



ManageEngine

ServiceDesk Plus

Manual

The first phase

Incident Management service for the Zrenjanin site

Ver. 1.0

February 2023

ServiceDesk Plus is ManageEngine's full-stack service for managing enterprises. Deliver flawless IT services with intelligent automation, standardized workflows, and enhanced self-service capabilities. Extend proven ITSM best practices to other departments like HR and facilities using native enterprise service desk capabilities. ServiceDesk Plus contains Incident Management, Problem Management, Change Management, Assets Management, Service Catalog, CMDB, and Reporting features.

The topic of this manual is only the Incident Management feature.

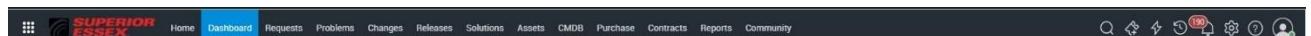
To access Essex Furukawa's ServiceDesk Plus service follow the link:

<https://superhelp.spsx.com/>

Page organization

Every page on this service has four zones.:.

Top menu – first zone



Links in the Top menu zone are giving you access to the all feature of ServiceDesk+ applications.

Periodically there are notifications above or under Top Menu. These notifications haven't importance for Technician work. Those notifications are for the ServiceDesk Plus's support team.

On the right side of the top menu is the toolbar. It is the place for advanced tools.



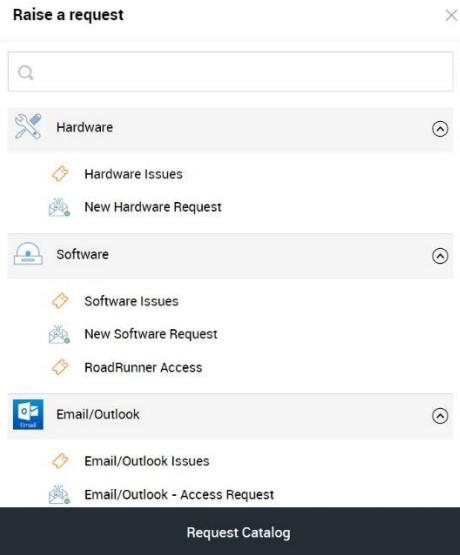
1. Search tool

From every page on the ServiceDesk+ portal technician can make a search on different criteria. With this tool, technicians can also search for requests.

A screenshot of the ServiceDesk Plus interface. The top navigation bar shows 'SUPERIOR ESSEX' logo, search bar, and toolbar. The sidebar on the left lists categories: Requests, Archived Requests, Problems, Changes, Asset, Workstation, Software, CIs, Purchase, Contracts, Releases, Solutions, System Log, and Users (which is checked). The main content area shows 'Users' with sub-links: Additional Fields, Users, Support Groups, Group Roles, Active Directory, LDAP, Sign On, Leave Types, and Auto Assign. To the right is a 'Helpdesk Customizer' section with links for Category, Status, Level, Impact, Urgency, Priority, Priority Matrix, Request Type, Worklog Type, Task Types, Task Template, Task Closing Rules, Task Custom Triggers, Task Custom Function, WorkLog - Additional Fields, Notification Rules, Checklist, and Announcement Type.

2. New Request

With this tool, the technician can Raise a request. The technician can choose different templates to create requests. For now, we are suggesting using the default template.



By choosing Request Catalog technician will be sent to the Service Category page. All users have access to this page when they login to superhelp.spsx.com.

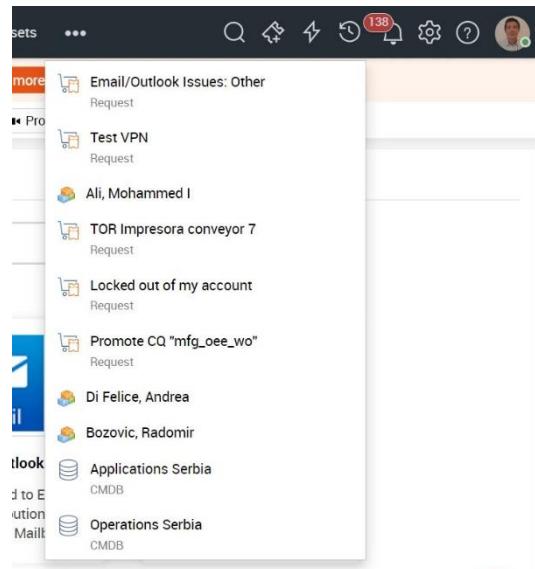
3. Quick Actions

Enable technician to access to the most important tools in ServiceDesk+. From there, technicians can raise requests, and problems, request for change, add solutions, broadcast messages, add assets, and many other tools.

The screenshot shows the 'Quick Actions' interface. It has three main sections: 'Create new', 'Scheduler', and 'Tasks'. The 'Create new' section contains icons for Incident, Problem, Change, Release, Solution, Asset, Workstation, Server, Software License, Purchase Order, and Purchase Request. The 'Scheduler' section contains 'My Schedule', 'Tech Availability Chart', 'Logged-in Technicians', and 'Mark Unavailability'. The 'Tasks' section contains 'My Tasks', 'All Tasks', and a '+ Add New' button. Below the 'Tasks' section is a 'Reminders' section with a '+ Add New' button and 'My Reminder(s)'.

4. Recent Items

With these tools, a technician can see a list of requests they have recently viewed.



5. Notifications

Here technicians can see notifications from ServiceDesk+ service. Those notifications aren't important for technician work.

The screenshot shows the 'Notifications' page with a search bar at the top. Below it, a section for 'Today' displays two notifications:

- A red circular icon with a minus sign next to the text: "Import failed for 1 user(s) from domain SRB.EU.SPSX.COM on 23/02/2023 10:19 AM".
- A blue circular icon with a document icon next to the text: "1 User(s) were found to be deleted in Active Directory while importing users from EAP.SPSX.COM domain on 23/02/2023 02:22 AM".

Below the 'Today' section is a 'Yesterday' section containing a single notification:

- A blue circular icon with a document icon next to the text: "1 User(s) were found to be deleted in Active Directory while importing users from EAPSPSX.COM domain on 22/02/2023 02:19 AM".

At the bottom is a section for "2023.02.21" which contains a single notification:

- A blue circular icon with a document icon next to the text: "1 User(s) were found to be deleted in Active Directory while importing users from".

6. Admin

With this link, technicians can access the ServiceDesk+ Administration Setting page. All the important tools for customizing and setting up the ServiceDesk+ are located on this page.

The screenshot shows the 'Admin Settings' page with a navigation bar at the top featuring links like Advanced Analytics, ADManager Plus, PMP, KMP, Site24x7, OpManager, AD Self Service, Zoho Creator App, and Product Overview.

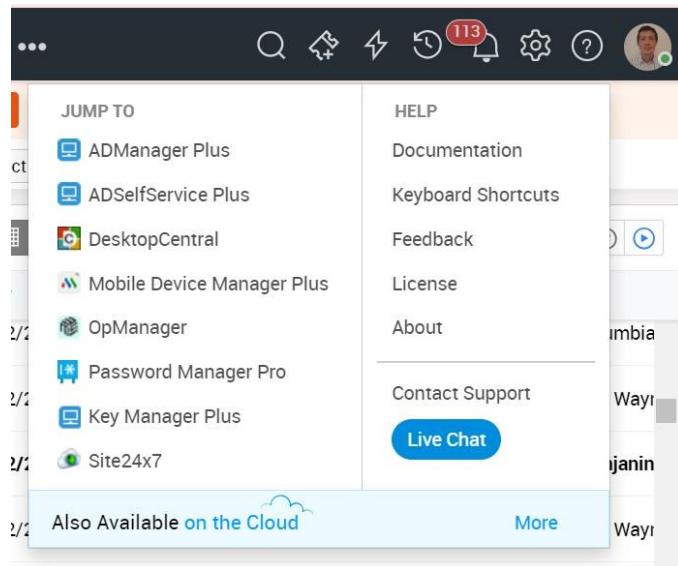
The main area is divided into three sections:

- Organizational Details**: Contains icons for buildings and a person, with links to Organization Details, Mail Server Settings, SMS Notification Settings, Regions, Sites, Operational hours, Holidays, Departments, and Organization Roles.
- Users**: Contains an icon of a person with a document, with links to Roles, User - Additional Fields, Users, Technicians, Support Groups, Group Roles, User Groups, Active Directory, LDAP, SAML Single Sign On, Leave Types, and Technician Auto Assign.
- Helpdesk Customizer**: Contains an icon of a ticket, with links to Category, Status, Level, Mode, Impact, Urgency, Priority, Priority Matrix, Request Type, Worklog Type, Task Types, Task Template, Task Closing Rules, Task Custom Triggers, and Task Custom Function.

