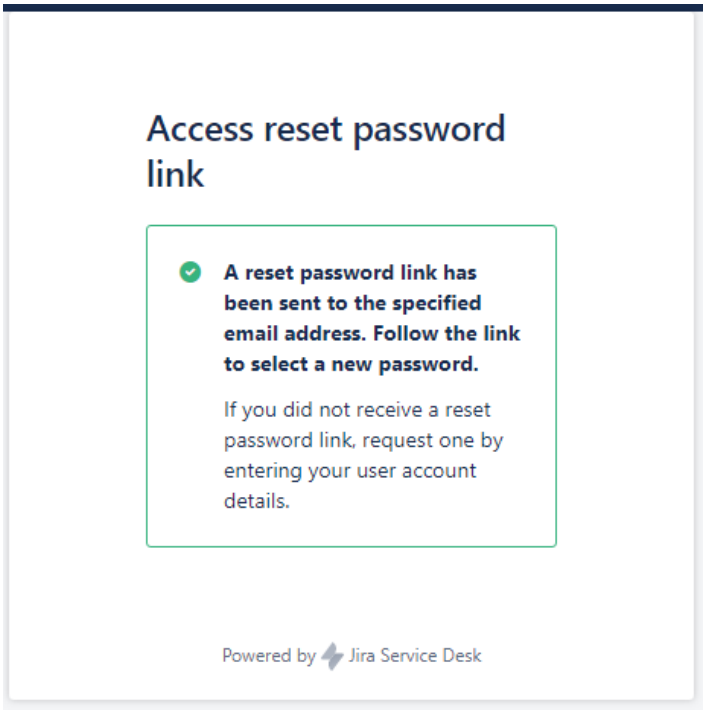


- enter your e-mail address in the **Username** field

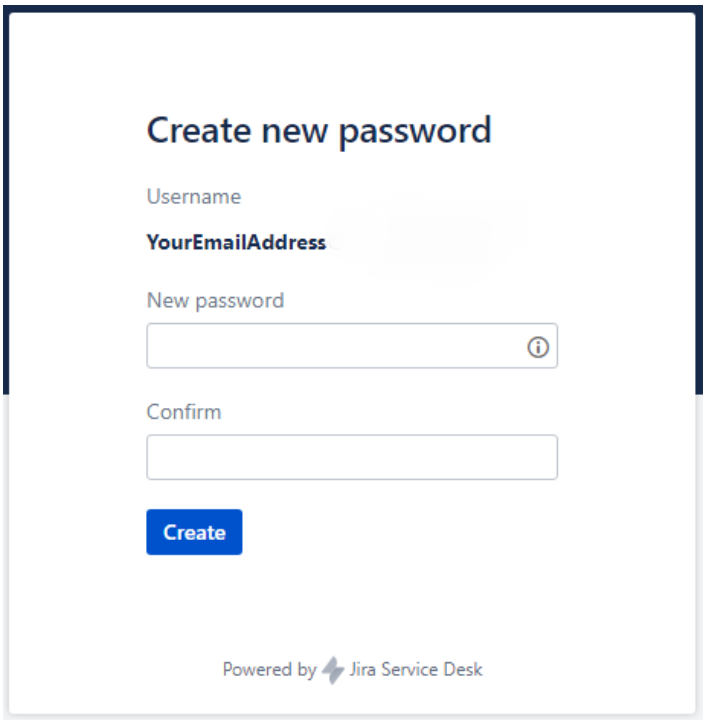
- click on **Email me**



- the following message is displayed:



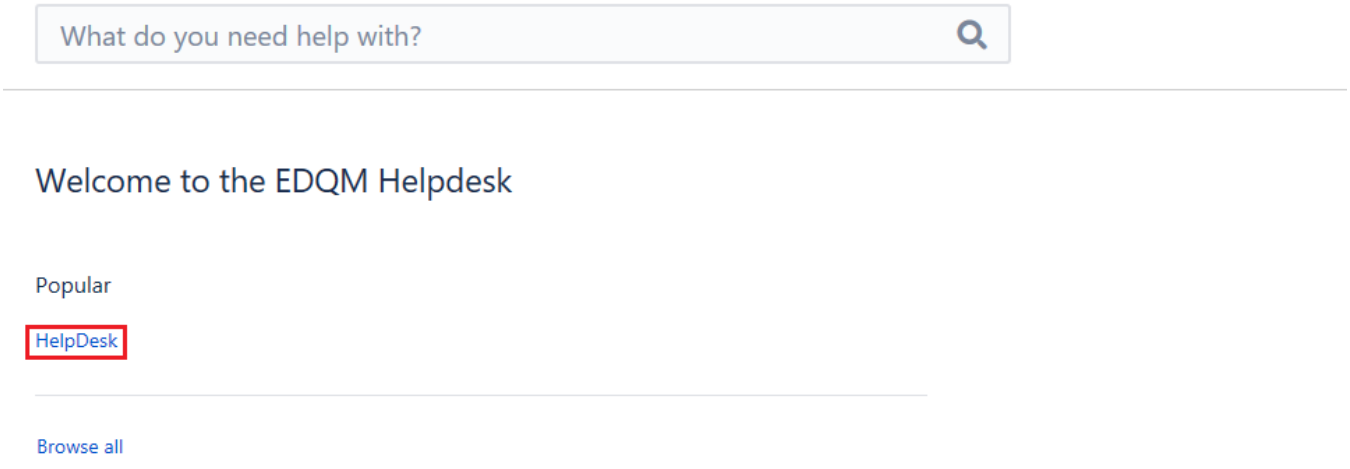
- follow the **Reset my password** link provided in the e-mail you have received
- in the **Create new password** window, enter and then confirm your **New password**
- click on **Create**



