ManageEngine SupportCenter Plus

Admin Guide

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Introduction

ManageEngine SupportCenter Plus is a comprehensive help desk management software that provides help desk agents an integrated console to monitor and maintain requests generated from the users of various products obtained from an organization and resolve them at the earliest. The customer support desk plays an important part in the services industry. It is very often the first contact the users have in their use of products when something does not work as expected. The customer support desk is a single point of contact for end-users who need help. Without this, an organization could certainly face losses due to inefficiencies in after sales services.

The two main focuses of the ManageEngine SupportCenter Plus are Request tracking and Customer Account Management. Using the following modules of SupportCenter, support reps 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 changing needs of the consumers and hence modify their services to suit the customer requirements and thus delight them.

- Requests
- Solutions
- Accounts
- Contacts

The request module functions as the customer support desk where requests are fetched and necessary solutions are provided by assigning support reps to resolve issues reported.

When you log in to ManageEngine SupportCenter Plus, the application displays the SupportCenter Plus home page that contains information on pending requests, overdue requests, requests assigned to the user who has logged in, individual user's task list, and depending on the user login, the other dash board views.

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

Solutions: This module serves as a knowledge base for your customer support team as well as your customers. Customers can search this for solutions for issues and solve it themselves. Also, when support reps resolve issues, they can directly convert these resolutions as knowledge base articles. To view the solutions, click the **Solutions** tab in the header pane.

Accounts: The main objective of the customer support team would be to keep track of the various customer related information and keep it up-to-date. SupportCenter Plus allows you to add your customer accounts and their contact information, update and track them periodically. The account information gives you details on the customer's organization and purchase details. This will give you details about the purchases that the company has made and the kind of support that needs to be provided to them. To view the Account details, click the **Accounts** tab in the header pane.

Contacts: The contact information tracking enables you to have a tab on what is the latest progress on the status of the customer, the type of customer and other such related information. To view the various contacts and their details, click the **Contacts** tab in the header pane.

In addition to these, SupportCenter Plus has GUI-rich reports for requests and user survey. There are predefined sets of reports that help you evaluate the efficiency and productivity of your customer support team, the load of requests handled by the team, the customer database and their history and much more. Also, the SupportCenter administrator can configure various helpdesk, customer, and enterprise-related settings, such as the working hours of the organization, service-level agreements, user roles, customer details, accounts, contacts, and many more.

Based on the permissions provided by the SupportCenter 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 SupportCenter Plus administrator.

System Requirements

Hardware

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

Operating System

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

Installation and Getting Started

- In Windows
- In Linux

In Windows

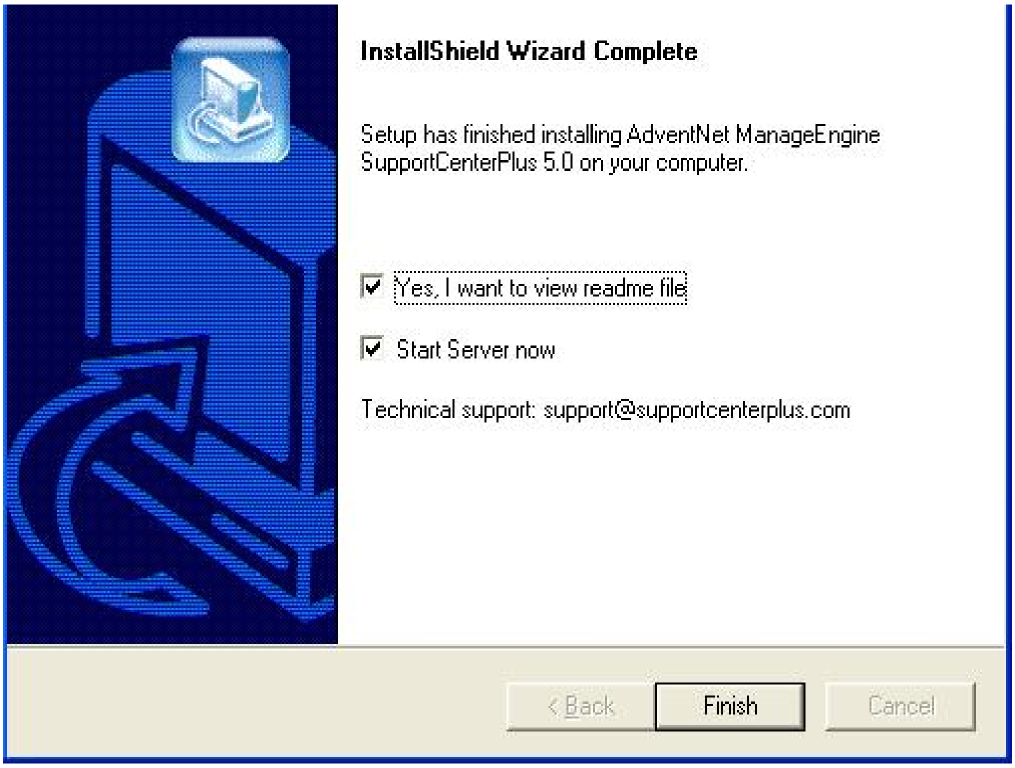
Follow the steps given below to install and set up the ManageEngine SupportCenter Plus application:

1. Download the **AdventNet_ManageEngine_SupportCenter_Plus_5_Windows.exe** file.
2. Click the exe file to start the installation. The SupportCenter Plus installation wizard appears. Follow the instructions given in the wizard to successfully set up SupportCenter Plus.
3. On accepting the license agreement, the installation wizard provides you with an option to choose between Trial Edition and Free Edition of the SupportCenter Plus application. Free Edition never expires but is restricted to a single support rep login. The Trial Edition is valid only for 30 days and provides two support rep login. There are no other restrictions. Choose the appropriate edition for your need and click **Next**.
4. The next step is choosing the installation directory. By default, the application is installed in *C:\AdventNet\ME\SupportCenter* directory. If you want to change the installation directory, then, click the **Browse** button beside the directory path.

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

5. From the file chooser window, choose the directory of your choice and click **Next.**
6. 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 SupportCenter Plus application server.
7. Click **Next**.
8. To install SupportCenter as a Windows service, choose the check box **Install SupportCenter as service**. By default, this is selected. You need to deselect it if you do not want it to start as a service.
9. Click **Next**.
10. Provide a name that needs to appear in the Programs folder. By default, it is **AdventNet ManageEngine SupportCenter**.
11. Click **Next**. The application is installed.
12. On successful installation, 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**.

13. Click **Next**. The following screen is displayed.



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

14. 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 SupportCenter Plus** program group is created in the **Start** menu. Also, the SupportCenter 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 SupportCenter Plus application

1. Click **Start -> Programs -> AdventNet ManageEngine SupportCenter -> SupportCenter 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 -> AdventNet ManageEngine SupportCenter -> SupportCenter 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 SupportCenter 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 SupportCenter Plus application

1. Click **Start -> Programs -> AdventNet ManageEngine SupportCenter -> Shutdown SupportCenter**. 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 SupportCenter Plus.

To reinitialize the server

1. Go to *<SupportCenter>\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 SupportCenter Plus application:

1. Download the **AdventNet_ManageEngine_SupportCenter_Plus_5_Linux.bin** file.
2. Execute the .bin as given below, at your command prompt:
   ./AdventNet_ManageEngine_SupportCenter_Plus_5_Linux.bin

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

3. The installation wizard is opened and the you will be guided through the installation process.
4. Click **Next** and follow the steps given in the installation wizard.
5. The second screen displays the License Agreement. You need to accept the license agreement to proceed with the installation. So, select the radio button accepting the license agreement.
6. Click **Next**.
7. On accepting the license agreement, the installation wizard provides you with an option to choose between Trial Edition and Free Edition of the SupportCenter Plus application. Free Edition never expires but is restricted to a single support rep login. The Trial Edition is valid only for 30 days and provides two support rep login. There are no other restrictions. Choose the appropriate edition for your need and click **Next**.
8. The next step is choosing the installation directory. By default, the application is installed in *home/<user>/AdventNet/ME/SupportCenter* directory. If you want to change the installation directory, then, click the **Browse** button beside the directory path.
9. From the file chooser window, choose the directory of your choice and click **Next**.
10. 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 SupportCenter Plus application server and click **Next**.

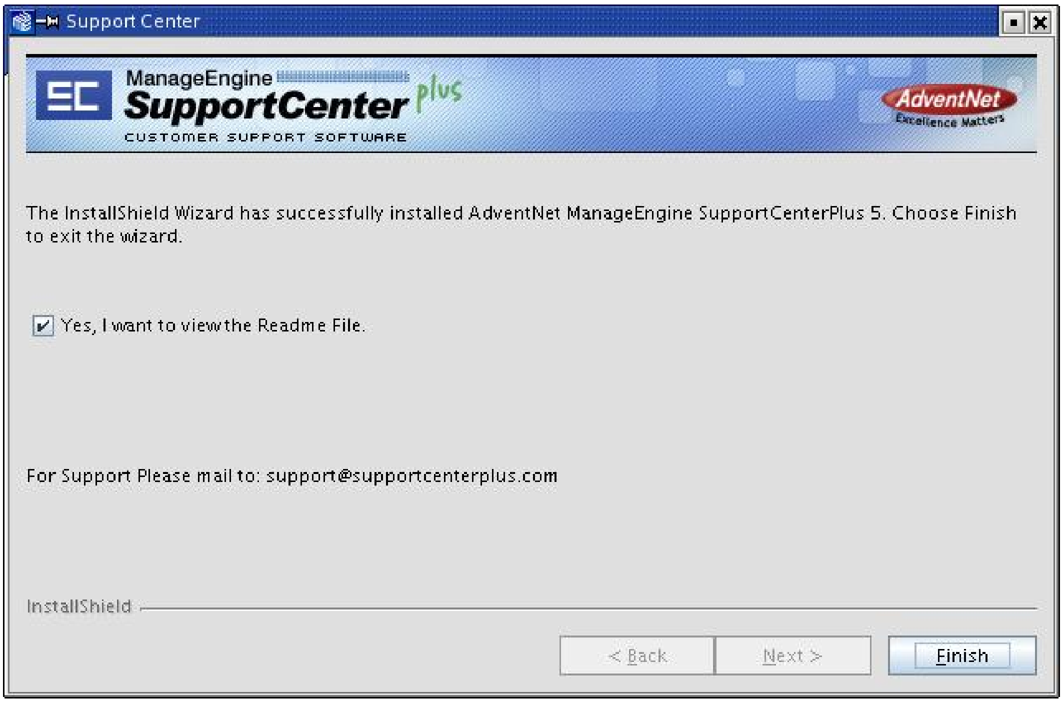
Warning: If you wish to provide a port number lesser than 1024 as the web server port, then you need to be the super-user of the system to successfully install and run SupportCenter Plus application.

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/SupportCenter
    Product Size : 72.6 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 SupportCenter Plus application

1. Go to the <*SupportCenter 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 SupportCenter 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 SupportCenter 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 SupportCenter Plus application, execute **shutdown.sh** file from the **bin** directory as below:

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

To reinitialize the server

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

Uninstalling SupportCenter Plus

- In Windows
- In Linux

In Windows

To uninstall SupportCenter Plus from Windows

1. Click **Start -> Programs -> AdventNet ManageEngine SupportCenter Plus -> Uninstall SupportCenter**.

In Linux

To uninstall SupportCenter Plus from Linux

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

```
$ ./uninstaller.bin
```

Registering SupportCenter Plus

Once your trial evaluation period is over, you need to register the SupportCenter 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 SupportCenter Plus application.

To register SupportCenter Plus

1. Log in to the SupportCenter 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 **Apply**.

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

Contacting AdventNet

- AdventNet Headquarters
- Sales
- Technical Support

AdventNet Headquarters

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

Sales

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

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

Technical Support

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

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

Alternatively, you can submit your feedback from the SupportCenter 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 SupportCenter 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.

Request

ManageEngine SupportCenter Plus request module helps you better manage the services provided by your customer support 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 customer support team. Apart from this, SupportCenter 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 SupportCenter 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 your customer from the customer support 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 support rep 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 contacts, a **Self Service Portal** has been provided. This can be used by the individual contacts to track the status of their requests and to look up solutions from the online knowledge base. To access this self-service portal, the contacts need to log in to the SupportCenter Plus application using their respective user name and password. For more details on self-service portal, refer to **Self Service Portal** topic.

Creating a New Request

When system users need a service from the system administration team relating to the assets or any other service such as software installation and so on, they can send a request to the team. There are different modes of placing a request to the system administration team, such as web-based form, e-mail notification, and phone call. SupportCenter 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 SupportCenter Plus application using your **user name** and **password**.
2. Click the **New Request** link available just below the tabs in the header pane or click the **New Request** button in the Request index page.

Quick Create

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

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

Providing Request Details

In the new request form, the first block - **Request details** has information regarding the request, such as status of the request, mode of request submission, and request level. All these are drop-down boxes containing predefined values that can be added from the Admin module.

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

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

Based on the request content, the **Level** of the request also can be assigned. If unsure the default entry can be left as is.

Assigning Request to Queue / Support Rep

You need to provide the owner for the request. You can either assign to request to a specific queue or a support rep. Under the **Owner Details** block, from the **Assign to** list box, select **Queue** to assign the request to a queue or **Support Rep** if you want to directly assign it to a support rep. The owner list box will now display values depending on the choice you made.

For example, if you have chosen Queue, then the owner list box will be renamed to Queue and will list the queues that are available, from which you can choose the queue of your choice. Only a help desk team member will be able to assign a queue or support rep to the request. Others can create a request, but cannot assign a support rep or queue to the request.

Additional Request Details

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

Selecting the Contact

You can select the contact from the list of users using the SupportCenter Plus application.

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

2. From the above list of contacts, click the hyper-linked contact **Name** to choose the contact.

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

Classifying Request Category

Under the **Task Details** Block, there is a **Category** drop-down box. This lists the various categories under which a request can be classified. You can select the relevant category under which your request can be classified. Alternatively, if the list of categories are too lengthy, then you can click the choose category icon available beside the category list box. For more details on category, refer to Configuring Request Category under the Helpdesk Configurations section.

Prioritizing Request

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

Describe Request

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

Add Attachments to the Request

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

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

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

Modes of Creating a Request

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

1. **E-mail** the request to the help desk team. This e-mail will be automatically converted to a new request in the SupportCenter Plus application.
2. Call 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 SupportCenter 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.

Viewing a Request

To view a request available in the SupportCenter Plus Request module

1. Log in to the SupportCenter 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 SupportCenter Plus application in the **Open** status. Unassigned and assigned requests that have not yet been viewed by the corresponding support rep even once will be in bold text, while the viewed requests will be in regular font.
3. Click on the **Title** of the request that you want to view. This opens the **View Request** page that contains tabs: **Request**, **Resolution**, and **History**.

In the **Request** tab, the data is grouped in a logical manner. The request header contains the request ID, category, level, status, and priority. If the request is still a part of a queue and is yet to be assigned to a support rep, then the queue details will also be displayed in the header. The request summary, description, name of the contact who raised the request, attachments, and the due date of the request are displayed in the next block. To view the attachments to the request, click the file.

Next is the **Conversations** block, which displays the mail transactions / threads that have been exchanged between the support rep and the contact, related to the request. The 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 contact and the support rep.

In the **Request Details** block, details such as mode of the request, support rep attending to the request, created date, and due date are displayed. Once the request has been responded and closed, this block will also have the responded time, closed time, and Total Time spent details.

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 contact/workstation/ department, the **Due By Date** is calculated. If you have responded to the contact 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.

Viewing Request by Contact

In the **Contact Details** block, details of the contact such as name, workstation which has the issue, e-mail ID, contact number, and location are displayed. Also, there is a button **View Requests by <Contact Name>**. Click this button to view all the requests raised by this contact, which will be listed in a separate pop-up window. To view the individual request details, click the title to open the request in the pop-up window itself.

You can also view the account details of the contact by clicking the hyperlinked **Account Name** available in the **Contact Details** block. To view the individual contact's detials, click the hyperlinked contact name or the **View Contact Details** link under the **Tasks** block.

The **discussion notes** are listed in the descending order of their date of creation just below the Contact Details block.

Cost of a Request

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

1. Click **Add Time Entry** button. The Add Time Entry dialog pops up.
2. Select the support rep name from the **Support Rep Resolving This Request** list box. If you have already entered the per hour cost of the support rep while creating the support rep 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. Enter the time taken to resolve the request in terms of hours and minutes.
4. The **Support Rep Cost per hour** will be fetched from the support rep details, which is a non-editable field. Using the above two data, the Support Rep Charge is calculated as Time Taken To Resolve X Support Rep's Cost per hour.
5. If you wish you can enter a description for this time spent entry.
6. Click **Save**.

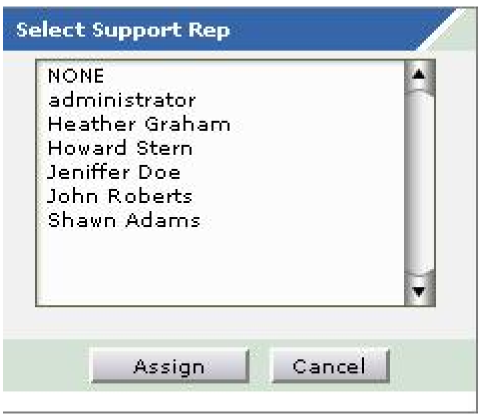
If any notes are added to the request, they will be available below the description of the request. The notes are displayed in the descending order, with the latest added note displayed first and the rest below that. The notes can usually be added to convey any technical information related to the request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

Changing Support Rep

In the view request page, you can change the support rep handling the request.

1. Click the **Change** link beside the support rep name.
2. The **Assign Support Rep** window opens with the list of support reps available. Select the support rep you want to reassign the request. You can also select **NONE**. This will unassign the request.



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

The unassigned request will be displayed in bold font.

Viewing Resolution

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

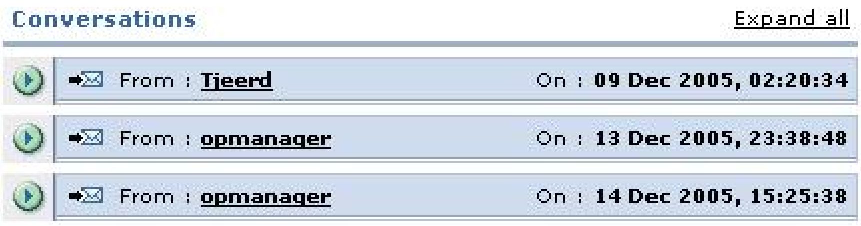
1. Click the **Resolution** tab.
2. If there are no resolutions for the request, then a message ***No Resolution Available*** is displayed. To search for resolutions from the solutions database, click the ***Look up for resolution from solutions database*** link.
3. The resolution is a documented information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

Viewing History

To view the request history from the time of its creation, click the **History** tab in the view request page. The details that are displayed in the history are in the ascending order with the earliest performed action shown at the top of the page and the latest action at the bottom of the page. From here you can check the notification history, that captures all the mails/SMS that have been sent for that request apart from the conversation history that is tracked in the Request Tab. To view this you need to click the **Notification History** link.