At the bottom, there is a URL bar with the address https://superhelp.spzx.com/Dashboard.do, and a footer with links for Chats, Technician, Groups, and a Zoho logo with a '135' badge.

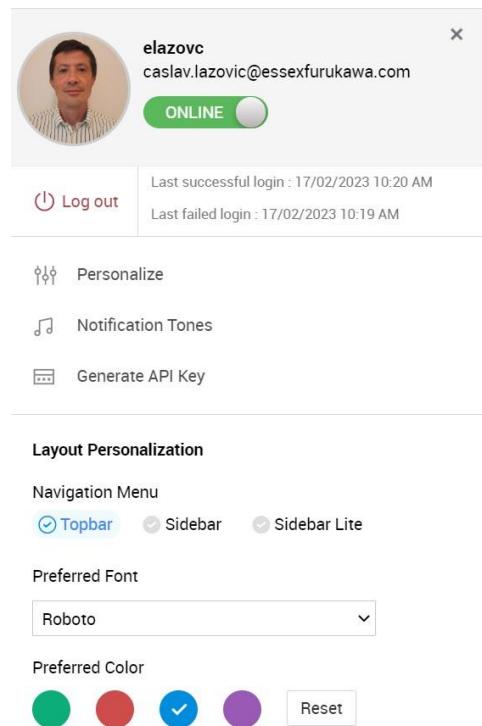
7.Help

Access to Help tool. On this place technicians can find all information about ServiceDesk+ service.

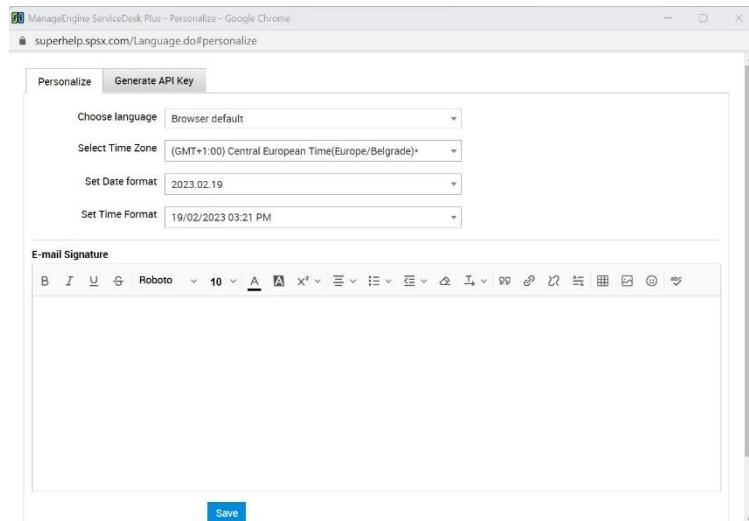


8. User profile

Using this tool technicians can customize of ServiceDesk+ page look (change color, font, and notification Tones). The technician can also change his online status.



On the Personalize page technicians can change the time zone, date/time format, and language.



Widgets toolbar – second zone



This toolbar is the place for quick access tools and offered widgets. Most of the widget in this toolbar is not enabled. Technicians can use Quick create and Scribble Pad tools and Product Overview.

Main - third zone

Open Requests		ID	Subject	Requester Name	Assigned To	DueBy	Status	Created Date	Site
<input type="checkbox"/>	<input type="checkbox"/>	14005	[EXTERNAL]10.5.2.152 BWOD-B...	Moffatt, Shelly	Unassigned	15/02/2023 12:00 ...	Open	12/02/2023 08:34 ...	Brownwo...
<input type="checkbox"/>	<input type="checkbox"/>	14004	SUCCESS - Reindex reqs	ipurchase@superi...	Unassigned	15/02/2023 12:00 ...	Open	12/02/2023 06:15 ...	-
<input type="checkbox"/>	<input type="checkbox"/>	14003	ERROR - Reindex reqs	ipurchase@superi...	Unassigned	15/02/2023 12:00 ...	Open	12/02/2023 05:44 ...	-
<input type="checkbox"/>	<input type="checkbox"/>	14002	ERROR - Reindex reqs	ipurchase@superi...	Unassigned	15/02/2023 12:00 ...	Open	12/02/2023 05:26 ...	-
<input type="checkbox"/>	<input type="checkbox"/>	14001	ERROR - Reindex reqs	ipurchase@superi...	Unassigned	15/02/2023 12:00 ...	Open	12/02/2023 05:12 ...	-

This zone is the central place of the page, the Technicians working zone.

Footer – fourth zone



This zone is the place for communication between Technicians.

Technicians' organization in the Incident Management service and rules

The ServiceDesk+ service supports the organization of users according to site affiliation. In Active Directory every user has a site parameter configured. When a user sends a mail to superhelp@spx.com or logs into the Superhelp portal, ServiceDesk+ recognizes the user's site to which they belong.

European sites are: Zrenjanin, Quattordio, Meyzieu, Castleford, Bad Arolsen, and Bramsche.

Every site has Support groups. Zrenjanin has Applications Serbia and Operations Serbia.

Technicians belong to the group according to their jobs. One technician can be part of several groups.

Zrenjanin site support groups members:

Operations Serbia: Di Felice Andrea, Lazovic Caslav, Lapadat Mihael, and Zenke Patrick.

Applications Serbia: Bozovic Radomir, Di Felice, Andrea, Lazovic Caslav, Manevski Milan, Quarona Marco, Skrgic Jovica, Zenke Patrick

Tickets of the users from Zrenjanin raised by sending emails to superhelp@spx.com or by creating requests on the portal <https://superhelp.spx.com/> can be only assigned to one of these groups.

Ticket routing is done by Incident Management - Business Rules.

The screenshot shows the 'Incident Management - Business Rules' interface. At the top, there is a header bar with 'Incident Management - Business Rules' and navigation buttons for 'Previous' and 'Next'. Below the header, there is a toolbar with buttons for 'Rules for site' (set to 'Zrenjanin'), 'Rule Group', 'Organize', and a search bar. The main area displays two categories of rules: 'Categorize' (1 rule) and 'Dispatch' (2 rules). The 'Dispatch' category is highlighted with a yellow background. Under 'Dispatch', there are two rules: 'Group Assignments for Operations' and 'Group Assignments for Applications'. Both rules have checkboxes and edit icons. The 'Group Assignments for Operations' rule is currently selected, indicated by a blue toggle switch. To the right of each rule, there is a 'Skip remaining rules across ...' dropdown menu.

Zrenjanin site has three rules. Rules are configured for cascade execution. First in line for execution is:

Categorize rules:

Categorize QAD issues rule is used to set the Category value to QAD if the user's requests have the word QAD in the subject, mail body, or in the request description.

After this rule, the following rules are executed:

Dispatch rules:

The group Assignments for Operations rule is used to assign tickets to the Operations Serbia group if the user's e-mail contains one of these words in the subject, mail body, or in the request description.:

office, mail, account, laptop, computer, printer, folder, internet, software, install, štampač, telefon, vpn, Hardware, and program.

