

ManageEngine[®]
ServiceDesk Plus

9 ways ServiceDesk Plus simplifies your life as an IT service desk manager



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Introduction

As enterprises evolve their digital services, IT infrastructures are becoming increasingly complex. This evolution leads to a rise in ticket volume, a faster change cadence, and an expanding asset estate. Consequently, IT service desk managers, who are at the forefront of IT service delivery, must transition from traditional roles to become strategic enablers of business services. This shift requires them to embrace automation, AI-driven analytics, and intelligent workflows that not only handle service demands efficiently but also foster innovation, optimize resource use, and align IT operations with the organization's broader goals. The role of IT service desk managers is critical in transforming IT from a cost center into a strategic enabler that supports innovation and growth within the enterprise.

ServiceDesk Plus was created with this reality in mind. It is a comprehensive ITSM platform designed to be simple to deploy and packed with powerful AI and workflow automation capabilities. This e-book, **9 ways ServiceDesk Plus simplifies your life as an IT service desk manager** will help you understand and leverage the numerous capabilities of the platform to improve the productivity of your IT service desk. Each chapter delves into the specific features and functionalities that make a significant difference in your day-to-day operations. This will help you focus on what truly matters: Delivering exceptional service and driving your team towards peak productivity and excellence.

Chapter 1: Streamlining core service management operations



As an IT service desk manager, your plate is always full—juggling tickets, managing teams, and keeping everything on track. ServiceDesk Plus enables you to set up a well-oiled machine that helps you run core IT service desk operations on autopilot. Here are the set of features in the platform that helps you streamline service management.

a. Gathering comprehensive, precise information using custom templates

- ServiceDesk Plus offers a simple drag-and-drop template editor (Fig. 1) to create custom templates that accelerate ticket logging while also capturing precise data on incidents, service requests, problems, changes, releases, projects, contracts, and more. You can configure these templates with custom sections and fields, and even prefill them as required.
- To enhance control, you can configure permissions for requesters to view or edit specific fields on incident and service request templates while also publishing them to designated technicians and user groups.
- You also have the option to encrypt certain fields and mark sensitive data as PII, thereby complying with data protection regulations such as GDPR and HIPAA.
- The Form Rules feature helps generate interactive forms that dynamically adapt and change depending on the user's responses.
- Zia, the native AI assistant, intelligently predicts field values, automating categorization, prioritization, and assignment of requests. Zia's predictive intelligence is powered by powerful, proprietary ML models.

The screenshot displays the 'Form Customization' interface in ServiceDesk Plus. The top navigation bar includes tabs for 'Technician View', 'Requester View', 'Resource Info', 'Approvals', 'Associated SLAs', 'Tasks', 'Checklists', and 'Form Customization'. The main form area is titled 'Untitled section 1' and contains several fields: 'Name' (with a 'Change' icon), 'Comments', 'Workflow / Life cycle' (set to 'Service request for IT gadgets'), 'Status' (set to 'Approval Pending'), 'Request Type' (set to 'Service Request'), 'Impact' (set to 'Affects User'), 'Impact Details', 'Mode' (set to '-- Select Mode --'), 'Urgency' (set to 'Normal'), 'Level' (set to 'Tier 1'), and 'Priority' (set to 'Normal'). A 'Requester Details Section' is visible at the bottom. The right sidebar shows 'Service Category' (Hardware) and 'Template' (New laptop). Below this is a 'Drag & Drop Fields' section with 'Available' and 'New' tabs. The 'Available Fields' list includes: 'Access from:', 'Access to:', 'Application Module', 'Application that's causing issues', 'Approver(s)', 'Are you experiencing this issue...', and 'New section'. At the bottom of the form are 'Save', 'Save and Configure Requester', and 'Cancel' buttons.

Figure 1: Template editor in ServiceDesk Plus.

b. Automating ticket triage: categorization, prioritization, & assignment

- Apart from AI-powered ticket triage, you can predefine categories, sub-categories, and other essential fields for every incident and service request template. When creating the default request template to ensure categorization and assignment of the technician to the right issue. This ensures that the right IT team or technician can start working on them.
- Ticket categorization and assignment can be further refined by leveraging the Business Rules functionality (Fig. 2), which facilitates criteria-driven actions. This empowers you to perform field updates, send notifications, and execute custom functions. Furthermore, you can set conditions to automatically abort ticket creation for known issues. This reduces unnecessary ticket volume and minimizes duplicate requests, allowing your team to focus on resolving new and unique problems

Setup

Instance Configurations > Users & Permissions > Mail Settings > Customization > Templates & Forms > Automation > **Business Rules** > Service Level Agreements > Life Cycles > Triggers > Schedules > Custom Actions > Notification Rules > Closure Rules > Delegation > Technician Auto Assign > Asset Auto Assign > Workflows > Conflict Detection > Probes & Discovery > User Survey > Data Administration > General Settings > Apps & Add-ons > Developer Space > Zia > Zoho Circuit >

Setup / Automation / Business Rules / Incident

Search in Setup

Edit Incident Business Rule

Following **Business Rules** are also associated with 12 more site(s) Site : Base Site

Rule Definition

Name* Network Description all requests related to network are dispatch and assigned to network group

Execute when a request is ☒ Created ☒ Edited ☐ Deleted

Execute during ☒ Any time ☐ Within Operational Hours ☐ Outside Operational Hours

☒ Turn on cascade execution ☒ Enable Rule

Conditions

When a request arrives ☒ Apply conditions based on criteria ☐ Apply conditions using custom functions ☐ Apply no condition

Category is Internet Routers Switches

AND Subject contains network problem

Execute rule when a request is ☒ Every time ☐ When any field in the condition is edited

Actions

When a request arrives ☒ Execute custom actions ☐ Abort process execution

Configure the fields to be updated

Group	Network « Base Site	+
Technician	Anderson	+

Override request values with business rule values ☒

+ Select Custom Actions

Save Cancel

Figure 2. Business Rules in ServiceDesk Plus.

- While the Priority Matrix feature assigns ticket priorities based on urgency and impact, the Technician Auto Assign feature (Fig. 3) evenly distributes incoming tickets using round-robin and load balancing algorithms to ensure a fair workload. Additionally, you have the option to exclude specific technicians and requests from the auto-assignment process.
- Zia can analyze incoming tickets and assign them to specific technicians based on historical ticket data that factors in the technicians' ability to resolve them.

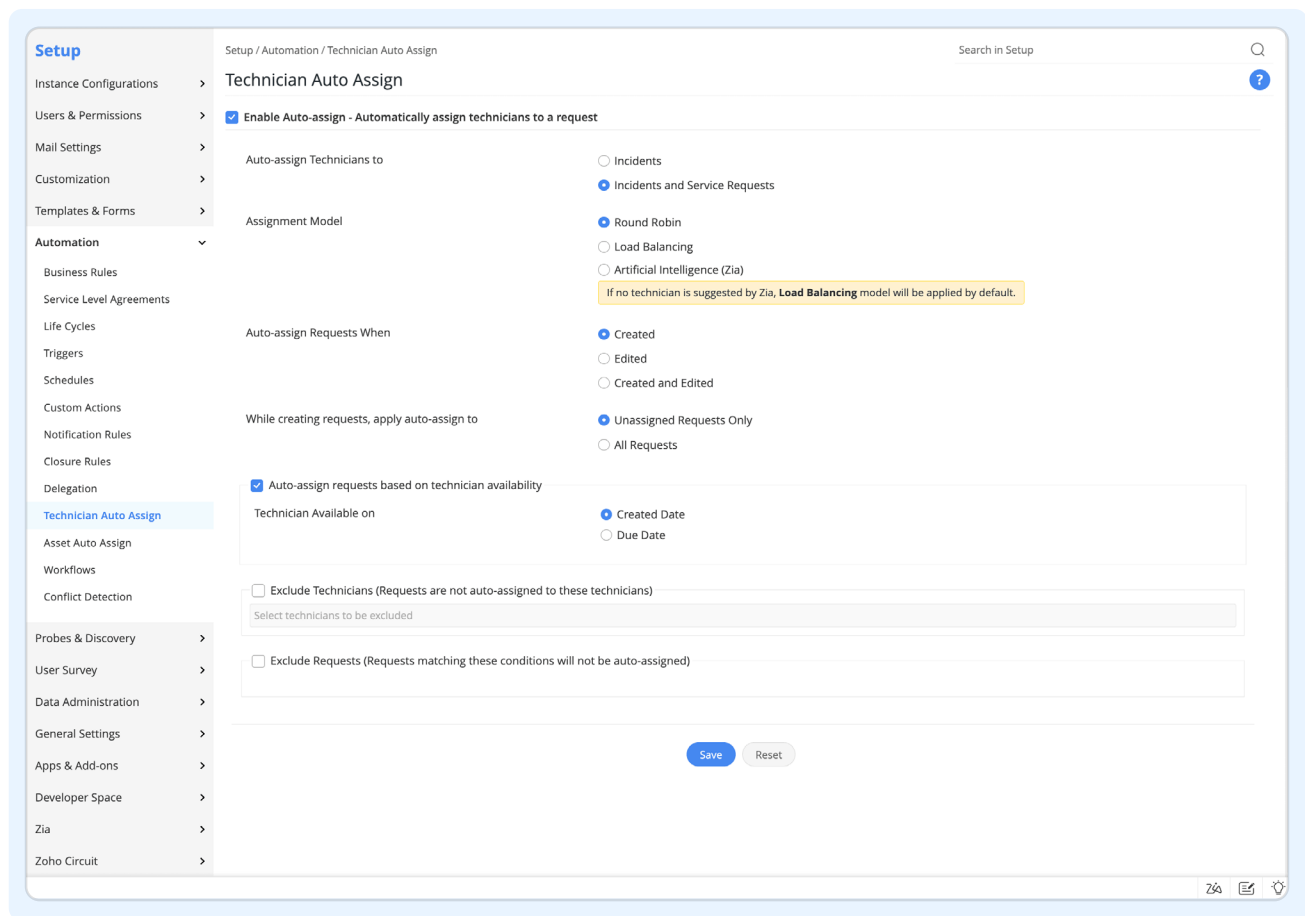


Figure 3: Technician Auto Assign.

c. Designing efficient workflows for ticket handling

- Build customizable workflows (Fig. 4) on a visual canvas to create a structured approach for managing various ITSM processes, such as incidents, requests, problems, changes, releases, and asset management. You can design multi-path workflows using action nodes to manage approvals, tasks, notifications, conditional checks, and path transitions. At any point in your workflow, you can incorporate low-code custom actions to enable a wide array of automated functions. Additionally, workflows can be associated with templates for efficiency and consistency in managing processes.

