ManageEngine ServiceDesk Plus

User Guide

ManageEngine **ServiceDesk** plus

Helpdesk and Asset management Software

AdventNet
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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.

To make the process of reporting the issues to the IT help desk easier, ManageEngine ServiceDesk Plus provides you with a Self-Service Portal where you can log your complaints and issues online with the help of a web-based form. Once you have filed your issue, it gets listed in your request view page, where you can keep track of the logged issue. You can also update your personal information using the Self-Service Portal. In the Self-Service Portal, you will be able to access the following modules:

Requests: You can create a new request and view the same. Also all the requests that you have raised till date will be saved in your requests module for future references.

Solutions: From the solutions knowledge base that has been developed and maintained by your IT help desk team, you can search for solutions for the issue that you are currently facing. If you do not find any solution for the problem at hand, then you can post your issue as a request to the help desk team.

My Details: You can view and edit your account details including your password. This updated information will be displayed whenever your information is requested.

Request

Requests

ManageEngine ServiceDesk Plus provides you a Self-Service Portal with the request module. Here, you can create new requests to post your concerns and issues to the IT help desk team. You can also view the request that you have posted and keep track of its status. Once the request is closed, you can view the same in the closed requests.

Creating a New Request

Creating a New Request

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

To create a new 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.

Additional Request Details

These are custom fields that are created by your IT help desk administrator for a specific purpose. Based on the field label name and its definition, fill in the necessary details in the respective format. These fields can be of three types, such as numeric, text, and date. For the fields that take date as input, the calender is available beside the field. You can select a date by clicking the calender icon .

Requester Details

In this block, your name and the workstation that has been associated with you are displayed. The **Name** is non-editable. From the **Workstation** drop-down list, select the workstation to which the issue that you are submitting is related. Depending on the configurations set by the ServiceDesk Plus administrator, the workstation list will have all the available workstation in your organization or it may have only the workstations that are associated with you. Selecting the workstation is not a mandatory requirement. Only if the issue is related to the workstation, you need to select it.

Classifying Request Category

The **Category** drop-down box, in the **Task Details** block, lists the categories under which a request can be classified. Select the relevant category to which your request can be grouped. You can also click the category chooser icon available beside the category drop down list to choose the category.

Prioritizing Request

The **Priority** drop-down box, in the **Task Details** block, lists the priority levels that can be assigned to a request. Choose the relevant priority level for your request from the list displayed.

Describe Request

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

Add Attachments to the Request

1. In the **Task Details** block, below the **Description** text box, click the **Attach a File** button. Click this. This opens an **Add/Remove Attachment** pop-up window.

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

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

Modes of Creating a Request

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

1. **E-mail** the request to the help desk team. This e-mail will automatically be changed to a new request in the ServiceDesk Plus application and any actions to be performed on the request will be immediately taken into notice.

2. Call up the IT help desk agent and report an issue or explain the nature of your request. The help desk agent will manually feed in the details into the application through the web-based New Request form available in the Request module.

Viewing a Request

Follow the steps given below 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 **Request** tab in the header pane. The next page lists all the **Open** requests available in the ServiceDesk Plus application. If there are any requests that have not been assigned any technician then they will appear in bold font.

3. Click the **Title** of the request that you want to view. This opens the **View Request** page.

4. The request header has the request ID, category of the request, level, its status, and priority. Then the requester name, due date, request summary, and request description are displayed. Below this, the request details containing mode of request, technician attending to the request, created date, and due date are displayed. Finally, the requester details are displayed below the request details block. If there are any attachments to request, click on the file that is attached to view the same.

5. Click the **Resolution** tab to view the resolution for the request.

6. To view the history of the request, click the **History** tab.

7. To view all the replies that have been sent to you, click the **Replies** tab in the center pane. All the notifications will be listed in the ascending order of the date and time when they were sent.

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

The **Notes** added to the request are appended below **Task Details**. The notes are displayed in the descending order, with the recently added note displayed first.

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. The print preview of the request is opened in a pop-up window.

5. Click the **Print** menu item from the browser **File** menu list.

6. The default printer associated with your workstation is invoked. Set the required options and click **OK**. You can collect the printed copy of the request at the printer that is linked to your workstation.

Adding Notes

After posting a request, if you want to add additional information about the request, use **Add Notes**.