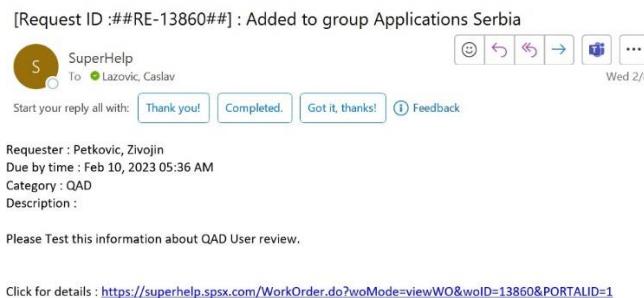
If the e-mail or request doesn't contain any of those words next rule will be executed.

Group Assignments for Applications rules is the last stop rule. With this rule, the ticket is assigned to the Applications Serbia group. This means that users' tickets from Zrenjanin can only be assigned to the Operations Serbia or Applications Serbia group.

The rules for word checking in e-mails or requests are not case-sensitive.

The technician can accept only the ticket assigned to the group to which he belongs.

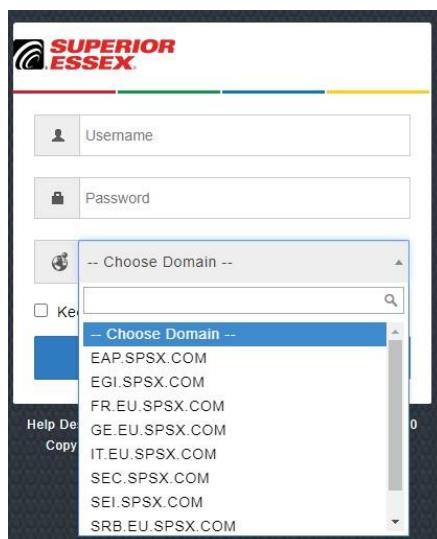
When a ticket is associated with the group all technicians from that group will get an e-mail notification.



If any technician does not accept the ticket after one day, Di Felice Andrea, Caslav Lazovic, and Zenke Patrick will be notified.

ServiceDesk+ portal organization

To access all functionalities of ServiceDesk Plus first you must log in:



For login, you use your AD credentials and must choose an appropriate domain for your account.

Home page

After successful login, you are landing on the Home page.

The screenshot shows the ServiceDesk Plus Home page for Technicians. At the top, there's a navigation bar with links like Home, Dashboard, Requests, Problems, Changes, Releases, Solutions, Assets, CMDB, Purchase, Contracts, Reports, and Community. A banner at the top right says "You are missing out on advanced security configurations." Below the banner, there are several sections: "My Summary" showing counts for Requests Overdue, Requests Due Today, Pending Requests, Approved Changes, Unapproved Changes, Open Problems, and Unassigned Problems; "My Tasks(0)" which is empty; "My Approvals" which is also empty; "Announcements" which is empty; and "My Reminder(s)" which is empty. There are also icons for "New Task", "New Approval", and "New Reminder".

Home page for Technicians is a personal technician dashboard. It is customizable and it is completely different from the common user's Home page. There he can see things related to his work.

Dashboard

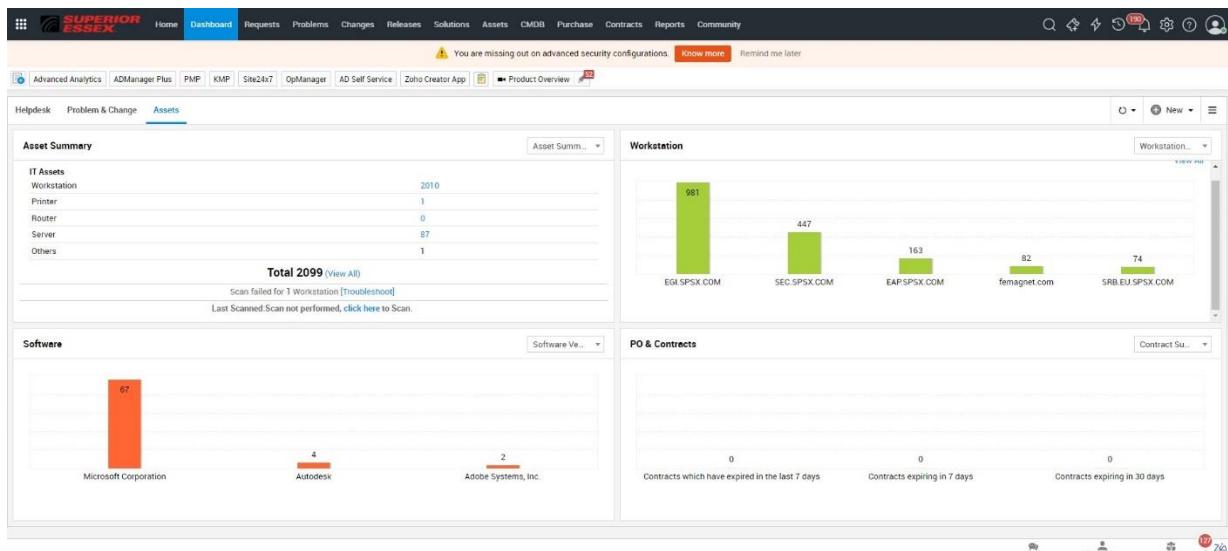
The second link in the top menu is the Dashboard page. On the Dashboard page, Technician can see the information on the ServiceDesk Plus statistic. This page has a submenu with links: Helpdesk, Problem & Change, and Assets.

The Helpdesk page is an overview of the Organization's Incidents and Requests

The screenshot shows the ServiceDesk Plus Helpdesk page. The top navigation bar includes links for Home, Dashboard, Requests, Problems, Changes, Releases, Solutions, Assets, CMDB, Purchase, Contracts, Reports, and Community. A banner at the top right says "You are missing out on advanced security configurations." Below the banner, there are three main sections: "Requests by Service" (a table showing counts for Printers/Scanners/Copiers, Software, Hardware, Shop Floor, MX Open, Others, and Unassigned), "Request Summary" (a line chart showing the number of requests per day over the last week, with data points for Overdue (90), Inbound (322), and Completed (284)), and "Unsigned And Open Requests" (a gauge chart showing the count of unsigned and open requests, with values ranging from 0 to 378).

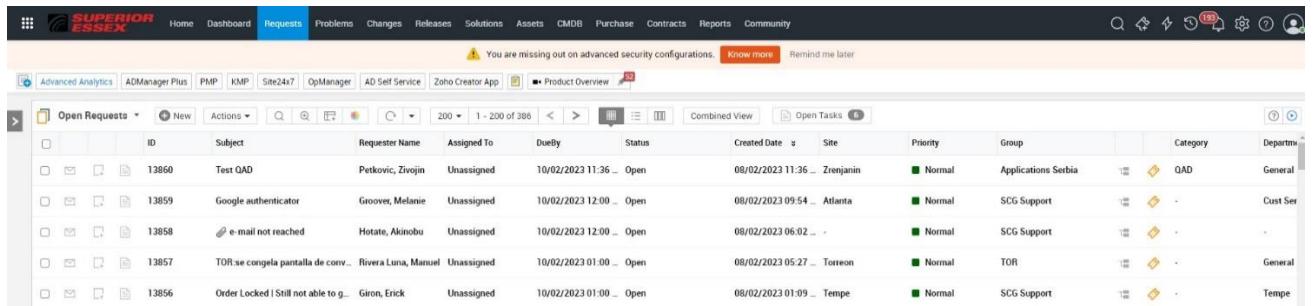
Problem & Change is an overview of the Organization's Problems & Changes

Assets is an overview of IT Helpdesk assets, software, purchase order, and contracts.

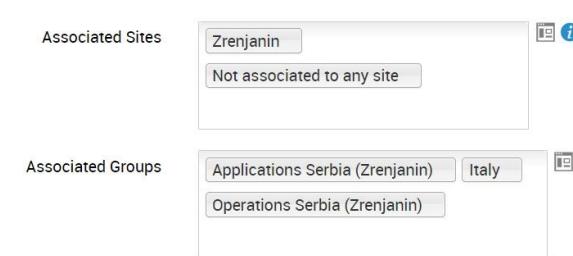


Requests

The third link in the top menu is the Requests page. It is the central page for Incident Management and the most important page for Technicians.



On this page, Technicians can see all tickets from the sites he has the right to see, and tickets not associated to any site.