Request Conversations

SupportCenter Plus displays the mail transactions happening between the support rep handling a request and the contact, as conversations. The conversations are listed one below the other in the ascending order of the time when the notification (response) was sent (received). You can choose to Expand all or Collapse all conversations.



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

Split As New Request

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

To split the conversation as a new request

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

This splits the conversation into a new request.

Delete Conversation

You can delete a specific conversation. To delete a conversation

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

Editing a Request

To edit a request available in the SupportCenter Plus Request module

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

Alternatively, in the Requests list view itself, click the edit icon in the row of the request that you edit.

Modifying the Request Details

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

Moving the request on hold helps in the calculating the exact time taken to solve the request excluding the idle time when the request remained open, which is very essential in calculating the cost per support rep time.

Modifying Owner Details

You can modify the owner details of the request. If the request is assigned to the queue, then you can assign it to a support rep or change the queue to which it has been assigned to. You can also edit the **Created Date** and **Due by Date** of the request. If the request has been closed, then the **completed date** will be displayed beside this due by date, which is not editable. If the request has been responded, then the **Responded Date** is displayed beside the Created Date. This field is also not editable.

Modifying the Request Category and Priority

In the Task Details block of the edit request form, you can change the category and priority of the request if the same was not appropriately chosen at the time of submitting the request. To change the category, you can either choose from the drop down list or click the category icon beside the category field.

Modifying the Request Description

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

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

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

Appending Attachments

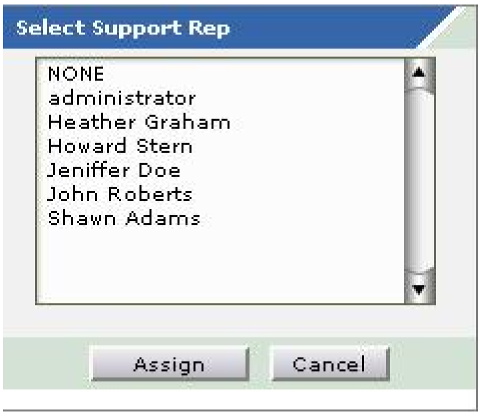
If you wish to attach more files to the request, you can do it. Click the **Attach a File** button and attach as many files as you wish and click **Done**. You can also delete the attachments that were already available in the request by clicking the delete icon available beside the attachment.

Assigning a Support Rep for the Request

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

To assign a support rep

1. Log in to the SupportCenter 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 support rep.
4. The **View Request** page lists the **Tasks** that can be performed on the requests. Here click the **Assign Support Rep** link. Alternatively, you can also click the **Change** hyperlink available beside the **Not Assigned** text in **Support Rep** field of the Request. This opens **Select Support Rep** pop-up window, with a text box listing all the support reps in the IT help desk team as shown below.



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

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

To bulk assign requests to support reps

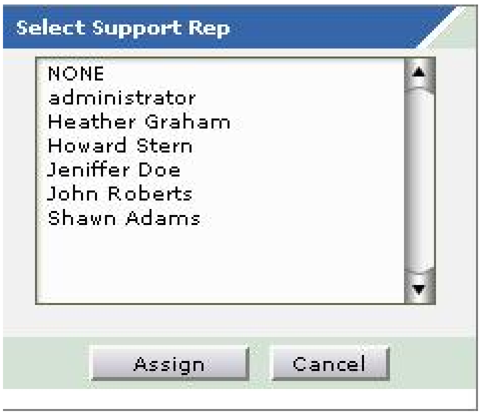
1. In the **Requests** list page, select the check box available in the row of the requests that you wish to assign a support rep.
2. Now, from the **Assign to** drop-down list of support reps, select the support rep to whom you want to assign the requests.
3. Click **Assign**.

Unassigning a Support Rep from a Request

Each request will be owned by a support rep, 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 support rep

1. Log in to the SupportCenter 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 support rep.
4. The **View Request** page lists the **Tasks** that can be performed on the requests. Here click the **Assign Support Rep** link. Alternatively, you can also click the **Change** hyperlink available beside the support rep name in **Support Rep** field of the request. This opens **Select Support Rep** pop-up window, with a text box listing all the support reps in the IT help desk team as shown below.



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

Picking up Requests

ManageEngine SupportCenter 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 support reps 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 SupportCenter Plus application using your **user name** and **password**.
2. Click the **Requests** tab in the header pane. The unassigned requests will be in bold font.
3. Select the check boxes against the row of the request which you wish to pick up for yourself and click the **Pick up** button. The selected request are assigned to you.

Viewing Contact Details

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

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

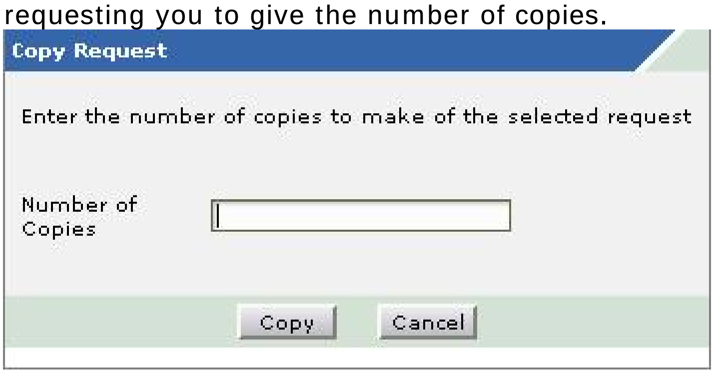
5. Once you have finished viewing the details, click the **Close** link available at the top right corner of the pop-up.

Copying a Request

When a single request has multiple issues in it that requires more than a single support rep 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 support rep to take ownership and complete the task independently.

To make multiple copies of the request

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



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

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

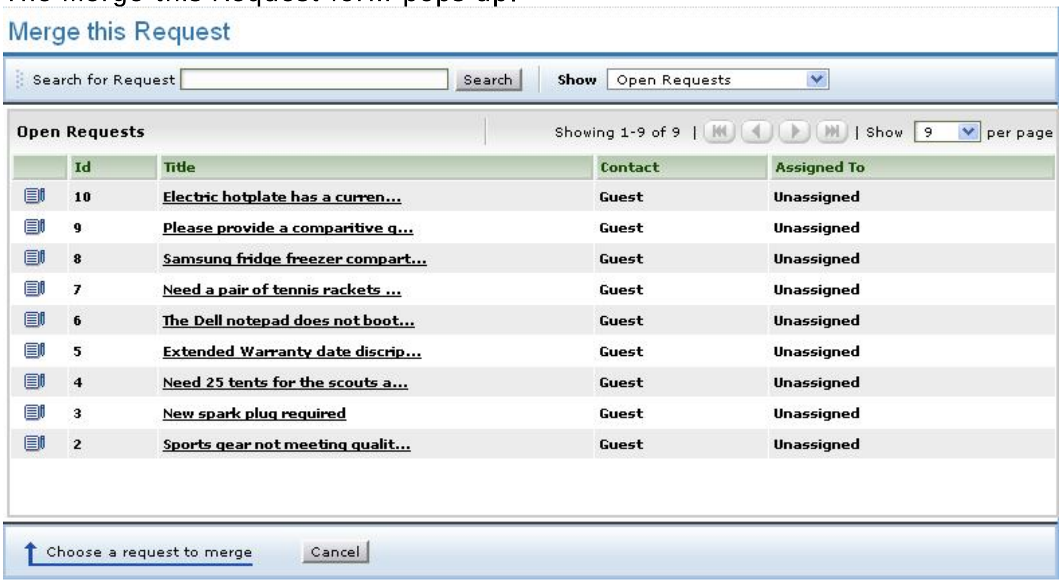
While copying the request, the **Notes** added to the original request (if any) will not be present in the duplicated requests. Also, the **Created Date** and **Due by Date** will be different from that of the original request.

Merging a Request

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

To merge one or more requests

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



4. You can search for specific request by providing a search string in the field provided above.
5. To confirm if the request that you want to merge is the correct one, you can view the request by clicking the view icon in the row of the request.
6. Click the request **Title** to merge the two requests. A confirmation dialog opens.
7. Click **OK** to merge request. Else 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.

Printing the Request

To print a request

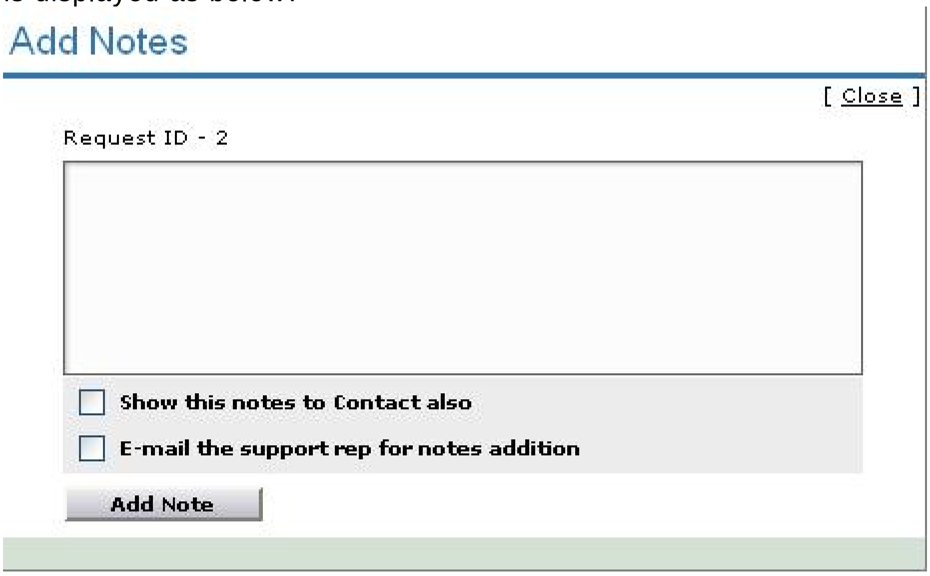
1. Log in to the SupportCenter Plus application using your user name and password.
2. Click the **Request** tab in the header pane.
3. Click the **Title** of the request that you want to print.
4. Click the **Print Preview** link on the right side **Tasks** block.
5. The print preview of the request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



5. Enter your content in the text box below the **Request ID**.
6. If you want the note to be visible to the contact who posted the request, then select the check box **Show this notes to Contact also**.
7. If you want to notify the support rep about the addition of the note, then select the check box, **E-mail the support rep for notes addition**.
8. Click the **Add Note** button. The note is added at the bottom of the request along with a date and time stamp. The name of the person who added the note is also displayed.

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

Adding Follow-Up Task

When you would like to add follow up on a specific request, you can use **Add Follow-up Tasks**.

To add a follow-up task for a request

1. Log in to the SupportCenter 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 follow-up task.
4. Click the **Add follow-up task** link under the **Tasks** block. The **Tasks** pop-up window is displayed as below:

5. To change the **date**, click the calender icon beside the date field and choose the date of your choice.
6. 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 30 min time interval.
7. Enter the **Task Summary** if you need more information other than what is already displayed.
8. Click **Add**. The new follow-up task is added and is listed along with the already existing tasks in the ascending order based on date and time.

You can add any number of follow-up tasks for a request. The added task will be displayed in the **My Tasks** in your login home. You can edit the task as per your need. Refer to the section Tracking My Tasks for more information on this.

Start / Stop Request Timer

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

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

Stop Timer

To stop the request timer

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

The reason gets appended to the request history.

Start Timer

To restart the request timer

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

The reason gets appended to the request history.

Note: You can stop and start timer for requests that are not overdue and have a Due By Time.

Closing Requests

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

To close a request

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

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

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

To close more than one request at a time

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

To view the closed requests

1. From the Request list page, select **Completed 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 Completed Requests**.

Adding a Resolution

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

To add a new resolution

1. Log in to SupportCenter Plus using your user name and password.
2. Click the **Requests** tab in the header pane.
3. Click the request **Title** for which you want to add the resolution.
4. First check if a resolution already exists for the request or not by clicking the **Resolution** tab in the **View Request** page.
5. If the ***No Resolution Available*** message is displayed, then click **Enter Resolution** link available in the **Tasks** block on the right side.
6. The page is refreshed with a text box, where you enter the resolution for the request.
7. If you want to add the resolution to the solutions also, then click **Save and Add to Solutions**, or else click **Save**.

If you click **Save and Add to Solutions**, then the next page displays a message saying that the resolution is added and displays a **New Solution** form.

1. The title of the solution is automatically filled with the title of the request. The **Contents** is filled with the resolution. You can edit both of them.
2. From the **Topic** drop-down list that contains all the available topics, choose a relevant parent topic for the solution.
3. Enter relevant keywords for the solution in the **Keywords** text box. Separate each keyword by a comma.
4. If needed you can also attach files to the solution.
5. Click **Add**. This adds the resolution to the list of solutions also.

If you have clicked **Save** while adding the resolutions and want to add it to solution now, click the **Add to Solutions** link and follow the above steps.

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 support reps to know the kind of solution provided to the reported issue. This serves as a documented proof of the way a reported issues were 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

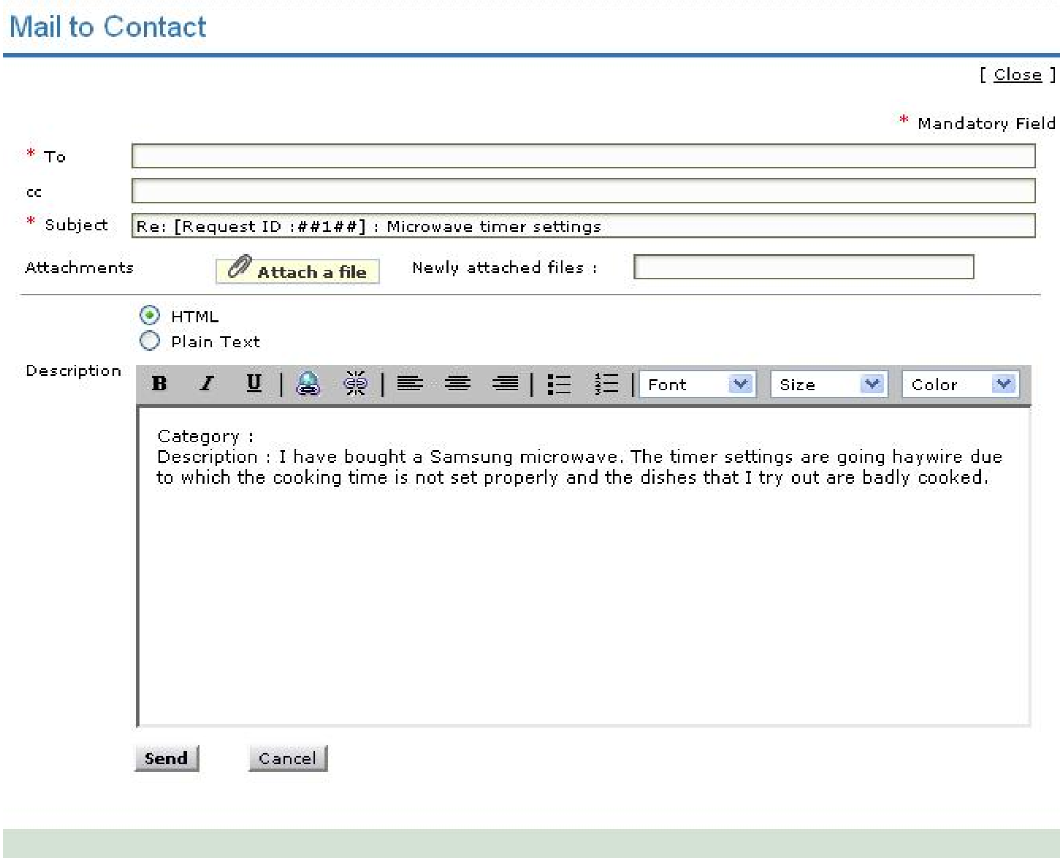
1. Log in to SupportCenter Plus using your user name and password.
2. Click the **Requests** tab in the header pane.
3. Click the request **Title** for which you need to look up the solution.
4. In the **View Request** page, click the **Resolution** tab.
5. Click the link **Look up for resolution from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

Replying the Contact

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

To respond to the contact

1. Log in to the SupportCenter 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 Contact** link on the right-side **Tasks** block, under **Notify**. This opens the **Mail to the Contact** 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 contact. 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 contact can be viewed as **conversations** in the request details view.

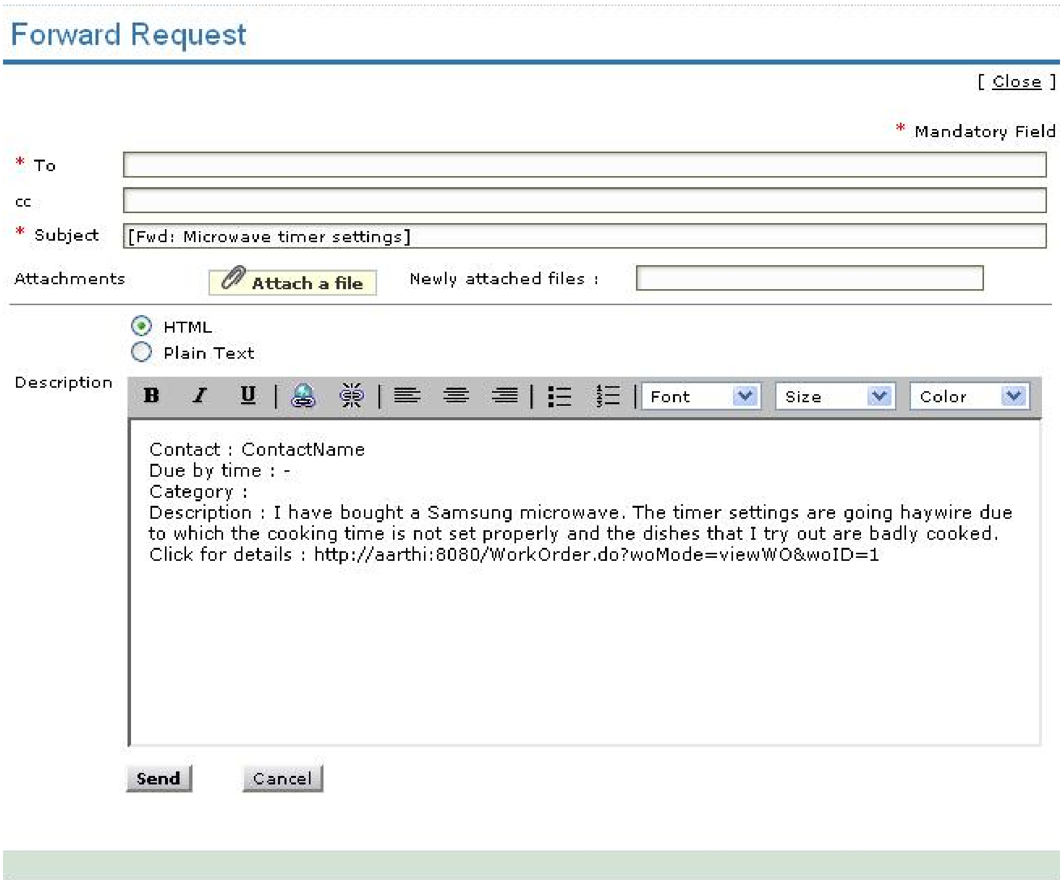
By default, the email editor will be in HTML format. If you do not want the mail in HTML format, then select the radio button **Plain Text**. A confirmation dialog will open. Click **OK** to continue changing the editor to plain text.