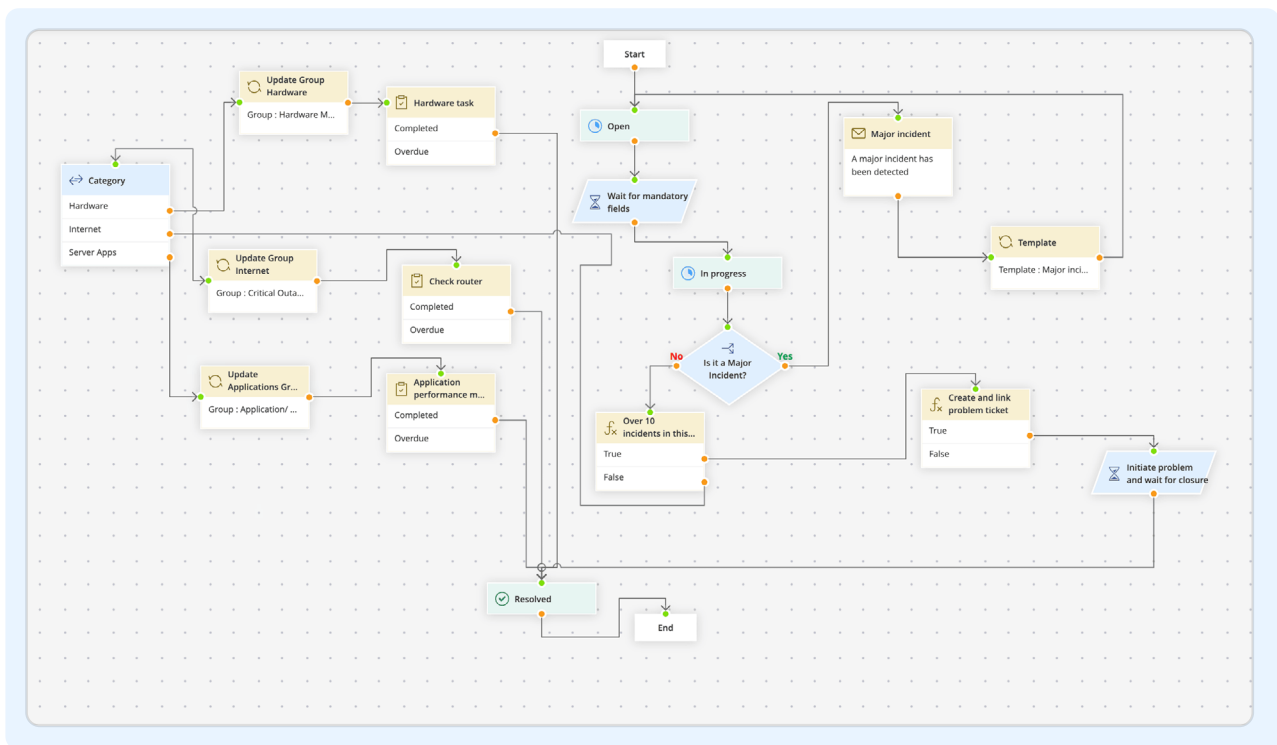


Figure 4: A sample workflow in ServiceDesk Plus.

- Guide your technicians through the service delivery process with recommendations and automated ticket handling, from initiation to closure. By configuring a life cycle (Fig. 5), you can define the precise path that a request or asset should follow. Technicians can see clear next steps at each phase, based on preconfigured transitions, ensuring a smooth flow through the life cycle. You can automate actions such as updating details, adding tasks, sending notifications, or executing custom functions before, during, or after a request or asset transitions to a new state or status. Associating a life cycle with multiple templates makes tracking and closing requests more efficient, providing you with greater control and visibility over the request handling process.

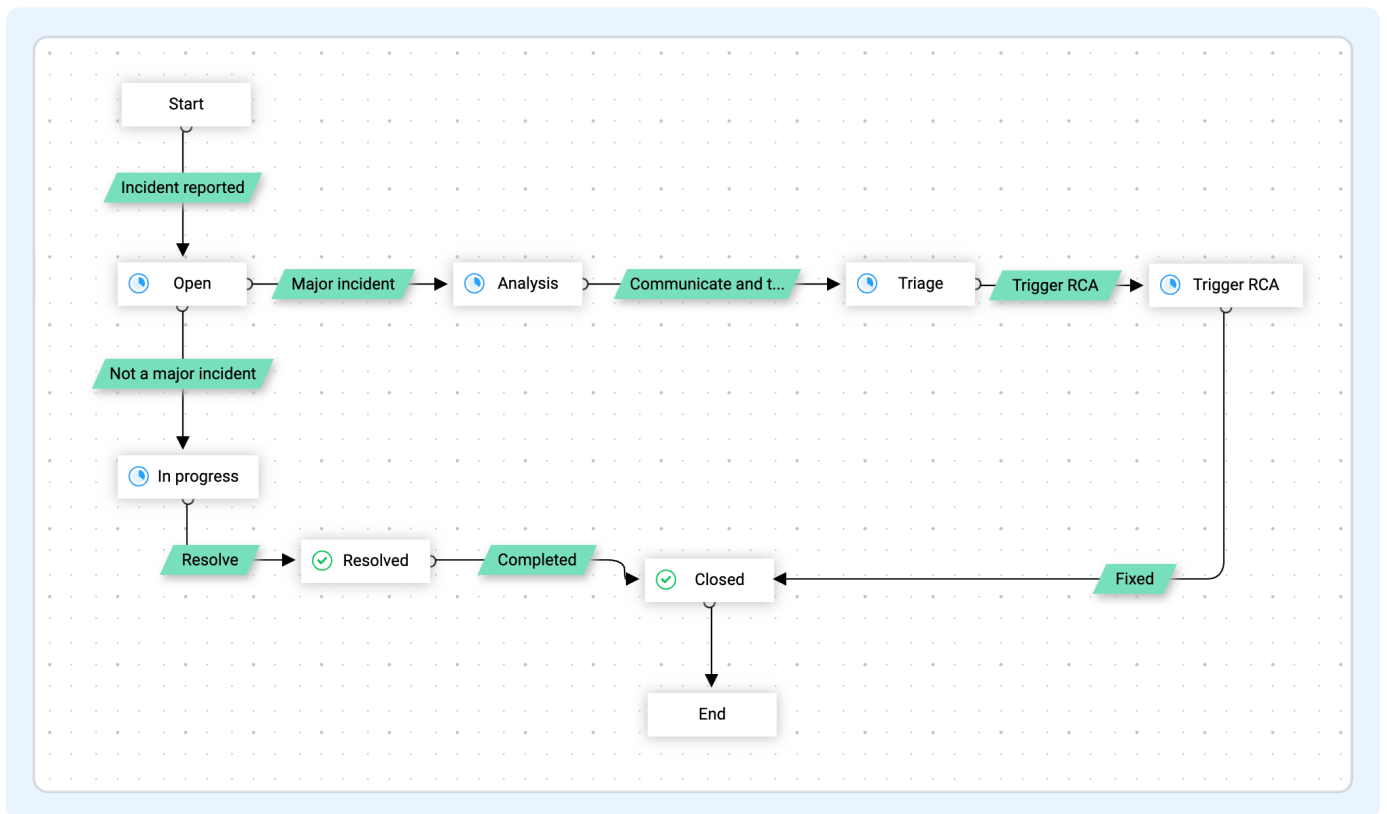


Figure 5: Incident life cycle.

Chapter 2:

Enhancing service desk productivity



As the demands on service desks continue to escalate, it becomes essential to identify effective strategies for enhancing both efficiency and responsiveness. Let us delve into how you can utilize ServiceDesk Plus to significantly boost the productivity of your service desk team.

a. Enforcing accountability through SLAs

- With ServiceDesk Plus, you can establish SLAs to enforce timely resolution of incidents and service requests. This ensures clear expectations around service delivery, helping you meet them consistently. SLAs also serve as a performance benchmark, allowing you to monitor, measure, and optimize your service desk's efficiency.
- SLAs (Fig. 6) can be customized to define specific response times and escalation rules to ensure timely resolutions. For critical incidents, you can configure SLAs to extend beyond regular business hours, covering holidays and weekends. This guarantees continuous attention to high-impact issues, preventing delays and minimizing business disruptions even outside standard working hours.
- Escalations can be configured to act either proactively or reactively. You can achieve this by choosing to escalate before or after SLA violations occurs. In the event of an SLA breach, escalations can be triggered for both response times (at one level) and resolution times (up to four levels). This flexibility allows you to designate specific individuals or roles for escalation, customize notification methods (email or SMS), and perform other service desk actions like raising the priority level, reassigning the ticket to a different group or technician—all of which help expedite ticket resolution.

- SLAs can be applied based on specific ticket attributes such as priority, impact, urgency, department, requester profile, service category, or VIP status. Your service desk technicians can also place tickets on hold while awaiting a response from the end-user or input from another team, effectively pausing the SLA timer and preventing unnecessary SLA violations.

Edit Incident SLA

Following SLAs are also associated with 12 more sites

Name * Critical SLA
Site * Base Site
Description Default SLA for website

Conditions

When a request arrives: ☒ Apply conditions based on criteria ☐ Apply no condition

Template is Application sign in Unavailable to access website Major Incident
ERP Issues ERP Issues in Zylker Unresponsive application

OR Priority is High Major Incident

Any request matching above conditions should be

Responded within: Days 0 Hours 0 Minutes 30
Resolved within: Days 0 Hours 4 Minutes 0

☒ Should be resolved irrespective of operational hours
☒ Including holidays
☒ Including weekends

If response time has elapsed

☒ Enable Level 1 Escalation
Escalate After: Days 0 Hours 0 Minutes 15
Escalate To: Regional Assistant Manager of Request
+ Select Custom Actions

Notification: Critical outage notification

Notify Organization Roles: CIO, COO, CEO, Regional Manager of Tech...
Mode Email
Subject Critical outage notification
Message CRITICAL ALERT: We have received network alerts that servers are down, and traffic has dropped significantly.

If resolution time has elapsed

☒ Enable Level 1 Escalation
Escalate Before: Days 0 Hours 0 Minutes 30
Escalate To: Reporting Manager of Technician Group Head of Request
+ Select Custom Actions

Configure the fields to be updated

Technician Hugh
Override request values with service level agreement values

☒ Enable Level 2 Escalation
Escalate After: Days 0 Hours 2 Minutes 0
Escalate To: Department Head of Technician Site Manager of Technician Regional Incharge of Technician
+ Select Custom Actions

No actions are configured

☐ Enable Level 3 Escalation
☐ Enable Level 4 Escalation

Figure 6: SLA for incident in ServiceDesk Plus.

b. Accelerating technician response with resolution and response templates

- Set up response and resolution templates to enable your team to send quick, consistent replies with ease.
- Additionally, leverage the ChatGPT-powered Reply Assist (Fig. 7) in ServiceDesk Plus, which suggests relevant responses and refines drafts based on the request's content, optimizing communication and saving valuable time.

