
ManageEngine ServiceDesk Plus

# Admin Guide

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# Introduction

ManageEngine ServiceDesk Plus 7.5 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 7.5 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
- Problem
- Change
- Solutions
- Assets
- 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 7.5, 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, approved/unapproved changes by the logged in technician, open and unassigned problems assigned to the logged in technician, 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.

## Problems

The objective of Problem Management is to minimize the adverse impact of Incidents and Problems on the business that are caused by errors within the IT infrastructure, and to prevent recurrence of Incidents related to these errors. In order to achieve this goal, Problem Management seeks to get to the root cause of Incidents and then initiate actions ti improve or correct the situation.

## Change

The goal of Change Management is to ensure that standardised methods and procedures are used for efficient and prompt handling of all Changes, in order to minimise the impact of change-related incidents upon service quality and consequently to improve the day-to-day operations of the organization.

## 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.

## Assets

Assets tab helps you to track & manage your assets efficiently. It tracks all your newly added assets, and have a record of all the assets in the organization. Assets can be categorized as IT, Non IT Assets & Asset Components in an organization. This includes Workstations, Printers, Routers, Software Licenses, Scanners, Projectors and even your air conditioning systems. Thus it offers a single view to track and manage all your assets in the organization.

## 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 Assets 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 assets 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

| Parameter | Base Requirement | Optimal Requirement |
|---|---|---|
| CPU | Pentium III 800 MHz or above | Intel Core Duo 1.7 GHz or above |
| RAM | 512 MB or above | 2 GB or above |
| Disk Space | 5 GB | 50 GB or above |
| Display | | |

## Operating System

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

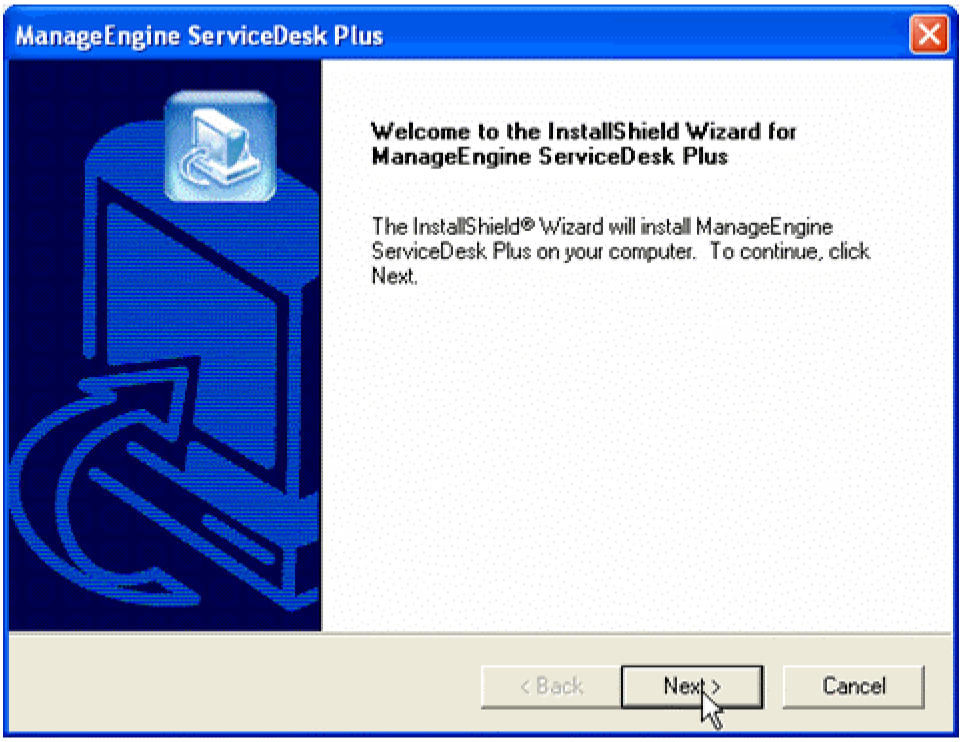
# Installation and Getting Started

* In Windows
* In Linux

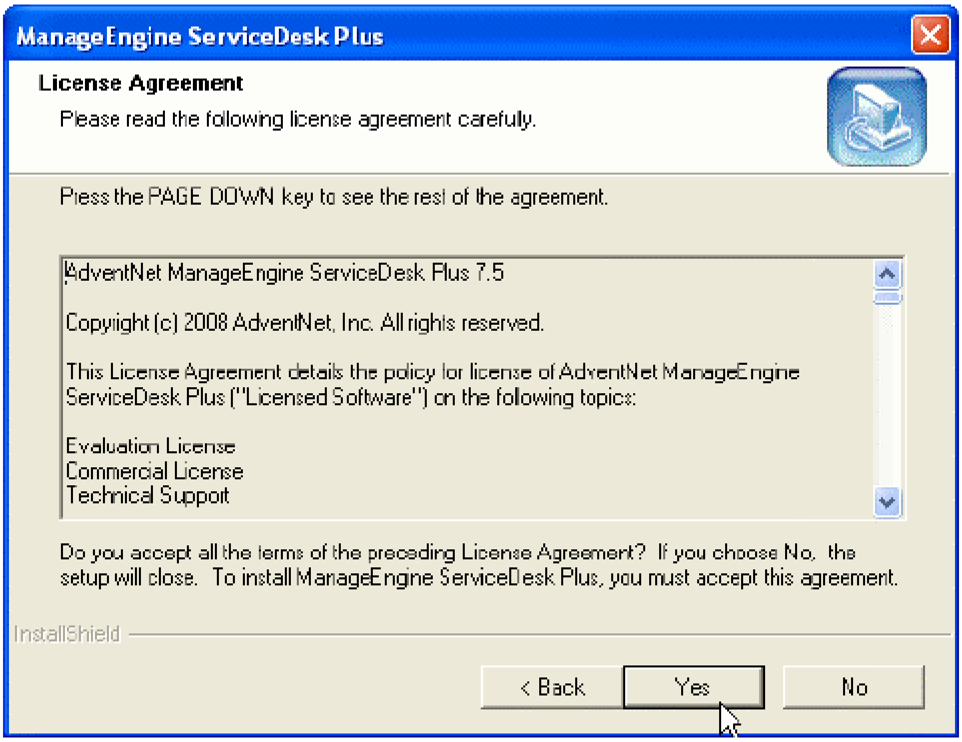
## In Windows

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

1. Download the **ManageEngine_ServiceDesk_Plus_Windows.exe** file.
2. Click the exe file to start the installation. The ServiceDesk Plus installation wizard appears as shown below,

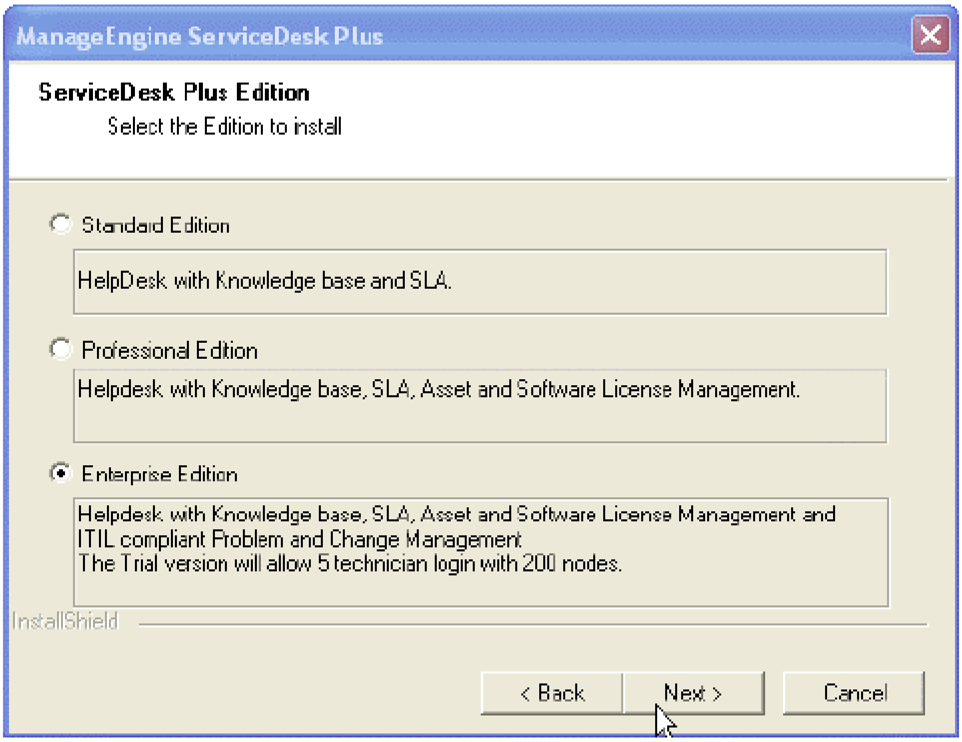



3. Click **Next** to proceed with the installation.
4. The second screen displays the License Agreement. You need to accept the license agreement to proceed with the installation. Click **Yes** to accept.

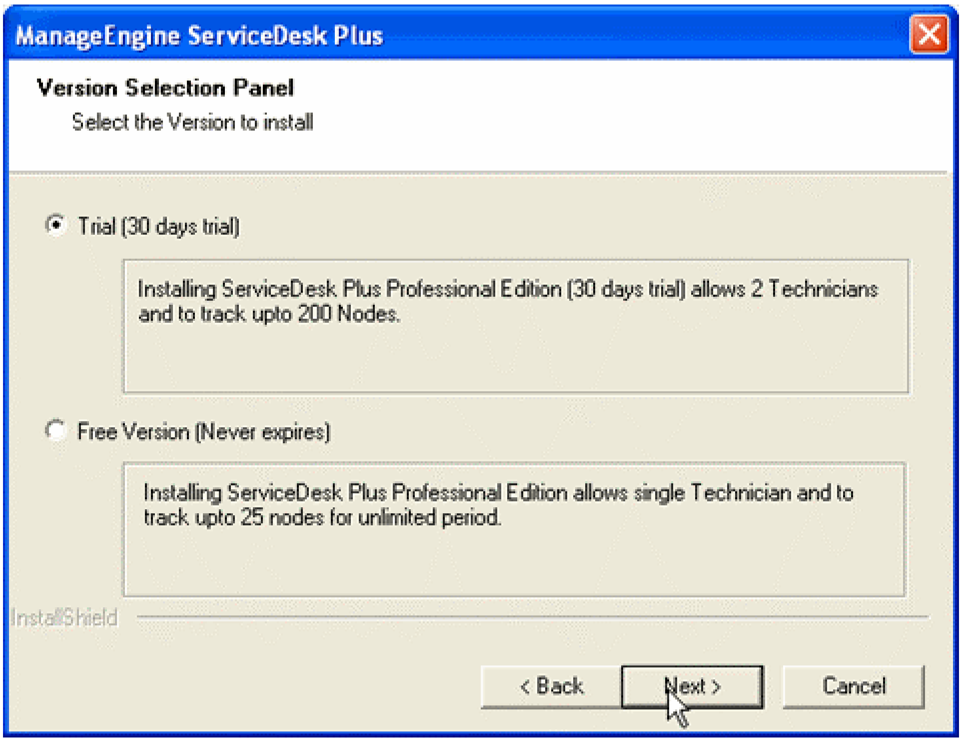



5. On accepting the license agreement, the installation wizard provides you with the option to choose between the **Standard**, **Professional** and the **Enterprise Edition**.

   **Standard Edition** - This edition offers helpdesk management, self-service portal, knowledge base, SLA management and helpdesk report to help you manage and track your requests.
   **Professional Edition** - This edition offers Software compliance & license tracking, Product Catalog, NMS integration, Asset Reports and few other asset related process along with the features of Standard Edition.
   **Enterprise Edition** - This is an ITIL ready Helpdesk. It includes all features of Professional Edition plus Incident managment, Problem management, Change management & Configuration management database(CMDB).

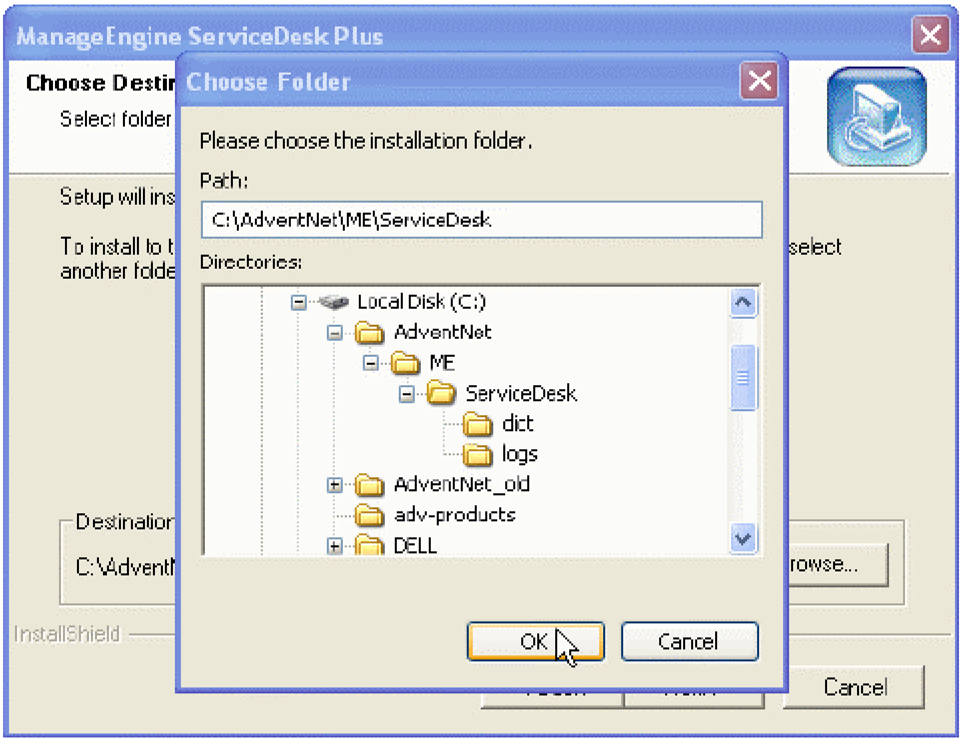



A free and trial version is provided for Standard and Professional Edition. The **Free Version** never expires and is restricted to a single technician login with 25 nodes. The **Trial Version** is valid only for 30 days and allows 2 technician logins with 200 nodes. The Enterprise Edition is provided only with a trial version which is valid for 30 days with 5 technician logins with 200 nodes.



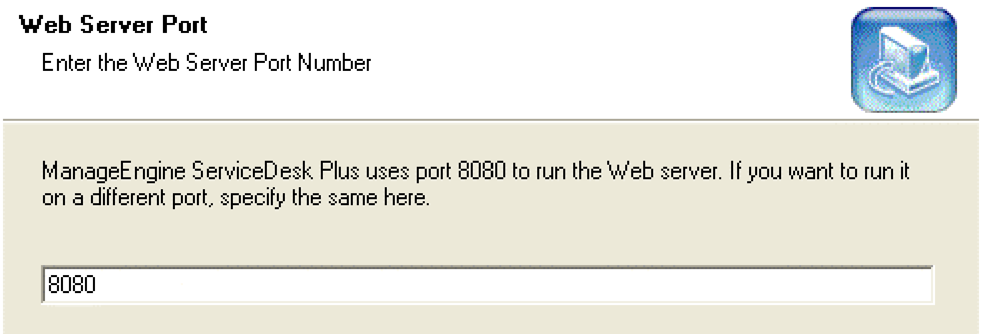
6. The next step is choosing the installation directory. By default, the application is installed in *C:\AdventNet\ME\ServiceDesk* directory.


If you want to change the installation directory, then, click the **Browse** button beside the directory path. From the file chooser window, choose the directory of your choice and click **Ok**.




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

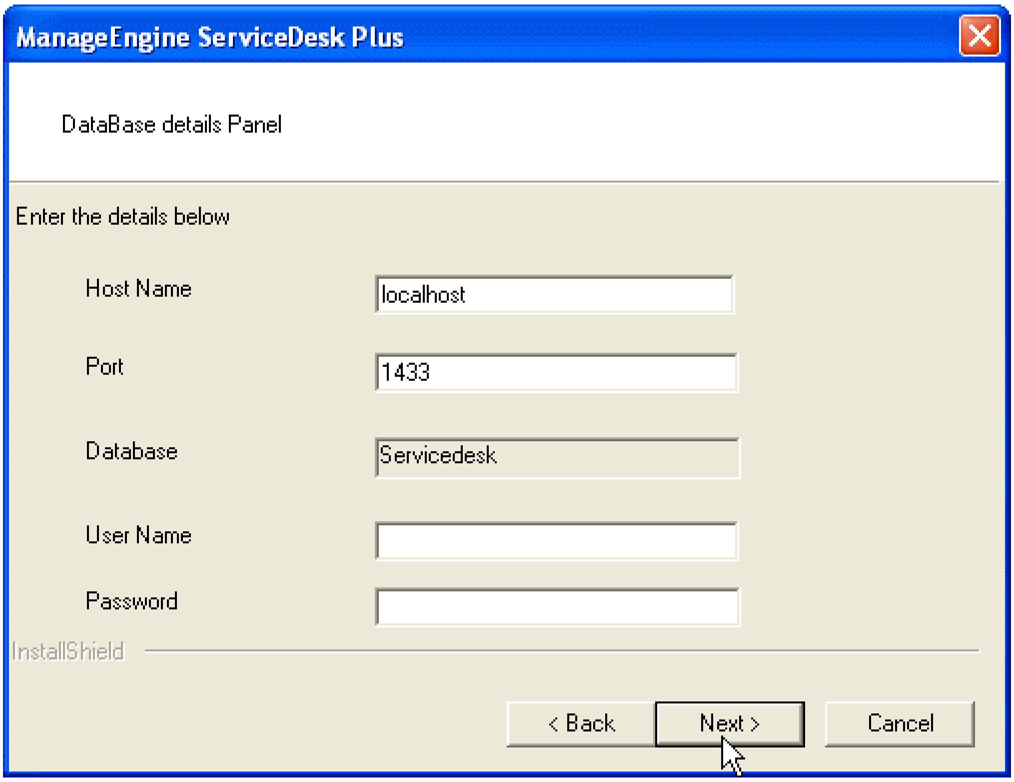
7. Provide a name that needs to appear in the **Program Folders**. By default, it is **ManageEngine ServiceDesk Plus.** Click **Next**.
8. Enter the port number that has to be used to run the web server. The default port number provided is **8080**. If you already have any application running in that 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**.



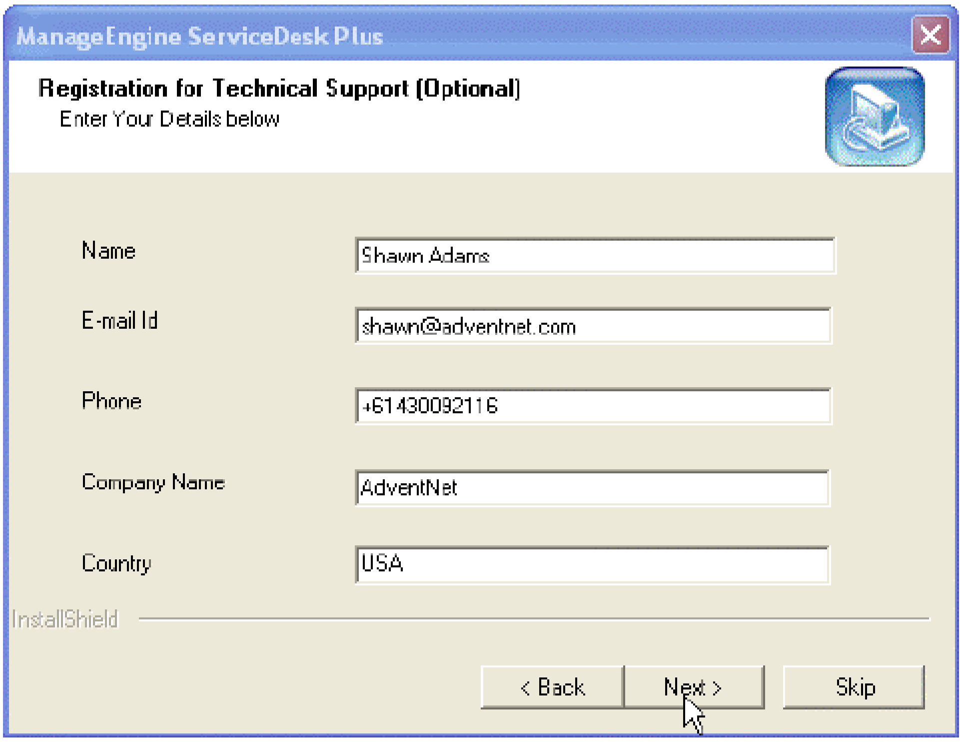
7. Choose the Database between MY SQL and MS SQL. By default ServiceDesk Plus supports **My SQL database,** to switch over to **MS SQL database** you need to configure SQL server to establish connection and start the server. Enter the details as given below,

    - **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. Click **Next**.

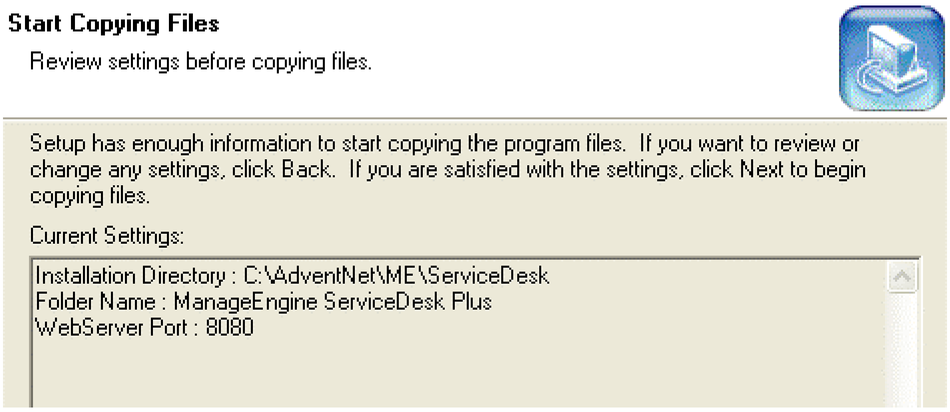
**Note:** To switch over to SQL database, you need to enable SQL authentication as Window authentication will not work.




11. The **Registration for Technical Support** form is displayed. This is an optional form and it 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**. Click **Next**.

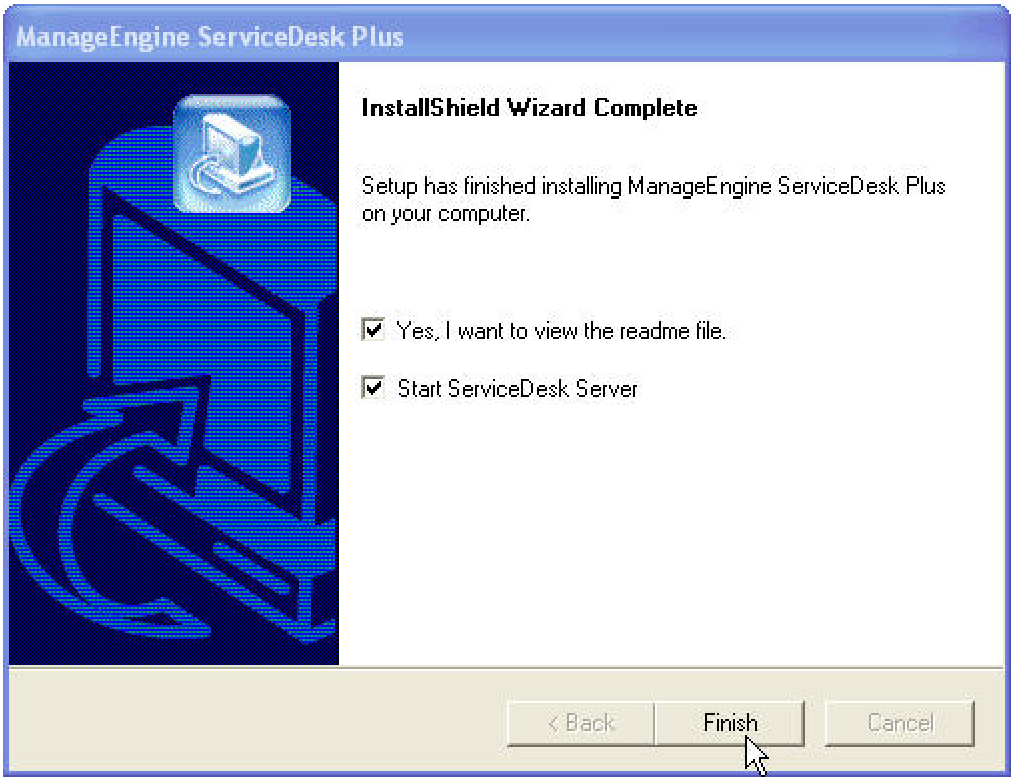



13. The details that you have provided till now will be displayed as below for your confirmation:
    ***Installation Directory : C:\AdventNet\ME\ServiceDesk***
    ***Folder Name : ManageEngine ServiceDesk Plus***
    ***WebServer Port : 8080***




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.

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




If you choose to start the ServiceDesk as Service, then 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 -> 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 -> 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 -> 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

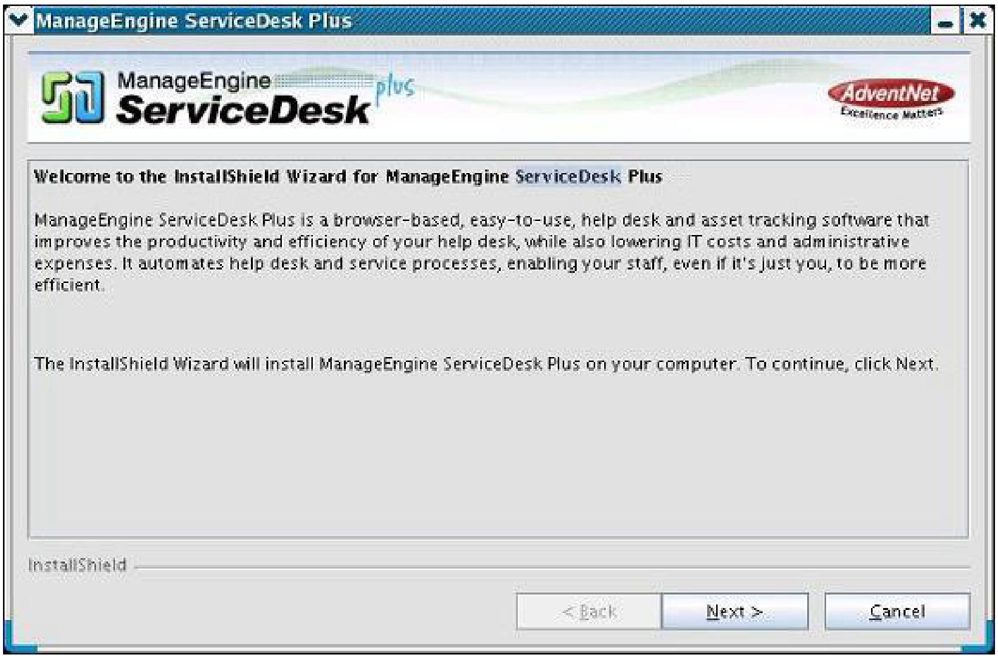
Follow the steps given below to install and setup the ManageEngine ServiceDesk Plus application:

1. Download the **ManageEngine_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. Click **Yes** to accept.
6. On accepting the license agreement, the installation wizard provides you with the option to choose between the **Standard**, **Professional** and the **Enterprise Edition**.

   **Standard Edition -** This edition offers helpdesk management, self-service portal, knowledge base, SLA management and helpdesk report to help you manage and track your requests.
   **Professional Edition -** This edition offers Software compliance & license tracking, Product Catalog, NMS integration, Asset Reports and few other asset related process along with the features of Standard Edition.
   **Enterprise Edition -** This is an ITIL ready Helpdesk. It includes all features of Professional Edition plus Incident managment, Problem management, Change management & Configuration management database(CMDB).

   A trial and free version is provided for Standard and Professional Edition. The **Free Version** never expires and is restricted to a single technician login with 25 nodes. The **Trial Version** is valid only for 30 days and allows 2 technician logins with 200 nodes. The Enterprise Edition is provided only with a trial version which is valid for 30 days with 5 technician logins with 200 nodes.

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**.

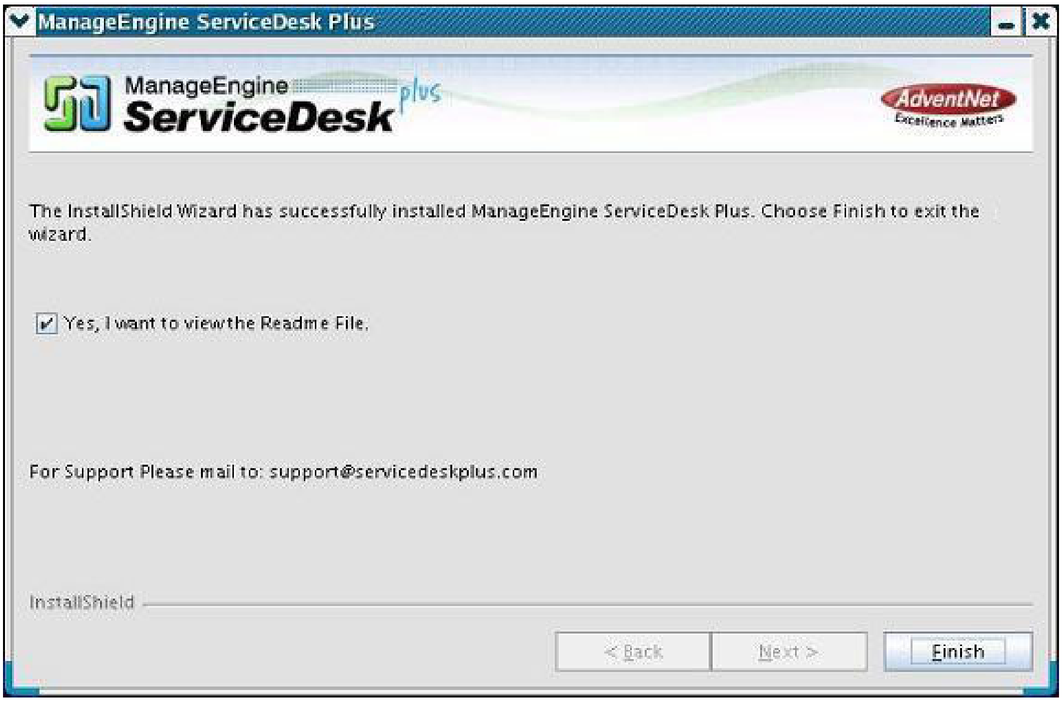
**Note:** If you wish to provide a port number lesser than 1024 as the web server port, then you need to be the super-user of the system to successfully install and run ServiceDesk Plus application.

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**. Click **Next**.
11. The details that you have provided till now will be displayed as below for your confirmation:

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

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

12. 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.

13. 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'.

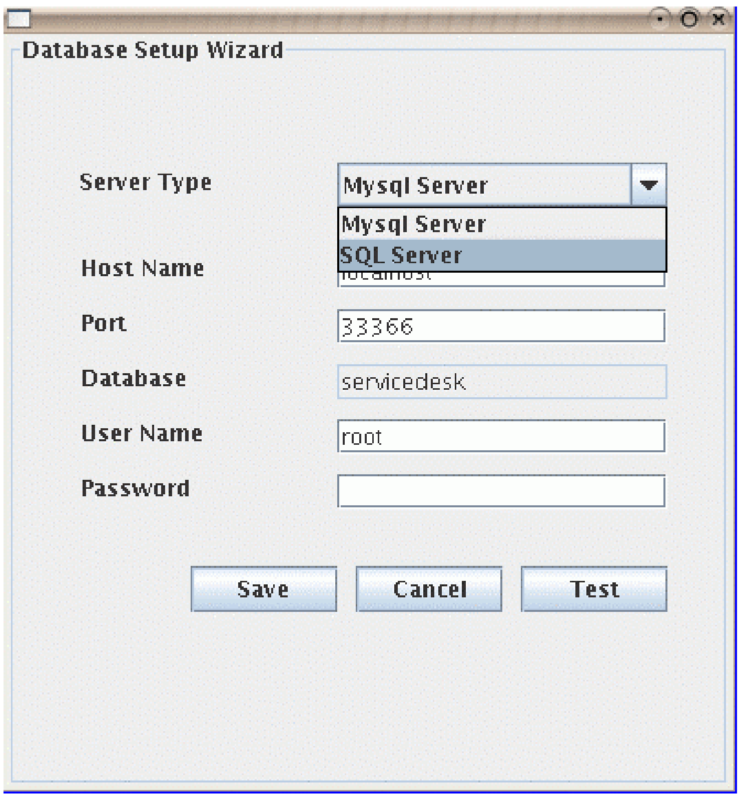
   **Port:** Specify the port in the given text field. The default value is 1433.

   **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

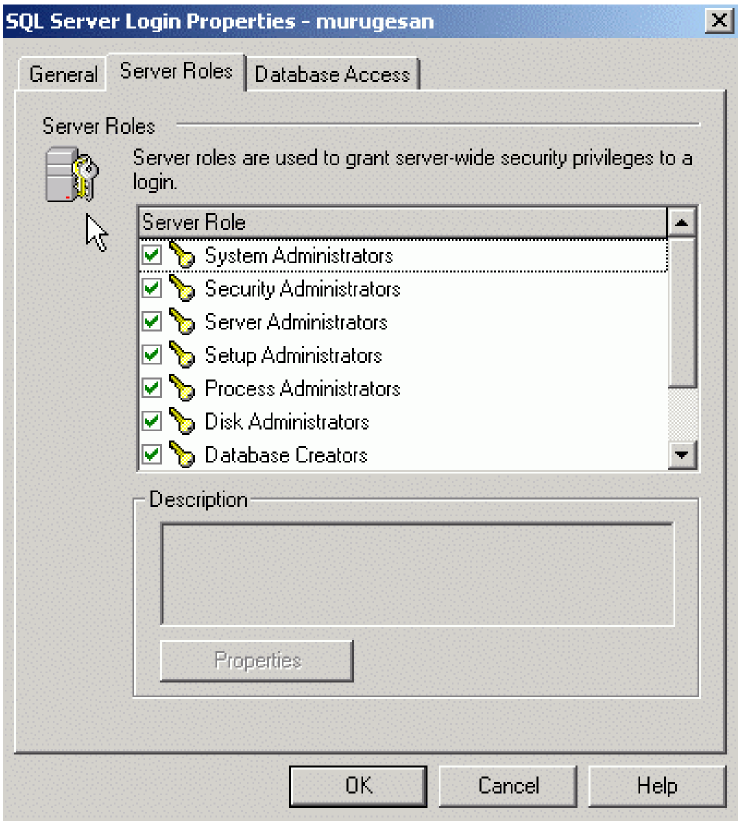
Verify the following,

- 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.

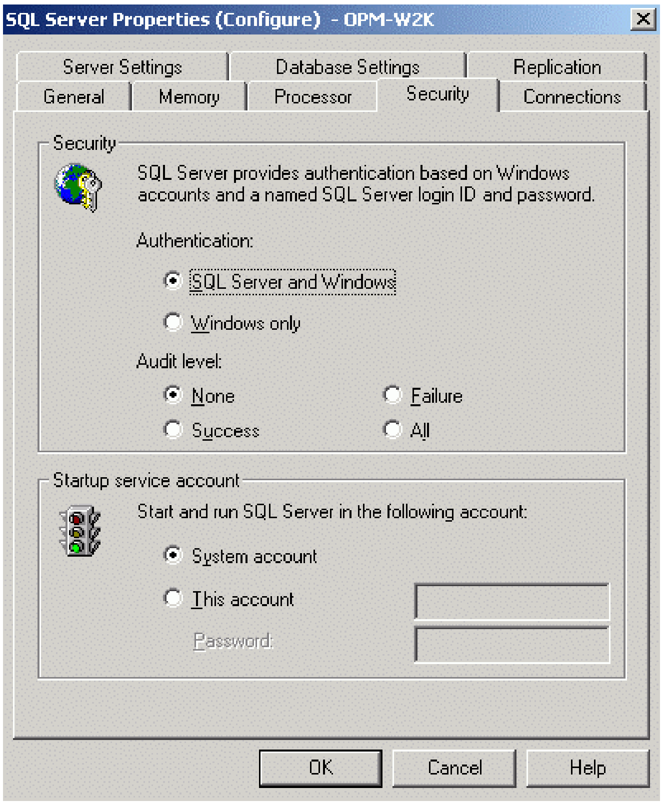
### MS SQL Connection Resolution

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

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.<br>4900 Hopyard Rd., Ste 310<br>Pleasanton, CA 94588, USA<br>Phone: +1-925-924-9500<br>Fax: +1-925-924-9600<br>E-mail: info@adventnet.com |
| AdventNet Development Center | AdventNet Development Centre (I) Private Limited<br>11 Sarathy Nagar,<br>Vijayanagar,<br>Velachery, Chennai 600 042 INDIA<br>Phone: +91-44-22431115 (10 lines)<br>Fax: +91-44-22435327<br>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 servicedeskplus-support@manageengine.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.

# Login Home page

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

1. My View, Global View, Assets View. Click the link for more information.
2. Scheduler. Click the link for more information.
3. License Expiry. Click the link for more information.
4. Reminders. Click the link for more information.
5. My Tasks. Click the link for more information.
6. Announcements. Click the link for more information.
7. **Get Quote:** This Get Quote link will not be available for the registered users (licensed users). This will be available only for the Demo users or the Trial version users.

   By filling in the specifications in the get quote form will help us to provide you the exact details of your requirements.
   1. Click on the **Get Quote** link on the top right hand side of the page. The page refreshes to open the Get Quote form.
   2. Specify the details and **Submit** the form. You will be contacted by our sales team on receiving a mail.
8. Quick Create /Search Items /Recent Items.

**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. For more information refer Creating a New Request

**Search Items**

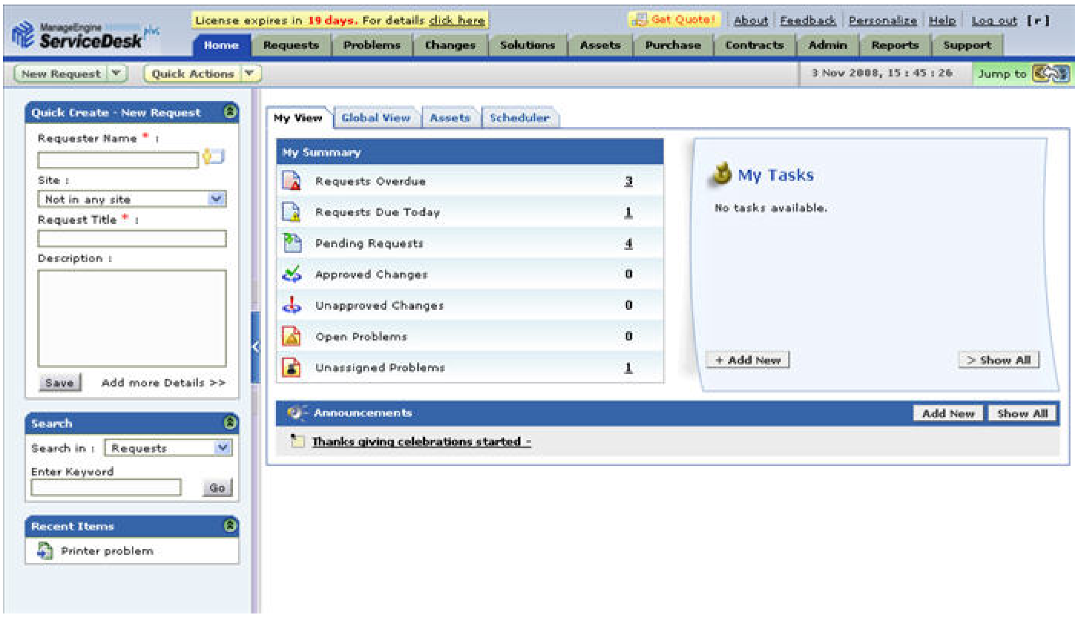
You can search items by selecting the **Search in** name from the combo box and by specifying the relevant **Keyword** in the given text field.

Click **Go** to search for the specified details.

**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.

Other than this you have Feedback, Personalize on the top right hand side of the page. Click the link for more information.


License expires in 19 days. For details click here
Get Quote!
About
Feedback
Personalize
Help
Log out
Home
Requests
Problems
Changes
Solutions
Assets
Purchase
Contracts
Admin
Reports
Support
New Request
Quick Actions
3 Nov 2008, 15 : 45 : 26
Jump to
Quick Create - New Request
Requester Name * :
Site :
Not in any site
Request Title * :
Description :
Save
Add more Details >>
Search
Search in : Requests
Enter Keyword
Go
Recent Items
Printer problem
My View
Global View
Assets
Scheduler
My Summary
Requests Overdue 3
Requests Due Today 1
Pending Requests 4
Approved Changes 0
Unapproved Changes 0
Open Problems 0
Unassigned Problems 1
My Tasks
No tasks available.
+ Add New
> Show All
Announcements
Add New
Show All
Thanks giving celebrations started -

# Views (My View, Global, Assets)

## My View

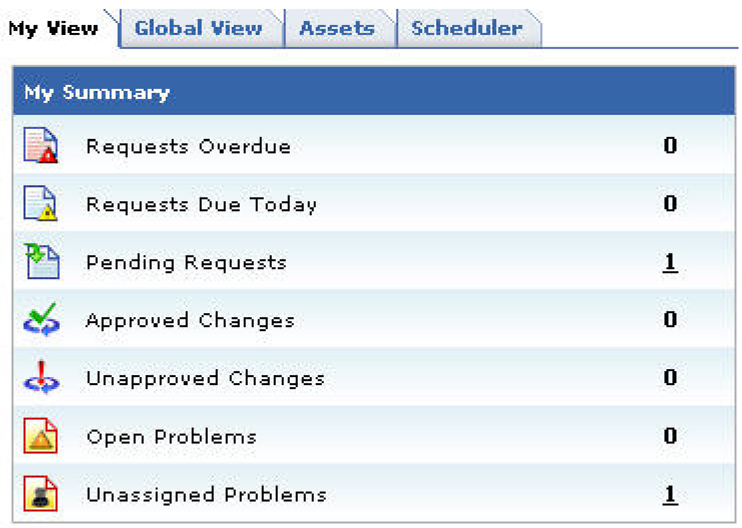
ServiceDesk Plus login home displays **My View** page with information on the request summary of the requests assigned to the user who has logged in. In the case of requesters, **My View** displays information regarding the requests that have been raised by them. For more information on the requester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

My View page also displays My Tasks and Announcements. Click the link for more information.

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

1. Number of requests assigned to the logged in technician that are overdue.
2. Number of requests assigned to the logged in technician that are due for that day.
3. Number of pending requests that are assigned to him/her.
4. Number of changes assigned to the logged in technician that are approved.
5. Number of changes assigned to the logged in technician that are unapproved.
6. Number of Open problems assigned to the logged in technician.
7. Number of problems that are unassigned to technicians.

Clicking the links to open the corresponding list view.




## Global View

Global view is available depending on the login authorization permissions ( administrator, site administrator ) 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:

- **Requests by** block displays the **Open, On Hold** and **OverDue** status of the Requests by **Technicians, Category, Level, Priority and Mode** in **All sites, not in any site** and the **sites configured** under the admin tab. These options should be selected from the drop down combo box. The matrix displays the seven technicians/category/level/priority/mode with the most number of requests assigned. If count increases more than seven then a **View All** button appears. If you wish to view all the technicians then click **View All** button.

  **Example:** On selecting the **Site** and **Technician** from the combo box, all the available technicians name getting listed one after the other in the block. Against each the technicians name you can see the number of Open, On Hold, and Over Due requests they have. Also it gives the total of all the open, on hold and overdue requests finally.

  To view the all the open requests on your name, click the number specified under the open request title. This will open the list of all the open requests on your name.

- **Request Summary** block, shows the graph of requests count that have come in during a specific time period such as, This Week, Last Week, This Month and Last Month requests in a site. You can select these options and the site from the combo box provided at the corner of the block.
- **Change by Type** block displays all the approved changes in a pie chart. These approved changes are displayed based on the type, priority, urgency and impact which should be selected from the combo box. To view the approved change for a specific time period such as This week, next week, this month, next month, next 7 days, next 15 days or next 30 days select any of these options from the combo box.

  You can have a pictorial representation of the approved changes by viewing the change by block.

- **Approved Changes** block lists all the changes approved by the Change Manager for a specific time period. This block displays the title and type of the approved changes. The approved changes are listed in descending order based on the scheduled start time.

  This block displays the list of all the approved changes. Where as Change by Type block displays the pictorial view of the approved changes.

  To view the change details, click on the title of the change to be viewed. This opens the Change Details page as shown below.

- **Unapproved Changes** block displays all the unapproved changes with the change title and type. The changes are displayed based ascending order. Click on the title of the change to view the change details.
- **Problem by Type** block displays the pictorial view of the problem based on the type, priority, urgency and impact which should be selected from the combo box.

## Asset View

The asset dashboard can be viewed by the technicians with view permissions on asset module while defining the roles.

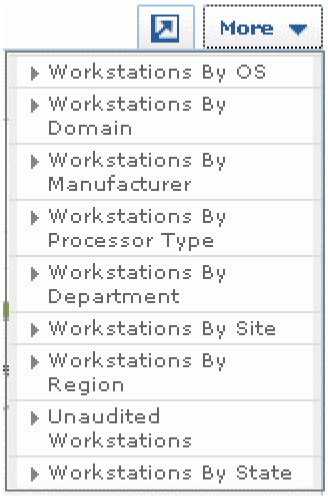

### All my Assets

- On scanning, all the IT & Non-IT assets in the organization are listed below in **All my Assets** .
- This displays each product type count across organization (Workstation, scanner etc.).
- Click **More** link  and select the options to view the graph of resources by site or region or state or asset summary.

- This also displays number of failed workstations on scanning at the bottom of the section. Click the **Troubleshoot** link for troubleshooting tips.

### Workstations

- On scanning, **Workstations** shows the graph of Workstations by os, domain, manufacturer, processor type, department, site, region, state etc.
- Click the **More** link and select the option to view the graph.




**Software**

- On scanning Software shows the graph of Software by category, software licensing status, software license compliance, software vendors volume etc.
- Click **More** link at the right side of the section and select the options to view the graph.


**Purchase & Contracts**

The purchase and contract dashboard can be viewed by the technicians with viewing permissions on purchase and contract module.

- On scanning, PO & Contracts shows the graph of contract summary and purchase order summary.
- Click **More** link  and select the option to view the graph.

- Contracts summary shows the graph for contracts expiring in next 7days, 30 days, also contracts expired in last 30 days.
- Purchase Order summary shows the graph for purchase due today, next 7 days & next 30 days.

# Scheduler

ServiceDesk Plus gives the provision of providing a schedule calender showing the number of open requests, problems, changes, task and reminder for a technician in a given month. The availability of a technician can be viewed from the technician availability chart, depending on which, the task, requests, problems and change can be re-assigned to other technicians.

The following are available under Scheduler,

- My Schedule
- Technician Availability Chart
- Mark Unavailability

# My Schedule

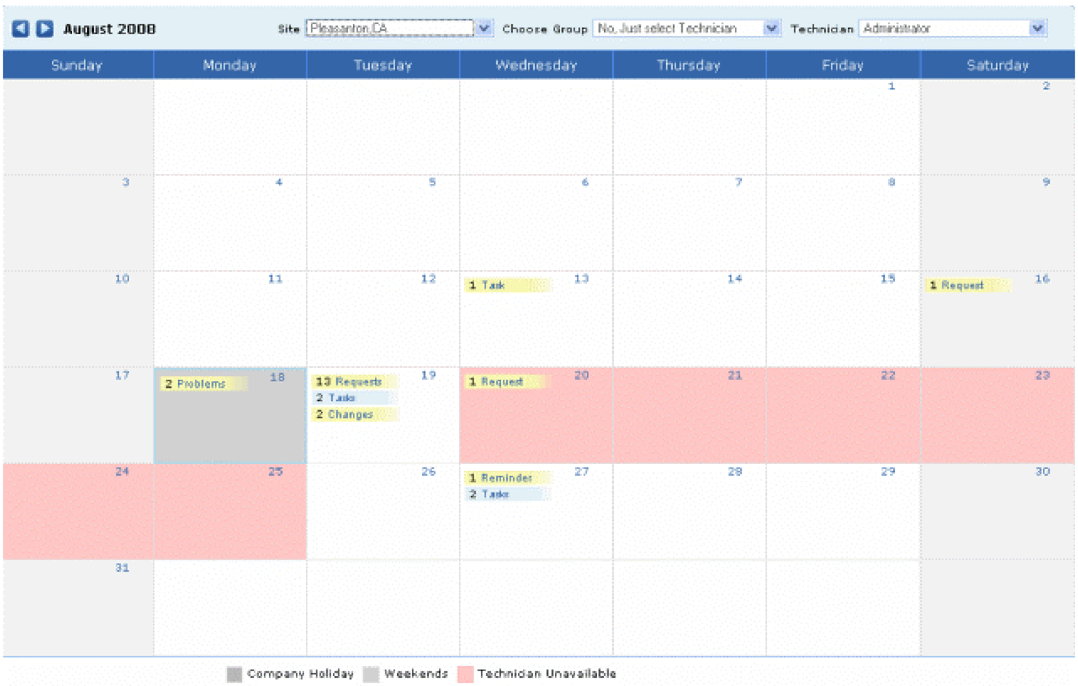
My Schedule is a calender view displaying the number of open requests, problems, changes, tasks and reminders assigned to a technician for a given month. The calender also shows the availability of the technician for a specific day in a given month.

**Note**: The My Schedule calender can be viewed by All Technicians.

- The **administrator** has the ability to view the number of open requests/ tasks/ problems / changes and availability of **All Technicians** in All Site.
- The **Site Admin** has the privilege to view the number of open requests/tasks/problems/changes and availability of technicians only in his site.
- The Technician can view only his open requests/ tasks/ problems/ changes and availability.

To view the My Schedule calender,

1. Login to ServiceDesk Plus application using your username and password.
2. In the home page, click **Scheduler** tab beside My View tab (OR) Click **Quick Actions** -> **My Schedule** under the schedule block. This opens the **Schedule Calender**. By default, the calender shows the number of open requests, problems, changes, tasks and reminders assigned to you as shown below,



Schedule Calender

- The Schedule Calender shows the **current month** and **year** along with the navigation buttons on the left hand side of the page.
- The **Navigation buttons** helps to navigate to the previous and the forth coming months.
- The current date is marked in separate border.
- **For an administrator** all the sites should be listed along with its corresponding groups and technicians loaded in the drop down field.
  **For a Site Admin**, the site for which he is the administrator gets listed in the drop down box along with its corresponding groups and technicians.
  **Technician** can view only his open requests, problems, changes, tasks and reminders.
- The **number of Open Requests, problems, changes and task** assigned to the technicians for a specific date in a given month can be viewed.
- The unavailability of the technician is indicated in a different colour.
- The company holidays and weekends is marked in a separate.

---

Using My Schedule, you can perform actions such as,

- Mark Leave
- Edit/Cancel Leave
- Add Task
- Add Reminders
- Viewing requests/task/problems/change
- Re-assigning requests/task/problem/change

---

## Mark Leave

It is essential to keep a track of technicians on leave so that work is not assigned to them for that particular day. To mark leave,

1. From My Schedule, hover over the day on which you want to mark leave. The list of icons gets displayed on the right hand side below the date. Click **Mark Leave** icon. This opens the **Mark Unavailability** pop-up window as shown below,

2. The name of the **Technician** is displayed in non-editable text.
3. Select the **Leave Type** from the combo box. For ex. Casual Leave, Sick Leave etc.
4. Select the **From** and **To** date of leave from the calender icon.
5. Specify any relevant **Comments** regarding the leave.
6. Click **Save**. The technicians holiday is indicated in a different colour.

Leave can be marked to other technicians using Technician Availability Chart. You can configure your leave by clicking **Quick Actions** -> **Mark Unavailability** under the scheduler block. This opens the Mark Unavailability pop up window. Follow the above steps to mark leave.

## Edit/Cancel Leave

If you wish to edit or cancel a leave then,

1. From the schedule calender, hover over on the day the technician is on leave. Click on the **Edit leave** icon on the right hand side below the date. This opens the **Mark Unavailability** pop-up window.
2. Click **Save** on making the changes.
3. If you wish to Cancel the leave then click **Cancel Leave**. The leave gets cancelled. **Note**: For continuous holidays, the entire series gets cancelled.

## Add Task

You can also add, view and re-assign the tasks to other technicians. The tasks can be added to technicians for the current day and the forth coming days. To add task refer Add Tasks.

## Viewing Requests/Tasks/Problems/Changes

The number open requests, tasks, problems and changes assigned to you gets listed in the calender, by default. To view the details of the request/tasks/problem/change,

1. Click the link corresponding to the requests/task/problems/changes to be viewed for a specific day. The details of requests/tasks/problems/changes gets listed for the particular day as shown below,


| Title | Status | Priority |
|---|---|---|
| New employee joining the organization | Open | Low |
| Unable to fetch mails | Open | High |
| Printer problem | Open | Medium |
| replacement of mouse | Open | N/A |

## Re-assigning Requests/ Tasks/ Problems/ Changes

The requests, tasks, problems or changes assigned to a particular technician can be re-assigned to other technicians. For ex. If requests are assigned to a technician for a specific day and if the technician is unavailable on that day, then the request can be re-assigned to other technicians. Similarly tasks, problems and changes can be re-assigned.

To re-assign requests/tasks/problems/changes,

1. Click the requests/problems/tasks/changes on the day, of the corresponding technician you want to re-assign from the Schedule Calender. This lists out all the open request for that day.
2. Enable the check box adjacent to the request which you want to re-assign.
3. Select the technician from the combo box to whom the task is re-assigned. Click **Re-assign** button. The task is re-assigned to the technician.

## Reminders

The reminder option is available only for the logged in technician, that is, if the logged in technician is an administrator then the reminders of other technicians cannot be viewed by him. To know more on reminders refer Reminders.

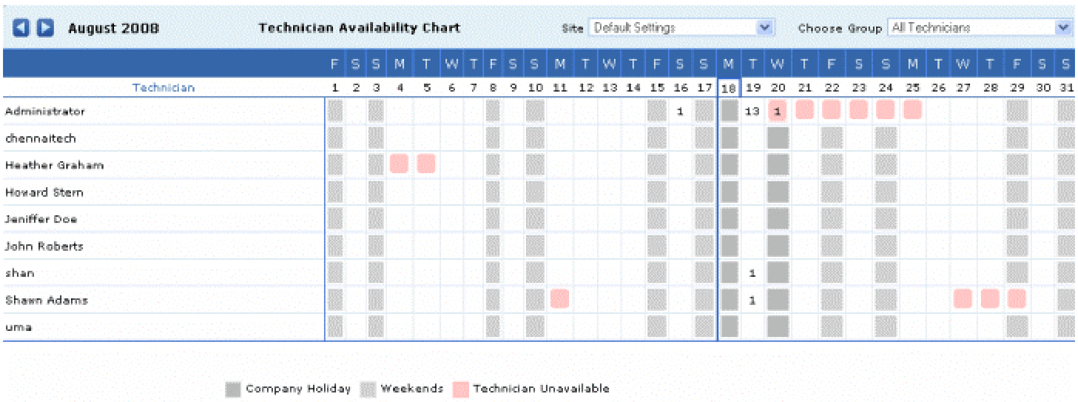
# Technician Availability Chart

The Technician Availability Chart displays the list of technicians, along with the number of open requests assigned to them and their availability for a given month. The chart is a matrix view, indicating the availability of the technician for a specific day, so that any request due on that day can be re-assigned to other technicians.

| | |
|---|---|
| | **Note**: The Technician Availability Chart is available only for technicians with Admin privileges such as an administrator and Site Admin.<br>• The **administrator** has the ability to view the availability and the number of open requests assigned to **All Technicians** in All Site.<br>• The **Site Admin** has the privilege to view the availability and the number of open requests of technicians only in his site. |

To view the Technician Availability Chart,

1. Login to ServiceDesk Plus application using the username and password.
2. In the home page, click **Scheduler** tab. This opens the **Schedule Calender** displaying the number of open requests, problems, changes, task and reminders assigned to you. Click the **Tech Availability Chart** link on the right hand side of the page. (OR)
   Click **Quick Actions** under the header pane -> **Tech Availability Chart** under Scheduler block. This opens the Technician Availability Chart. By default, the list of all the technicians gets listed as shown below,




Technician Availability Chart

- The Technician Availability Chart shows the **current month** and **year** along with the navigation buttons on the left hand side of the page.
- The **Navigation buttons** help to navigate to the previous and the forth coming months.
- The current date is marked in separate border.
- **For an administrator,** the list of all the technicians gets displayed irrespective of the Site and Group, by default. Hence the Site along with the group can be chosen from the combo box to view the availability of a technician in specific site.
  **For a Site Admin,** the technicians available in his site gets listed irrespective of the group.

- The **number of Open Requests** assigned to the technicians for a specific date can be viewed.
- The unavailability of the technician is indicated in a different colour.
- The company holidays and weekends is marked in a separate colours.

---

Using the Technician Availability Chart, you can perform actions such as,

- Mark Leave
- Edit/Cancel Leave
- View Request
- Re-assign Requests

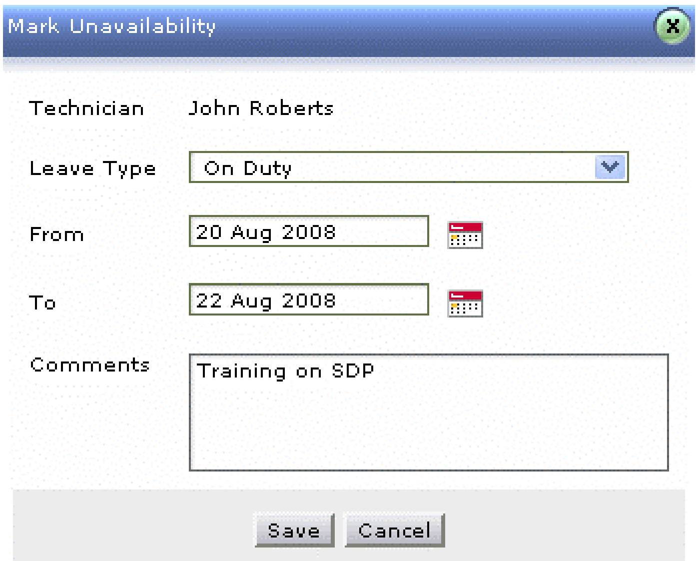
---

## Mark Leave

You can mark the unavailability of a technician using the technician availability chart. This is essential so that work is not assigned to the particular technician for that day and can be re-assigned to other technicians.

