

ManageEngine ServiceDesk Plus
User Guide





# **Table of Contents**

INTRODUCTION	2
HOME PAGE	3
Announcements	7
Personalize & Change Password	8
Reminders	10
SERVICE CATALOG	12
Raising a Service Request	12
Edit the Service Request	15
REQUESTS	16
Request List View	17
Create an Incident	19
View Request Details	21
Reopen/Close Request	22
Print the Request	23
Add a Note	24
View Request Resolution	25
View Request Approvals	26
View Request History	27
View Requester Details	28
View All Replies	29
View Survey Results	30
View Requests based on Filters	31
Customize Request List view	33
Search for a Request	34

PROJECTS	35
Requesters as Project Members	35
Requester as Project Admin	36
Requester as Project Manager	47
Requester as Team Leader	57
Requester as Team Member	63
Frequently Asked Questions	67
MOBILE CLIENT	70
SOLUTIONS	76
Browse Solutions by Topic	77
Search for a Solution	78
MY DETAILS	80
EDIT MY DETAILS	81

# Introduction

ManageEngine ServiceDesk Plus is a comprehensive Help Desk and Asset Management software that provides help desk agents and IT managers an integrated console to monitor and maintain the assets and IT requests generated from the users of the IT resources in an organization. The IT help desk plays an important part in the provision of IT Services. It is very often the first contact the users have in their use of IT Services when something does not work as expected. The IT help desk is a single point of contact for end users who need help.

To make the process of reporting the issues to the IT help desk easier, ManageEngine ServiceDesk Plus provides you with a Self-Service Portal where you can search solutions for the most common issues before raising a request. Using the Portal you can log your complaints and issues online with the help of a web-based form. Once you have filed your issue, it gets listed in your request view page, where you can keep track of the logged issue. You can also update your personal information in Self-Service Portal.

When you login to the Self-Service Portal as a **Requester**, you will be able to access the following modules:

**Requests:** The Requests module allows you to create incident requests and service requests instantly, and keep track of the same. Also, you can view all the requests that you have raised till date for your reference.

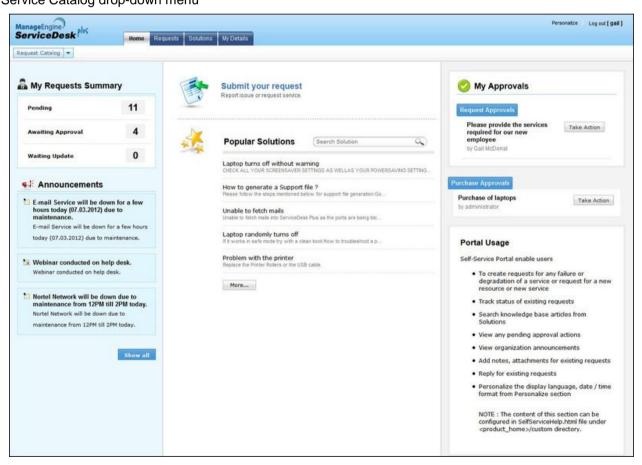
**Solutions:** The Knowledge Base module is developed and maintained by your IT help desk team. You can quickly search solutions for issues that you are currently facing before raising a request. If you do not find any solution for the problem at hand, then you can post your issue as a request to the help desk team.

**My Details:** My Details holds your personal details such as your Name, Department, Job Title and so on. You can modify this information and maintain it up-to-date with the latest changes.

# **Home Page**

When you successfully login as a **Requester**, you would view the Home Page. The **Home Page** in Self Service Portal has many useful information which enables you to take necessary actions. Based on the configurations enabled by the administrator, the following features are available on the home page,

- 1. My Requests Summary
- 2. Announcements
- Submit your request, OR
   Report an Incident/Create a New Service Request
- 4. Popular Solutions
- 5. My Approvals
- 6. Portal Usage
- 7. Personalize & Change Password
- 8. Quick Actions drop-down menu
- Request Catalog drop-down menu, OR Issue Catalog drop-down menu
   Service Catalog drop-down menu



## My Requests Summary

My Requests Summary displays the request summary list of the logged in requester. The request summary consists of Service and Incident requests. My summary block displays,

- Pending: Number of requests raised by you that is yet to be resolved.
- Awaiting Approval: Number of requests raised by you that are awaiting approval from the approver.
- Waiting Update: If you are selected as the Editor of any service requests, then the number
  of requests awaiting your update is listed.

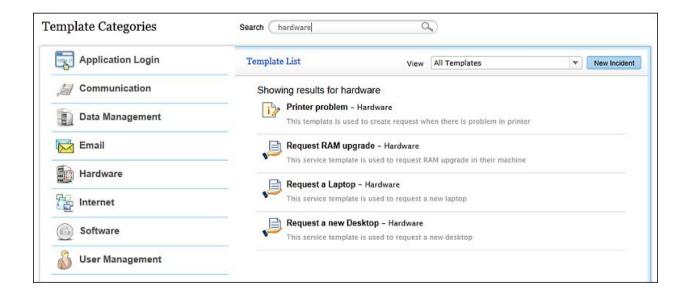
Clicking any of these links takes you to the Request List view of the selected option.

#### **Announcements**

Announcements published company-wide by your help desk support administrator is displayed under this block. Click the announcement link to view the announcement details. Refer Announcements to know more.

## Submit your request

You can report incidents and raise service requests using **Submit your request** link. Clicking the link takes you to **Template Categories** where the Incident and Service Templates are combined based on the category. You can filter your template view by selecting either **All Templates**, **Service Request Templates only** or **Incident Request Templates only**. You can also conduct a search for the desired template using the **Search** field.



To raise an Incident or Service Request, select the template link to access the add request form. Edit the fields if required and click **Add Request** button.

The **Submit your request** link is shown only when the administrator has enabled the option "Combine incident and service templates in requester login" in Self Service Portal Settings.

## Report an Incident/Create a New Service Request

The **Report an Incident** and **Create a New Service Request** link is shown only when the administrator has disabled the option "Combine incident and service templates in requester login" in Self Service Portal Settings.

Click **Report an Incident** link to raise an Incident Request. The Incident Templates are grouped according to the Category. You can also conduct a search for the desired template using the **Search** field. Select the template link to access the add request form. Edit the fields if required and click **Add Request** button.

Click **Create a New Service Request** to raise a Service Request. The Service Request Templates are grouped according to the Category. You can also conduct a search for the desired template using the **Search** field. Select the template link to access the add request form. Edit the fields if required and click **Add Request** button.

# **Popular Solutions**

**Popular Solutions** list the most common and frequently viewed solutions. You can also search for solutions by typing the keywords in the **Search** field. Select the solution link to view the solution details in the Solutions module.

### My Approvals

If you are provided with the permission to approve service requests or purchase orders, then the same appears under **My Approvals** block. Click **Take Action** button to approve or reject the request or purchase order.

### **Portal Usage**

The **Portal Usage** is editable and serves as an information block. You can provide information such as the shift timings of the technicians, contact information of your support team, and also provide links to internal and external websites. To edit the contents of the **Portal Usage** block, use the file **SelfServiceHelp.html** in ServiceDesk Plus installation directory.

# Personalize & Change Password

You can choose the display language, time zone, date and time format to be displayed in the application. In addition, you can also change your password to log into the application. Click Personalize link to know more.

### **Quick Actions drop-down menu**

The **Quick Actions** drop-down menu is shown only when the administrator has enabled the option to "Show Reminder(s) to the requesters" in the Self-Service Portal Settings. The Quick Actions drop-down menu lists the links to **Create New Incidents**, **View Archive Requests**, **Add New Reminders** and **View Reminders**. Click Reminders to know more about adding and viewing reminders.

## Request Catalog drop-down menu

The **Request Catalog** drop-down menu groups the Incident and Service Requests Templates based on the category.

The **Request Catalog** drop-down menu is made available to you only if the administrator has enabled the option "Combine incident and service templates in requester login" in Self Service Portal Settings.

# Issue Catalog drop-down menu

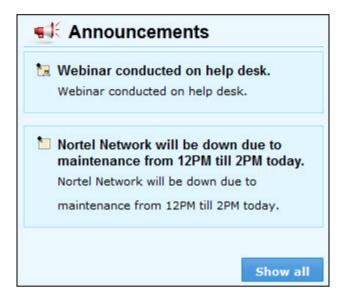
The **Issue Catalog** drop-down menu lists the Incident Templates that are made available to you. The Incident Templates are grouped according to the category. Select an incident template to access the new incident request form.

# Service Catalog drop-down menu

The **Service Catalog** drop-down menu lists the service items that are made available to you. The Service Request Templates are grouped according to the service categories. Click a service template to access the add request form.

# **Announcements**

The company wide announcements published by your help desk administrator are displayed in the announcements block of your login home page.



#### Representation of Icons:

- 1 Announcement made public i.e., announcements visible to requesters.
- Newly added announcements visible to requesters.
- 🔃 Public announcements visible to certain user groups.

Click the **Announcement Title** to view the announcement details. The details of the announcement open in a pop-up window. If there are more than one announcement, a **Previous** and **Next** button appears in the pop-up. Using these buttons, you can navigate through the announcements list and view all the announcements without closing the pop-up window.

Click **Show all** button to view the all the public announcements published by your help desk administrator. You can manage the **Announcements List** view by displaying **All Announcements**, the **Currently Showing Announcements** in the Home Page and the Announcements that are **Already Shown** in the Home Page.

# Personalize & Change Password

Personalize the **Display Language**, **Time Zone**, **Date/Time Format** and **Change your login password** using the Personalize link.

- 1. Click Personalize link beside the log out link.
- 2. The Personalize window pops up displaying the **Personalize** tab and **Change Password** tab. By default, the Personalize tab is displayed.



### Display Language

Select the language to be displayed in the application from **Choose Language** drop-down menu. For example, French, English and so on. All the data in the application will be displayed in the selected language.

#### Time Zone

Customize the time zone according to the site where the server is installed. The date and time will be set with respect to the time zone.

#### • Date Format and Time Format

Select the date format from Set Date Format drop-down menu. Similarly, set the time format from **Set Time Format** drop down box. The selected Date Format and Time Format will be displayed where ever the date and time is considered. For example, while creating a request, the date when the request was created and the due by date of the request will be displayed in the selected date and time format.

# **Change Password**

- 1. Click the Change Password tab.
- 2. Enter your old password in the **Current Password** field.
- 3. Next, enter your New Password.
- 4. Re-enter the new password in **Confirm New Password** field.
- 5. Click **Save**. Your login password has been changed and will be taken into effect when u log out and log into the application.

# Reminders

Reminders are substitute for those sticky notes or post-it notes which you use to remember your day-to-day tasks. The Reminders option is available under Quick Actions drop-down menu.

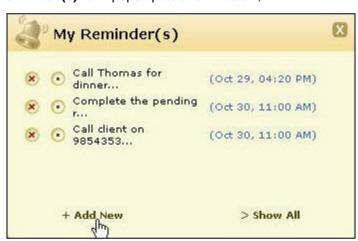
**NOTE:** The **Quick Actions drop-down menu** is available if the administrator has enabled the option under Self Service Portal Settings.

#### **Add Reminders**

To add new reminders to your reminder list,

1. Click **Quick Actions** drop-down menu and select **Add New** link under the **Reminders** block. The Reminders form opens in a pop up window.

