ManageEngine ServiceDesk Plus
Admin Guide

ManageEngine
ServiceDesk *plus*
Helpdesk and Asset management Software

AdventNet
Excellence Matters

Table Of Contents

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 **ServiceDesk_Plus_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 5**.

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 **Registration for Technical Support** form is displayed. This is an optional form and this enables you to register for technical assistance. By registering, it helps the technical support team to be better informed about your organization and its specific needs and hence provide a more focused support. Enter the details such as **Name**, contact **E-mail ID**, **Phone Number** (helps in making calls for immediate support), **Company Name**, and **Country**.

10. Click **Next**.

11. 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 5
    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.

12. After you confirm the above details, the application is installed. On successful installation, the following screen is displayed.
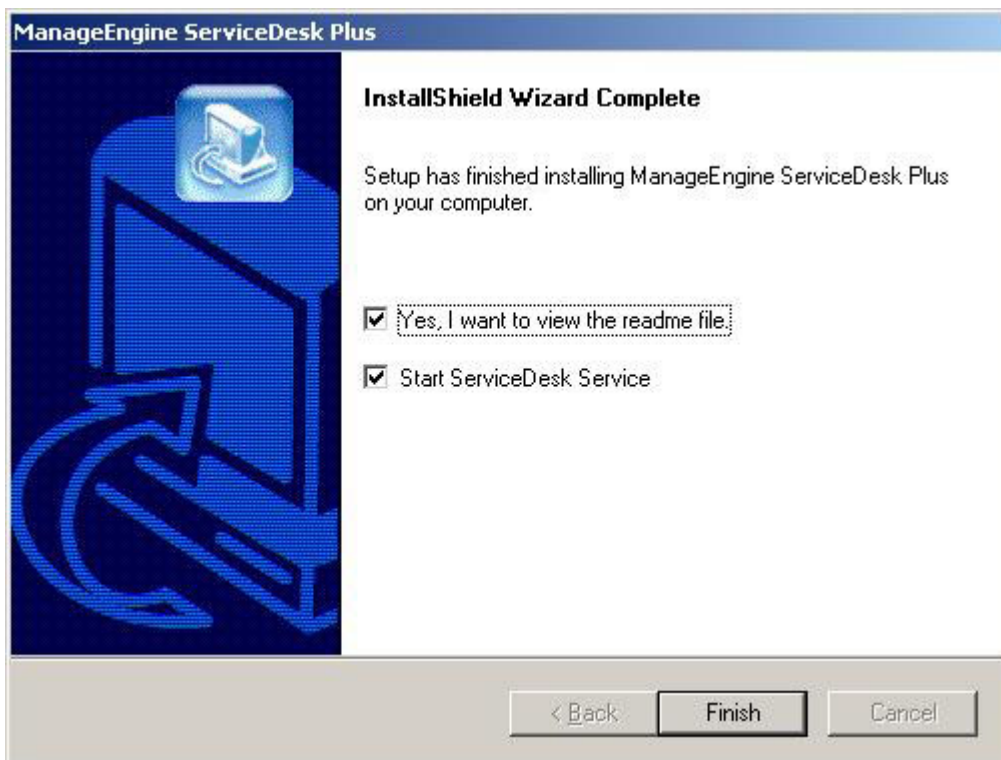
When you choose to start the ServiceDesk Service, the ServiceDesk Server is started automatically and the client window opens. If you do not wish to view the readme file or start ServiceDesk as a windows service, de-select the options provided.

13. 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 5 -> 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 5 -> ServiceDesk Web Client** to start the web client. The application opens the login page in your default web browser.

3. Enter your **user name** "administrator" and **password** "administrator" 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 5 -> 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 **ServiceDesk_Plus_Linux.bin** file.

2. Execute the .bin as given below, at your command prompt:

   ./ServiceDesk_Plus_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.
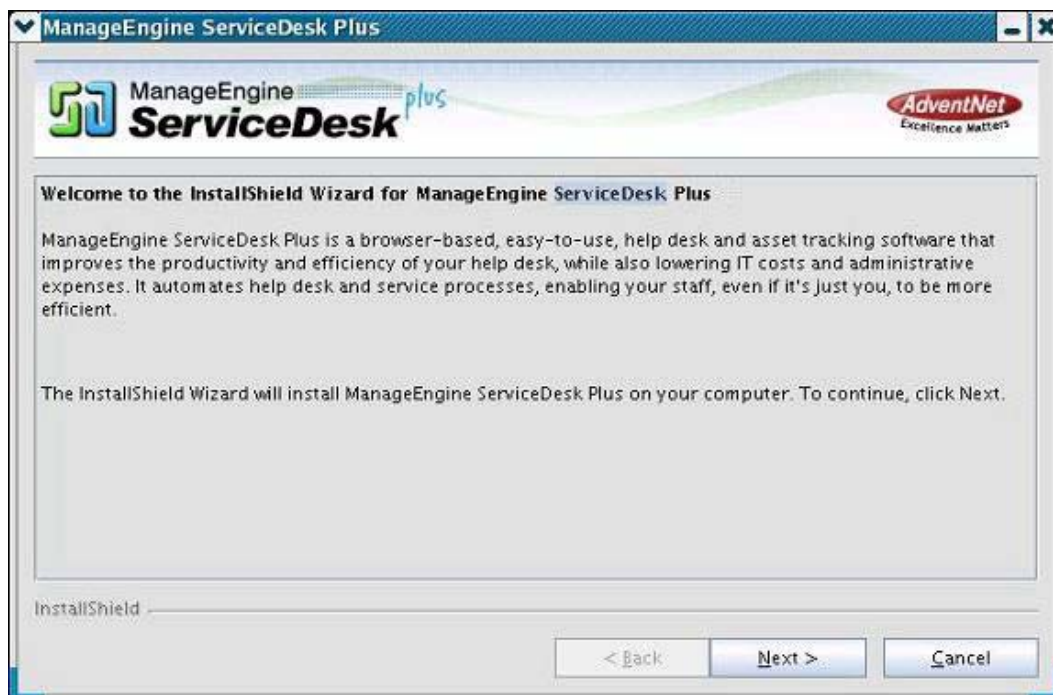
4. Click **Next** and follow the steps given in the installation wizard.

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 **Registration for Technical Support** form is displayed. This is an optional form and this enables you to register for technical assistance. By registering, it helps the technical support team to be better informed about your organization and its specific needs and hence provide a more focused support. Enter the details such as **Name**, contact **E-mail ID**, **Phone Number** (helps in making calls for immediate support), **Company Name**, and **Country**.

11. Click **Next**.

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

   Details of Installation
   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.

13. After you confirm the above details, the application is installed. On successful installation, the following screen is displayed.
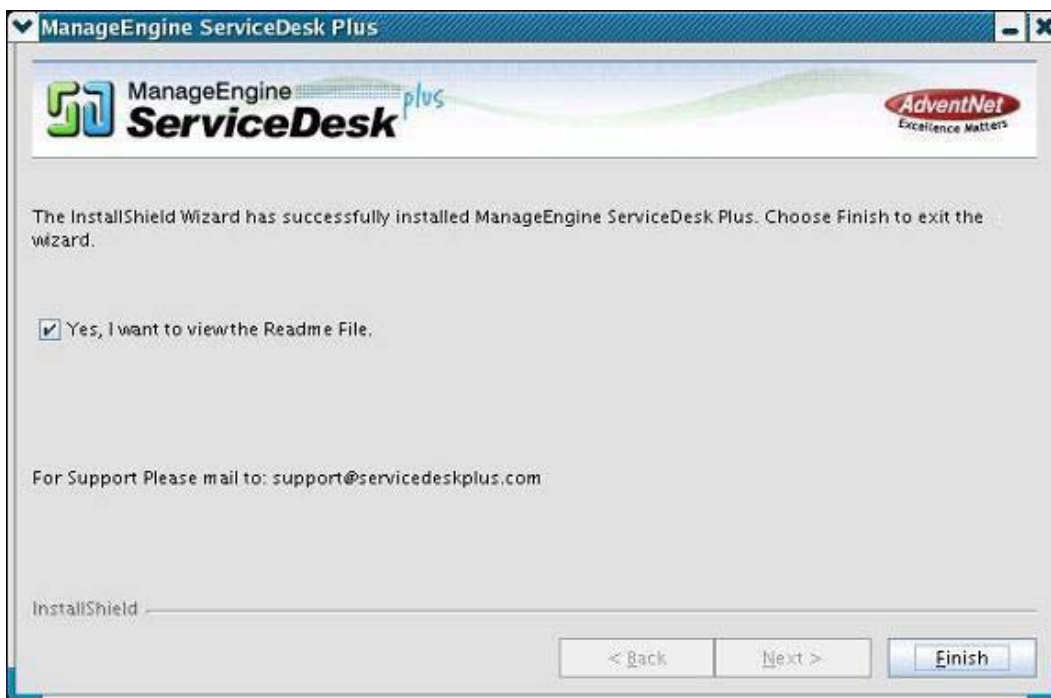
If you do not wish to view the Readme file, de-select the check box.

14. 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** "administrator" and **password** "administrator" 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.*

Database Configuration

By default ServiceDesk plus supports **MY SQL database** to switch over to **SQL database** you need to configure SQL server to establish connection and start the server.

Configuring MS SQL Server

1. Execute the changeDBServer.bat [changeDBServer.sh for Linux] file presented under the ServiceDesk Home. This opens the **Database Setup Wizard** page. Fill in the details of the form to configure sql server.

   Server Type: Select the server type from the combo box. Say MS SQL.
   Host Name: Enter the IP Address/host name in which the database is available. The default host name is 'localhost'.
   Port: Specify the port in the given text field. The default value is 1433.
   Database : By default the database name will be servicedesk in non-editable format.
   User Name: Specify the user name to login to the server in the given text field.
   Password: Specify the password for the username in the given text field.

2. To check the availability of connection press the **Test** button. A pop up window pops up showing **'Connection Established'** message.

3. Click **OK** to proceed.

4. Click **Save** button to save the SQL server settings.

Configuring MYSQL Server

1. If you are using a remote MySql server and do not want to use the inbuilt server then,

2. Select **Server Type** as MySql server. This opens the database wizard page.

3. Specify the **Host Name, Port, User Name & Password.**

4. Click **Test** button and check the availability of the connection.

5. Once the **Connection is Established, Save** the details and start the server.

Non UI users

Run the changeDBServer.bat under command prompt by passing parameter like given below

>changeDBServer.bat --console

It will get the DB Server necessary information from the console.

Troubleshooting Tips

MY SQL Connection Resolution

Verify the following,

- Check if the MY SQL server is running.

- Check if the server name or the port number is misspelled or incorrect.

- If the MY SQL server is running in a remote machine then there may be a firewall blocking the port number you have entered.

- If none of the above mentioned issues matches then contact your system administrator.

MS SQL Connection Resolution

If a connection is refused and an exception is thrown by SQL Server as 'unable to connect the server' then there could be following reasons why this could happen such as,

- The server name is misspelled or the port number is incorrect

- The SQL server will not configured to use TCP/IP then in this case enable TCP/IP from SQL servers network utility application.

- If there is a firewall blocking the port 1433 on the server then you will not be able to connect to the server.

- To confirm the firewall block connect to TCP/IP use \"telnet<server_host>1433\"\n to confirm the block.

- SQL Server Instance is not currently supported by ServiceDesk and will be available in the feature release. You can also connect to SQL Server named instance once if you know the machine name and port of the named instance.

- Create new user with full privileges as shown below,
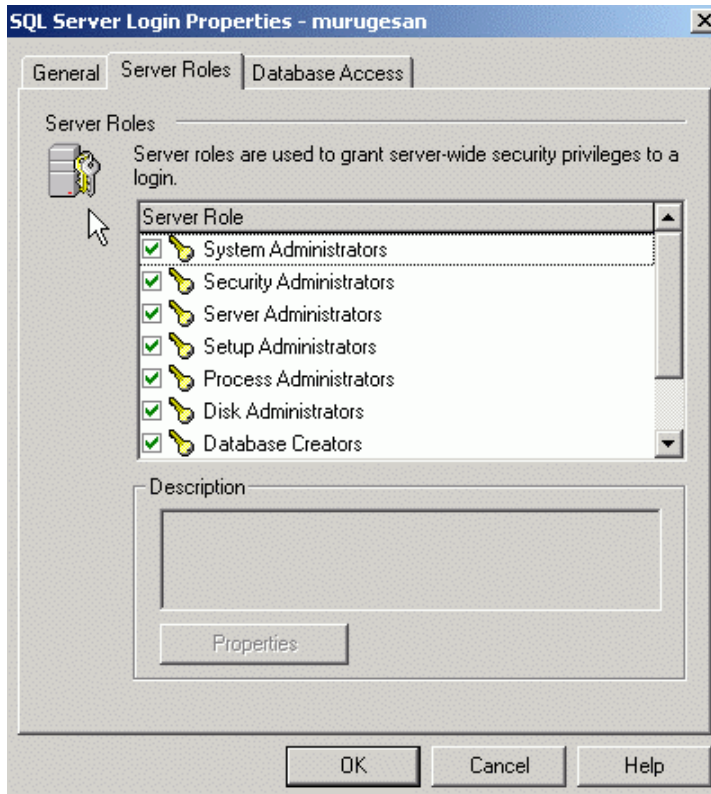
- While configuring SQL server properties select the authentication type as SQL server as shown below. Windows authentication is not supported by serviceDesk Plus currently.
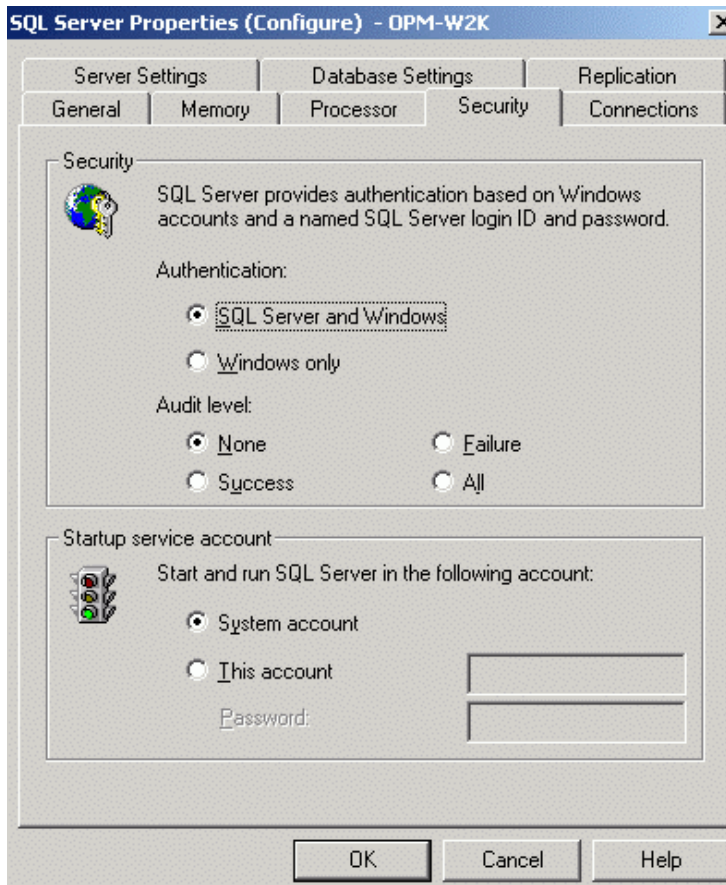
Uninstalling ServiceDesk Plus

- In Windows
- In Linux

In Windows

To uninstall ServiceDesk Plus from Windows

1. Click **Start -> Programs -> ManageEngine ServiceDesk Plus 5 -> 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. 5200 Franklin Dr, Suite 115 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

- Release Highlights
- Feature Enhancements
- Bug Fixes

Release Highlights

- Support for MSSQL backend database. Execute **changeDBServer.bat** script from <servicedesk_home>/bin directory to configure mssql database
- Tasks can be added to requests and different owners can be assigned for different tasks. This will help to handle requests with multiple workorders
- Role for Reports - Technicians can be given permission for Reports module without having administrative privilege
- Predefined Templates for requests - A configurable template to submit requests quickly with complete details
- Custom views : Ability to create user defined filter criteria for viewing requests
- Support for approval process for Requests
- Ability to configure mandatory fields while closing a request
- Support to edit multiple requests
- Support to save reply to request as draft and to send it for review
- Spell check utility in request reply
- Scheduled requester import from Active Directory - You will have an option here to choose the fields to import from AD
- Ability to disable requesters from editing their details in Self Service Portal
- Editing request, requester information from request details page itself
- Support to add new requester from request module, apart from adding from Admin module
- Support for inline images in solutions
- Category - Sub Category - Item hierarchy : A three level drill down for the category, which will populate the respective sub-categories on choosing a category and the respective items on choosing a sub-category
- Keep me Signed in - an option in the login page, which when enabled once, will directly take to the home page without the overhead of logging in again, unless the password is not changed

Feature Enhancements

- Department Head Role - A role which can be assigned to requesters which enables them to view the requests raised by other users from the same department
- Ability to notify technicians before the SLA for the request is violated
- Ability to customize SLA violation notification email
- Support to customize the Survey emails sent to requesters
- Add / Edit / View Notes added Requests from the Requests list view page. Also support for editing Notes is included
- An option to add resolution while adding the request. Also time spent entry can be provided when adding resolution to the request
- Support to merge multiple requests from requests list view page itself
- Option to choose the actual working date and time while adding Time Entries to Requests
- Option to send Email notification as soon as an announcement is posted
- Purchase approval role for approving / rejecting Purchase Orders
- Attachments made to contracts can be edited

Bug Fixes Over 5.5

- Assets associated with Purchase order loose association when the Asset Name is changed is fixed
- Department names are not listed in alphabetical order when a requester is added is fixed
- User info getting added as a requester even when a request is dropped in spam filter is fixed
- Ability to search contract based on contract id
- Request URL is not proper in the email notifications received is fixed
- Request getting added again when page refresh is done just after adding a new request is fixed
- Scan schedules are not saved properly is fixed
- Users list is not populated occasionally when allocating owner to asset is fixed
- Issue of new request getting created when a reply is made for thread acknowledgement is fixed
- Default values are not set when request are generated from Quick create is fixed
- Workstations are getting duplicated during scanning (due to IP address change) is fixed

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
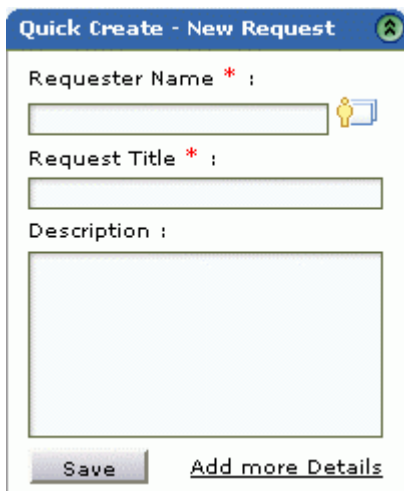
When system users need a service from the system administration team relating to the assets or any other service such as software installation and so on, they can send a request to the team. There are different modes of placing a request to the system administration team, such as web-based form, e-mail 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 or click the **New Request** button in the Request index page.