To mark leave,

1. From the **Technician Availability Chart** click the day corresponding to the technician on leave. This opens the **Mark Unavailability** pop-up window as shown below,




2. The name of the **Technician** is displayed in a non-editable text.
3. Select the **Leave Type** from the combo box. For ex. Casual Leave, Sick Leave etc.
4. Select the **From** and **To** date of leave by invoking the calender icon.
5. Specify any relevant **Comments** regarding the leave.
6. Click **Save**. The technicians holiday is indicated in a different colour.

You can configure your leave by clicking **Quick Actions** -> **Mark Unavailability** under the scheduler block. This opens the Mark Unavailability pop up window.  Follow the above steps to mark leave.

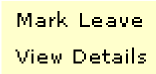
## Edit / Cancel Leave

If you wish to edit or cancel a leave then,

1. Click on the leave of the technician which you want to edit from the Technician Availability Chart. This opens the **Mark Unavailability** pop-up window.
2. Click **Save** on making the changes.
3. If you wish to Cancel the leave then click **Cancel Leave**. The leave gets cancelled.
   **Note**: For continuous holidays, the entire series gets cancelled.

## Viewing Requests

The requests assigned to a technician for a particular can be viewed by,

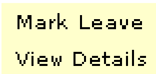
1. Click on the day of the requests, of the corresponding technician which you want to view from the Technician Availability Chart.
2. From the drop down box, 

   select **View Details**. This opens the list of all open request due for that day.

## Re-assigning Requests

The request assigned to a particular technician can be re-assigned to other technicians. For ex. If requests are assigned to a technician for a specific day and if the technician is unavailable on that day, then the request can be re-assigned to other technicians.

To re-assign requests,

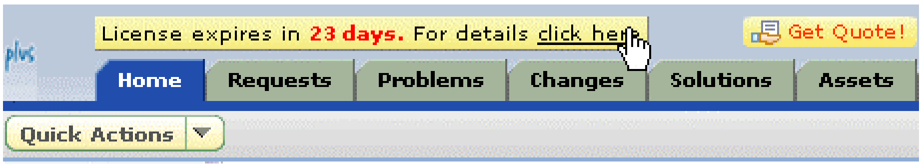
1. Click on the day of the requests, of the corresponding technician you want to re-assign from the Technician Availability Chart.
2. From the drop down box, 

   select **View Details**. This opens the list of all open request due for that day.
3. Enable the check box beside the request which you wan to re-assign.
4. Select the **Technician** from the combo box to whom the request is re-assigned.
5. Click the **Re-assign** button.

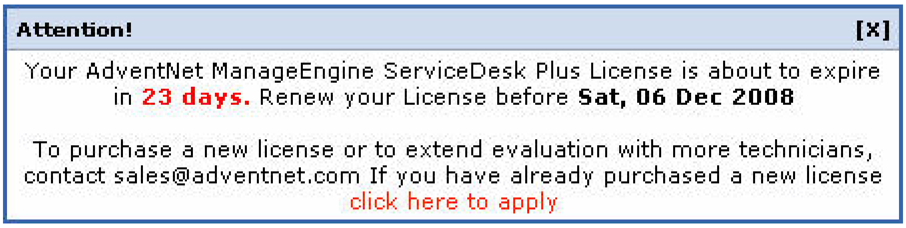
Click the name of the technician to have a detailed view about the number of requests, problems, changes and tasks assigned to the particular technician in My Schedule.

# License Expiry Alert

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




Click on **click here** link to view the licence expiry alert. 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 as shown below,




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 Tasks

My Tasks on the right hand side of the home page -> under my view tab-> next to the my requests summary block, shows all the **Tasks** assigned to you. These tasks could be added by you as a personal reminder of the due by tasks. Or it can be the tasks assigned to you by other technicians.

You can also assign tasks to other technicians through this option. On adding the tasks to other technicians, the added tasks will be listed in their home page under the My Tasks block and the technicians will be able to view the tasks immediately on logging in to ServiceDesk Plus application.

All your tasks including the requests assigned on your name can be added to this list as **My Tasks**, but you cannot maintain the log for the requests entered under my tasks list.

## To add My Tasks,

From the ServiceDesk Plus login home page, you have **My Tasks** block on the right hand side of the home page. Click the Add New button at the down left corner of the My Tasks block. This opens the **Tasks** page. Alternatively, you can also add tasks by clicking 

-> **Add Task** under the Task block.

1. Specify the **Title** of the task in the given text field. This is a mandatory field.
2. Specify relevant information about the tasks in the **Description** field.
3. Select the **Scheduled Start Time** from the calendar button. Also select the **Scheduled End Time** for the task from the calendar button.
4. The **Actual Start Time** and **End Time** of the task will be entered by the technician doing (owning) the task.
5. The actual start time and end time is the real time schedule of the task. The scheduled start time and end time specified by the task owner is a tentative time schedule.
6. Select the **Owner (technician)** of the task from the combo box.
7. Specify the **Status** of the task. By default the **Status** of the task is **Open**.
8. Specify any relevant comment about the task in the **Comments** field.
9. If you wish to be reminded of the task previously then select the **Email me before** option and select the number of days from the combo box. This option will be selected based on the scheduled start time.
10. **Save** the values. You can see the added tasks getting listed under My Tasks block in the home page as shown below. The tasks will be listed under the tasks tab in ascending order based on the scheduled start time.

To view the details of the tasks click the title of the task to be viewed. This opens the Tasks page and you can view the details.

When you have completed the task, you can just close the task by selecting the radio button beside the task. Alternatively,

1. Click the **Show All** link on the right hand side of the block. This opens the **Show all Tasks** page.
2. Select the tasks which has been completed by enabling the check box.
3. Click the **Close** button to close the task. You can see the tasks moved under closed status and in the home page you can see the tasks deleted from the My task block.

## To view all the added Tasks,

To view all the tasks added to the list, click the **>Show All** button on the down right hand side of the My Tasks block. This opens the **Show all Tasks** page as shown below,


| Title | Scheduled Start Time | Scheduled End Time | Module | Status | Assigned To | Created By | Link |
|---|---|---|---|---|---|---|---|
| Entry in Active directory | N/A | N/A | Request | Open | - | administrator | Request Id : 9 |
| Setting up email address | N/A | N/A | Request | Open | - | administrator | Request Id : 9 |
| Setting up user computer | N/A | N/A | Request | Open | - | administrator | Request Id : 9 |
| Setting up user location | N/A | N/A | Request | Open | - | administrator | Request Id : 9 |
| Routers Change | Oct 29, 2008 11:00 AM | Oct 30, 2008 11:00 AM | General | Open | administrator | administrator | |
| Network Change | Oct 30, 2008 11:00 AM | Nov 1, 2008 11:00 AM | General | Open | Jeniffer Doe | administrator | |

You can also add new task through this page by clicking on the **New Task** button available on the top right corner of the page.

To view the tasks based on the status-> click the **Filter Showing** combo box and select the task status from the list. You can see the tasks getting listed based on the selected status.

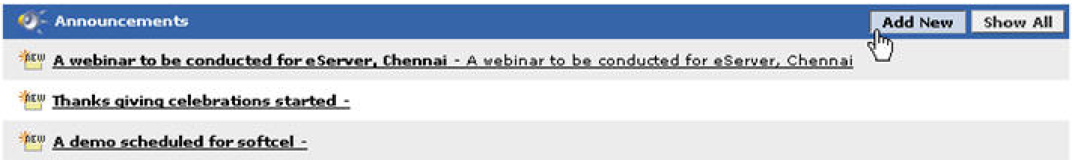
Alternatively, you can view **All tasks** and **tasks assigned to you** in **Quick Actions** under the Task block.

## To Delete Tasks

1. Click the **>Show All** button on the down right hand side of the My Tasks block. This opens the **Show all Tasks** page as shown above.
2. Click the **Delete** button. A confirmation message pops up asking you confirm on the delete process.
3. Click **Yes** to proceed. You can see the task deleted from the Show all Tasks list as well as from the home page.

# 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 page of the my view tab, below the My Summary block. Any technician can add, edit, and delete announcements.




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. This is mandatory field.
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 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.

# 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.

## Add Reminders

To add new reminders,

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click **Quick Actions** Quick Actions just below the header tabs -> **Add New** under the **Reminders** block. The Reminders form pops up.

   Alternatively, you can add a new reminder by clicking **Quick Actions** -> **My Reminder (s).** The **My Reminder (s)** form pops up as shown below,


   Click **+Add New** link at the bottom of the my reminders form. This opens Reminders page.

3. Enter the task summary in the text field provided.
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  5 min time interval.

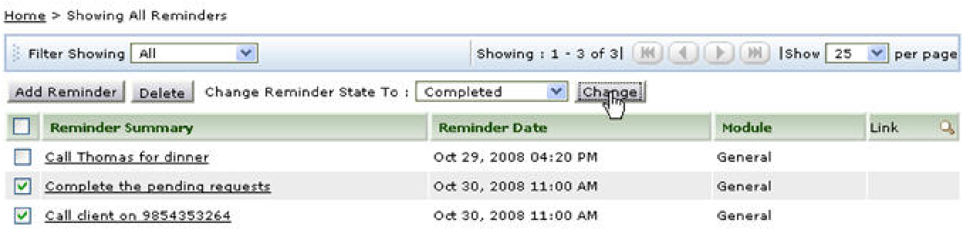
5. Click **Add**. The new reminder is added and is listed along with the already existing reminders in the ascending order based on date and time.

## Changing Status

When you have completed a reminder, you can just strike the reminder to indicate that it is completed by selecting the radio button beside the reminder.

1. From the **My Reminders** form, click the status radio button to change the task status from incomplete to **Completed**. The task is struck through to indicate that it is completed.


2. Alternatively, you can also change the task state by executing the following steps :
    1. Click **Show all** at the bottom right of the **My Reminders** pop up window. The **All Reminders** window opens as shown below,




    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.

## Deleting Reminders

The reminders can be deleted by,

1. From the **My Reminders** form, click **Delete this reminder** radio button available beside the status radio button. The reminder gets deleted from the list.
2. Alternatively, from **All Reminders** window, enable the check box beside the Reminder summary to be deleted. Click **Delete**. A pop up window confirming the delete operation appears. Click **Ok** to proceed. The reminder gets deleted from the list.

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

| | |
|---|---|
| | **Note:** The **Reminders** option is available under **Quick Actions** link for requesters accessing ServiceDesk Plus through Self-Service Portal, provided the option is enabled. |

# 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, phone call and so on. 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. This opens the 'Default Request' Template form,

   You can also create new requests quickly and easily through Quick Create and Change Template explained later in the page.

## Providing Request Details

1. In the default request form, select the **Request Type** from the combo box. The three default request types are,
   - **Incident :** Failure of a business service or degradation of a service for one or more users. E.g. Unable to print
   - **Service Request:** A standard request for some kind of service. E.g. Installing software, move from one place to another, reset password etc. A Service Request is not an Incident.
   - **Request For Information:** Request for information is basically in need of some information or knowledge.

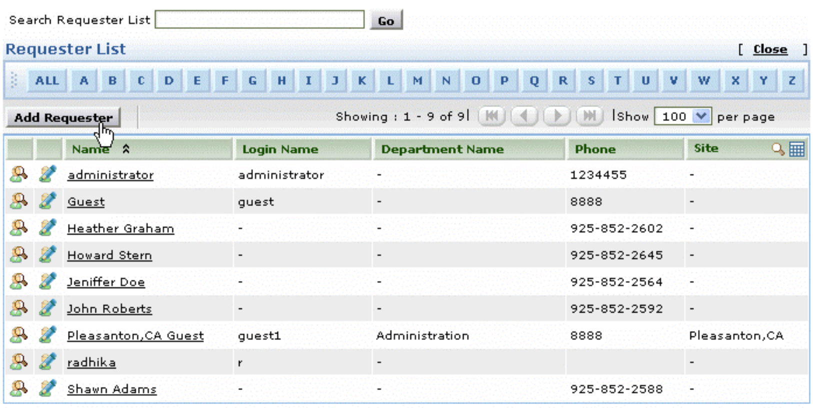
   The request type can be configured in Request Type under the Admin tab.

2. Select the Status of the request. The default entry of the **Status** of the request will be **Open.**
3. Select the **Mode** of request submission, request **Level and Priority** of the request from the combo box.
4. Select the **Impact, Impact Details and Urgency** of the request from the combo box.

## Selecting the Requester

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

5. In the **Requester Details** block of the **Request** form, beside the name field, click the requester lookup button ( ). The **Requester List** window pops up as shown below,



   1. From the above list of requesters, click the hyper-linked requester **Name** to choose the requester.
   2. 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**, **Site** and **Workstation,** then the relevant details will be populated in the respective fields.
   3. You can also add new requester directly by clicking the **Add Requester** button from the requester list page.
   4. 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.

6. By default, the location of the requester gets populated in the **Site** text field. The requester can raise a request from a one site to a problem in a different site. In this case the site needs to be selected from combo box by the technician handling the request.

## Assigning Request to Group/Technician

7. On selecting the site, the groups corresponding to the site gets populated under the Group field. The request is routed to the particular group by selecting the **Group** name from the combo box.
8. On selecting the Group , technicians associated with the Group alone will be listed in the Technician drop down list.  Select the **Technician** for the request from the combo box.

## Classifying Request Category

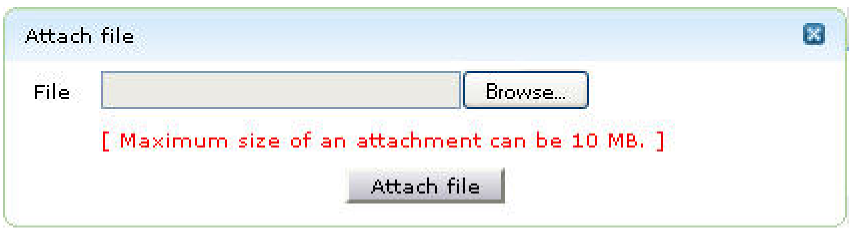
9. The request can be classified under various categories. Select the relevant category under which your request can be classified under the **Category** drop-down box.
10. Select the relevant **Sub-Category** from the combo box. Also select the relevant **Item** from the combo box.
11. Specify the subject 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

12. 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

13. In the Task Details block, below the Description text box, click the **Attach file** button beside the Attachments field to attach attachments. This opens an **Attach File** pop-up window as shown below,



1. Click the **Browse** button and select the file to be attached from the file chooser window and click the **Open** button.
2. Click the **Attach file** button. The selected file will be listed below the **Attachments** 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.

The attached documents can be indicated with an attachment icon beside the title of the request in the request list view page.

## 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,

13. Click the button beside **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. The resolution can be viewed by click the Resolution tab while viewing the request.

14. 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.

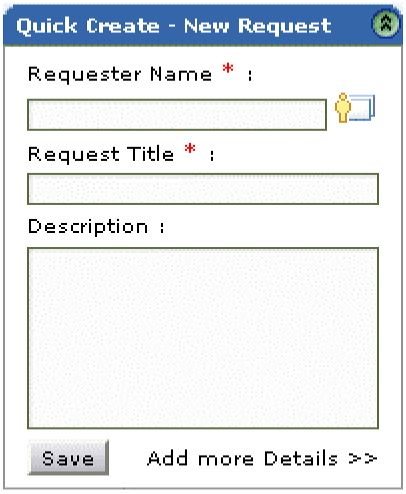
## Additional Request Details

You can define your own organization-specific fields that do not appear in the **New Request** form, from the **Admin** module. 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. The newly created fields needs to be configured in '**Default Request**' under Request Template.

## Quick Create

Quick Create is optional and can be enabled under Self Service Portal Settings. Using the **Quick Create - New Request** form, you can create a request instantly. 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.

## Change Template

A request can be created instantly using request template. The request form can be customised thereby creating individual request template for the most frequently raised requests.

Select any one the template relevant to the request from the **Change Template** combo box in the new request form. The default request is the default template in the new request form. 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.

## Modes of Creating a Request

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

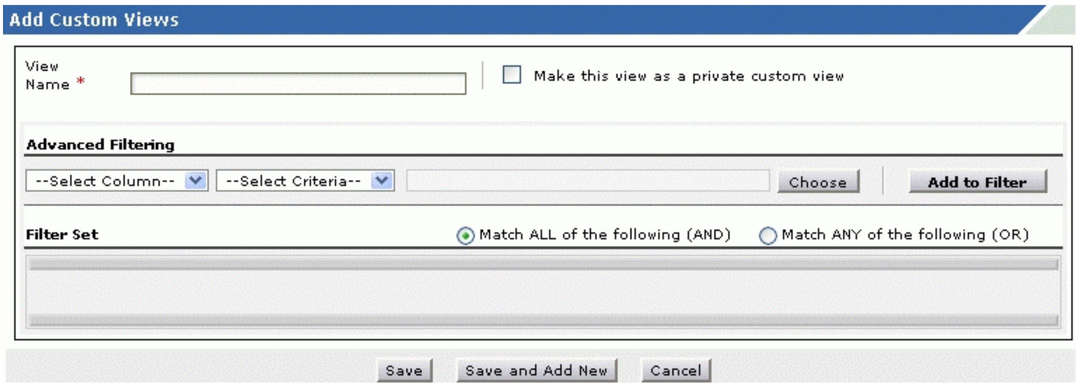
1. **E-mail** the request to the help desk team. This e-mail will be automatically converted to a new request in the ServiceDesk Plus application.
2. Call up the help desk agent and report an issue or explain the nature of your request. The help desk agent will manually feed in the details into the application 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.

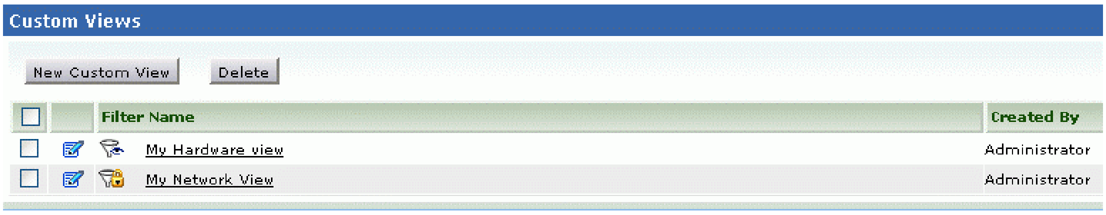
Custom views will be listed in the **Filter showing** combo box in the Requests home page at the top below the title. On clicking the combo box the views marked as private will be listed under **My View** list and the public views will be listed under **Requests** list.

## 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.




## 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**.

   From the request details page, you can navigate to the previous or the next request using the navigation buttons on the top right hand side corner. Using this, you need not return back to the list view page to view the next request.

In the request tab, the data is grouped in a logical manner. By default this page displays Subject of the request & **Description** of the request, **Request Details, Requester Details and Time Elasped. 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.

If the request is submitted for approval then the **Approvals** tab is viewed along with the Request, Resolution and the History tabs. The **Approval Status** is shown on the top right corner of the page below the Status and Priority. To know more refer Submit For Approval.

## 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.

| | |
|---|---|
| | **Note**: If any mail transactions/ threads has an attachment, then the same can be viewed under View Requester Conversation block. To know more refer Request Conversation. |

## 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.

**Asset belonging to the User,** while adding users to ServiceDesk Plus in the Admin tab, you have an option to **Associate Workstation** to the user. If you have associated workstation to the user, you can view the list of all associated workstations under this block.

## Cost of a Request

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

1. Click **Add Work Log** button. (OR)

   Alternatively, you can enter the time spend details for a request by clicking **Add Work Log** option under **Actions** combo box from the request details page. The Add Work Log dialog pops up with the subject and request id of the request mentioned.
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 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. Specify the **Executed Time** by invoking the calender icon.
7. If you wish you can enter a description for this time spent entry.
8. 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** button.
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. The status of the request can be modified while adding a resolution on selecting the status from **Change Status To** combo box.
5. 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 from the view list page. This opens the **View Request** page. Click the **Edit** tab on the top of the page to modify the request details. (OR)

   From the request list view page, click the edit icon beside the request to be edit. This opens the **Edit Request** form where you can add resolution while editing, change the status of the request from open to close, and so on.

   Alternatively, you also have an inline edit option to modify the request details in the view request page. Click the edit button beside each block which opens the request form fields in editable format. This comes in handy when you need to edit the values of the entire block say **Request Details** one by one.
   **Note** : While editing the request details block, the SLA, department and the template is in non editable mode. The SLA of the corresponding site selected on editing the request gets applied. The department of the corresponding technician selected on editing the request gets displayed.

4. On modifying the values, click **Update Request** to save the changes. If you do not want to save the changes, click **Cancel**.

## Editing more than one Requests

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

1. Select the check box beside the requests to be edited from the request list view page.
2. Click **Edit Request** 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. This opens the request list view page.
3. Click the **Subject** link of the request in the **Requests** list page.
4. Click the **Close** tab under the **Tasks** block. The **Close Request** dialog box appears. Enable the 'Yes' radio button if the resolution has been acknowledged. else enable 'No' radio button. Enter relevant **Comments** in the field provided. Click **Close** to close the request. If you do not wish to close the request then click **Cancel**. (OR)

   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 view 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. The **Close Request** dialog box appears. Enable the 'Yes' radio button if the resolution has been acknowledged. else enable 'No' radio button. Enter relevant **Comments** in the field provided. Click **Close** to close the request. If you do not wish to close the request then click **Cancel.**

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.

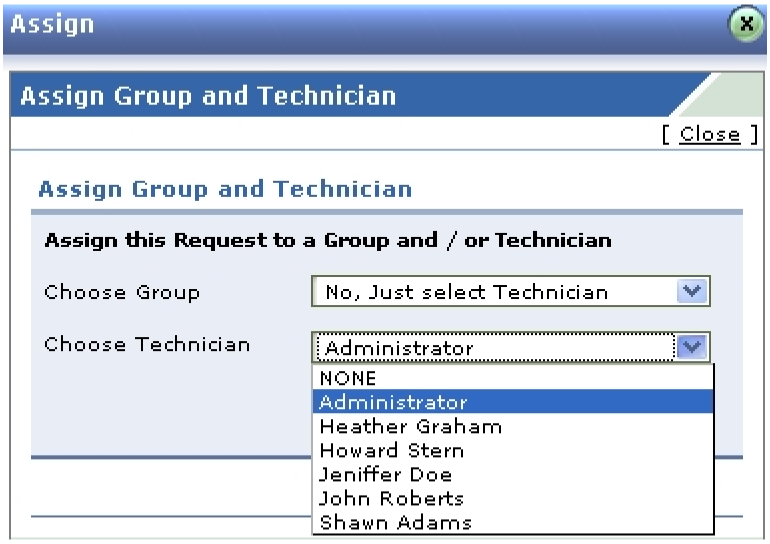
# Assigning a Technician for the Request

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

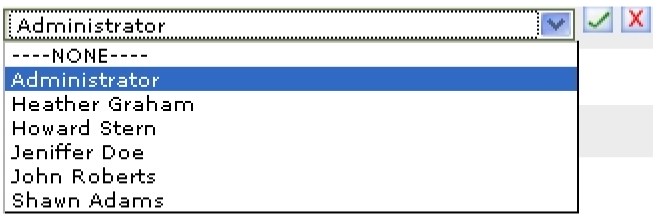
To assign a technician,

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.



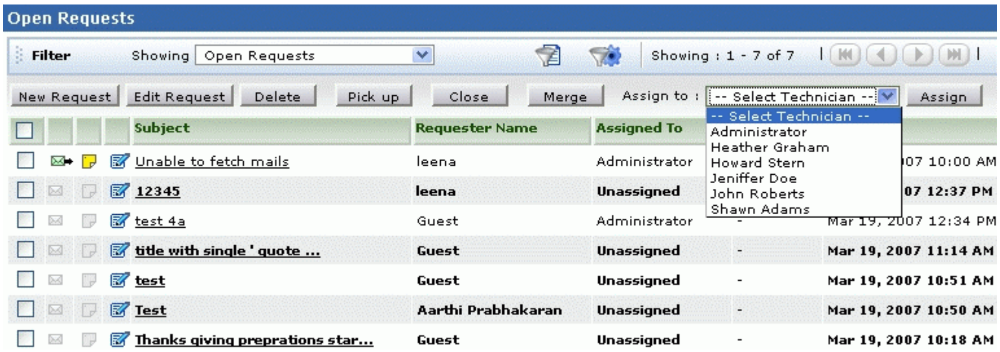

5. Alternatively, you can also assign technician using inline edit option. Click the technician name shown in the request details block. This opens the drop down box as shown below. Select the technician from the list and click the  icon to select the technician name else click cancel icon.



## Bulk assign requests to technicians

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

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.



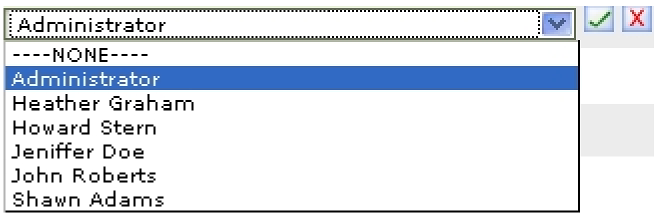

2. Select the **Assign to** check box. Select the technician from the drop down list.
3. Click **Assign** button to assign the technician**.**

# 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

If a technician is unable to close a request then, it could be for many reasons such as, lack of necessary information or and so on. If the technician is unable to continue the work then he/she can move the request to on hold status.

If this is not done, then the request will remain in open state idly which will lead to the violation of 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 technician (s) handling the request. To avoid all these, move the request to on hold state till the time you are ready to resume work on the same.

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. This opens the request list view page.
3. Click the **Subject** link of the request in the **Requests** list page.
4. Click the **Stop Timer** under **Actions** combo box. 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 status of the request will be changed to **On hold** and 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 Actions combo box. 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 status of the request will be changed to **Open** and the reason gets appended to the request history.

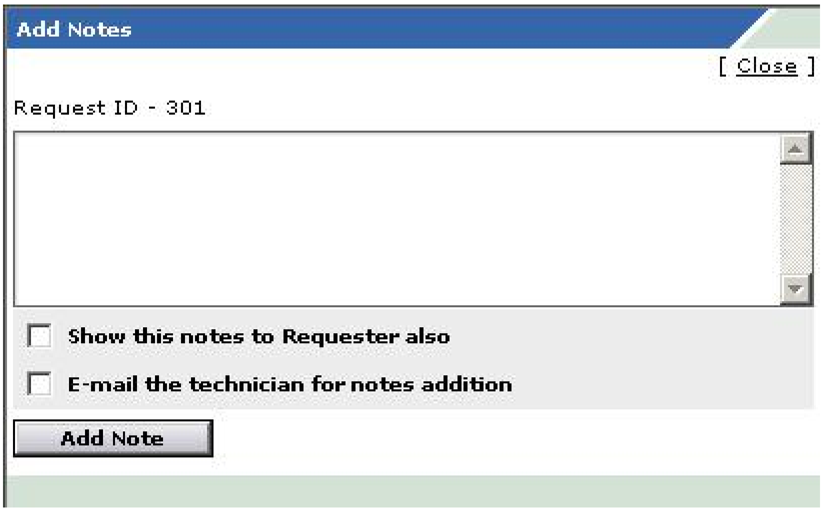
**Note:** You can stop and start timer for requests that are not overdue.

# 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 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,

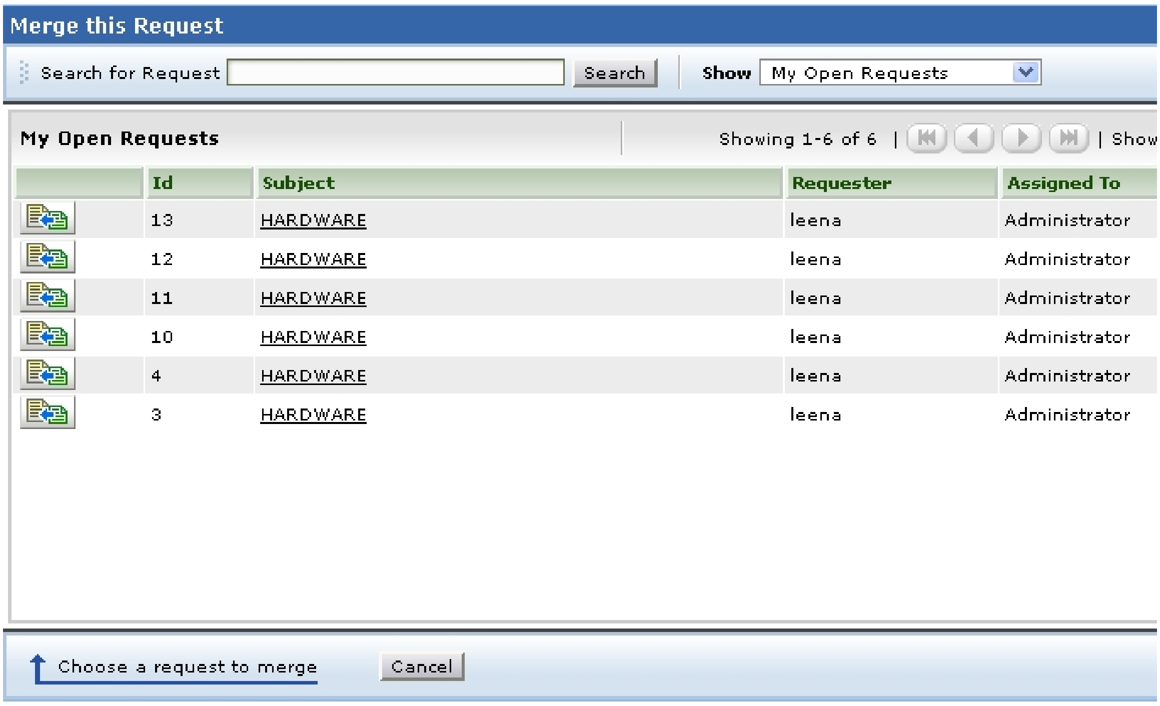
1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Request** tab in the header pane.
3. Click the **Title** of the request to which you would like to add tasks.
4. Click the **Actions** menu -> select **Add Tasks** option. This opens the **Tasks** window.
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.

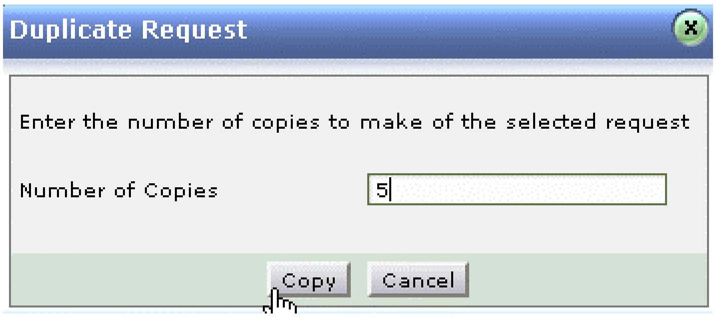
You can split a thread of a request into a new request. For more information on this, kindly refer to the section Request Conversations.

# 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 **Subject** link of the request that you want to duplicate in the view list page. This opens the Request details page.
4. Click **Duplicate Request** option under **Actions** combo box. A **Duplicate Request** pop-up window opens, requesting you to give the number of copies.




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

While copying the request, the **Notes, Tasks, Reminders, Resolution and Approval status** of 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. This opens the request list view page.
3. Click the **Subject** link of the request that you want to delete. This opens the request details page.
4. Click **Actions** combo box -> **Delete** option. A confirmation dialog pops up.
5. Click **OK** to proceed deleting. The notes, work logs and conversations ( if any ) added to the request gets deleted. 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 beside 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.

# Add / Associate Problem to Requests

You have an option to add, associate, view and detach problem to requests. Similar problem occurred to Incidents ( requests ) can be associated in order to track the problem occurred for the same request. You can also add new problem or detach the existing problem to a request. While adding/associating/detaching a problem the approval status of the request does not change.

- Associating Problem to request
- Add Problem to request
- Viewing Associated problem
- Detach Request from Problem

## Associate Problem to Request

You can also associate the existing problem to the request. To associate problem,

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 **Subject** link of the request for which you want to add a problem. This opens the request details page.
4. Click the **Actions** combo box on the top right side of the page. Click **Search Problems** option. This opens **Associate Incidents to problem** page as shown below,


4. Select the type of problem to be displayed by selecting from the **Filter Showing** combo box on the top left hand side of the page. Ex: Open Problems or All Problems and so on. On selecting the problem type the corresponding problems gets listed.
5. Select any one problem to be associated with the request by enabling the radio button beside the title of the problem.
6. Click **Associate** button to associate respective problem to the request (particular selected request). You can associate the same problem to different requests.

   Once the problem is associated to the request, the **View Problem** and **Detach from Problem** option appears under **Actions** combo box.

## Add Problem to requests

You can add new problem to requests. To add new problem,

1. From the request list view page, click the **Subject** link of the request for which you want to add a problem. This opens the request details page. Click New Problem button on the right hand side of description field. (OR)

Alternatively, you add a new change from the **Associate Problem to Incident** pop up page. Click **New Problem** button below the filter showing combo box. This opens the **New Problem** form.

2. The details such as Status, Impact, Urgency, Priority, Category, Sub category, Item along with Subject and Description remains the same as of the request. If required, you can modify the same on selecting from the combo box.
3. Select the **Reported By** requester from the list by clicking on the Requester icon. This opens the requester list page and click the requester title.
4. Select the **Technician** from the combo box.
5. Select the **Due by Date** and the **Closed Date** from the calender button.
6. Select the affected **IT Services** from the list by clicking on the icon. This opens the **Services Affected** pop up box. Select the affected IT services and **Save** the changes.
7. Select the Assets Involved with the problem by clicking the icon. This opens the **Select Assets** page. Select the **Type of Assets** or the category of assets to be involved from the combo box. Ex: Workstations, Routers, Switches and so on. Select the **Available Assets** under the selected type from the list and move to **Assets involved** using **>>** button. And **Save** the changes.
8. If you have any file attachments for the problem click the **Attach File** button and attach files. **Note:** Maximum size of an attachment can be 10MB.
9. **Save** the changes. A new problem gets added in the problem list view page.

## View Associated Problems

You have an option to view the newly added problems or the problems associated to the request.

To view the problem,

1. From the request list view page, click on the request for which you wish to view the problem. This opens the request details page.
2. Click **View Problem** button on the right hand side of the request description. (OR)

   Click **Actions** combo box -> **View Problem** option. This displays the Problems Details page of the problem added/associated to the request.

## Detach Request from Problem

If you want to add another problem to the request then the existing problem has to be detached.

To detach a problem,

1. From the request list view page, click the request you wish to detach the problem. This open the request details page.
2. Click **Actions** combo box -> **Detach from Problem** option. The request is detached from the problem.

# Add / Associate Change to Requests

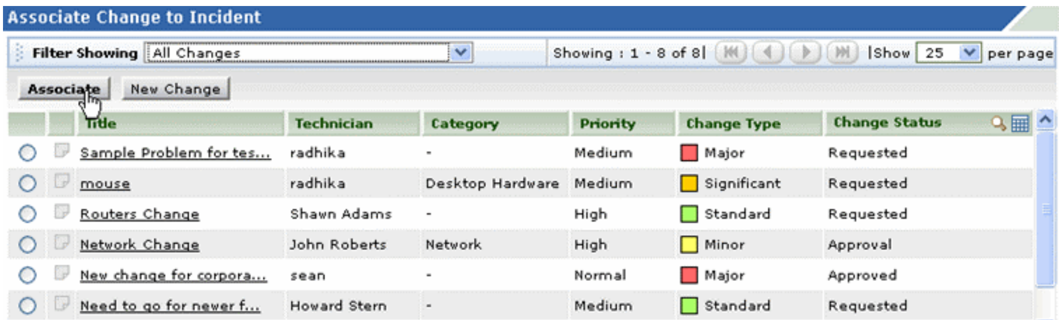
You have an option to add, associate, view and detach change to requests. Similar change occurred to Incidents ( requests ) can be associated in order to track the change occurred for the same request. You can also add new change or detach the existing change to a request. While adding/associating/detaching a change the approval status of the request does not change.



## Associate Change to Requests

You can also associate the existing change to the request. To associate change,

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 **Subject** link of the request for which you want to add a change. This opens the request details page.
4. Click the **Actions** combo box on the top right side of the page. Click **Search Changes** option. This opens **Associate Change to Incident** page as shown below,




5. Select the type of change to be displayed by selecting from the **Filter Showing** combo box on the top left hand side of the page. Ex: Open Change or All Change and so on. On selecting the change type the corresponding changes gets listed.
6. Select any one change to be associated with the request by enabling the radio button beside the title of the change.
7. Click **Associate** button to associate respective change to the request (particular selected request). You can associate the same change to different requests.

   Once the problem is associated to the request, the **View Change** and **Detach from Change** option appears under **Actions** combo box.

## Add Change to requests

You can add new change to requests. To add new change,

1. From the request list view page, click on the subject link of the request you wish to add change. This opens the request details page.
2. Click **New Change** button on the right hand side of the description field. This opens the **New Change** form. (OR)

Alternatively, you add a new change from the **Associate Change to Incident** pop up page. Click **New Change** button below the filter showing combo box.

3. The details such as Status, Impact, Urgency, Priority, Category, Sub category, Item along with Subject and Description remains the same as of the request. If required, you can modify the same on selecting from the combo box.
4. Select the **Reported By** requester from the list by clicking on the Requester icon.This opens the requester list page and click the requester title.
5. Select the **Technician** from the combo box.
6. Select the **Schedule Start Time** and the **Schedule End Time** from the calender button.
7. Select the affected **IT Services** from the list by clicking on the icon .This opens the **Services Affected** pop up box. Select the affected IT services and **Save** the changes.
8. Select the Assets Involved with the problem by clicking the icon .This opens the **Select Assets** page. Select the **Type of Assets** or the category of assets to be involved from the combo box. Ex: Workstations, Routers, Switches and so on. Select the **Available Assets** under the selected type from the list and move to **Assets involved** using **>>** button. And **Save** the changes.
9. If you have any file attachments for the problem click the **Attach File** button and attach files. **Note:** Maximum size of an attachment can be 10MB.
10. Click **Save.** A new change gets added in the change list view page.

## View Associated Change

You have an option to view the newly added change or the change associated to the request.

To view the change,

1. From the request list view page, click on the request for which you wish to view the change. This opens the request details page.
2. Click **View Change** button on the right hand side of the request description. (OR)

   Click **Actions** combo box -> **View Change** option. This displays the Problems Details page of the change added/associated to the request.

## Detach Request from change

If you want to add another change to the request then the existing change has to be detached.

To detach a change,

1. From the request list view page, click the request you wish to detach the change. This open the request details page.
2. Click **Actions** combo box -> **Detach from Change** option. The request is detached from the change.

# 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. This opens the request list view page.
3. Click the request **Title** for which you want to add the resolution.
4. Check if a resolution already exists for the request by clicking the **Resolution** tab in the **Request details** 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. On specifying the resolution the status can be changed by selecting the status from the combo box.
7. You can also add **Time Spent Entry** details for the request in this page.
8. **Save** the resolution. You can see the resolution is displayed in this page.
9. If you wish to add the specified resolution to the solutions database, then click **Save and Add to Solutions**, or else click **Save**.
10. 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.
11. From the **Topic** drop-down list which contains all the available topics, select the relevant parent topic for the solution.
12. 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.
13. If needed you can also attach files to the solution.
14. 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.

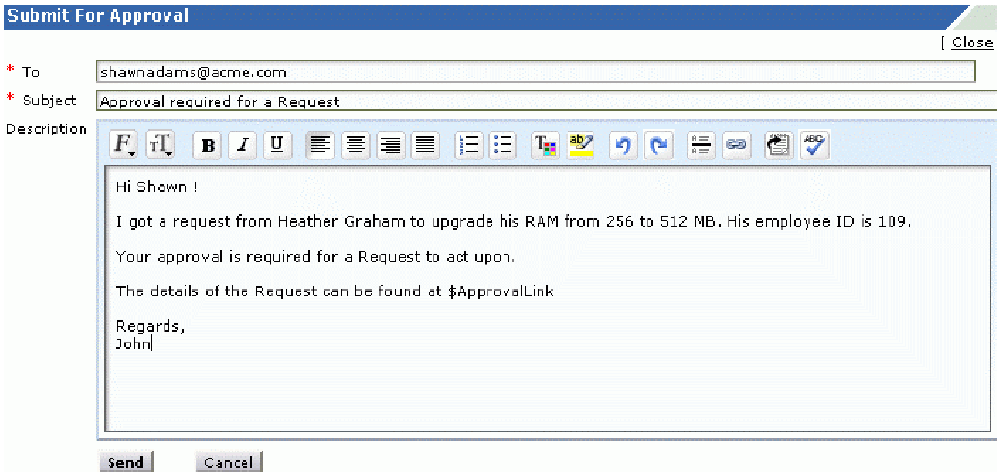
To search for solutions,

1. Log in to ServiceDesk Plus using your **user name** and **password**.
2. Click the **Requests** tab in the header pane. This opens the request list view page.
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 **Search Solution** link. Alternatively, you can also click the **Search Solutions** option under Actions combo box in the task block.
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

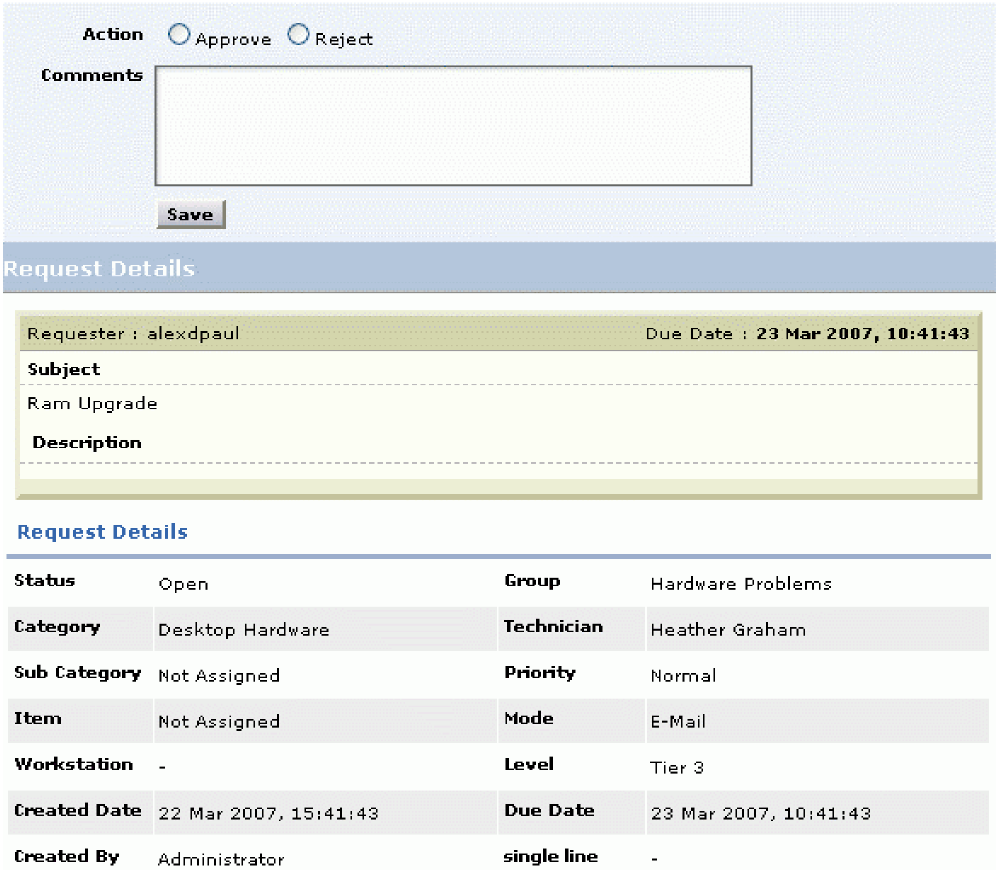
You can submit the request for approval to the manager using this option. To submit for approval,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Request** tab in the header pane. This opens the request list view page.
3. Click the **Title** of a request which you want to submit for approval. 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.




A notification mail will be sent to you along with the request id, approval status for request and comments. This is fundamental as you need not revisit the request at periodic intervals to check the approval status.

In the Request Details page, the **Approvals** tab getting displayed 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,

# 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. This opens the request list view page.
3. Click the **Title** of a request. This opens the View Request page.
4. Click on the requester name link just below the request tab as shown below,


**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. Any additional fields configured will be able to view in the requester details page.

Alternatively, you can also click the **View Requester Details** option available under **Actions** combo box in the task block.

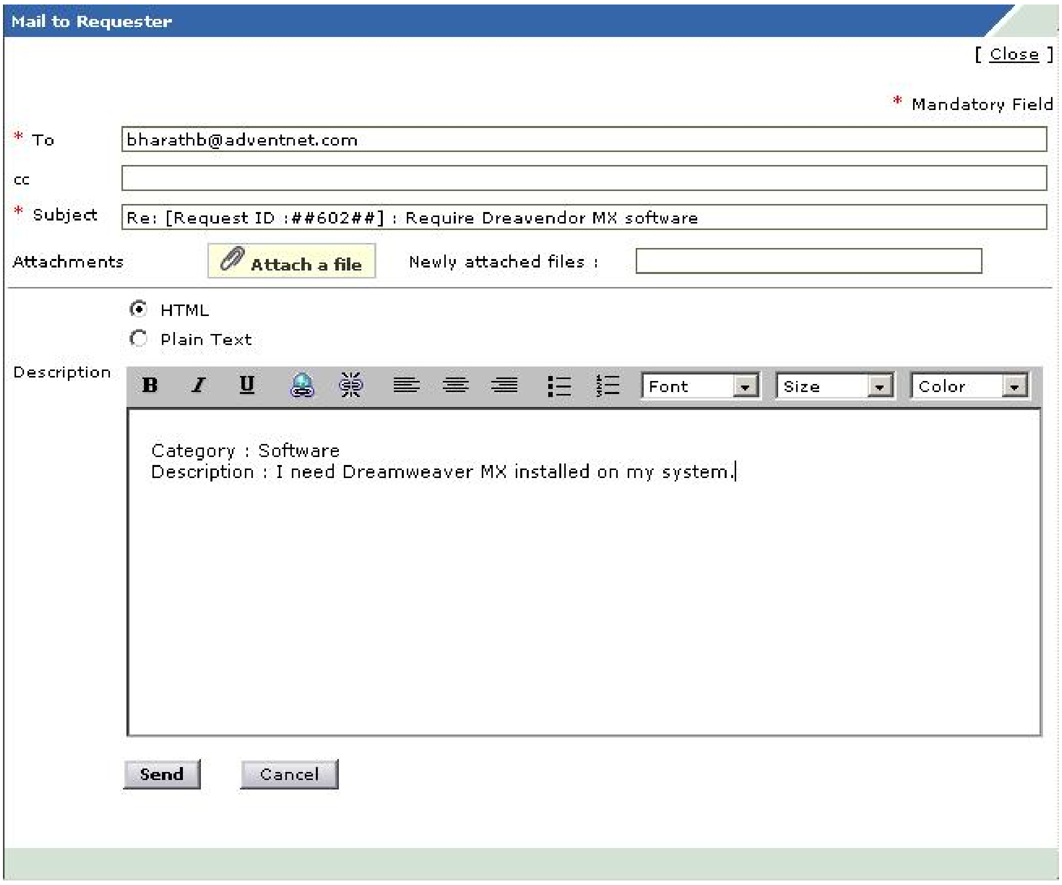

5. Once you have finished viewing the details, click the **Close** link available at the top right corner of the pop-up.

# 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.

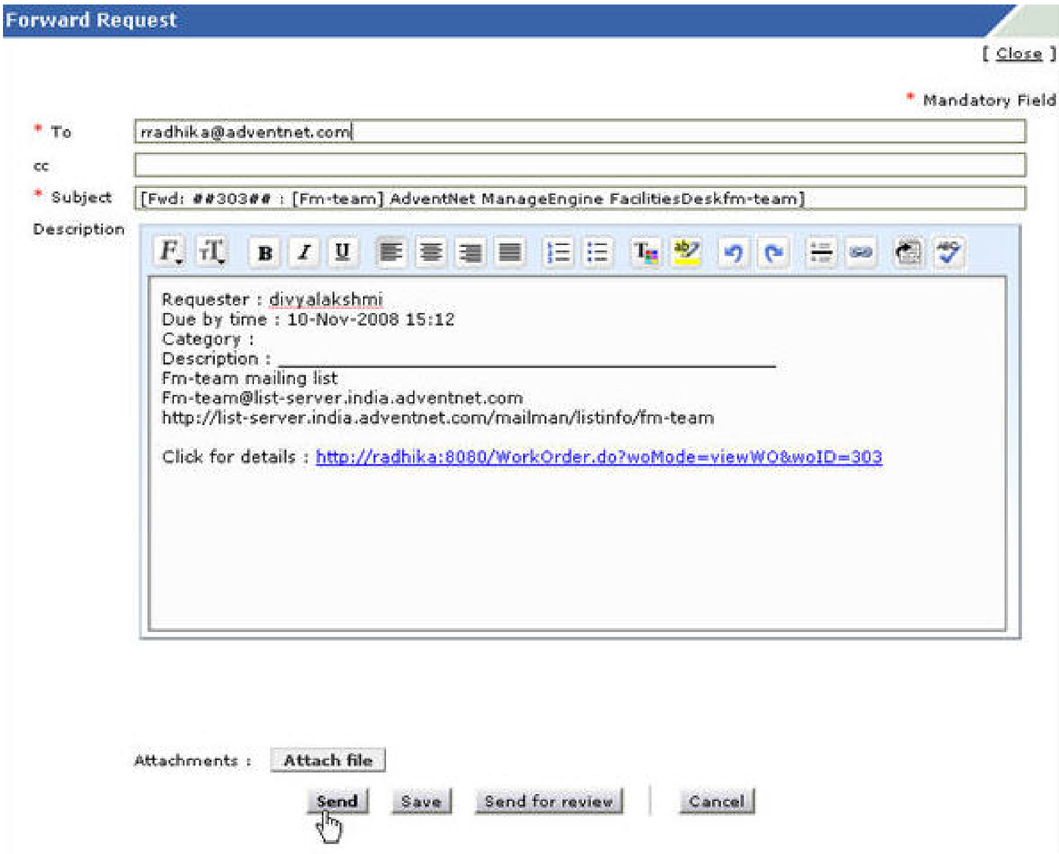
By default, the email editor will be in HTML format. If you do not want the mail in HTML format, then select the radio button **Plain Text**. A confirmation dialog will open. Click OK to continue changing the editor to plain text.

| | |
|---|---|
| | **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. This opens the request list view page.
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**. Alternatively, you can click **Forward the Request** option under **Reply** combo box. This opens the **Forward Request** form.

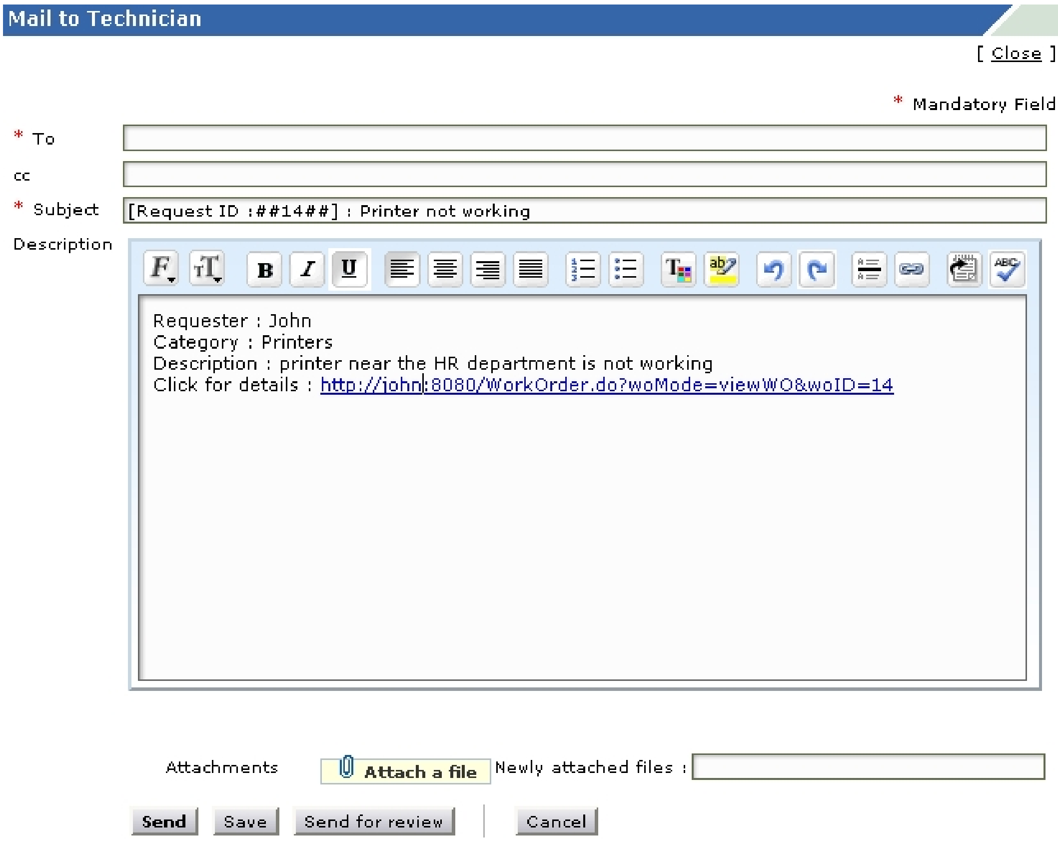



5. Enter the e-mail ID of the person to whom you wish to forward the request in the **To** field. You can also mark a copy of the forward to others. To do this, enter their e-mail IDs in the **CC** field.
6. Edit the **Subject** and **Description** of the e-mail.
7. Click **Attach a File** button to add files as attachments to the mail
8. Click **Send**. The request is sent to all those whose e-mail ID is mentioned in the To and CC field. The forwarded requests will be shown in the conversation block.

# 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. This option is available only to technician assigned requests.

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 **Reply**, 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. At times, the technicians can converse with other technicians regarding the request which also gets listed in the conversation block. 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 view either **All conversation** or **Requester conversations**.


To view all the conversation details, click the **View All Conversation** link at the top of this block. This shows all the conversation between the technician and the requester and between the technicians. If the conversation has any attachments, then the attachment icon can be viewed in this block. To view only the requester conversation, click **View Requester Conversation** link.

## Split As New Request

You can choose to split the requesters conversations into a new request. To split the conversation as a new request,

1. Expand the conversations by clicking on the **View All Conversation** 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 requesters 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 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):


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

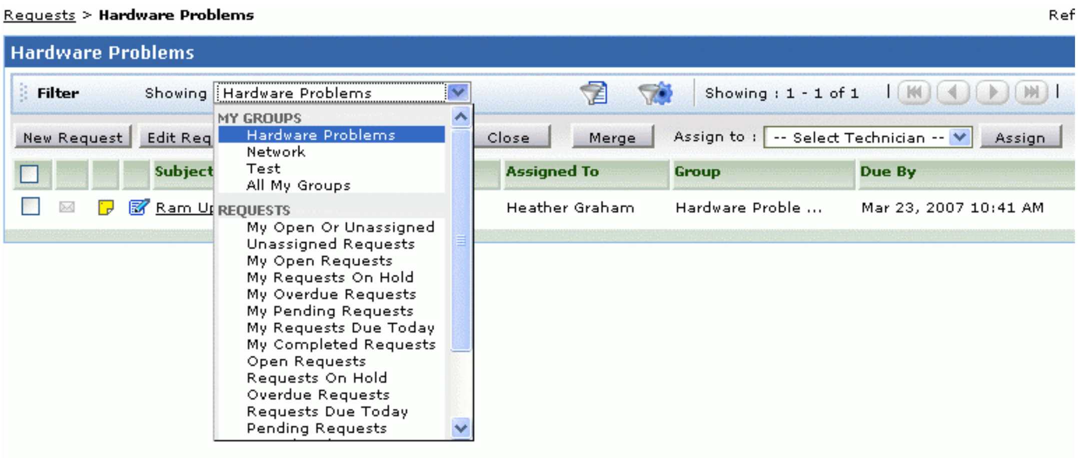
You have three different filter categories to view the specific set of requests. The filter categories are, **My Group**, **Requests** & **My Views.** To view the requests listed under these specified filter categories,

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.

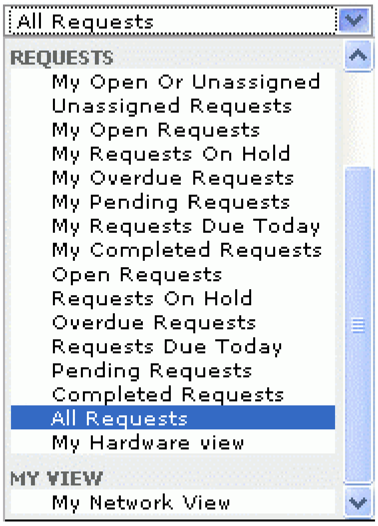
## My Group

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

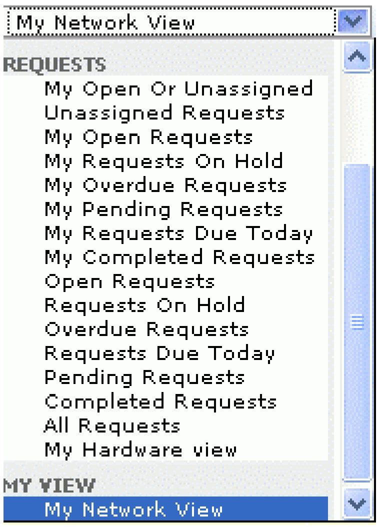
All requests on all status say (closed, pending, open) will be listed under this option.

### 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

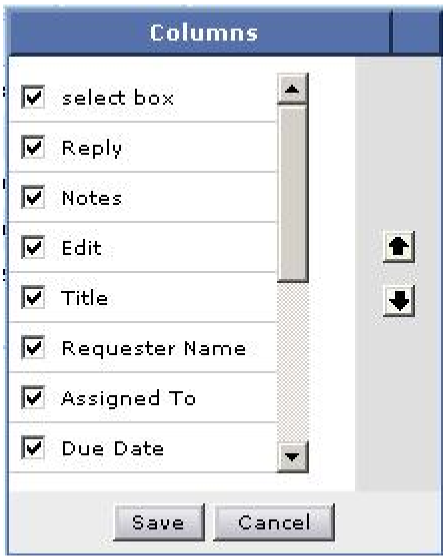
To sort request by column, click the column header. Clicking it once will sort it in ascending order. Clicking twice will sort the column in descending order.