Alternatively, you can add a new reminder while viewing the Reminders list. Click **Quick Actions** drop-down menu and select **My Reminder(s)** link to view your reminders list. The **My Reminder (s)** form pops up as shown below,

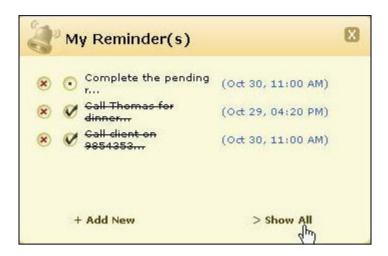


- 2. Click +Add New link. The Reminders form opens in a pop up window.
- 3. Enter the task summary in the text field provided.
- 4. Select the **Date & Time** for the reminder using the calendar icon . By default, the date field is set to the today's date and the time is set by default as 11:00 AM. You can change the date and time settings to your choice.
- 5. Click **Add** button. The reminder is added and is listed along with the existing reminders in an ascending order based on date and time.

### **Changing Status**

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

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



Alternatively, you can also change the task state by executing the following steps:

- 1. Click **Show all** at the bottom right of the **My Reminders** pop up. The **All Reminders List** view is displayed.
- 2. Select the check boxes beside the **Reminder Summary** for which you wish to change the state
- 3. Select the state from the **Change Reminder State To** combo box; select the reminder state to **Completed**.
- 4. Click **Change** button to change the status of the task. To indicate the change the task would be stroked off.

## **Deleting Reminders**

The reminders can be deleted by,

- 1. From the **My Reminders** pop up, click **Delete this reminder** radio button **≥** beside the reminder you want to delete. The reminder is deleted from the list.
- Alternatively, from All Reminders List view, enable the check box beside the Reminder summary to be deleted. Click Delete button. The confirmation message appears in a dialog box. Click OK to proceed. The reminder is deleted from the list.

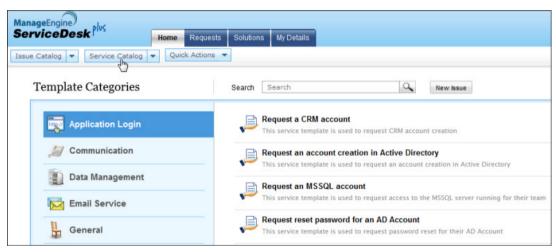
The advantage of moving the reminder to completed state instead of deleting it completely is that you can revert the state of the reminder to **Open** again and edit its attributes. But once you delete the reminder, it is completely removed from the application and cannot be retrieved.

# **Service Catalog**

The IT department have a wide range of services to offer to the IT users. These services are exposed to the users in the **Service Catalog** drop-down menu. The services proposed to the end-users are employee-centric with a request-oriented view of the service. The easy-to-use service catalog describes the services offered, and facilitates users to browse for services, submit requests for IT services and monitor their status.

Most of the basic day-to-day IT services required by the users are installation, relocation, internet access, email access, virus protection, provision of hardware and software, mail server and account management to name a few. With Service Catalog, services are easily accessed, evidently portrait and delivered consistently with high quality. Click **Service Catalog** drop-down menu to view the **Template Categories** and the **Template List**.

**NOTE:** If you find the **Request Catalog** drop-down menu instead of the Service Catalog drop-down menu, then click the Request Catalog drop-down menu to access both, service templates and issue templates.



The Service Catalog drop-down menu lists the services available in the catalog. The service items are grouped according to Service Categories and are available to users who are approved to access it. All you need to do is browse through the services, select a desired service item and raise a service request.

You can also conduct a search for the desired service item. Enter a keyword in the search field say, "software" and click enter.

# Raising a Service Request

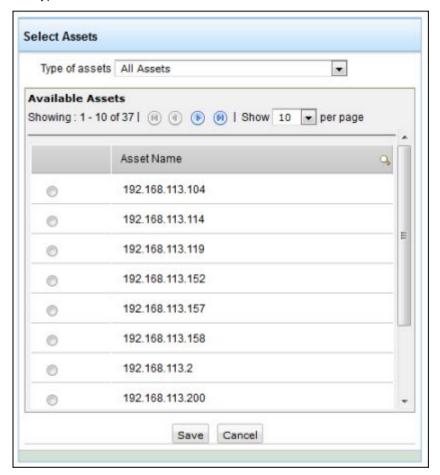
Raising a new service request is as simple as creating a new incident request from the available templates. Browse through the Template List and select a service that is relevant to your needs. Selecting a service from the list, takes you to the **New Service Request** form. The form is customized for end-user specific by the Service Manager.

In the service request form,

- 1. The logged in Requester Details such as **Name**, **Contact Number**, **Job Title** and **Description** are pre-filled automatically. These fields are non editable.
- The assets associated to the requester are populated in the Asset drop down. Select the
   Asset from the drop down. If you want to select an asset that is not associated to you, select
   the icon.

**NOTE:** The is available only if the Administrator has disabled the option to **show only the workstations associated to the requester** in Self Service Portal Settings.

In **Select Assets** pop-up window, you can filter the assets by selecting the **Type of assets** such as, access point, routers, workstation and so on, from the drop-down. Selecting All Assets from the drop-down menu lists all the assets available in the application, irrespective of the asset type.



- 3. The **Subject** and **Description** for the service request is pre-filled by the Service Manger.
- 4. By default, if the location of the requester is configured in the application, then the same is populated in the **Site** field.
- 5. If the editor field is enabled for the service request, then select the **Editor** from the icon 1. Refer the topic Editing Service Request to know the purpose of the editor and how to edit the service request.
- 6. Enter relevant values in remaining fields. If the fields are pre-filled with values, you can edit the same. Certain fields might not be editable.

#### ManageEngine ServiceDesk Plus - User Guide

- 7. If you are requesting for any resources, select the resources from the available list from the **Resource** Info block.
- 8. If required, you can Attach Files to the service request. To attach a file,
  - 1. Click Attach File button and browse through the files.
  - 2. Click **Open** in the File Upload pop-up.
  - 3. Click **Attach File** button. The file is attached to the service request with the file name and size. A delete icon is present to delete the file. Similarly, you can add another file but please note that the maximum size of the attachment is 10MB.
- 9. Click **Add New Request** to raise the request. Click **Reset** to reset the entered values. Click **Cancel** to take you to the request list view page.

# **Edit the Service Request**

Most of the service requests raised by the end users would require additional information before its processed and delivered by the IT Team. A user, mostly a requester, would be required to add this additional information for the service request. This user is called as the Editor. The Editor has permission to edit the service request and specify the required information.

If you are logged in to ServiceDesk Plus as the **Editor**, then the number of service requests that are awaiting your updated is shown in **Request Summary** -> **Waiting Update**. Clicking the numerical link takes you to the Request List view displaying all the requests that are **Waiting for my update**. By default, the status of these requests will be **On Hold**.

#### To edit a request,

- 1. Click the Subject link of the request to edit.
- 2. In the Request Details page, click the Edit button.
- 3. In the Edit form, specify the necessary details and click **Update Request** button.
- 4. The Request is updated and the status is moved to Open.

**NOTE:** The editor is allowed to edit the request only once. After editing a request, the Edit button will not appear when the status moves to Open.

# Requests

The Request module allows you to create incident requests and service requests instantly to your IT help desk team. You can view all the requests that you have raised till date and keep a track of its status.

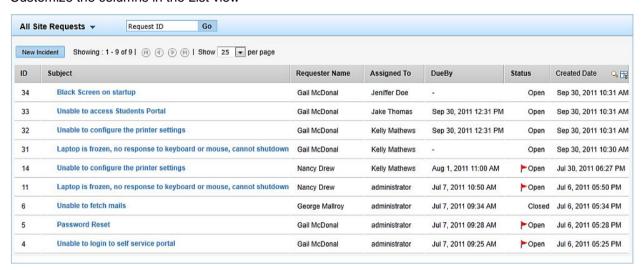
Apart from this, you can add additional information for a request in the form of **Notes**, **Print** only the required information and **View the Survey Results** for completed and closed requests.

# **Request List View**

The Request List view page organizes and displays all the tickets you have raised to the help desk team. Click **Requests** tab in the header pane. The page redirects to the request list view page.

In the Request List view, you have the facility to,

- · View requests (incident and service requests) based on default filters
- View Archived Requests
- Create Incident and Service Requests
- Search requests based on Request ID and column-wise search
- Customize the columns in the List view

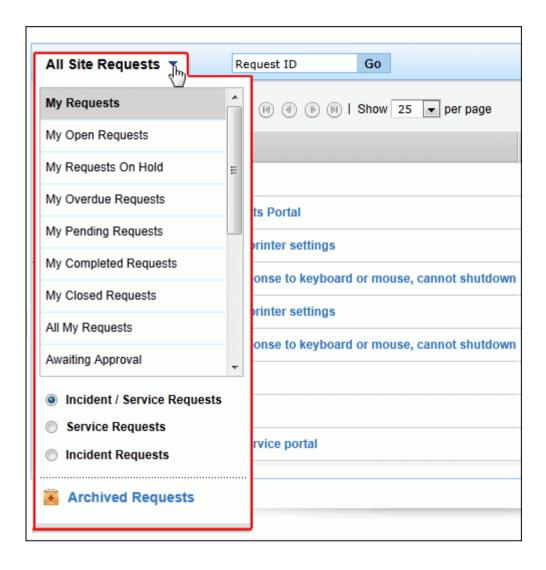


#### Representation of Icons in the list view:

- Orange indicates that the First Response time and Resolution time are overdue.
- indicates overdue requests.
- O- indicates First response time is overdue.
- Q perform column-wise search for requests.
- select columns to be displayed in the list view.

This page includes various useful functionalities such as,

Filter drop-down menu: The Filter drop-down menu consists of default filter list and options
to restrict the list view to display Service Requests, Incident Requests or both. Through the
filter, you can also access the Archive Requests.



- 2. **Searching Requests based on Request ID:** View the details of a request instantly by entering the Request ID and click **Go** button.
- 3. **Column-wise Search:** Perform column-wise search for specific Groups, Requesters, Departments, Sites and so on.
- 4. **New Incident:** Create new incident requests instantly using the **New Incident** button.
- 5. **Set the number of requests per page and navigation buttons:** You can set the number of requests to be displayed in the request list view page.
- 6. **Organizing the Request Order:** Sort the order of the requests. Click the column name link to sort requests in ascending or descending order.

# Create an Incident

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

To create a new incident using the web-based form

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

## **Requester Details**

In this block, your name and the workstation that has been associated with you are displayed. The Name, Contact number and Site is non-editable. From the Asset drop-down list, select the workstation to which the issue that you are submitting is related. Depending on the configurations set by the ServiceDesk Plus administrator, the workstation list will have all the available workstation in your organization or it may have only the workstations that are associated with you. Select the Type of assets from the drop down such as, access point, routers, workstation and so on. Selecting All Assets, lists all the assets available in the application, irrespective of the asset type. You can further filter the assets according to sites using the Site drop down. Selecting a site lists the assets from that particular site. Selecting the workstation is not a mandatory requirement. Only if the issue is related to the workstation, you need to select it.

## **Classifying Category**

The **Category** drop-down box, lists the categories under which an incident can be classified. Select the relevant category to which your incident request can be grouped. Select the relevant **Sub-Category** from the combo box. Also select the relevant **Item** from the combo box.

### **Describe Incident Request**

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

#### Add Attachments to the Request

Below the **Description** text box, click the **Attach File** button. Click this. This opens an **Attach File** pop-up window.



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

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

#### **Additional Fields**

Any additional fields which the requesters can set can be viewed below the description text field. Enter relevant details in the field.

## **Modes of Creating an Incident Request**

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

- E-mail the request to the help desk team. This e-mail will automatically be changed to a new request in the ServiceDesk Plus application and any actions to be performed on the request will be immediately taken into notice.
- Call up the IT help desk agent and report an issue or explain the nature of your request. The help desk agent will manually feed in the details into the application through the web-based New Incident form available in the Request module.