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 as shown below, Enter the **Requester Name**, **Request Title**, and **Description** in this form and click **Save**. You can select the requester name by clicking the user look up button beside the requester 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.

Apply Template

You can also quickly create a request using the request templates. Select any one the template relevant to the request from the **Apply Template** combo box. You also have the same templates listed under the **New Request** link. On selecting the template a request form with pre-filled values will be displayed, you have to just specify the **Name** in the form and click **Add Request** button to create a request.
If the required request template is not listed in the combo box, then create a new request. Also you can create a new request template using **Request Template** option in the admin tab.

Providing Request Details

In the new request form, the first block - **Request details** has information regarding the request, such as status of the request, mode of request submission, request level and priority of the 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 can also be assigned. If unsure the default entry can be left as is.

Based on the level the **Priority** of the request also changes.

Assigning Request to Group/Technician

You need to provide the owner for the request. You can assign request to a specific Group and / or a technician. Under the **Owner Details** block, you can choose the Group to be set to the Request and / or choose the technician. When Group is selected, technicians associated with the Group alone will be listed in the Technician drop down list.

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 **Requester List** window pops up.

2. From the above list of requesters, click the hyper-linked requester **Name** to choose 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. You can also add new requester directly by clicking the **Add Requester** button from the requester list page.

5. And also you can edit the requester details directly from this page by clicking the edit icon 🖉 beside each of the requester name in the list.

Classifying Request Category

Under the **Category 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.
Select the relevant **Sub-Category** from the combo box. Also select the relevant **Item** from the combo box.
Specify the subject line to be displayed while sending the request in the **Subject** text field. The subject line will be displayed as the request title hence this is a mandatory field.

Describe Request

Once you have specified the details for the request, you need to describe the request in detail. 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 **Attach a file** button beside the Attachments field. This opens an **Add/Remove 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** button. The selected file will be listed below the **Attached Files** heading. 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 10 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.

Adding Resolution for a Request

You also have an option to add resolution to the request in the new request form. If you have an answer or solution for the request you can quickly add in the resolution text field and add it to the request.

The purpose of having resolution in the new request form is, when a technician is reported about a problem which has been already cleared by him/her then, in this case he can create a new request, specify the solution in the resolution field, set the status as closed and he can close the request. Thus this option makes the job easier for the technician to specify the resolution and close the request immediately. To add resolution, Click the **Resolution** title in the new request form. This opens the **Resolution text field**. Specify the solution in the given text field and add to the request. Click the Resolution tab to view the solution you have given for the request.

Modes of Creating a Request

You can create a new request in one of the following methods:
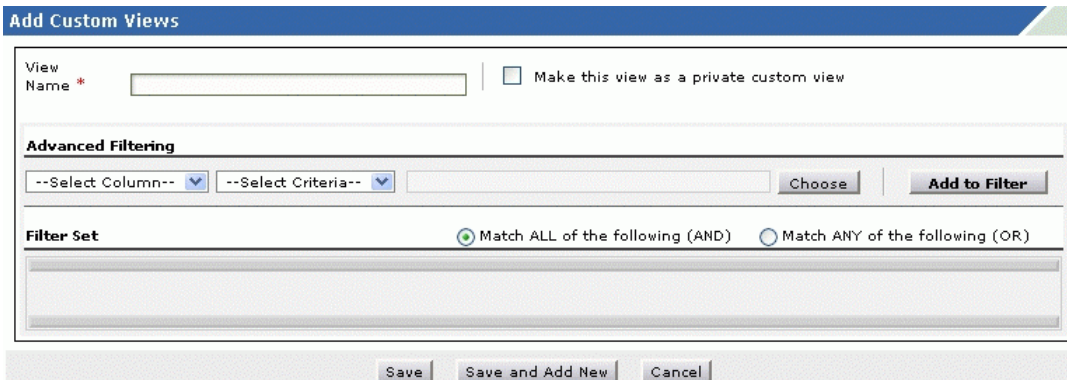
1. **E-mail** the request to the help desk team. This e-mail will be automatically converted to a new request in the ServiceDesk Plus application.

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.

There can be other modes of requests also by which requests can get created. For more information on how to add additional modes, refer to Configuring Mode section.

Creating Custom Views

You can create your own customized page to display the requests using Custom View option. You can specify the criteria to filter the selected requests that have accumulated in your requests list view page. This helps you to sort & view requests of your priority and requirement. To create your own custom view,

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 **Requests** list view page.

3. Click **Create Custom View** icon. This opens **Add Custom View** page as shown below,

4. Specify the **View Name** in the given text field. This is a mandatory field.

5. The administrators can make their views as private view or public view. By default the view will be public but to make this view as private custom view then select **Make this view as private custom view** check box.

   By default the technician without administrator log-in permissions can create only private views. Hence the above shown '**Make this view as a private custom view'** option will not be available for the technician log-in.

4. Specify the filter criteria by selecting the **column** and its matching **criteria** from the combo box. And select the matching data for the column by clicking the **Choose** button. Also select the **AND** or **OR** conditions by enabling either of the two radio buttons.

5. Click **Add to Filter** button to save the filter criteria details. The filter criteria details will be listed in the **Filter Set** block.

6. If you wish to add more filter conditions to this view then, select the required column, criteria & conditions of the filter.

7. Save the filter criteria details. To add another custom view click **Save and Add New** button.

Custom views will be listed in the **Filter showing** combo box in the Requests home page at the top below the title. On clicking the combo box the views marked as private will be listed under **My View** list and the public views will be listed under **Requests** list.

Manage Custom Views

You can view all your customized view using this option. You can also edit, delete, add new custom views using this option.

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 **Requests** list view page.

3. Click **Manage Custom View** icon . This opens **Manage Custom View** page with the list of all the created custom views.

Custom Views			
New Custom View	Delete		
☐	**Filter Name**		**Created By**
☐	My Hardware view		Administrator
☐	My Network View		Administrator

Editing Custom Views,

1. Click the custom view title or click the edit icon. This opens **Edit Custom View** page.
2. Edit the details and save the changes.

Deleting Custom Views,

1. Select the custom views to be deleted by enabling the check box. The public views can be deleted only by the administrators (ie: Only the administrators can make their view public other technicians without admin permissions can only create a private view).
2. Click the **Delete** button to delete the views. A pop up window pops up to get your confirmation on the delete operation.
3. Click **Yes** to proceed. You can see the view deleted from the list.

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. By default the page displays **Request**, **Resolution**, and **History tabs.**

In the request tab, the data is grouped in a logical manner. By default this page displays **Request Details, Requester Details, Subject of the request & Description** of the request. **The Request ID** is displayed on the top left corner of the page below the tabs. The **Status and priority** of the request is displayed on the top right corner of the page.

Note:You also have other blocks displayed in this page such as **Conversations, Discussion Notes & Time Spent** blocks. These blocks gets displayed on adding the same to the request.

Viewing Request Details

The **Request Details** block displays the Status, Group, Category, Sub Category, Item, Workstation, Created Date, Created By, Technician, Priority, Mode, Level and Due Date of the request. You have inline edit option to edit all the request details under this block. To edit the details click the link available for each of the request details against each field. Say for ex. If you wish to change the technician Jeniffer Doe to John Abraham for Request ID 14 then click the name of the technician and select the technician name from the list.

Viewing Requester Details

In the **Requester Details** block, the details of the requester such as the **Requester Name, Contact Number, Department, Email Address & Mobile Number** of the requester are displayed. You have inline edit option to edit all the requester details under this block. To edit the details click the link available for each of the requester details against each field.

Viewing Conversations

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. Click the **View Requester Conversations** link to view the history of all the conversations. Conversations are listed in the ascending order of the time. The conversation block is visible only if there have been any mail transactions between the requester and the technician.

Viewing Discussion Notes

Once you add a note to the request the **Discussion notes** gets displayed in descending order of their date of creation just below the Requester Details block. If you select the option "Show this notes to requester" then the note will be displayed as Public. Else will be listed as private.

You also have an option to edit or delete the discussion notes.

Cost of a Request

Finally, you can enter the **time spent** details for the request.

1. Click Add Time Entry button. The Add Time Entry dialog pops up.

2. Select the technician name from the **Technician Resolving This Request** list box. If you have already entered the per hour cost of the technician while creating the technician details, then that will be fetched and the total time spent on the request will be taken. If you wish to change these values, you can do so manually.

3. Specify the Date & time taken to resolve the request.

4. The **Technician Cost per hour** will be fetched from the technician details, which is a non-editable field.

5. Using the above two data, the Technician Charge is calculated as Time Taken To Resolve X Technician's Cost per hour.

6. If you wish you can enter a description for this time spent entry.

7. Click **Save**.

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.

Viewing Resolution

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

1. Click the **Resolution** tab next to the request tab.

2. The current available resolution for the request is displayed in this page. You have an edit option on the right side of the resolution. If there are no resolutions available for the request, then the blank text is shown for you to add the resolution if needed. To search for resolutions from the solutions database, click **Search Solutions** 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.

4. You also have an option to **Add Time Entry** to the resolution. Select Add Time Entry option by enabling the check box and specify the details.

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.

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 **Requests** tab in the header pane. This opens the **Requests** list.

3. Click the **Title** of the request which you want to edit. This opens the **View Request** page which list the **Tasks** that can be performed on the request.

4. Click the **Edit Request** link on the top of the page to modify the request details. This opens the request form in an editable format where you can add resolution while editing, change the status of the request from open to close, and also change the entire template to a new one apart from the regular editing of the request details.

   Alternatively, you also have an inline edit option to modify the request details in the view request page. Click the edit icon 📝 on the right side of each block which opens the request form fields in editable format. After modifying the values, save the changes. This comes in handy when you need to edit the values of the entire block say **Request Details** one by one.

Changing the Request Template

In the editable request form you have an option to change the existing request template to a new request template. Select the template of your need from the **Apply Template** combo box on the top right corner of the page. And the new request form gets displayed. Do the required changes and update the request.

Modifying the Request Details

In the editable request form you can change the request details, such as **level** of the request, **mode** 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-up 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 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.

Moving the request on holds helps in calculating the next time taken to solve the request excluding the idle time

Modifying Owner Details

You can modify the owner details of the request. If the request is set to a Group, then you can assign it to a technician in the Group or change the Group to which it has been assigned to. You can also edit the **Created Date** and **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. If the request has been responded, then the **Responded Date** is displayed beside the Created Date. This field is also 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

In the Category Details block of the edit request form, you can change the category, sub category and item of the request. If the same was not appropriately chosen at the time of submitting then the request can be selected now from the drop down list. Along with this you can also modify the Subject line of 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.

Modifying the Resolution

You can modify or also add new **Resolution to** the request in the resolution text field. This option makes it easier for you to specify the solution in the same page before closing the request.

Modifying Reason

Finally you have to specify the reason for updating the request in the **Reason** text field.

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.

Appending Attachments

If you wish to attach more files to the request, you can do it. Click the **Attach a File** button and attach as many files as you wish and click **Done**. You can also delete the attachments that were already available in the request by clicking the delete icon available beside the attachment.

Editing more than one Requests

You have an option to edit more than one requests simultaneously.

1. Select all the requests to be edited by enabling the check box from the request list view page.

2. Click **Edit** button. This opens **Edit Requests** page. The title displays the requests number that are grouped together to edit. Edit the **Request, Owner & Category details** of the requests.

3. Specify the **Reason for Updating the request** in the given text field.

4. Click **Update** button to save the changes.

This comes very useful when there are group of requests of same issue wherein the technician can select all the requests and edit the details in a single shot without editing each request one by one.

Closing Requests

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

__Note__: If the mandatory fields are not entered then an error message is shown asking you to enter the value for the fields.

Alternatively, change the status field to **Closed** when 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**.

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 requests you would like to pick up by enabling the check box. Click **Pick up** button. The selected request will be assigned to you. (Or)

4. You can also pick up requests after viewing the request details. Click the title of the request to open **View Request** page.

5. Click **Assign** tab. Select **Pick Up** option to pick up the request.

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. 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. This opens the view request page.

4. The **View Request** page lists the **Tasks** that can be performed on the requests on top of the page. Here click the **Assign** link and select the assign option. This opens **Assign Group and Technician** page as shown below.

    Based on the issue you can assign this request to the appropriate **Group** and as well as to the **Technician** who belongs to that group. Or you can select either of the one. If you wish to select the technician alone then choose the technician from the list and click **Assign** button to assign the technician to handle the request. And when the technician logs into ServiceDesk Plus, he/she would see this request in the **My Open Requests** list.

5. Alternatively, you can also assign technician using inline edit option. Click the technician name shown in the request details block. This opens the drop down box as shown below. Select the technician from the list and click the ☑ icon to select the technician name else click cancel icon.

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 requests to be assigned a technician by enabling the check box beside left side of each of the request title.

2. Select the **Assign to** check box. Select the technician from the drop down list.
3. Click **Assign** button to assign the technician**.**

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. This opens the view request page.

4. The **View Request** page lists the **Tasks** that can be performed on the requests on top of the page. Click the **Assign** link and select the **Assign** option from the list. Alternatively, you can also unassign technician using inline edit option. Click the technician name shown in the request details block. This opens the drop down box as shown below. Select the technician name from the list and click the ✔ icon to select the technician else click cancel icon.
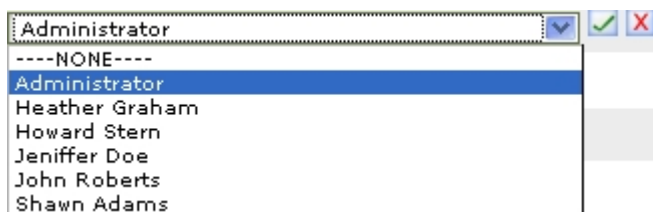
5. Now select the **NONE** option and click **Assign**. The request will be unassigned. If you do not wish to unassign the technician then you can just close the pop-up by clicking **Cancel**.

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.

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 Actions menu -> Select **Add Notes** option. This opens **Add Note** page as shown below,

5. Enter your content in the text box below the **Request ID**.

6. There are two types of notes that can be added to the request such as, **public & private.**

   Public Notes: Public notes can be viewed by the requesters & technicians.
   Private Notes: Private notes can be viewed only by the technicians (all the technicians).

   These notes can be added to the request by both the technician and the requester.
   By default the requester can add only a public notes.
   By default the technician can add only a private note but the technician also has an option to make his notes public.
   If you want the notes to be visible to the requesters (public), then select the **Show this notes to Requester also** check box. Else only the technicians will be able to view the notes (private).

5. If you want to notify the technician about the addition of the note, then select the check box, **E-mail the technician for notes addition**.

6. 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 can also edit or delete the notes that have been added.

Adding Tasks

Using add tasks option you can assign different tasks to different technicians. Say if a request sent by the requester involves multiple technicians work then the technician whoever received the request can assign different tasks to the different technician.
Example: When a new employee joins the organization a list of tasks needs to be performed such as, seating location, providing a system, installing operating system, connecting telephone links, entering his/her name in the active entry, etc. In this case you can assign different tasks to different technicians using add tasks option.
To add tasks,

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 tasks.

4. Click the **Actions** menu -> select **Add Tasks** option. This opens the **Tasks** window.

5. Specify the **Title** of the task in the given text field. This is a mandatory field.

6. Specify relevant information about the tasks in the **Description** field.

7. Select the **Scheduled Start Time** for the task based on the SLA from the calendar button. Also select the **Scheduled End Time** for the task from the calendar button.

8. You can also select the **Actual Start Time** and **End Time** of the task. The actual start time will be the time limit for the technician to start the work. After which the technician would over rule the SLA.

9. Select the **Owner** of the task from the combo box.

10. Specify the **Status** of the task.

11. Specify any relevant comment about the task in the **Comments** field.

12. If you wish to be reminded of the task previously then select the time duration from the **Remind me before** combo box.

13. **Save** the values. You can see a Tasks tab getting created next to the Resolution tab. All the tasks created for the request will be listed under the tasks tab in descending order. The tasks assigned to other technicians can be viewed in their **Task summary list** in the home page.

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. This opens the request list view page.

2. From the request list view page select the requests to be merged by enabling the check box. Click **Merge** button to merge the requests. All the merged requests appear as a single request. (Or)

3. Click the **Title** of the request that you wish to merge in the request list view page.

4. Click Actions link -> Click **Merge Request** option. This opens Merge this Request form as shown below,

5. You can search for specific request by providing a search string in the field provided above.

6. To confirm if the request that you want to merge is the correct one, you can view the request by clicking the title of the request.

7. Click the Merge Request icon to merge the two requests. A dialog box pops up asking for your confirmation to merge requests.

8. Click **OK** to merge request. All the merged requests will be displayed in the Conversations block of the view list page. And if you have attached notes, conversations and time-spent entry for the requests all the said information will be moved to the parent request.

9. Else if you wish to cancel merging click **Cancel** in both the dialogs to exit the Merge Request form.
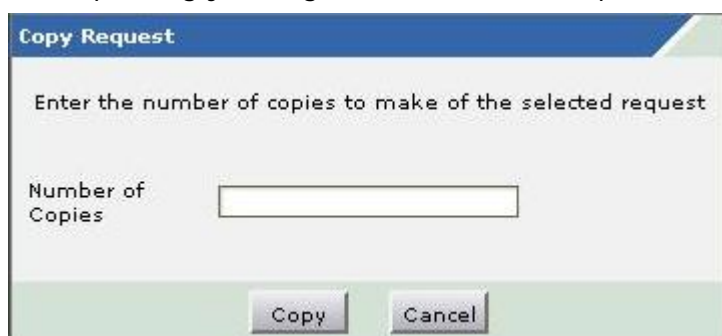
You can split a thread of a request into a new request. For more information on this, kindly refer to the section Request Conversations.

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. This opens the request list view page.

3. Click the **Title** of the request that you want to duplicate in the view list page.

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.

Copy Request

Enter the number of copies to make of the selected request

Number of Copies   [　　　　　　　　　]

[Copy]   [Cancel]

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.

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. A confirmation dialog pops up.

5. Click **OK** to proceed deleting. Click **Cancel** to abort deletion.

To delete more than one request at a time

1. In the requests list view page, select the check boxes in the row of the request that you wish to delete.

2. Click the **Delete** button. A confirmation dialog pops up.

3. Click **OK** to proceed deleting. Click **Cancel** to abort deletion.

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** menu item from the browser **File** menu.