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

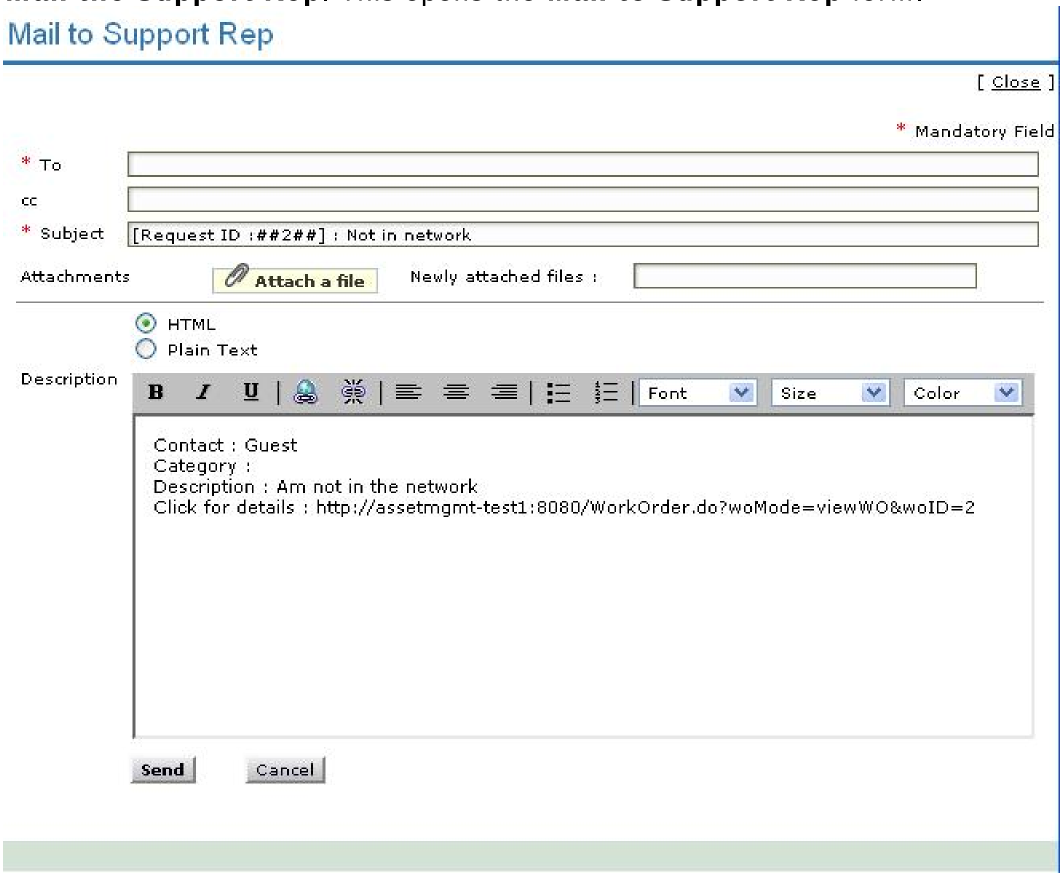


5. Enter the e-mail ID of the person to whom you wish to forward the request in the **To** field. You can also mark a copy of the forward to others. To do this, enter their e-mail IDs in the CC field.
6. Edit the **Subject** and **Description** of the e-mail.
7. Click **Attach a File** button to add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

E-mail the Support Rep

To e-mail a support rep

1. Log in to the SupportCenter 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 Support Rep**. This opens the **Mail to Support Rep** 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 support rep. To send the information to more people, enter their e-mail IDs in the **To** field or **CC** separated by comma.

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

SMS the Support Rep

ManageEngine SupportCenter Plus enables you to notify a support rep through SMS also.

To send an SMS to a support rep

1. Log in to SupportCenter 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 support rep whom you wish to notify through an SMS.
4. In the **View Request** page, on the right side under **Notify**, click **SMS the Support Rep**. The **Mail to Support Rep** 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 sent can be viewed in the Notification History. To view this

1. Click the **History** tab in the request details page.
2. Click the link **Notification History** at the top right corner of the center pane. This will open the notification history just below the request details.
3. To get back to contact conversations, click the link **Contact Conversations**.

Viewing Requests Based on Filters

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

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

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

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

1. Unassigned Requests
2. My Open Requests
3. My Requests On Hold
4. My Overdue Requests
5. My Pending Requests
6. My Requests Due Today
7. My Completed Requests
8. Open Requests
9. Overdue Requests
10. Requests Due Today
11. Pending Requests
12. Completed Requests
13. All Requests

In addition to this if you have any requests placed in queues, then you will also have option to filter the requests based on a specific queue alone. You can also perform a column sort of the requests.

Unassigned Requests

To view the requests that have not been assigned to any support rep

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

These requests will be in bold font.

My Open Requests

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

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

My Requests On Hold

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

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

My Completed Requests

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

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

My Overdue Requests

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

To view all the overdue requests assigned to you

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

Alternatively,

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

My Pending Requests

To view the requests assigned to you that are pending

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

Alternatively,

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

My Requests Due Today

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

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

Alternatively,

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

Open Requests

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

Completed Requests

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

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

Overdue Requests

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

To view all the overdue requests

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

Pending Requests

To view the requests that are pending

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

Requests Due Today

To view the requests that are due for the current day

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

All Requests

To view all the requests irrespective of their status

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

Sorting Requests by Column

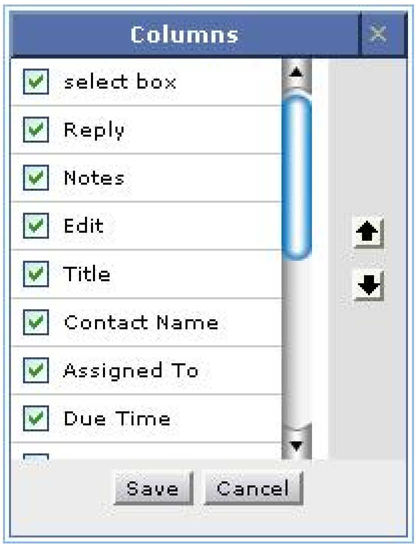
To sort request by column, click the column header. Clicking it once will sort it in ascending order. Clicking twice will sort the column in descending order.

Customizing Request List View

ManageEngine SupportCenter 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 SupportCenter 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.

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 SupportCenter 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 SupportCenter Plus application using your user name and password.
2. Click the **Request** tab in the header pane.
3. Click the **Title** of the request that you want to delete in the requests list view page.
4. In the **View Request** page, on the right-side **Tasks** block, under the **Actions**, click the **Delete this Request** link. A confirmation dialog pops up.
5. Click **OK** to proceed deleting. Click **Cancel** to abort deletion.

To delete more than one request at a time

1. In the requests list view page, select the check boxes in the row of the request that you wish to delete.
2. Click the **Delete** button. A confirmation dialog pops up.
3. Click **OK** to proceed deleting. Click **Cancel** to abort deletion.

Searching Requests

ManageEngine SupportCenter 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 SupportCenter 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.

Solutions

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

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

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

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

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

Adding a New Solution

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

To add new solutions

1. Log in to the SupportCenter Plus application using your user name and password.
2. Click the **New Solution** link available below the tabs in the header pane or the **New Solution** button in the Solutions home page that is displayed on clicking the **Solutions** tab in the header pane. This opens the **New Solution** form. The title, contents, and topic fields are mandatory fields.
3. Enter a title for the solution that you are adding. This can be a summary of the complete solution in one line that will exactly tell what the solution is all about.
4. Now enter the complete solution in the **Contents** text field. If this solution requires any additional files to support the article, then you can attach the same.
5. Click **Attach a File** button. The **Add / Remove Attachment** window pops up.
6. Click **Browse**.
7. Select the file(s) that you wish to attach to the article and click **Open**.
8. Click **Attach**. The files can be added one-by-one only.
9. Once you finish adding all the files, click **Done**. The files attached will be listed in the **Newly attached files** field.
10. 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.
11. 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.
12. To publish the solution in the self-service portal also, select the check box **Publish this solution in Self-Service Portal also**.
13. Click **Add**. If you do not wish to add the solution then click **Cancel**.

Editing a Solution

To edit a specific solution

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

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

Deleting a Solution

To delete a specific solution

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

Search in Solutions

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

To search for solutions

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

If you were in the solutions page, then the **Search in** combo box will have **Solutions** selected by default. It is just enough if you type in your search string and click **Go**. Alternatively, you can also enter the key word in the search field available in the solutions home that you arrive at on clicking the **Solutions** tab.

Browsing Solutions by Topic

To browse solutions under individual topics

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

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

Managing Topics

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

To manage topics

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

Adding a New Topic

To add a new topic

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

Renaming a Topic

To rename a topic

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

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

Moving a Topic

To move a topic to a different parent

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

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

Deleting a Topic

To delete a topic

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

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

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

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

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

Accounts

The main objective of the customer support team would be to keep track of the various customer related information and keep it up-to-date. SupportCenter Plus allows you to add your customer accounts and their contact information, update and track them periodically. The account information gives you details on the customer's organization and purchase details. This will give you details about the purchases that the company has made and the kind of support that needs to be provided for them. You can add, edit, or remove the accounts in the SupportCenter Plus application and associate the level of support to be provided to the specific organization. The type of support helps your customer support team to prioritize the requests received from various customers and respond to them based on the priority associated to the requests.

You can add, edit, and delete accounts. Once you add an account, you can add, edit, and delete contact to this account. You can also associate products to this account to keep track on the products that are purchased by the customer. To know more on how to add, edit, and delete contacts, please refer to the Contacts topic.

Note: You will be able to add, edit, or delete accounts based on the permissions provided by the SupportCenter Plus administrator.

Adding a New Account

To add a new account information

1. Log in to the SupportCenter Plus application with your **user name** and **password**.
2. Click the **Accounts** tab in the header pane.
3. Click **New Account** button to open the **New Account** form. Alternatively, you can also open the New Account form by clicking the **New Account** link available just below the header tabs. You will have to provide the account details, the address details, and any description about the account, if needed.
4. Enter the **Account Name**, which is a mandatory field.
5. Enter the phone number, fax, and website address, if available, in the respective fileds.
6. From the **Support Plan** drop down list select the respective plan for which the customer has signed an agreement with your organization.
7. From the Industry drop down list select the industry type to which the account/customer's business belongs to.
8. Enter the annual revenue of the organization, if the details are available.
9. If you know the time zone to which the customer belongs to, then select the corresponding time zone from the Time Zone drop down list.
10. Enter the address details, such as Door No., Street, City, landmark, State, Country, Zip/Postal Code, and any general contact e-mail ID in the corresponding fields in the **Address** block.
11. Click **Save**.

Editing an Account

To edit an account information

1. Log in to the SupportCenter Plus application with your **user name** and **password**.
2. Click the **Accounts** tab in the header pane.
3. Click edit icon button to open the account in the editable mode. Alternatively, you can click the **Company Name** in the All Contacts view and then click **Edit Account** button.
4. You can edit all the fields available in the Edit Contact form, including the **Login Name**.
5. Click **Update**.

A success message intimating that the account has been updated will be displayed.

Deleting an Account

To delete an account information

1. Log in to the SupportCenter Plus application with your **user name** and **password**.
2. Click the **Accounts** tab in the header pane.
3. Select the check box available in the row of the account name that you wish to delete.
4. Click the **Delete** button. A confirmation dialog pop-up.
5. Click **OK** to proceed with the deletion of the account information. Click **Cancel** to retain the account information.

Alternatively,

1. Click the **Account Name** in the **All Accounts** view.
2. Click the **Delete Account** button on the top right corner of **View Account Details** block. A confirmation dialog pop-up.
3. Click **OK** to proceed with the deletion of the account information. Click **Cancel** to retain the account information.

	Warning: When you delete an account, the associated contacts will also be deleted from the database.

Associating a Product to an Account

The customer information also needs to hold information on which are the products that the customer has bought. To assciate a product to an account

1. Log in to the SupportCenter Plus application with your **user name** and **password**.
2. Click the **Accounts** tab in the header pane.
3. Click **Comapny Name** in the **All Accounts** list view. In the **View Account Details** page, you will have a products block where you can associate a product to the account.
4. Click **Associate Product**. The **Associate Product** form opens in a pop-up window with the **Customer Name** in the non-editable mode.
5. Select the product name to be associated to the account from the **Product Name** drop down list.
6. Enter the **Date of sale** by selecting the date from the calender icon.
7. Enter the **Warranty Period** if it is available.
8. Enter the **No. of units** of the product purchased by the customer.
9. Enter the **Unit Price** of the product, **Discount** provided, and the **Tax Rate** applied. This will calculate the Net Price of the product automatically.
10. Click **Save**.

The associated product will get added in the product block.

Importing Accounts and Contacts from CSV File

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

1. Log in to the SupportCenter Plus application with your **user name** and **password**.
2. Click the **Accounts** tab in the header pane.

Step 1: Upload CSV file

1. Click **Import Accounts/Contacts from CSV** link in the **All Accounts** 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: Map Columns

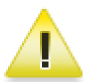
This section has option for importing both account and contact information at the same time. By doing this you can establish the contact - account relationship also and provide self service login to the contacts in just one import. For this, the CSV must have the account name associated to every individual contact name available in the file.

1. The CSV column names are populated in the select boxes beside each label. Map the application contact 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 contact details. 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 in the pop-up.

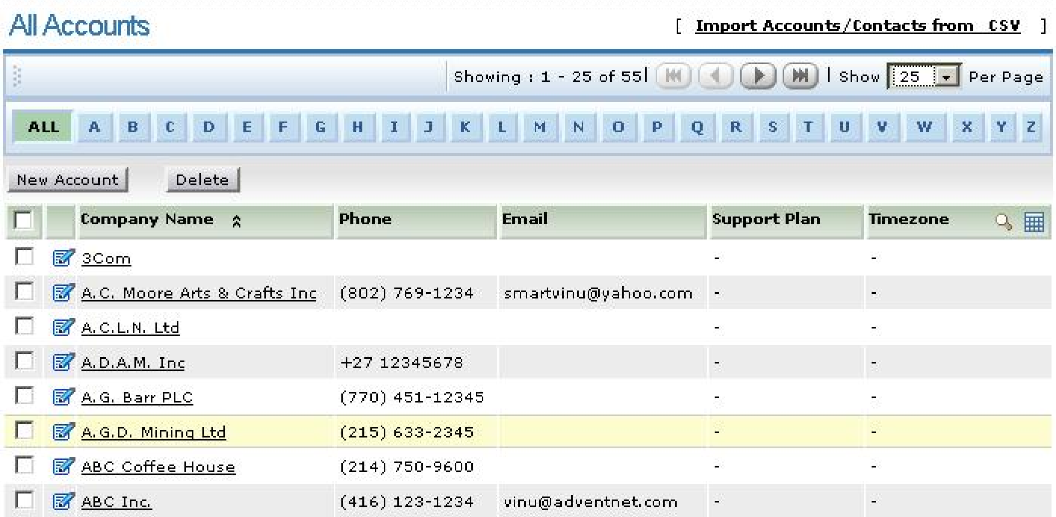
If at any point you wish to stop importing from the CSV file, click the **Exit** button.

	**Warning:** Login name column will be the identifier for contacts. No two contacts can have the same login name. Hence the existence of a contact 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 contact list and import again or manually edit the information available.

Searching Accounts

To search accounts

1. Log in to the SupportCenter Plus application with your **user name** and **password**.
2. Click the **Accounts** tab in the header pane.
3. In **All Accounts** view, click the alphabet with which the name of the account starts. This lists the accounts whose name starts with that alphabet.



Alternatively, you can also search accounts from the **Search** available on the left menu in the other pages of the application.

1. From the **Search in** combo box, select **Accounts**.
2. Type your search string in the **Enter Keyword** text field.
3. Click **Go** or press **Enter**. The account names that match the search string are listed in a separate pop-up window.

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

1. Click the search icon at the end of the accounts list view header. 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. 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.

Customizing Accounts List View

To customize the accounts list view

1. Log in to the SupportCenter Plus application with your **user name** and **password**.
2. Click the **Accounts** tab in the header pane.
3. Click the column edit icon available at the corner of the accounts 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. You can also sort the list view based on columns. To sort contact 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.

Contacts

The main objective of the customer support team would be to keep track of the various customer related information and keep it up-to-date. SupportCenter Plus allows you to keep track of your customer accounts and their contact information. The contact information tracking enables you to have a tab on what is the latest progress on the status of the customer, the type of customer and other such related information. You can add, edit, or remove the contacts in the SupportCenter Plus application and also provide them with login permissions to access the **self-service portal**, where they can login to check the status of the requests that they have posted to the customer support team. The following sections will elaborate on the various actions that you can perform on a contact information other than adding a new contact and associating it to an account.

Note: You will be able to add, edit, or delete contacts based on the permissions provided by the SupportCenter Plus administrator.

Adding a New Contact

To add a new contact information

1. Log in to the SupportCenter Plus application with your **user name** and **password**.
2. Click the **Contacts** tab in the header pane.
3. Click **New Contact** button to open the **New Contact** form. Alternatively, you can also open the New Contact form by clicking the **New Contact** link available just below the header tabs. You will have to provide the contact details, the login details, and any description about the contact, if needed.
4. Enter the contact **Name**, which is a mandatory field.
5. Enter the e-mail ID, phone number, mobile number, and Job title in the respective fileds.
6. From the **Account Name** drop down list select the name of the account to which you wish to associate the contact to.
7. To provide the login permissions to the Self-Service Portal to the contact, enter the **login name** and **password** in the fields under the Login details block.
8. Enter the password again in the **Re-type Password** field.
9. If you wish to provide any description for the contact that you are adding, please provide the same in the **Description** text box.
10. Click **Save**.