# **View Request Details**

Follow the steps given below to view a request available in the ServiceDesk Plus Request module:

- 1. Click the **Requests** tab in the header pane. The next page lists all the requests raised by you in the ServiceDesk Plus application. If there are any requests that have not been assigned any technician then they will appear in **bold** font.
- 2. Click the **Subject** link of the request that you want to view. The **Request details** page is displayed.
- 3. The request header has the Request ID, the Subject of the request, its Status and Priority. The Request tab consists of the Requester name, Created Date, Due Date, Request summary and Request Description. If there is a conversation thread, then the same can be viewed under Request Conversations. Below this, the details of the request such as the mode, request type, assigned technician and group, and so on are displayed. You can also view the details of the requester from the Requester Details block. If there are any attachments to request, click the file that is attached to view the same.
- 4. Click the **Resolution** tab to view the resolution for the request.
- 5. To view the history of the request, click the **History** tab.
- 6. To view all the replies that have been sent to you, click the **Conversations** button. All the notifications will be listed in the ascending order of the date and time when they were sent.

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

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

# Reopen/Close Request

ServiceDesk Plus provides you the privilege to reopen or close your requests from the Self Service Portal. When the technician moves the status of your request to Resolved, a **Close** button is displayed in the request details page. And, when the technician moves the status of your request to Closed or Resolved, a **Reopen** button is displayed in the request details page.

**NOTE:** The Reopen and Close buttons are made available to requesters only if the administrator has enabled these options in the Self Service Portal Settings.

### Close a Request

You can close requests when the technician has moved the request status to Resolved. To close resolved requests,

- 1. Click the **Requests** tab in the header pane.
- 2. Click the **Subject** link of the request that you want to close.
- 3. In the Request details page, click the Close button. A Close Request dialog box appears.
- 4. Enter relevant Comments for closing the request.
- 5. Click **Close** button. The status of the request is moved to Closed. If you do not want to close the request, then click **Cancel** in Close Request dialog box.

## Reopen a Request

You can reopen requests when the status of the request is moved to Closed or Resolved. To reopen requests,

- 1. Click the Requests tab in the header pane.
- 2. Click the **Subject** link of the request that you want to reopen.
- 3. In the Request details page, click the Reopen button. The Reply window is displayed.
- 4. The Subject field, by default, displays the request title. You can enter your comments in the **Description** field.
- 5. You can also attach relevant files along with this mail.
- 6. Click **Add** button. The Reply is appended as a Conversation and the status of the request is moved to **Open**.

# **Print the Request**

You can print the details of a request from the Request details page. ServiceDesk Plus also gives you an option to print only the required information.

To print a request,

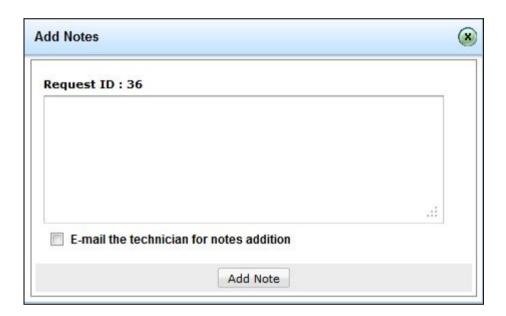
- 1. Click the Requests tab in the header pane.
- 2. Click the Subject link of the request that you want to print.
- 3. Click **Actions** drop-down menu and select **Print Preview** link. The Print Preview of the request opens in a pop-up window.
- 4. You can customize the required information that you want to print by select the check box beside the fields.
- 5. Click Print button.
- 6. The default printer associated with your workstation is invoked. Set the required options and click **OK**. You can collect the printed copy of the request at the printer that is linked to your workstation.

# Add a Note

After posting a request, if you want to add additional information about the request, then you can it in the form of Notes.

To add a note to a request,

- 1. Click the Requests tab in the header pane.
- 2. Click the Subject link of the request to which you would like to add a note.
- 3. In the Request details page, click Actions drop-down menu. Select Add Notes link. The **Add Notes** opens in a popup.



- 4. Enter your content in the text box below the **Request ID**.
- 5. You can notify the technician in-charge of your request about the addition of the note by selecting **E-mail the technician for notes addition** check box.
- 6. Click **Add Note** button. The note is added at the bottom of the request along with the date and time.

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

**NOTE:** You will not be able to delete any of the notes in a request even though you have added them.

# **View Request Resolution**

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

- 1. Click the **Requests** tab in the header pane.
- 2. Click the **Subject** link of the request for which you want to know the resolution.
- 3. In the View Request page, click the Resolution tab in the center pane.
- 4. The request header is retained as is from the request view. Just below that you will find the resolution for the request, if it had been added by the technician who attended to the request. Or else, a message stating that *No Resolution Available* is displayed. The resolution has information of who created it, creation date and time, resolution title, and detailed description.

# **View Request Approvals**

If the administrator has enabled the option **Show the Approval Tab to requester** in the Self-Service Portal Settings, then you can view the **Approvals tab** when the request is submitted for approval.

The Approvals tab lets you keep a track of the progress and status of your requests, once it's submitted for approval. The Approvals tab shows information such as the approver's e-mail address, the date when the request was submitted for approval, the status of the request (whether the request is approved, pending approval or denied), the date when the concerned authority recorded their decision and the comments provided by them.

**NOTE:** The Approvals tab is shown to requester who has initiated the request and to the requester who can approve requests. The Approvals tab is shown for both, Incident and Service Requests.

To access the Approvals tab,

- 1. Click the **Requests** tab in the header pane.
- 2. Click the **Subject** link of the request for which you want to view the approvers.
- In the View Request page, click the Approvals tab in the center pane. You will find the list of approvers for the request. For Service Requests, the multi-level approval details will be displayed.

# **View Request History**

The various actions performed on a request can be viewed in the History tab. This is essential for future reference and audit purpose.

To view the request history,

- 1. Click the Requests tab in the header pane.
- 2. Click the **Subject** link of the request for which you want to view the history.
- 3. In the **Request** details page, click the **History** tab. This displays the complete history of actions that were performed on the request from the time of its creation.

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.

# **View Requester Details**

Apart from viewing your details in **My Details** tab, you can view the details of the requesters from your Department or Site. You can view the details of the requester such as the Requesters Name, Employee ID, Department and Site to which the requester belongs, Designation, E-mail ID, Phone and Mobile number of the requester.

**NOTE:** You can view details of other requesters only if you have the permission to view the requests raised for your Department or Site.

To view Requester details,

- 1. Click the Requests tab in the header pane.
- 2. Click the Subject link of the request.
- 3. Click the **Requester Name** link in the **Requester Details** block. The Requester details open in a popup window.



4. **Close** the window on viewing the details.

# **View All Replies**

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

- 1. Click the Requests tab in the header pane.
- 2. Click the **Subject** link of the request to view the conversations.
- 3. In the **Request** details page, the various mails between you and the technician in-charge will be displayed under the head **Conversations**.

# **View Survey Results**

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

To view the survey results,

- 1. Click the **Requests** tab in the header pane.
- 2. In the Requests List view select the My Closed Requests filter.
- 3. Click the Subject link for which you want to view the survey results.
- 4. Click **View Survey Results** link under the Actions drop-down menu. The survey results open in a popup window.
- 5. Once you have viewed the results, click the **Close** button.

#### NOTE:

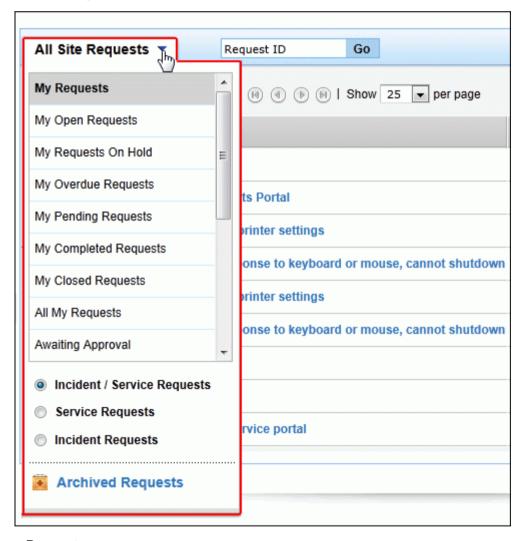
- 1. The View Survey Results link would appear only if you had taken the survey.
- 2. Once the survey is submitted, the response cannot be changed.

# View Requests based on Filters

You can view requests based on default filters and also restrict the list view to display only **Service Requests**, **Incident Requests** or both **Service and Incident Requests**. You can also view the list of your archived requests by clicking **Archived Requests** link

To view requests based on filters,

- 1. Click the **Requests** tab in the header pane.
- 2. Select the Filter drop-down menu to view the default filters.



# • My Open Requests

This is the default status on opening the request list view page. All your open requests will be listed under this option.

#### My Requests On Hold

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

#### • My Overdue Requests

All your assigned requests that have exceeded the due date are listed under this option.

#### • My Pending Requests

All your assigned unfinished requests are listed under this option.

#### • My Completed Requests

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

#### • My Closed Requests

All your requests with the status as closed will be listed under this option.

#### All My Requests

All your requests irrespective of the status will be listed under this option.

#### Awaiting Approval

All your requests that are awaiting approval from the concern authority are listed under this option.

#### · Waiting for my update

If you are assigned as the Intermediate Editor for any service requests, then the service requests that are waiting for your update is listed under this option.

#### Updated by me

If you are assigned as the Intermediate Editor for service requests, then the requests updated by you are listed under this option.

If you have the permission to view requests raised from your Department or Site, then the following filters will be available to you.

#### • Site Open Requests

All the open requests raised from your site are listed under this option.

### • Site Requests On Hold

All the assigned requests raised from your site that are on hold is listed under this option.

## Site Closed Requests

All the requests raised from your site that are closed is listed under this option.

#### • Site Completed Requests

All the requests raised from your site that are completed is listed under this option.

#### • All Site Requests

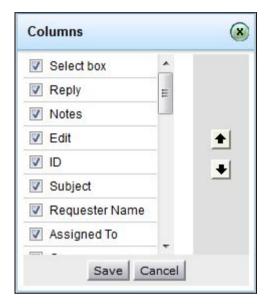
All requests raised from your site is listed under this option.

# **Customize Request List view**

You can customize to display the columns of your choice in the Request List view.

To customize the columns in the list view,

- 1. Click the Requests tab in the header pane.
- 2. 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.



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

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

# Search for a Request

You can search for your requests using Column-wise Search.

To perform a column-wise search

- 1. Click **Requests** tab in the header pane.
- 2. 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.
- 3. Enter the search key in field under the column of your choice.
- 4. 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.

# **Projects**

# **Requesters as Project Members**

Before going into details regarding projects let us view the roles you might occupy as Requesters in Projects along with the rights you'll be entitled to.

Based on the role assigned by the administrator a requester can be anyone of the following:

Role	Works On	Access Permissions	Restrictions	If You Fall Under The Category
Project Admin	All projects available in the module	Can Do Everything Can Add/Edit/Delete Projects Can Add Members Can Assign Roles to Members And more	No Restraint	Project Admin click here
Project Manager	One or more projects	Can Edit Assigned Projects Can Add project members Can Add Milestones, Tasks & establish relationship between them	Cannot Add/Delete Projects  Cannot view all the projects available in the module	Project Manager click here
Team Leader	Assigned Milestones	Can Edit/Work on Milestones Can Add/Delete Tasks to Milestones Can Reassign Tasks Can Establish relationship between Tasks and organize them	Cannot Add/Delete Projects Cannot Add/Delete Milestones Cannot Add Project Members	Team Leader Click here
Team Member	Assigned Tasks	Can Edit/Work On Tasks	Cannot Add/Delete Milestones Cannot Add/Delete Tasks to Milestones Cannot Establish relationship between Tasks Cannot Add/Delete Projects	Team Member click here

**Note:** Project members cannot be assigned to two different roles in the same project; but they can play different roles in different projects.