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 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 no resolution is available for the request, then the plain html text page is displayed. Specify the resolution in the text field.
6. You can also add **Time Spent Entry** details for the request in this page.
7. **Save** the resolution. You can see the resolution is displayed in this page.
8. If you wish to add the specified resolution to the solutions database, then click **Save and Add to Solutions**, or else click **Save**.
9. On selecting **Save and Add to Solutions**, you get 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. If you wish you can edit the contents.
10. From the **Topic** drop-down list which contains all the available topics, select the relevant parent topic for the solution.
11. Enter relevant keywords for the solution in the **Keywords** text box. Separate each keyword by a comma. This option is provided for the users to improve the search capability and get appropriate solution for the problem.
12. If needed you can also attach files to the solution.
13. Click **Add**. This also adds the resolution to the list of solutions.

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 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.

Submit For Approval

You can submit the request for approval to the manager using this option. To submit for approval,

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. This opens **View Request** page.
4. Click the Actions tab -> select **Submit For Approval** option. Submit For Approval page pops up.
5. Specify the **To** address. This is a mandatory field.
6. Edit the **Subject** and specify relevant subject in the given field. This is a mandatory field.
7. Specify the relevant **Description** in the given text field. **$ApprovalLink** is a variable. It should be available with the mail to replace the variable with the link where you have the request details.
8. And send the mail for approval.

The manager gets the Request for approval mail with the link. On clicking the link it opens a form with approve or reject option & request details as shown below,
The manager has to approve or reject the request based on the requirement. And save the details. On Saving the decision you get a thank you message.

Then you can see the **Approvals** tab getting displayed in the **View Request** page next to **History** tab. It displays all the mails sent for approval in descending order with **Sent On, Sent To & Status** details of the requests.

Once the request is approved by the manager the status of the request changes to **Approved.** If rejected by the manager the status of the request changes to **Denied** as shown below,

Requests > **View request**

HARDWARE
Request ID : **13**

| Request | Resolution | Tasks | History | **Approvals** |

Approvals Details   Send For Approval

Sent On : 17 Feb 2007, 17:06:56   **Status** : ❌ Denied (1/1)

Sent On : 17 Feb 2007, 16:56:37   **Status** : 🔄 Pending Approval (1/1)

Sent On : 17 Feb 2007, 15:18:25   **Status** : ✅ Approved (1/1)

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.

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 **Reply** button just below the **Request Description** or the **Reply the Requester** link on the right-side **Tasks** block, under **Notify**. This opens the **Mail to the Requester** form.

5. Edit the **Subject** and **Description** of the e-mail.

6. Click **Attach a File** button to add files as attachments to the mail

7. 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.

By default, the email editor will be in HTML format. If you do not want the mail in HTML format, then select the radio button **Plain Text**. A confirmation dialog will open. Click OK to continue changing the editor to plain text.

	Note: While editing the subject of the e-mail, ensure that the request ID value remains intact with the # symbols beside it. Else, the threading of requests may not be proper.

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** button just below the **Request Description** or **Forward the Request** link on the right-side **Tasks** block, under **Notify**. This opens the **Forward Request** 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 e-mail.

7. Click **Attach a File** button to add files as attachments to the mail

8. 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 **Mail to Technician** form.

5. Enter the E-mail ID in the **To** field. This is a mandatory field.

6. Edit the **Subject** and **Description** of the e-mail.

7. Click **Attach a File** button to add files as attachments to the mail. All the newly attached files will be listed in the **Newly attached files** field.

8. Click **Send**. An e-mail is sent to the technician. To send the information to more people, enter their e-mail IDs in the **To** field or **CC** separated by comma.

9. You also have an option to **Save** the mail as draft copy for later use.

10. If you wish to send the drafted mail for review to the higher authority then click **Send for review** button.

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**. The **Mail to Technician** window opens with the **To** address displayed as **<mobile number>@<service provider>.com**. You can configure the service provider details in the admin configurations.

5. You can add your message to this or edit the description to contain only those information that you wish to send.

6. Click **Send**. 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.

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 **Expand all** link in the top right corner of this block. If the conversations / threads are in the expanded view, then the Expand all link is replaced with the **Collapse 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 **Expand 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 **Expand 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.

Viewing Request Based on Filters

Viewing Requests Based on Filters

ManageEngine ServiceDesk Plus allows you to view the list of requests and also set a time period for auto refreshing the request list view page.

To auto refresh the list view page

1. Log in to the ServiceDesk Plus application using your user name and password.

2. Click the **Requests** tab in the header pane. In the **Requests** list page, just below the header links, top right corner, you will see an editable field, **Refresh this page**. By default, the value is set to **Never**.

3. Click the edit icon beside the value **Never**.

4. From the drop down list select the frequency of refreshing the page.

5. Click Set.

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):

   Show [10 ▾] per page

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

You have three different filter categories to view the specific set of requests. The filter categories are, **My Group**, **Requests** & **My Views**. To view the requests listed under these specified filter categories,

1) Click the **Requests** tab in the header pane. This opens the **Requests** list page.
2) Select the **Filter Showing** combo box. You can see the list of all filters. Select the filter from the list based on your priority.

My Group

All your incoming requests can be grouped under different groups based on the classification set by the help desk team. The groups are created using the groups option in the admin tab. The requests which matches the group criteria will be listed under the particular group option as shown below,
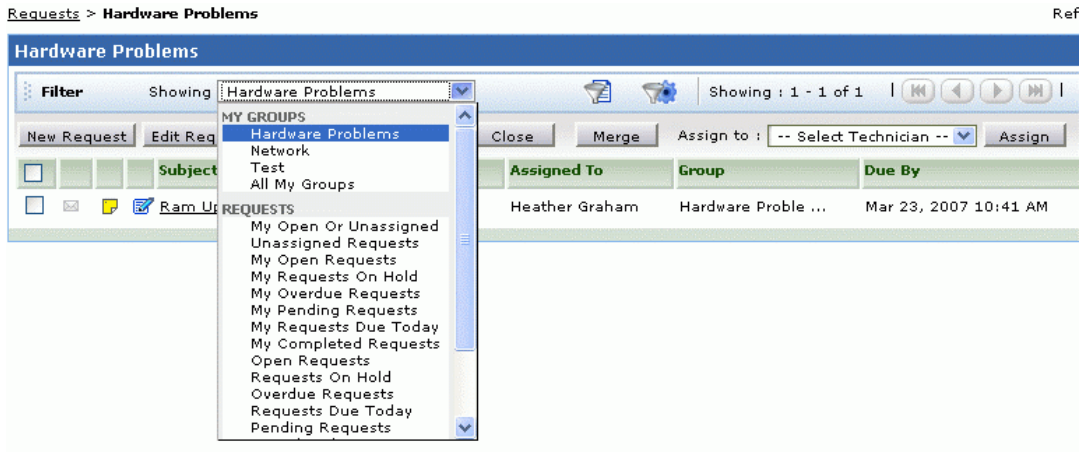
Requests

All the incoming requests will be classified under different titles. These request titles are listed under the **Requests** option. On selecting the specific title of the request, corresponding set of requests gets listed.
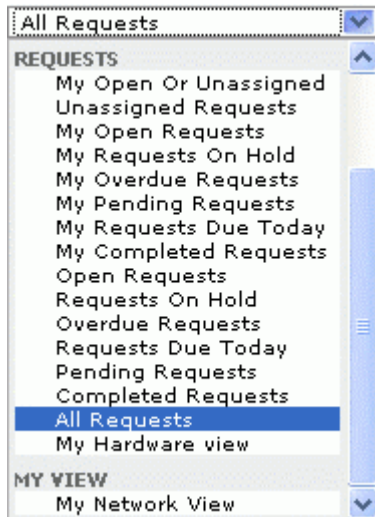
My Open Or Unassigned Requests

All your open requests & the requests that are not assigned to any technicians will be listed under this option.

Unassigned Requests

All the requests that have not been assigned to any technician will be listed under this option.

My Open Requests

When you click the requests tab, this filter is selected by default and lists all the request that are assigned to you in the open status.
In addition to this if you have any requests placed in Groups, then you will also have option to filter the requests based on a specific Group alone. You can also perform a column sort of the requests.

My Requests On Hold

All your assigned requests that are kept on hold will be listed under this option.

My Overdue Requests

All your assigned requests that have crossed the scheduled time will be listed under this option.

My Pending Requests

All your assigned unfinished requests are listed under this option.

My Requests Due Today

All your assigned requests that are due for the current day will be listed under this option.

My Completed Requests

All your assigned requests that are closed will be listed under this option.

Open Requests

All the open requests irrelevant of the technician will be listed under this option.

Requests On Hold

All the requests that are kept on hold irrelevant of the technician will be listed under this option.

Overdue Requests

All the requests that have passed due by time irrelevant of the technician will be listed under this option.

Requests Due Today

All the requests that are due for the day irrelevant of the technician will be listed under this option.

Pending Requests

All the unfinished requests irrelevant of the technician will be listed under this option.

Completed Requests

All the closed requests irrelevant of the technician will be listed under this option.

All Requests

All requests on all status say (closed, pending, open) will be listed under this option.

My Hardware View

All the requests that are assigned to you and has hardware issues will be listed under this option.

My View

All your customized views gets listed under the my view list.
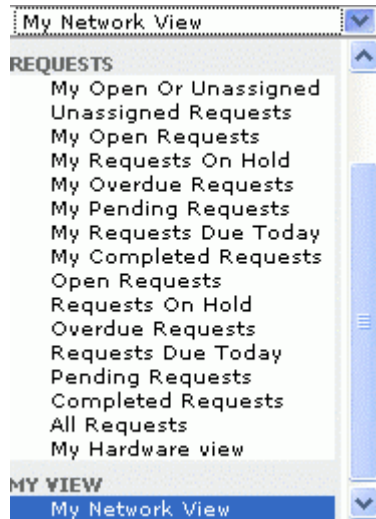
Sorting Requests by Column

To sort request by column, click the column header. Clicking it once will sort it in ascending order. Clicking twice will sort the column in descending order.

Customizing Request List View

ManageEngine ServiceDesk Plus allows you to customize the request list view to include columns of your choice.

To customize the list view

1. Log in to the ServiceDesk Plus application using your user name and password.

2. Click the **Requests** tab in the header pane.

3. Click the column edit icon available at the corner of the request list headers. This opens the available columns that can be displayed in the list view. All those that are visible currently, will have the check box beside them selected.
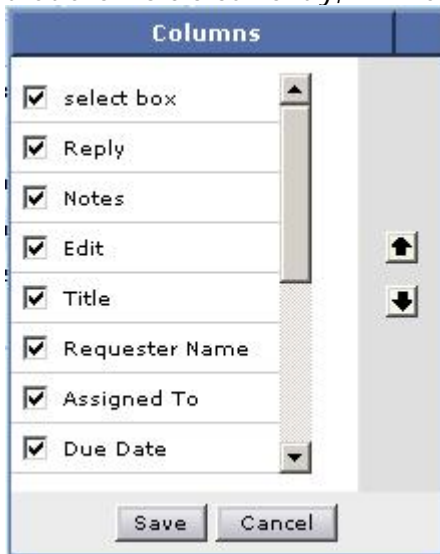
4. To remove a column, remove the selection from the respective check box beside the column name.

5. To add a column to the list view, select the unchecked select box beside the column name.

6. To change the column order, click the up and down arrow after selecting the column that you wish to move.

7. Click **Save**.

This will add only those columns which you have chosen in the list view.

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.

You can also do a column-wise search of the requests. To perform a column-wise search

1. Click the search icon at the end of the request list view headers. This opens the search field just below every column that is visible in the list view.

2. Enter the search key in field under the column of your choice.

3. Click **Go**. The search results matching the search string(s) are displayed.

> **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 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.
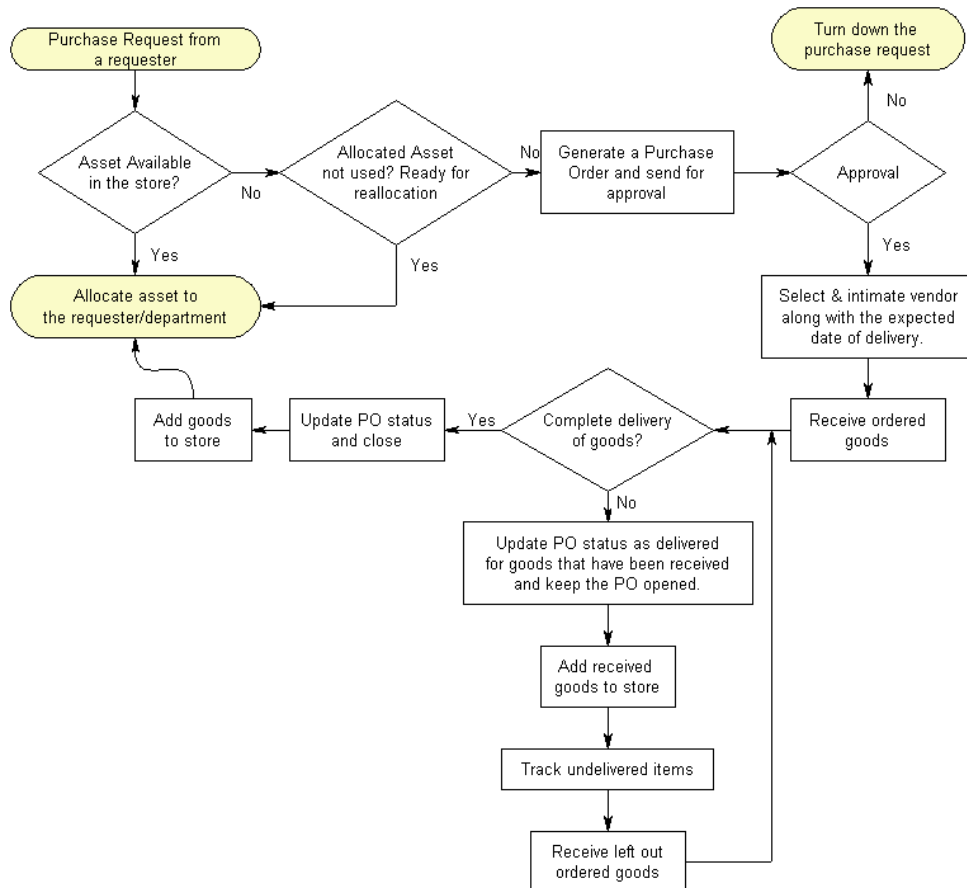
Work flow describing the various stages of an asset from the point of allotment till its disposal or replacement.
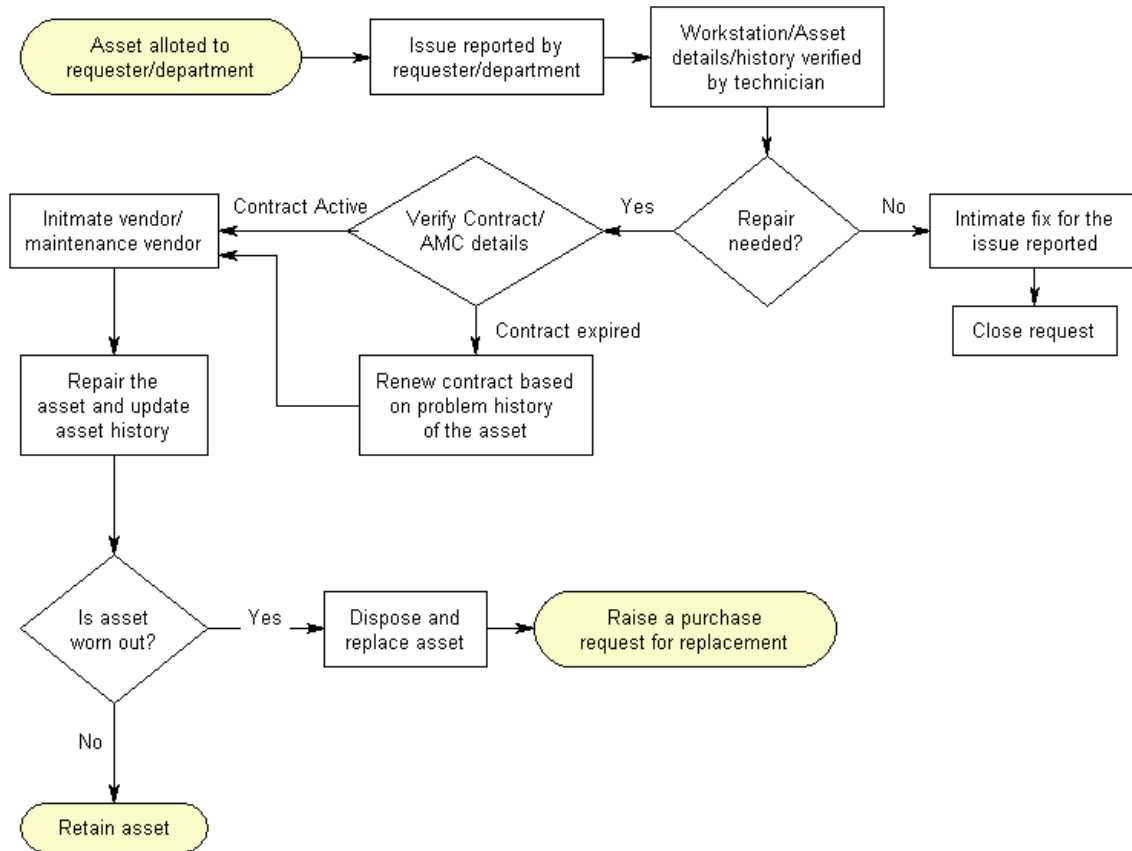
Scanning a New Workstation

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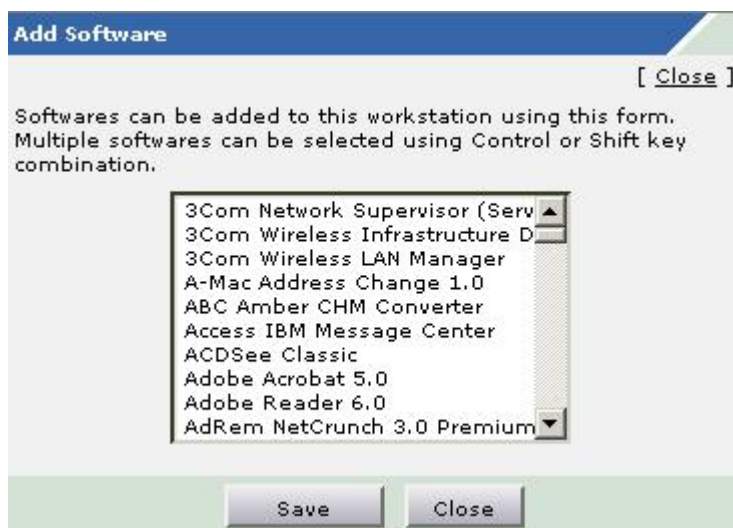
4. After selecting, click **Save**. The selected software is appended to the existing workstation software list.

