



DEMES Support Job Aid | External

Provides instructions on how to receive support within DEMES

Updated May 29, 2024 | Version 2.0



Table of Contents

Table of Contents.....	2
Introduction	3
Purpose & Objectives.....	3
DEMES Support Overview.....	3
What Operations are Supported by DEMES Support?	3
How to Use DEMES Support	3
Access DEMES.....	4
Register for DEMES	4
Register for Grants Management Portal.....	4
Register for Vendor Portal	4
Log In to DEMES.....	4
Chatbot	4
Access Demi, the DEMES Chatbot	4
Chatbot Options	5
Chatbot: Ask a Question to Search Knowledge Base	5
Chatbot: Create a Case	7
Chatbot: Check Case Status.....	8
Chatbot: Give Chatbot Feedback	9
Knowledge	11
What is Knowledge?	11
Access the DEMES Knowledge Base	11
View a Knowledge Article	11
Rate a Knowledge Article.....	12
Case Management.....	13
Overview	13
Access Case Management.....	13
Create A Case	14
View My Cases.....	15
Available Support.....	17
DEMES Support Resources	17
Feedback	17



Introduction

Purpose & Objectives

The purpose of this document is to provide external users with an overview of the steps one can take to obtain support to get answers to questions or issues they may be having. This document serves as a self-guided learning tool with details on features and accompanying visuals.

DEMES Support Overview

The Florida Division of Emergency Management (FDEM) is consistently looking for ways to improve, scale and modernize our operations and the experience for those involved in our missions. Utilizing existing buildouts on the Salesforce platform, we have built **DEMES - Division of Emergency Management Enterprise Solution**. As part of our goal to provide an enhanced user experience, FDEM has instituted a DEMES Support Model to provide a centralized support mechanism that facilitates **intake, triage and resolution** of user questions and reported issues.

The DEMES Support Model is comprised of three components, the DEMES Chatbot, Knowledge, and Case Management.

- The **DEMES Chatbot (Demi)** is the first level of support, providing a self-service option for users. Users can ask the Chatbot a question to receive curated articles, check the status of a submitted case, or create a new case.
- **Knowledge** is a repository of articles enabling users to locate information more effectively directly in the DEMES portal. Relevant articles can be accessed by searching the knowledgebase or typing in a question to the Chatbot. If relevant matches are found, the user is presented with knowledge articles to review.
- **Case Management** allows users to request support from FDEM, within DEMES, to answer a question or resolve an issue by creating a case. Users provide details regarding their issue to inform the automatic routing of the case to the correct support representative at FDEM. Users will be able to track the status of their case via the platform.

What Operations are Supported by DEMES Support?

DEMES Support officially launched in March 2024 to targeted functions. The initial release of DEMES Support functionality focused on active DEMES Grey Sky operations in the Grants Management portal, including Mutual Aid, State Agency Cost Tracking, & Travel Forms (internal). Functionality was expanded in May 2024 to include Grey Sky Procurement (FDEM's emergency contacting process). Additional functions will be added as new functionality is released. If your operation is not listed in the DEMES menu under the application section, it is not yet available for DEMES Support and you should reach out directly to your FDEM contact for assistance.

How to Use DEMES Support

DEMES Support is comprised of three components, the DEMES Chatbot, Knowledge, and Case Management. To maximize your time and efforts, first leverage the self-service options available to you!

- **Step 1: Explore the Self-Service Options**
 - Use Demi, the **DEMES Chatbot** to view curated articles related to your question/issue
 - Search for **Knowledge Articles**, in the Knowledge base, to access articles related to your question/issue

If the self-service options did not provide the answer to your question or resolve your issue, proceed to step 2.

- **Step 2: Create a Case**
 - Submit a **case** to request support from an FDEM representative



Access DEMES

Register for DEMES

To access DEMES, individuals and vendors must be registered.

Register for Grants Management Portal

1. For instructions on how to register for the DEMES Grants Management Portal, visit the DEMES [website](#). A job aid is available under the General Resource section.
2. Begin the registration process by clicking [Register \(fdemportal.com\)](#).

Register for Vendor Portal

1. For instructions on how to register for the DEMES Vendor Portal, visit the DEMES [website](#). A job aid is available under the General Resource section.
2. Begin the registration process by clicking [Register \(fdemportal.com\)](#).