For now, Technicians can see all tickets from NA because their system is not yet organized by sites, and their tickets are in the default site (meaning not associated to any site). Technicians from Europe should only respond to requests from users from European sites. In case that users want to send requests to NA global support, Technician must reroute the request. The technician must change the value for a site to Not associated to any site and to change the value for the group to Not Assigned. After that NA support can handle requests from EU users.

All requests which are marked in bold are Unassigned requests.

If the technician checks the checkbox beside the requests, he can pick -up the request.

ID	Subject	Requester Name	Assigned To	DueBy	Status	Created Date	Site	Priority	Group	Category
15165	TOR: no se pueden ver los registr...	Rivera Luna, Manuel	Unassigned	15/03/2023 01:00 ...	Open	12/03/2023 09:24 ...	Torreón	Normal	TOR	-
15164	[EXTERNAL]10.5.3.232 BFOC1ON	Moffatt, Shelly	Unassigned	14/03/2023 11:00 ...	Open	12/03/2023 08:58 ...	Brownwood	Normal	BWD	-
15163	[EXTERNAL]10.5.3.208 BFOC2N	Moffatt, Shelly	Unassigned	14/03/2023 11:00 ...	Open	12/03/2023 07:55 ...	Brownwood	Normal	BWD	-
15162	[EXTERNAL]10.5.3.208 BFOC2N	Moffatt, Shelly	Unassigned	14/03/2023 11:00 ...	Open	12/03/2023 07:53 ...	Brownwood	Normal	BWD	-

Toolbar



The toolbar offers Technicians the ability to filter tickets, to raise the request, search tickets, change the view (add columns, change colors, show more tickets on the page), take action, help videos, and legend.

1. Filtering tool

Technicians can filter what tickets they want to see: All open Requests, and Competed Requests, or create their own custom filters.

- Open Requests Actions
-
- All My Groups
- My Open Or Unassigned
- Unassigned Requests
- My Open Requests
- My Requests On Hold
- My Overdue Requests
- My Pending Requests
- My Pending Requests or Tasks
- My Requests Due Today
- All
- Incident
- Service
- Archived
- Trash

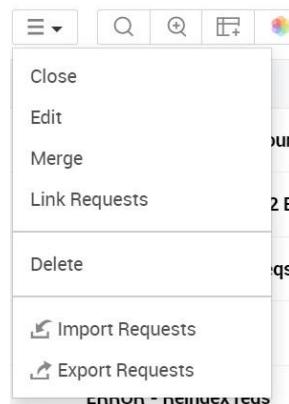
2. New request creation tool

Technicians can create requests for themselves or on behalf of some users.

The screenshot shows the 'Add request' interface. At the top, there are tabs for Home, Dashboard, Requests, Problems, Changes, Releases, Services, Assets, CMDB, Purchase, Contracts, Reports, and Community. A banner at the top right says 'You are missing out on advanced security configurations' with a 'Know more' button and a 'Remind me later' link. Below the banner, there are links for Advanced Analytics, ADMManager Plus, PMP, KMP, Site24x7, OpManager, AD Service, Zoho Creator App, and Product Overview. The main form has sections for Requester (Search Requester List), Asset(s) (Select...), Status (Open), Mode (E-Mail), Priority (Normal), Request Type (Incident), Service Category (Not Specified), Category (Not Specified), Subcategory (Not Specified), Group (SO3 Support), Technician (Not Specified), Subject (empty field), Description (rich text editor), Site (Not associated to any site), and Resolution (empty text area). Buttons at the bottom include 'Add request', 'Reset', and 'Cancel'.

3. Action tool

Technicians can perform different actions with this tool: Close a request, edit a request, to link a request to another request, and merge requests.



4. Search tool

Technician can search request by ID, Subject, Requester Name, Assigned To, Status, Site, Priority, Group, Category, and Department.

The screenshot shows a table of search results for 'Open Requests'. The columns are: ID, Subject, Requester Name, Assigned To, DueBy, Status, Created Date, and Site. There are 200 results, page 1 of 2. The first two rows are shown:

ID	Subject	Requester Name	Assigned To	DueBy	Status	Created Date	Site
12506	Promote CQ "mfg_oee_wo"	Bozovic, Radomir	Hartman, An...	07/01/2023 12:00 ...	Open	05/01/2023 01:18 ...	-
11830	scheduled job: CQ "mfg_oee_sipl...	Bozovic, Radomir	Eke, Giles C...	14/12/2022 12:00 ...	Open	12/12/2022 09:02 ...	-

5. Refresh button

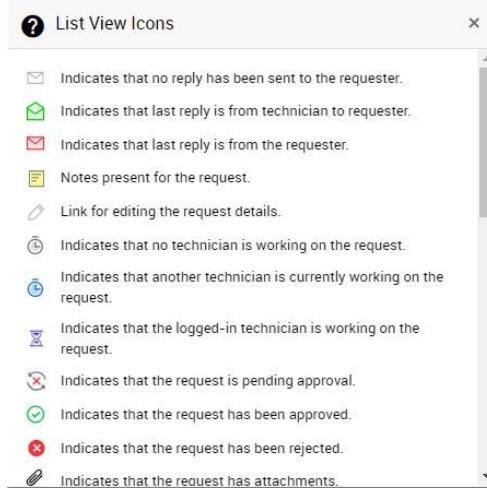
Used to refresh the page to see newly received requests.

6. Open Tasks button

The technicians can see all open tasks.

7. Legends

The legends button shows to technicians the meaning of all signs that they see on the page.



8. Help Videos

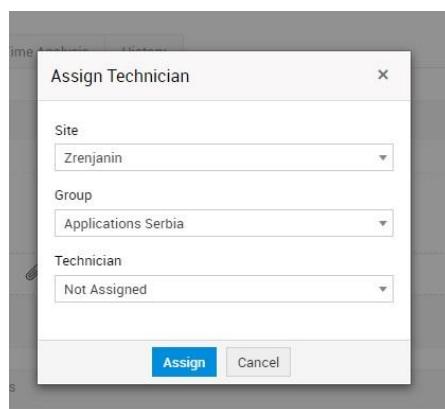
There Technicians can find all video tutorials.

The technician can perform basic actions on requests in the table of requests.

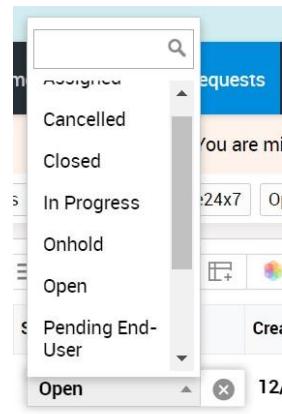
ID	Subject	Requester Name	Assigned To	DueBy	Status	Created Date	Site	Priority	Group	Category	Department
13860	Test QAD	Petkovic, Zivojin	Unassigned	10/02/2023 11:36 ..	Open	08/02/2023 11:36 ..	Zrenjanin	Normal	Applications Serbia	QAD	General

Values in the fields for columns Assign to, Status, and Group can be changed by pressing an arrow in the fields.

By clicking on the arrow in the fields Assigned to, and Group technician can change the value for the site, Group, and assign the request to the technician.



By clicking on the arrow in the field Status technicians can change the status of the request



By clicking on the field Subject Technician is entering the Request page where he can see request details and manage request

Request page

The request page is the main place to manage individual requests

The screenshot shows the Zoho Creator Request page. On the left, a sidebar lists several open requests, each with a subject, due date, requester, and a small preview icon. The main area displays a detailed view of request #13860. The top navigation bar includes links for Home, Dashboard, Requests, Problems, Changes, Releases, Solutions, Assets, CMDB, Purchase, Contracts, Reports, and Community. Below the navigation is a search bar and a message about missing security configurations.