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.
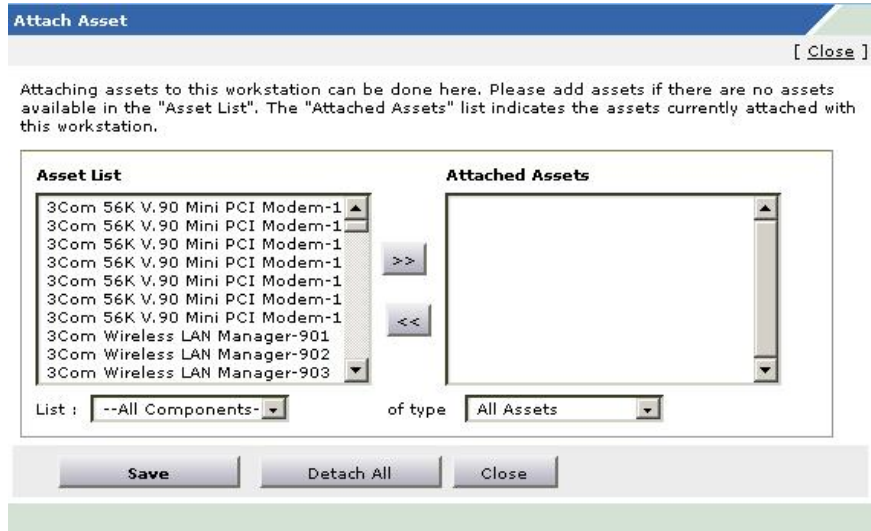
2. If you want only specific assets to be listed, you can choose them from the list combo box, which is a filter for the asset list values.

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.
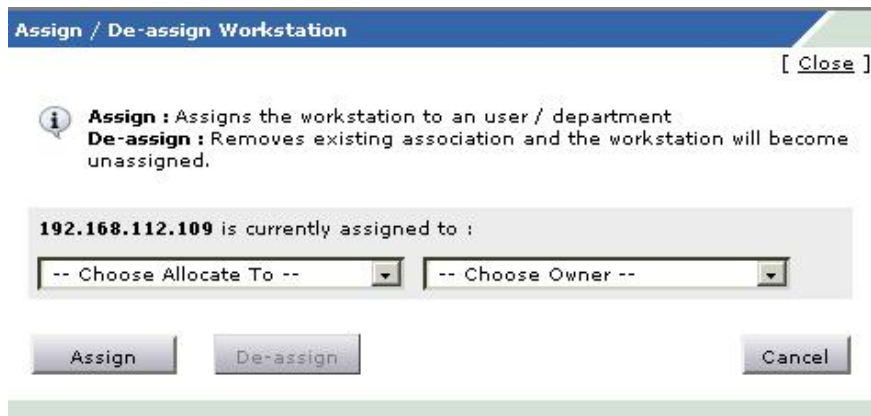
3. From the first combo box, choose either **User** or **Department** as values. This populates the second combo box with the relevant values of either the available user names or department names based on your choice.

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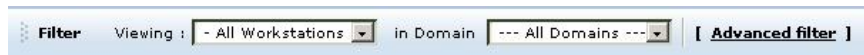
5. Selecting a domain name in the **Domain** combo box lists the workstations from that domain.

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.
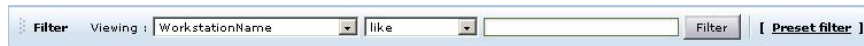
2. The first combo box in the above image lists all the probable workstation attributes based on which you can set the filter criteria. Choose the filter criteria from this.

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.

Customizing Software List View

ManageEngine ServiceDesk Plus allows you to customize the software list view to include columns of your choice.

To customize the list view

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 **Scanned Software** link from the **View** block on the left menu.
4. Click the column edit icon available at the corner of the software list headers. This opens the available columns that can be displayed in the list view. All those that are visible currently, will have the check box beside them selected.

5. To remove a column, remove the selection from the respective check box beside the column name.
6. To add a column to the list view, select the unchecked select box beside the column name.
7. To change the column order, click the up and down arrow after selecting the column that you wish to move.
8. Click **Save**.

This will add only those columns which you have chosen in the list view. You can also sort the list view based on columns. To sort software by column, click the column header. Clicking it once will sort it in ascending order. Clicking twice will sort the column in descending order.

> **Note:** The column sort will be possible only with Software Name and Type column.

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.

You can also do a column-wise search of the workstation. To perform a column-wise search

1. Click the search icon at the end of the workstation list view headers. This opens the search field just below every column that is visible in the list view.

2. Enter the search key in field under the column of your choice.

3. Click **Go**. The search results matching the search string(s) are displayed.

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.
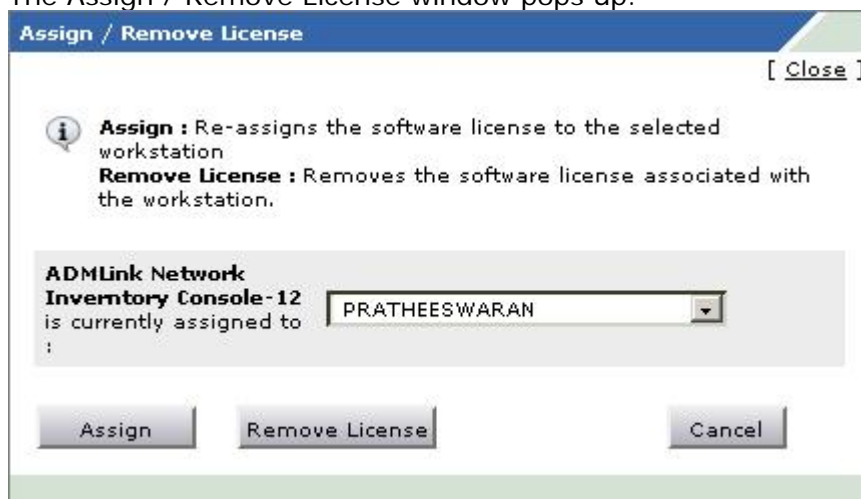
2. To reassign, select a different workstation from the combo box and click **Assign**.

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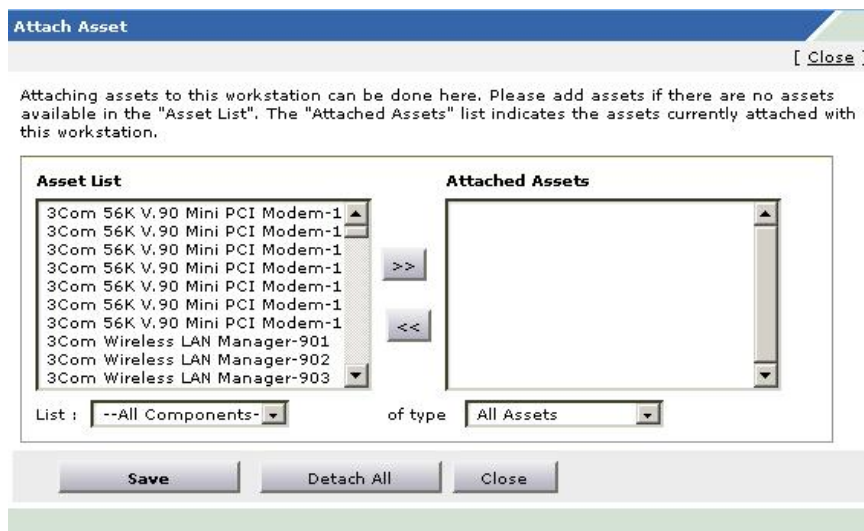
3. From the **Asset List** select the software that you wish to attach to the workstation and click >> button to move it to the **Attached Assets** list. If you want to attach any other software asset, then select those also and move it under **Attached Assets**.

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.

To send email to users who have installed the software, **AdRem NetCrunch 3.0 Premium**

To

Subject | Notifying the users of the software : AdRem NetCrunch 3.0 Premium

Description | Notifying the users of the software : AdRem NetCrunch 3.0 Premium

Send E-mail

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.

Customizing Software List View

ManageEngine ServiceDesk Plus allows you to customize the software list view to include columns of your choice.

To customize the list view

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 **Scanned Software** link from the **View** block on the left menu.
4. Click the column edit icon available at the corner of the software list headers. This opens the available columns that can be displayed in the list view. All those that are visible currently, will have the check box beside them selected.

Columns
☑ select box
☑ Workstation
☑ Model
☑ Domain
☑ OS
☑ Assigned To
☑ Service Tag
☑ Assign
Save Cancel

5. To remove a column, remove the selection from the respective check box beside the column name.
6. To add a column to the list view, select the unchecked select box beside the column name.
7. To change the column order, click the up and down arrow after selecting the column that you wish to move.
8. Click **Save**.

This will add only those columns which you have chosen in the list view. You can also sort the list view based on columns. To sort software by column, click the column header. Clicking it once will sort it in ascending order. Clicking twice will sort the column in descending order.

> **Note:** The column sort will be possible only with Software Name and Type column.

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.

You can also do a column-wise search of the software. To perform a column-wise search

1. Click the search icon at the end of the software list view headers. This opens the search field just below every column that is visible in the list view.

2. Enter the search key in field under the column of your choice.

3. Click **Go**. The search results matching the search string(s) are displayed.

> **Note:** The column-wise search can be done only for the Software Name column.

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).

Enter the product details here.

*Mandatory Field

* **Product Name**

* **Product Type**   -- Choose Product Type --

Price ($)

Save   Close

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. You can also indicate if the asset has been leased or not by selecting the check box **Is Leased**. If the lease start and end date are available then the same should be entered in the **Lease Start** and **Lease End** fields by choosing the date from the calender icon.

10. 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.

Please enter the details of the vendor

* Mandatory Field

Vendor Details

* **Name**

Description

Contact Person

Save   Close

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

12. Click **Save**. The added vendor is selected and is displayed in the combo box.

13. Enter the relevant information for the **Additional Asset details** section if it is available.

14. 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.

15. The **Owner Name** combo box is filled with the relevant groups of values from which you can choose.

16. 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.
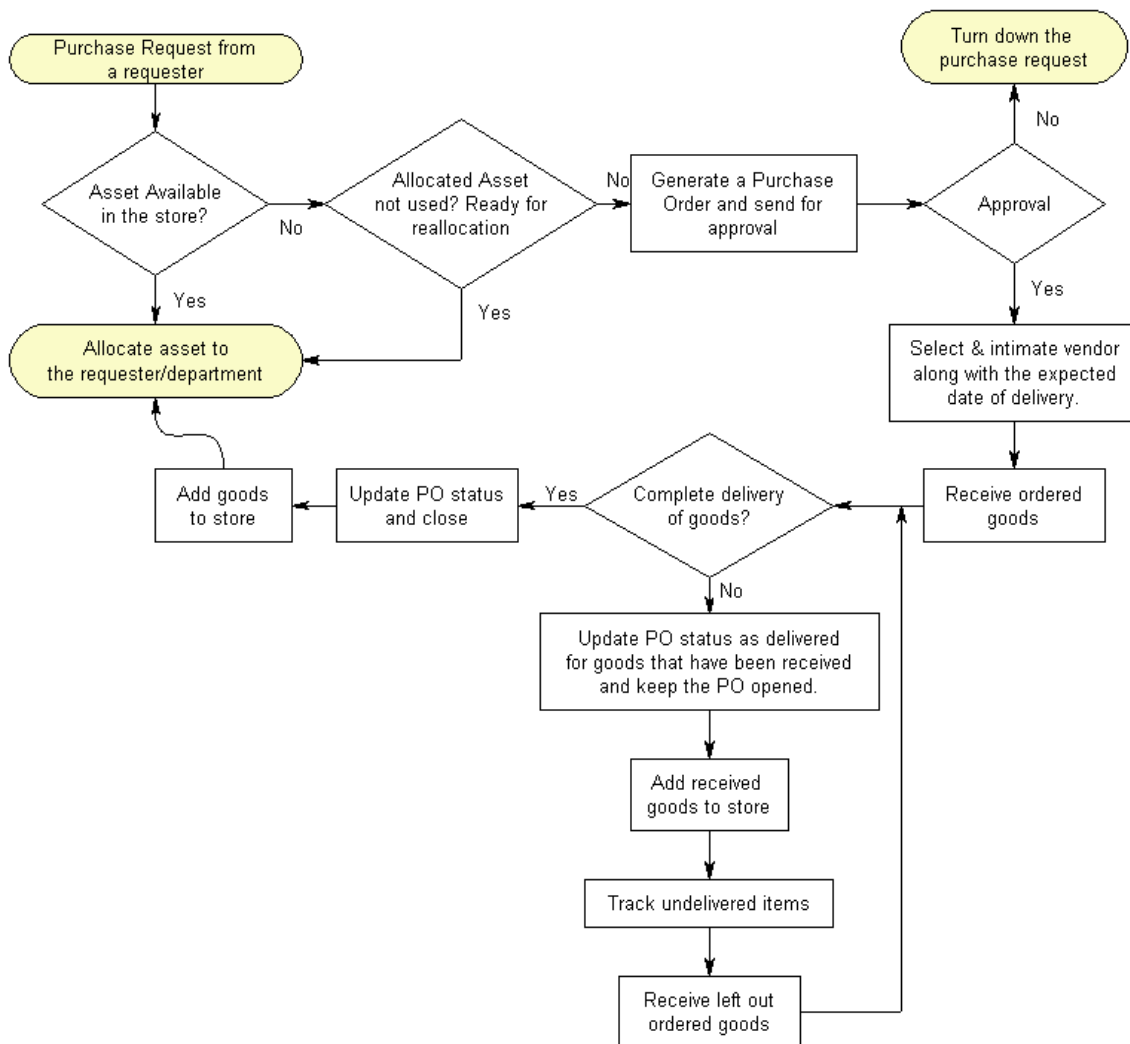
To reach the purchase module, log in to the ServiceDesk Plus application using your user name and password and click the **Purchase** tab in the header pane. You can combine more than one purchase request and create one PO for all these requests.
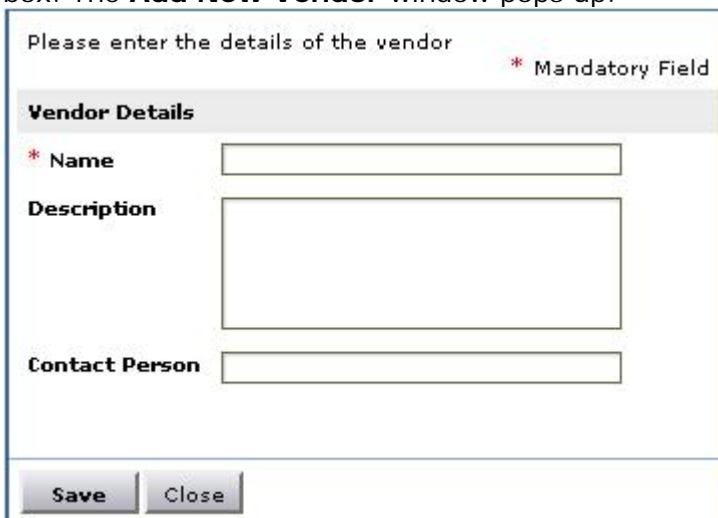
Creating a New Purchase Order

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 **PO #** field and the **Vendor** name are mandatory fields.

2. Enter the **PO #** and **PO Name** in the field provided for the same. The last entered PO number will be displayed just below the **PO #** field. This will help you verify the last entered PO number.

3. 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 🗓.

4. 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.

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

6. Click **Save**. The added vendor is selected and is displayed in the combo box.

7. Enter the name of the person who will be responsible for the PO submission and receipt of items in the **Signing Authority** field.

8. Enter the description for the PO or any other information that you wish to add in the **Remarks** field.

9. If there are any specific terms associated with the PO, enter the same in the **Terms** field.

10. 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. Below the remarks you will have the terms of the PO and the Signatory Authority displayed.

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**.

By default, all POs created will be grouped under POs Pending Approval filter. These POs need to go through the approval process to either be moved into **Approved POs**, which will then await delivery of goods ordered or be moved into **Rejected POs**.

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 **POs Pending Approval**, 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 **PO #** 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, logo, 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, the date by which the PO needs to be delivered, and the PO status. If the PO is not in Pending Approval status, then the status value will be hyper-linked. Clicking the link will open the comments dialog displaying the comment that was entered while approving or rejecting the PO.

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, along with the terms of the PO and the signing authority.

In case of closed POs in the view PO details page, you can also view the associated assets to the PO. All the items that have been received from the PO will be added as assets automatically and the assets that are created from a particular PO will be associate to that PO. Clicking the **Associated Assets** link under the tasks block will display all the assets that were created from the PO.

Editing a Purchase Order

To edit 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 **POs Pending Approval**, 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 **PO #** of the PO that you wish to edit.

4. Click **Edit Purchase Order** link on the right side tasks block. The edit PO form is similar to the create new PO form with four stages where you can edit the PO details. Edit the entries in every stage and proceed as elaborated in Creating a New Purchase Order section.

While editing a PO, you can also edit the quantity specified against each of the items ordered, by clicking the edit icon beside the quantity value.

PO Approval Process

All purchase orders that are created are grouped under **POs Pending Approval**, by default. You need to approve the PO first before you can send the same to the vendor, receive items, and other such actions on the PO items. The PO approval process is initiated with a request for approval sent to the concerned authority and depending on the decision taken by the personnel to approve or reject the PO, the other operations can be performed on the PO.

Submit PO for Approval

To submit PO for approval

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 **POs Pending Approval**, by default.

3. From the list of POs, click the **PO #** of the PO that you wish to submit for approval.

4. Click **Submit for Approval** link from the tasks block. The Submit for Approval dialog pops up.

5. Select the check box **Send mail notification**, available just below the PO # that is displayed. The **To** and **Subject** fields will drop down.

6. Enter the To mail ID. If needed you can modify the subject content manually, else you can change the same from the Notification Rules email template.

7. Type in the message text for the mail notification in the **Description** field.

8. Click **Save**.

The mail notification is sent to the person who was addressed in the To field of the notification. The mail contains the link to the specific PO which needs approval. On clicking the link, it leads you to the login screen, where on providing the proper credentials, the PO awaiting approval opens.

Approve / Reject PO

Once a PO is submitted for approval, a mail notification is sent to the concerned authority requesting the approval for the PO along with the link to the PO.

1. Click the link to open the PO.

2. Log in to ServiceDesk Plus application using your user name and password or the administrator user name and password. The PO is displayed.

