ManageEngine ServiceDesk Plus

Admin Guide

ManageEngine ServiceDesk plus

Helpdesk and Asset management Software

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Introduction

ManageEngine ServiceDesk Plus is a comprehensive help desk and asset management software that provides help desk agents and IT managers an integrated console to monitor and maintain the assets and IT requests generated from the users of the IT resources in an organization. The IT help desk plays an important part in the provision of IT Services. It is very often the first contact the users have in their use of IT Services when something does not work as expected. The IT help desk is a single point of contact for end-users who need help. Without this, an organization could certainly face losses due to inefficiencies.

The two main focuses of the ManageEngine ServiceDesk Plus are IT Request tracking and Asset Management. Using the following modules of ServiceDesk, technicians and system administrators can resolve issues of complex nature in no time and thus reduce the end-user frustration arising due to time consuming issue resolving process. They can also keep track of the needs of the organization with the help of asset management and proactively allocate resources to the right user/departments, thus increasing the productivity of the organization.

- Requests
- Solutions
- Inventory
- Purchase
- Contract

The request module functions as the Help Desk where requests are fetched and necessary solutions provided by assigning technicians to resolve issues reported.

When you log in to ManageEngine ServiceDesk Plus, the application displays the ServiceDesk Plus home page that contains information on pending requests, overdue requests, requests assigned to the user who has logged in, individual user's task list, and depending on the user login, the other dash board views such as Contract and Purchase Order summary also may be displayed.

Requests: Clicking on the Requests tab on the header pane takes you to the request module. This serves as the IT help desk module where the IT requests from individual users are fetched, tracked, technicians are assigned, and a solution is provided.

Solutions: This module serves as a knowledge base for your IT help desk team as well as your users. Users can search this for solutions for issues and solve them themselves. Also when technicians resolve issues, they can directly convert these resolutions as knowledge base articles. To view the solutions, click the Solutions tab in the header pane.

Inventory: Clicking on the Inventory tab on the header pane opens the inventory module. This enables you to track and maintain the IT inventory, such as computer systems, mouse, keyboards, printers, scanners, and so on. It also enables you to view if the assets are associated to a particular workstation and user or if they are free to be allocated with a new user or workstation. Also, you can keep track of the software resources associated to each workstation and thus plan accordingly for the licenses that need to be purchased or surrendered.

Purchase: Here you can create new purchase orders and track them till the order has been delivered. The same details can also be maintained for future reference. Clicking the Purchase tab takes you to the Purchase module.

Contract: This module holds the details regarding the maintenance contracts between your organization and the vendor(s) from whom the assets of your organization have been purchased. Clicking the Contracts tab in the header pane takes you to the contract module.

In addition to these, ServiceDesk Plus has GUI-rich reports for requests and inventory modules. There are predefined sets of reports that help you evaluate the efficiency and productivity of your IT help desk team, the load of requests handled by the team, the inventory distribution, and many more. Also, the ServiceDesk administrator can configure various helpdesk, asset, and enterprise-related settings, such as the working hours of the organization, service-level agreements, user roles, departments and many more.

Based on the permissions provided by the ServiceDesk Plus administrator to each of the users of the application, you will be able to access the above modules. If you do not have the access permission, contact your ServiceDesk Plus administrator.

System Requirements

Hardware

CPU	Pentium III 800 MHz or above
RAM	512 MB or above
Disk Space	200 MB
Display	High Color

Operating System

- Windows 2000 + SP4
- Windows 2000 / 2003 Server
- Windows XP Professional
- Red Hat Linux 7.2 and above
- Linux Debian 3.0

Installation and Getting Started

- In Windows
- In Linux

In Windows

Follow the steps given below to install and set up the ManageEngine ServiceDesk Plus application:

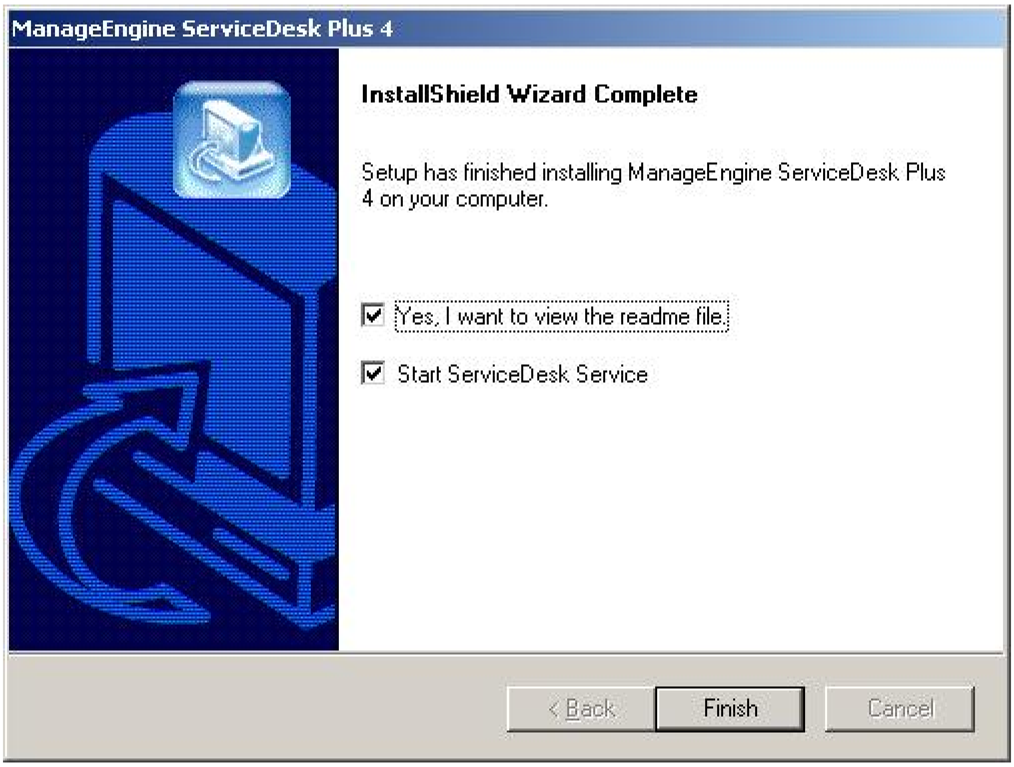
1. Download the **AdventNet_ManageEngine_ServiceDesk_Plus_4_Windows.exe** file.
2. Click the exe file to start the installation. The ServiceDesk Plus installation wizard appears. Follow the instructions given in the wizard to successfully set up ServiceDesk Plus.
3. On accepting the license agreement, the installation wizard provides you with an option to choose between Trial Edition and Free Edition of the ServiceDesk Plus application. Free Edition never expires but is restricted to a single technician login and 25 nodes (workstation) discovery. The Trial Edition is valid only for 30 days and provides two technician login. There are no other restrictions.
4. The next step is choosing the installation directory. By default, the application is installed in *C:\AdventNet\ME\ServiceDesk* directory. If you want to change the installation directory, then, click the **Browse** button beside the directory path.

> **Note:** The installation directory or its parent directories must not have any space character in its name.

5. From the file chooser window, choose the directory of your choice and click **Next**.
6. Provide a name that needs to appear in the Programs folder. By default, it is **ManageEngine ServiceDesk Plus 4**.
7. Click **Next**.
8. Enter the port number that has to be used to run the web server. The default port number provided is **8080**. If you already have any application running in that port, then enter the number of the port that is free and can be used by the web server to run the ServiceDesk Plus application server and click **Next**.
9. The details that you have provided till now will be displayed as below for your confirmation:
   Installation Directory : C:\AdventNet\ME\ServiceDesk
   Folder Name : ManageEngine ServiceDesk Plus 4
   WebServer Port : 8080

   If the displayed information is correct, then click the **Next** button, or else click the **Back** button and make the necessary changes and proceed with the installation.

10. After you confirm the above details, the application is installed. On successful installation, the following screen is displayed.



When you choose to start the ServiceDesk Service, the ServiceDesk Server is started automatically and the client window opens. If you do not wish to view the readme file or start ServiceDesk as a windows service, deselect the options provided.

11. Click **Finish** to complete the installation.

If you had followed the instructions in the wizard and installed the application with the default settings suggested by the wizard, the **ManageEngine ServiceDesk Plus** program group is created in the **Start** menu. Also, the ServiceDesk server will be started and the client window opens with the login page. Enter the user name and password to log in to the application.

To manually start the ServiceDesk Plus application

1. Click **Start -> Programs -> ManageEngine ServiceDesk Plus 4 -> ServiceDesk Server** to start the web server. This takes approximately 2 minutes in a Windows XP, 512 MB RAM, and 1.0 GHZ processor. Generally, the server is started and the web client is also launched in the default browser.
2. If the web client is not launched automatically, then click **Start -> Programs -> ManageEngine ServiceDesk Plus 4 -> ServiceDesk Web Client** to start the web client. The application opens the login page in your default web browser.
3. Enter your **user name** "admin" and **password** "admin" to log in to ServiceDesk Plus. As soon as you log in the **configuration wizard** home page is displayed. Follow the instructions provided in the wizard and click the **Next** button.

To configure your application settings, refer to the Configurations section.

To shut down the ServiceDesk Plus application

1. Click **Start -> Programs -> ManageEngine ServiceDesk Plus 4 -> Shutdown ServiceDesk**. A confirmation message is displayed.
2. Click **OK** to proceed with the shut down.

Alternatively, you can also right-click on the system tray icon and choose **Shut down Server**. A confirmation message is displayed; click OK to shut down ServiceDesk Plus.

To reinitialize the server

1. Go to *<ServiceDesk>\bin* directory.
2. Execute **reinitializeDB.bat** to reinitialize the server. ***Please note that all the data in the server will be lost when you reinitialize.***

In Linux

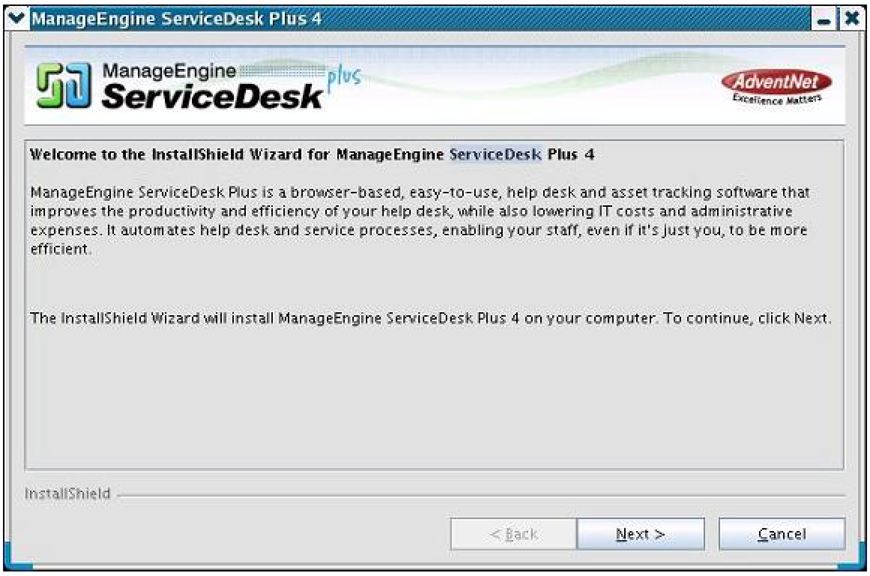
Follow the steps given below to install and setup the ManageEngine ServiceDesk Plus application:

1. Download the **AdventNet_ManageEngine_ServiceDesk_Plus_4_Linux.bin** file.
2. Execute the .bin as given below, at your command prompt:

   ./AdventNet_ManageEngine_ServiceDesk_Plus_4_Linux.bin

	Note: You need to have execute permissions for executing the .bin type files.

3. The following screen of the installation wizard is opened and the you will be guided through the installation process.



4. Click **Next** and follow the steps given in the installation wizard.
5. The second screen displays the License Agreement. You need to accept the license agreement to proceed with the installation. So select the radio button accepting the license agreement and click **Next**.

6. On accepting the license agreement, the installation wizard provides you with an option to choose between Trial Edition and Free Edition of the ServiceDesk Plus application. Free Edition never expires but is restricted to a single technician login and 25 nodes (workstation) discovery. The Trial Edition is valid only for 30 days and provides two technician login. There are no other restrictions. Choose the appropriate edition for your need and click **Next**.
7. The next step is choosing the installation directory. By default, the application is installed in *home/<user>/AdventNet/ME/ServiceDesk* directory. If you want to change the installation directory, then, click the **Browse** button beside the directory path.
8. From the file chooser window, choose the directory of your choice and click **Next**.
9. Enter the port number that has to be used to run the web server. The default port number provided is **8080**. If you already have any application running in that port, then enter the number of the port that is free and can be used by the web server to run the ServiceDesk Plus application server and click **Next**.

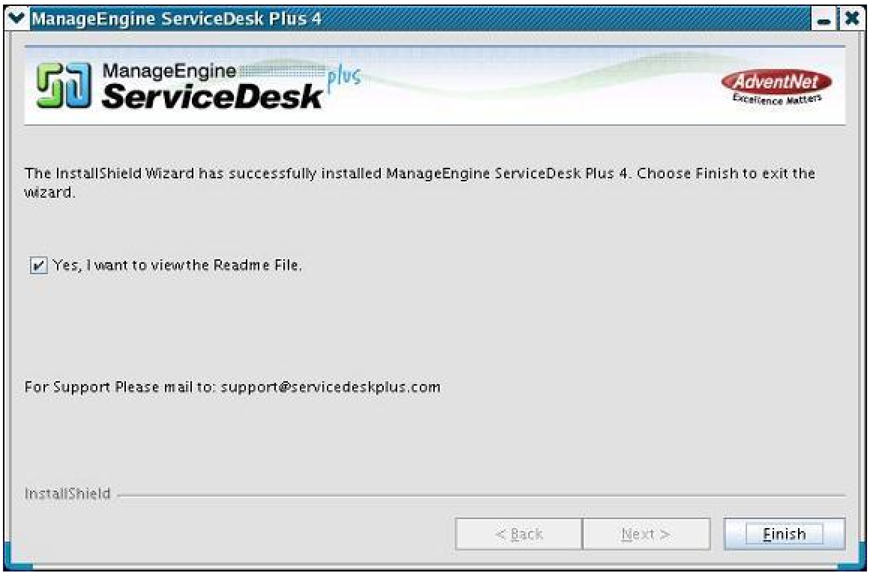
Note: If you wish to provide a port number lesser than 1024 as the web server port, then you need to be the super-user of the system to successfully install and run ServiceDesk Plus application.

10. The details that you have provided till now will be displayed as below for your confirmation:

    <u>Details of Installation</u>
    Installation Directory: home/<user>/AdventNet/ME/ServiceDesk
    Product Size : 62.8 MB.

    If the displayed information is correct, then click the **Next** button, or else click the **Back** button and make the necessary changes and proceed with the installation.

11. After you confirm the above details, the application is installed. On successful installation, the following screen is displayed.



If you do not wish to view the Readme file, deselect the check box.

12. Click **Finish** to complete the installation.

To manually start the ServiceDesk Plus application

1. Go to the <ServiceDesk Plus>/bin directory and execute the run.sh file as given below:

   $ sh run.sh

2. To start the web client, open a web browser and type the following in the address field:

   http://localhost:8080

   Here, you need to replace the localhost with the corresponding server name where the ServiceDesk Plus web server is running and the port number 8080 should be replaced with the actual port where the server is running. The application opens the login page in your default web browser.

3. Enter your **user name** "admin" and **password** "admin" to log in to ServiceDesk Plus. As soon as you login the **configuration wizard** home page is displayed. Follow the instructions provided in the wizard and click the **Next** button.

To configure your application settings, refer to the Configurations section.

To shutdown the ServiceDesk Plus application, execute **shutdown.sh** file from the **bin** directory as below:

```
sh shutdown.sh -S
```

To reinitialize the server

1. Go to *<ServiceDesk Plus>/bin* directory.
2. Execute **reinitializeDB.sh** to reinitialize the server. ***Please note that all the data in the server will be lost when you reinitialize.***

Uninstalling ServiceDesk Plus

- In Windows
- In Linux

In Windows

To uninstall ServiceDesk Plus from Windows

1. Click **Start -> Programs -> ManageEngine ServiceDesk Plus 4 -> Uninstall ServiceDesk**.

In Linux

To uninstall ServiceDesk Plus from Linux

1. Go to *<ServiceDesk>/_uninst* directory.
2. Execute uninstaller.bin as below:

   $ ./uninstaller.bin

Registering ServiceDesk Plus

Once your trial evaluation period is over, you need to register the ServiceDesk Plus application. To purchase the application, please contact sales@adventnet.com. They will send you the registered license file. Using this license file, you can register the ServiceDesk Plus application.

To register ServiceDesk Plus

1. Log in to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **License** link available at the right top of the application. The **License** window is opened.
3. Click the **Browse** button to locate the license file sent to you when you purchased the application.
4. From the file chooser window, select the license file and click **Open**.
5. Click **Upgrade**.

The registration of the ServiceDesk Plus application is complete. You can continue using the application.

Contacting AdventNet

- AdventNet Headquarters
- Sales
- Technical Support

AdventNet Headquarters

Web site	www.adventnet.com
AdventNet Headquarters	AdventNet, Inc. 5645 Gibraltar Drive Pleasanton, CA 94588 USA Phone: +1-925-924-9500 Fax : +1-925-924-9600 E-mail: info@adventnet.com
AdventNet Development Center	AdventNet Development Centre (I) Private Limited 11 Sarathy Nagar, Vijayanagar, Velachery, Chennai 600 042 INDIA Phone: +91-44-22431115 (10 lines) Fax: +91-44-22435327 E-mail: info@adventnet.com

Sales

For purchasing ManageEngine ServiceDesk Plus from any part of the world, fill out the Sales Request Form. A sales person will contact you shortly. You can also send us e-mail at sales@adventnet.com.

You can also call the AdventNet headquarters at the following numbers:
Phone: +1-925-924-9500
Fax: +1-925-924-9600 and request for Sales

Technical Support

One of the value propositions of AdventNet to its customers is excellent support. During the evaluation phase, the support program is extended to users free of charge.

For support, please mail to support@servicedeskplus.com.

Alternatively, you can submit your feedback from the ServiceDesk Plus product by clicking the **Feedback** link at the top right corner just above the header tabs after logging in to the application. Your feedback will be sent to the ServiceDesk Plus Support Team and they will get in touch with you. Do not forget to provide your e-mail ID or your contact information for the team to get in touch with you.

Release Notes

This section talks about the new features that have been included in the current release of ManageEngine ServiceDesk Plus. The feature list will be available in the topic What is New in This Release. For more detailed information on any specific feature, refer to the corresponding feature page.

What is New in Release 4.1

- Active Directory Authentication
- Active Directory Integration and Import Requesters from a CSV file
- Data Back Up and Recovery
- Import Assets from a CSV file
- User Survey
- Search Requesters
- Request On Hold
- Renew Contract
- Delete Purchase Order
- Add Notes for Requesters
- Public and Private Notes
- Notifying Technicians When a New Request is Created
- Copy Assets
- Auto Assigning of Software Licenses
- Add New Option in Various Forms
- Windows 9x / NT scan support

Active Directory Authentication

ServiceDesk Plus now enables active directory authentication. The requesters and technicians can now login to ServiceDesk Plus with the same user name password as that of their domain or system login name and password. Once this value is entered in the login form, the details are authenticated against the entry available in the Active Directory.

Active Directory Integration and Import Requesters a CSV file

ServiceDesk Plus allows you import requester details from an active directory or from a CSV file. This simplifies the process of adding the requesters to the application and saves on your time in setting up ServiceDesk for your enterprise.

Data Back Up and Recovery

ServiceDesk Plus provides you an option to take a back up of the data and recover the same when required.

Import Assets from a CSV file

ServiceDesk Plus allows you to import assets from a CSV file, which simplifies the process of addition of all the assets owned by your organization. Most of the applications support the export of asset information in the form of a CSV file. The details from this file can be easily imported to ServiceDesk Plus.

User Survey

ServiceDesk Plus now has the user survey / customer satisfaction survey that can be scheduled and administered to the requesters based on the need. This helps in collecting data on important parameters of the support team which will help in improving the service quality of the team. The reports related to the user survey can be found in the Reports module of ServiceDesk Plus.

Search Requesters

Using the Search in option of ServiceDesk Plus, you can now search for requesters. You can also search for requesters in the requesters details page and also in the requester look up window. This is very useful in searching for requesters when requester list is huge.

Request On Hold

You can now move request to on hold status if the request has not moved into overdue state. When the request is moved to on hold state, the timer is stopped and restarted once the request moves out of the On Hold status.

Renew Contract

Using ServiceDesk Plus' renew contract feature, you can renew a contract and configure the details of the renewed contracts to maintain the records of the same. The contract details before renewal is also retained for future reference.

Delete Purchase Order

You can now delete the purchase orders that you had added. Due to various reasons, purchase orders that were raised get revoked and need to be cancelled. You can remove such POs by deleting them.

Add Notes for Requesters

Now requesters can also add notes from their Self-Service Portal login to the requests created by them. But they will not have permissions to delete the notes.

Public and Private Notes

ServiceDesk Plus now allows technicians to add notes and choose them to be public or private. When a technician adds a public note the same will be visible to the requester who raised the request. These notes can also be deleted.

Notifying Technicians When a New Request is Created

ServiceDesk Plus now allows you to notify a technician or a group of technicians either through an e-mail or SMS as soon as a new request is created.

Copy Assets

You can create copies of existing assets using the copy assets option in ServiceDesk Plus Assets module. This enables you to easily create as many assets in that component that is available in the organization.

Auto Assigning of Software Licenses

From the software details page, you can automatically allocate licenses to workstations that are listed under the unlicensed installation section. You can do this only if there are enough licenses available for the software.

Add New Option in Various Forms

ServiceDesk Plus user experience is enhanced by including add new option in various forms that enables the user to add new items without having to suspend the current operation that is being carried out. This option is available only to the admin user of ServiceDesk Plus.

Windows 9x / NT Scan Support

You can now scan windows 9x and NT machines from ServiceDesk Plus application and track the assets associated to these machines.

Requests

ManageEngine ServiceDesk Plus request module helps you better manage the services provided by your IT services team. The requests module can be used to track outstanding and overdue requests that need immediate attention and thus improves the response time and resolution time of your IT services team. Apart from this, ServiceDesk Plus allows you to add relevant notes pertaining to the request that is being handled. This note can contain any information such as the exact scenario of the request or how the issue was resolved. Also every action performed on the request in the ServiceDesk Plus application is stored in the **Request History**.

Clicking the **Requests** tab on the header pane takes you to the request module. Here the term request denotes any service that is requested by a user from the internal IT services team. The requests can be submitted to the system via mail or a web-based form. Sometimes, the requests can also be placed through a phone call during which, the help desk agent has to record the details of the phone call in the web-based form and assign priority and technician based on the urgency of the request. The various actions that one can perform in the request module are explained in the respective sections.

To ease the process of tracking the requests posted by individual requesters, a **Self Service Portal** has been provided. This can be used by the individual requesters to track the status of their requests and to look up solutions from the online knowledge base. To access this self-service portal, the requesters need to log in to the ServiceDesk Plus application using their respective user name and password. For more details on self-service portal, refer to **Self Service Portal** topic.

Creating a New Request

When system users need a service from the system administration team relating to the assets or any other service such as software installation and so on, they can send a request to the team. There are different modes of placing a request to the system administration 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 request using the web-based form

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

Quick Create

You can create a request quickly using the **Quick Create - New Request** form. This form is available in the ServiceDesk Plus home page and in requests list page. Enter the **Requester Name**, **Request Title**, and **Description** in this form and click **Save**. You select the requester name by clicking the user look up button beside the name field. If you feel you want to add more details before submitting, then you can do so by clicking the **Add more Details** link beside the **Save** button.

The **Quick Create - New Request** form comes in handy when help desk agent is loaded with work. He/she just has to enter the requester name, request title, and description. The other details can be filled in by the technician who handles the request.

Providing Request Details

In the new request form, the first block has details regarding the request, such as status of the request, mode of request submission, request level, and even assigning the respective technician who has to handle your request. All these are drop-down boxes containing predefined values that can be added from the Admin module.

While submitting a new request, the default entry of the **Status** of the request will be **Open**. Depending on the form of request submission (phone call/e-mail/form), you can select the **Mode**.

For example, if a user calls the ServiceDesk Plus agent to report an issue and place a request, the ServiceDesk Plus agent selects the mode as **Phone Call** and then record the other details of the request.

Based on the request content, the **Level** of the request also can be assigned. If unsure the default entry can be left as is. Finally, from the list of available technicians, you can assign the **Technician** who has to attend to the request. Only an IT help desk team member will be able to assign a technician to the request. Others can create a request, but cannot assign a technician to the request.

Additional Request Details

You can define your own organization-specific fields that do not appear in the **New Request** form, from the **Admin** module. The fields defined there will be available in this block of the form. Depending on the fields, enter the required values for the fields. To know more about how to add user-defined fields in the new request form, refer to the Configuring Additional Fields section in the request form under the Helpdesk configurations.

Selecting the Requester

You can select the requester from the list of users using the ServiceDesk Plus application.

1. In the **Requester Details** block of the **New Request** form, beside the name field, click the requester lookup button (). The **Search Requester** window pops up.

2. From the above list of requesters, you can select the radio button beside the name of the requester.
3. If the requester list is huge, then you can choose to view only a select group of requesters by clicking the alphabets at the top, or by entering a search string and clicking **Go**. Now choose the requester name. The name of the requester is displayed in the **Name** field in the **Requester Details** block. If there are any other details associated with the requester, such as **Contact Number**, **Department**, and **Workstation**, then the relevant details will be populated in the respective fields.
4. If there are more than one workstation associated with the selected requester, choose the relevant workstation from the drop-down box.

Classifying Request Category

Under the **Task Details** Block, there is a **Category** drop-down box. This lists the various categories under which a request can be classified. You can select the relevant category under which your request can be classified. For more details on category, refer to Configuring Request Category under the Helpdesk Configurations section.

Prioritizing Request

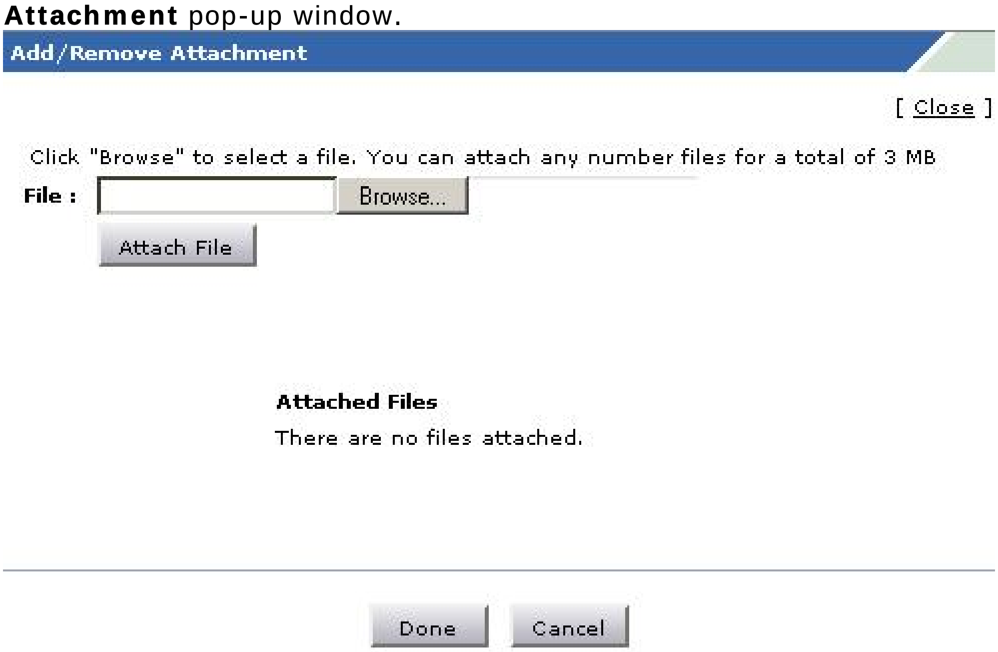
In the **Task Details** block, you is a **Priority** drop-down box. This lists the various priority levels that can be assigned to a request. You can choose the relevant priority level for your request from the list displayed. For more details on priority, refer to Configuring Request Priority under the Helpdesk Configurations section.

Describe Request

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

Add Attachments to the Request

1. In the Task Details block, below the Description text box, click the **Add / Remove Attachments** link beside the image. This opens an **Add/Edit Attachment** pop-up window.



2. Click the **Browse** button and select the file to be attached from the file chooser window and click the **Open** button.
3. Click the **Attach File** button. The selected file will be listed in the table below the **Browse** button. If you have more files to choose, follow steps 2 and 3 repeatedly till you have attached all the relevant files. Please ensure that the total size of the attachments does not exceed 3 MB.
4. Click **Done**. The selected files are attached to the request.

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

Modes of Creating a Request

You can create a new request in one of the following methods:

1. **E-mail** the request to the help desk team. This e-mail will be automatically converted to a new request in the ServiceDesk Plus application.
2. Call up the 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 Request form available in the Request module.
3. Log in to the ServiceDesk Plus application using your own user name and password and fill in the **New Request form** or **Quick Create - New Request** yourself and submit your request.

Viewing a Request

To view a request available in the ServiceDesk Plus Request module

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Requests** tab in the header pane. The next page lists all the requests available in the ServiceDesk Plus application in the **Open** status. Unassigned and assigned requests that have not yet been viewed by the corresponding technician even once will be in bold text, while the viewed requests will be in regular font.
3. Click on the **Title** of the request that you want to view. This opens the **View Request** page that contains four tabs: **Request**, **Resolution**, **History**, and **Notifications**.
4. In the **Request** tab, the data is grouped in a logical manner. The request header contains the request ID, category, level, status, and priority. The request summary, description, name of the requester who raised the request, and the due date of the request are displayed in the next block. Next is the **Conversations** block, which displays the mail transactions / threads that have been exchanged between the technician and the requester, related to the request. The conversations are listed in the ascending order of the time. In the **Request Details** block, details such as mode of the request, technician attending to the request, created date, and due date are displayed. In the **Requester Details** block, details of the requester such as name, workstation which has the issue, e-mail ID, contact number, and location are displayed. Finally all the **discussion notes** are listed in the descending order of their date of creation.
5. To view the attachments to the request, click the file.

The **Created Date** field displays the time when the request was created. Based on the priority of the request and SLA that is associated with the requester/workstation/department, the **Due By Date** is calculated. If you have responded to the requester then you will see the **Responded Date** displayed just below the **Priority** field in the **Request Details** block. When you add any notes to the request, it gets appended below the **Task Details** block. The **Time Spent** on the request will also be calculated and displayed. The total time spent will exclude the time that the request was on hold and then calculate the total time from the time of creation till the request was closed.

If any notes are added to the request, they will be available below the description of the request. The notes are displayed in the descending order, with the latest added note displayed first and the rest below that. The notes can usually be added to convey any technical information related to the request or to convey the request status.

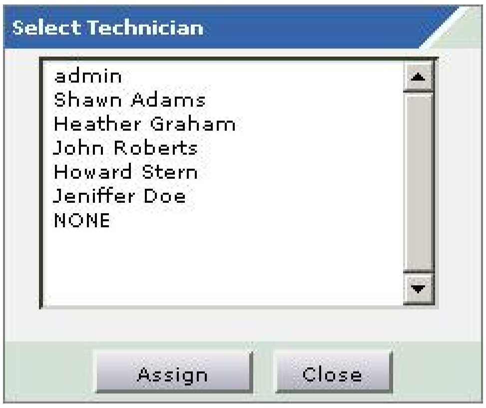
If there are any additional user-defined fields that have been added to the new request form, they are grouped under the **Additional Request Details** head and displayed just below the Request Details block.

Changing Technician

In the view request page, you can change the technician handling the request.

1. Click the **Change** link beside the technician name.
2. The **Assign Technician** window opens with the list of technicians available. Select the technician you want to reassign the request. You can also select

   NONE. This will unassign the request.



3. Click **Assign**. The **Assign Technician** window closes and the view request page refreshes to reflect the change in the details.

The unassigned request will be displayed in bold font.

Viewing Resolution

To view the resolution for the request in the view request page

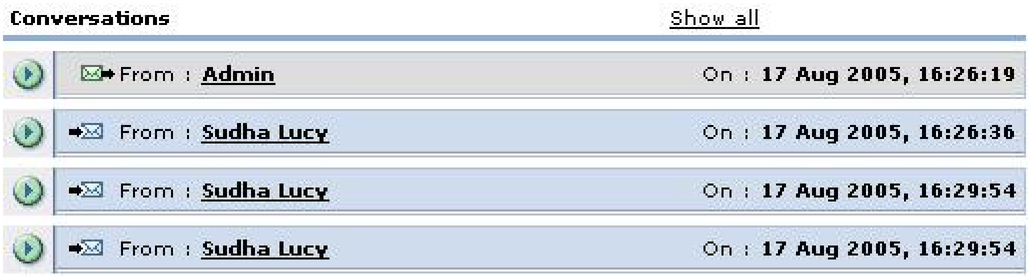
1. Click the **Resolution** tab.
2. If there are no resolutions for the request, then a message ***No Resolution Available*** is displayed. To search for resolutions from the solutions database, click the ***Look up for resolution from solutions database*** link.
3. The resolution is a documented information of how the issue was resolved. This documented information can be very useful for future reference. This resolution can also be added to the knowledge base as an article which can be searched by requesters for resolving issues faced by them.

Viewing History

To view the request history from the time of its creation, click the **History** tab in the view request page. 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.

Request Conversations

ServiceDesk Plus displays the mail transactions happening between the technician handling a request and the requester, as conversations. The conversations are listed one below the other in the ascending order of the time when the notification (response) was sent (received). You can choose to Show all or Hide all conversations.



To view all the conversation details, click the **Show all** link in the top right corner of this block. If the conversations / threads are in the expanded view, then the Show all link is replaced with the **Hide all** link. Clicking this will collapse all the conversations.

Split As New Request

You can choose to split any of the conversations into a new request.

To split the conversation as a new request

1. Expand the conversations by clicking on the **Show all** link or by clicking the > button on the left of the row which you wish to expand.
2. Click **Split as New request** button at the right bottom of that conversation.

This splits the conversation into a new request.

Delete Conversation

You can delete a specific conversation. To delete a conversation

1. Expand the conversations by clicking on the **Show all** link or by clicking the > button on the left of the row which you wish to expand.
2. Click **Delete** button at the right bottom of that conversation. A confirmation pop-up opens.
3. Click **OK** in the confirmation pop-up to delete the thread/conversation.

Editing a Request

To edit a request available in the ServiceDesk Plus Request module

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Request** tab in the header pane. This opens the **Requests** list.
3. Click the **Title** of the request which you want to edit.
4. The **View Request** page lists the **Tasks** that can be performed on the request. Here click the **Edit Request** link. This opens the request in an editable format.

Alternatively, in the Requests list view itself, click the edit icon beside the request **Title**.

Modifying the Request Details

In the editable request form you can change the request details, such as **Technician** handling the request, **level** of the request, and **status** of the request. If the submitted request has been attended to and completed in all aspects then you can close the request while editing the request itself by changing the status from **Open** to **Closed**, or you can move the request to **On Hold** status if you are waiting for some information before continuing to solve the issue reported. When you are ready to restart work on this request, click **Start Timer** link in the tasks block on the right side, or edit the request and change the status to **Open** or **Closed** as per your need. When you click the Start Timer link, a pop-window opens requesting you to enter the reason for starting the timer again. Type the relevant reason and click **Add**. This reason gets appended to the request history.

Moving the request on hold helps in the calculating the exact time taken to solve the request excluding the idle time when the request remained open, which is very essential in calculating the cost per technician time. You can also edit the **Due by Date** of the request. If the request has been closed, then the completed date will be displayed beside this due by date, which is not editable.

Modifying Additional Request Details

If the new request form had any custom fields, then you will be able to edit the values specified in these fields under the Additional Request Details block.

Changing the Workstation

While submitting the request, if the requester had by mistake associated a wrong workstation for the request, then the technician or the Help Desk agent can modify the same by choosing the right workstation from the drop-down list. You can choose the workstations that need to appear in this list in the request form default configurations .

Modifying the Request Category and Priority

In the Task Details block of the edit request form, you can change the category and priority of the request if the same was not appropriately chosen at the time of submitting the request.

Modifying the Request Description

You can modify the title and description of the request to completely capture the actual nature of the task at hand.

Once you have done all these modifications, click the **Update Request** button to save the changes made to the request. At any time during modification, if you feel that the modifications performed are erroneous, then instead of clicking on the Update Request button, click the **Reset** button. This clears all the modifications and displays the request with the original details. Clicking the **Back** button takes you back to the previous page which you were visiting before you came to the **Edit Request** page.