Log In to DEMES

1. Once registered for DEMES, you can Login to the available portals.
 - a. Grants Management Portal: [Login \(fdemportal.com\)](#)
 - b. Vendor Portal: [Login \(fdemportal.com\)](#)
2. Your portal landing page will appear, providing access to various functionality and applications within DEMES.

Chatbot


The **DEMES Chatbot (Demi)** is the first level of support, providing a self-service option for external users. Users can ask the Chatbot a question to receive curated articles, check on the status of a submitted case, create a new case, and/or provide the chatbot feedback.

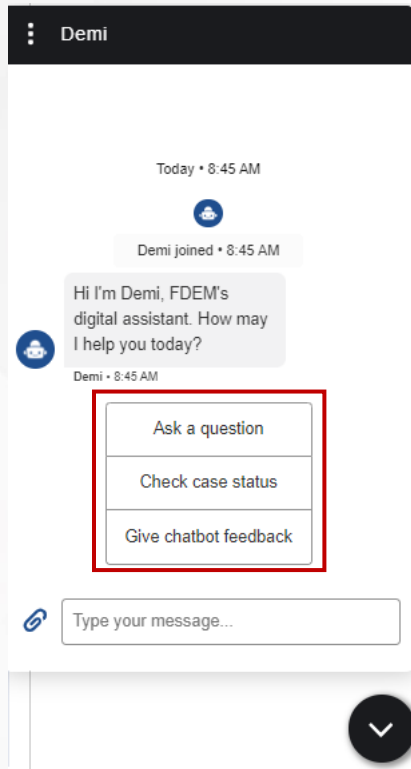
Access Demi, the DEMES Chatbot

1. Demi, the DEMES Chatbot, is located in the bottom right corner of supported application pages.
 - a. If you do not see the chatbot icon, your application may not be supported by the DEMES Support functionality. Expanded functionality is scheduled.
2. Find the circle icon . If you hover over it, you'll see the following message: "Hello. Have a question? Let's Chat."
3. **Click** the circle icon  to open the chatbot.



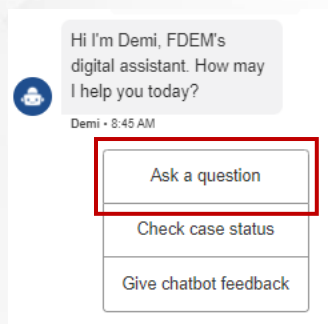
Chatbot Options

1. To **Open** the DEMES Chatbot, click the circle icon  located in the bottom right corner of the page.
2. The Chatbot will open (far right side of screen), with a welcome message and a few initial options.
 - a. Ask a Question
 - b. Check Case Status
 - c. Give chatbot feedback
2. **Select the button** that best reflects your needs. If uncertain, start by clicking the **Ask a Question** button.



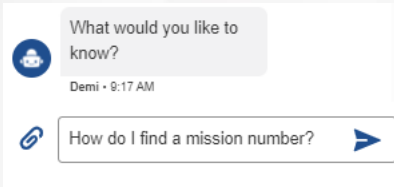
Chatbot: Ask a Question to Search Knowledge Base

1. To initiate support, select the **Ask a Question** button.





- The chatbot will respond asking you what you would like to know (i.e. what you need help with)
- In the box provided, **type in your question** - be specific as the chatbot searches using key words. (i.e. *How do I find a mission?*). **Click arrow/enter** (right side) to submit your question.



- Based on the information entered, chatbot, will search the DEMES Knowledge Base for articles that match your key words to help answer your question. Relevant articles will be provided, including the article name, summary, and link to full content.
- To view the full content of the article, **click the blue link**.

Title: Find and Apply for a Mission

Summary: How agency's can find & apply for a Mission

Full Article Link:
<https://fdem--testprod.sandbox.my.site.com/grants/s/article/Find-and-Apply-for-a-Mission>

- A page containing the knowledge article content and images will appear for your review. Steps to complete a process will be outlined.

Find and Apply for a Mission

How agency's can find & apply for a Mission

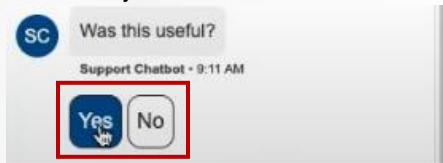
Feb 1, 2024 · Knowledge

Procedure Steps

Find a Mission

- A Financial Point of Contact, or FPOC, of an Assisting Agency can find a mission one of two ways:
 - The Mutual Aid Coordinator has invited the Assisting Agency to apply to a mission. If this is the case, the FPOC will receive an email notification with details of the mission and a unique link to apply to the mission. The link in the email will take the FPOC directly to the Mission record on the **Mutual Aid Portal**.
 - The FPOC can locate a mission independently by logging onto the DEMES Portal. The FPOC logs into DEMES Portal and selects the Mutual Aid tile.