# Requester as Project Admin

- · Creating/Scheduling/Editing Projects
- Adding Project Members
- Implementing your Projects
  - Configuring Milestones
  - · Adding Tasks to Milestones
  - Establishing Task Dependency
- Gantt Chart (and its different views)
- Project Screenshot

# Creating, Scheduling and Editing Projects:

There are two ways to accessing a New Project Form in ServiceDesk Plus application,

- a. Quick Actions drop down
- b. Projects Tab

### a. Quick Actions drop-down menu

The Quick Actions drop-down menu is a quick navigator to instantly access the New Project form. Click **Quick Actions drop-down menu** -> **Project** under Create New block.

### b. Projects Tab

- 1. Click the **Projects** tab in the header pane.
- Click the New Project button to open the New Project form. (Use 'Add New Link' while creating first Project)
- 3. Specify the Project Title, Description and Code
- 4. Select the **Project Type, Status** and **Priority** from the drop down list.
- 5. Specify Project Schedule Start and Schedule End date

### Adding more details to the Project:

To evaluate Project against the projected plan, you are provided with the following additional fields:

- 1. Actual Start Date and Actual End Date (for recording real-time project completion date).
- 2. **Projected On Date** (the date on which the project is projected; the difference between this date and the scheduled end date tells you whether the project is ahead, delayed or on time.)
- 3. **Estimated Hours** and **Actual Hours** (fields recording 'planned and real-time' time taken for the Project).

- 4. **Estimated Cost** and **Actual Cost** (fields recording 'planned and real-time' expenditure towards the Project).
- 5. For adding attachments to the Project, click Attach file button in the project's pane.

# **Scheduling Projects:**

Project Scheduling not only helps you schedule the project but also determine whether the project is **'on-schedule'**, **'delayed' or 'ahead'** by comparing it against real-time completion.

To schedule the project do the following:

- 1. Configure the Scheduled Start and Scheduled End Date
- 2. Fill in the Actual Start and Actual End Date (upon project completion)
- 3. Fill in the **Projected Date**, based on these dates, the project could be:
  - o **On Schedule** if the Scheduled Date and Actual Date are the same.
  - Delayed if the Project (Actual Date) has past the Scheduled Date. (no of days by which project is delayed gets displayed on the project list view page)
  - Ahead if the Project (Actual Date) is completed before the Scheduled Date. (no of days by which project is ahead gets displayed on the project list view page)



# **Editing Projects**

- Select the Project in the Project List View page and click on **Edit Icon** in the Project pane.
- Implement the necessary changes and click on Update Project

# **Deleting Projects**

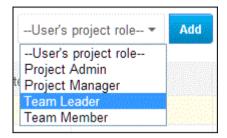
Project can be deleted in two ways:

- **a. Bulk Delete:** From **Project List View**, select Project(s) to be deleted, and click on **Delete Icon**.
- **b. Single Delete: Enter the Project** to be deleted by clicking on Project Title and click on **Delete Icon**

### Adding Project Member(s)

- Click on 'Members' tab. Select 'Add Members' link
- Available Technicians'/Users' List already configured in ServiceDesk Plus would be displayed.

- Select Project Member(s) (from the available Technician list (OR) add Technicians of your choice).
- Select **Project Role** from Project Role drop-down and click on ADD button.



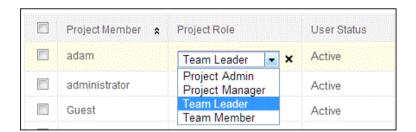
# **Changing Project Member Roles**

However well-planned your project might be things are bound to go off-course when there are innumerable Tasks to be executed. To ensure **project admin/managers** are ready enough to face such incidents **they are allowed to 'change project member role'** as and when required.

This feature is predominantly used to ensure grey areas of the project get enough attention. That is, let's say a project member has completed his part and is free, yet the project is progressing at a rather slow rate, then this member could be assigned some other role that might help speed up the project.

Speeding up the Project is not the sole objective, you can also use this option just to Change Project Member Role, if such a need arises. To do so,

- Click on Members tab
- Click on 'Project Role Drop Down' (of the respective member whose role is to be changed)
- From Project Role drop-down, select the role to be assigned



#### Note

- 1. At any time during the project it is **possible to change** a project member's role
- 2. During role change the access permissions of the respective member would be changed, as he would be either provided or stripped of certain rights in the project. <to know about roles & their access permissions, refer Table>

# **Changing Project Member Status**

While creating a Project a number of unforeseen events that might occur should be taken into account. For example: a member falling sick, a member deciding to quit, or a member requesting a role change and so on.

Such project members can be kept in the bench by changing their status to **Inactive**. Milestones and Tasks associated with inactive members can be assigned to other project members. Inactive project members can be reinstated by change their status to active.

- Click on 'Members' tab
- Click on 'User Status' to be changed
- Select Inactive to keep Project Member in the bench
- Select Active to reinstate Project Member

**Note:** At a given time, only one role can be assigned to a project member.



# **Deleting Project Member(s)**

Project Members can be deleted in two ways:

- **a. Bulk Delete:** From Member List View, select Project Members to be deleted, and click on **Delete Icon.**
- b. Single Delete: Select Project Member to be deleted and click on Delete Icon

### Implementing your Projects

Configuring milestones, adding tasks and establishing dependency between tasks form the core of project creation. In this section you look at how these things are done:

### **Creating Milestones:**

- 1. Click on Milestones tab in the Projects pane.
- Click the Add New Button to open the New Milestone form. (Use 'Add New Link' while creating first Milestone)
- 3. Specify the Milestone Title and Milestone Description.
- 4. Select the **Status** and **Priority** from the drop down.
- 5. Specify Project Schedule Start and Schedule End date

### Adding more details to Milestone::

- 1. Actual Start Date and Actual End Date (for recording real-time milestone completion date).
- 2. **Projected On Date** (the date on which the project is projected; the difference between this date and the scheduled end date tells you whether the project is ahead, delayed or on time.)
- 3. **Estimated Hours** and **Actual Hours** (fields recording 'planned and real-time' time taken for the milestone).
- 4. **Estimated Cost** and **Actual Cost** (fields recording 'planned and real-time' expenditure towards the milestone).
- 5. For adding attachments to the Milestone, click Attach file button in the milestone's pane.

# **Scheduling Milestones**

Milestone Scheduling not only helps you schedule the milestone but also determine whether the milestone is **'on-schedule'**, **'delayed'** or **'ahead'** by comparing it against real-time completion.

To schedule the milestone do the following:

- 1. Configure the Scheduled Start and Scheduled End Date
- 2. Fill in the Actual Start and Actual End Date (upon project completion)
- 3. Fill in the Projected On date; based on these dates, the milestone would be considered:
  - o **On Schedule** if the Scheduled Date **and** Actual Date are the same.
  - Delayed if the Project (Actual Date) has past the Scheduled Date. (no of days by which project is delayed gets displayed on the project list view page)
  - Ahead if the Project (Actual Date) is completed before the Scheduled Date. (no of days by which project is ahead gets displayed on the project list view page)



### **Editing Milestones**

- Select the Milestone from the Milestone List View page and click on Edit Icon in the Milestone pane.
- Implement the necessary changes and click on Update Milestone

### **Deleting Milestones**

Milestones can be deleted in two ways:

- **a. Bulk Delete:** From Milestone List View, select Milestone to be deleted, and click on Delete Icon.
- **b. Single Delete:** Enter the Milestone to be deleted by clicking on Milestone and click on **Delete Icon**

# **Configuring Tasks:**

- 1. Click **Tasks** tab in the header pane.
- 2. Click **Add New Button** to open the **New Task form.** (Use **'Add New Link'** while creating first Task)
- 3. Specify Task Title and Task Description.
- 4. Select Status and Priority from the drop down.
- 5. Specify Task Scheduled Start and Scheduled End date

### Adding more details to Task(s):

To indicate Task's progress and to discuss about ways of bettering it, you are provided with the following fields:

- 1. **% of completion** that helps denote the extent to which the task has been completed (any value between 1 100)
- 2. **Comments** that lets project members communicate between themselves about the task as well as the project
- 3. Additional Cost, if any, can be recorded in this field.

# **Scheduling Tasks:**

Task Scheduling not only helps you schedule the task but also determine whether the task is 'on-schedule', 'delayed' or 'ahead' by comparing it against real-time completion.

To schedule the task do the following:

- 1. Configure the Scheduled Start and Scheduled End Date
- 2. Fill in the Actual Start and Actual End Date (upon project completion)
- 3. Based on Scheduled/Actual Dates, task would be considered:
  - o On Schedule if the Scheduled Date and Actual Date are the same.
  - Delayed if the Task (Actual Date) has past the Scheduled Date. (no of days by which project is delayed gets displayed on the project list view page)
  - Ahead if the Task (Actual Date) is completed before the Scheduled Date. (no of days by which project is ahead gets displayed on the project list view page)



# **Editing/Deleting Tasks:**

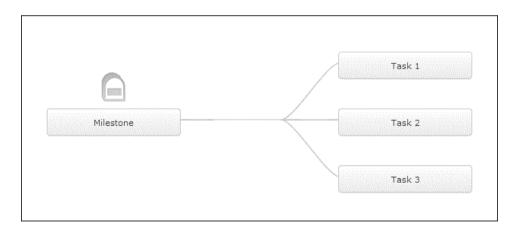
- Select the **Milestone** from the **Milestone List View** page and click on **Edit Icon** in the **Milestone** pane.
- Implement the necessary changes and click on Update Milestone
- Bulk Delete: From Milestone List View, select Milestone to be deleted, and click on Delete Icon
- Single Delete: Enter the Task to be deleted by clicking on Task Title and click on Delete
   Icon in the project's pane.

# **Configuring Task Dependency**

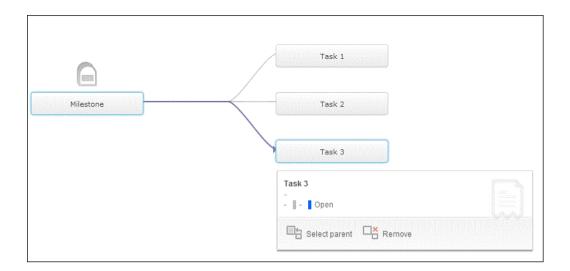
Projects contain innumerable tasks which in some way would be connected to each other since they are working in unison towards the same goal. To clearly define such relationships between tasks and to distinguish parent tasks from child tasks you are presented with the option of configuring task dependencies.

To configure **task dependency**, click on **Dependencies button** and follows the steps mentioned below:

- 1. Select Tasks tab
- 2. Click **Dependencies** button
- 3. Dependency Chart displays all available Tasks



- 4. To configure Task Dependency, move mouse over a Task
- 5. Mouse Hover opens up Task Dependency Dialog box
- 6. Task Dependency Dialog box has two options: Select Parent & Remove buttons



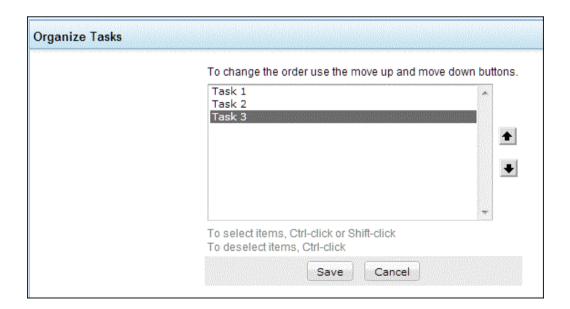
- 7. Click on Select Parent button. All Tasks present would be highlighted from which the Parent Task can be chosen
- 8. Click Remove button to remove/reconfigure the established relationship

# **Configuring Task Order**

Task dependency helps decide which task depends on what thus giving a structure to the project. But still it does not give a definite structue in the sense it does not decide the order in which these tasks would be executed. **Task organization/ordering** is very essential for a project's success and this can be **brought about by clicking** on **Organize button**.