To send the login details to the contact, you need to enable the **Notify Contact on Self-service login info** option in the **Notifications Rules** under the **Admin** tab. Refer to Configuring Notification Rules section for details on how to set the notification rules.

Editing a Contact

To edit contact information

1. Log in to the SupportCenter Plus application with your **user name** and **password**.
2. Click the **Contacts** tab in the header pane.
3. Click edit icon button to open the contact in the editable mode. Alternatively, you can click the **Name** of the contact in the All Contacts view and then click **Edit Contact** button.
4. You can edit all the fields available in the Edit Contact form, including the **Login Name**.
5. Click **Update**.

To reset the password of the contact

1. Click the **Reset Password** link available beside the **Password** field in the **Edit Contact** form. The **Reset Password** dialog pops up.
2. Enter the password in the **New Password** field.
3. Click **Reset Password**. The pop-up refreshes with a success message.
4. To close the pop-up, click the **Close** link available in the top right corner of the pop-up window.

Note: To intimate the change of password to the requester automatically once you have reset the password, you need to enable the **Notify Contact on Self-service login info** option in the **Notifications Rules** under **Admin** tab.

Deleting a Contact

To delete a contact information from the application

1. Log in to the SupportCenter Plus application with your **user name** and **password**.
2. Click the **Contacts** tab in the header pane.
3. Select the check box available in the row of the contact details that you wish to delete.
4. Click the **Delete** button. A confirmation dialog pop-up.
5. Click **OK** to proceed with the deletion of the contact information. Click **Cancel** to retain the contact information.

Alternatively,

1. Click the contact **Name** in the **All Contacts** view.
2. Click the **Delete Contact** button on the top right corner of **View Contact** block. A confirmation dialog pop-up.
3. Click **OK** to proceed with the deletion of the contact information. Click **Cancel** to retain the contact information

Importing Contacts from CSV File

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

1. Log in to the SupportCenter Plus application with your **user name** and **password**.
2. Click the **Contacts** tab in the header pane.

Step 1: Upload CSV file

1. Click **Import Contacts from CSV** link in the **All Contacts** 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: Map Columns

1. The CSV column names are populated in the select boxes beside each label. Map the application contact 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 contact details. 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 in the pop-up.

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

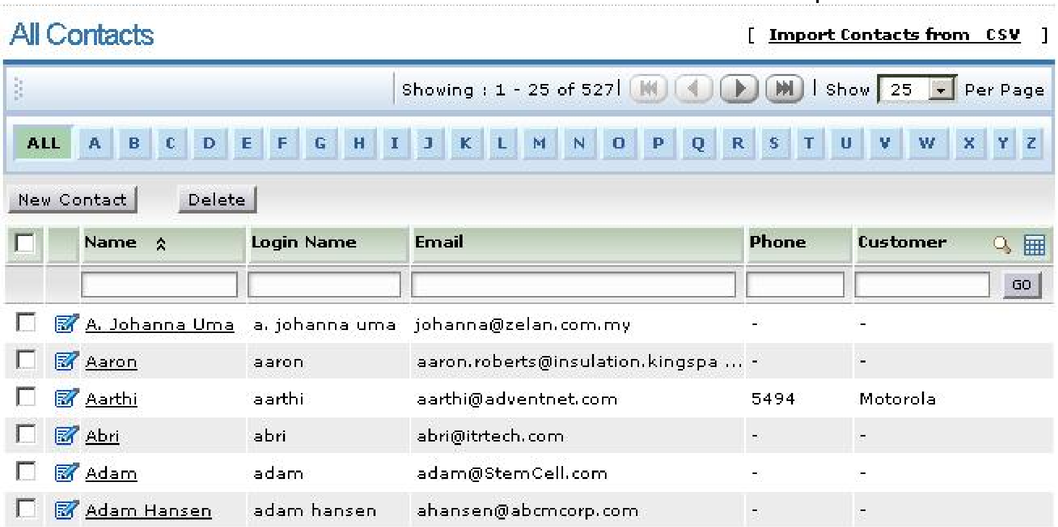
Warning: Login name column will be the identifier for contacts. No two contacts can have the same login name. Hence the existence of a contact will be checked based on the login name value.

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 contact list and import again or manually edit the information available.

Searching Contacts

To search contacts

1. Log in to the SupportCenter Plus application with your **user name** and **password**.
2. Click the **Contacts** tab in the header pane.
3. In **All Contacts** view, click the alphabet with which the name of the contact starts. This lists the contacts whose name starts with that alphabet.



Alternatively, you can also search contacts from the **Search** available on the left menu in the other pages of the application.

1. From the **Search in** combo box, select **Contacts**.
2. Type your search string in the **Enter Keyword** text field.
3. Click **Go** or press **Enter**. The contact names that match the search string are listed in a separate pop-up window.

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

1. Click the search icon at the end of the contact 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. 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.

Customizing Contact List View

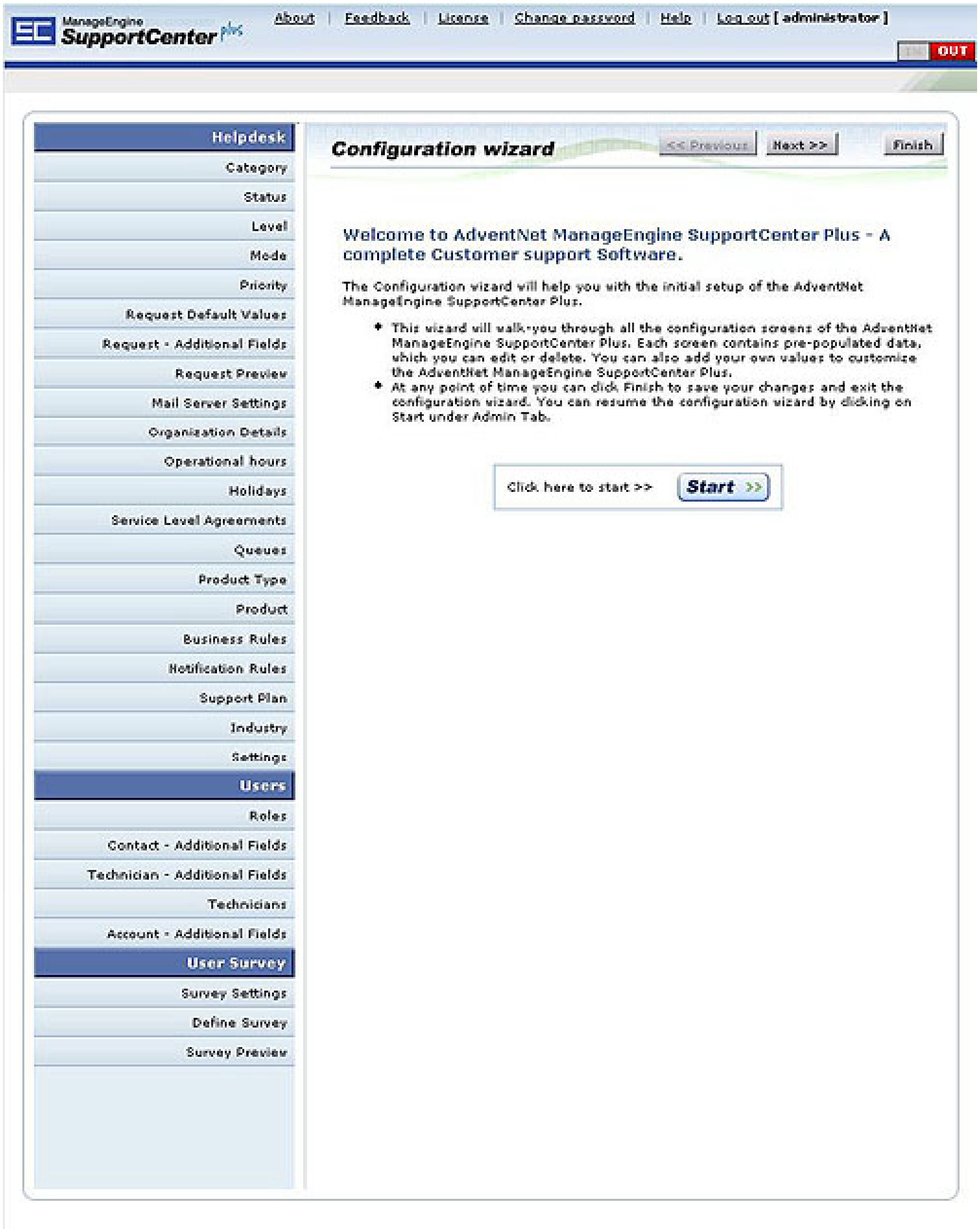
To customize the contact list view

1. Log in to the SupportCenter Plus application with your **user name** and **password**.
2. Click the **Contacts** tab in the header pane.
3. Click the column edit icon available at the corner of the contact 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. You can also sort the list view based on columns. To sort contact 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.

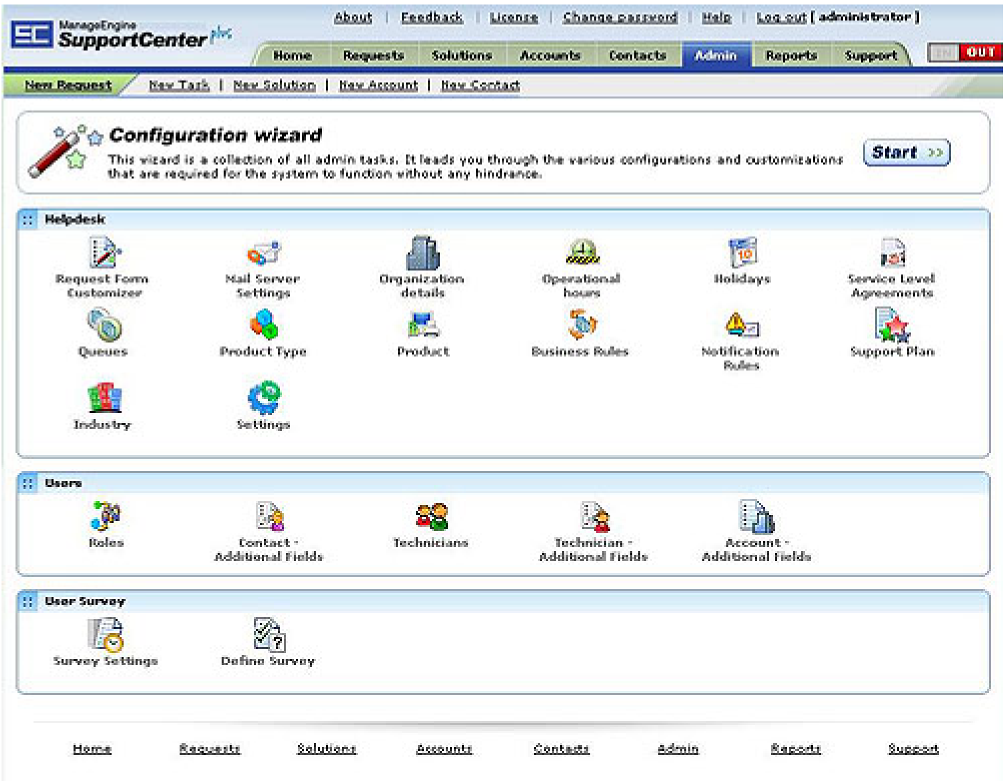
Configurations

In ManageEngine SupportCenter 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 SupportCenter 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 **Finish** button closes the configuration wizard and takes you straightaway to the **Admin** Home page, where you can perform all the configurations. The **Admin** page looks as shown below:



The various configurations are grouped under the following major heads:

- Helpdesk Configurations
- User Management
- User Survey

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

Help Desk Configurations

Various helpdesk related configurations need to be performed by the admin user, before the SupportCenter Plus request module can be opened for real time functioning of fetching the customer support 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 support reps solve the reported issue faster:

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

There are other configuration that need be done are:

1. Mail Server settings
2. Organization details
3. Operational hours of the organization
4. Holidays
5. Service Level Agreements
6. Queues
7. Product Types
8. Product
9. Business Rules
10. Notification Rules
11. Support Plan
12. Industry
13. General Settings

To access the helpdesk configurations:

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

Request Form Customizer

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

Configuring Category

The requests can be grouped under proper categories. For example, a request from a prospect for an invoice for a particluar product can be classified as a Purchase request category, while a request describing a problem that is faced by the customer, while using a purchased product can be classified under the Service request category. You can also create sub-categories for the parent, which can be the different products or types of services that are provided in your organization. Depending on the need of your organization, you can create various such categories. These categories, will be listed in the drop-down menu in the **New Request** form.

To open the category configuration page

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

Add Category

To add a request category

1. Click the **Add New Category** link available at the right top corner of the **category list** page.
2. In the **Add Category** form, enter the **Category Name**.
3. Select the parent category to which you wish to add the category. If you want it at the first level, then choose **Category Root**. Otherwise you need to select the category name for which you want this to be a sub-category.
4. If you wish, you can enter the category **Description** and also assign the default **Support Rep** who will be handling the requests submitted in the specified category. Please note that you cannot create two categories with the same **Category Name**.
5. Click **Save**. The new category is added.

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

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

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

Edit Category

To edit an existing category

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

2. In the **Edit Category** form, you can modify the name of the category, the parent category to which it belongs to, description, and the default support rep assigned to the category.
3. Click **Save** to save the changes. At any point, if you wish to cancel the operation that you are performing, click **Cancel**.

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

Delete Category

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

Configuring Status

The requests that are received in SupportCenter Plus will be taken up by the support reps 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, SupportCenter 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 SupportCenter 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 contact 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 SupportCenter 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. SupportCenter Plus provides you the option of submitting the request through an online form. Instead, a contact 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 SupportCenter 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 SupportCenter Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Request Form Customizer** icon . The next page displays the list of request form attributes that can be customized on the left menu and the category list page.
4. Click **Mode** from the left menu. The **Mode List** page is displayed. You can add, edit, or delete the request mode.

Add Mode

To add a request mode

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

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

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

Edit Mode

To edit an existing mode

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

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

Delete Mode

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

Configuring Priority

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

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

Add Priority

To add a request priority

1. In the **Priority List** page, click the **Add New Priority** link at the top right corner.
2. In the **Add Priority** form, enter the **Priority Name** and **Priority Order**. These two are mandatory fields and cannot have duplicate values. If you wish, you can enter the priority **Description** also.
3. Click **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**.

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

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

Edit Priority

To edit an existing priority

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

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

Delete Priority

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

Configuring Request Settings

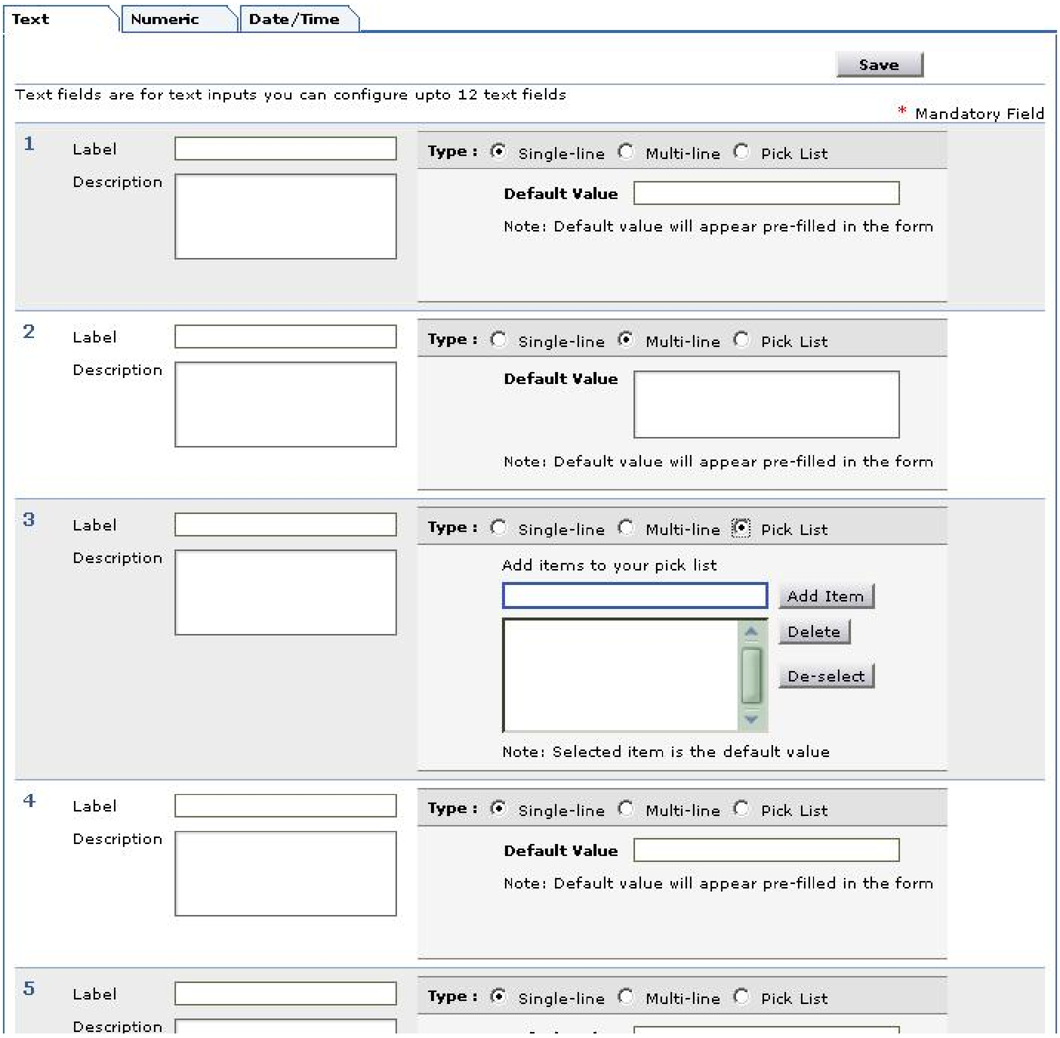
You can set the default values for each of the configuration parameters available in SupportCenter Plus application for the SupportCenter Plus request form. These default configurations, once set, will be reflected in the new request form as default values. The contact can change the values while submitting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

1. Login to the SupportCenter Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Request Form Customizer** icon . The next page displays the list of request form attributes that can be customized on the left menu and the category list page.
4. Click **Request Default Values** from the left menu. The **Request Default Values** page is displayed. You can set the default values for the request category, level, mode, and priority.
5. From the **Default Category** combo box select the default category value which you wish to set for every new request. Similarly, choose the values of your choice from each of the combo boxes for the default request level, mode, and priority.
6. Click **Save**. This saves the request default settings.

