



Help Desk Web User Guide

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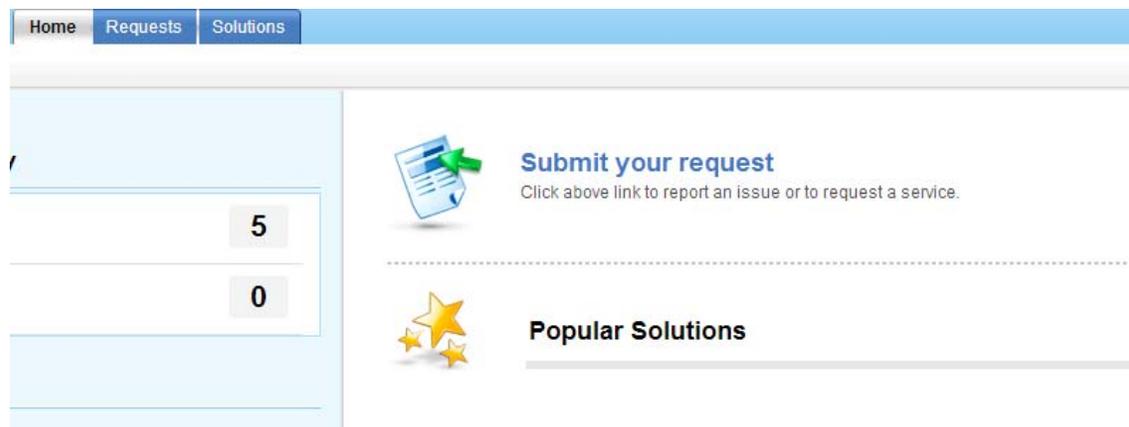
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Create an Incident

When you need to report a failure or problem of your system to the IT help desk team, then send a request to the team. There are different modes of placing a request to the IT help desk team, such as web-based form, e-mail notification, and phone call. ServiceDesk Plus provides options to log details of a request originating in any of the above-mentioned forms.

To create a new incident using the web-based form

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Submit Your Request** link available just below the tabs in the header pane.

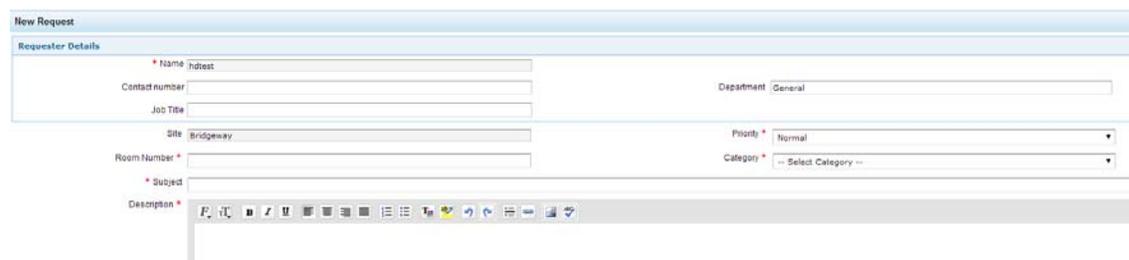


Classifying Category

The **Category** drop-down box, lists the categories under which an incident can be classified. Select the relevant category to which your incident request can be grouped.

Describe Incident Request

Once you have assigned the category and priority for the incident, describe the request in detail. The detailed request has two components to it, namely **Subject** and **Description**. In the **Subject** field, provide a relevant title to the incident that will exactly summarize your request content. Then, provide a detailed description with any other associated details relevant to the incident in the **Description** text box.

The screenshot shows the 'New Request' form in ServiceDesk Plus. The form is titled 'New Request' and has a 'Requester Details' section. The fields are: Name (with a red asterisk), Contact number, Job Title, Department (with a dropdown menu showing 'General'), Site (with a dropdown menu showing 'Bridgeway'), Room Number (with a red asterisk), Priority (with a dropdown menu showing 'Normal'), Category (with a dropdown menu showing '-- Select Category --'), Subject (with a red asterisk), and Description (with a red asterisk). The Description field has a rich text editor toolbar below it.