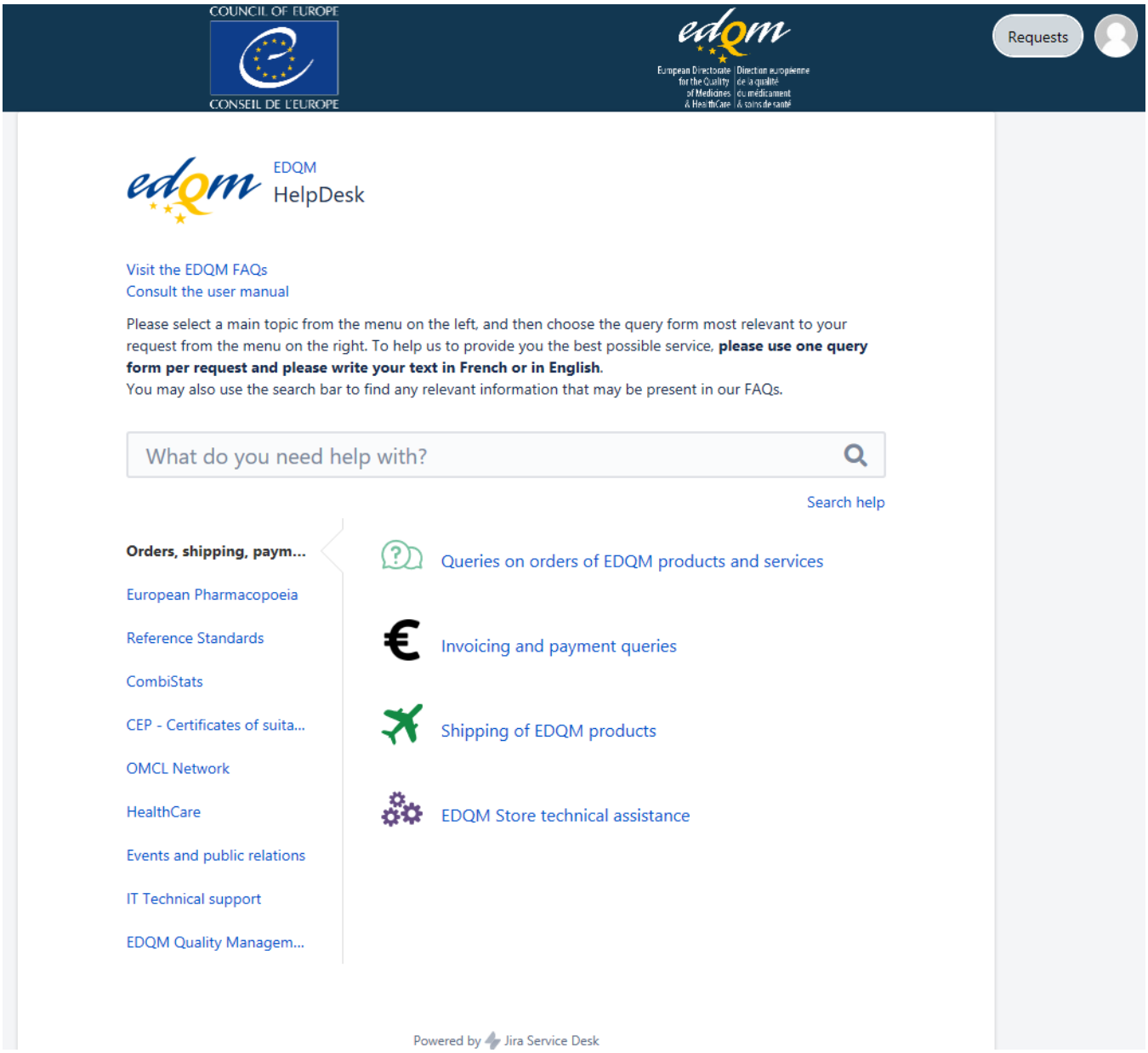
How to create a request?

Upon logging in to the EDQM HelpDesk for the first time (see chapter Login to the HelpDesk portal), the EDQM HelpDesk welcome page will appear.

Click on the **HelpDesk** link on the welcome page to open it.



The HelpDesk portal appears.



In all subsequent utilisations of the EDQM HelpDesk service, you will directly land on the HelpDesk portal homepage after logging in.