Configuring Additional Fields

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

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



The default tab selected is **Text.**

5. To add the text fields, enter the label name in the form fields below the **Label** heading. If required, enter the description for the field.
6. You can choose the type of text field that you wish to add by selecting the radio buttons. A Single-line text field allows you to add just a text field. The Multi-line text field allows you to add a text box where a lengthy description can be added. A Pick List allows you to add a list menu from which you can select. In all the three cases, you can add default values for the text field in the space provided for the same.
7. To add items for the pick list, enter the value in the text filed and click **Add Item**. The value will get added to the list below. To select the default selected value of the list, click on the value in the list.
8. To add numeric fields, click the **Numeric** tab and then enter the label name in the form fields provided.
9. To add Date/Time fields, click the **Date/Time** tab and enter the required details.
10. Click **Save**. A message is displayed saying that the additional field is successfully created.

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

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

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

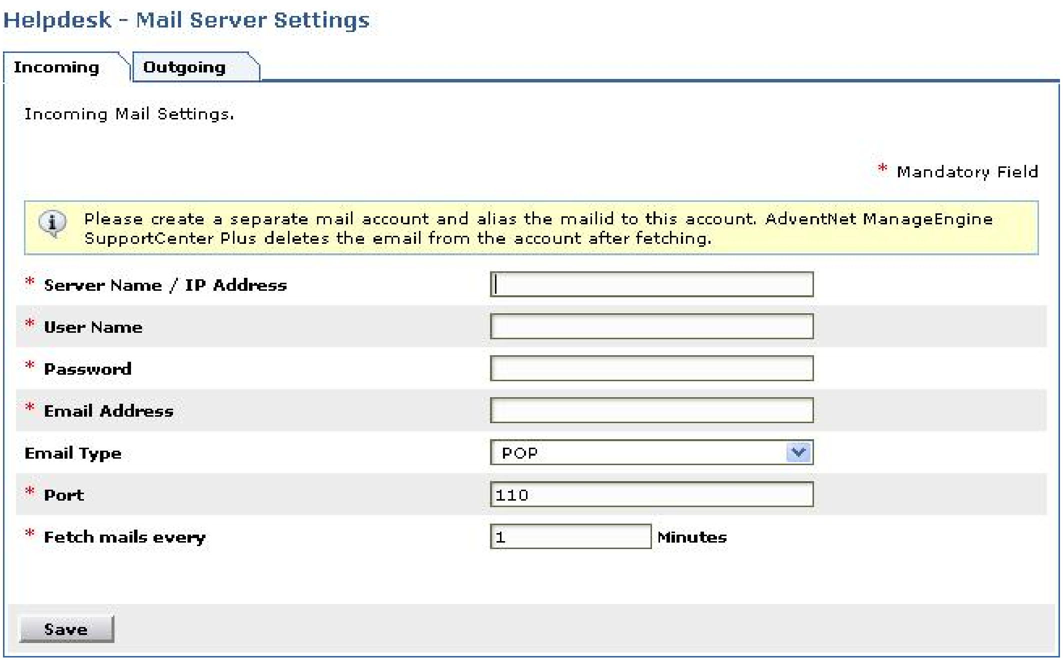
Configuring Mail Server Settings

SupportCenter 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 support reps and contacts. SupportCenter Plus Mail Server Settings enables you to do it.

Incoming Mail Settings

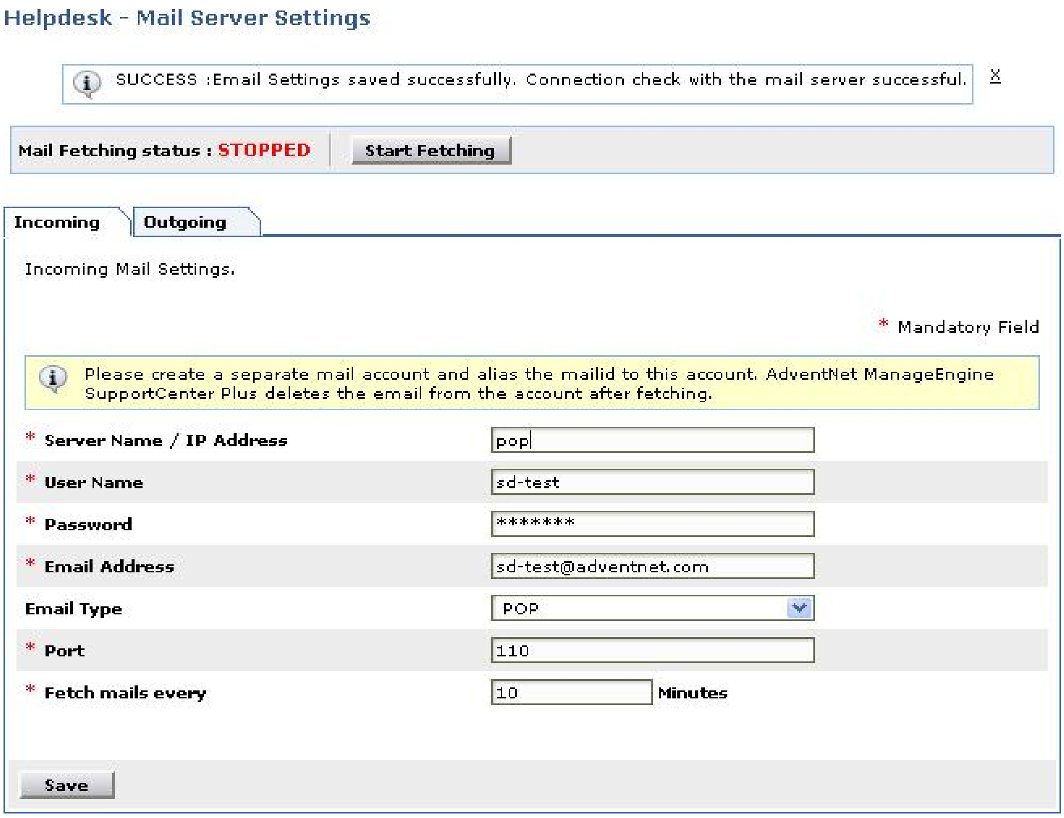
To configure the incoming e-mail settings

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



4. All the fields marked * are mandatory fields. Enter the server name, user name, password, e-mail address, port, and the time interval in which the mail needs to be fetched periodically. The time period is in minutes. The e-mail type is a combo box from which you need to select the value.

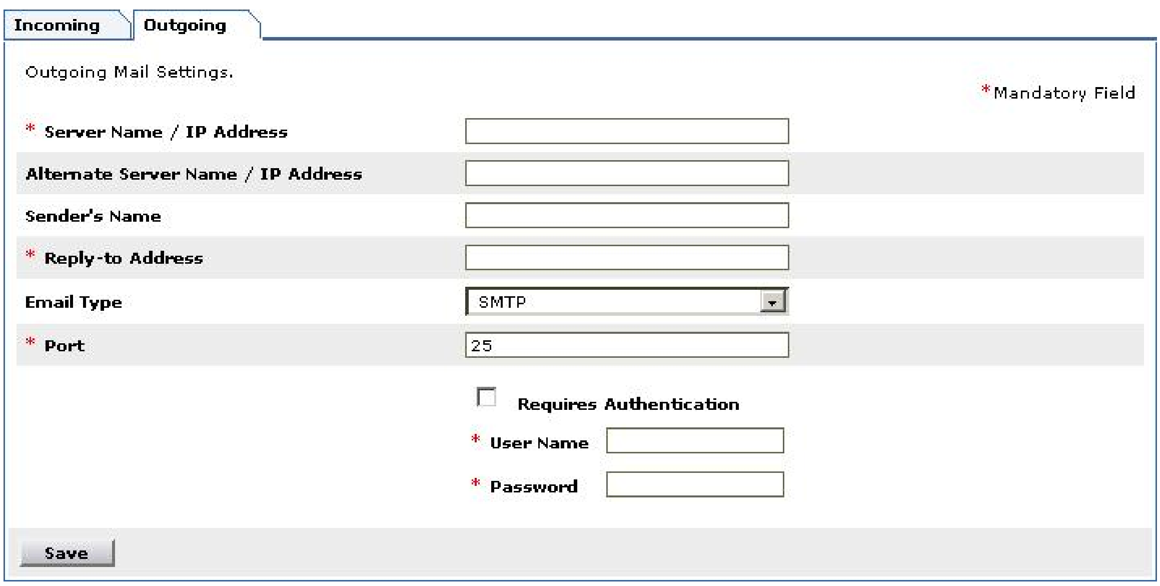
5. Click **Save**. On successful connection to the server, the success message is displayed and the UI changes as below:



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

Outgoing Mail Settings

To configure the outgoing mail settings



1. In the **Email Settings** page, click the **Outgoing** tab. The outgoing mail settings form is displayed as above.
2. Enter the outgoing mail server name / IP address, reply-to e-mail address, and port. These three are the mandatory fields.
3. If there is an alternate server, then enter its name in the **Alternate Server Name / IP Address** field.
4. Enter the name of the sender in the **Sender's Name** field.
5. Choose the e-mail type, which is usually SMTP. The Port associated to SMTP is 25 by default.
6. If your SMTP server for outgoing mails require authentication, then select the check box **Requires Authentication**.
7. Enter the **User Name** and **Password** in the respective fields.
8. Click **Save**.

Configuring Organization Details

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

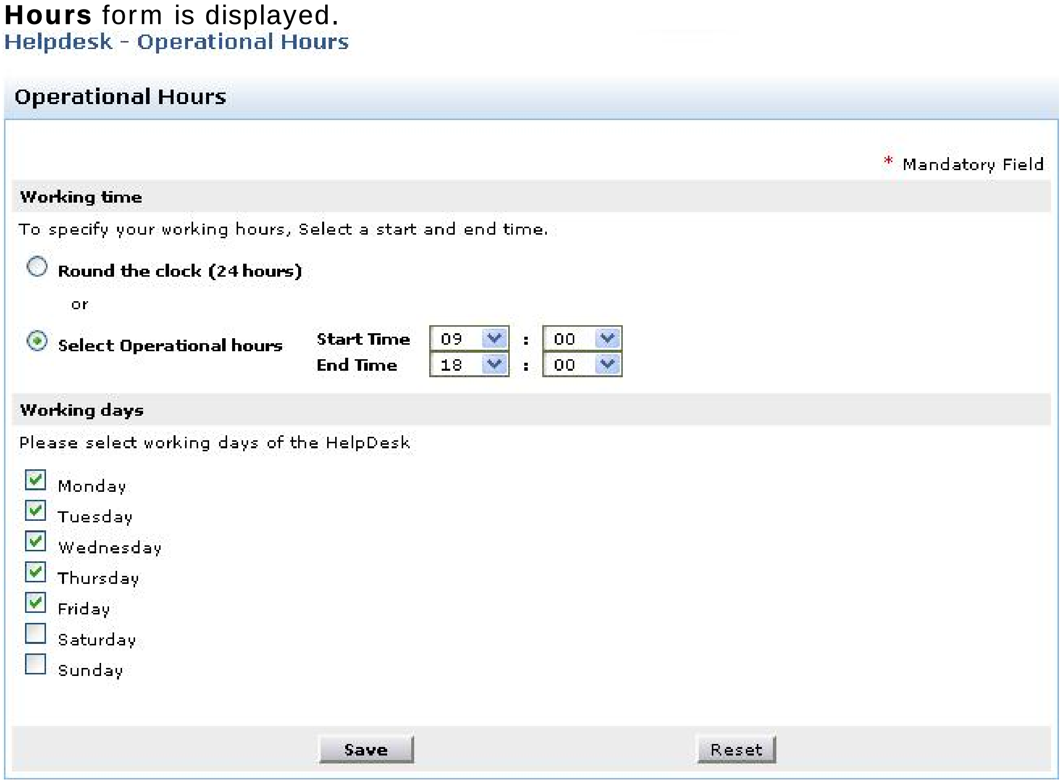
1. Login to the SupportCenter Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Organization** icon. The **Organization Details** form is displayed.
4. Enter the **Name** of your organization. You cannot leave the name field empty. The other fields can be empty. But if you have the required information, then enter them as explained in the following steps.
5. The **description** field can contain information about what your organization specializes.
6. The next block collects the **address** of your organization. Enter the address details in the relevant fields, such as address, city, postal code, state, and country.
7. If you have a common contact e-mail ID, then enter the same in the **E-mail ID** field.
8. Enter the phone and fax number, and the URL of your company's web site.
9. You can import the company logo and use that in places where the organization details are being used.
    1. Click **Import Image** button beside the Company **Logo field**.
    2. Click the **Browse** button and choose the image file from the file chooser window and click **Open**.
    3. Click **Import**.
10. By default, the **Use this image** check box is enabled. If you do not wish to use this image, then disable the check box.
11. Click **Save**.

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

Configuring the Operational Hours

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

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



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

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

Configuring Holidays

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

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

Add Holidays

To add holidays

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

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

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

Edit Holidays

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

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

Delete Holidays

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

Configuring Service Level Agreements

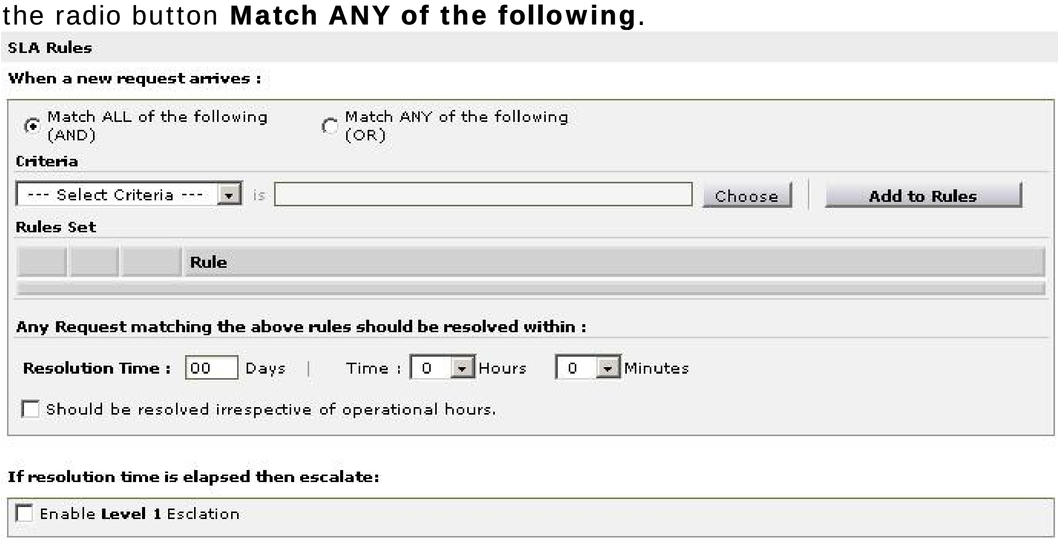
You can have service level agreements (SLAs) defined for intra-organization service provided by the IT help desk team. These SLAs help evaluating the efficiency, effectiveness, and responsiveness of your help desk team. The SLAs can be defined for each individual, or departments, or workstations. When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

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

Add New Service Level Agreement

To add an SLA

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



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

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

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

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

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

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

Edit Service Level Agreement

To edit an existing SLA

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

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

Delete Service Level Agreement

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

Organize Service Level Agreements

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

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

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

Configuring Queues

Request Queues denote the temporary location where the various incoming requests can be categorized and grouped till a support rep can pick up or the request is assigned to a specific support rep by the help desk administrator. Each queue can have a group of support reps incharge of handling the requests pertaining to that queue. You can configure these queues in such a way that notifications can be sent to support rep group who belong to the queue regarding a new request creation. These queues, will be listed in the drop-down menu in the **New Request** form.

To open the queue configuration page

1. Log in to the SupportCenter 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 **Queues** icon . You can add, edit, or delete queues.

Add Queue

To add a request queue

1. Click the **Add New Queue** link available at the right top corner of the **Queue list** page.
2. In the **Add Queue** form, enter the queue name in the **Name** field.
3. Select the support reps that you wish to group under this queue from the **Available Support Reps** list box and click >> button to move them to **Support Reps interested in this queue**.
4. You can choose the support reps of the queue to whom you wish to notify for a new request creation in the queue. To do this select the check box **Send notification to queue support rep(s) when a new request is added to this queue**. This drops down the support rep selection field.
5. Click **Choose** button to open the **List of Queue Support Rep** pop-up window.
6. Select the support reps whom to wish to notify and click **OK**.
7. To choose the support reps to send notification for unpicked requests in the queue, select the check box **Send notification to support rep(s) when a request in this queue is left unpicked**. This drops down the support rep selection field and time period configuration after which the notification will be sent.
8. Click **Choose** button to open the complete list of support reps available in your help desk.
9. Select the support reps from the list box and click **OK**. The support reps get listed in the field provided.
10. Enter the time period, from the creation of the request in queue, after which the notification of unpicked requests will be sent to the selected support reps.
11. If you wish to describe the queue in detail enter the same in the **Description** text box.
12. Click **Save**. The new queue is added.

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

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

Warning: Enabling the check boxes while adding queue does not ensure that the notification will be sent. This setting is just to choose the support reps 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 queue support rep by mail when request is added to queue.
2. Notify support rep by mail when request is unpicked in queue.

Edit Queue

To edit an existing queue

1. In the **Queue List** page, click the **edit** icon beside the queue name that you wish to edit.
2. In the **Edit Queue** form, you can modify the name of the queue, the support reps belonging to the queues, 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 queue, if you wish to add a new queue, then click **Save and add new** button instead of clicking **Save** button after making the changes.

Delete Queue

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

Configuring Product Types

Each product 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 products that you have in store for sale.

To open the product type configuration page

1. Log in to the SupportCenter 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 a new product is added to your available choices for customers, you need to add it here. Also, if you do not wish to sell a specific product anymore, then it needs to be discarded from the list by deleting the details of the same.

To open the product configuration page

1. Log in to the SupportCenter 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 **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. From the **Product Type** combo box choose the product type under which you wish to classify the product that you are adding.
4. Enter the **Part No.** of the product.
5. 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.
6. Enter the **Unit Price** of the product in the field provided for the same.
7. If required, add relevant **Comments** for the product.
8. Click **Save**. A message is displayed and the product is added.

If you wish to add more than one product, 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. To get back to the product list page, click **View List** link at the top right corner of the **Add Product** form.

Edit Product

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 **Save**. A message is displayed and the product is updated.

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

A product can be deleted only if it is not being referenced elsewhere. To delete a product

1. Click the delete icon beside the **Product Name**. A confirmation dialog is opened.
2. Click **OK** to proceed with the deletion. If you do not wish to delete the product, click **Cancel**.