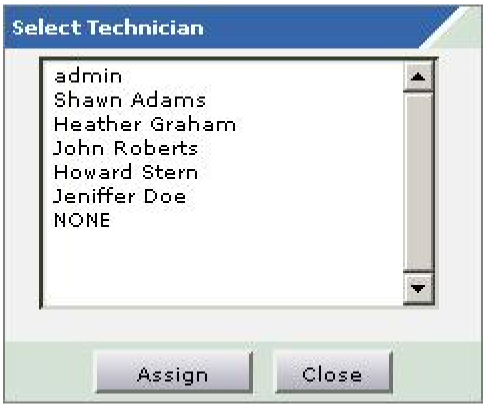
In the editable mode, only the above-mentioned fields can be modified in the request form.

Assigning a Technician for the Request

Each request will be owned by a technician, who would be responsible for handling the request till it is closed.

To assign a technician

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Request** tab in the header pane. This opens the **Requests** list.
3. Click the **Title** of the request for which you have to assign a technician.
4. The **View Request** page lists the **Tasks** that can be performed on the requests. Here click the **Assign Technician** link. Alternatively, you can also click the **Change** hyperlink available beside the **Not Assigned** text in **Technician** field of the Request. This opens **Select Technician** pop-up window, with a text box listing all the technicians in the IT help desk team as shown below.

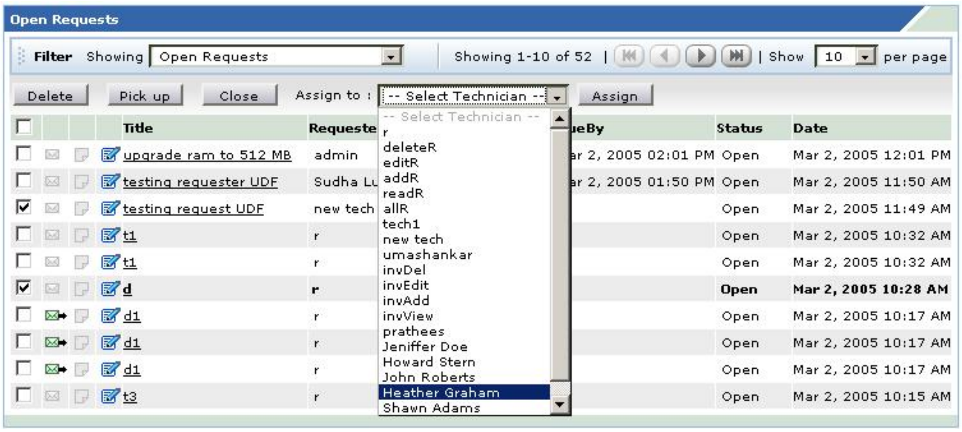


5. Now select the technician and click **Assign**. You can see that the selected technician has been assigned to handle the request and when the technician logs into ServiceDesk Plus, he/she would see this request in the **My Open Requests** list. If you do not wish to assign the technician then you can just close the pop-up by clicking **Close**.

You can also assign more than one request at a time to a technician.

To bulk assign requests to technicians

1. In the **Requests** list page, select the check box available beside the **Requester Name** field, for the requests that you wish to assign technician.



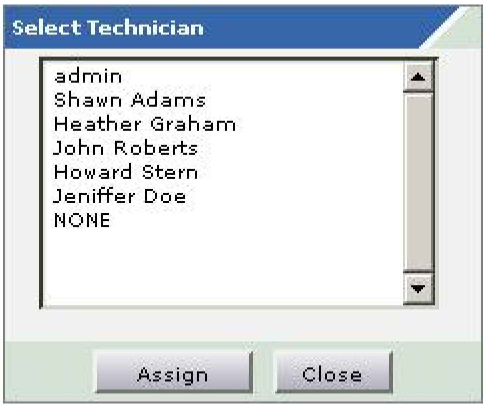
2. Now, from the **Assign to** drop-down list of technicians, select the technician to whom you want to assign the requests.
3. Click **Assign**.

Unassigning a Technician from a Request

Each request will be owned by a technician, who would be responsible for handling the request till it is closed. You can unassign a request from the request and move it back to unassigned status.

To unassign a technician

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Request** tab in the header pane. This opens the **Requests** list.
3. Click the **Title** of the request for which you have to unassign a technician.
4. The **View Request** page lists the **Tasks** that can be performed on the requests. Here click the **Assign Technician** link. Alternatively, you can also click the **Change** hyperlink available beside the technician name in **Technician** field of the request. This opens **Select Technician** pop-up window, with a text box listing all the technicians in the IT help desk team as shown below.



5. Now select the **NONE** and click **Assign**. The request will be unassigned. If you do not wish to unassign the technician then you can just close the pop-up by clicking **Close**.

Picking up Requests

ManageEngine ServiceDesk Plus provides the option of self-pick up of requests that are received in the requests module. If there are unassigned requests in the application, then the technicians can themselves pick up requests. This increases the efficiency in the turnaround time of the IT help desk team as the requests are assigned and answered sooner and waiting time of the request till it is assigned is reduced.

To pick up requests

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Requests** tab in the header pane. The unassigned requests will be in bold font.
3. Select the check boxes beside the **Requester Name** field of the request that you want to pick up for yourself and click the **Pick up** button. The selected request are assigned to you

Viewing Requester Details

When attending to a request, you may want to contact the requester to get additional information. To view the requester's contact details

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Request** tab in the header pane.
3. Click the **Title** of a request.
4. The **View Request** page opens. In the **Requester Details** block, click the **Requester Name** link. **View Requester Details** pops up where you can view details, such as name, designation, employee ID, department to which the requester belongs, e-mail ID, and phone and mobile numbers. Alternatively, you can also click the **View Requester Details** link available in the tasks block on the right side.

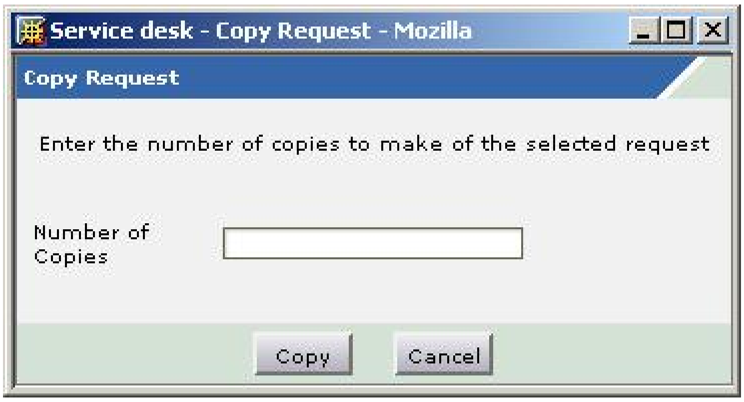
5. Once you have finished viewing the details, click the **Close** link available at the top right corner of the pop-up.

Copying a Request

When a single request has multiple issues in it that requires more than a single technician to handle them, then the request can be duplicated and each of the duplicated requests can have only one issue. This makes it easier for the technician to take ownership and complete the task independently.

To make multiple copies of the request

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Request** tab in the header pane.
3. Click the **Title** of the request that you want to duplicate.
4. In the **View Request** page, on the right-side **Tasks** block, under the **Actions**, click the **Copy this Request** link. A **Copy Request** pop-up window opens, requesting you to give the number of copies.



5. Enter the number of copies in the text field provided beside the **Number of Copies** label. The maximum value you can enter is 9. If you need more than 9 copies of the request, then you need to invoke **Copy Request** again.
6. Click **Copy** to make the copies of the request. The new copies of the request will be assigned new request ID that will uniquely identify them. The rest of the information is retained as is.

Once you have created the copies of the request, you can edit the same to contain only the necessary information and assign appropriate technicians. You can modify the request copies by editing the copy of the request. To know how to edit a request, refer to the section Editing a Request.

While copying the request, the **Notes** added to the original request (if any) will not be present in the duplicated requests. Also, the **Created Date** and **Due by Date** will be different from that of the original request.

Merging a Request

When two or more requests are related to each other and are from the same requester, and can be handled by the same technician, you can merge these requests as one and assign a single technician for that request.

To merge one or more requests

1. Login to the ServiceDesk Plus application with the user name and password of the administrator or technician.
2. Click the **Title** of the request that you wish to merge.
3. Click **Merge Request** link available under the **Tasks** block on the right side. The Merge Request form pops up.

4. Enter the **Request ID** with which you want to merge the current request, in the text box provided.
5. Click **Merge**.

You can split a thread of a request into a new request. For more information on this, kindly refer to the section Request Conversations.

Printing the Request

To print a request

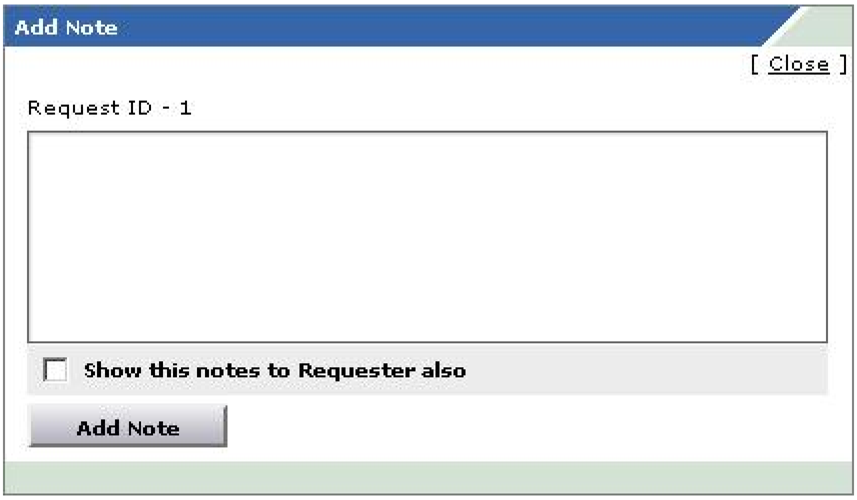
1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Request** tab in the header pane.
3. Click the **Title** of the request that you want to print.
4. Click the **Print Preview** link on the right side **Tasks** block.
5. The print preview of the request is opened in a pop-up window. Click the **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.

Adding Notes

When you would like to add some additional information including technical information to a particular request based on your observations, you can use **Add Notes**. You can also use notes to update the status of the request.

To add a note to a request

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Request** tab in the header pane.
3. Click the **Title** of the request to which you would like to add a note.
4. Click the **Add Notes** link under the **Tasks** block. The **Add Notes** pop-up window is displayed as below:



5. Enter your content in the text box below the **Request ID**.
6. If you want the note to be visible to the requester who posted the request, then select the check box provided.
7. Click the **Add Note** button. The note is added at the bottom of the request along with a date and time stamp. The name of the person who added the note is also displayed.

You can add any number of notes to a request. The added notes will be displayed in the descending order with recently added note first. You cannot edit or delete the notes that have been added.

Start / Stop Request Timer

When the technician is unable to continue work on a particular request and close it, for reasons, such as lack of necessary information, or waiting for delivery of hardware to fix the issue, he/she can move the request to on hold status. If this is not done, then the request will remain in open state idle. This will lead to violation in SLA that governs the request. Also, it will show that the time taken to close the request was high and will reflect on the efficiency of the techinician(s) handling the request. To avoid all these, move a request in the open state to on hold till the time you are ready to resume work on the same. For more information on the On Hold status refer to the Editing a Request topic.

Alternatively, you can stop the timer when you are not working on the request.

Stop Timer

To stop the request timer

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Request** tab in the header pane.
3. Click the **Title** of the request in the **Requests** list page.
4. Click the **Stop Timer** link under the **Tasks** block. A pop-up window opens requesting you for the reason for stopping the timer.
5. Enter the relevant reason to stop timer in the text area provided for the same.
6. Click **Add**.

The reason gets appended to the request history.

Start Timer

To restart the request timer

1. In the request details page, click **Start Timer** link under the Tasks block. A pop-up window opens requesting you for the reason for starting the timer.
2. Enter the relevant reason to stop timer in the text area provided for the same.
3. Click **Add**.

The reason gets appended to the request history.

Note: You can stop and start timer for requests that are not overdue.

Closing Requests

When a requester is completely satisfied that his/her request has been completely attended to and the reported problem has been solved, the request can be closed.

To close a request

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Request** tab in the header pane.
3. Click the **Title** of the request in the **Requests** list page.
4. Click the **Close Request** link under the **Tasks** block. This closes the request.

Alternatively, change the status field to **Closed** while the request is in editable mode.

You can reopen a request from the closed state. To do this, open the closed request that you wish to reopen in the editable mode and change the status field from **Closed** to **Open**. When a request is opened from the closed state, you can change the Due By time of the request when it is in the editable mode. Also, the closed date is removed once the request is reopened. When this request is finally closed, the **completed date** is updated and the **Time taken to close** is recalculated taking the reopened period into account.

To close more than one request at a time

1. In the **Request** list page, select the check boxes available beside the **Requester Name** field of the requests that you wish to close.
2. Now click the **Close** button.

To view the closed requests

1. From the Request list page, select **Closed Requests** from the Filter drop-down menu. This lists all the closed requests.
2. To view the closed requests which were assigned to you, select **My Closed Requests**.

Adding a Resolution

You can add resolutions for the issues reported in the requests.

To add a new resolution

1. Log in to ServiceDesk Plus using your user name and password.
2. Click the **Requests** tab in the header pane.
3. Click the request **Title** for which you want to add the resolution.
4. First check if a resolution already exists for the request or not by clicking the **Resolution** tab in the **View Request** page.
5. If the ***No Resolution Available*** message is displayed, then click **Enter Resolution** link available in the **Tasks** block on the right side.
6. The page is refreshed with a text box, where you enter the resolution for the request.
7. If you want to add the resolution to the solutions also, then click **Save and Add to Solutions**, or else click **Save**.
8. If you click Save and Add to Solutions, then the next page displays a message saying that the resolution is added and displays a **New Solution** form. The title of the solution is automatically filled with the title of the request. The **Contents** is filled with the resolution. You can edit both of them.
9. From the **Topic** drop-down list that contains all the available topics, choose a relevant parent topic for the solution.
10. Enter relevant keywords for the solution in the **Keywords** text box. Separate each keyword by a comma.
11. Click **Add**. This adds the resolution to the list of solutions also.

If you have clicked **Save** while adding the resolutions and want to add resolution now, click the **Add to Solutions** link. Now follow the steps 8, 9, 10, and 11 described above.

These added resolutions can be used for various purposes. One of them is to add these resolutions as knowledge base articles which can be used for future reference to solve the same issue if reported. The resolution of the request also helps other technicians to know the kind of solution provided to the reported issue. This serves as a documented proof of the way a reported issues was resolved.

Searching the Solutions

From the request, you can search for solutions that might help you solve the issue described in the request.

To search for solutions

1. Log in to ServiceDesk Plus using your user name and password.
2. Click the **Requests** tab in the header pane.
3. Click the request **Title** for which you need to look up the solution.
4. In the **View Request** page, click the **Resolution** tab.
5. Click the link **Look up for resolution from solutions database**. Alternatively, you can also click the **Search Solutions** link in the **Tasks** block on the right side.
6. In the **Search Solutions** page, provide a search string in the **Search** field and click **Search** or press **Enter**. The solutions that match the search string are displayed.

E-mail the Requester

Sending a response to the requester is required when a new request is received. Also, when a technician is ready to close a request, the same can be notified to the requester so that if the requester has any concerns about the same, he/she can raise. The technician can then address the same and close the request after the requester is completely satisfied with the way his/her request has been attended to.

To respond to the requester

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Request** tab in the header pane.
3. Click the **Title** of the request in the requests list page.
4. In the **View Request** page, click **E-mail the Requester** button just below the **Request Description** or the link on the right-side **Tasks** block, under **Notify**. This opens the **Send Notification** form.

5. Edit the **Subject** and **Description** of the notification and click **Send**. An e-mail is sent to the requester. If you want to send the same information to more than one person, then enter the e-mail IDs of those people in the **To** or **CC** field with comma as a separator.

The responses that have been sent to the requester can be viewed as **conversations** in the request details view.

Forward the Request

To forward a request

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Request** tab in the header pane.
3. Click the **Title** of the request in the requests list page.
4. In the **View Request** page, click **Forward the Request** button just below the **Request Description** or the link on the right-side **Tasks** block, under **Notify**. This opens the **Send Notification** form.

5. Enter the e-mail ID of the person to whom you wish to forward the request in the **To** field. You can also mark a copy of the forward to others. To do this, enter their e-mail IDs in the CC field.
6. Edit the **Subject** and **Description** of the notification and click **Send**. An e-mail is sent to all those whose e-mail ID is mentioned in the To and CC field.

E-mail the Technician

To e-mail a technician

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Request** tab in the header pane.
3. Click the **Title** of the request from the requests list page.
4. In the **View Request** page, on the right-side **Tasks** block, under **Notify**, click **E-mail the Technician**. This opens the **Send Notification** form.

5. Edit the **Subject** and **Description** of the notification and click **Submit**. An e-mail is sent to the technician. To send the information to more people, enter their e-mail IDs in the **To** field separated by comma.

A technician can be notified when a new request is assigned or an already existing request is reassigned to him/her.

SMS the Technician

ManageEngine ServiceDesk Plus enables you to notify a technician through SMS also.

To send an SMS to a technician

1. Log in to ServiceDesk Plus using your user name and password.
2. Click the **Requests** tab in the header pane.
3. Click the request **Title** which is assigned to the technician whom you wish to notify through an SMS.
4. In the **View Request** page, on the right side under **Notify**, click **SMS the Technician**.
5. The **Send Notification** window opens with the **To** address displayed as **<mobile number>@<service provider>.com**. You can configure the service provider details in the admin configurations. The subject line reads as **Notification for Request id <number>**. The **Description** has the request ID, created time and due by time, and request title information. You can add your message to this or edit this and send type the necessary information.
6. Click **Submit**. A message is displayed in the window, stating that the SMS is sent.
7. Click **Close**. This closes the notification window.

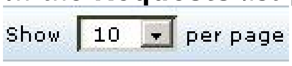
The SMS notification is also available under the **Notifications** tab of the request. You can view the contents of the notification by clicking the **View Details** link beside the notification information.

Viewing Requests Based on Filters

ManageEngine ServiceDesk Plus allows you to view the list of requests. You can also apply various filters to this list and view only a specific group of requests that you would like to view. This filtering helps you focus on just the requests that you wish to look at.

To view the whole list of requests available in the ServiceDesk Plus application, click the **Request** tab in the header pane. This lists all the open requests available in the ServiceDesk Plus application. You can set the number of requests that you would like to view in a single page:

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Requests** tab in the header pane.
3. In the **Requests** list page, click the drop-down box (shown in the figure below):



4. From the drop-down list, select the number of records that should be displayed in a single page.

You can use the following filters to view only a specific group of requests:

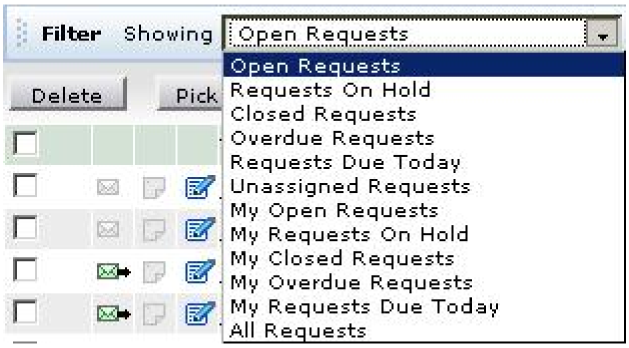
Open Requests

When you click the requests tab, this filter is selected by default and lists all the request that are in the open status.

Requests On Hold

To view all the requests that have been attended to and closed

1. Click the **Requests** tab in the header pane to open the **Requests** list page.
2. From the **Filter** drop-down box, select **Requests On Hold**.



Closed Requests

To view all the requests that have been attended to and closed

1. Click the **Requests** tab in the header pane to open the **Requests** list page.
2. From the **Filter** drop-down box, select **Closed Requests**.

Overdue Requests

When a request has not been attended to and closed within the **Due By Time** that is displayed in the request, they are moved under **Overdue Requests**.

To view all the overdue requests

1. Click the **Requests** tab in the header pane. This opens the **Requests** list page.
2. From the **Filter** drop-down box, select **Overdue Requests**. All the overdue requests that are yet to be closed will be listed.

Requests Due Today

To view the requests that are due for the current day

1. Click the **Requests** tab in the header pane. This opens the **Requests** list page.
2. From the **Filter** drop-down box, select **Requests Due Today**. This lists all the open requests that are due for the current day.

Unassigned Requests

To view the requests that have not been assigned to any technician

1. Click the **Requests** tab in the header pane. This opens the **Requests** list page.
2. From the **Filter** drop-down box, select **Unassigned Requests**.

These requests will be in bold font.

My Open Requests

To view the requests assigned to you that are in open status

1. Click the **Requests** tab in the header pane. This opens the **Requests** list page.
2. From the **Filter** drop-down box, select **My Open Requests**.

Alternatively,

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. In the **Home** page, click the **Open Requests** link either within the **My Request Summary** block in the dashboard.

My Requests On Hold

To view the requests assigned to you that are in on hold status

1. Click the **Requests** tab in the header pane. This opens the **Requests** list page.
2. From the **Filter** drop-down box, select **My Requests On Hold**.

My Closed Requests

To view the requests assigned to you that are in closed status

1. Click the **Requests** tab in the header pane. This opens the **Requests** list page.
2. From the **Filter** drop-down box, select **My Closed Requests**.

My Overdue Requests

When a request assigned to you has not been attended to and closed within the **Due By Time** that is displayed in the request, they are moved under **My Overdue Requests**.

To view all the overdue requests assigned to you

1. Click the **Requests** tab in the header pane. This opens the **Requests** list page.
2. From the **Filter** drop-down box, select **My Overdue Requests**.

Alternatively,

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. In the **Home** page, in the **My Request Summary** block of the dashboard, click the **Requests Overdue** link.

My Requests Due Today

To view the requests that are due for the current day and assigned to you

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. In the **Home** page, click the **Requests due today** link available inside the **My Requests Summary** block.

Alternatively,

1. Click the **Requests** tab in the header pane. This opens the **Requests** list page.
2. From the **Filter** drop-down box, select **My Requests Due Today**.

All Requests

To view all the requests irrespective of their status

1. Click the **Requests** tab in the header pane. This opens the **Requests** list page.
2. From the **Filter** drop-down box, select **All Requests**.

Deleting Requests

You may receive lots of mails of which some may not qualify as requests at all and hence need to be removed from the ServiceDesk Plus application completely. In such cases, you can delete those individual requests in the view request page or select a group of requests in the list view page and delete them together.

To delete individual requests

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Request** tab in the header pane.
3. Click the **Title** of the request that you want to delete in the requests list view page.
4. In the **View Request** page, on the right-side **Tasks** block, under the **Actions**, click the **Delete this Request** link.

To delete more than one request at a time

1. In the requests list view page, select the check boxes provided beside the **Requester** column for the requests that you wish to delete.
2. Click the **Delete** button.

Searching Requests

ManageEngine ServiceDesk Plus gives you an option to search for requests using a keyword search. All requests that match the keyword that you have provided in the search will be displayed.

To do a keyword search in requests

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. On the left hand side web client, there is a **Search** block as shown in the figure below:

   In **Search in** drop-down box, select **Requests**. In the home page and the requests module, this is selected by default.

3. In the **Enter Keyword** text field, type the search string that you wish search for in the requests.
4. Click **Go** or press the **Enter** key on your keyboard. All the requests that match the search string are listed.

Note: The search would return the results for any of the text fields of the request. You will not be able to search for a request based on its ID or based on any of the date fields of the request.

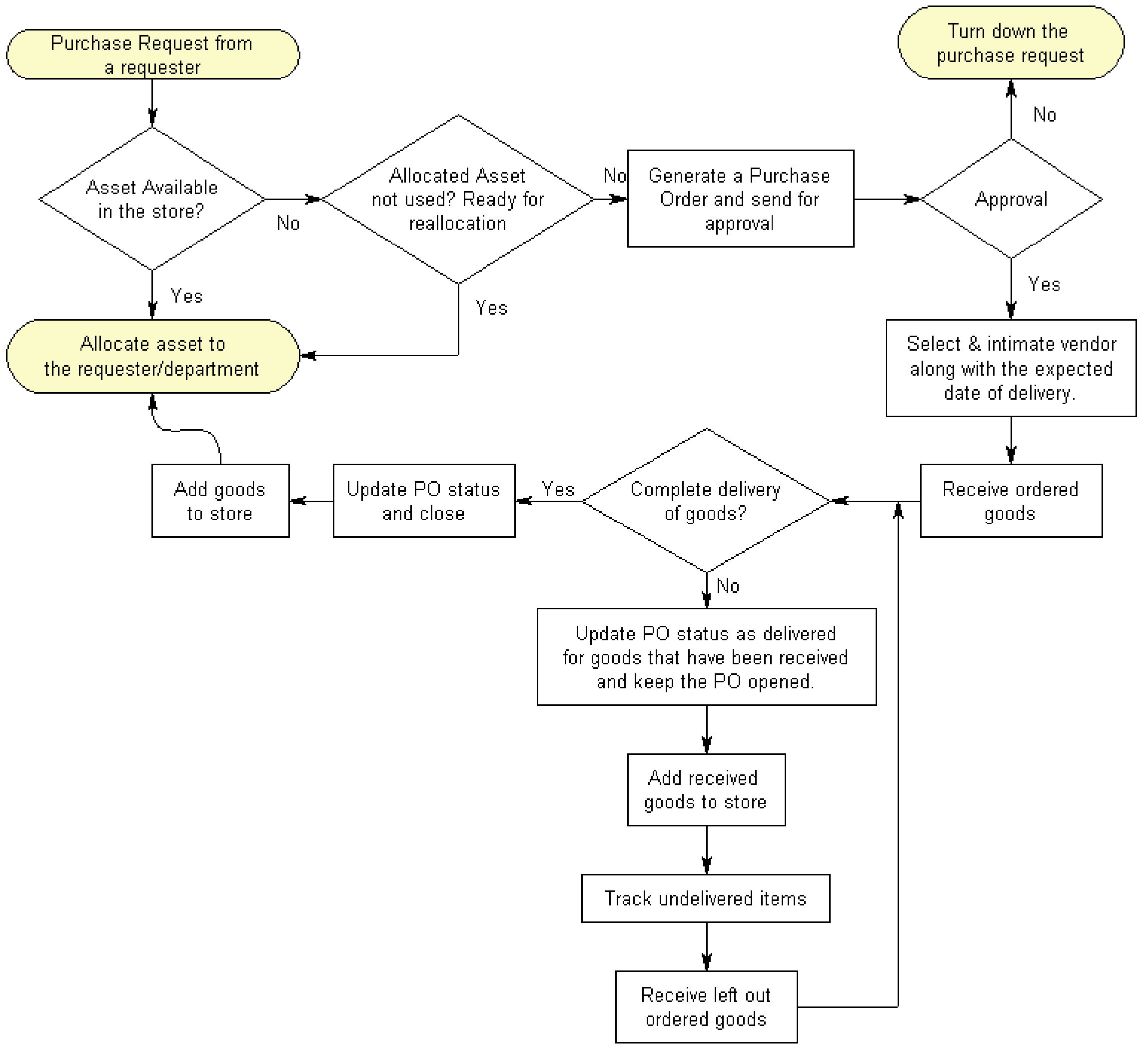
Inventory

ManageEngine ServiceDesk Plus inventory module helps in managing the IT resources/inventory of your organization effectively and thus helps in effective resource allocation and management. ManageEngine ServiceDesk Plus Asset Management tracks and manages your IT assets and their changing configurations and relationships at every stage of the lifecycle.

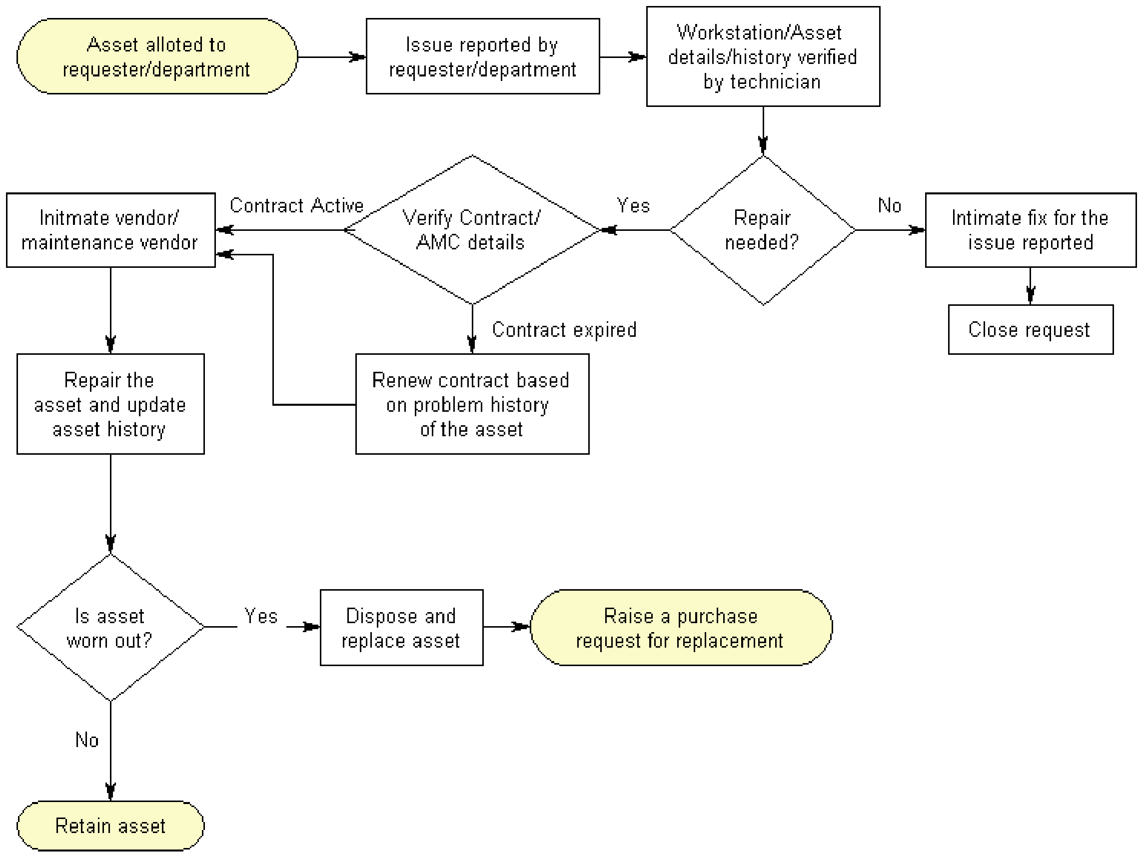
Organizations invest considerably in their IT assets that include hardware and software components such as PCs, servers, network devices, accessories, software licenses, system upgrades, and in-house developed software. To safeguard their investment, they need to know how and where the assets are used, how much they cost the company, what value they provide, and how they change over time. Organizations need to make sure that assets are maintained properly and upgraded when necessary so they are getting as much value from them as possible. For this, information on the vendors from which the asset was purchased, the contract details associated with the purchase, the maintenance contracts, maintenance cost incurred, and many other such data also need to be tracked.

ManageEngine ServiceDesk Plus Inventory module provides you with an effective way to manage your company's assets. The purpose of this module is to help your organization gain a clear picture of its distributed enterprise and how it is changing. By enabling you to conduct regular audits, ServiceDesk Plus helps you manage your IT assets from a physical perspective, capturing information such as CPU type and speed, amount of RAM, installed software, peripherals, and operating systems. This provides you with information, such as what assets you have, where they are, and how they are configured. To access the inventory module, log in to the ServiceDesk Plus application and click the **Inventory** tab in the header pane.

The following work flow figures provide you an idea about how an asset is procured and the various stages it goes through from the procurement to disposal and replacement.



Work flow describing the various stages of an asset from the point of allotment till its disposal or replacement.

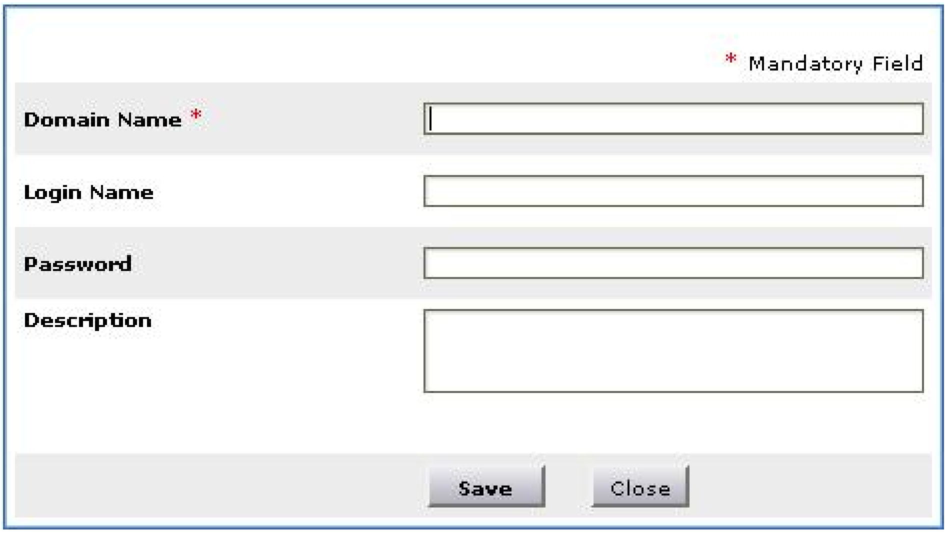


Scanning a New Workstation

When you have added a new workstation in the network after the initial configuration of the ServiceDesk Plus application, then you need to discover it or add it manually into the application. Refer to Adding a New Workstation topic to know how to add a workstation along with its details manually. Alternatively, you can scan for workstations in your network by providing the name or IP address of the workstation. This automatically detects the workstation, scans the same for its hardware and software details and updates the same in the application.

To scan for a new workstation

1. Log in to the ServiceDesk Plus using your user name and password.
2. Click the **Inventory** tab in the header pane. The inventory home displays the scanned workstation graph grouped by domains, and the assets available grouped by product types. Click the **Show All** link under the Workstations dashboard or **View Workstations** link in the left side View block to go to the list of workstations.
3. In the workstation list page, click **New Scan**. The **Scan Workstation** form is displayed. This helps you locate the workstation and scan the hardware and software information of the workstation.
4. Enter the workstation name or its IP address in the field labeled **Workstation Name / IP**.
5. If the workstation is a Windows workstation, then choose the **Domain Mode** value in the **Scan type** combo box.
6. Enter the **Domain Name / Network** from the combo box. If the domain is not available, then click the **Add new** link available beside it (This link will be visible only for the administrator). The **Add New Domain** window pops up.



7. Enter the **Domain Name**. This is a mandatory field.
8. Enter the **Login Name** and **Password** of the domain.
9. If you wish, then enter the **Description** for the domain in the text area.
10. Click **Save**. The new domain is added and gets selected in the combo box.
11. Click **Scan**. Based on the success or failure of the scan, a corresponding message is displayed at the top of the page. If you wish to scan the workstation at a later time, then click **Cancel** instead of proceeding with scanning.

Note:

1. Windows workstations can be scanned only when the ServiceDesk Plus application is running in a Windows OS.
2. Ensure that the domain login name and password has been provided for the selected domain for the scan to be successful.
3. A workstation is a virtual grouping of more than one asset.

Adding a New Workstation

The dictionary meaning of a workstation is that, it is a client computer (stand alone machine) on a Local Area Network (LAN) or Wide Area Network (WAN) that is used to run applications and is connected to a server from which it obtains data shared with other computers. We use the term workstation to indicate a PC asset that is usually associated with a user or with a physical location in the organization.

Initially when you start the ServiceDesk Plus application, you can discover the all the workstations in the network using Network Scan. This allows you to discover the domains in your organization and also the various workstations in each of the domains discovered. All the discovered workstations will be listed in the **Workstations** view. You can view them by clicking **View Workstations** link in the **Views** block in the left pane. After the initial discovery, if a new workstation is added to the network, you need add it manually to the application by either

- Adding a new Workstation using a web-based form, or
- Scanning a Workstation by providing its IP address or name

To add a new workstation using the web-based form

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Just below the tabs in the header pane, click the **New Workstation** link. A form for **Workstation Configuration** is displayed. The form has various fields grouped under the topics: **Computer**, **Network**, **Input/Output devices**, and **General Info**. Alternatively, you can also click the **New** button in the **Workstations** list page.
3. Enter computer **Name**. This is the only mandatory field in this form. Enter the same. If you have the other details about the workstation, you can enter them in the respective fields.
4. After entering the complete details, click **Save**. At any point, if you wish to cancel the adding workstation operation, click **Cancel**.