On the HelpDesk portal homepage, the following topics, i.e. types of requests are listed in the left pane:

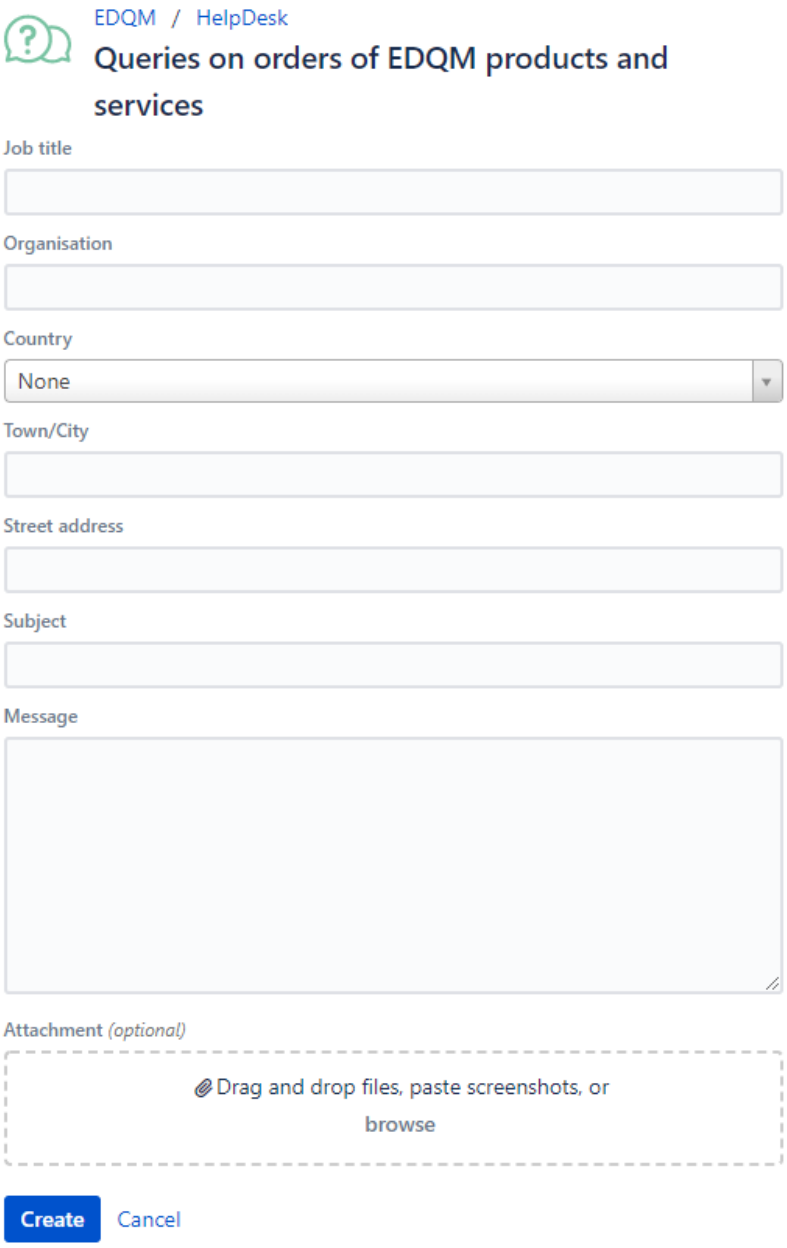
- Orders, shipping, payments
- European Pharmacopoeia
- Reference Standards
- CombiStats
- CEP - Certificates of suitability
- OMCL Network
- HealthCare
- Events and public relations
- IT Technical support
- EDQM Quality Management

Click on a title of a topic to display its subtopics in the right pane.

Before you create a request, you must first select the topic and then the subtopic that closely relates to your question. The topic you select also directs your request to the team in charge. Therefore, if the topic is incorrectly selected, it might take more time to process your request and/or you will be asked to provide additional information at a later stage.

To create a request:

- click on the subtopic of interest
- a customised form is displayed, containing fields pertinent to the chosen subtopic



- read the description at the top of the form if there is one
- in English or French, provide precise and concise information in each field (e.g. subject, message, organisation, summary, description) or choose a suitable option from the drop-down list (e.g. country, visitor profile)
- if needed, attach file(s) to your form in the **Attachment** field by dragging and dropping it/them, pasting screenshot(s) or browsing for files on your computer
- click on **Create** to submit your request

Warnings

- All fields are obligatory unless otherwise specified.
- If some obligatory fields are left empty or there are fields with incorrect values when you are submitting the form, a warning message will be displayed underneath the inaccurate field(s) indicating the expected input.
- The size of an attachment is limited to 10 MB.