Add Attachments to the Request

1. Below the **Description** text box, click the **Attach File** button. Click this. This opens an **Attach File** pop-up window.



1. Click the **Browse** button.
2. From the file chooser window, choose the file to be attached.
3. Click **Open**.
4. Click **Attach File**. The chosen file gets listed in the table below the browse field. If you have more files to choose repeat the steps 2,3, and 4 till you have attached all the relevant files.
5. Click **Attach File**. The selected files are attached to the request.

Once you have done all the above, click the **Add request** button. The request is added to the list of requests and can be viewed from the request list view which can be invoked by clicking on the **Request** tab in the header pane.

Requests

The Request module allows you to create incident requests and service requests instantly to your IT help desk team. You can view all the requests that you have raised till date and keep a track of its status.

Apart from this, you can add additional information for a request in the form of **Notes**, **Print** only the required information and **View the Survey Results** for completed and closed requests.

Request List View

The Request List view page organizes and displays all the tickets you have raised to the help desk team. Click **Requests** tab in the header pane. The page redirects to the request list view page.

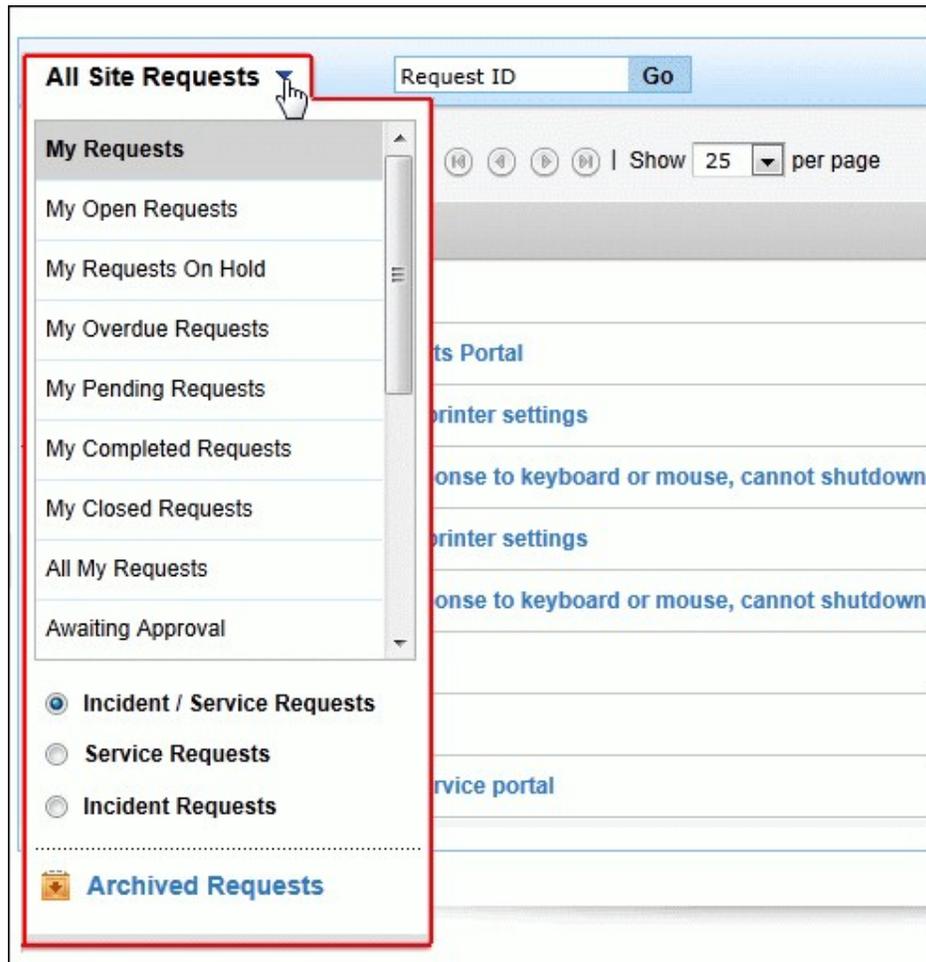
In the Request List view, you have the facility to,