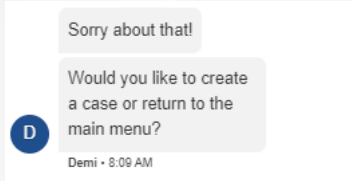
- Close out your session with the chatbot by indicating if the article was helpful. Select **Yes** or **No**.



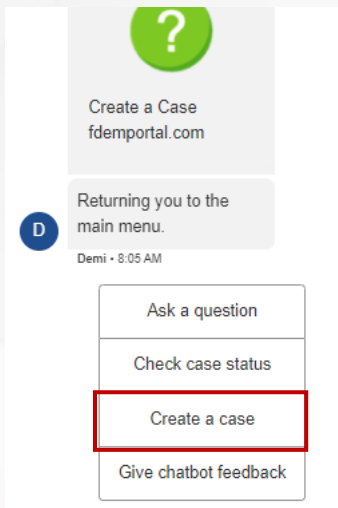


Chatbot: Create a Case

1. If no articles are found or if the articles provided do not answer your question or resolve your issue, your next step is to **Create a Case**.



2. When prompted, click the **Create Case** button.



3. The chatbot will provide a link to create a new case. **Click** the link to be directed to a new page where you can begin the case creation process.

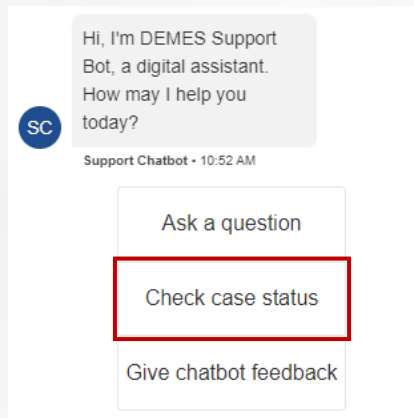
Create A Case:
<https://fdem--testprod.sandbox.my.site.com/grants/s/create-demes-support-case>

4. To create a case, follow the instructions outlined in the Create a Case section on [page 14](#).

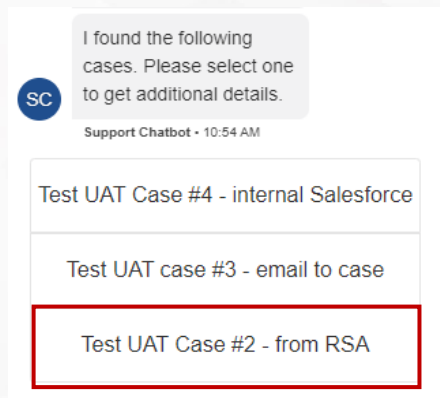


Chatbot: Check Case Status

1. A user can locate and check the status of a submitted case via the Chabot.
 - a. Note: Cases are assigned to individual contacts, thus only the individual who submitted the case will be able to track its status.
2. From the chatbot main menu, select the **Check Case Status** button.



3. The chatbot will search and return up to three open cases associated with your contact.
4. Review the cases provided and **select the button** for the case you would like to view.



5. Once link is selected, the chatbot will return information regarding that case, including status of case, case subject, and case open date. A link to view the case record will be provided.



6. To view a listing of your submitted cases, [click the blue link](#).

Status: Escalated
Subject: Help with Missions
Date Opened: 2024-03-07T19:35:34.000+0000

Click here to view all your cases in a detailed view.:
<https://fdem--testprod.sandbox.my.site.com/grants/s/case/Case>

7. Your case record page will appear, containing a listing of your cases and their status. To find a particular case, search via the Subject field.

8. Click the **Case Number** (blue link) to view the details of a specific case.

Case N...	Owner Name	Contact Name	Subject	Status	Priority	Date/Time Opened
00007877	Travel Forms Bureau Admin	Meredith Walker	Test UAT Case #4 - internal Salesfor...	Escalated	Medium	2/26/2024, 11:24 AM
00007871	Sweta Bhupendra Rawal	Meredith Walker	Test UAT case #3 - email to case	In Progress	Medium	2/26/2024, 11:11 AM

Chatbot: Give Chatbot Feedback

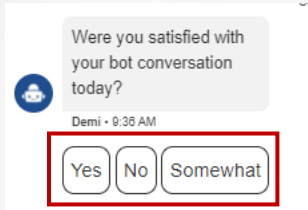
1. To provide FDEM feedback on your experience with the chatbot, click the **Give Chatbot Feedback** button.