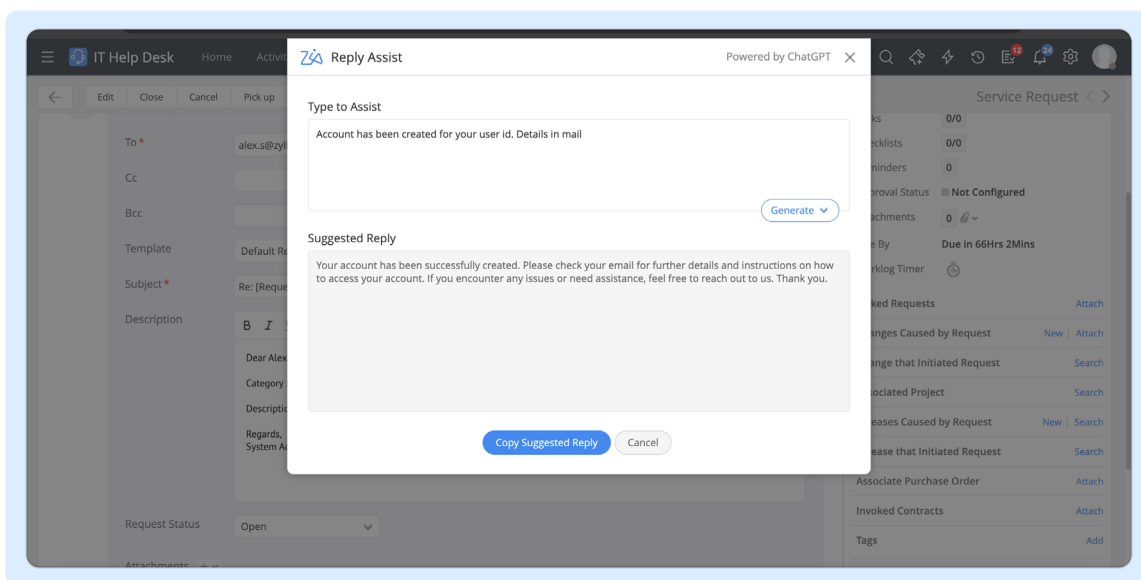


Figure 7: Reply assist in ServiceDesk Plus.

c. Automating request approvals using a multi-stage approval process

- Enable up to five levels of approval stages for service requests, designating specific approvers by roles such as CEO, reporting manager, CIO, etc., or by individual users. You can configure multi-stage approval either in the service request templates (Fig. 8) or within the incoming requests.

- Configure automatic email notifications for approvals and specify whether the request requires consent from all approvers, a single designated approver, or a percentage of the approvers.

The screenshot displays the 'Edit Service Template' interface. On the left, under 'Approval Configuration', there are two toggle switches: 'Automatically send approval notifications' (turned on) and 'Assign technician only to an approved service request' (turned off). To the right of these are 'Show approval status to requesters' (turned off) and 'Approval Rule' (set to 'Everyone to Approve'). Below this is the 'Approval Details' section, which lists five stages (I to V). Each stage has an 'Add Approver +' button and a 'Clear All' link. Stage I has one approver: 'Reporting Manager of Requester'. Stage II has one approver: 'Department Approver of Technician'. Stages III, IV, and V have no approvers listed, with a note 'Select Organization Roles and Approval Users'. On the right side of the interface, there is a table with two columns: 'Service Category' and 'Corporate Website'. The first row shows 'Template' and 'Request a CRM account'. At the bottom of the main panel are 'Save' and 'Cancel' buttons.

Figure 8: Multi-stage approval in the service request template.

d. Facilitating team collaboration with effective task management

- Create, manage, and organize multiple tasks for each request, with the capability to assign them to technicians or teams, trigger tasks based on specific conditions, estimate the required effort, and factor in any additional costs. You can add the tasks either in the request templates (Fig. 9) or directly within the incoming requests.

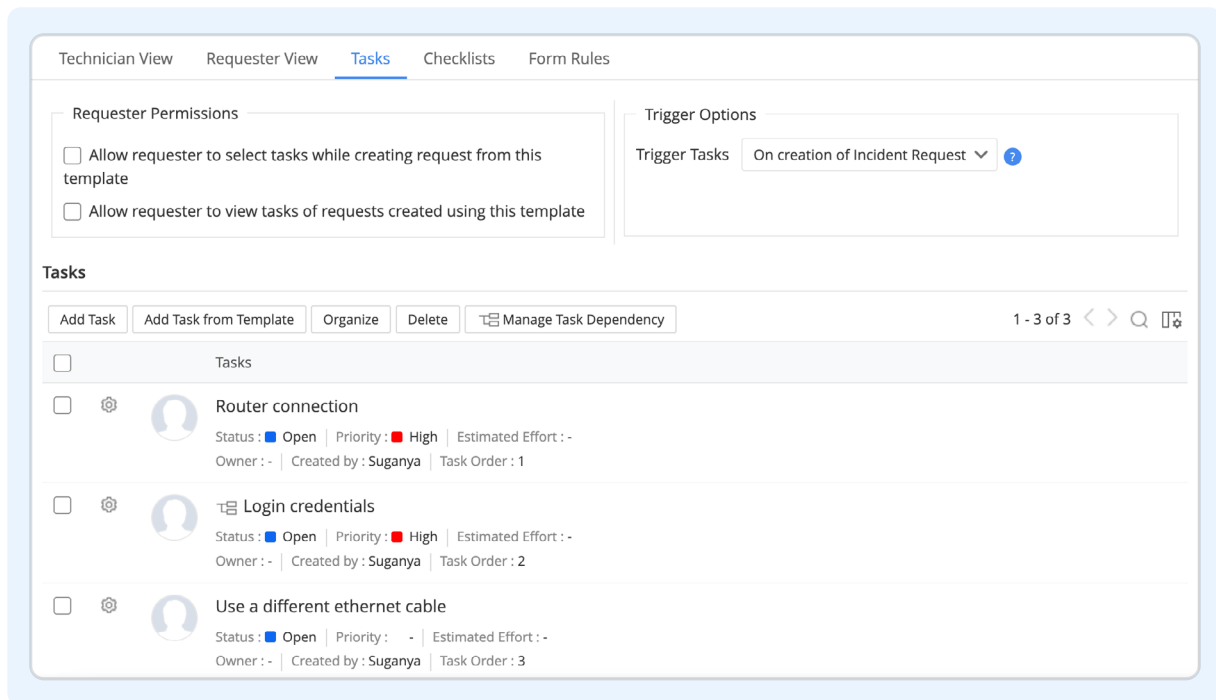


Figure 9: Tasks in ServiceDesk Plus.

- Tasks can also be swiftly added using predefined task templates, which automatically populate details such as the Title, Description, Group, Technician, and Status. Additionally, you have the flexibility to trigger tasks manually, upon request approval, or during request creation.
- You can sequence tasks within a request by utilizing the Manage Task Dependency functionality. This prevents users from closing tasks until all dependent tasks are completed.

Chapter 3:

Fostering a knowledge-centric culture



Fostering a knowledge-driven culture within the service desk is vital for enhancing the efficiency and effectiveness of IT support. A well-organized knowledge base enables faster issue resolution and ensures consistent performance across the team. It also simplifies onboarding and training, helping new support agents become productive more quickly. Retaining key knowledge mitigates the risk of expertise loss when employees leave. Additionally, empowering users with self-service options lightens the team's workload, allowing them to focus on more complex tasks.

a. Speeding up resolutions with a well-curated knowledge base

- ServiceDesk Plus empowers you to create and curate a comprehensive knowledge base (Fig. 10), enriched with solutions, troubleshooting guides, and FAQs.
- You can categorize knowledge base articles under relevant topics and use the filter option to craft customized pages that showcase solutions tailored to specific criteria. To ensure the accuracy and relevance of the information, you can implement approval processes and define expiration dates for the content, thereby guaranteeing that only current and validated resources are accessible.
- Incorporating relevant keywords makes articles more searchable, helping technicians and end-users quickly find the needed information and reducing search time. Articles can be shared with specific technician groups or published on the self-service portal for easy access.
- With a built-in knowledge management system that integrates seamlessly with other ITSM practices like self-service, incident, & problem management, you can add new solutions from incident or problem requests to your knowledge base, or link existing articles to incident and problem requests for quick references.

- Zia guides users to solutions using natural language and offers concise article summaries. With ChatGPT integration, you can search for solutions from both internal and external sources, making your knowledge base smarter and more responsive.