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. In the **View Request** page, on the right side **Tasks** block, click the **Add Notes** link. The **Add Notes** pop-up window is displayed as below:
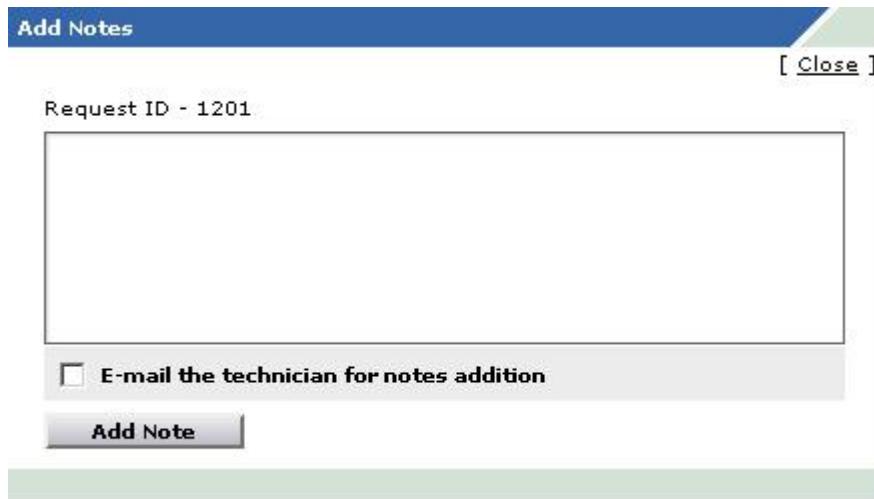
5. Enter your content in the text box below the **Request ID**.

6. If you wish to notify the technician in-charge of your request about the addition of the note, then select the check box **E-mail the technician for notes addition**.

7. Click **Add Note**. The note is added at the bottom of the request along with a date and time stamp. Your name is also displayed.

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

> **Note:** You will not be able to delete any of the notes in a request even though you have added them. Only technicians can delete the notes added to a request.

Viewing Request Resolution

When the IT help desk team resolves a request, they can add the resolution for the request. If a resolution is added for the request, you can view it by following these steps:

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 **Title** of the request for which you want to know the resolution.

4. In the **View Request** page, click the **Resolution** tab in the center pane.

5. The request header is retained as is from the request view. Just below that you will find the resolution for the request, if it had been added by the technician who attended to the request. Or else, a message stating that ***No Resolution Available*** is displayed. The resolution has information of who created it, creation date and time, resolution title, and detailed description.

Viewing Request History

The various actions performed on a particular request are stored in the request history for future reference and auditing purposes.

To view the request history

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 for which you need to know the complete history.

4. In the **View Request** page, click the **History** tab in the center pane. This displays the complete history of actions that were performed on the request from the time of its creation.

5. If a resolution was added or updated, you can view the resolution details and compare the old version of the resolution with the updated one. To do this, click the links **Show Details** or **Compare** link. The Show Details link shows you the details of the resolution in a separate pop-up window. Clicking the Compare link opens a new window with the updated request and the old request displayed one below the other.

6. Once you have checked the details of the resolution, click the **Close** button to go back to **History**.

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.

Viewing the Requester Details

1. Click the **Request** tab in the header pane.

2. Click the **Title** of a request.

3. Click the **Requester Name** link in the **Requester Details** block. The **View Requester Details** window 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.

4. Once you have finished viewing the details, click the **Close** link.

Alternatively, you can also click the **My Details** tab in the header pane to view your personal details.

Viewing all Replies

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

1. 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 **Title** of the request for which you wish to check the conversations.

In the **View Request** page, the various mails between you and the technician in-charge will be displayed under the head **Conversations**.

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 your **user name** and **password**.

2. Click the **Requests** tab.

3. In the Requests list view select the **My Closed Requests** filter.

4. Click the request **Title** for which you wish to see the survey results.

5. Click **View Survey Results** link available under the **Tasks** block. The survey results opens in a pop-up window.

6. Once you have viewed the results, click the **Close** button.

Note:

1. The View Survey Results link appears only if the you have completed taking the survey. Else this link will not be present.