Hi I'm Demi, FDEM's digital assistant. How may I help you today?
Demi - 9:34 AM

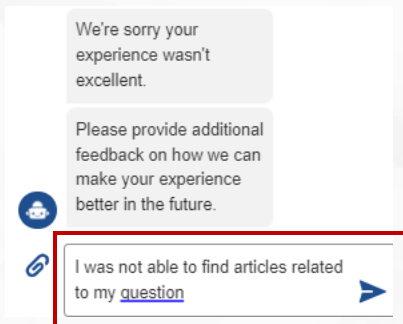
Ask a question
Check case status
Give chatbot feedback



2. The chatbot will ask if you were satisfied with the support provided and will prompt you to select an answer. Select the button that best fits your situation – **Yes**, **No**, or **Somewhat**.



3. If you select
 - a. **Yes**, the chatbot will return you to the chatbot main menu
 - b. **Somewhat or No**, the chatbot will ask you to provide additional context for your answer (ie. justification) in the text field provided
4. Type how Chatbot could have provided better service in the field provided. **Click the arrow/enter** to submit your feedback.





Knowledge

What is Knowledge?

Knowledge is a repository of articles enabling users to locate information more effectively directly in the DEMES portal. The Knowledge base contains an inventory of articles, developed by FDEM, to provide a self-service option for external users. Content is developed by the subject matter experts and reflects the most up to date information on the business processes and DEMES functionality. The value of Knowledge is that users can find answers and resolve issues without having to reach out to FDEM for assistance. Users can also provide feedback on the articles to inform FDEM on edits that need to be made.

Access the DEMES Knowledge Base

1. From the
 - a. **Grants Management Portal** main page, click the **FAQ** button in the header bar.
 - b. **Vendor Portal** main page, click the **More** tab in the header bar, and then select **FAQ** from the drop-down menu.
2. The Knowledge Base page will appear. On this page one can...
 - a. View articles via the DEMES Knowledge Base: **Knowledge** tab
 - b. View a case that you have submitted: **My Cases** tab
 - c. Create a new Case: **Create a Case** tab

View a Knowledge Article

1. To view available articles, [click the blue link](#) of the corresponding application.

All Articles
Agency Cost Reporting
Mutual Aid

2. A listing of available articles will appear. [Click the article title](#) to review its detailed content.

Articles

Are recipients permitted to use Fund payments to pay for unemployment insurance costs incurred by the recipient as an employer?

50 Views · Feb 5, 2024 · Knowledge

Are governments required to submit proposed expenditures to Treasury for approval?

31 Views · Feb 5, 2024 · Knowledge



3. The knowledge article page will appear, along with other related and trending articles. Review the content to obtain the answer you need.

- a. *One can access other articles by clicking on the article title.*

AGENCY COST REPORTING

Are costs associated with increased solid waste capacity an eligible use of payments from the Fund?

Feb 5, 2024 · Knowledge

Question
Are costs associated with increased solid waste capacity an eligible use of payments from the Fund?

Answer
Yes, costs to address increase in solid waste as a result of the public health emergency, such as relates to the disposal of used personal protective equipment, would be an eligible expenditure.

Title	URL Name
Are costs associated with increased solid waste capacity an eligible use of payments from the Fund?	Are-costs-associated-with-increased-solid-waste-capacity-an-eligible-use-of-payments-from-the-Fund

Related Articles

- May recipients use Fund payments to expand rural broadband capacity to assist with distance learning and telework? 62
- If a recipient must issue tax anticipation notes (TANs) to make up for tax due date deferrals or revenue shortfalls, are t... 41
- Are expenses associated with contact tracing eligible? 59
- Are recipients permitted to use Fund payments to pay for unemployment insurance costs incurred by the recipient as an empl... 67
- Are recipients required to use other federal funds or seek reimbursement under other federal programs before using Fund pa... 42

Trending Articles

Rate a Knowledge Article



1. On the Knowledge article, you can indicate if it was helpful by clicking the **thumbs up or thumbs down** icon.
 - a. Information informs FDEM on how useful/relevant the content is and how the content could be improved to better serve your needs.