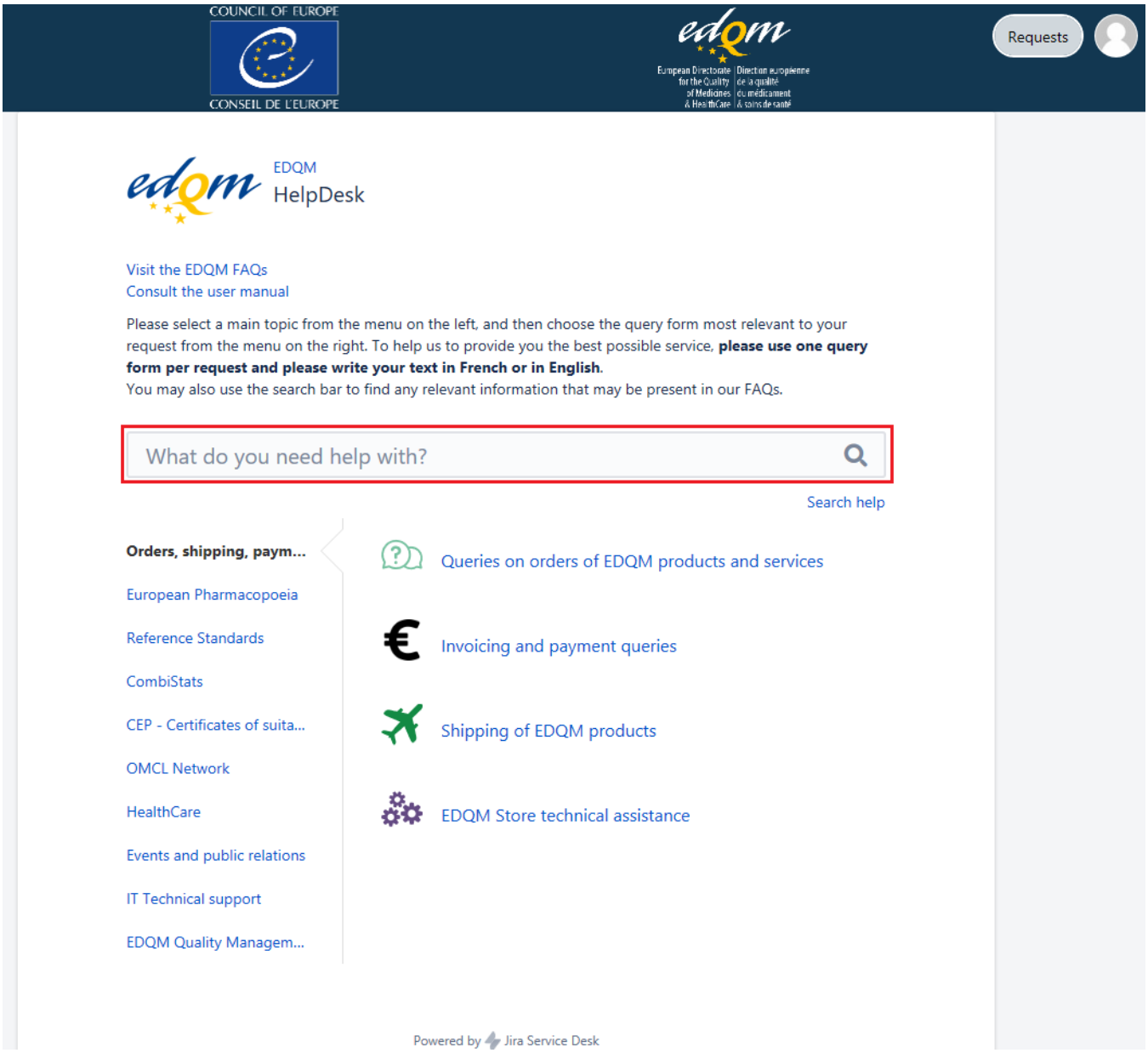
Once you have created your request, you will receive an e-mail notification confirming its receipt.

Self-service FAQs

One of the most important features of the HelpDesk is its self-service FAQs.

Prior to making your request, you can use the integrated search tool to look for FAQ articles that may help you find the solution to your issue. This service is also proposed when you are filling in the subject line of your request.

> FAQ articles are available in English and French.



In the field **What do you need help with?**:

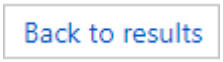
- type in at least one keyword and the system will suggest a list of FAQ articles

> **Tip**
>
> Use the **Search help** link on the right side below the **What do you need help with?** field to learn how to refine your search. In a pop-up, you will get additional information on how to search the knowledge base by using different types of searches, such as OR, AND, NOT, title or exact phrase search.

- click on the article that may contain the solution to your issue

- the content of the article is displayed

- if the article was helpful, click on

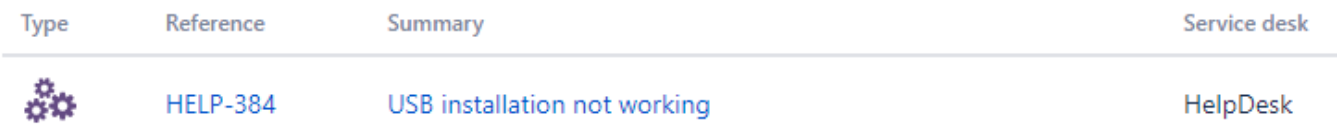
at the bottom to provide feedback to the author and to the other users about its usefulness
- if none of the proposed articles provided the answer to your question, click on 

in the top left corner and create your request

View requests

The fastest and easiest way to view your request is to use the **View request** link provided in your e-mail notification(s). Prior to it, log in with your credentials if necessary.

Also, you can consult your request when already logged on the HelpDesk portal by clicking on the **Requests** button in the upper right corner and choosing any of the two available predefined searches: **My requests** or **All requests**. Furthermore, if you currently have several open requests, you can perform a search (see chapter Search requests) in order to find a specific request, then click on it (either on the link to its reference or its summary).