# 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. |

# Multi site on Requests

An organization can have branches spread across different regions and sites of the globe to handle various specialized activities. In this globally distributed environment, a request can be raised from a site to a technician located in another branch of the organization. The request is resolved based on the admin configurations (operational hours, holidays, SLA and business rules) of the site from which the request was raised. Hence with site base configuration, the request module experiences an immense change.

If an organization has no branches and hence no sites configured, then while creating a new request then the default admin configurations gets applied to resolve the request.

## Key entities in Request module

### Creating Requests

- The admin configurations of the selected site in the new request form will get applied to the request.
- The Groups and Technicians corresponding to the selected site will be listed. Groups acts as a filter in choosing the technician to resolve the request.
- A request template with the group and technician pre filled with values needs to be re-selected on choosing the requester, if the group/technician is not associated to the requester's site.

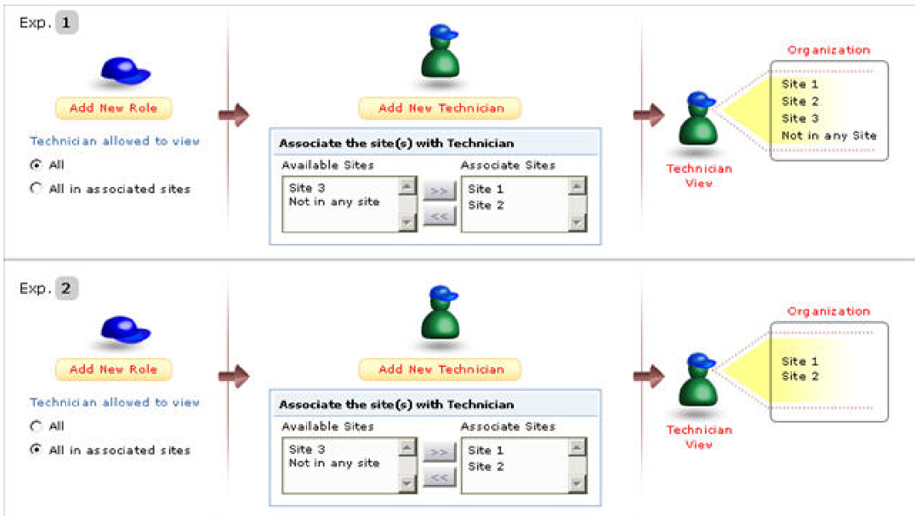
### Editing Requests

If a request needs to be routed to a technician in another site, then on selecting the site, the SLAs and business rules for the site will be applied and the due by time recalculated accordingly.

### Viewing Requests

Technicians can view all the requests of a site if,

- the technician is associated to the site and have the viewing permission as 'All' in Configuring Roles.
- the technician is associated to the site with the viewing permission as 'All in associated sites'.




## Assigning Technicians

ServiceDesk Plus provides you with an option to bulk assign requests to technicians. The request can be assigned to the technician if,

- The technician is associated to the site where the problem persist.
- The technician has the permission to view the requests in all sites. This can be done in Configuring Roles.

  If the technician is not associated to the site where the problem persist and if the technician has restricted view permissions then an error message occurs while assigning the request to the technician as shown below,

Failure Request Id(s) 13 cannot be assigned to the selected technician as the techncian is either, not associated to the site or has restricted access permissions !

***Scenario*** **: Roles on Requests**

A requester from London raises a demo related request persisting in Sydney through self service portal of the ServiceDesk Plus application. By default, the admin configurations for London will be applied to the request. The request is handled by John, a technician in London. John can view and re-assign the request,

- If John is only associated to London with the viewing permissions as '**All**', then he will be able to view the requests in all the sites of the organization. He will be able to assign the request to technicians associated in other sites but if he assigned the request to himself, then the site field automatically changes to London.
- If John is only associated to London  with the viewing permissions as '**All in associated sites**', then he will be able to view all the requests raised in London. He will not have the privilege to re-assign the request to technicians in other sites.
- If John is associated to London and Sydney with the viewing permissions as 'All in associated sites', then he will be able to view all the requests raised in London and Sydney. He can re-assign the request to request to a technician in Sydney but not to technicians in other sites of the organization.

On assigning the request to Amy, the technician in Sydney, the SLAs and business rules configurated for Sydney will be applied to the request and the due by time re-calculated. If Amy is assigned to a Group say, Support, then she can view and re-assign the request,

- If Amy is associated to Sydney along with the viewing permissions as '**All in Group and assigned to him**', then she will be able to view all the requests raised in the groups to which she is assigned.
- If Amy is associated to Sydney and London with the viewing permission '**All his requests**', then she will be able to view only the requests assigned to her. She will be able to re-assign the requests to other technicians in London and Sydney but will not be able to view the request as it does not fall under their permitted scope.

# Problem Management

This module will be available only in the ServiceDesk Plus Enterprise edition of the product.

A problem is an unknown underlying cause of one or more Incidents. The objective of Problem Management is to minimize the adverse impact of Incidents and Problems on the business that are caused by errors within the IT infrastructure, and to prevent recurrence of Incidents related to these errors. In order to achieve this goal, Problem Management seeks to get to the root cause of Incidents and then initiate actions to improve or correct the situation.

The Problem Management process has both reactive and proactive aspects. The reactive aspect is concerned with solving Problems in response to one or more Incidents. Proactive Problem Management is concerned with identifying and solving problems and known errors before incidents occur in first place.

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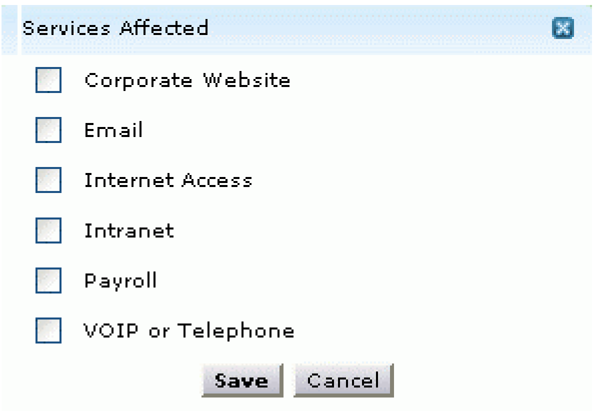
# Creating a New Problem

The goal of problem management is to minimize the adverse impact of incidents and problems on the business that are caused by errors within the IT infrastructure and to prevent recurrence of incidents related to these errors.

To create a new problem,

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Problems** tab in the header pane.
3. Click the **New Problem** button. This opens the New Problem form. Or click the **Create New link** at the left hand side of the page below the tabs then select the **Problem** option.
4. Select the **Reported By** requester from the list by clicking on the Requester icon .This opens the requester list page and click the requester title.
5. Select the **Technician** from the combo box.
6. Select the **Category, Sub Category** and **Item** from the combo box.
7. Select the **Status** of the problem say **Open** from the combo box.
8. Select the **Impact, Urgency and Priority** of the problem from the combo box.
9. Select the **Due by Date** and the **Closed Date** from the calender button.
10. Select the affected **IT Services** from the list by clicking on the icon .This opens the **Services Affected** pop up box as shown below. Select the affected IT services and **Save** the changes.




1. Select the Assets Involved with the problem by clicking the icon .This opens the **Select Assets** page. Select the **Type of Assets** or the category of assets to be involved from the combo box. Ex: Workstations, Routers, Switches and so on. Select the **Available Assets** under the selected type from the list and move to **Assets involved** using **>>** button. And **Save** the changes.
2. Specify the **Title** of the problem in the given text field. This is a mandatory field.
3. Specify the details about the problem in the **Description** field.
4. If you have any file attachments for the problem click the **Attach File** button and attach files.

   **Note:** Maximum size of an attachment can be 10MB.

5. **Save** the changes.

# Viewing Problem Details

1. Log in to the ServiceDesk Plus application using your **user name** and **password**. This opens the ManageEngine ServiceDesk plus home page.
2. Click the **Problems** tab. This opens the problems list view page.
3. Click the **Title** of the problem to view the problem details. This opens the problem details page. By default the problem details page opens in the Problem tab.

   From the problem details page, you can navigate to the previous or the next problem using the navigation buttons on the top right hand side corner. Using this, you need not return back to the list view page to view the next problem.

### Problem Tab

The problem tab shows general details of the problem such as, Category, Technician, Status, Priority, Urgency, Impact, Requester, Reported Date, Due By Date, Closed Date, affected IT Services and Assets Involved.

Click the **Edit** button to edit all the details of the change. You also have inline edit option for all the details. To modify the details of the problem click the details and choose the option from the combo box.

### Analysis Tab

In the Analysis tab the technicians analyze the root cause and impact of the problem and attach the same in SDP as part of the problem. Also they specify the symptoms of the problem to identify the same problem in the future.

### Solution Tab

In the solutions tab resolution for the problem is given as Work Arounds and Solutions. Work Arounds are temporary solutions that can be used by the technician till the actual solution is ready. Solutions are the permanent fixes to the problems raised.

### Incidents Tab

The incidents tab shows the list of all associated incidents with the problem. You have **Attach** option to attach the incident with the problem. And the **Detach Incidents** option to detach associated incidents with the problem.

### History Tab

The **History** tab shows the problem history from the time of its creation. It shows all the actions performed in the problem. The history tab also shows the incidents and the changes associated to the problem on clicking the **Property View** link available on the right hand side. 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 Problem

To edit a problem available in the ServiceDesk Plus Problem module

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the Problems tab in the header pane. This opens the problems list view page.
3. Click the **Title** of the problem which you want to edit. This opens the **Problem** details page which list the **Tasks** that can be performed on the problem.
4. Click the **Edit** link on the top of the page to modify the problem details. This opens the **Edit Problem** page. From this page you can add status of the problem from open to close, and also change the entire template to a new one apart from the regular editing of the problem details.

   Alternatively, you also have an inline edit option to modify the problem details in the view problem page. Click the edit icon on the right side of each block which opens the problem 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 **Problem Details** one by one.

## Modifying the Problem Details

In the editable problem form you can change the problem details, such as Status of the problem as **Closed or Open**, **Impact** details, **Urgency and Priority** details. You can also modify **affected IT Services** and **Assets Involved** in the problem.

## Modifying Owner Details

You can modify the **owner** details and **technician** details of the problem. You can also edit the **Reported Date** and **Due by Date** of the problem. If the problem has been closed, then the **Closed date** will be displayed beside this due by date.

## Modifying the Problem Category

You can change the **Category, Sub Category** and **Item** of the problem. If the same was not appropriately chosen at the time of submitting then the problem can be selected now from the drop down list.

## Modifying the Problem Description

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

## Appending Attachments

If you wish to attach more files to the problem, 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 problem by clicking the delete icon available beside the attachment.

# Closing Problem

If a requester is completely satisfied that his/her problem has been attended and completely solved, then the problem can be closed.

To close a problem

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

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

You can reopen a problem from the closed state to open state. To do this, open the closed problem that you wish to reopen by clicking the edit button. Then change the status field from **Closed** to **Open** and save the changes. When a problem is opened from the closed state, you can change the **Due By time** of the problem. 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 problem at a time**

1. In the **Problem** list page, select the problem from the list by enabling the check boxes available beside the **Problem Name.**
2. Now click the **Close** button.

**To view the closed requests**

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

# Picking Up Problem

ManageEngine ServiceDesk Plus provides an option to the technicians to self-pick up problem. If there are unassigned problems, the technicians can pick up any of the unassigned problems from the list. As the problems are picked up and answered quickly the waiting time to assign the problem to each technician and then closing the problem will be reduced. This in turn will increases the turnaround time and the efficiency of the IT help desk team.

To pick up problems,

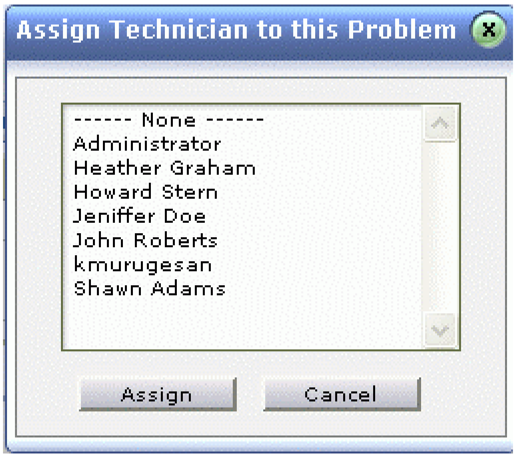
1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Problems** tab in the header pane. The unassigned problems will be in bold font.
3. Select the problems you would like to pick up by enabling the check box. Click **Pick up** button. The selected problem will be assigned to you. (Or)
4. You can also pick up problems after viewing the problem details. Click the title of the problem to open **View Problem** page.
5. Click **Assign** tab. Select **Pick Up** option to pick up the problem.

# Assigning Technician

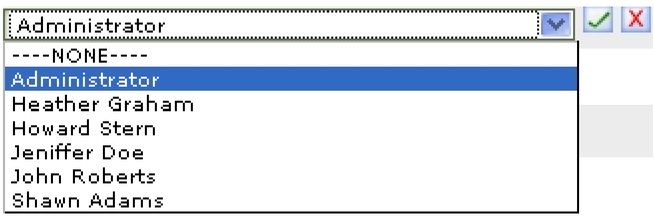
Each problem will be handled by a technician, who would be responsible for closing the problem.

To assign a technician to the problem,

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Problem** tab in the header pane. This opens the **Problems** list page.
3. Click the **Title** of the problem for which you have to assign a technician. This opens the problem details page.
4. Click the **Actions** combo box on the right hand side of the page ->Click **Assign Technician** link from the list. This opens **Assign Technician to this Problem** pop up page as shown below. Select the technician from the list and **Assign** the problem to the technician.



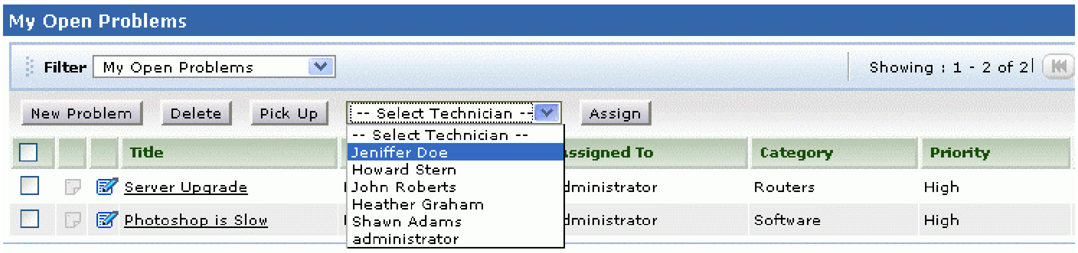

5. Alternatively, you can also assign technician using inline edit option. Click the technician name shown in the problem details block. This opens the drop down box as shown below. Select the technician from the list and click the icon to select the technician name else click cancel icon.




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

To bulk assign problems to technicians

1. In the **Problems** list page, select the problems to be assigned a technician by enabling the check box beside left side each of the problem title.




2. Click the **Select Technician** check box. Select the technician from the drop down list.
3. **Assign** the technician**.**

# Problem Analysis

The goal of Problem Management is to find the root cause of the incidents and reduce the impact on the business by providing solutions and workarounds. In the problem analysis the technicians analyze the root cause and impact of the problem and attach the same in SDP as part of the problem. Also they can specify the symptoms of the problem to identify the same problem in the future. The following are the steps to understanding the cause of the problem,

- Symptoms - Evidences helping in identifying the problem.
- Root Cause - Detecting the underlying cause of the incident.
- Impact - Adverse effect of the problem on the business.

To specify the Problem Analysis,

1. Log in to ServiceDesk Plus application using your user name and password.
2. Click the **Problems** tab -> click the title of the problem for which you need to specify the analysis. This opens the problem details page.
3. Click the **Analysis** tab.

### Adding Impact details,

1. Click the **Add** button. You can see the text area getting displayed for the impact details.
2. Specify the impact details in the text field and **Save** the changes. You can see the details getting displayed below the title. **(OR)**
3. If you like to attach a file on the impact details instead of entering the details in the text field then click **Attach File** button to attach a file for the impact details. The maximum size of the attachment should be 10MB.

### Adding Root Cause,

1. Click the **Add** button. You can see the text area getting displayed for the root cause.
2. Specify the root cause in the given text field and **Save** the changes. You can see the details getting displayed below the title. **(OR)**
3. If you like to attach a file on the root cause instead of entering it in the text field then click **Attach File** button to attach a file for the root cause. The maximum size of the attachment should be 10MB.

### Adding Symptoms,

1. Click the **Add** button. You can see the text area getting displayed for the symptoms.
2. Specify the symptoms in the given text field and **Save** the changes. You can see the details getting displayed below the title. **(OR)**
3. If you like to attach a file on the symptoms instead of entering it in the text field then click **Attach File** button to attach a file for the symptoms. The maximum size of the attachment should be 10MB.

# Problem Solutions

Resolution for the problem can be given as Work Arounds and Solutions in ServiceDesk Plus. Workarounds are temporary solutions that can be used by the technician till the actual solution is ready. Solutions are the permanent fixes to the problems raised. The problem is considered as a known error when a solution or work around is added to a problem.

To add resolution,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**. This opens the ManageEngine ServiceDesk plus home page.
2. Click the **Problems** tab. This opens the problems list page.
3. Click the **Title** of the problem for which you like to view the reminder. This opens the problem details page.
4. Click the **Solution** tab.

### To Add Work Around,

1. Click the **Add** button. You can see the text area getting displayed for the **WorkAround** details. Specify the temporary solutions for the problem.
2. **Save** the details. You can see the details getting displayed.
3. Click **Attach File** button to attach a file for the impact details. The maximum size of the attachment should be 10MB.

### To Add Solution

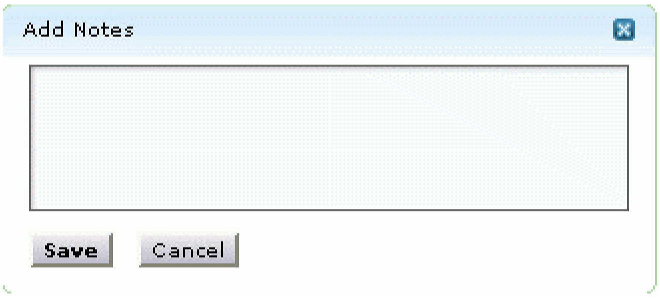
1. Click the **Add** button. You can see the text area getting displayed for the **Solution** details. Specify the permanent fixes to the problems.
2. **Save** the details. You can see the details getting displayed.
3. Click **Attach File** button to attach a file for the impact details. The maximum size of the attachment should be 10MB.

# Adding Notes

If you like to add additional information including technical information based on your observations to a particular problem, then you can **Add Notes** to that problem. You can also use notes to update the status of the problem.

To add a note to the problem,

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Problems** tab in the header pane.
3. Click the **Title** of the problem to which you would like to add a note. This opens the problem details page.
4. Click the **Add New** combo box -> Select **Note** option. This opens **Add Notes** page as shown below,




5. Enter your content in the text box. These notes are public.
6. Save the details. The note is added at the bottom of the problem 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 problem. The added notes will be displayed in the ascending order. You can also edit or delete the notes that have been added.

# Adding Tasks

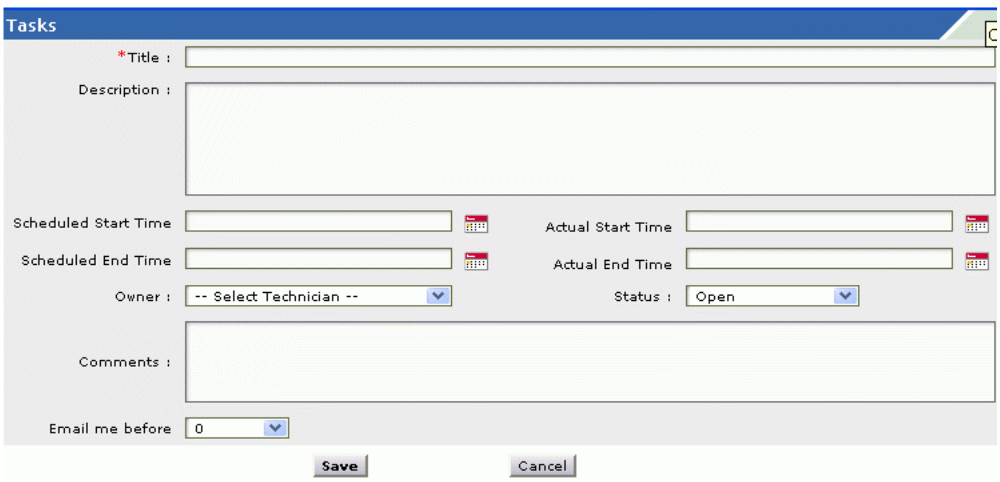
Using this option you can assign different tasks to different technicians. Task is a sub-unit of an activity. If a problem involves multiple technicians work, then the technician whoever receives the problem (owner of the problem) can assign different tasks to different technicians.

To add tasks,

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Problems** tab in the header pane.
3. Click the **Title** of the problem to which you would like to add tasks.
4. Click the **Add New** menu -> select **Task** 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** from the calendar button. Also select the **Scheduled End Time** for the task from the calendar button.
8. The **Actual Start Time** and **End Time** of the task will be entered by the technician doing (owning) the task.

The actual start time and end time is the real time schedule of the task. The scheduled start time and end time specified by the problem owner is a tentative time schedule.

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 **Email me before** option and select the number of days from the combo box. This option will be selected based on the scheduled start time.
13. **Save** the values. You can see a Tasks tab getting created next to the solution tab. All the tasks created for the problem 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.

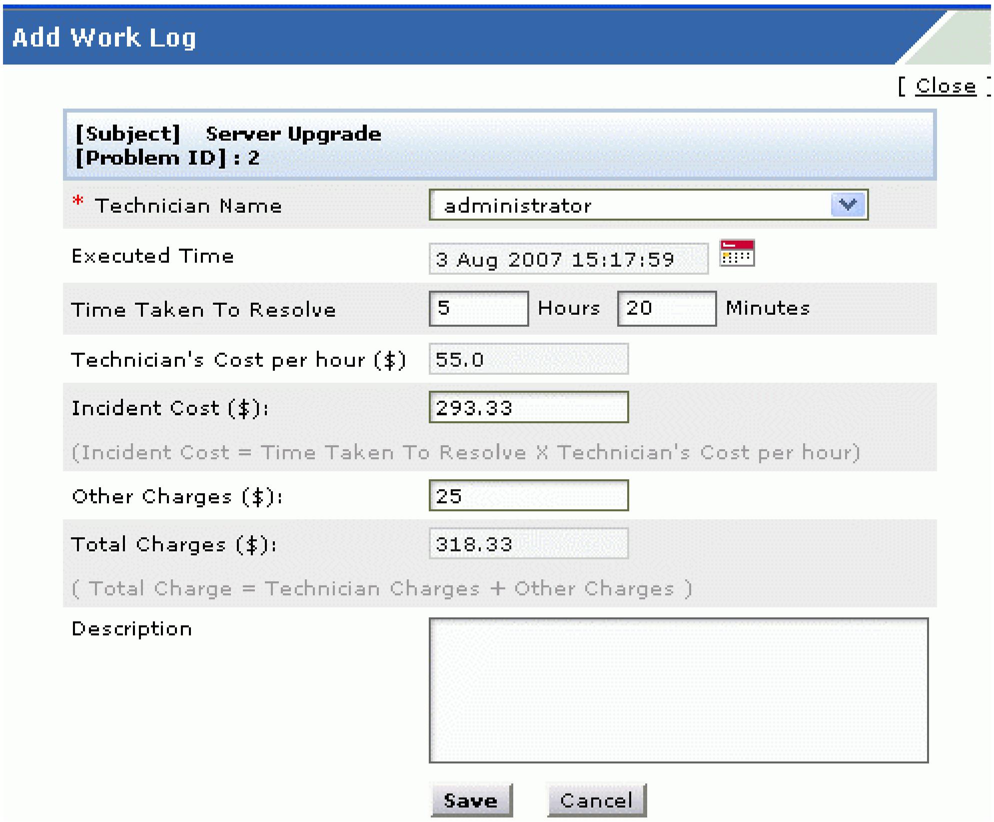


# Adding Work Logs

You can enter the technicians **time spent** details for the problem using this option. The total time spent will exclude the time that the problem was kept on hold. It takes the time of creation to till the problem was closed.

To Add Work Logs,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Select the **Technician Name** from the combo box.
3. Specify the **Executed Time (**date & time) taken to resolve the problem from the calender button.
4. The **Technician Cost per hour** will be fetched automatically from the technician details, which is a non-editable field. If you have already entered the per hour cost of the technician while adding the technician details, then the details will be fetched automatically. If you wish to change these values, you can do so manually.
5. The **Incident Cost** will be automatically calculated taking the (total time spent to resolve the problem * Technician's cost per hour).
6. If there are any extra charges specify in the **Other Charges** field.
7. Using the above two data the **Total Charges (Technician Charges + Other Charges)** will be displayed automatically.
8. Specify any relevant information about the time spent in the description field.
9. **Save** the details.



# Deleting Problem

You have an option to delete individual problems or group of problems together.

To delete individual problems

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Problems** tab in the header pane.
3. Click the **Title** of the problem to be deleted in the problems list view page. This opens the **Problem Details** page.
4. Click the **Actions** combo box on the top right hand side of the page.
5. Click the **Delete** link from the list. A dialog pops up asking you to confirm on the delete process.
6. Click **OK** to proceed. You can see the problem deleted from the list.

To delete more than one problem at a time

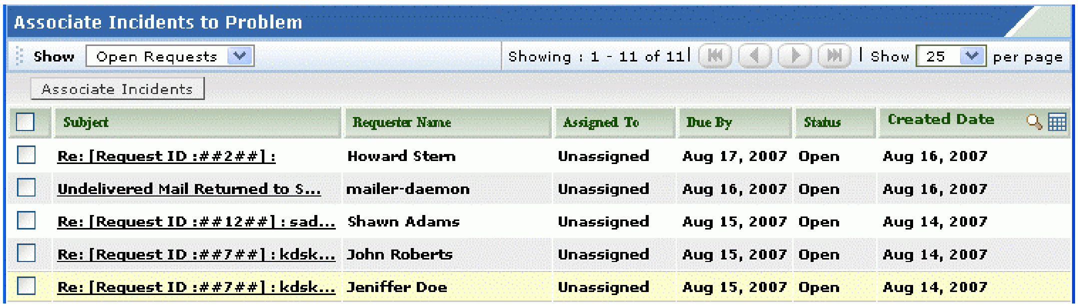
1. In the Problem list view page, select the problems to be deleted by enabling the check boxes.
2. Click the **Delete** button. A dialog pops up asking you to confirm on the delete process.
3. Click **OK** to proceed deleting Or click **Cancel** to abort deletion.

# Associating Incidents to a Problem

You have an option to associate Incidents to the problem. Similar Incidents to problem can be associated in order to track the number of incidents occurred for the same problem and also to track the priority and severity of the problem based on the number of incidents.

To Associate Incidents,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Problems** tab. This opens the **Problem List View** page. Click the problem title to be associated with the Incidents. This opens the problem details page.
3. Click the **Actions** combo box on the top right side of the page. Click **Associate Incidents** option. This opens **Associate Incidents to problem** page as shown below,



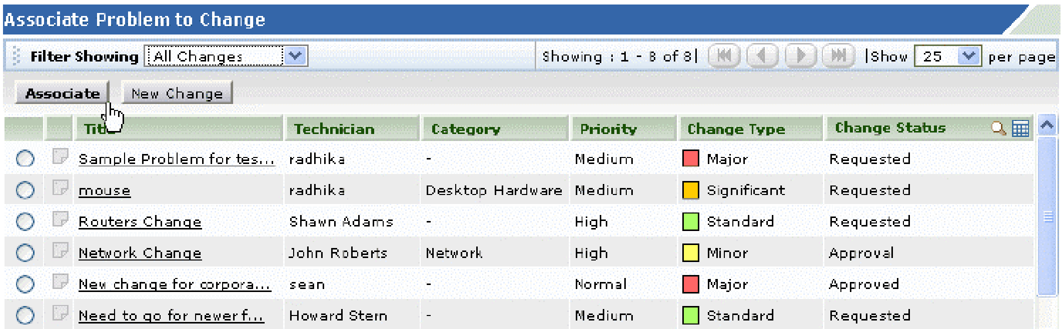

4. Select the type of requests to be displayed by selecting from the **Show** combo box on the top left hand side of the page. Ex: Open Requests or All Requests and so on. On selecting the request type the corresponding requests gets listed.
5. Select the Incidents from the list by enabling the check box beside each incident.
6. Click **Associate Incidents** to associate respective requests to the problem (particular selected problem). The associated incidents gets listed in the Incidents tab in the problem details page as shown below,

# Associating Changes to Problem

You have an option to associate Changes to the problem. Similar Changes to problem can be associated in order to track the number of changes occurred for the same problem.

To Associate Changes,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Problems** tab. This opens the **Problem List View** page.
3. Click the problem **Title** to be associated with the Incidents. This opens the problem details page.
4. Click the **Actions** combo box on the top right side of the page. Click **Search Changes** option. This opens **Associate Problem to Changes** page as shown below,




Select the type of change to be displayed by selecting from the **Filter Showing** combo box on the top left hand side of the page. Ex: Open Change or All Change and so on. On selecting the change type the corresponding changes gets listed.

Select the Changes from the list by enabling the check box beside each change.

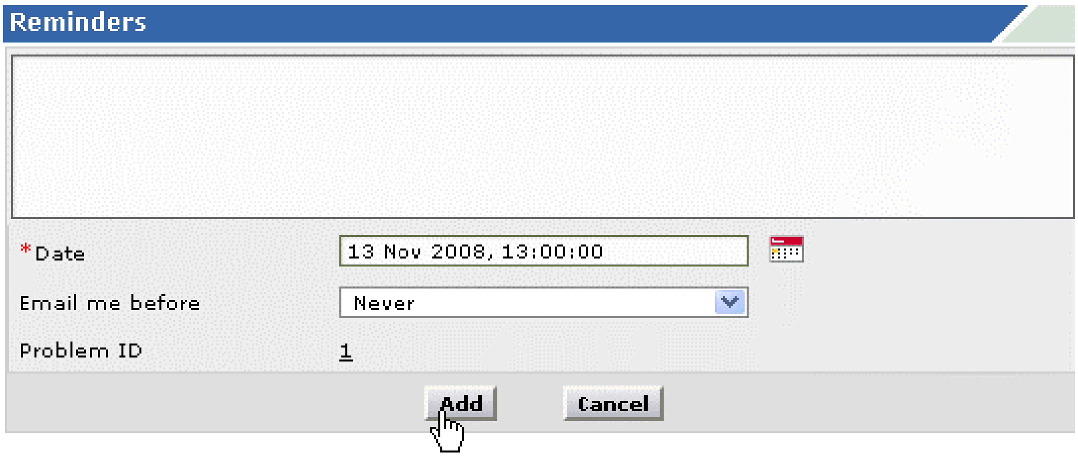
Click **Associate** button to associate respective changes to the problem (particular selected problem).

# Adding Reminders

You can add reminders to the problems using this option. All the pending tasks specific to the problem can be added as reminders. The technician can add these task list as a personal reminder to himself/herself. On adding these reminders they get displayed in **My Reminder(s)** under **Quick Actions**.

To add reminders,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Problems** tab in the header pane. This opens the problems list page.
3. Click the **Title** of the problems from the list. This opens the problems details page.
4. Click on the **Add New** combo box on the top right side of the page. Click the **Reminder** link. This opens the Reminders page. Specify the content in the given text field.
5. Select the reminder **Date** and Time by invoking the calendar icon.
6. To be reminded of the task in advance, select the time from the **Email me before** combo box.
7. The problem id is shown in non editable mode.
8. Click **Add** button to add the reminder. You can see the reminder getting listed in the **My Reminder(s)** pop up window in ascending order.

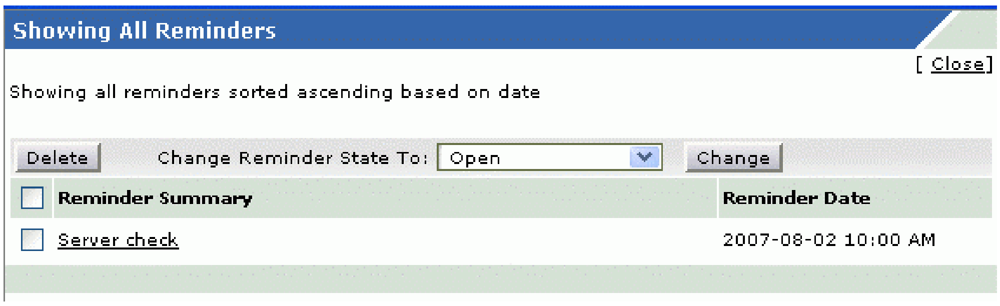


# Viewing Reminders

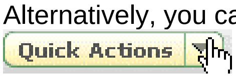
You can view the reminders specific to each problem in this module.

To view reminders,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**. This opens the ManageEngine ServiceDesk plus home page.
2. Click the **Problems** tab. This opens the problems list page.
3. Click the **Title** of the problem for which you like to view the reminder. This opens the problem details page.
4. Click the **Actions** combo box -> Click the **View Reminders** option. This opens the **Showing All Reminders** Page as shown below. This lists all the reminders in ascending order based on the date.




5. Once the task is completed you can change the state of the reminder from open to completed. To do this, select the **reminder** from the list to be closed by enabling the check box beside each of the reminder.
6. Select the **Change Reminder State To** Completed then -> click **Change** button to change the state. You can see the reminder striked off to indicate the change.

   Alternatively, you can also view the reminders by, clicking **Quick Actions** link 

 -> **My Reminder(s)** option under the Reminders block. This opens the **My Reminders** pop up window as shown below. This shows all your reminders irrespective any specific module.

You can also add new reminders by clicking **+Add New** link at the bottom of the my reminders form. 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.

You can also delete the task by clicking the delete icon beside the task.

# Publishing Announcements

ServiceDesk Plus gives you an option to publish announcements while fixing the problem without breaking the work flow. Say if you want to inform the company that, the mail server will be down for next five hours and your are fixing the problem then in this case you need not go to the home page to make an announcement you can publish the announcement from the problem module.

To Publish Announcements,

1. In the Problem details page click the **Actions** combo box and select the **Make an announcement** option. This opens the **Add New** page.
2. The announcement **Title and Description** of the problem gets displayed automatically. This is a mandatory field. You can also modify the title and description of the problem.
3. Specify any relevant information about the announcement in the **Description** field. Also specify the result under the **Resolution** title.
4. Specify the date and time to **Show this announcement, between these dates** from the calender button. If this field is not entered the announcement will be displayed in the dashboard for ever.
5. To **Show this announcement only to technicians** select the check box.
6. To **Send this announcement as mail** select the check box.
7. **Save** the changes. You can see the announcement page as shown below. To view the next and previous announcement in the dash board click the **Next** and **Previous** buttons on the right side of the page.


You can also edit and delete the announcement in the same page.

To edit the announcement,

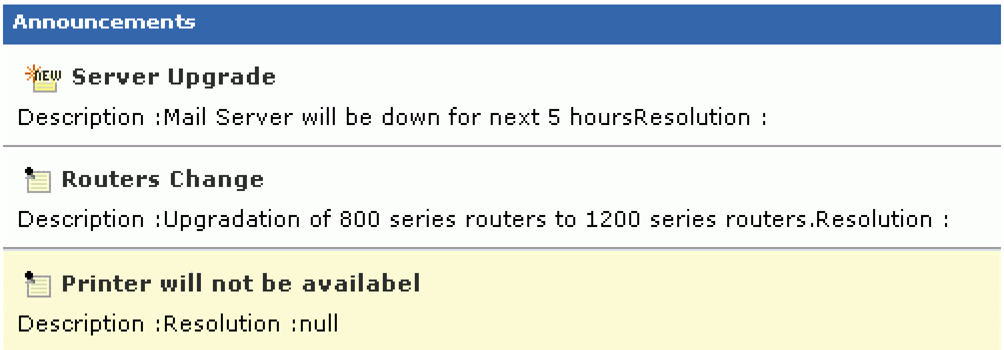
1. Click **Edit** button. This opens the Edit Announcement form.
2. Change the details of the announcement in form.
3. **Save** the changes. All the changes made in the announcement will be saved.

To delete an announcement,

1. To delete the announcement click **Delete** button. A dialog pops up asking you confirm on the delete operation.
2. Click **OK** to delete. Or click **Cancel** to retain the announcement.

Alternatively you can also publish announcements company wide or just to the technicians group from the **Home page.** The announcements are displayed just below the my view requests tab in the home page as shown below,

All recent announcements will be displayed first based on the date. To view all the announcements (even completed ones), click the **Show All** button on the right side of the page.




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 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.

# Send Notifications

To send notifications specific to the problem to the CAB members, technicians or to any concerned person then,

1. Log in to ServiceDesk Plus application using your user name and password.
2. Click the **Problems** tab in the header pane. This opens the problem list view page.
3. Click the title of the problem to which the notification has to be sent. This opens the problem details page.
4. Click the **Actions** combo box and select the **Send Notification** link. This opens the **Send Notification** page.
5. Specify the **To** and **CC** address in the given text field.
6. Specify the **Subject** of the notification in the given text field.
7. Specify relevant information about the notification in the **Description** field.
8. **Send** the notification.

# Printing Problem

To print a problem,

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the Problems tab in the header pane.
3. Click the **Title** of the problem you would like to print.
4. Click the **Print Preview** link on the right side **Tasks** block. The print preview page of the problem opens in a pop-up window.

   In the print preview page you can view the Impact Analysis, Root Cause, Symptoms, WorkAround, Solution, Problem Details Notes and their attachments.

5. 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 problem at the printer that is linked to your workstation.

# Change Management

Changes arise as a result of problems, but many changes can come from proactively seeking business benefits such as reducing costs or improving services. The goal of Change Management is to ensure that standardised methods and procedures are used for efficient and prompt handling of all Changes, in order to minimise the impact of change-related incidents upon service quality and consequently to improve the day-to-day operations of the organization.

A change request entails a considered approach to assessment of risk and business continuity, change impact, resource requirements and change approval. This approach is important to maintain the balance between the need for change against the impact of change.

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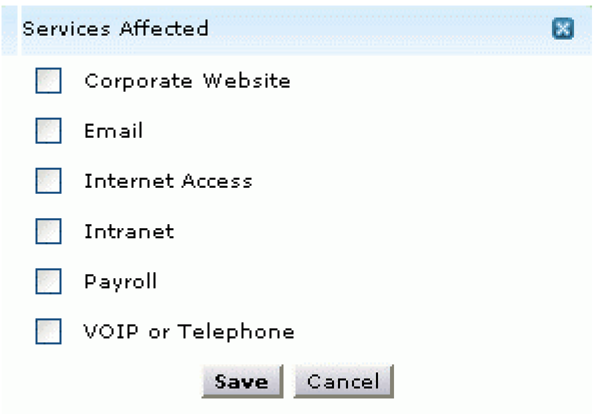
# Creating New Change

There can be different types of changes that can happen in an organization. It can be a Major, Minor or Standard change. For any change a request for change has to be sent to the change management team by creating a **New Change**.

To create a new change,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Create New** link at the top left hand side of the page ->and select the **Change** option. This opens the New Change form. Or click the **Changes** tab and select the **New Change** button to open the **New Change** form.
3. Select the **Requested By** requester from the list by clicking on the Requester icon. This opens the requester list page and click the requester title.
4. Select the **Technician** from the combo box.
5. Select the **Category, Sub Category** and **Item** from the combo box.
6. Select the **Status** of the change say **Open** from the combo box.
7. Select the **Impact, Urgency and Priority** of the change from the combo box.
8. Select the **Change Type** from the combo box. Say Major.
9. Select the **Scheduled Start Time** and **Scheduled End Time** from the calender button.
10. Select the affected **IT Services** by the change from the list by clicking on the icon. This opens the **Services Affected** pop up box as shown below. Select the affected IT services and **Save** the changes.




11. Select the Assets Involved with the change by clicking the icon. This opens the **Select Assets** page. Select the **Type of Assets** or the category of assets to be involved from the combo box. Ex: Workstations, Routers, Switches and so on. Select the **Available Assets** under the selected type from the list and move to **Assets involved** using **>>** button. And **Save** the changes.
12. Specify the **Title** of the change in the given text field. This is a mandatory field.
13. Specify the details about the change in the **Description** field.
14. If you have any file attachments for the change click the **Attach File** button and attach files.

**Note:** Maximum size of an attachment file can be 10MB.

15. **Save** the changes. You can see the new change created in the change list view page.

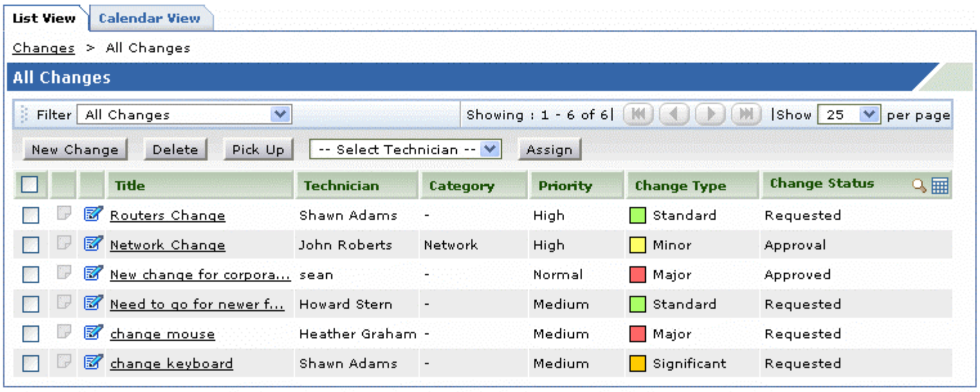
# Forward Schedule of Change

The change home page shows two types of views, **List View** and **Calendar View.** The list view shows the list of all changes to be made. And the Calender View shows the changes with start & end schedule time marked in different colors based on the type.

To view the schedule,

1. Log into ServiceDesk Plus using your **user name** and **password**.
2. Click the **Changes** tab in the header pane. This opens the change list view page by default as shown below.

## List View

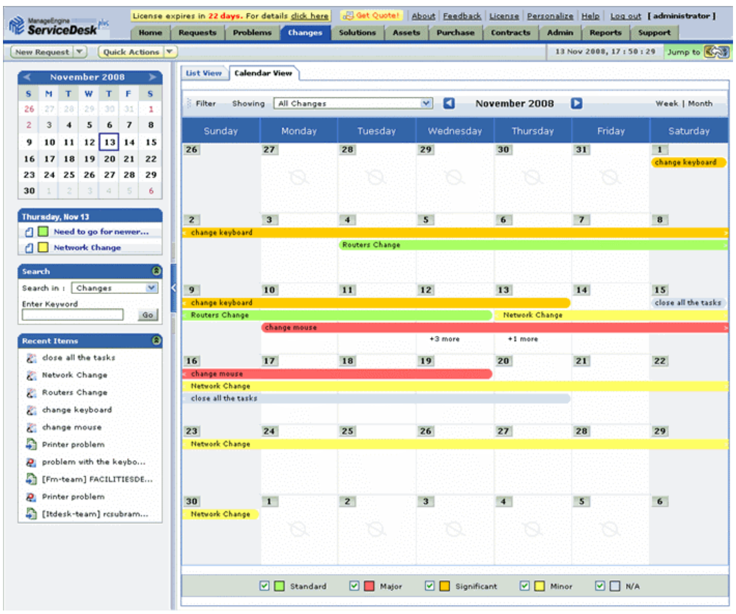



| Title | Technician | Category | Priority | Change Type | Change Status |
|---|---|---|---|---|---|
| Routers Change | Shawn Adams | - | High | Standard | Requested |
| Network Change | John Roberts | Network | High | Minor | Approval |
| New change for corpora... | sean | - | Normal | Major | Approved |
| Need to go for newer f... | Howard Stern | - | Medium | Standard | Requested |
| change mouse | Heather Graham | - | Medium | Major | Requested |
| change keyboard | Shawn Adams | - | Medium | Significant | Requested |

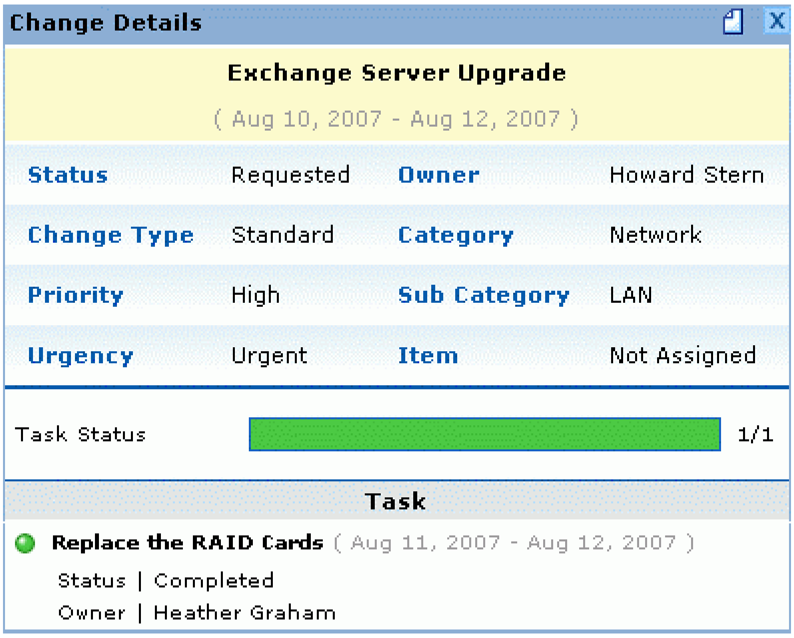
## Forward Schedule of Change (Calender View)

1. Click the **Calendar View** tab next to the list view tab in the home page. This opens the calender view of change as shown below.

   To display the changes in the **Calender View**, the changes should have the scheduled start time and end time.



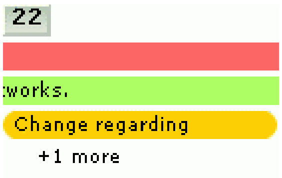
- The Calender View displays all the scheduled changes for the entire month. Click the forward arrow to go to the next month. Click the backward arrow to go to the previous month.
- You can choose the type of change from the **Filter Showing** combo box. Hence you can view the Open Changes, Approved Open Changes, All Changes and Completed Changes.
- A thick strip will be running across the scheduled **start date** and **end date** of the change. The outward curve **(** Change regarding at the beginning of the strip indicates the start date. And the inward curve **)** Change regarding at the end of the strip indicates the end date.
- The color of the strip depends on the type of the change. Say standard, major,minor and so on.
- At the bottom of the page you have all the four change types with one N/A type displayed along with the check boxes. For ex: If you wish to view only the standard changes for the month in the calender view, then select the Standard check box and de-select the other change types. If you wish to view all the change types then select all the change type by enabling the check box.
- The backward arrow in the strip Change Regarding Building. indicates the previous week continuation of the change.
- And the forward arrow in the strip indicates that the change will be continued for the next week.
- On clicking at any part of the strip you will be able to view the change details page as shown below.

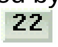


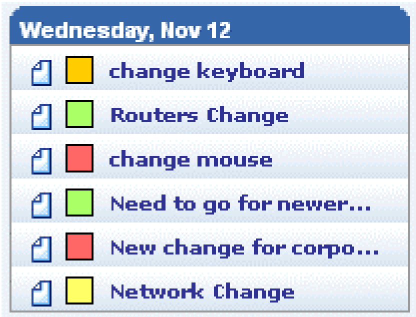

In the change details page,

- If there are any tasks associated with the change then the task status bar will also be displayed.
- If all the tasks are completed then the status bar would be in green color.
- Out of two tasks, if One task is complete and the other task is incomplete then the status bar would show half green color.
- You will be able to view the number of tasks completed / the total number of tasks. Say 1tasks completed out of 2 tasks.
- You will also be able to see the Status of the task and owner at the bottom of the page. If the status is completed then the bullet point would be in green color. If the status of the task is incomplete then the bullet point would be in red color.

- The calender can show only three changes in a particular date. If there are more than three changes in a date, then the calender will show the extra more changes in the text form as **+n more** as shown below.

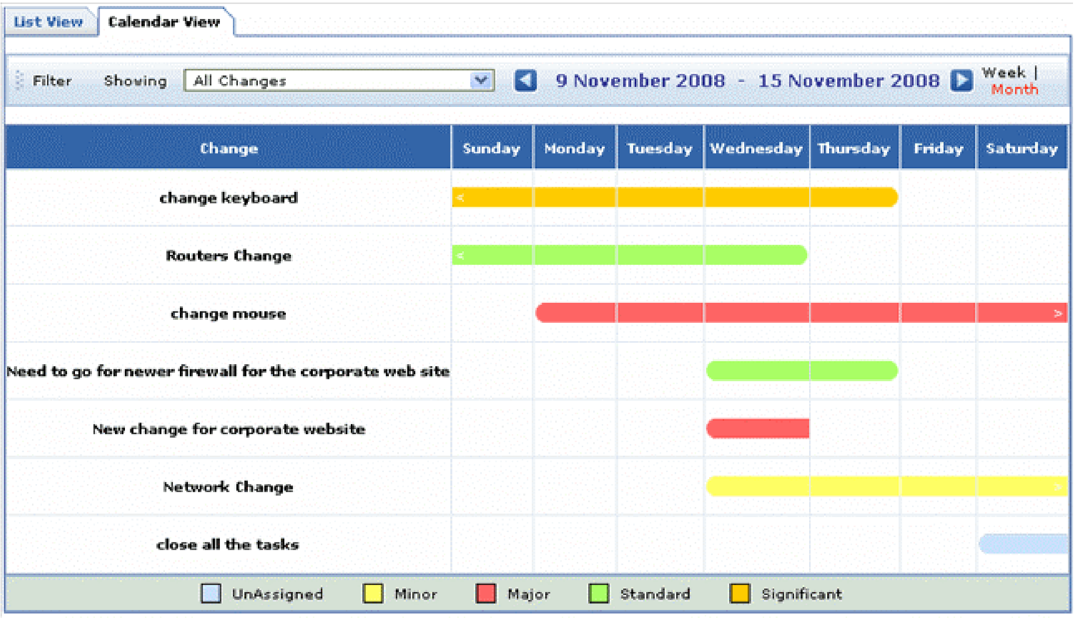



- Clicking the **+ n more text link**, will list all the displayed changes in the calender, plus the extra more changes in the left hand side of the page as shown below. They can also be viewed by clicking the **dates of the marked changes** in the calender. Say by clicking the date  you will be able to view the list.




- A calender on the top left hand side of the page, shows the current date marked in a box. All the changes in the current month will be underlined and bold. On clicking any of the underlined date will list all the scheduled change for the particular date below the calender.


- Click the **Week** link at the Top of the page to view the weekly change schedule as shown below. Click the forward arrow  to view next week change schedules. Click the backward arrow  to view the previous week change schedules.


List View
Calendar View
Filter
Showing
All Changes
9 November 2008 - 15 November 2008
Week |
Month
Change
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
change keyboard
Routers Change
change mouse
Need to go for newer firewall for the corporate web site
New change for corporate website
Network Change
close all the tasks
UnAssigned
Minor
Major
Standard
Significant

# Viewing Change Details

1. Log in to the ServiceDesk Plus application using your **user name** and **password**. This opens the ManageEngine ServiceDesk plus home page.
2. Click the **Changes** tab. This opens the changes list page.
3. Click the title of the change to view the change details. This opens the change details page. By default the change details page opens in the General tab.

## General Tab

The general tab shows general details of the change such as, Category, Technician, Status, Priority, Urgency, Type, Impact, Requester, Start Time, End Time, affected IT Services. The **Status** field holds the state of the change such as Requested, Approved, Implemented, Reviewed and Closed The approval status denotes whether the change is approved or rejected. The change will be considered as approved and listed in the change calender only if the **Approval Status** is 'Approved'. The approval status is given in non-editable mode.

Click the **Edit** button to edit all the details of the change. You also have inline edit option for all the details. To modify the details of the change click the details and choose the option from the combo box.

## Problems Tab

The problems tab shows the list of all the associated problems with the change. You have **Attach** option to attach the problem with the change. And the **Detach Problem** option to detach associated problem with the change.

## Incidents Tab

The incidents tab shows the list of all associated incidents with the change. You have **Attach** option to attach the incident with the change. And the **Detach Incidents** option to detach associated incidents with the change.

## Planning Tab

The planning tab shows the planning phase of the change on how to go about the change. It shows the **Impact details, Roll Out, Back Out plan** and finally the **Check List** for the plan.

## Approvals Tab

From the Approvals tab, the administrator can **Add CAB Members** and **Send the change for Recommendation** to the CAB members. Thus it helps to show the approval status of the change. Refer

## Implementation Tab

Implementation page shows the task details of the change and the work log details of the change. You can also add, edit and delete new **Task** and new **Work Log** details.

## Review Tab

From the review tab you can add post change assessment details or the evaluation results on how the change is made details are specified. It is basically a recap of the change.

To add review details Click the **Add** button. This opens the review text box.

Specify the details in the text box and **Save** the details. You can see review details getting displayed under the title. And the name of the person who entered the details with date and time will be displayed on the right hand side of the page.

To edit the review details click the **Edit** button next to the title. Edit the details and save the changes.

If you would like to attach a file on the review details of the change, click Attach a File option and attach files.

## History Tab

The **History** tab shows the change history from the time of its creation. It shows all the actions performed in the change. The history tab also shows the incidents and the changes associated to the problem on clicking the **Property View** link available on the right hand side. 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 Change

To edit the change available in the ServiceDesk Plus,

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the changes tab in the header pane. This opens the changes list view page.
3. Click the **Title** of the change to be edited. This opens the **change** details page which list the **Tasks** that can be performed on the change.
4. Click the **Edit** link on the top of the page to modify the change details. This opens the **Edit change** page. From this page you can add status of the change from open to close, and also change the entire template to a new one apart from the regular editing of the change details.

Alternatively, you also have an inline edit option to modify the change details in the view change page. Click the edit icon on the right side of each block which opens the change 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 **change Details** one by one.

## Modifying the Change Details

In the editable change form you can change the change details, such as **Status** of the change as **Closed or Open**, **Impact** details, **Urgency, Priority and Change Type** details. You can also modify **affected IT Services** and **Assets Involved** in the change.

## Modifying Owner Details

You can modify the **Requested by** details and **Technician** details of the change. You can also edit the **Scheduled Start Time** and **Scheduled End Time** of the change.

## Modifying the Change Category

You can change the **Category, Sub Category** and **Item** of the change. If the same was not appropriately chosen at the time of submitting then the change can be selected now from the drop down list.

## Modifying the Change Description

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

## Appending Attachments

If you wish to attach more files to the change, 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 change by clicking the delete icon available beside the attachment.

# Printing Change

To print a change,

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the Changes tab in the header pane.
3. Click the **Title** of the change you would like to print.
4. Click the **Print Preview** link on the right side **Tasks** block.

   In the print preview page you can view the Impact Analysis, Roll Out Plan, Back Out Plan, Checklist and Review. Then the Change details, Approval status and Notes and their attachments.

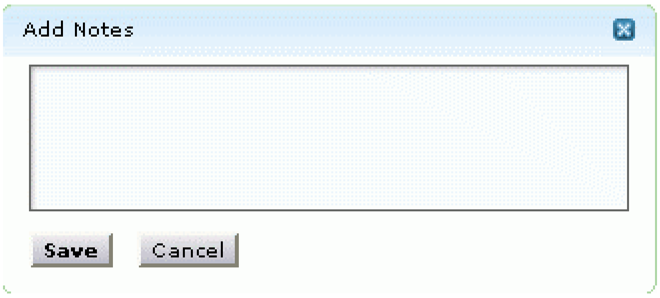
5. The print preview page of the change opens in a pop-up window. Click the **Print** menu item from the browser **File** menu.
6. The default printer associated with your workstation is invoked. Set the required options and click **OK**. You can collect the printed copy of the change at the printer that is linked to your workstation.

# Adding Notes

If you would like to add additional information including technical information based on your observations to a particular change, then you can **Add Notes** to that change. You can also use it to update the status of the change. These notes cannot be added by the requesters. The requesters can only view the notes.

To add a note to the change,

1. Log in to the ServiceDesk Plus application.
2. Click the **Change** tab in the header pane.
3. Click the **Title** of the change to which you would like to add a note. This opens the change details page.
4. Click the **Add New** combo box -> Select **Note** option. This opens **Add Notes** page as shown below,




5. Enter your content in the text box. These notes will be added to the change only by the technicians. The requesters will not be able to add the notes. **These notes are public.**
6. **Save** the details. The note is added at the bottom of the change along with a date and time stamp. The name of the person who added the note will also be displayed.

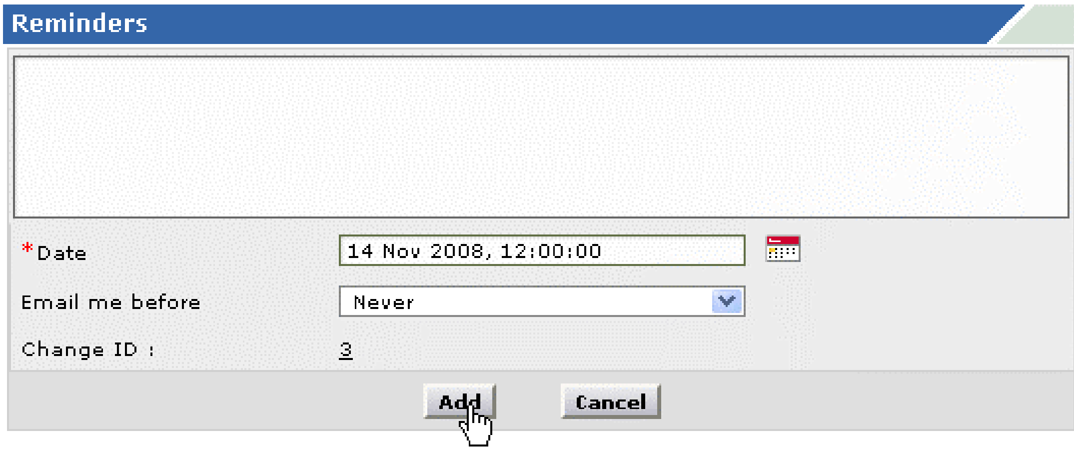
   You can also add any number of notes to a change. The added notes will be displayed in the descending order with recently added note first. You can also edit or delete the notes that have been added.