Request Details:

- Subject:** #13860 Test QAD
- DueBy Date:** 10/02/2023 11:36 AM
- Requester:** Petkovic, Zivojin
- Description:** To: superhelpp@spsx.com
Please Test this information about QAD User review.
- Attachments:** Browse Files or Drag files here [Max size: 10 MB]
- Actions:** Reply, Forward, Recommended Template
- Conversations:** No Conversations

Properties:

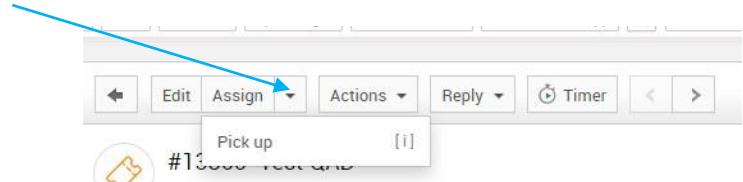
Status	Open	Request Type	Incident
Mode	E-Mail	Service Category	Not Assigned
Priority	Normal	Category	QAD
Group	Applications Serbia	Subcategory	Not Assigned
Site	Zrenjanin	Technician	Not Assigned
Asset(s)	zrol-epetkoz.srb.eu.spzx.com	Created By	System
Department	General	SLA	Normal SLA
Template	Default Request	Created Date	08/02/2023 11:36 AM
Scheduled Start Time	-	Scheduled End Time	-
DueBy Date	10/02/2023 11:36 AM	Response DueBy Time	08/02/2023 03:36 PM
Last Update Time	-		

User Profile:

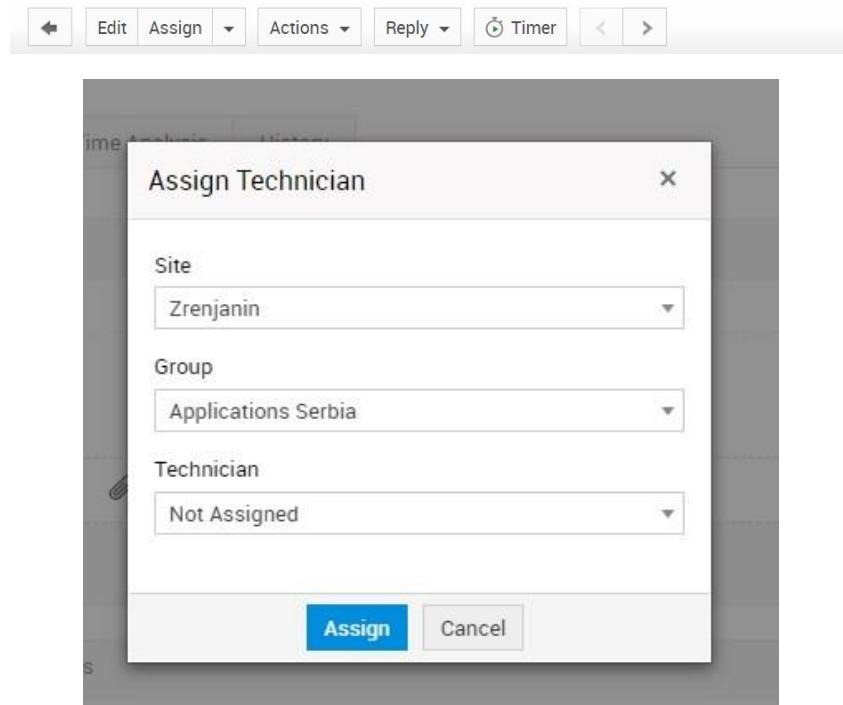
- Petkovic, Zivojin (zivojin.Petkovic@spzx.com)
- Requests (1) | Assets
- Employee ID: -
- Department Name: General, Zrenjanin
- Phone: -
- Business Impact: -
- Job title: -
- Reporting To: -
- Mobile: -

At the bottom right are icons for Chats, Technician, Groups, and Help.

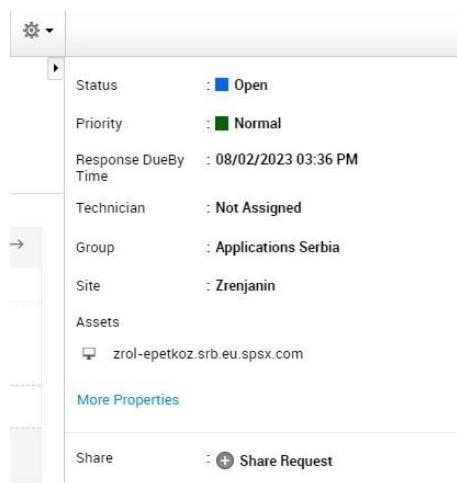
Technicians can assign requests to themselves by clicking on the arrow right from the Assign button and choosing Pick up.



By choosing the Assign button technician can change Site, Group, and Technician for the request.



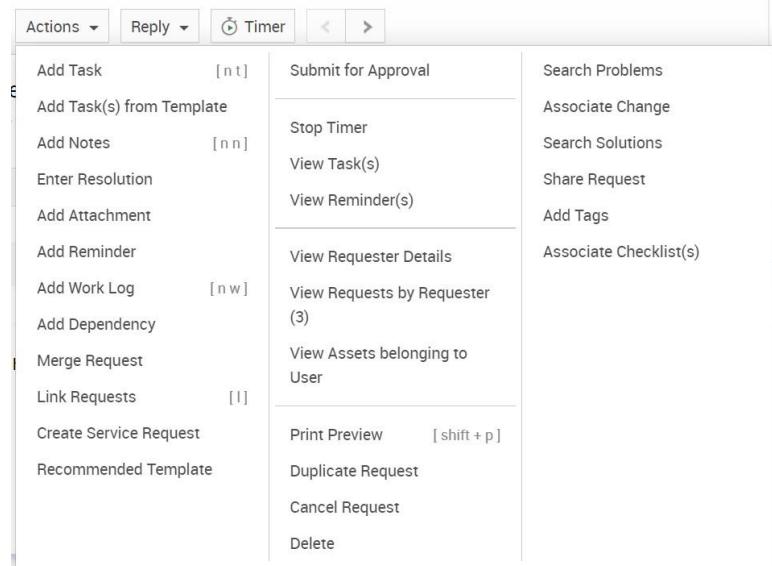
Or to change values in the fields on the right side of the request page.



Technicians can also change those values in the Properties part of the Request page.

Properties		Edit	
Status	Open	Request Type	Incident
Mode	E-Mail	Service Category	Not Assigned
Priority	Normal	Category	QAD
		Subcategory	Not Assigned
Group	Applications Serbia	Technician	Not Assigned
Site	Zrenjanin [i]		
Asset(s)	zrol-epetkoz.srb.eu.spssx.com [i]	Created By	System
Department	General	SLA	Normal SLA
Template	Default Request	Created Date	08/02/2023 11:36 AM
Scheduled Start Time	-	Scheduled End Time	-
DueBy Date	10/02/2023 11:36 AM	Response DueBy Time	08/02/2023 03:36 PM
Last Update Time	-		

Technicians can also take other actions by clicking on the Action button



Through this page, Technician can communicate with the requester. By Clicking on the button reply technician can send a message to the requester.

When the requester replies on mail from the technician little red letter sign will be created on the request.

Technicians can read and reply to this message from users on the request page. After that, this letter sign will become green.

The screenshot shows the Zoho Creator Request Management interface. At the top, there's a navigation bar with links like Advanced Analytics, ADManager Plus, PMP, KMP, Site2x7, OpManager, AD Self Service, Zoho Creator App, and Product Overview. Below the navigation is a search bar and a toolbar with various icons. The main area displays a list of 'Open Requests' in a grid format. Each row contains columns for ID, Subject, Requester Name, Assigned To, DueBy, Status, Created Date, Site, Priority, Group, Category, and Department. A blue arrow points to the 'Actions' dropdown menu for request 14476. To the right of the list, there's a detailed view of a specific request (ID 13860) with its subject 'Test QAD'. The view includes the requester's name (Petkovic, Zivojin), assigned technician (Lazovic, Caslav), due date (10/02/2023 11:36 PM), status (Open), and priority (Normal). It also shows the request's history, including a recent reply from Lazovic, Caslav at 08/02/2023 11:48 AM. On the far right, there's a sidebar for 'Tags' and 'Employee ID' information for the requester.