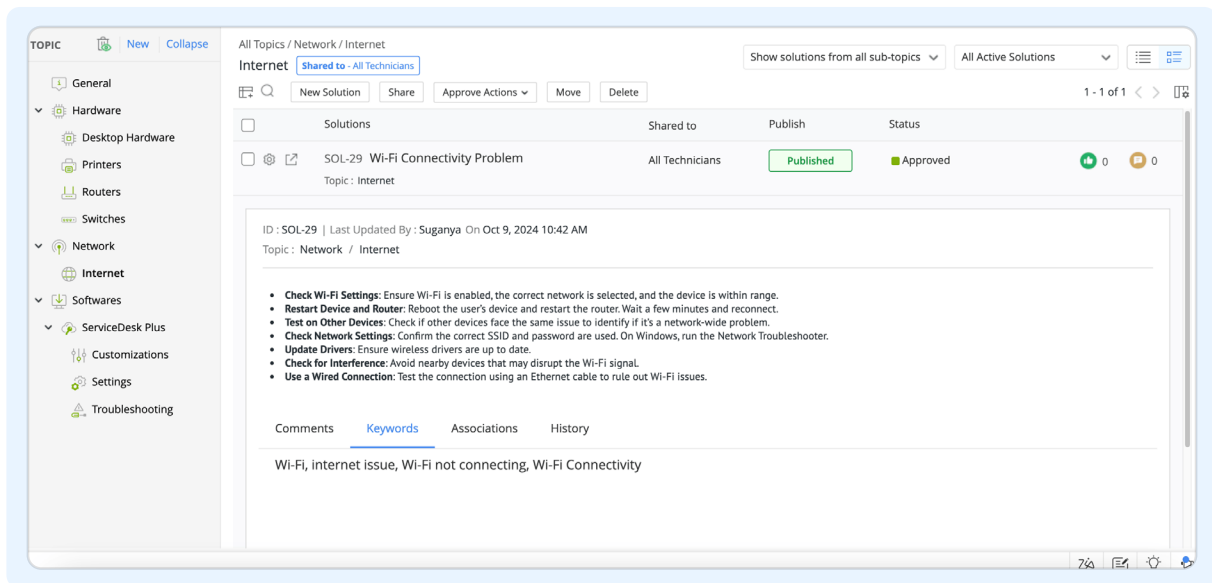


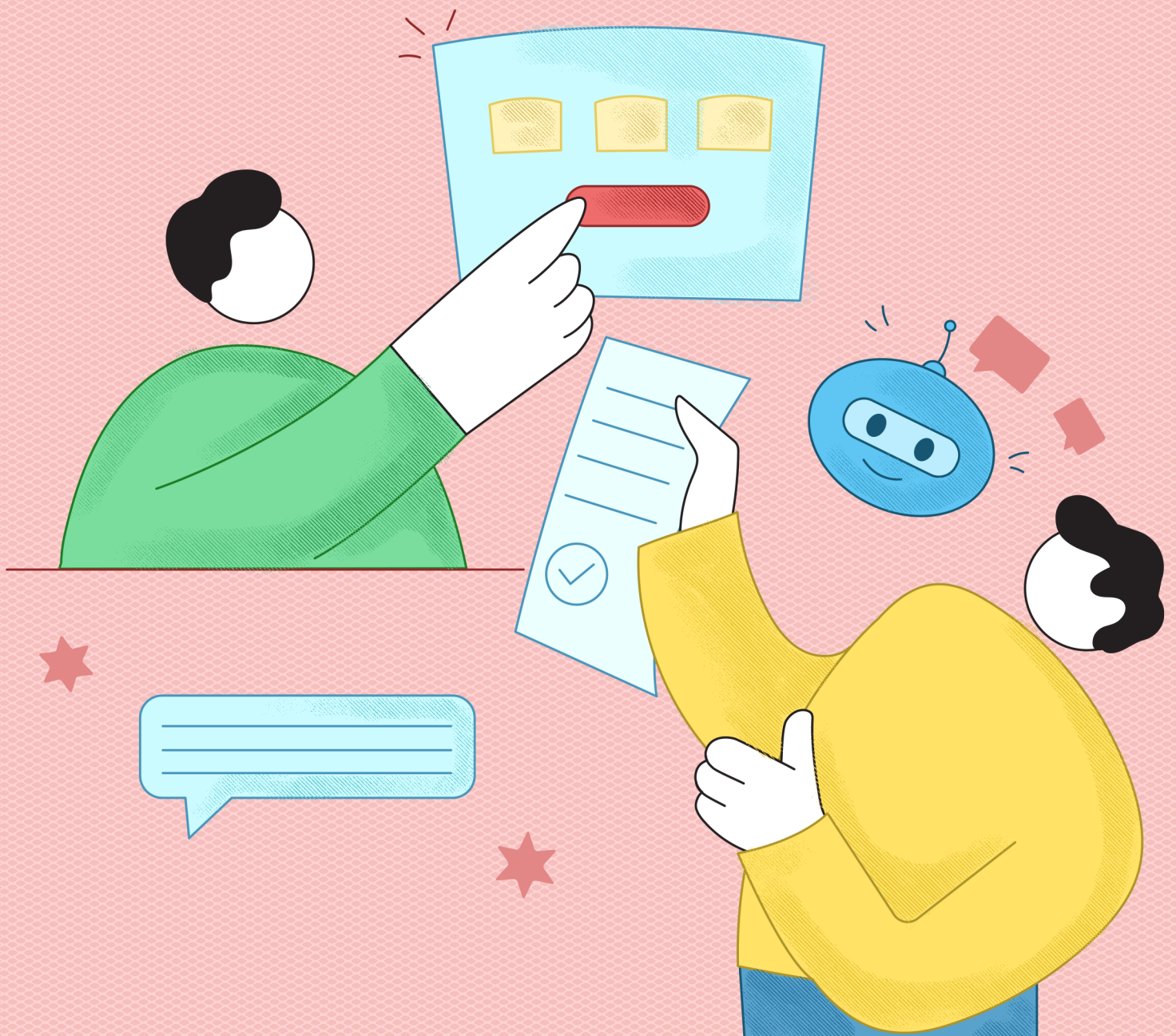
Figure 10: Example of a knowledge base article in ServiceDesk Plus.

b. Empowering users through a self-service knowledge base

- The self-service portal in ServiceDesk Plus empowers end-users to explore the knowledge base for solutions to common issues, significantly reducing the need to submit requests.
- Both end-users and technicians can provide feedback on solutions, marking them as helpful or not, and suggesting improvements. This feedback mechanism ensures that the knowledge base is continuously updated and optimized for accuracy and usefulness.

Chapter 4:

Elevating employee experiences



Managing an IT service desk brings its own set of challenges, especially when balancing user satisfaction, operational efficiency, and ongoing improvement. A key responsibility of a service desk manager is to deliver a smooth experience for end users. Whether they're troubleshooting technical problems, submitting requests, or checking ticket statuses, users expect quick, transparent, and effective communication. While improving their experience can boost satisfaction, this goal becomes harder to achieve as request volumes grow and communication clarity fades. With ServiceDesk Plus, enhancing user experience becomes a manageable endeavor. Let us explore how its features can empower you to elevate user satisfaction.

a. Building and launching a self-service portal for employees

- ServiceDesk Plus comes equipped with an intuitive self-service portal (Fig. 11), ensuring seamless navigation and resource accessibility for all users. You can leverage it to showcase your IT service catalog, allowing users to effortlessly select the services they need, similar to a shopping cart experience.
- You can empower users to submit and track their own requests by providing them with access to relevant solutions in the knowledge base while resolving common issues by themselves. Automated notifications keep end users informed about ticket progress and approvals, fostering efficient communication between users and technicians.
- To streamline operations further, reduce duplicate tickets by making company-wide or user-specific announcements regarding outages and planned maintenance.

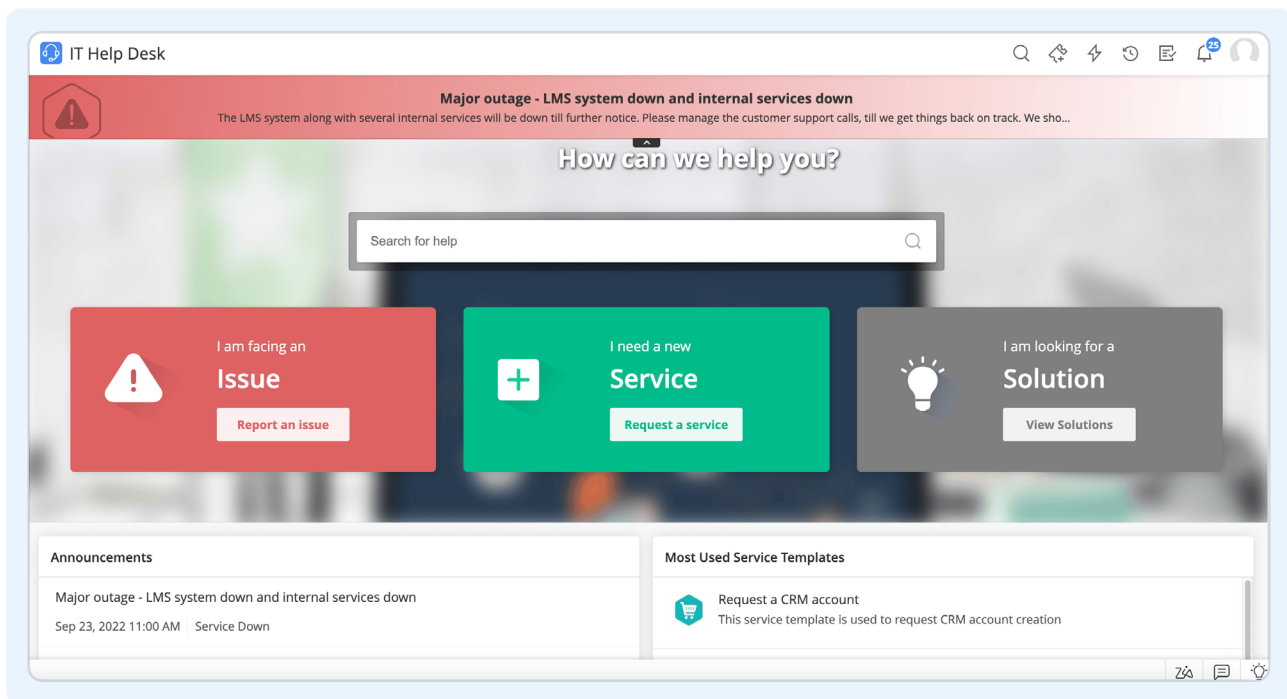


Figure 11: An example of a self-service portal in ServiceDesk Plus.

- Role-based access permissions in the platform ensure that end users have appropriate access to knowledge base articles, ticket templates, service catalog items, and tailored announcements within the self-service portal.
- Widgets provide an easy way for users to access important information and perform key actions. These customizable widgets can show ticket statuses, service catalog options, announcements, and knowledge base articles, helping users quickly find what they need and stay updated. They make it simple to manage requests and access resources, all in one convenient place.

- The self-service portal offers customization options, allowing you to configure its appearance to align with your specific preferences for how users should interact with it. This flexibility enables you to reorganize, add, remove, hide, and resize widgets effortlessly. With URL widgets bringing in information from your intranet or from another website, you can present a personalized self-service experience that is consistent with your organization's branding.
- Beyond IT support, you can extend ServiceDesk Plus' capabilities to departments like HR and facilities management to offer a unified platform (Fig. 12) for consistent service delivery across various organizational functions. This unified approach enhances productivity, streamlines processes, and elevates the overall service experience for employees across every enterprise service touchpoint.

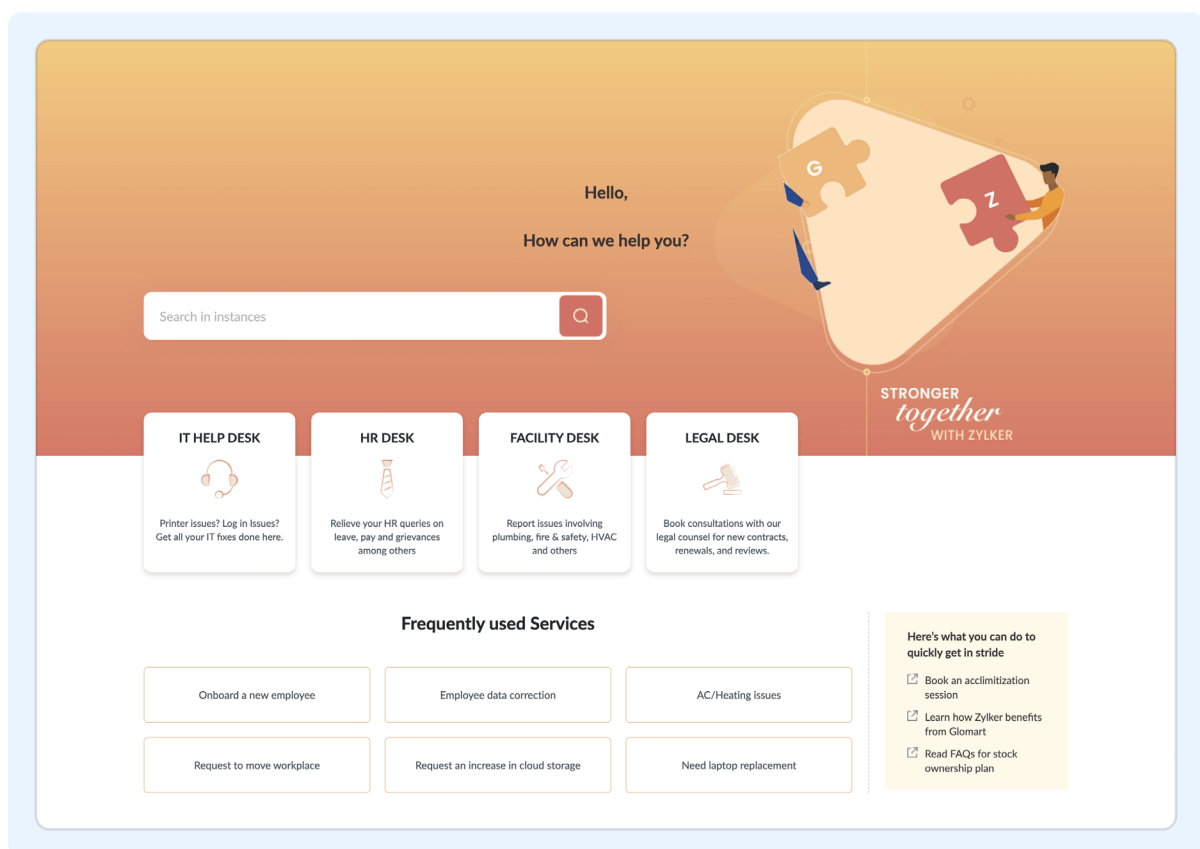


Figure 12. A demonstration of an enterprise portal.

b. Providing on-demand support with a chatbot

- Zia helps end-users resolve issues by themselves or raise a ticket wherever technician intervention is needed.
- Zia's voice chat from the ServiceDesk Plus mobile app allows end users to interact with the service desk through natural voice commands. Instead of navigating through multiple options or typing, users can simply ask Zia to create tickets, check ticket status, or perform other service requests. This hands-free interaction improves accessibility and saves time, particularly in situations where users need to log issues quickly, such as during meetings or on the go
- Zia Actions provide customizable workflows and automation that allow end users to perform specific service tasks directly. Through a chat interface, users can trigger predefined actions like ticket creation, ticket modification, or even approval processes without the need for manual intervention. This reduces response times and streamlines operations, making it easier for users to get the services they need immediately.
- Blended Conversations in Zia (Fig. 13) help you build visual conversation trees that automate responses to end-user queries to accelerate self-service and reduce the ticket workload on your IT service desk.