2. Once the survey is submitted, the responses cannot be changed.

Viewing Requests Based on Filters

ManageEngine ServiceDesk Plus allows you to view the list of all your requests. You can also apply various filters to this list and view only a specific group of requests. To view the whole list of requests posted by you, click the **Request** tab in the header pane. This lists all the open requests that you have submitted. You can set the number of requests that you would like to view in a single page

1. In the **Requests** list page, click the drop-down box available as shown in the figure below:

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

There are more filters which can be used as explained below.

My Open Requests

When you click the requests tab, this filter is selected by default and lists all the request that are in the open status. Alternatively, from the home page, when you click the **Open Requests** in the **My Requests Summary** dash board, you can view all your open requests.

My Closed Requests

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

1. Click the **Requests** tab in the header pane to open the **Requests** list page.

2. From the **Filter** drop-down box, select **My Closed Requests**.

Alternatively,

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

2. In the **Home** page, in the **My Requests Summary** dash board, click **Closed Requests**.

All My Requests

To view all the requests irrespective of their status

1. Click the **Requests** tab in the header pane. This opens the **Requests** list page.

2. From the **Filter** drop-down box, select **All My Requests**.

Alternatively,

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

2. In the **Home** page, in the **My Requests Summary** dash board, click **All Requests**.

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.

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.

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.

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.

My Details

When creating your login details in the ServiceDesk Plus application, your profile would have some default information. In the **My Details** section of the Self-Service Portal of ServiceDesk Plus, you are allowed to modify the information relating to your profile, including the password. This helps you maintain your profile updated with the latest changes. It also gives you the freedom to edit your profile at your will.

Editing My Details

You can edit your details through the Self-Service Portal and need not depend on your IT help desk team to do the same for you. It enables you to modify your own profile whenever you want and saves considerable time.

To edit your profile

1. Log in to the ServiceDesk Plus application using your **user name** and **password** to access the Self-Service Portal.

2. Click the **My Details** tab on the header pane. The next page displays your user profile as created/edited last time in an editable form.

3. All the fields in this form are editable. Your **name** and **e-mail** ID are mandatory fields in the form. You can choose to leave the other fields blank. The information that you can edit are your name, employee ID, e-mail, phone, mobile, department name, and job title.

4. To change your department name, you need to select from the list of departments that are available in the drop-down list provided against the **Department** field.

5. When you are done with the modifications, click **Update Details**.

Changing Password

To change your password

1. Log in to the ServiceDesk Plus application using your **user name** and **password** to access the Self-Service Portal.

2. Click the **Change Password** link available at the top right corner of the page, just beside the **Logout** link. This opens the **Change Password** form in a new pop-up window.

3. Enter your **Current Password** followed by your **New Password** in the respective text fields provided for them.

4. Retype your new password in the text field against **Confirm New Password**.

5. Click **Change Password**. If you want to exit this window without changing your password, click **Close**.

Solutions

ManageEngine ServiceDesk Plus gives a provision to add resolutions for all the requests that have been posted. These resolutions can be directly converted to knowledge base articles that are grouped under the solutions head. If your help desk team has already added such knowledge base articles to the solutions section, then you can search for solutions specific to your problem and fix it. Thus, the solutions module serves as a knowledge base to find solutions for known problems using the keyword-based search.

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

Browsing Solutions by Topic

To browse the available solutions by individual 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 center pane, just below the heading **Browsing - All Topics**, all the available topics under which the solutions are grouped are listed. Click the topic which you want to browse.

Alternatively, on the top right corner of the **Browsing** block, a combo box with all the available topics and subtopics listed is available. From this list, choose the topic to which you wish to go. All the solutions available in that topic are listed in the resulting page.

Searching the Solutions

ManageEngine ServiceDesk Plus provides you an option to search solutions for the issues using the keyword search.

To search for specific solutions

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

2. On the left side, there is a **search** block.

3. In the **Enter Solutions Keyword** test area, enter your search string.

4. Click **Go** or press the **Enter** key on your keyboard.

The search option is accessible from any of the modules in the application.

General Features

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

- Tracking your daily tasks

- List of the last ten Recent Items viewed in the application

- View company wide Announcements.