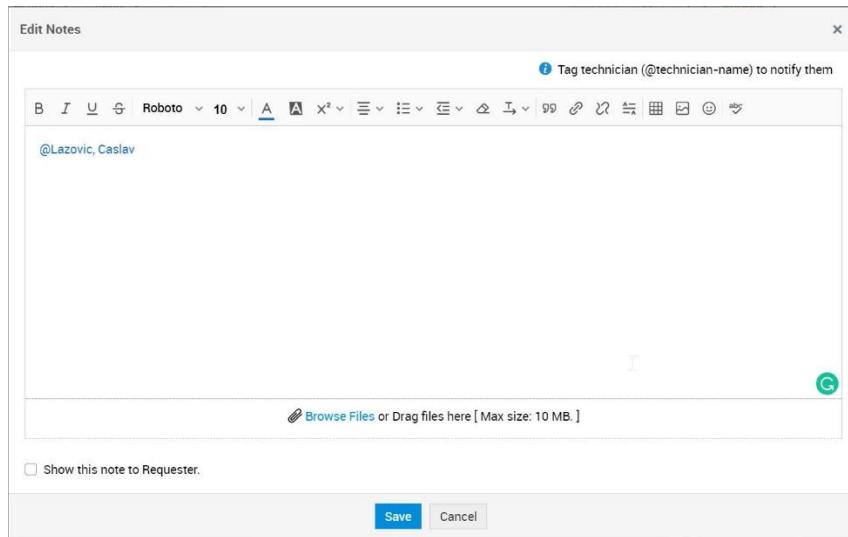
Also, in situations when technicians need consultation or help from other technicians or outside support, he can forward the requester's mail to them. Technicians or supervisors can create a note about requests.

This screenshot shows the same Zoho Creator interface as above, but with a focus on a note creation dialog. A blue arrow points to the 'Add Note' button in the toolbar. The dialog box is titled '#14525 - Add Notes' and contains a rich text editor with various formatting options. Below the editor is a file upload section with the placeholder 'Browse Files or Drag files here [Max size: 10 MB.]'. At the bottom of the dialog, there are two checkboxes: 'Show this note to Requester.' and 'Consider notes addition as first response'. There are also 'Save' and 'Cancel' buttons. The background shows the list of open requests, with rows for requests 14476 and 14475 visible.

It is sometimes very useful to write some notes about your work or about the work of other technicians.

This screenshot shows the note creation dialog from the previous image. The dialog is titled '#14525 - Add Notes' and contains a rich text editor with various formatting options. Below the editor is a file upload section with the placeholder 'Browse Files or Drag files here [Max size: 10 MB.]'. At the bottom of the dialog, there are two checkboxes: 'Show this note to Requester.' and 'Consider notes addition as first response'. There are also 'Save' and 'Cancel' buttons. The background shows the list of open requests, with rows for requests 14476 and 14475 visible.

The technician or supervisor can send a message to the other technicians by tagging them (@tecnica_name) in the notes.



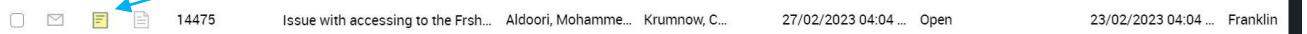
The technician tagged in the note will receive mail about that.

A screenshot of an email notification. The subject line reads: 'Dabic, Igor has mentioned you in a Note in Request 'QAD Issues: Other - I will li...'. The email is from 'SuperHelp' to 'Lazovic, Caslav'. It includes standard reply buttons ('Thank you!', 'Ok, thanks.', 'Got it, thanks!') and a feedback link. The body of the email says: 'Hello,' and 'Dabic, Igor has mentioned you in a note in Request QAD Issues: Other - I will list in description.' A 'Note:' section shows the original note content: 'Having connectivity issues with the UPS station'. Below the note, there's a link to 'https://superhelp.spsx.com/WorkOrder.do?woMode=viewWO&woID=14535&PORTALID=1'.

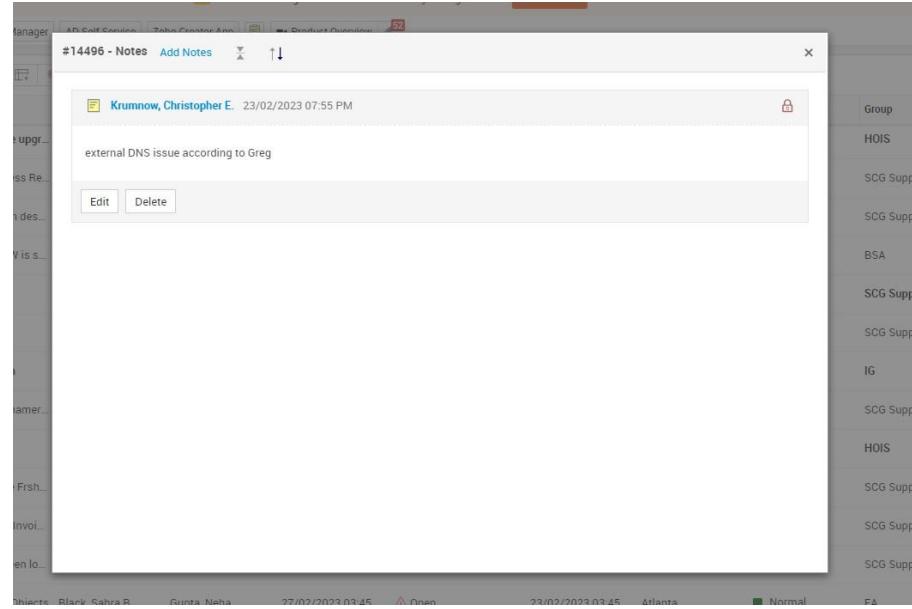
If the technician checks the option Show this note to Requester status of the note will change from private to public. When the status of the note is public technicians and requesters can see the note, otherwise, if the status is private, only technicians can read the note.

A screenshot of the 'Edit Notes' window. The note content is identical to the previous one: 'Having connectivity issues with the UPS station'. The 'Show this note to Requester' checkbox is checked, making the note public. The note is listed in a conversation sidebar with messages from 'Kraunow, Christopher E.' and 'Martinez, Luis C.'.

When the note is created yellow paper sign will be created on the request.

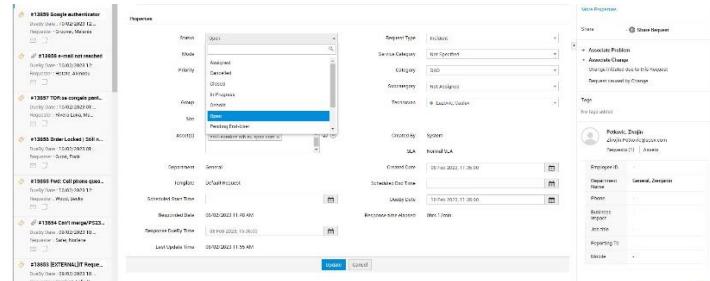


When the technician clicks on that sign, he can read the note.



After the technician fulfills requests from users, he can close the request (ticket).

To close the request, the technician must change the Status of the request from Open to Close.



But before he can close the request, the technician must fill Category, Service Category, and Resolution fields in the request properties.

After that on the request page, we can see the green sign Close.

On the Resolution tab of the request page, technicians can see detailed information about the steps which was needed to be done to fulfill the request.

On the tab Tasks, we can see if there were some tasks that the technician must fulfill before he closes the ticket.

On the History tab, we can follow the life cycle of the request.

The screenshot shows the Zoho Creator interface with the 'Requests' tab selected. A message at the top indicates 'You are missing out on advanced security configurations'. The main area displays a list of open requests, with one request (#13860) expanded to show its details and history. The 'History' tab is active, showing a timeline of events:

- 01:54 PM: Closed by Lazovic, Caslav. Status changed from Open to Closed.
- 01:51 PM: Seen by Lazovic, Caslav. ISREAD changed from false to true.
- 01:50 PM: Applied Response Prediction by System. An Zia prediction is unavailable, request reopening has been processed per the self-service portal settings.
- 01:50 PM: Updated by System. ISREAD changed from true to false. ReOpened changed from false to true.

