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.

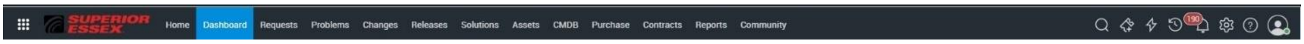
To access Essex Furukawa's ServiceDesk Plus service follow the link:

https://superhelp.spsx.com/

Page organization

Every page on this service has four zones.:

Top menu – first zone



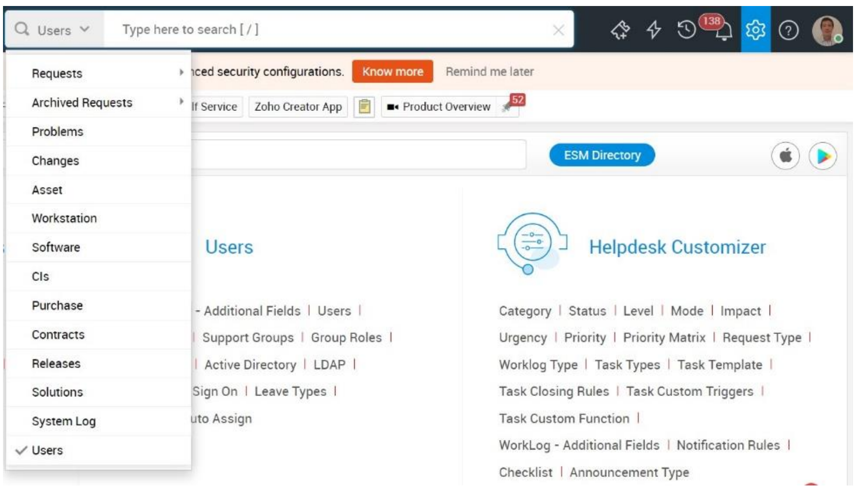
Links in the Top menu zone are giving you access to the all feature of ServiceDesk+ applications.

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.

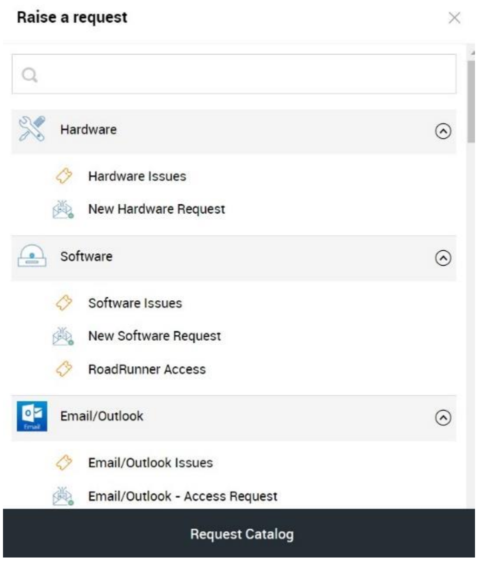
1. Search tool

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

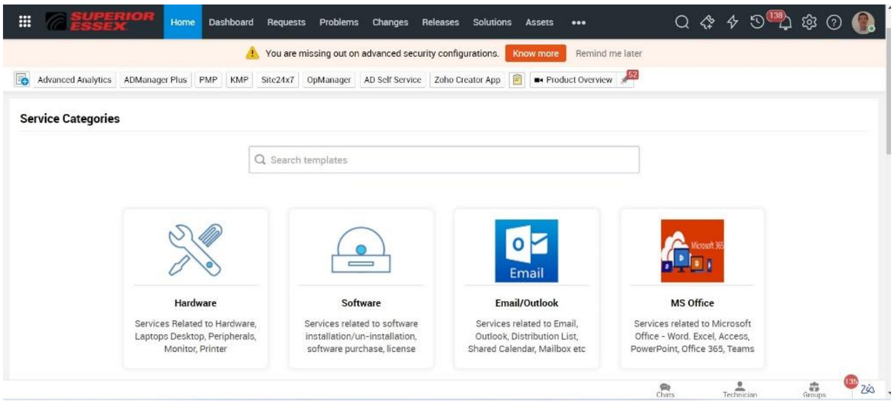


2. New Request

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.

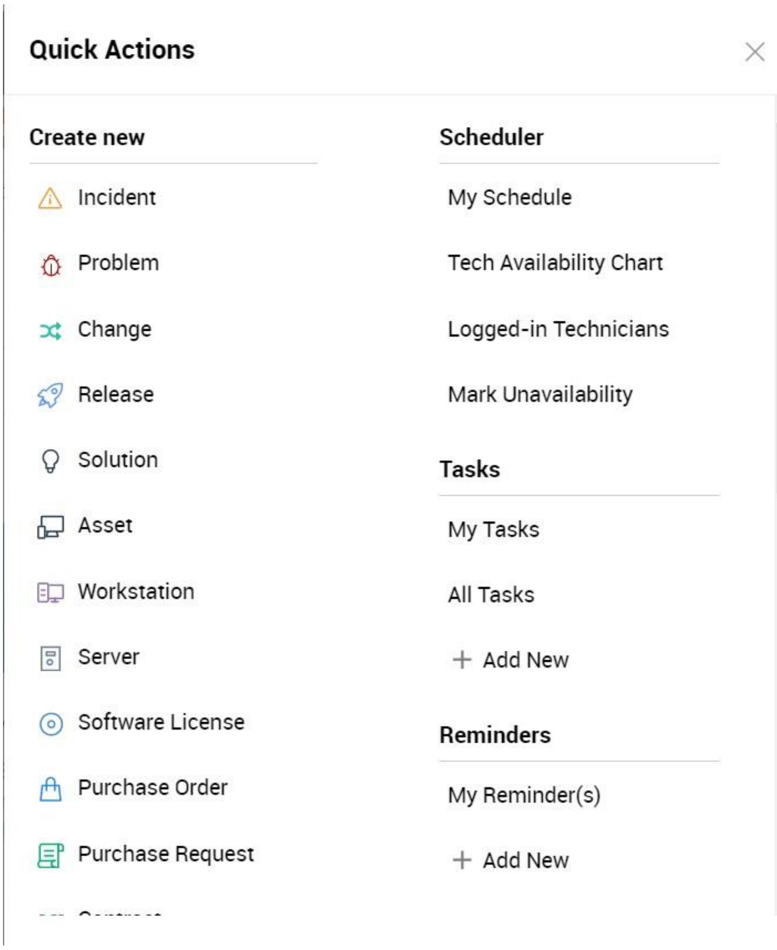


By choosing Request Catalog technician will be sent to the Service Category page. All users have access to this page when they login to superhelp.spsx.com.



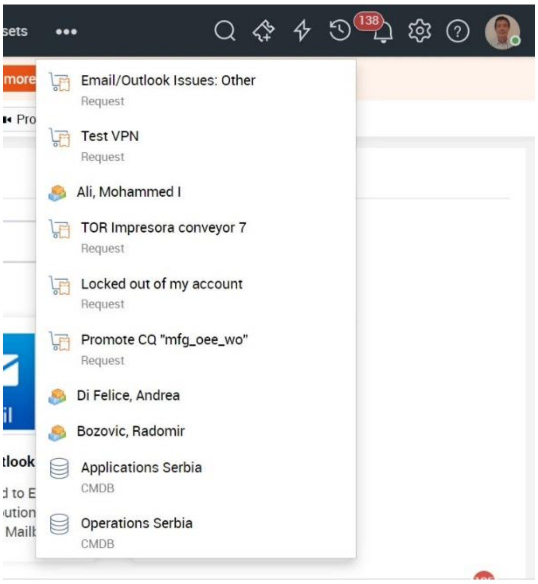
3. Quick Actions

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.