# Adding Reminders

You can add reminders to the changes using this option. All the pending tasks specific to the change can be added as reminders. The technician can add these task list as a personal reminder to himself/her. On adding these reminders they get displayed in **My Reminder(s)** under **Quick Actions**.

To add reminders,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Changes** tab in the header pane. This opens the changes list page.
3. Click the **Title** of the change from the list. This opens the change details page.
4. Click on the **Add New** combo box on the top right side of the page. Click the **Reminder** link. This opens the Reminders page. Specify the content in the given text field.
5. Select the reminder **Date** and **Time** by invoking the calendar icon.
6. To be reminded of the task in advance, select the time from the **Email me before** combo box.
7. The change id is shown in non editable mode.
8. Click **Add** button to add the reminder. You can see the reminder getting listed in the **My Reminder(s)** pop up window in ascending order.

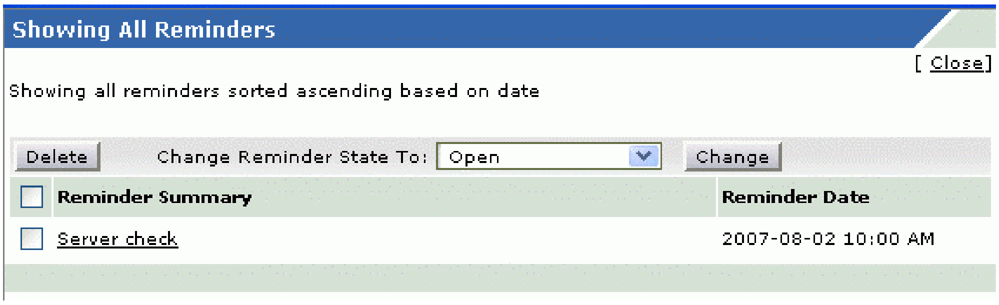


# Viewing Reminders

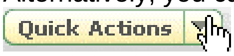
You can view the reminders specific to each change.

To view reminders,

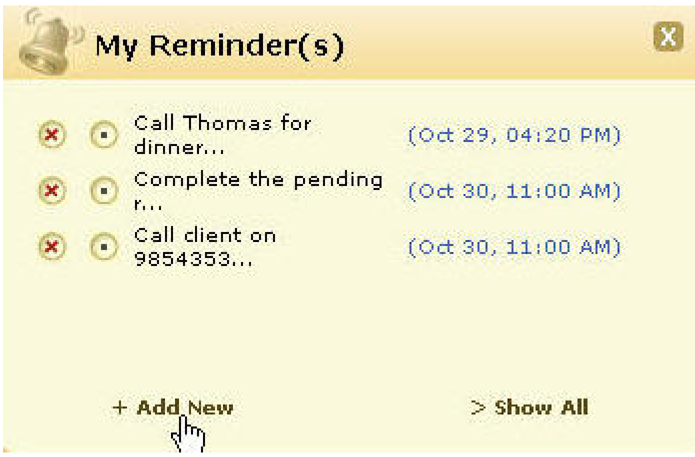
1. Log in to the ServiceDesk Plus application using your **user name** and **password**. This opens the ManageEngine ServiceDesk plus home page.
2. Click the **Changes** tab. This opens the changes list page.
3. Click the title of the change for which you like to view the reminder. This opens the change details page.
4. Click the Actions tab -> Click the **View Reminders** option. This opens the **Showing All Reminders** page as shown below. This lists all the reminders in ascending order based on the date.




5. Once the task is completed you can change the state of the reminder from open to completed. To do this, select the **reminder** to be closed from the list by enabling the check box on the left side of each reminder.
6. Select the **Change Reminder State To** Completed then -> click **Change** button to change the state. You can see the reminder striked off to indicate the change.

Alternatively, you can also view the reminders by, clicking **Quick Actions** link 

-> **My Reminder(s)** option under the Reminders block. This opens the **My Reminders** pop up window as shown below. This shows all your reminders irrespective any specific module.



You can also add new reminders by clicking **+Add New** link at the bottom of the my reminders form. 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.

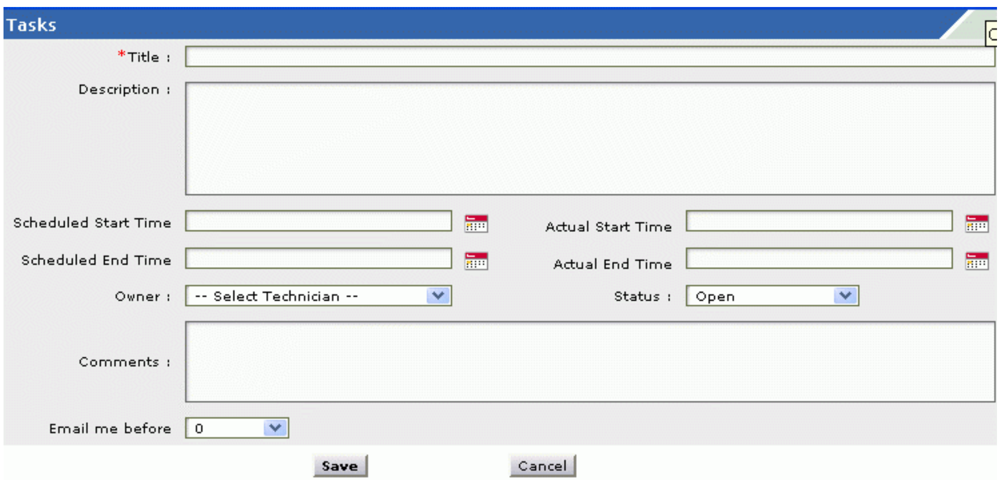
You can also delete the task by clicking the delete icon beside the task.

# Adding Tasks

Using add tasks option you can assign different tasks to different technicians. Say if a change is reported by the requester the change might involve multiple technicians work. The change owner (manager) whoever received the change can assign different tasks to the different technician.

To add tasks,

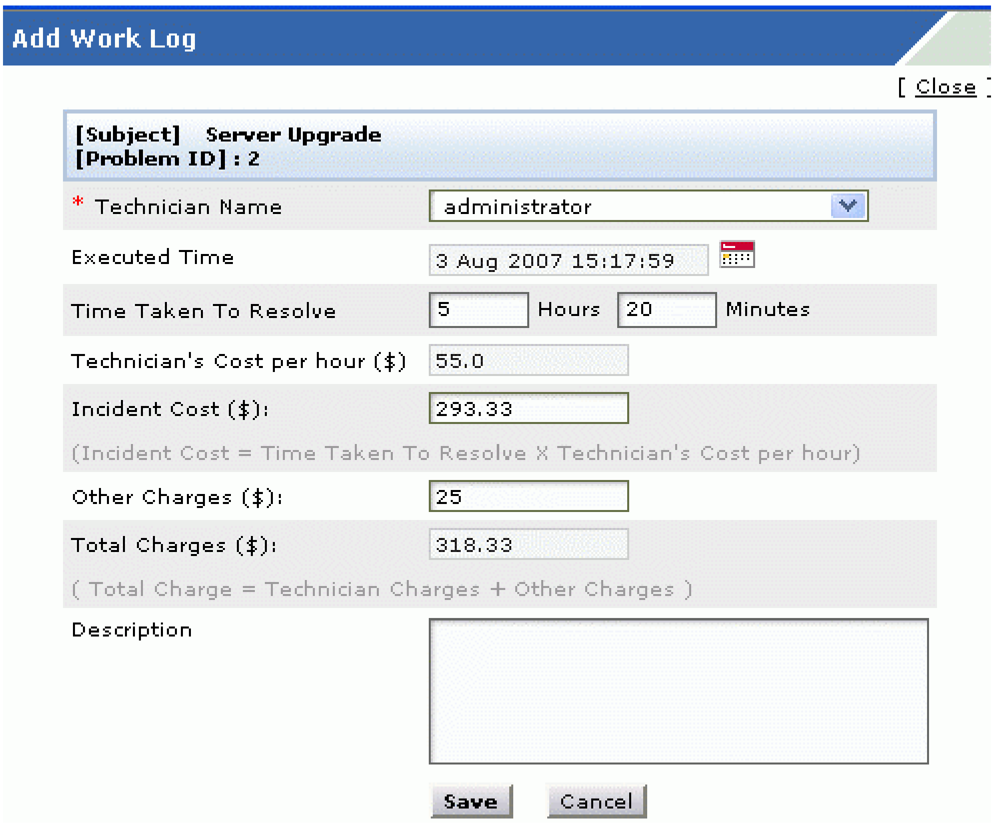
1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Changes** tab in the header pane.
3. Click the **Title** of the change to which you would like to add tasks.
4. Click the **Add New** menu -> select **Tasks** option. This opens the **Tasks** window.
5. Specify 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 from the calendar button. Also select the **Scheduled End Time** for the task from the calendar button.
8. The **Actual Start Time** and **End Time** of the task will be entered by the technician doing the task.
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 **Email me before** option and select the number of days from the combo box.
13. **Save** the values. You can see the tasks getting displayed in the Implementation tab. All the tasks created for the change will be listed under the implementation tab under the Task Details title in descending order. The tasks assigned to other technicians can be viewed in their **Task summary list** in the home page.



# Adding Work Logs

You can enter the technicians **time spent** details for the change using this option. The total time spent will exclude the time that the change was kept on hold. It takes the time of creation to the change was closed.

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Changes** tab. This opens the changes list page.
3. Click the title of the change for which you like to enter the work log. This opens the change details page.
4. Click the **Add New** combo box -> Select **Work Log** option from the list. This opens the **Add Work Log** page
5. Select the **Technician Name** from the combo box.
6. Specify the **Executed Time (**date & time) taken to resolve the change from the calender button.
7. The **Technician Cost per hour** will be fetched automatically from the technician details, which is a non-editable field. If you have already entered the per hour cost of the technician while adding the technician details, then the details will be fetched automatically. If you wish to change these values, you can do so manually.
8. The **Incident Cost** will be automatically calculated taking the (total time spent to resolve the problem * Technician's cost per hour).
9. If there are any extra charges specify in the **Other Charges** field.
10. Using the above two data the **Total Charges (Technician Charges + Other Charges)** will be displayed automatically.
11. Specify any relevant information about the time spent in the description field.
12. **Save** the details.

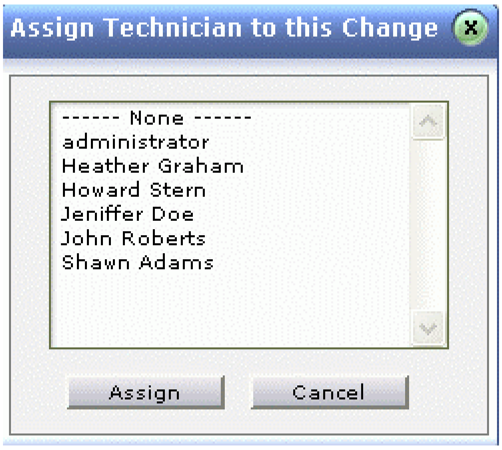


# Assigning Technician to a Change

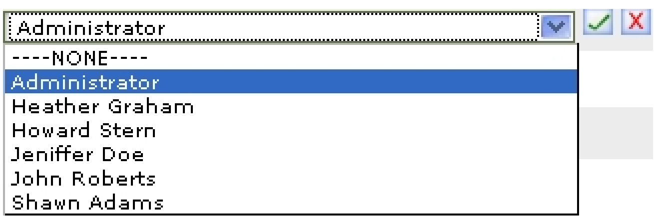
Each change will be handled by a technician, who would be responsible for closing the change.

To assign a technician,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Change** tab in the header pane. This opens the **Changes** list page.
3. Click the **Title** of the change for which you have to assign a technician. This opens the change details page.
4. Click the **Actions** combo box on the right hand side of the page ->Click **Assign Technician** option from the list. This opens **Assign Technician to this Change** pop up page as shown below. Select the technician from the list and **Assign** the change to the technician.



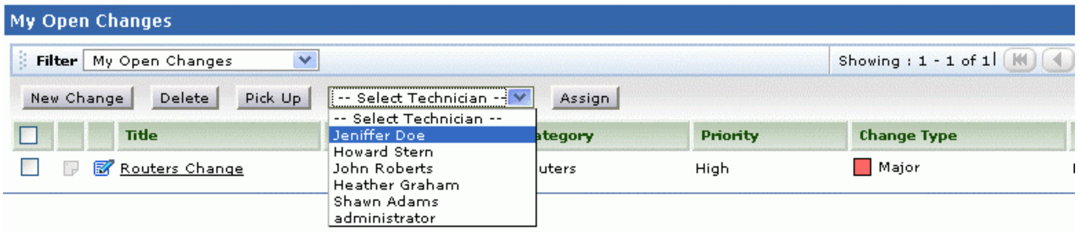

5. Alternatively, you can also assign technician using inline edit option. Click the technician name shown in the change details block. This opens the drop down box as shown below. Select the technician from the list and click the icon to select the technician name else click cancel icon.




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

To bulk assign changes to technicians

1. In the **Changes** list page, select the changes to be assigned a technician by enabling the check box beside left side each of the change title.




2. Click the **Select Technician** check box. Select the technician from the drop down list.
3. **Assign** the technician**.**

## Picking Up Change

ManageEngine ServiceDesk Plus provides an option to the technicians to self-pick up change. If there are unassigned changes, the technicians can pick up any of the unassigned changes from the list. This in turn will increase the turnaround time and the efficiency of the IT help desk team.

To pick up changes,

1. From the change list view page, select the changes you would like to pick up by enabling the check box. The unassigned changes will be in bold font.
2. Click **Pick up** button. The selected change will be assigned to you. **(Or)**
3. You can also pick up changes after viewing the change details. Click the title of the change to open **View Change** page.
4. Click **Assign** tab. Select **Pick Up** option to pick up the change.

# Closing Change

To close a change,

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

***<u>Note:</u>*** If the mandatory fields are not entered then an error message is shown asking you to enter the value in the fields.

## To reopen the change

You can reopen a changes from the closed state to open state. To do this,

1. Click the title of the change. This opens the change details page.
2. Click the Edit button. This opens the form in the editable format.
3. Change the status field from **Completed** to **Requested** and save the changes made.

   When a changes is opened from the closed state, you should change the **Created Time, Scheduled Start time and End time** of the change. When the request is finally closed, the **completed Time** will be automatically updated.

**(OR)**

4. Click the Status of the change in the form you have inline edit option for each of the change details. This opens the combo box as shown below,


6. Select the status from the list and immediately the status of the change get's updated.

## To view the closed changes

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

# Deleting Change

You have an option to delete individual change or group of changes together.

To delete individual changes

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Changes** tab in the header pane.
3. Click the **Title** of the change to be deleted in the changes list view page. This opens the **Change Details** page.
4. Click the **Actions** combo box on the top right hand side of the page.
5. Click the **Delete** link from the list. A dialog pops up asking you to confirm on the delete process.
6. Click **OK** to proceed. You can see the change deleted from the list.

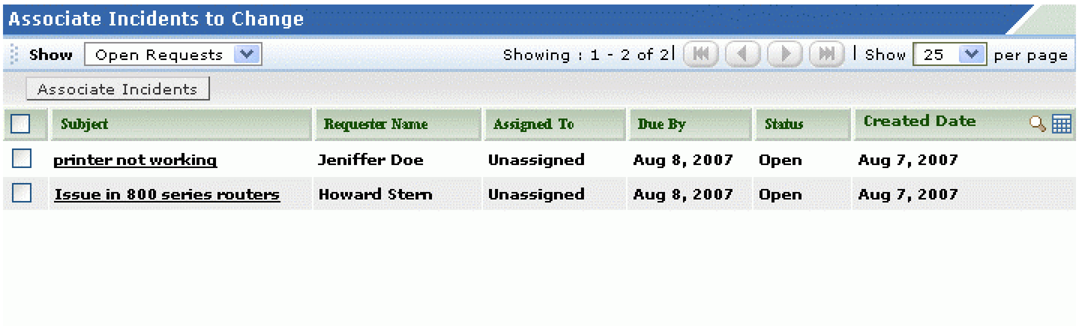
To delete more than one change at a time

1. In the Change list view page, select the changes to be deleted by enabling the check boxes.
2. Click the **Delete** button. A dialog pops up asking you to confirm on the delete process.
3. Click **OK** to proceed. Or click **Cancel** to abort deletion.

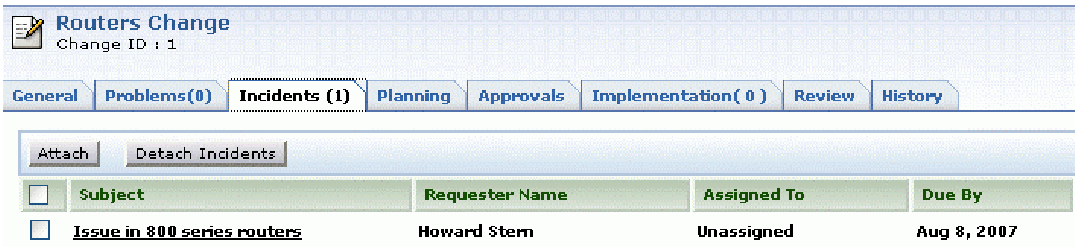
# Associating Incidents to a Change

You have an option to associate Incidents with the change. Similar Incidents as in Change can be associated in order to complete the requests quickly rather than doing it one by one.

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Changes** tab. This opens the **Change List View** page. Click the change title to be associated with the Incidents. This opens the change details page.
3. Click the **Actions** combo box on the top right side of the page. Click **Associate Incidents** option. This opens **Associate Incidents to Change** page as shown below,




4. Select the type of requests to be displayed by selecting from the **Show** combo box on the top left hand side of the page. Ex: Open Requests or All Requests and so on. On selecting the request type the corresponding requests gets listed.
5. Select the change from the list by enabling the check box beside each change.
6. Click **Associate Incidents** to associate respective requests to the change (particular selected change). The associated incidents gets listed in the Incidents tab in the change details page as shown below,



# Associating Problems to a Change

You have an option to associate problems with the change. Similar problems as change can be associated in order to complete the requests quickly rather than doing it one by one.

To associate problem,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Changes** tab. This opens the **Change List View** page. Click the change title to be associated with the problems. This opens the change details page.
3. Click the **Actions** combo box on the top right side of the page. Click **Associate Problems** option. This opens **Associate Problems to Change** page as shown below,
4. Select the type of problems to be displayed by selecting from the **Show** combo box on the top left hand side of the page. Ex: Open Problems or All Problems and so on. On selecting the problem type the corresponding problems gets listed.
5. Select the change from the list by enabling the check box beside each change.
6. Click **Associate Problems** to associate respective problems to the change (particular selected change). The associated problems gets listed in the Problems tab in the change details page.

# Publishing Announcements

ServiceDesk Plus gives you an option to publish announcements while doing the change without breaking the work flow. Say if you have to make an announcement to the company that the mail server will be down for next five hours and your are doing the change then in this case you need not go to the home page and make an announcement. You can directly publish the announcement from the change module.

To Publish Announcements,

1. In the Problem Details page click the **Actions** combo box and select the **Make an announcement** option. This opens the **Add New** page.
2. Specify the **Announcement Title** in the given text field. This is a mandatory field.
3. Specify any relevant information about the announcement in the **Description** field. Also specify the result under the **Resolution** title.
4. Specify the date and time to **Show this announcement, between these dates** from the calender button. If this field is not entered the announcement will be displayed in the dashboard for ever.
5. Select the check box to **Show this announcement only to technicians** .
6. Select the check box to **Send this announcement as mail** .
7. **Save** the changes. You can see the announcement page as shown below. To view the next and previous announcement in the dash board click the **Next** and **Previous** buttons on the right side of the page.


You can also edit and delete the announcement in the same page.

To edit the announcement,

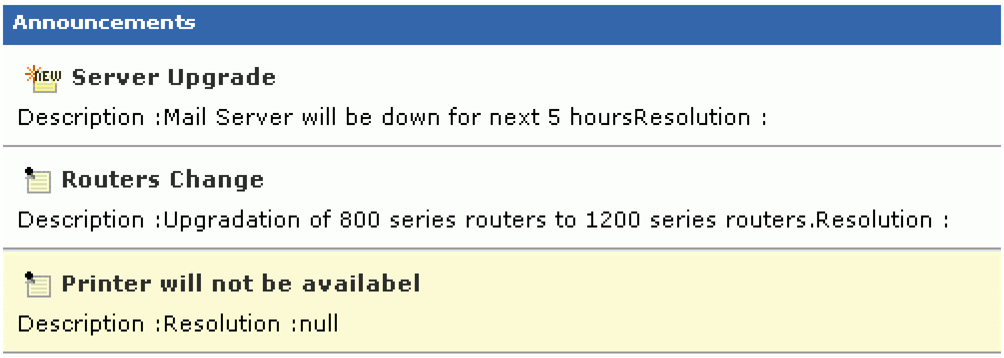
1. Click **Edit** button. This opens the Edit Announcement form.
2. Change the details of the announcement in form.
3. **Save** the changes. All the changes made in the announcement will be saved.

To delete an announcement,

1. To delete the announcement click **Delete** button. A dialog pops up asking you confirm on the delete operation.
2. Click **OK** to delete. Or click **Cancel** to retain the announcement.

Alternatively you can also publish announcements company wide or just to the technicians group from the **Home page.** The announcements are displayed just below the my view requests tab in the home page as shown below,

All recent announcements will be displayed first based on the date. To view all the announcements (even completed ones), click the **Show All** button on the right side of the page.




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 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.

# Send Notifications

To send notifications specific to the change to the CAB members, to change managers, technicians or to any concerned person then,

1. Log in to ServiceDesk Plus application using your user name and password.
2. Click the **Changes** tab in the header pane. This opens the change list view page.
3. Click the title of the change to which the notification has to be sent. This opens the change details page.
4. Click the **Actions** combo box and select the **Send Notification** link. This opens the **Send Notification** page.
5. Specify the **To** and **CC** address in the given text field.
6. Specify the **Subject** of the notification in the given text field.
7. Specify relevant information about the notification in the **Description** field.
8. **Send** the notification.

# Change Planning

The change plan is formulated to get started with the change process. It needs to have complete details about the reasons for considering the change that how this change can impact the business. The change planning stage needs to have following information so that change managers and CAB has all the details to make informed decisions.

- Impact Analysis - Risk involved in implementing the change.
- Rollout Plan - How the plan will be implemented.
- Back Out Plan - Plan to restore things back to original state if plan fails.
- Checklist - List of mandatory items required for the plan to succeed.

To specify the change plan,

1. Log in to ServiceDesk Plus application using your user name and password.
2. Click the **Changes** tab. This opens the Change List view page. Click the title of the change for which you need to plan to make decisions. This opens the change details page.
3. Click the **Planning** tab. You can view the change planning stages one below the other.

### To add the Impact details,

1. Click the **Add** button. You can see the text area getting displayed for the impact details.
2. Specify the risk involved in implementing the change in the given text area.
3. **Save** the details. You can see the details getting displayed.
4. Click **Attach File** button to attach a file for the impact details. The maximum size of the attachment should be 10MB.

### To specify the Roll Out Plan

1. Click the **Add** button. You can see the text area getting displayed for the roll out plan.
2. Specify how the plan will be implemented in the given text area.
3. **Save** the details. You can see the details getting displayed below the title.
4. Click **Attach File** button to attach a file for the impact details. The maximum size of the attachment should be 10MB.

### To specify the Back Out Plan

1. Click the **Add** button. You can see the text area getting displayed for the back out plan.
2. Specify the plan to restore things back to original state if plan fails in the given text field.
3. **Save** the details. You can see the details getting displayed below the title.
4. Click **Attach File** button to attach a file for the impact details. The maximum size of the attachment should be 10MB.

### To enter the Checklist

1. Click the **Add** button. You can see the text area getting displayed for the check list.
2. Specify the list of mandatory items required for the plan to succeed in the given text field.
3. **Save** the details. You can see the details getting displayed below the title.
4. Click **Attach File** button to attach a file for the impact details. The maximum size of the attachment should be 10MB.

# Recommending Change by CAB

The Change Advisory Board (CAB) is a body that exists to recommend changes and to assist Change Management in the assessment and prioritise of changes. As and when a CAB is convened, its members should be chosen who are capable of ensuring that all changes are adequately assessed from both the business and technical viewpoint. A technician or a requester can be a CAB member based on the organization structure.

**General Work Flow for approving a change**

- The CAB should be convened for a change. The CAB members can differ for each change. The CAB member can be a requester or a technician whoever is capable to asses from both the business and technical viewpoint.
- Once the CAB is convened the change should be sent to the CAB members for recommendation.
- The technician whoever receiving the change or assigned a change will be the owner of the change and he will send the change for recommendation to the CAB.
- If the change is recommended by the CAB members, the CHANGE MANAGER should approve the change. The change manager can approve or reject the change irrespective of the recommendation of the CAB.
- Only the approved change will be taken further by the technician to take necessary steps.

**To add CAB members and send for recommendation,**

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Changes** tab. This opens the Change List view page.
3. Click the **Title** of the change which you need to send for recommendations. This opens the change details page.
4. Click the **Approvals** tab. You have to add CAB members, and send the change for recommendation. The **CAB members** has the authorization to recommend the change.

## To Add CAB Members

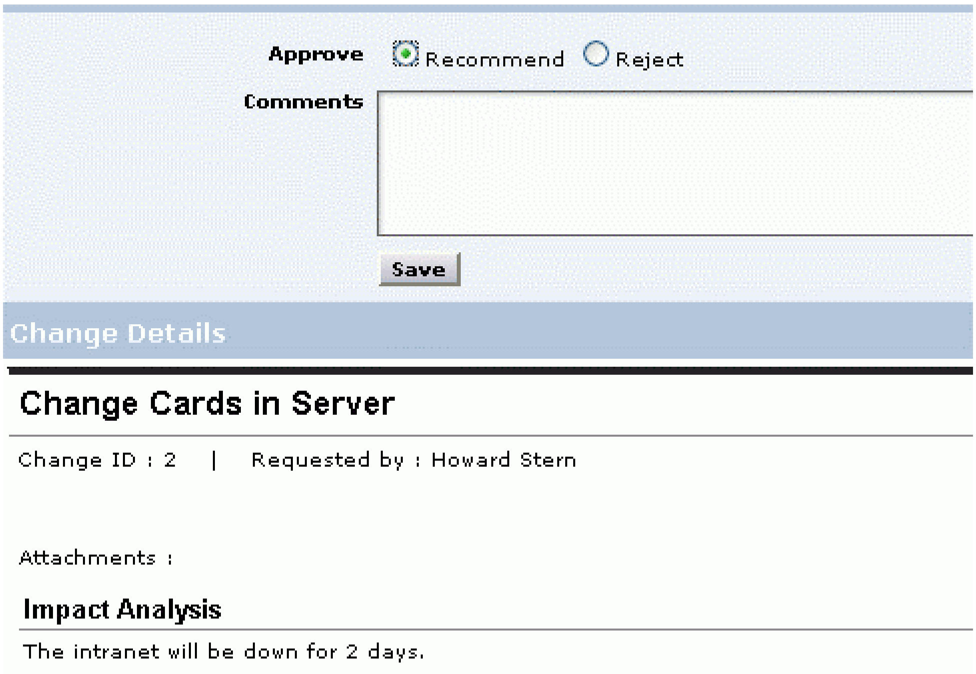
5. Click the **Add CAB Member** button.
6. Select the CAB from the combo box.
7. Select the members list for the committee. The selected members will be responsible for approving the changes.
8. Save the changes. You will get a confirmation message saying members added to the CAB successfully.

## Send the change for Recommendation

9. Click **Send for Recommendation** button to send the change for approval to the CAB members. Only the members of the CAB can recommend a change. This opens the submit change for approval page.
10. If the e-mail id is already configured for the CAB members then the Id would get automatically get listed in the **To** text field. This is a mandatory field. If the mail id is not configured refer Configuring Technicians.
11. Specify the Subject in the given text field. This is a mandatory field.
12. Specify the **Description** about the change in the given text field.
13. **Send** the mail to the CAB members for approval. Once the mail is sent the CAB members would get a mail with the link to the form to approve the changes as shown below.

Administrator has requested your recommendations for this Change - Change Cards in the Server. Click here to view Change details
http://shawnadams/approval/Approve.jsp?ITEMID=2&MODULE=Change&KEY=21187331524593&USERID=4

14. Click the link in the mail to open the form as shown below,




15. Select **Approve Recommend** or **Reject** radio button based on the change details listed below the form.
16. Specify the **Comments** in the given text field.
17. **Save** the changes.

## Recommending the change directly from the Approval page

If you are a member of the CAB after logging into ServiceDesk Plus, you can recommend the change from the Approval page directly by clicking the Take Action icon under the Recommendation title as shown below.


This opens the Approve page. **Recommend or Reject** the change.

Specify the **Description** and **Save** the changes. The status of the change becomes recommended.

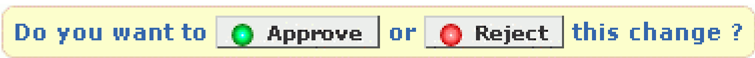
# Approving Change by the Change Manager

Only the Change Manager has the authority to approve the change. Any technician with the SD change manager role permissions can approve the change.  A change manager can or could not be a member of the CAB. If needed the change manager can reject the change though the change is recommended by the CAB members. It is to the change manager's discretion whether to approve or reject the change.

Once the change is recommended by the CAB members the Change Manager should **Approve or Reject** the change. Except for the Standard Change type all other change type should be approved the change manager. The standard change type is a pre-approved change type hence it does not require any approval from the change manager. Only the approved changes will be taken further to solve the issue.

## To Approve the Change by the Change Manager,

1. Log in into ServiceDesk Plus using your user name and password.
2. Click the Changes tab -> click the title of the change to be approved. This opens the change details page.
3. Click the **Approvals** tab, you get a link on the top right hand side of the page to approve or reject the change as shown below,




4. Click the **Approve link** to approve the change. This opens a dialog box.
5. Specify the comments in the box and **Save** the details.
6. Text in the link changes as Approved with the change manager name, date and time will also be displayed as shown below. At any time to reject the change, you can click the reject link next to the approve link.


In the change details page Approval status of the change would show as **Approved** in a non editable format. Also on the top right hand side of the page the Approval status of the change would change as Approved.

# Assets

ManageEngine  ServiceDesk Plus helps to manage all your IT and Non-IT assets. ServiceDesk Plus offers a single view to track and manage all your assets with ServiceDesk Plus, you can track and manage ownership of

- IT, Non-IT and Asset Components.
- Software Asset Management

## IT & Non-IT Asset Management

ServiceDesk Plus helps you to manage,

- IT assets such as, workstations, switches, routers, printers, and access points
- Non-IT assets such as basic fixtures, furniture, chairs, tables, projectors, and desk phones
- Asset Components such as keyboards, software, software licenses and even your printer inks.

## Software Asset Management

### Software License Management

ServiceDesk Plus helps you to manage software licenses installed across the enterprise. You can consolidate and manage all your software licenses from a single screen. ServiceDesk Plus will scan and automatically pickup license keys for Microsoft Windows and Microsoft Word. You can key-in all the licenses purchased earlier and track future purchase of software licenses through the Purchase module.

### Software Metering

ServiceDesk Plus helps you to track the usability of the installed software across organization. It gives the count of rarely used, frequently used and occasionally used software.

### Software Compliance

ServiceDesk Plus tracks purchased versus installed licenses helping you to ensure software license compliance. The scheduled scan alerts you when an unauthorized software installation is detected, ensuring software compliance on an on-going basis.

# IT Assets

All IP based assets are discovered under IT assets. The list of possible IT assets are given below,

- Workstations
- Laptops
- Printers
- Switches
- Servers
- Routers
- Access Points

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- Adding New IT Assets
- Editing Assets
- Adding Assets to Groups
- Assigning Assets to Department
- Modifying the State of the Assets
- Change log-in Credentials of IT Assets
- Bulk Scan of IT Assets
- Deleting Assets
- Importing Asset Details from CSV
- Viewing Asset Details
- Copying Resources
- Attaching Assets
- Attaching Components
- Attaching Documents
- Assigning Assets to Users/Departments/Assets
- Adding New Workstation
- Bulk Scan of Newly Added Workstations
- Changing Workstation as Server
- Viewing Workstation Details
- Print Preview of Workstations
- Modify Type
- Adding Software
- Deleting Workstations


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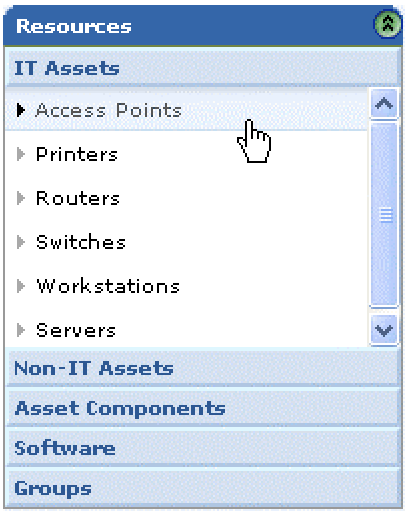
# Adding IT Asset

IT Assets other than workstations are configured under IT Assets. To add a new asset,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**. This opens the ManageEngine ServiceDesk plus home page.
2. Click on **Assets** tab in the header pane. This opens the Asset home page.
3. Click **Quick Actions** link 

on the top left hand side of the page -> Click **Asset** option from the drop down menu. (OR)

   Click **IT Assets** under Resources block on the left side of the page
4. 

-> Select any one of the listed IT assets link. e.g. Access points, printers etc. This opens the particular IT asset page.
5. Click **New** button. This opens Add Asset page.
6. Select the **Product Name** of the asset from the combo box. If required, you can add a new product name by clicking **Add New** link beside the product name field. This is a mandatory field.
7. Select the **Vendor Name** from the combo box. If required, you can add a new vendor by clicking the **Add New** link beside the vendor name text field.
8. Specify the **Asset Name** in the given text field. This is a mandatory field.
9. Specify the **Asset Tag, Asset Serial No, Bar Code, Asset Cost** in $ in the corresponding text fields.
10. Specify the **Acquisition Date & Expiry Date** from the calendar button.
11. Select the **Site** from the combo box.
12. Specify the **Location** in the given text field.
13. Specify the **Asset State** by selecting the current status of the asset from the combo box.

    If the asset is in **Use** state you need to associate or assign asset to department or user or asset.
    1. Allocate the asset to an **Asset** or to an **User** or to the **Department** by selecting any of the two radio button. Say Associate to Asset or Assign User/ or Department.
    2. If you choose to associate asset to an asset then select the asset name from the **Choose Asset** combo box. Or if you have chosen to assign to user or the department then select User or Department from the combo box.
    3. If the asset is leased select the check box Asset is **Leased**. If the asset is leased then specify the **From** and **To** date from the calendar button.
14. Click **Save** button to save the changes. To save and add another asset click **Save and add new button**.

# Editing Assets

To edit the resource details,

1. Log in to ServiceDesk Plus using your user name and password.
2. Click the **Assets** tab -> select the **IT Assets link** on the left hand side of the page. This opens the list view page of the IT assets.
3. Click the **title of the IT asset** to be edited. This opens the **Asset details** page.
4. Click **Edit** button on the top right hand side of the page (Or) click the **Actions** combo box next to the edit resource button -> select the **Edit** option. This opens the **Edit Asset** page.
5. Edit the Asset Details block such as **Product Name**, **Asset Name, Tag, Serial No, Bar Code, Vendor Name, Cost, Acquisition Date, Expiry Date, and Location.**
6. Modify the Asset State details such as, **Current usage status** of the assets like In Use, In Repair and so on. Then the **Associate** the asset to **User or Department** details or **Assign** to **User or Department** details.
7. **Update** the changes. You can see the assets details getting updated.

# Adding Assets to Group

You have two types of groups in ServiceDesk Plus say, **Static** group and **Dynamic**. Add to group option in asset list view page is to group bulk of assets. These assets will be grouped under the Static group by default.

To Add IT Assets to group,

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click any of the **IT Assets** link under the Resources block on the left hand side of the page. Select any one of the listed IT assets link. e.g. Access points, printers etc. This opens the particular IT asset page.
3. Select the assets to be added to the group by enabling the check box. Click **Actions** button -> **Add to Group** option. This opens the **Add Resource(s) to** page.
4. By default you can group assets only to the static group. Either to the **Existing static group** or **New static** group can be added.
5. If you would like to group the assets under **existing static group** then click the corresponding radio button. Select the **group name** from the combo box.
6. Else, if you would like to add a new static group and group the assets, click **New Group** radio button. Specify the **Group Name** and relevant information about the group in the **Description** field.
7. Click **Save** button to save the changes.

# Assigning Assets to Department / Site

**Assigning IT Asset to Department**

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the assets home page.
3. Select the **IT Assets** title under the **Resources** block. Select the corresponding IT Asset link say, servers, workstations and so on. This opens the selected **Assets list** view page.
4. Click on the **Asset Name** to be assigned to a **Department/Site** by enabling the check box.
5. Click the **Actions** menu -> select **Assign to Department** option from the list. This opens **Add Resource(s) to** pop-up window.
6. Select the **Department Name** from the combo box and **Save** the details.

**Assigning IT Asset to Site**

1. From the Asset list view page, click the **Actions** menu -> select **Assign to Site** option from the list. This opens **Assign Resource(s) to Site** pop-up window.
2. Select the **Site name** from the combo box.
3. **Save** the details. Else click **Cancel** button.

# Modifying State for IT Assets

To modify the state of IT Assets,

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the assets home page.
3. Select the **IT Assets** title under the **Resources** block. Select the specific IT Asset link. This opens the Assets list view page.
4. Select the assets to be modified of their status by enabling the check box. Click the **Actions** menu and select the **Modify State** option. This opens the **Modify State** pop up window.
5. Select the **State** from the combo box. For ex, In Store, In Use and so on.
6. **Save** the changes.

# Change log-in Credentials for bulk of IT Assets

You can change the log-in credentials for bulk of assets. You have **Global** credentials and **Local** credentials. Global credentials are common login permissions for all the assets. Local credentials are private login permissions for an asset (generally used to restrict the access permissions to everyone).

To change the login credentials,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the assets home page.
3. Click **IT Assets** under **Resources** block on the left hand side of the page. Select the respective IT assets link. e.g. Access points, Printers and so on. This opens the corresponding IT asset page.
4. Select the IT Assets to change the log-in credentials by enabling the check box. This opens the assets list view page. Click the **Actions** combo box --> and select the **Change Credentials** option. This opens the corresponding page.
5. Select either **Global Credentials** or **Local Credentials** by selecting the radio button.

**Global Credentials**

1. On selecting the global credentials, select the **Network** from the combo box.
2. Select the communication **Protocol** either SSH or Telnet option for linux workstations by enabling the corresponding radio button.
3. If you would like to **Scan Software in Linux Workstations** then enable the corresponding check box.
4. Specify the **User Name** and **Password** for the network.
5. **Save** the details. If you would like to **Save and Scan now** click the corresponding option.

**Local Credentials**

1. On selecting the local credentials, specify the **User Name** and **Password**.
2. Select the communication **Protocol** either SSH or Telnet option for linux workstations by enabling the corresponding radio button.
3. If you would like to **Scan Software in Linux Workstations** then enable the corresponding check box.
4. **Save** the details. If you would like to **Save and Scan Now** click the corresponding option.

# Bulk Scan of IT Assets

Scan now option is to scan group or bulk of assets for assets data. Each time when a new asset is added, instead of scanning all the assets, you can scan the newly added assets for resource details.

If you have changed the credentials for the assets or if you want to specify the log-in credentials for an asset then select the **Change Credentials** option under the actions menu and specify the details. Then click **Save and Scan now** button for scanning the assets.

**To scan bulk of IT Assets,**

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the assets home page.
3. Select the **IT Assets** title under the **Resources** block. Select the specific IT Asset link. This opens the Assets list view page.
4. Select the assets to be scanned by enabling the check box. Click the **Actions** tab -> select **Scan Now** option. This opens the Scan wizard page with total number of scanned and failed assets. And you can view the asset details in the Resource details page.

# Deleting Assets

1. Log in to the ServiceDesk Plus application using your **user name** and **password**. This opens the ManageEngine ServiceDesk plus home page.
2. Click on **Assets** tab -> Click **IT Asset** link under the resource block on the left hand side of the page. This opens the IT Assets list view page.
3. From the assets list view page, select assets to be deleted by enabling the check box.
4. Click **Delete** button to delete the selected assets. You can see the selected assets deleted from the list.

# Importing Asset details From CSV

ServiceDesk Plus helps you to import your asset details saved in CSV (Comma Separated values) format. If you have asset details in .XLS files, open it with Microsoft Excel and save it as .CSV files and then import it.

1. From the Assets view list page, click the **Import from CSV** link. This opens the **Resource Import Wizard** page.
2. Select the **Resource Category** from the combo box, IT or NON IT. This is a mandatory field.
3. Select the **Resource Type** from the combo box.

If you have selected **Non-IT** as resource category then the resource type would display components and assets. **(OR)** If you have selected **IT** as resource category then the resource type would display, **components and IT Assets. Under IT Assets you have** workstations and other IT-Assets. This is a mandatory field.

4. Locate the **.CSV file** using the **Browse** button.
5. Click on **Step2** button to go to the next page. Click Previous button if you need to go the previous page.
6. If you have selected the resource type as workstations then select the **Workstation details** from the combo box. Also specify the **Asset Details** by selecting from the combo box. The columns in .CSV file are populated in the select boxes beside each field label. Advent Net Manage Engine ServiceDesk Plus asset field's needs mapping with the field names from the .CSV file.
7. Map the **Workstation Name for workstation details**. For **asset details map the Product Type, Product Name, Asset Name** from the combo box. These are mandatory fields.
8. Map the Model, Tag, Manufacturer, Operating System and Domain details for the workstation details.
9. Map the Asset Tag, Asset Serial No, Bar Code, Vendor Name, Asset Cost, Warranty Expiry Date, Expiry Date, Location, Assigned to User, Assigned to Department from the combo box.
10. Map the Acquisition Date field with the relevant field in the .CSV file. Also map the order of the acquisition date i.e. date/month/year available in the .CSV file.
11. Click **Step3** to go the next page. Click Previous button if you need to go the previous page.
12. Click **Import Now** button to import the existing data from the .CSV file. Once the data is imported, you can see the Import Wizard page with result break-up.

# Viewing IT Asset Details

1. Log in to the ServiceDesk Plus application using your **user name** and **password**. This opens the ManageEngine ServiceDesk plus home page.
2. Click on **Assets** tab -> Click **IT Asset** link on the left hand side of the page. This opens the IT Assets list view page.
3. Click on the IT Asset name to view the IT Assets details. By default **Resource Info** tab details are displayed.

## Viewing Resource Info Details

**Resource Info** tab displays the Resource Details such as,Resource Name, Tag, Bar Code, Serial No Region, Cost, Acquisition Date and many other details are displayed.

## Viewing Relationships

This relationship tab shows the assets association to other Assets, Business Services, Users and Components.

On clicking the tab -> click the Add Relationship button on the top right hand side of the page.

**Connection Relationship**

1. Click the Connection Relationship option from the list. This opens the **Connection Relationship** page.
2. To connect the assets to other assets select the **Assets** radio button.
    1. Select the assets to be connected from the **Asset List**.
    2. Move the selected asset to the **Connected Assets list** using the >> button.
    3. Save the details. You can see the connected assets under the **Connected to Assets** block.
3. To connect the assets to the **Business Services** select the corresponding radio button.
    1. Select the business services from the list to be connected to the assets such as, Email, Internet Access and so on.
    2. Move the selected assets from the **Business Service** list to the **Connected Services** list using the >> button.
    3. **Save** the changes. You can see the connected business services under the **Business Services block**.

**Usage Relationship**

1. Click the Usage Relationship option from the list. This opens the Usage Relationship page.
2. Select the **Assign the asset to User/Department** radio button to associate the asset to the user/department.
    1. Select the **User** from the combo box.
    2. Select the **Department** to be associated from the combo box.
    3. If the **Asset is Leased** then select the corresponding check box.
    4. **Save** the changes. (Or)
3. Select the **Associate to Asset** radio button to assign the asset to the asset.
    1. Choose **Asset** to be associated from the combo box.
    2. **Save** the details.

**Container Relationship**

1. Click the Container Relationship option from the list. This opens the Container Relationship page.
2. Select the **Components** radio button to associate the components to the user. Select the type of components to be displayed in the list by selecting it from the choose product combo box.
3. Select the components from the **Components List** and move it to the **Attached components list** using >> button.
4. **Save** the details.

## Viewing History of IT Asset

Click on the **History tab** to view the IT Asset history. This gives the complete IT - Assets **Resource Ownership History on date and State of the components.**

## Request Details

On clicking the Request Details page you will be able to view all the requests raised for the asset.

On Clicking the request title you can view the details of the request, requester details, Assets belonging to the user, Time elapsed to solve the request, resolution for the request and history of the request

Also you can send reply for the request or forward the request to the technician. You can Search associated problem and change or add new problem or change to the request.

## Viewing Contracts of the IT Asset

Click on Contracts tab to view the contracts attached to the IT Asset. This gives the complete details about the contract such as, vendor name, support details, contract rules, expiry date, cost and other rules.

## Viewing Costs

1. Click on the Costs tab to view the costs associated to the IT Asset.
2. Click on **Add Cost** button at the right side of the page to add cost to the IT Asset.
3. Select the **Cost Factor** from the combo box. For ex. Service Cost. This is a mandatory field.
4. Specify the description about the cost in the **Description** field. Say if the cost factor is service cost you can specify important information about the service cost.
5. Specify the **Amount** in $ in the Amount field. This is a mandatory field.
6. Select the **Date** from the calendar button. This is mandatory field.
7. Click on **Add Cost** button to add the cost. You can see the cost added to the IT Asset shown in the Other Costs list view page.

# Copying Assets

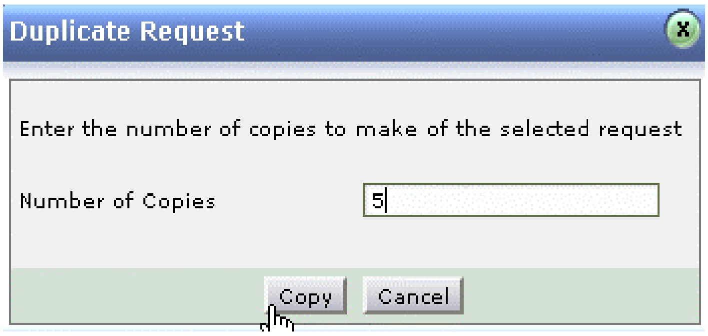
Using Copy Resource option you can make multiple copies of the resource and its details. On making multiple copies of the resource, it becomes easier for the technician to add bulk of similar assets. The technician need not manually enter all the resource details for each resource. The new copies of the resource will be assigned with new asset name and rest of the details is retailed as is.

**Example:**

If you have ten printers of the same configurations in your organization, then in this case, enter the configurations for one printer and save it. Then copy the same printer for ten times and add its configurations to other printers.

To make multiple copies of the Resources,

1. Click the **Assets** tab in the header pane. This opens the assets home page.
2. Click **IT Assets** under **Resources** block on the left hand side of the page. Select the respective IT assets link. e.g. Access points, Printers and so on. This opens the corresponding IT asset page.
3. Click the **Title** of the assets to be duplicated. This opens the Asset details page.
4. Click the **Actions** menu on the right hand side of the page. Select **Copy Resource** option. This opens the Copy Resource pop up window as shown below,




5. Specify the **Number of Copies** to be made for the resource in the given text field.
6. **Copy** the resource. You can see the list of resource copies listed in the list view.

# Attaching Assets

To attach assets to the IT Assets,

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the assets home page.
3. Select the **IT Assets link** under the Resource block on the left hand side of the page. Select the corresponding IT Asset link say, Printers, Access Points and so on. This opens the Asset list view page.
4. Click the title of the asset to be attached with an asset. This opens the asset details page.
5. Click the **Actions** combo box -> select the **Attach Asset** option from the list. This opens the **Attach Asset** pop up window.
6. If you would like to display the list of all assets or filter specific asset then select the assets to be displayed from the **List** combo box. Ex: Printer, Access Points and so on. Also select the type of asset such as asset in store, in use and so on from the **of type** combo box.
7. You have two columns, such as **Asset list** and **Attached Assets** list. You have to select the assets to be attached from the assets list and move it to the attached assets list using the **>>** button. To remove the assets from the attached assets list use the **<<** button.

   **Example:**
   If you would like to attach a printer to a workstation then select the list of assets to be attached from the assets list and move it to the attached assets list.
8. **Save** the changes. If you would like to detach all the attached assets then select the **Detach All** option.

# Attach Component

To attach components to an asset,

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane, this opens the assets home page.
3. Select the **IT Assets link** under the Resource block on the left hand side of the page. Select the corresponding IT Asset link say, Printers, Access Points and so on. This opens the IT asset list view page.
4. Click the **Title** of the asset to be attached with an component. This opens the asset details page.
5. Click the **Actions** combo box -> select the **Attach Component** option from the list. This opens the **Attach Component** pop up window.
6. If you would like to display the list of all components or filter specific components then select the components to be displayed from the **List** combo box. Ex: keyboard, mouse and so on. Also select the type of component such as component in store, in use and so on from the **of type** combo box.
7. You have two columns, such as **Component list** and **Attached Components** list. You have to select the components to be attached from the components list and move it to the attached components list using the **>>** button. To remove the component from the attached component list use the **<<** button.

   **Example:**

   If you would like to attach a keyboard and a mouse to a workstation then select the list of components to be attached from the component list and move it to the attached component list.

7. **Save** the changes. If you would like to detach all the attached components then select the **Detach All** option.

# Attach Documents

To attach documents,

1. Log in to ServiceDesk Plus using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the Asset home page.
3. Select **IT Assets** link under the resource block on the left hand side of the page. Select the corresponding IT Assets say, Printers, Routers and so on. This opens the IT asset list view page.
4. Click the Asset Name of the asset to which the document needs to be attached. This opens the **Asset details** page.
5. Click the **Actions** combo box on the top right hand side of the page -> select the **Attach Documents** option. This opens the **Attach File** pop up window.
6. Choose the file to be attached by clicking the **Browse** button. The maximum size of the attached file can be 10 MB.
7. Click **Attach File**. The attached document will be listed in Asset details page under Attached Documents. The attached file can be deleted by clicking the delete icon beside file name.

# Assigning IT Asset to User/Department/Asset

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the assets home page.
3. Select the **IT Assets** title under the **Resources** block. Select the specific IT Asset link. This opens the selected Assets list view page.
4. Click on the **Asset Name** to be assigned a user/department/asset. This opens the Asset details page.
5. Click the **Actions** menu on the right hand side of the page -> click **Assign** option from the list. This opens the Assign/Associate page
6. If you would like to assign the asset to user or department then, select **Assign User and or Department** radio button. Or if you would like to associate with an asset then select **Associate to Asset** radio button.

   **Assign User and or Department**

   1. On selecting this radio button, select the **User name and Department name** from the combo box.
   2. If the asset is leased then enable the **Asset is Leased** check box and specify the **From and To** date of the lease.

   **Associate to Asset**

   1. On selecting this radio button, **Choose the Asset** to be associated from the combo box.
7. **Save** the details.

# Add New Workstation

1. Log in to the ServiceDesk Plus application using your **user name** and **password**. This opens the ManageEngine ServiceDesk plus home page.
2. Click on **Assets** tab in the header pane. This opens the asset home page.
3. Click **IT Asset** link under the resource block on the left hand side of the page. Select the corresponding assets say, Printers, Routers and so on. This opens the Asset list view page. Click **New** button. (OR)

   Click on **Quick Create** 

tab on the top left hand side of the page -> click **Workstation** option. This opens the **Workstation Configuration** page.

**Computer Details**

4. Specify the **Name** of the computer in the name text field and select the **Model** of the workstation from the combo box. This is a mandatory field. **Ex: Latitude D620.**
5. Specify the **Service Tag & Manufacturer** of the workstation in the given text field.
6. Specify the **Processor Count, Processor Info, Clock Speed** and **Manufacturer** of the processor in the given text fields.
7. Specify the **RAM** and **Virtual Memory** in (MB) the given text fields.
8. Also specify the **Name** and **Service Pack** of the operating system in the corresponding fields.

**Resource Info Details**

9. Specify the resource info details such as, **Resource Tag, Resource Serial No, Bar Code** & **Location** in the given text fields.
10. Select the **Site** and **Vendor Name** of the workstation from the combo box.
11. Select the **Acquisition Date, Expiry Date & Warranty Expiry Date** from the calender button.

**Asset State Details**

12. Select the status of the asset from the **Asset State** combo box. **Ex:** In Store, In Use and so on

**Network Adapter Details**

13. Specify the network adapter details such as, **Network IP Address, MAC Address, NIC, Network, DNS Server name & Default Gateway** in the given text field.
14. Select the **Domain** name from the combo box.
15. If you would like to enable **DHCP** then select the check box.

**Input/Output Devices Details**

16. Also specify the input/output devices details of the workstation. Specify the **Monitor Type, Mouse Type, Keyboard Type** & their corresponding manufacturers in the respective fields.
17. **Save** the details. If you would like to **Save and Add New** workstation then click the corresponding button.

# Bulk Scan of Newly Added Workstation

Using this option you can scan a new workstation added to the domain for its hardware and software details. This is very useful when you have to scan a single or a set of newly added workstations. In such case you don't have to scan the entire domain for adding the workstations to the network.

**To Scan New Workstation,**

1. Click on the **Assets** tab in the header pane -> click the **Workstations** link under the **Resources** tab on the left side of the page. This opens Workstations list view page.
2. Select the **Workstations** to be scanned by enabling the check box -> Click the **New Scan** button next to the **Actions** menu. This opens the Scan Configuration page.
3. Specify the **Name/IP** of the workstation. This is a mandatory field.
4. Select the log-in credentials for the workstation by selecting either of the two radio buttons. Say **Global** or **Local** credentials. By default Global Credentials option will be selected.

**Global Credentials**

1. Select the **Scan type** from the combo box. Say **Domain mode or Network mode.**
2. Select the **Domain/Network** name from the combo box. This is a mandatory field.
3. Specify the **Login Name** and **Password** for the selected domain.

**Local Credentials**

1. Specify the local **Login Name** and **Password.**
2. Select the **Protocol** to connect it to the workstation by enabling either of the two radio buttons. Say SSH or Telnet.
3. If you would like to scan software in Linux workstation then select the corresponding check box.
4. Click **Scan** to scan the workstation. Else click **Cancel**.

# Changing Workstation As Server

You can change workstation as server,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the assets home page.
3. Click **IT Assets** under **Resources** block on the left hand side of the page. Click the **Workstations** link. This opens the workstations list view page.
4. Select the workstations name to be changed as server by enabling the check box.
5. Click the **Actions** menu and select the **Change as Server** option. This opens the **Modify Device Type** page as shown below,
6. Select the **Type** of the server from the combo box.
7. **Save** the details.

# Viewing Workstation Details

1. Log in to the ServiceDesk Plus application using your **user name** and **password**. This opens the ManageEngine ServiceDesk plus home page.
2. Click on **Assets** tab -> Click **Workstation** link under **IT Assets** title on the left hand side of the page. This opens the workstations list view page.
3. Click on the workstation name to view the workstations details. By default **Resource Info** tab details are displayed.

## Viewing Resource Info Details

**Resource Info** tab displays the Resource Details & Workstation Details. Resource details such as Resource Name, Tag, Bar Code, Serial No etc. Workstation details such as Computer Name, OS version, Service pack, Processor details, memory information and many other details are displayed.

## Viewing Hardware Details

Click **Hardware tab** to view the complete Hardware details of the workstation. The hardware tab is broadly divided in to four major blocks such as **Workstation Details** block, **Network Details**, **Discs and Drive Details, Printer Details** and **Other Details.**

Under the workstation block you can view computer system, operating system, processor, memory and installed memory details. Under network block you can view the network adapters details. Under disks and drives block you can view the hard disks, logical drives and physical drives details. The printer details can be viewed under the printer details block. Under other details block you can view the keyboard, mouse, monitor, multimedia, ports, USB controllers details.

## Viewing Software Details

Click **Software tab** to view the software details of the workstation. This opens the software details page with the list of all installed software's in the workstation. By default the list of All Software will be displayed.

Select the corresponding filter option from the Filter Viewing combo box. There are different status levels of the **software, such as Excluded, Managed, Prohibited, Freeware, Shareware and Unidentified.** You can select any of these status levels and filter the software's listed.

Click on the **software title** to view the software details such as, number of **licensed installations**, **number of unlicensed installations** and **number of Purchased licenses**.

If there are any **license violations a warning message is displayed saying: License Violation.** Software installations are more than purchased licenses.

## Viewing Relationships

This relationship tab shows the assets association to other Assets, Business Services, Users and Components.

On clicking the tab -> click the Add Relationship button on the top right hand side of the page.

**Connection Relationship**

1. Click the Connection Relationship option from the list. This opens the **Connection Relationship** page.
2. To connect the assets to other assets select the **Assets** radio button.
    1. Select the assets to be connected from the **Asset List**.
    2. Move the selected asset to the **Connected Assets list** using the >> button.
    3. Save the details. You can see the connected assets under the **Connected to Assets** block.
3. To connect the assets to the **Business Services** select the corresponding radio button.
    1. Select the business services from the list to be connected to the assets such as, Email, Internet Access and so on.
    2. Move the selected assets from the **Business Service** list to the **Connected Services** list using the >> button.
    3. **Save** the changes. You can see the connected business services under the **Business Services block**.

**Usage Relationship**

1. Click the Usage Relationship option from the list. This opens the Usage Relationship page.
2. Select the **Assign the asset to User/Department** radio button to associate the asset to the user/department.
    1. Select the **User** from the combo box.
    2. Select the **Department** to be associated from the combo box.
    3. If the **Asset is Leased** then select the corresponding check box.
    4. **Save** the changes. (Or)
3. Select the **Associate to Asset** radio button to assign the asset to the asset.
    1. Choose **Asset** to be associated from the combo box.
    2. **Save** the details.

**Container Relationship**

1. Click the Container Relationship option from the list. This opens the Container Relationship page.
2. Select the **Components** radio button to associate the components to the user. Select the type of components to be displayed in the list by selecting it from the choose product combo box.
3. Select the components from the **Components List** and move it to the **Attached components list** using >> button.
4. **Save** the details.

## Viewing History of workstation

Click on the **History tab** to view the workstation history. This gives the complete Workstation **Scan History and Resource Ownership History on date.**

## Request Details

On clicking the Request Details page you will be able to view all the requests raised for the asset.

On Clicking the request title you can view the details of the request, requester details, Assets belonging to the user, Time elapsed to solve the request, resolution for the request and history of the request

Also you can send reply for the request or forward the request to the technician. You can Search associated problem and change or add new problem or change to the request.