To add more workstations, click **Save and add new** instead of **Save**. This adds the current workstation information and opens the New Workstation form with pre-filled data, which is the information provided by you while adding the previous workstation. After adding the workstation to the list of workstations, you can retrieve the information of the workstation on a periodic basis though a scheduled scan.

Auditing Workstations

Manage Engine ServiceDesk Plus application enables you to perform scheduled auditing of workstations' hardware and software resources. You have the flexibility to suspend the audit and re-commence it at any time you want. The audit settings section allows you to configure scheduled audits on already discovered workstations.

Viewing Workstation Details

To view the list of discovered workstations in your network

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Inventory** tab in the header pane. If you are already in the inventory module then click the **View Workstations** link in the **Views** block in the left menu or from the inventory home, click **Show All** link under the **Workstation** dashboard. The list of discovered workstations are displayed.
3. To view the details of an individual workstation, click the corresponding **Workstation Name**. The workstation details are displayed under 5 headings, each in separate tabs: Workstation, Hardware, Software, Assets, History, and Requests.

Viewing Hardware Information

To view the hardware details of a workstation

1. In the workstations list page, click the **Workstation Name** for which you wish to see the hardware details. The workstation details such as the drive details, network adaptors, and other information are displayed.
2. Click the **Hardware** tab.
3. The center pane itself is divided into two sections. The various hardware components are listed in the left side. Clicking each of these displays the corresponding properties in the right side.

Viewing the Installed Software

To view the list of software that are installed in a specific workstation

1. In the workstation list page, click the **Workstation Name** for which you wish to see the list of installed software.
2. Now click the **Software** tab. The default view lists all the software inclusive of Managed, Excluded, Prohibited, and Unidentified.

To know more about the software types, refer to the View the entire Software List topic. The list displays the Software Name and the Software Type.

Delete Software from Workstation

You can also delete the software from this list. To delete software in the workstation

1. In the Software tab view of the workstation details, select the check boxes available beside the **software** name column for the software that you want to delete.
2. Click **Delete**. A confirmation dialog opens up.
3. To proceed with the deletion, click **OK**, or else click **Cancel**.

Search Software in Workstation

An option to search specific software that is installed on the workstation is available. Just above the software list, there is a search field. Enter your search string in that field and click **Go**. The page is refreshed with software list that match the search string.

Viewing Attached Assets

Other than the hardware and software details specific to a workstation, there may be other assets that have not been grouped under hardware or software, but are associated with the workstation. To view these assets

1. In the workstation list page, click the **Workstation Name** for which you wish to see the list of the installed software.
2. Now click the **Assets** tab. The assets associated to the workstation will be listed.

If there are no associated assets, you can associate or add assets yourself. To add new assets, refer to the Adding New Asset topic. To attach existing assets, refer to the attaching assets topic.

Viewing History

To view the workstation history

1. In the workstation list page, click the **Workstation Name** for which you wish to view the workstation history. The details of the workstation are displayed with the **workstation** tab selected by default.
2. Click the **History** tab.

The workstation history tab provides the information about the audits/scans performed on the workstation and if there are any changes between the previous scan and the latest scan in the installed software list in the workstation, then the changes are displayed just below the scan date and time.

Viewing Requests

To view the requests that were generated for a particular workstation

1. In the workstation list page, click the **Workstation Name** for which you wish to see the requests generated. The details of the workstation are displayed with the **workstation** tab selected by default.
2. Click the **Requests** tab. The list of requests sent for the workstation will be displayed.
3. To view the individual request details, click the request **title**.

The workstation request history will help in analyzing the kind of issues that have been reported from a particular workstation and this information can be used for scheduling the workstation maintenance or in making replacement decisions based on the request history.

Scanning the Workstation

The scheduled audit of the workstations and network retrieves the necessary information about each of the workstations connected to the network. ServiceDesk Plus allows you to scan individual workstations apart from the scheduled audit. This enables you to update the latest workstation details.

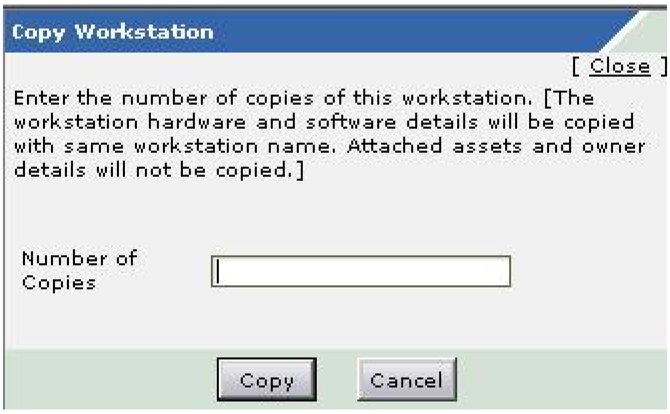
To scan a workstation

1. In the workstation list page, click the **Workstation Name** that you wish to scan.
2. On the right side in the **Actions** block, click **Scan Now**. Alternatively, you can also click the **Scan now** link at the bottom of the page. A pop-up window will open to show the status of the scan.

Copying the Workstation

You can copy the details of the workstation that you are viewing:

1. In the workstation list page, click the name of the workstation that you want to copy.
2. In the right side **Actions** block, click the **Copy Workstation** link. The **copy workstation** window is opened.



3. Enter the number of copies that you need.
4. Click **Copy**. A message is displayed stating that the copies are created successfully. Clicking **Cancel** closes the window without creating the copies.
5. Click **Close** on the top right of the window.

You can view the copies of the workstation in the workstation list view. All the details of the workstation, except the workstation ID and workstation name, will be the same. You can edit the details of the workstation.

Note:

1. Only 10 copies of a workstation can be created at a single go. To create more copies, you need to invoke the Copy Workstation window once again.
2. While copying workstation, the owner details, the requests raised, from the workstation, the assets, and software attached will NOT be copied.
3. The workstation name of the workstation copy will be <workstationname>_COPY. You can change the name of the workstation later.

Editing the Workstation Details

To edit the workstation details that are displayed in the view page

1. In the workstation list page, click the name of the workstation that you want to edit. The details of the workstation are displayed with the **workstation** tab selected by default.
2. On the right side, in the **Actions** block, click **Edit Workstation**. The **Edit Workstation** form is displayed where the various fields are grouped under **Computer**, **Network**, **Input/Output Devices**, and **General Info**. These fields in form are already filled with the information that was fetched while scanning the workstation or with the information that was entered while manually adding the

workstation details. You can now modify the values in the fields or add entries to the empty fields.

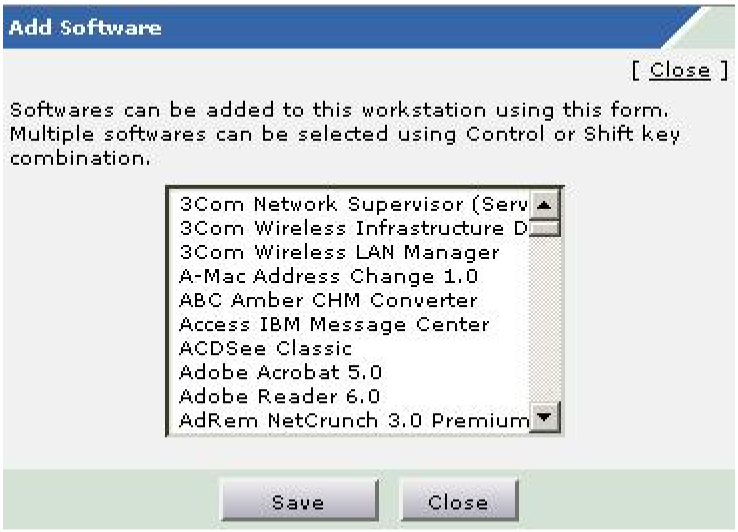
3. On completely editing the details, click **Save**. If you wish to cancel the edit operation, click **Cancel**.

Adding Software to Workstation

If you notice that some software are missing from the workstation software list, you can add them yourself.

To add software

1. In the workstation list page, click the name of the workstation for which you want to add the software.
2. On the right side, in the **Manual Additions** block, click **Add Software**.
3. The **Add Software** window opens. This has the list of software. You can select the software from the list. To select more than one software, use **Shift** or **Ctrl** key in your keyboard.



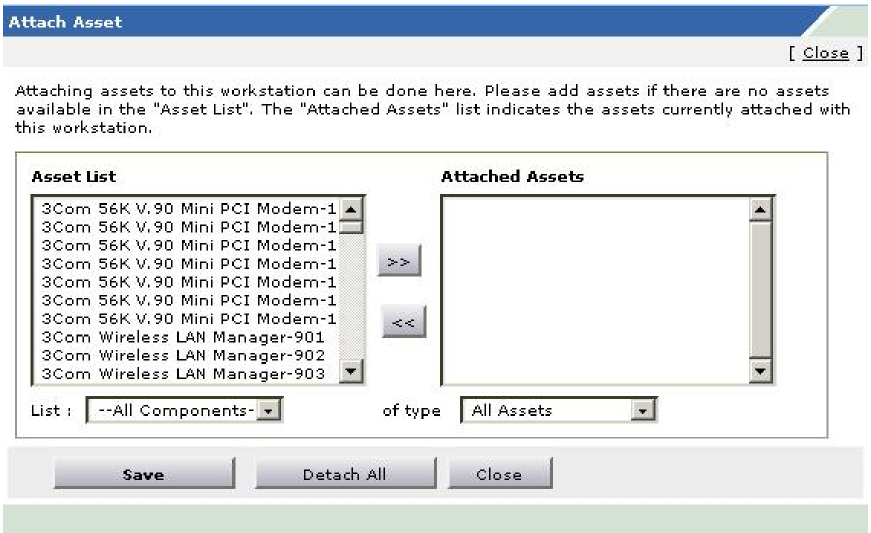
4. After selecting, click **Save**. The selected software is appended to the existing workstation software list.

Attaching Assets

You can associate various assets with workstations while viewing the workstation details itself. When you attach assets, you will be associating a specific asset with the workstation. For example, a network card has been added to a workstation and you want to make that association in the ServiceDesk Plus application also. You can do that using the attach asset option.

To attach assets to the workstation that is being viewed

1. In the workstation details page, click the **Attach Assets** link in the **Manual Additions** block on the right side. The **Attach Asset** window opens. By default, the **asset list** will have all the unassigned asset components.



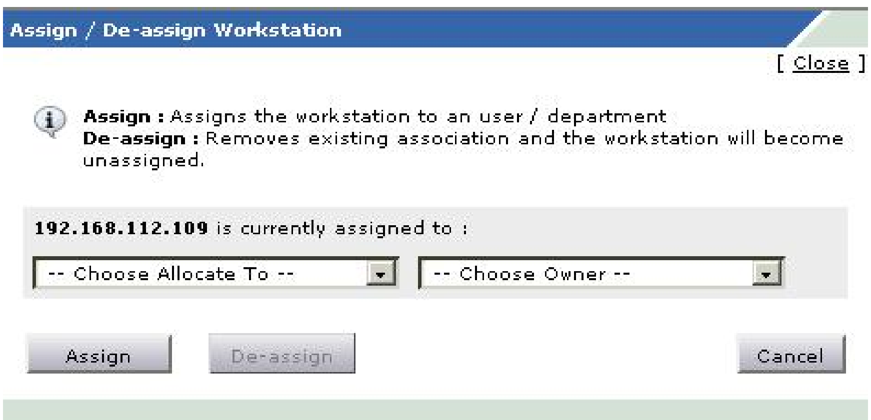
2. If you want only specific assets to be listed, you can choose them from the list combo box, which is a filter for the asset list values.
3. Select the assets that you want to associate with the workstation and click the >> button to move them to the **Attached Assets** list. To select multiple assets from the asset list, use **Shift** or **Ctrl** key of your keyboard while selecting the assets.
4. Click **Save**. A message is displayed stating that the assets are attached successfully.
5. Click the **Close** link available at the top right corner of the **Attach Asset** window.

To dissociate the assets, select the assets from the **Attached Assets** list and click the << button. If you want to detach all the assets from the workstation, then in the **Attach Asset** window, click **Detach All** button.

Assigning Owner

To associate a owner with the workstation

1. In the workstation list page, click the **Workstation Name** for which you wish to associate the user. The details of the workstation are displayed with the **workstation** tab selected by default.
2. On the right side, in the **User details** block, click **Assign Owner**. The **Owner Association** window opens. Here you can allocate the workstation to either a department or an individual user.



3. From the first combo box, choose either **User** or **Department** as values. This populates the second combo box with the relevant values of either the available user names or department names based on your choice.
4. From the **Choose Owner** combo box, select the user name or department name to which you wish to assign the workstation.
5. Click **Assign**. A message is displayed stating that the owner is assigned successfully.
6. Click **Close**. In the workstation details view page, in the top right corner of the center pane, the user details are displayed.

Alternatively, you can also associate the user from the workstation list view page.

1. In the workstation list view page, click the icon displayed in last column. The owner association window opens.
2. From the first combo box, choose either **User** or **Department** as values. This populates the second combo box with the relevant values of either the available user names or department names based on your choice.
3. From the **Choose Owner** combo box, select the user name or department name to which you wish to assign the workstation.
4. Click **Assign**. A message is displayed stating that the owner is assigned successfully.
5. Click **Close** in the pop-up window.

Changing Owner

You can change the user who is associated with the workstation.

To re-associate or dissociate a user of a workstation

1. In the workstation list page, click the name of the workstation for which you wish to re-associate or dissociate the user. The details of the workstation are displayed with the **workstation** tab selected by default.
2. On the right side, in the **User details** block, click **Change Owner**. The owner association window opens with the associated user chosen in the combo boxes.
3. Select the user name or department name to which you wish to re-associate the workstation and click **Assign**. A success message is displayed in the pop-up. In the workstation details view page, in the top right corner of the center pane, the modified user details are displayed.
4. If you just want to remove the user association, instead of selecting a new user and associating, click **De-assign**. The user association is removed and the workstation is free to be associated with any other user.
5. Click **Close**.

Alternatively, you can also re-associate or dissociate the user from the workstation list view page.

1. In the workstation list view page, click the icon displayed in the last column against the workstation whose owner you wish to change. The owner association window opens with the associated user selected by default in the combo boxes.
2. To remove the owner for the workstation, click **De-assign**.
3. To re-associate, select the user name or department name to which you wish to re-associate to the workstation and click **Assign**. In either case, a success message is displayed in the pop-up and simultaneously the workstation list view page is refreshed to display the user name or department name in **Assigned To** column.
4. Click **Close** in the pop-up window.

Viewing Owner Profile

To view the user profile of the user associated with a workstation

1. In the workstation list view page, the user name is displayed in the **Assigned To** column. Click the user name. A pop-up window with the user details opens.
2. Click **Close** in the pop-up window once you have viewed the user details.

Alternatively, you can also view the user details as follows:

1. Click the **Workstation Name** from the workstation list view page.
2. On the top right corner of the center pane, the **User Details** are displayed. Click the user **Name** that is hyperlinked, or click the **View User Profile** link available in the **User details** block on the right side. A pop-up window with the user details opens.
3. Click **Close** in the pop-up window once you have viewed the user details.

E-mail the User

You can e-mail the owner associated with a workstation from the workstation view, only if the owner is an individual user.

1. Click the **E-mail owner** link on the right side of the workstation details page. It opens a pop-up window for sending a mail. The E-mail owner link will be available only if the user has been already associated with the workstation.
2. The **To** field of the form has the e-mail ID of the user. If you wish to send the mail to anyone else other than the user, add the e-mail IDs of the users separated by a comma.
3. Enter a subject for the mail and the content in the **Subject** and **Description** fields respectively.
4. Click **Send E-mail**. A message is displayed above the form if the mail has been sent successfully. If there is a problem, a failure message will be displayed. In such case, please verify if the e-mail settings configured in the admin configuration are correct.

Viewing Workstations Based on Filters

You can view a selected list of workstations by applying various filters on them.

To view workstations list based on **preset filters**

1. Log in to ServiceDesk Plus application using your user name and password.
2. Click the **Inventory** tab in the header pane.
3. Click **View Workstations** link in the **View** block on the left side, or click **Show All** link in the **Workstation** dashboard.
4. Just above the workstation list, you will see the **Filter Viewing:** combo box. From this combo box, you can choose to view either unassigned workstations or all workstations. Using the unassigned list of workstation, easily estimate the number of unassigned workstation and also find out the workstation that can be used for allotment to users of departments.

5. Selecting a domain name in the **Domain** combo box lists the workstations from that domain.

You can also use **advanced filters** to view the workstation list. For advanced filter settings:

1. In the workstation list view page, click the **Advanced Filters** link beside the **Filters Viewing:** combo boxes. The advanced filters options are displayed instead of the simple filter options.

2. The first combo box in the above image lists all the probable workstation attributes based on which you can set the filter criteria. Choose the filter criteria from this.
3. The second combo box gives you options for matching the filter criteria to the search string that you will enter in the text field following it.
4. Click **Filter**. The results matching the filter criteria are displayed.

Deleting Workstations

When a workstation is being disposed, it has to be removed from the inventory list so that there is no wrong association made.

To delete a workstation

1. Log in to the ServiceDesk Plus application.
2. Click the **Inventory** tab in the header pane. If you are already in the inventory module then you can just click the **View Workstations** link in the **Views** block in the left menu. Or from the inventory home, click **Show All** link in the **Workstation** dashboard. The list of discovered workstations is displayed.
3. Select the check box beside the **workstation names** of the workstation that you want to delete from the inventory.
4. Click the **Delete** button available just above the workstation list. A message requesting your confirmation to delete the selected workstations pops up.
5. Click **OK** to go ahead or **Cancel** to drop the deletion.

Searching Workstations

To search specific workstations

1. Log in to ServiceDesk Plus application using your user name and password. On the left bottom of the page, there is a **search** block. In the home page, default selected module is **Requests**.
2. Change the default selection to **workstation** or click the **Inventory** tab in the header pane so that the default selection is changed automatically to workstation.
3. In the **Enter Keyword** text box, type in the workstation name or any other workstation-related details, such as manufacturer, model, OS, processor name, IP address, NIC name, and so on, that you wish to search for. If you do not know the complete information, type in a part of the string.
4. Click **Go** or press the **Enter** key on your keyboard. The search result displays all the workstations that match the search string entered by you.

Viewing the entire Software List

Viewing the Software List

To view the list of software that is discovered during the workstation auditing in your organization

1. Log in to the ServiceDesk Plus application.
2. Click the **Inventory** tab in the header pane.
3. Click **Scanned Software** link in the left menu under the **Views** block.
4. To view the details of an individual software, click the corresponding **Software Name** in the software list view page.

This page lists all the available software in your organization. The list has details, such as software name, software type in which it is classified, the number of licenses purchased, the number of installations made, and the number of licenses available. These details help you in checking for software license compliance and also proactively procure additional licenses of any software, or check for reallocation in advance, as the need may be.

Viewing Filtered Software List

The software can be grouped under various classifications, such as **Managed**, **Excluded**, and **Prohibited**. When you want to track the number of copies of a software in use in your organization, then move the software to the **Managed** software type and track them on a periodic basis.

Excluded software will usually be the list of software that are most commonly available in all the workstations by default. This could include system files, programs that come along with the operating system, and application that need not be tracked.

Any software that is prohibited as per the policy of your organization, can be classified under the **Prohibited** category.

The ones that are not grouped under any of these will be grouped as **Unidentified** or the first time a software is discovered during the workstation auditing, it is classified under the unidentified software type. The asset administrator can then move the software to a different type based on the company policy.

To view a specific classification of software

1. Click the **Inventory** tab in the header pane.
2. Click the **Scanned Software** link in the left menu under the **Views** block.
3. In the center pane, **Filter Viewing:** drop down has the various classifications in which the software are grouped, such as **Excluded**, **Managed**, **Prohibited**, and **Unidentified**. Select any category to view the software categorized under it.

Changing Software Classification

As told earlier, you can classify software identified by the application into managed, excluded, prohibited, and unidentified. When a software is detected by the application during an audit of the workstations, it will, by default, be categorized as **Unidentified**. You can change the software category later.

To change the software classification type

1. In the **Software** list view, select the check box available beside the **Software Name**.
2. From the **Move to:** drop-down menu, select the category to which you want to move the selected software.

Alternatively,

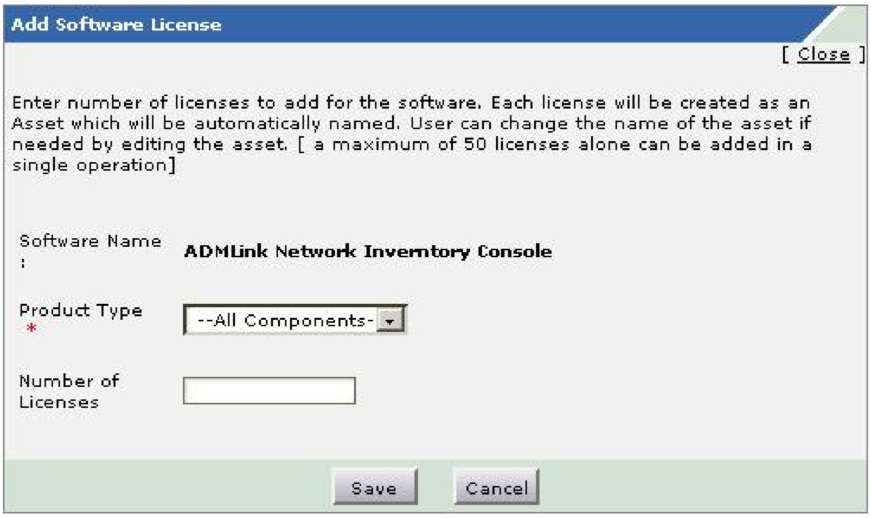
1. From the Software list view, click the name of the software which you want to move to a different classification type.
2. Click the **Change software type** link available on the right side, under the **Actions** block. **Change Software Type** is opened in a separate pop-up with the current type selected by default.
3. Now select the software type you want.
4. Click the **Change** button. The details are updated with the change.

When you change the software type classification, it is reflected across all instances where the software is listed including the workstation details.

Adding Software Licenses

To add software licenses

1. In the software list view page, click the **Software Name** for which you need to add licenses.
2. On the right side, in the **Actions** block, click the **Add software license** link. A Software Licenses adding window opens.



3. From the **product type** combo box, select the product type as software. If the product type has already been selected, then this combo box will not be displayed. Instead, the selected product type will be displayed.
4. Enter the **Number of Licenses** that you want to add. This field can take only numeric values.
5. Click **Save**. A message is displayed with names of the software assets that have been added.

All the licenses added for the software will be listed as separate assets in the asset list and will have a unique asset name associated to each of the license. The maximum number of licenses that you can add in the above form at one time is 50. If you need to add more than 50 licenses of the software, open the **Add Software License** window again and add the rest of the licenses. Continue this process till you have added the required number of licenses.

The number of licenses that you had added in the form will be displayed in the software details page, beside the **Total License** text. The **Available Licenses** lists the remaining licenses to be used to install the software in various workstations. The workstations in which the software is installed are also displayed. To view the details of an workstation, click the name of that workstation.

Viewing Software Installation Details

To view the software installation details, such as workstations where the software is installed, software license compliance, and software type classification

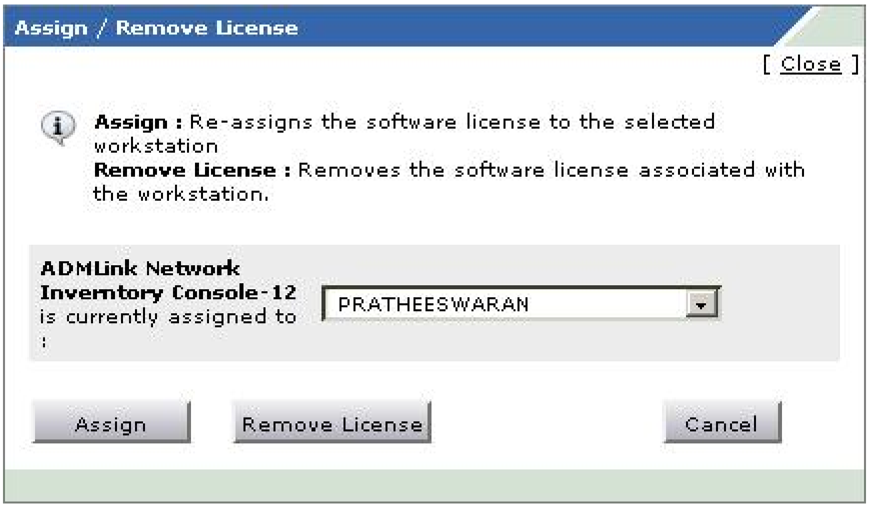
1. In the software list view, click the **Software Name** whose installation details you wish to see. The above-mentioned details are displayed. The top section gives details such as product name, product version, total licenses bought, used licenses, and available licenses. If there is license incompliance, a **License Violation** warning message is displayed. Also, the licensed and unlicensed installations are listed under the respective heads.
2. From here you can also view the details of any workstation in which the software is installed, by clicking the workstation name from the list.

You can convert an unlicensed installation to licensed installation of the software in a particular workstation.

1. In the software details page, under the **Unlicensed Installations** section, select check box beside the workstations for which you wish to allocate software license.
2. Click **Allocate License** button. If the licenses are available, then they will be moved to licensed Installation.

To remove or reassign the software license from licensed installations

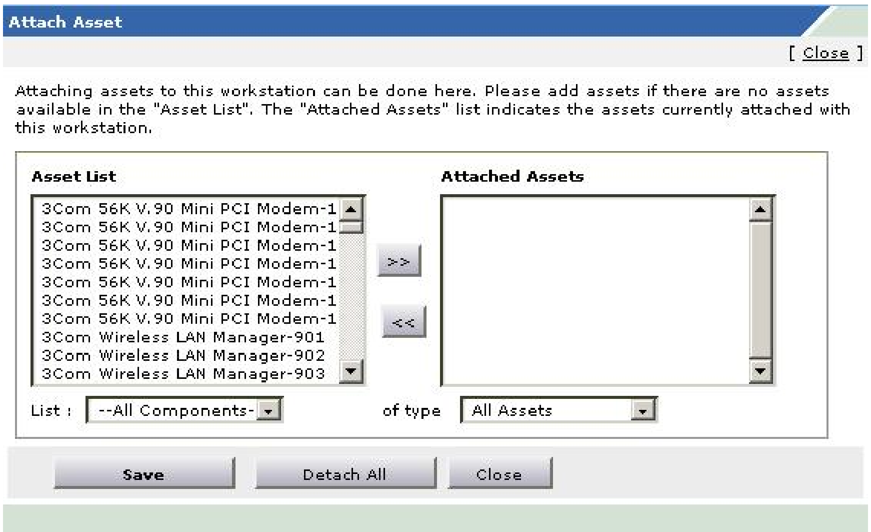
1. In the software details page, under the **Licensed Installations** section, click the icon for the workstation where you wish to remove the software license. The Assign / Remove License window pops up.



2. To reassign, select a different workstation from the combo box and click **Assign**.
3. To remove license, click **Remove License** button. If you do not wish to change anything, just click **Cancel**.

You can attach software assets to the workstation.

1. In the software details view, the unlicensed installations are listed under the corresponding head along the workstation names in which they have been installed.
2. Click the Attach Software Asset to Workstation icon . The attach asset window pops up.



3. From the **Asset List** select the software that you wish to attach to the workstation and click >> button to move it to the **Attached Assets** list. If you want to attach any other software asset, then select those also and move it under **Attached Assets**.
4. Click **Save**.

In the Attach Asset window, you can filter the list of software that appear in the **Asset List** by selecting the specific software component from the combo box available just below the **Asset List**.

Export as PDF

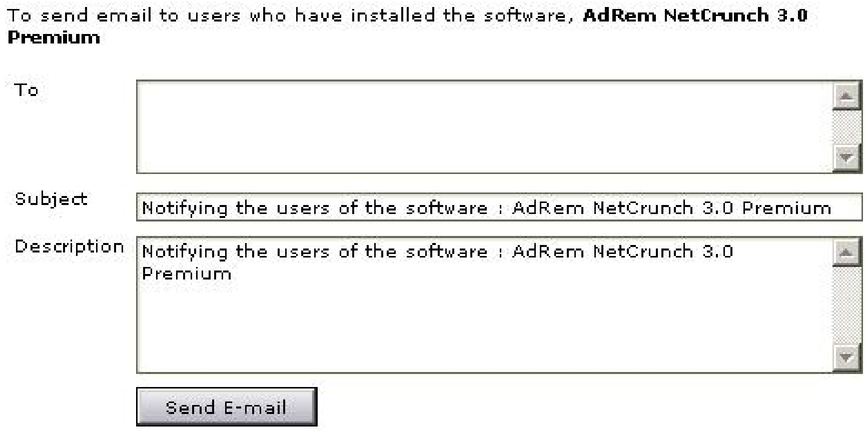
To export the software details as a PDF file

1. In the software list view, click the **Software Name**.
2. On the right side in the Tasks block, click **Export as PDF** link. The PDF file with the software details will be created. A system dialog will open with the choices to save or open the file.
3. Select your option and click **OK**.

E-mail Users

To e-mail the users:

1. In the software list view, click a **Software Name**
2. On the right side in the **Tasks** block, under the **Notification** category, click the **Email Users** link. A pop-up window opens with the mail **To** filled with the e-mail IDs of the users of the software. If there are no users associated with any of the workstations having the software, then you can identify the user to the whom the mail needs to go and enter their e-mail address in the field. The subject and description fields are also pre-filled as in the figure.



3. You can change the details as per your wish.
4. Click **Send E-mail**. A message that the mail is successfully sent is displayed.
5. Click **Close** in the top right corner of the window to close the same.

Searching Software

To search a specific software

1. Log in to ServiceDesk Plus application using your user name and password.
2. On the left bottom of the page, there is a search block. In the home page, default selected module is **Requests**. Change the selection to **Software**.
3. In the **Enter Keyword** text box, type in the software name that you wish to search. If you do not know the complete name, type in a part of the string.
4. Click **Go** or press the **Enter** key on your keyboard. The search result displays all the software that match the search string entered by you.

Viewing the entire Asset List

Viewing the Asset List

Software licenses, PCs, mouse, keyboard, network cables, head sets, memory cards, sound card, and any such IT-related items are termed as **assets**. **Product** is the term used to represent an asset group. For example, Compaq PC is an asset component. This component will have all the Compaq PCs bought by your organization grouped under it. If you have bought 20 Compaq PCs, then each of these PCs will have a unique asset name associated to it and will be grouped under the Compaq PC component. As defined earlier, any IT-related item purchased by your firm is termed as asset. A workstation is a term used to indicate a collection of assets, with a physical location and network address. When a PC asset is allotted to a user in your organization or to a department in your organization for a specific purpose and is given a physical or logical location, it becomes a workstation.

You can track your assets with the help of ManageEngine ServiceDesk Plus application. You can view the list of assets owned by your organization if you have already entered the details into the application.

To view the various assets owned by your organization

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Inventory** tab in the header pane.
3. Click the **Asset Summary** link in the left menu under the **Views** block or click **Show All** link in the Asset dashboard in the inventory home. This displays the **View Assets** page where the various asset product name (and type) are listed along with the number of assets available in each of them.

To view the individual assets under each of the asset components

1. In the **View Assets** page, click on the product name to view the list of assets available in it.
2. In the **Assets** list page, click the **Asset Name** to view/edit the details of the specific asset.

Viewing Assets Based on Filters

You can apply filters at various levels while viewing the assets. The **View Assets** page displays the high level of asset classification, which is the asset product name and type classification. Here you can filter the assets based on the asset **Component Type**. In the **Assets** list view page of each product component, you can apply more filters on the assets that need to be displayed, such as viewing only unassigned assets or not in contract assets. You can apply single or two levels of filters to view the list of assets such as viewing unassigned assets belonging to a particular asset component or not in contract asset belonging to a particular asset component.

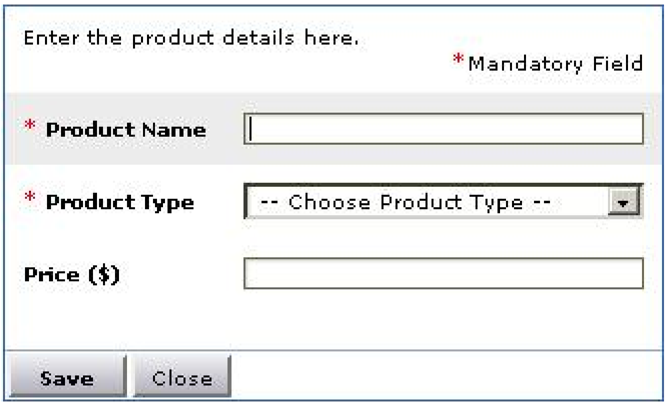
Adding New Asset

Whenever you buy an asset, you can add the asset to the existing list. To add a new asset

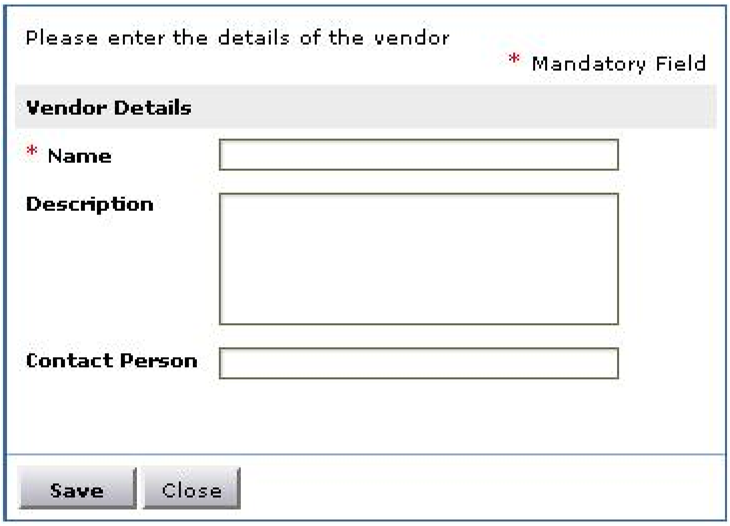
1. Click the **New Asset** link in the header pane below the tabs. The **New Asset** form is displayed and it has two sections: **Asset Details** and **Asset Allocation**. If you have added your own custom fields in the new asset form, then there will be a third block **Additional Asset details**. Alternatively, you can open the **New Asset** form, by clicking the **New** button in the **Assets** list page. The **Product**

Name and the **Asset Name** are mandatory fields in this form. The product name is a combo box with the list of products names available in the application.

2. From the **Product Name** combo box, select the product of your choice. If the product is not available in the list, click **Add new** link available beside it. (This link will be visible only for the administrator).



3. Enter the **Product Name** in the pop-up window.
4. From the **Product Type** combo box, choose the type to which the added product belongs.
5. Enter the **Price** of the product as mentioned by the vendor.
6. Click **Save**. The new product is added and selected. If you have entered the price of the product, then the same will be displayed in the **Asset Cost** field.
7. Enter the **Asset Name**. This needs to be unique and cannot have duplicate values.
8. The other fields, such as **Asset Tag**, **Asset Serial No.**, **Bar Code** of the asset, **Vendor Name**, **Asset Cost** (in $), **Acquisition Date**, and **Expiry Date** are optional. If you have the respective information and wish to maintain those details, then you can enter the same in the form.
9. If the vendor name who supplies the asset is not available in the Vendor Name combo box, click the **Add new** link available beside it (This link will be visible only for the administrator). The **Add New Vendor** window pops up.



10. Enter the name of the vendor, description, and the name of the contact person in the pop-up window.

11. Click **Save**. The added vendor is selected and is displayed in the combo box.
12. Enter the relevant information for the **Additional Asset details** section if it is available.
13. If you want to allocate the asset to a user or department you can do so by entering the required information in the **Asset Allocation** section. This is also an optional section. Choose department or user from the **Allocate To** combo box.
14. The **Owner Name** combo box is filled with the relevant groups of values from which you can choose.
15. Click **Save**. The added asset will be listed.

To add more assets under the same product name, click the **Save and add new** button. This saves the added asset and opens the **New Asset** form with the details of the added asset. Change the required fields and click **Save** when you are done with adding all the assets. The added assets will be listed. You can import assets from a CSV file.

Import Assets from CSV

To import assets from a CSV file

Step 1: Locate the CSV file

1. Click **Import from CSV** link in the **View Assets** page. The **Asset Import Wizard** opens in a pop-up window.
2. Click the **Browse** button in the wizard.
3. Select the CSV file in the file chooser window and click **Open**.
4. Click **Step 2**.

Step 2: Customize Mapping

1. The CSV column names are populated in the select boxes beside each label. Map the ServiceDesk Plus asset details fields with the field names from the CSV file.
2. Click **Step 3**.