The request opens, displaying the following information:

- at the top of the page:
  - the reference number of your request (e.g. HELP-438)
  - the subject of your request
  - the status of your request (see chapter Request status and notifications)
  - **Don't notify me** option, allowing you to switch off the notifications by clicking on it. Use the **Get notifications** option that replaces it to easily switch the notifications back on
- from the top to the bottom of the page:
  - the **Activity** log, listing information on the change of status, all comments and the time they were made, any uploaded attachments etc. N.B. The activities are recorded chronologically, with the most recent ones at the top of the list

Update your request

If you want to add an information to your request of your own accord:

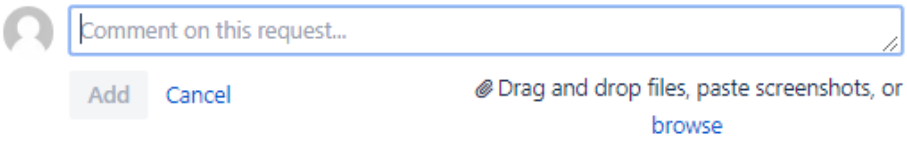
- open your request in one of the following ways:
  - use the **View request** link provided in your e-mail notification(s) to open your request (log in with your credentials if necessary) or
  - log in to the HelpDesk portal with your credentials, find the request you wish to update (see chapter Search requests) and display the request (see chapter View requests)
- update the request by adding a comment to it

A request is updated when a new comment on the request is made.

Add a comment

To add a comment to a displayed request when you are already logged on the HelpDesk portal:

- type in a comment in the **Comment on this request...** field underneath the subject line



- if needed, attach file(s) to your comment by dragging and dropping it/them, pasting screenshot(s) or browsing for files on your computer
- Click on **Add**

> **Tip**
>
> You can add a comment to your request at any time, regardless of its status (see chapter Request status and notifications).

How to reply to a question raised by an EDQM HelpDesk team member?

The fastest and easiest way to reply to a question raised by the EDQM HelpDesk team member dealing with your request is to simply reply to the e-mail you received. Your response will be automatically added as a comment to your request on the portal. Any attachments joined to your e-mail will be saved in your request as the attachments to your comment.

You can also log on the HelpDesk portal and add a comment to your request.

Request status and notifications

Your requests are processed through a predefined workflow. Automatic notifications are sent to your mailbox when:

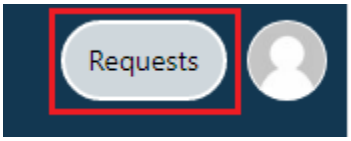
- **Request is created**: When you submit a request through the HelpDesk portal, you will receive an e-mail notification confirming its receipt. This e-mail includes the reference number of your request (e.g. HELP-438), the **View request** link and the **Turn off this request's notifications** option. Your request will have WORK IN PROGRESS status on the HelpDesk portal, which means that it is currently being examined by the EDQM HelpDesk team member in charge of this type of request.

> **Warning**
>
> If you do not receive the e-mail notification, please check your Spam folder. If you do not find the notification there, check if there was a typographical error in the e-mail address you have provided when creating your HelpDesk account.

- **Comment is added**: When the EDQM HelpDesk team member dealing with your request has added a comment, asking for more information, an e-mail notification is sent to you. Your request will have WAITING FOR CUSTOMER status on the HelpDesk portal. You can provide the answer to the EDQM HelpDesk team member handling your request by simply replying to the e-mail you received. Your response will be automatically added to your request as a comment. Alternatively, you can click on the **View request** link in the e-mail notification and enter your credentials if necessary to open your request. Then, add your response in the **Comment on this request...** field and click on **Add** to submit your reply. Your request will change back to WORK IN PROGRESS status on the HelpDesk portal.
- **Request is resolved**: When your request is resolved, you will receive an e-mail notification. Your request will have RESOLVED status on the HelpDesk portal.
- **Request is reopened**: When an EDQM HelpDesk team member reopens the request, i.e. when the resolution of your request turns out to be inadequate and/or incomplete, an e-mail notification is sent to you. Your request will again have WORK IN PROGRESS status on the HelpDesk portal.

Search requests

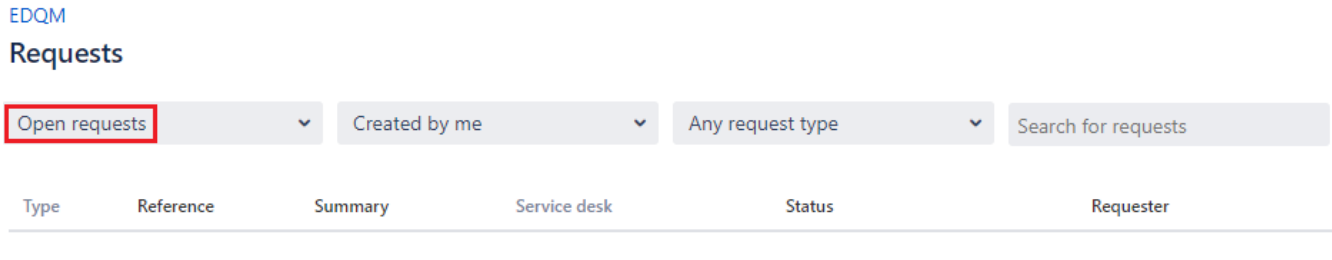
Go to the upper right corner on any HelpDesk page and click on the **Requests** button to access all your current and previous requests:



A small number might be displayed next to this link. It indicates how many unresolved requests you have.