Configuring Business Rules

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

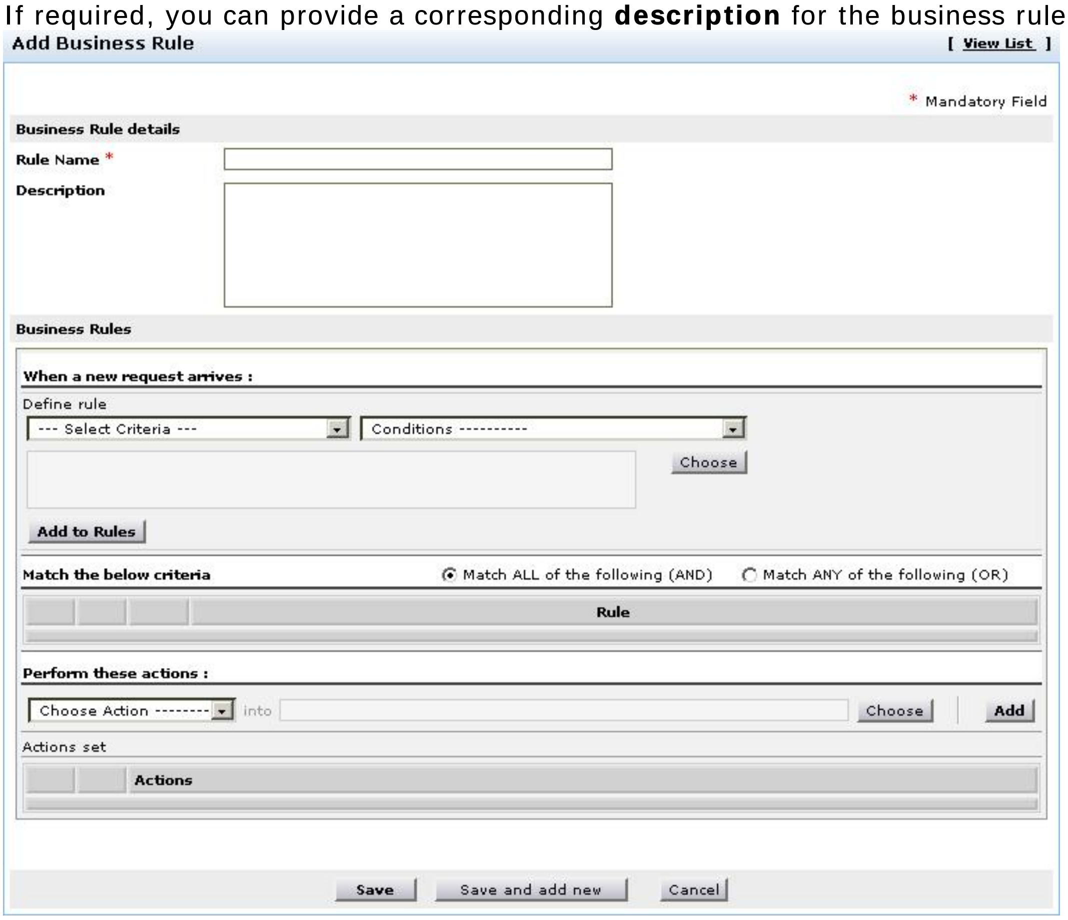
To open the Business Rule configurations page:

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

Add New Business Rule

To add a Business Rule

1. Click **Add New Business Rule** link available at the top right corner of the **Business Rules List** page.
2. In the **Add Business Rule** form, enter the **Rule Name**. This field cannot be empty.
3. If required, you can provide a corresponding **description** for the business rule.



4. In the Business Rules block define the rules and criteria that need to be satisfied by the incoming request. Set the criteria by selecting from the **Select Criteria** combo box, and then choose conditions, and then the individual values that need to be matched by clicking the **Choose** button. This will open the values from the database for that particular parent criteria that you chose from the combo box. Choose the values you want and click **Select**. For example, if you want to match the contact name John, then select **Contact Name** in the combo box. Now select the condition **is** or **is not** from the drop down list. This list varies from each criteria. Then, click **Choose** button, to open the list of contacts in a pop-up window. Select the contact name from the list and click **Select**. For multiple selection, press **Shift** or **Ctrl** key while selecting the names. The selected names will appear in the text box just before the choose button.
5. Click **Add to Rules** to add the defined rule to the rules table.
6. By default, the radio button **Match ALL of the following is selected**. If you do not want all of them to be checked but if it is enough if any one of the rules are matched, then select the radio button **Match ANY of the following**. After defining the rules, you need to define the actions that need to be performed on the request matching the criteria.
7. Choose the action that needs to be performed on the request from the **Choose Action** drop down list.
8. Click **Choose** button to the select the values for the chosen action. For example, if the action you had chosen was to **Place in Queue**, then clicking the choose button will display the available queues in which the request can be placed. You need to select the queue in which the request has to be placed and click **OK**.
9. Click **Add**.
10. Click **Save**.

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

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

Edit Business Rule

To edit an existing business rule

1. In the **Business Rules List** page, click the edit icon beside the **Business Rule Name** that you wish to edit.
2. In the **Edit Business Rule** form, you can modify all the fields mentioned in the add business rule form.
3. To edit the **Match the below criteria** set, click the **edit** icon beside the individual criteria. The respective selection window is opened in a separate pop-up. You can choose more values or remove a few values by deselecting them.
4. You can also delete a criteria completely. To delete a criteria, click the delete icon beside the individual criteria.
5. In the actions to be performed, you can add or delete actions that need to be performed on the request that matches the criteria defined.
6. Click **Save** to save the changes performed. At any point you wish to cancel the operation that you are performing, click **Cancel**.

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

Delete Business Rule

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

Organize Business Rules

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

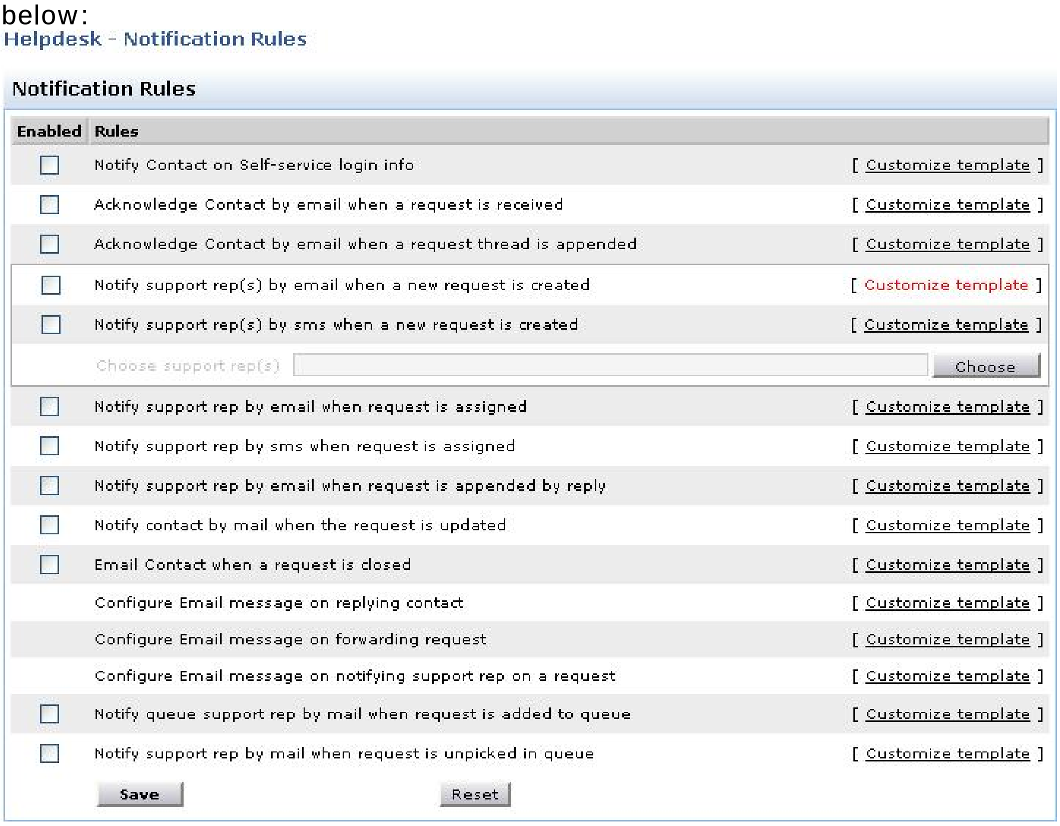
1. Click **Organize Business Rules** link available above the list of business rules in the **Business Rules List** view. A pop-up window is opened with the list of available business rules in the order that is appearing the list view.
2. Select a business rule, and click **Move up** or **Move Down**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

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

Configuring Notification Rules

ManageEngine SupportCenter Plus allows you send notifications to contacts and support reps. The notifications can be of two types: e-mail and SMS. These notification modes can be set across various options of the requests. 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:

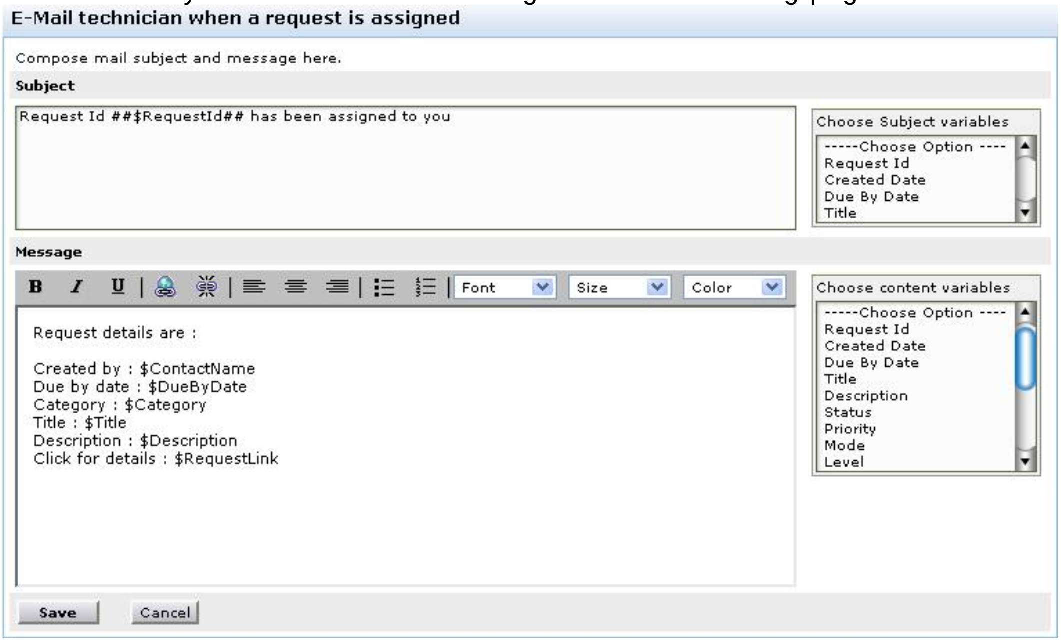
1. Login to the SupportCenter Plus application using the user name and password of an admin user.
2. Click the **Admin** tab in the header pane.
3. In the **Helpdesk** block, click the **Notification Rules** icon . The resulting page is as below:



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 support rep(s) who need to be notified when a new request is created. For this, click **Choose** button. The list of support reps is displayed in a pop-up window.
6. Select the support reps. For multiple selections, press **Shift** or **Ctrl** key and then select the support reps.
7. Click **OK**. The selected support reps get listed in the text box beside the **Choose support rep(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.

Configuring Support Plan

The support plan will be used to indicate the level of support that is being paid for by the customer. For example, let us say a phone and e-mail support combination is available and is named as Gold Support, while Silver Support would just have e-mail support to the customer. Similarly you can define your own combinations or provide your own descriptions for what each of the support plan means for your organization. To open the support plan configuration page

1. Login to the SupportCenter 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 **Support Plan** icon . The next page displays the list of support plans that are already available. You can add, edit, and delete support plans as per your need.

Add Support Plan

To add a support plan

1. In the **Support Plan List** page, click the **Add New Support Plan** link at the top right corner.
2. In the **Add Support Plan** form, enter the **Support Plan Name**. This is a mandatory field.
3. If you wish, you can enter the description for the support plan also in the **Description** field.
4. Click **Save**. The new support plan is added to the already existing list. At any point you wish to cancel the operation that you are performing, click **Cancel**.

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

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

Edit Support Plan

To edit an existing support plan

1. In the **Support Plan List** page, click the edit icon beside the support plan name that you wish to edit.
2. In the **Edit Support Plan** 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 support plan, if you wish to add a new support plan, then click **Save and add new** button instead of clicking Save button after making the changes.

Delete Support Plan

1. In the **Support Plan List** page, click the delete icon beside the support plan 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 support plan, then click **Cancel**.

Configuring Industry

The industry list is used to denote the type of industry to which your customer belongs to while adding the account information of the customer. To open the industry configuration page

1. Login to the SupportCenter 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 **Industry** icon. The next page displays the list of industry types that are already available. You can add, edit, or delete the industries.

Add Industry

To add an industry

1. In the **Industry List** page, click the **Add New Industry** link at the top right corner.
2. In the **Add Industry** form, enter the **Industry Name**. This is a mandatory field.
3. If you wish, you can enter the description for the industry type in the **Description** field.
4. Click **Save**. The new industry type is added to the already existing list. At any point you wish to cancel the operation that you are performing, click **Cancel**.

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

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

Edit Industry

To edit an existing industry type

1. In the **Industry List** page, click the edit icon beside the industry name that you wish to edit.
2. In the **Edit Industry** 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 industry, if you wish to add a new industry, then click **Save and add new** button instead of clicking Save button after making the changes.

Delete Industry

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

Configuring General Settings

This portion of the Admin tasks has a few settings common to all the groups, such as configuring the alias URL and customizing SupportCenter Plus.

To open the General settings page

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

You can enable or disable the **My Tasks** options in the contact login, by choosing either **Yes** or **No** radio button for **Do you want to show My Tasks to Contacts?** question.

You can also choose to display the **People** tab (displaying the tehcnicians' in-out status) to the contact by choosing **Yes** or **No** redio button for the **Do you want to show People tab to Contacts?** question.

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

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.

Customizing SupportCenter Plus

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.

User Management

For making the SupportCenter Plus available and usable for all your customers, you need to add contacts and support reps, and define their roles. This enables the contacts 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 support reps can log in to the SupportCenter 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 contacts, support reps, define roles, and login access permissions.

The various user management configurations that you can perform are

1. Configuring additional fields for the new contact form
2. Configuring support reps and their roles
3. Configuring additional fields for the new support rep form
4. Configuring additional fields for the new customer form
5. Defining Roles

To access the user management related configurations

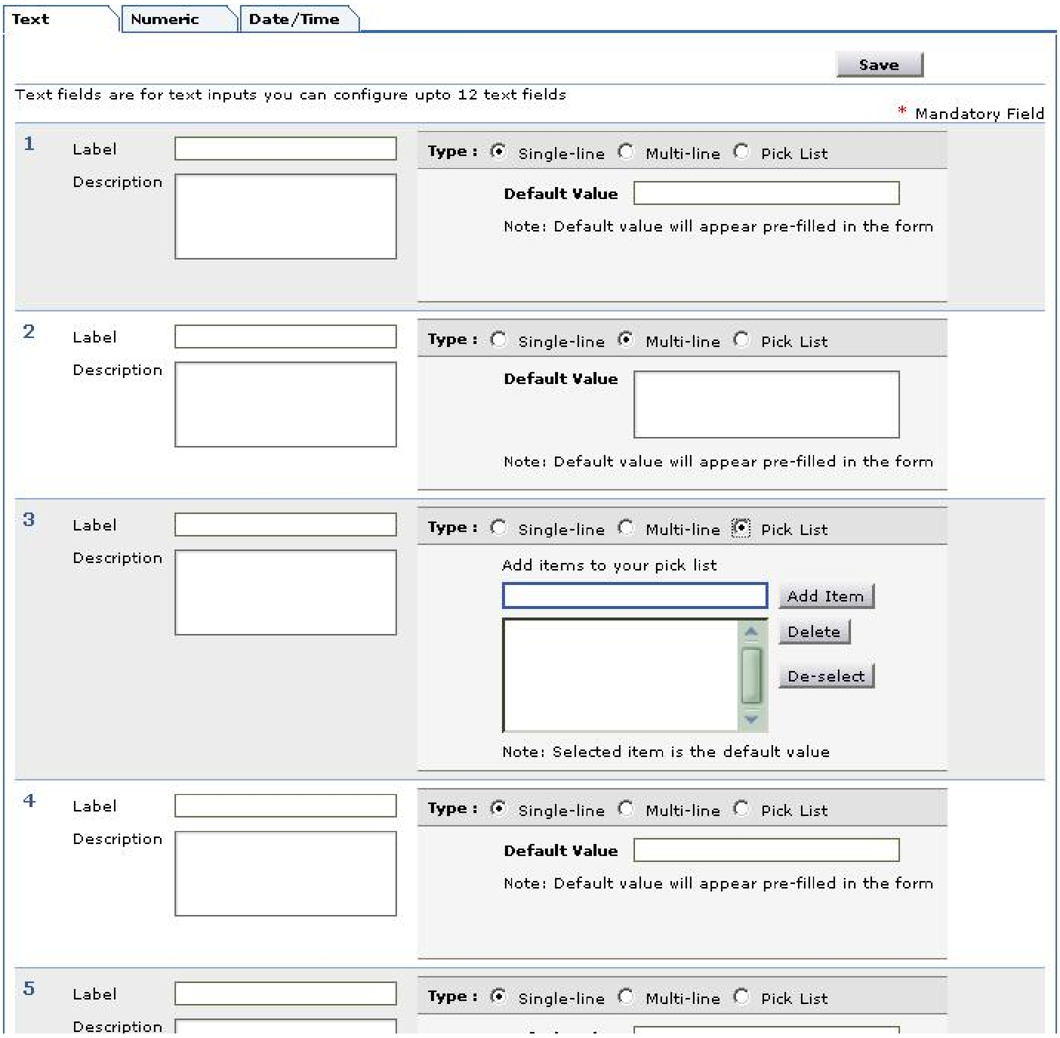
1. Log in to the SupportCenter Plus application using the **user name** and **password** of a SupportCenter Plus administrator.
2. Click the **Admin** tab in the header pane. The **Users** block is below the Asset Management block.

Configuring Contact - Additional Fields

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

To add your own custom fields in the new contact form

1. Login to the SupportCenter Plus application using the **user name** and **password** of a SupportCenter Plus administrator.
2. Click the **Admin** tab in the header pane.
3. In the **Users** block, click the **Contact - 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 Contact Details** in the **New Contact** form. To delete the user-defined fields, in step 4 through 8, 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 Contact form.