Step 3: Import

1. If you wish to update the details of existing assets, then select the check box **If asset already exists, update existing details**. If you do not select it, then the already existing asset data will not be overwritten and only new records will be added.
2. Click **Import Now** button. The values from the CSV file will be imported to the Asset details. Once the import is complete, the data on how many records were added, how many overwritten, and how many failed to import.

If at any point you wish to stop importing from the CSV file, click the **Close** button.

	Note: Asset Name column will be the identifier for Asset, that is, no two assets can have same Asset Name. An asset will be checked for existence depending on the Asset Name value.

Editing Asset Details

To edit the asset details

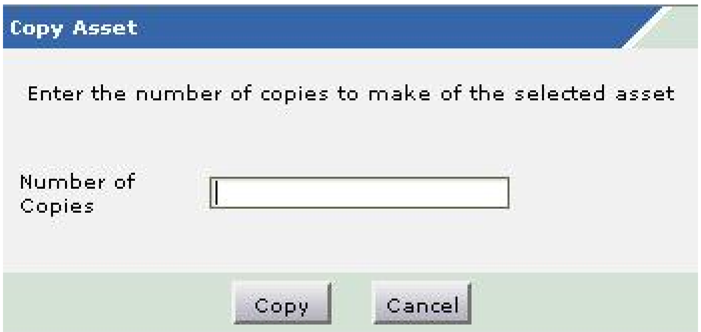
1. In the **View Assets** page, click the **product** name.

2. Click the **Asset Name** in the **Assets** list page. The asset information is displayed in a editable form.
3. Change the values for the various fields in the form. Except for the **Product Name**, you can edit all the other fields in the form.
4. Click **Update**. If you entered wrong information in the form and want to get back to the old details, then instead of **Update** click **Reset**.

Copying Asset Details

To make copies of an asset

1. In the **View Assets** page, click the **product** name.
2. Click the **Asset Name** in the **Assets** list page. The asset information is displayed in a editable form.
3. If you wish to make any changes to the asset information, you can do so. Else, just click the Copy button at the end of the form. The **Copy Assets** window pops up.



4. Enter the number of copies that you wish to make in the field. The maximum asset copies that you can make at a time is 99.
5. Click **Copy**. The required number of copies of the asset are created and the asset name will be of the format <old asset name> - <number>. The number will start from 0. You can view the list of copied assets in the **Assets** page.

You can use this feature to add all the existing assets in the same type where all the details of assets will be retained and at the same time the asset name will still be unique.

Deleting Assets

You can delete assets from the assets list page. To delete assets

1. Click the **Product** name in the **View Assets** page to display the assets list page of that product component.
2. In the **Assets** list view page, select the check box provided beside the asset names that you wish to delete.
3. Click **Delete**. A confirmation message asking whether to continue with deletion or not is displayed.
4. Click **OK** to continue with the asset deletion, or else click **Cancel**. If you click **OK**, the selected assets are deleted from the assets list.

Allocating Assets

To allocate assets to users or associate them with workstations

1. Click the **Product** name in the **View Assets** page to display the assets list page of that product component.
2. In the **Assets** list view page, click the **asset name** which you wish to allocate to a user, or workstation, or department.
3. In the **Edit Asset** form, in the **Asset Allocation** section, select **workstation**, or **user**, or **department** in the **Allocate To** field.
4. In the **Owner Name** field, select the name of the specific owner (workstation name, or user name, or department name).
5. Click **Update**.

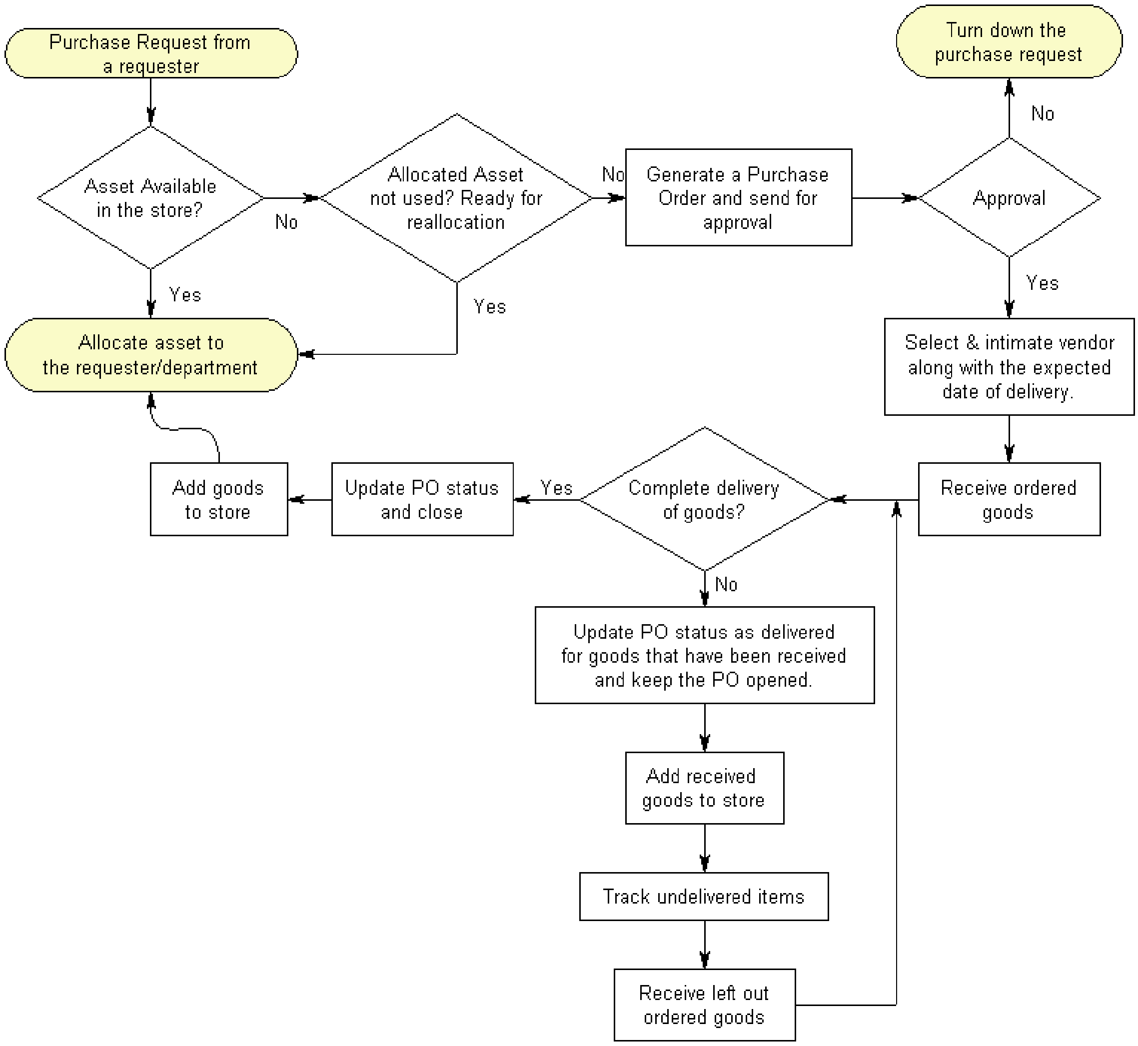
Searching Assets

To search a specific asset

1. Log in to ServiceDesk Plus application using your user name and password.
2. On the left bottom of the page, there is a search block. In the home page, default selected module is **Requests**. Change the selection to **Assets**.
3. In the **Enter Keyword** text box, type in the asset name if you know or type in the asset type such as mouse, if you are looking for a specific mouse.
4. Click **Go** or press the **Enter** key on your keyboard. The search result displays all the assets that match the search string that you entered.

Purchase

The Purchase module streamlines the procurement of required components and allows you to add them as unassigned assets. The Purchase module is tightly integrated with the Inventory. You can configure the vendor-related information and the products supplied by those vendors and their price quotes in ServiceDesk Plus. This information helps in making the choice of vendors while generating the Purchase Order (PO) by comparing the pricing of each vendor. The purchase process starts with a purchase request and is completed when the requested component or item has been purchased and reaches the requester of the purchase request. Below is the workflow that details the various steps involved in a purchase process.



To reach the purchase module, log in to the ServiceDesk Plus application using your user name and password and click the **Purchase** tab in the header pane. You can combine more than one purchase request and create one PO for all these requests.

Creating a New Purchase Order

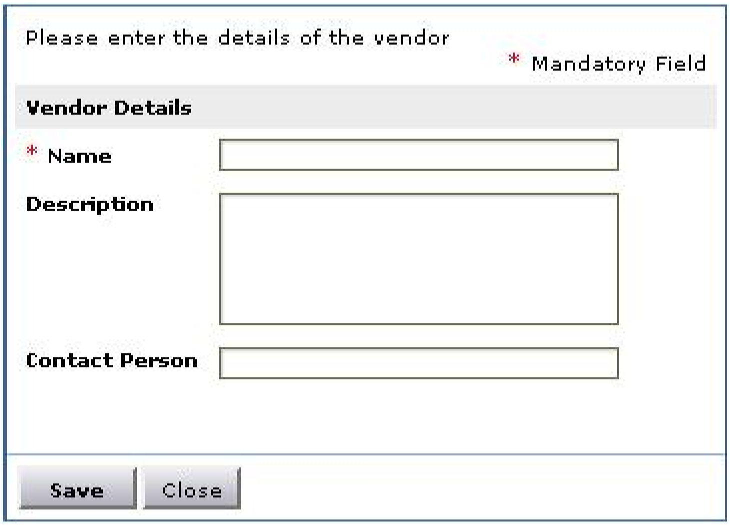
To create a new purchase order

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **New Purchase Order** link available below the tabs in the header pane. The **Add Purchase Order** form is opened.

Step 1 - General Details

There are four steps to create a purchase order. The form opens the first step which collects the general details about the owner of the PO and the vendor to whom the PO is to be sent.

1. The owner, by default is the person who is creating the PO. The **required by** field and the **Vendor** name are mandatory fields.
2. Select the date by which you require the delivery of the goods listed in the PO from the calender that can be invoked by clicking the calender icon .
3. From the drop-down list of vendors, select the vendor of your choice. If the contact details and the phone number are available for this vendor, then those details are automatically fetched in the corresponding fields. You cannot edit these fields. If the vendor is not listed, then click **Add new** link beside the combo box. The **Add New Vendor** window pops up.



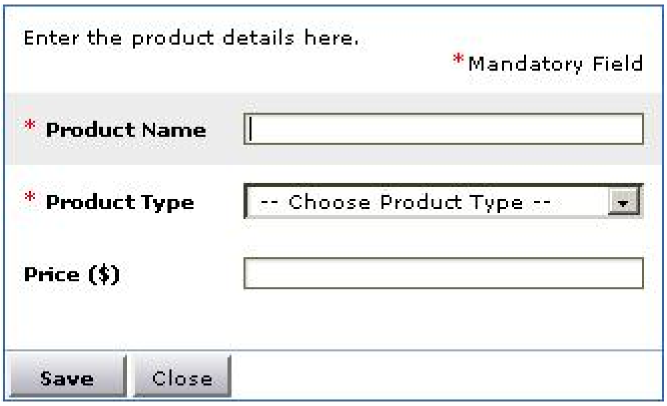
4. Enter the name of the vendor, description, and the name of the contact person in the pop-up window.
5. Click **Save**. The added vendor is selected and is displayed in the combo box.
6. Enter the description for the PO if you want in the **Remarks** field.
7. Click the **Save and Proceed to add items** button. This takes you to the second step in the creation of a PO.

Step 2 - Items

This step has the vendor name displayed below which there are three fields, namely Item Name, Item Cost ($), and Required Quantity. All these three fields are mandatory.

1. The **Item Name** combo box lists all the products supplied by the chosen vendor. From this select, the item for which you wish to place the order. If the price details of this component is already available, then the price will be displayed in

the **Item Cost** field, or else you can enter the same in the **Price** field. If the item of your choice is not available, but is being supplied by the vendor, then click the **Add New** link beside the combo box.



2. Enter the **Product Name** in the pop-up window.
3. From the **Product Type** combo box, choose the type to which the added product belongs.
4. Enter the **Price** of the product as mentioned by the vendor.
5. Click **Save**. The new product gets selected and if you had entered the price of the product, that will also get filled in the **Item Cost** field.
6. Enter the **Required Quantity** of the item.
7. Click **Add Item**. The item is added and is listed just below this block under the **Added Items** heading. This block has the list of items added along with total cost of the ordered items. You can add more items by following steps 1 - 4.
8. If there are any shipping costs involved, enter the same in the editable field beside **Shipping ($)** label in the **Added Items** block.
9. Enter the sales **Tax rate** in the editable field. On adding these information, the **Sales Tax** is calculated and **Total** is modified accordingly.
10. Now if you want to round off the total to the nearest $, then you can enter the necessary round off amount in the **Price Adjustment ($)** field.
11. If you have added any item by mistake or have entered wrong details for the items added, then you can delete the item. To delete the items, click the **delete** icon beside the **Item Name**.
12. Once you are done with adding the items, click **Save and Proceed to Shipping Details**.

Step 3 - Shipping Details

1. Enter the **Shipping Address**.
2. If the billing address is the same as the shipping address, select the check box below the shipping address field. Or else enter the **Billing Address**.
3. Click **Save and Proceed to Preview**.

Step 4 - Preview

The purchase order preview is displayed. It has the details, such as date on which the PO was generated, the date by which the items appearing in the PO are required to be delivered, the owner of the PO, the vendor name, address, phone, fax, contact person at the vendor location, and billing and shipping address in the top half of the PO. The details related to the ordered items are listed in the lower half of the PO. If you had entered any description for the PO in **Step 1 - General**, then that will be displayed beside the **Remarks** label at the bottom of the PO preview.

Click **Save Purchase Order** to go ahead and create the PO. If you do not want to create the PO, then click **Cancel**. On cancellation, a confirmation dialog opens. If you want to cancel the creation of the PO, click **OK**, or else click **Cancel**.

Viewing a Purchase Order

To view purchase orders

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Purchase** tab in the header pane. This displays the list of **outstanding POs**, by default. If you want to see a PO that is in any other state, then you need to choose corresponding state from the **Filter Showing** combo box.
3. From the list of POs, click the **Purchase Order ID** of the PO that you wish to view.

The **View Purchase Order** displays the PO details in different blocks which groups the data in a logical manner. The PO header has the name of your organization and the mailing address. The first block has the general details, such as the P.O. #, date, when the PO was generated, the Owner of the PO, and the date by which the PO needs to be delivered.

Second block provides the details about the vendor, such as the vendor's name, address, phone number, fax, and the name of the contact person at the vendor location. The third block contains the billing address and shipping address to which the invoice needs to sent and the assets needs to be delivered respectively.

Finally, the items are listed along with the cost calculations. The item table lists the item name, price ($) per quantity, quantity ordered, and the total cost for the quantity ordered. Below this table, the cost details for shipping and sales tax are displayed and the final total cost of the PO is also displayed.

If there were any remarks provided for the PO while creating it, they are displayed at the bottom.

Deleting a Purchase Order

To delete purchase orders

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Purchase** tab in the header pane. This displays the list of **outstanding POs**, by default. If you want to delete PO that is in any other state, then you need to choose corresponding state from the **Filter Showing** combo box.
3. Select the check box beside the PO # of the purchase order that you wish to delete, in the list view.
4. Click **Delete**.

You can also delete individual POs by clicking the PO # and entering the PO details view. Now click the **Delete Purchase Order** link available under the Tasks block on the right side of the PO details.

Receiving All Items

Once the PO items have been delivered, you can move the PO from the outstanding state to closed state by clicking the **Receive All Items** link in the **Tasks** block in the **View Purchase Order** page. Perform the following steps:

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Purchase** tab in the header pane.
3. In the list of outstanding POs displayed, click the **Purchase Order ID** for which the items have been delivered.
4. On the right side, under the tasks block, click **Receive All Items**.

This closes the PO and adds all the items present in the PO as unassigned assets. You can view these assets from the asset list of the inventory module.

E-mailing the PO Owner

When some unexpected events happen, the owner of the PO would want to be notified of them. For example, when the purchased items have not been delivered even beyond the required date, the PO owner must be notified of it, so that he can take necessary steps. ServiceDesk allows you to notify the owner of the PO through an e-mail.

To e-mail the PO owner

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click **Purchase** tab in the header pane.
3. In the list of outstanding POs displayed, click the **Purchase Order ID** for which the e-mail notification needs to be sent. If you want to send an email to the owner of a PO in any other state, then choose the corresponding option from the **Filter Showing** combo box.
4. On the right side, under the tasks block, click **Email the Owner**.
5. A **Send Notification** form is opened in a separate window with the **To** address filled with the PO owner's e-mail ID. The **Subject** reads as Notification for **Purchase Order id <number>**.
6. If you want to inform anyone else about the PO details, then you can add their e-mail ID in the **CC** field.
7. Enter the mail content in the **Description** field.
8. Click **Submit**. A message is displayed saying that the e-mail has been sent.
9. Click **Close** to close the window.

Notifying the Vendor

To notify the vendor

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Purchase** tab in the header pane.
3. In the list of outstanding POs displayed, click the **Purchase Order ID** for which the e-mail needs to be sent. If you wish to notify a vendor of a purchase order that is in a different state, then from the **Filter Showing** combo box, select the corresponding filter option, and click the purchase order ID that you need.
4. On the right side, under the tasks block, click **Notify the Vendor**.
5. A **Send Notification** form is opened in a separate window with the **To** address filled with the vendor's e-mail ID. The **Subject** reads as Notification for **Purchase Order id <number>**.
6. If you want to send the same notification to anyone else, then add their e-mail ID in the **CC** field.
7. Enter the mail content in the **Description** field.
8. Click **Submit**. A message is displayed saying that the e-mail has been sent.
9. Click **Close** to close the window.

Searching in Purchase

You can search for purchase orders (POs) with the search in purchase option of ServiceDesk Plus application.

To search for POs

1. Log in to the ServiceDesk Plus application using your user name and password.
2. In the left side, in the **search** block, choose **Purchase** from the **Search in** combo box. If you are in the purchase section, then by default, purchase is selected.
3. In the **Enter Keyword** field, type in your search string. This could either be the vendor name or the requester name.
4. Click **Go** or press the **Enter** key in your keyboard. The search results display all the purchase orders that match the search string.

Contracts

Every organization would maintain an annual maintenance contract with third-party vendors to maintain its infrastructure and function without any major downtime due to bad maintenance of the assets owned by it. ManageEngine ServiceDesk Plus gives you a provision to track such contract details, its date of commencement, and date of expiry, alert you with a reminder in advance about the expiry of the contract, the cost incurred for the purchase and renewal of the contract, the kind of maintenance support provided by the third party vendor, and the third party vendor name with whom the contract has been signed. Any other related documents to the contract can also be maintained along with these details as attachments to the contract. To open the contracts module, log in to the ServiceDesk Plus application using your user name and password and click the **Contracts** tab in the header pane.

Creating a New Contract

To create a new contract for asset:

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **New Contract** link available just below the tabs in the header pane. The new contract form is displayed. This form has three major sections: **Contract Details**, **Contract Rules**, and **Notification Rules**.

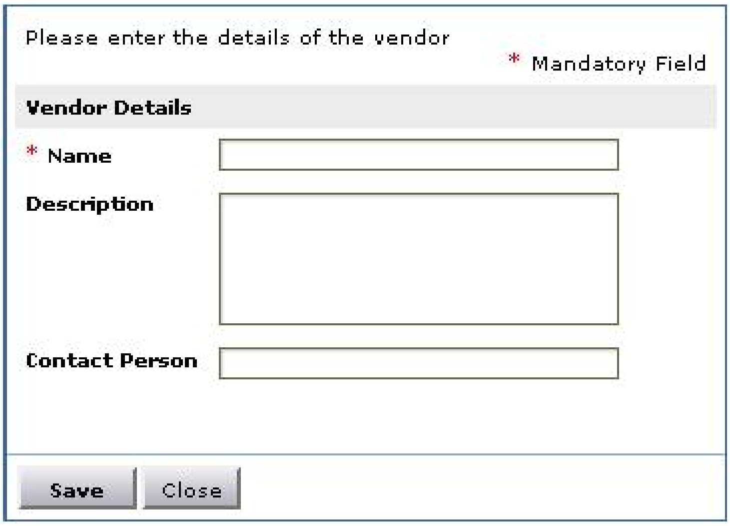
You can also invoke the **New Contract** form from the contracts index page.

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Contracts** tab in the header pane.
3. Click **New Contract** button in the contracts index page.

Choosing a Maintenance Vendor

In the **Contract Details** section, the **Contract Name** and the **Maintenance Vendor** fields are mandatory.

1. Enter a name for the contract in the **Contract Name** field.
2. Below the contract name, enter any **description** for the contract if you wish to.
3. The **maintenance vendor** field is a combo box that lists all the vendor names available. Select the maintenance vendor of your choice from the available list. If the vendor is not listed, then click **Add new** link beside the combo box. The **Add New Vendor** window pops up.



4. Enter the name of the vendor, description, and the name of the contact person in the pop-up window.
5. Click **Save**. The added vendor is selected and is displayed in the combo box.
6. In the **Support** field below it, enter the details regarding the kind of support that will be provided by the vendor to you.

Adding Attachments

The **Contract Details** section has a provision to **add / delete attachments**. You can add files that are related to the contract and are necessary to be maintained and referred to along with the contract information.

To add attachments:

1. Click the **Add / Remove Attachment** link beside the Attachments label. The Add/Edit attachment window is opened.
2. Click the **Browse** button to open the file selector window.
3. Select the file that you wish to add and click the **Attach File** button. The selected file is added and is displayed in the same window just below the file selection field. If you wish to add more than one file then repeat step 2 and 3 till you add all the files that you want. ***The total size of the attachments should not exceed 3 MB.***
4. Click **Done** after attaching all the files.

Choosing the Assets Maintained

In the **Contract Rules** section, you need to choose the assets that are to be maintained under this contract and mention the maintenance period and maintenance cost. To do this:

1. From the **Available Assets** list, select the list of assets that you wish to apply the contract for. Press **Ctrl** or **Shift** keys for multiple selection.
2. Click the **assign** button to move these assets to the **Maintained Assets** list. These assets are covered under the above contract.
3. The **Active period** of the contract is a mandatory field where you need to enter the **From** and **To** date of the contract period. Choose the dates from the calender that can be invoked by clicking the  icon.
4. Enter the maintenance cost in terms of $ in the **Maintenance Cost** field.

Enabling Notification

ServiceDesk enables you to be intimated about the contract expiry well ahead of the expiry date. To enable notification and set the notification rules:

1. Select the check box beside **Enable Notification**. This displays the notification rules information. Here you need to select the technician who needs to be notified about the expiry of the contract and how many days before the expiry, the notification needs to be sent.
2. From the **User List**, select the names of the technicians that you wish to notify.
3. Click the **assign** button to move them to the **Notified User List**.
4. In the **Notify before** field, enter the number of days before which you wish to send the notification to all the selected technicians.
5. Click **Save**.

Viewing a Contract

To view a contract and its details

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Contracts** tab in the header pane. By default, the list of **active** contracts is displayed. If you want to edit a contract detail of a contract that has expired or that is about to expire, then from the **View Contracts of status** combo box, select the corresponding filter option.
3. Click the **Contract Name** that you wish to view.

The **Contract ID** is a unique ID given to the contract during the time of its creation. This is system generated and is used to identify and track the contract uniquely. The contract details are grouped under three major heads: **Contract Details**, **Contract Rules**, and **Notification Rules**. Based on the entries made in the contract during the time of its creation, the details will be displayed in the respective section.

In the **Contract Rules** block, the assets that are maintained under the current contract are displayed. These assets are hyperlinked to display their respective details. Click any of the asset names to open the **Edit Asset** form. Here you can edit the required information and update the same. To know more on editing assets, refer to the Editing Asset Details section.

Editing a Contract

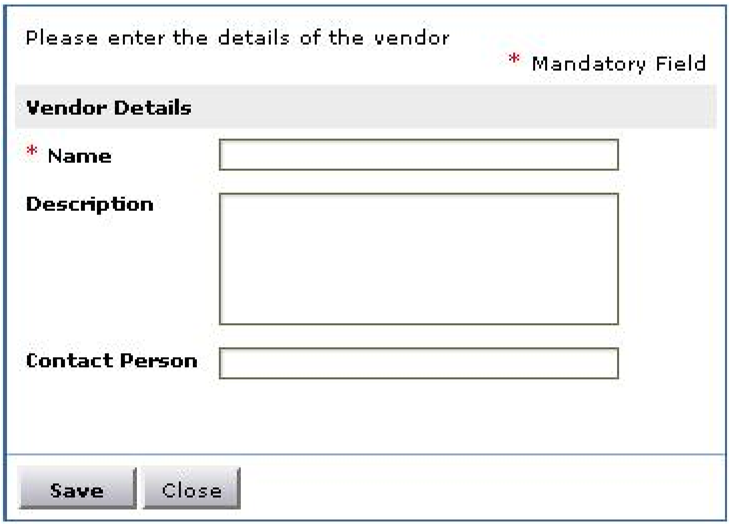
To edit a contract

1. Log in to the ServiceDesk Plus application using your user name and password or using admin login.
2. Click the **Contracts** tab in the header pane. By default, the list of **Active** contracts is displayed. If you want to edit a contract detail of a contract that has expired or that is about to expire, then from the **View Contracts of status** combo box, select the corresponding filter option.
3. Click the **Contract Name** that you wish to edit.
4. In the view contract page, under the tasks block, click **Edit Contract**. The **Edit Contract** form is displayed with the existing details of the contract. As the contract ID is a system generated ID, it is not available in the edit contract form. You can edit all the other details.
5. Once you are done with editing, click **Update**. If you entered wrong information and want to know what the initial values were, then instead of **Update**, click **Reset**.

Renewing a Contract

To renew a contract

1. Log in to the ServiceDesk Plus application using your user name and password or using admin login.
2. Click the **Contracts** tab in the header pane. By default, the list of **Active** contracts is displayed. If you want to edit a contract detail of a contract that has expired or that is about to expire, then from the **View Contracts of status** combo box, select the corresponding filter option.
3. Click the **Contract Name** that you wish to renew.
4. In the view contract page, under the tasks block, click **Renew Contract**. The **Renew Contract** form is displayed with the contract rules of the original contract. As the contract ID is a system generated ID, it is not available in the edit contract form. The contract name is appended with the word **renewed**. You can edit the name but ensure that the contract name is unique and does not have the old name.
5. Enter the Description for the contract.
6. Choose the maintenance vendor from the combo box. If the vendor is not listed, then click **Add new** link beside the combo box. The **Add New Vendor** window pops up.



7. Enter the name of the vendor, description, and the name of the contact person in the pop-up window.
8. Click **Save**. The added vendor is selected and is displayed in the combo box.
9. If you have any information on the type of support, enter the same in the **Support** text area.
10. If there are any documents that you wish to attach to the contract, click the **Add / Remove Attachment** link beside the Attachments label. The Add/Edit attachment window is opened.
11. Click the **Browse** button to open the file selector window.
12. Select the file that you wish to add and click the **Attach File** button. The selected file is added and is displayed in the same window just below the file selection field. If you wish to add more than one file then repeat step 2 and 3 till you add all the files that you want. ***The total size of the attachments should not exceed 3 MB.***

13. Click **Done** after attaching all the files.
14. If you wish to add / remove the assets that are covered under the contract then you can do so. From the **Available Assets** list, select the list of assets that you wish to apply the contract for. Press **Ctrl** or **Shift** keys for multiple selection.
15. Click the **assign** >> button to move these assets to the **Maintained Assets** list. These assets are covered under the above contract. To remove the assets, select the assets in the Maintained Assets list and click the **remove** << button.
16. The **Active period** of the contract is a mandatory field where you need to enter the **From** and **To** date of the contract period. Choose the dates from the calender that can be invoked by clicking the icon.
17. Enter the maintenance cost in terms of $ in the **Maintenance Cost** field.

To enable notification

1. Select the check box beside **Enable Notification**. This displays the notification rules information. Here you need to select the technician who needs to be notified about the expiry of the contract and how many days before the expiry, the notification needs to be sent.
2. From the **User List**, select the names of the technicians that you wish to notify.
3. Click the **assign** button to move them to the **Notified User List**.
4. In the **Notify before** field, enter the number of days before which you wish to send the notification to all the selected technicians.
5. If you wish to notify other about the renewal, then select the check box, **Notify others about this contract renewal**.
6. Select the check box, **Disable all notifications for the old contract**, to disable notifications of the old contract.
7. Click **Save**.

Printing a Contract

To print a contract

1. Log in to the ServiceDesk Plus application using your user name and password or using admin login.
2. Click the **Contracts** tab in the header pane. By default, the list of **Active** contracts is displayed. If you want to edit a contract detail of a contract that has expired or that is about to expire, then from the **View Contracts of status** combo box, select the corresponding filter option.
3. Click the **Contract Name** that you wish to print.
4. In the view contract page, under the tasks block, click **Print Preview**. The contract details are displayed in a printable format in a pop-up window.
5. Click the **Print** button available at the top right corner of the **Contract Print Preview** page. The default printer options are opened.
6. Set the required options and click **OK**. You can collect the printed copy of the contract at the printer that is linked to your workstation.

Viewing Contract Owner Details

By default, the owner of a contract is the person who enters the contract details into the application.

To view the owner details

1. Log in to the ServiceDesk Plus application using your user name and password or using admin login.
2. Click the **Contracts** tab in the header pane. By default, the list of **Active** contracts is displayed. If you want to edit a contract detail of a contract that has expired or that is about to expire, then from the **View Contracts of status** combo box, select the corresponding filter option.
3. Click the **Contract Name** for which you want to know the owner and get the owner's details.
4. In the **View Contract** page, click **View Owner Details**. A **View Owner Details** pop-up window is opened.
5. Click **Close** to close the pop-up.

E-mailing the Contract Owner

By default, the owner of a contract is the person who enters the contract details into the application.

To send an e-mail to the owner

1. Log in to the ServiceDesk Plus application using your user name and password or using admin login.
2. Click the **Contracts** tab in the header pane. By default, the list of **Active** contracts is displayed. If you want to edit a contract detail of a contract that has expired or that is about to expire, then from the **View Contracts of status** combo box, select the corresponding filter option.
3. Click the **Contract Name**.
4. In the **View Contract** page, click **Email the Owner**. A **Send Notification** window opens with the owner's e-mail ID in the **To** field. The subject reads as **Notification for Contract ID <number>**.
5. If you wish to notify about the contents of the e-mail to anyone else also, then enter their e-mail ID in the **CC** field.
6. Enter the e-mail content in the **Description** area.
7. Click **Submit**. A message is displayed saying that the e-mail has been sent successfully.
8. Click **Close**.

Notifying the Vendor

To notify the vendor:

1. Log in to the ServiceDesk Plus application using your user name and password or using admin login.
2. Click the **Contracts** tab in the header pane. By default, the list of **Active** contracts are displayed. If you want to edit a contract detail of a contract that has expired or that is about to expire, then from the **View Contracts of status** combo box, select the corresponding filter option.
3. Click the **Contract Name**.
4. In the **View Contract** page, click **Notify the Vendor**. A **Send Notification** window opens with the vendor's e-mail ID in the **To** field. The subject reads as **Notification for Contract ID <number>**.
5. If you want to send the same notification to anyone else, then add their e-mail ID in the **CC** field.
6. Enter the e-mail content in the **Description** area.
7. Click **Submit**. A message is displayed saying that the e-mail has been sent successfully.
8. Click **Close**.

Searching Contracts

You can search for contracts with the Search in contracts option of the ServiceDesk Plus application.

To search for contracts

1. Log in to the ServiceDesk Plus application using your user name and password or using admin login.
2. In the **search** block, choose **Contract** from the **Search in** combo box. If you are in contracts section, then by default, contract is selected.
3. In the **Enter Keyword** field, type in your search string.
4. Click **Go** or press the **Enter** key in your keyboard. The search result displays all contracts that match the search string.

You can search for contracts based on the contract name, asset names added in the contract, and owner of the contract.

Solutions

The ManageEngine ServiceDesk Plus application provides a facility to record the solutions to the received requests. The recorded solutions function as a knowledge base of solutions. Thus, when you receive a request, refer to the recorded solutions and solve it. This reduces the turnaround time in attending to the requests generated by the requesters and closing the same.

All requesters and technicians who have permissions to view the solutions knowledge base can access this section of the application. The ServiceDesk Plus administrator can assign access privileges to the various technicians for the solutions section. This access privilege can vary from just view only privilege to full control privilege. For setting the access privileges to technicians, refer to the Configuring Technicians and Configuring Roles sections.

Adding a New Solution

The solutions module is a knowledge base with resolutions for various problems encountered by your help desk team. It can have solutions grouped under various topics for ease of locating the corresponding solution. You can add new solutions to the existing knowledge base.

To add new solutions

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **New Solution** link available below the tabs in the header pane or in the Solutions home page that is displayed on clicking the **Solutions** tab in the header pane. This opens the New Solution form that has the fields, **Title**, **Contents**, **Topic**, and **Keyword**. The title, contents, and topic fields are mandatory fields.
3. Enter a title for the solution that you are adding. This can be a summary of the complete solution in one line that will exactly tell what the solution is all about.
4. Now enter the complete solution in the **Contents** text field.
5. The **topic** field is a combo box that lists all the available topics and sub-topics. Select the topic in which you wish to add the current solution.
6. The **keywords** are optional, but the presence of a keyword for the solution will help in improving the search capability and will provide accurate search results. While entering multiple keywords, separate them with comma.
7. To publish the solution in the self-service portal also, select the check box below the keywords test field.
8. Click **Add**. If you do not wish to add the solution then click **Cancel**.

Editing a Solution

To edit a specific solution

1. Click the **Solutions** tab in the header pane, after logging in to the ServiceDesk Plus application using your user name and password. The **Browse By Topics** page is displayed. This page has the topics listed in the top band, **Most Popular Solutions**, and **Most Recent Solutions** just below it. The most popular solutions block lists the solutions with the most number of views in the descending order, that is, the most popular solution on top. The most recent solutions block lists the solutions that have been added recently with the most recent appearing on the top.
2. Click the topic, from the list of the topics, in which the solution you wish to edit is available. All the solutions available under that topic are listed.
3. Click the **Edit** link available beside the solution title name or open the solution by clicking the title and click the **Edit** link available at the top right corner, just below the topic listing in the solution description page.
4. In the **Edit Solutions** page, make the necessary modifications. The title, contents, and the topic under which you wish to place the solution are mandatory fields.
5. Click **Save**. If you want to drop the modifications made, click **Reset**. If you do not want to save the changes and get back to the solutions listing, click **Cancel**.

Alternatively, to open the solution that you wish to edit, type the solution title in the keyword field of the search block and click **Go** or press the **Enter** key. The solutions matching the search string will be listed, from which you can choose the solution and edit by following step 4 and 5.

Deleting a Solution

To delete a specific solution

1. Click the **Solutions** tab in the header pane, after logging in to the ServiceDesk Plus application using your user name and password. The **Browse By Topics** page is displayed. This page has the topics listed in the top band, **Most Popular Solutions**, and **Most Recent Solutions** just below it. The most popular solutions block lists the solutions with the most number of views in the descending order, that is, the most popular solution on top. The most recent solutions block lists the solutions that have been added recently with the most recent appearing on the top.
2. Click the topic in which the solution you wish to delete is available. All the solutions available under that topic are listed. Alternatively, you can also search for the solution using the Search in Solutions feature.
3. Click the **Delete** link available beside the solution title name. A confirmation dialog opens.
4. To continue deleting, click **OK**; or else, click **Cancel**.

Search in Solutions

ManageEngine ServiceDesk Plus allows you to search for solutions using its Search in Solutions option.

To search for solutions

1. Log in to the ServiceDesk Plus application using your user name and password.
2. In the search block, choose **Solutions** from the **Search in** combo box.
3. In the **Enter Keyword** field, type in your search string.
4. Click **Go** or press the **Enter** key in your keyboard. The search results display all the solutions that match the search string.

If you were in the solutions page, then the **Search in** combo box will have **Solutions** selected by default. It is just enough if you type in your search string and click **Go**.

Browsing Solutions by Topic

To browse solutions under individual topics

1. Log in in to ServiceDesk Plus application using your user name and password.
2. Click the **Solutions** tab in the header pane.
3. The **Browse By Topics** page is displayed, where you can see the various topics and their subtopics. Only the first level subtopics are displayed separated by comma. If the number of subtopics are more, then they are truncated with ... symbol.
4. To view all the subtopics, click the topic name and browse.

Alternatively, you can view the solutions by selecting a topic from the combo box available on the top right corner of the **Browse By Topic** block. All the solutions available in that topic are listed in the resulting page.

Managing Topics

You can add new topics, rename an existing topic, and move topics and subtopics to a different parent topic. This provides you the ability to organize your solutions in a logical manner that would meet your organization's needs.