- View requests (incident and service requests) based on default filters
- View Archived Requests
- Create Incident and Service Requests
- Search requests based on Request ID and column-wise search
- Customize the columns in the List view

All Site Requests						
Request ID		Go				
New Incident Showing : 1 - 9 of 9 [Home] [Previous] [Next] [Last] Show 25 per page						
ID	Subject	Requester Name	Assigned To	DueBy	Status	Created Date
34	Black Screen on startup	Gail McDonal	Jeniffer Doe	-	Open	Sep 30, 2011 10:31 AM
33	Unable to access Students Portal	Gail McDonal	Jake Thomas	Sep 30, 2011 12:31 PM	Open	Sep 30, 2011 10:31 AM
32	Unable to configure the printer settings	Gail McDonal	Kelly Mathews	Sep 30, 2011 12:31 PM	Open	Sep 30, 2011 10:31 AM
31	Laptop is frozen, no response to keyboard or mouse, cannot shutdown	Gail McDonal	Kelly Mathews	-	Open	Sep 30, 2011 10:30 AM
14	Unable to configure the printer settings	Nancy Drew	Kelly Mathews	Aug 1, 2011 11:00 AM	 Open	Jul 30, 2011 06:27 PM
11	Laptop is frozen, no response to keyboard or mouse, cannot shutdown	Nancy Drew	administrator	Jul 7, 2011 10:50 AM	 Open	Jul 6, 2011 05:50 PM
6	Unable to fetch mails	George Mallroy	administrator	Jul 7, 2011 09:34 AM	Closed	Jul 6, 2011 05:34 PM
5	Password Reset	Gail McDonal	administrator	Jul 7, 2011 09:28 AM	 Open	Jul 6, 2011 05:28 PM
4	Unable to login to self service portal	Gail McDonal	administrator	Jul 7, 2011 09:25 AM	 Open	Jul 6, 2011 05:25 PM

Representation of Icons in the list view:

-  - indicates that the First Response time and Resolution time are overdue.
-  - indicates overdue requests.
-  - indicates First response time is overdue.
-  - perform column-wise search for requests.
-  - select columns to be displayed in the list view.



This page includes various useful functionalities such as,

2. **Filter drop-down menu:** The Filter drop-down menu consists of default filter list and options to restrict the list view to display **Service Requests**, **Incident Requests** or both. Through the filter, you can also access the **Archive Requests**.
3. **Searching Requests based on Request ID:** View the details of a request instantly by entering the Request ID and click **Go** button.

4. **Column-wise Search:** Perform column-wise search for specific Groups, Requesters, Departments, Sites and so on.
5. **New Incident:** Create new incident requests instantly using the **New Incident** button.
6. **Set the number of requests per page and navigation buttons:** You can set the number of requests to be displayed in the request list view page.
7. **Organizing the Request Order:** Sort the order of the requests. Click the column name link to sort requests in ascending or descending order.

Modes of Creating an Incident Request

There are different modes of creating an incident request. One of them is using the web-based form. To use the Web-based form, you must have login access to the ServiceDesk application. If you do not have a login access to the application, then you can submit your request in either of the other two modes:

1. **E-mail** the request to the help desk team. This e-mail will automatically be changed to a new request in the ServiceDesk Plus application and any actions to be performed on the request will be immediately taken into notice.
2. Call up the IT help desk agent and report an issue or explain the nature of your request. The help desk agent will manually feed in the details into the application through the web-based New Incident form available in the Request module.