3. You can choose to make changes in the PO if you wish to. Refer to Editing a PO section for more details. Or else, click **Approve this PO** link from the tasks block. The Approve this PO dialog pops up where you can enter your comments in the **Description** field and click Save. If you wish to send a mail notification, then select the check box **Send mail notification**, available just below the PO # that is displayed and enter the To address in the field provided.

4. If you wish to reject the PO, then click Reject this PO link from the tasks block. The Reject this PO dialog pops up where you can enter your comments in the **Description** field and click Save. If you wish to send a mail notification, then select the check box **Send mail notification**, available just below the PO # that is displayed and enter the To address in the field provided.

The POs that have been approved will be grouped under the Approved POs state while all the POs that have been rejected will be moved to Rejected POs status. From the Rejected POs state, you can either delete the PO completely from the system or reopen it for approval once again. You can also edit the POs that are in the rejected status.

Receiving PO Items

For the approved POs, you can start receiving the ordered items. ServiceDesk Plus allows you to have a partial receipt of items and wait for the remaining PO items to be delivered at a later time. On receiving a part of the PO items, you can receive them update the approved PO to capture this information. To partially or completely receive items

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 approved POs displayed, click the **PO #** for which the items have been delivered.

4. On the right side, under the tasks block, click **Receive Items**. The Receive Items dialog pops up.

5. Select the check box beside the items column for the items that have been received. If only part of the ordered items have been delivered, then click the edit icon beside the **Quantity** value against each of the items received and enter the quantity that has been received.

6. Click **Receive Items** button.

This updates the PO with the **Received Quantity** value in the **Items** block and moves the PO under **Partially Received POs**. When a future shipment arrives, you can follow the above process to update the quantity of items that have been delivered. Also, in the Receive Items dialog pop-up window, the quantity of items displayed will be the difference between the actual quantity ordered and the already received quantity. Once all the items have been received, the PO moves to the closed status.

All the items that have been received from the PO will be added as assets automatically and the assets that are created from a particular PO will be associate to that PO. Clicking the **Associated Assets** link under the tasks block will display all the assets that were created from the PO.

Printing a Purchase Order

To print a purchase order

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 **POs Pending Approval**, by default. If you want to print the POs from a different status, then select the status from the **Filter Showing** drop down list.

3. Click the PO # of the purchase order which you wish to print.

4. Click **Print Preview** link in the tasks block on the right. The PO is opened in a separate borwser.

5. Click **Print** from the browser menu.

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 **POs Pending Approval**, 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.

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.

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.

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.

You can access the solutions even without logging in to the application, but will be able to view only those solutions that are published in the Self Service Portal. To access the knowledge base directly without having to login to the application, type the URL provided below in the address bar of the browser:

http://<server name>:<port number>/sd/SolutionsHome.sd

where, the <server name> is the name of the server where ServiceDesk Plus is installed and <port number> is the port where the application is running.

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 the **New Solution** button in the Solutions home page that is displayed on clicking the **Solutions** tab in the header pane. This opens the **New Solution** form. The title, contents, and topic fields are mandatory fields.

3. Enter a title for the solution you wish to add in the given text field. 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. If this solution requires any additional files to support the article, then you can attach the same.

5. While entering the solution in the contents field, you also have an option insert image to the contents. To insert images,

    1) Click Insert/Modify image icon from the tool bar. This opens Insert Image page.
    2) Click on the Browse button to search and select the image to be inserted.
    3) Once the image is selected the image gets listed in the Image Preview of the page with the image size details.
    4) Click the **Insert Image** button to insert the image to the contents.

6. Click **Attach a File** button. The **Add / Remove Attachment** window pops up.

7. Click **Browse**.

8. Select the file(s) that you wish to attach to the article and click **Open**.

9. Click **Attach**. The files can be added one-by-one only.

10. Once you finish adding all the files, click **Done**. The files attached will be listed in the **Newly attached files** field.

11. 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.

12. 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.

13. To publish the solution in the self-service portal also, select the check box **Publish this solution in Self-Service Portal also**.

14. Click **Add**. If you do not wish to add the solution then click **Cancel**.

Editing a Solution

To edit a specific solution

1. Login to ServiceDesk Plus with your user name and password.

2. Click the **Solutions** tab in the header pane. The solutions home 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.

3. 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.

4. 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.

5. 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. You can also add more attachments or delete existing ones.

6. 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 the same.

Deleting a Solution

To delete a specific solution

1. Login to ServiceDesk Plus with your user name and password.

2. Click the **Solutions** tab in the header pane. The solutions home 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.

3. 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.

4. Click the **Delete** link available beside the solution title name. A confirmation dialog opens.

5. 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 to ServiceDesk Plus application using your user name and password.

2. Click the **Solutions** tab in the header pane.

3. The **Solutions** home 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 **Browsing - All Topics** 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** button available in the **Solutions** home page just above the **Browsing** 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,
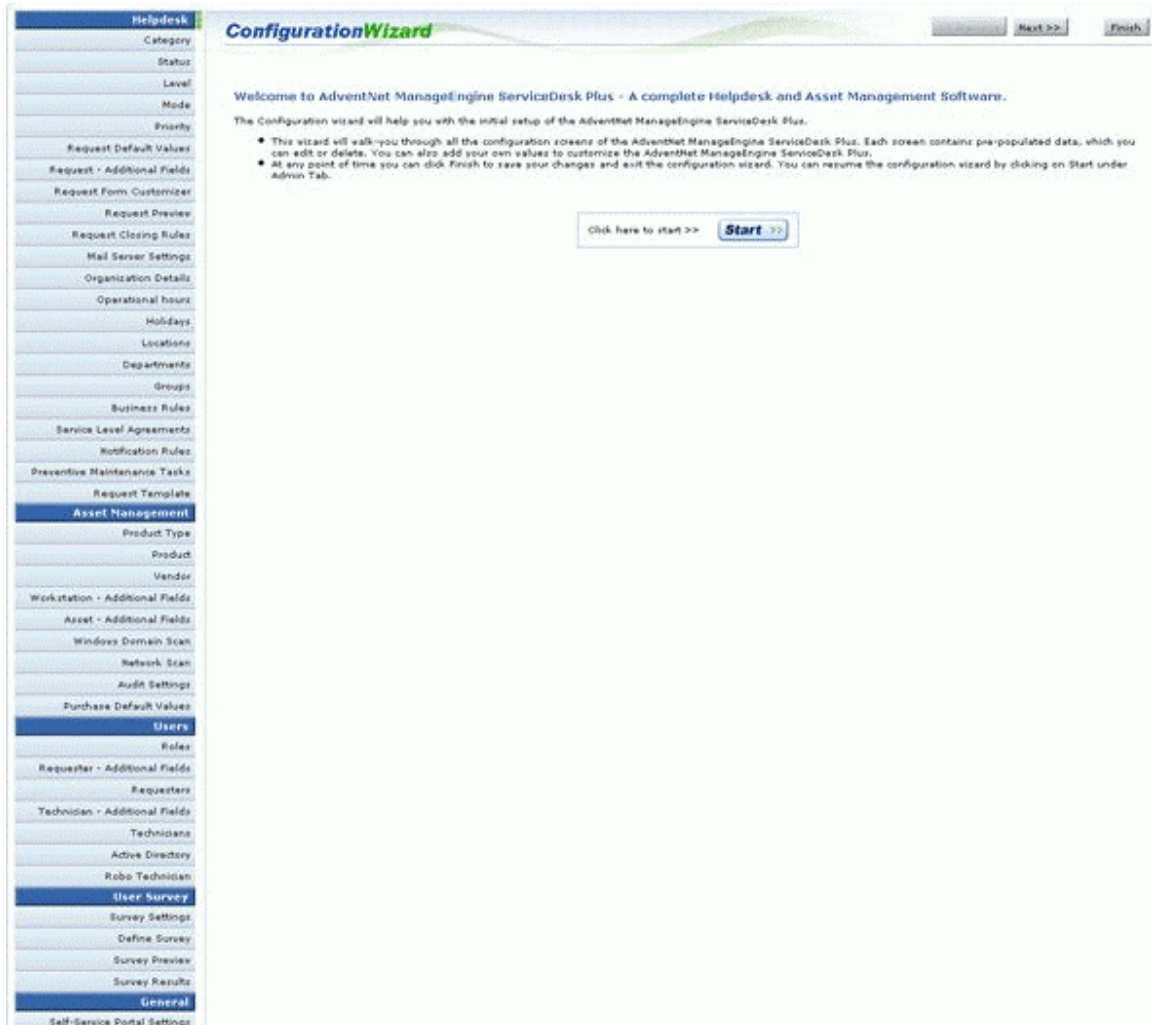
To proceed with the configurations, follow the instructions provided in the configuration wizard. There are some default values given for various configurations. If you do not require these values, you can delete them and add your own values to suit your needs either in the wizard itself or at a later 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.

Help Desk Configurations

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 Status
3. Request level
4. Request mode
5. Request priority
6. The default request settings/values for the request form
7. Configuring Additional Fields that need to appear in the new request form, so as to collect information very specific to your organization
8. Request Form Customizer
9. Request Preview
10. Request Closing Rules

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. Configuring Queues
9. Configuring Business Rules
10. 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, Sub-categories** and **Items**.

***For example*:** A request to install **Adobe Photoshop** can be put under the request **Category** as **Software, Sub-Category** as **Adobe Photoshop** and **Item** to be **Versions 5.0,6.0** and so on. Similarly, if there is a problem in the **functioning of the mouse,** then it can categorized under the **Category** as **Hardware, Sub-Category** to be **mouse** and **Item** to be **scroll button not working**.

Depending on the need, you can create various such categories, sub-categories and item using this option. These categories,sub-categories and items will be listed in the drop-down menu in the **New Request** form.

To configure category,

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 **HelpDesk Customizer** icon . This opens the HelpDesk-Category page where you can categorize the request in to category, sub-category and item. You have the list of request form attributes that can be customized such as status,level,mode and so on is listed on the left side of the page.

Create New Category,

4. Click **New Category** button. This displays the category form.

5. Specify the **Category Name** in the given text field. For ex. Software. This is the only mandatory field.

6. Specify relevant information about the newly created category in the **Description** field.

7. Select the technician to be assigned for the newly created category from the **Assign To Technician** combo box. All the issues related to this category will be assigned to the selected technician.

8. Click **Save** button to save the details. You can see the category getting listed in the category list view below the form.

9. Click **Save And Sub Category** button to save the details and add sub category to the category.

Create New Sub-Category,

10. Click **New Sub Category** button in the category list page to add sub-category to the category. Or click add sub-category icon beside the category title in the list view . This displays the sub-category form.

11. Specify the **Sub Category** name in the given text field. For ex. AdobePhotoshop. This is a mandatory field.

12. Specify relevant information about the newly created sub category in the **Description** field.

13. Select the **Category** from the combo box. For ex. Software. This is a mandatory field.

14. Click **Save** button to save the values. You can see the sub-category getting listed under the selected category.

Create New Item,

15. Click **New Item** button in the category list page to add item to the sub-category. Or click add new item icon ↳ beside the sub-category title in the list view. This opens the New Item form in which the you have category, sub-category and other details on top of the page.

16. Specify the **Item name** in the given text field. For ex. versions. This is a mandatory field.

17. Specify relevant information about the newly created item in the **Description** field.

18. Select the **Sub Category** for the item from the combo box. For ex. software. This is a mandatory field.

19. Click **Save** button to save the details.

Editing & Deleting Category

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 **HelpDesk Customizer** icon . This opens the Configuration Wizard page.

4. Click the **HelpDesk Customizer** block at the left side of the page under the HelpDesk block. This opens the HelpDesk- Category page.

Editing Category

1. Click the **edit** icon beside the category name in the **Category List** page. This opens the edit category form.

2. edit the details and save the changes.

Editing Sub-Category

1. Click the title of the category in the category list page. This opens the sub-category details page.

2. Click the edit icon . This opens the edit sub-category form.

3. Edit the details and save the changes.

Editing Item

1. Click the title of the sub-category to open the item details page.

2. Click the edit icon . This opens the edit item form.

3. Edit the details and save the changes.

Delete Category

1. From the **Category List** page, select the categories to be deleted by enabling the check box.

2. Click delete icon beside the category name in the category list page. A pop window pops up to get your confirmation on the delete operation.

3. Click **OK** to proceed. You can see the category deleted from the list.

Delete Sub-Category

1. Click the corresponding sub-category from the list. You can view the list of sub-categories for the category.

2. Select the sub-category from the list by enabling the check box.

3. Click **Delete** button to delete the selected sub-category. A pop window pops up to get your confirmation on the delete operation.

4. Click **OK** to proceed. You can see the sub-category deleted from the list.

Delete Item

1. Click the corresponding item from the list. You can view the list of items for the category.

2. Select the item from the list by enabling the check box.

3. Click **Delete** button to delete the selected item. A pop window pops up to get your confirmation on the delete operation.

4. Click **OK** to proceed. You can see the item deleted from the list.

Configuring Status

The requests that are received in ServiceDesk Plus will be taken up by the technicians and will be in various stages of completions. For ease of managing the requests and to know the status in which each of the received requests are in, ServiceDesk Plus allows you to create various request status under which you can group requests. These status can either be **In Progress** or **Closed**. While creating a status, you can also choose to stop the request timer for the status that is being created. Depending on the need of your organization, you can create various such status, which will be listed in the status drop-down menu in the **New Request** form.

To open the status 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.

4. Click **Status** from the left menu, or click the **Next** button on the top of the category list page. The **Status List** page is displayed. You can add, edit, or delete the request status.

Add Status

To add a request status

1. Click the **Add New Status** link available at the right top corner of the **Status list** page.

2. In the **Add Status** form, enter the name of the status in the **Name** field.

3. Select the **Type** to which the status belongs. The status type allows you to identify the whether the status that you are adding is still in progress and hence should be a part of the open requests or should be moved to the closed requests. If the added status requires the timer of the request to be stopped, then you need to set the check box **Stop timer**.

4. If you wish, you can enter the status **Description**. Please note that you cannot create two status with the same **Status Name**.

5. Click **Save**. The new status is added.

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

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

Edit Status

To edit an existing status

1. In the **Status List** page, click the **edit** icon beside the status name that you wish to edit.

2. In the **Edit Status** form, you can modify the name of the status.

3. If the status belongs to the In Progress type, then you can choose to stop or start timer. If the request status belongs to the completed type then you cannot edit the type of the request status.

4. If you wish you can edit the **Description** of the status.

5. 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 status, if you wish to add a new status, then click **Save and add new** button instead of clicking **Save** button after making the changes.

Delete Status

1. In the **Status List** page, click the **delete** icon beside the status 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 status, 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. 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 ![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 ![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**.
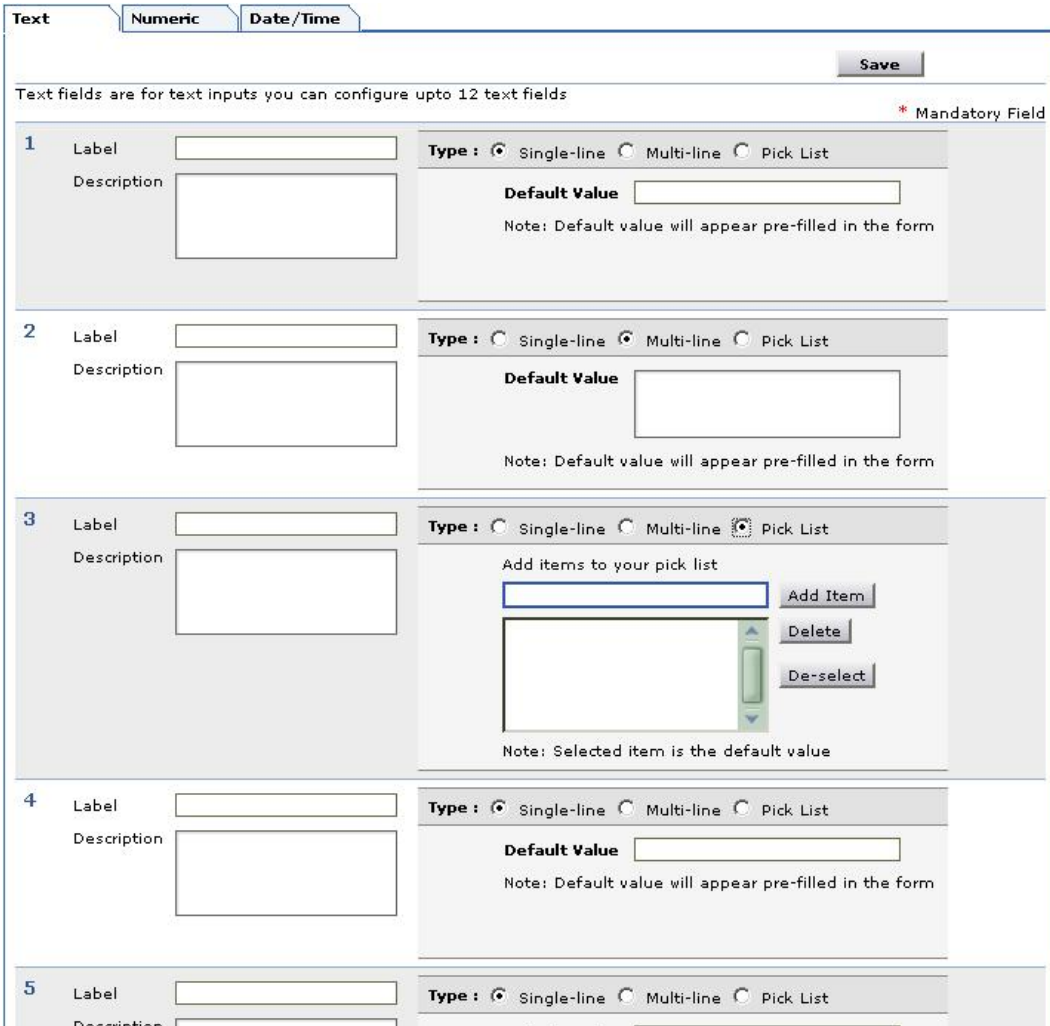
Configuring Request Settings

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 Default Values** from the left menu. The **Request Default Values** page is displayed. You can set the default values for the request category, level, mode, priority and Group.

5. From the **Default Category** combo box select the default category 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 level, mode, priority and group.

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. You can choose the type of text field that you wish to add by selecting the radio buttons. A Single-line text field allows you to add just a text field. The Multi-line text field allows you to add a text box where a lengthy description can be added. A Pick List allows you to add a list menu from which you can select. In all the three cases, you can add default values for the text field in the space provided for the same.

7. To add items for the pick list, enter the value in the text filed and click **Add Item**. The value will get added to the list below. To select the default selected value of the list, click on the value in the list.