My requests

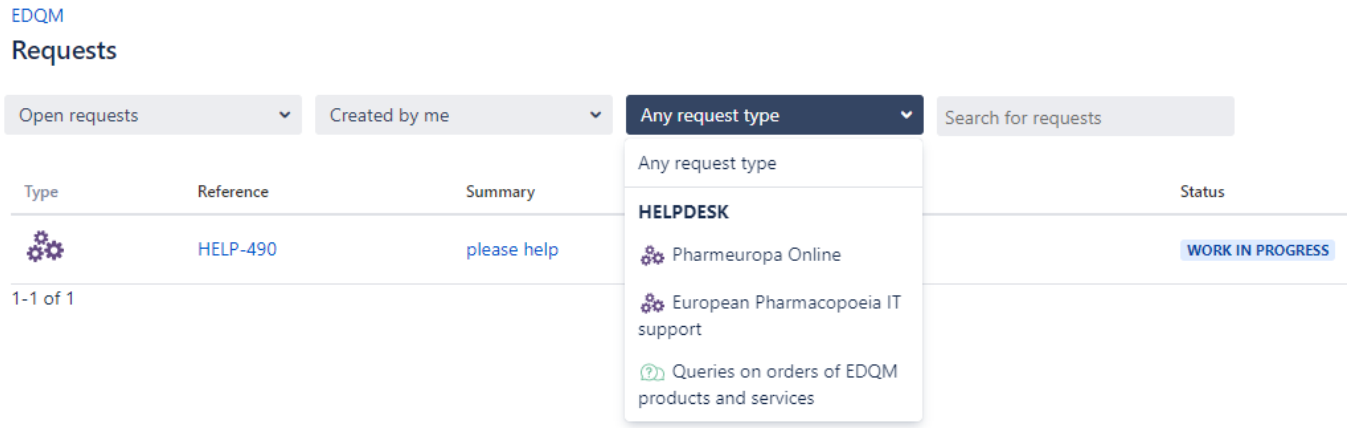
The list of all requests you have created that are currently open will be displayed automatically under the **My requests** search.



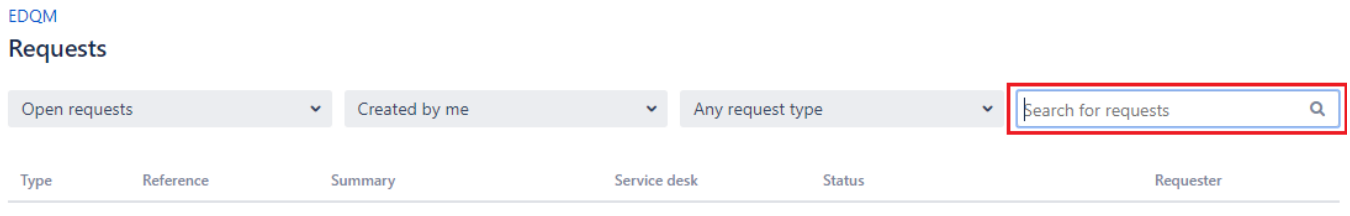
> **Constraint**
>
> You can only view and search for the requests created by you. All other options have been disabled.

In both predefined searches: **My requests** and **All requests**, available when clicking on the **Requests** button, you can perform the following:

- use the filters available in the drop-down lists to search for requests by status (Any status, Open requests or Closed requests), by creator (Created by me) or by request type (Any request type, HelpDesk or the HelpDesk topic(s) you have consulted recently)



- in the **Search for requests** field, type in a keyword that is contained in the subject line of the request you are searching for and press **Enter**



> **Constraint**
>
> Unfortunately, searching through the body of your requests is not possible. Currently, it is only possible to do a search on the subject line of your requests.

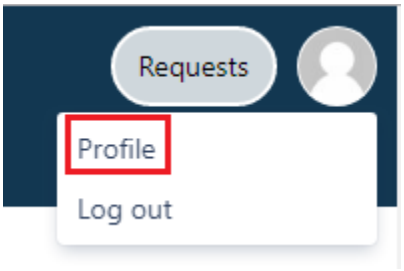
In the list, the following properties of the requests are displayed:

- **Type**: the subtopic under which the request was made
- **Reference**: the reference number of the request (e.g. HELP-438)
- **Summary**: the subject line of the request
- **Service desk**: the HelpDesk
- **Status**: the status the listed request currently has (Work in progress, Waiting for customer or Resolved; see chapter Request status and notifications)
- **Requester**: the person who created the request (in this case, you)