View Request Details

Follow the steps given below to view a request available in the ServiceDesk Plus Request module:

1. Click the **Requests** tab in the header pane. The next page lists all the requests raised by you in the ServiceDesk Plus application. If there are any requests that have not been assigned any technician then they will appear in bold font.
2. Click the **Subject** link of the request that you want to view. The **Request details** page is displayed.
3. The request header has the **Request ID**, the **Subject** of the request, its **Status** and **Priority**. The Request tab consists of the **Requester name**, **Created Date**, **Due Date**, **Request summary** and **Request Description**. If there is a conversation thread, then the same can be viewed under **Request Conversations**. Below this, the details of the request such as the mode, request type, assigned technician and group, and so on are displayed. You can also view the details of the requester from the **Requester Details** block. If there are any attachments to request, click the file that is attached to view the same.

4. Click the **Resolution** tab to view the resolution for the request.
5. To view the history of the request, click the **History** tab.
6. To view all the replies that have been sent to you, click the **Conversations** button. All the notifications will be listed in the ascending order of the date and time when they were sent.

The **Created Date** field displays the time when you created the request. Based on the priority of the request, the **Due Date** is calculated and is displayed beside the **Created Date** in the request details block. If you have received any response for the request, then you will see the **Responded Date** also in the view request page.

Close Request

ServiceDesk Plus provides you the privilege to reopen or close your requests from the Self Service Portal. When the technician moves the status of your request to Resolved, a **Close** button is displayed in the request details page. And, when the technician moves the status of your request to Closed or Resolved, a **Reopen** button is displayed in the request details page.

NOTE: The Reopen and Close buttons are made available to requesters only if the administrator has enabled these options in the Self Service Portal Settings.

Close a Request

You can close requests when the technician has moved the request status to Resolved. To close resolved requests,

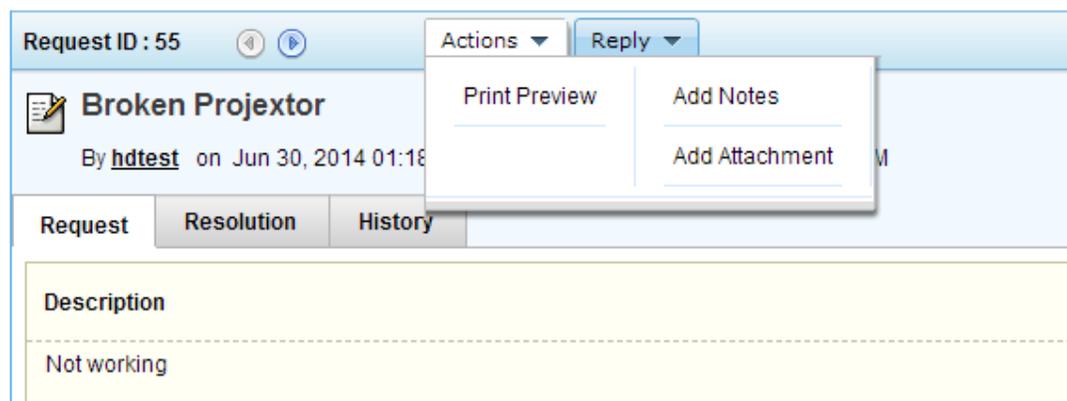
1. Click the **Requests** tab in the header pane.
2. Click the **Subject** link of the request that you want to close.
3. In the Request details page, click the **Close** button. A **Close Request** dialog box appears.
4. Enter relevant **Comments** for closing the request.
5. Click **Close** button. The status of the request is moved to Closed. If you do not want to close the request, then click **Cancel** in Close Request dialog box.

Print the Request

You can print the details of a request from the Request details page. ServiceDesk Plus also gives you an option to print only the required information.

To print a request,

1. Click the **Requests** tab in the header pane.
2. Click the **Subject** link of the request that you want to print.
3. Click **Actions** drop-down menu and select **Print Preview** link. The Print Preview of the request opens in a pop-up window.
4. You can customize the required information that you want to print by select the check box beside the fields.
5. Click **Print** button.
6. The default printer associated with your workstation is invoked. Set the required options and click **OK**. You can collect the printed copy of the request at the printer that is linked to your workstation.