To organize tasks follow the steps mentioned below:

- 1. Select Tasks tab
- 2. Click Organize button. The Organize Tasks pane opens up.



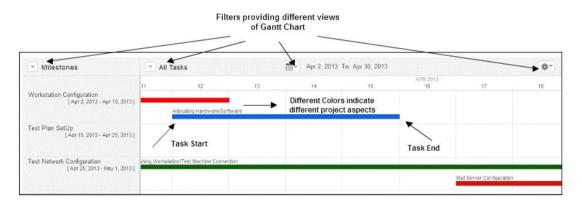
- 3. To reorganize a Task, Ctrl + Click (or) Shift + Click on the Task
- 4. Use 'Move Up' and 'Move Down' buttons to change Task's position
- 5. Click on 'Save'
- 6. To de-select a Task, click Ctrl + Click

#### What is Gantt Chart?

Gantt Chart is a bar chart that illustrates a project schedule. This chart also illustrates project elements - along with their schedule against the project calendar - and summarizes the entire project using the chart. It presents a clear picture of the different phases of the project and also of the various activities that occur in the project's work breakdown structure (WBS).

### Advantages:

- Provides bird's eye view of a project and also serves as a one stop solution for accessing the
  entire project module with all it projects (provided, the technician is assigned with Project
  Admin role).
- Effective Resource Management as project constraints like time, manpower and amount of work remaining can be viewed and regulated as per situation demands.
- Rescheduling of Milestones/Tasks and project member role change, if such a need arises, can also done via Gantt Chart.



### **Viewing and Configuring Gantt View:**

- 1. Click on Gantt View Tab
- 2. Gantt Chart with its default view will get displayed.
- 3. Configure Gantt Chart as per your requirement using
  - **a. Gantt Row Type Filter:** Available options are Members, Milestones and Tasks.
  - **b. Gantt Column Type Filter**: Available options are Tasks (Open, Closed and All) & Milestones (Open, Closed and All)
  - c. Project Calendar Filter: Available options are Hours, Day and Month &
  - d. More Settings Filter: Available options are Priority, Task Types and Status
- 4. Gantt Chart would be modified based on your requirements.

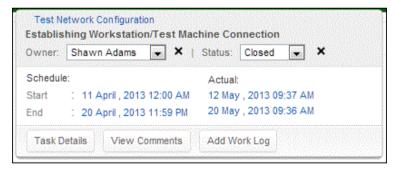


# **Accessing Projects via Gantt Box:**

Gantt Box that appears on mouse over a "milestone/task" serves as a window through which the "milestone/task" can be accessed and edited according to the changes taking place within a project. An entire project can be accessed through Gantt Box if the project member has the rights to do so. This quick access enhances the effectiveness of Gantt Chart and is very useful in supervising the project.

Using Gantt Box the following can be done:

- 1. Rescheduling of Milestones (or) Tasks and Changing of Milestone/Task details
- 2. Reassigning of Milestones/Tasks to Project Members
- 3. Changing of Milestone/Task Status
- 4. Adding Worklogs and Comments



### **Gantt View Tab and Gantt View Across All Projects Button:**

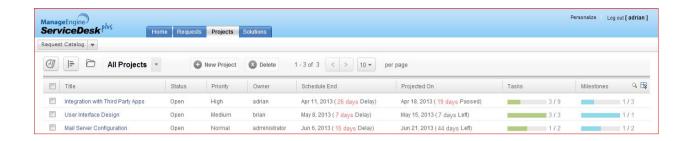
Gantt Chart can be accessed in two different ways:

- By clicking on "Gantt View" Tab (in the project's pane) (or) by clicking on "Gantt View

  Across All Projects Button"
- As the name suggests, the latter presents the gantt view of all projects present in projects module
- Gantt View Across All Projects Button present in the projects list view page is useful for project administrators
- Using this button gantt chart can not only be filtered based on milestones and tasks but also based on project names and project status.

### ManageEngine ServiceDesk Plus - User Guide

**Note:** Projects can be associated with Change using 'Associate Change' option (available under Actions button)



**Project Screenshot** 

# Requester as Project Manager

- Creating/Scheduling/Editing Projects
- Adding Project Members
- Implementing your Projects
  - Configuring Milestones
  - · Adding Tasks to Milestones
  - Establishing Task Dependency
- Gantt Chart (and its different views)
- Project Screenshot

# **Creating, Scheduling and Editing Projects:**

There are two ways to accessing a New Project Form in ServiceDesk Plus application,

- a. Quick Actions drop down
- b. Projects Tab

#### a. Quick Actions drop-down menu

The Quick Actions drop-down menu is a quick navigator to instantly access the New Project form. Click **Quick Actions drop-down menu** -> **Project** under Create New block.

### b. Projects Tab

- 1. Click the **Projects** tab in the header pane.
- Click the New Project button to open the New Project form. (Use 'Add New Link' while creating first Project)
- 3. Specify the Project Title, Description and Code
- 4. Select the Project Type, Status and Priority from the drop down list.
- 5. Specify Project Schedule Start and Schedule End date

### Adding more details to the Project:

To evaluate Project against the projected plan, you are provided with the following additional fields:

- 1. Actual Start Date and Actual End Date (for recording real-time project completion date).
- 2. **Projected On Date** (the date on which the project is projected; the difference between this date and the scheduled end date tells you whether the project is ahead, delayed or on time.)
- 3. **Estimated Hours** and **Actual Hours** (fields recording 'planned and real-time' time taken for the Project).
- 4. **Estimated Cost** and **Actual Cost** (fields recording 'planned and real-time' expenditure towards the Project).
- 5. For adding attachments to the Project, click Attach file button in the project's pane.

# **Scheduling Projects:**

Project Scheduling not only helps you schedule the project but also determine whether the project is **'on-schedule', 'delayed' or 'ahead'** by comparing it against real-time completion.

To schedule the project do the following:

- 1. Configure the Scheduled Start and Scheduled End Date
- 2. Fill in the Actual Start and Actual End Date (upon project completion)
- 3. Fill in the **Projected Date**; based on these dates the project could be:
  - o **On Schedule** if the Scheduled Date and Actual Date are the same.
  - Delayed if the Project (Actual Date) has past the Scheduled Date. (no of days by which project is delayed gets displayed on the project list view page)
  - Ahead if the Project (Actual Date) is completed before the Scheduled Date. (no of days by which project is ahead gets displayed on the project list view page)



# **Editing Projects**

- Select the Project in the Project List View page and click on **Edit Icon** in the Project pane.
- Implement the necessary changes and click on Update Project

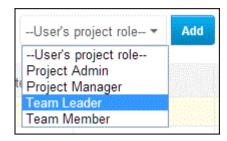
### **Deleting Projects**

Project can be deleted in two ways:

- **a. Bulk Delete:** From **Project List View**, select Project(s) to be deleted, and click on **Delete Icon**.
- **b. Single Delete: Enter the Project** to be deleted by clicking on Project Title and click on **Delete Icon**

### Adding Project Member(s)

- Click on 'Members' tab. Select 'Add Members' link
- Available Technicians'/Users' List already configured in ServiceDesk Plus would be displayed.
- **Select Project Member(s)** (from the available Technician list (OR) add Technicians of your choice).
- Select **Project Role** from Project Role drop-down and click on ADD button.



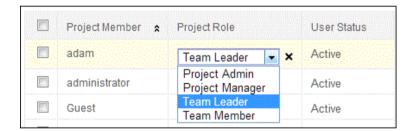
# **Changing Project Member Roles**

However well-planned your project might be things are bound to go off-course when there are innumerable Tasks to be executed. To ensure **project admin/managers** are ready enough to face such incidents **they are allowed to 'change project member role'** as and when required.

This feature is predominantly used to ensure grey areas of the project get enough attention. That is, let's say a project member has completed his part and is free, yet the project is progressing at a rather slow rate, then this member could be assigned some other role that might help speed up the project.

Speeding up the Project is not the sole objective, you can also use this option just to Change Project Member Role, if such a need arises.

- Click on Members tab
- Click on 'Project Role' of the member whose role is to be changed
- From Project Role drop-down, select the role to be assigned



### Note

- 1. At any time during the project it is **possible to change** a project member's role
- 2. During role change the access permissions of the respective member would be changed, as he would be either provided or stripped of certain rights in the project. <to know about roles & their access permissions, **refer Table**>

### **Changing Project Member Status**

While creating a Project a number of unforeseen events that might occur should be taken into account. For example: a member falling sick, a member deciding to quit, or a member requesting a role change and so on.

Such project members can be kept in the bench by changing their status to **Inactive**. Milestones and Tasks associated with inactive members can be assigned to other project members. Inactive project members can be reinstated by change their status to active.

- Click on 'Members' tab
- · Click on 'User Status' to be changed
- Select **Inactive** to keep Project Member in the bench
- Select Active to reinstate Project Member

Note: At a given time, only one role can be assigned to a project member.



# **Deleting Project Member(s)**

Project Members can be deleted in two ways:

- **a. Bulk Delete:** From Member List View, select Project Members to be deleted, and click on **Delete Icon.**
- b. Single Delete: Select Project Member to be deleted and click on Delete Icon

### Implementing your Projects

Configuring milestones, adding tasks and establishing dependency between tasks form the core of project creation. In this section you look at how these things are done:

# **Creating Milestones:**

- 1. Click on **Milestones** tab in the Projects pane.
- Click the Add New Button to open the New Milestone form. (Use 'Add New Link' while creating first Milestone)
- 3. Specify the Milestone Title and Milestone Description.
- 4. Select the **Status** and **Priority** from the drop down.
- 5. Specify Project Schedule Start and Schedule End date

# Adding more details to Milestone::

- 1. Actual Start Date and Actual End Date (for recording real-time milestone completion date).
- 2. **Projected On Date** (the date on which the project is projected; the difference between this date and the scheduled end date tells you whether the project is ahead, delayed or on time.)
- 3. **Estimated Hours** and **Actual Hours** (fields recording 'planned and real-time' time taken for the milestone).
- 4. **Estimated Cost** and **Actual Cost** (fields recording 'planned and real-time' expenditure towards the milestone).
- 5. For adding attachments to the Milestone, click Attach file button in the milestone's pane.

# **Scheduling Milestones**

Milestone Scheduling not only helps you schedule the milestone but also determine whether the milestone is **'on-schedule'**, **'delayed'** or **'ahead'** by comparing it against real-time completion.