### Viewing Contracts of the workstation

Click on Contracts tab to view the contracts attached to the workstation. This gives the complete details about the contract such as, vendor name, support details, contract rules, expiry date, cost and other rules.

### Viewing Costs

Click on the Costs tab to view the costs associated to the workstation.

Click on Add Cost button to add cost to the workstation.

Select the Cost Factor from the combo box. For ex. Service Cost. This is a mandatory field.

Specify the description about the cost in the description field. Say if the cost factor is service cost you can specify important information about the service cost.

Specify the Amount in $ in the Amount field. This is a mandatory field.

Select the Date from the calendar button.

Click on Add Cost button to add the cost. You can see the cost added to the workstation shown in the Other Costs list view page.

# Print Preview of Workstation Details

You can view the preview of the workstation details in printable format.

To view the Preview of Workstation Details,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the assets home page.
3. Click **IT Assets** under **Resources** block on the left hand side of the page. Select the **Workstations** link. This opens the workstation details page.
4. Click the **Workstation Name** to view the preview of the workstation details. This opens the Workstation details page.
5. Click the **Actions** menu on the right hand side of the page. Select **Print Preview** option. This opens the **Resource Details** pop up window. You can view the complete resource details, workstation details, network details, disks & drives details, printer details, other details, software details, installed service packs details, resources attached details, workstations scan history details, resource ownership history details, contracts details & costs details.

# Modify Type

To Modify Device type,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the assets home page.
3. Click **IT Assets** under **Resources** block on the left hand side of the page. Select the Workstations link. This opens the workstation list view page.
4. Click the **Workstation Name** to be modified of the device type. This opens the Workstation details page.
5. Click the **Actions** menu on the right hand side of the page. Select **Modify Type** option. This opens the modify device type pop up window.
6. Select the device type from the **Modify Type** combo box.
7. **Save** the details.

# Adding Software

Using this option you can add multiple software to the workstation.

To add Software to the workstation,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the assets home page.
3. Click **IT Assets** under **Resources** block on the left hand side of the page. Select the **Workstations** link. This opens the workstation list view page.
4. Click the **Workstation Name**. This opens the Workstation details page.
5. Click the **Actions** menu on the right hand side of the page. Select **Add Software** option. This opens the **Add Software** pop up window.
6. Select the software from the list to be added to the workstation. You can select multiple software to be added to the workstation using ctrl or shift keys.
7. **Save** the details. Else **Close** the pop-up window.

# Deleting Workstations

1. Log in to the ServiceDesk Plus application using your **user name** and **password**. This opens the ManageEngine ServiceDesk plus home page.
2. Click on **Assets** tab -> Click **IT Asset** link on the left hand side of the page. This opens the IT Assets list view page.
3. From the Workstations view list page, select workstations to be deleted by enabling the check box.
4. Click **Delete** button to delete the selected workstations. You can see the selected workstation deleted from the list.

# Components

A part of the asset (ie. associated with the asset) which does not stand alone are grouped under components. The list of all possible components are given below,

- Keyboards
- Mouse
- Software's
- Software Licenses
- Printer ink

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- Adding Components
- Adding Components to Groups
- Deleting Components
- Viewing Components Details
- Edit Components
- Associate Assets
- Copy Resources
- Attach Documents

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# Adding Components

1. Log in to the ServiceDesk Plus application using your **user name** and **password**. This opens the ManageEngine ServiceDesk plus home page.

2. Click **Quick Actions** link  on the top left hand side of the page -> Click **Asset** option from the drop down menu. This opens Add Asset page. (OR)

   Click **Asset Components** under Resources on the left side of the page -> Select any one of the listed IT assets components link. e.g. Keyboards etc. This opens the particular Asset Component page.

3. Click **New button**. This opens Add Asset page.

4. Select the **Product Name** from the combo box. If required, you can add a new product name by clicking **Add New** link beside the product name field. This is a mandatory field.

5. Select the **Vendor Name** from the combo box. If required, you can add a new vendor by clicking the **Add New** link beside the vendor name text field.

6. Specify the **Asset Name** in the given text field. This is a mandatory field.

7. Specify the **Asset Tag, Asset Serial No, Bar Code, Asset Cost** in $ in the corresponding text fields.

8. Specify the **Acquisition Date & Expiry Date** from the calendar button.

9. Select the **Site** from the combo box.

10. Specify the **Location** in the given text field.

11. Specify the **Asset State** by selecting the current status of the asset from the combo box.

    If the asset is in **Use** state you need to associate or assign asset to department or user or asset.

    1. Allocate the asset to an **Asset** or to an **User** or to the **Department** by selecting any of the two radio button. Say Associate to Asset or Assign User/ or Department.

    2. If you choose to associate asset to an asset then select the asset name from the **Choose Asset** combo box. Or if you have chosen to assign to user or the department then select User or Department from the combo box.

    3. If the asset is leased select the check box Asset is **Leased**. If the asset is leased then specify the **From** and **To** date from the calendar button.

12. Click **Save** button to save the changes. To save and add another asset click **Save and add new button**.

# Adding Components to Group

You have two types of groups in ServiceDesk Plus say, **Static** group and **Dynamic**. Add to group option in component list view page is to group bulk of components. These components will be grouped under the Static group by default.

**To Add Components to group,**

1. Log in to ServiceDesk Plus application using your user name and password.
2. Click any of the **Components** link under the Resources block on the left hand side of the page. This opens the components list view page.
3. Select the components to be added to the group by enabling the check box. This opens the **Add Resource(s) to** page.
4. By default you can group components only to the static group. Either to the **Existing static group** or **New static** group can be added.
5. If you would like to group the components under **existing static group** then click the corresponding radio button. Select the **group name** from the combo box.
6. Else, if you would like to add a new static group and group the components, click **New Group** radio button. Specify the **Group Name** and relevant information about the group in the **Description** field.
7. Click **Save** button to save the changes.

# Deleting Components

1. Log in to the ServiceDesk Plus application using your **user name** and **password**. This opens the ManageEngine ServiceDesk plus home page.
2. Click on **Assets** tab -> Click **Asset Components** link under resource block on the left hand side of the page. This opens the components list view page.
3. From the components list view page, select assets to be deleted by enabling the check box.
4. Click **Delete** button to delete the selected assets. You can see the selected assets deleted from the list.

# Viewing Components Details

1. Log in to the ServiceDesk Plus application using your **user name** and **password**. This opens the ManageEngine ServiceDesk plus home page.
2. Click on **Assets** tab -> Click **Components** link under on the left hand side of the page. This opens the components list view page.
3. Click on the components name to view the components details. By default **Resource Info** tab details are displayed.

## Viewing Resource Info Details

Resource Info tab displays the Resource Details such as, Resource Name, Tag, Bar Code, Serial No Region, Cost, Acquisition Date and many other details are displayed.

## Viewing History of Components

Click on the History tab to view the components history. This gives the complete components **Resource Ownership History on date and State of the components.**

## Request Details

On clicking the Request Details page you will be able to view all the requests raised for the Component.

On Clicking the request title you can view the details of the request, requester details, Assets belonging to the user, Time elapsed to solve the request, resolution for the request and history of the request

Also you can send reply for the request or forward the request to the technician. You can Search associated problem and change or add new problem or change to the request.

## Contracts Details

Click on Contracts tab to view the contracts attached to the components. This gives the complete details about the contract such as, vendor name, support details, contract rules, expiry date, cost and other rules.

## Costs Details

1. Click on the Costs tab to view the costs associated to the components.
2. Click on **Add Cost** button to add cost to the components.
3. Select the **Cost Factor** from the combo box. For ex. Service Cost. This is a mandatory field.
4. Specify the description about the cost in the **Description** field. Say if the cost factor is service cost you can specify important information about the service cost.
5. Specify the **Amount** in $ in the Amount field. This is a mandatory field.
6. Select the **Date** from the calendar button. This is mandatory field.
7. Click on **Add Cost** button to add the cost. You can see the cost added to the components shown in the Other Costs list view page.

# Copying Resources

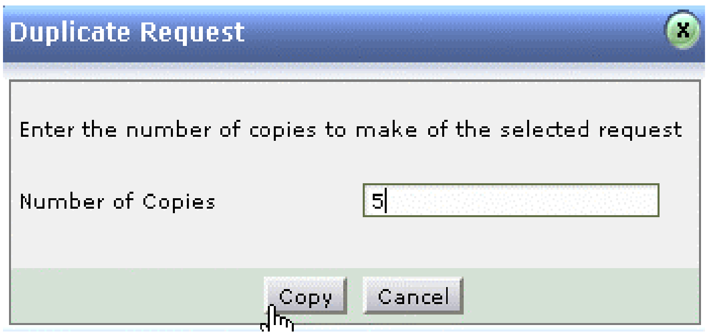
Using Copy Resource option you can make multiple copies of the component and its details. On making multiple copies of the resource, it becomes easier for the technician to add bulk of similar components. The technician need not manually enter all the components details for each component. The new copies of the component will be assigned with new component name and rest of the details is retailed as is.

**Example:**

If you have twenty keyboards of the same configurations in your organization, then in this case, enter the configurations of one keyboard and save it. Then copy the same keyboard for twenty times and add its configurations to other keyboards.

To make multiple copies of the Resources,

1. Log in to ServiceDesk Plus using your user name and password.
2. Click the **Assets** tab, this opens the asset home page -> select the **Asset Components link** on the left hand side of the page.
3. From the list view page of the **Asset Components** -> click the title of the asset component to be duplicated. This opens the asset components details page.
4. Click the **Actions** combo box -> select the **Copy Resource** option. This opens the **Copy Resource** page as shown below,




5. Specify the **Number of Copies** to be made for the resource in the given text field.
6. **Copy** the resource. You can see the list of resource copies listed in the list view.

# Editing Components

To edit the resource details,

1. Log in to ServiceDesk Plus using your user name and password.
2. Click the **Assets** tab -> select the **Asset Components link** under the resource block on the left hand side of the page. This opens the list view page of the asset components.
3. Click the **title of the Asset Components** to be edited. This opens the **Asset details** page.
4. Click **Edit** button on the top right hand side of the page (Or)

   Click the **Actions** combo box next to the edit resource button -> select the **Edit** option. This opens the **Edit Components** page.
5. Edit the Asset Details block such as **Asset Name, Tag, Serial No, Bar Code, Vendor Name, Cost, Acquisition Date, Expiry Date, and Location.** The Product Name cannot be edited as it is linked to the product list created by the technician.
6. Modify the Asset State details such as, **Current usage status** of the assets like In Use, In Repair and so on. Then the **Associate** the asset to **User or Department** details or **Assign** to **User or Department** details.
7. **Update** the changes. You can see the components details getting updated.

# Attach Documents

To attach documents,

1. Log in to ServiceDesk Plus using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the Asset home page.
3. Select **IT Assets** link under the resource block on the left hand side of the page. Select the corresponding IT Assets say, Printers, Routers and so on. This opens the IT asset list view page.
4. Click the Asset Name of the asset to which the document needs to be attached. This opens the **Asset details** page.
5. Click the **Actions** combo box on the top right hand side of the page -> select the **Attach Documents** option. This opens the **Attach File** pop up window.
6. Choose the file to be attached by clicking the **Browse** button. The maximum size of the attached file can be 10 MB.
7. Click **Attach File**. The attached document will be listed in Asset details page under Attached Documents. The attached file can be deleted by clicking the delete icon beside file name.

# Non IT Assets

All non IP based assets are grouped under Non - IT assets. The list of all possible non-it assets are given below,

- Projectors
- Scanners
- Tables
- Chairs
- Telephones

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- Adding Non-IT Asset
- Editing Non-It Asset
- Adding  Non-It Asset to Group
- Assigning bulk Non-It Asset to Department/Site
- Modify the State of Non-It Assets
- Delete Non-It Asset
- Viewing Non-It Asset Details
- Assigning Non-It Asset to Users and/or Department
- Copy Resources
- Attach Asset
- Attach Component
- Attach Documents

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# Adding Non-IT Asset

1. Log in to the ServiceDesk Plus application using your **user name** and **password**. This opens the ManageEngine ServiceDesk plus home page.

2. Click on **Assets** tab -> Click **Quick Actions** 

on the top left hand side of the page -> Click **Asset** option from the drop down menu. This opens Add Asset page. (OR)

   Click **Non-IT Assets** under Resources on the left side of the page -> Select any one of the listed Non-IT assets link. e.g. Projectors, Scanners. This opens the particular Non-IT asset page.

3. Click **New** button. This opens Add Asset page.

4. Select the **Product Name** of the asset from the combo box. If required, you can add a new product name by clicking **Add New** link beside the product name field. This is a mandatory field.

5. Select the **Vendor Name** from the combo box. If required, you can add a new vendor by clicking the **Add New** link beside the vendor name text field.

6. Specify the **Asset Name** in the given text field. This is a mandatory field.

7. Specify the **Asset Tag, Asset Serial No, Bar Code, Asset Cost** in $ in the corresponding text fields.

8. Specify the **Acquisition Date & Expiry Date** from the calendar button.

9. Select the **Site** from the combo box.

10. Specify the **Location** in the given text field.

11. Specify the **Asset State** by selecting the current status of the asset from the combo box.

    If the asset is in **Use** state you need to associate or assign asset to department or user or asset.

    1. Allocate the asset to an **Asset** or to an **User** or to the **Department** by selecting any of the two radio button. Say Associate to Asset or Assign User/ or Department.

    2. If you choose to associate asset to an asset then select the asset name from the **Choose Asset** combo box. Or if you have chosen to assign to user or the department then select User or Department from the combo box.

    3. If the asset is leased select the check box Asset is **Leased**. If the asset is leased then specify the **From** and **To** date from the calendar button.

12. Click **Save** button to save the changes. To save and add another asset click **Save and add new button**.

# Editing Non-IT Assets

To edit the non-it assets details,

1. Log in to ServiceDesk Plus using your user name and password.
2. Click the **Assets** tab -> select the **Non-IT Assets link** on the left hand side of the page. This opens the list view page of the IT assets.
3. Click the **title of the Non-IT asset** to be edited. This opens the **Asset details** page.
4. Click **Edit** button on the top right hand side of the page (Or) click the **Actions** combo box next to the edit resource button -> select the **Edit** option. This opens the **Edit Asset** page.
5. Edit the Asset Details block such as **Product Name**, **Asset Name, Tag, Serial No, Bar Code, Vendor Name, Cost, Acquisition Date, Expiry Date, and Location.**
6. Modify the Asset State details such as, **Current usage status** of the assets like In Use, In Repair and so on. Then the **Associate** the asset to **User or Department** details or **Assign** to **User or Department** details.
7. **Update** the changes. You can see the assets details getting updated.

# Adding Non-IT Assets to Group

You have two types of groups in ServiceDesk Plus say, **Static** group and **Dynamic**. Add to group option in Non-IT asset list view page is to group bulk of Non-IT assets. These assets will be grouped under the Static group by default.

**To Add Non-IT Assets to group,**

1. Log in to ServiceDesk Plus application using your user name and password.
2. Click any of the **Non-IT Assets** link under the Resources block on the left hand side of the page. This opens the Non-IT assets list view page.
3. Select the Non-IT assets to be added to the group by enabling the check box. This opens the **Add Resource(s) to** page.
4. By default you can group Non-IT assets only to the static group. Either to the **Existing static group** or **New static** group can be added.
5. If you would like to group the Non-IT assets under **existing static group** then click the corresponding radio button. Select the **group name** from the combo box.
6. Else, if you would like to add a new static group and group the Non-IT assets, click **New Group** radio button. Specify the **Group Name** and relevant information about the group in the **Description** field.
7. Click **Save** button to save the changes.

# Assigning Bulk Non-IT Assets to Department/Site

1. Log in to ServiceDesk Plus application using your user name and password.
2. Click the **Assets** tab in the header pane. This opens the assets home page.
3. Select the **Non-IT Assets** title under the **Resources** block. Select the specific Non- IT Asset link. This opens the Assets list view page.

**Assign Bulk of Assets to Department**

1. Click on the Non-IT assets to be assigned to a **Department** by enabling the check boxes. Click **Actions menu** -> select **Assign to Department** option. This opens **Assign Resources to** pop-up window.
2. Select the **Department Name** from the combo box.
3. **Save** the details.

**Assign Bulk of Assets to Site**

1. Click on the Non-IT assets to be assigned to a **Site** by enabling the check boxes. Click **Actions** menu -> select **Assign to Site** option. This opens **Assign Resources to** pop-up window.
2. Select the **Site Name** from the combo box.
3. **Save** the details.

# Modifying the State of Non-IT Assets

To modify the state of Non-IT Assets,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**. This opens the ManageEngine ServiceDesk plus home page.
2. Click on **Assets** tab -> Click **Non-IT Asset** link on the left hand side of the page. This opens the IT Assets list view page.
3. From the Assets list view page, select the asset to be modified by enabling the check box beside the asset title.
4. Click the **Actions** combo box -> select the **Modify State** option. (OR) From the Asset details page, click the **Change** link beside the Resource State on the right hand side of the page. This opens the **Modify State** page.
5. Select the **Modify State** from the combo box. Ex: In Use, In Store and so on.
6. **Save** the changes.

# Deleting Non-IT Asset

1. Log in to the ServiceDesk Plus application using your **user name** and **password**. This opens the ManageEngine ServiceDesk plus home page.
2. Click on **Assets** tab on the header pane. This opens the Asset home page.
3. Click **Non-IT Assets** link under Resource block on the left hand side of the page. This opens the Non-IT Assets list view page.
4. Enable the check box beside the assets to be deleted. Click **Delete** button.
5. A confirmation dialog appears. Click **Ok** to continue. You can see the selected assets deleted from the list.

# Viewing Non-IT Assets Details

1. Log in to the ServiceDesk Plus application using your **user name** and **password**. This opens the ManageEngine ServiceDesk plus home page.
2. Click on **Assets** tab -> Click **Non-IT Assets** link under on the left hand side of the page. This opens the Non-IT Assets list view page.
3. Click on the Non-IT Asset name to view the Non-IT Assets details. By default **Resource Info** tab details are displayed.

### Viewing Resource Info Details

Resource Info tab displays the Resource Details such as, Resource Name, Tag, Bar Code, Serial No Region, Cost, Acquisition Date and many other details are displayed.

### Viewing History of Non-IT Assets

Click on the History tab to view the Non-IT Assets history. This gives the complete Non-IT Assets Resource Ownership History on date and State of the Non-IT Assets.

### Request Details

On clicking the Request Details page you will be able to view all the requests raised for the Non-IT Asset.

On Clicking the request title you can view the details of the request, requester details, Assets belonging to the user, Time elapsed to solve the request, resolution for the request and history of the request

Also you can send reply for the request or forward the request to the technician. You can Search associated problem and change or add new problem or change to the request.

### Contracts Details

Click on Contracts tab to view the contracts attached to the Non-IT Assets. This gives the complete details about the contract such as, vendor name, support details, contract rules, expiry date, cost and other rules.

### Costs Details

1. Click on the Costs tab to view the costs associated to the Non-IT Assets.
2. Click on **Add Cost** button to add cost to the Non-IT Assets.
3. Select the **Cost Factor** from the combo box. For ex. Service Cost, Purchase Cost etc. This is a mandatory field.
4. Specify the description about the cost in the **Description** field. Say if the cost factor is service cost you can specify important information about the service cost.
5. Specify the **Amount** in $ in the Amount field. This is a mandatory field.
6. Select the **Date** from the calendar button. This is mandatory field.
7. Click on **Add Cost** button to add the cost. You can see the cost added to the Non-IT Assets shown in the Other Costs list view page.

# Assigning Non-IT Assets to Users and/or Department

To assign assets to asset/users/departments,

1. Log in to ServiceDesk Plus using your user name and password.
2. Click the **Assets** tab -> select the **Non-IT Assets link** on the left hand side of the page. This opens the list view page of the Non-IT assets.
3. Click the **title of the Non-IT asset** to be assigned to users or departments. This opens the **Asset details** page.
4. Click **Assign** button (Or) the **Actions** combo box on the top right hand side of the page -> select the **Assign** option. This opens the **Assign/Associate** page.
5. Select the **Assign the asset to User/Department** radio button to associate it to the user/department.
    1. Select the **User** from the combo box.
    2. Select the **Department** to be associated from the combo box.
    3. If the **Asset is Leased** then select the corresponding check box.
    4. **Save** the changes.
6. Else select the **Associate to Asset** radio button to associate to the asset.
    1. Choose **Asset** to be associated from the combo box.
    2. **Save** the details.

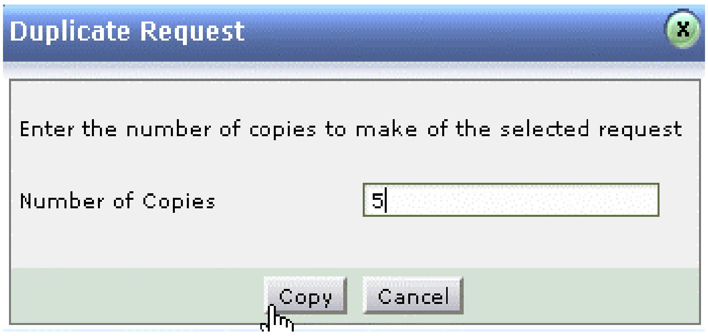
Once you save the details the page is refreshed with a message saying **'Owner assigned successfully for this resource'.**

# Copying Resources

Using Copy Resource option you can make multiple copies of the resource and its details. On making multiple copies of the resource, it becomes easier for the technician to add bulk of similar assets. The technician need not manually enter all the resource details for each resource. The new copies of the resource will be assigned with new asset name and rest of the details is retailed as is.

To make multiple copies of the Resources,

1. Log in to ServiceDesk Plus using your user name and password.
2. Click the **Assets** tab in the header pane. This opens the assets home page.
3. Click **Non-IT Assets** under **Resources** block on the left hand side of the page. Select the respective Non-IT assets link. e.g. Projectors, Scanners and so on. This opens the corresponding Non-IT asset page.
4. Click the **Title** of the assets to be duplicated. This opens the Asset details page.
5. Click the **Actions** menu on the right hand side of the page. Select **Copy Resource** option. This opens the Copy Resource pop up window.




5. Specify the **Number of Copies** to be made for the resource in the given numeric field.
6. Click **Copy** to make the copies of the Non -IT asset. The new copies of the Non-IT asset will be assigned with new asset name that will uniquely identify them. The rest of the information is retained as is. If required, you can also edit the resource details.

# Attaching Assets

To attach assets to the IT Assets,

1. Log in to ServiceDesk Plus using your user name and password.
2. Click the **Assets** tab -> select the **Non - IT Assets link** on the left hand side of the page. This opens the list view page of the Non-IT assets.
3. Click the **title of the Non-IT asset** to be attached to other assets. This opens the **Asset details** page.
4. Click the **Actions** combo box on the top right hand side of the page -> select the **Attach Asset** option. This opens the **Attach Asset** page.
5. You have two columns, such as **Asset list** and **Attached assets** list. You have to select the assets to be attached from the assets list and move it to the attached list using the **>>** button. To remove the asset from the attached asset list use the **<<** button.

   **Example:**

   If you would like to attach a scanner to a list of workstations then select the list of workstations from the asset list and move it to the attached asset list.
6. **Save** the changes. If you would like to detach all the attached assets then select the **Detach All** option.

   If you would like to display the list of all assets or a specific asset in the organization such as Linux workstations, Laptops D620 etc, then in this case select the assets to be displayed from the **List** combo box. Also select the **type of asset** such as assets in store, in use and so on from the **of type** combo box.

# Attach Component

To attach component to an Non -IT asset,

1. Log in to ServiceDesk Plus application using your user name and password.
2. Click the **Assets** tab in the header pane, this opens the assets home page -> select **Non-IT Assets** under **Resources** block on the left hand side of the page. Click the specific Non - IT asset link. This opens the Non-IT assets list view page.
3. Click the title of the Non-IT asset to be attached with an component. This opens the Non-IT asset details page.
4. Click the **Actions** combo box and --> select the **Attach Component** option from the list. This opens the **Attach Component** pop up window.
5. If you would like to display the list of all components or filter specific components then select the components to be displayed from the **List** combo box. Ex: keyboard, mouse and so on. Also select the type of component such as component in store, in use and so on from the **of type** combo box.
6. You have two columns, such as **Component list** and **Attached Components** list. Select the components to be attached from the components list and move it to the attached components list using the **>>** button. To remove the component from the attached component list use the **<<** button.

   **Example:**

   If you would like to attach a keyboard and a mouse to a workstation then select the list of components to be attached from the component list and move it to the attached component list.

7. **Save** the changes. If you would like to detach all the attached components then select the **Detach All** option.

# Attach Documents

To attach documents to an Non-IT Asset,

1. Log in to ServiceDesk Plus using your user name and password.
2. Click the **Assets** tab -> select the **Non-IT Assets link** under the resource block on the left hand side of the page. This opens the IT asset list view page.
3. Click the **title of the Non-IT asset** to be attached to other assets. This opens the **Asset details** page.
4. Click the **Actions** combo box on the top right hand side of the page -> select the **Attach Documents** option. This opens the **Attach File** pop up window.
5. Choose the file to be attached by clicking the **Browse** button. The maximum size of the attached file can be 10 MB.
6. Click **Attach File**. The attached document will be listed in Asset details page under Attached Documents. The attached file can be deleted by clicking the delete icon beside file name.

# Software Asset Management

ManageEngine ServiceDesk Plus discovers all installed software in the network. Asset managers have tough time managing personal, official and recreational software that is common in the workplace.

- ServiceDesk Plus groups scanned software based on Managed, Open Source types etc.
- Help in license management
- Help in Group based on application
- Software metering- which tracks the usage of the software in each workstation.

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# About Software

1. Click on **Assets** tab -> Click **Software** link under the Resource block on the left hand side of the page -> **Scanned Software** option. This brings up the Software list view page. By default, the list of **All Software** will be displayed.
2. Select the corresponding filter option from the **Viewing** combo box. You can view the softwares with different status levels using filters. They are,
    - **Excluded:** Software that is omitted from use.
    - **Freeware:** Software that is provided without charge.
    - **Managed:** All licensed software comes under this software type.
    - **Prohibited:** Software that is prevented from use.
    - **Shareware:** Software that is available free of charge, may be distributed for evaluation with a fee requested for additional features or a manual etc.
    - **Unidentified:** Unknown softwares can be categorized under this software type.

# Adding New Software

To Add new Software,

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the assets home page.
3. Click **Software** title under **Resources** block on the left hand side of the page. Click the **Scanned Software** link. This opens the software list view page. By default the list of **All softwares** will be listed.
4. Click the **New** button on the right hand side of the page. This opens **Add Software** form.
5. Specify the **Software Name** in the given text field. e.g. Adobe Photoshop. This is a mandatory field.
6. Specify the **Version** of the software. Say 7.1,7.2 etc.
7. Select the **Software Type** from the combo box. Say Managed.
8. Select the **Software Category** from the combo box. Say Graphics. This is a mandatory field.
9. Specify relevant information about software in the **Description** field.
10. Click **Add** button to add the software. You can see the newly added software getting listed in software list view page.

# Deleting Software

1. From the Software view list page, select the corresponding filter option from the **Viewing** combo box. By default the list of **All Softwares** will be displayed.
2. Select the softwares to be deleted by enabling the check box.
3. Click **Delete** button to delete the selected softwares. A pop up window pops up to get your confirmation on the delete operation. Click **Ok** to proceed. You can see the selected softwares getting deleted from the list.

# Changing Software Category

Using this option, you can change the existing category of the software. Ex: From Graphics software to Multimedia software so on.

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the assets home page.
3. Click the **Software** under **Resources** block on the left hand side of the page. Click **Scanned Software** link. This opens the software list view page.
4. Select the corresponding filter option from the **Filter Viewing** combo box. By default the list of **All Softwares** will be listed.
5. Select the software from the list to change the category by enabling the check box. Click **Change Category** button. This opens **Change Software Category to** pop-up window.
6. Select the Software Category from the list say Accounting, Development etc.
7. Click **Save** button to save the changes.

# Moving Software

Using this option you can change the current software type. Ex: If the current software type is Excluded then you can move the type to Managed.

To change Software Type,

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the Assets home page
3. Click **Software** title under **Resources** block. Click the **Scanned Software** link. This opens the software list view page.
4. Select the corresponding filter option from the **Filter Viewing** combo box. By default the list of **All Softwares** will be listed.
5. Select the respective **Move To** software filter option from the combo box. Select the software to be moved from the list by enabling the check box.
6. Click **Move** button to move the selected software to the specified category.

[OR]

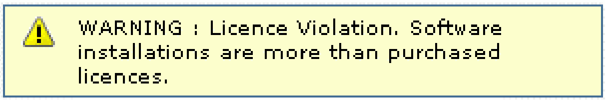
1. From the Software list view page, click the software name to change software type. This opens the Software details page.
2. Click the **Actions** tab and select **Change Software type** option from the list.
3. Select the **Software type** from the list and click **Change** button to change the software type.

Alternatively, you also have an option to change the software type by clicking the link Type : **Managed** [ Change ] in the Software details page.

# Viewing Software Details

1. From the Software view list page, select **Managed** software type from the **Filter Viewing** combo box, to view the license details of the software. All the licensed software comes under Managed software type.
2. Click on the software name to view the software details.
3. In the software details page, You have the Product Name, Version, Manufacturer and Category. You can also change the category by clicking **change** link adjacent to the category.

4. You can also view the purchased licenses details, Licensed users, Available Licenses and Unlicensed Installations. On having unlicensed installations you get a warning message for license violation as shown below,




## Licensed Installations

Under Licensed Installations, you can view the workstation details, user details, software usage details, number of licensed installations and allocated licenses details.

## Un Licensed Installations

Under Unlicensed installations, you can view the list of unlicensed installations , users using the unlicensed software, usage of the software say frequently or occasionally etc can be viewed.

### Allocate Licenses to single machines

1. Click on the Select software license icon -> Select software license page opens.
2. Select the license name by enabling the radio button.
3. Click Save button to save the changes. You can see the unlicensed installations changing to licensed installations and listed under the Licensed Installations column.

### Allocate Licenses to multiple machines

1. Select the workstations to allocate licenses by enabling the check box.
2. Click **Allocate License** button to allocate licenses to bulk of workstations. It takes all un allocated licenses and assign it to the workstations automatically.

## Purchased Licenses

Under Purchased licenses, you can view the number of purchased licenses, license type, Installation details, license key details etc.

To delete the purchased licenses,

1. Select the purchased licenses from the list by enabling the check box.
2. Click **Delete** button to delete the selected licenses. A window pops up to get your confirmation on the delete operation click Yes to proceed. You can see the softwares licenses getting deleted from the list.

**Move Licenses**

To move licenses to selected site,

1. Select the licenses to be moved to the site by enabling the check box.
2. Select the site from the **Move Licenses To** check box. Click **Move** button to move the licenses. You can change site by selecting the site from the site option at the top left of the page.

# Adding Software License

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the Assets home page.
3. Click **Software** title under **Resources** block on the left hand side of the page. Click **Scanned Software** link. This opens the scanned software list view page.
4. Click on the software name to add license by enabling the check box. This opens the software details page.
5. Click on **Actions** menu on the right hand side corner of the page. Click **Add Software License** option. This opens **Add Software License** page.
6. Select the **License Type** from the combo box. Ex: Enterprise or Individual. **Enterprise:** Is for the entire organization (license for unlimited users), **Individual:** Is for each individual.(license for limited users). This is a mandatory field.

**Individual License**

1. Specify the **Number of licenses** in the given text field. This is a mandatory field.
2. Specify the **License Keys** in the given text field. Say XBVJD,YCCYR,7DF28,JH2PX,MYT7M.

**Note**: The license keys values should be in comma separated values format.

3. Select the **Vendor Name** from the combo box. If the specified vendor is not available in the list click **Add New** link and specify the vendor details and save the changes.
4. Select the **Purchase Date** from the calendar button.
5. Select the **Site** name where the licensed software is installed, from the combo box.

**Enterprise License**

1. For enterprise license, specify the above mentioned details except for **Number of licenses** and **Site Name**.
2. Click **Save** button to save the changes. You can see the license getting listed in the software license list view page.

# Associating Software Minor Versions

ManageEngine ServiceDesk Plus allows you to group minor versions of the software under major version.

For e.g. A company buys AdobePhotoshop 7.0 with 4 licenses. The license is applicable for both 7.1 and 7.2 versions and vice versa. In this case 7.0 is the major version and 7.1 and 7.2 are the minor versions. The licenses purchased are the same for all the three versions.

If Adobephotoshop 7.0 is installed in two different machines and 7.1 & 7.2 is installed in other two different machines. On scanning for Adobe Photoshop software before grouping, the ServiceDesk Plus shows the list as different single entries. The purchased licenses for the software would be as' 4 ' for the version 7.0 and ' 0 ' purchases for other versions (7.1 & 7.2).

Using associate minor versions option you can group 7.1 & 7.2 minor versions under 7.0 major version. This shows the software list to be a single entry with the number of purchased licenses and installations. Thus helps you in avoiding individual entry for each version of the software. And also helps in easier management of the installed software for the assetmanager.

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the assets home page.
3. Click **Software** title under **Resources** block. Click **Scanned Software** link. This opens software list view page.
4. Click the software name. This opens the software details page.
5. Click on the **Actions** tab on the right hand side upper corner of the page. Click **Associate Minor Versions** option. This opens Associate minor versions page.
6. Select the managed software (licensed) to be grouped of minor versions from the list. Click **>>** button to move the selected managed software to the Version Group list. By moving the selected managed software under **Version Group,** all the minor versions will be associated with the major version.
7. Click **Save** button. You can see all the added minor versions getting displayed in the software details page under the title **Software - All Versions.**

# Emailing Users

ManageEngine ServiceDesk Plus has email options for the technicians to communicate to the users. Say, technicians communicate to the users for any event occurred or to get any information from users.

To Email Users,

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the Assets home page.
3. Click **Software** under **Resources** block. Click **Scanned Software** link. This opens the software list view page.
4. Click on the software name. This opens the software details page.
5. Click on the **Actions** tab on the right side corner of the page-> click **Email users** option. This opens Email Users page.
6. Specify the **To** email address in the given field.
7. Specify the **Subject** and **Description** about the email in the respective fields. By default you have subject and description provided for the email.
8. Click **Send E-mail** button to send the email to the user.

# Adding Software Licenses

ServiceDesk Plus helps you to manage software licenses installed across the enterprise. You can consolidate and manage all your software licenses from a single screen. ServiceDesk Plus will scan and automatically pickup license keys for Microsoft Windows and Microsoft Word. You can key-in all the licenses purchased earlier and track future purchase of software licenses through the Purchase module.

**To add software licenses for the existing software,**

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the assets home page.
3. Click **Software** under **Resources** block on the left hand side of the page. This opens the software list view page. (OR)

   Click **Quick Actions** 

 on the top left hand side of the page -> select **Software License** under **Create New** option. This opens **Add Software License** page.
4. Select the **Product Name** from the combo box. Ex: Software. This is a mandatory field.

   If the product name is not available in the list select **Add New** link to add the product. specify the Product Name in the given field. This is a mandatory field. Choose the Managed software from the list and click >> button to move the selected software to the selected software list. This is also a mandatory field. Click Save to save the details.

6. Specify the **Number of licenses** for the software in the given text field. This is a mandatory field.
7. Specify the **License Key(s)** for the software in the given text box.
8. Select the **License Type** from the combo box. Say Enterprise or individual. **Enterprise:** is for the entire organization (license for unlimited users) **Individual:** Is for the each individual.(license for limited users). This is a mandatory field.
9. Select the **Vendor Name** from the combo box. If the specified vendor is not available in the list, then click **Add New** link and specify the vendor details and save the changes.
10. Select the **Purchase Date** from the calendar button.
11. If you would like to allocate the license to any site then select the site from the **Allocate to** list combo box.
12. Click **Save** button to save the changes. You can see the license getting listed in the software license list view page.

## Editing Software Licenses

1. From the Software license view list page, click the software license name to be edited. This opens the software details page.
2. Click **Edit** tab on the right hand side of the page. (OR) Click on the **Actions** tab -> Click **Edit** option. This opens the **Edit Software License** page.
3. Do the required changes and click the **Update** button to update the changes. Click **Reset** button to reset the changes.

## Deleting Software Licenses

1. From the software list view page, select the software licenses to be deleted by enabling the check box.
2. Click **Delete** button. A confirmation dialog box pops-up, asking your confirmation on the delete operation.
3. Click **OK** to proceed. You can see the software license deleted from the list.

# Attach Document to Software Licenses

To attach document to Software Licenses,

1. Log in to ServiceDesk Plus application using your user name and password.
2. Click the **Assets** tab in the header pane, this opens the assets home page.
3. Click the **Software** title under the **Resources** block on the left hand side of the page. Click **Software licenses** link, this opens the software licenses details page.
4. Click the software license name to be attached with an document. This opens the software license details page.
5. Click the **Actions** combo box -> select **Attach Documents** option from the list. This opens the **Add/Remove Attachment** pop up window.
6. Click the **Browse** button to select a file. The maximum size of the attached file can be 10 MB.
7. On selecting the file, click **Attach File** button to attach the document.

# Viewing Service Packs

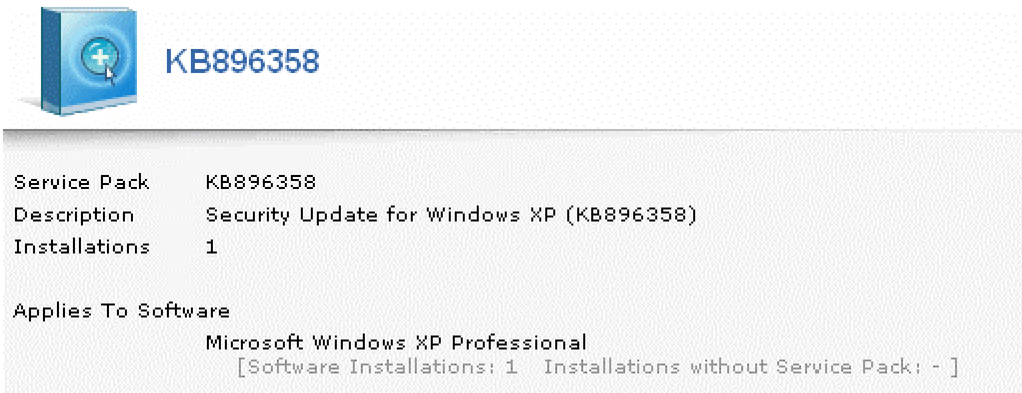
ServiceDesk Plus helps in tracking all the service packs such as, hotfix, security update, installer etc on scanning the workstations.

To view the Service Pack details,

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the assets home page.
3. Click **Software** title under **Resources** block. Click **Service Packs** link. This opens the service packs list view page.
4. Click the service pack name to view the service pack details. This opens the service pack details page.

In the service pack details page, you get the complete details about the service pack with number of installations and installation without service packs. It also provides information on the number of software the service pack applies to.

<u>**Example**</u>: If the service pack **Security Update for Windows XP** is applicable for **Microsoft Windows XP Professional** and **Microsoft Windows 2000 Professional** then this software list would be displayed before the service pack installations list.




## Service Pack Installations

Under this block you get the list of all service pack installations with the Workstation name, User name, Installed On and Installed By details.

## Software Installations without Service Packs

Under this block you get the list of all software installations without the service packs with the Workstation name, User name, Software and Usage details.

# Edit / Delete Service Packs

## To Edit Service Packs,

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the Assets home page.
3. Click the **Software** title under **Resources** block on the left hand side of the page. Click the **Service Packs** link. This opens the Service Packs list view page.
4. Select the Service Pack name to be edited from the list. This opens the service pack details page.
5. Click the **Edit** button on the right side corner of the page. This opens the Edit Service Pack page.

   Modify the Service Pack Name, Type and Description of the service pack. Also you can add software or service packs to the existing service pack list. To add to the list, select from the available list of software and move to the selected software using >> buttons.
6. Click **Save** button to save the changes.

## To Delete Service Packs,

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the Assets home page.
3. Click the **Software** title under **Resources** block on the left hand side of the page. Click the **Service Packs** link. This opens the Service Packs list view page.
4. Select the **Service Packs** from the list to be deleted. Click the **Delete** button. A pop up window pops up asking your confirmation on the delete operation.
5. Click **Ok** to proceed. You can see the service packs deleted from the list.

# Groups

## Manage Groups

ManageEngine ServiceDesk Plus helps you to group assets based on asset properties. You can group assets of users belonging to the same team and location. Organizing assets based on groups gives you more fine-grained control and helps you manage assets efficiently. E.g. you can group assets based on OS, Service packs, Memory size and so on. When you are getting ready for migration you will be able to pinpoint assets with 256 MB RAM that need upgrade before rolling out Windows Vista.

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- Creating New Group
- Removing Assets from a Group
- Editing and Deleting Group

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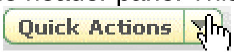
# Creating New Group

For easier channelization, users can be categorized under Static and Dynamic groups.

Under **Static group** you define the group by listing its members.

Under **Dynamic group** resources are grouped automatically based on certain criteria set by the administrator.

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the assets home page.
3. Click **Quick Actions** link 

menu on the top left side of the page. Select **New Group** under Asset - Groups from the list. [OR]

   Click **Groups** under **Resources** block on the left hand side of the page. Click **New Group** link. This opens the **Create Group** form.

4. Specify the **Group Name** in the given text field. This is a mandatory field.
5. Specify relevant information about the newly created group in the **Description** field. Say the group name is Test DL600 you can specify Test DL600 stands for Dell Lateral 600.
6. Select any of the **Group Type** by enabling the radio button. Say **Static** or **Dynamic** group.
   **Static Group:** You define the group by listing its members.
   **Dynamic Group:** Resources are grouped automatically based on certain criteria.
7. Click **Save** button to save the group. You can see the newly created group getting listed in the **Create Group** page.
8. Once the group is created you have to add resources to the group.

**To add resources to the Static group,**

1. Select the filter criteria from the **Showing** combo box. Say for ex. You can select **All Assets** in **Use**.
2. Specify the **Search** criteria in the given text field.
3. Click **Go** button to list all resources based on the filter criteria. All the resources gets listed under **Pick resources to add** block.
4. Select the resources to be added to the group by enabling the check box.
5. Then click **Add** button to add resources to the group. You can see the selected resource added to the group, shown under Resources In group column.

**To add resources to the Dynamic Group,**

1. You define the filter criteria by selecting the **Criteria** and **Conditions** from the combo box. Select the **Criteria** from the combo box say for e.g. **Resource Criteria** or **Workstation Criteria**.
2. Select **Conditions** from the combo box, which will be listed based on the selected criteria.
3. Click **Choose** button to choose the resource or workstation criteria listed based on the criteria you have selected. **For example:** If you have selected resource criteria as **Product Type** and conditions as **is** then on clicking choose button you will get the list of all product types say scanners, keyboard, printers etc.
4. Select any one of the **Match Criteria** by selecting either of the radio buttons. Say (And) or (OR) criteria.
5. Select any of the listed Product Type and click **Ok** buttons to add to the group. You can see the group criteria getting listed.
6. Click **Save and View group** button to view the list of all resources based on the filter criteria.

# Removing Assets from Group

To remove the existing resources from the group,

1. From the Group list view page, select the resource name from the list by enabling the check box under the Resources in-group column.
2. Click **Remove from Group** button to remove the resources. You can see the selected resource deleted from the list.

# Editing & Deleting Groups

## To Edit Groups,

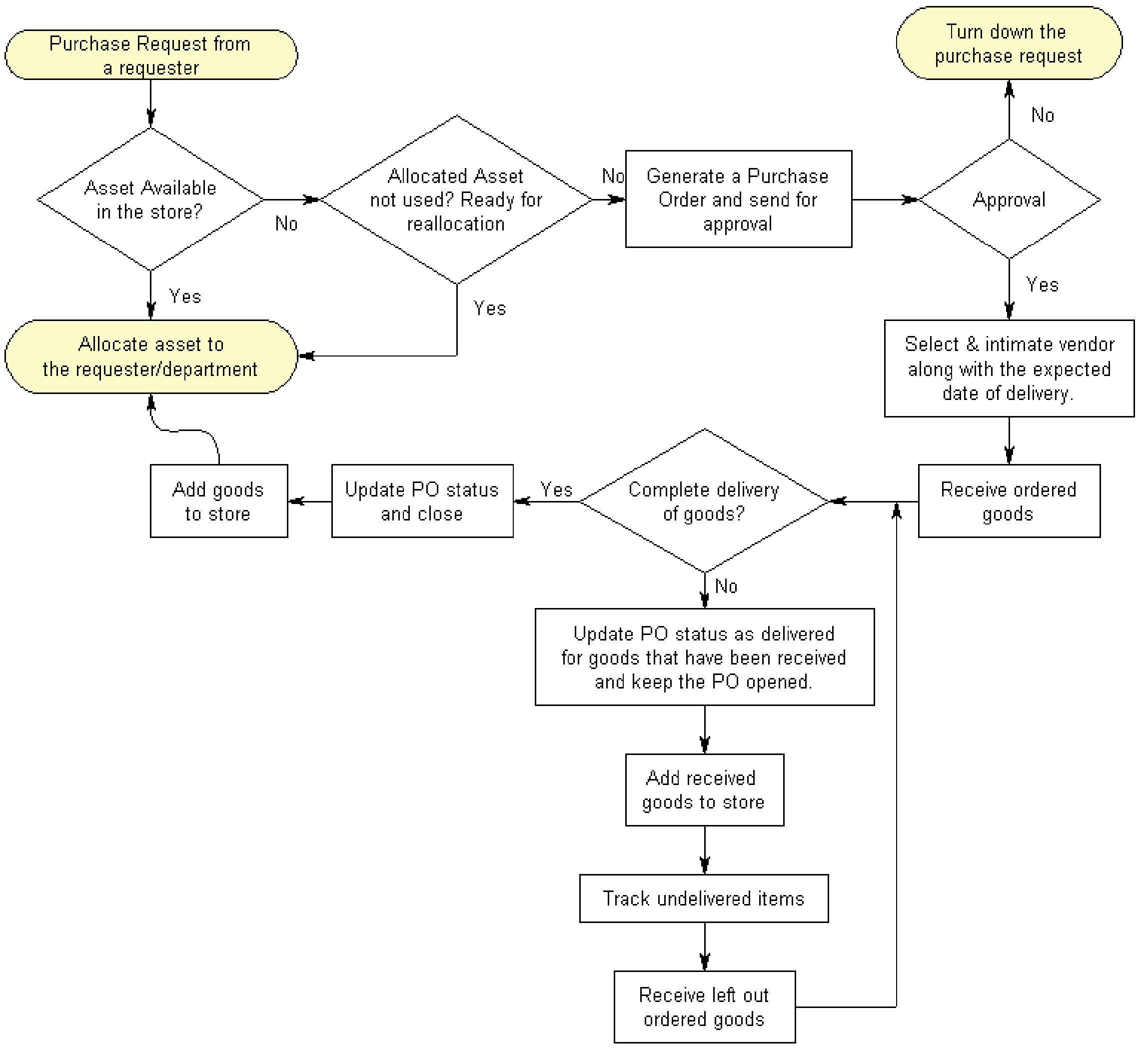
1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Assets** tab in the header pane. This opens the Assets home page.
3. Click **Groups** under **Resources** block on the left hand side of the page. Click **Manage Groups** link.
4. From the Manage Group list view page, click **Edit** link. This opens **Edit Group** page.
5. In the Edit Group form, the Group Type is in non editable text. Do the required changes and click **Save**.

## To Delete Groups,

1. From the Manage Group list view page, click the corresponding **Delete** link to be deleted on the right hand side of the page.
2. A pop up window pops up to get your confirmation on the delete operation. Click **OK** to proceed. You can see the group deleted from the list.

# 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.

# About Purchase Order

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click on **Purchase** tab in the header pane. This brings up the Purchase Orders list view page. By default the status of the Purchase Order will be 'All POs'.
3. Select the corresponding filter option from the **Filter Showing** combo box. You can view purchase orders with different status levels using filters. They are,

- **All POs**
  All Purchase Orders irrespective of the status will be listed. This is the default status on opening the purchase order list view.
- **Open POs**
  The newly added Purchase Order will fall under this category. These POs are not submitted for approval.
- **POs Pending Approval**
  The Purchase Orders which are submitted and waiting for approval from the purchase order approvers will be listed under this category.
- **Approved POs**
  All the Purchase Orders which are approved but the purchase items are not yet received will be listed under this category.
- **Rejected POs**
  All the Purchase Orders rejected by the purchase order approver gets listed under this category.
- **Partially Received POs**
  Purchase Orders, which are partly received from the vendor, will be listed under this category.
- **Closed POs**
  The Purchase Order gets listed under this category when the purchased items are fully received from the vendor.
- **Overdue POs**
  Purchase orders not delivered and have exceeded the delivery date will be listed under this category.
- **POs due in next 7 days**
  Outstanding Purchase Orders, expiring in next 7 days will be listed under this category.
- **POs due in next 30 days**
  Outstanding Purchase Orders, expiring in next 30 days will be listed under this category.
- **Searched POs**
  While searching for the Purchase Order under Search, the list of Searched POs will fall under this category.

# 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 **Purchase** tab in the header pane. This opens the purchase order list view page.
3. Click the **New Purchase Order** button available in the Purchase Order block.(OR)

   Click **Quick Actions** 

button in the home page --> click **Purchase Order**


   option under Create New. This opens the **Add Purchase Order** form. By default, the status of the Purchase Order while adding will be **New PO**, after which the status changes to **Open**.
4. Specify the **Order No** in the given field. For ex: 140. This is mandatory field.
5. Enter the **PO Name** say, Purchase of monitors, and the **Required By Date** by invoking the calender icon . The PO name in mandatory field.
6. Select the **Vendor Name** from the combo box. This is mandatory field. If the specified vendor name is not available in the list, click **Add New link** adjacent to the Vendor field and specify the vendor details like Name, Contact Information and Contact Person of the vendor. Click **Save** button to save the details.
7. Select the **Shipping and Billing Address** from the combo box. You can also add the shipping and billing address by clicking the Add New link . Enter relevant details in the pop up window.
8. On selecting the Vendor, the corresponding **Product Type** and **Products** gets populated in the combo box. Select the Product type and the Products, the items gets listed one below the other along with the price details.

   You can also add new product to the specified vendor by invoking the icon beside the product combo box. This opens the Products Details pop up window. Specify the **Product Name** and the **Product Type** of the item which are mandatory fields. Specify the **Part No** and the **Price** of the item in the given fields. Click **Save**, the item gets added to the list.
9. By default, the check box beside the item will be enabled. Specify the price of the item if it is not mentioned and the quantity of items to be ordered in the text box. The cost calculations of the item changes accordingly to the number of items purchased.
10. Under the general information block, select the **Cost Center** and the **GL Code** from the combo box. By default, the **Requested By** will be the name of the technician creating the PO. The **Created Date** and the **Owner** is in non editable text.
11. Enter the description for the PO or any other information that you wish to add in the **Remarks** field.
12. If there are any specific terms associated with the PO, enter the same in the **Terms** field.
13. If you would like to attach a file then click **Attach file** button.
14. Select the Approvers of the purchase order from the **PO Approver(s) list** pop window by clicking the icon .
15. Specify the **Signing Authority** of the company in the respective field.
16. Click **Save the Purchase Order** button to save the details.

# 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 **All POs**, by default. If you want to see a PO that is in any other state, then you need to choose corresponding state from the **Filter Showing** combo box.
3. From the list of POs, click the **PO Name** link of the PO that you wish to view.

The **View Purchase Order** displays the PO details in the same way as in create PO form. The PO header has the name of your organization, logo, and the mailing address. The Order No, PO Name, Required By date and the status can be viewed at the right hand side of the header.

Next, consists of 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. Adjacent to this is 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, part no, 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.

The General Information consists of, the Created Date, Owner of the PO, PO requested by, the cost center and the GL Code.

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, attachments and the PO Approver(s) List. The footer consists of the signing authority and Place.

In case of closed POs in the view PO details page, you can also view the received items beside the ordered no of items in the Item List block.

# 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 **All POs**, by default. If you want to see a PO that is in any other state, then you need to choose corresponding state from the **Filter Showing** combo box.
3. From the list of POs, click the **PO #** of the PO that you wish to edit.
4. Click **Actions** button --> **Edit Purchase Order**. The edit PO form is similar to the create new PO form where you can edit the PO details. Edit the entries and proceed as elaborated in Creating a New Purchase Order section.
5. Click **Save Purchase Order** to save the changes and sent the PO for approval to the concerned approvers.

# PO Approval Process

All purchase orders that are created are grouped under **POs Pending Approval**, if the approver is selected in the approvers list field. 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.

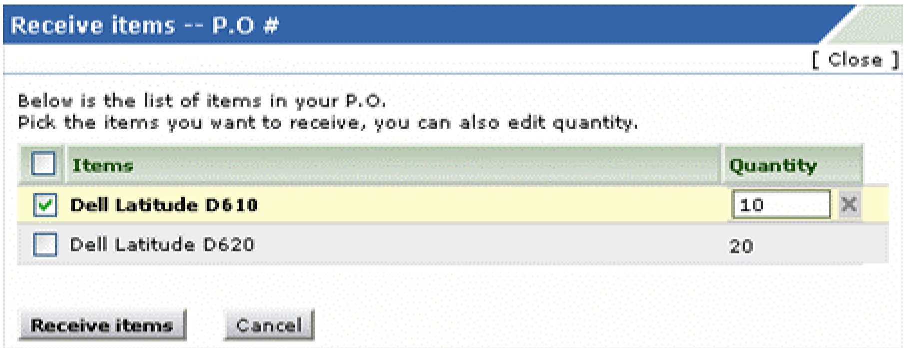
# Receiving PO Items

Once the PO is approved, it is sent to the vendor to receive the ordered items. The ordered items can be received either partially or completely from the vendor. In both the cases you can have the receipt of the received items. On receiving the partial items from the vendor the purchase order can be marked as **Partially Received** and moved under **Partially Received POs**. And on receiving the complete items from the vendor, the purchase order can be moved under **Closed POs.**

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Purchase** tab in the header pane. This opens the Purchase Order list view page.

**To mark partially or completely receive items,**

1. From the Purchase Order list view page select the corresponding filter option from the Filter Showing combo box. By default, the list of **All POs** will be displayed.
2. Select **Approved POs** from the **Filter Showing** combo box. Click the **PO # Name** for the received items. This opens View Purchase Order page.
3. Click on the **Actions** tab and click **Receive Items**. The Receive Items dialog pops up.
4. Enable the check box beside each of the received items. If only a part of the ordered items are delivered, then click the quantity of the item which is partially received and enter the quantities that have been received as shown below,




5. Click **Receive Items** button. This updates the PO with the Received Quantity value 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. Once all the items have been received, the PO moves to the closed status.

All the received items from the PO will be added as resources automatically. And the resources that are created from a particular PO will be associated to that particular PO.

## Associated Assets

The purchased items received can be viewed and associated to groups.

1. Click **Actions** tab -> **Associated Assets** link option. This will display all the assets that were created from the PO.
2. Associate the assets to the group by enabling the check box beside the asset. Click **Actions** button --> **Add to Group**. This opens the **Add Resource(s) to** pop up window.
3. Select the group from the existing list of groups or enable the radio button beside **New Group,** to add a new group. The asset gets associated to the corresponding group.

# 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 **All POs** , 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. This opens the View Purchase order page.
4. Click **Actions** button on the right of the task block --> **Print Preview** option. The Purchase Order details are displayed in a printable format in a pop-up window.
5. Click Ctrl + P keys (OR) click **Print** from the browser menu to print the purchase order details.
6. Set the required options and click **Ok**.

# Deleting a Purchase Order

To delete purchase orders,

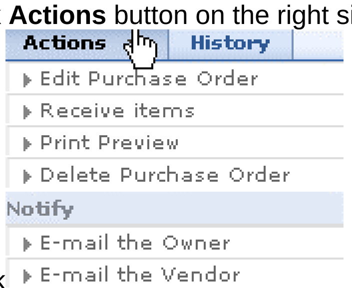
1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Purchase** tab in the header pane. This displays the list of **All POs**, by default. If you want to delete PO that is in any other state, then you need to choose corresponding state from the **Filter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

You can also delete individual POs by clicking the PO # and entering the PO details view. Click **Actions** button --> **Delete Purchase Order** option.

# 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 by attaching the PO to the 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. This opens the purchase order list view page.
3. In the list of 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. Click **Actions** button on the right side of the page --> click **Email the Owner** under the notify


block
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. You can attach any relevant documents by clicking **Attach File** button.
9. Click **Send**. A message is displayed saying that the e-mail has been sent.
10. Click **Close** to close the window.

# E-mailing the Vendor

On approving the Purchase Order by the concern technicians, an e-mail notification is sent to the vendor on the purchase of the items.

To e-mail 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 **E-mail 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.

# Purchase Default Values

You can set the Purchase Default Values such as the default currency, default tax rate, billing & shipping address, and terms & conditions of the purchase. To add purchase default values,

1. Login to ServiceDesk Plus application using your **user name** and **password**.
2. Click on the Admin tab in the header pane.
3. In the Purchase/ Contracts block, click **Purchase - Default Values** icon . This opens the Purchase Default Values page.

## Adding Purchase Default Values

1. Specify the **Default Currency** (For example, USD or $). This will be displayed in all the purchase orders (PO) generated and in any place where money is being used.
2. Specify the **Default Tax Rate** (%) in the given text field. This will be the tax rate, used for calculating the sales tax in all the POs generated. If you wish to have a different tax rate for any specific PO, then enter the new rate while creating that particular PO.
3. Specify the **Signing Authority**'s name in the given text field.
4. If you wish to have tax shipping as default value, then select the check box beside **Tax Shipping** field.
5. Select the **Shipping Address** to which the PO items will be shipped and the **Billing Address** to which the invoice and bill needs to be sent from the combo box.
6. Select the **Cost Center** department from the combo box.
7. Select the **Approver(s)** name from the list.
8. Enter the **PO Terms & Remarks** in the given text field.
9. Specify the **PO# Start From** number in the text field.
10. **Save** the settings.

# Purchase Order Additional Fields

You can configure purchase additional fields that need to appear in the new purchase order form.

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Admin** tab in the header pane.
3. In the Purchase/Contracts management block, click the **Purchase - Additional Fields** icon . This opens the Purchase - Additional Fields page. You can add four types of fields in the form: text, numeric, date/time and cost.

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.
    - **Single-line text field:** Allows you to add just a text field in the new purchase order form.
    - **Multi-line text field:** Allows you to add a text box where a lengthy description can be added in the new purchase order form.
    - **Pick List:** Allows you to add a combo box in the new purchase order form. Contents of the combo box can be added by specifying it in the text field and adding it to the list. This gives you an option to select from the list . In all the three cases, you can add default values for the text field in the space provided for the field.