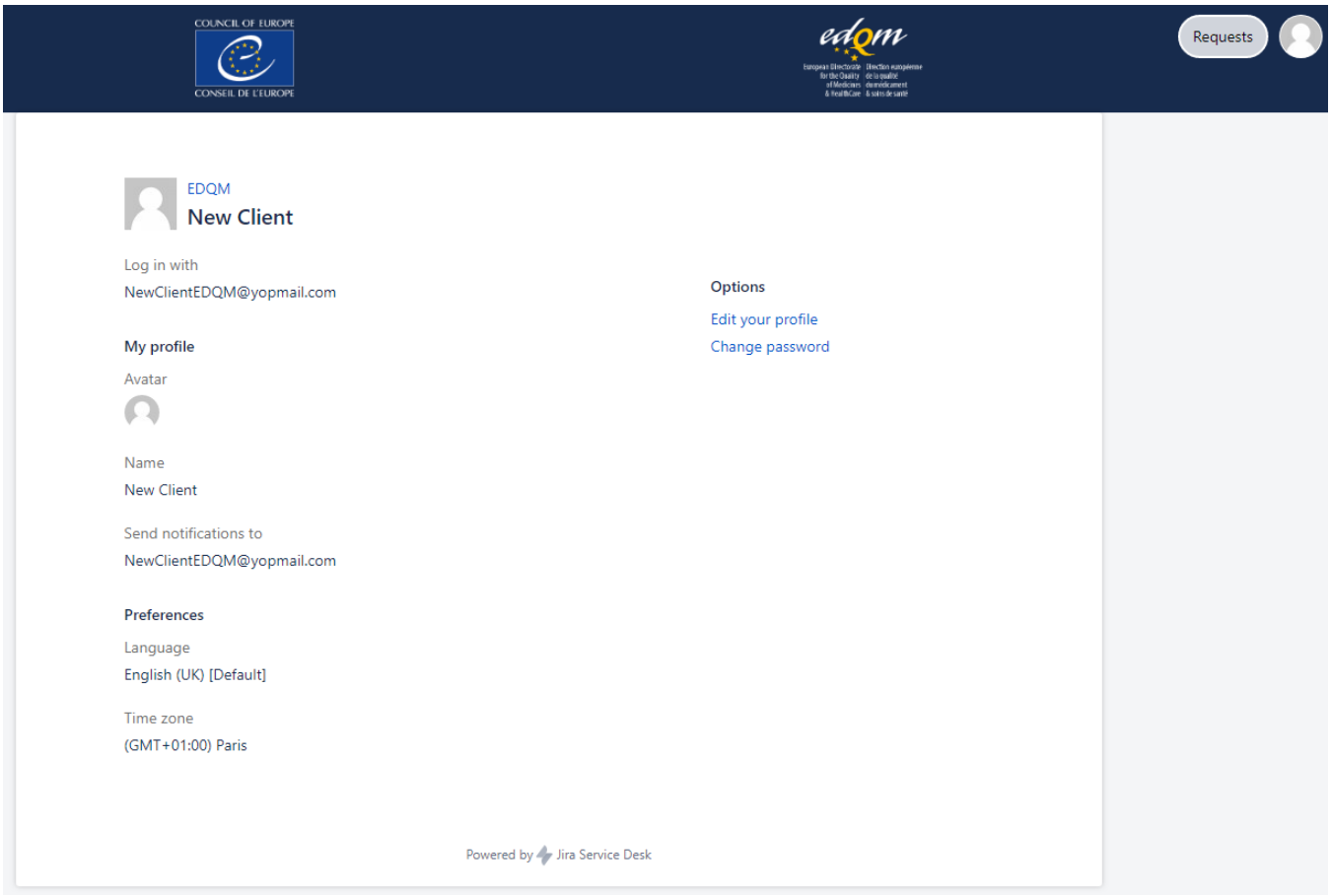
Other features available on the HelpDesk portal

View your profile

Go to the upper right corner on any HelpDesk page, click on the profile icon and choose the **Profile** option:



Your **Profile** page opens.



On this page, you have the option to edit your profile and change the password.

Edit your profile

You cannot edit your e-mail address, as it serves as your user name.

However, you can change your profile picture, the name you registered with, your language preferences and the time zone. In order to do that:

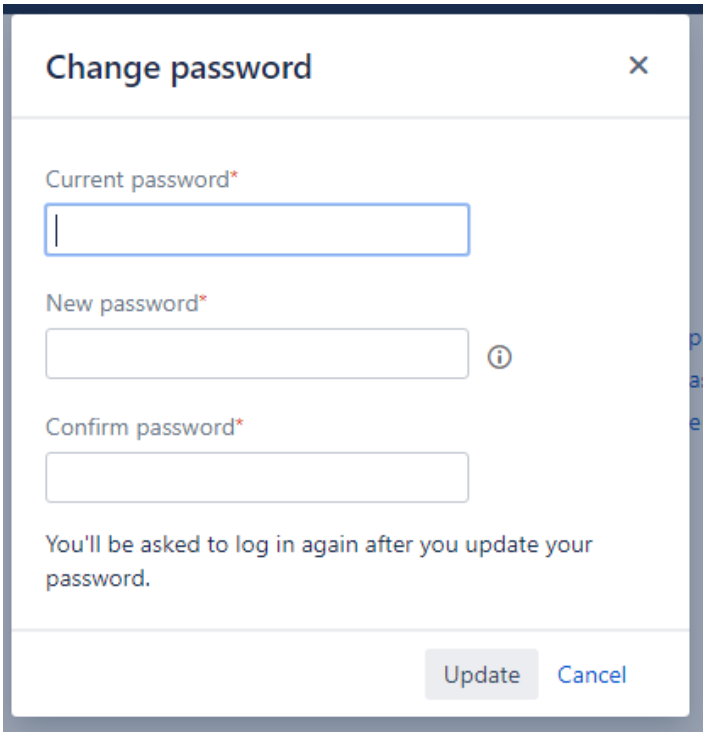
- click on the **Edit your profile** option
- click on **Change avatar** to change your profile picture
    - **Upload avatar** by dragging and dropping the image in JPG, GIF, BMP or PNG format or **Select Image** by browsing for files on your computer
    - click on **Done**
- click in the box containing the **Name** you previously registered to change it

- select your **Language** of preference from the drop-down list offering the choice of more than 20 languages. N.B. The language change will be applied to the tool's inbuilt features, whereas the options specific to the EDQM HelpDesk will continue being available in English only.
- from the drop-down list, select the **Time zone** you are currently in
- click on **Save**

Change password

If you want to change your password:

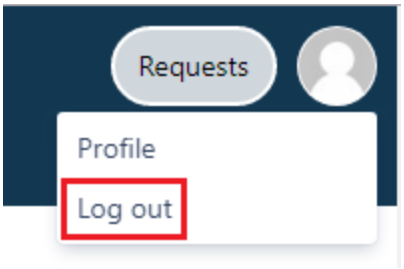
- on your **Profile** page, click on the **Change password** option



- enter your **Current password**
- enter your **New password**
- confirm your new password
- click on **Update**

Log out

Go to the upper right corner on any HelpDesk page, click on the profile icon and choose the **Log out** option:

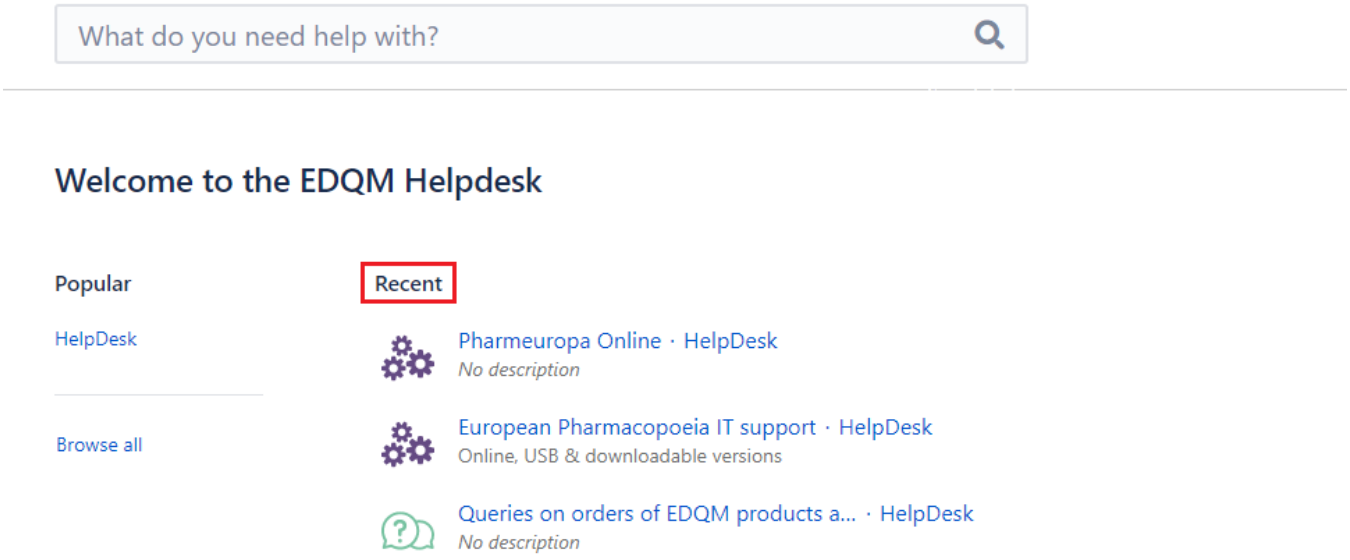


Link to the EDQM FAQs

Use the **Visit the EDQM FAQs** link available on the HelpDesk homepage in the upper left corner to go back to the **EDQM FAQs** page where you can consult the FAQs listed by topics and subtopics in English and French.

Link to the EDQM HelpDesk welcome page

EDQM link available at the top of any HelpDesk page takes you back to the EDQM HelpDesk welcome page.

On the welcome page, you can view and search for your requests, consult the self-service FAQs, view and edit your profile and log out.

After you have already used the HelpDesk and submitted some requests, the shortcut(s) to the subtopic(s) you have consulted recently will be listed and made available for you in the **Recent** section on the welcome page.