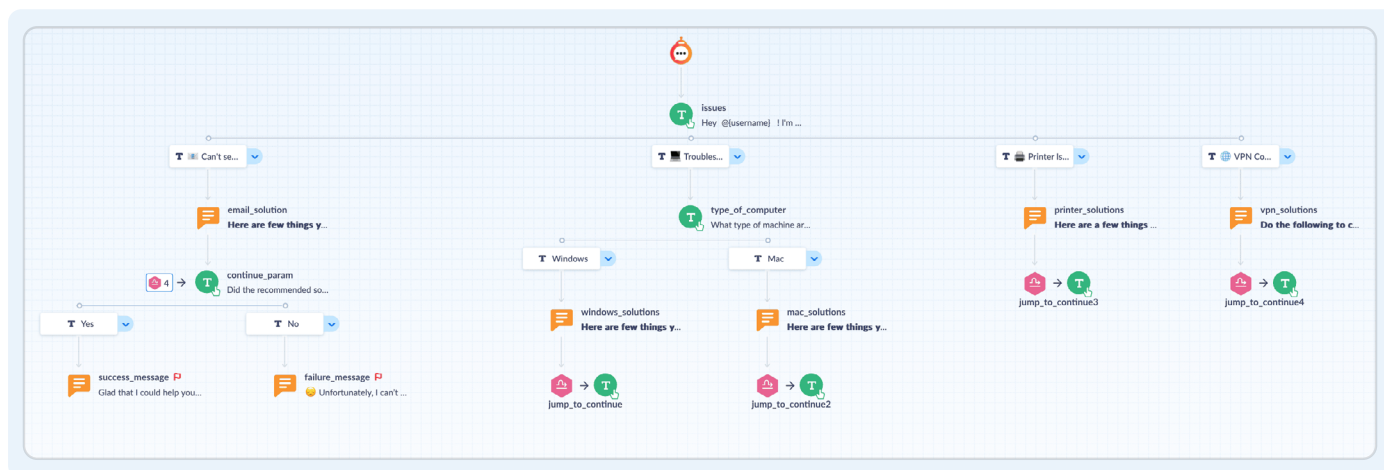


Figure 13: Blended conversations in Zia.

- The Zia chatbot widget can be embedded on your websites or intranet pages, giving end users instant access to help without switching applications. This widget can assist users with common service desk tasks, such as answering queries from the knowledge base or performing basic ticketing operations, all within the same interface. It enhances the self-service capability, providing a seamless user experience across different digital touchpoints. Also, Zia integrates with ChatGPT, enabling end users to lean on GenAI to resolve their IT issues.
- By offering 24/7 support through an intuitive chatbot interface, you can ensure that users get the assistance they need whenever required, further enhancing the user experience.

c. Collecting end-user feedback through advanced custom surveys

- ServiceDesk Plus integrates with Zoho Survey, enabling service desks to set up complex surveys within minutes. You can craft user satisfaction surveys (Fig. 14) by creating unique survey templates, defining automations, building custom logic, and personalizing the surveys for your end users.
- With over 250 ready-made templates and a drag-and-drop builder featuring 25+ question types, you can create tailored surveys effortlessly.
- Surveys can be sent automatically when a ticket is closed, or at other key stages in the service management process, ensuring timely feedback collection. You can also create custom rules based on one or more conditions to trigger surveys and show or hide questions to guide end users based on their responses.

- The Zoho Survey integration offers in-depth reports and analysis on user responses, enabling you to track trends, customer satisfaction, and areas for improvement.
- Through detailed feedback and analysis, the platform enables IT teams to refine their processes, ensuring that service delivery evolves based on real-time user insights.

The screenshot displays the Zoho Survey Builder interface for a survey titled "Employee Onboarding". The interface is divided into three main sections: a left sidebar for "QUESTION TYPES", a central "EDITOR" area, and a right sidebar for "PAGE (1)".

QUESTION TYPES (Left Sidebar):

- Multiple Choice (One Answer)
- Multiple Choice (Many Answers)
- Dropdown (One Answer)
- Dropdown (Many Answers)
- Multiple Choice (One Answer)
- Multiple Choice (Many Answers)
- Dropdown (One Answer)
- Dropdown (Many Answers)
- Image Selection
- Rating Scale
- Star Rating
- NPS
- Slider Scale
- Continuous Sum
- Ranking
- Boolean (Yes/No)

EDITOR (Central Area):

The editor shows the survey content for "Page 1". The title is "Help us support you better!".

Survey Questions:

- * What do you think about our onboarding technician's performance?**
A slider scale from 1 to 10. The scale is labeled "Very poor" at 1, "Average" at 5, and "Excellent" at 10. The current value is 5.
- * What do you think about our onboarding technician's performance?**
A slider scale from 1 to 10. The scale is labeled "Very poor" at 1, "Average" at 5, and "Excellent" at 10. The current value is 6.
- Which aspects of the technician's performance were poor?**
A dropdown menu with the text "--- Select ---".
- How will you rate the quality of services provisioned to the new employee?**
A rating scale from "Very poor" to "Amazing" using 11 smiley face icons. The current value is 6.

Right Sidebar (PAGE (1)):

- PAGE (1)
- P1
- +
- PAGE (1)
- P1
- +

Figure 14: Survey builder.

Chapter 5:

Deploying unique custom automations



As an IT service desk manager, dealing with repetitive tasks, time-sensitive requests, and manual processes can be overwhelming, especially when trying to maintain operational efficiency. While we have already leveraged automation in areas like ticket categorization, prioritization, and assignment, the potential for further automation is vast.

a. Automating announcements for planned downtime or incidents

- Leverage the Announcements functionality (Fig. 15) in ServiceDesk Plus to effectively communicate important information to both technicians and end users.
- Tailor announcements to suit different departments or user groups, allowing for more relevant communication.
- Configure start and end dates, specify the announcement type, set priority levels, identify the services involved, and even include a banner to make the announcement more visible and impactful, ensuring that key information is highlighted for users.

Edit Announcement

Title * A Major Incident has been declared: #2123952 - ERP system reported an issue

Description *

From * Tue, 1 Oct 2024 15:13:10 +05: **To**

Announcement Type Major Incident **Priority** -- Select Priority --

Services Involved -- Select Services Involved --

Email Users -- Select Email Users --

Accessibility ☐ Private ☒ Public ☐ Shared

All users in the organisation can view this announcement

Banner

☒ Display Banner

Custom Style **Banner Preview**

A Major Incident has been declared: #2123952 - ...
Hi All, There was a major incident that broke out, which caused f...

Attachments

Drag and drop files here

Save Cancel

Figure 15: Announcements.

b. Establishing a robust automated communication mechanism for tickets

- Using Notification Rules (Fig. 16) in ServiceDesk Plus, you can set up automated notifications that keep everyone in the loop—whether it's status updates, reminders, or escalation alerts.

- Choose how you want to receive notifications—via email, SMS, or push notifications—tailoring communication to suit your preferences.
- Customize notification templates to align with your requirements, ensuring clarity and consistency in communication.

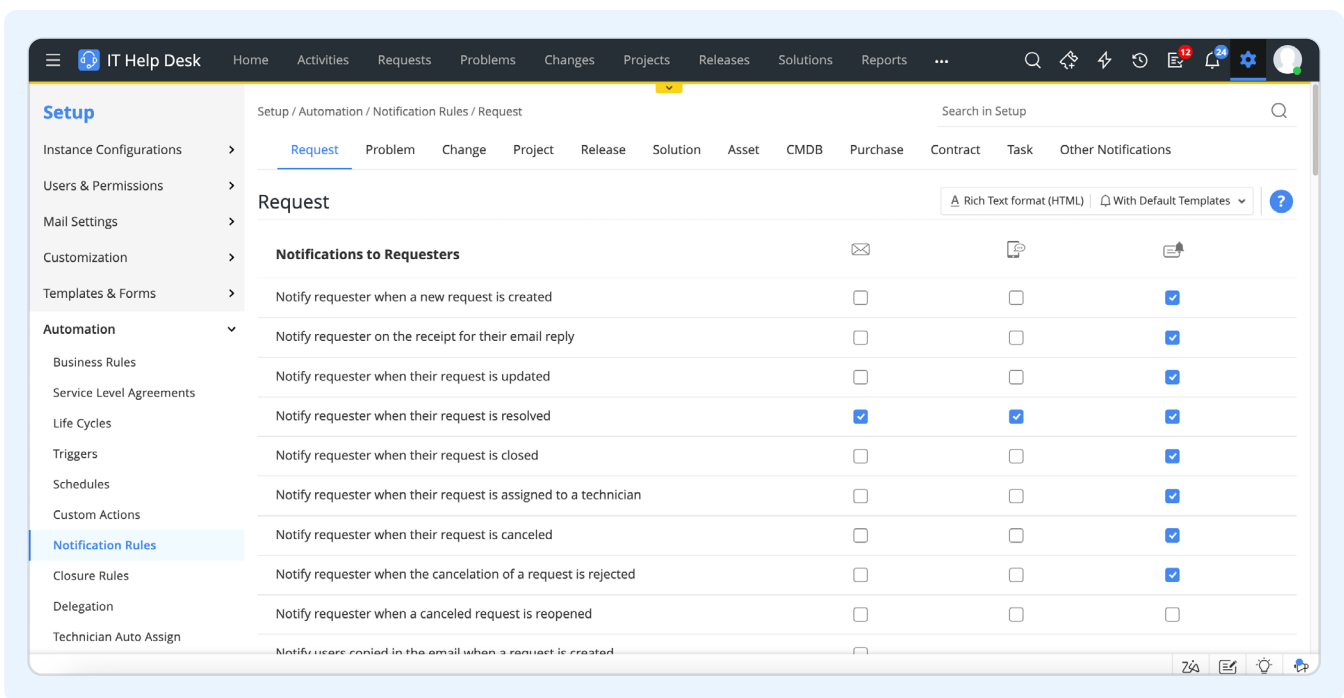


Figure 16: Notifications Rules.

c. Automating the ticket abort process

- Utilize the Business Rules (Fig. 17) in ServiceDesk Plus to automatically abort ticket creation for known issues by establishing specific conditions. This reduces unnecessary ticket volume and minimizes duplicate requests.
- You can customize the abort message to provide clear information to users.

The screenshot displays the 'Edit Incident Business Rule' configuration page in ServiceDesk Plus. The left sidebar shows the navigation menu with 'Automation' and 'Business Rules' highlighted. The main content area is titled 'Edit Incident Business Rule' and includes a search bar and a 'Site' dropdown set to 'Base Site'. The 'Rule Definition' section contains a 'Name' field with the value 'Abort ticket creation' and a 'Description' field with the value 'Abort all tickets that are created for the inability to access organizational services'. Below this, the 'Execute when a request is' section has checkboxes for 'Created' (checked), 'Edited', and 'Deleted'. The 'Execute during' section has radio buttons for 'Any time' (selected), 'Within Operational Hours', and 'Outside Operational Hours'. The 'Turn on cascade execution' checkbox is checked, and the 'Enable Rule' checkbox is also checked. The 'Conditions' section has a dropdown for 'When a request arrives' set to 'Apply conditions based on criteria'. Below this, there are two conditions: 'Template is Unable to access services' and 'OR Subject contains services'. The 'Actions' section has a dropdown for 'When a request arrives' set to 'Abort process execution'. Below this, there is a text box with the value 'We are aware of the issue and are actively working to fix it.' At the bottom right, there are 'Save' and 'Cancel' buttons.