Configuring Support Reps

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

To open the support rep configuration page

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

Add Support Rep

To add a support rep and associate a role with him/her

1. Click the **Add New Support Rep** link available in the top right corner of the **Support Rep List** page.
2. In the **Add Support Rep** form, enter the **Full Name** and **Employee ID** of the support rep in the Personal Details block. The name is a mandatory field.
3. In the contact information block, enter a valid **e-mail ID**. If the support rep has a **phone** and a **mobile** number, you can enter the same in the space provided for entering these values.
4. You can also enter the SMS Mail ID if the support rep has one.
5. Enter the cost details of the support rep in the **Cost per hour** field.
6. Select the **department** to which the support rep belongs and enter his/her **job title**.
7. If you have added any organization-specific fields for the new support rep form, those will be available under the **Additional Support Rep Details** block. Enter the relevant information.
8. Now, in the **Login Details** block, you can provide login access to the support rep with specific access privileges or enable administrative privileges for the support rep. To enable login access to the support rep with specific access privileges, select the check box beside the statement **Enable Login for this Support Rep**. This displays the **Assign Role** block just below the login and password fields.
9. 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.
10. In the **Assign Role** block, select the roles from the **Available Roles** list and click the >> button to assign those roles to the support rep. 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. To enable administrative privilages, just select the check box **Enable Administrator Privileges for this Support Rep**.
11. Click **Save**.

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

If you decide to give the login access for the support rep at a later time, you can save the support rep 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 support rep details.

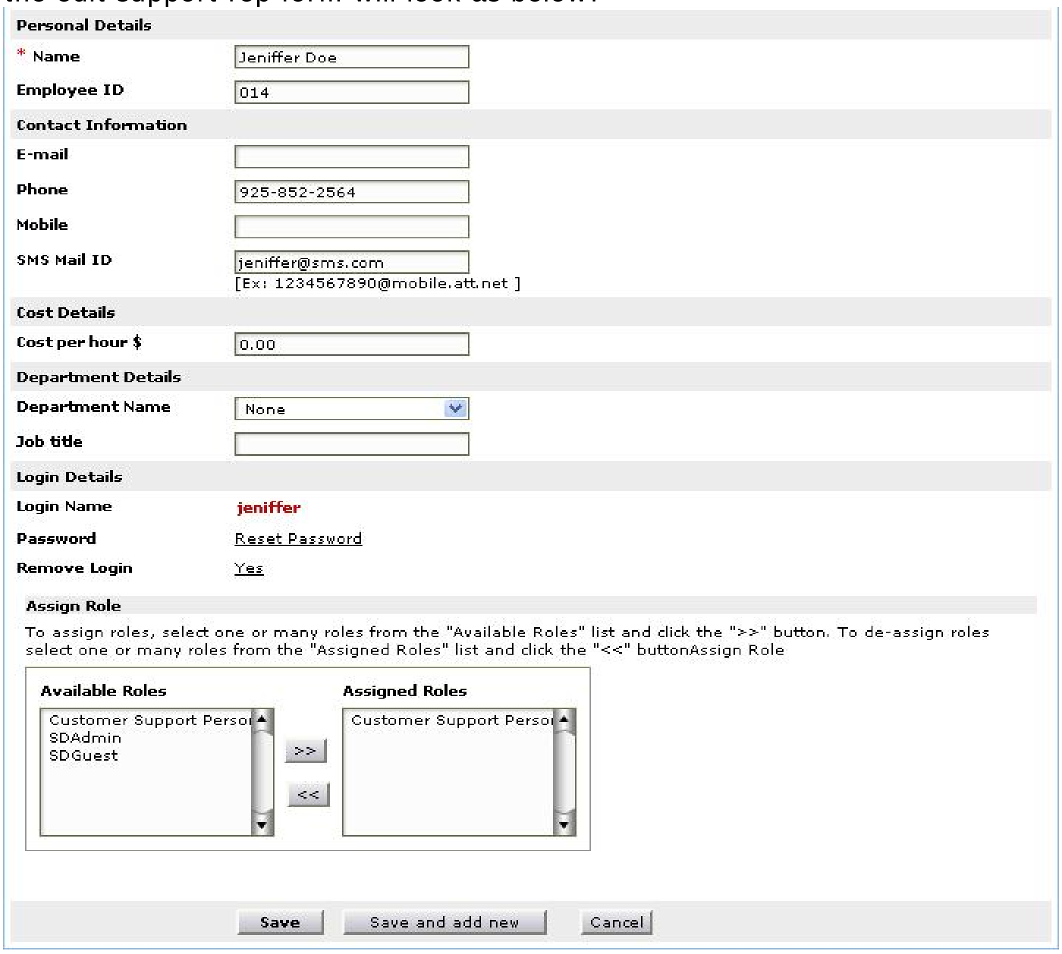
At any point, if you decide not to add the new support rep, then click **Cancel** to get back to the support rep list. Clicking the **View List** link on the top right corner of the add support rep form will also take you to the support rep list view.

Edit Support Rep

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

To edit a support rep information

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



3. In the above form, you can modify all the fields displayed and also change the roles assigned, by adding or removing roles. (To add new roles, refer to the Configuring Roles section.)
4. Click **Save** to save the changes performed. At any point, if you wish to cancel the operation that you are performing, click **Cancel**.

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

You can also ***change the password*** of the support rep from the Edit Support Rep form.

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

3. Click **Reset Password**. If you do not wish to change the password, click **Close** instead of **Reset Password**.
4. In the **Edit Support Rep** form, click **Save**.

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

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

Delete Support Reps

1. In the **Support Rep List** page, click the delete icon beside the support rep'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 support rep, then click **Cancel**.

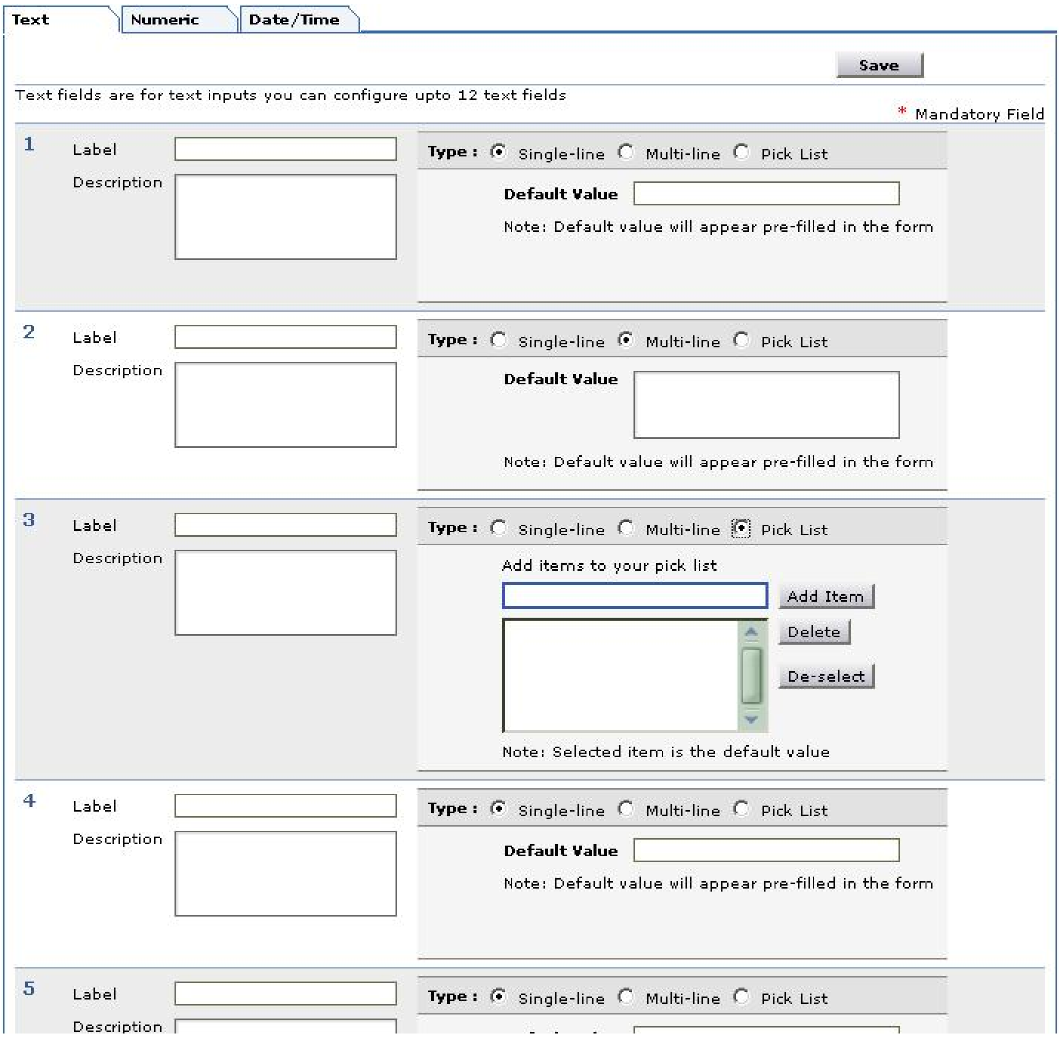
Note: Delete icon will not be available beside the name of the support rep who has currently logged in to the application. To delete that support rep, you need to log out and log in as a different support rep and then delete the details. Also, the administrator support rep details can be deleted only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

Configuring Support Rep - Additional Fields

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

To add your own custom fields in the new support rep form

1. Log in to the SupportCenter Plus application with the **user name** and **password** of a SupportCenter Plus administrator.
2. Click the **Admin** tab in the header pane.
3. In the **Users** block, click the **Support Rep - 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.

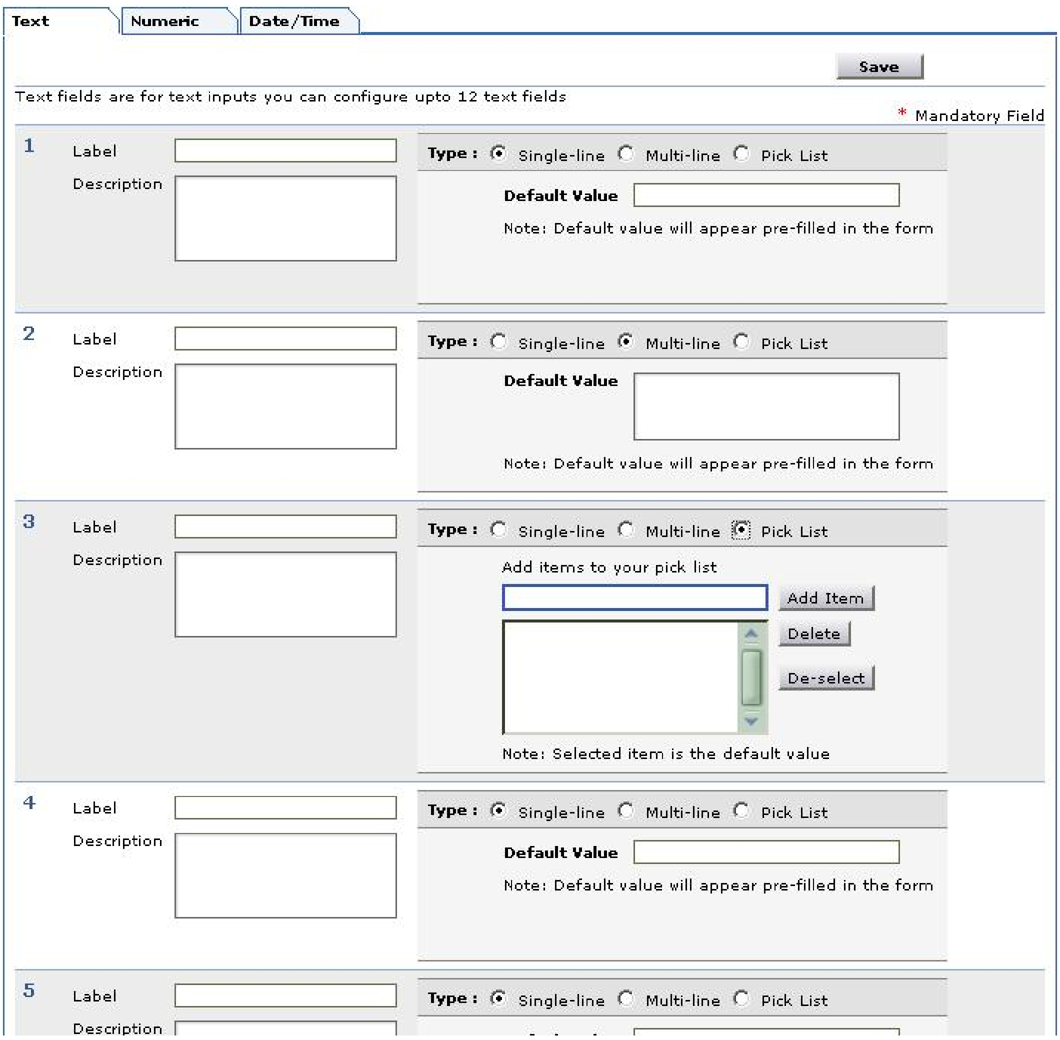
These fields appear under the grouping **Additional Support Rep Details** in the **New Support Rep** form. To delete the user-defined fields, in step 4 through 8, instead of adding the label names, delete the label names that you wish to remove from the fields of the form and click **Save**. The respective fields that you deleted will be removed from the New Support Rep form.

Configuring Account - Additional Fields

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

To add your own custom fields in the new account form

1. Login to the SupportCenter Plus application using the **user name** and **password** of a SupportCenter Plus administrator.
2. Click the **Admin** tab in the header pane.
3. In the **Users** block, click the **Account - 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 Account Details** in the **New Account** form. To delete the user-defined fields, in step 4 through 8, 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 Account form.

Configuring Roles

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

To open the role configuration page

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

Add Role

To add a role

1. Click the **Add New Role** link available at the top right corner of the **Role List** page.
2. In the **Add Role** form, enter the **Role Name**. This field cannot be empty and needs to be unique.
3. Set the **access permissions** for the role. To set the access permission, just select the check boxes beside the access levels defined for each of the modules of the application. For example, if you want to provide add permissions for the account and solution modules and only view permissions for the request module, select the check box below **Add** against the **Accounts** and **Solutions** modules. For the request module, select the check box below **View**. Selecting the **Add** check box automatically enables view permissions also.
4. You can also choose to restrict the support rep 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:
    1. **All**: The support rep with this role can view all the requests that are received in SupportCenter Plus.
    2. **All in Queue & assigned to him**: The support rep will be able to view all the requests in the queue to which he/she belongs to and also those requests that are assigned to him/her.
    3. **Assigned to him**: The support rep can view those requests that are assigned to him/her only.
5. Enter the **description** for the role you are adding.
6. Click **Save**.

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

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

Edit Role

To edit an existing role

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

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

Delete Role

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

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

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

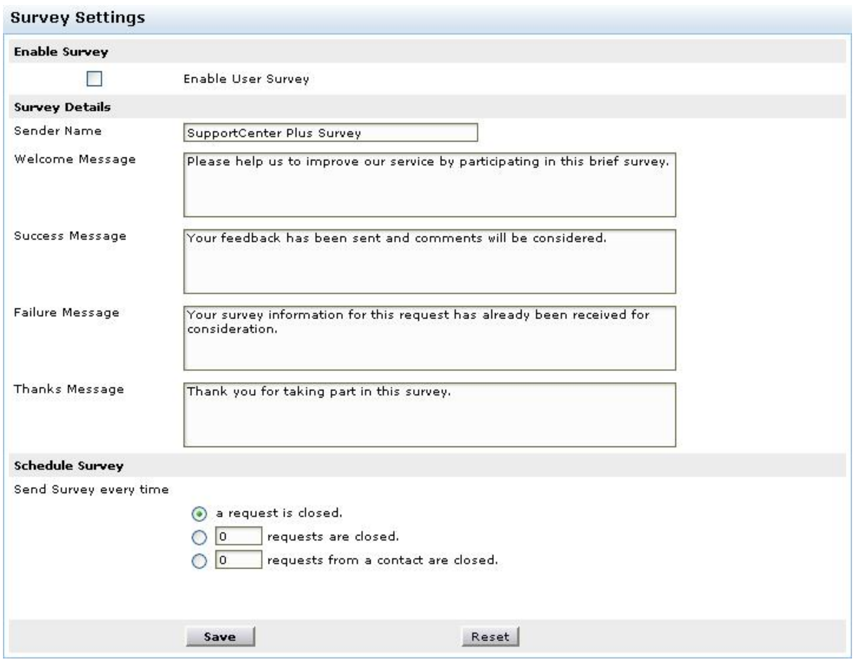
1. Log in to the SupportCenter Plus application using the **user name** and **password** of a SupportCenter Plus administrator.
2. Click the **Admin** tab in the header pane. The **User Survey** block is below the Users block.

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



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

Defining a Survey

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

To define your survey

1. Log in to the SupportCenter Plus application using the **user name** and **password** of a SupportCenter 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 support rep or the SupportCenter Plus administrator can manually send a survey to the contacts once the survey is closed.

To send the survey

1. Log in to SupportCenter Plus application using your **user name** and **password** or that of the SupportCenter 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 contact 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 support rep 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 contact completes the survey, the administrator and the contact who took the survey can view the survey results.

To view the survey results

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

Note:

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

Configuring Header Tabs

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

Reports

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

To view the various reports available in application

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

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

1. Custom Reports
2. Helpdesk Reports
3. Survey Reports

About SupportCenter Plus Reports

The SupportCenter Plus reports are classified under the following heads:

- Helpdesk Reports
- Survey Reports
- Custom Reports

Helpdesk Reports

Under Helpdesk reports, the reports are grouped as:

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

Pending Requests Report: This shows the distribution of all pending requests for a specific period of time, based on parameters, such as priority, support rep, category, due date, request created date. The reports available here are pending requests by category, pending requests by priority, pending requests by support rep, pending requests by due date, and pending requests by created date.

Completed Requests Reports: These reports show the distribution of completed and closed requests. Similar to the Pending Request Reports, these reports are also generated based on various parameters such as priority, request created date, due date, support rep, and category.

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

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

SLA Violation Reports - Completed Requests: These reports display the distribution of the requests that have violated the SLA that was applicable on them. You can view these violations based on the request category and the support rep who handled the request or view all the SLA violation reports.

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

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

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

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

Survey Reports

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

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

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

Survey Results by Support Reps has the survey information grouped based on individual support reps. 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 support reps. These points will enable you to objectively measure the support reps efficiency and effectiveness from the users perspective and take any corrective measures, if required.