Was this article helpful?

2. If you select the **thumbs up icon**, your selection will be recorded.
3. If you select the **thumbs down icon**, new fields will appear asking for additional information to inform FDEM on edits that should be made to the article content.
 - a. Select a general reason for decision
 - b. Share recommended edits and provide feedback on how the content could be improved
 - c. Upload a file, if useful/relevant

Was this article helpful?


Choose a general reason

-- Choose a general reason --

Feedback

Please, leave us some feedback...

Upload Files

 Upload Files Or drop files

Submit

4. Click **Submit** to record your feedback.



Case Management

Overview

Case Management allows users to submit a request for support to resolve a user issue. Users will provide details regarding their issue to inform the automatic routing of the case to the correct support representative at FDEM. Cases will be triaged by FDEM internal staff, and the status of the case is viewable to its original submitter.

Note:

1. There are multiple pathways for a user to create a case in DEMES, including
 - a. Via the chatbot
 - b. FAQ page (Create a Case)
 - c. Mutual Aid RSA page
 - d. Email DEMES.Support@em.myflorida.com
 - i. Be advised submissions via this method will have delayed responses
2. Users can view the status of submitted cases
 - a. Via the Chabot using the Check Case Status button
 - b. Clicking on the link included in the FDEM confirmation email when the case was created
 - c. Visiting the My Cases page under the FAQ tab

Access Case Management

1. From the
 - a. **Grants Management Portal** main page, click the **FAQ** button in the header bar.
 - b. **Vendor Portal** main page, click the **More** tab in the header bar, and then select **FAQ** from the drop-down menu.
2. The Case Management page will appear. On this page one can...
 - a. Create a new Case: **Create a Case** tab
 - b. View a case that you have submitted: **My Cases** tab
 - c. View articles via the DEMES Knowledge Base: **Knowledge** tab



Create A Case

1. From the Case Management page, click the **Create A Case** button in the header bar.
2. A new page will appear containing fields needed to submit a case.
 - a. Application: If able, select **application** associated with your issue to drive case routing.
 - i. Type of Request & Type of Sub Request fields are dependent on the application type selected
 - ii. If your application is not listed, it is not yet supported by the DEMES Support functionality
 - b. Type of Request: Select **option** from listing to define where support is needed
 - c. Type of Sub Request: Select **option** from listing to further define the type of support needed
 - d. Subject: Enter in a brief **high-level description** of your need and/or issue
 - e. Description: Describe, in detail, your issue and/or support needed
 - i. Provide as much detail as possible to accelerate response time from FDEM
 - f. Attachment: Upload screen shots, error messages, etc

The screenshot shows a form with the following fields and callouts:

- Application**: A dropdown menu with "--None--" selected. Callout **a** points to this field.
- Type of Request**: A dropdown menu with "--None--" selected. Callout **b** points to this field.
- Type of Sub Request**: A dropdown menu with "--None--" selected. Callout **c** points to this field.
- Subject**: A text input field. Callout **d** points to this field.
- Description**: A large text area. Callout **e** points to this field.
- Add Attachment**: A button with a plus icon. Callout **f** points to this button.
- Submit**: A large blue button at the bottom of the form.

3. Click **Submit** to create a case.
4. The case page will automatically appear. Record the **Case #** for future reference.

The screenshot shows a table with the following data:

Case Number	Application	Type of Request	Status	Priority	Account Name
00007911	State Agency Cost Reporting	General	New	Medium	Seminole County Fire Department

5. A confirmation email will be sent when a case is created to the case submitter. The email contains the case number, a link to view the case in DEMES, and case details. To learn more about the case page, visit page 17.



View My Cases

- From the
 - Grants Management Portal** main page, click the **FAQ** button in the header bar.
 - Vendor Portal** main page, click the **More** tab in the header bar, and then select **FAQ** from the drop-down menu.
- The Case Management page will appear. Click the **My Cases** tab.
- Your case record page will appear, containing a listing of your cases and their status. One can view,
 - Case number
 - Case subject
 - Case status (New, In Progress, Pending Enhancement/Bug Fix, Under Review, Closed)
 - Case priority status: *will always default to medium – FDEM staff can adjust based on nature of request*
 - Date & time case was opened