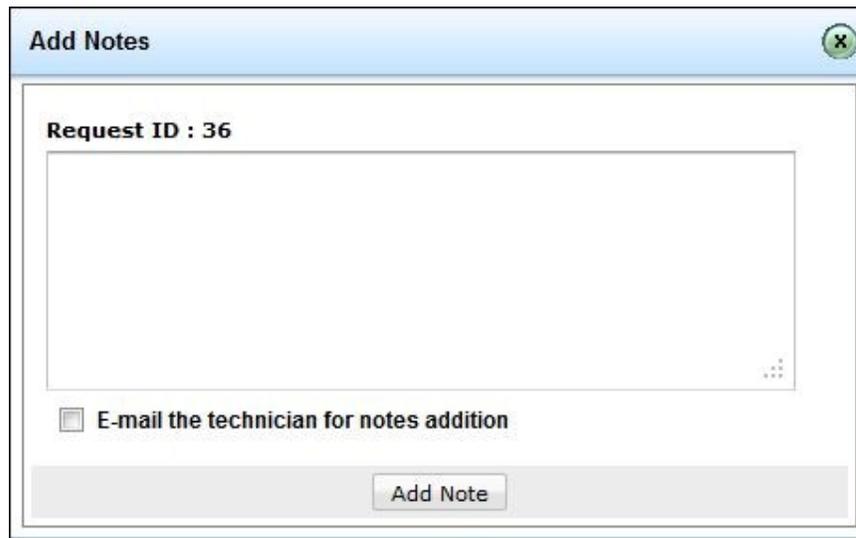


Add a Note

After posting a request, if you want to add additional information about the request, then you can do it in the form of Notes.

To add a note to a request,

1. Click the **Requests** tab in the header pane.
2. Click the **Subject** link of the request to which you would like to add a note.
3. In the Request details page, click Actions drop-down menu. Select Add Notes link. The **Add Notes** opens in a popup.



Add Notes

Request ID : 36

E-mail the technician for notes addition

Add Note

4. Enter your content in the text box below the **Request ID**.
5. You can notify the technician in-charge of your request about the addition of the note by selecting **E-mail the technician for notes addition** check box.
6. Click **Add Note** button. The note is added at the bottom of the request along with the date and time.

You can add any number of notes to a request. The notes added to a request will be displayed at the bottom of the request in the **View Request** page in the descending order, that is, the recently added note will be displayed first.

NOTE: You will not be able to delete any of the notes in a request even though you have added them.

View Request History

The various actions performed on a request can be viewed in the History tab. This is essential for future reference and audit purpose.

To view the request history,

1. Click the **Requests** tab in the header pane.
2. Click the **Subject** link of the request for which you want to view the history.
3. In the **Request** details page, click the **History** tab. This displays the complete history of actions that were performed on the request from the time of its creation.

The details that are displayed in the History are in the ascending order with the earliest performed action shown at the top of the page and the latest action at the bottom of the page.

View All Replies

The IT help desk team sends notifications to you during the course of solving the issue submitted. Your responses to the technicians will also be displayed as threads / conversation. You can view these conversations from your own login view.