8. To add numeric fields, click the **Numeric** tab and then enter the label name in the form fields provided.

9. To add Date/Time fields, click the **Date/Time** tab and enter the required details.

10. 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 the default entries made for them, 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 Request Form Customizer

The **Request Form Customizer** helps you to create a tailor-made Request Form to ensure that the users submit all the required information along with the request. The Help Desk technician can design a customized Request Form of his own that suits his needs.

To customize the request form,

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 **HelpDesk Customizer** icon . This opens the Configuration Wizard page.

4. Click the **Request Form Customizer** block at the left side of the page under the HelpDesk block. This opens Request Form Customizer page.

The request form can have,

- Certain important fields as **Mandatory :** All the must-have information that the technicians will require to resolve the request is defined as Mandatory.

- Certain fields the **Requester can Set**: Any optional information to be provided by the requester is selected as requester can set field.

- Certain fields that the **Requesters can View:** The fields that can be only viewed and cannot be edited or set by the requesters is selected as requesters can view field.

  Example: When you customize the request form, you can define

- Title & Name of the request can be selected as **Mandatory** field.
- Contact Number of the requester can be selected as **Requester can Set** option.
- Mode can be selected as **Requesters can View** option. Say if the Help Desk manager wants the request to be sent only through email and not through any other mode then the technician can select mode to be as **Requesters can View** option.

There are four blocks of information to be provided in the request form, the Help Desk manager can customize the fields based on his needs and priority. The first block is the Request Details.

1. In the request details block Status, Level, Mode & priority are the available fields.

2. Select the corresponding values from the combo box.

3. Select the options to customize the form by enabling the relevant check box.

The Second block is the Owner Details block,

1. In this block Group & Technician are the available fields,

2. Select the corresponding values from the combo box.

3. Select the options to customize the form by enabling the relevant check box.

The Third block is the Requester Details block,

1. In this block Name,Contact Number,Department & Workstation ID are the available fields,

2. Select the name from the requester list by clicking the requester list icon. This is a mandatory field. On selecting the name, contact number & department fields gets filled automatically.

3. Select the Workstation ID from the combo box.

4. Select the options to customize the form by enabling the relevant check box.

The fourth block is the Category Details block,

1. In this block, Category, Sub-Category, Items, Subject & Description are the available fields,

2. Select the corresponding values for the fields from the combo box.

3. Specify the title for the form in the **Subject** field. This is a mandatory field.

4. Select the options to customize the form by enabling the relevant check box.

Click **Save**, to save the settings.

Click **Save and Preview**, to save and see the preview of **New Request** form for Requester login.

Configuring Request Preview

On customizing the request form for both the requesters as well as technicians, you can see the preview for both the logins using this option.

To see the request preview,

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 **HelpDesk Customizer** icon . This opens the Configuration Wizard page.

4. Click the **Request Preview** link at the left side of the page under the HelpDesk block. This opens Request Preview page.

5. There will be two tabs available one for **Requester View** and other for **Technician View.** Click on the requester view tab to view the new request form for requester login.

6. Click on the technician view tab to view the new request form for technician login.

Configuring Request Closing Rules

Request closing rules can be used to select the mandatory fields to be filled in by the technicians while closing the requests.

To preset the request closing rules,

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 **HelpDesk Customizer** icon . This opens the Configuration Wizard page.

4. Click the **Request Closing Rules** link at the left side of the page under the HelpDesk block. This opens Request Closing Rules page.

5. Select the mandatory fields from the list for closing the request by enabling the check box.

6. Save the details.

Example: If you have selected **Resolution** as a mandatory field, then while closing a request the technician fixing the problem, should enter the reason and solution for the problem in the resolution text field, else an error message is shown asking you to enter the details in the resolution field.

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 as above.

2. Enter the outgoing mail server name / IP address, 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. The Port associated to SMTP is 25 by default.

6. If your SMTP server for outgoing mails require authentication, then select the check box **Requires Authentication**.

7. Enter the **User Name** and **Password** in the respective fields.

8. 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. You can import the company logo and use that in places where the organization details are being used.

    1. Click **Import Image** button beside the Company **Logo field**.

    2. Click the **Browse** button and choose the image file from the file chooser window and click **Open**.

    3. Click **Import**.

10. By default, the **Use this image** check box is enabled. If you do not wish to use this image, then disable the check box.

11. 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.

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. This opens the SLA list page. You can add, edit, or delete SLAs.

4. By default the all SLA based mail escalations will be enabled. If you wish you can **Disable Escalations.**

5. You have set four SLA's High, Medium, Normal,Low SLA's by default. You can also add more SLA's to the list.

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 is a mandatory field hence 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 choose the technicians to whom the SLA violation should be escalated.

10. Select any one of the radio buttons to enter the date and time of the escalation.

11. You can choose to escalate **before the violation or after the violation.** If you wish to escalate the SLA violation ahead to the technician then click **Escalate Before** option . Specify the number of days before the SLA violation is about to happen in the text box. This is to escalate to the technician about the onset of the violation. Also specify the time of escalation.

12. Click **Escalate After** option to escalate after the violation. Specify the number of days after the SLA violation has occurred to escalate in the text box. Also specify the time of escalation.

13. Click the **Save** button to save the SLA and return to the list view. you can set 4 levels of escalations.

14. Click the **Save and add new** button to save the SLA and add another SLA.

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.

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. Click **Save** to save the changes . 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**.

Organizing the SLAs decide the order in which the SLA is applied on the incoming request.

Configuring Queues

Request Groupss denote the location where the various incoming requests can be categorized and grouped. Each Group can have a group of technicians incharge of handling the requests pertaining to that Group You can configure these Groups in such a way that notifications can be sent to technician group who belong to the Group regarding a new request creation. These Groups will be listed in the drop-down menu in the **New Request** form.

To open the Group 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 **Groups** icon . You can add, edit, or delete Groups.

Add Group

To add a request Group

1. Click the **Add New Group** link available at the right top corner of the **Group list** page.

2. In the **Add Group** form, enter the group name in the **Name** field.

3. Select the technicians that you wish to group under this Group from the **Available Technicians** list box and click >> button to move them to **Technicians interested in this Group**.

4. You can choose the technicians of the Group to whom you wish to notify for a new request creation in the Group. To do this select the check box **Send notification to Group technician(s) when a new request is added to this Group**. This drops down the technician selection field.

5. Click **Choose** button to open the **List of Group Technician** pop-up window.

6. Select the technicians whom to wish to notify and click **OK**.

7. To choose the technicians to send notification for unpicked requests in the Group, select the check box **Send notification to technician(s) when a request in this Group is left unpicked**. This drops down the technician selection field and time period configuration after which the notification will be sent.

8. Click **Choose** button to open the complete list of technicians available in your help desk.

9. Select the technicians from the list box and click **OK**. The technicians get listed in the field provided.

10. Enter the time period, from the creation of the request in Group, after which the notification of unpicked requests will be sent to the selected technicians.

11. If you wish to describe the Group in detail enter the same in the **Description** text box.

12. Click **Save**. The new Group is added.

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

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

> **Note:** Enabling the check boxes while adding Group does not ensure that the notification will be sent. This setting is just to choose the technicians to whom the notification needs to be sent and the time frame after which the unpicked request notification is to be sent. To actually send the notification, you need to enable the corresponding setting under the **Notification Rules** under the Admin tasks, which are:
>
> 1. Notify Group technician by mail when request is added to Group.
>
> 2. Notify technician by mail when request is unpicked in Group.

Edit Group

To edit an existing Group

1. In the **Group List** page, click the **edit** icon beside the Group name that you wish to edit.

2. In the **Edit Group** form, you can modify the name of the Group, the technicians belonging to the Groups, the notification settings, and 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 Group, if you wish to add a new Group, then click **Save and add new** button instead of clicking **Save** button after making the changes.

Delete Group

1. In the **Group List** page, click the delete icon beside the Group 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 Group, then click **Cancel**.

Configuring Business Rules

You can define Business rules that will enable you to organize the incoming requests (form and e-mail) and perform any action ranging from delivering them to group, to assigning status and other parameters of the requests. To add a new Business Rule, click **Add New Business Rule** link on the right hand side corner of the **Business Rule List** table.

To open the Business Rule 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 **Business Rule** icon . The resulting page will display the available list of business rules. You can add, edit, or delete business rules.

Add New Business Rule

To add a Business Rule

1. Click **Add New Business Rule** link available at the top right corner of the **Business Rules List** page.

2. In the **Add Business Rule** form, enter the **Rule Name**. This field cannot be empty.

3. If required, you can provide a corresponding **description** for the business rule.

4. In the Business Rules block define the rules and criteria that need to be satisfied by the incoming request. Set the criteria by selecting from the **Select Criteria**

combo box, and then choose conditions, and then the individual values that need to be matched by clicking 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 select the condition **is** or **is not** from the drop down list. This list varies from each criteria. Then, 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 box just before the choose button.

5. Click **Add to Rules** to add the defined rule to the rules table.

6. 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**. After defining the rules, you need to define the actions that need to be performed on the request matching the criteria.

7. Choose the action that needs to be performed on the request from the **Choose Action** drop down list.

8. Click **Choose** button to the select the values for the chosen action. For example, if the action you had chosen was to **Place in Group**, then clicking the choose button will display the available groups in which the request can be placed. You need to select the group in which the request has to be placed and click **OK**.

9. Click **Add**.

10. Click **Save**.

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

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

Edit Business Rule

To edit an existing business rule

1. In the **Business Rules List** page, click the edit icon beside the **Business Rule Name** that you wish to edit.

2. In the **Edit Business Rule** form, you can modify all the fields mentioned in the add business rule form.

3. To edit the **Match the below criteria** set, click the **edit** icon beside the individual criteria. 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 criteria completely. To delete a criteria, click the delete icon beside the individual criteria.

5. In the actions to be performed, you can add or delete actions that need to be performed on the request that matches the criteria defined.

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 a business rule, if you wish to add another new business rule, then click **Save and add new** button instead of clicking **Save** button after making the changes.

Delete Business Rule

1. In the **Business Rule List** page, click the delete icon beside the **Business Rule 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 business rule, then click **Cancel**.

Organize Business Rules

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

1. Click **Organize Business Rules** link available above the list of business rules in the **Business Rules List** view. A pop-up window is opened with the list of available business rules in the order that is appearing the list view.

2. Select a business rule, and click **Move up** or **Move Down** button beside the list.

3. Click **Save**.

Organizing the business rules decide the order in which the rule is applied on the incoming request.

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** 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**.

You can customize the message template for each of the notifications. For this

1. Click **Customize Template** link available beside the notification for which you wish to modify the content that is being sent. The resulting page is as below:

2. You can change the subject and the message content by typing the text of your choice and also adding other variables that you wish to display as a part of the subject or message content. To add more variables, just click the corresponding variable from the list box beside the respective field.

To customize the message template for purchase and contract notifications

1. Click the **Email Template** link beside module (Purchase Order and Contracts) for which you want to customize. The **Message Template** form is displayed in editable mode.

2. The **Notification Type** field is non-editable. You can edit the **description** of given for the notification type.

3. In the **Message** 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**.

Preventive Maintenance

You can create a Preventive Maintenance Task for regular maintenance such as changing the printer toner every month or perform a regular service shutdown.

To schedule a preventive maintenance task,

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 **Preventive Maintenance Tasks** icon . This opens the Configuration Wizard page.

4. Click the **Preventive Maintenance Tasks** link at the left side of the page under the HelpDesk block. This opens Request Maintenance Tasks page.

5. Click **Add New PM Task** link. This opens Add Preventive Maintenance Task page. You can create a preventive maintenance task in two steps.

Creating a Task Template

Task template has four blocks, Request details, Owner details, Requester details, Category details.

1. Specify the **Status** of the request from the comb box. Ex. Open.

2. Specify the **Level** of the request from the combo box. The level should be selected based on the priority. Ex. If the priority of the request is high then select Tier 1.

3. Select the **Mode** from the combo box. This will be the mode of communication, to inform the technician.

4. Select the **Priority** from the combo box. For ex. High, Medium, Low etc.

5. Select the **Group** from the combo box. This option is given to group the task template. Ex. Network, Hardware etc.

6. Select the **Technician** from the combo box to assign the task and click the requester list icon to select the requester **Name.** This is a mandatory field. The other details such as **Contact Number, Workstation ID and Department** get filled automatically based on the requester details specified in the requester form.

7. Select the **Category, Sub Category and Item** from the combo box.

8. Specify the **Subject** line for the task in the given text field. Specify relevant information about the task in the given **Description** field.

9. To attach a file to the task template click **Attach a File** button to attach files.

10. You can add **Resolution** in the resolution text field.

11. Click **Next>>** button for Task Scheduling.

Task Scheduling

To schedule a task, select the time frame from the listed options:

Daily Schedule: To run a daily maintenance task, click **Daily Schedule** radio button.

1. Select the **Time** at which the maintenance task should be scheduled from the combo box.

2. Select the **Date** on when the maintenance task should be scheduled from the **Calendar** button.

3. Save the details.

Weekly Schedule: To run a weekly maintenance task, click **Weekly Schedule** radio button.

1. Select the day of the week by enabling the corresponding check box beside the day of the week.

2. Else if you wish to schedule on all days of the week, then click **Everyday** check box.

3. Select the **Time** frame to schedule the task from the combo box.

4. Save the details.

Monthly Schedule: To run a monthly maintenance task, click **Monthly Schedule** radio button.

1. Select the month to run the task by enabling the check box beside **Every Month**.

2. Select the **Date** on when the task should be scheduled from the combo box.

3. Select the **Time** at which the task should be scheduled from the combo box.

4. Save the details

Periodic Schedule: To run a periodic maintenance task, click **Periodic schedule** radio button.

1. Specify the day (s) in the given text field to schedule the maintenance task. i.e after every specified nth day the maintenance task will be executed.

2. Save the details.

One Time Schedule: To run a one time maintenance task, click **One Time Scheduling** radio button.

1. Select the **Date & Time** on when the maintenance task should be executed.

2. Save the details.

For Example:

If you wish to schedule a monthly task to change the printer cartridges,

1. Select **Monthly Schedule** radio button.

2. Select the check box **every month**.

3. Choose the **date** from the combo box. Ex: 3rd of every month.

4. Select the **time** from the combo box. Ex: 1500 hrs.

5. **Save** this schedule. A task to change cartridge will be sent to you every month on 3rd at 1500 hrs helping you to complete the regular maintenance task in advance without any request sent from the users.

Request Template

You can create a Request Template for all the frequently raised requests such as, changing the printer toner or cartridges once exhausted. Thus it helps you to create a default request template for all the repeated requests raised by the requesters.

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 Template** icon. This opens the **Request Template** page.

4. Click on **Create New** button. This opens the request template form.

5. Specify the **Template Name** in the given text field. Ex: Paper Jam. This is a mandatory field.

6. If you wish to show the request template to the requester then select **Show to Requester** button.

7. Specify relevant remarks about the request template in the **Comments** text field.

8. Specify the **Status** of the request from the comb box. Ex. Open.

9. Specify the **Level** of the request from the combo box. The level should be selected based on the priority. For ex. If the priority of the request is high then select Tier 1.

10. Select the **Mode** from the combo box. This will be the mode of communication, to inform the technician.

11. Select the **Priority** from the combo box. For ex. High, Medium, Low etc.

12. Select the **Group** from the combo box. This option is given to group the task template. Ex. Network, Hardware etc.

13. Select the **Technician** from the combo box to assign the task.

14. Select the **Category, Sub Category and Item** from the combo box.

15. Specify the **Subject line** for the task in the given text field. Specify relevant information about the task in the given **Description** field.

16. If you wish you can add the **Resolution** in the resolution text field.

17. **Save** the details. The request template gets listed under the **New Request** tab at the top left corner of the page.

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. You can choose the type of text field that you wish to add by selecting the radio buttons. A Single-line text field allows you to add just a text field. The Multi-line text field allows you to add a text box where a lengthy description can be added. A Pick List allows you to add a list menu from which you can select. In all the

three cases, you can add default values for the text field in the space provided for the same.

6. To add items for the pick list, enter the value in the text filed and click **Add Item**. The value will get added to the list below. To select the default selected value of the list, click on the value in the list.

7. To add numeric fields, click the **Numeric** tab and then enter the label name in the form fields provided for the same.

8. To add date/time fields, click the **Date/Time** tab and enter the required details.

9. 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 the description for the field.

5. You can choose the type of text field that you wish to add by selecting the radio buttons. A Single-line text field allows you to add just a text field. The Multi-line text field allows you to add a text box where a lengthy description can be added. A Pick List allows you to add a list menu from which you can select. In all the

three cases, you can add default values for the text field in the space provided for the same.

6. To add items for the pick list, enter the value in the text filed and click **Add Item**. The value will get added to the list below. To select the default selected value of the list, click on the value in the list.

7. To add numeric fields, click the **Numeric** tab and then enter the required details.

8. To add date/time fields, click the **Date/Time** tab and enter the required details.

9. 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

1. Click the scan domain icon available beside the **Domain Name** that is to be scanned. The scanning wizard displays the various Organizational Units (OUs) available in that domain.

2. Choose the specific OU for which you wish to execute the scan operation by selecting the check box beside it.

3. Click **Start Scanning**. The scanning will start and the progress of the scan will be displayed in the pop-up window. Once the scanning is complete, the details about how many were scanned, how many failed will be listed along with the information on the possible reason for scanning failure.

You can view the scanned workstations in the **Inventory** module. The problems encountered during the scanning of workstations will also 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 periodic scanning of your network, enable regular cleanup of scanned information, and set re-scaning interval for scanning workstation. To configure the audit 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 Asset Management block, click the **Audit Settings** icon. The resulting page displays the various audit options available.

To configure regular scanning, select the **Enable Scheduled Scan** check box. Then set the time frame in which you require the scheduled scan to be performed. Select any of the 5 radio buttons below the **Enable Scheduled Scan** sub-head, explained below:

Scan Once

Select the date on which you want to scan your network using the calender icon and set the time which you wish to scan on the chosen date.

Daily Scan

Select the time (hours and minutes) when you want the scan to be performed on a daily basis from the drop down menu and then select the date from which you want to schedule the daily scan using the calender icon.

Weekly Scan

In the weekly scan option you can also choose to schedule a daily scan. For this you just need to select the checkbox **Everyday**, else, just select the check box beside that day of the week, when you want the scan to be performed. Now set the time (hours and minutes) of scan.

Monthly Scan

In the monthly scan option you can also choose to schedule a weekly scan. For this you need to select the radio button **Day**, and choose the day on which you wish to scan, else, just select the radio button **Date** and choose the date of on which the scan will be executed.