   To add items for the pick list, enter the value in the text filed and click **Add Item**. To select the default selected value of the list, click on the value in the list.

6. To add numeric fields, click the **Numeric** tab and then enter the label name in the form fields provided for the same.
7. To add date/time fields, click the **Date/Time** tab and enter the required details.
8. To add the cost field, click the **Cost** tab. You have two cost type fields, **Add cost** (for cost addition) and **Subtract cost** (for cost subtraction). Click the corresponding radio button to select the cost fields.
9. Click **Save**. A message for successful creation of the fields is displayed.

These fields (except for cost) appear under the General Information in the **New Purchase Order** 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 Problem form.

# General Ledger Code (GL Code)

You can add all the general ledger codes using this option. A general ledger account will have a specific code for all transactions in the organization. On specifying the GL code you will be able to track the necessary information for a specific transaction.

**Example**: If you like to know all your company's IT purchases for the November month 2007, then you can specify the GL code for IT purchases in november 2007 and get the details.

1. Login in to ServiceDesk Plus application using your **user name** and **password**.
2. Click on the **Admin** tab in the header pane.
3. In the Purchase/Contracts management block, click **GL Code** icon . This opens the GL Code List page.

## To Add GL Code

1. Click the **New GL Code** link on the right hand side of the page. This opens the GL Code Details page.
2. Specify the GL Code in the given fields. This is mandatory field.
3. Specify any relevant information about the GL Code in the **Description** field.
4. Click **Add GL Code** button to add the code to the GL Code list below.

## To Edit GL Code

1. Click the Edit icon on the left side of the GL code. This opens the edit GL code page.
2. Modify the value and save the details.
3. Click **Add GL Code** button.

## To Delete GL Code

1. Click the Delete icon on the left side of the GL code.
2. A dialog box pops up asking your confirmation on the delete process. Click **Ok** to proceed. You can see the GL Code deleted from the list.

# Cost Centre

Individual department or a group of department makes a Cost center. These cost centers are budgeted and tracked for the cost, income and allocation. These cost centers will be associated with the purchase order while making a new purchase in your organization.

To add cost centre,

1. Login in to ServiceDesk Plus application using your **user name** and **password**.
2. Click on the **Admin** tab in the header pane.
3. Click **Cost Centre** icon under the Purchase/ Contract Management block. This opens the Cost Centre List view page.
4. Click **New Cost Centre** link on the right hand side of the page. This opens Cost Centre Details page.
5. Specify the **Cost Centre Code** in the given text field. This is a mandatory field.
6. Specify the **Name** of the cost centre in the given text field. This is a mandatory field.
7. Select the **Department** from the list. This is a mandatory field.
8. Specify the **Owner** name in the given text field. This is a mandatory field.
9. Specify the **Description** about the cost centre in the given text field.
10. Click **Add Cost Center** button to add the cost center.

# Notification Rules

Notification Rules are helpful when an event has to be notified to the technicians.

For ex. When Purchase order is overdue or Audit changes during discovery or Software under Compliance during discovery or when prohibited software is identified during discovery.

When the above-mentioned situations are managed suitably, it not only helps technicians in efficient management of the assets but also brings in cost savings to the organization.

## Enabling Notification Rules

1. Click on Admin tab -> Click Notification Rules icon under the Asset Management block. This opens Notification Rules page.
2. To set the notification rules select the relevant notification rules by enabling the check box. These notification rules are self-explanatory.
3. Except for **Purchase order Overdue**, You can assign technicians to notify of the fault for all the other notification rules.
4. To assign technician select **Choose** button, this brings up the **Choose Technician Name** page.
5. Select as many as technicians from the list using ctrl or shift keys.
6. Click **OK** button to save. You can see the selected technicians displayed in the choose technicians grayed out field.
7. Click **Save** button to save the set notification rules. The notification to the administrator or to the technicians will be generally sent through email.

## Customize Message Template

1. You have default message template for **Purchase Order and Contracts**. To customize email templates as per your requirement,
2. In the Notification Rules page -> under Customize Message Template, there are two message templates available one for **Purchase Order & other for Contracts**.
3. Click **Email Template** link beside the corresponding module. This opens **Message Template** page. In the Message Template edit form; the Notification Type is a non-editable mandatory field.
4. You can change the **Subject** provided for the notification type.
5. In the Message block, to add content variables that need to be a part of the notification, select the fields from the **Database fields list** and click >> button to move the database fields list to the **Notification fields list**. If you want to remove the fields from the Notification Fields list, then select the same and click << button.
6. To order **Notification Fields** you can select Forward arrow or backward arrow button.
7. On completing the modifications, click **Save** button to save the settings.

# 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.

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- About Contracts
- Creating a New Contract
- Viewing Contract
- Editing and Deleting Contract
- Viewing Contract Owner Details
- Renewing Contract
- Print Preview of Contract
- E-mailing the Contract Owner
- E-mailing the Vendor
- Search Contracts

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# About Contracts

1. Click on **Contracts** Tab. This brings up the Contracts view list page. By default, the list of **Open Contracts** will be displayed.
2. Select the corresponding filter option from the Filter Showing combo box. You can view the contracts with different status levels using filters. They are,
    - **Open Contracts**
      Contracts which are active and yet to get expired comes under this category.
    - **All Expired Contracts**
      All the expired contracts will be listed under this category.
    - **Contracts expired in last 30 days**
      Contracts which expired in the last 30 days gets listed under this category
    - **Contracts expiring in next 7 days**
      Contracts, which will be expiring in next 7 days, will b listed under this category.
    - **Contracts expiring in next 30 days**
      Contracts, which will be expiring in next 30 days, will be listed under this category.

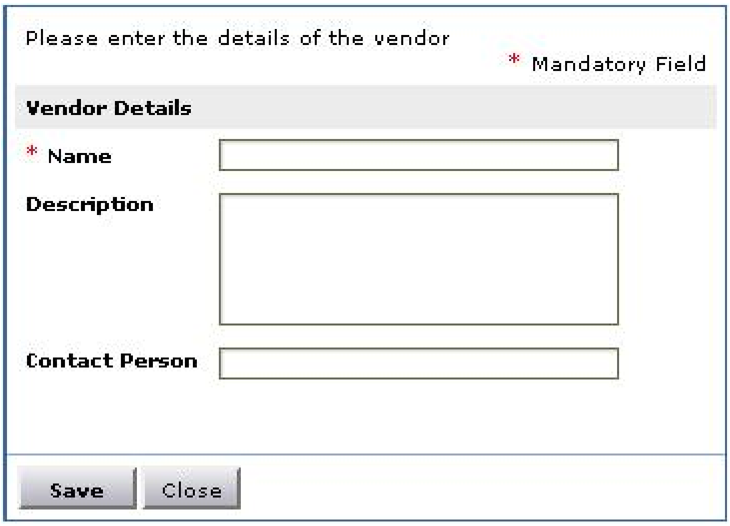
# Creating a New Contract

To create a new contract for asset,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Contract** tab in the header pane. This opens the contracts list view page.
3. Click the **New Contract** button in the contract index page. (OR)

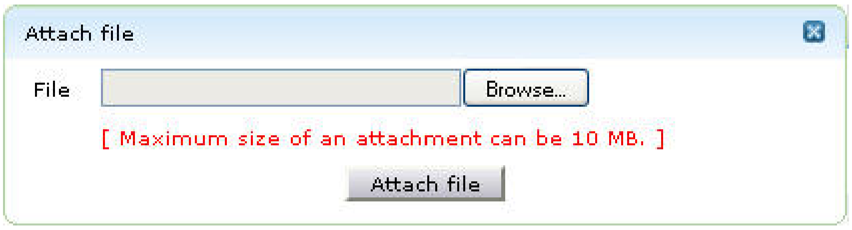
   Click **Quick Actions** link 

 in the home page -> Click **Contracts** option under Create New. This opens the Add Contract form. This form has three major sections: **Contract Details**, **Contract Rules**, and **Notification Rules**.
4. Specify a name for the contract in the **Contract Name** field. This is mandatory field.
5. Enter relevant **Description** for the contract in the respective text field.
6. Select the **Maintenance Vendor** from the combo box listing all the vendor names available. This is mandatory field. If the vendor is not listed, then click **Add New Vendor** button beside the combo box. The **Add New Vendor** window pops up as shown below,




   1. Specify the name of the vendor in the given field. This is mandatory field.
   2. Enter a brief description about the vendor in the respective field.
   3. Specify the **Contact Person** in the given field.
   4. Click **Save**. The added vendor is selected and is displayed in the combo box. If you do not wish to add a new vendor then click **Close**.
7. In the **Support** field below it, enter the details regarding the kind of support that will be provided by the vendor to you.

8. You can add files that are related to the contract and are necessary to be maintained and referred to along with the contract information. Click **Attach File** button. The Attach File window pops up as shown below,




    1. Click the **Browse** button to open the file selector window.
    2. 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. The total size of the attachments should not exceed 10 MB.
    3. The attached file gets listed along with the File name and the size. The file can be deleted on clicking the **Delete** icon beside the file name.

9. 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. Select the **Assets** that are covered under the contracts from the **Maintained Assets** list.
10. To add more resources to the list, click **Select Resources for this contract** link. This opens Select Resources page.
    1. Specify the **Resource Name** or **Product Type** or **Product** in the search field.
    2. Click **Search** button to get the result. Select the required resources by enabling the check box.
    3. Click **Add Items** button to add the selected items.
    4. Click **View Resources>>** button to view the selected resources.
    5. Click **Add Resources** to Contract button to add resources to the Maintained Assets list.
    6. Click **Remove Selected Resources** icon to remove selected resources from the list.
11. 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.
12. Enter the maintenance cost in terms of $ in the **Maintenance Cost** field.
13. 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.
14. 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 **Open Contracts** is displayed.
3. Select the status of the contract you wish to view using the Filter Showing combo box.
4. Click the **Contract Name** link that you wish to view. This opens the View contract page.

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 hyperlink 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 and Deleting Contracts

## Editing 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 **Open Contracts** is displayed.
3. Select the status of the contract you wish to edit using the Filter Showing combo box.
4. Click the **Contract Name** link that you wish to edit. This opens the View Contract page.
5. Click the **Edit** button on the right hand side of the page. (OR)

   Click **Actions** combo box **-** > **Edit Contract** option. This opens the Edit Contract form.
6. The existing details of the contract is displayed. 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.
7. Once you are done with editing, click **Save**. If you entered wrong information and want to know what the initial values were, then instead of **Save**, click **Reset**.

## Deleting Contract

To delete 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 **Open Contracts** is displayed.
3. Select the status of the contract you wish to delete using the Filter Showing combo box.
4. Click **Delete** on enabling the check box beside the contract.
5. A pop up window confirming the delete operation appears. Click **Ok** to proceed. The contract will be deleted from the list.

# 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 **Open Contracts** is displayed.
3. Click the **Contract Name** link to view the contract owner details. This opens the View Contract details page.
4. Click **Actions** combo box **-** > **View Owner Details** option. A pop up window containing the owner details such as, name, employee id, designation, contact information appears.
5. Click **Close** to close the pop-up.

# 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 **Open contracts** is displayed. Select the status of the contract which you wish to renew using the Filter Showing combo box.
3. Click the **Contract Name** link that you wish to renew. This opens the View Contract page.
4. Click **Actions** combo box -> **Renew Contract** option. 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 renew 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 Vendor Details page pops up. Specify the name of the vendor, description, and the contact person name in the pop-up window. **Save** the changes.
7. If you have any information on the type of support, enter the same in the **Support** text area.
8. If there are any documents that you wish to attach to the contract, click the Attach File button. The Attach File window pops up.
    1. Click the **Browse** button to open the file selector window.
    2. Select the file that you wish to add and click the **Attach File** button. The selected file is added and gets listed along with the File Name and size. If you wish to delete any of the file then click the delete icon beside the file. The total size of the attachments should not exceed 10 MB.
9. Select the Assets that are covered under the contracts from the Maintained Assets list. To add more resources to the list,
    1. Click **Select Resources** link. This opens Select Resources page.
    2. Specify the **Resource Name or Product Type or Product** in the Search field.
    3. Click **Search** button to get the result.
    4. Select the required resources by enabling the check box.
    5. Click **Add Items** button to add the selected items.
    6. Click **View Resources>>** button to view the selected resources.
    7. Click **Add Resources** to **Contract** button to add resources to the Maintained Assets list.
10. 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.
11. Enter the maintenance cost in terms of $ in the **Maintenance Cost** field.
12. Select **Enable Notification** option by enabling the check box. On enabling you get the **User list & Notified User** list. To notify users regarding contract expiry select the user from the User list and click forward **>>** button to move the user to the Notified User List. Specify the days before which the information has to be notified in the Notify before field.
13. Select the check box, **Disable all notifications for the old contract**, to disable notifications of the old contract.
14. Click **Save**.

# Print Preview of 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 **Open Contracts** is displayed.
3. Select the corresponding filter option from the **Filter Showing** combo box.
4. Click the **Contract Name** that you wish to print. This opens the view contract page.
5. Click Actions combo box -> click **Print Preview** option. The contract details are displayed in a printable format in a pop-up window.
6. Click the **Print** option to print the contract details.
7. Set the required options and click **OK**.

# 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 **Open Contracts** is displayed in the contract list view page.
3. Click the **Contract Name** link of the contract you wish to e-mail the owner. This opens the view contract page.
4. Click **Actions** combo box -> **E-mail the Owner** option. 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 **Send**. A message is displayed saying that the e-mail has been sent successfully.
8. Click **Close**.

# E-mailing 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 **Open** contracts are displayed in the contract list view page.
3. Click the **Contract Name** link of the contract you wish to notify the vendor. This opens the **View Contract** page.
4. Click Actions combo box - > click **E-mail the Vendor** option. 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 **Send**. 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 on the left hand side of the page, 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 for 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 module 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. Moreover, new technicians joining the organization can browse through these recorded solutions to have an idea of the frequently resolved problems.

You can access the approved 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.

# About Solutions

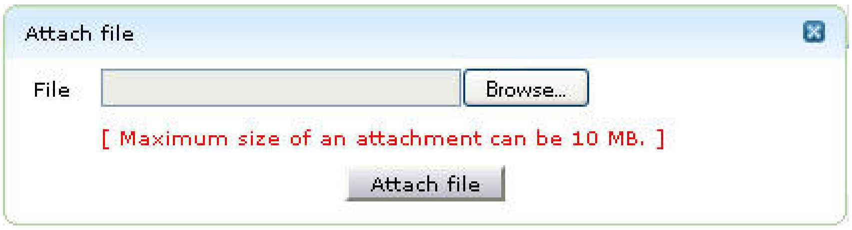
1. Click on the **Solutions** tab. This brings up the Solutions view list page. By default, the list of **All Solutions** will be displayed.
2. Select the corresponding filter option from the Filter Showing combo box. You can view the solutions with different status levels using filters. They are,
    - **All Solutions**
      All the solutions irrespective of the status can be viewed under this category.
    - **Approved Solutions**
      All the approved solutions will be listed under this category.
    - **Approval Pending Solutions**
      The Solutions which are sent for approval gets listed under this category.
    - **Unapproved Solutions**
      The Solutions which are not approved and has to be sent for approval will be listed under this category.
    - **Rejected Solutions**
      All the rejected solutions will be listed under this category.

# 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 **Solutions** tab in the header pane. This opens the solutions list view page. By default, the list of all solutions gets displayed. Click **New Solution** button.(OR) Click **Quick Actions** -> **Solutions** under the Create New block. This opens the New Solutions page. The title, contents and the topics 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. Enter the complete solution in the **Contents** text field.
5. If this solution requires any additional files to support the article, then you can attach the same by clicking **Attach File** button. The **Attach File** window pops up as shown below,




i. Click **Browse** and select a file from the file chooser window. Click **Open**.

ii. Click **Attach File** button. The attached file gets listed along with its size.

iii. Repeat steps 1 and 2 to attach another file.

1. 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.
2. 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.
3. To publish the solution in the self-service portal also, select the check box **Publish this solution in Self-Service Portal also**.
4. Click **Add**. If you do not wish to add the solution then click **Cancel**.

# Viewing Solution Details

You can view the solution along with the solution details such as created by, created on, status and so on in the solution module.

To view the solution details,

1. Login to ServiceDesk Plus application using your username and password.
2. Click **Solution** tab in the header pane. This opens the solution list view page. By default, the list of **All Solutions** gets displayed as shown below,


3. Click the solution which you want to view from the solution list view page. This opens the View Solutions Details page as shown below,

4. The **Solution Id** and the **Status** gets displayed on the right hand side of the page.
5. The **Subject, Type** and **Category** can be viewed along with the complete solution.
6. The **Keywords** gets listed below the solution. If there are multiple keywords then they are separated by commas.
7. The **Solution Details** such as Created By, Created On, Type, Views, Status and so on can be viewed under this block. The requester details can be viewed by clicking the created by link.
8. The comments given to the solution on approving/rejecting can be viewed in **Comments History**. The status of the solution can also be viewed.

# Editing a Solution

To edit a specific solution,

1. From the solutions list view page, click on the solution which you want to edit using the filter showing combo box. (OR) you can select the solution which you wish to edit by clicking the topic from browse by topics. All the solutions, irrespective of the status, available under that topic gets listed.
2. Click the **Edit** button available on the right hand side of the view solutions details page.
3. 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.
4. 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**.
5. On Saving the solution, the status of the solution shows **Unapproved**. The solution has to be submitted for approval to the concerned technician. To know more on refer Submit for Approval.

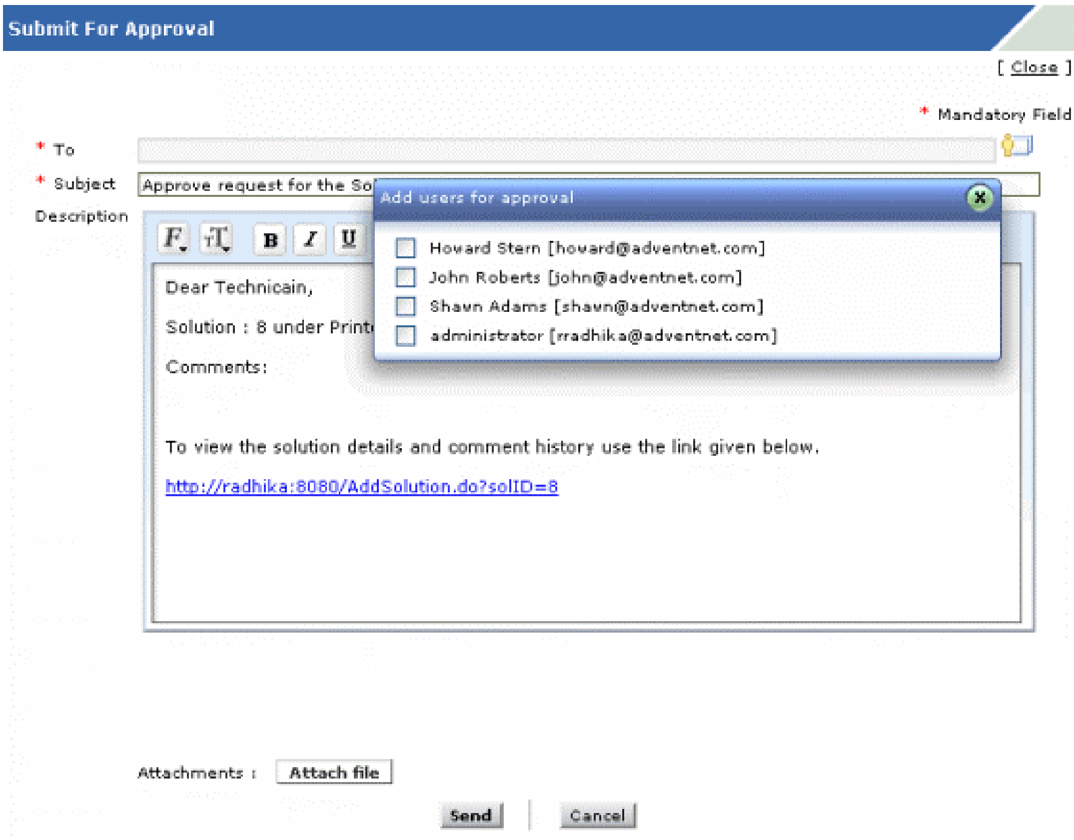
Alternatively, to open the solution that you wish to edit, type the solution title in the keyword field of the search block and click **Go** or press the **Enter** key. The solutions matching the search string will be listed, from which you can choose the solution and edit the same.

# Submit for Approval

The newly added solutions has to be approved by the concerned technician, in order to be viewed by the requesters in the self service portal. To provide access permission to approve solutions refer Configuring Roles.

To submit for approval,

1. From the solutions list view page, select **Unapproved Solutions** from the filter showing combo box. The list of all Unapproved solutions gets displayed.
2. Click the subject of the solution which you want to submit for approval. This opens the View Solutions page. The Status is shown as Unapproved below the Solution Id.
3. Select **Submit for Approval** under the **Approve Actions** combo box on the right hand side of the page. This opens Submit for Approval page.
4. Select the **To** address by invoking the icon. This opens the Add users for Approval pop up window as shown below,




   - Enable the check box adjacent to the user whom you want to submit the solution for approval.
   - The **To** text field gets filled with the mail id of the corresponding administrator.

5. The **Subject and Description** is entered as given in Notification Rules email template. If needed you can modify the subject and description content manually, else you can change the same from the Notification Rules email template under Helpdesk.

6. If there is any relevant files to be attached then, click **Attach File** button.
7. Click **Send** to submit the solution for approval.

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 solution which needs approval. On clicking the link, it leads you to the login screen, where on providing the proper credentials, the solution awaiting approval opens. To approve/reject solutions refer Approve/Reject Solutions.

# Approve / Reject Solution

On submitting the solutions for approval, a mail notification is sent to the concerned technician requesting the approval of the solution along with the solution link. The solution can be either approved or rejected. The approval access permission is given in Configuring Roles.

To approve/reject solution,

1. Click the link to open the solution.
2. Login to the ServiceDesk Plus application using your username and password. This opens the view solution details page of the solution pending for approval. The status of the solution shows Approval Pending on the right hand side of the page.
3. Click **Approve Actions** combo box -> **Approve Solution**. This opens the **Approve Comments** pop up window. Specify any related **Comments** in the field provided. Click **Approve**.
4. If you wish to reject the solution then, select **Reject Solution** under **Approve Actions**. This opens **Reject Comments** pop up window. Specify comments, such as reason to reject the solution in the **Comments** field. Click **Reject**.

To approve/reject bulk solutions,

1. From the solution list view page, select **Unapproved Solutions** from the filter showing combo box. Enable the check box adjacent to the solutions which you want to approve/reject.
2. Click **Approve Actions** combo box -> **Approve Solution**. This opens the **Approve Comments** pop up window. Specify any related **Comments** in the field provided. Click **Approve**.
3. If you wish to reject the solution then, select **Reject Solution** under **Approve Actions**. This opens **Reject Comments** pop up window. Specify comments, such as reason to reject the solution in the **Comments** field. Click **Reject**.

The approved solutions can be viewed by the requesters in the self service portal. The rejected solutions can be edited and sent for approval to the concerned technician. Thus the solution is not completely deleted from the list.

# Delete Solutions

To delete a specific solution

1. From the solutions list view page, click on the solution which you wish to delete using the filter showing combo box.
2. Alternatively, click the topic in which the solution you wish to delete is available. All the solutions available under that topic are listed. Alternatively, you can also search for the solution using the Search in Solutions feature.
3. Click the **Delete** button available on the right hand side of the page. A confirmation dialog opens.
4. To continue deleting, click **OK**; or else, click **Cancel**.

To delete multiple solutions,

1. **Enable** the check box adjacent to the solution in the solutions list view page.
2. Click **Delete** button. A confirmation dialog opens.
3. Click **Ok** to continue. The solution gets deleted from the list.

# Search in Solutions

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

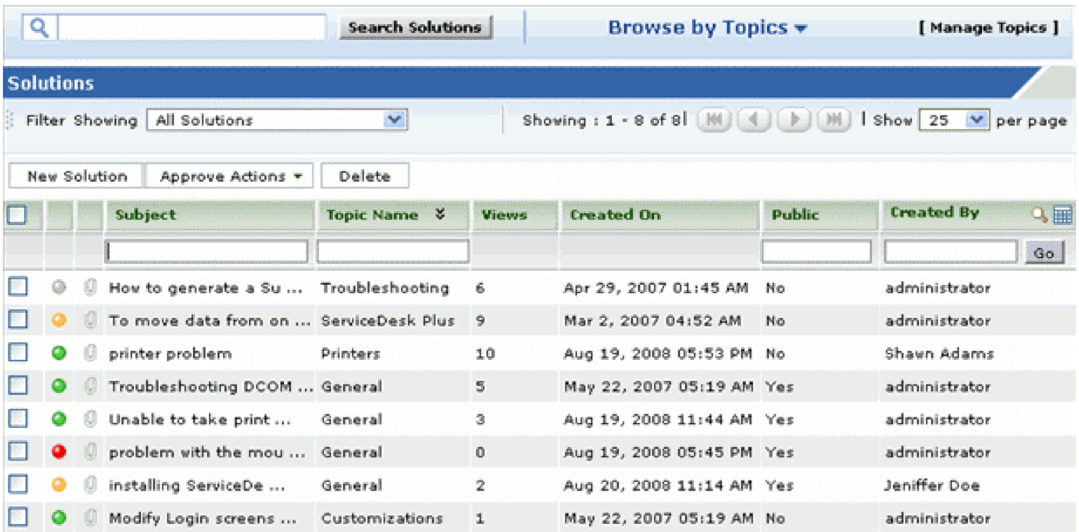
To search for solutions,

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.

Alternatively, from the solutions list view page, enter the search string in the Search Solutions text field. Click **Search Solutions** button. The list of solutions corresponding to the search string gets displayed.

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

1. Click the search icon at the end of the solution list view headers. This opens the search field just below every column in the list view as shown below,



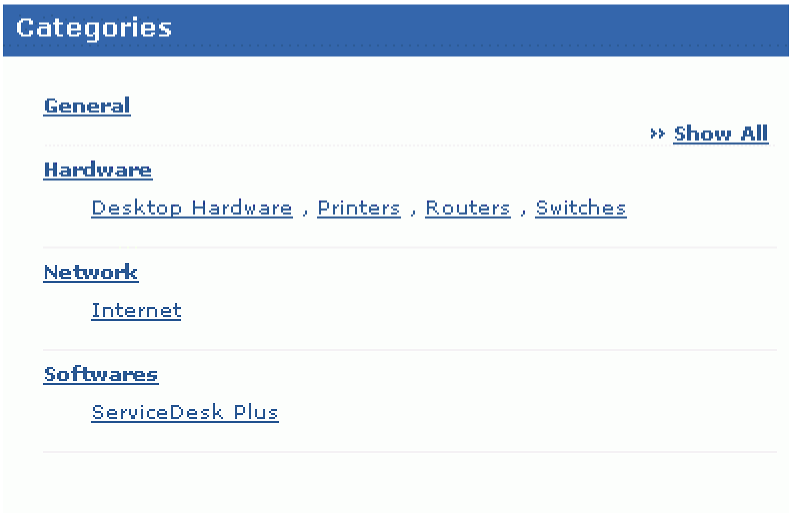

2. Enter the search key in field under the column of your choice. You can enter keywords in more than one column to perform a combined column search.
3. Click **Go**. The search results matching the search string(s) are displayed.

# Browsing Solutions by Topic

To browse for solutions using topics,

1. Log in to ServiceDesk Plus application using your user name and password.
2. Click the **Solutions** tab in the header pane. This opens the Solutions list view page.
3. Hover over 

combo box next to manage topics link. This opens the **Categories** window listing all the topics and their sub topics as shown below,




4. To view all the sub topics, click **>>Show All** link on the right hand side of the page. This lists out the topics and sub topics in a logical manner.
5. On clicking the topic, the solutions of the topic and its corresponding sub topics gets listed. Click the sub topic to view the solutions only in that sub topic.

# 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** link (OR) Click the **Manage Topics** link available in the **Solutions** list view page adjacent to the Browse by Topics combo box. 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 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,

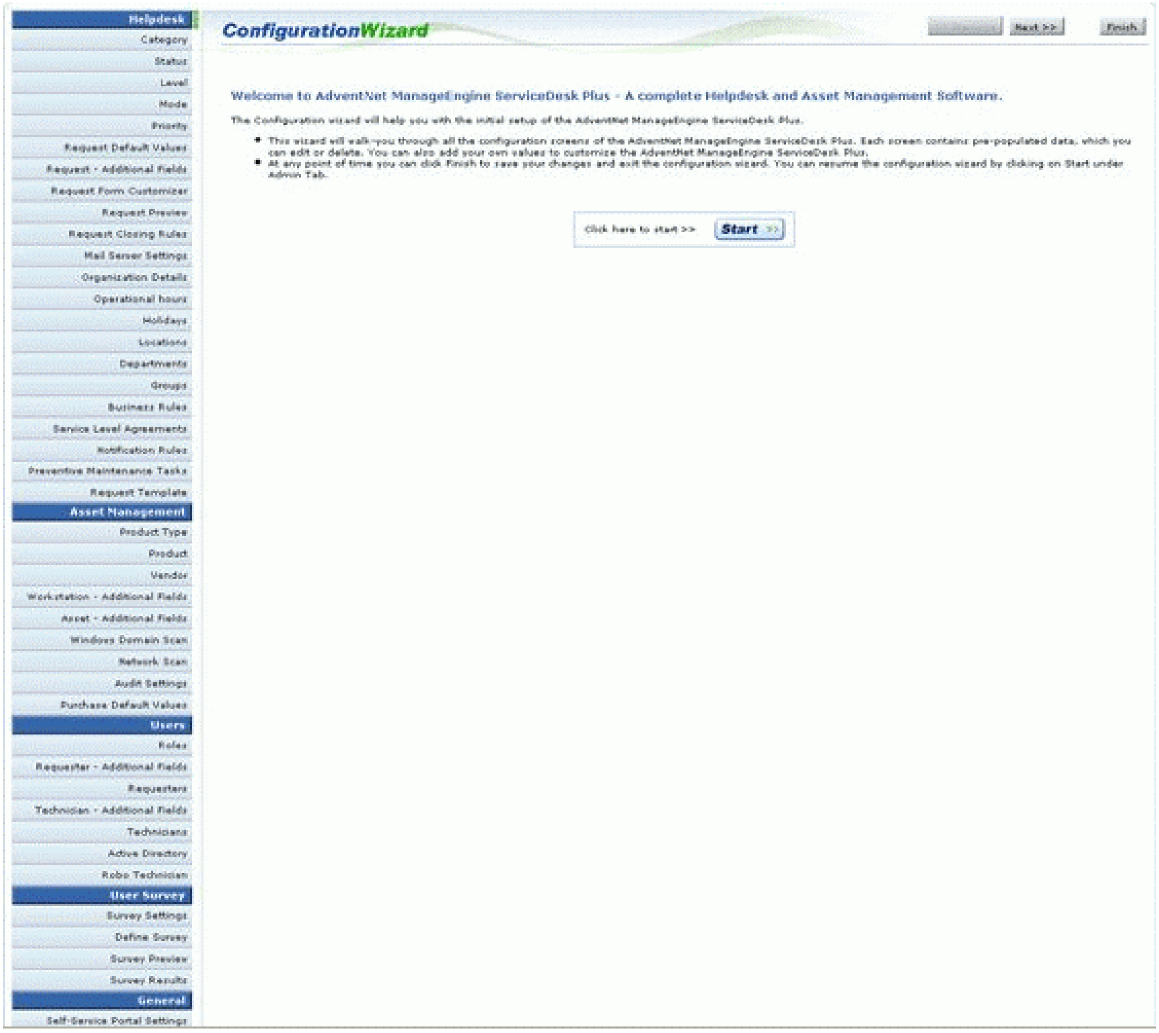
1. Select the check box below the first point. This opens the topic list box, and enables you to move the reference of the solutions of the topic to a different parent topic of your choice.
2. Select the parent topic of your choice from the list box.
3. To move the subtopics to a different parent topic, 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.

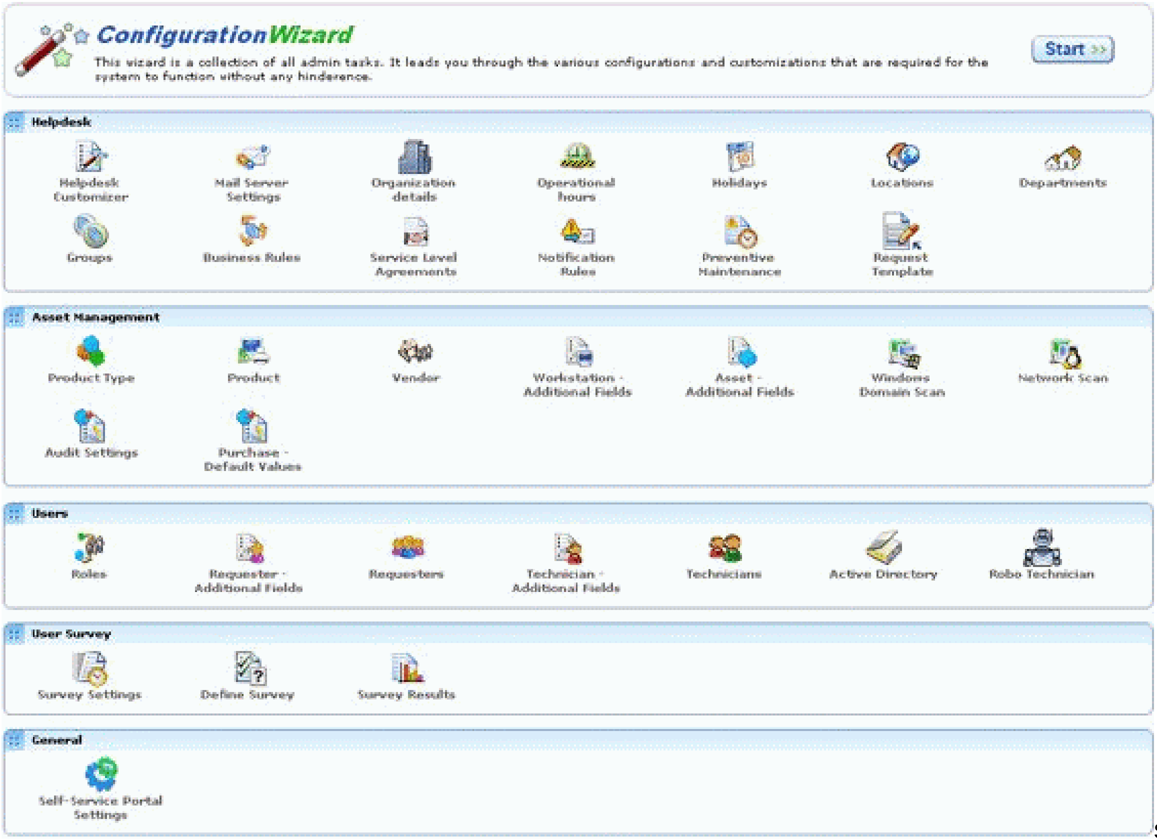
# Configurations

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:



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The various configurations are grouped under the following major heads:

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

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

# Helpdesk Configurations

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

1. Request category
2. Request Status
3. Request level
4. Request mode
5. Impact
6. Urgency
7. Request priority
8. Request Type
9. Configuring Additional Fields that need to appear in the new request form, so as to collect information very specific to your organization
10. Request Closing Rules
11. Request Template

There are other configuration that need be done are:

1. Organization details
2. Mail Server settings
3. Region
4. Sites
5. Operational hours of the organization in different sites
6. Holidays
7. Departments
8. Configuring Business Rules
9. Service Level Agreements
10. Notification Rules
11. Configuring Preventive Maintenance
12. IT Services

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**.

***<u>For example</u>*****:** 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 . The next page displays the list of request form attributes that can be customized on the left menu and the category list page.
4. Click **Mode** from the left menu. The **Mode List** page is displayed. You can add, edit, or delete the request mode.

## Add Mode

To add a request mode

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

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

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

## Edit Mode

To edit an existing mode

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

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

## Delete Mode

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

# Adding New Impact

Impact is a measure of the business criticality of an Incident or a Problem. Impact is often measured by the number of people or systems affected. By default you have four Impact details listed in the list view.

To add new Impact,

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 **Impact** link at the left side of the page under the HelpDesk block. This opens the Impact page.
5. Click **New Impact** link on the top right hand side of the page. This opens the **Add** impact details page.
6. Specify the **Name** of the impact in the given text field.
7. Specify the details about the impact in the given **Description** field.
8. **Save** the changes.
9. Click the **Save and add new** button to save the Impact and add another Impact.

# Adding New Urgency

Urgency is about the necessary speed of solving an incident of a certain impact. By default you have four Urgency details listed in this page.

To add new urgency,

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 **Urgency** link at the left side of the page under the HelpDesk block. This opens the Urgency page.
5. Click on the **New Urgency** link on the right hand side of the page. This opens the **Add** urgency details page.
6. Specify the **Name** of the Urgency in the given text field. This is a mandatory field.
7. Specify the urgency details in the **Description** field.
8. **Save** the changes.
9. **C**lick the **Save and add new** button to save the urgency and add another urgency.

# 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 **Helpdesk 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. This opens the **Add Priority** form.
2. Enter the priority name in the **Name** text field. The provided name has to be unique and cannot be duplicated. This is a mandatory field.
3. If required, select the **Color** code to identify the priority by invoking the icon. The selected color has to be unique for every priority specified.
4. You can enter a short description about the priority in the **Description** field. This can help in understanding the kind of priority associated with the name mentioned in the Name field.
5. Click **Save**. 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, click **Save and add new** button. This adds the new priority and reopens the add priority form.

Note: The priority name along with its color code can be view in the request list view page provided the priority check box is enabled in the column chooser.

## 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. From the **Priority List** page, enable the check box beside the priority name that you wish to delete.
2. Click **Delete** button. A confirmation dialog appears.
3. Click **OK** to proceed with the deletion. The priority gets deleted from the available list. If you do not wish to delete the priority, then click **Cancel**.

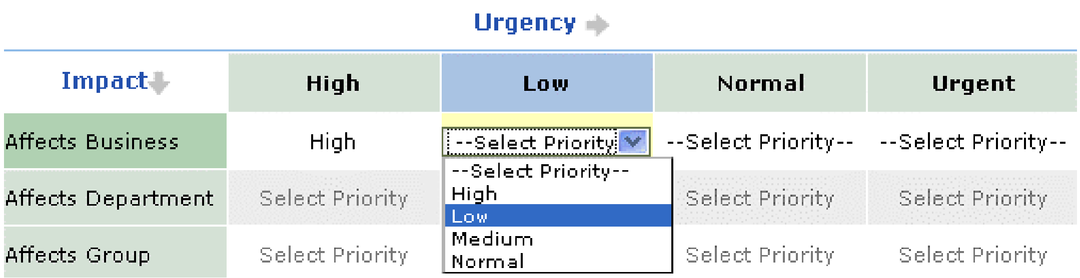
# Priority Matrix

The priority matrix helps you to determine the Priority automatically based on Impact and Urgency of a request. Impact is listed in the y-axis, and Urgency list in the x-axis of the matrix. Priority Matrix requires a one-time configuration by the Administrator.

Once you set the Priority for specific Impact and Urgency in the priority matrix, when a requester selects a similar impact and urgency combination in the new request form, then the priority of the request will be determined based on the matrix.

To set up Priority Martix,

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 **Helpdesk 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 Matrix** from the left menu. The next page displays priority matrix with impact list in the y-axis and the urgency list in the x-axis.
5. From the Priority Matrix page, click the priority link against specific urgency and impact, this opens the drop down box.




6. Select the corresponding priority from the list. The priority will be set for the particular **Impact and Urgency** combination.

| | |
|---|---|
| Example | In priority matrix : If Impact is Affects Business and Urgency is High then Priority should be High.<br><br>Result in request form : If requester/technician selects Affects Business for impact and high for urgency in the request then, the priority field gets filled automatically and displays as high. |

# Configuring Request Type

Request Type is the type of request sent by the requester such as service request or request for any information. ServiceDesk Plus gives you the provision of configuring your request type other than the default options. This is essential while creating a new request under the request module.

1. Login to ServiceDesk Plus application using the username and password of the admin user.
2. Click the Admin tab in the header pane.
3. In the **Helpdesk** block, click the **HelpDesk Customizer** icon. This displays the list of request form attributes that can be customized on the left menu.

## Add Request Type

To add a new request type,

1. Click the **Add Request Type** link on the right hand side corner of the Request Type list page. This opens the Add Request Type form.
2. Specify the name of the request type such as, Incident, Request for Information in the **Name** text field. This is mandatory field.
3. Enter a brief description about the type of requests which fall under the category in the Description text field.
4. Click **Save**, to save and return to the list view page. Click **Save and Add New** to save and create another request type.

## Edit Request Type

1. From the Request Type list page, click the edit icon beside the request type which you want to edit. This opens the **Update- Incident** page.
2. Modify the changes in Name and Description text field.
3. Click **Save** to save the changes. You can also Save and add a new request type by clicking **Save and Add New**.

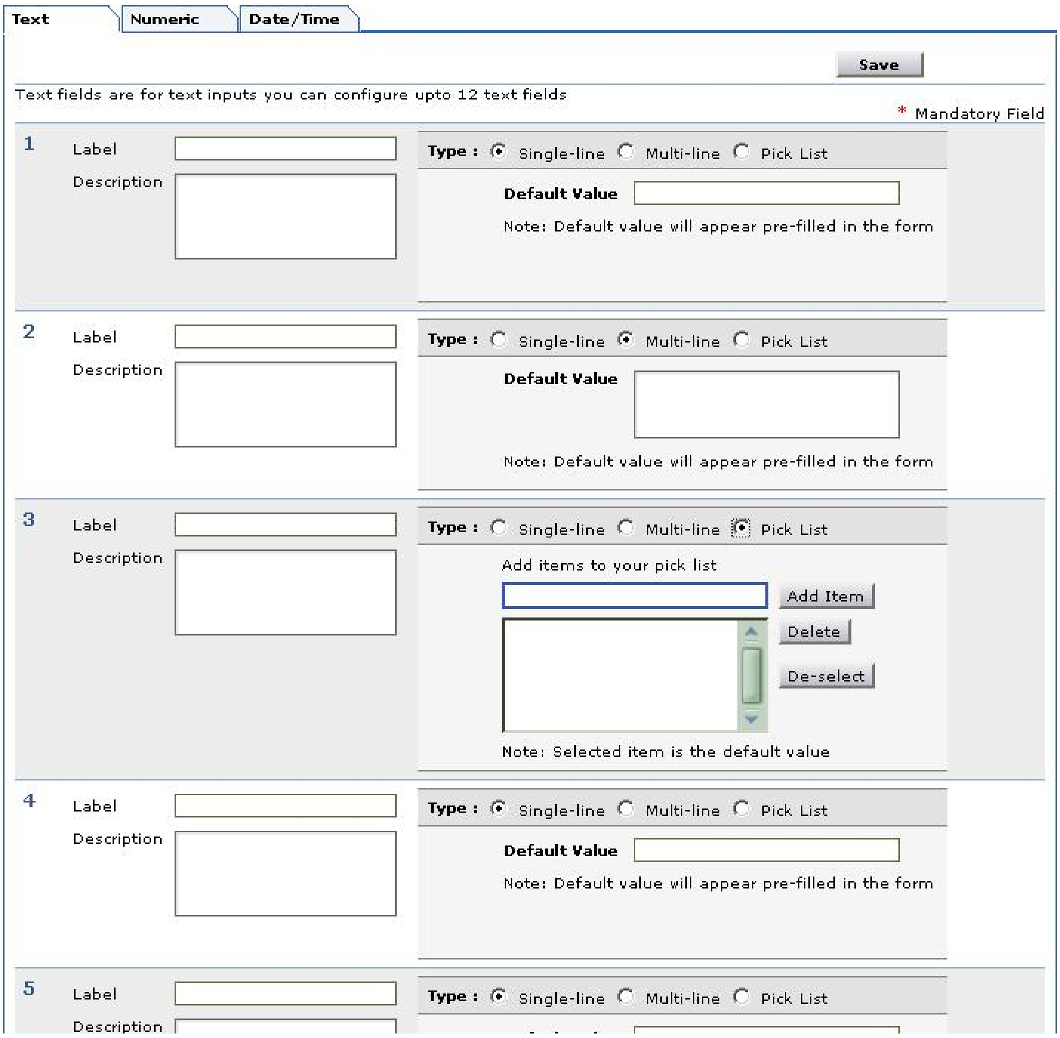
## Delete Request Type

1. From the Request Type list page enable the check box adjacent to the request type which you want to delete.
2. Click **Delete** button. A confirmation message for the delete operation pops up. Click **Ok** to proceed. The request type gets deleted from the list.

# 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.

On adding the field, the newly added fields has to be configured in the Request Template by Drag and Drop method. You can also preview your new request form by clicking the Request Template link in the left menu.

# 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. You can also use it to confirm user acknowledgement to the technician and close requests either manually or automatically.

## 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 for closing the request from the list by enabling the check box.

## Confirm User Acknowledgement

On closing the request, the resolution is acknowledged by the requester through mail (if the option is enabled in Notification Rules). If you want to prompt a confirmation message to the technician asking if user has acknowledged the resolution then enable **Yes, prompt a message** radio button, else enable **No, don't prompt a message** radio button.

## Request Closing Process

### Manual Closing

1. If you would like to close the request manually select the **Manual radio button**.
2. **Save** the changes. On resolving the request each time you have to close the request manually.

### Automatic Close

1. Select the **Automated Close** radio button to close the request automatically.

   In the automatic mode,

   - An email is sent to the requester when the Request is put in **Resolved** state
   - The Requester can **Close the Request** with the close link given or **Re-open the Request by replying to the mail.**
   - If the Requester takes no action the Request will be closed after the number of days specified in the combo box.

2. Select the **close resolved request after n number of days** from the combo box. After the selected number of days the resolved requests will be closed automatically if the requester does not take any action.
3. Save the details.

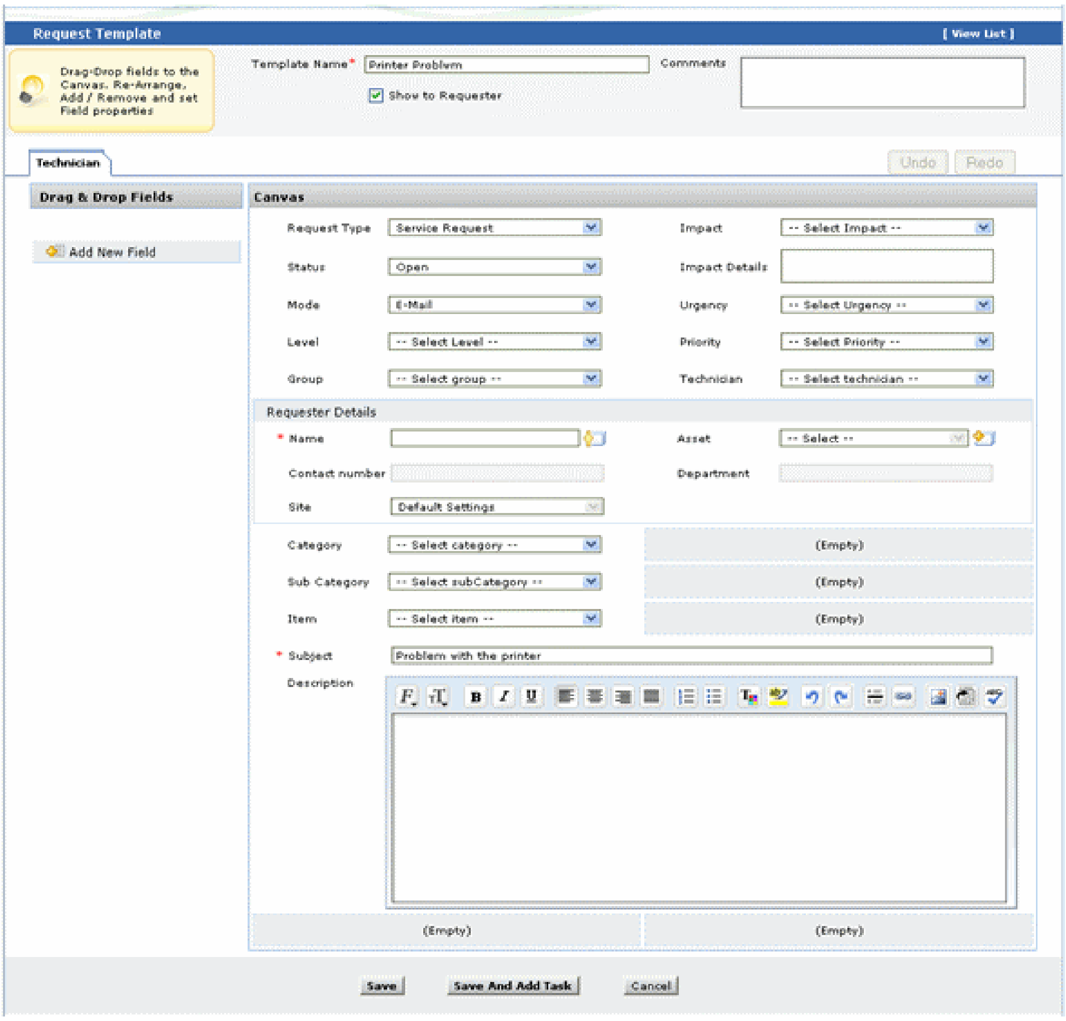
**<u>Example:</u>** If you have selected Resolution as a mandatory field, then the technician fixing the problem, should enter the reason and solution for the problem in the resolution text field before closing the request, else an error message pops up asking you to enter the details in the resolution field. If **Yes, prompt a message** radio button is enabled then, a confirmation message is prompted to the concerned technician if user has acknowledged the resolution.

# Request Template

In real world, there is a need to support different types of request which might require different fields in the form layout. Request Template supports to configure different set of fields for different type of requests. Thereby creating individual form for each request template for the most frequently raised requests such as, printer problem or mail fetching problem. The fields can be pre filled with values so that a request can be created instantly.

To open the request template form,

1. Login to **ServiceDesk Plus** application using the admin username and password.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click **HelpDesk Customizer** icon . This opens the Configurations wizard page.
4. Click **Request Template** on left side of the page under the helpdesk block. This opens the Request Template list view page.
5. Click **Create New** button. This opens the request template form viewed by the technician as shown below,



The request template form consists of three blocks namely, Header, Field list and the Canvas.

- **Header** : The header consists of the **Template Name**, **Comments** and **Show to requester** check box and the **Undo** and **Redo** buttons. If you want the requester to view the form, enable 'Show to requester check box'. By default, this option is disabled. This status can be viewed in the list view page.
- **Field List** : The field list consists of the list of fields and the add new field option.
- **Canvas** : The canvas decides the form look and has drag and drop area.

The following are the actions that can be performed in the form,

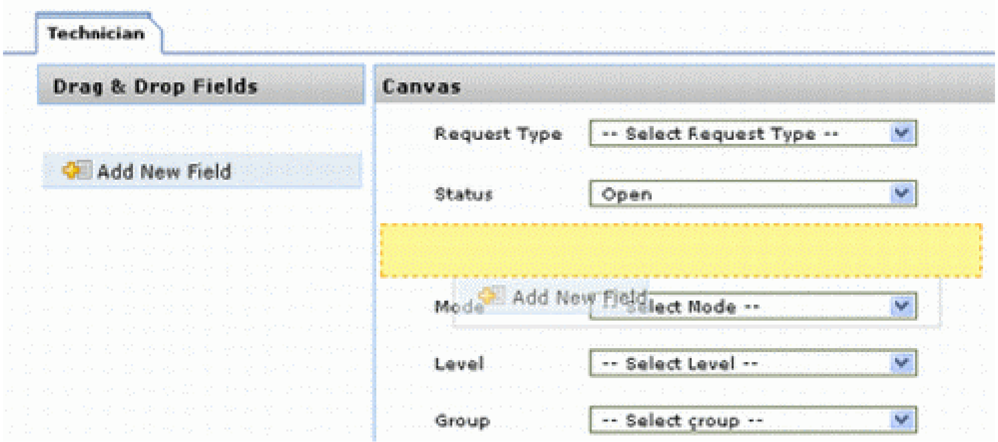
- Form Customization
  - Add New fields
  - Drag and Drop fields
  - Setting Field Property
- Request Preview
  - Technician View
  - Requester View
  - Add Tasks
- Edit Request Template
- Delete Request Template

## Form Customization

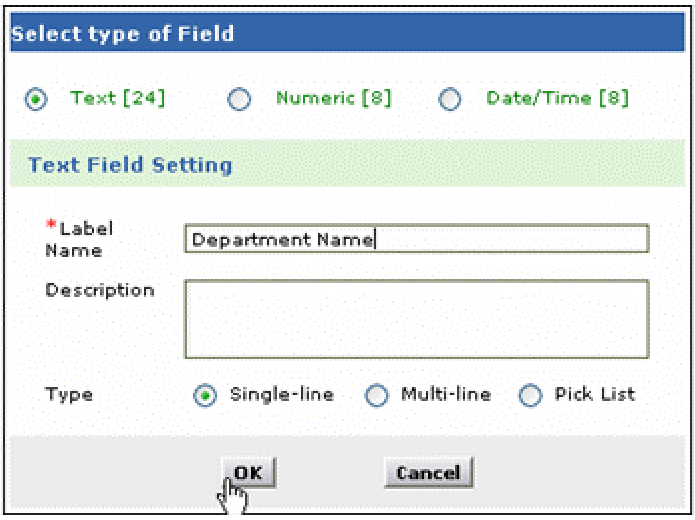
The layout of the form can be customized by, add/remove fields, set field properties and re-arrange the fields in the Canvas for a request template.

### Add New Field

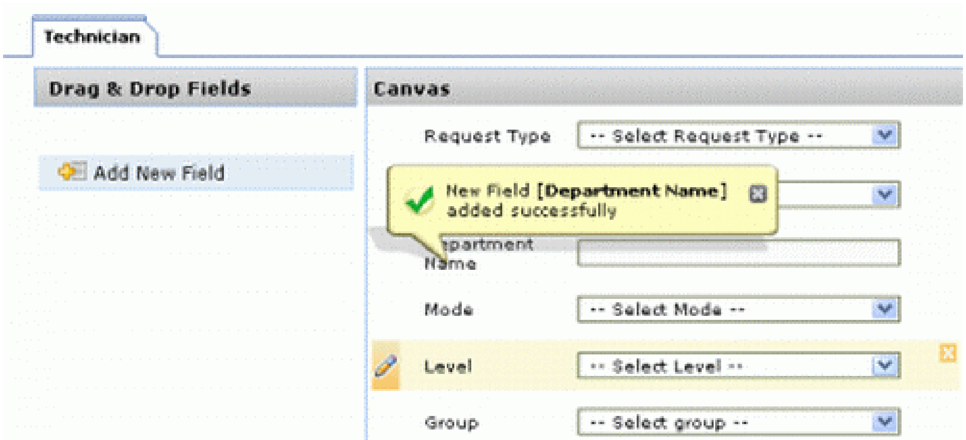
1. You can add new fields by dragging the **Add New Field** option under the Drag and Drop field on to the canvas.



2. This opens the **Add New Field** pop up window as shown below,




2. Select the **type of field** such as, text, numeric, by enabling the radio button beside it.
3. In the text field settings block, specify the **Label Name** in the field provided. This is mandatory field. If required, enter the significance of the field in the **Description** text field.
4. Select the **type of the text field** such as single-line, pick list.
5. Click **Ok**, the field gets added in the dragged place in the canvas with the above specifications.




The newly added fields are common for all the templates. The field name will also be same for all the templates. The newly added field can be edited or deleted only in **Request - Additional Fields**.

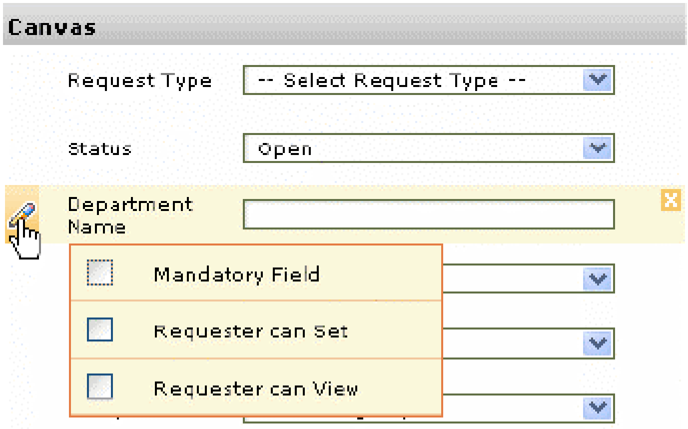
## Drag and Drop

1. Drag the field from the **Field List** and drop it onto the canvas. The drop areas will be highlighted. The dragged field can be dropped only in the highlighted area.
2. The fields in the form can also be re-arranged by dragging the field and placing it over an empty cell. The field can be placed only in the highlighted area. The request details can be moved as a whole block.
3. If you want to **Undo**/**Redo** the changes then click the corresponding buttons.

## Setting Field Properties

You can customize the fields such as, status, priority, mode by either changing the field properties, that is, making the fields mandatory or closing the fields. Thus you can customize the entire form by keeping the relevant fields in the canvas for a template. To customize the form,

1. Hover over the field, an Edit Field property and Field Close button will appears.
2. Click the **Edit Field Property** button. A drop down appears containing the options,




- **Mandatory Field** : The field can be made mandatory by enabling the check box adjacent to this option.
  ***Note***: If the Item field is marked as mandatory then the category and the sub category will automatically be marked as mandatory. Similarly if the Impact details is marked as mandatory then the Impact field will automatically be marked as mandatory.
- **Requester can Set** : On enabling this option, the requester can edit the fields. The 'requester can view' option automatically gets enabled.
- **Requester can View** : The requesters can only view the field and cannot set nor edit values on enabling this option.

Note: The fields such as request details, subject and description do not have field properties and hence can be only re-arranged in the canvas.

3. Click **Field Close** button to remove the field from the canvas and add it to the field list. The fields such as status, priority, description, subject and requester details does not have the Field Close option.

On customizing the form layout, the fields are pre filled with values. Click **Save**. The template gets added to the available list in the Request Template list view page. To save and add tasks for the template, click **Save and Add Task** instead of Save.