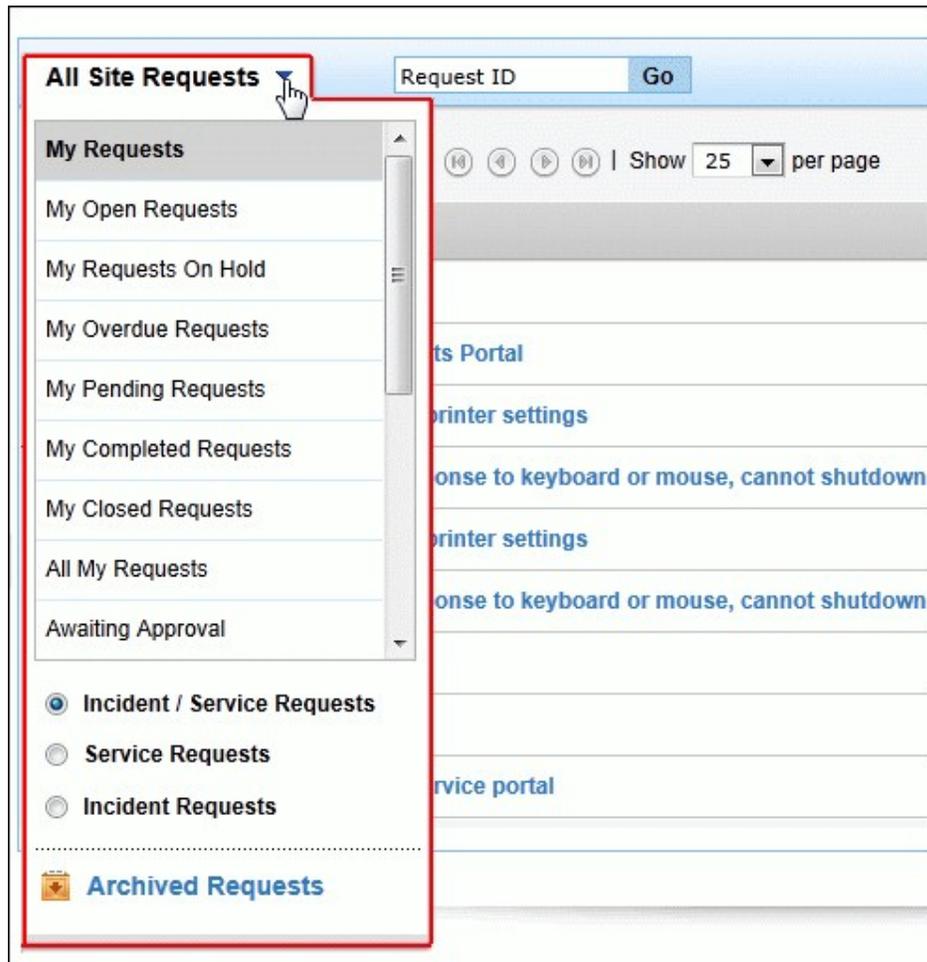
1. Click the **Requests** tab in the header pane.
2. Click the **Subject** link of the request to view the conversations.
3. In the **Request** details page, the various mails between you and the technician in-charge will be displayed under the head **Conversations**.

View Requests based on Filters

You can view requests based on default filters and also restrict the list view to display only **Service Requests**, **Incident Requests** or both **Service and Incident Requests**. You can also view the list of your archived requests by clicking **Archived Requests** link

To view requests based on filters,

1. Click the **Requests** tab in the header pane.
2. Select the **Filter drop-down** menu to view the default filters.



- **My Open Requests**
This is the default status on opening the request list view page. All your open requests will be listed under this option.
- **My Requests On Hold**
All your assigned requests that are kept on hold will be listed under this option.
- **My Overdue Requests**
All your assigned requests that have exceeded the due date are listed under this option.
- **My Pending Requests**
All your assigned unfinished requests are listed under this option.
- **My Completed Requests**
All your assigned requests that are closed will be listed under this option.
- **My Closed Requests**
All your requests with the status as closed will be listed under this option.
- **All My Requests**
All your requests irrespective of the status will be listed under this option.
- **Awaiting Approval**
All your requests that are awaiting approval from the concern authority are listed under this option.

- **Waiting for my update**
If you are assigned as the Intermediate Editor for any service requests, then the service requests that are waiting for your update is listed under this option.
- **Updated by me**
If you are assigned as the Intermediate Editor for service requests, then the requests updated by you are listed under this option.

If you have the permission to view requests raised from your Department or Site, then the following filters will be available to you.

- **Site Open Requests**
All the open requests raised from your site are listed under this option.
- **Site Requests On Hold**
All the assigned requests raised from your site that are on hold is listed under this option.
- **Site Closed Requests**
All the requests raised from your site that are closed is listed under this option.
- **Site Completed Requests**
All the requests raised from your site that are completed is listed under this option.
- **All Site Requests**
All requests raised from your site is listed under this option.