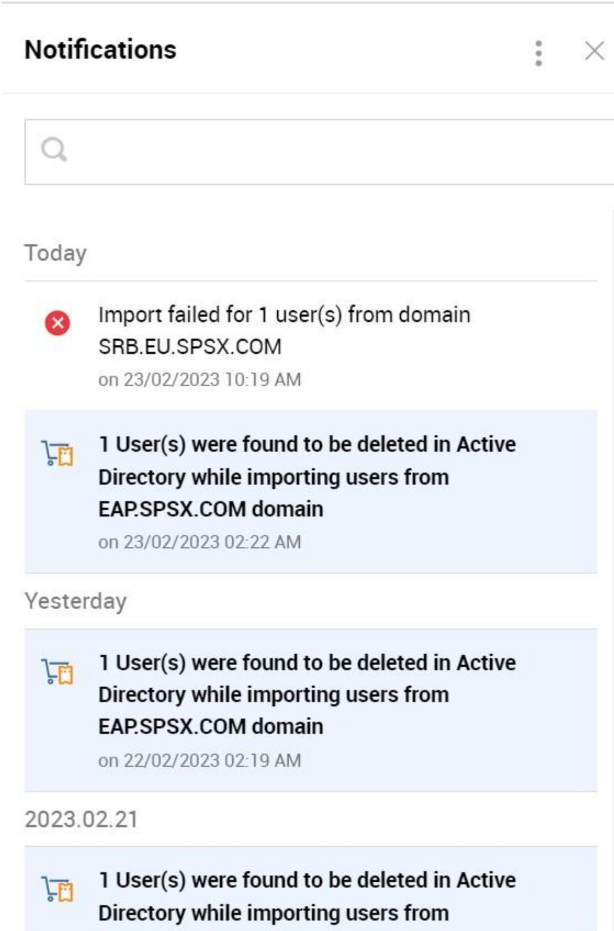
4. Recent Items

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



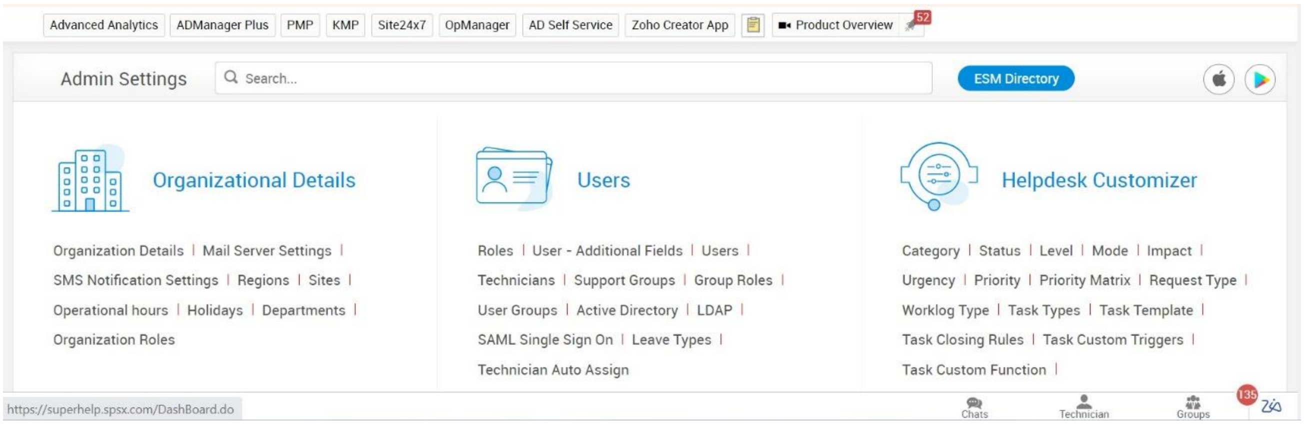
5. Notifications

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



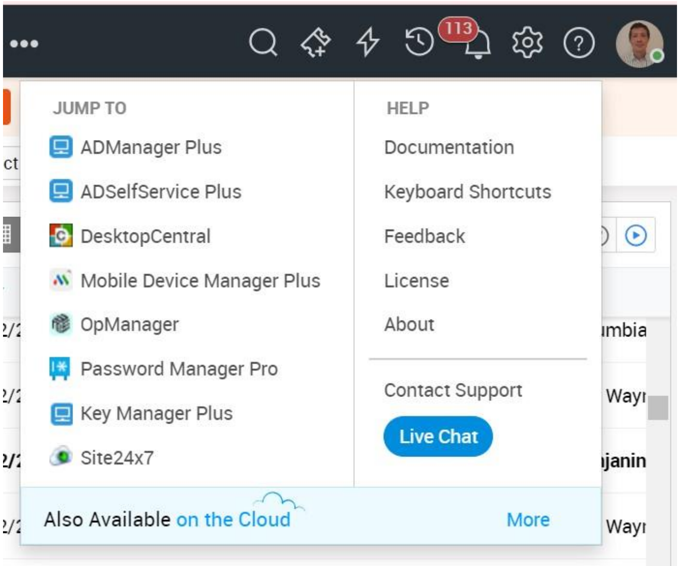
6. Admin

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.



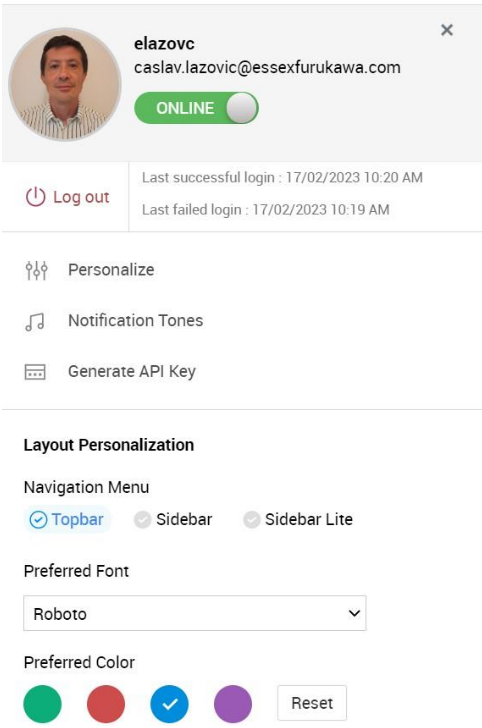
7.Help

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

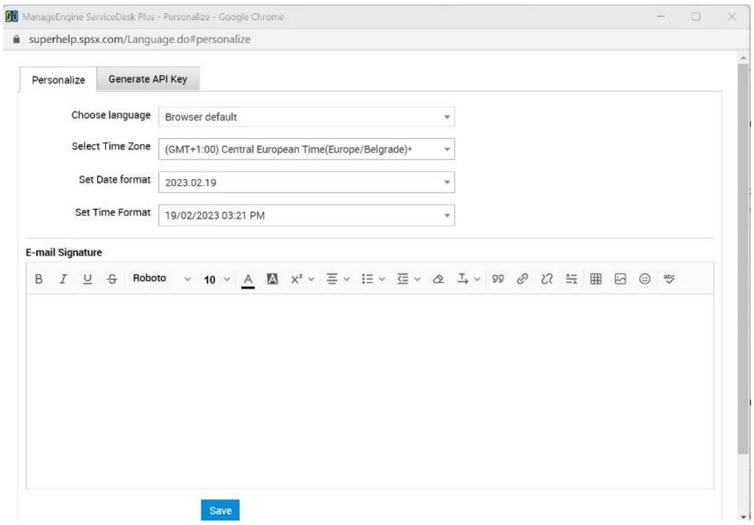


8. User profile

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



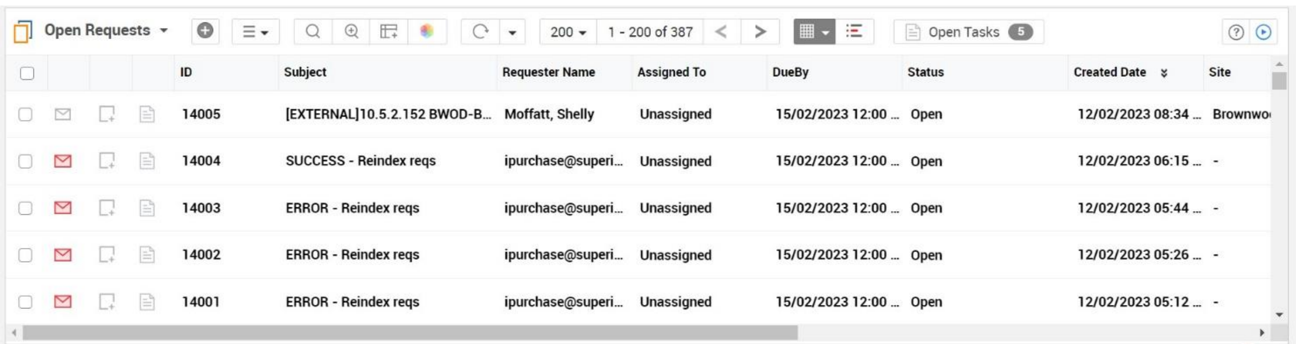
On the Personalize page technicians can change the time zone, date/time format, and language.



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



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@spsx.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.

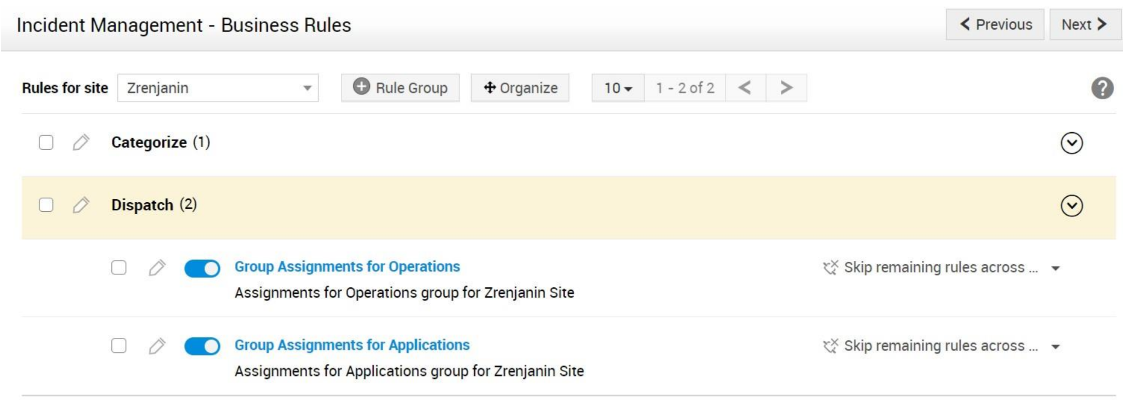
Zrenjanin site support groups members:

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@spsx.com or by creating requests on the portal https://superhelp.spsx.com/ can be only assigned to one of these groups.

Ticket routing is done by Incident Management - Business Rules.



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.

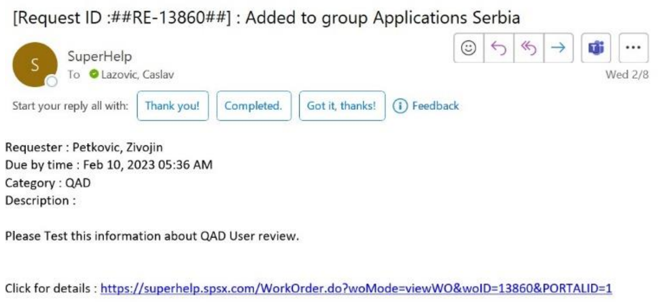
If the e-mail or request doesn’t contain any of those words next rule will be executed.

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.

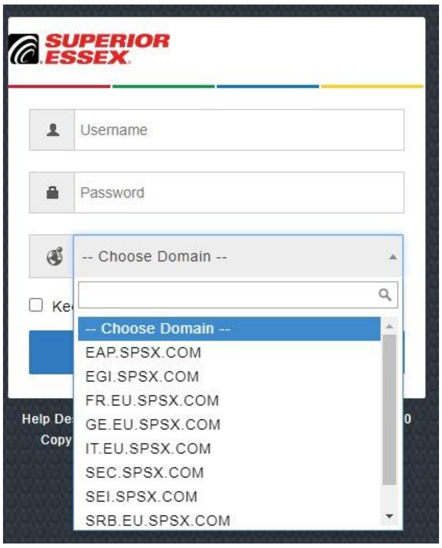
When a ticket is associated with the group all technicians from that group will get an e-mail notification.



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

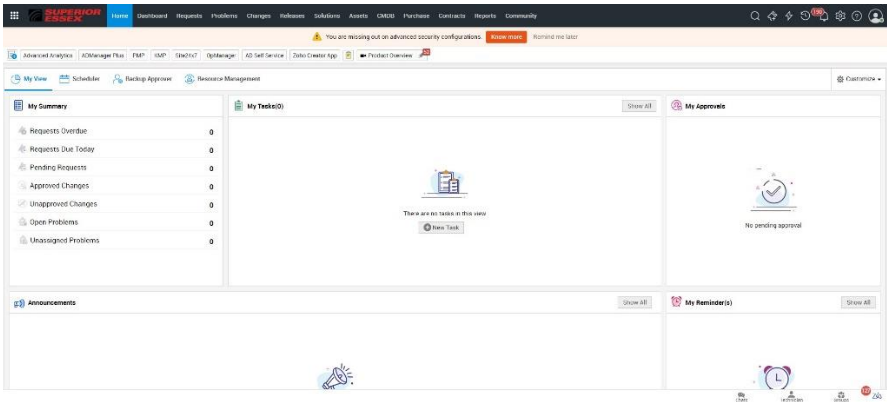
To access all functionalities of ServiceDesk Plus first you must log in:



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.