Tracking My Tasks

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

To add new tasks to your task list

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

2. Click **Add New** at the left bottom of the **My Tasks** note or click **New Task** link below the header pane. A new task form is opened. In the add new task form, the date field is set to the today's date and the time is set by default as 00:00 AM. Change the date and time settings.
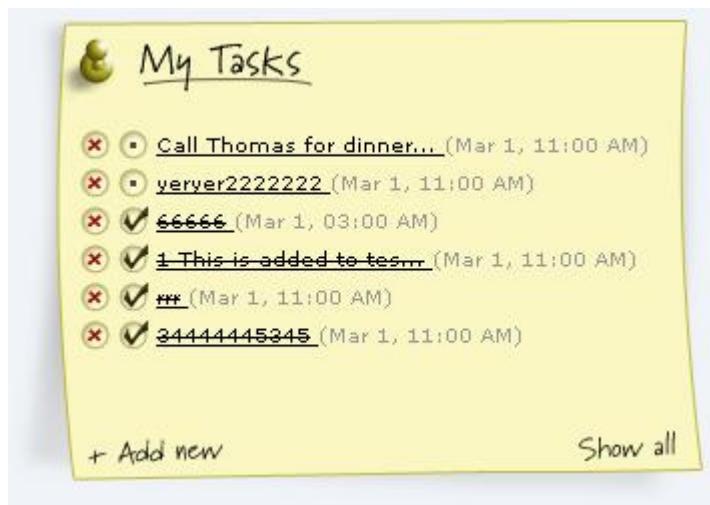
3. To change the **date**, click the calender icon beside the date field and choose the date of your choice.

4. From the Time combo box, choose the time at which the task is scheduled. The values in the combo box are available in a gap of 15 min time interval.

5. Enter the **Task Summary**.

6. Click **Add**. The new task is added and is listed along with the already existing tasks in the ascending order of date and time.

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

1. Click the hyperlinked task summary. An Edit Task form is opened.

2. In the **Task State** field, select **Completed**.

3. Click **Edit**. The task is struck through to indicate that it is completed.

You can also change the task state by executing the following steps:

1. Click **Show all** at the bottom right of the **My Tasks** note. The All Reminders window opens.
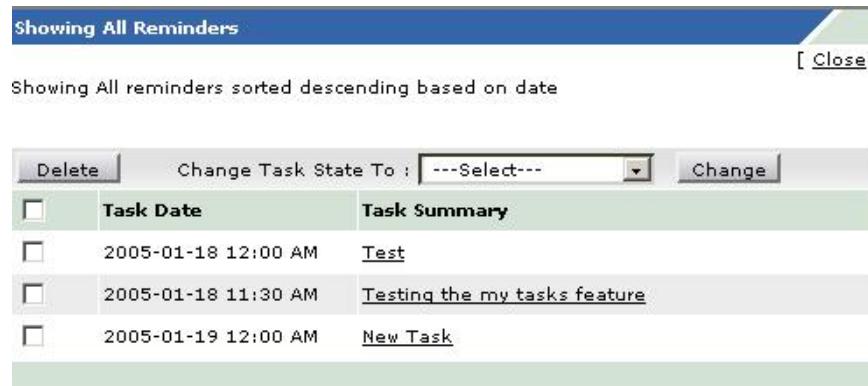
2. Select the check boxes beside the **Task Date** of the tasks for which you wish to change the state.

3. From **Change Task State To:** combo box, select **Completed**.

4. Click **Change**. The task state is changed in the **All Reminders** window. For the same to be reflected in the ServiceDesk Plus home page, refresh the page.

5. Click **Close** in the **All Reminders** window.

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

1. Click the hyperlinked task summary. An Edit Task form is opened.

2. Click the **Delete this Task** link available at the top left corner of the window.

You can also delete the tasks by following the steps below:

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

2. Select the check boxes beside the **Task Date** of the tasks for which you wish to change the state.

3. Click **Delete**. The task is deleted from the **All Reminders** window. For the same to be reflected in the ServiceDesk Plus home page, refresh the page.

4. Click **Close** in the **All Reminders** window.

The advantage of moving the task to Completed state instead of deleting it completely is that, you can revert the state of the task to **Open** again and edit its attributes. But once you delete the task, it is completely removed from the application and cannot be retrieved.

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.

Announcements

All the company wide announcements that are published by your help desk administrator will be displayed in the announcements block in your login home page.

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.