To schedule the milestone do the following:

- 1. Configure the Scheduled Start and Scheduled End Date
- 2. Fill in the Actual Start and Actual End Date (upon project completion)
- 3. Fill in the Projected On date; based on these dates, the milestone would be considered:
  - o **On Schedule** if the Scheduled Date **and** Actual Date are the same.
  - Delayed if the Project (Actual Date) has past the Scheduled Date. (no of days by which project is delayed gets displayed on the project list view page)
  - Ahead if the Project (Actual Date) is completed before the Scheduled Date. (no of days by which project is ahead gets displayed on the project list view page)



# **Editing Milestones**

- Select the Milestone from the Milestone List View page and click on **Edit Icon** in the Milestone pane.
- Implement the necessary changes and click on **Update Milestone**

### **Deleting Milestones**

Milestones can be deleted in two ways:

- **a. Bulk Delete:** From Milestone List View, select Milestone to be deleted, and click on Delete Icon.
- **b. Single Delete:** Enter the Milestone to be deleted by clicking on Milestone and click on **Delete Icon**

# **Configuring Tasks:**

- 1. Click **Tasks** tab in the header pane.
- Click Add New Button to open the New Task form. (Use 'Add New Link' while creating first Task)
- 3. Specify Task Title and Task Description.
- 4. Select Status and Priority from the drop down.
- 5. Specify Task Scheduled Start and Scheduled End date

### Adding more details to Task(s):

To indicate Task's progress and to discuss about ways of bettering it, you are provided with the following fields:

- 1. **% of completion** that helps denote the extent to which the task has been completed (any value between 1 100)
- 2. **Comments** that lets project members communicate between themselves about the task as well as the project
- 3. Additional Cost, if any, can be recorded in this field.

# **Scheduling Tasks:**

Task Scheduling not only helps you schedule the task but also determine whether the task is 'on-schedule', 'delayed' or 'ahead' by comparing it against real-time completion.

To schedule the task do the following:

- 1. Configure the Scheduled Start and Scheduled End Date
- 2. Fill in the Actual Start and Actual End Date (upon project completion)
- 3. Based on Scheduled/Actual Dates, task would be considered:

1.

- o On Schedule if the Scheduled Date and Actual Date are the same.
- Delayed if the Task (Actual Date) has past the Scheduled Date. (no of days by which project is delayed gets displayed on the project list view page)
- Ahead if the Task (Actual Date) is completed before the Scheduled Date. (no of days by which project is ahead gets displayed on the project list view page)



### **Editing/Deleting Tasks:**

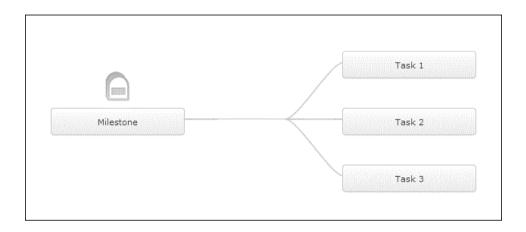
- Select the **Milestone** from the **Milestone List View** page and click on **Edit Icon** in the **Milestone pane**.
- Implement the necessary changes and click on **Update Milestone**
- Bulk Delete: From Milestone List View, select Milestone to be deleted, and click on Delete Icon
- Single Delete: Enter the Task to be deleted by clicking on Task Title and click on Delete
   Icon in the project's pane.

# **Configuring Task Dependency**

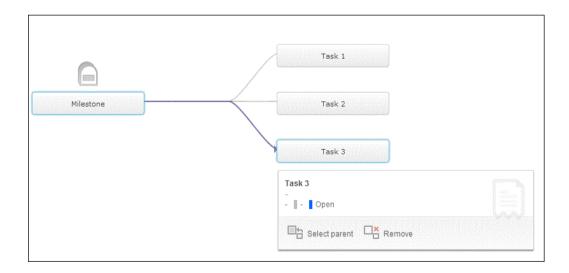
Projects contain innumerable tasks which in some way would be connected to each other since they are working in unison towards the same goal. To clearly define such relationships between tasks and to distinguish parent tasks from child tasks you are presented with the option of configuring task dependencies.

To configure **task dependency**, click on **Dependencies button** and follows the steps mentioned below:

- 1. Select Tasks tab
- 2. Click **Dependencies** button
- 3. Dependency Chart displays all available Tasks



- 4. To configure Task Dependency, move mouse over a Task
- 5. Mouse Hover opens up Task Dependency Dialog box
- 6. Task Dependency Dialog box has two options: Select Parent & Remove buttons



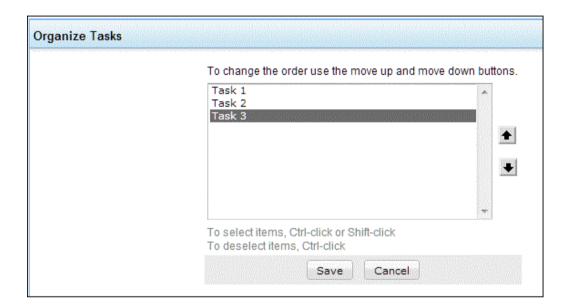
- 7. Click on Select Parent button. All Tasks present would be highlighted from which the Parent Task can be chosen
- 8. Click Remove button to remove/reconfigure the established relationship

# **Configuring Task Order**

Task dependency helps decide which task depends on what thus giving a structure to the project. But still it does not give a definite structue in the sense it does not decide the order in which these tasks would be executed. **Task organization/ordering** is very essential for a project's success and this can be **brought about by clicking** on **Organize button**.

To organize tasks follow the steps mentioned below:

- 1. Select Tasks tab
- 2. Click Organize button. The Organize Tasks pane opens up.



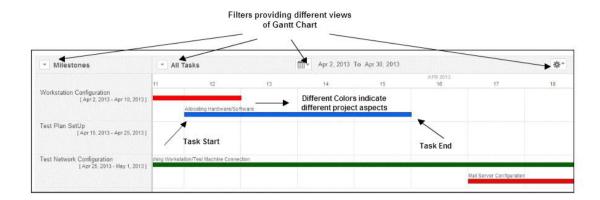
- 3. To reorganize a Task, Ctrl + Click (or) Shift + Click on the Task
- 4. Use 'Move Up' and 'Move Down' buttons to change Task's position
- 5. Click on 'Save'
- 6. To de-select a Task, click Ctrl + Click

### What is Gantt Chart?

Gantt Chart is a bar chart that illustrates a project schedule. This chart also illustrates project elements - along with their schedule against the project calendar - and summarizes the entire project using the chart. It presents a clear picture of the different phases of the project and also of the various activities that occur in the project's work breakdown structure (WBS).

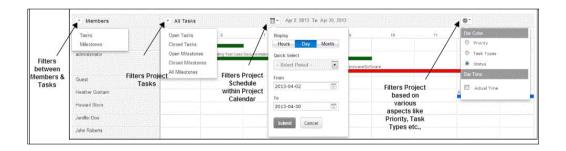
### Advantages:

- Provides bird's eye view of a project and also serves as a one stop solution for accessing the
  entire project module with all it projects (provided, the technician is assigned with Project
  Admin role).
- Effective Resource Management as project constraints like time, manpower and amount of work remaining can be viewed and regulated as per situation demands.
- Rescheduling of Milestones/Tasks and project member role change, if such a need arises, can also done via Gantt Chart.



### **Viewing and Configuring Gantt View:**

- 1. Click on Gantt View Tab
- 2. Gantt Chart with its default view will get displayed.
- Configure Gantt Chart as per your requirement using
  - **a. Gantt Row Type Filter:** Available options are Members, Milestones and Tasks.
  - **b. Gantt Column Type Filter**: Available options are Tasks (Open, Closed and All) & Milestones (Open, Closed and All)
  - c. Project Calendar Filter: Available options are Hours, Day and Month &
  - d. More Settings Filter: Available options are Priority, Task Types and Status
- 4. Gantt Chart would be modified based on your requirements.

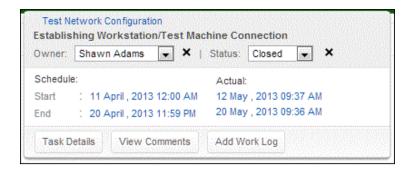


### **Accessing Projects via Gantt Box:**

Gantt Box that appears on mouse over a "milestone/task" serves as a window through which the "milestone/task" can be accessed and edited according to the changes taking place within a project. An entire project can be accessed through Gantt Box if the project member has the rights to do so. This quick access enhances the effectiveness of Gantt Chart and is very useful in supervising the project.

Using **Gantt Box** the following can be done:

- 1. Rescheduling of Milestones (or) Tasks and Changing of Milestone/Task details
- 2. Reassigning of Milestones/Tasks to Project Members
- 3. Changing of Milestone/Task Status
- 4. Adding Worklogs and Comments



# **Gantt View Tab and Gantt View Across All Projects Button:**

Gantt Chart can be accessed in two different ways:

- By clicking on "Gantt View" Tab (in the project's pane) (or) by clicking on "Gantt View

  Across All Projects Button"
- As the name suggests, the latter presents the gantt view of all projects present in projects module
- Gantt View Across All Projects Button present in the projects list view page is useful for project administrators
- Using this button gantt chart can not only be filtered based on milestones and tasks but also based on project names and project status.

**Note:** Projects can be associated with Change using 'Associate Change' option (available under Actions button)



**Project Screenshot** 

# Requester as Team Leader

- Adding Tasks to Milestones
- Establishing Task Dependency
- Gantt Chart (and its different views)
- Project Screenshot

# Implementing your Projects

**Configuring milestones, adding tasks and establishing dependency between tasks** form the core of project creation. In this section you look at how these things are done:

### **Configuring Tasks:**

- 1. Click **Tasks** tab in the header pane.
- Click Add New Button to open the New Task form. (Use 'Add New Link' while creating first Task)
- 3. Specify Task Title and Task Description.
- 4. Select Status and Priority from the drop down.
- 5. Specify Task Scheduled Start and Scheduled End date

### Adding more details to Task(s):

To indicate Task's progress and to discuss about ways of bettering it, you are provided with the following fields:

- 1. **% of completion** that helps denote the extent to which the task has been completed (any value between 1 100)
- 2. **Comments** that lets project members communicate between themselves about the task as well as the project
- 3. Additional Cost, if any, can be recorded in this field.

### **Scheduling Tasks:**

Task Scheduling not only helps you schedule the task but also determine whether the task is **'on-schedule'**, **'delayed' or 'ahead'** by comparing it against real-time completion.

To schedule the task do the following:

- 1. Configure the Scheduled Start and Scheduled End Date
- 2. Fill in the Actual Start and Actual End Date (upon project completion)
- 3. Based on **Scheduled/Actual Dates**, task would be considered:

1.

- On Schedule if the Scheduled Date and Actual Date are the same.
- Delayed if the Task (Actual Date) has past the Scheduled Date. (no of days by which project is delayed gets displayed on the project list view page)

 Ahead if the Task (Actual Date) is completed before the Scheduled Date. (no of days by which project is ahead gets displayed on the project list view page)



# **Editing/Deleting Tasks:**

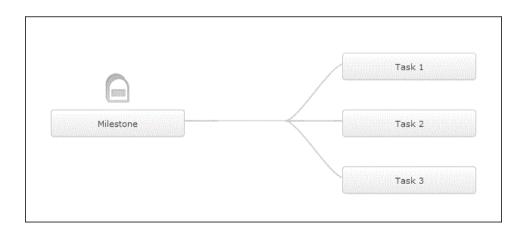
- Select the Milestone from the Milestone List View page and click on Edit Icon in the Milestone pane.
- Implement the necessary changes and click on Update Milestone
- Bulk Delete: From Milestone List View, select Milestone to be deleted, and click on Delete Icon
- Single Delete: **Enter the Task** to be deleted by clicking on Task Title and click on **Delete Icon** in the project's pane.

# **Configuring Task Dependency**

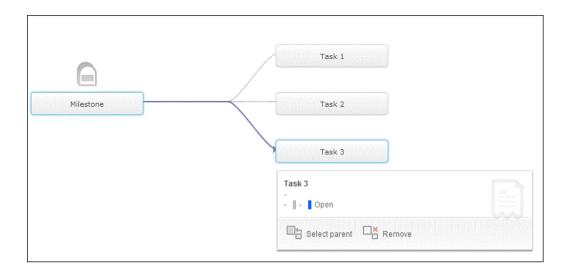
Projects contain innumerable tasks which in some way would be connected to each other since they are working in unison towards the same goal. To clearly define such relationships between tasks and to distinguish parent tasks from child tasks you are presented with the option of configuring task dependencies.