To manage topics

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Solutions** tab in the header pane.
3. In the **Actions** block, click **Manage Topics** or click **Manage Topics** link available in the **Solutions** home page just above the **Browse By Topics** block. The manage topics page is displayed with the available topics and their subtopics listed in the hierarchy. From here you can add, rename, move, and delete topics.

Adding a New Topic

To add a new topic

1. In the **Manage Topics** page, click the **Add New Topic** button. The add new topic form is displayed just above the available topics list with the **Topic Name** and the list of parent topics as the two fields. If there are no topics available then the **Choose a parent topic** field will have the **/Topic Root** alone.
2. Enter the name of the topic in the **Topic Name** field and choose the parent topic under which you want to place the new topic. For example, if you want to add the new topic as a main level topic, choose **/Topic Root** as the parent topic. Or else, choose any other topic as the parent topic.
3. Click **Add**. The topic is added as subtopic to the parent that you chose and is displayed in the available topics list. A message is displayed stating that the new topic is added successfully.

Renaming a Topic

To rename a topic

1. In the **Manage Topics** page, click the **Rename** link in the row of the topic that you wish to rename. The Rename topic form is opened.
2. Type the new name for the topic in the topic name field.
3. Click **Save**.

The changes made to the topic name are displayed in the available topics list and a message is displayed above the list.

Moving a Topic

To move a topic to a different parent

1. In the **Manage Topics** page, click the **Change Parent** link in the row of the topic that you wish to move. The Change Parent Topic form is displayed. In the **Choose the parent topic** text box, by default, the current parent topic of the topic that is to be moved is selected.
2. Select the new parent topic.
3. Click **Save**. If you do not want to move the topic to a different parent topic, then click **Cancel**.

Note: You cannot move a topic as a subtopic to its current child topic itself.

Deleting a Topic

To delete a topic

1. In the **Manage Topics** page, click the **Delete** link in the row of the topic that you wish to delete. A confirmation page opens.
2. Click **Confirm** to delete the topic or click **Cancel** to retain the topic. If you click **Confirm**, then the topic is deleted and a message is displayed stating that the topic is deleted.

When a topic is deleted, by default, the solutions present under the topic are also deleted and if there are any subtopics, then these are moved to the **/Topics Root**. You can later choose to move the topics as child topics to other parent topics. But if you want to override the default actions performed during the delete operation, move the subtopics of the topic which you plan to delete, under a different parent topic of your choice. Also, if you do not wish to delete the solutions that are available under the topic to be deleted, then you can move the solutions to other topics. For this, when you click the Delete link and are led to the confirmation page,

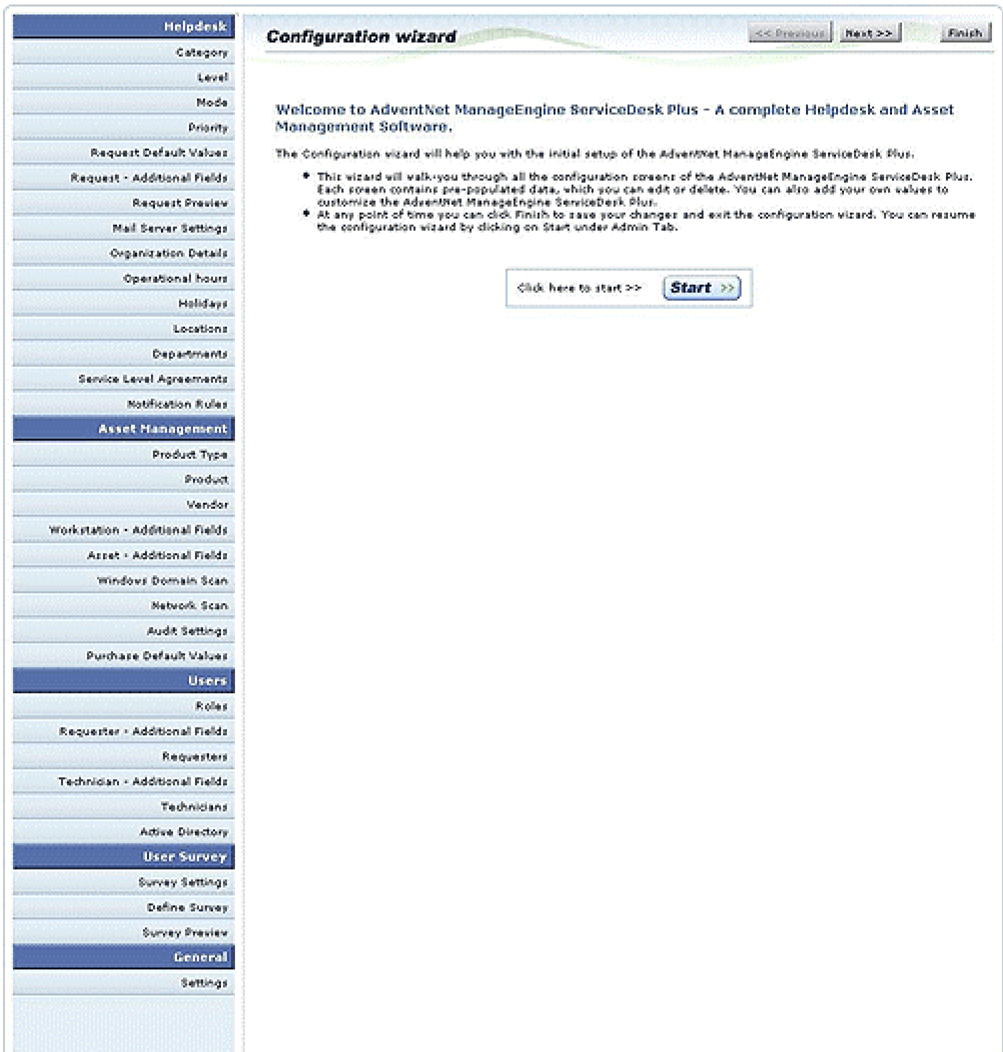
1. Select the check box below the first point. This opens the topic list box, and enables you to move the reference of the solutions of the topic to a different parent topic of your choice.
2. Select the parent topic of your choice from the list box.
3. To move the subtopics to a different parent topic, select the check box below the second point in the confirmation page.
4. In the topic list box, select the parent topic of your choice under which the subtopics of the current parent topic that is being deleted can be moved.
5. Click **Confirm**.

This deletes the topic after moving the solutions and subtopics from the deleted topic to the parent topic you selected.

Note: You cannot move a subtopic of the topic that is going to be deleted, as a subtopic to another child topic of the same parent topic which is going to be deleted.

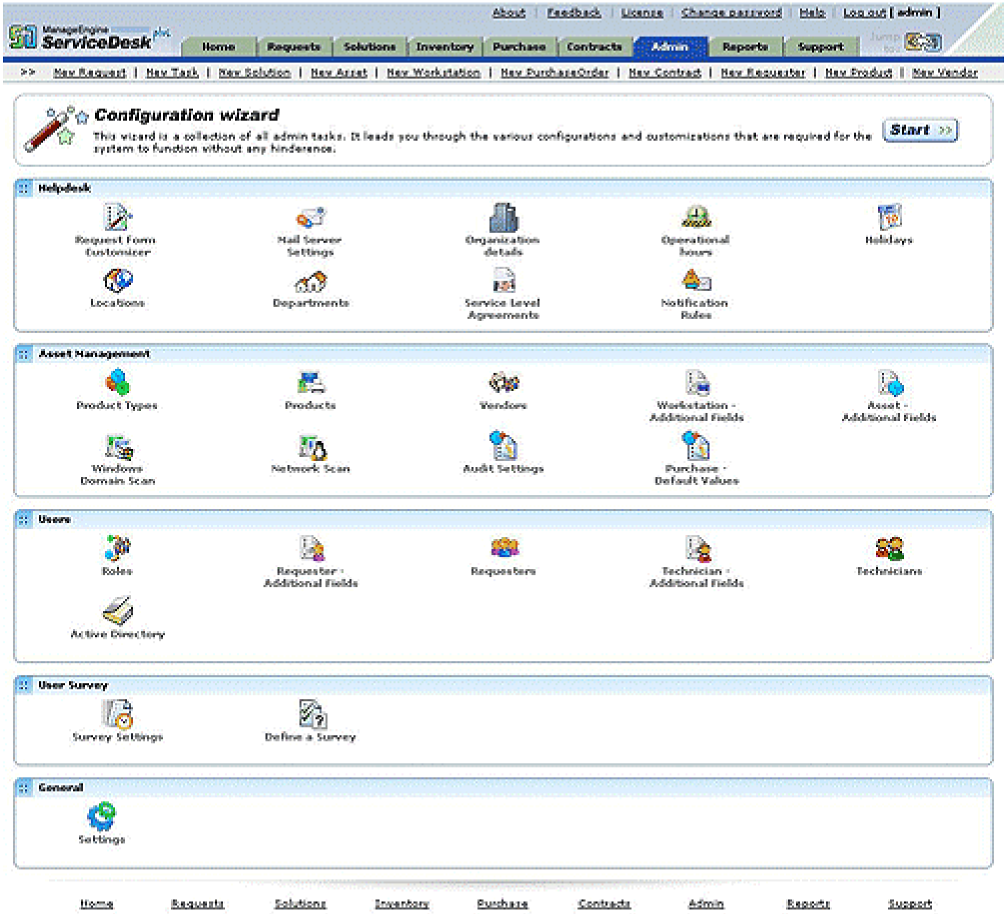
Configurations

In ManageEngine ServiceDesk Plus, all types of application configurations are grouped under **Admin**. To access the various configuration options, log in to the application using the user name and password of an admin user and click the **Admin** tab in the header pane. If this is your first login after installing the ServiceDesk Plus application, then by default, configuration wizard is opened, and the screen displayed would be as below:



To proceed with the configurations, follow the instructions provided in the configuration wizard. There are some default values given for various configurations. If you do not require these values, you can delete them and add your own values to suit your needs either in the wizard itself or at a later time by visiting the corresponding configuration group.

You can exit the configuration wizard at any time. Clicking the **Exit** button closes the configuration wizard and takes you straightaway to the **Admin** Home page, where you can perform all the configurations. The **Admin** page looks as shown below:



The various configurations are grouped under the following major heads:

- Helpdesk Configurations
- Asset Management
- User Management
- User Survey
- General Settings

Each of these configurations is explained in details in the following sections.

Helpdesk Configurations

Various helpdesk related configurations need to be performed by the admin user, before the ServiceDesk Plus request module can be opened for real time functioning of fetching the IT help desk mails and tracking the same. The following helpdesk configurations need to be made for the new request form to capture meaningful information that can help the technicians solve the reported issue faster:

1. Request category
2. Request level
3. Request mode
4. Request priority
5. The default request settings/values for the request form
6. Adding user defined fields that need to appear in the new request form, so as to collect information very specific to your organization

There are other configuration that need be done are:

1. Mail Server settings
2. Organization details
3. Operational hours of the organization
4. Holidays
5. Organizational Locations
6. Departments
7. Service Level Agreements
8. Notification Rules

To access the helpdesk configurations:

1. Login to the ServiceDesk Plus application with the **Username** and **Password** of a ServiceDesk Plus Administrator.
2. Click the **Admin** tab in the header pane.

Request Form Customizer

The new request form can be configured to suit the needs of your organization. It is highly customizable. You can add your own values to be set for the category of the request, priority of the request, level of request, and mode of the request. These will already have some default values in them. If you do not wish to have these then you can delete them and add new values or edit them to suit your needs. You can also add your own custom fields which will be available in the form. These custom fields can be of three types: text field, numeric field, and date field. You can use these to collect organization specific information for getting a better and clearer idea about the reported issue. Finally you can set the default values for the request form fields so that creating and submitting a new request if made easier. The subsequent sections of the document explain in detail the various customizations and configurations that can be done in the request form.

Configuring Category

The requests can be grouped under proper categories. For example, a request to install Adobe Photoshop can be put under the Software request category. Similarly, if there is some problem in the functioning of the mouse, it can be included in the Hardware request category. Depending on the need of your organization, you can create various such categories. These categories, will be listed in the drop-down menu in the **New Request** form.

To open the category configuration page:

1. Log in to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Request Form Customizer** icon . The next page displays the list of request form attributes that can be customized on the left menu and the category list page. You can add, edit, or delete categories.

Add Category

To add a request category:

1. Click the **Add New Category** link available at the right top corner of the **category list** page.
2. In the **Add Category** form, enter the **Category Name**. If you wish, you can enter the category **Description** and also assign the default **Technician** who will be handling the requests submitted in the specified category. Please note that you cannot create two categories with the same **Category Name**.
3. Click **Save**. The new category is added.

If you want to add more than one category, then instead of clicking Save, click **Save and add new** button. This adds the new category and reopens the add category form.

At any point, if you decide not to add the new category, then click **Cancel** to get back to the category list. Clicking the **View List** link on the top right corner of the add category form will also take you to the category list view.

If a particular Category has a default technician associated to it, then when that category is chosen in the request form, the corresponding technician will be selected in the technician field of the **New Request** form.

Edit Category

To edit an existing category:

1. In the **Category List** page, click the **edit** icon beside the category name that you wish to edit.
2. In the **Edit Category** form, you can modify the name of the category, description, and the default technician assigned to the category.
3. Click **Save** to save the changes. At any point, if you wish to cancel the operation that you are performing, click **Cancel**.

Even while editing a category, if you wish to add a new category, then click **Save and add new** button instead of clicking Save button after making the changes.

Delete Category

1. In the **Category List** page, click the delete icon beside the category name that you wish to delete. A confirmation dialog appears.
2. Click **OK** to proceed with the deletion. If you do not want to delete the category, then click **Cancel**.

Configuring Level

Request level is a measure to indicate the complexity of a request. For example, if the received request just has some information and does not require any action to be taken, then it can be classified as Level 1. If there is a minor level action, such as providing the requester some tips to resolve the issue, then it can be classified as Level 2, and so on. To open the request level configuration page:

1. Login to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Request Form Customizer** icon . The next page displays the list of request form attributes that can be customized on the left menu and the category list page.
4. Click **Level** from the left menu, or click the **Next** button on the top of the category list page. The **Level List** page is displayed. You can add, edit, or delete the request levels.

Add Level

To add a request level:

1. In the **Level List** page, click **Add New Level** link at the top right corner.
2. In the **Add Level** form, enter the level **Name**. If you want, you can enter the level **Description** also. Please note that you cannot add two levels with the same name. Each level needs to be unique.
3. Click **Save**. The new level gets added to the already existing list.

If you want to add more than one level, then instead of clicking Save, click **Save and add new** button. This adds the new level and reopens the add level form.

At any point, if you decide not to add the new level, then click **Cancel** to get back to the level list. Clicking the **View List** link on the top right corner of the add level form will also take you to the level list view.

Edit Level

To edit an existing level:

1. In the **Level List** page, click the edit icon beside the level name that you wish to edit.
2. In the **Edit Level** form, you can modify the name and description of the level.
3. Click **Save** to save the changes. At any point, if you wish to cancel the operation that you are performing, click **Cancel**.

Even while editing a level, if you wish to add new level, then click **Save and add new** button instead of clicking Save button after making the changes.

Delete Level

1. In the **Level List** page, click the delete icon beside the level name that you wish to delete. A confirmation dialog appears.
2. Click **OK** to proceed with the deletion. If you do not want to delete the level, then click **Cancel**.

Configuring Mode

There are different modes of submitting a request to the IT help desk team. ServiceDesk Plus provides you the option of submitting the request through an online form. Instead, a requester can call up the IT help desk agent and inform him/her regarding an issue faced, where the help desk agent will ensure to log the details discussed over the phone call through the web-based form. The other mode by which you can submit a request is by sending a mail to the IT help desk team. The IT help desk will then log the details of the mail through the web-based form in the ServiceDesk Plus application. If there are other methods of reporting a request to the IT help desk team in your organization, you can add the corresponding mode. To open the mode configuration page:

1. Login to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Request Form Customizer** icon . The next page displays the list of request form attributes that can be customized on the left menu and the category list page.
4. Click **Mode** from the left menu. The **Mode List** page is displayed. You can add, edit, or delete the request mode.

Add Mode

To add a request mode:

1. In the **Mode List** page, click **Add New Mode** link at the top right corner.
2. In the **Add Mode** form, enter the **Mode Name**. If you want, you can enter the mode **Description** also. Please note that each **Mode Name** needs to be unique.
3. Click **Save**. The new mode gets added to the already existing list.

If you want to add more than one mode, then instead of clicking Save, click **Save and add new** button. This adds the new mode and reopens the add mode form.

At any point, if you decide not to add the new mode, then click **Cancel** to get back to the mode list. Clicking the **View List** link on the top right corner of the add mode form will also take you to the mode list view.

Edit Mode

To edit an existing mode:

1. In the **Mode List** page, click the edit icon beside the mode name that you wish to edit.
2. In the **Edit Mode** form, you can modify the name and description of the mode.
3. Click **Save** to save the changes. At any point, if you wish to cancel the operation that you are performing, click **Cancel**.

Even while editing a mode, if you wish to add new mode, then click **Save and add new** button instead of clicking Save button after making the changes.

Delete Mode

1. In the Mode List page, click the delete icon beside the mode name that you wish to delete. A confirmation dialog appears.
2. Click **OK** to proceed with the deletion. If you do not want to delete the mode, then click **Cancel**.

Configuring Priority

Priority of a request defines the intensity or importance of the request. To open the request priority configuration page:

1. Login to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Request Form Customizer** icon. The next page displays the list of request form attributes that can be customized on the left menu and the category list page.
4. Click **Priority** from the left menu. The next page displays the available list of priorities. You can add, edit, or delete the request priorities.

Add Priority

To add a request priority:

1. In the **Priority List** page, click the **Add New Priority** link at the top right corner.
2. In the **Add Priority** form, enter the **Priority Name** and **Priority Order**. These two are mandatory fields and cannot have duplicate values. If you wish, you can enter the priority **Description** also.
3. Click **Add**. The new priority is added to the already existing list. At any point you wish to cancel the operation that you are performing, click **Cancel**.

Priority order is a number that is associated with the priority name. This defines the order in which the request received by the IT help desk team is to be handled. The requests that have a higher priority order are taken first before the other requests with lower priority are attended to.

If you want to add more than one priority, then instead of clicking Save, click **Save and add new** button. This adds the new priority and reopens the add priority form.

At any point, if you decide not to add the new priority, then click **Cancel** to get back to the priority list. Clicking the **View List** link on the top right corner of the add priority form will also take you to the priority list view.

Edit Priority

To edit an existing priority:

1. In the **Priority List** page, click the edit icon beside the priority name that you wish to edit.
2. In the **Edit Priority** form, edit the fields you want to change.
3. Click **Save** to save the changes. At any point, if you wish to cancel the operation that you are performing, click **Cancel**.

Even while editing a priority, if you wish to add a new priority, then click **Save and add new** button instead of clicking Save button after making the changes.

Delete Priority

1. In the **Priority List** page, click the delete icon beside the priority name that you wish to delete. A confirmation dialog appears.
2. Click **OK** to proceed with the deletion. If you do not want to delete the priority, then click **Cancel**.

Configuring Request Settings

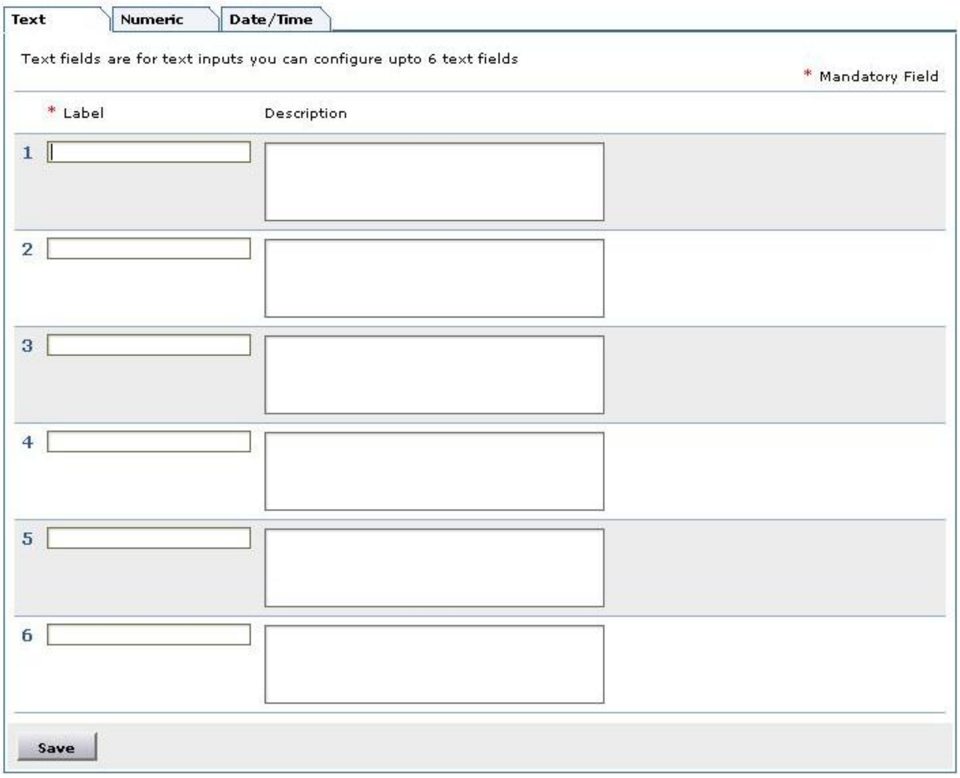
You can set the default values for each of the configuration parameters available in ServiceDesk Plus application for the ServiceDesk Plus request form. These default configurations, once set, will be reflected in the new request form as default values. The requester can change the values while submitting the request. These settings can be changed/modified any time. To configure the request settings:

1. Login to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Request Form Customizer** icon . The next page displays the list of request form attributes that can be customized on the left menu and the category list page.
4. Click **Request Settings** from the left menu. The **Request Settings** page is displayed. You can set the default values for the request status, category, level, mode, and priority.
5. From the **Default Status** combo box select the default status value which you wish to set for every new request. Similarly, choose the values of your choice from each of the combo boxes for the default request category, level, mode, and priority.
6. You can also restrict the list of workstations displayed in the workstation combo box in the new request form of the self-service portal. This list can be set such that only workstations associated with the particular requester posting the request are displayed. To do this, select the check box beside the label, **Show workstations associated to requester in Self-Service Portal**.
7. Click **Save**. This saves the request default settings.

Configuring Additional Fields

Sometimes you may want to capture some additional details about an organization, for which, you need additional fields apart from the default fields in the **New Request** form. You can add your own fields using the **Additional Fields** configuration.

1. Log in to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Request Form Customizer** icon . The next page displays the list of request form attributes that can be customized on the left menu and the category list page.
4. Click **Request -Additional Fields** from the left menu. The next page is a form that allows you to add the field labels and description of the field. You can add three types of fields in the form: text, numeric, and date/time. These three fields are available in three tabs as shown below:



The default tab selected is **Text.**

5. To add the text fields, enter the label name in the form fields below the **Label** heading. If required, enter the description for the field.
6. To add numeric fields, click the **Numeric** tab and then enter the label name in the form fields provided.
7. To add Date/Time fields, click the **Date/Time** tab and enter the required details.
8. Click **Save**. A message is displayed saying that the additional field is successfully created.

The new custom fields that you have added will appear in the **New Request** form under the **Additional Request Details** block.

To delete the user-defined fields, follow the above steps till the 4th step. Then, delete the label names you wish to remove and click **Save**. The respective fields that you deleted will be removed from the **New Request** form.

You can also preview your new request form by clicking the **Request Preview** link in the left menu.

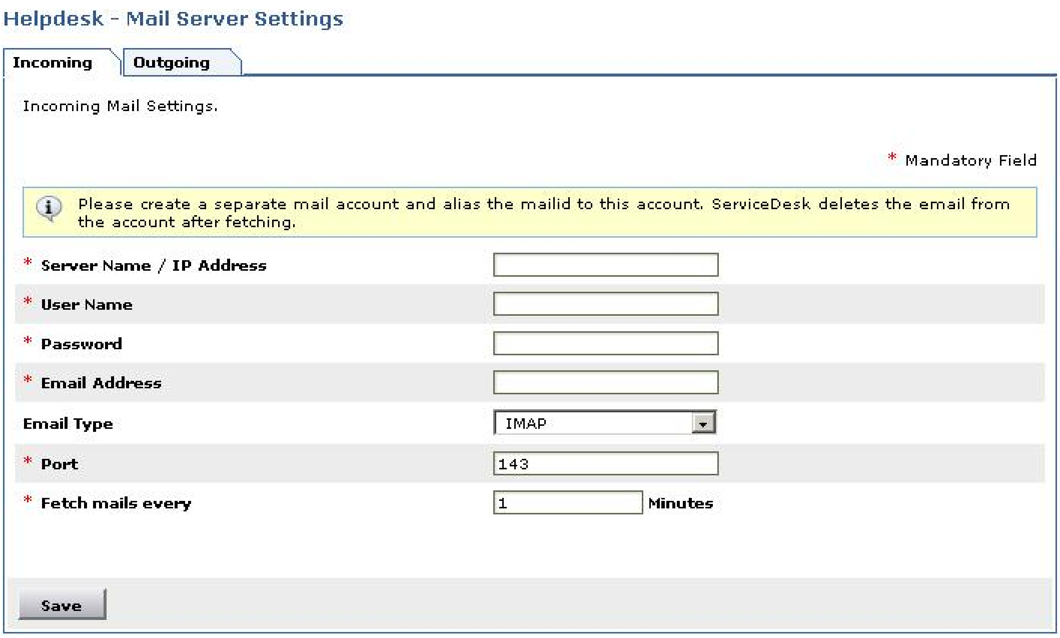
Configuring Mail Server Settings

ServiceDesk Plus allows you to configure the incoming e-mail settings and the outgoing e-mail settings such that it fetches the mails that are sent to the IT help desk team and sends notifications/feedback to the technicians, requesters, and vendors. ServiceDesk Plus Mail Server Settings enables you to do it.

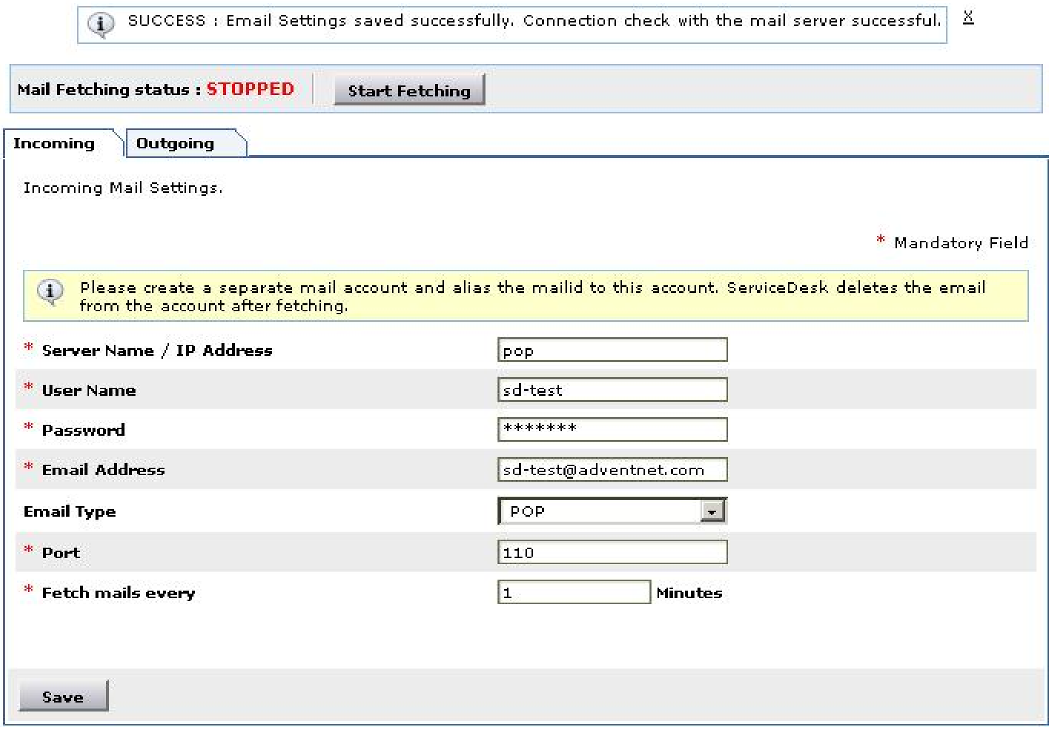
Incoming Mail Settings

To configure the incoming e-mail settings:

1. Log-in to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Mail Server Settings** icon. The **Mail Server Settings** page displayed will be as shown in the figure, with the incoming e-mail settings tab selected by default:



4. All the fields marked * are mandatory fields. Enter the server name, user name, password, e-mail address, port, and the time interval in which the mail needs to be fetched periodically. The time period is in minutes. The e-mail type is a combo box from which you need to select the value.
5. Click **Save**. On successful connection to the server, the success message is displayed and the UI changes as below:



To start fetching the mails, click the **Start Fetching** button. Once the mail fetching is started, the **Save** button in the incoming mail server settings is disabled. If you wish to change any of the settings, then you need to stop mail fetching, make the changes, save them and then restart the mail fetching.

Outgoing Mail Settings

To configure the outgoing mail settings:

1. In the **Email Settings** page, click the **Outgoing** tab. The outgoing mail settings form is displayed.
2. Enter the outgoing mail server name, reply-to e-mail address, and port. These three are the mandatory fields.
3. If there is an alternate server, then enter its name in the Alternate Server Name / IP Address field.
4. Enter the name of the sender in the **Sender's Name** field.
5. Choose the e-mail type, which is usually SMTP.
6. Click **Save**.

Configuring Organization Details

You can configure your organization's details in the ServiceDesk Plus application. This information will be used in various cases. To configure your organization's details:

1. Login to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Organization** icon. The **Organization Details** form is displayed.
4. Enter the **Name** of your organization. You cannot leave the name field empty. The other fields can be empty. But if you have the required information, then enter them as explained in the following steps.
5. The **description** field can contain information about what your organization specializes.
6. The next block collects the **address** of your organization. Enter the address details in the relevant fields, such as address, city, postal code, state, and country.
7. If you have a common contact e-mail ID, then enter the same in the **E-mail ID** field.
8. Enter the phone and fax number, and the URL of your company's web site.
9. Click **Save**.

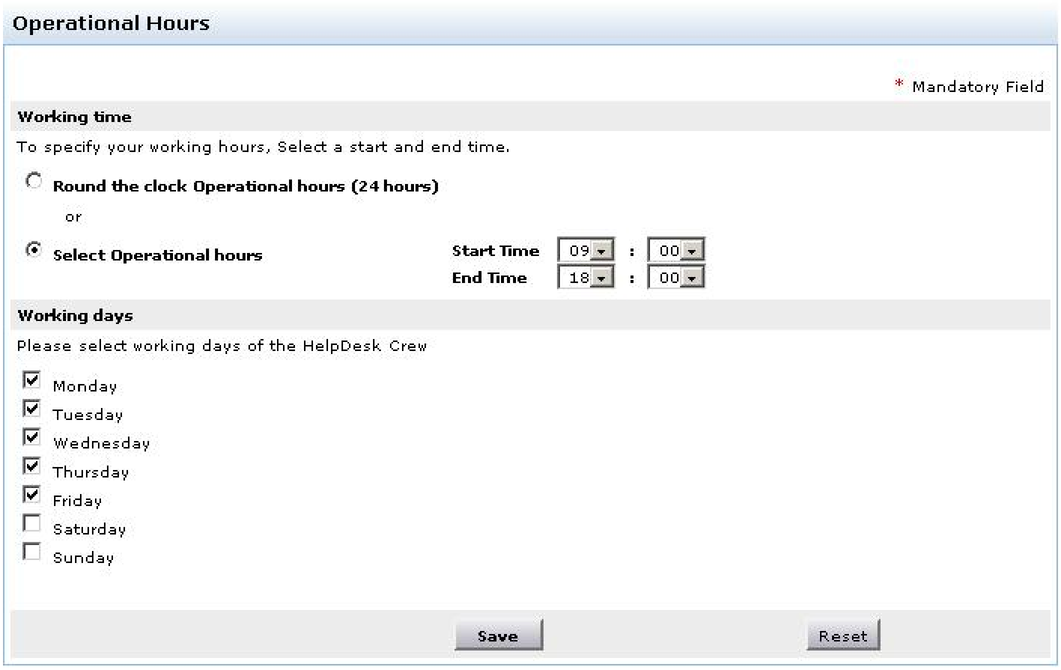
At a later time, if you wish to edit the information that you entered now, you can do so by following the same procedure explained above.

Configuring the Operational Hours

You can set the operational hours of your organization. The operational hours that you configure is used while calculating the request due by date and time. To set the organization's operational hours:

1. Login to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Operational Hours** icon. The **Operational Hours** form is displayed.

Helpdesk - Operational Hours


Operational Hours

* Mandatory Field

Working time

To specify your working hours, Select a start and end time.

Round the clock Operational hours (24 hours)

or

Select Operational hours — Start Time 09 : 00 — End Time 18 : 00

Working days

Please select working days of the HelpDesk Crew

Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday

Save Reset

4. In the above form, set the **Start Time** and **End Time**. This specifies the working hours of your organization. If your organization works 24 hours, then select the **Round the clock Operational hours (24 hours)** radio button.
5. Now, select the days that your organization works by selecting the check boxes provided beside the days of the week.
6. Click **Save**. At any point if you wish not to modify the operational hours, then click **Reset**.

If you have already set the operational hours and now you wish to modify the same, you still need to follow the same procedure as specified above. But in this case, when you click **Operational Hours** from the **Admin Home** page, it will open the **Operational Hours** form with the details that have been set earlier. You can make the necessary modifications and then click on **Save**.

Configuring Holidays

You can set your organizational annual holidays in the ManageEngine ServiceDesk Plus application using the **Holidays** option available in the **Admin** page. This has the list of holidays during which the firm would remain closed and is exclusive of the weekends when the firm does not function. The holiday list is also used while calculating the due-by-time of a request. To open the holiday configuration page:

1. Log-in to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Holidays** icon. The next page displays the available list of holidays. You can add, edit, or delete holidays.

Add Holidays

To add holidays:

1. Click **Add New Holiday** link available at the top right corner of the **holiday list** page.
2. In the **Add Holiday** form, there is a **Date** field where you can select the date using the calender. This is a mandatory field and needs to be selected. If required, you can provide a corresponding **description** about the holiday.
3. Click **Save**.

If you want to add more than one holiday, then click **Save and add new**, instead of clicking Save. This adds the holiday and reopens the add holiday form for you to add more holidays.

At any point, if you do not wish to add the holiday and would like to get back to the holiday list, click **Cancel**. Clicking the **View List** link on the top right corner of the add holiday form will also take you to the holiday list view.

Edit Holidays

1. In the **Holiday List** page, click the edit icon beside the holiday **Date** that you wish to edit.
2. In the **Edit Holiday** form, you can modify the date and description of the holiday.
3. Click **Save** to save the changes. At any point, if you wish to cancel the operation that you are performing, click **Cancel**.

Even while editing a holiday, if you wish to add another new holiday, then click **Save and add new** button instead of clicking **Save** button after making the changes.

Delete Holidays

1. In the **Holiday List** page, click the delete icon beside the holiday **Date** that you wish to delete. A confirmation dialog appears.
2. Click **OK** to proceed with the deletion. If you do not want to delete the holiday, then click **Cancel**.

Configuring Organizational Locations

Organizations can have various branches to handle various specialized activities. Such branches can be located at different locations and data from each of these branches need to be maintained in the same place. You can configure the various locations of your branches in the ServiceDesk Plus application. To open the organization locations configuration page:

1. Login to the ServiceDesk Plus application using user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Locations** icon. The next page displays the available list of locations. You can add, edit, or delete locations.

Add Location

To add a new location:

1. Click **Add New Location** link available at the top right corner of the **location list** page.
2. In the **Add Location** form, enter the **Location Name**. This field cannot be empty. If required, you can provide a corresponding **description** about the location. This can be a brief write-up about the core activities being taken up by that branch.
3. Click **Save**.

If you want to add more than one location, then click **Save and add new**, instead of clicking Save. This adds the location and reopens the add location form for you to add more locations.

At any point, if you do not wish to add the location and would like to get back to the location list, click **Cancel**. Clicking the **View List** link on the top right corner of the add location form will also take you to the location list view.

Edit a Location

To edit an already existing location:

1. In the **Location List** page, click the edit icon beside the **Location Name** that you wish to edit.
2. In the **Edit Location** form, modify the location name and its description.
3. Click **Save** to save the changes. At any point, if you wish to cancel the operation that you are performing, click **Cancel**.