You can also choose the months in which you want to scan. For this you have to select the check box beside the name of the months during which you wish to scan. If you want to scan every month, then select the check box **Every Month**. Finally select the time (hours and minutes) of scan.

Periodic Scan

You can enter a random period of time in which the scan will be repeated. Enter the number in the field provided. The scan will be performed every n^{th} day, where n is the number of days in which the scanning cycle has to repeat.

You can enable regular cleanup of scanned information. Select the check box **Enable Scan History Clean up** and enter the number days in the field provided for deleting the scanned information before the specified number of days.

You can also check for any newly added workstations by performing a re-scan of your network. For this you need to select the check box **Check for newly added workstations** and enter the number of days when the periodic re-scanning of your network will be performed.

Click **Save** to save the settings.

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 Currency** which will be used to display all the cost in the application.

5. Enter the **Default Tax Rate**. It can have decimal values.

6. If you have any **signing authority** and then enter the name of that person in the field provided for the same.

7. If you want to tax the shipping cost also, then select the **Tax Shipping or not** check box.

8. Enter the **Shipping Address** in the text box provided for it.

9. Enter the **Billing Address** in the space provided for it.

10. If you PO has specified terms and conditions that you need attach with the PO, then type in the same in the **Terms** text box.

11. 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. You can also choose to restrict the technician from viewing all the requests received by the application. To do this, select the corresponding radio button which will suit your need from the following:

    o   All: The technician with this role can view all the requests that are received in ServiceDesk Plus.

    o   All in Group & assigned to him: The technician will be able to view all the requests in the Group to which he/she belongs to and also those requests that are assigned to him/her.

    o   Assigned to him: The technician can view those requests that are assigned to him/her only.

5. Enter the **description** for the role you are adding.

6. 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. You can choose the type of text field that you wish to add by selecting the radio buttons. A Single-line text field allows you to add just a text field. The Multi-line

text field allows you to add a text box where a lengthy description can be added. A Pick List allows you to add a list menu from which you can select. In all the three cases, you can add default values for the text field in the space provided for the same.

6. To add items for the pick list, enter the value in the text filed and click **Add Item**. The value will get added to the list below. To select the default selected value of the list, click on the value in the list.

7. To add numeric fields, click the **Numeric** tab and then enter the label name in the form fields provided for the same.

8. To add date/time fields, click the **Date/Time** tab and enter the required details.

9. 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 from which you wish to import is installed. If the other details such as domain controller name, user name, and password have already been entered in the Domain scan page, then that will be populated automatically. Else enter the name of the domain controller in the **Domain Controller Name** field, login name and password in the corresponding fields.

3. **Select the Fields for Import** from the active directory by enabling the check box.

4. Click **Import Now !**. The import wizard displays the various **Organizational Units** (OUs) available in that domain. Choose the specific OU from which you wish to import users by selecting the check box beside it.

5. Click **Start Importing**. 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. You can also change the login name of the requester.

3. Click **Save**. If you do not wish to modify any of the details, click **Cancel**.

Change Requester Password

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. Click **Reset Password**. If you do not wish to change the password, click **Close** instead of **Reset Password**.

Change Requester to Technician

You can change a requester to technician without having to delete the requester information and recreate the same as a technician. To change requester to technician

1. Click the **Change <requester name> as Technician** link available at the top right corner of the edit requester form. The page refreshes to display the edit technician form.

2. Change the roles assigned to the requester from **SDGuest** to any other role that you wish to provide the technician.

3. Enter any other details that you wish to enter including the **Cost per hour** and so on.

4. Click **Save**. If you do not wish to change the requester to technician, click **Cancel** instead of **Save**.

If you want to continue adding technician after converting a requester to technician, then instead of clicking **Save**, click **Save and add new** button. This saves the technician details and reopens the add technician form after displaying a success message for changing the requester to technician.

Associate Workstation to Requester

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 edit requester form. The associate workstation window is opened.
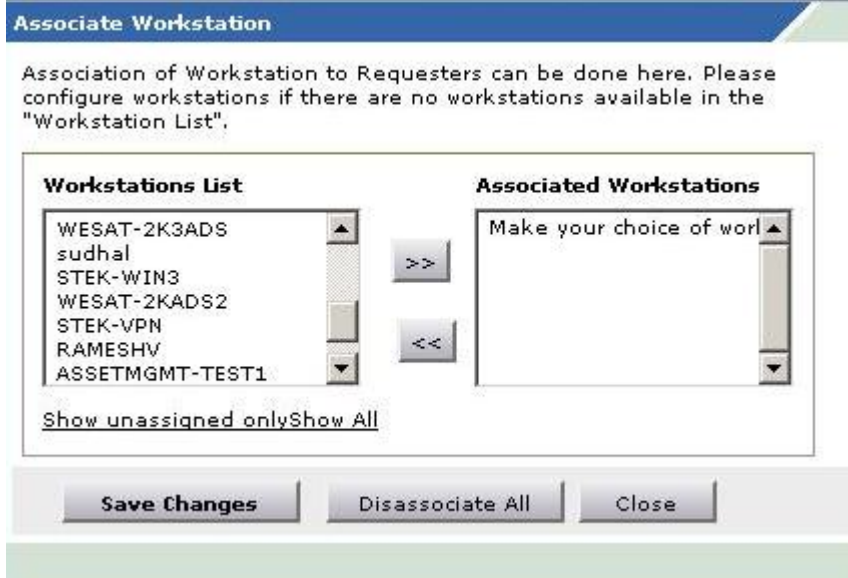
2. In the **Associate Workstation** pop-up, select the workstations that you wish to associate with the requester from the **Workstation List** and move them to the **Associated Workstations** list by clicking the >> button. To dissociate workstations, select the respective workstations in the **Associated 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) or email ID or any other parameter that will identify the requester in the field beside the **Search Requester List**. This lists the requesters whose details 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.

Another option to search requesters will be using the column-wise search option. To perform a column-wise search

1. Click the search icon at the end of the requester list view headers. This opens the search field just below every column that is visible in the list view.

2. Enter the search key in field under the column of your choice.

3. Click **Go**. The search results matching the search string(s) are displayed.

Requester List View Customization

To customize the requester list view

1. Click the column edit icon available at the corner of the requester list headers. This opens the available columns that can be displayed in the list view. All those that are visible currently, will have the check box beside them selected.

2. To remove a column, remove the selection from the respective check box beside the column name.

3. To add a column to the list view, select the unchecked select box beside the column name.

4. To change the column order, click the up and down arrow after selecting the column that you wish to move.

5. Click **Save**.
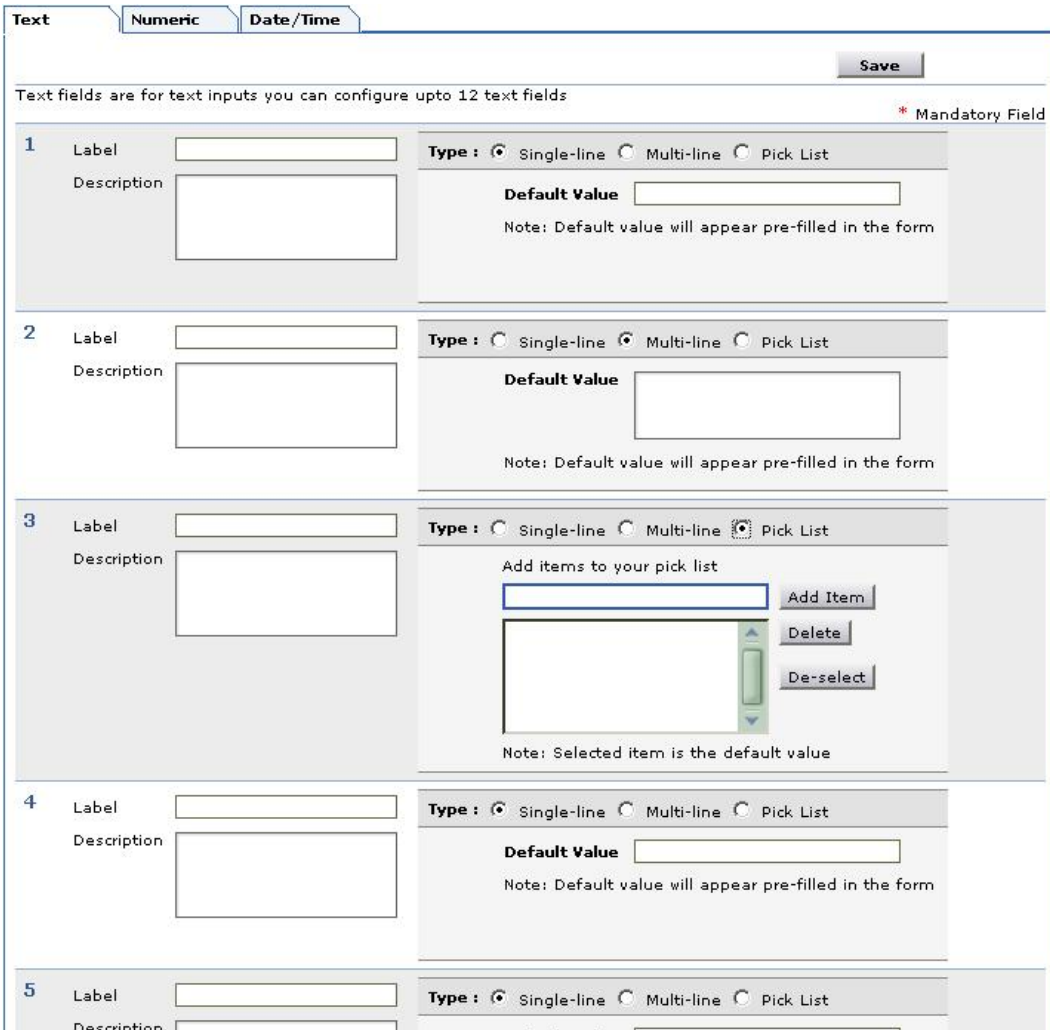
This will add only those columns which you have chosen in the list view. You can also sort the list view based on columns. To sort requester list by column, click the column header. Clicking it once will sort it in ascending order. Clicking twice will sort the column in descending order.

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 ![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. You can choose the type of text field that you wish to add by selecting the radio buttons. A Single-line text field allows you to add just a text field. The Multi-line text field allows you to add a text box where a lengthy description can be added. A Pick List allows you to add a list menu from which you can select. In all the three cases, you can add default values for the text field in the space provided for the same.

6. To add items for the pick list, enter the value in the text filed and click **Add Item**. The value will get added to the list below. To select the default selected value of the list, click on the value in the list.

7. To add numeric fields, click the **Numeric** tab and then enter the label name in the form fields provided for the same.

8. To add date/time fields, click the **Date/Time** tab and enter the required details.

9. 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. Enter the cost details of the technician in the **Cost per hour** field.

5. Select the **department** to which the technician belongs and enter his/her **job title**.

6. 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.

7. 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.

8. 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.

9. 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.

10. 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**.

	Note: Delete icon will not be available beside the name of the technician who has currently logged in to the application. To delete that technician, you need to log out and log in as a different technician and then delete the details. Also, the administrator technician details can be deleted only by another technician with administrative privileges.

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 enable or disable active directory authentication. By default the AD authentication will be disabled.

4. If you have already imported requesters from the any of the domains in your network, then click **Enable** button.

Even after enabling Active Directory (AD) Authentication, if you would like to bypass the AD Authentication, then in the application login screen, you need to select **Local Authentication** from the Domain list box after entering the login name and password, and then click **Login** button.

If you have not yet imported requesters from any of the domains, you can import them by clicking **Import Requesters from Active Directory** link. The **Import From Active Directory** window pops up.

1. From the list of domains that are listed in the **Domain Name** combo box, select the domain name in which the active directory from which you wish to import is installed. If the other details such as domain controller name, user name, and password have already been entered in the Domain scan page, then that will be populated automatically. Else enter the name of the domain controller in the **Domain Controller Name** field, login name and password in the corresponding fields.

2. You also have an option to select the fields to import from the active directory. The unselected fields will not be imported. This is to avoid over ridding of the new values by the old values from the directory.

3. Click **Import Now !**. The import wizard displays the various **Organizational Units** (OUs) available in that domain. Choose the specific OU from which you wish to import users by selecting the check box beside it.

4. Click **Start Importing**. 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.

Schedule AD import

1. You have an option to schedule Active Directory import in specified number of days.

2. Select the **Schedule AD import** check box. Specify the number of days in the text box. The requester details gets imported automatically once in specified number of days.

3. Click **saveADSync** button to be in sync with the active directory.

Robo Technician

Using Robo Technician you can reset the user password quickly & easily. This involves two steps process to reset the user password such as, 1) configure robo task 2) creating a request template.

To open the robo technician 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 **Robo Technician** icon 🤖. On purchasing the license for the robo technician the Robo Task Configuration page is displayed.

Configuring Robo Task

1. Click **Enable robo task** option to perform the robo task operations by clicking the enable icon. By default the status of the robo task would be disabled.

2. There are three blocks available in the configuring robo task page such as, **Task Options, Action On Success & Action On Failure**. In the Task Options block select **Password Reset Type** from the combo box. You have four passwords reset types such as,
   Random Password: In this case the robo technician assigns a random password to the user.
   Typed Password: In this type the logged in technician will enter the password in the given text field.
   Same as the User Name: The robo technician will assign the same user name as password.
   Blank Password: In this type the password assigned will be a blank password.

3. If you wish, you can select **User must change password on next login** check box. Generally this option should be enabled for security purpose.

4. On resetting the password successfully you can configure the corresponding actions to be performed in the Action On Success block. Select the **Request Status** you wish from the combo box.

5. Specify the **Resolution Details** in the text field.

6. If the password-reset action is failed then you can configure the corresponding actions to be performed in the Action On Failure block. To assign the event to the currently logged in user select **Assign to Invoker** check box.

7. Or you can assign it to the **Group** under which the problem is associated.

8. And also you can assign the problem to the corresponding **Technician**.

9. Specify the notes about the issue in the **Notes** text field.

10. Click **Save** button to save the details.

11. Click **Save and go to Template** button to go to the Request Template page.

Creating a Request Template

On installing Robo Technician it automatically creates a default Request Template for a particular Robo Task. You can also edit this request template based on your needs.
Example: Say if a user requests technician for password reset, and if the technician has already configured robo task, then he can create a request to reset password using this default template.

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 **Welcome Message,** which you wish to display as soon as the user reaches the survey page. or when the user is taking the survey.

6. **Email Content:** Specify the purpose of the email in the Email Content text field. This content will be displayed in the mail sent to the requesters. $RequesterName & $SurveyLink are variables which changes based on the requester & application URL.

7. **Success Message:** Enter the message that will be displayed once the survey has been successfully answered and submitted by the user.

8. **Failure Message:** 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. **Thanks Message:** Enter the thanks message. This message will be displayed just before the submit button in the survey form.

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. The options are,

    - **A request is closed:** For closing every one request a survey mail will be sent

    - **Requests are closed:** Specify the number of requests to be closed of all the available requests in the text box. Once the specified number of requests is closed a survey mail will be sent.

    - **Requests from a requester are closed:** Specify the number of requests to be closed for a requester in the text box. Once the specified number is reached a survey mail is sent to the requester. This text box can take only integer values as input.

11. Click **Save** to save the survey settings.

Survey Settings

Enable Survey

☐ Enable User Survey

Survey Details

Welcome Message

Please help us to improve our service by participating in this brief survey.

Email Content

Dear $RequesterName,

Please help us improve our service by completing this short survey. Your feedbacks and comments will help us to improve our service. We appreciate your time here.
$SurveyLink

Thanks and regards,
IT Admin.

Success Message

Your feedback has been sent and comments will be considered.

Failure Message

Your survey information for this request has already been received for consideration.

Thanks Message

Thank you for taking part in this survey.

Schedule Survey

Send Survey every time

◉ a request is closed.

○ [0] requests are closed.

○ [0] requests from a requester are closed.

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.

You can view the survey results filled in by the requester from this page. A survey is defined and a survey mail is sent to the requester. By sending the survey mail you ask the requester to answer the survey questions to improve the service provided by the technicians. The survey results answered by the requesters will be listed under this section.

	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

General settings has six different settings to be configured in Service Desk Plus such as, Display Language, My Task, Requester List, Requester Details, Alias URL, Customize ServiceDesk.
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.

Display Language

ServiceDesk Plus supports different languages as part of the application. You can choose default language of your choice to be displayed in the application. To select the language of your choice,

Click Browser default combo box. Select the language of your choice from the list.

Reminders

If you wish to show all your tasks as reminders to the requesters then select Yes radio button else select No option. The reminders will be shown in the home page.

Requester List

While entering the requester name in the new request form, the list of all available requesters will be automatically listed. If you wish to list the technicians name along with the requesters name then select Yes else select No button.

Requester Details

If you wish to allow the requester to edit their profile select Allow to edit their profile else select Not allowed to edit their profile

Alias URL

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.

Customize ServiceDesk

You can customize the application by choosing to display your custom logo. You need to add the logo in two dimensions, one for the login page and the other for the header image that you see on the top left corner of the pages once you login. The login page image should be of the dimensions 252 px x 61 px (W x H), while the header image needs to be 166 px x 46 px.

To import the login page image,

1. Click Import image … button.
2. Click Browse button.
3. In the file chooser window, select the file that you wish to import and click Open.
4. Click Import.

The image that you just imported will be replaced instead of the login page image. Follow the same process for header image also.

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. Custom Reports
2. Helpdesk Reports
3. Asset Reports
4. Survey Reports
5. Purchase Reports

About ServiceDesk Plus Reports

The ServiceDesk Plus reports are classified under the following heads:

- Helpdesk Reports
- Asset Reports
- Survey Reports
- Purchase Reports
- Custom 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.

Pending Requests Report: This shows the distribution of all pending 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 pending requests by category, pending requests by priority, pending requests by technician, pending requests by department, pending requests by due date, and pending requests by created date.

Completed Requests Reports: These reports show the distribution of completed and closed requests. Similar to the Pending 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 - Completed 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.

Time Spent Reports: These reports provide information on the technician's time spent on requests and the cost per technician based on the time spent. You can group the report information based on requester from whom requests were received, technician attending to the request, department, and category. The time spent report by requester, gives you an idea on the cost per requester and the number of request. Similarly, other request give this information depending on the criteria on which the report is generated.

By default, the help desk 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.

Custom Reports

If you are not able to find the report that you are looking for in the above out-of-the-box reports, then you can create your own report with the help of the custom report generation option.

Custom Reports

ServiceDesk Plus enables you to create reports that meet your need if you are unable to find them from the list of out-of-the-box reports already available. To create your custom reports

1. Login to ServiceDesk Plus application with the administrator user name and password.

2. Click **Reports** tab in the header pane.

3. Click **Create New Report** link available beside the **Custom Reports** sub-head in the reports home page. This opens the Custom Report Wizard that will help you navigate through the various steps involved in the creation of a custom report.