To configure **task dependency**, click on **Dependencies button** and follows the steps mentioned below:

- 1. Select Tasks tab
- 2. Click **Dependencies** button
- 3. Dependency Chart displays all available Tasks



- 4. To configure Task Dependency, move mouse over a Task
- 5. Mouse Hover opens up Task Dependency Dialog box
- 6. Task Dependency Dialog box has two options: Select Parent & Remove buttons



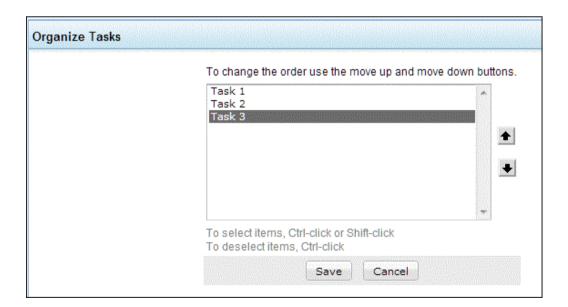
- 7. Click on Select Parent button. All Tasks present would be highlighted from which the Parent Task can be chosen
- 8. Click Remove button to remove/reconfigure the established relationship

# **Configuring Task Order**

Task dependency helps decide which task depends on what thus giving a structure to the project. But still it does not give a definite structue in the sense it does not decide the order in which these tasks would be executed. **Task organization/ordering** is very essential for a project's success and this can be **brought about by clicking** on **Organize button.** 

To organize tasks follow the steps mentioned below:

- 1. Select Tasks tab
- 2. Click **Organize** button. The **Organize Tasks** pane opens up.



- 3. To reorganize a Task, Ctrl + Click (or) Shift + Click on the Task
- 4. Use 'Move Up' and 'Move Down' buttons to change Task's position

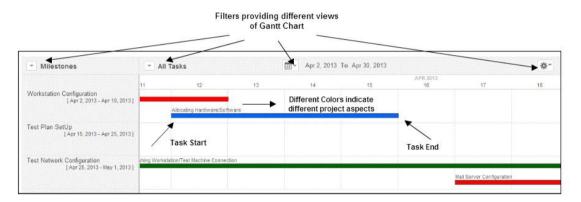
- 5. Click on 'Save'
- 6. To de-select a Task, click Ctrl + Click

### What is Gantt Chart?

Gantt Chart is a bar chart that illustrates a project schedule. This chart also illustrates project elements - along with their schedule against the project calendar - and summarizes the entire project using the chart. It presents a clear picture of the different phases of the project and also of the various activities that occur in the project's work breakdown structure (WBS).

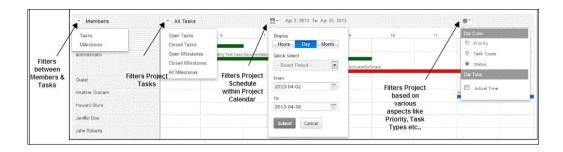
### Advantages:

- Provides bird's eye view of a project and also serves as a one stop solution for accessing the
  entire project module with all it projects (provided, the technician is assigned with Project
  Admin role).
- Effective Resource Management as project constraints like time, manpower and amount of work remaining can be viewed and regulated as per situation demands.
- Rescheduling of Milestones/Tasks and project member role change, if such a need arises, can also done via Gantt Chart.



### **Viewing and Configuring Gantt View:**

- 1. Click on Gantt View Tab
- 2. Gantt Chart with its default view will get displayed.
- 3. Configure Gantt Chart as per your requirement using
  - a. Gantt Row Type Filter: Available options are Members, Milestones and Tasks.
  - **b. Gantt Column Type Filter**: Available options are Tasks (Open, Closed and All) & Milestones (Open, Closed and All)
  - c. Project Calendar Filter: Available options are Hours, Day and Month &
  - d. More Settings Filter: Available options are Priority, Task Types and Status
- 4. Gantt Chart would be modified based on your requirements.

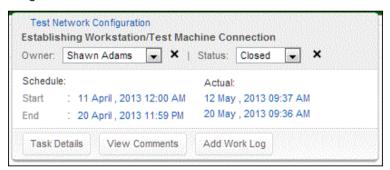


# **Accessing Projects via Gantt Box:**

Gantt Box that appears on mouse over a "milestone/task" serves as a window through which the "milestone/task" can be accessed and edited according to the changes taking place within a project. An entire project can be accessed through Gantt Box if the project member has the rights to do so. This quick access enhances the effectiveness of Gantt Chart and is very useful in supervising the project.

Using Gantt Box the following can be done:

- 1. Rescheduling of Milestones (or) Tasks and Changing of Milestone/Task details
- 2. Reassigning of Milestones/Tasks to Project Members
- 3. Changing of Milestone/Task Status
- 4. Adding Worklogs and Comments



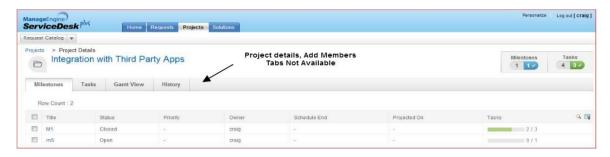
# **Gantt View Tab and Gantt View Across All Projects Button:**

Gantt Chart can be accessed in two different ways:

- As the name suggests, the latter presents the gantt view of all projects present in projects module
- Gantt View Across All Projects Button present in the projects list view page is useful for project administrators
- Using this button gantt chart can not only be filtered based on milestones and tasks but also based on project names and project status.

# ManageEngine ServiceDesk Plus - User Guide

**Note:** Projects can be associated with Change using 'Associate Change' option (available under Actions button)



**Project Screenshot** 

# Requester as Team Member

- Working on Tasks
- Gantt Chart (and its different views)
- Project Screenshot

# Implementing your Projects

Configuring milestones, adding tasks and establishing dependency between tasks form the core of project creation. In this section you look at how these things are done:

### **Editing Tasks:**

- 1. Click **Tasks** tab in the header pane.
- 2. Specify Task Title and Task Description.
- 3. Select Status and Priority from the drop down.
- 4. Specify Task Scheduled Start and Scheduled End date

### Adding more details to Task(s):

To indicate Task's progress and to discuss about ways of bettering it, you are provided with the following fields:

- 1. **% of completion** that helps denote the extent to which the task has been completed (any value between 1 100)
- 2. **Comments** that lets project members communicate between themselves about the task as well as the project
- 3. Additional Cost, if any, can be recorded in this field.

# **Scheduling Tasks:**

Task Scheduling not only helps you schedule the task but also determine whether the task is 'on-schedule', 'delayed' or 'ahead' by comparing it against real-time completion.

To schedule the task do the following:

- 1. Configure the Scheduled Start and Scheduled End Date
- 2. Fill in the Actual Start and Actual End Date (upon project completion)
- 3. Based on **Scheduled/Actual Dates**, task would be considered:
  - On Schedule if the Scheduled Date and Actual Date are the same.
  - Delayed if the Task (Actual Date) has past the Scheduled Date. (no of days by which project is delayed gets displayed on the project list view page)
  - Ahead if the Task (Actual Date) is completed before the Scheduled Date. (no of days by which project is ahead gets displayed on the project list view page)



# **Deleting Tasks:**

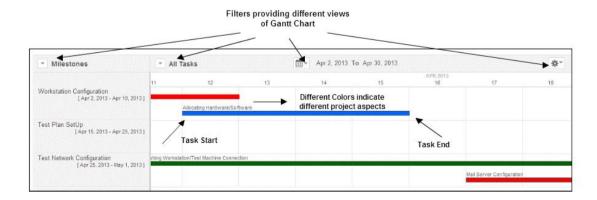
- **Bulk Delete**: From Milestone List View, select Milestone to be deleted, and click on Delete Icon
- Single Delete: Enter the Task to be deleted by clicking on Task Title and click on Delete Icon in the project's pane.

### What is Gantt Chart?

Gantt Chart is a bar chart that illustrates a project schedule. This chart also illustrates project elements - along with their schedule against the project calendar - and summarizes the entire project using the chart. It presents a clear picture of the different phases of the project and also of the various activities that occur in the project's work breakdown structure (WBS).

### Advantages:

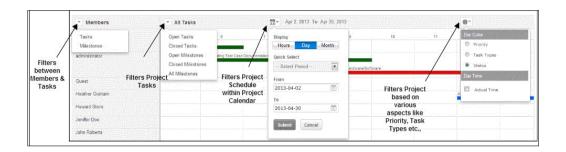
- Provides bird's eye view of a project and also serves as a one stop solution for accessing the
  entire project module with all it projects (provided, the technician is assigned with Project
  Admin role).
- Effective Resource Management as project constraints like time, manpower and amount of work remaining can be viewed and regulated as per situation demands.
- Rescheduling of Milestones/Tasks and project member role change, if such a need arises, can also done via Gantt Chart.



# **Viewing and Configuring Gantt View:**

- 1. Click on Gantt View Tab
- 2. Gantt Chart with its default view will get displayed.

- 3. Configure Gantt Chart as per your requirement using
  - **a. Gantt Row Type Filter:** Available options are Members, Milestones and Tasks.
  - **b. Gantt Column Type Filter**: Available options are Tasks (Open, Closed and All) & Milestones (Open, Closed and All)
  - c. Project Calendar Filter: Available options are Hours, Day and Month &
  - d. More Settings Filter: Available options are Priority, Task Types and Status
- 4. Gantt Chart would be modified based on your requirements.

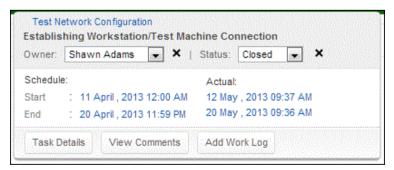


# **Accessing Projects via Gantt Box:**

Gantt Box that appears on mouse over a "milestone/task" serves as a window through which the "milestone/task" can be accessed and edited according to the changes taking place within a project. An entire project can be accessed through Gantt Box if the project member has the rights to do so. This quick access enhances the effectiveness of Gantt Chart and is very useful in supervising the project.

Using **Gantt Box** the following can be done:

- 1. Rescheduling of Milestones (or) Tasks and Changing of Milestone/Task details
- 2. Reassigning of Milestones/Tasks to Project Members
- 3. Changing of Milestone/Task Status
- 4. Adding Worklogs and Comments



# **Gantt View Tab and Gantt View Across All Projects Button:**

Gantt Chart can be accessed in two different ways:

- By clicking on "Gantt View" Tab (in the project's pane) (or) by clicking on "Gantt View

  Across All Projects Button"
- As the name suggests, the latter presents the gantt view of all projects present in projects module
- Gantt View Across All Projects Button present in the projects list view page is useful for project administrators
- Using this button gantt chart can not only be filtered based on milestones and tasks but also based on project names and project status.

**Note:** Projects can be associated with Change using 'Associate Change' option (available under Actions button)



**Project Screenshot** 

# **Frequently Asked Questions**

- What do we mean by Project Member Status?
- How can the Inactive State of Project Members be described?
- What about Milestones/Tasks associated with a deleted/inactive Project Member?
- Can one change the role associated with a project member?
- Who can be a project, milestone or task owner?

# What do we mean by project member Status?

As the name suggests Project Member Status refers to the status of Project Members, which can be either **Active or Inactive.** 

- Active Project Member is the one who is actively participating in the project.
- Inactive Project Member is the one who is a part of the project but has been sidelined for some reason.