On the right side, detailed information about the request is shown, including status, FCR, priority, response due date, technician, group, site, assets, and more properties. Buttons for share, associate problem, associate change, and tags are also present.

Also, the technician can see if someone is viewing the request at the same time.

This screenshot shows the Zoho Creator interface with the 'Requests' tab selected. A message at the top indicates 'You are missing out on advanced security configurations'. The main area displays a list of open requests. One request (#13863) is expanded to show its details. On the right side of the request card, there is a red circle around a 'Share Request' button. The request details include:

- Status: Open
- Priority: Normal
- Response Due By: 08/02/2023 09:00 PM
- Technician: Wood, Becky
- Group: SOS Support
- Site: Denver
- Attachments: (1)
- Assets: dmsd-powell.ogz.spx.com

Below the request card, there is a banner for 'Customer Focused... Performance Driven'.

This screenshot shows a 'Currently Viewing' overlay window. It lists two users: 'You' (Wood, Becky) and another user. The window includes 'Start Chat' and 'Manage' buttons. Below the overlay, the main interface shows a sidebar with navigation links like 'Status', 'Priority', 'Response Time', 'Technician', 'Group', 'Site', and 'Attachments'. The 'Attachments' section shows '(1)'.

If a technician is working on a request, other technicians viewing that request will receive notifications.

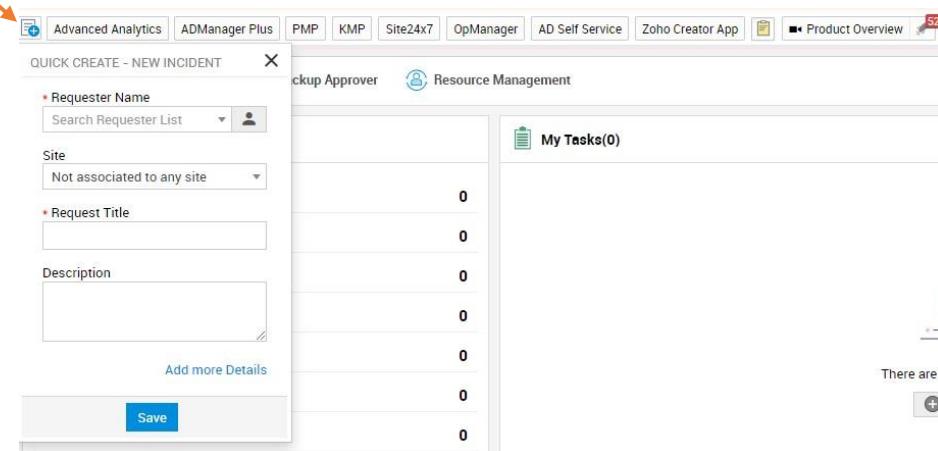
Ability to send this mail/report - with the possibility to change or add recipients - also manually.

This screenshot shows the 'Activities' module. A notification is displayed: 'Baumann, Michelle R started replying to the request 20/02/2023 04:14 PM'. The notification is associated with the user 'Jugoslovenska-ECKA' and the location 'ica bb | 23000 Zrenjanin | Serbia'.

Creating Requests

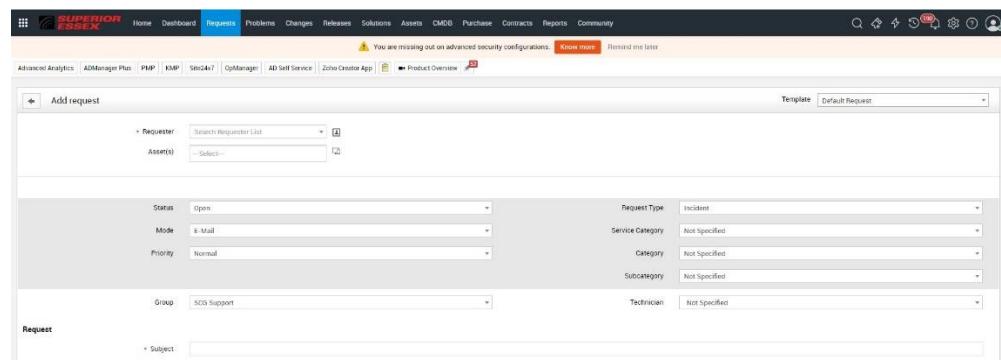
In several ways, technicians can create requests.

On every page from the Widgets zone technician can create a request by pressing the button Quick Create – New Incident



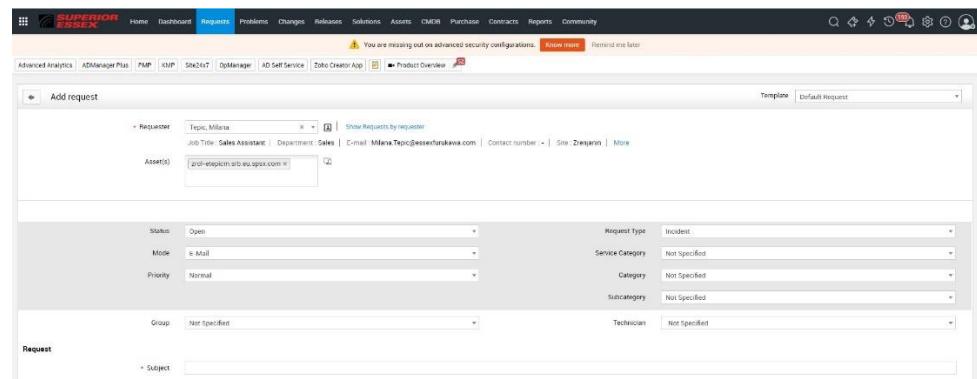
After entering Requester Name, the field Site will be automatically populated.

Technicians can also create requests from the Requesters page, by pressing the button New.



Here technician can choose also which template he wants to use. For now, we suggest using the Default template.

After entering Requester Name, technicians can see information about the user, and the field Site will be automatically populated. Technicians then choose a value for the Group field and assign the request to the appropriate technician.

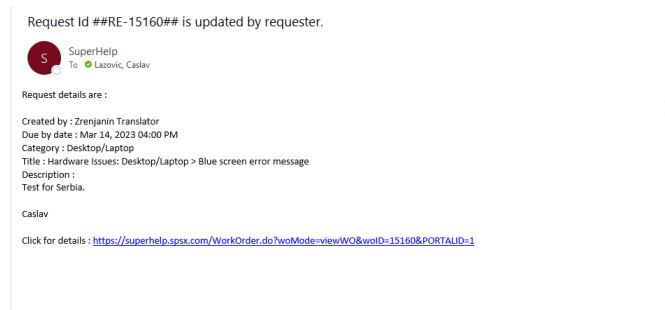


There are other ways to create a request from the top menu tools. By choosing tools New Request or Quick Actions

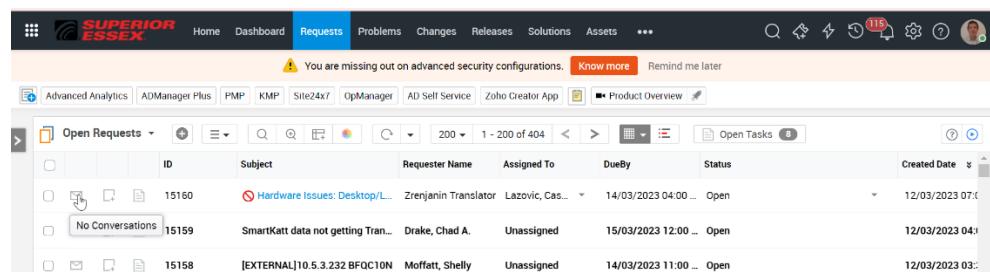


Request cancellation

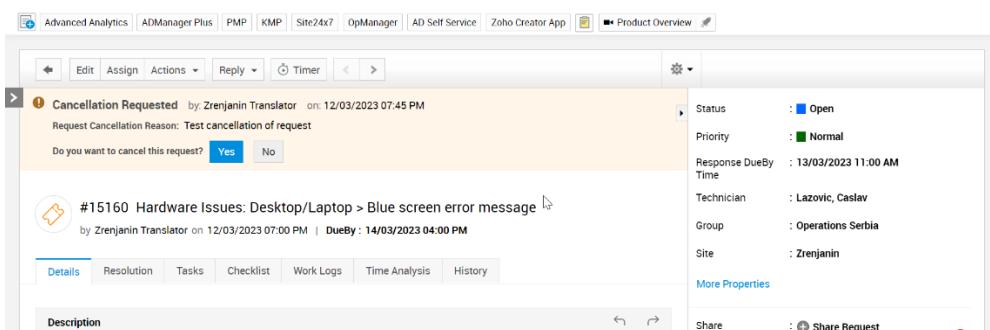
The user has the possibility to cancel his request. He can send a cancellation request for approval to the technician. The Technician will get a mail notification.