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

The request template will get populated under the **New Request** link 

. The created template is based on the **Default Template**. Click on the New Request link 

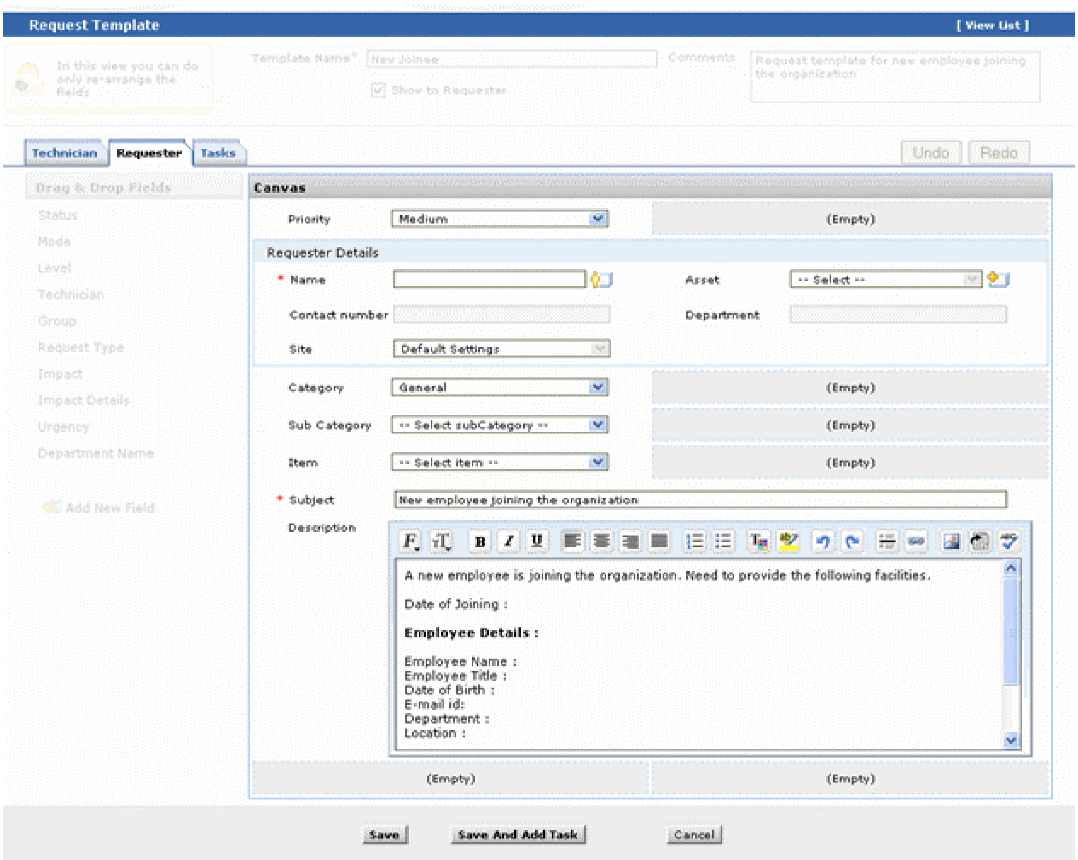
. This opens the Default Request Template form. This form cannot be deleted nor renamed. A request created through mail will also be based on this template.

## 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. From the Request Template list view page, click the Template name which you wish to preview. By default, the request template form for a technicians is opened. You can drag and drop fields in the canvas, re-arrange, add/remove and set properties for the field.
2. You can view the request template form for a requester if the **Show to requester** option is enabled. To view the request template form for a requester, click the **Requester** tab on the top left hand side of the page. The header section is grayed and hence is non editable. In the requester preview page, certain fields are hid from the requester while the rest of the fields can only be re-arranged.



3. You can view and add tasks related to the request template on clicking the **Tasks** tab. This displays the list of tasks for the template. You can add tasks by clicking **Add Task** button. To add task refer Add Task.

   **For ex** : The request template 'New Joinee' has a set of tasks to execute such as, enter his details in active directory, setting up his computer, settings up his location and so on, which needs to be entered under the Task tab. Hence the Schedule Start Time and End time and Actual start time and end time need not be specified.

## Edit Request Template

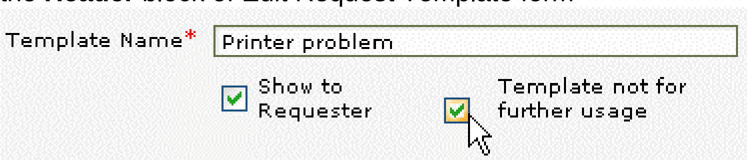
You can edit the request template and also have a preview of the request templates for a technician and a requester.

1. Click on the request template name from the request template list view page. By default, the request template form for a technicians is opened.
2. You can drag and drop fields in the canvas, re-arrange, add/remove and set properties for the field.
3. You can view the request template form for a requester if the **Show to requester** option is enabled. To view the request template form for a requester, click the **Requester** tab on the top left hand side of the page.
4. In the requester preview page, the fields can only be re-arranged. The header section will be grayed and hence will be non editable.
5. You can also view and add tasks related to the request by clicking on the **Task** tab. This displays the list of tasks for the template. You can also add tasks by clicking **Add Task** button.

## Delete Request Template

1. From the Request template list view page, enable the check box adjacent to the template which you want to delete.
2. Click **delete** button, a pop up window appears confirming the delete operation.
3. Click **Ok** to continue. The template gets deleted from the list. If the template is been used by a request then the template will be marked in grey indicating no further usage of the template in the request template list view page.

   To bring the form back to usage, disable' **Template not for further usage**' check box under the **Header** block of Edit Request Template form



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# 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.

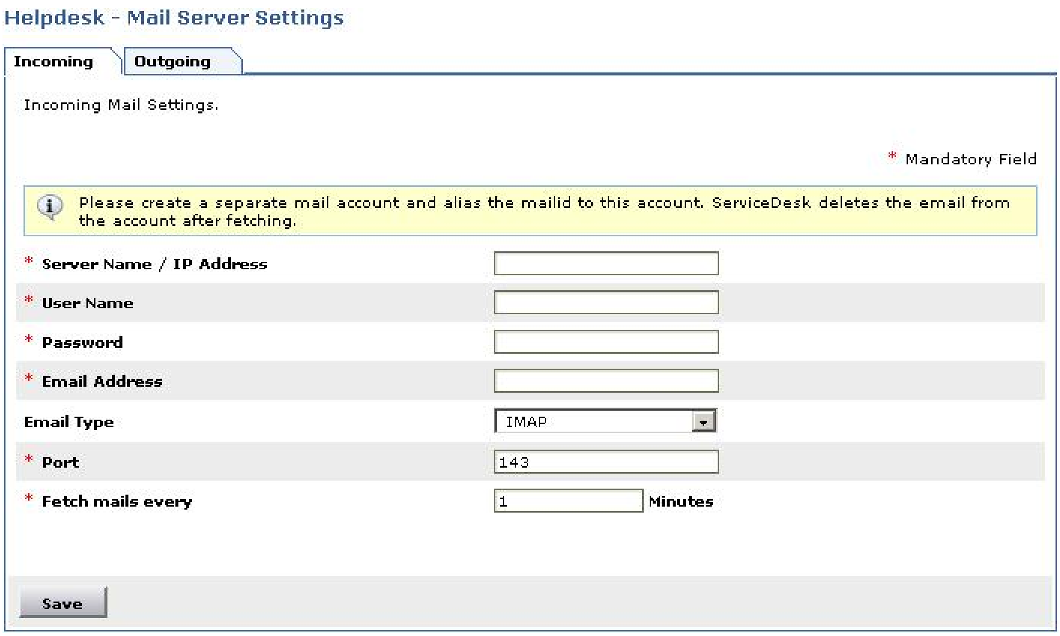
# Configuring Mail Server Settings

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.

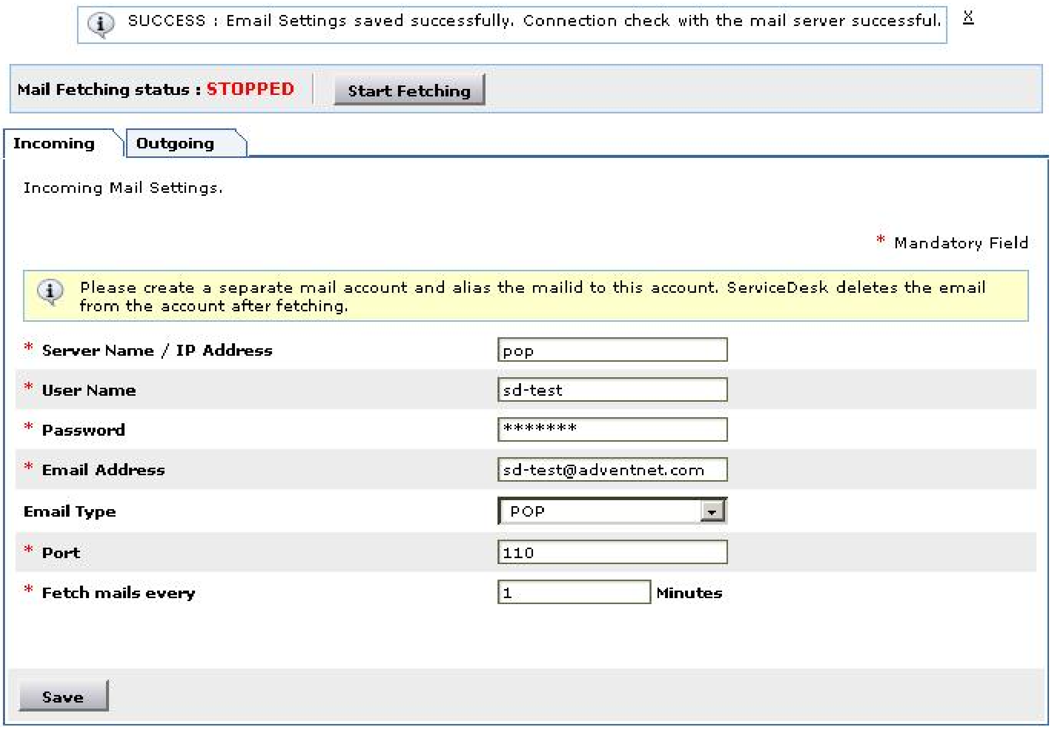
## Incoming Mail Settings

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:



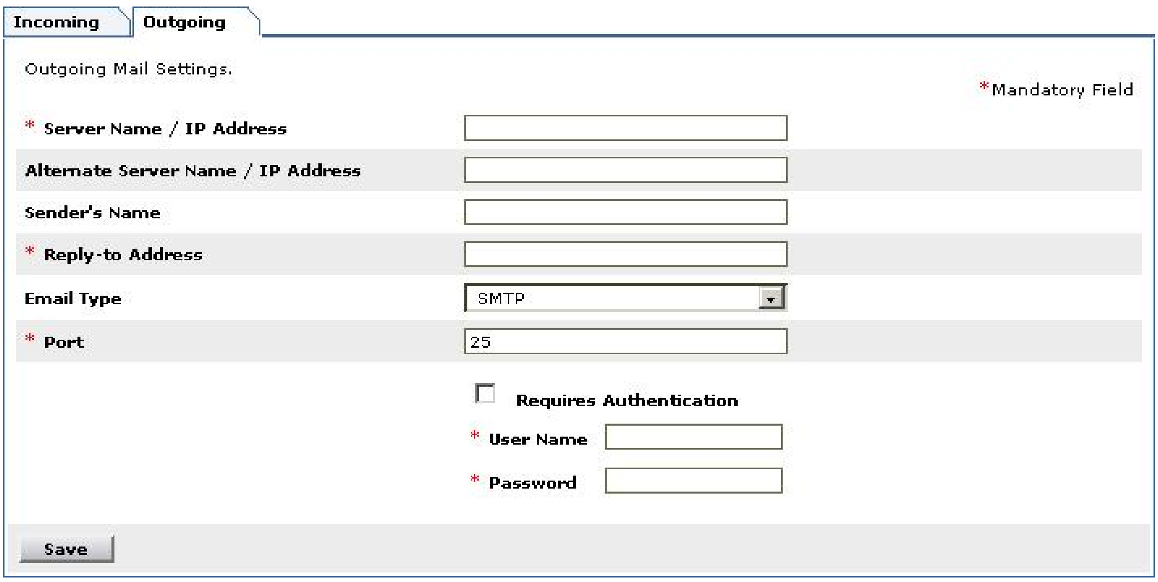

4. All the fields marked * are mandatory fields. Enter the server name, user name, password, e-mail address, port, and the time interval in which the mail needs to be fetched periodically. The time period is in minutes. The e-mail type is a combo box from which you need to select the value.
5. Click **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 Regions

Organizations can have various branches to handle various specialized activities. Such branches can be located at different regions 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 regions 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 **Organizational Details** block, click the **Regions** icon. The next page displays the available list of regions. You can add, edit, or delete regions.

## Add Region

To add a new region,

1. Click **Add New Region** link available at the top right corner of the **Region list** page.
2. In the **Add Region** form, enter the **Region Name**. This is mandatory field.
3. Specify brief description about the core activities taking place in the branch in the **Description** text field.
4. Click **Save** to save and return to the list view. Click **Save and Add New** a to save and add a new region. At any point, if you do not wish to add the region and would like to get back to the location list, click **Cancel**.

## Edit Region

To edit an already existing region,

1. In the **Region List** page, click the edit icon beside the **Region 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 region, if you wish to add another new region, then click **Save and add new** button instead of clicking **Save** button after making the changes.

## Delete Region

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

On deleting the region, the sites corresponding to the region along with the attributes such as groups, SLA, business rules, holidays and so on gets deleted.

# Configuring Sites

Organizations can have various branches to handle various specialized activities. Such branches can be located in different sites of a region and the data from each of these sites need to be maintained in the same place. You can configure various sites to a region in the ServiceDesk Plus application.

| | |
|---|---|
| | Note: The administrator has the privilege to create a site. The Site Admin can View/Edit/Delete the sites to which he is associated from the Site List page. |

## Add Site

To add new site,

1. Login to ServiceDesk Plus application using the username and password of the admin user..
2. Click **Admin** tab in the header pane.
3. In the **Organizational Details** block, click **Sites** icon. This opens the Site List page consisting of the lists of sites along with the regions.
4. Click **Add New Site** link on the right hand side corner of the site list table. This opens the Add Site details page.
5. Enter the **Site Name** in the respective text field. This is mandatory field.
6. Provide brief information in the **Description** field about what your organization does in the above mentioned site.
7. Select the **Region** and the **Time Zone** of the site from the combo box. The specified time zone will be essential in calculation the operational hours for the site. Hence the request raised in that site can be resolved within its operational hours.
8. Specify the **Address** of the organization along with City, Postal Code, State and Country.
9. Enter the **Contact Information** such as E-mail Id, Phone no, Fax no and the Web URL of your organization.
10. The site might have different operational hours, holidays and so on. In such a case, enable **Custom settings** radio button of the corresponding fields you would like to customize. You can also copy the default setting for the site by enabling the **Copy Default Settings** radio button.
    **Example** : Suppose an organization has many branches say, one in Chennai and the other in New York. Both have different operational hours and holidays, and thus have different SLAs. In such a case, enable the radio button corresponding to the options in Custom Settings for the site. This will not copy the default settings and hence you can add these attributes separately for the corresponding sites.

11. Click **Save** button to save the site details and return to the list view. Click **Save and add new** button to save and add another site. If you wish to cancel the operation then click Cancel.

## Edit Site

To edit a site,

1. From the site list page, click the edit icon beside the site which you wish to edit. This opens the Edit-Site page with the existing data.
2. You can modify all the fields in this page. Click **Save** to save the modified changes. Click **Save and Add New** to save and add another site.

## Delete Site

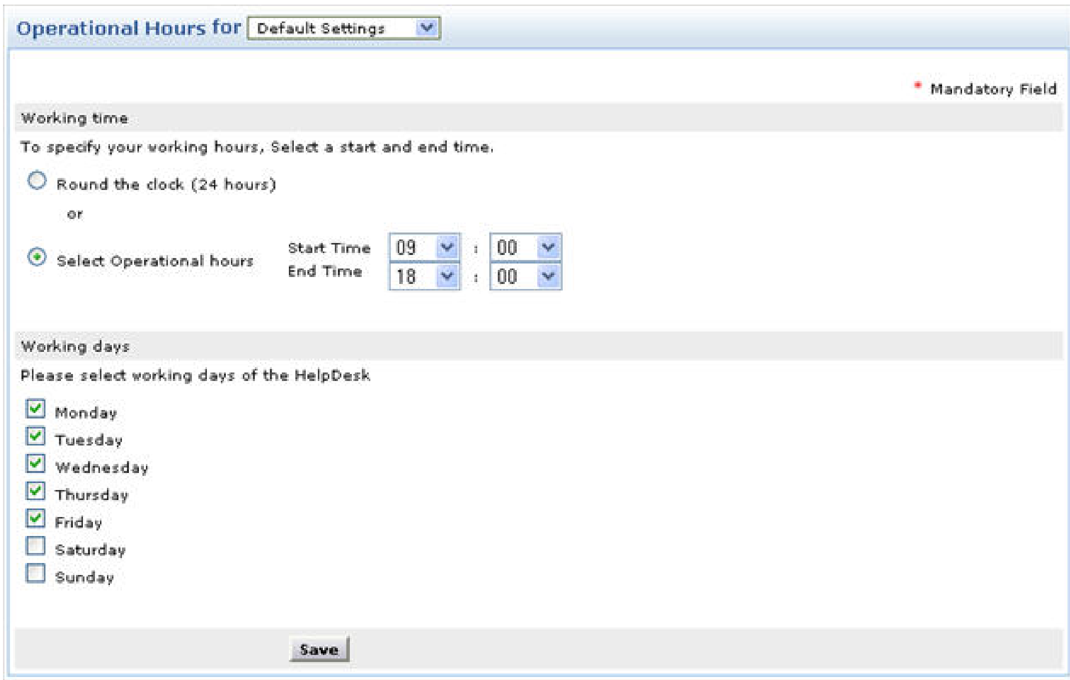
To delete site,

1. Click the delete icon beside the site which you want to delete from the site list page. A confirmation dialog appears
2. Click **Ok** to proceed. The site gets deleted from the list of available sites.

# Configuring Operational Hours

You can set the operational hours of your organization situated in various sites. The operational hours for a site depends on the time zone configured for that site. 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 **Organizational Details** block, click the **Operational Hours** icon. The **Operational Hours** form is displayed as shown below,




4. Select the site from the **Operational hours for** comb box. By default, the Operational hours for combo box will display **Default Settings**.

| | |
|---|---|
| | Note:The Site Admin can set the operational hours for the sites to which he is associated. The sites can be selected from the Operational Hours for combo box. The Operational hours for combo box will appear if the site is configured in Admin- Sites. |

5. If your organization works round the clock, then select **Round the clock (24 hours)** radio button. If you do not work round the clock then, select the radio button beside **Select Operational Hours**. Specify the working hours of your organization by selecting the **Start Time** and the **End Time** from the drop down boxes.
6. Now, select the days that your organization works by selecting the check boxes provided beside the days of the week.
7. Click **Save**.

You can also view the operational hours of a site by selecting the site from Operational Hours for combo box.

If you have already set the operational hours and 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 the holidays of your organization that is situated in various sites 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 weekly holiday when the firm does not function. You can also set repeated holidays such as, New Years Day, to an organization in a site. Thus by doing so you need not manually add the holiday every year in the Holidays option.

The holiday list along with the operational hours will be used for calculating the expected completion time of a service request, depending on the priority or SLA applicable to that request. To open the holiday 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 **Organizational Details** block, click the **Holidays** icon. This displays the **Default Settings** of the available list of holidays. You can add, view, edit, or delete holidays for a particular site.

Note: The Site Admin can add and view the holidays to the site which he is associated. To view the holidays in a particular site, select the site from the Holidays for combo box.

If the sites are not configured then the Holidays for combo box will not appear. To configure the sites refer Sites under Organizational Details block.

## Add Holidays

To add holidays in a site,

1. Select the site for which you want to add the holiday from the **Holidays for** combo box. If the sites is not selected then the holidays gets added under **Default Settings**.
2. Click **Add New Holiday** link available at the top right corner of the **holiday list** page. This opens the **Add New holiday** form.
3. Select the **Date** on which you want to add the holiday by invoking the calender icon. This is mandatory field.
4. Enter a brief description of the significance of the holiday in the **Description** text field.
5. If the holiday occurs every year such as, 25$^{th}$ December (Christmas), then enable **Check if this is recurring holiday** check box. This will automatically add the holiday every year for the site.
6. Click **Save**. If you do not wish to add the holiday and would like to get back to the holiday list, click **Cancel**.
7. 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. Select the site for which you want to edit the holiday from the **Holidays for** combo box. This lists out the holidays for the corresponding site.
2. Click the edit icon beside the holiday **Date** that you wish to edit.
3. Modify the date and the description of the holiday, and enable/disable the 'check if this is recurring holiday' check box in the **Edit Holiday** form.
4. Click **Save** to save the changes. At any point, if you wish to cancel the operation that you are performing, click **Cancel**.

## Delete Holidays

1. Select the site for which you want to delete the holiday from the **Holidays for** combo box. This lists outs the holidays in that site.
2. Enable the check box beside the holiday **Date** which you want to delete from the holiday list page. Click the **Delete** button on the left hand side of the page. A confirmation dialog appears.
3. Click **OK** to proceed with the deletion. If you do not want to delete the holiday, then click **Cancel**.

# Configuring Department

There can be various departments in an organization which can be situated in different sites and, each of these departments have a group of employees in them. In ServiceDesk Plus you can add, edit, or delete the various departments of your organization. These departments are essential while adding requesters and technicians since each requester or technician 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 **Organizational Details** block, click the **Departments** icon. This displays the available list of departments. You can add, edit, or delete departments.

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|---|---|
| | Note:The Site Admin can configure the department in the sites which he/she is associated. The list of departments associated to the site can be viewed by selecting the sites from the Departments for combo box. The Department for combo box will appear if the site is configured in Admin- Sites. |

## Add Department

To add a department for an organization in a site,

1. Select the site for which you want to add the department from the **Departments for** combo box. By default, the department gets added under **Default Settings**.
2. Click **Add New Department** link available at the top right corner of the **Department list** page. This opens the **Add Department** form.
3. Enter the **Department Name** in the text field. This is mandatory field.
4. Provide a brief **Description** about the department in the text field provided.
5. Click **Save**. 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**.

## Edit Department

To edit an existing department,

1. Select the site for which you want to edit the department from the **Departments for** combo box. This lists out the available departments corresponding to the site.
2. Click the edit icon beside the **Department Name** that you wish to edit. This opens the **Edit Department** form.
3. Modify the department name and its description.
4. Click **Save** to save the changes. At any point, if you wish to cancel the operation that you are performing, click **Cancel**.

## Delete Departments

1. Select the site for which you want to edit the department from the **Departments for** combo box.
2. Enable the check box beside the department name which you wish to delete from the department list page. Click **Delete** button. A confirmation dialog appears.
3. Click **OK** to proceed with the deletion. If you do not want to delete the department, then click **Cancel**.

# Configuring Business Rules

You can define Business rules to various sites of an organization. This 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 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 under the Default Settings. You can add, edit, or delete business rules of a particular site.

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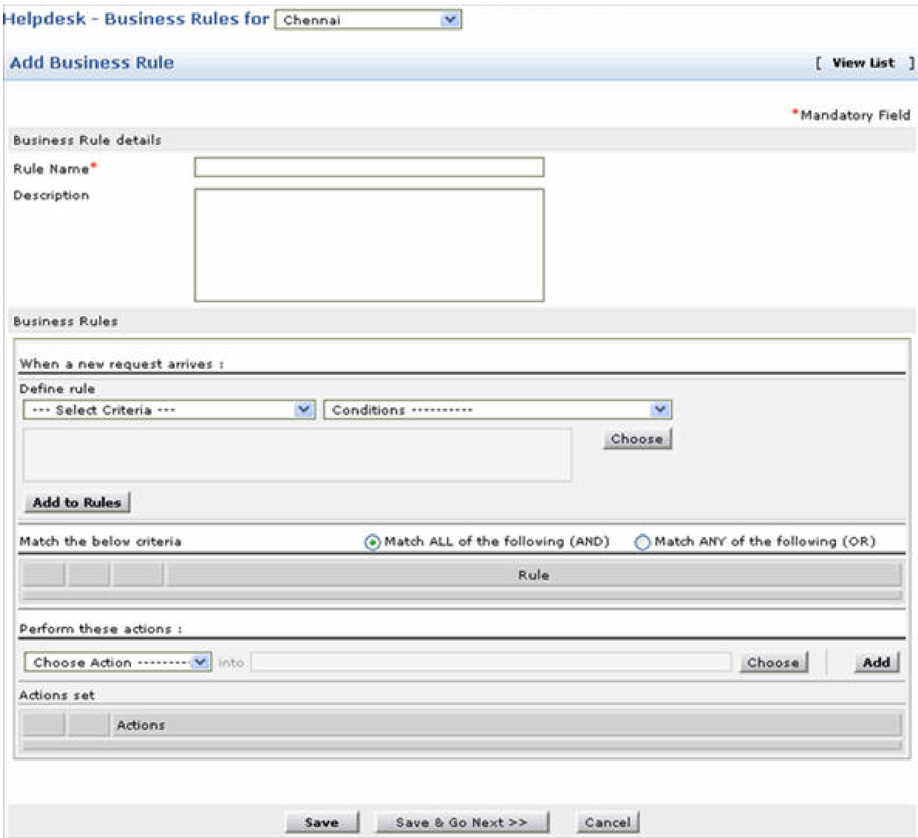
|---|---|
|  | Note: The Site Admin can add and view the business rules to the site which he is associated. To view the business rules of a site, select the site from the Business Rules for combo box. If the sites are not configured then the Business Rules for combo box will not appear. To configure the sites refer Sites under Organizational Details block. |

## Add New Business Rule

To add a Business Rule,

1. Select the site to which you want to add the business rule from the **Business Rule** for combo box. Click **Add New Business Rule** link available at the top right corner of the **Business Rules List** page. This opens the Add Business Rule page as shown below,



2. The Add Business Rule form consists of two blocks namely, Business Rule Details and Business rule.

**Business Rule Details**

- Specify the **Rule Name** in the given text field. This name has to be unique and is a mandatory field.
- Provide relevant information about the rule in the **Description** text field.

**Business Rule**

- Under this 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 **Save**.
  **For example:** If you want to match the requester name John, then select **Requester Name** in the Define rule combo box. Now select the condition **is** or **is not** from the drop down list. This list varies for 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 **Ok**. 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.
- Click **Add to Rules** to add the defined rule to the rules table.
- 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.
- Choose the action that needs to be performed on the request from the **Choose Action** drop down list.
- 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**.
- Click **Add**.

3. Click **Save**. If you want to add more than one business rule, then click **Save & Go Next >>.** 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 de-selecting 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 & Go Next >>** button.

## Delete Business Rule

1. From the **Business Rule List** page, enable the check box adjacent to the **Business Rule Name** that you wish to delete.
2. Click **Delete** button. A confirmation dialog is opened.
3. 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. Select the site form which you want to re arrange the order of the business rule from the **Business Rules for** combo box. 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 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 in a site. 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 **Organizational Details** 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.

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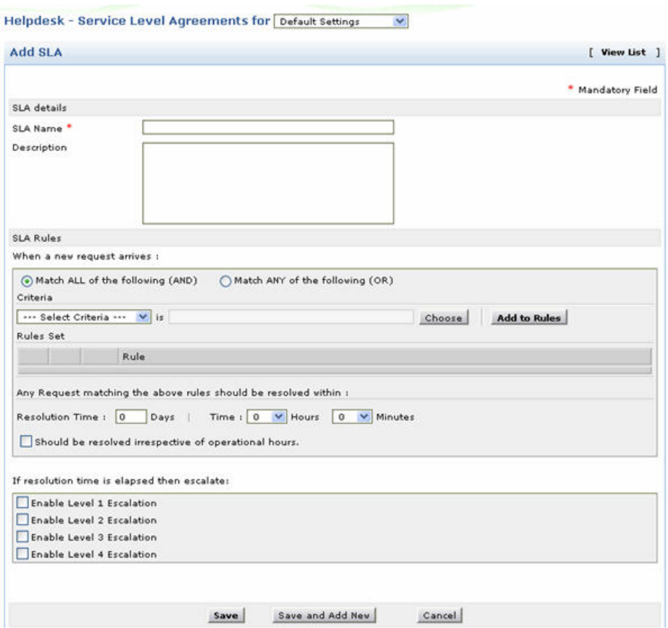
|  | Note: The Site Admin can configure the SLA for the sites to which he is associated by selecting the site from the Service Level Agreement for combo box. This lists out all the SLAs corresponding to that site. If the sites are not configured then the Service Level Agreement combo box will not appear. To configure the sites refer Admin-Sites. |

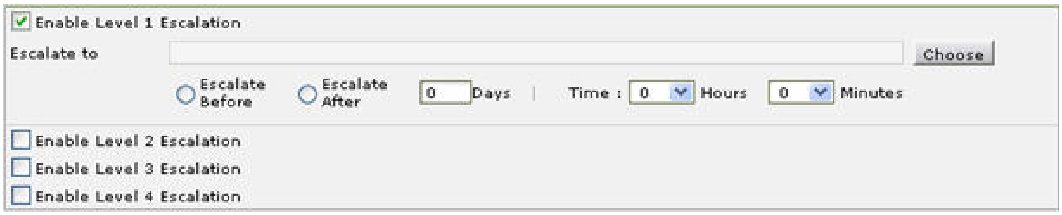
## Add New Service Level Agreement

To add an SLA

1. Select the site to which you want to add the SLA from the **Service Level Agreement for** combo box. Click **Add New SLA** link available at the top right corner of the **SLA list** page. This opens the Add SLA form as shown below,



2. Specify the **SLA Name** in the text field provided. This is a mandatory field.
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.
15. 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. Select the site of the SLA which you wish to edit from the **Service Level Agreement for** combo box. This lists out all the SLA corresponding to that site.
2. Click the edit icon beside the **SLA Name** that you wish to edit.
3. In the **Edit SLA** form, you can modify all the fields mentioned in the add SLA form.
4. 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. Select the site of the SLA which you wish to delete from the **Service Level Agreement for** combo box. The list of SLA corresponding to the site gets displayed.
2. Enable the check box adjacent to the SLA which you want to delete. Click the **Delete** button. A confirmation dialog appears.
3. 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 for a particular site by following the steps given below,

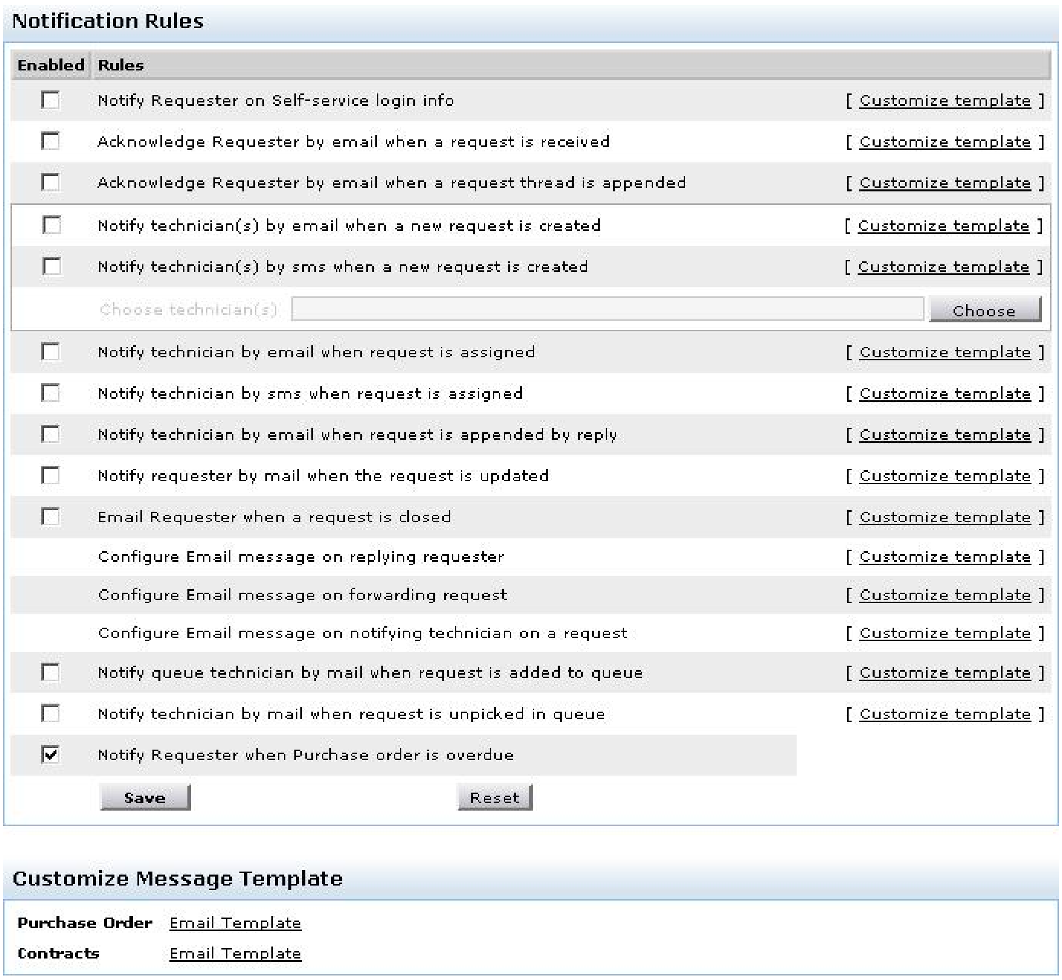
1. Click **Organize SLA** link available above the list of SLAs in the **SLA List** view. A pop-up window is opened with the list of available SLAs in the order that is appearing the list view.
2. Select an SLA, and click **Move up** or **Move Down** button beside the list.
3. Click **Save**.

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

# Configuring 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:

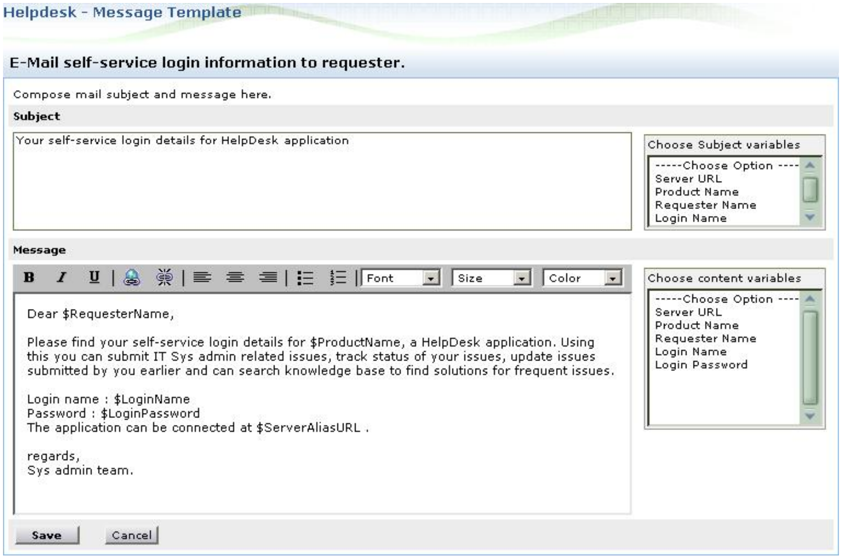
1. Login to the ServiceDesk Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Notification Rules** icon . The resulting page is as below:




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

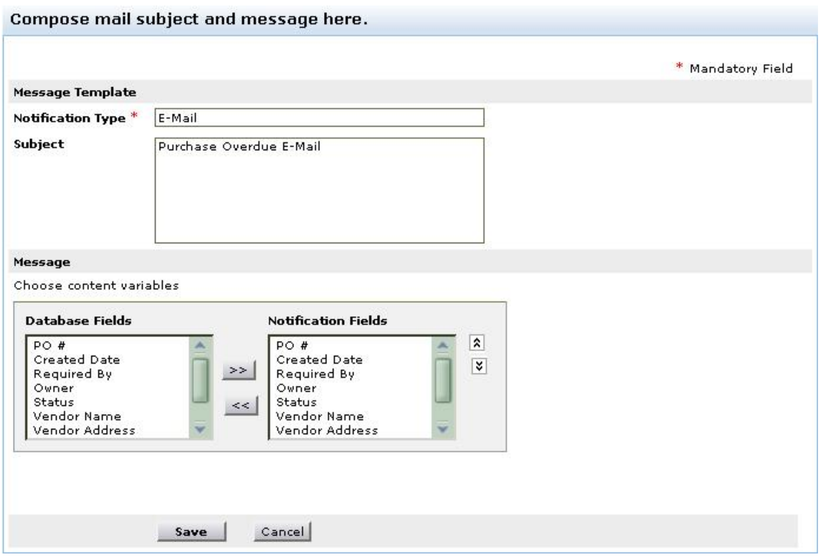
1. Click **Customize Template** link available beside the notification for which you wish to modify the content that is being sent. The resulting page is as below:




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.

# IT Services

You can list of all the available IT services in your organization using this option. All the affected IT Services on change will be selected from the list. The affected IT services list will be submitted to the CAB to infer the impact of the change also it can be recorded and used for future reference.

To Add New IT Service,

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 **IT Services** icon. This opens the Configuration Wizard page.
4. Click on the **New Service** link on the right hand side of the page. This opens the **Add IT Services** details page.
5. Specify the **Name** of the IT Service in the given text field. This is a mandatory field.
6. Specify the IT Service details in the **Description** field.
7. **Save** the changes.
8. **C**lick the **Save and add new** button to save the IT service and add another IT service.

# 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. Configuring Roles
2. Configuring Requester Additional Fields
3. Configuring Requesters
4. Configuring Technician Additional Fields
5. Configuring Technicians
6. Configuring Groups
7. Configuring Active Directory Authentication.
8. Configuring LDAP
9. Configuring Leave Type
10. Configuring Robo Technician

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 in your organization. The technicians accessing the application will have a defined role and hence have a defined set of tasks to execute. The roles for requesters is pre defined and hence roles configured in the Admin tab cannot be assigned to them. ServiceDesk Plus allows the administrator to configure the roles and assign these roles to the technicians using the application.

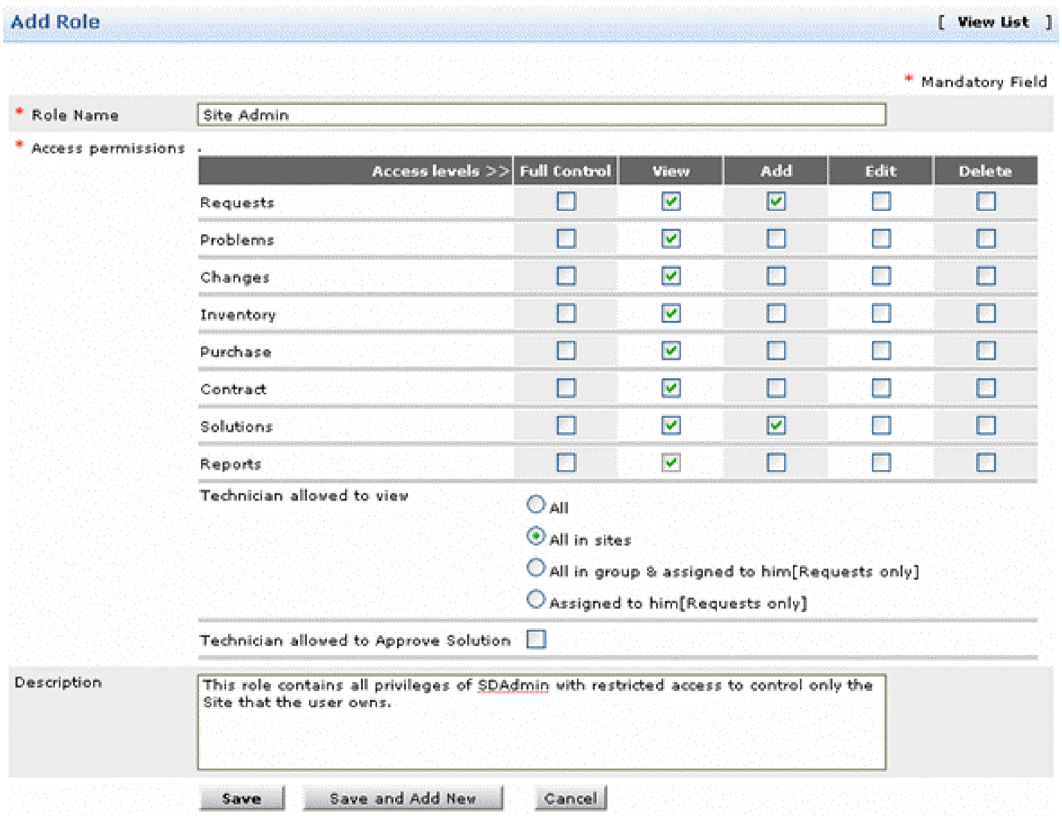
To open the role configuration page:

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. This opens the **Add Role** form.
2. Enter the **Role Name** in the given text field. The Role Name has to be unique and is a mandatory field.
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.



**Example**:If you want to provide add permissions for the requests and solution modules and only view permissions for the rest, select the check box below **Add** against the **Requests** 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:
    - **All** : The technician with this role can view all the requests and assets in ServiceDesk Plus.
    - **All in associated Site:** The Technician can view the requests and the assets of all his associated sites. To associate the site to the technician refer Technician.
    - **All in Group & assigned to him:** The technician will be restricted to view all the requests of the Group to which he/she belongs and also those requests that are assigned to him/her.
    - **Assigned to him:** The technician will be restricted to view the requests that are assigned to him/her.

      For ex : Site1 has two groups, say Group1 and Group2. Adam is a technician associated to group1 with **All in group & assigned to him** enabled, then he will be restricted to view all the requests in group1 and the requests assigned to him. He will have the privilege to re-assign the requests to technicians in his associated sites but once this is executed, the request will not be visible to Adam.

5. You can also provide permission to approve solutions in the role by enabling the check box beside **Technician allowed to Approve solution**. Thus the technician assigned with this role will be able to approve solutions.
6. Enter a brief description of the role in the **Description** field.
7. Click **Save**. If you want to add more just one role, click **Save and add new** button.

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**.

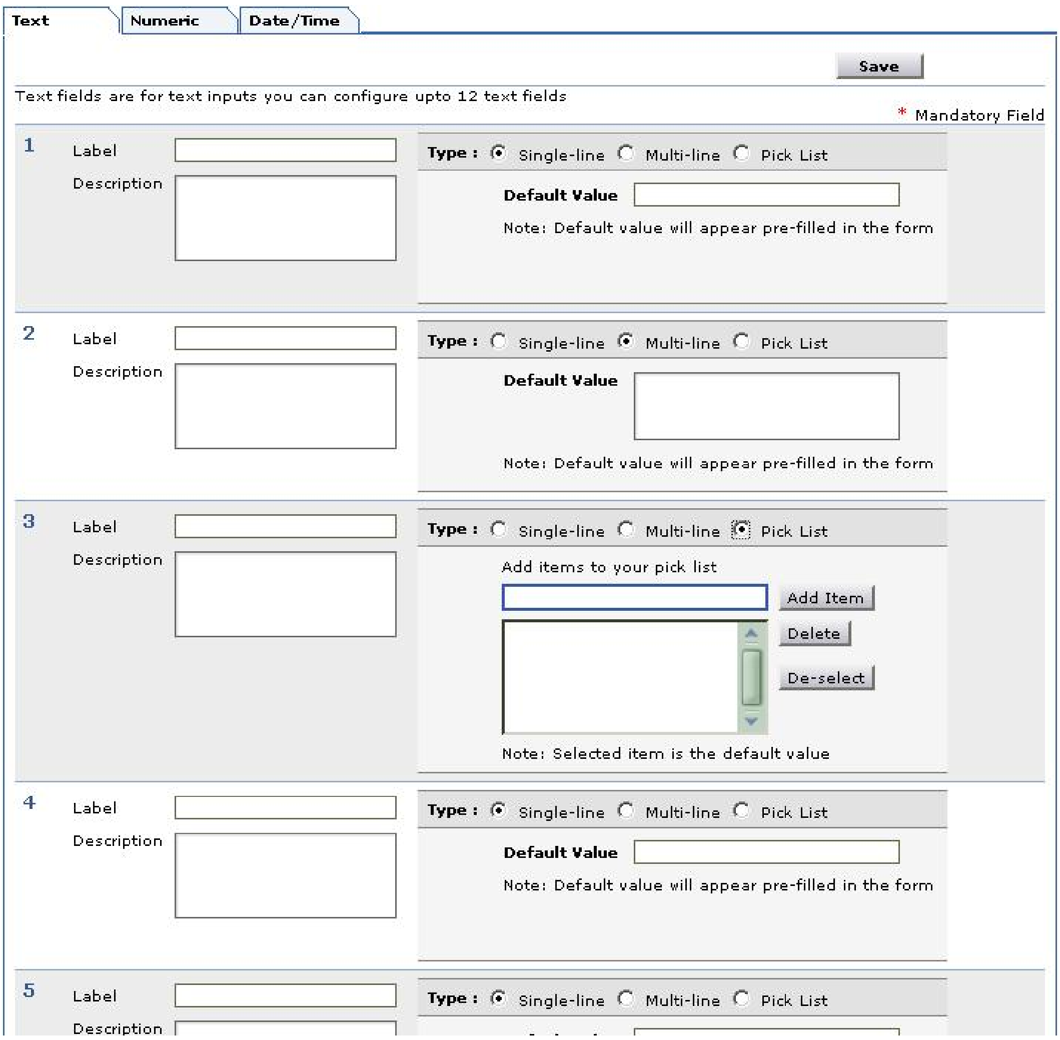
Note: You cannot edit or delete the SDAdmin and SDGuest roles that are already defined in the application. They are the default administrator and requester roles defined.

# 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. This opens the Add Requester form
2. In the Personal Details block, enter the **Full Name** and **Employee ID** of the technician. The name is a mandatory field. Specify any relevant information about the requester in the **Description** text 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. Specify the department details such as, **Site** and the corresponding **Department Name** to which the requester belongs from the combo box. The requester has an option to view, only his requests, all his department requests or all the requests in the site to which he is associated. Select the options from the **Requester allowed to view** combo box. Specify the **Job Title** of the requester in the field provided.
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. Certain requesters can also approve purchase order in an organization. Upon enabling the check box adjacent to **Purchase Order Approvers**, a link is sent to the requester to accept or reject the PO.
8. Click **Save**. If you want to add more than one requester then, click **Save and add new** button.

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.

## 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.

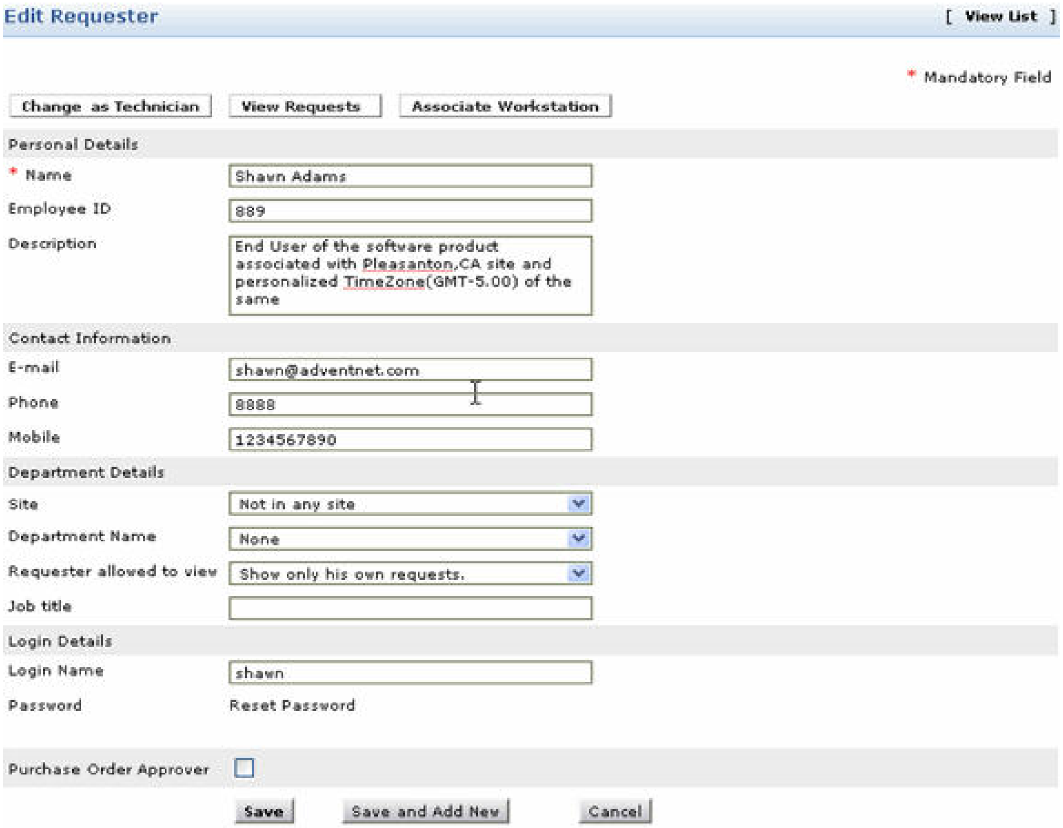
Note: Login name column will be the identifier for requesters. No two requesters can have the same login name. Hence the existence of a requester will be checked based on the login name value.

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.

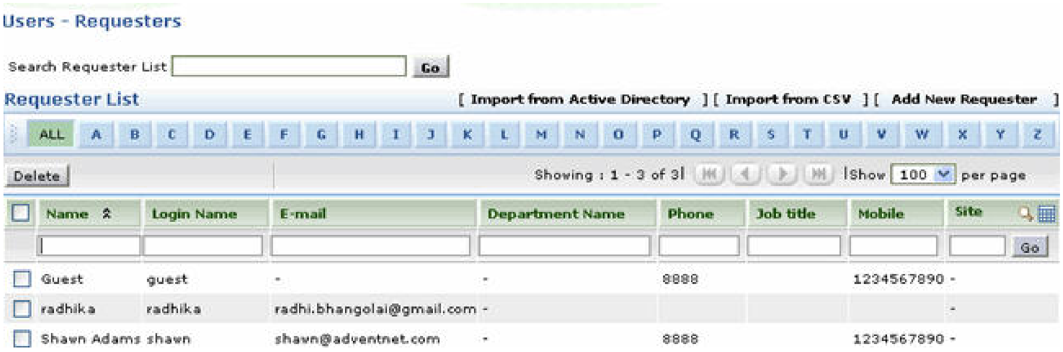
## Delete Requesters

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, disable the check box beside the column name.
3. To add a column to the list view, enable the check 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**.

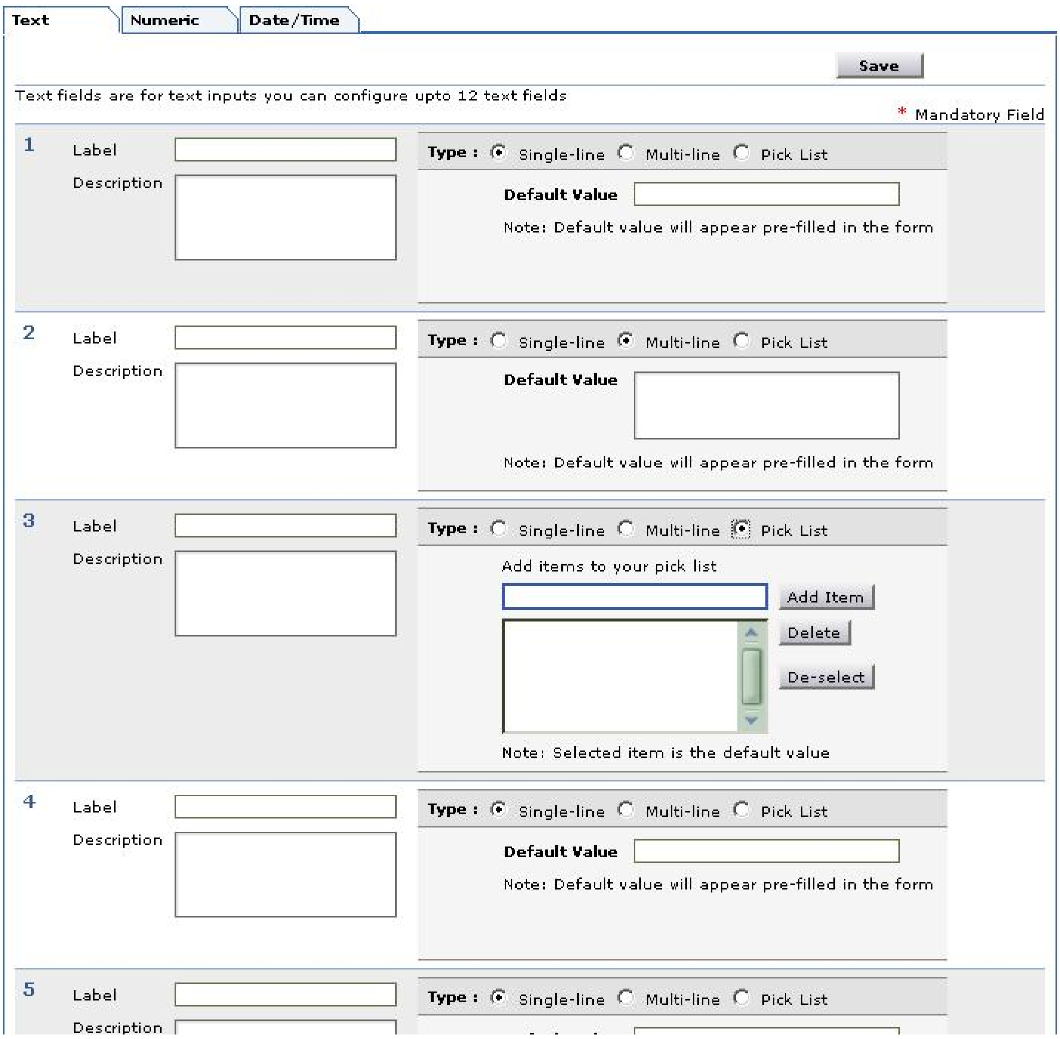
This will add only those columns which you have chosen in the list view. You can also sort the list view based on columns. To sort requester list by column, click the column header. Clicking it once will sort it in ascending order. Clicking twice will sort the column in descending order.

# 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 . 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 from a site 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. This opens the technicians list view page. Here you can add, edit, or delete technicians.

| | |
|---|---|
| | Note: The Site Admin can add and view the technicians of the site to which he/she is associated by selecting the site from the Technicians for combo box. The Technicians for combo box will appear if the sites are configured. The sites can be configured in Admin- Sites. |

## 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. This opens the **Add Technician** form.
2. 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** and **SMS Mail ID** of the technicain. 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 Name** to which the technician belongs and enter his/her **job title**.
6. You can associate multiple sites to a technician. Select the sites to which you want to associate the technician from the list of **Available Sites** and move it to **Associate Sites** by clicking **>>** button. Similarly you can also dissociate the sites. You can also associate/dissociate sites from the technicians in the Technicians list page.
   **Note**: If no site is associated to the technician, then **Not in any Site** automatically gets associated to that technician.
7. You can also assign Groups to the technician. Select the groups from the list of **Available Groups** and move it **Associated Group** by clicking **>>** button.
8. 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.
9. To provide login access to the technician with specific access privileges or enable administrative privileges for the technician, enable the check box beside **Enable Login for this technician**. This displays the Login Details block.
10. 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.
11. Now you need to assign a role to the technician, which will define his access privileges to various modules in the application.
    - If you want the technician to have complete administrator access then select the radio button, **Enable Administrator Privileges.** This option will not be available when a Site Admin logs in to the application using his login credentials.

- If you want the technician to have complete administrator access for the above selected sites then select the radio button, **Enable Administrator Privileges for the sites selected above**.
- Else, Enable Custom Privileges radio button and choose the roles from the list of **Available Roles** and move it to **Assigned Roles** by clicking **>>** button. 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.

12. Click **Save**. If you want to add more than one technician then, click **Save and add new** button.

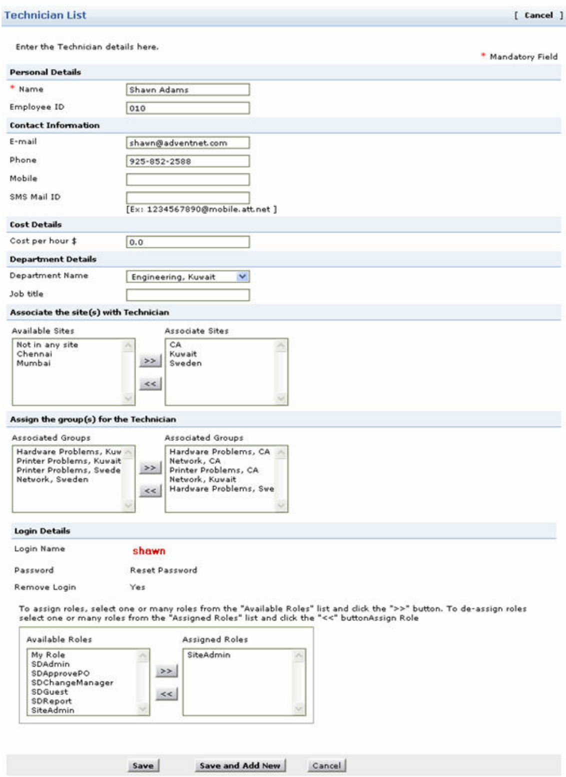
If you decide to give the login access for the technician at a later time, you can save the technician details without the login details. For this, you need to stop with the step 5 and click **Save**. Later you can add the login details by editing the technician details.

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. Select the site of the technician which you wish to delete from the **Technicians for** combo box. By default, the list of all the technicians is displayed. 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 shown 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 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. Click **Ok** to proceed. 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**.

## Associate Technicians to Sites

You can associate bulk technicians to sites using this option. If you have added the technician without associating the sites then the same can be done from the technicians list view page.

1. From the technicians list view page, enable the check box adjacent to the technician for whom you want to associate site.
2. Click **Actions** button --> **Associate to Site** option. The **Associate Technician(s) to site** pop up window appears.
3. Select the **Site** to which you want to associate the technician from the combo box.
4. Click **Associate** button. The technician gets associated to the site.

## Dissociate Technicians from Sites

You can dissociate bulk technicians from sites using this option. The added sites can also be dissociated from the technician from the technicians list view page.