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

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

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

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

Custom Reports

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

Reports

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

To view the various reports available in application

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

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

1. Custom Reports
2. Helpdesk Reports
3. Survey Reports

Custom Reports

SupportCenter 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 SupportCenter Plus application with the administrator user name and password.
2. Click **Reports** tab in the header pane.
3. Click **Create New Report** link available beside the **Custom Reports** sub-head in the reports home page. This opens the Custom Report Wizard that will help you navigate through the various steps involved in the creation of a custom report.
4. Choose the report type radio button. You can either create a tabular report or a matrix report.
5. Choose the module (Request / Inventory) for which you wish to create the report.
6. Click **Proceed to Report Wizard** button.

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

Generating Tabular Reports

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

Filter Options Step

1. If you are using the date / time filter criteria, select the required date column from the **Select Column** combo box.
2. Select the period for which you want to generate the report. If needed you can also provide a custom period by choosing the from and to date manually.
3. Click **Next**.

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

Finally, click **Next**.

Columns to Display Step

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

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

Grouping Data Step

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

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

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

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

Generating Matrix Reports

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

Filter Setting Step

1. If you are using the date / time filter criteria, select the required date column from the **Select Column** combo box.
2. Select the period for which you want to generate the report. If needed you can also provide a custom period by choosing the from and to date manually.
3. Click **Next**.

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

Finally, click **Next**.

Grouping Data Step

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

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

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

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

Delete Custom Reports

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

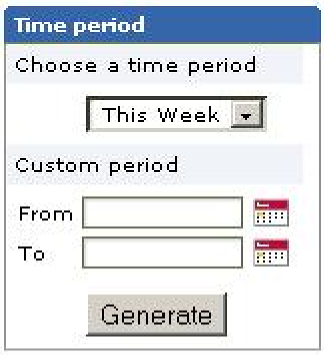
Viewing Helpdesk Reports

To view helpdesk reports

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

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

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



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

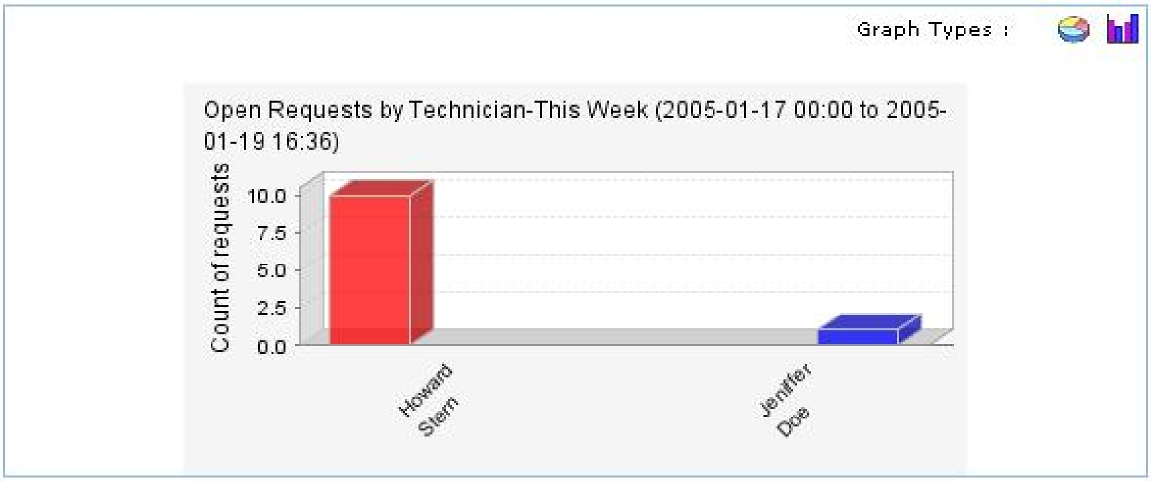
	Note: For the summary reports, you will not find the Ever Opened option in the time period combo box.

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

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

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

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



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

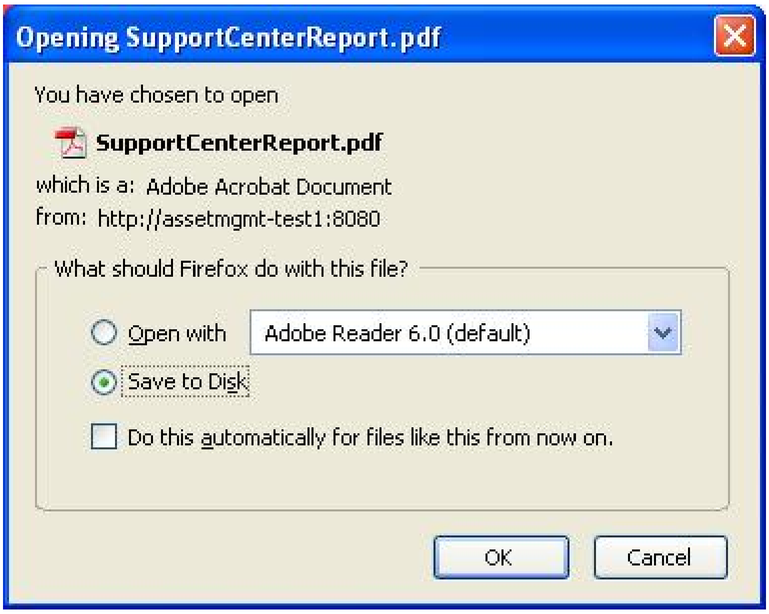
In case of the **time spent reports**, you can also select the requester / support rep / department / category for which you wish to generate the report, depending on the report type. This will give you the report for only the selected value.

Exporting Report as PDF

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

To export a report as PDF

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



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

General Features

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

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

Apart from these, support reps can also choose to change their status to IN/OUT based on their availability. In the support rep login, just below the **Log out** link, the IN - OUT button is available. Clicking it will toggle the status between IN and OUT. If the administrator provide view privilages for contacts to view the support reps IN-OUT status, then this is the status that will be visible for the contacts in their login. The **Tech Support** tab in the login home page, will give the availability status of all the support reps who are part of the helpdesk team.

Login Index Page

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

1. Dashboard that displays the request summary. In the contact login, the dashboard displays the number of open requests raised by them, closed requests raised by them, and all requests they have raised.
2. Tracking your tasks using the My Tasks section.
3. Add, Edit, or Delete Announcements that can be displayed for all users of SupportCenter Plus or only to the support reps.
4. Global view providing request related graphs and information.
5. License Expiry alert and prompt for registering SupportCenter Plus.

License Expiry Alert

Just below the header tabs the license expiry alert will be displayed. This provides details, such as the number of days the existing license is valid, the date by which the license has to be renewed, sales contact email ID, link to apply the upgraded license, and a combo box where you can set the number of days after which you want this reminder to be displayed. Once you choose the number of days from the combo box and click **OK**, the reminder will disappear and will again be displayed after the specified time frame.

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

To register SupportCenter 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 SupportCenter Plus.

Dashboard

SupportCenter Plus login home displays a dashboard with information on the request summary of the requests assigned to the user who has logged in. In the case of contacts, the dashboard displays information regarding the requests that have been raised by them. For more information on the contact login home dashboard, refer to the **Self Service Portal** help.

In the support rep / administrator login of SupportCenter Plus, the dashboard displays the following information:

1. Number of overdue requests that are assigned to the user.
2. Number of requests that are due for that day.
3. Number of open requests that are assigned to him/her.

Clicking these links will open the corresponding list view.

Publishing Announcements

SupportCenter Plus allows you to publish announcements company wide or just to the support reps group. The announcement board is available in the login home just below the request dashboard. You can add, edit, and delete announcements. The new announcements are displayed in bold while the old announcements that have been viewed once, will be displayed in regular font.

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 SupportCenter Plus using the administrator / support rep 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 what 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 support reps and do not wish to expose it to your contacts, then select the check box **Show this announcement only to support reps**.
7. 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 SupportCenter Plus using the administrator / support rep 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 SupportCenter Plus using the administrator / support rep 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 SupportCenter Plus using the administrator / support rep 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 support reps alone, then in the contact login, the contacts 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 contacts.

Global View

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

The global view displays the following information:

1. Request Status by Support Rep table, which denotes the number of requests in various status assigned to each support rep.
2. A graph on request inbound for a specific time period.

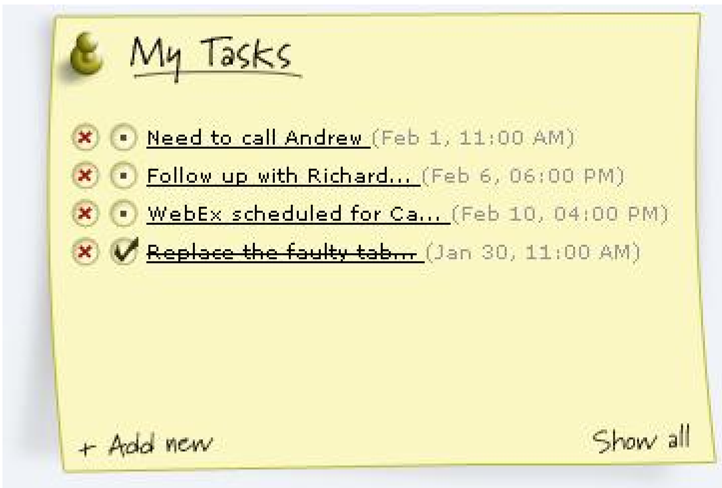
The above information provides the administrator an idea on what are the entities that require immediate action to be taken so as to avoid any SLA violations (requests) or contract expiry.

Tracking My Tasks

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

To add new tasks to your task list

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



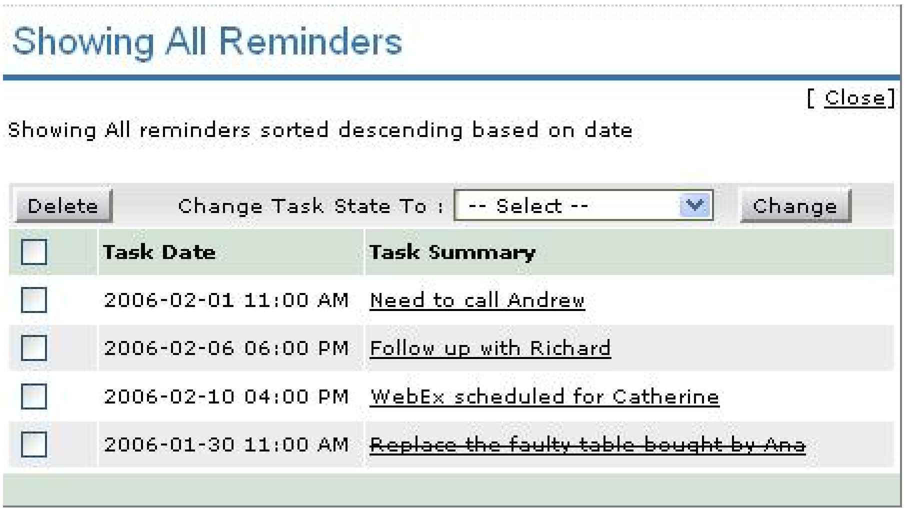
3. To change the **date**, click the calender icon beside the date field and choose the date of your choice.
4. From the time combo box, choose the time at which the task is scheduled. The values in the combo box are available in a gap of 30 min time interval.
5. Enter the **Task Summary**.
6. Click **Add**. The new task is added and is listed along with the already existing tasks in the ascending order based on date and time.

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

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

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

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



2. Select the check boxes beside the **Task Date** of the tasks for which you wish to change the state.
3. From **Change Task State To:** combo box, select **Completed**.
4. Click **Change**. The task state is changed in the **All Reminders** window. To view the changes in the SupportCenter Plus home page, refresh the page.
5. Click **Close** in the **All Reminders** window.

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

1. Click the hyperlinked task summary. An edit task form is opened.
2. Click the **Delete this Task** link available at the top left corner of the window.

You can also delete the tasks by following these steps:

1. Click **Show all** at the bottom right of the **My Tasks** note. All Reminders window opens.
2. Select the check boxes beside the **Task Date** of the tasks for which you wish to change the state.
3. Click **Delete**. The task is deleted from the **All Reminders** window. To view the changes in the SupportCenter Plus home page, refresh the page.
4. Click **Close** in the **All Reminders** window.

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

	Note: The **My Tasks** option is available for contacts accessing SupportCenter Plus through Self-Service Portal also and is dependent on the access privileges provided by the SupportCenter administrator.

System Log Viewer

You can view the error logs generated by the SupportCenter Plus application online.

To view the error logs

1. Log in to the SupportCenter Plus application using your user name and password. If you have the permissions to view the support information, you will see a **Support** tab in the header.
2. Click the **Support** tab in the header pane.
3. Click the **System Log Viewer** link available in the Support page.

To view the individual error details

1. In the **Error Log** list view page, click the hyperlinked **Error Message**. An error log window with the details of the error is opened.
2. The **Error Message** field contains the complete error message.
3. The **Module** field indicates the module in which the error occurred.
4. The **Occurred At** field indicates the date and time when the error occurred.
5. If the probable cause of the error is known, then the cause is displayed in the **Probable Cause** field.
6. The **Performed By** field indicates the origin of the error. For example, if it is a system-generated error, then the Performed By field contains System as its value.
7. Click **Close** after viewing the details of the error message.

None of these fields are editable. You can also search for a specific error log details with the help of the **Search in** feature.

To search for error logs

1. In the left menu, the search block is found at the bottom. If you are in the Error Log list view page, then by default, the **System Log** option is chosen in the **Search in** combo box. If not, then choose **System Log**.
2. In the **Enter Keyword** text field, enter the search string.
3. Press **Enter** on your keyboard or click **Go**. The search results will display all the error logs that match the search string.
4. Click the error log of your choice to view the same.

You can delete these error logs.

To delete individual error logs

1. In the **Error Log** list view, select check boxes beside the **Error Messages** that you wish to delete.
2. Click **Delete**.

If you want to delete all the existing error messages, then click the **Delete All** button.

Changing Password

Apart from the option of changing password from the user management configurations, you can also change your individual password by following these steps:

1. Log in to the SupportCenter Plus application using your user name and password.
2. Just above the tabs in the header pane, click the **Change Password** link beside the **Logout** link. The **Change Password** window is opened.

3. Your login name will be displayed. Enter your old password in the **Current Password** field.
4. Now enter your new password in the **New Password** field.
5. In the **Confirm New Password**, enter the new password again.
6. Click **Change Password**. A message that the new password is updated is displayed.
7. Click **Close**.

Recent Items

When you are using the ManageEngine SupportCenter Plus application, the application tracks your last viewed items and lists them in the **Recent Items** block on the left side. This has a list of the last 10 items that you viewed in the application, with the latest viewed item appearing on the top of the list. Clicking the hyperlinked item takes you directly to the item's details.

Back up and Restore

- In Windows
- In Linux

In Windows

Follow the steps given below to take a back up of the ManageEngine SupportCenter Plus data:

1. Click **Start -> Programs -> ManageEngine SupportCenter Plus 4 -> Backup Data**. A back up of the data and the file attachments that have been added to the application will be created.

The back up file will be created in the *<SupportCenter>\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 *<SupportCenter>\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 SupportCenter 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 SupportCenter Plus data:

1. Go to *<SupportCenter>/bin* directory.
2. Execute the **backUpData.sh** file as given below:

```
$ sh backUpData.sh
```

The back up file will be created in the *<SupportCenter>/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 *<SupportCenter>/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 SupportCenter 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 SupportCenter Plus server will be running:

1. Go to *<SupportCenter>\bin* directory.
2. Execute the file **changeWebServerPort.bat** at command prompt as shown below:

   ```
   changeWebServerPort.bat <new port number>
   ```

   The web server port will be reset to the new port number that you have specified.
3. If the port number is occupied, you will be prompted to enter a different port number. If you do not wish to enter a different port number then press **N** on your keyboard to exit the application. Else press **Y** and enter a different port number that is unoccupied.

This change will be effected only when you restart the server. To connect to the SupportCenter 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 SupportCenter Plus server will be running:

1. Go to *<SupportCenter>/bin* directory.
2. Execute the file **changeWebServerPort.sh** at command prompt as shown below:

   ```
   $ sh changeWebServerPort.sh <new port number>
   ```

   The web server port will be reset to the new port number that you have specified.
3. If the port number is occupied, you will be prompted to enter a different port number. If you do not wish to enter a different port number then press **N** on your keyboard to exit the application. Else press **Y** and enter a different port number that is unoccupied.

This change will be effected only when you restart the server. To connect to the SupportCenter Plus server after restarting, the new port number must be used.

Support Team Availability

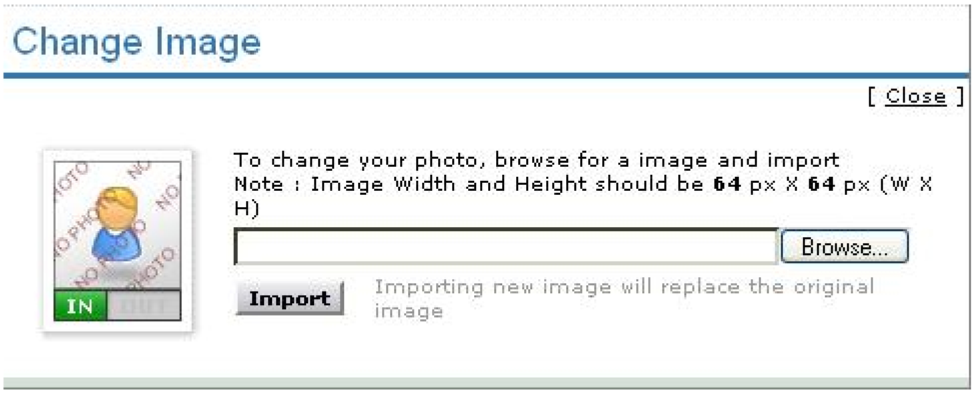
In SupportCenter Plus support reps can choose to change their status to IN/OUT based on their availability. In the support rep login, just below the **Log out** link, the **IN - OUT** button is available. Clicking this will toggle the status between IN and OUT. If the administrator provide view privilages for contacts to view the support reps IN-OUT status, then this is the status that will be visible for the contacts in their login. The **Support Team** tab in the login home page, will give the availability status of all the support reps who are part of the helpdesk team.

Alternatively, the support rep status can also be changed as below:

1. Login to the SupportCenter application using your user name and password or the administrator user name and password.
2. Click **Support Team** tab in the Login home dashboard.
3. Click the **IN-OUT** button available just below the support rep photo to toggle the status between IN and OUT.

You can also add/change the photo that is displayed beside your details. To change the display photo

1. Click **Change Image** link in your profile block. The Change Image dialog pops up.



2. Click the **Browse** button and choose the image file that you wish to display beside your profile.
3. Click **Import**.

The photo that you have chosen will be displayed in the photo block of your profile.