On the Requests page, the technicians will see the user's request marked with a cancellation mark.



On the request detail page, the technician has the option to approve or reject a cancellation request.

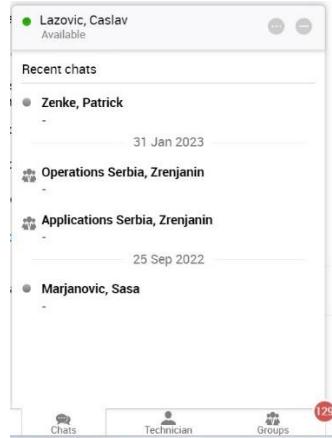


Footer

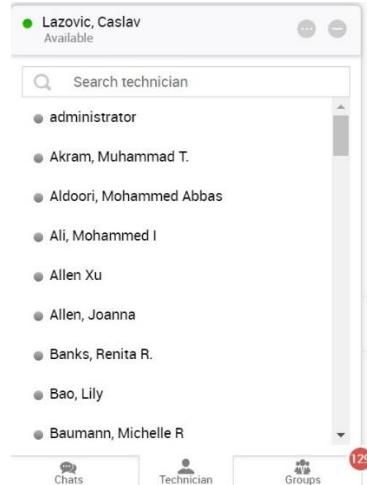
In the footer, there are tools for communication between Technicians.



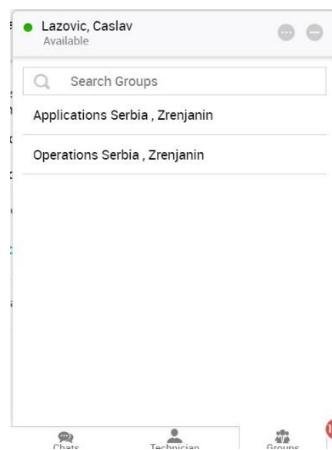
In the chat tool, the technician can see his chat history.



In the Technician tool, the technician can search for other technicians, see their online status and send them messages.



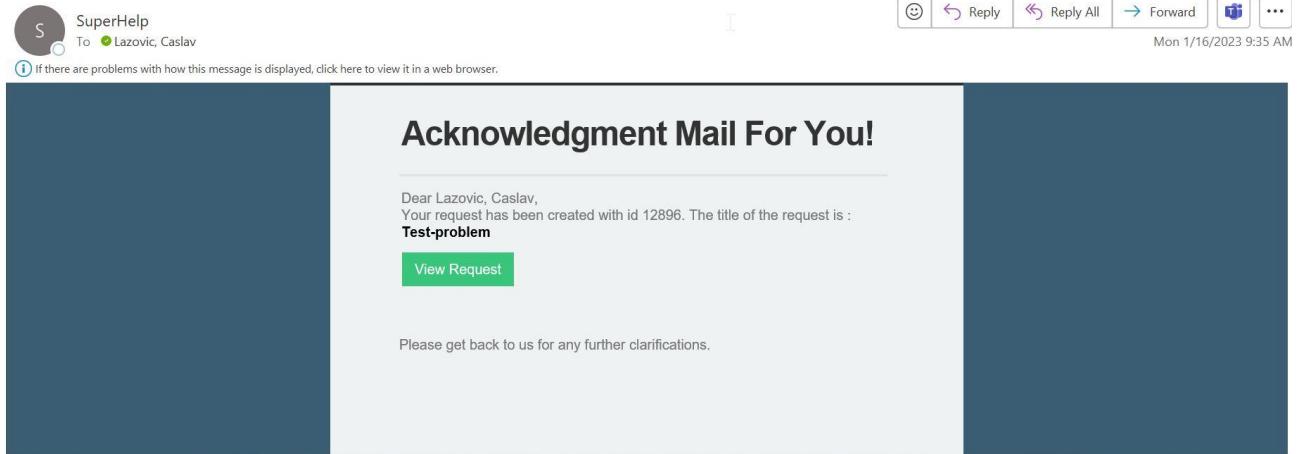
In Groups tool, the technician can search his group and send messages to all members of the group.



E-mail notifications

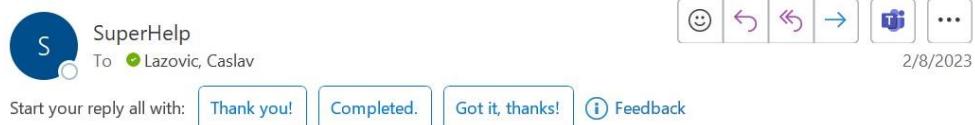
When the user or technician creates a request, the user will get a mail notification.

Your request has been logged with request id ##RE-12896##



At the same time, all technicians belonging to the support group assigned to the request will receive an email.

[Request ID :##RE-13860##] : Added to group Applications Serbia



Click for details : <https://superhelp.spssx.com/WorkOrder.do?woMode=viewWO&woID=13860&PORTALID=1>

If the request is not assigned to any support group, the requester and technicians will not receive notification mail.

When a request is assigned to the technician, he will receive notification mail.

Request Id ##RE-14535## has been assigned to you

SuperHelp
To Lazovic, Caslav

Start your reply all with: [Thank you!](#) [Got it, thanks!](#) [Received, thank you.](#) [Feedback](#)

Fri 12:02 PM

Request details are :

Requested by : Zrenjanin Translator
Created by : Zrenjanin Translator
Due by date : Feb 28, 2023 11:16 AM
Category : QAD
Title : QAD Issues: Other - I will list in description
Description :
This is the test. QAD

Caslav

Click for details : <https://superhelp.spsx.com/WorkOrder.do?woMode=viewWO&woID=14535&PORTALID=1>

When someone tags the technician in a note, the technician will receive mail:

Dabic, Igor has mentioned you in a Note in Request 'QAD Issues: Other - I will li...

SuperHelp
To Lazovic, Caslav

Start your reply all with: [Thank you!](#) [Ok, thanks.](#) [Got it, thanks!](#) [Feedback](#)

Fri 12:02 PM

Hello,

Dabic, Igor has mentioned you in a note in Request **QAD Issues: Other - I will list in description**.

Note:
[@Lazovic, Caslav](#)

Refer the Request for more details : <https://superhelp.spsx.com/WorkOrder.do?woMode=viewWO&woID=14535&PORTALID=1>

When a requester replies to the technician's mail, the technician receives this mail:

Request Id ##RE-13860## is appended with requester reply.



Request details are :

Created by : Petkovic, Zivojin
Due by date : Feb 10, 2023 05:36 AM
Category : QAD
Title : RE: [Request ID :##RE-13860##] : Test QAD
Description :

I need to Sasa get this

If the requester re-opens the request, the technician will receive a notification.

Request ID :##RE-13860## has been Re-Opened by the user.



SuperHelp

To ● Lazovic, Caslav



2/8/2023

Start your reply all with: [Thank you!](#) [I confirm.](#) [It works! Thank you!](#) [Feedback](#)

Request [ID:13860] has been Re-Opened by the user.

Title : Test QAD

Description :

Please Test this information about QAD User review.

Resolution is :

Everything is OK