Even while editing a location, if you wish to add another new location, then click **Save and add new** button instead of clicking **Save** button after making the changes.

Delete Locations

1. In the **Location List** page, click the delete icon beside the **Location Name** that you wish to delete. A confirmation dialog appears.
2. Click **OK** to proceed with the deletion. If you do not want to delete the location, then click **Cancel**.

Configuring Organizational Departments

There can be various departments in an organization and each of these departments have a group of employees in them. These employees will own various resources of the organization. In ServiceDesk Plus you can add, edit, or delete the various departments of your organization. These departments are used while adding requesters and technicians; each requester will be associated to a particular department of the organization. To open the department configurations:

1. Login to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Departments** icon. The next page displays the available list of departments. You can add, edit, or delete departments.

Add Department

To add a department:

1. Click **Add New Department** link available at the top right corner of the **department list** page.
2. In the **Add Department** form, enter the **Department Name**. This field cannot be empty. If required, you can provide a corresponding **description** about the department. Also choose the **location** of the department.
3. Click **Save**.

If you want to add more than one department, then click **Save and add new**, instead of clicking Save. This adds the department and reopens the add department form.

At any point, if you do not wish to add the department and would like to get back to the department list from the add department form, click **Cancel**. Clicking the **View List** link on the top right corner of the add department form will also take you to the department list view.

Edit Department

To edit an existing department:

1. In the **Department List** page, click the edit icon beside the **Department Name** that you wish to edit.
2. In the **Edit Department** form, you can modify the department name, its description, and location.
3. Click **Save** to save the changes. At any point, if you wish to cancel the operation that you are performing, click **Cancel**.

Even while editing a department, if you wish to add another new department, then click **Save and add new** button instead of clicking **Save** button after making the changes.

Delete Departments

1. In the **Department List** page, click the delete icon beside the **Department Name** that you wish to delete. A confirmation dialog appears.
2. Click **OK** to proceed with the deletion. If you do not want to delete the department, then click **Cancel**.

Configuring Service Level Agreements

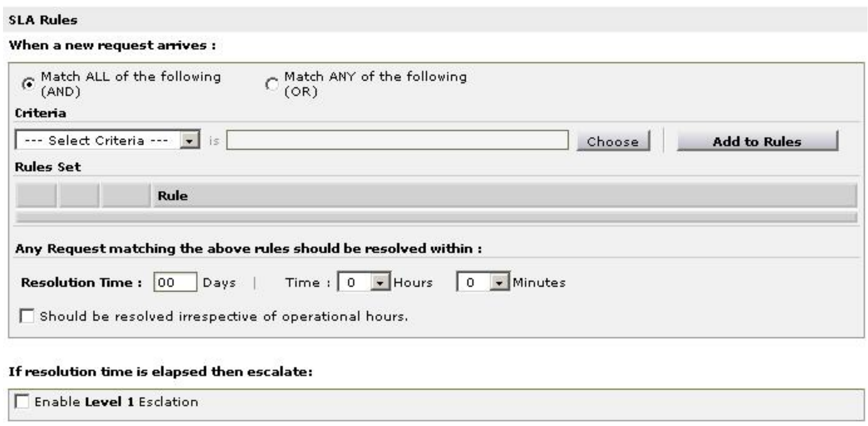
You can have service level agreements (SLAs) defined for intra-organization service provided by the IT help desk team. These SLAs help evaluating the efficiency, effectiveness, and responsiveness of your help desk team. The SLAs can be defined for each individual, or departments, or workstations. When requests from any of the three that are governed by an SLA is received by the application, the priority is automatically set based on the SLA rules. Also, if the request is not resolved within the time specifications of the SLA, then you can set the escalation rules also. To open the SLA configurations page:

1. Login to the ServiceDesk Plus application with admin username and password.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Service Level Agreement** icon . The resulting page will display the available list of SLAs. You can add, edit, or delete SLAs.

Add New Service Level Agreement

To add an SLA:

1. Click **Add New SLA** link available at the top right corner of the **SLA list** page.
2. In the **Add SLA** form, enter the **SLA Name**. This field cannot be empty.
3. If required, you can provide a corresponding **description** for the SLA.
4. In the SLA rules block set the rules and criteria for the SLA. By default, the radio button **Match ALL of the following is selected**. If you do not want all of them to be checked but if it is enough if any one of the rules are matched, then select the radio button **Match ANY of the following**.



5. Now, set the criteria by selecting from the **Select Criteria** combo box, and then choose the individual values that need to be matched by clicking on the **choose** button. This will open the values from the database for that particular parent criteria that you chose from the combo box. Choose the values you want and click **Select**. For example, if you want to match the requester name John, then select **Requester Name** in the combo box. Now click **Choose** button, to open the list of requesters in a pop-up window. Select the requester name from the list and click **Select**. For multiple selection, press **Shift** or **Ctrl** key while selecting the names. The selected names will appear in the text field just before the choose button.
6. Click **Add to Rules** to add the defined rule to the **Rules Set**.

7. Set the **Resolution Time**. If you want this duration to override the operational hours, the select the check box beside **Should be resolved irrespective of operational hours**. By selecting this, you will be overriding the operational hours of your organization and the due by time will be calculated from the creation time without taking into consideration the holidays and operational hours.
8. If the request is not resolved within the specified resolution time, then you can set the escalation levels for notification. If you want to set the escalation levels, then select the check box available beside the **Enable Level 1 notification**. The level 1 notification expands.

9. Click **Choose** button to open the list of available technician names in a pop-up window.
10. Choose the list of technicians to whom the escalation notification needs to be sent, and click **Select**.
11. Set the time after which the escalation must be done. Similarly, you can set 4 levels of escalations.
12. Click **Save** once you are done with all the above.

If you want to add more than one SLA, then click **Save and add new**, instead of clicking Save. This adds the SLA and reopens the add SLA form.

At any point, if you do not wish to add the SLA and would like to get back to the SLA list from the add SLA form, click **Cancel**. Clicking the **View List** link on the top right corner of the add SLA form will also take you to the SLA list view.

The SLAs escalations are enabled by default. If you want to disable SLA escalations, click the **Disable Escalation** button in the **SLA List** view.

Edit Service Level Agreement

To edit an existing SLA:

1. In the **SLA List** page, click the edit icon beside the **SLA Name** that you wish to edit.
2. In the **Edit SLA** form, you can modify all the fields mentioned in the add SLA form.
3. To edit the **Rules Set**, click the edit icon beside the individual rule. The respective selection window is opened in a separate pop-up. You can choose more values or remove a few values by deselecting them.
4. You can also delete a rule completely. To delete a rule, click the delete icon beside the individual rule.
5. Iin the escalations, you can add or remove technician names from the **Escalate to** text field. Click **Choose** button and in the pop-up select or deselect names.
6. Click **Save** to save the changes performed. At any point you wish to cancel the operation that you are performing, click **Cancel**.

Even while editing an SLA, if you wish to add another new SLA, then click **Save and add new** button instead of clicking **Save** button after making the changes.

Delete Service Level Agreement

1. In the **SLA List** page, click the delete icon beside the **SLA Name** that you wish to delete. A confirmation dialog is opened.
2. Click **OK** to proceed with the deletion. If you do not want to delete the SLA, then click **Cancel**.

Organize Service Level Agreements

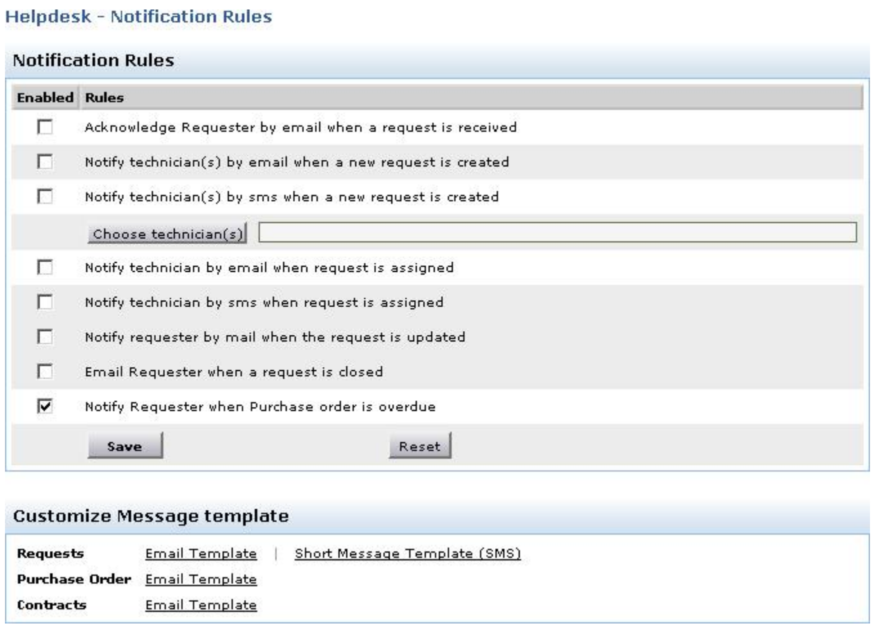
You can organize the SLA to appear in a particular order in the list view by following the steps below:

1. Click **Organize SLA** link available above the list of SLAs in the **SLA List** view. A pop-up window is opened with the list of available SLAs in the order that is appearing the list view.
2. Select an SLA, and click **Move up** or **Move Down** button beside the list.
3. Click **Save**.

Configuring Notification Rules

ManageEngine ServiceDesk Plus allows you send notifications to requesters, technicians, and vendors. The notifications can be of two types: e-mail and SMS. These notification modes can be set across various modules of the application, such as requests, purchase, and contracts. There may be some default actions that you might want to perform when the state of any item changes. These default configurations can also be defined. To set the notification rules and the message template:

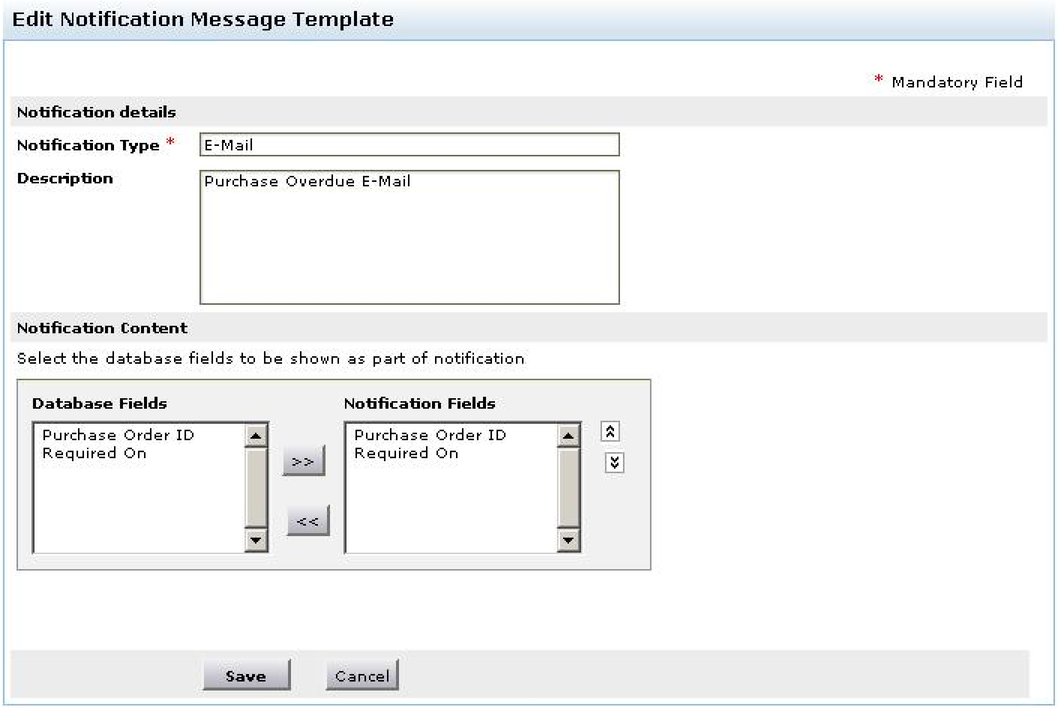
1. Login to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Notification Rules** icon . The resulting page is as below:



4. To enable or disable any of the notification rules, select or deselect the check box beside each of the rules.
5. You can also choose the technician(s) who need to be notified when a new request is created. For this, click **Choose Technician(s)** button. The list of technicians is displayed in a pop-up window.
6. Select the technicians. For multiple selections, press **Shift** or **Ctrl** key and then select the technicians.
7. Click **OK**. The selected technicians get listed in the text box beside the **Choose technician(s) button**.

To customize the message template for notification

1. Click the **Email Template** link beside module (Requests, Purchase Order, and Contracts) for which you want to customize. The **Edit Notification Message Template** form is displayed.



2. The **Notification Type** field is non-editable. You can edit the **description** of given for the notification type.
3. In the **Notification Content** block, you can choose the database fields that need to be a part of the notification. From the **Database Fields** list, choose the fields that you wish to send as a part of the notification and click the >> button. If you wish to remove some fields from the notification content, then select those fields from the **Notification Fields** list and click the << button.
4. Click **Save**.

For the request module alone, SMS notification is possible and hence for this, you can edit the SMS Notification Template also. For this you need to click **Short Message Template (SMS)** link instead of **Email Template** link in step 1. The remaining steps are the same from then on.

Asset Management

The inventory module of the ServiceDesk Plus application enables you to keep track of the various assets available in your organization and their corresponding usage and availability. It also helps you monitor your assets online in any of the networks in your firm. This helps you in proactively planning your resource allocation and purchases. Before you start using the inventory module, you have to configure the inventory-related information. The inventory-related configurations are:

1. Product Types details
2. Products
3. Vendors information
4. Workstation - Additional Field
5. Asset Additional Field for new asset form
6. Scan for Windows PCs
7. Scan for Linux PCs
8. Audit Settings
9. Purchase - Default Values

To access the inventory-related configurations:

1. Log in to the ServiceDesk Plus application using the **user name** and **password** of a ServiceDesk Plus administrator.
2. Click the **Admin** tab in the header pane. The Asset Management block is just below the helpdesk block.

Configuring Product Types

Each product purchased by a firm can be categorized into a specific product type. This is the high-level categorization for the assets that are bought. For example, Adobe Photoshop or Macromedia Flash can be categorized under the product type Software, while HP Inkjet Printer can be categorized under the product type Printer. In general, product type is a parent category under which you can group each of the specific assets owned by your firm. Proper categorization helps in estimating how much has been spent for purchasing each of the product type assets (Printer, Scanners, etc.), how much assets in each of the product types are available in the organization and so on.

To open the product type configuration page:

1. Log in to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Asset Management** block, click the **Product Types** icon. The next page displays the available list of product types. You can add, edit, or delete product types.

Add Product Types

To add product types:

1. In the **Product Types List** page, click **Add New Product Type** link available at the top right corner.
2. In the **Add Product Type** form, enter the **Product Type Name**. This name needs to be unique and this field cannot be blank.
3. If required, add relevant **Description** for the product type.
4. Click **Save**.

If you want to add more than one product type, then instead of clicking Save, click **Save and add new** button. This adds the new product type and reopens the add product type form after displaying a message that the a new product type is added.

At any point, if you decide not to add the new product type, then click **Cancel** to get back to the product type list. Clicking the **View List** link on the top right corner of the add product type form will also take you to the product type list view.

Edit Product Type

To edit an existing product type:

1. In the **Product Types List** page, click the edit icon beside the **Product Type Name** that you wish to edit.
2. In the **Edit Product Type** form, you can edit the product type name and the description.
3. Click **Save**. At any point, if you wish to cancel the operation that you are performing, click **Cancel**.

Even while editing a product type, if you wish to add new product type, then click **Save and add new** button instead of clicking **Save** button after making the changes.

Delete Product Types

To delete a product type:

1. In the **Product Types List** page, click the delete icon beside the **Product Type Name** that you wish to delete. A confirmation dialog is opened.
2. Click **OK** to proceed with the deletion. If you do not want to delete the product type, then click **Cancel**.

Configuring Products

The specific asset types are termed as products. For example, Dell Lattitude D600 is a product representing Dell Laptops. These products need to be added in the application so that they can be used while referencing from the various modules of the application, such as Inventory and Purchase. As and when you purchase any specific product belonging to a new asset type, you need to add the new product. Also, if a product needs to be discarded you can also remove it from the list by deleting the details of the same.

To open the product configuration page:

1. Log in to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Asset Management** block, click the **Products** icon. The next page displays the available list of products. You can add, edit, or delete product.

Add Product

To add products:

1. In the **Product List** page, click **Add New Product** link available at the top right corner.
2. In the **Add Product** form, enter the **Product Name**. This field cannot be blank.
3. If you know the manufacturer of the product, enter the same in the **Manufacturer** field.
4. From the **Product Type** combo box choose the product type under which you wish to classify the product that you are adding.
5. Enter the **Part No.** of the product.
6. If required, add relevant **Comments** for the product.
7. Click **Save**. A message is displayed and the product is added. Simultaneously, a **Vendors** tab is also added. This tab is to give a vendor association to the product.
8. Click the **Vendor** tab.
9. Click the **Associate Vendor** button.
10. In the Associate Vendor form, choose the **vendor name** from the combo box provided and enter the **price** of the product. These are the two fields that are mandatory.
11. If you know the warranty period of the product, enter it in the **Warranty Period** by choosing the number of years and months from the combo box.
12. Choose the **maintenance vendor**.
13. If you wish to add any **comments**, add it in the **Comments** text box.
14. Click **Add**. The page is refreshed to display the vendor association information. Repeat the steps 9 - 14, till you have added all the vendors who supply this product.

If you do not wish to associate the vendor now, then click **Cancel**. It goes back to the **Product Details** tab.

If you wish to add more than one product, then in step 7, instead of clicking Save, click **Save and add new button**. This would add the product and open the add product form for you to add more products. In this case, the product vendor association needs to be done later. To get back to the product list page without adding the product or after completing the vendor product association, click **View List** link at the top right corner of the **Add Product** form.

Edit Product

If you have added the product without associating the vendor with the product, then you will have to associate the vendor by editing the product information.

To edit the product information:

1. Click the edit icon beside **Product Name** in the **Product List** page.
2. In the **Edit Product** form, you can edit all the form fields mentioned in the add product procedure.
3. Click the **Vendor** tab and click the **Associate Vendor** button.
4. Edit the required fields and click the **Add** button.

Even while editing the product information, if you wish to see the product list page, click the **View List** link at the top right corner of the **Edit Product** form. Also if you want to add a new product, then in the product details tab, click **Save and add new** button.

Delete Product

To delete a product, it is necessary that the product vendor association is first removed and then the product is deleted. Also ensure that the particular product is not used elsewhere. Follow the steps below to delete a product:

1. In the **Product List** page, click the edit icon beside **Product Name**.
2. Click the **Vendors** tab.
3. Click the delete icon beside the **Vendors**. A confirmation dialog is opened.
4. Click **OK** to proceed with the deletion. Delete all the vendor associations of the product.
5. Click **view list** link on the top right corner of the center pane.
6. Now, click the delete icon beside the **Product Name** for which you removed the vendor association. A confirmation dialog is opened.
7. Click **OK** to proceed with the deletion. If you do not wish to delete the product, click **Cancel**.

Configuring Vendors

An organization can have business contacts with more than one vendor for buying the various resources of the organization. It is very essential for the firm to keep track of its vendors and the products supplied by these vendors. To configure these details, you can use the configuring vendors option available in the admin page.

1. Log in to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Asset Management** block, click the **Vendors** icon. You can add, edit, or delete vendors.

Add Vendors

To add vendors:

1. In the **Vendor List** page, click **Add New Vendor** link available at the top right corner.
2. In the **Add Vendor** form, enter the **Vendor Name**. This name needs to be unique and this field cannot be blank. All the other fields are optional.
3. Enter relevant **Description** for the vendor.
4. Enter the **Contact Name** at the vendor location.
5. Enter the **address** details of the vendor in the respective fields.
6. Enter the vendor e-mail ID, phone, fax, and web URL.
7. Click **Save**. A message is displayed and the vendor is added. Simultaneously, a **Products** tab is also added. This tab is for adding the list of products that are supplied by the vendor.
8. Click the **Products** tab.
9. Click **Associate Product** button.
10. In the associate product form, choose the **product name** from the combo box and enter the **price** of the product. These are the two fields that are mandatory.
11. If you know the warranty period of the product, enter it in the **Warranty Period** by choosing the number of years and months from the combo box.
12. Choose the **maintenance vendor** from the combo box.
13. If you wish to add any comments, add it in the **Comments** text box.
14. Click **Add**. The page is refreshed to display the product association information. Repeat the steps 9 - 14, till you have added all the products supplied by this vendor.

If you do not wish to add the product list after opening the associate product form, then click **Cancel**. It goes back to the **Vendor Details** tab.

If you wish to add more than one vendor, then in step 7, instead of clicking Save, click **Save and add new button**. This would add the vendor and open the add vendor form for you to add more vendors. In this case, the product list needs to be added later. To get back to the vendor list page without adding the vendor or after adding the list of product supplied by the vendor, click **View List** link at the top right corner of the **Add Vendor** form.

Edit Vendor

If you have added the vendor without adding the product list, then you have to add the list of product supplied by the vendor only by editing the vendor information.

To edit the vendor information:

1. Click the edit icon beside **Vendor Name** in the **Vendor List** page.
2. In the **Edit Vendor** form, you can edit all the form fields mentioned in the add vendor procedure.
3. Click the **Products** tab to add the list of products supplied by the vendor and follow the steps 9 through 14 in add vendors.

Even while editing the vendor information, if you wish to see the vendor list page, click the **View List** link at the top right corner of the **Edit Vendor** form. Also if you want to add a new vendor, then in the vendor details tab, click the **Save and add new** button.

Delete Vendors

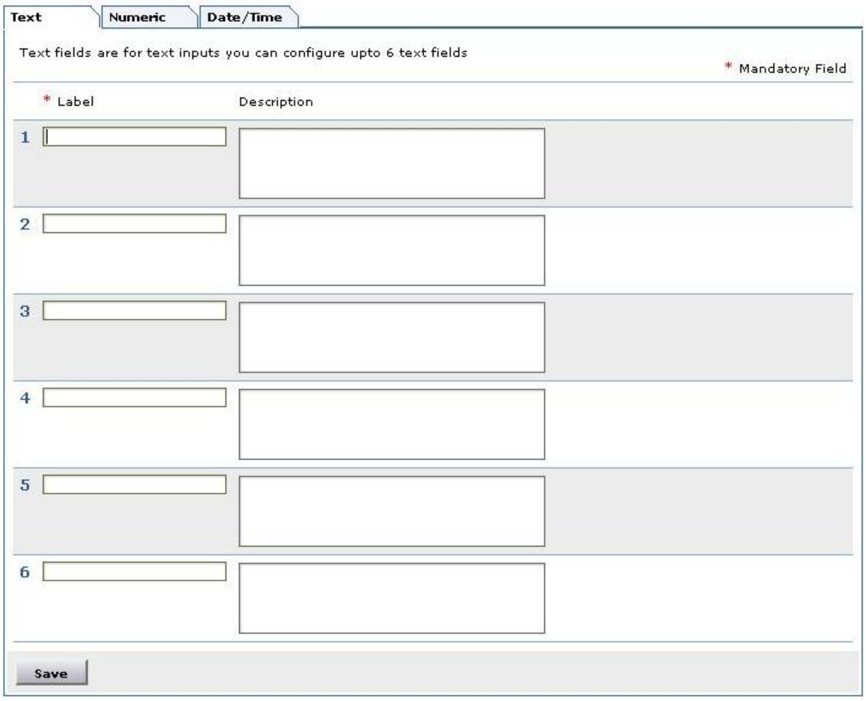
To delete a vendor, it is necessary that the product vendor association is first removed and then the vendor is deleted. Also ensure that the particular vendor is not used elsewhere. Follow the steps below to delete a vendor:

1. In the **Vendor List** page, click the edit icon beside **Vendor Name**.
2. Click the **Products** tab.
3. Click the delete icon beside the **Products**. A confirmation dialog is opened.
4. Click **OK** to proceed with the deletion. Delete all the products listed.
5. Click **view list** link on the top right corner of the center pane.
6. Now, click the delete icon beside the **Vendor Name** for which you removed the product list. A confirmation dialog is opened.
7. Click **OK** to proceed with the deletion. If you do not wish to delete the vendor, click **Cancel**.

Configuring Workstation - Additional Fields

By default, the New Workstation form has the required fields, where you can enter important details about an organization. Sometimes, you may need some additional fields in the New Workstation form. You can add your own fields using the **Workstation - Additional Fields** configuration. To add your own custom fields:

1. Log in to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Asset Management** block, click the **Workstation - Additional Fields** icon . The next page is a form that allows you to add the field label and description of the field. You can add three types of fields in the form, text, numeric, and date/time. These three are available in three tabs as shown below:



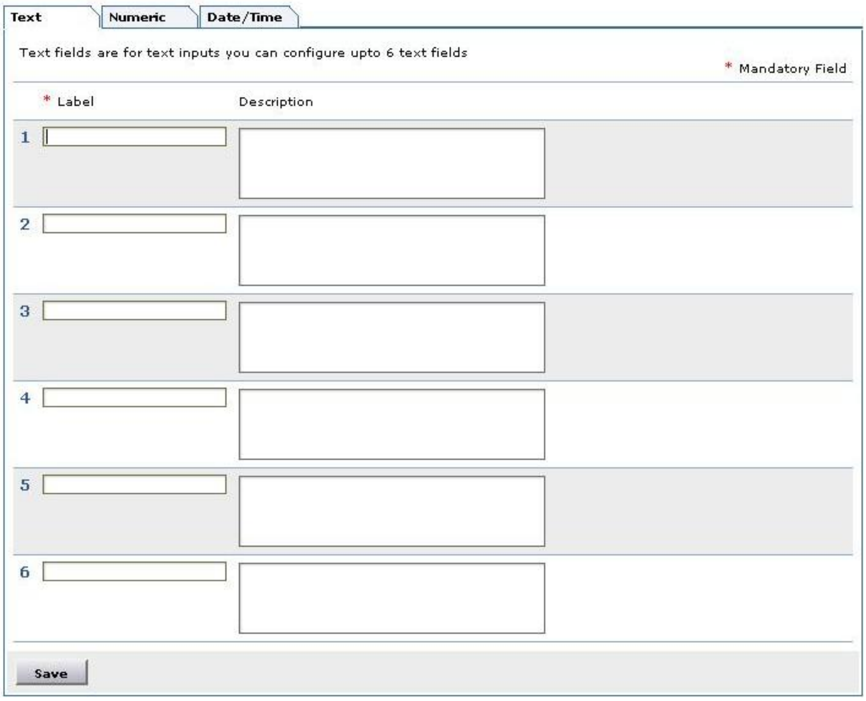
4. To add the text fields, enter the label name in the form fields below the Label heading. If required enter the description for the field.
5. To add numeric fields, click the **Numeric** tab and then enter the label name in the form fields provided for the same.
6. To add date/time fields, click the **Date/Time** tab and enter the required details.
7. Click **Save**. A message for successful creation of the fields is displayed.

These fields appear under the grouping **Additional Info** in the **New Workstation** form. To delete the user-defined fields, in step 4 through 7, instead of adding the label names, delete the label names that you wish to remove from the fields of the form and click **Save**. The fields that you deleted will be removed from the New Workstation form.

Configuring Asset - Additional Fields

Sometimes, you may want to capture some additional organization-specific asset details, for which, you need additional fields apart from the default fields in the **New Asset** form. You can add your own fields using the **Asset - Additional Fields** configuration. To add your own custom fields:

1. Log in to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Asset Management** block, click the **Asset - Additional Fields** icon . The next page is a form that allows you to add the field label and description of the field. You can add three types of fields in the form: text, numeric, and date/time. These three are available in three tabs as shown in the image.



4. To add the text fields, enter the label name in the form fields below the **Label** heading. If required enter a description for the field.
5. To add numeric fields, click the **Numeric** tab and then enter the required details.
6. To add date/time fields, click the **Date/Time** tab and enter the required details.
7. Click **Save**. A message is displayed saying that the additional field is successfully created.

These fields appear under the grouping **Additional Asset Details** in the **New Asset** form. To delete the user-defined fields, in steps 4 through 7, instead of adding the label names, delete the label names that you wish to remove from the fields of the form and click **Save**. The fields that you deleted will be removed from the new asset form.

Scanning Windows PCs

You can configure the Windows domains available in your network and scan the workstations associated with these domains. When you set up the ServiceDesk Plus application and start it for the first time, the application will scan your network and identify all the available Windows domain in your network.

To view the discovered domains:

1. Log in to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Asset Management** block, click the **Scan Windows PCs** icon. The resulting page displays the discovered list of Windows domains. You can add, edit, or delete domains.

If you find that there are some domains that are missing in the list, then you can add those domains manually also.

Add Domains

To add a new Windows domain:

1. Click the **Add New Domain** link available at the top right corner of the **Windows Domain List** page.
2. In the **Add Domain** form, enter the **Domain Name**. This field cannot be left empty and must have unique values.
3. Enter the Domain Controller name for the Active Directory Server from where the workstation list needs to be fetched.
4. Though the login name and password are not mandatory fields, they are required if you want to scan the domain and discover the associated assets and workstations. So enter the **Login Name** and **Password** for the domain.
5. If you wish to add any description for the domain, enter it in the **Description** text box.
6. Click **Save**.

If you want to add more than one domain, then instead of clicking Save, click the **Save and add new** button. This adds the new domain and reopens the add domain form after displaying a message that a new domain is added.

At any point, if you decide not to add the new domain, then click **Cancel** to get back to the Windows domain list. Clicking the **View List** link on the top right corner of the add domain form will also take you to the Windows domain list.

Edit Domains

When the application identifies the various domains in your network, it will list all those domains. But the login name and password for these domains need to be provided manually by editing the domain information before proceeding to scan a particular domain.

To edit the domain information:

1. In the **Windows Domain List** page, click the edit icon beside the **Domain Name** that you wish to edit.
2. In the **Edit Domain** form, you can modify the name of the domain, login name, password, and description of the domain.
3. Click **Save** to save the changes performed. At any point, if you wish to cancel the operation that you are performing, click **Cancel**.

Even while editing a domain, if you wish to add a new domain, then click the **Save and add new** button instead of clicking **Save** button after making the changes.

Delete Domains

To delete Windows domains:

1. In the **Windows Domain List** page, click the delete icon beside the **Domain Name** that you wish to delete. A confirmation dialog is opened.
2. Click **OK** to proceed with the deletion. If you do not wish to delete the domain, then click **Cancel**.

Scan Domains

You can scan the domains that are available in your network, if the domain details have the login name and password information. To start scanning a domain, click the scan domain icon available beside the **Domain Name** that is to be scanned. The page is refreshed, displaying the following message:

SUCCESS : Discovery started for the domain. Discovered workstations can be viewed from Inventory module.

This starts the scanning of workstations in the domain as a background process. You can view the scanned workstations in the **Inventory** module. The problems encountered during the scanning of workstations will be logged and can be viewed from the **Diagnostics** tab.

Note: For the Windows domain scan to be successful, ensure the following:

1. The ServiceDesk Plus Server needs to run on a Windows 2000 or XP machine.
2. WMI service needs to be enabled in both the server and the client.
3. Remote DCOM should be enabled in both the server and the client.

Network Scanning

ManageEngine ServiceDesk Plus can automatically scan for Windows domains and list them as soon as the application is installed and started for the first time. But it is not essential that all the workstations in your organizations are connected to a Windows domain. There can be non-Windows workstations and these workstations will not be a part of the Windows domain and hence may not be scanned. To avoid these kinds of omissions, ServiceDesk Plus supports IP-based network discovery, using which you can scan the workstations in other networks and the workstations that are not a part of the Windows domains.

To open the network scan configurations:

1. Log in to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Asset Management** block, click the **Network Scan** icon. You can add, edit, or delete networks.

Add New Network

To add a new network:

1. Click the **Add New Network** link available at the top right corner of the **Network List** page.
2. In the **Add Network** form, enter the **Network Address**. This field cannot be left empty and can take only unique values.
3. Though the login name and password are not mandatory fields, they are required if you want to scan the network and discover the associated assets and workstations. So enter the **Login Name** and **Password** for the network.
4. If you wish to add any description for the network, then you can enter the same in the **Description** text box.
5. Click **Save**.

If you want to add more than one network, then instead of clicking Save, click the **Save and add new** button. This adds the new network and reopens the add network form after displaying a message that the new network is added..

At any point, if you decide not to add the new network, then click **Cancel** to get back to the network list. Clicking the **View List** link on the top right corner of the add network form will also take you to the network list view.

Edit Network

If the login names and passwords of networks have changed, then you will need to modify the network details.

To edit the network information:

1. In the **Network List** page, click the edit icon beside the **Network Address** or the hyperlinked network address that you wish to edit.
2. In the **Edit Network** form, you can modify the network address, login name, password, and description of the network.
3. Click **Save** to save the changes. At any point, if you wish to cancel the operation that you are performing, click **Cancel**.

Even while editing a network, if you wish to add new network, then click **Save and add new** button instead of clicking **Save** button after making the changes.

Delete Network

To delete a network:

1. In the **Network List** page, click the delete icon beside the **Network Address** that you wish to delete. A confirmation dialog appears.
2. Click **OK** to proceed with the deletion. If you do not wish to delete the network, then click **Cancel**.

Scan Network

You can scan the network, if the network details have the login name and password information. To start scanning a network, click the scan network icon available beside the **Network Address** that is to be scanned. The page is refreshed, displaying the following message:

SUCCESS : Discovery started for the network. Discovered workstations can be viewed from Inventory module.

Note: To scan the Linux workstations, the telnet service needs to be enabled in both the server and the client workstations.

Configuring Audit Settings

You can schedule audits, clean up audits, and rediscover networks in the default configurations. To configure the default settings for Network Scan:

1. Log in to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Asset Management** block, click the **Audit Settings** icon.
4. To schedule regular audits, select the check box beside **Enable scheduled scan** under the **Scan Configuration** grouping, and provide the scan interval time in number of days.
5. For **scan history cleanup configuration**, select the check box beside **Enable scan cleanup** and enter the value for the **Delete scan history older than** field. This cleans up the audit information older than the number of days that you have specified.
6. To enable rediscovery of networks and domains, select the check box beside **Enable re-scan** under the **Re-scan for New Workstation** block. Also provide the re-scan time interval in terms of number of days.
7. Click **Save**. If you do not want to save the changes and retain the old settings, then click **Reset**.

Configuring Purchase Default Values

To configure the default purchase values:

1. Log in to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Asset Management** block, click the **Purchase - Default Values** icon below the **purchase** grouping. The next page displays the default configuration for the purchase.
4. Enter the **Default Tax Rate**. It can have decimal values.
5. If you want to tax the shipping cost also, then select the **Tax Shipping or not** check box.
6. Enter the **Shipping Address** in the text box provided for it.
7. Enter the **Billing Address** in the space provided for it.
8. Click **Save**. To revert to the old settings, click **Reset**.

User Management

For making the ServiceDesk Plus available and usable for all your customers, you need to add requesters and technicians, and define their roles. This enables the requesters to log in to the Self-Service Portal to check the status of the issues reported by them, submit requests, and search the knowledge base online. The added technicians can log in to the ServiceDesk Plus application and pick up requests, review and resolve requests assigned to them, add solution articles, and so on. The user management configurations allow you to add requesters, technicians, define roles, and login access permissions.

The various user management configurations that you can perform are

1. Defining Roles
2. Configuring user-defined fields for the new technician form
3. Configuring technicians and their roles
4. Configuring user-defined fields for the new requester form
5. Configuring requesters
6. Configuring Active Directory Authentication.

To access the user management related configurations:

1. Log in to the ServiceDesk Plus application using the **user name** and **password** of a ServiceDesk Plus administrator.
2. Click the **Admin** tab in the header pane. The **Users** block is below the Asset Management block.

Configuring Roles

ManageEngine ServiceDesk Plus can be accessed by different people of your organization. Those who access the application will have a defined role and hence have a defined set of tasks to execute. ServiceDesk Plus allows you to configure the roles and assign these roles to each and every user of the application.

To open the role configuration page:

1. Log in to the ServiceDesk Plus application using the **user name** and **password** of a ServiceDesk Plus administrator.
2. Click the **Admin** tab in the header pane.
3. In the **Users** block, click the **Role** icon. The next page displays the available list of roles. You can add, edit, or delete roles.

Add Role

To add a role:

1. Click the **Add New Role** link available at the top right corner of the **Role List** page.
2. In the **Add Role** form, enter the **Role Name**. This field cannot be empty and needs to be unique.
3. Set the **access permissions** for the role. To set the access permission, just select the check boxes beside the access levels defined for each of the modules of the application. For example, if you want to provide add permissions for the workstation and solution modules and only view permissions for the rest, select the check box below **Add** against the **Workstation** and **Solutions** modules. For the remaining modules, select the check box below **View**. Selecting the **Add** check box automatically enables view permissions also.
4. Enter the **description** for the role you are adding.
5. Click **Save**.