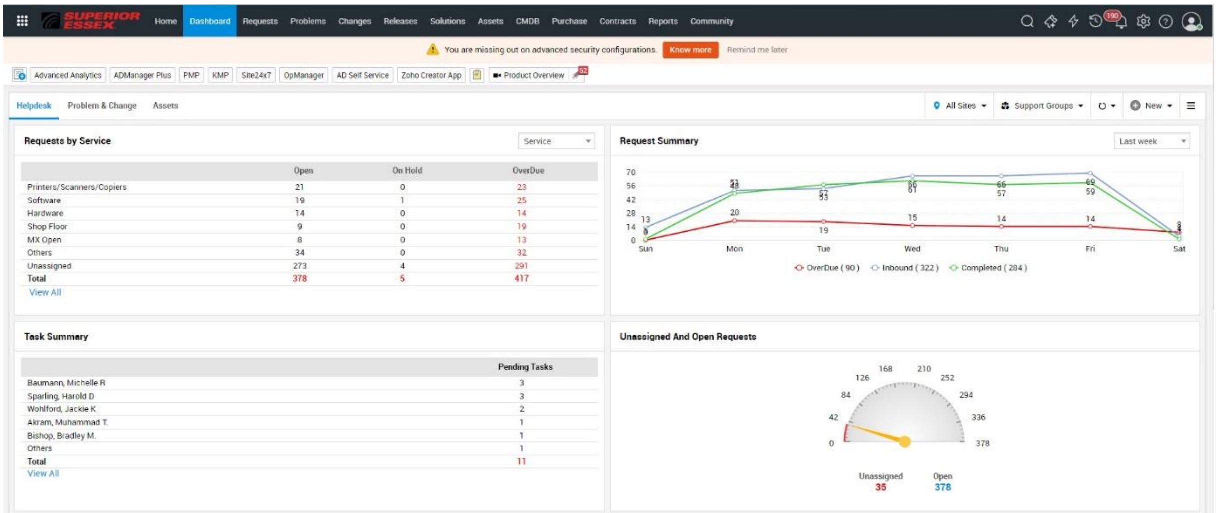


Home page for Technicians is a personal technician dashboard. It is customizable and it is completely different from the common user's Home page. There he can see things related to his work.

Dashboard

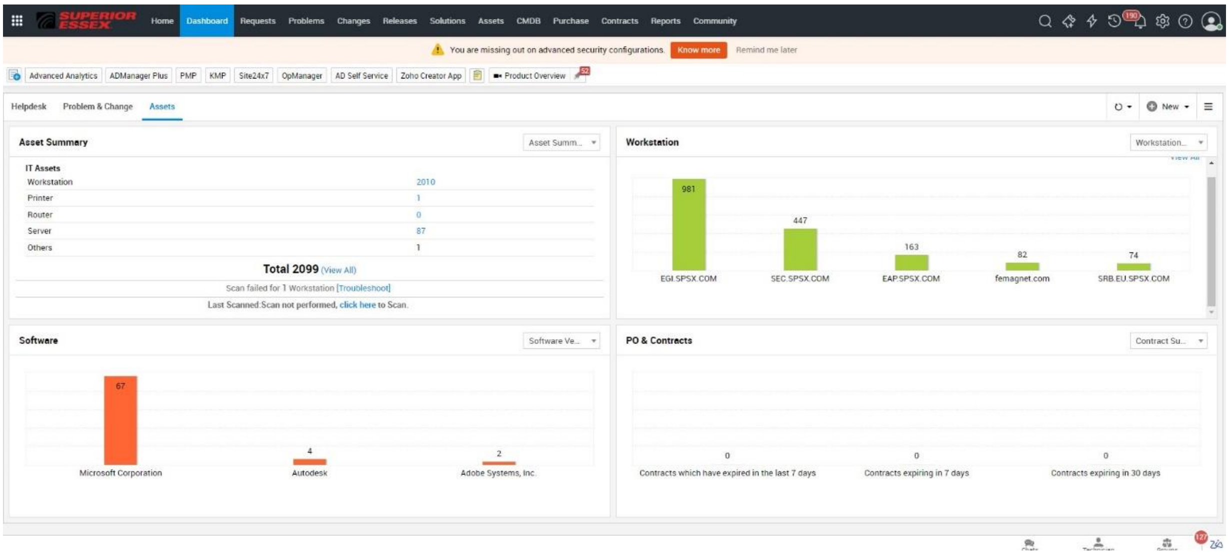
The second link in the top menu is the Dashboard page. On the Dashboard page, Technician can see the information on the ServiceDesk Plus statistic. This page has a submenu with links: Helpdesk, Problem & Change, and Assets.

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



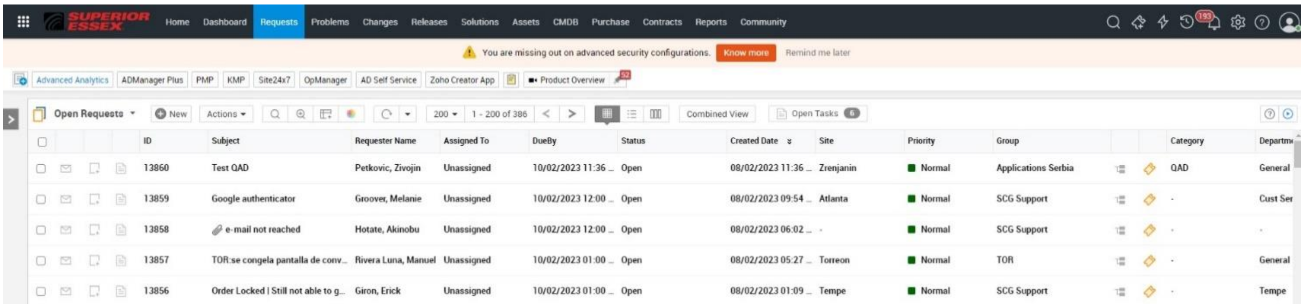
Problem & Change is an overview of the Organization's Problems & Changes

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

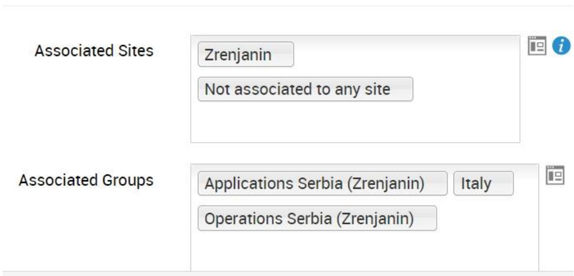


Requests

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.



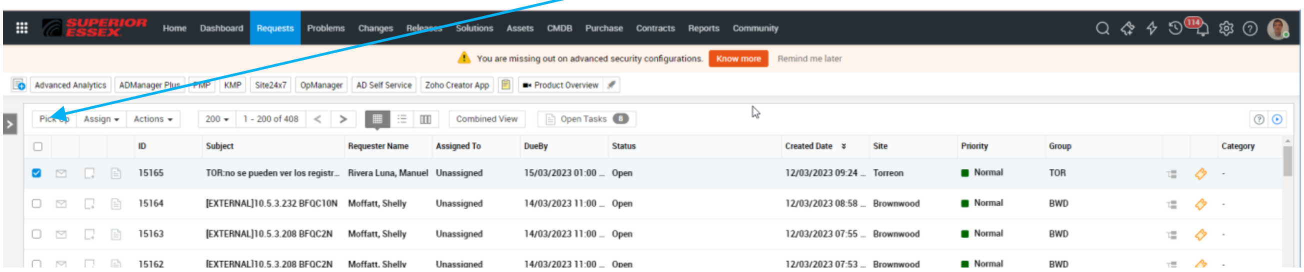
On this page, Technicians can see all tickets from the sites he has the right to see, and tickets not associated to any site.



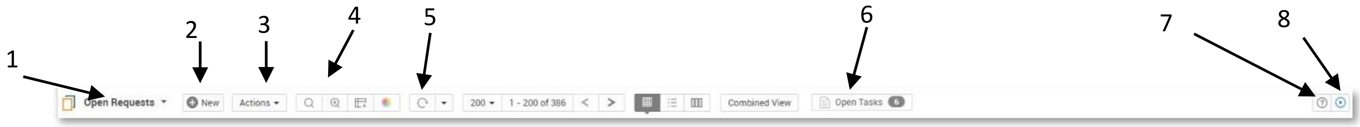
For now, Technicians can see all tickets from NA because their system is not yet organized by sites, and their tickets are in the default site (meaning not associated to any site). Technicians from Europe should only respond to requests from users from European sites. In case that users want to send 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.



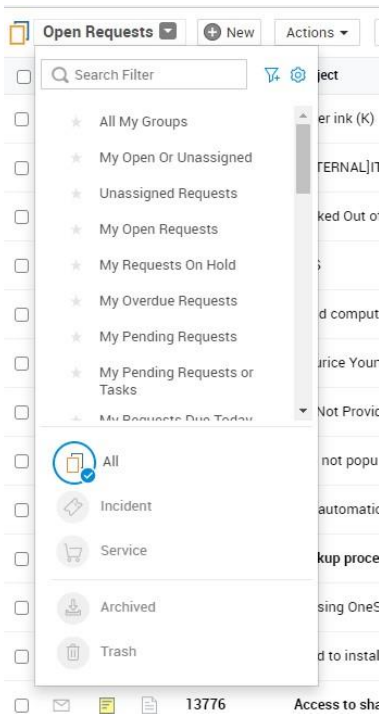
Toolbar



The toolbar offers Technician 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.