Figure 17: Business Rules to abort ticket creation.

d. Optimizing the process of closing the tickets

- Implementing automated Closure Rules (Fig. 18) in ServiceDesk Plus enables criteria-based ticket closure, such as requiring closure codes, specific fields, user acknowledgment, and task completion. This ensures a consistent and accurate closure process.
- Choose between Manual Closure and Automated Closure options, with the latter ensuring technicians provide resolution details before resolving the request. You can set a specific time for automatically closing the request if no action is taken by the requester.
- Enable Zia request closure to automatically close a request as soon as the requester confirms resolution via email, bypassing the standard closure rules. Status and closure codes will still be recorded in the request history, even with Zia configurations applied.

Setup

Instance Configurations >

Users & Permissions >

Mail Settings >

Customization >

Templates & Forms >

Automation >

Business Rules

Service Level Agreements

Life Cycles

Triggers

Schedules

Custom Actions

Notification Rules

Closure Rules

Delegation

Technician Auto Assign

Asset Auto Assign

Workflows

Conflict Detection

Probes & Discovery >

User Survey >

Data Administration >

General Settings >

Apps & Add-ons >

Developer Space >

Zia >

Zoho Circuit >

Setup / Automation / Closure Rules / Request Closure Rules

Search in Setup

Request Closure Rules

Problem Closure Rules

Change Closure Rules

Release Closure Rules

Purchase Order Closure Rules

Task Closure Rules

Request Closure Rules

Mandatory fields for Closing Request

☐ Mode

☐ Group

☐ Category

☐ Sub Category

☐ Item

☐ Worklog

☐ Impact

☐ Attachments

☐ All child requests should be closed

☐ Access from:

☐ Application Module

☐ Are you experiencing this issue on a specific device?

☐ Choose your designation

☐ Did you try clearing the cache?

☐ Duration of access: From date

☐ Email id

☐ Firewall configurations

☐ How long have you been facing the issue for

☐ HR Portal Web URL

☐ Is it a Major Incident

☐ Is Mobile required?

☐ Is this a requirement for project "Orange"?

☐ Operating system

☐ Select the required resources

☐ to site

☐ When did the incident take place?

☐ Work mode

☐ Level

☐ Technician

☐ Priority

☐ Description

☐ Resolution

☐ Urgency

☐ Request Type

☐ Associated tasks should be closed

☐ All associated checklists should be completed

☐ Access to:

☐ Application that's causing issues

☐ Choose the required resource types

☐ Did you receive

☐ Due by Date

☐ Email

☐ Employee ID

☐ from site

☐ HR Portal Ticket ID

☐ If yes, please specify the device

☐ Is Laptop required

☐ Is the entire department facing this issue?

☐ Mention why you need a replacement

☐ Resource

☐ Software to debug

☐ Web browser

☐ Who were notified?

☐ Work model

Confirm User Acknowledgment

Do you want to prompt a confirmation message to technician asking if user has acknowledged the resolution?

☒ Yes, prompt a message before resolving the request

☐ Mandate closure code

☐ Mandate closure comments

☐ No, don't prompt a message

Request Closing Process

☒ Manual Closure

☐ Automated Closure

Closing Requests Associated with Task and Checklist

Move the request status to

Closed

☒ Only when all associated tasks are completed

☐ Only when all associated checklists are marked 100% complete

Figure 18: Request Closure Rules.

e. Orchestrating IT services with a single touch

- With Zoho Circuit (Fig. 19), our native no-code/low-code platform, you can automate complex workflows by defining and organizing tasks systematically, all with a single action.
- Circuits allow you to execute tasks sequentially, in parallel, or in batches, simplifying complex processes such as onboarding and incident management.
- Workflows can be triggered automatically by specific events, minimizing manual effort and accelerating response times.
- Additionally, circuits seamlessly integrate with existing automations, including incident, service request, and change workflows, further enhancing service desk functionality.
- For tailored solutions, you can also define custom scripts using languages like Python or Java, aligning them with your organization's unique needs.

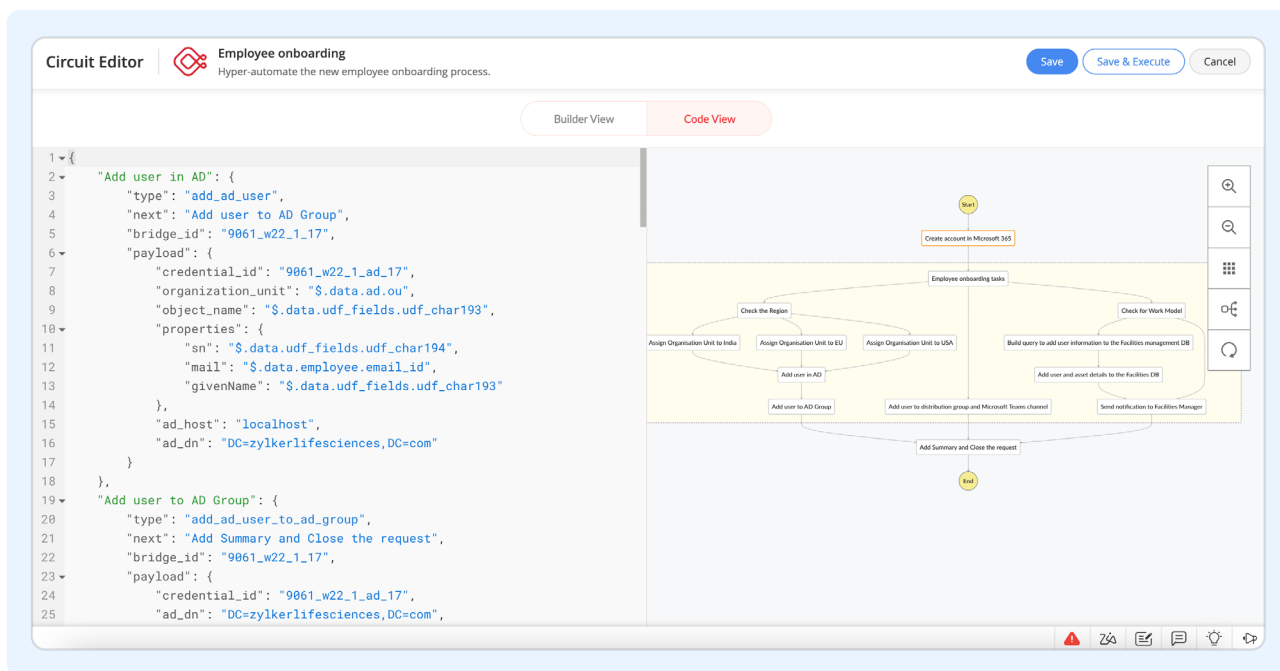


Figure 19: Zoho Circuits.

Chapter 6:

Connecting your IT & business systems on a single platform



When your organization relies on disparate IT systems, IT service delivery processes can quickly become inefficient and cumbersome. It is essential to connect the ITSM platform to your other IT solutions like ITOM tools, identity management solutions, UEM platforms, and more. This way, your service delivery workflows are centrally managed and executed, cutting down time and effort for your service desk technicians.

a. Leveraging native Integrations

ServiceDesk Plus provides several built-in integrations (Fig. 20) that allow seamless interaction with other ManageEngine and Zoho applications.

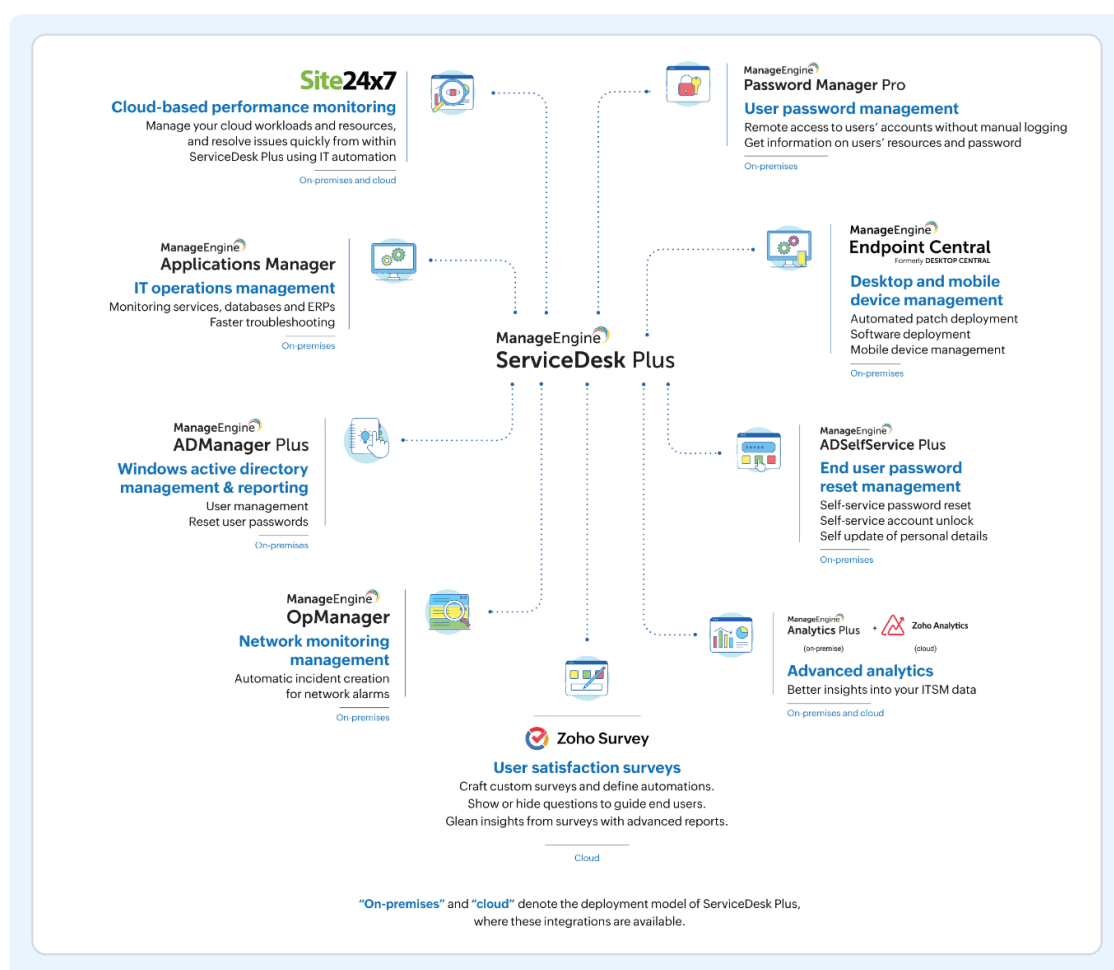


Figure 20: ServiceDesk Plus integration with other ManageEngine & Zoho applications.