1. From the technicians list view page, enable the check box adjacent to the technician for whom you want to associate/dissociate site.
2. Click **Actions** button --> **Dissociate from Site** option. The **Dissociate Techncian(s) from site** pop up window appears.
3. Select the **Site** from which you want to dissociate the technician from the combo box.
4. Click **Dissociate** button. A pop up window confirming the operation appears. Click **Ok** to proceed. The technician gets dissociated from the site.

Note: Dissociating the technicians from a site will remove all their traces from SLA, Business Rules and Groups associated to that site.

## Delete Technicians

1. Enable the check box beside the technician which you wish to delete from the **Technician List** page. Click the delete button. 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 Groups

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. This is mandatory 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. Enter the **Group E-mail id** in the given text field. Multiple e-mail id for a group should be separated by commas or semi colon and needs to be unique.
13. Specify the **Sender's Name** and the **Sender's E-mail** in the given text field. The senders name will be specified while sending e-mails.
14. 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 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 to enter ServiceDesk Plus.

**To configure the Pass - through Authentication,**

On enabling single sign-on, ServiceDesk plus directly authenticates your windows system user name and password . Hence you need not login over again to enter into ServiceDesk plus.

1. Enabling Active Directory, activates the Pass-through authentication **(Single Sign-on)** option.
2. If you like to activate single sign - on, select the **Enable Pass-through Authentication (Single Sign-On)** option.
3. Save the authentication. You will get a confirmation message on the authentication.

**Note**

- To enable single sign-on, enabled domain should be two way trusted.
- Single sign-on works only on Windows Internet Explorer.

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.

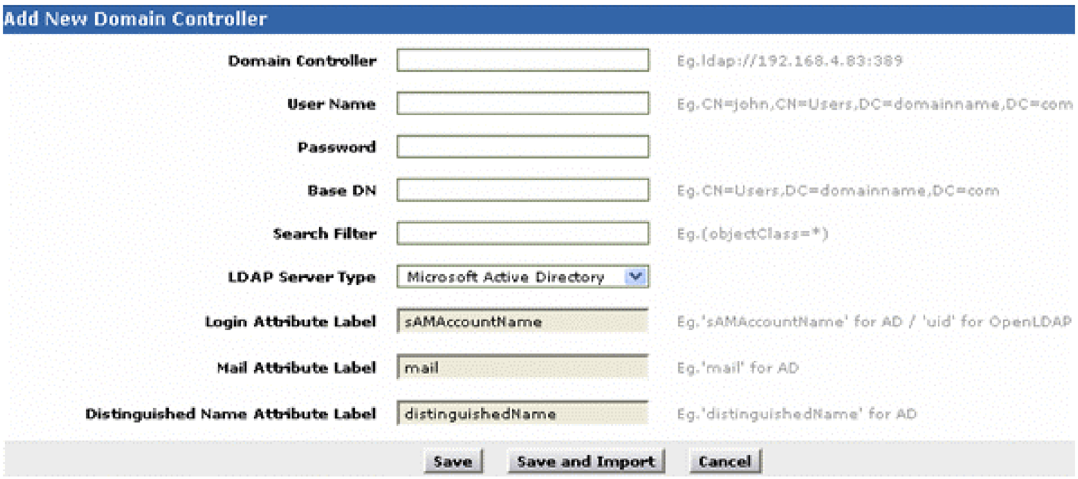
# Configuring LDAP authentication

You can also import users from the LDAP server through the domain controller. On enabling the LDAP authentication, the users can login using their LDAP credentials. By default, the LDAP authentication will be disabled.

Note: Ensure that before you start configuring LDAP authentication the users are already imported from the domain. The LDAP authentication supports both linux and windows users. On enabling LDAP authentication for windows users, the AD authentication gets disabled automatically.

To import users from a New Domain,

1. Login to ServiceDesk Plus application using your username and password.
2. Click the **Admin** tab in the header pane.
3. In the **Users** block, click the **LDAP Authentication** icon. By default, the LDAP authentication will be disabled.
4. Click **Add New Domain** button under Domain Controllers block. This opens the Add New Domain Controller form as shown below,




5. Specify the Domain Controller from where the users have to be imported in the **Domain Controller** text field. For ex: ldap://<server name>:<port number>. The default port is 389.
6. Enter the **User Name** along with the Organizational unit (OU) in the given field. For ex, CN:john, CN=Users, DC=domain name, DC=com.
7. Specify the **Password** in the respective field.
8. Specify the **Base DN** which represents the distinguished base name such as, CN = Users, DC = domain name, DC = com.
9. Specify the criteria which you want to apply on that particular domain controller in the search filter text field. For ex: mail=* will import users from the parameter mail in the specified domain controller.
10. Select the **LDAP Server Type** from the combo box. For ex. OpenLDAP.

Note: If you have chosen the Server type as default LDAP such as, Microsoft Active Directory, Novell eDirectory and OpenLDAP then the Login Attributes Label, Mail Attribute Label and Distinguished Name Attributed Label will appear in a non editable text.

11. If the LDAP Server Type is **Others** then, specify the **Login Attribute Label** and **Mail Attribute Label** in the respective fields.
12. The **Distinguished Name Attributed Label** is similar to the Base DN.
13. Click **Save** to save the domain controller. If you want to save and import the users, click **Save and Import.**

You can also import users from the existing domain by clicking **Import Now** of the corresponding Domain Controllers. The existing data will be over written on importing the users from the same domain. Once the users are imported, **Enable LDAP Authentication** by selecting the check box.

Click **Save**. The user can login to the application using his LDAP credentials.

## Edit Domain Controller

1. Click domain controller name which you wish to edit. This opens the Add new domain controller form.
2. Modify the changes and click **Save**. To save and import the users from the domain controller, click **Save and Import**.

## Delete Domain Controller

1. From the domain controller list view page, enable the check box adjacent to the domain controller which you wish to delete.
2. Click **Delete** button. A pop up window confirming the delete operation appears. Click **Ok** to continue. The domain controller gets deleted from the list.

On deleting a domain controller, the users imported from that domain controller will not be able to login to the application using LDAP credentials.

# Configuring Leave Types

Leave types is the type of leave taken by the technician such as sick leave, casual leave and so on. This is essential while marking leave for the technicians in Scheduler. You can configure the type of leave using **Leave Types** option. To open the leave type configuring page,

1. Login to ServiceDesk Plus application using your username and password.
2. Click the **Admin** tab in the header pane.
3. In the **Users** block, click **Leave Types** icon . This opens the Leave Types page

## Add Leave Type

1. Click **New Leave Type** link on the right hand side of the leave type list view page. This opens the **Add-Leave Type** form.
2. Enter the **Name** of the leave type in the given text field. For ex. Sick Leave, On Duty. The specified name has to be unique. This is mandatory field.
3. Specify brief description about the leave type in the **Description** text field.
4. Click **Save**. The leave type gets listed in the list view page. Click **Save and Add New** to save and add another leave type.

## Edit Leave Type

1. From the Leave Types list view page, click the edit icon beside the leave type which you wish to edit. This opens the **Update** page.
2. Modify the Name and the description field.
3. Click **Save**. You can also save and add another leave type from Update page by clicking **Save and Add New**.

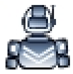
## Delete Leave Type

1. From the Leave Type List view page, enable the check box adjacent to the leave type which you wish to delete.
2. Click **Delete** button. A confirmation dialog appears.
3. Click **Ok** to continue. The leave type gets deleted from the list.

# 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.

# Problem / Change Management

The goal of Problem Management is to find the root cause of incidents and reduce the impact on business. The goal of Change Management is to control and manage approved changes with accepted risk. ServiceDesk Plus allows you to implement a comprehensive problem management and change management system. Problem/Change related configurations are:

1. Problem Additional Fields
2. Problem Closure Rules
3. Change Type
4. Change Status
5. Change Advisory Board
6. Change Additional Fields
7. Change Closure Rules

To access Problem/Change related configurations:

1. Log in to the ServiceDesk Plus application using the **user name** and **password.**
2. Click the **Admin** tab in the header pane. The problem/change management block is below the Help Desk block.

# Problem Additional Fields

You have pre-defined fields by default in the New Problem form to enter the details about the problem. If you need any additional fields in the New Problem form then, you can add your own additional fields using this option. You can add text, numeric and date/time fields in the form.

To add your own custom fields in the New Problem 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 **Problem/Change Management** block, click the **Problem - Additional Fields** icon. This opens the Problem - Additional Fields page. You can add three types of fields in the form: text, numeric and date/time.
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**. 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 Problem Details** in the **New Problem** 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 Problem form.

# Problem Closure Rules

Problem closing rules can be used to select the mandatory fields to be filled in by the technicians while closing the problems and also includes optional rules that can be enabled by the technician on closing the problem.

Example: If you have selected '**Associated Tasks should be closed**' as a mandatory field in this page, then the technician whoever resolving the problem, should close all the related tasks to a problem and enter the details in the corresponding field before closing it. Else an error message pops up, asking you to fill the details in the field. If you have selected the optional rules as, **E-mail all requesters affected by this problem** and **Close all associated incidents**, on closing the problem a pop up window listing the selected optional rules appears. Based on the incident the technician can enable the check box corresponding to the optional rules.

To configure the problem closing rules,

1. Login to the ServiceDesk Plus application using the **user name** and **password.**
2. Click the **Admin** tab in the header pane.
3. In the **Problem/Change Management** block, click the **Problem Closure Rules** icon. This opens the Problem Closure Rules page.
4. Select the **Mandatory Fields** from the list to be filled in before closing the problem by enabling the check box.
5. Select the **Optional Rules** by enabling the check box. The selected rules will get listed to the technician on closing the problem. Based on the incident the technician can,
    - **E-mail technician working on incidents associated with this problem** : An e-mail notification is sent to the concerned technicians working on the incident associated with the problem.
    - **E-mail all requesters affected by this problem** : An e-mail notification is sent to all requesters who have raised requests concerning the problem.
    - **Copy problem solution and workaround to all associated incidents** : The solution to the problem and workaround is copied to all associated incidents.
    - **Close all associated incidents** : All the associated incidents is closed on resolving the problem.
6. **Save** the details.

# Change Type

The change types shows the significant changes in the organization which involves cost and time. By default you have four change types and Standard is a pre-defined change type hence cannot be edited. And the Standard Change type is a pre-approved change type which will not require approval from the change manager.

To add a new Change Type,

1. Login to the ServiceDesk Plus application using the **user name** and **password.**
2. Click the **Admin** tab in the header pane.
3. In the **Problem/Change Management** block, click the **Change Types** icon. This opens the **Change Type list** page.
4. Click on the **New Change Type** link. This opens the **Add New** page.
5. Specify the **Name** for the change Type in the given text field, say **Significant.** This is a mandatory field.
6. Select the **Colour** by clicking the colour icon to indicate the severity of the change. This is a mandatory field.
7. Specify the **Description** about the change type in the description field.
8. **Save** the changes. You can see the change type getting listed in the change type list view.
9. **C**lick the **Save and add new** button to save the Change Type and add another Change Type.

# Change Status

Change Status shows the current state of the change in the organization. You have a list of default change status. Rejected is a pre-defined change status hence cannot be deleted.

To Add New Status,

1. Login to the ServiceDesk Plus application using the **user name** and **password.**
2. Click the **Admin** tab in the header pane.
3. In the **Problem/Change Management** block, click the **Change Status** icon. This opens the **Status List** page.
4. Click on the **New Status** link on the right hand side of the page. This opens the **Add Status** page.
5. Specify the **Name** of the status in the given text field.
6. Specify the **Description** about the status in the given text field.
7. **Save** the changes. You can see the new status getting listed in the status list page.
8. Click the **Save and add new** button to save the Change Status and add another Change Status.

# Change Advisory Board

The Change Advisory Board (CAB) is a body that exists to approve changes and to assist Change Management in the assessment and prioritisation of changes. The members of the CAB are selected based on their expertise and capability to assess change adequately from business and technical point of view.

To add new a CAB,

1. Login to the ServiceDesk Plus application using the **user name** and **password.**
2. Click the **Admin** tab in the header pane.
3. In the **Problem/Change Management** block, click the **Change Advisory Board** icon. This opens the **Change Advisory Board (CAB)** page.
4. Click **New CAB** button. This opens the Add CAB page.
5. Specify the **Name** of the CAB in the given text field.
6. Select the members of the CAB from the technicians list and move it to the members list using >> button.
7. Specify the **Description** of the CAB in the description field and save the changes.
8. Click the **Save and add new** button to save the CAB and add another CAB.

# Change Additional Fields

You have pre-defined fields by default in the New Change form to enter the change details in the form. If you need any additional fields in the New Change form then, you can add your own additional fields using this option. You can add text, numeric and date/time fields in the form.

To add change additional fields,

1. Login to the ServiceDesk Plus application using the **user name** and **password.**
2. Click the **Admin** tab in the header pane.
3. In the **Problem/Change Management** block, click the **Change Additional Fields** icon . This opens the **Change Additional Fields** page. You can add three types of fields in the form: text, numeric and date/time.
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 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**. 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 Change Details** in the **New Change** 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 Change form.

# Change Closure Rules

Change closing rules can be used to select the mandatory fields to be filled in by the technicians before closing the changes.

**Example:** If you have selected **Impact** as a mandatory field, then the technician whoever doing the change, should enter all the impact details of the change before closing it. Else an error message pops up, asking you to enter the details of the impact in the corresponding field.

To select the mandatory fields,

1. Login to the ServiceDesk Plus application using the **user name** and **password.**
2. Click the **Admin** tab in the header pane.
3. In the **Problem/Change Management** block, click the **Change Closure Rules** icon . This opens the Change Closure Rules page.
4. Select the mandatory fields for closing the change from the list by enabling the check box.
5. Save the details.

# 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. Software Types
7. Software Category
8. Resource State
9. Scan for Windows PCs
10. Scan for Linux PCs
11. Audit Settings

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 to associate vendor with the product. This opens the Associate Vendor page.
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 **Save** to save the details. 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**.

# Workstation Additional Fields

You can define your own organization specific fields that need to appear in the new workstation form apart from the default fields. You can add text fields, numeric fields, and date/time type fields in the form.

## Adding Workstation Additional Fields

### Configuring Additional Text fields

1. Click on Admin tab -> Click Workstation Additional Fields icon in the Configuration Wizard page. This opens Workstation – Additional Fields page. You can configure 12 additional text fields for a workstation.
2. By default the list of all additional text fields are displayed. Specify the **Label** for the Workstation Additional Fields.
3. Specify any relevant information about the additional fields in the **Description** text field.
4. Specify the **Type** of the text field by enabling the radio button. It can be either **Single- Line, Multi – Line or drop down menu list.**
5. Specify the **Default Values** in the given text field.
6. Click **Save** to save the settings.

### Configuring Additional Numeric fields

1. Click on the Numeric tab. You can configure 4 additional numeric fields for a workstation.
2. Specify the **Labe**l for the additional field. This is a mandatory field.
3. Specify any relevant information about the additional fields in the **Description** text field.
4. Click **Save** to save the settings.

### Configuring Additional Date/Time fields.

1. Click on the Date/Time tab. You can configure 4 additional fields for a workstation.
2. Specify the **Label** for the additional field. This is a mandatory field.
3. Specify any relevant information about the additional fields in the **Description** text fields.
4. Click **Save** to save the settings.

# Asset Additional Fields

You can define your own organization specific fields that need to appear in the new asset form apart from the default fields. You can add text fields, numeric fields, and date/time type fields in the form.

## Adding Asset Additional Fields

**Configuring Additional Text fields**

1. Click on Admin tab -> Click Assets Additional Fields icon in the Configuration Wizard page. This opens Assets – Additional Fields page. You can configure 12 additional text fields for an asset.
2. By default the list of all additional text fields are displayed. Specify the **Label** for the asset additional fields.
3. Specify any relevant information about the additional fields in the **Description** field.
4. Specify the **Type** of the text field by enabling the radio button. It can be either **Single- Line, Multi – Line or drop down** menu list.
5. Specify the **Default Values** in the given text field.
6. Click **Save** to save the settings.

**Configuring Additional Numeric fields**

1. Click on the Numeric tab. You can configure 4 additional numeric fields for an asset.
2. Specify the **Label** for the additional field. This is a mandatory field.
3. Specify any relevant information for the additional fields in the **Description** field.
4. Click **Save** to save the settings.

**Configuring Additional Date/Time fields.**

1. Click on Date/Time tab. You can configure 4 additional fields for an asset.
2. Specify the **Label** for the additional field. This is mandatory field.
3. Specify any relevant information for the additional fields in the **Description** field.
4. Click **Save** to save the settings.

# Adding Software Type

All different forms of software such as, licensed, prohibited, freeware, shareware, excluded and un-identified software comes under this category.

To Add New Software Type,

1. Log in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Admin** tab in the header pane. This opens the Configuration Wizard page.
3. Under the Asset Management block, click the **Software Type** icon. This opens the **Software Type list** page. By default you have list of six software type in ServiceDesk Plus. These default software cannot be edited or deleted.
    - **Shareware:** Software that is available free of charge, may be distributed for evaluation with a fee requested for additional features or a manual etc.
    - **Freeware:** Software that is provided without charge.
    - **Prohibited:** Software that is prevented from use.
    - **Excluded:** Software that is omitted from use.
    - **Managed:** All licensed software comes under this software type.
    - **Un-Identified:** Unknown softwares can be categorized under this software type.
4. Click the **New Software Type** link on the right hand side of the page. This opens the Software Type Details page.
5. Specify the **Software Type** name in the given text field. This is a mandatory field which will uniquely identify individual software type.
6. Specify any relevant information about the Software Type in the **Description** field.
7. Click **Add Software Type** button. This adds the software type to ServiceDesk Plus and gets displayed below the add software form.

# Adding Software Category

Different groups of software such as, software used for Accounting, Internet, Graphics, Multimedia, Operating System and so on are added to ServiceDesk Plus using this option.

To Add New Software Category,

1. Login in to ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Admin** tab in the header pane. This opens the configuration wizard page.
3. Under the Asset Management block, click the **Software Category** icon . This opens the Software Category list page. By default you have nine software categories displayed in ServiceDesk Plus.
4. Click **New Software Category** link on the right hand side of the page. This opens the **Software Category Details** page.
5. Specify the **Software Category** name in the give text field. This is a mandatory field.
6. Specify any relevant information about the category in the **Description** field.
7. Click **Add Software Category** button to add the software category to ServiceDesk Plus. The added software category gets displayed below the form.

# Adding Resource State

Resource can be categorized based on its current status in the organization. Ex: Resource In Use, In Store, Expired and so on.

To Add New Resource State,

1. Click the **Admin** tab in the header pane. This opens the Configuration Wizard page.
2. Under the Asset Management block click the **Resource State** icon. This opens the Resource State list page.
3. Click the **New Resource State** link on the right hand side of the page. This opens the **Resource Sate Details** page. By default you have five resource state available in ServiceDesk Plus. You cannot edit or delete the resource state.
4. Specify the **Resource Sate** name in the given text field. This is a mandatory field.
5. Specify any relevant information about the resource state in the **Description** field.
6. Click **Add Resource State** button to add the resource to the application.

# Windows Domain Scan

ManageEngine AssetExplorer automatically discovers all the Windows Domains in your network. You can select any or all of the listed domains and discover workstations listed under the domain by providing the required login name, domain controller and password. To add a new domain,

## Add A New Domain

1. Click on Admin tab -> Windows Domain Scan icon  in the Configuration Wizard page. This opens the Domain view list page.
2. Click on **Add New Domain** link on the right side corner of the Domain view list page. This opens Add Domain page.
3. Specify the **Domain Name** in the given field. For ex. Acme. This is a mandatory field, which uniquely identifies the domain from the network.
4. Specify the **Domain Controller Name**. This is the host name for the domain controller and the organizational units are listed only if the domain controller name is provided. For ex. winkmaster.
5. Specify the **Login Name**. This is the user login name. For ex. Administrator
6. Specify the **Password** for the user.
7. Provide any relevant information pertaining to the domain details in the **Description** field.
8. Click **Save** button to save the details. Click **Save and Add New** button to save the domain and add another domain. You can see the domain getting listed in the domain view list.
9. Click Cancel button to cancel the details.

| | |
|---|---|
|  | Note: For the workstation scan to execute successfully the following things need to be true: WMI needs to be enabled in the workstation where the Asset Explorer server is running. COM/DCOM service needs to be switched on in all the workstations belonging to the windows domains.. |

## Scan Domains

1. Click on Scan menu on the right side of the page -> Click Windows Domain Scan sub menu to go to the domain view list page. (Or) Select Admin tab -> Click Windows Domain Scan to go to the domain view list page.
2. Click Scan Domain icon  of the particular domain to discover all workstations under the Windows Domain. This brings up the Domain Scan Wizard page.
3. Choose the Organizational Units for which you want to import and guide you through the scan by enabling the check box.
4. Click **Start Scanning** button to start the scanning process. You can get the complete reports of the scan, with successful and failed workstation list.

# Network Scan

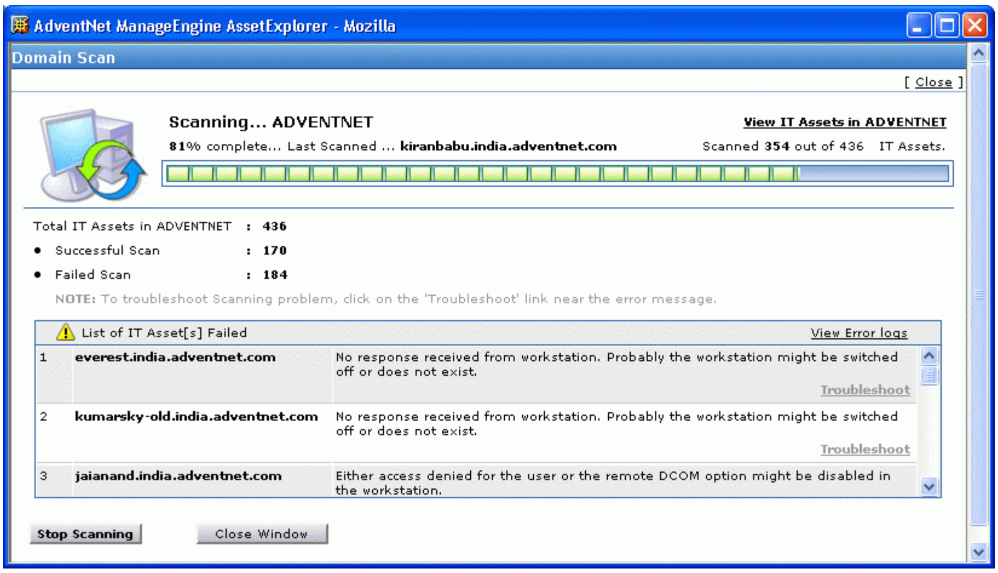
Network scan allows you to discover networks that are part of your enterprise. These networks are scanned for Linux machines and other IP based IT assets ex: printers, routers, switches etc and they are grouped under this network.

## Add New Network

1. Click on **Admin tab** -> Network Scan icon  in the Configuration Wizard page. This opens the Network view list page.
2. Click on **Add New Network** link on the right side corner of the Network view list page. This opens Add Network page.
3. Specify the Network Address in the given field. For ex. 192.168.27.0, this is a mandatory field, which uniquely identifies the network address.
4. Specify the **Login Name** in the given text field. This login name should have telnet access across all machines in the organization. For ex. Administrator.
5. Specify the **Password** for the user.
6. Specify the **Community String** for the network address, ex: public or private
7. Provide any relevant information pertaining to the network details in the **Description** field.
8. Click **Save** button to save the details. Click **Save and Add New** button to save the network and add another network. You can see the network address getting listed in the network view list.
9. Click **Cancel** to cancel the details.

## Scan Domains

1. Click on Scan menu on the right side of the page -> Click Network Scan sub menu to go to the network view list page. (Or) Select Admin tab -> Click Network Scan to go the view list page.
2. Click Scan Network icon  of the particular network to discover all network in the organization. You can get the complete reports of the scan, with successful and failed workstations.



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

## 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**.

# Audit Settings

Audit settings help you to schedule periodic scanning of your network and enable regular cleanup of scanned information and set re-scanning interval for scanning workstation.

## Enable Scheduled Scan

1. Click on Admin Tab -> Click Audit Settings icon in the configuration wizard page. This opens Audit Settings form.
2. Select **Enable Scheduled Scan** check box to configure regular scanning of the workstations.
3. Set the **Date and Time** (hours & minutes) for scanning of workstations.

Select any of the 5 radio buttons below the Enable Scheduled Scan sub-heading explained below:

**Scan Once**

Select the date on which you want to scan your network using the calendar icon. And set the time to scan on the chosen date.

**Daily Scan**

Select the time (hours and minutes) from the combo box to scan workstations on a daily basis. Then select the date from the calendar button to schedule scans.

**Weekly Scan**

In the weekly scan option, you can also choose to schedule a daily scan. Select **Everyday** checkbox to enable scan on all the days of the week. Or select the check box beside a particular day of the week. Then set the time (hours and minutes) of the scan to start the scanning process on the selected day of the week.

**Monthly Scan**

In the monthly scan option select the check box **Every Month** to scan every month throughout the year. Or you can also choose the months you want to scan by selecting the check box beside the name of the months.

In the monthly scan option you can also choose to schedule a weekly scan by selecting the radio button Day, and specifying the scanning day of the week from the combo box. Or select the Date radio button and specify the date from the combo box.

Finally select the time (hours and minutes) of the scan.

**Periodic Scan**

You can enter a random period of time to repeat the scan. Enter the number in the field provided. The scan will be performed on every specified nth day. Where n is the number you enter in the field. The default value is 7th day.

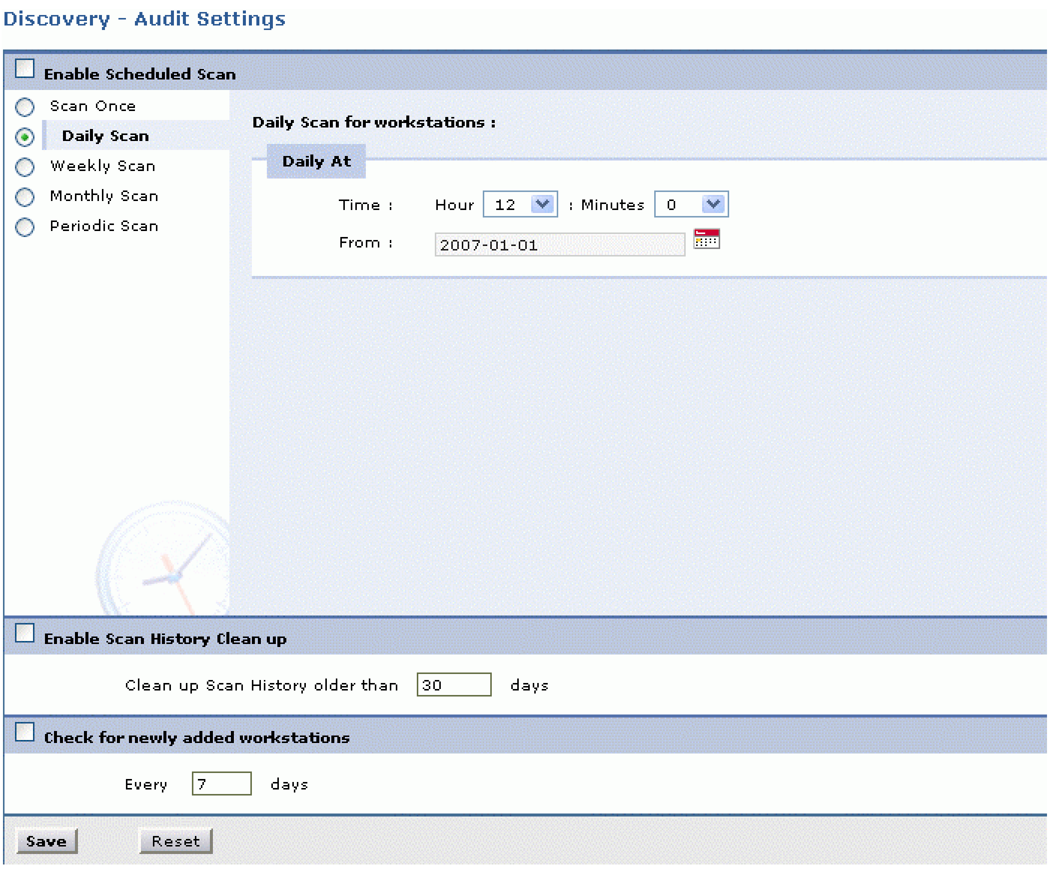
### History Clean up

You can enable regular cleanup of scanned information, by selecting the Enable Scan History Clean up check box and enter the number of days in the field provided for deleting the scanned information.

## Newly Added workstations

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

Once the details are specified save the changes. Click Reset button to reorganize the settings.



# 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

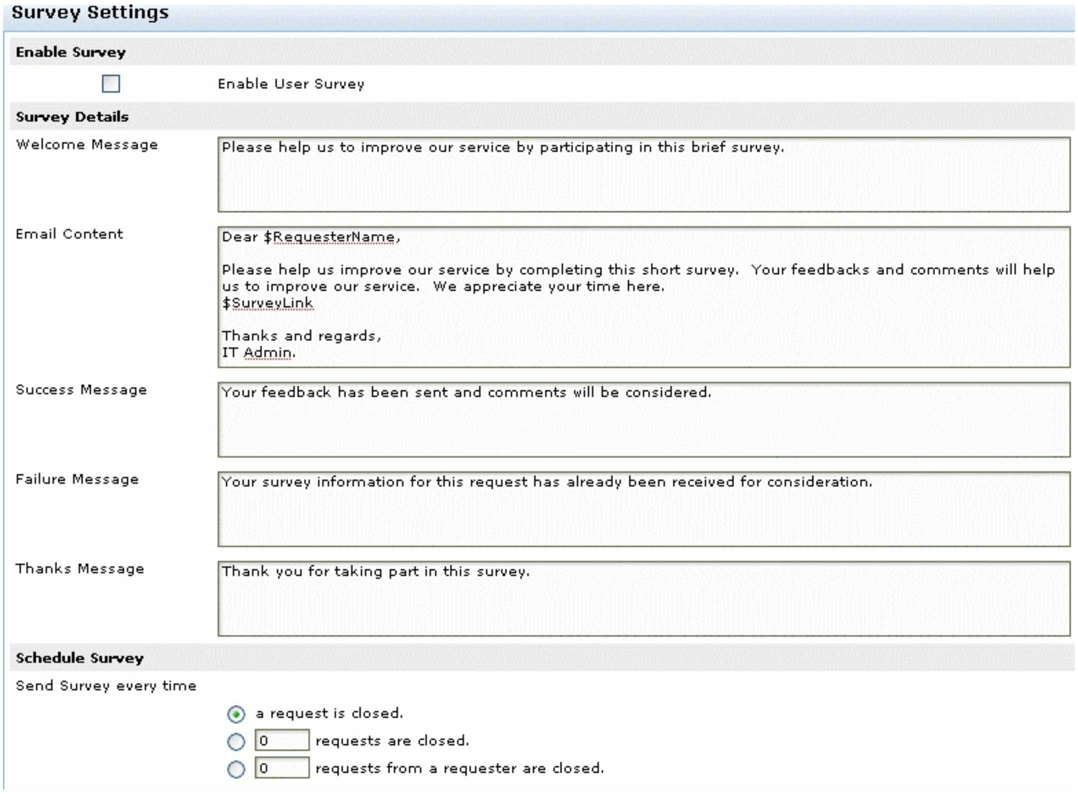
1. Log in to the ServiceDesk Plus application using the **user name** and **password** of a ServiceDesk Plus administrator.
2. Click the **Admin** tab in the header pane. The **User Survey** block is below the Users block.

# 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 Self Service Portal Settings

Self-Service Portal settings has ten different settings to be configured in ServiceDesk Plus such as, Default Currency, Display Language, My Reminders, Requester List, Dynamic User Addition, Alias URL, Customize ServiceDesk and so on.

To open the self service portal 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 Self Service Portal Settings icon under the General block.

## Default Currency

Specify the default currency in the given text field. This unit will be used in all the places where cost calculation is done. The default currency specified is $.

## 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.

## My Reminder(s)

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.

## Dynamic User Addition

By default, when a user is not imported into the application but imported through Active Directory, then the user can login to the application using the AD credentials. This will automatically provide login access to the application. If you do not wish to provide dynamic user addition when the user is not imported into the application then enable the '**No**' radio button.

## User Login Addition

By default, 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. If you do not wish to provide login access to users created through email requests then enable the '**No**' radio button.

## Quick Create Settings

If you wish to show the quick create section to the technicians in the home page, then enable the '**Yes**' radio button else select the '**No**' button.

## Requester Details

If you wish to allow requesters to edit their profile select '**Allow to edit their profile**' else select '**Not allowed to edit their profile**'. By default, all the workstations configured by the administrator will be listed in add new request form of the self service portal. If you want the requester to view the workstations associated to them then enable the check box '**Show workstation associated to requester in Self-Service Portal**'.

## Solutions Settings

By default, the solutions approver can approve their own solutions rather than submitting it for approval. If you wish the solution approver should not approve his own solution enable '**No**' radio button.

## 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.

# Reports

ManageEngine ServiceDesk Plus gives you a set of preset help desk, problem/change and asset reports and so on 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. Along with the default reports you also create New Custom Reports, New Query Reports, New Scheduled Report.

The following sections explain the various reports and the kind of data that each of these reports represents.

- About ServiceDesk Plus
- New Custom Report
- New Query Report
- New Scheduled Report
- Custom Settings

# About ServiceDesk Plus Reports

Reports in ServiceDesk Plus can be classified as Helpdesk, Problem/Change, Request Timespent, Survey, Asset, Audit, Resources, Purchase, Contracts reports.

## Helpdesk Reports

## Reports by all requests

These reports provide you with graphical view of all open and closed requests by category, group, created date, department, due date, level, priority, status, technician, status by category, status by level, status by priority, status by technician.

Also they can be exported as HTML file, PDF file, XLS file and CSV file.

To save the report in a particular folder click **Save report as** button. This opens the Save Report page. Specify the Report Name and if you wish the report to be viewed by all select Every One (Public) report. If you wish to view the report by just yourself (Private), select **Just me** button.

Select the Folder name from the Save-in-Folder combo box. If you wish to add new folder click Add New Folder link.

Specify the Description about the report in the given text field and Save the details.

You can also Schedule reports, View query, mail this reports for these reports. These options are available for all the report types under each report title.

### Reports by completed requests

These reports show the distribution of completed and closed requests. Similar to Report by all request, these reports are also generated based on various parameters such as category, group, department, due date, level, mode, priority and request date.

### Reports by SLA Violated 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, group, the department from which the request was generated, and the technician who handled the request and so on.

### Reports by pending requests

This shows the distribution of all pending requests for a specific period of time, based on different parameters, such as priority, department, technician, category, due date, request date and so on.

### Request Summary requests

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.

## Problem/Change Reports

### Reports by All Problems

You get a graphical view as well as tabular view of all open, closed, on-hold and resolved problems based on different parameters such as category, status, priority, impact, technician and urgency.

### Reports on Pending Problems

You get a graphical view as well as tabular view of all open and on-hold problems based on different parameters such as, category, priority, urgency and incidents counts.

### Reports on Completed Problems

You get a graphical view as well as tabular view of all closed problems based on different parameters such as, category, priority, urgency, cost and incident counts.

### Reports by All Changes

You get a graphical view as well as tabular view of all approval, approved, completed, implementation, planning, rejected, release, requested, review and testing changes based on different parameters such as, category, impact, status, change type, technician, time spent on change and priority.

### Reports on Pending Changes

You get a graphical view as well as tabular view of all pending changes such as approval, approved, implementation, planning, release, requested, review and testing changes based on different parameters such as, category, priority, change type, urgency, incident counts and problem counts.

### Reports on Completed Changes

You get a graphical view as well as tabular view of all completed changes based on different parameters such as, category, change type, priority, urgency, cost, incident counts and problem counts.

## Request Timespent 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 category, department, requester and technician attending to the request. The time spent report by requester, gives you an idea on the cost per requester and the number of request.

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.

## Survey Reports

These reports 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 take respective corrective actions.

Under Survey reports you have,

- **Survey Overview Report** which gives you 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 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.
- **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 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 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 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.

## Asset Reports

### All Computers ( Workstation and Servers )

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

- **Computers by Domain** report tells you the computers grouping based on domains. Thus you get to know the number of computers in each of the domains in your organization network.
- **Computers by Manufacturer** report gives you a high-level distribution view of the computers used from different manufacturers.
- **Computers by OS** report gives you an overview on the percentage of computers belonging to each type of operating system. Thus you will also know the different types of Operating Systems in use in your organization.

- **Computers  by Processor Manufacturer** report gives you the graphical view as well as the tabular view of the computers by processor manufacturer. Thus it gives a count of all computers with processor vendor name used in your organization.
- **Computers  by Processor Type** report will give a tabular view of all processor type in each computers used in your organization.
- **Computers  by Vendor** report gives a graphical as well as the tabular view of all vendors for each the computers in your organization.
- **Computers with less than 256MB RAM** and **more than 256MB RAM** gives the report of all computers in your organization with more than 256MB RAM and less than 256MB RAM.
- **Operating System by Region** gives you the list of workstations that are grouped under a particular region but are not yet assigned to any user or department. The list of computers is also displayed in the tabular form just below the graph.
- **Unassigned workstations by Domain** gives you the number of computers that are connected to the domains but are not assigned to any user or department or computer. The list of computers is also displayed in the tabular form just below the graph.

**Server**

- **Server with less than 10% Free Disk space** gives the report of all the servers in your organization with less than 10% free Disk space.
- **Servers with less than 512MB RAM** gives the report of all the servers in your organization with less than 512MB RAM.

**Software**

Under software reports you have, Software Reports - Purchased Vs Installed software, Software by Category and Software by Manufacturer**.** Under **software reports - purchased Vs Installed** software you can view the list of all software purchased vs installed in each of the workstation in your organization. Under **software by category** you can view the list of all software classified under default software category. Under **Software by Manufacturer** you can have the tabular view of all software used in your organization listed based on the manufacturer of the software.

**Workstation Summary Reports**

Under workstation summary reports you have, Software Summary Report and Hardware Summary Report**.**  **Software summary report** provides you with the tabular view of all the software installed in each workstation. This includes all managed, unmanaged software. **Hardware summary report** provides you with all the hardware details of an workstation such as, memory details, drive information, hard disk information, physical drive information, network adapters and so on. Thus it gives a complete overview of all the software installed and hardware details of an workstation.

## Audit Reports

Under audit reports you have audit history by workstation, audit history by time line, audit history by changes. The updated audit reports are available only by scanning the workstation. **Audit history by workstation** gives a complete report on the account of all actions taken place in a workstation. This provides detail report on both hardware and software details. **Audit history by time line** gives a detail overview of all actions taken place in a workstation for a specific time period. By default you can get only the current week report. **Audit history by changes** gives a complete report on all changes taken place in a workstation for the current week.

To get the audit report for previous weeks,

1. Click the **Edit** button. This opens the Custom Reports.
2. From the Date Filter block-> select the **Scan Date** option from the combo box -> select the duration by clicking **During** combo box which provides you with the last week, last month, this month, this quarter, last quarter or yesterday options to generate reports. **(OR)** if you wish to generate reports for a specific time period then select the **From and To** radio button and select the dates from the calender button.
3. Click **Run Report** button. You can get report for the specified time period.

## Resources Reports

Under resources reports you have, resources by product type, resources by vendor, resources types by site. **Resources by product types** gives the graphical view as well as the tabular view of all the resources (assets) available for all default and newly added product types. **Resources by Vendor** gives the graphical and tabular view of all the resources in the organization based on the vendor name. The name of the vendor will be in X-axis and the resource count will be in Y-axis. **Resource Types by Site** lists all the available resources in your organization distributed across each sites of your company.

## Contract Reports

Under contracts reports you have reports based on Active contracts, Contracts by Max value, Contracts by status, Contracts by vendor and Expired contracts. **Active Contracts** shows all the open contracts in your organization in a graphical and tabular view. Contracts by **Max Value** shows all the contracts which costs above 1000$ will be displayed in both graphical and tabular view. **Contracts by Status** shows the list of all contracts with its status level such as, open contracts, expired, expired in the last 30 days, expiring in next 7 days and expiring in next 30 days in a graphical and tabular view. **Contracts by Vendor** shows all the contracts with all status level but classified based on the vendor. **Expired Contracts** shows the list of all the expired contracts in your organization.

## Purchase Reports

Under purchases you have reports based on PO Vendors, PO by Ordered Date, PO by Required Date, PO by Status. **Purchase orders by vendors** gives the graphical view and tabular view of all the approved, pending for approval, partially approved, closed, overdue, po's due in next 7 days, po's due in next 30 days purchase orders classified based on the vendor name. **Purchase orders by ordered date** gives the graphical view and tabular view of all the approved, pending for approval, partially approved, closed, overdue, po's due in next 7 days, po's due in next 30 days purchase orders classified based on the ordered date. **Purchase orders by required date** gives the graphical view and tabular view of all the approved, pending for approval, partially approved, closed, overdue, po's due in next 7 days, po's due in next 30 days purchase orders classified based on the required date.

# 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 your **user name** and **password**.
2. Click **Reports** tab in the header pane.
3. Click **New Custom Report** button in the reports home page. This opens the Custom Report page that will help you navigate through the various steps involved in the creation of a custom report.
4. Specify the relevant **Report Title** in the given text field. This is a mandatory field.
5. Choose the **Report Type** by selecting the radio buttons. You can create **Tabular Reports, Matrix Reports, Summary Reports, Audit Reports.**
6. Choose the module (Request, TimeSpent, Problem, Change and so on) for which you wish to create the report. The audit History module will be enabled only for audit reports. This is applicable only for the tabular and matrix reports. For summary reports, audit reports default modules will be selected.
7. Click **Proceed to Report Wizard >>** button. This opens the Display Columns page. This page differs for each report type. Each report type has to go through various steps before generating it as a customized report.

## To generate Tabular Reports

Tabular reports are simple reports that allow you to list your data based on certain criteria. If you had selected the **Tabular Reports** option then you have five steps to create a complete customized tabular report. If you wish to skip a particular option then click the next tab and move to the next step.

### Display Columns

The first step to create tabular reports is to select the display columns which need to be displayed in the tabular report. Select the columns from the **Available Columns** list box and click **>>** button to move them to **Display Columns** list box. Click the **<<** button if you want to remove any column from the **Display Columns** list box.

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

### Filter Options

1. If you are using the date/time filter criteria, select the date column name from the **Select Column** combo box.
2. Select the period for which you want to generate the report. If you would like to generate report during this week, last week, this month, last month, this quarter, last quarter or today, yesterday then select the **During** radio button and select the time period from the combo box. **(OR)** If you wish to provide a custom period, then select the **From** and **To** date using the calender button.
3. To use **Advanced Filtering**, select the column name such as, Requester name, region site and so on from the combo box. Select the criteria (is, is not, contains and so on) from the combo box. You can pick a value by invoking the icon. Select **AND** or **OR** option from the combo box to add more than one criteria. You can delete a criteria by clicking the delete icon.
4. Click the **Choose** button and select the value for the column to add as a filter condition.

5. Click as **Add to Filter** button to add the filter condition to the filter set which gets listed under the **Filter Set** title.
6. Click **Next** button to go to the grouping of data.

### Grouping Data

From the **Group by** combo box, select the column based on which you wish to group the data.

Select the **Order by** from the combo box.

Click the **Next** button to go to the next stage.

### Column Summary

You can get the column summary for all the columns in the report. If you wish to have the column summary displayed in the report, select the column summary options available for each column. The summary options differs for each column you have selected.

Click the Next button to go the next option.

### Charts

In addition to the tabular chart, if you wish to have a chart displayed for a particular column then, or you can skip this option and directly run the report.

1. Select the chart type to be displayed from the combo box.
2. Select the **Axis column** from the combo box to be displayed in the chart . This is a mandatory field. The data will be grouped in the chart based on the column selected.
3. Select the **Display Format** from the combo box. For ex: in numbers or in percentage.
4. Click **Run Report** button.

On running the report you get a tabular report as well as the graphical view for the selected column data.

## To generate 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. If you have selected matrix reports you have two steps to generate a complete matrix report. Click the **Proceed to Report Wizard** button to go to next page.

### Grouping Data

You have simple grouping and advanced grouping option for matrix reports.

#### Simple Grouping

1. Click the **Simple** grouping tab. You have two options **Top column** information and **left column** information. Select the top column information from the combo box. This is a mandatory field.
2. Select the left column information from the combo box. This is a mandatory field.
3. Select the **summarize column count** from the combo box to get the column summary.

**Normal Grouping**

1. Click the **Advanced** grouping tab. You have two options **Column grouping** and **Group by**.
2. Select the **Columns** and **Date format** to be displayed from the combo box. Select the group by from the combo box. You have three options for group by to be displayed in the report. This is a mandatory field.
3. Select the **summarize column** from the combo box.
4. 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.
5. Click **Next**.
6. 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.

### Filter Options

1. If you are using the date/time filter criteria, select the date column name from the **Select Column** combo box.
2. Select the period for which you want to generate the report. If you would like to generate report during this week, last week, this month, last month, this quarter, last quarter or today, yesterday then select the **During** radio button and select the time period from the combo box. **(OR)** If you wish to provide a custom period, then select the **From** and **To** date using the calender button.
3. To use **Advanced Filtering**, you first need to select the radio button for **matching all the selected criteria** or a**ny one of them**. Then from the column listing, select the various columns from the list and set the match operator and mention the values for matching the column as (is, is not, contains and so on) from the combo box.
4. Click the **Choose** button and select the value for the column to add as a filter condition.
5. Click as **Add to Filter** button to add the filter condition to the filter set which gets listed under the **Filter Set** title.
6. Click **Run Report** button. You get a matrix report

## Request Summary Reports

Summary reports are detailed reports that allow you to list your data based on certain criteria. To create a request summary report, select the corresponding radio button from the custom reports page and click the **Proceed to Report Wizard** button to go to next page. You have two steps to generate a complete request summary reports.

### Display Columns

The first step to create request summary reports is to select the display columns which need to be displayed in the request summary report. Select the columns from the **Available Columns** list box and click **>>** button to move them to **Display Columns** list box. Click the **<<** button if you want to remove any column from the **Display Columns** list box.

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

### Filter Options

1. If you are using the date/time filter criteria, select the date column name from the **Select Column** combo box.
2. Select the period for which you want to generate the report. If you would like to generate report during this week, last week, this month, last month, this quarter, last quarter or today, yesterday then select the **During** radio button and select the time period from the combo box. **(OR)** If you wish to provide a custom period, then select the **From** and **To** date using the calender button.
3. To use **Advanced Filtering**, you first need to select the radio button for **matching all the selected criteria** or a**ny one of them**. Then from the column listing, select the various columns from the list and set the match operator and mention the values for matching the column as (is, is not, contains and so on) from the combo box.
4. Click the **Choose** button and select the value for the column to add as a filter condition.
5. Click as **Add to Filter** button to add the filter condition to the filter set which gets listed under the **Filter Set** title.
6. Click **Next** button to go to the grouping of data.

## Audit Reports

Audit reports are detailed history report that allow you to list your inventory history data based on scan time criteria. Click **Proceed to Report Wizard** button to go to the next page. This opens the **Audit History Report** page.

You have three audit history reports options, on scanning the workstation you get the updated version of all the audit reports.

- **Audit history by workstation.**

  Audit history by workstation gives a complete audit reports of the hardware and software details of the workstation.

- **Audit history by time line.**

  Audit history by time line gives a detail overview of all the actions taken place in a workstation for a specific time period.

- **Audit history by changes.**

  Audit history gives a complete report on all changes taken place in a workstation.

Select any of the three audit history report options. Specify the scan date from the combo box.

Click **Run Report** button. You get the audit history report.

# Creating New Query Reports

1. Click on the **Reports** tab. This opens the All Reports page.
2. Click **New Query Report** button. This opens the Query Editor page.
3. Select the **Table Schema** from the combo box say,  requests, timespent and so on. Click **Get** to view the table schema for the selected option.
4. Specify the title of the report in the **Report Title** field. This is a mandatory field.
5. Specify the query to be executed for getting reports in the **Query** field. This is a mandatory field.
6. The logs will display all error messages on providing any wrong query.
7. Click **Run Report** to run query report.

## Tips

1. Date Formulae: DATE_FORMAT (FROM_UNIXTIME (COLUMN_NAME/1000),'%d-%m-%Y %k: %i') 'Column Alias'.
2. Minutes Formulae: ROUND ((((COLUMN_NAME/1000)/60)) % 60) 'Minutes'.
3. Hours Formulae: ROUND (((COLUMN_NAME/1000)/3600)) 'Hours'.
4. Compare Date: COLUMN_NAME >= (UNIX_TIMESTAMP (DATE ('2006-07-24 00:00:00')) * 1000).
5. Convert Memory in GB: ((((MEMORY_COLUMN)/1024)/1024)/1024)
6. Default Value For Null Data: COALESCE (COLUMN_NAME, 'Unassigned')
7. Group by: Query statement will be ends with order by <column_index>

## Additional Field tables

1. Request Additional Fields - WorkOrder_Fields
2. Requester Additional Fields - Requester_Fields
3. Technician Additional Fields - Technician_Fields
4. Asset Additional Fields - Asset_Fields
5. Workstation Additional Fields - Workstation_Fields
6. Problem Additional Fields - Problem_Fields
7. Change Additional Fields - Change_Fields

# Scheduling Report Settings

1. Click **Reports** tab. This opens the All Reports page.
2. Click **New Scheduled Report** button. This opens Schedule Report Settings page.
3. To generate report once click **Generate Once** radio button. Specify the date using the calendar button and Time from the combo box on which the report has to be generated.
4. Select the **report to schedule** from the combo box. The list will display all the available reports such as, Reports by All requests, Reports by Completed requests, Reports by SLA Violated reports and so on. This is a mandatory field.
5. Specify the **E-mail ID** of the person to whom the generated report has to be sent.
6. Save the details. Scheduled reports gets displayed in the **Schedule Reports** page.
7. To generate reports on a daily basis click **Daily Report** radio button and specify the **From Date, Time**, **report to be scheduled** and the **e-mail address** of the person to whom the report has to be sent. Save the details.
8. To generate weekly report click **Weekly Report** radio button. Specify the days of the week on which you want to generate reports by selecting the check box. Or select **Everyday** check box to generate reports on daily basis. Also specify the time, report to schedule, and E-mail ID of the person to whom the generated report has to be sent. Save the details.
9. To generate reports on a monthly basis click **Monthly Report** radio button. Specify the month on which the report has to be generated by enabling the check box. Or select **Every Month** check box to generate reports on monthly basis. Also specify the time, report to schedule, and E-mail ID of the person to whom the generated report has to be sent. Save the details.

# Custom Settings

The custom settings wizard helps you to customize the report column size. This helps to increase or decrease the tabular column size, matrix column size and modify the date and time format of your custom reports.

1. Click **Reports** tab. This opens the All Reports page.
2. Click the **Custom Settings** button. The Report Settings page pops up.
3. If you wish to customize the **Tabular column size**, specify the size of the small text, large text, number size and date and time text. And update the changes.
4. If you wish to customize the **Matrix column size**, specify the size of the cell width and cell height and update the changes.
5. You can also change the date and time format to be displayed in the report. If you specify the format in the given text field as MM-dd-yyyy HH:mm then the result would be Date: 09-20-2007 Time:03:20.
6. To disable the links in reports enable the check box beside **Disable links in report** under General Settings block. To view **one Group per page**, enable the check box beside the same.
7. Click the **Update** button to update the changes. While generating reports the customized report format will be

# Appendix

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

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- System Log Viewer
- Feedback
- Personalize
- Backup and Restore
- Changing web server port
- Troubleshooting

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# 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.

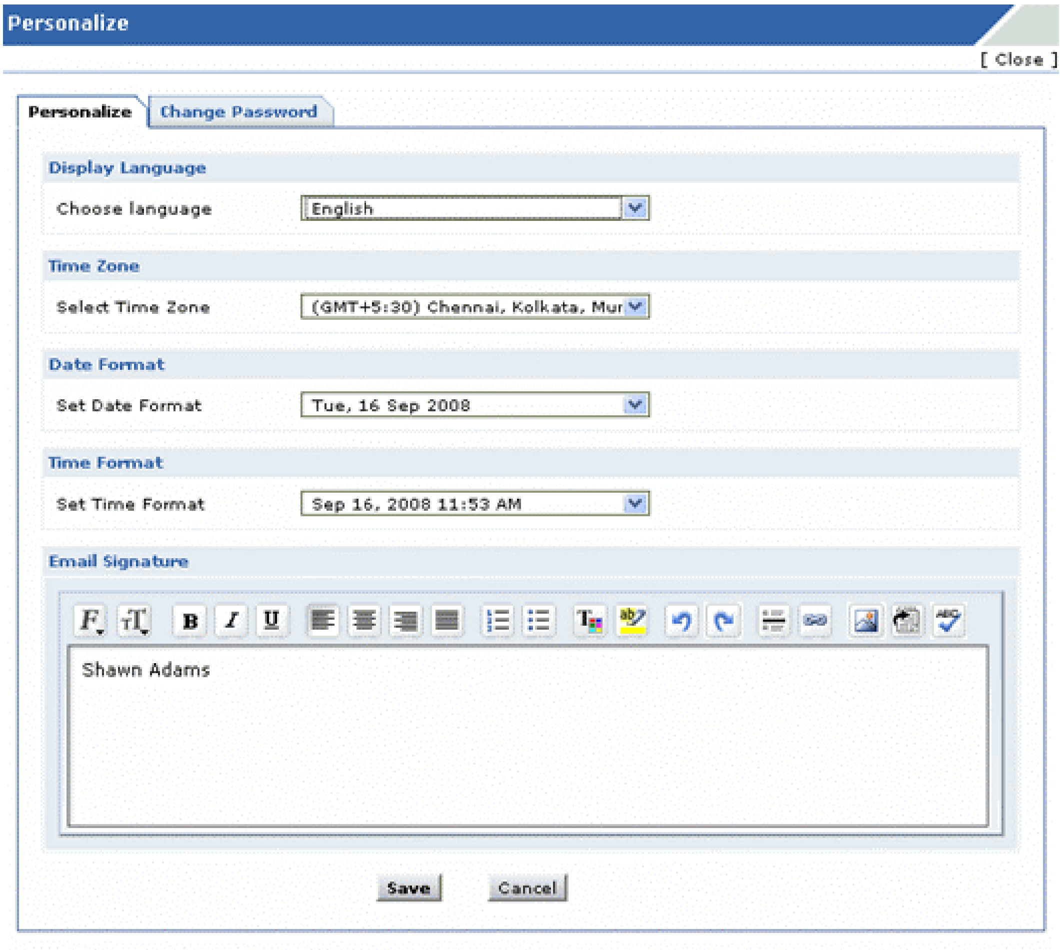
To send your feedback,

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 personalization such as display language, time zone and so on, 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 right corner of the page. This opens Personalize page which has two tabs which are, **Personalize** and **Change Password** as shown below,




## Personalize

The personalize tab consists of display language, time zone, data format, time format and e-mail signature.

- **Display Language**
  Select the language of your choice from the **Choose Language** combo box. The selected language will be you default display language in the application. All the data will be displayed in the language selected by you.

- **Time Zone**
  Since the organizations can be situated in various sites, every site has its particular time zone. Select the time zone of the site of your organization from the **Select Time Zone** combo box. The date and time will be set according to the selected time zone.
- **Date/Time Format**
  Select the format of the date such as, Tue 16 Sep 2008, from the **Set Date Format** combo box. Similarly you can also set the time format from **Set Time Format** combo box. The selected date and time format will be displayed where ever date/time is considered
  **For example**: While creating a request, the request created on and due by time will be displayed in the selected date and time format corresponding to the selected time zone. The same can be viewed under Problem, Change, Solution and Purchase modules.
- **E-mail Signature**
  You can have your own personalized signature while replying to the mails using this option. Enter your signature in the text provided. Click **Save**.

## 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.

# 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.



| | |
|---|---|
| **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:<br><br>1. The login name and password provided for scanning might be invalid in the workstation.<br>2. Remote DCOM option might be disabled in the remote workstation. |
| **Resolution** | 1. Check if the login name and password are entered correctly.<br>2. Check if Remote DCOM is enabled in the remote workstation. If not enabled, then enable the same.<br><br>To enable DCOM in Windows 2000 Computers:<br>1. Select Start > Run<br>2. Type DCOMCNFG in the text field<br>3. Click OK.<br>4. Select Default Properties tab<br>5. Check the box "Enable Distributed COM in this machine"<br>6. Press OK<br><br>To enable DCOM in Windows XP Computers:<br><br>7. Select Start > Run<br>8. Type DCOMCNFG in the text field<br>9. Click OK<br>10. Right Click on Component Services > Computers > My Computer<br>11. Click Properties<br>12. Select Default Properties tab in the frame that pops<br>13. Check the box "Enable Distributed COM in this machine"<br>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).<br><br>net use \\<RemoteComputerName>\C$ /u:<DomainName\UserName> "<password>"<br>net use \\<RemoteComputerName>\ADMIN$ /u:<DomainName\UserName> "<password>"<br><br>Replace the relevant value within <>. Supply password within the quotes.<br><br>If these commands show any error message, then the provided user account is not valid in that remote computer. |

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|---|---|
| **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.<br><br>To know how to enable DCOM in Windows system refer to resolution of the error message Either access denied for the user or the remote DCOM option might be disabled in the workstation. |

| | |
|---|---|
| **Error Message** | Connection to RPC server in the workstation failed |
| **Cause** | This message is shown when a firewall is configured on the remote computer. Such exceptions mostly occur in Windows XP (SP-2), when the default Windows Firewall is enabled. |

| | |
|---|---|
| **Resolution** | Disable the default Firewall in the workstation. To disable the Firewall in Windows XP (SP2)<br><br>1. Select Start->Run<br>2. Type Firewall.cpl<br>3. Click OK.<br>4. In the General tab, click Off.<br>5. Click OK.<br><br>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:<br><br>netsh friewall set service RemoteAdmin<br><br>After scanning the computer, if required, the Remote Administration feature can also be disabled. The following command disables the feature:<br><br>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:<br><br>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<br><br>1. Click Start -> Run.<br>2. Type Services.msc<br>3. Click OK.<br>4. In the Services window that pops-up, select "Windows Management Instrumentation" service and right-click on that.<br>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.<br><br>1. Click Start -> Run.<br>2. Type Services.msc<br>3. Click OK.<br>4. In the Services window that pops-up, select "Windows Management Instrumentation" service and right-click on that.<br>5. Click Properties.<br>6. If the Startup type is "Disabled", change it to "Automatic/Manual" and start the service.<br>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:<br><br>1. Use Regedit to navigate to: HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\OLE.<br>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.<br>3. Click OK<br>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. |