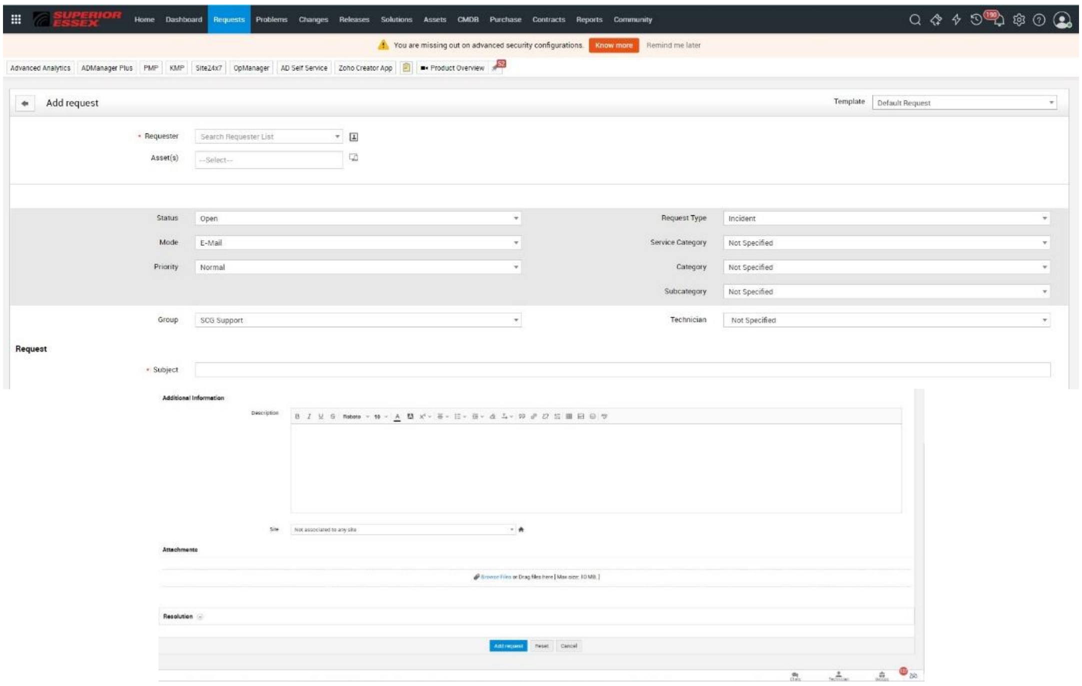
1. Filtering tool

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



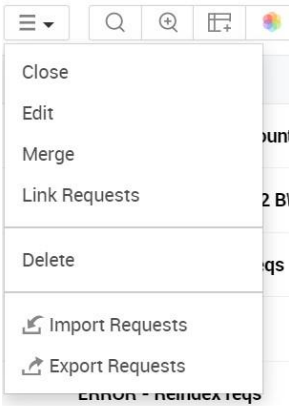
2. New request creation tool

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



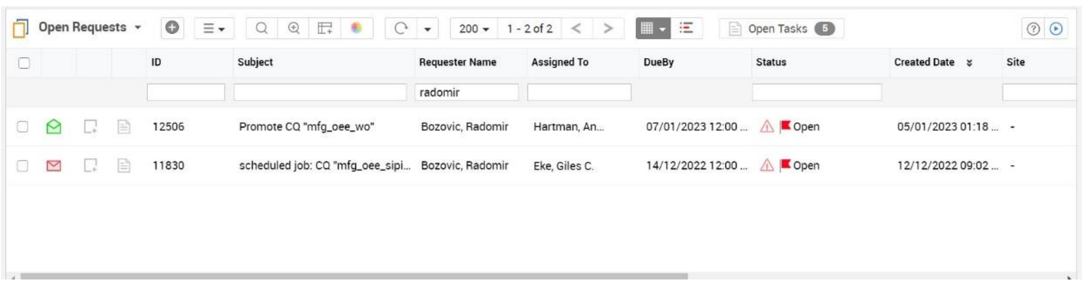
3. Action tool

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.



5. Refresh button

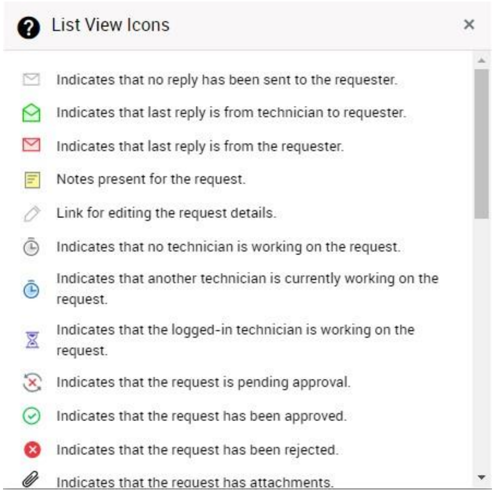
Used to refresh the page to see newly received requests.

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.



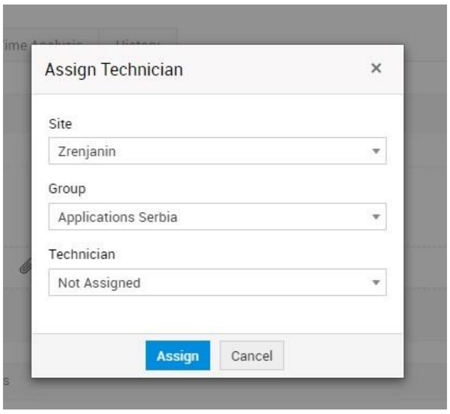
8. Help Videos

There Technicians can find all video tutorials.

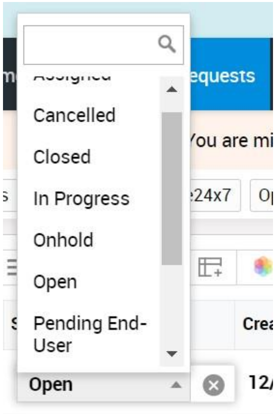
The technician can perform basic actions on requests in the table of requests.

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.



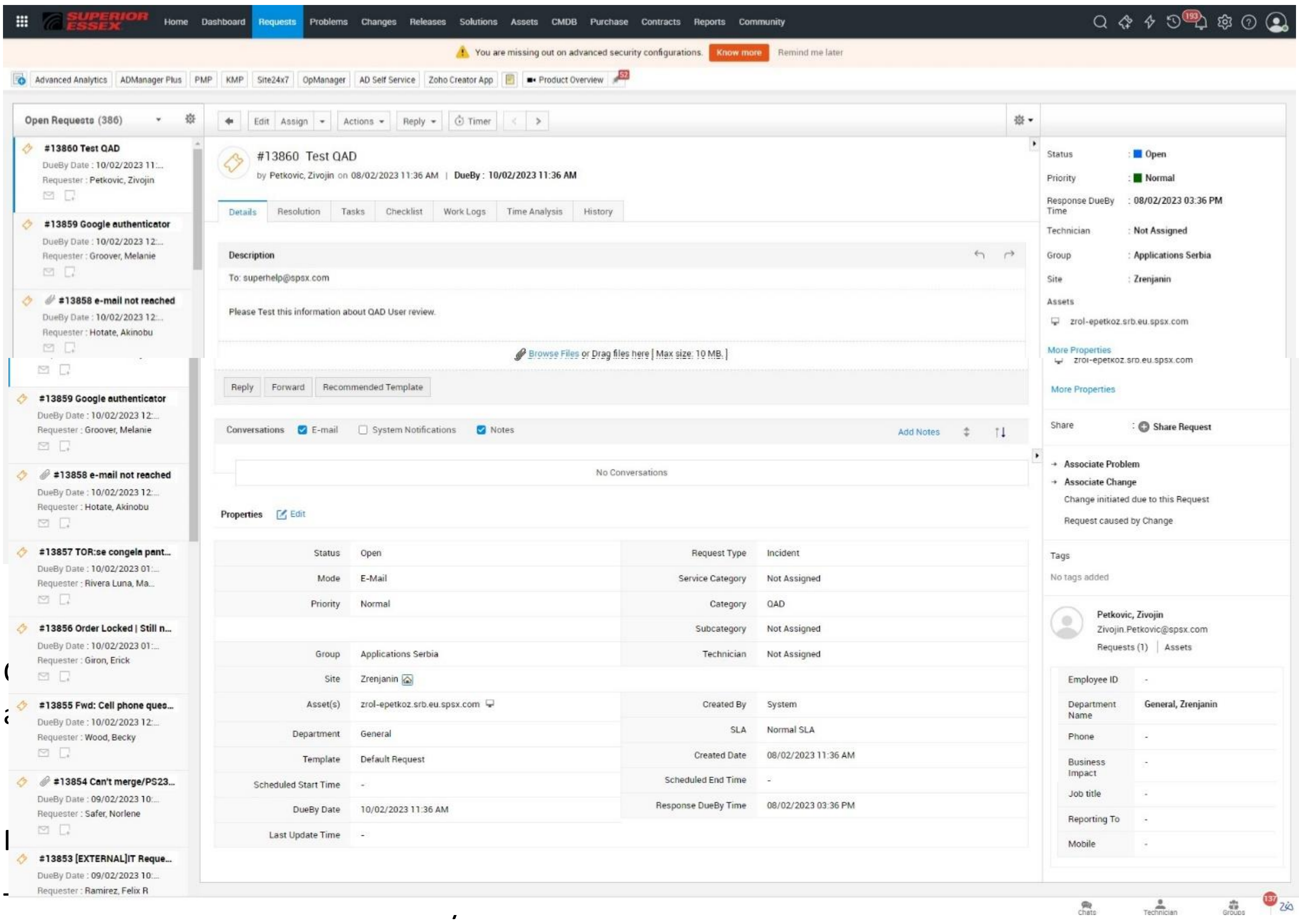
By clicking on the arrow in the field Status technicians can change the status of the request



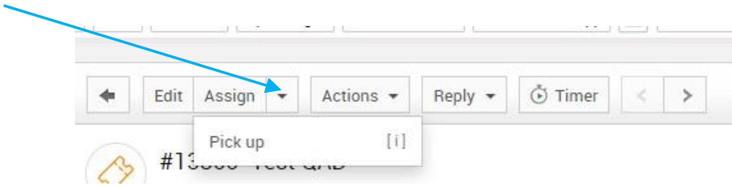
By clicking on the field Subject Technician is entering the Request page where he can see request details and manage request

Request page

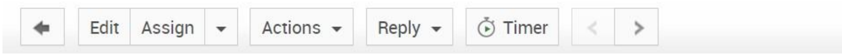
The request page is the main place to manage individual requests

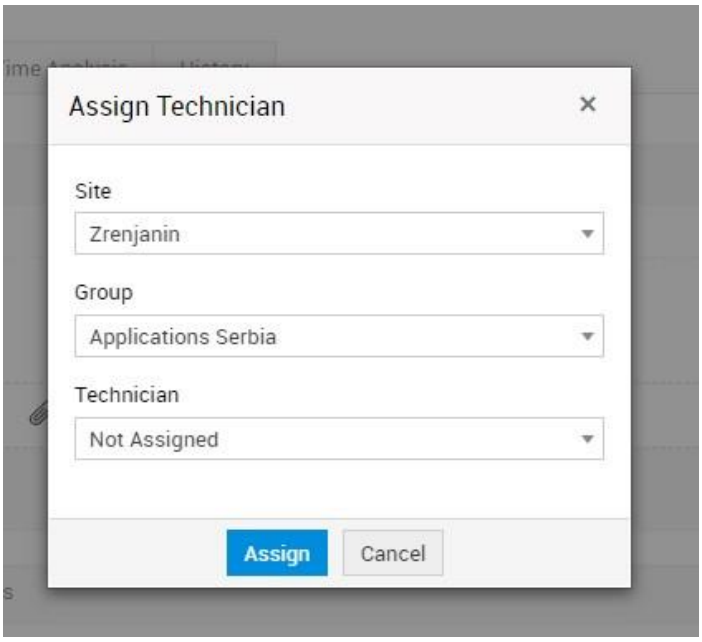


Technicians can assign requests to themselves by clicking on the arrow right from the Assign button and choosing Pick up.