If you want to add more just one role, then instead of clicking Save, click **Save and add new** button. This adds the new role and reopens the add role form after displaying a message for the addition of the role.

At any point, if you decide not to add the new role, then click **Cancel** to get back to the role list. Clicking the **View List** link on the top right corner of the add role form will also take you to the role list view.

Edit Role

To edit an existing role:

1. In the **Role List** page, click the **edit** icon beside the role name that you wish to edit.
2. In the **Edit Role** form, you can modify the name of the role, description, and the permissions associated with the role.
3. Click **Save** to save the changes. At any point, if you wish to cancel the operation that you are performing, click **Cancel**.

Even while editing a role, if you wish to add a new role, click the **Save and add new** button instead of clicking Save button after making the changes. The Add Role form opens after displaying a message that the changes are saved.

Delete Role

1. In the **Role List** page, click the delete icon beside the role name that you wish to delete. A confirmation dialog is opened.
2. Click **OK** to proceed with the deletion. If you do not want to delete the role, then click **Cancel**.

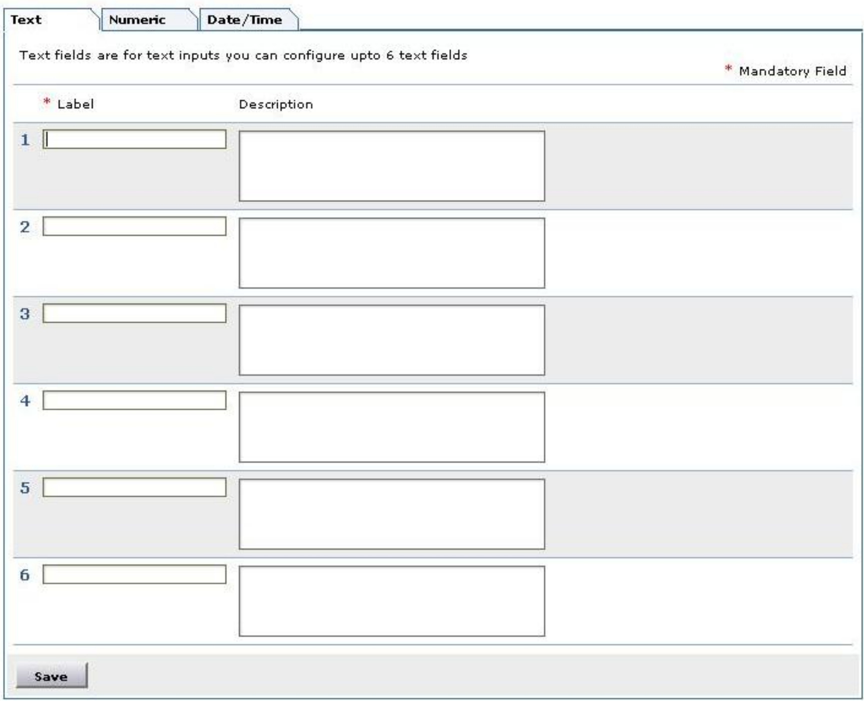
Note: You cannot edit or delete the SDAdmin and SDGuest roles that are already defined in the application. They are the default administrator and requester roles defined.

Configuring Requester - Additional Fields

By default, the New Requester form has the required fields, where you can enter important details about an organization. Sometimes, you may need some additional fields in the **New Requester** form. You can add your own fields using the **Requester User Defined Fields** configuration.

To add your own custom fields in the new requester form:

1. Login to the ServiceDesk Plus application using the **user name** and **password** of a ServiceDesk Plus administrator.
2. Click the **Admin** tab in the header pane.
3. In the **Users** block, click the **Requester - Additional Fields** icon . The next page is a form, where you can enter the field label and description of the field. You can add three types of fields in the form: text, numeric, and date/time. These three are available in three tabs as shown below:



4. To add the text fields, enter the label name in the form fields below the **Label** heading. If required, enter the **description** for the field.
5. To add numeric fields, click the **Numeric** tab and then enter the label name in the form fields provided for the same.
6. To add date/time fields, click the **Date/Time** tab and enter the required details.
7. Click **Save**. A message for successful creation of the fields is displayed.

These fields appear under the grouping **Additional Requester Details** in the **New Requester** form. To delete the user-defined fields, in step 4 through 7, instead of adding the label names, delete the label names that you wish to remove from the fields of the form and click **Save**. The respective fields that you deleted will be removed from the New Requester form.

Configuring Requesters

You can add, edit, or remove the requesters in the ServiceDesk Plus application and also provide them with login permissions to access the **self-service portal**.

To open the requester configuration page:

1. Log in to the ServiceDesk Plus application with the **user name** and **password** of a ServiceDesk Plus administrator.
2. Click the **Admin** tab in the header pane.
3. In the **Users** block, click the **Requesters** icon. The next page displays the available list of requesters. You can add, edit, or delete requesters.

Add Requester

To add a requester and provide login access to him/her:

1. Click **Add New Requester** link available at the top right corner of the **Requester List** page.
2. In the **Add Requester** form, enter the **Full Name** and **Employee ID** of the technician in the Personal Details block. The name is a mandatory field.
3. In the contact information block, enter a valid **e-mail ID**. If the requester has a **phone** and a **mobile** number, you can enter the same in the space provided for entering these values.
4. Select the **department** to which the technician belongs and enter his/her **job title**.
5. If you have added any organization-specific fields for the new requester form, those will be available under the **Additional Requester Details** block. Enter the relevant information.
6. In the **Self-Service Access Details** block, enter the **Login Name** and **Password**, if you wish to provide self-service access to the requester. Enter the password again in the **Re-type Password** field.
7. If you wish to mail the login information to the requester, then select the check box, **Mail self-service login details** available just below the **Re-type Password** field.
8. Click **Save**.

If you want to add more than one requester, then instead of clicking Save, click **Save and add new** button. This adds the new requester and reopens the add requester form after displaying a message for the addition of the requester.

At any point if, you decide not to add the new requester, then click **Cancel** to get back to the requester list. Clicking the **View List** link on the top right corner of the add requester form will also take you to the requester list view.

If a mail fetched by the ServiceDesk Plus application has a requester name and email ID that is not available in the requester or technician list already, then the name is automatically added in the requester list and the login name and password is created. The first part of the e-mail ID is set as the name and the entire e-mail ID is set as login name and password. The requester can log in to the self-service portal and change his/her password.

Import Requesters from Active Directory

You can also import requesters from an active directory. To import requesters from active directory

1. Click **Import from Active Directory** link in the **Requester List** page. The **Import From Active Directory** window pops up.
2. From the list of domains that are listed in the **Domain Name** combo box, select the domain name in which the active directory is installed.
3. Enter the name of the domain controller in the **Domain Controller Name** field.
4. Enter the login name for the Active Directory in the **Login name** field.
5. In the **Password** field enter the password of the Active Directory.
6. Click **Import Now!**. Once the import is complete, the data on how many records were added, how many overwritten, and how many failed to import will be displayed.

Import Requester from CSV (Comma Separated Value) Files

You can also add requesters by importing from CSV files. To import requesters from CSV file

Step 1: Locate the CSV file

1. Click **Import from CSV** link in the **Requester List** page. The **Import Wizard** opens in a pop-up window.
2. Click the **Browse** button in the wizard.
3. Select the CSV file in the file chooser window and click **Open**.
4. Click **Next**.

Step 2: Customize Mapping

1. The CSV column names are populated in the select boxes beside each label. Map the ServiceDesk Plus requester fields with the field names from the CSV file.
2. Click **Next**.

Step 3: Import

1. Click **Import Now** button. The values from the CSV file will be imported to the requester details. Once the import is complete, the data on how many records were added, how many overwritten, and how many failed to import.

If at any point you wish to stop importing from the CSV file, click the **Exit** button.

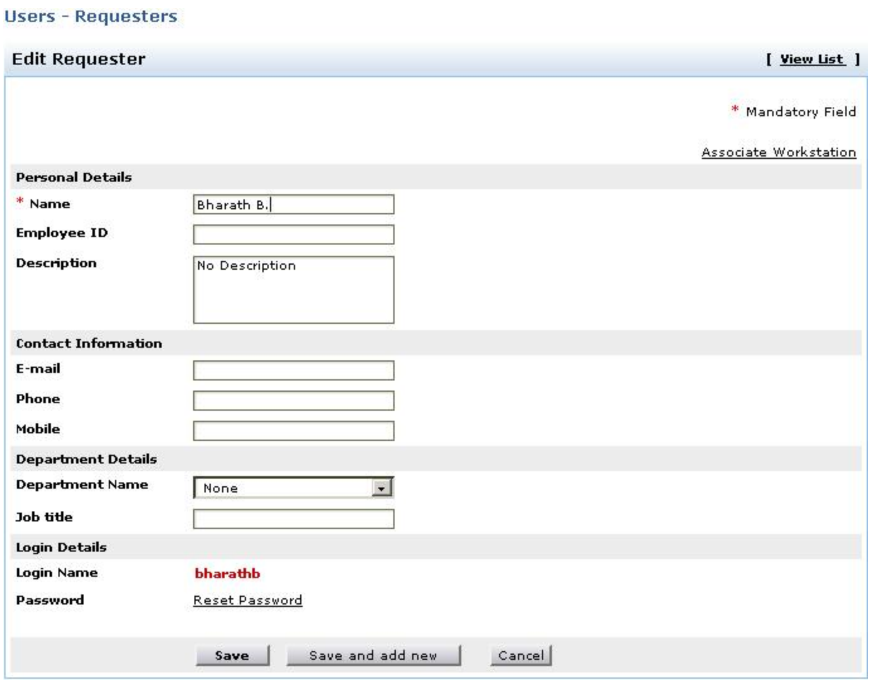
Note: Login name column will be the identifier for requesters. No two requesters can have the same login name. Hence the existence of a requester will be checked based on the login name value.

So if by mistake there was any mismatch of fields during mapping, and a new import of CSV is performed, the records will be updated based on the login name value. If there were any records that did not have any login name at all or there was mismatch in the login name itself, then duplicate entries will be created. In these cases, delete such entries from the requester list and import again or manually edit the information available.

Edit Requester

To edit the requester details:

1. In the **Requester List** page, click the **edit** icon beside the requester's full name that you wish to edit. The **Edit Requester** form is displayed with the existing details of the requester.



2. In the above form, you can modify all the fields displayed.
3. Click **Save**. If you do not wish to modify any of the details, click **Cancel**.

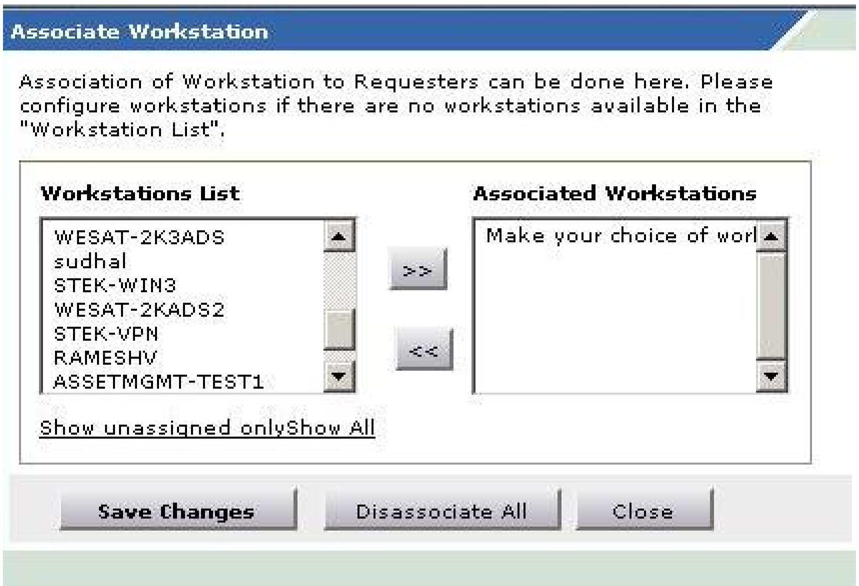
You can change the requester's password while editing the requester details.

1. To change the password of the requester, click the **Reset Password** link. The reset password window is opened.

2. Below the **Login Name** display, enter the **New Password** in the text field.
3. If you wish to mail the reset password information to the user, select the check box below the **New Password** field.
4. Click **Reset Password**. If you do not wish to change the password, click **Close** instead of **Reset Password**.

You can also associate a workstation with the requester. To associate a workstation with the requester:

1. Click the **Associate Workstation** link available at the top right corner of the form. The associate workstation window is opened.



2. In the **Associate Workstation** pop-up, select the workstations that you wish to associate with the requester from the **Workstation List** and move them to the **Associated Workstations** list by clicking the >> button. To dissociate workstations, select the respective workstations in the **Associated Workstations** list and click the << button. If you wish to dissociate all the workstations, then click **Dissociate All**.
3. After associating the required workstations, click **Save Changes**.
4. A message is displayed. Click the **Close** button.

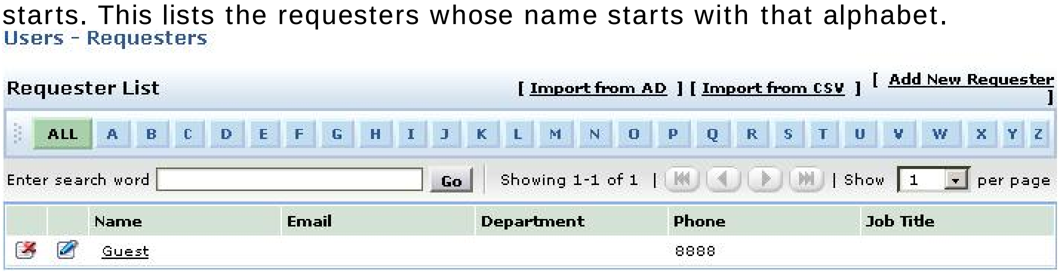
Delete Requesters

1. In the **Requester List** page, click the delete icon beside the requester's full name that you wish to delete. A confirmation dialog is opened.
2. Click **OK** to proceed with the deletion. If you do not want to delete the requester, then click **Cancel**.

Search Requesters

To search requesters

1. In **request list** view, click on the alphabet with which the name of the requester starts. This lists the requesters whose name starts with that alphabet.



2. If you are unsure of the starting letter, then you can type the name (first name or the last name, which ever you know) of the requester in the field beside the **Enter search work**. This lists the requesters whose name matches the search string that you entered.

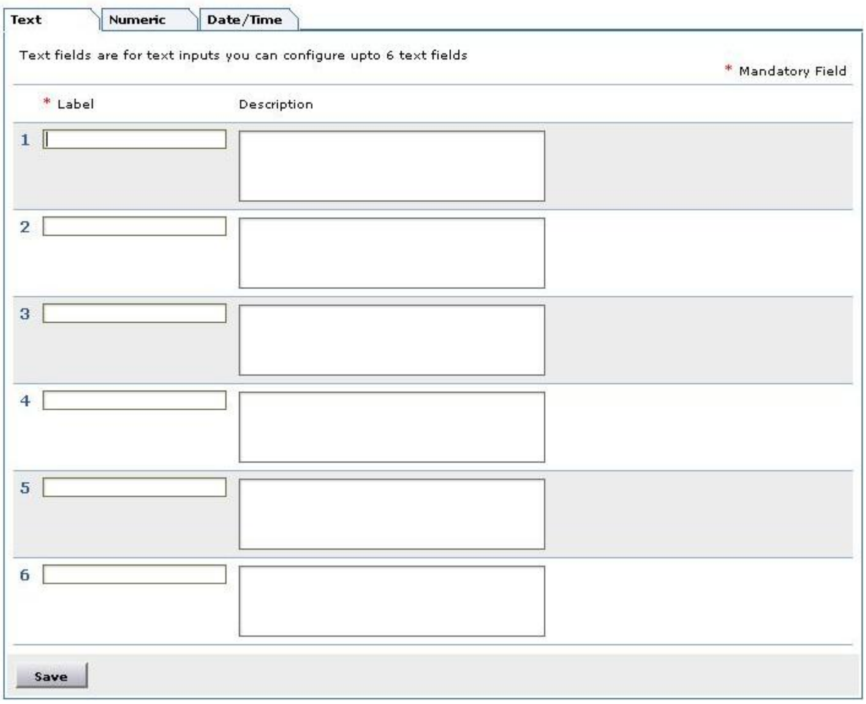
You can also search requesters from the **Search** available on the left menu in the other pages of the application. From the **Search in** combo box, select **Requesters** and type your search string in the **Enter Keyword** text field. Click Go or press Enter. The requester names that match the search string are listed in a separate pop-up window.

Configuring Technician - Additional Fields

By default, the New Technician form has the required fields, where you can enter important details about an organization. Sometimes, you may need some additional fields in the **New Technician** form. You can add your own fields using the **Technician User Defined Fields** configuration.

To add your own custom fields in the new technician form:

1. Log in to the ServiceDesk Plus application with the **user name** and **password** of a ServiceDesk Plus administrator.
2. Click the **Admin** tab in the header pane.
3. In the **Users** block, click the **Technician - Additional Fields** icon . The next page is a form, where you can enter the field label and description of the field. You can add three types of fields in the form: text, numeric, and date/time. These three are available in three tabs as shown below:



4. To add the text fields, enter the label name in the form fields below the **Label** heading. If required, enter the **description** for the field.
5. To add numeric fields, click the **Numeric** tab and then enter the label name in the form fields provided for the same.
6. To add date/time fields, click the **Date/Time** tab and enter the required details.
7. Click **Save**. A message for successful creation of the fields is displayed.

These fields appear under the grouping **Additional Technician Details** in the **New Technician** form. To delete the user-defined fields, in step 4 through 7, instead of adding the label names, delete the label names that you wish to remove from the fields of the form and click **Save**. The respective fields that you deleted will be removed from the New Technician form.

Configuring Technicians

The IT help desk team will have technicians who will be handling the requests posted/raised by various employees in the organization. You can add, edit, or remove the technicians in the ServiceDesk Plus application and also provide them with various access privileges that suit their role and need.

To open the technician configuration page

1. Log in to the ServiceDesk Plus application using the **user name** and **password** of a ServiceDesk Plus administrator.
2. Click the **Admin** tab in the header pane.
3. In the **Users** block, click the **Technicians** icon. Here you can add, edit, or delete technicians.

Add Technician

To add a technician and associate a role with him/her

1. Click the **Add New Technician** link available in the top right corner of the **Technician List** page.
2. In the **Add Technician** form, enter the **Full Name** and **Employee ID** of the technician in the Personal Details block. The name is a mandatory field.
3. In the contact information block, enter a valid **e-mail ID**. If the technician has a **phone** and a **mobile** number, you can enter the same in the space provided for entering these values.
4. Select the **department** to which the technician belongs and enter his/her **job title**.
5. If you have added any organization-specific fields for the new technician form, those will be available under the **Additional Technician Details** block. Enter the relevant information.
6. Now, in the **Login Details** block, you can provide login access to the technician with specific access privileges or enable administrative privileges for the technician. To enable login access to the technician with specific access privileges, select the check box beside the statement **Enable Login for this Technician**. This displays the **Assign Role** block just below the login and password fields.
7. Enter the **Login Name** and **Password**. Enter the password again in the **Re-type Password** field. All these fields are mandatory if login is enabled. Also note that the login name needs to be unique.
8. In the **Assign Role** block, select the roles from the **Available Roles** list and click the >> button to assign those roles to the technician. If you want to remove any of the roles assigned, then select the role from the **Assigned Role** list and click << button. The selected roles will be removed.
9. Click **Save**.

If you want to add more than one technician, then instead of clicking Save, click **Save and add new** button. This adds the new technician and reopens the add technician form after displaying a message that the new technician is added successfully.

If you decide to give the login access for the technician at a later time, you can save the technician details without the login details. For this, you need to stop with the step 5 and click **Save**. Later you can add the login details by editing the technician details.

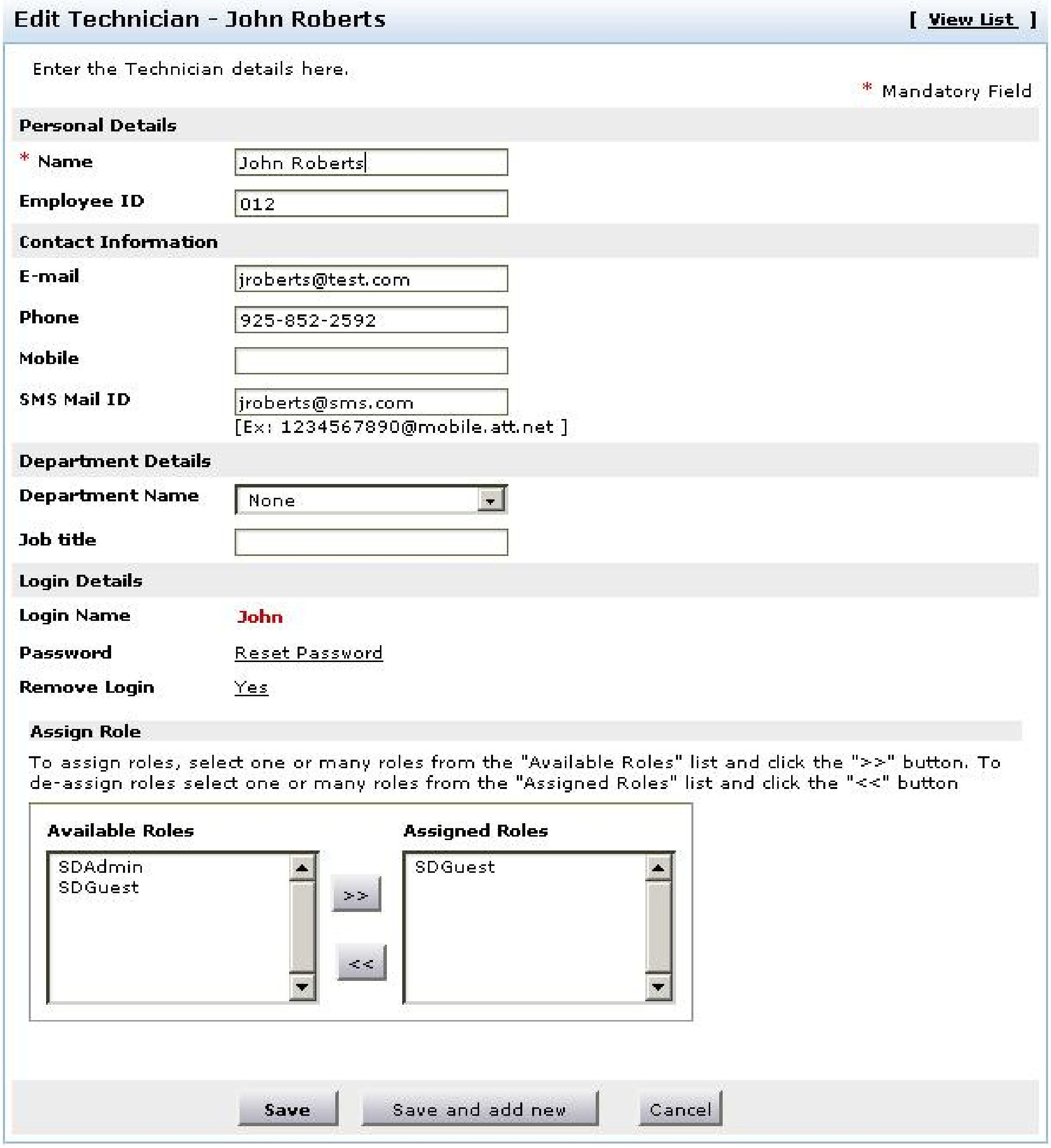
At any point, if you decide not to add the new technician, then click **Cancel** to get back to the technician list. Clicking the **View List** link on the top right corner of the add technician form will also take you to the technician list view.

Edit Technician

If you have added a technician without giving the login details, then you can enable the same by editing the technician's details.

To edit a technician information

1. In the **Technician List** page, click the **edit** icon beside the technician's full name that you wish to edit. If you have not enabled the login permissions, the edit technician form opens with a view similar to the add technician form. Enable the login permissions as mentioned in the add technician form (starting from step 6 onwards).
2. If the login permissions have been added while adding the technician itself, then the edit technician form will look as below:



3. In the above form, you can modify all the fields displayed and also change the roles assigned, by adding or removing roles. (To add new roles, refer to the Configuring Roles section.)

4. Click **Save** to save the changes performed. At any point, if you wish to cancel the operation that you are performing, click **Cancel**.

Even while editing a technician, if you wish to add a new technician, then click **Save and add new** button instead of clicking Save button after making the changes. The **Add Technician** form opens after displaying a message that the changes have been updated successfully.

You can also **change the password** of the technician from the Edit Technician form.

1. Click the **Reset Password** link available beside the **Password** field in the Edit Technician form.
2. In the **Reset Password** pop-up, enter the **New Password** in the field provided below the login name.

3. To send the reset password information to the user, select the check box below the New Password field.
4. Click **Reset Password**. If you do not wish to change the password, click **Close** instead of **Reset Password**.
5. In the **Edit Technician** form, click **Save**.

While editing the technician details, you can also choose to remove his/her login permissions.

1. In the Edit Technician form, below the password field, click the **Yes** link beside the **Remove Login** field. A confirmation window appears.
2. To continue removing the login permissions, click **OK**. A message is displayed informing the removal of the login permissions and the technician edit form is displayed without the login details. If you do not wish to remove the login permission, click **Cancel**.
3. Click **Save**.

Delete Technicians

1. In the **Technician List** page, click the delete icon  beside the technician's full name that you wish to delete. A confirmation dialog is opened.
2. Click **OK** to proceed with the deletion. If you do not want to delete the technician, then click **Cancel**.

Configuring Active Directory Authentication

You can configure to authenticate the requester login with the active directory (AD). This provides you an advantage of not having to remember too many passwords. In you have configured AD authentication, then any password change that is made in the AD will also reflect in ServiceDesk Plus. So the requesters can login using the login name and password of the system.

	Note: Please ensure that before you start configuring the AD Authentication, you have already imported the requesters. Only if a user account is available in ServiceDesk Plus application, it will authenticate the password for that user account from the active directory. Hence, when none of the users have been imported from the active directory, the authentication cannot be done for the user account.

To configure the Active Directory Authentication

1. Log in to the ServiceDesk Plus application using the **user name** and **password** of a ServiceDesk Plus administrator.
2. Click the **Admin** tab in the header pane.
3. In the **Users** block, click the **Active Directory Authentication** icon. Here you can configure your active directory that will help in authenticating the user name and password from the AD directly.
4. From the list of domains that are listed in the **Domain Name** combo box, select the domain that has the Active Directory. The values populated here are fetched from the domains that have been discovered in the network while setting up ServiceDesk Plus.
5. Enter the server name of the AD in the **Active Directory Server** text field.
6. Select the radio button **Active Directory Authentication**, to enable the requester authentication from the active directory instead of ServiceDesk Plus requester details. Else you can choose **ServiceDesk Plus Authentication**.
7. Click **Save**. At any point if you wish to cancel the process, click **Cancel**. If you want to get back to the original settings, then instead of clicking save, click **Reset**.

	Note: If you have already imported users from Active Directory, then the details for step 3 and 4 will be fetched from the details entered while importing, and this information will be stored under the domain scan also.

User Survey

You can easily configure the customer satisfaction survey to collect information on various key parameters that you would like to measure about the support team and the response quality. You can define your own survey and the reports will be generated based on the survey that you have defined. You can also set the frequency of conducting the survey.

The various survey related configurations that you can perform are

1. Configuring Survey Settings
2. Defining a Survey

Apart from the above the you can also do the following survey related actions:

1. Sending Survey for a Request
2. Viewing the Survey Results

Once you have completed configuring and defining the survey, you can have a look at the preview of the survey by clicking the Survey Preview link on the left menu or the Survey Preview icon in the Admin tab.

To access the user survey related configurations

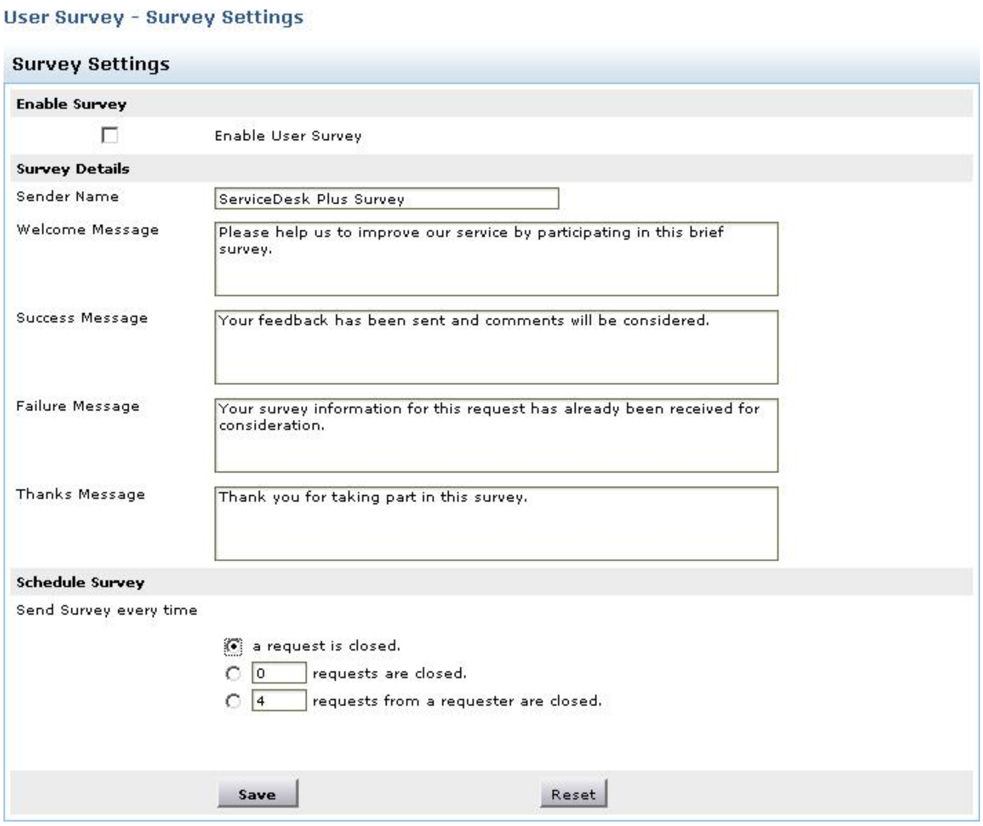
1. Log in to the ServiceDesk Plus application using the **user name** and **password** of a ServiceDesk Plus administrator.
2. Click the **Admin** tab in the header pane. The **User Survey** block is below the Users block.

Configuring Survey Settings

Survey settings enables you to configure the default values for welcome message, survey success or failure message, and thank you message. You can also choose to enable or disable a survey. If you enable a survey you can also schedule the periodicity of conducting the survey.

To configure the survey settings

1. Log in to the ServiceDesk Plus application with the **user name** and **password** of a ServiceDesk Plus administrator.
2. Click the **Admin** tab in the header pane.
3. In the **User Survey** block, click the **Survey Settings** icon . The **Survey Settings** page is displayed.
4. To enable the survey, select the check box **Enable User Survey**.
5. Under the **Survey Details** block, enter the **Sender Name**.
6. In the **Welcome Message** text area, enter the message that you wish to display as the welcome message to the user taking the survey.
7. In the **Success Message** text area, enter the message that you would display on successful submission of the survey by the user.
8. When the survey is taken by a person who has already submitted the answers for the survey, then you will have to display a failure message. You can enter the same in the **Failure Message** text area.
9. You can also enter the thank you message that will be displayed just before the Submit button in a survey, in the **Thanks Message** text area.
10. To schedule the survey, in the **Schedule Survey** block, choose the radio button that you wish to set as a criteria for sending the survey.



11. Click **Save**. The survey settings are saved.

Defining a Survey

You can define your own survey by adding your own questions and satisfaction levels that will suit the needs of your organization and users.

To define your survey

1. Log in to the ServiceDesk Plus application using the **user name** and **password** of a ServiceDesk Plus administrator.
2. Click the **Admin** tab in the header pane.
3. In the **User Survey** block, click the **Define a Survey** icon . Here you can add, edit, or delete your survey questions and satisfaction levels.

Add Survey Questions

To add a survey questions

1. Click the **+ Add Question** button available in the **Questions** tab in the **Define Survey** page.
2. In the Question pop-up window, type your question in the text area provided.
3. Click **Save**. The question will get added in the Define Survey Questions tab.

You can add any number of questions to the survey by following the above steps. As you keep adding questions it will get appended at the end of the list of questions. You can change the order of the questions by clicking the **Move Up** and **Move Down** link that is available beside each question.

Edit a Survey Question

To edit the survey question

1. In the **Questions** tab, click the **Edit** link beside the question that you wish to edit.
2. In the Question pop-up window, edit the question displayed in the text area.
3. Click **Save**. The **Define Survey** page is refreshed to display the modifications made.

Delete a Survey Question

1. In the **Questions** tab, click **Delete** link beside the question that you wish to delete. A confirmation dialog pops up.
2. Click **OK** to delete the question.

Note: If you delete a question from a survey, then it will have an impact on the survey results that have been collected previously.

Add Satisfaction Levels

To add satisfaction levels that will be displayed as choices for each of the survey questions

1. Click the **Satisfaction Levels** tab in the **Define Survey** page.
2. Click **+ Add Level** button.

3. In the satisfaction level pop-up window, enter the satisfaction level in the text area provided.
4. Click **Save**. The satisfaction level is added and the **Define Survey** page is refreshed to display the added satisfaction level.

You can add any number of satisfaction level to the survey by following the above steps. As you keep adding the levels it will get appended at the end of the list of already added levels. You can change the order of the same by clicking the **Move Up** and **Move Down** link that is available beside each question. Satisfaction levels scales from good to bad, good at the top bad at the bottom. Moving up or down changes the satisfaction levels.

Edit a Satisfaction Level

To edit a Satisfaction level

1. In the **Satisfaction Levels** tab, click the **Edit** link beside the satisfaction level that you wish to edit.
2. In the satisfaction level pop-up window, edit the satisfaction level displayed in the text area.
3. Click **Save**. The **Define Survey** page is refreshed to display the modifications made.

Delete a Satisfaction Level

1. In the **Satisfaction Levels** tab, click the **Delete** link beside the satisfaction level that you wish to delete. A confirmation dialog pops up.
2. Click **OK** to delete the satisfaction level.

Note: If you delete a satisfaction level from a survey or change its order, then it will have an impact on the survey results that have been collected previously.

Sending Survey

If the survey is enabled in the survey settings, then a technician or the ServiceDesk Plus administrator can manually send a survey to the requesters once the survey is closed.

To send the survey

1. Log in to ServiceDesk Plus application using your **user name** and **password** or that of the ServiceDesk Plus administrator.
2. Click the **Requests** tab.
3. In the Request list view, select the filter **Closed Requests** or **My Closed Requests**.
4. Click the request **Title** for which you wish to send the survey.
5. Click **Send Survey for this Request** link available under the **Tasks** block. A success message that the survey has been sent for the request is displayed and the survey will be sent to the requester who created the request as a mail with a URL which opens the survey.

> **Note:** The following conditions need to be true for the Send Survey for this Request link to be visible:
>
> 1. Either a technician or administrator should have logged in.
> 2. The request must be closed.
> 3. The **User Survey** must be enable in the **Survey Settings**.

Viewing Survey Results

Once the requester completes the survey, the administrator and the requester who took the survey can view the survey results.

To view the survey results

1. Log in to the ServiceDesk Plus application using the **user name** and **password** of a ServiceDesk Plus administrator.
2. Click the **Requests** tab.
3. In the Requests list view select the **Closed Requests** or **My Closed Requests** filter.
4. Click the request **Title** for which you wish to see the survey results.
5. Click **View Survey Results** link available under the **Tasks** block. The survey results opens in a pop-up window.
6. Once you have viewed the results, click the **Close** button.

Note:

1. The View Survey Results link appears only if the requester has completed taking the survey. Else this link will not be present.
2. Once the survey is submitted, the responses cannot be changed.

Configuring General Settings

This portion of the Admin tasks has a few settings common to all the groups, such as configuring the search in FreeAnswers.net and settings the alias URL.

To open the General settings page

1. Login to ServiceDesk Plus using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. Click **Settings** under the **General** block.

To show or remove the FreeAnswers.net link on the Solutions page, you need to select **Yes** or **No** radio button based on your need.

You can specify your own url, which will be exposed to the external world as the ServiceDesk Plus server. This Alias URL will point to the location where the ServiceDesk Plus server is running and will be used by the application while mailing self-service login details and customer satisfaction surveys to requesters.