Cases
My Submitted Cases ▾

Updated 6 minutes ago

Q Search this list... ⚙️ 🔄

Case N...	Owner Name	Contact Name	Subject	Status	Priority	Date/Time Opened
40 00007786	Mutual Aid Support	Meredith Walker	need access for Mutual aid	In Progress	Medium	1/12/2024, 10:32 AM
41 00007785	Mutual Aid Support	Meredith Walker	Help me with this RSA	Closed	Medium	1/5/2024, 3:08 PM
42 00007784	Meredith Walker	Meredith Walker	Please provide Tanner With Login	New	Medium	1/3/2024, 4:09 PM
43 00007783	Meredith Walker	Meredith Walker	Please provide access to Kevin Gellar	In Progress	Medium	1/2/2024, 4:26 PM

a **b** **c** **d** **e**

- Case status definitions
 - New:** Cases, once created, are automatically assigned this status and retain it until an FDEM representative is assigned to review/work the case
 - In Progress:** Cases are automatically assigned this status when an FDEM representative has been assigned to work the case and will retain this status while the case is being worked
 - Pending Enhancement/Bug Fix:** This status is assigned when the case is awaiting build to assist in resolution of the case
 - Under Review:** Cases are assigned this status when activity on the case has exceeded FDEM service standards, thus generating a flag (red triangle) to initiate immediate attention
 - Closed:** FDEM representatives assign this status when the user request has been resolved and no further work will be done on the case



5. To view a case record, click the **Case Number** (blue link) of the desired case.

Cases
My Submitted Cases ▾

Updated 6 minutes ago

Search this list...

Case N...	Owner Name	Contact Name	Subject	Status	Priority	Date/Time Opened
40 00007786	Mutual Aid Support	Meredith Walker	need access for Mutual aid	In Progress	Medium	1/12/2024, 10:32 AM
41 00007785	Mutual Aid Support	Meredith Walker	Help me with this RSA	Closed	Medium	1/5/2024, 3:08 PM
42 00007784	Meredith Walker	Meredith Walker	Please provide Tanner With Login	New	Medium	1/3/2024, 4:09 PM
43 00007783	Meredith Walker	Meredith Walker	Please provide access to Kevin Gellar	In Progress	Medium	1/2/2024, 4:26 PM

6. The case record page will appear. On this page you will be able to view.

- Case Details:** Case #, associated application, status, case priority, account (i.e. agency)
- Case Information:** Case details, including case origin, Type of Request and Type of Sub Request
- Account Information:** Account the submitter is associated with, and the submitters contain information
- Emails:** Communications associated with the case, that have been sent by FDEM to the case submitter
- Files:** Documents provided by case submitter during the email to case process
- Attachments:** Files that were uploaded to case record by the case submitter when the case was creating in the portal. More files can be uploaded, if needed. Click the **Upload Files** button.

Case
Test - portal

a Case Number: 00007855 | Application: Mutual Aid | Type of Request: General | Status: New | Priority: Medium | Account Name: [Seminole County Fire Department](#)

b Case Information
Case Number: 00007855
Application: Mutual Aid
Type of Request: General
Type of Sub Request: Enhancement Request

c Account Information
Account Name: [Seminole County Fire Department](#)
Contact Name: [Meredith Walker](#)
Email: sweta.rawal@sfdc.slalomlab.com

d Emails (1)
Subject: Thank You f... | From Address: donotreplyfd... | To Address: sweta.rawal@... | Message Date: 2/23/2024, 3:08 PM

e Files (0) | Add Files | Upload Files | Or drop files

f Attachments (1) | Upload Files | Screenshot 2... | Feb 23, 2024

7. To view files in any of the sections on the right (Email, Files, Attachments) click the **blue link**.

8. Case submitters are not yet able to leave a comment (i.e. communicate within DEMES) on their case record for their FDEM representative. Case submitters should respond to the confirmation email they received from FDEM when the case was created of they need to reach out to their case representative.



9. When your case is resolved, FDEM will send the case submitter an email notification. The email provides an opportunity to provide feedback (2 question survey) to share your thoughts and ideas with FDEM regarding your experience.

Available Support

DEMES Support Resources

For more information, please visit the DEMES [website](#). The site contains support resources, including support contacts, job aids, and FAQs. If personalized support is needed, please use the DEMES Chatbot to obtain knowledge articles or submit a case.

Feedback

Your input is important to the success of this initiative. Please share your feedback and ideas for enhancements via the DEMES Support process by creating a case.