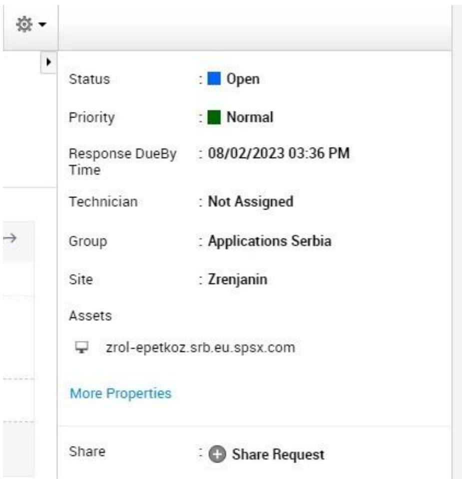


By choosing the Assign button technician can change Site, Group, and Technician for the request.

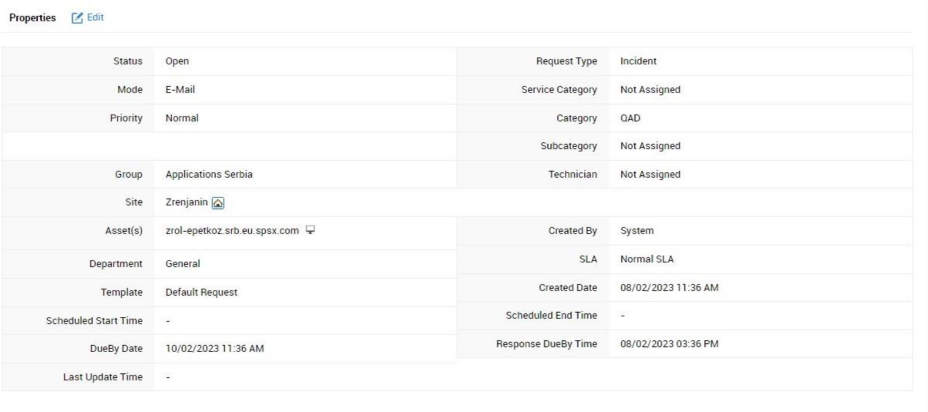




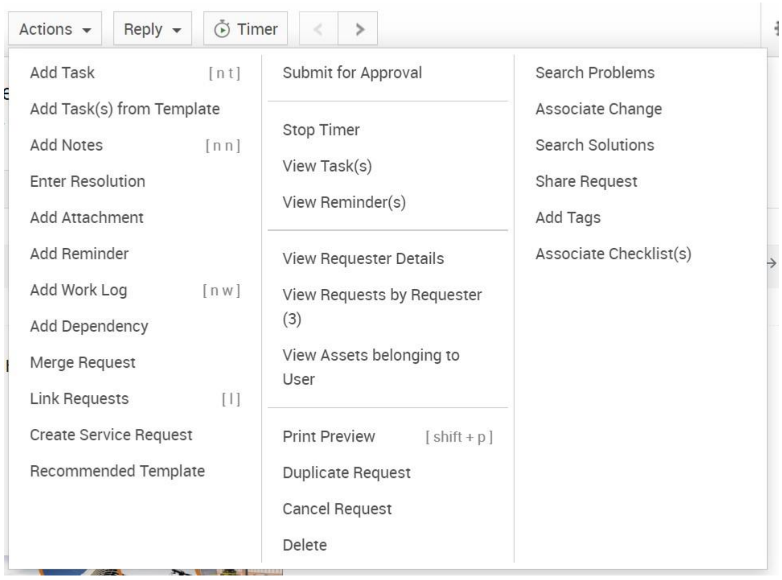
Or to change values in the fields on the right side of the request page.



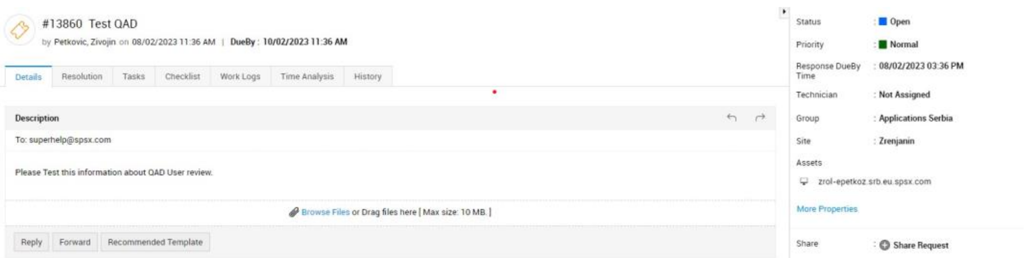
Technicians can also change those values in the Properties part of the Request page.



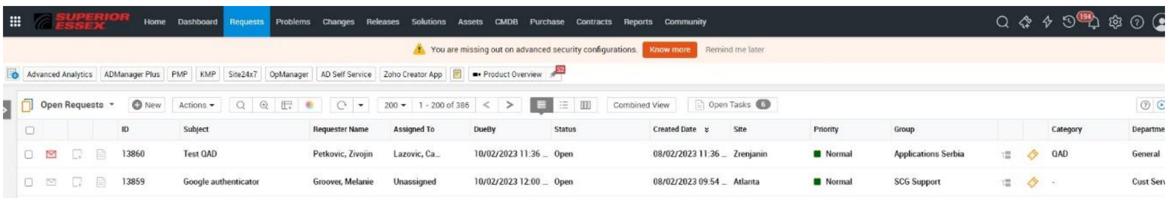
Technicians can also take other actions by clicking on the Action button



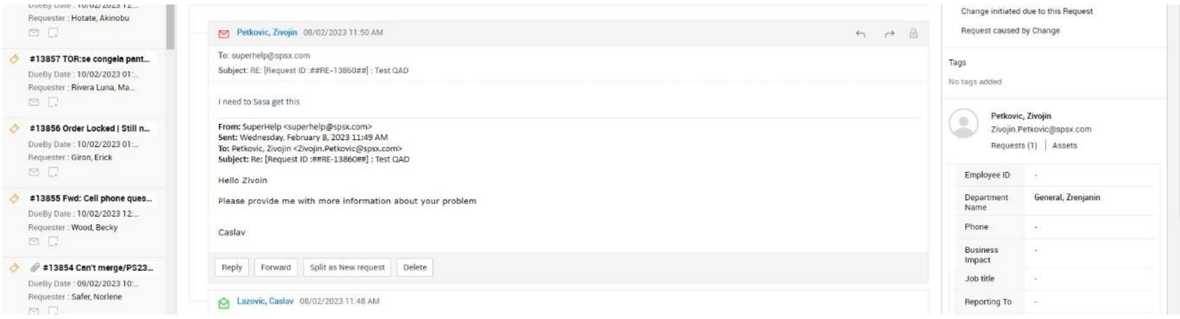
Through this page, Technician can communicate with the requester. By Clicking on the button reply technician can send a message to the requester.

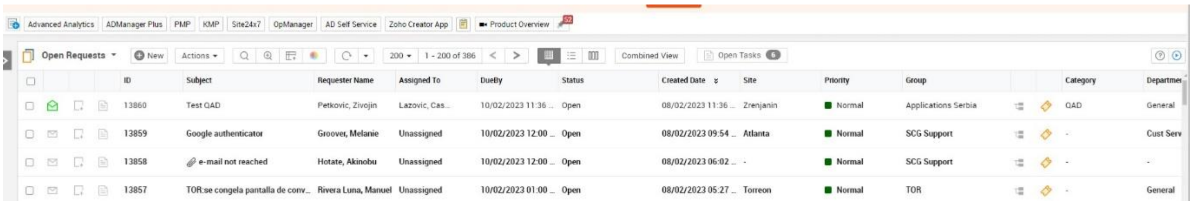


When the requester replies on mail from the technician little red letter sign will be created on the request.

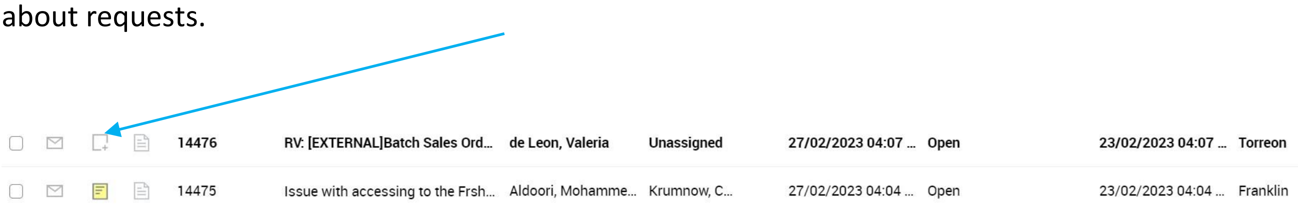


Technicians can read and reply to this message from users on the request page. After that, this letter sign will become green.