To provide an alternate URL

1. In the text field provided beside the **http://** text, enter the URL (along with the port number if needed).
2. Click the **Open alias URL in a new window** link just below the text field, to test if the alias URL works.
3. Click **Save**, to save the changes made in the settings.

Configuring Header Tabs

ManageEngine ServiceDesk Plus enables you to provide restricted access to the users of the application. You can configure different permissions for each user and thus totally deactivate a header tab from their view. You can do this by creating and assigning specific roles to the users. To know more about creating and associating roles to users of the application, refer to the section Configuring Roles and Configuring Technicians.

Reports

ManageEngine ServiceDesk Plus gives you a set of preset help desk and asset reports generated from the data available in the application.

To view the various reports available in application

1. Log in to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Reports** tab in the header pane. The next page lists the various reports grouped under different heads.

The following sections explain the various reports and the kind of data that each of these reports represents. The reports are grouped under the following categories:

1. Helpdesk Reports
2. Asset Reports
3. Survey Reports
4. Purchase Reports

About ServiceDesk Plus Reports

The ServiceDesk Plus reports are classified under the following heads:

- Helpdesk Reports
- Asset Reports
- Survey Reports
- Purchase Reports

Helpdesk Reports

Under Helpdesk reports, the reports are grouped as:

Summary Reports: These reports provide you with a high level view of the requests received and closed during a particular period, date-wise. The summary reports available are the received request summary reports by date and closed request summary reports by date. These reports are generated on the parameters of request received or closed by technicians, request received or closed in a specific category, priority, and mode.

Open Requests Report: This shows the distribution of open requests for a specific period of time, based on parameters, such as priority, department, technician, category, due date, created date. The reports available here are Open requests by category, open requests by priority, open requests by technician, open requests by department, open requests by due date, and open requests by created date.

Closed Requests Reports: These reports show the distribution of completed and closed requests. Similar to the Open Request Reports, these reports are also generated based on various parameters such as priority, department, created date, due date, technician, and category.

Overdue Requests Reports: These reports display the distribution of the requests that have been overdue. By overdue, we mean that the requests have been in the open state beyond their due dates. The parameters to generate the reports are same as the previous reports.

All Requests Reports: These reports display all the distribution of all the requests received by ServiceDesk Plus irrespective of their state. The parameters to generate the reports are same as the previous reports.

SLA Violation Reports - Closed Requests: These reports display the distribution of the requests that have violated the SLA that was applicable on them. You can view these violations based on the request category, the department from which the request was generated, and the technician who handled the request.

By default, the helpdesk reports will be created for the current week. You can choose any custom period of your choice or choose to create reports for last week, or this month, or for just this day. All these reports can be used for analysis purposes. For example, the reports mapped against the parameter technician can be used to measure the technician responsiveness and load handling capability.

In all the above report types, except the summary reports, the x-axis denotes the parameter used to generate the report while the y-axis denotes the number of the requests.

The summary reports are tabular reports with the columns denoting the days and the rows having the values of the parameter taken for generating the report. For example, if the parameter used is technician, then the rows will have the technician names, while the columns have the days of the week or month depending on the time period chosen.

Asset Reports

The major categories under which the asset reports are grouped are general reports and workstation reports. General reports have a list of reports that give details about all assets owned by your organization mapped against various parameters.

Assets by Product Types report provides the information on the number of assets available in each of the product type, where product type usually is represented with categories, such as Software, Hardware, and so on.

Assets by Product report provides information on the number of assets that are available in each product purchased. Products represent the specific products like Dell PCs or Adobe Photoshop.

Assets by Acquisition Date provides information on the distribution of assets purchased on various occasions. You can choose the time period for which the report needs to be generated. By default, the report will be generated and displayed for the current week.

Assets by Expiry Date provides information on the asset expiry date so that you can be well informed about its expiry and plan for its renewal or replacement well in advance.

Assets by Requesters gives information on the number of assets owned by an individual requester for the current week. You can choose to view for a different time period also.

Unassigned assets by Product type report gives information on the assets that are available for assigning to requesters on demand in each of the product type. Similarly, the **unassigned asset by product** report gives information on the assets available for association on demand in each product.

Assets not in Contract report gives information about the assets that have not appeared in the contracts. This is also of two types categorized based on product type and product.

Assets from Vendor report provides information about the asset and vendor association. This can be of two types based on product type and product.

The workstation reports give you information about the various workstation-related metrics.

Workstations by OS report gives you an overview on the percentage of workstations belonging to each type of operating system. Thus you will also know the different types of Operating Systems in use in your organization.

Workstations by Manufacturer report gives you a high-level distribution view of the workstations used from different manufacturers.

Workstations by Domain report tells you the workstation grouping based on domains. Thus you get to know the number of workstations in each of the domains in your organization network.

Workstations by Network gives you the grouping of workstations depending on the network to which they belong, thus enabling you to estimate the load on each network and allot new workstations judiciously.

Unassigned workstations by Domain gives you the number of workstations that are connected to the domains but are not assigned to any user or department or workstation. The list of workstations is also displayed in the tabular form just below the graph.

Unassigned workstations by Network gives you the list of workstations that are connected to your networks but are not assigned yet to any user or department. The list of workstations is also displayed in the tabular form just below the graph.

OS count by domain report tells you the number of OSs in a particular domain and also gives you the number of workstations that have the OS installed in them. This report is in a tabular format and gives you only the numbers.

OS count by network report tells you the number of OSs in a particular network and also gives you the number of workstations that have the listed OS installed in them. This report is in a tabular format and gives you only the numbers.

Model count by domain report gives the workstation model count in a particular domain. It lists the various workstation models available in the organization as columns and the domains as rows. The count of each of the workstation models in a particular domain is provided in the table cell corresponding to it.

Model count by network gives the workstation model count in a particular network. It lists the various workstation models available in the organization as columns and the network IPs as rows. The count of each of the workstation models in a particular network IP is provided in the table cell corresponding to it.

Manufacturer count by domain report again is a tabular report that has the list of manufacturers from whom your organization has acquired workstations as the columns and the domain names as rows. The cells contain the count that denotes the number of workstations of a specific model available in that particular domain.

Manufacturer count by network report is also a tabular report that has the list of manufacturers from whom your organization has acquired workstations as the columns and the network IPs as rows. The cells contain the count that denotes the number of workstations of a specific model available in that particular network address.

Survey Reports

The survey reports can be found just below the Asset Reports grouping. To view the reports, you just need to click on the corresponding report link. They are all summary type reports and will display the information in the form of table data. They provide you with the summary details on the survey results based on various parameters. All these reports help in measuring the efficiency and effectiveness of the support team and the kind of corrective actions that might be needed to delight the requesters.

Survey Overview Report gives the overall ratings of each of the questions in the survey based on the feedback of the users who took the survey. The ratings give you an idea about the value that is associated with the corresponding question. This report provides both tabular and a graphic representation of the results.

Survey Results by Category report has the survey information grouped based on the category. Against each category, the points gained by each of the survey questions will be tabulated. Depending on the kind of survey questions, this report will provide valuable information based on individual request categories.

Survey Results by Technicians has the survey information grouped based on individual technicians. Each of the survey questions will carry some value and based on this value, the average value for the questions will be marked against the technicians. These points will enable you to objectively measure the technicians efficiency and effectiveness from the users perspective and take any corrective measures, if required.

Survey Results by Requester has the survey information grouped based on individual requester. This helps you in finding out which requester has sent the maximum number of requests and any other information based on your survey questions. This will give you an idea of the users perspective and help you in deciding about the corrective actions that need to be taken to make the support team more efficient and effective.

Survey Results by Priority has the survey information grouped based on the priority of the requests. The points for each question of the survey is mapped against the priority of the request for which the survey was sent.

Survey Results by Level has the survey information grouped based on the level of the requests. The points for each question of the survey is mapped against the level of the request for which the survey was sent.

Survey Results by Mode has the survey information grouped based on the mode of the requests. The points for each question of the survey is mapped against the mode of the request for which the survey was sent. This also gives you an idea on the mode of request that is most frequently used to create a new request.

Survey Results by Department has the survey information grouped based on the department from which the requests originated. The points for each question of the survey is mapped against the department name from where the request originated.

Purchase Reports

The purchase reports are listed just below the Survey Reports. To view the report, just click the corresponding report link.

Order Placed Report gives you the overall purchase orders that have been placed by your firm and the total cost of the PO items. The report is available in both tabular as well as graphical format. The tabular format gives you information on the requester who the placed the order, when it was ordered, if the items have been received the date when they were received will be displayed, the vendor name, and the price of the item. At the bottom of the table the total purchase cost will be displayed. This total includes the cost of the items that are yet to be received also.

Items Received Report gives information on the items of the purchase order that have been received. The tabular report gives the total cost of the items that have been received till date. This helps in calculating the total expenditure of the organization for a time period.

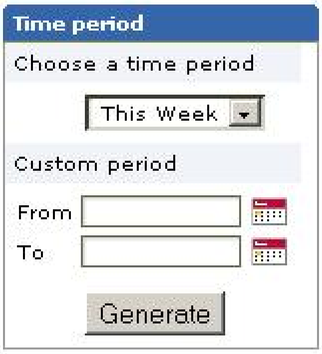
Viewing Helpdesk Reports

To view helpdesk reports

1. Log in to ServiceDesk Plus using the user name and password of an admin user.
2. Click the **Reports** tab in the header pane. First, the help desk reports are listed, followed by the assets reports.
3. Click any of the helpdesk reports.

For all the helpdesk reports, you can choose the time period for which the report can be generated. To choose the time period, follow the steps given below:

1. Click the report name to view the default report generated for the current week.
2. Once you enter into the individual helpdesk report view, on the right side you will see a **Time Period** block. By default, **This Week** is selected in the **Choose a time period** combo box.



3. From the **Choose a time period** combo box, select your time period. The various options available are **Today**, **This Week**, **Last Week**, **This Month**, and **Ever Opened**.

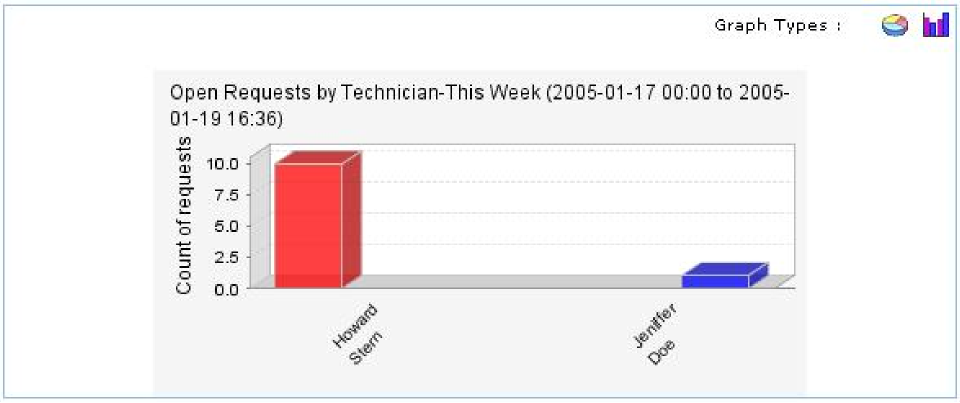
	Note: For the summary reports, you will not find the Ever Opened option in the time period combo box.

If you do not want the predefined periods, then you can choose your own custom period.

1. In the **Time Period** block, click the calender icon beside the **From** field under **Custom Period**.
2. Choose a start date from which the report needs to be generated.
3. Similarly, choose an end date for the report in the **To** field.
4. Click **Generate**.

The report is generated for the custom period that you have chosen.

You can view the report either as a bar graph or as a pie chart. By default, the report is displayed as a bar graph as shown below:



To view the report as a pie chart, click the icon. To view it as a bar chart, click the icon.

Viewing Asset Reports

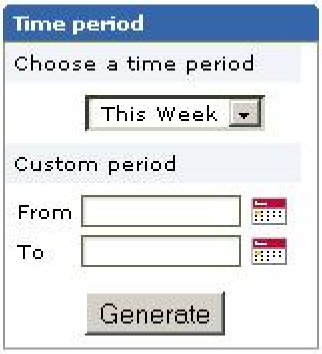
To view asset reports

1. Log in to ServiceDesk Plus using the user name and password of an admin user.
2. Click the **Reports** tab in the header pane. The asset reports are listed below the helpdesk reports.
3. Click any of the asset reports.

You can generate **Assets by Acquisition Date** and **Assets by Expiry Date** reports for the time duration you want.

To choose the time period

1. Click the report name to view the default report generated for the current month.
2. Once you enter into the individual report view, on the right side you will see a **Time Period** block. By default, **This Month** is selected in the **Choose a time period** combo box.



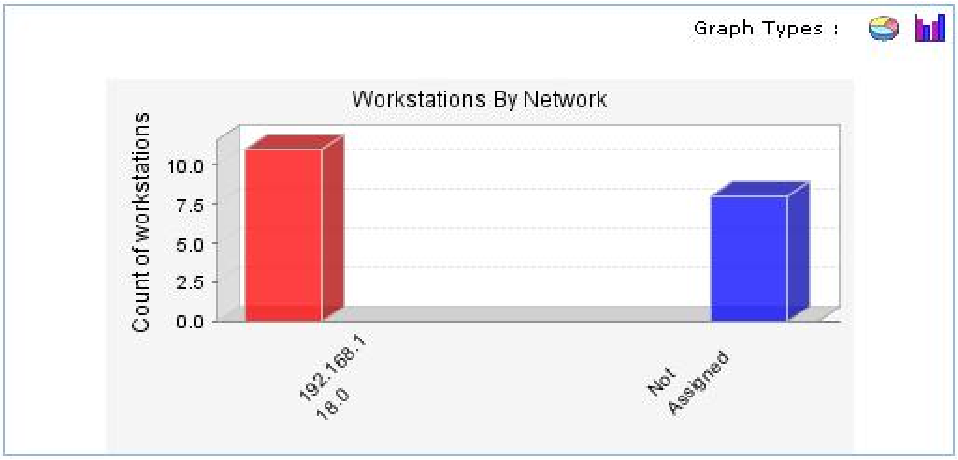
3. From the **Choose a time period** combo box, select your time period. The various options available are **This Week**, **Last Week**, **This Month**, **This Quarter**, **Last Quarter**, and **Ever Opened**.

If you do not want the predefined periods, then you can choose your own custom period.

1. In the **Time Period** block, click the calender icon beside the **From** field under **Custom Period**.
2. Choose a start date from which the report needs to be generated.
3. Similarly, choose an end date for the report in the **To** field.
4. Click **Generate**.

The report is generated for the custom period that you have chosen.

You can view the report either as a bar graph or as a pie chart. By default, the report is displayed as a bar graph as shown below:



To view the report as a pie chart, click the icon. To view it as a bar chart, click the icon.

Viewing Purchase Reports

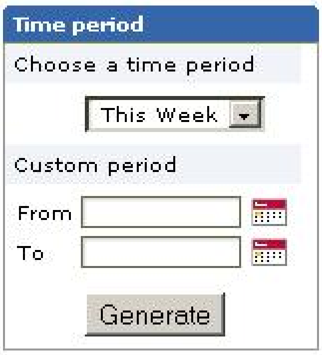
To view purchase reports

1. Log in to ServiceDesk Plus using the user name and password of an admin user.
2. Click the **Reports** tab in the header pane. The purchase reports are listed below the survey reports.
3. Click any of the purchase reports.

You can generate the purchase reports for the time duration you want.

To choose the time period

1. Click the report name to view the default report generated for the current month.
2. Once you enter into the individual report view, on the right side you will see a **Time Period** block. By default, **This Month** is selected in the **Choose a time period** combo box.



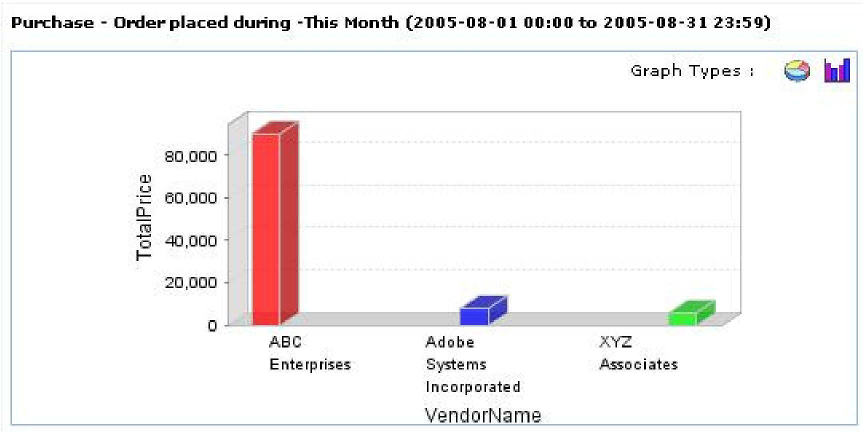
3. From the **Choose a time period** combo box, select your time period. The various options available are **This Week**, **Last Week**, **This Month**, **This Quarter**, **Last Quarter**, and **Ever Opened**.

If you do not want the predefined periods, then you can choose your own custom period.

1. In the **Time Period** block, click the calender iconbeside the **From** field under **Custom Period**.
2. Choose a start date from which the report needs to be generated.
3. Similarly, choose an end date for the report in the **To** field.
4. Click **Generate**.

The report is generated for the custom period that you have chosen.

You can view the report either as a bar graph or as a pie chart. By default, the report is displayed as a bar graph as shown below:



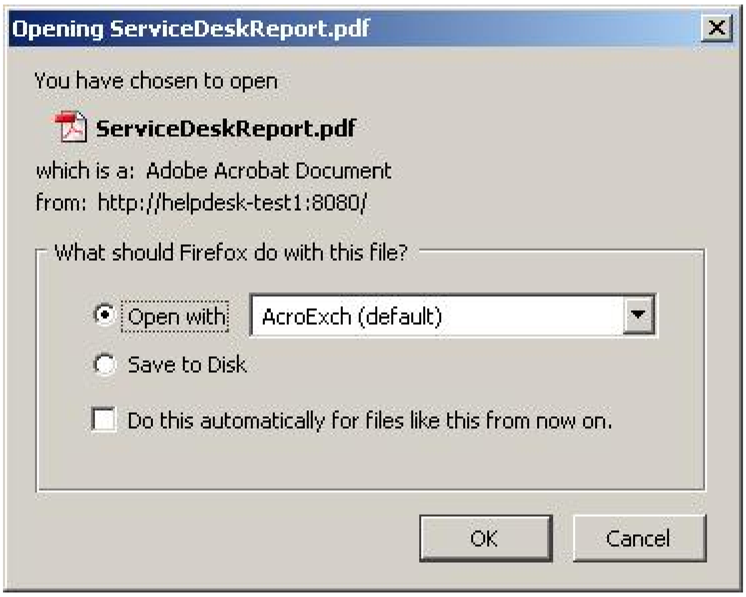
To view the report as a pie chart, click the  icon. To view it as a bar chart, click the  icon.

Exporting Report as PDF

You can export the report as PDF and save the PDF version of the report for future reference.

To export a report as PDF

1. Generate the report that you want. To know how to generate a report, refer to the Viewing Helpdesk Reports and the Veiwing Asset Reports topics.
2. In the report view, click the **Export as PDF** link available at the top right corner of the report block.
3. If you have a PDF reader (Acrobat Reader), you will be asked if you want to open the document in your default PDF reader. Or else, you can choose to save the PDF document to your disk by selecting the **Save to Disk** radio button. If you want to open the PDF in a PDF reader, then leave the default selected option as is.



4. Click **OK**. The PDF document is opened in your default PDF reader.
5. Save the PDF document for future reference.

General Features

This topic explains the various features that are not grouped under any of the modules but can be used from the application.

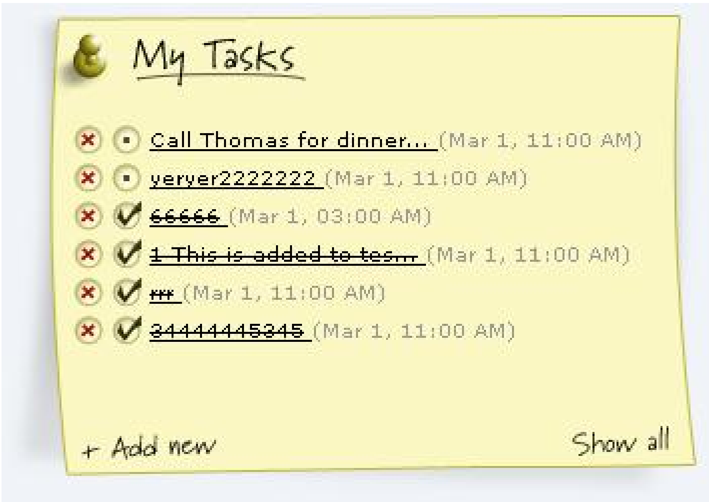
- Tracking your daily tasks
- Viewing the error logs from Support
- Changing the password
- List of the last ten Recent Items viewed in the application
- Data back up and restore options
- Changing Web Server Port

Tracking My Tasks

ManageEngine ServiceDesk Plus provides you with the option of tracking your tasks for everyday. The tasks that you add to the **My Tasks** list act as substitute for your sticky notes or post-it notes which you would use to remember your tasks for the day.

To add new tasks to your task list

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click **Add New** at the left bottom of the **My Tasks** note or **New Task** link just below the header tabs. A new task form is opened. In the add new task form, the date field is set to the today's date and the time is set by default as 00:00 AM. Change the date and time settings.



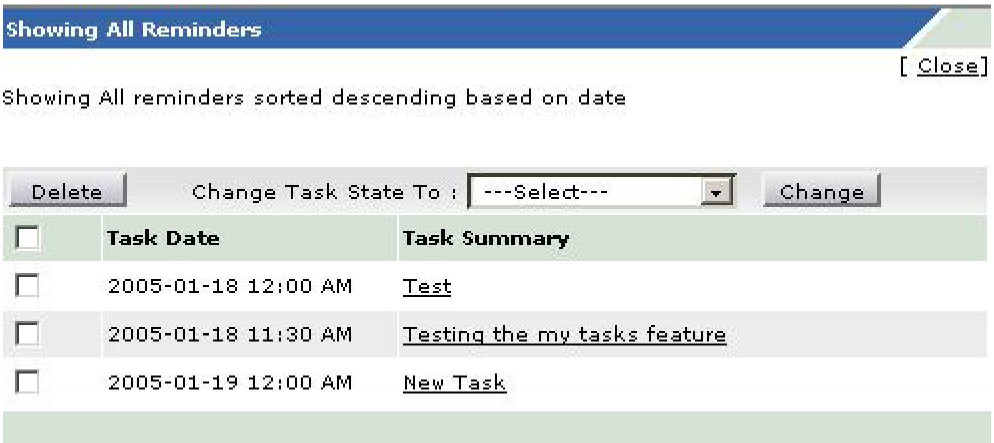
3. To change the **date**, click the calender icon beside the date field and choose the date of your choice.
4. From the time combo box, choose the time at which the task is scheduled. The values in the combo box are available in a gap of 15 min time interval.
5. Enter the **Task Summary**.
6. Click **Add**. The new task is added and is listed along with the already existing tasks in the ascending order based on date and time.

When you have completed the task, you can just strike out the task to indicate that it is completed by selecting the check box beside the task summary. Alternatively,

1. Click the hyperlinked task summary. An edit task form is opened.
2. In the **Task State** field, select **Completed**.
3. Click **Edit**. The task is struck through to indicate that it is completed.

You can also change the task state by executing the following steps:

1. Click **Show all** at the bottom right of the **My Tasks** note. The **All Reminders** window opens.



2. Select the check boxes beside the **Task Date** of the tasks for which you wish to change the state.
3. From **Change Task State To:** combo box, select **Completed**.
4. Click **Change**. The task state is changed in the **All Reminders** window. To view the changes in the ServiceDesk Plus home page, refresh the page.
5. Click **Close** in the **All Reminders** window.

You can delete a task by clicking the delete icon beside the task. Alternatively,

1. Click the hyperlinked task summary. An edit task form is opened.
2. Click the **Delete this Task** link available at the top left corner of the window.

You can also delete the tasks by following these steps:

1. Click **Show all** at the bottom right of the **My Tasks** note. All Reminders window opens.
2. Select the check boxes beside the **Task Date** of the tasks for which you wish to change the state.
3. Click **Delete**. The task is deleted from the **All Reminders** window. To view the changes in the ServiceDesk Plus home page, refresh the page.
4. Click **Close** in the **All Reminders** window.

The advantage of moving the task to completed state instead of deleting it completely is that, you can revert the state of the task to **Open** again and edit its attributes. But once you delete the task, it is completely removed from the application and cannot be retrieved.

Note: The **My Tasks** option is available for requesters accessing ServiceDesk Plus through Self-Service Portal also.

System Log Viewer

You can view the error logs generated by the ServiceDesk Plus application online.

To view the error logs

1. Log in to the ServiceDesk Plus application using your user name and password. If you have the permissions to view the support information, you will see a **Support** tab in the header.
2. Click the **Support** tab in the header pane.
3. Click the **System Log Viewer** link available in the Support page.

To view the individual error details

1. In the **Error Log** list view page, click the hyperlinked **Error Message**. An error log window with the details of the error is opened.
2. The **Error Message** field contains the complete error message.
3. The **Module** field indicates the module in which the error occurred.
4. The **Occurred At** field indicates the date and time when the error occurred.
5. If the probable cause of the error is known, then the cause is displayed in the **Probable Cause** field.
6. The **Performed By** field indicates the origin of the error. For example, if it is a system-generated error, then the Performed By field contains System as its value.
7. Click **Close** after viewing the details of the error message.

None of these fields are editable. You can also search for a specific error log details with the help of the **Search in** feature.

To search for error logs

1. In the left menu, the search block is found at the bottom. If you are in the Error Log list view page, then by default, the **System Log** option is chosen in the **Search in** combo box. If not, then choose **System Log**.
2. In the **Enter Keyword** text field, enter the search string.
3. Press **Enter** on your keyboard or click **Go**. The search results will display all the error logs that match the search string.
4. Click the error log of your choice to view the same.

You can delete these error logs.

To delete individual error logs

1. In the **Error Log** list view, select check boxes beside the **Error Messages** that you wish to delete.
2. Click **Delete**.

If you want to delete all the existing error messages, then click the **Delete All** button.

Changing Password

Apart from the option of changing password from the user management configurations, you can also change your individual password by following these steps:

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Just above the tabs in the header pane, click the **Change Password** link beside the **Logout** link. The **Change Password** window is opened.

3. Your login name will be displayed. Enter your old password in the **Current Password** field.
4. Now enter your new password in the **New Password** field.
5. In the **Confirm New Password**, enter the new password again.
6. Click **Change Password**. A message that the new password is updated is displayed.
7. Click **Close**.

Recent Items

When you are using the ManageEngine ServiceDesk Plus application, the application tracks your last viewed items and lists them in the **Recent Items** block on the left side. This has a list of the last 10 items that you viewed in the application, with the latest viewed item appearing on the top of the list. Clicking the hyperlinked item takes you directly to the item's details.

Back up and Restore

- In Windows
- In Linux

In Windows

Follow the steps given below to take a back up of the ManageEngine ServiceDesk Plus data:

1. Click **Start -> Programs -> ManageEngine ServiceDesk Plus 4 -> Backup Data**. A back up of the data and the file attachments that have been added to the application will be created.

The back up file will be created in the *<ServiceDesk>\backup* directory. The file name for the back up file will be of the pattern BackUp_monthdate_year_hr_min.data. An example of the back up file name: **BackUp_May20_2005_23_15.data**

To restore the back up data

1. Go to *<ServiceDesk>\bin* directory.
2. Execute the file **restoreData.bat** at command prompt as shown below:

   restoreData.bat <backup file name>

The back up file name has to be the .data file from which you wish to restore the data. This will restore the data from the back up file.

Note: The ServiceDesk Plus server needs to be shut down before you restore the data.

In Linux

Follow the steps given below to take a back up of the ManageEngine ServiceDesk Plus data:

1. Go to *<ServiceDesk>/bin* directory.
2. Execute the **backUpData.sh** file as given below:

   $ sh backUpData.sh

The back up file will be created in the *<ServiceDesk>/backup* directory. The file name for the back up file will be of the pattern BackUp_monthdate_year_hr_min.data. An example of the back up file name: **BackUp_May20_2005_23_15.data**

To restore the back up data

1. Go to *<ServiceDesk>/bin* directory.
2. Execute the file **restoreData.sh** at command prompt as shown below:

   $ sh restoreData.sh <backup file name>

The back up file name has to be the .data file from which you wish to restore the data. This will restore the data from the back up file.

Note: The ServiceDesk Plus server needs to be shut down before you restore the data.

Changing Web Server Port

- In Windows
- In Linux

In Windows

Follow the steps given below to change the web server port where the ServiceDesk Plus server will be running:

1. Go to <*ServiceDesk*>*\bin* directory.
2. Execute the file **changeWebServerPort.bat** at command prompt as shown below:

   changeWebServerPort.bat <new port number>

   The web server port will be reset to the new port number that you have specified.
3. If the port number is occupied, you will be prompted to enter a different port number. If you do not wish to enter a different port number then press **N** on your keyboard to exit the application. Else press **Y** and enter a different port number that is unoccupied.

This change will be effected only when you restart the server. To connect to the ServiceDesk Plus server after restarting, the new port number must be used.

In Linux

Follow the steps given below to change the web server port where the ServiceDesk Plus server will be running:

1. Go to <*ServiceDesk*>*/bin* directory.
2. Execute the file **changeWebServerPort.sh** at command prompt as shown below:

   $ sh changeWebServerPort.sh <new port number>

   The web server port will be reset to the new port number that you have specified.
3. If the port number is occupied, you will be prompted to enter a different port number. If you do not wish to enter a different port number then press **N** on your keyboard to exit the application. Else press **Y** and enter a different port number that is unoccupied.

This change will be effected only when you restart the server. To connect to the ServiceDesk Plus server after restarting, the new port number must be used.

Troubleshooting

This section gives you solutions for the problems faced while scanning for workstations in ServiceDesk Plus Inventory module.

1. Either access denied for the user or the remote DCOM option might be disabled in the workstation.
2. User does not have the access privileges to perform this operation.
3. Remote DCOM option is disabled in the Server machine.
4. Connection to RPC server in the workstation failed.
5. One of the WMI components is not registered properly.
6. Execution failure in the WMI Service of workstation.
7. WMI Service is disabled in the workstation.
8. Request for scan operation rejected by the workstation.
9. Connection to Telnet Service in the workstation failed.
10. Either Username or Password is incorrect in the workstation.
11. Scan operation Timed out.
12. The operation invoked is not supported in the current platform.
13. General failure while performing the operation.

<table>
<tr><th>Error Message</th><td>Either access denied for the user or the remote DCOM option might be disabled in the workstation</td></tr>
<tr><th>Cause</th><td>This error message is shown when scanning of a Windows workstation fails due to any of the following reasons:
1. The login name and password provided for scanning might be invalid in the workstation.
2. Remote DCOM option might be disabled in the remote workstation.</td></tr>
<tr><th>Resolution</th><td>1. Check if the login name and password are entered correctly.
2. Check if Remote DCOM is enabled in the remote workstation. If not enabled, then enable the same.

To enable DCOM in Windows 2000 Computers:
1. Select Start > Run
2. Type DCOMCNFG in the text field
3. Click OK.
4. Select Default Properties tab
5. Check the box "Enable Distributed COM in this machine"
6. Press OK

To enable DCOM in Windows XP Computers:

7. Select Start > Run
8. Type DCOMCNFG in the text field</td></tr>
</table>

	9. Click OK 10. Right Click on Component Services > Computers > My Computer 11. Click Properties 12. Select Default Properties tab in the frame that pops 13. Check the box "Enable Distributed COM in this machine" 14. Press OK 3. Check if the user account is valid in the target workstation. For this execute the following commands in the command prompt (of the server machine). net use \\<RemoteComputerName>\C$ /u:<DomainName\UserName> "<password>" net use \\<RemoteComputerName>\ADMIN$ /u:<DomainName\UserName> "<password>" Replace the relevant value within <>. Supply password within the quotes. If these commands show any error message, then the provided user account is not valid in that remote computer.

Error Message	User does not have the access privileges to perform this operation
Cause	Such error messages are shown, if the User ID provided for scanning does not have sufficient access privileges to perform the scanning operation. Probably, this user does not belong to the Administrator group of the workstation.
Resolution	Move the user to the Administrator Group of the workstation (or) Scan with an administrator (preferably a Domain Administrator) account.

Error Message	Remote DCOM option is disabled in the Server machine
Cause	Remote DCOM option might be disabled in the machine running ServiceDesk Plus Server.
Resolution	ServiceDesk uses Windows Management Instrumentation (WMI) to scan the remote workstations. WMI works over Remote DCOM and hence this option must be enabled for scanning the remote machines. To know how to enable DCOM in Windows system refer to resolution of the error message Either access denied for the user or the remote DCOM option might be disabled in the workstation.

Error Message	Connection to RPC server in the workstation failed
Cause	This message is shown when a firewall is configured on the remote computer. Such exceptions mostly occur in Windows XP (SP-2), when the default Windows Firewall is enabled.
Resolution	Disable the default Firewall in the workstation. To disable the Firewall in Windows XP (SP2) 1. Select Start->Run 2. Type Firewall.cpl 3. Click OK. 4. In the General tab, click Off. 5. Click OK. If Firewall cannot be disabled then, we can lauch Remote Administration feature for administrators in the remote computer. The following command when executed in the target computer, can enable the feature: netsh friewall set service RemoteAdmin After scanning the computer, if required, the Remote Administration feature can also be disabled. The following command disables the feature: netsh friewall set service RemoteAdmin disable

Error Message	One of the WMI components is not registered properly
Cause	This message is shown if WMI is not available in the remote windows workstation. This happens in the Windows 9x, Windows NT and Windows ME. Such error codes might also occur in higher versions of Windows if the WMI Components are not registered properly.
Resolution	Install WMI core in the remote workstation. This can be downloaded from the Microsoft web site. If the problem is due to WMI Components registration, then register the WMI dlls by executing the following command at command prompt: winmgmt /RegServer

Error Message	Execution failure in the WMI Service of workstation
Cause	Such error messages are shown, when there are some internal execution failures in the WMI Service (winmgmt.exe) running in the remote workstation. Probably the last update of the WMI Repository in that workstation could have failed.

Resolution	Restart the WMI Service in the remote workstation. To restart the WMI service in the workstation 1. Click Start -> Run. 2. Type Services.msc 3. Click OK. 4. In the Services window that pops-up, select "Windows Management Instrumentation" service and right-click on that. 5. Click Restart.

Error Message	WMI Service is disabled in the workstation
Cause	This error message is shown when the WMI Service (winmgmt.exe) is not enabled in the remote workstation.
Resolution	Modify the property of WMI Service to Manual or Automatic from Disabled. 1. Click Start -> Run. 2. Type Services.msc 3. Click OK. 4. In the Services window that pops-up, select "Windows Management Instrumentation" service and right-click on that. 5. Click Properties. 6. If the Startup type is "Disabled", change it to "Automatic/Manual" and start the service. 7. Restart the service.

Error Message	Request for scan operation rejected by the workstation
Cause	DCOM settings in Registry of the target workstation reject the scan request.
Resolution	Edit the Registry key value, as described below: 1. Use Regedit to navigate to: HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\OLE. 2. Double-click the EnableDCOM value Name, a string (REG_SZ) data type. Set its data value to Y, even if it is already SET to Y. 3. Click OK 4. Shutdown and restart the computer.

Error Message	Connection to Telnet Service in the workstation failed
Cause	Telnet Service might not be running in the target computer (or) Telnet Service is not running in default port 23.
Resolution	Discovering remote Linux Machines by ServiceDesk is done using Telnet. Ensure that Telnet is running in the remote workstations in the default port 23.

Error Message	Either Username or Password is incorrect in the workstation
Cause	The username and password provided to scan the remote workstation is incorrect.
Resolution	Discovering Linux Workstations, in ServiceDesk Plus is done using the Telnet. Provide a valid username and password that can successfully establish a telnet session with the target workstation.

Error Message	Scan operation Timed out
Cause	Target workstation did not respond within the default time limit. This might be due to some delay in the network.
Resolution	Try scanning the workstation, sometime later. If the same error message repeats, contact ServiceDesk Plus Support Team at support@servicedeskplus.com.

Error Message	The operation invoked is not supported in the current platform
Cause	Such error codes are shown if the workstation has an Operating System other than Windows or Linux.
Resolution	Currently, Network Discovery in ServiceDesk Plus supports Windows or Linux machines, only.

Error Message	General failure while performing the operation
Cause	Some unexpected exception occurred while, scanning the workstation.
Resolution	Contact the ServiceDesk support team at support@servicedeskplus.com with the Error log files. You can obtain the error log files from **Support** tab by clicking on the **Support File** link in the ServiceDesk Plus application.