- **Endpoint Central:** Provides unified endpoint management, enabling software deployment, patch management, and remote troubleshooting from within ServiceDesk Plus.
- **Applications Manager:** Monitors application performance, linking alerts to service tickets for faster issue resolution and reduced downtime.
- **ADSelfService Plus:** Offers self-service password management, reducing password-related tickets and improving user experience with features like MFA.
- **ADManager Plus:** Simplifies AD management by automating tasks like user provisioning and group management, integrated directly into ServiceDesk Plus.
- **Password Manager Pro:** Provides secure vaulting and sharing of passwords and credentials, improving security and speeding up access during ticket resolution.
- **Analytics Plus:** Delivers advanced reporting and analytics for IT teams to make data-driven decisions, enhancing service quality and performance visibility.
- **OpManager:** Monitors network health, automatically creating tickets for network incidents, allowing for quick resolution and minimized downtime.
- **AlarmsOne:** Consolidates alerts from various IT monitoring systems into a single interface. When integrated with ServiceDesk Plus, it allows IT teams to automate the process of creating and managing tickets based on critical alerts, ensuring that incidents are handled promptly and efficiently.

- **Mobile Device Manager Plus:** Manages mobile devices like smartphones and tablets from within ServiceDesk Plus. This integration provides remote control, security enforcement, and app management for mobile devices, ensuring that IT policies are adhered to across both corporate and BYOD environments.
- **PAM360:** Enhances security by providing centralized management of privileged accounts and passwords. The integration with ServiceDesk Plus enables IT teams to secure, control, and audit access to critical IT systems, ensuring that only authorized personnel can access sensitive resources while working on service tickets.
- **Site24x7:** Provides full-stack IT monitoring and integrates with ServiceDesk Plus to automate ticket creation based on performance alerts.
- **Zoho Survey:** Collects user feedback post-ticket resolution, helping IT teams improve service quality by acting on real-time user insights.

b. Implementing business Integrations:

ServiceDesk Plus provides seamless integrations that connect ITSM with your organization's business processes or third party applications (Fig. 21), creating a unified service experience. With connections to leading applications and REST APIs, you can easily extend ITSM capabilities across various platforms.

- **Microsoft Teams:** Allows users to create requests and check ticket statuses directly within the Teams interface. It enhances collaboration by keeping IT support accessible within a widely used communication tool, improving user satisfaction and operational efficiency.
- **Microsoft Intune:** Automatically enrolls devices into ServiceDesk Plus for tracking and management. This provides a comprehensive view of all devices within the organization, enabling better oversight and control over IT assets.

- **Microsoft Outlook and Office 365:** Integrates the IT service desk into your Outlook or Office 365 mailbox. End users can submit requests and check ticket statuses directly from their mailbox without needing to access the service desk portal. IT teams can access Office 365 apps like OneDrive and SharePoint from within ServiceDesk Plus, allowing for easy document sharing and project management.
- **JIRA:** Lets you push any request created in ServiceDesk Plus as an issue in JIRA with a preferred issue type.
- **REST API:** Enables organizations to customize and extend its functionality. With REST APIs, IT teams can integrate ServiceDesk Plus with other applications, automate workflows, and pull data from external systems. This flexibility enables businesses to tailor their ITSM solutions to meet specific operational needs.

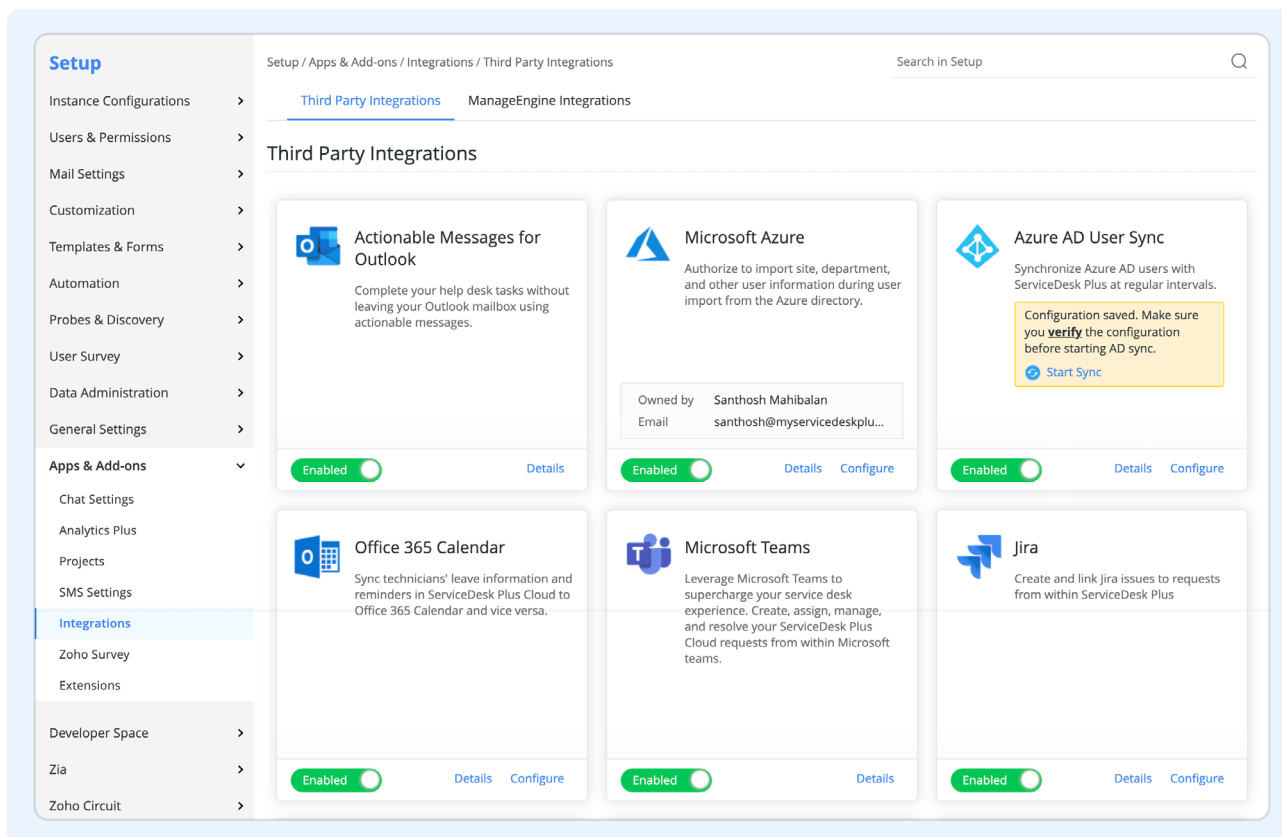
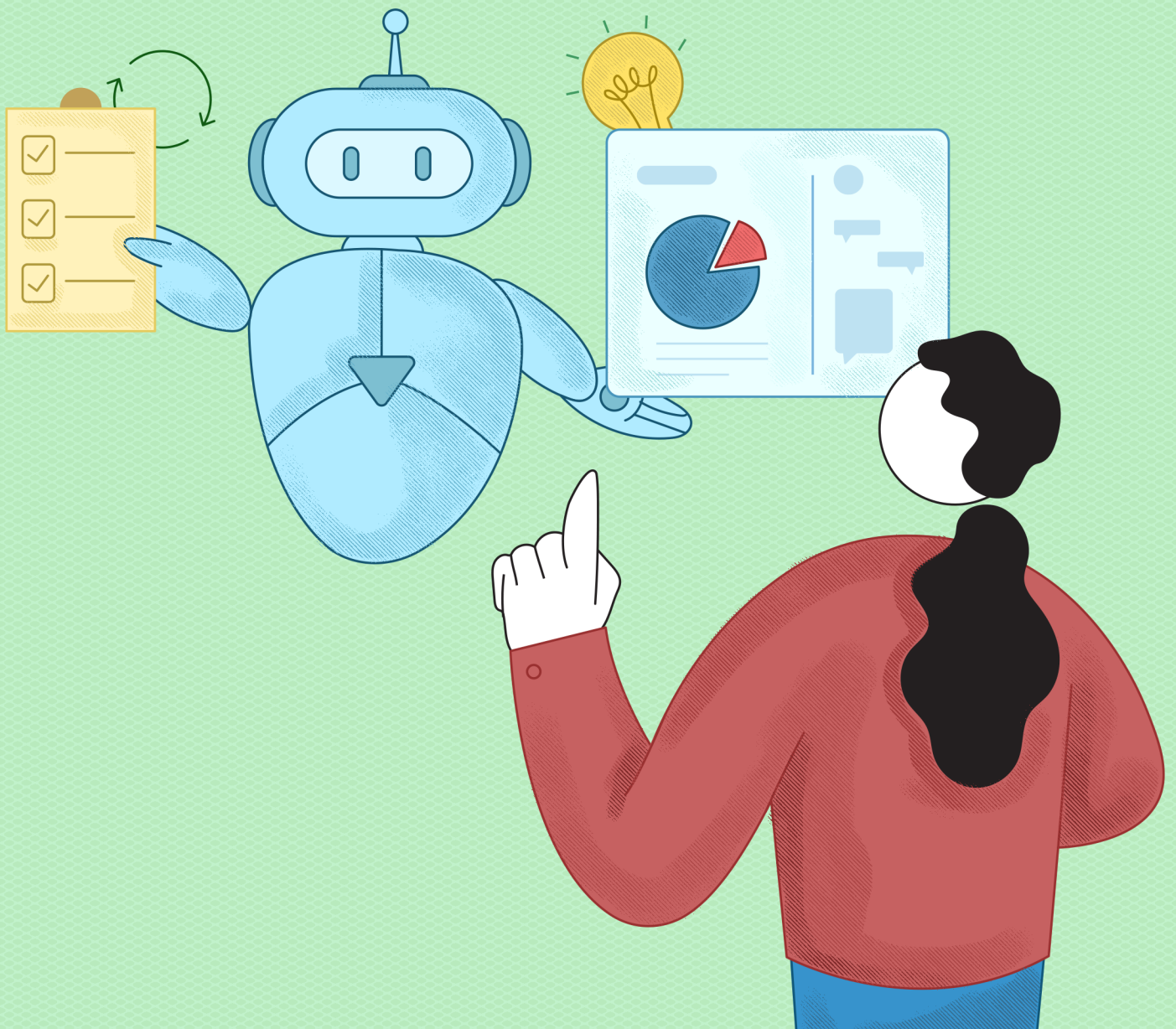


Figure 21: ServiceDesk Plus - Third Party Integrations.

Chapter 7:

Driving efficiency through AI capabilities



AI capabilities are revolutionizing the operations of IT service desks by significantly enhancing efficiency and productivity. By automating routine tasks and delivering intelligent insights, AI enables service desk teams to concentrate on more complex and strategic challenges, thereby streamlining workflows and reducing response times. Here are several ways Zia in ServiceDesk Plus can assist service desk managers in their daily tasks:

- **Predictive insights:** Zia analyzes historical service desk data to predict ticket categories, priorities, and routes tickets to the appropriate technician automatically, reducing manual triaging efforts.
- **Conversational self-service:** Zia functions as a virtual agent, providing end users with instant, conversational support. It can handle simple tasks like resolving low-level issues autonomously, reducing the burden on service desk staff.
- **GenAI-powered ITSM:** Zia integrates with OpenAI's ChatGPT & Microsoft Copilot unlocking different ways to achieve service desk productivity. Technicians can now draft and refine replies, summarize tickets within Microsoft Teams, generate low-code Custom Functions, or run ticket management from within Microsoft Copilot.
- **Customizable Zia actions:** Using a low-code platform, Zia allows businesses to create custom workflows and automate complex processes. This enables Zia to execute more advanced actions, such as triggering external applications or workflows.