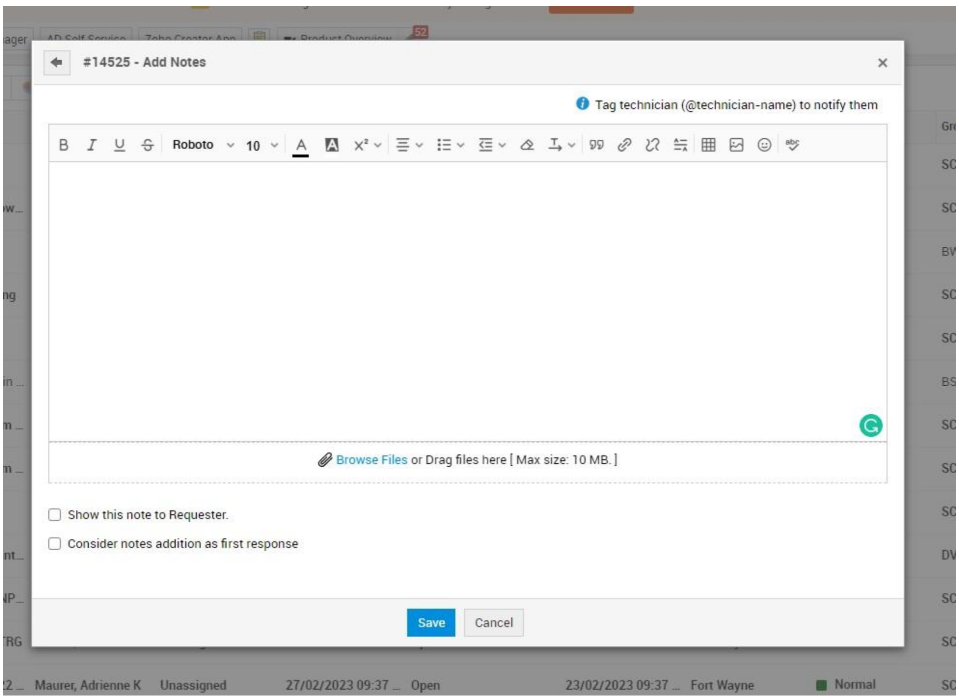




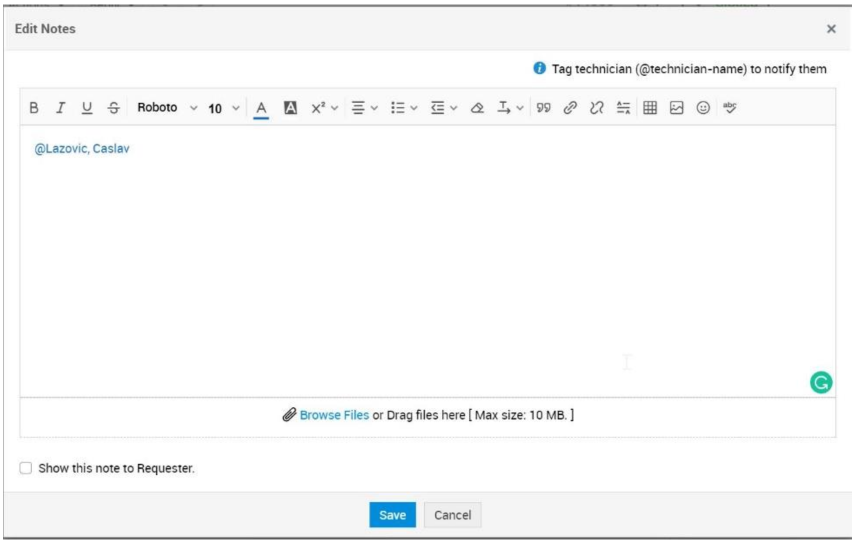
Also, in situations when technicians need consultation or help from other technicians or outside support, he can forward the requester's mail to them. Technicians or supervisors can create a note about requests.



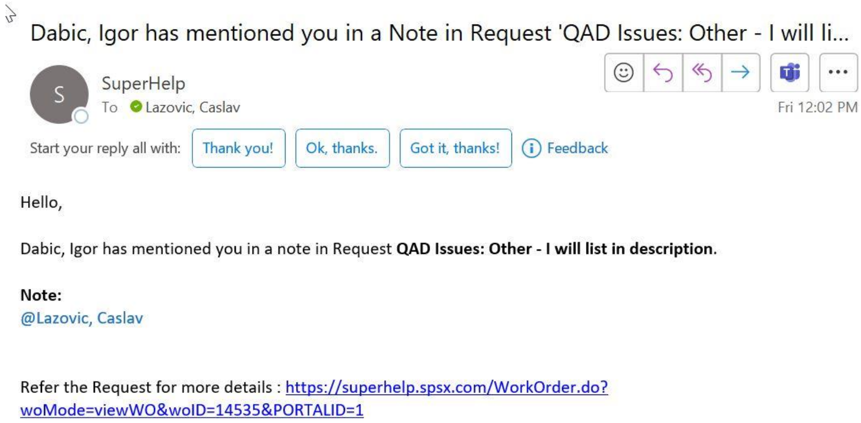
It is sometimes very useful to write some notes about your work or about the work of other technicians.



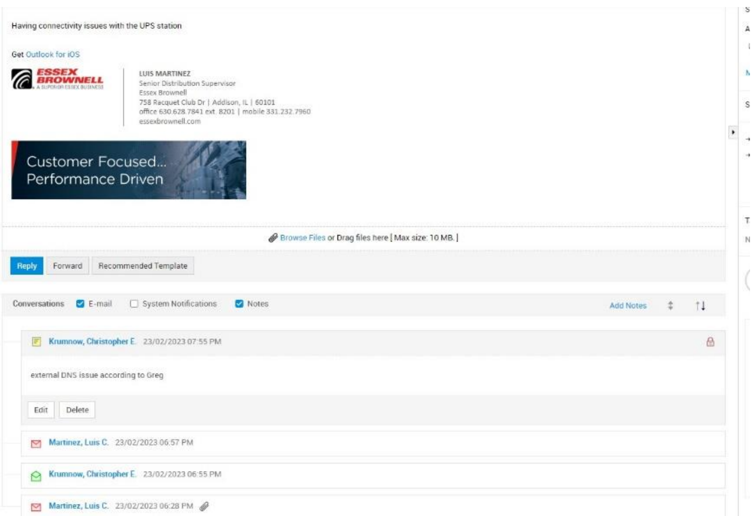
The technician or supervisor can send a message to the other technicians by tagging them (@tecnicina_name) in the notes.



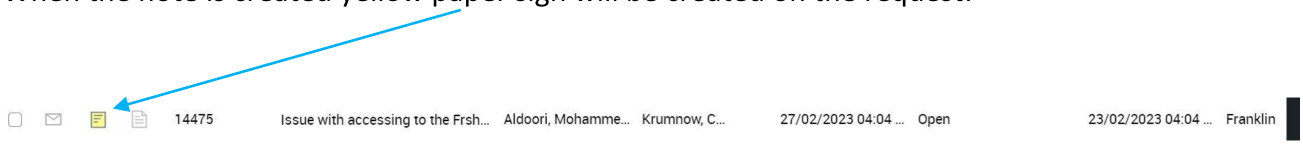
The technician tagged in the note will receive mail about that.



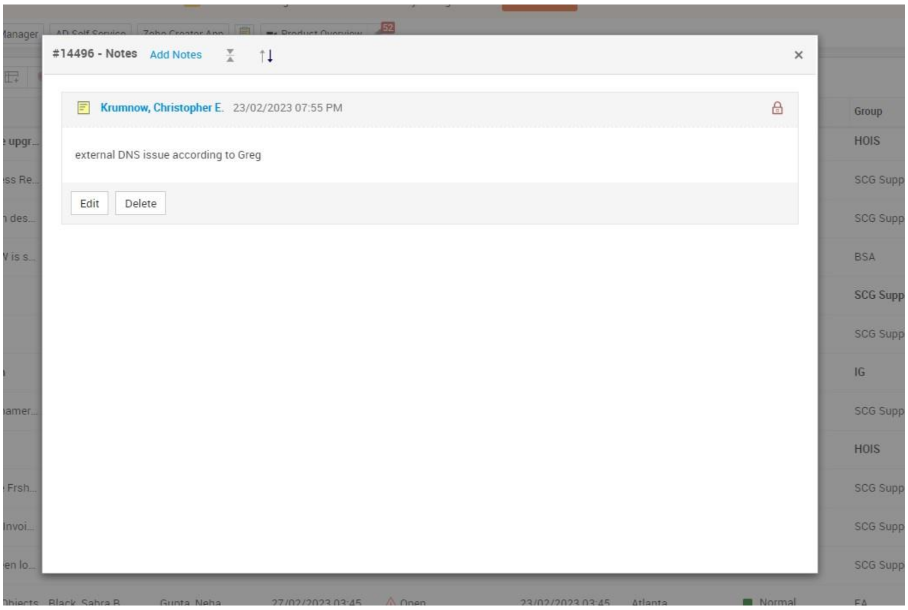
If the technician checks the option Show this note to Requester status of the note will change from private to public. When the status of the note is public technicians and requesters can see the note, otherwise, if the status is private, only technicians can read the note.



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

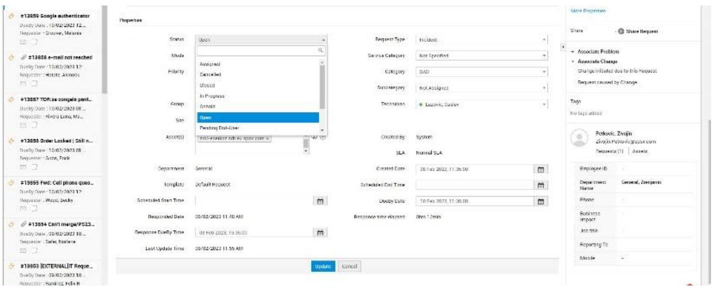


When the technician clicks on that sign, he can read the note.

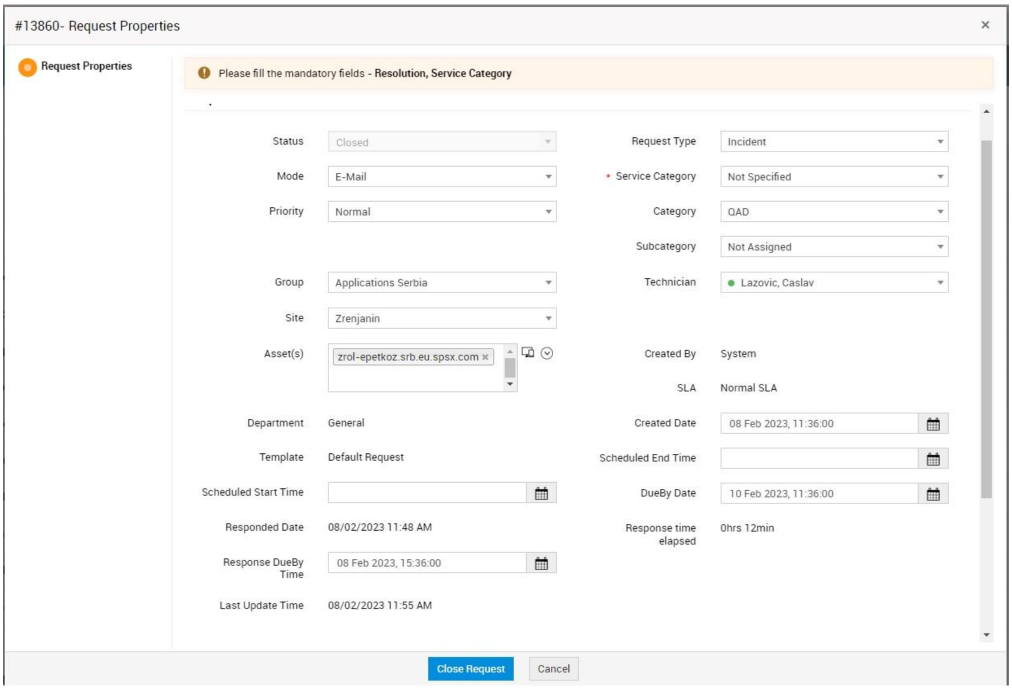


After the technician fulfills requests from users, he can close the request (ticket).