4. Choose the report type radio button. You can either create a tabular report or a matrix report.

5. Choose the module (Request / Inventory) for which you wish to create the report.

6. Click **Proceed to Report Wizard** button.

You can either create the reports based on a simple date/time criteria or use advanced filters to generate better reports with very specific information. There are three steps in the reports wizard before the report is generated.

Generating Tabular Reports

Tabular reports are simple reports that allow you to list your data based on certain criteria. You can select the columns to view and group the output data. If you had selected the **Tabular Reports** option in step 4 above, then follow the steps below to create a tabular report:

Filter Setting Step

1. If you are using the date / time filter criteria, select the required date column from the **Select Column** combo box.

2. Select the period for which you want to generate the report. If needed you can also provide a custom period by choosing the from and to date manually.

3. Click **Next**.

To use **Advanced Filtering**, you first need to select the radio button for matching all the selected criteria or any one of them. Then from the column listing, select the various columns and set the match operator and mention the values for matching.

Finally, click **Next**.

Columns to Display Step

Select the columns that need to be displayed in the tabular report from the **Available Columns** list box and click >> button to move them to **Columns to display** list box. If you want remove any column from the **Columns to display** list box, select the same and click << button.

Click **Next**. This leads you to the grouping of columns, where you can choose two levels of grouping.

Grouping Data Step

From the Select Column list box, select the column based on which you wish to group the data and choose whether you want the grouping to be ascending or descending. For the second level of grouping you need to do the same from the second list box available.

Click **Generate**. The report is generated and displayed as unsaved report. You can edit the report if you wish to by clicking the **Edit** button, which will take through the Report Wizard again. If you are satisfied with the report, click **Save**.

Enter the Report **Name**, which is a mandatory field and **description**, if any in the **Save Report** form. Click **Save Report**, else click **Cancel**.

You can export this report also to PDF format. To know how to export to PDF, refer to the section Exporting Report as PDF.

Generating Matrix Reports

Matrix reports provides the data in a grid manner (m x n format). It allows you to study different scenarios based on the chosen criteria. To create a matrix report, you must choose the corresponding radio button in the create report form. In the Filter setting stage of the Report wizard, follow the steps below:

Filter Setting Step

1. If you are using the date / time filter criteria, select the required date column from the **Select Column** combo box.

2. Select the period for which you want to generate the report. If needed you can also provide a custom period by choosing the from and to date manually.

3. Click **Next**.

To use **Advanced Filtering**, you first need to select the radio button for matching all the selected criteria or any one of them. Then from the column listing, select the various columns and set the match operator and mention the values for matching.

Finally, click **Next**.

Grouping Data Step

The information can be summarized based on two values; one for the rows and one for the columns. First select the row value for summarizing data from the **Select Column** list and then choose whether you want that in the ascending order or descending. Choosing this will activate the **Select Column** list box for the column grouping. Choose the column based on which you want the column information to be grouped and then whether you want the values displayed in the ascending or descending order.

Click **Generate**. The report is generated and displayed as unsaved report. You can edit the report if you wish to by clicking the **Edit** button, which will take through the Report Wizard again. If you are satisfied with the report, click **Save**.

Enter the Report **Name**, which is a mandatory field and **description**, if any in the **Save Report** form. Click **Save Report**, else click **Cancel**.

You can export this report also to PDF format. To know how to export to PDF, refer to the section Exporting Report as PDF.

Delete Custom Reports

You can delete the custom reports that you have created and saved. Just click **Delete** link available against the custom report that you wish to delete. This will delete the report.

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 te **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:
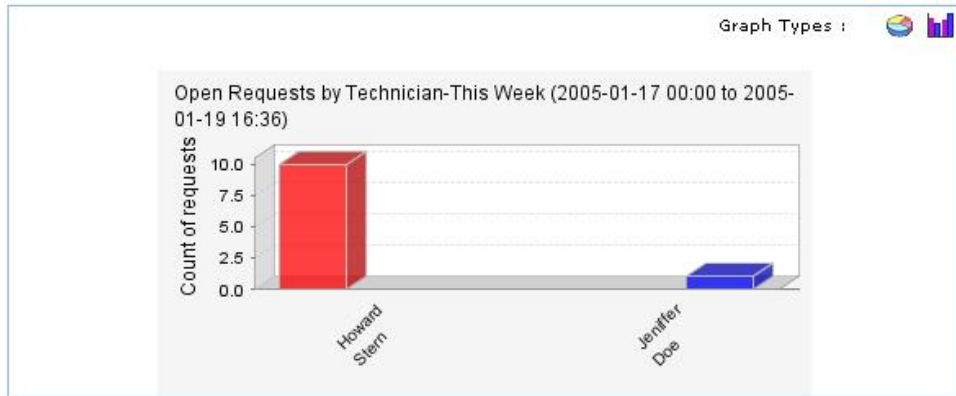
To view the report as a pie chart, click the ⊕ icon. To view it as a bar chart, click the 📊 icon.

In case of the **time spent reports**, you can also select the requester / technician / department / category for which you wish to generate the report, depending on the report type. This will give you the report for only the selected value.

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 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.

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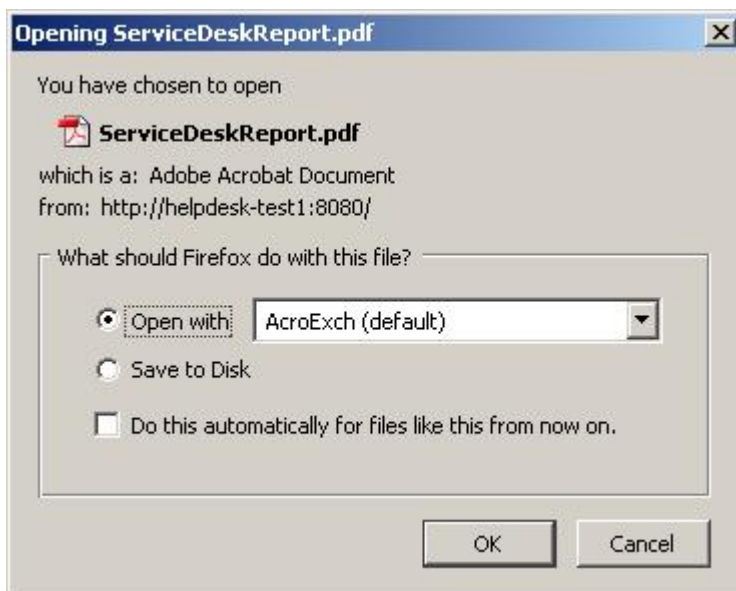
4. Click **OK**. The PDF document is opened in your default PDF reader.
5. Save the PDF document for future reference.

General Features

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

- License Expiry display
- My View displaying your request summary
- Publishing organization wide Announcements
- Global view displaying details regarding purchase orders delivery statistics, contracts expiry statistics, and request related graphs
- Reminders
- Viewing the error logs from Support
- Feedback
- Personalize
- List of the last ten Recent Items viewed in the application
- Data back up and restore options
- Changing Web Server Port

Login Index Page

The login page of all users of ServiceDesk Plus has various useful information displayed that enables an administrator, a technician , or a requester to take necessary action. The following are available in login home page, based on the login credentials of the user:

1. My View that displays the request summary. In the requester login, the dashboard displays the number of open requests raised by them, closed requests raised by them, and all requests they have raised.

2. Tracking your tasks using the Reminders section.

3. Add, Edit, or Delete Announcements that can be displayed for all users of ServiceDesk Plus or only to the technicians.

4. Global view providing information on purchase order delivery schedules, contracts expiring schedules, and request related graphs.

5. License Expiry alert and prompt for registering ServiceDesk Plus.

License Expiry Alert

Just below the header tabs the license expiry alert will be displayed as shown below,

Attention !

Your AdventNet ManageEngine ServiceDesk Plus License is about to expire in **15 days.**
Renew your License before **Thu, 15 Mar 2007**

To purchase a new license, contact sales@adventnet.com If you have already purchased a new license click here to apply

Remind me again after [1 day ▾] [OK]

The license expiry alert provides remaining number of days for the existing license to get expired. And also it provides the date by which the license has to be renewed. The option to purchase the license such as sales contact email ID, link to apply the upgraded license are also provided.

You have an option where you can set the number of days after which you want this reminder to be displayed. Once you choose the number of days from the combo box, click **OK**, the reminder will disappear and will again be displayed after the specified time frame.

If you do not want to choose the number of days and want the reminder to be available every time you login, then clicking **Hide** link at the top left corner of the license expiry alert box will temporarily hide the alert box.

To register ServiceDesk Plus, you can just click the link **click here to apply** in the license alert box. This opens the license upgrade window. To apply the license, refer to the topic Registering ServiceDesk Plus.

My View

ServiceDesk Plus login home displays **My View** page with information on the request summary of the requests assigned to the user who has logged in. In the case of requesters, **My View** displays information regarding the requests that have been raised by them. For more information on the requester login home My View, refer to the **Self Service Portal** help.

In the technician / administrator login of ServiceDesk Plus, My View tab displays the following information:

1. Number of overdue requests that are assigned to the user.

2. Number of requests that are due for that day.

3. Number of pending requests that are assigned to him/her.

Clicking the links to open the corresponding list view.

Publishing Announcements

ServiceDesk Plus allows you to publish announcements company wide or just to the technicians group. The announcement board is available in the login home just below the my view requests tab. You can add, edit, and delete announcements.

Announcements

NEW A demo scheduled for softcel

NEW A webinar to be conducted for eServe, Chennai

Thanks giving preprations start

The recent announcements will be displayed in the box. To view all the announcements (even completed ones), click the **Show All** button. This will display the list of all announcements added till date.

To view an announcement, click the **Announcement Title** to open the complete announcement details in a pop-up. If there are more than one announcements, then you will notice a **Previous** and **Next** button in the pop-up. Using this you can navigate through the announcements list and view all the announcements without closing the pop-up window.

Add a New Announcement

To add a new announcement

1. Login to ServiceDesk Plus using the administrator / technician user name and password.
2. In the login home page, if you have permissions to add an announcement, you will notice the **Add New** button in the announcements box as shown above. Click the button. The **Add New Announcement** dialog pops up.
3. Enter the Announcement Title. This can be a short statement that describes the announcement.
4. Type the **Announcement Content** in the text box provided for the same.
5. Select the **From** date and **To** date using the calender icon beside the respective fields.
6. If you wish to publish the announcement only to the technicians and do not wish to expose it to your requesters, then select the check box **Show this announcement only to technicians**. The announcement will be displayed in the home page with a lock beside it.
7. If you wish to **Send this announcement as mail** then select the corresponding option by enabling the check box.
8. Click **Save**. At any point of time, you do not wish to add the announcement, click **Cancel**.

The announcement will be added and the pop-up will display the announcement adment details as entered by you. The announcement title will be displayed in the login home in bold text in the announcement box with a new icon beside it.

Edit an Announcement

To edit an announcement

1. Login to ServiceDesk Plus using the administrator / technician user name and password.

2. In the login home page, click the title of the announcement that you wish to edit. The announcement details are displayed in a **View Announcement** pop-up. If you have permissions to edit / delete the announcements, you will see an **Edit** and **Delete** button.

3. Click **Edit** button.

4. You can change all the fields of the announcement in the Edit Announcement form.

5. Click **Save**. At any point of time, you do not wish to edit the announcement, click **Cancel**.

All the changes made in the announcement will be saved.

Delete an Announcement

To delete an announcement

1. Login to ServiceDesk Plus using the administrator / technician user name and password.

2. In the login home page, click the title of the announcement that you wish to delete. The announcement details are displayed in a **View Announcement** pop-up. If you have permissions to edit / delete the announcements, you will see an **Edit** and **Delete** button.

3. Click **Delete** button. A confirmation dialog pops up.

4. Click **OK** to delete, and **Cancel** to retain the announcement.

Alternatively,

1. Login to ServiceDesk Plus using the administrator / technician user name and password.

2. In the login home page, click **Show All** button in the **Announcements** box.

3. In the announcements list view, select check boxes beside the announcement Title which you wish to delete.

4. Click **Delete**. A confirmation dialog pops up.

5. Click **OK** to delete, and **Cancel** to retain the announcements.

> **Note:** If the announcements are open for everyone to view and not restricted to the technicians alone, then in the requester login, the requesters will be able to view the announcements by clicking the title of the announcements. Only announcements that have a completion time beyond the current date will be visible for the requesters.

Global View

Global view is available depending on the login authorization permissions provided to the various technicians. If you have permissions for the same, you will be able to see the **Global View** tab just beside the home page **My View** as soon as you login to the application.

The global view displays the following information:

1. You can view the status of requests by Technician, Category, level, Priority & Mode in table format. This denotes the number of requests in various status for each of the above mentioned fields.

2. A graph on request inbound for a specific time period. You can select the time period from the combo box.

3. Contract Summary that provides the number of contracts have already expired, are about to expire in the next 7 days, and are about to expire in 30 days.

4. Purchase Order Summary report that provides details on the number of Purchase Orders that are already overdue on delivery schedule, number of POs that will cross the delivery schedule in the next 7 days, and next 30 days.

The above information provides the administrator an idea on what are the entities that require immediate action to be taken so as to avoid any SLA violations (requests) or contract expiry. It also helps the administrator to contact the vendor to get an update on the status of the purchase order and hence avoid delays in the delivery of the items.

Add Reminders

ManageEngine ServiceDesk Plus provides you with the option of tracking your tasks everyday. The tasks that you add to the **My Reminders** 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 reminders list

1. Log in to the ServiceDesk Plus application using your user name and password.

2. Click **Reminders** link ⟨ Reminders ⟩ just below the header tabs. **My Reminder (s)** form is opened. Click **+Add New** link at the bottom of the my reminders form. This opens **Add Follow-up task** page.

3. Enter the task summary in the text field provided at the left side of the page.

4. Select the **Date & Time** for the reminder. The date field is set to the today's date and the time is set by default as 11:00 AM. Change the date and time settings. To change the **date**, click the calender icon beside the date field and choose the date of your choice. 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.
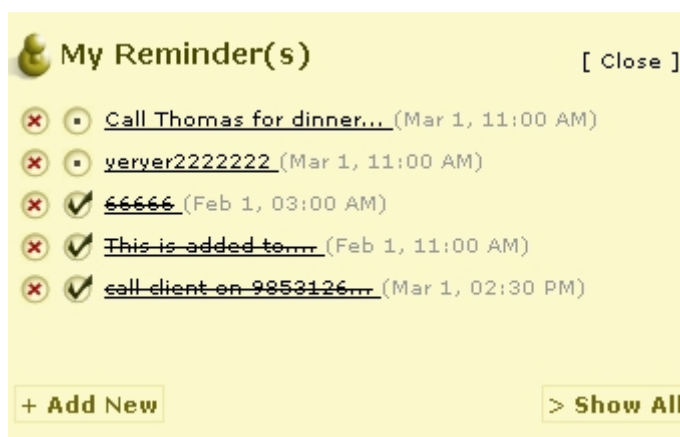
5. Select the reminder duration say before 1 hr or 2 hr from the **Remind me before** combo box. By default the message would be **Never.**

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 radio button beside the task summary. Alternatively,

1. Click the **Reminders** link. This opens **My Reminders** form.

2. Click the task status radio button ⊙ in the reminders form to change the task status from incomplete to **Completed**. 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 Reminders** note. The **All Reminders** window opens.

Showing All Reminders

Showing All reminders sorted descending based on date

Delete	Change Task State To : ---Select--- ▼	Change

☐	**Task Date**	**Task Summary**
☐	2005-01-18 12:00 AM	Test
☐	2005-01-18 11:30 AM	Testing the my tasks feature
☐	2005-01-19 12:00 AM	New Task

2. Select the check boxes beside the **Reminder Summary** for which you wish to change the state.

3. Select the state from the **Change Reminder State To** combo box, select the reminder state to **Completed**.

4. Click **Change** button to change the status of the task. To indicate the change the task would be striked of.

5. Click the title of the task. This opens Follow-up task window. View the task details as well as the status of the task. To view the changes in the ServiceDesk Plus home page, refresh the page.

You can delete a task by clicking the delete icon beside the task. Alternatively,

1. Click the **Reminders** link. This opens **My Reminders** form.

2. Click the **Delete this Task** radio button ⊗available beside the status radio button.

You can also delete the tasks by following these steps:

1. Click **Show all** at the bottom right of the **My Reminders** note. This opens All Reminders window.

2. Select the check boxes beside the **Reminder Summary** of the tasks to be deleted.

3. Click **Delete**. A pop up window pops up to get your confirmation on the delete operation. Click **OK** to proceed. The task is deleted from list. To view the changes in the ServiceDesk Plus home page, refresh the page.

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.

Feedback

If you are connected to the network you can send your feedback about ServiceDesk Plus immediately to our support team.

To send your feedback,

1. Log in to the ServiceDesk Plus application using your user name and password.

2. Click **Feedback** link available at the top left corner of the page. This opens the Feedback pop up window.

3. The **To** address will be in non-editable format to our support team . Specify Your **Name, Your email ID, Subject** of the mail **and Message** mail content in their corresponding fields.

4. Click **Submit** button to send the mail.

Personalize

You can localize your display language as well as change your login password using this option. Apart from the option of changing password from the user management configurations, you can also change your individual password.

1. Log in to the ServiceDesk Plus application using your user name and password.

2. Click the Personalize link available at the top left corner of the page. This opens Personalize page which has two tabs such as **Display language** and **Change Password.**

Display Language

1. The default page displayed will be the **Display Language** page. Select the language of your choice from the list. The selected language will be you default display language in the application. All the data will be displayed in the language selected by you.

2. Save the details to change the display language to your local language.

Change Password

1. Click the Change Password tab in the personalize page. This displays the Change Password form.

2. Enter your old password in the **Current Password** field.

3. Enter your new password in the **New Password** field.

4. In the **Confirm New Password**, enter the new password again.

5. Click **Save** button.

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 5 -> 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> <http or https>

    The web server port will be reset to the new port number that you have specified.

    https - To start the ServiceDesk Plus server in https mode.

    http - To start the ServiceDesk Plus server in http mode. By default, executing the file as changeWebServerPort.bat <new port number>   will start the server in http mode.

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> <http or https>

    The web server port will be reset to the new port number that you have specified.

    https - To start the ServiceDesk Plus server in https mode.

    http - To start the ServiceDesk Plus server in http mode. By default, executing the file as changeWebServerPort.bat <new port number>   will start the server in http mode.

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.

Error Message	Either access denied for the user or the remote DCOM option might be disabled in the workstation
Cause	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.

Resolution	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

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.

Top

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.