Chapter 8:

Complimenting ITSM with ITAM



As an IT service desk manager, it is beneficial to know about organizing and managing business-critical configuration items (CIs) for maintaining a stable and responsive IT environment. By integrating ITAM, you can gain better visibility into hardware and software assets, allowing you to make informed decisions during troubleshooting and incident resolution. Here's how you can leverage ITAM and configuration management database (CMDB) in ServiceDesk Plus to enhance your ITSM strategy.

- You can categorize business-critical CIs from your ITAM database into appropriate types—such as servers, workstations, departments, and individuals. This structured categorization provides your technicians with comprehensive visibility into all accumulated IT assets and services, centralizing the information for more effective management.
- Leverage relationship mapping to link CIs logically, identifying interdependencies between them. This helps your team quickly assess the potential impact of outages or service downtime of a CI on related business services, ensuring proactive risk mitigation and faster resolution times.
- By creating business views (Fig.22), you can visualize how different CIs interact within the larger IT infrastructure. These views offer a centralized platform for monitoring trends and analyzing service-related data such as associated incidents, change requests, and problems, ensuring that your team has the full context necessary to make informed decisions quickly.

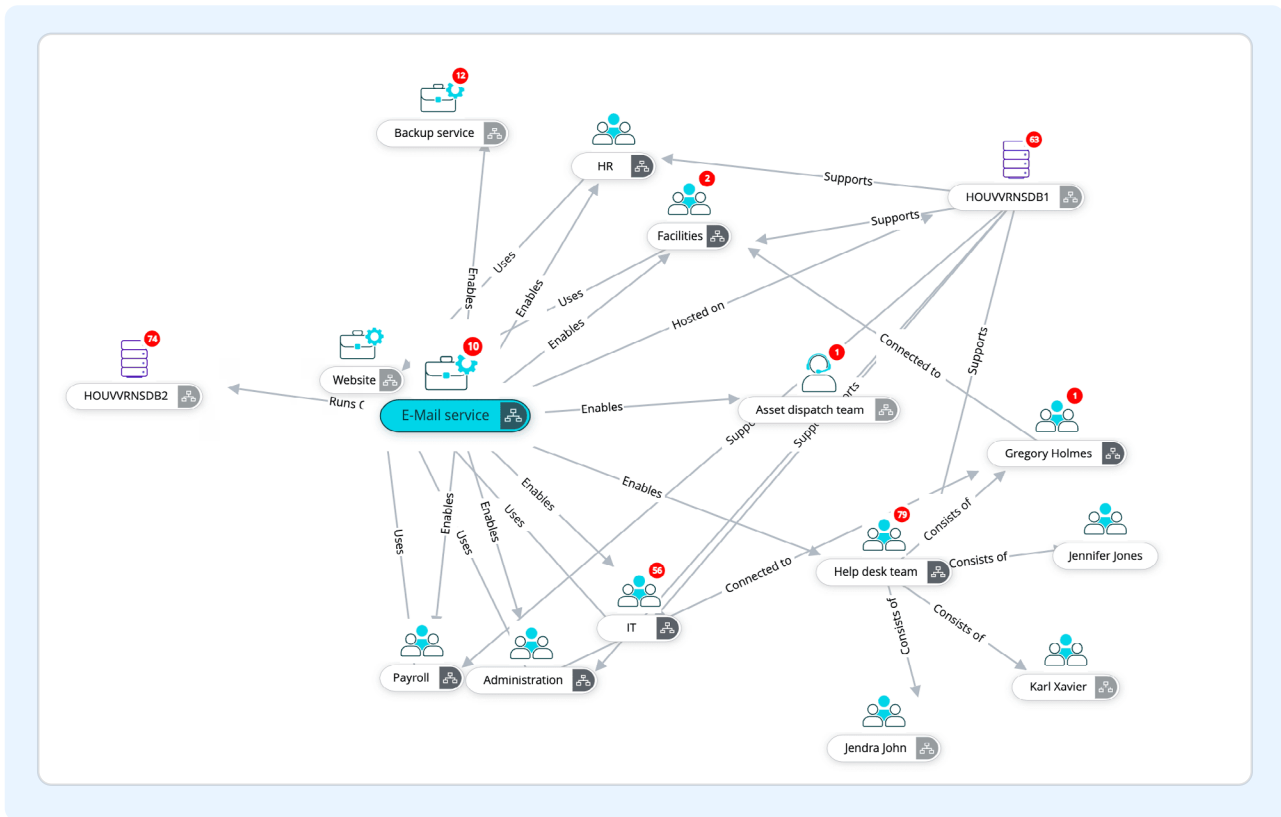


Figure 22: Business Views in CMDB.

- CMDB helps you track CI relationships across your infrastructure, making it easier to assess the ripple effects of incidents. For instance, when an incident arises, you can isolate impacted systems, understand how they relate to other CIs, and make decisions that minimize the disruption.
- The CMDB integrated with other ITSM processes, enhance the overall context around incidents, changes, and service requests. This integration promotes a more responsive IT environment by reducing downtime, enabling quicker incident responses, and improving overall service quality.

Chapter 9:

Driving decisions with granular insights



As an IT service desk manager, your decisions can impact the entire organization. Whether it's optimizing team performance, predicting workload spikes, or justifying budget requests, having accurate, real-time data at your fingertips is essential. The days of relying on gut feelings are long gone—what you need is hard data to guide your choices.

ServiceDesk Plus makes this easier by offering powerful reporting and analytics features to help you make smarter, faster decisions. Here's how these tools make decision-making a breeze:

a. Demonstrating the value of IT service desk with insightful reports

- **Prebuilt reports:** Save time with prebuilt reports that cover common metrics like ticket resolution times, incident trends, and SLA breaches.
- **Custom reports:** Create custom reports that dig into any aspect of your operations, whether it's ticket escalations or technician performance.
- **Scheduled reporting:** Set up automated reports that are delivered to your inbox or your stakeholders on a recurring schedule, ensuring everyone stays updated.

b. Providing a quick overview of ITSM operations with custom dashboards

With ServiceDesk Plus, you gain access to intuitive, customizable dashboards that offer insights into KPIs.

- **Real-time analytics:** Track metrics like ticket volume, response times, SLA compliance, and team performance in real time.

- **Customizable widgets:** Create and customize your dashboards to reflect the data most critical to your operations, whether monitoring new incidents, tracking open tickets, addressing overdue tasks, or assessing support agent workload. With the advanced visualization tools, such as charts and graphs, you can gain deep insights into trends over time—ranging from major incident trends and SLA breaches to monthly resolution times and the recurrence of reopened incidents.

Leveraging the SmartView feature (Fig. 23) in ServiceDesk Plus elevates request management by offering a customizable, widget-based interface that consolidates essential information in one streamlined view. This intuitive format allows for seamless execution of key actions, such as responding to tickets, adding notes, and updating statuses, without navigating away from the current screen. Designed to optimize efficiency, SmartView enhances productivity and user experience by minimizing workflow interruptions and providing a unified workspace tailored to your needs.

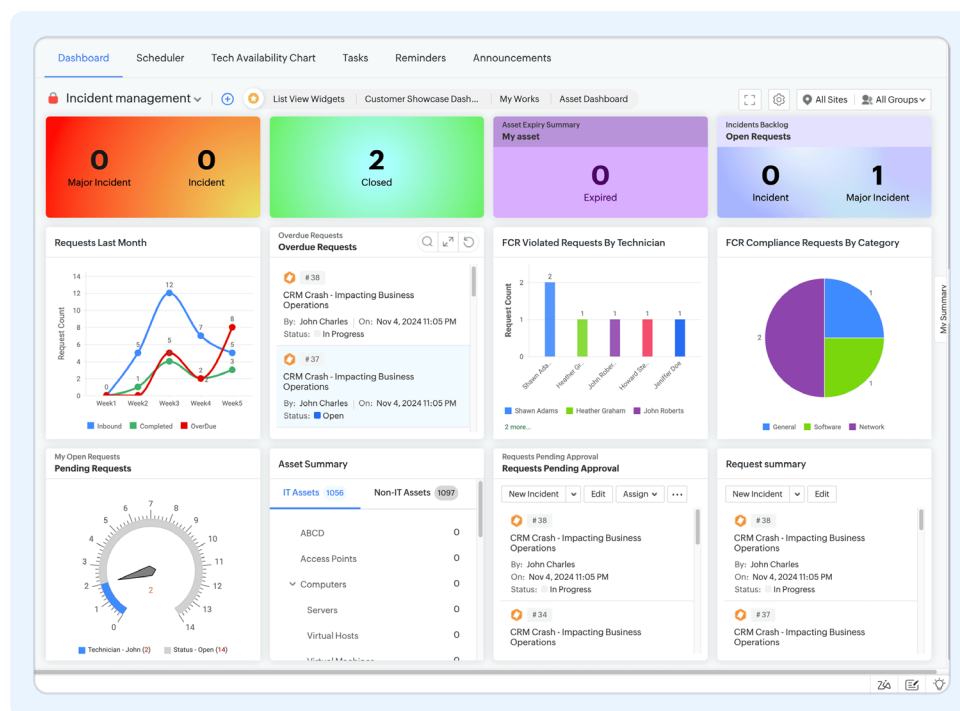


Figure 23: Customizable dashboard in ServiceDesk Plus.

Conclusion

Ensuring your IT service desk operates at peak efficiency while safeguarding your technicians from burnout is a complex, yet crucial, challenge. This is where a unified, value-driven service management platform becomes indispensable. It should strike a balance—easy to customize, cost-effective to implement and maintain, while offering comprehensive and robust ITSM workflow automation capabilities.

ManageEngine ServiceDesk Plus embodies this ideal and goes beyond. It is a strategic partner in your IT service journey, empowering you with automation, advanced workflows, seamless integrations, and actionable insights. By leveraging these tools, you can focus on what truly matters: fostering a high-performing IT team that consistently delivers superior service. From optimizing routine operations to boosting productivity and enhancing user experiences, ServiceDesk Plus offers the features you need to excel.

Discover how it can streamline your operations, enhance efficiency, and elevate your service desk management through a hands-on [free trial](#). Experience firsthand how ServiceDesk Plus can be the cornerstone of your IT success!

About ServiceDesk Plus

ServiceDesk Plus is the unified service management platform from ManageEngine, the enterprise IT management division of Zoho Corporation. Built on industry-recommended ITSM best practices, ServiceDesk Plus comes packed with contextual IT and business integrations that help service desk teams better align with their organization's business objectives. With native enterprise service management capabilities and unrestricted extensibility offered through low-code scripting, ServiceDesk Plus helps organizations design, deliver and support their business and IT services. It comes in three editions and is available in 37 different languages. To learn more about ServiceDesk Plus and its features, please visit manageengine.com/service-desk.

About the author

With eight years' experience in IT services, Suganya has hands-on experience handling key IT service management (ITSM) practices. As an avid ITSM evangelist, she is also a ServiceDesk Plus product expert. She creates best-practice articles and blogs that can help ITSM practitioners address their everyday challenges with ServiceDesk Plus, the flagship IT and enterprise service management platform from ManageEngine. Besides her passion for writing, she also enjoys trekking, reading books, playing basketball, and stargazing with her daughter.