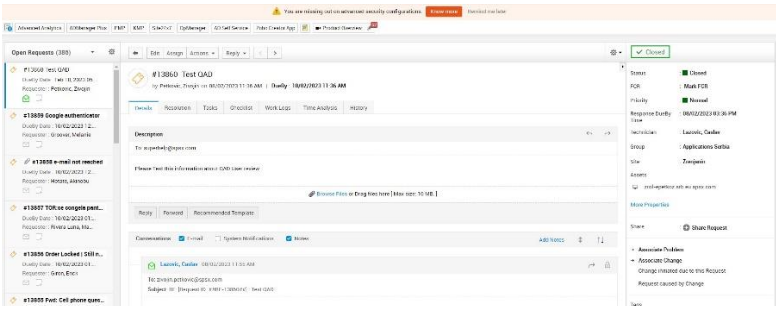
To close the request, the technician must change the Status of the request from Open to Close.



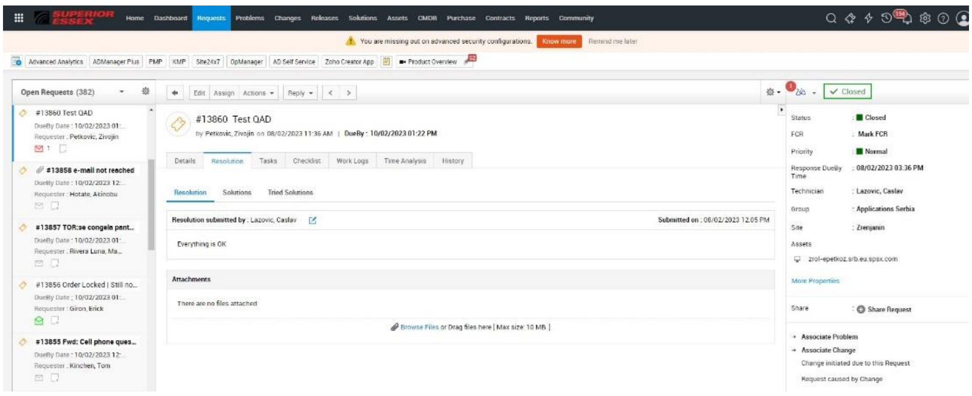
But before he can close the request, the technician must fill Category, Service Category, and Resolution fields in the request properties.



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

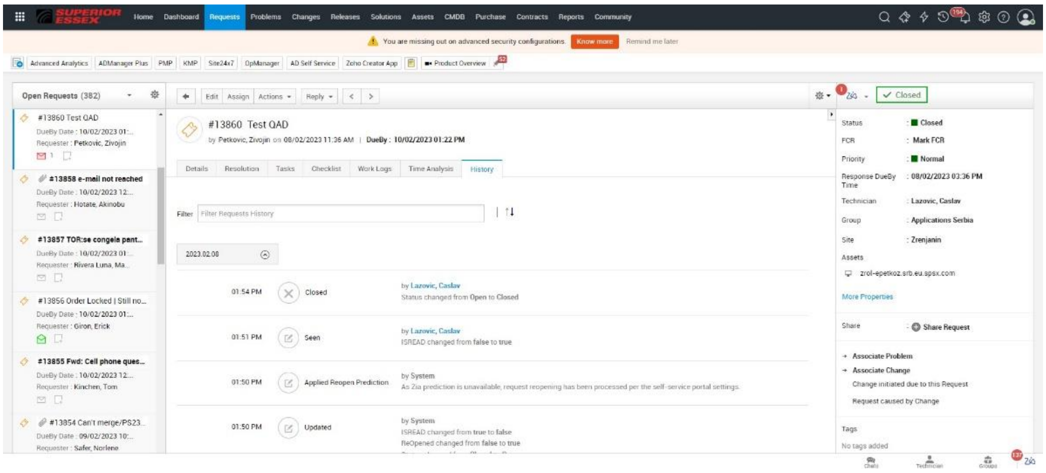


On the Resolution tab of the request page, technicians can see detailed information about the steps which was needed to be done to fulfill the request.

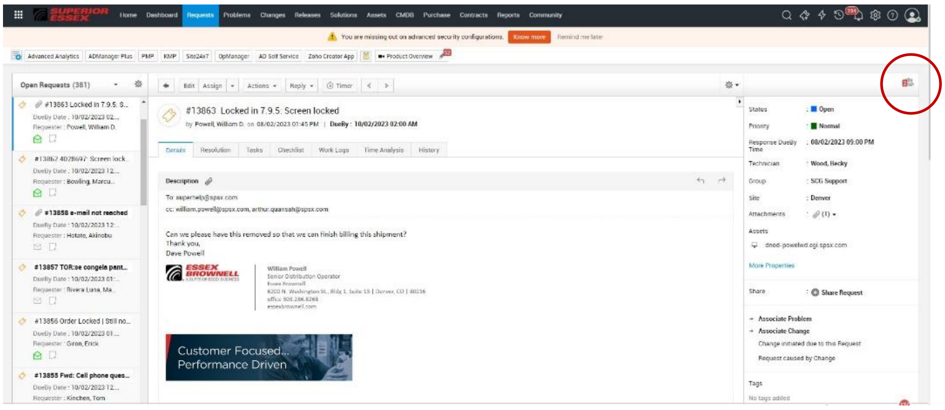


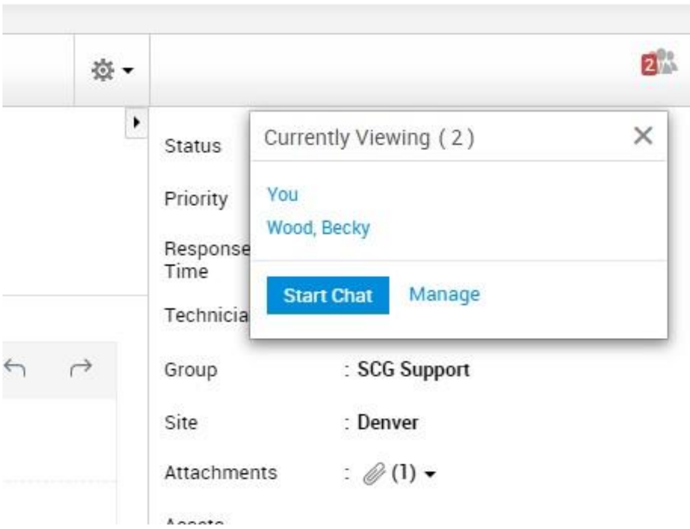
On the tab Tasks, we can see if there were some tasks that the technician must fulfill before he closes the ticket.

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



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



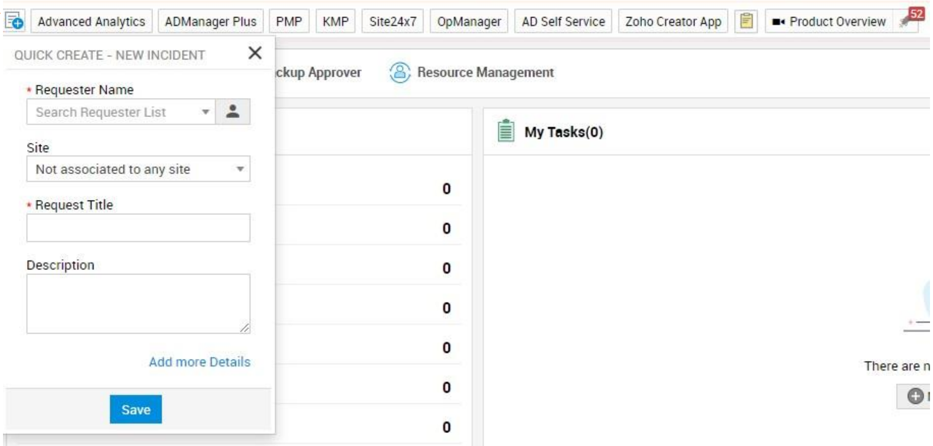


If a technician is working on a request, other technicians viewing that request will receive notifications.

Creating Requests

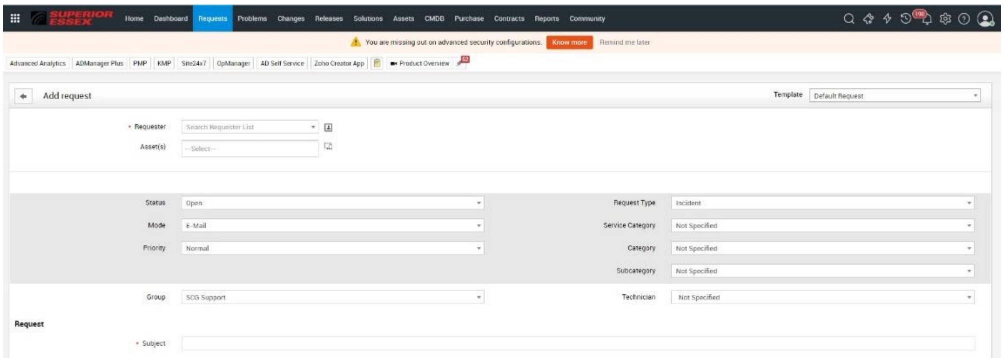
In several ways, technicians can create requests.

