

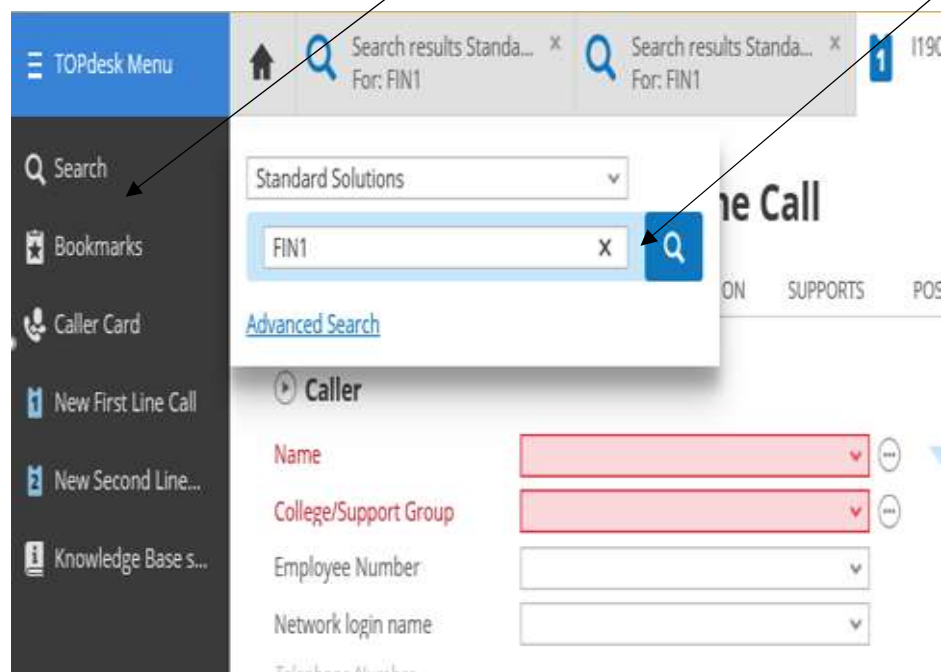
UniDesk - How to Review Existing Standard Solutions

This guide explains how to review Standard Solutions that already exist in UniDesk.

Standard Solutions for Second Line may be reviewed and updated as agreed within your own department.

First Line Standard Solutions: any proposed changes must be agreed with the Relationship Manger prior to any changes being made.

From the main screen, click on "Search". Use the drop down box and select Standard Solutions



All Finance Standard Solutions begin with FIN (short for Finance). The naming convention is **(FIN[x] – [short name for team])[name of Standard Solution]**

e.g **(FIN1-AP) Copy of Invoice**

x can be 1 (First Line) or 2 (Second Line)

short name for teams:

Accounts Payable – AP

Business Planning – BP

Cash Office – Cash

Financial Information Reporting and Strategy Team – FIRST

Finance Systems – FS

Business & Strategy Team –BST

Research Library - RLIB

Income Section – INC

Insurance – INS

Payroll – PAY

Pensions – PENS

Printing Services – PRT

Procurement – PROC

Research Grants – RG

Tax Team – TAX

Type in FIN1 for First Line. Click the search icon.

This opens a view with Standard Solutions that contain FIN1. To put them in alphabetical order, click on the Brief Description header. Use the scroll bar to move up and down or click on the page numbers to move through the list.

The screenshot displays a search results interface for 'Standard Solutions' containing the text 'FIN1'. The search bar at the top shows 'FIN1' entered. Below the search bar, there are buttons for 'New First Line Call', 'New Second Line Call', and 'New Standard Solution'. The main content area is a table with the following columns: Brief Description, Impact, Urgency, Priority, Time Spent, First Line Operator, Second Line Operator, First Line duration, Second Line duration, Call Type, and Closure Code. The table lists 14 items, all with 'Normal' urgency and 'Low' priority. The 'Call Type' for all items is 'Service request'. A sidebar on the left contains navigation options: Search, Bookmarks, Caller Card, New First Line Call, New Second Line..., and Knowledge Base s... At the bottom of the page, there are buttons for 'Request', 'Action', and 'Summary', and a status bar indicating '0 of 246 selected'.

Brief Description	Impact	Urgency	Priority	Time Spent	First Line Operator	Second Line Operator	First Line duration	Second Line duration	Call Type	Closure Code
<input type="checkbox"/> [FIN1-AP] Change of supplier details	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
<input type="checkbox"/> [FIN1-AP] Copy of invoice	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
<input type="checkbox"/> [FIN1-AP] Copy of Remittance	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
<input type="checkbox"/> [FIN1-AP] Creating new supplier	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
<input type="checkbox"/> [FIN1-AP] Credit note from Supplier	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
<input type="checkbox"/> [FIN1-AP] Delete invoice	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
<input type="checkbox"/> [FIN1-AP] Email order confirmation	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
<input type="checkbox"/> [FIN1-AP] Foreign beneficiary	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
<input type="checkbox"/> [FIN1-AP] General workflow guidance	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
<input type="checkbox"/> [FIN1-AP] How do I check supplier payment details?	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
<input type="checkbox"/> [FIN1-AP] International / foreign payments	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
<input type="checkbox"/> [FIN1-AP] Invoice doesn't match	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	

The contents of the standard solution can be viewed within the grey area at the bottom of the screen. Sometimes there is a scroll bar at the edge of these sections, if there is more information that is not fully visible in the grey screen. Double clicking the Standard Solution will open it up, where it may be viewed in full.

Search Results Standard Solutions Filter [Advanced Search](#)

FILTER: Active cards [New First Line Call](#) [New Second Line Call](#) [New Standard Solution](#) [Refresh](#) [More](#) [Settings](#)

Brief Description	Impact	Urgency	Priority	Time Spent	First Line Operate	Second Line Oper	First Line duration	Second Line duration	Call Type	Closure Co
[FIN1-AP] Access to user and pass	Individual(s)	High	Normal	0h 00m	IS Repaire	IS Apps Service W		2 hours	Incident	
[ECDF] - Respond to user	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
[FIN1-AP] Change of supplier details	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
[FIN1-AP] Copy of invoice	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
[FIN1-AP] Copy of Remittance	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
[FIN1-AP] Creating new supplier	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
[FIN1-AP] Credit note from Supplier	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
[FIN1-AP] Delete invoice	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
[FIN1-AP] Email order confirmation	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
[FIN1-AP] Foreign beneficiary	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
[FIN1-AP] General workflow guidance	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	
[FIN1-AP] How do I check supplier payment details?	Individual(s)	Normal	Low	0h 00m		Finance Accounts			Service request	

Request

Action
 Check if there's any reason for the goods being held up. If no concerns please close call status as user confirmed.
 If there is a reason for goods being held, such as held in customs or cancelled orders, please escalate the call to Accounts Payable.

Summary
 Check if there's any reason for the goods being held up. If no concerns please close call status as user confirmed.
 If there is a reason for goods being held, such as held in customs or cancelled orders, please escalate the call to Accounts Payable.