Note: Apart from Active & Inactive project members, you have Deleted Members as well.

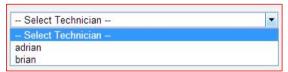


**Select Member Status Drop Down** 

### How can the inactive state of project members be described?

When a project member is made inactive it means the respective member has been sidelined for some reason; it could be that the guy is sick and is on leave, or the guy has been reassigned to some other project and so on. When such situations arise, project members are made inactive.

- 1. **Inactive member** is still a part of the project and **can be reinstated** at any given time (using **User Status** drop down).
- 2. Inactive member would not appear in select owner drop down while assiging Milestones/Tasks (from the time he/she has been made inactive)



# **Select Owner Dropdown**

- Open Milestones/Tasks that were assigned to the inactive project member would automatically attain Open Status, signalling to the project admin/member that they need reassigning.
- Workdone by a project member who has been made inactive would not be lost; they
  remain intact so that other project members can take over from where the inactive member
  left off.

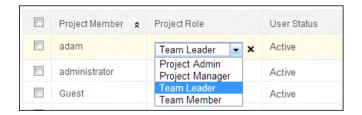
Note Project Member Deletion is same like that of making a Project Member Inactive; the deleted member would not figure in 'select owner list' and the tasks assigned to him/her can be reassigned to others.

# What about Milestones/Tasks associated with a deleted/inactive Project Member?

Project Member Status	If Milestone Status Is	If Task Status Is	What will happen?
Inactive/ Deleted	Open	Open	1 Milestone/Task will be dissociated from the inactive user and would be available under the respective Milestone/Task list so that it can be reassigned.  2 Member would not appear in the 'Select Owner Drop Down'
	Closed, Onhold & Canceled	Closed, Onhold & Canceled	Will be dissociated from the inactive user, but the work done by him so far would remain intact, so that it can be used if needed.      Member would not appear in the 'Select Owner Drop Down'

# Can one change the role associated with a project member?

Yes, at anytime during the project it is possible to change a project members role, provided you are the **project admin/manager**. To do so, click on **Select Project Role Drop Down.** 



# **Select Project Role Drop Down**

**Note:** During role change the access permissions of the respective member would be changed, as he would be either provided or stripped of certain rights in the project. <to know more about roles & their access permissions, **refer <Table>** 

# Who can be a project, milestone, or a task owner?

Owner drop-down list - in project, milestone & task details page - gets automatically populated with members as you add them to your project. This automated population is based on the member's project role. **Example**: Member with **project admin role** has rights to everyting (projects, milestones & tasks); so naturally he/she - while being added to the project - will be listed under "owner drop-down lists" of project, milestone and tasks, and thus will be ready for selection.

By default, **Team Member role** will be assigned to a **new project member** (whose role hasn't yet been decided by you/administrator) and he/she will be listed under **task owner drop-down list** 



Select Owner Drop-Down (in Milestone details page)

Defaul project roles and their respective permissions are listed below:

- Project Admin will get listed under project, milestone and task owner list
- Project Member will get listed under project, milestone and task owner list
- Team Member will get listed under milestone and task owner list

Team Leader - willl get listed under task owner list

# **Mobile Client**

Instead of sending e-mails or calling up the help desk to report an issue, you can instantly raise request from your iPhone or Blackberry mobile phones using **ServiceDesk Plus Mobile Client**. The Mobile Client helps you raise requests instantly and provides easy access to track your requests, anywhere, anytime.

The Mobile Client is compatible with mobile devices such as Blackberry and iPhone, and is accessed through the mobile browser on typing the URL http://<machine-name>:<port-number>, which redirects to the 'mc' context.

#### **Features**

- A browser based web application to access tickets from any location.
- Supports request module features such as, creating incident request and viewing request details.

#### Limitations

- Currently, the Mobile Client supports only request module.
- Compatible with mobile devices such as Blackberry and iPhone.

### Logging into ServiceDesk Plus

On connecting your mobile device to http://<machine-name>:<port-number>/mc, the screen opens to displays the login page.

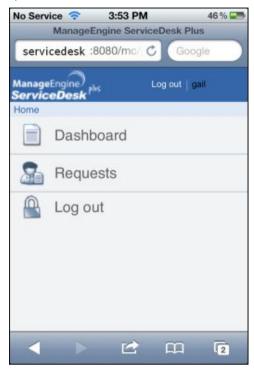
- Username: Enter the Username of the requester
- Password: Enter the Password of the requester
- **For Domain:** Choose the domain of the requester. If the domain is not selected then it is considered as 'Not in any domain'.
- Is AD Auth: Select the check box for AD Authentication.

NOTE: ServiceDesk Plus Mobile Client does not support Single Sign-On (SSO)



# Click Login button.

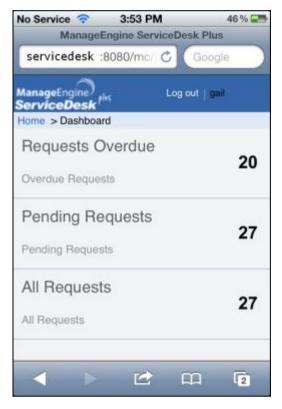
On logging into the application from your mobile device, the home page displays the **Dashboard**, **Requests** and **Log out** options.



- Dashboard: Displays the number of Overdue Requests, Pending Requests and All Requests raised by the logged in requester
- Requests: Displays the request list view with options to view All Pending Requests and Incident/Service Requests raised by the logged in requester
- Log out: To log out from the mobile client

### **Dashboard**

The dashboard of the logged in requester comprises of the number of overdue requests, pending requests and all requests raised by the requester. Click an option to display the list of requests under it.



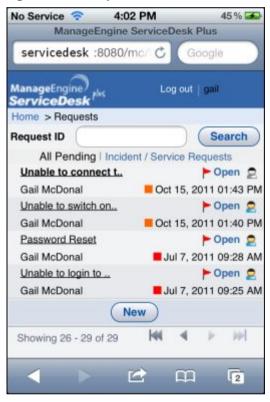
To revert back to the Home page click the **Home** link on the top right corner of the page.

# Requests

Selecting **Requests** from the Home page takes you to **All Pending** requests by default. The requests view options comprises of **All Pending Requests** and **Incident/Service Requests**.

### **Request List View**

Request List View displays the **Subject** of the request, name of the **requester**, **status** of the request, created date and time, technician assign icon, priority color code, first response time overdue flag, request overdue flag, and first response and resolution overdue flag.



# Representation of icons from the Request List View

- O- Indicates that the First Response Time is overdue
- Indicates that the request is overdue
- Or Indicates that the first response and resolution time are overdue
- Property is a second to a second to the request
- P- Indicates unassigned requests i.e., technician is not assigned to the request

### Operations performed from the Request List View

- Search Requests based on Request ID: Search for requests instantly by entering the Request ID in the Search field
- New: Option to create new requests

The request list view displays a total of five requests in a page. You can navigate to other pages using the navigation options below the page. To revert back to the Home page, click the **Home** link on the top right corner of the page.

# **Creating Incident Request**

Creating incident requests is simple and instant. All you need to do is enter the Request Title and Description of the issue you are facing. To create new request, click **New** button from the Request List View.



In the New Incident form, enter the following details,

- Requester Name: By default, the name of the logged in requester is populated in this field.
- Request Title: Enter a brief summary of the request.
- **Description:** Enter a detailed description about the issue.

Click Add button. The request is saved and appears in the Request List View.

**NOTE:** Requests cannot be created through Request Template though templates are configured in the server.

# **Viewing Request Details**

Click the request you want to view from the request list view page. The request details page displays the **Request ID**, **Requester**, **Status** of the request along with the overdue flag, **Technician** assigned to the request, **Priority** along with color code, **Due by Time** of the request, **Subject** and **Description**.



Click **More details...** link to get the entire detail of the request such as, request type, impact, status, due by time, response due by time and so on. Click **Back** button to go back to View Request page.

If the description exceeds 250 characters then **(More...)** link appears. Click the link to view the entire description.

# **Solutions**

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

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

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

where,

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

# **Browse Solutions by Topic**

If you want to search for solutions under a specific topic like Hardware or Printer, then you can limit your view by browsing solutions by topics.

To browse for solutions under a topic,

- 1. Click the **Solutions** tab in the header pane. This opens the Solutions list view page.
- 2. Hover over **Browse by Topics** drop-down link. The list of all the topics and their sub topics opens in a popup.



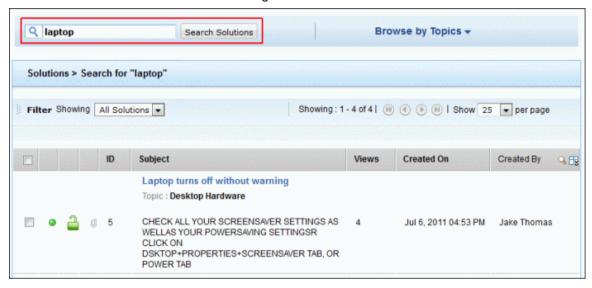
- 3. To view all the sub topics, click >>Show All link. This lists out the topics and sub topics in a logical manner.
- 4. Click a topic or sub topic to view the solutions under it.

# Search for a Solution

When you login to the Self Service Portal, you can search for your desired solutions using the **Keyword Search** or the **Column-wise Search**.

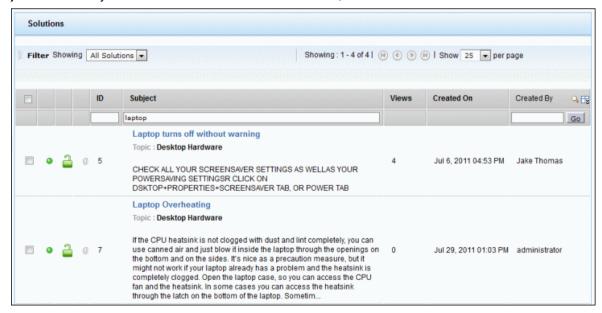
### To perform keyword search,

- 1. Click **Solutions** tab in the header pane.
- 2. In the Search block, enter a keyword relevant to your solution like laptop or printer.
- 3. Click **Search Solutions** button or hit **Enter** key in your keyboard. The search results display all the solutions that match the search string.



### To perform column-wise search,

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



# ManageEngine ServiceDesk Plus - User Guide

- 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.

# **My Details**

While creating your login details in the ServiceDesk Plus application, your profile would have some default information. This information would appear in **My Details** tab in Self Service Portal. But you can view **My Details** tab only if the Administrator has enabled the settings to **View your profile** in Self Service Portal Settings.

The My Details tab consists of information like your **Name**, **Employee ID**, **E-mail ID**, **Phone** and **Mobile numbers**, **Department Name** and **Job Title**. You have the freedom to edit your profile and keep it updated with the latest changes.

**NOTE:** You can update your details only if the administrator has enabled the settings to **Edit your profile** in Self Service Portal Settings.

# **Edit My Details**

In **My Details** tab, you can edit your details and need not depend on your IT help desk team to do the same for you. It gives you the freedom to modify your own profile whenever you want and saves considerable time.

To edit your profile,

- 1. Click the **My Details** tab in the header pane. The next page displays your user profile as created/edited last time in an editable form.
- 2. All the fields in this form are editable. Your **Name** is a mandatory field in the form. You can choose to leave the other fields blank. The information that you can edit are your Name, Employee ID, E-mail ID, Phone and Mobile numbers, Department Name and Job Title.
- 3. To change your department name, you need to select from the list of departments that are available in your site from the drop-down menu.
- 4. When you are done with the modifications, click **Update Details**.

**NOTE:** You can edit your details only if the Administrator has enabled the option to **Edit your profile** in Self Service Portal Settings.