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



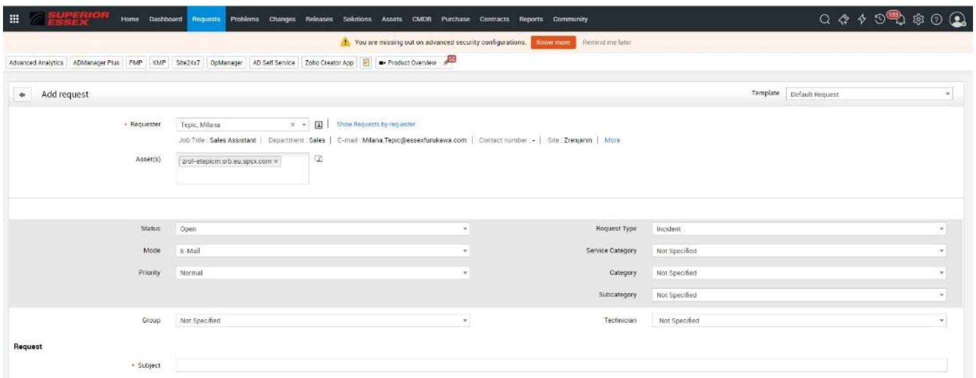
After entering Requester Name, the field Site will be automatically populated.

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.

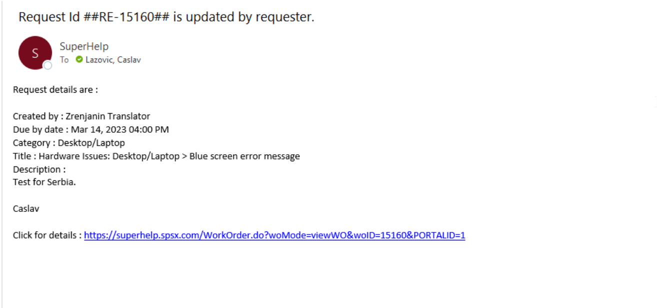
After entering Requester Name, technicians can see information about the user, and the field Site will be automatically populated. Technicians then choose a value for the Group field and assign the request to the appropriate technician.



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.



Request Id ##RE-15160## is updated by requester.

SuperHelp
To Lazovic, Caslav

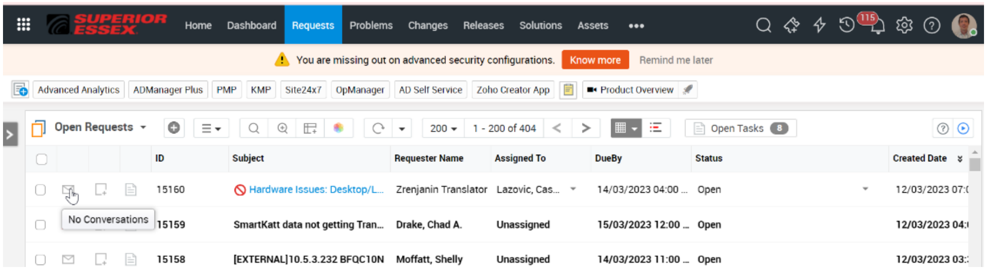
Request details are :

Created by : Zrenjanin Translator
Due by date : Mar 14, 2023 04:00 PM
Category : Desktop/Laptop
Title : Hardware Issues: Desktop/Laptop > Blue screen error message
Description :
Test for Serbia.

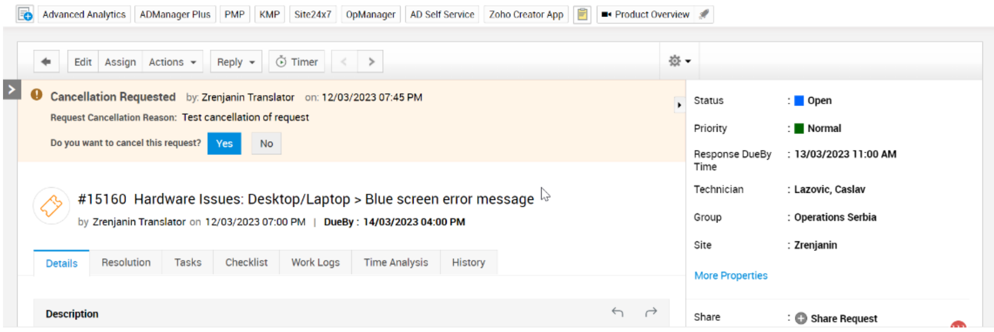
Caslav

Click for details : https://superhelp.spsx.com/WorkOrder.do?woMode=viewWO&woID=15160&PORTALID=1

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



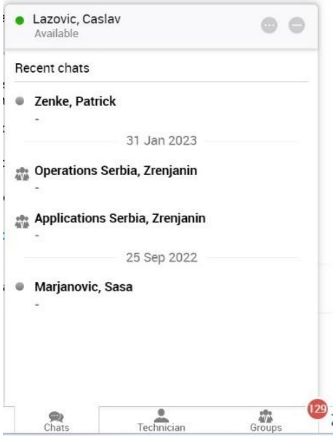
On the request detail page, the technician has the option to approve or reject a cancellation request.



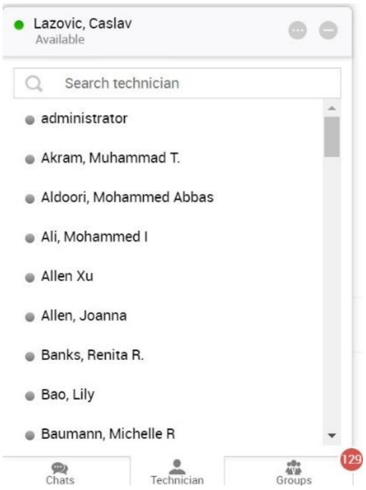
Footer

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

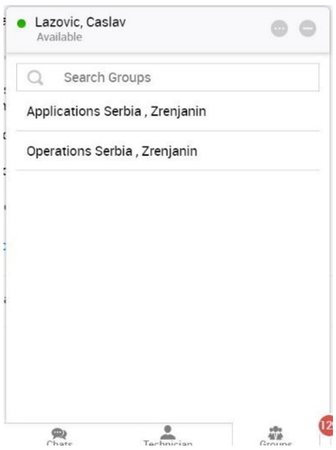
In the chat tool, the technician can see his chat history.



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

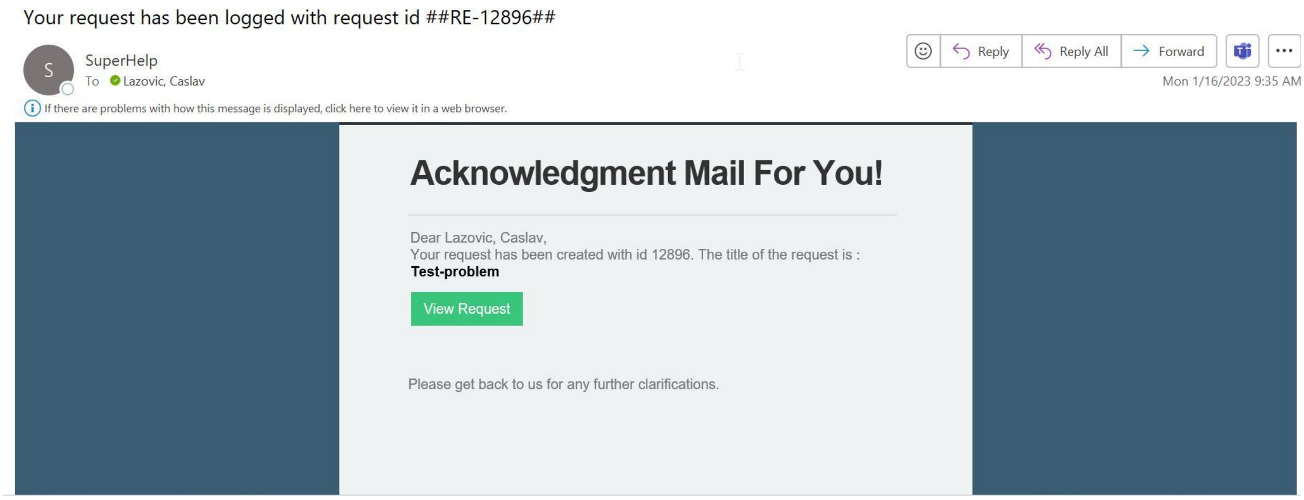


In Groups tool, the technician can search his group and send messages to all members of the group.



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##

SuperHelp
To Lazovic, Caslav

Mon 1/16/2023 9:35 AM

If there are problems with how this message is displayed, click here to view it in a web browser.

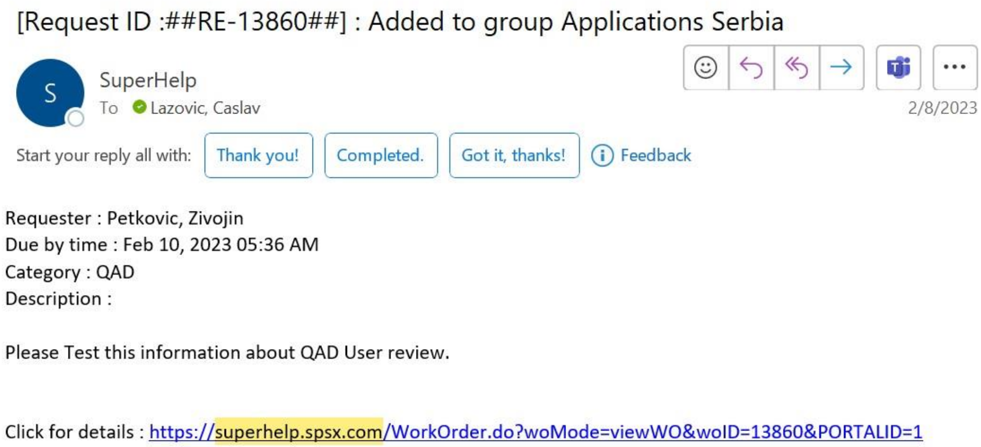
Acknowledgment Mail For You!

Dear Lazovic, Caslav,
Your request has been created with id 12896. The title of the request is :
Test-problem

View Request

Please get back to us for any further clarifications.

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

SuperHelp
To Lazovic, Caslav

2/8/2023

Start your reply all with: Thank you! Completed. Got it, thanks! Feedback

Requester : Petkovic, Zivojin
Due by time : Feb 10, 2023 05:36 AM
Category : QAD
Description :

Please Test this information about QAD User review.

Click for details : https://superhelp.spsx.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

Fri 12:02 PM

Start your reply all with: Thank you! Got it, thanks! Received, thank you. Feedback

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

Fri 12:02 PM

Start your reply all with: Thank you! Ok, thanks. Got it, thanks! Feedback

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.

SuperHelp

To Lazovic, Caslav

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