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# ServiceDesk Plus User Guide - Introduction

ServiceDesk Plus is an on-premises help desk solution that helps support teams deliver efficient service so that the smooth functioning of any business remains unaffected.

ServiceDesk Plus enables support personnel and employees to interact easily and solve issues quickly and restore any service disruptions to ensure business continuity.

To report issues, users can log on to the self-service portal of ServiceDesk Plus. On this portal, they can report issues, raise requests for specific services, and also keep track of all the requests they raised.

In the next few pages, we will discuss how users can access the self-service portal to:

- Log issues.
- Raise service requests.
- Initiate chat conversations with technicians.
- Search through the knowledge base for possible resolutions.
- Access projects or changes.
- Update their personal information.

[Next >>](#)

[Log into ServiceDesk Plus](#)

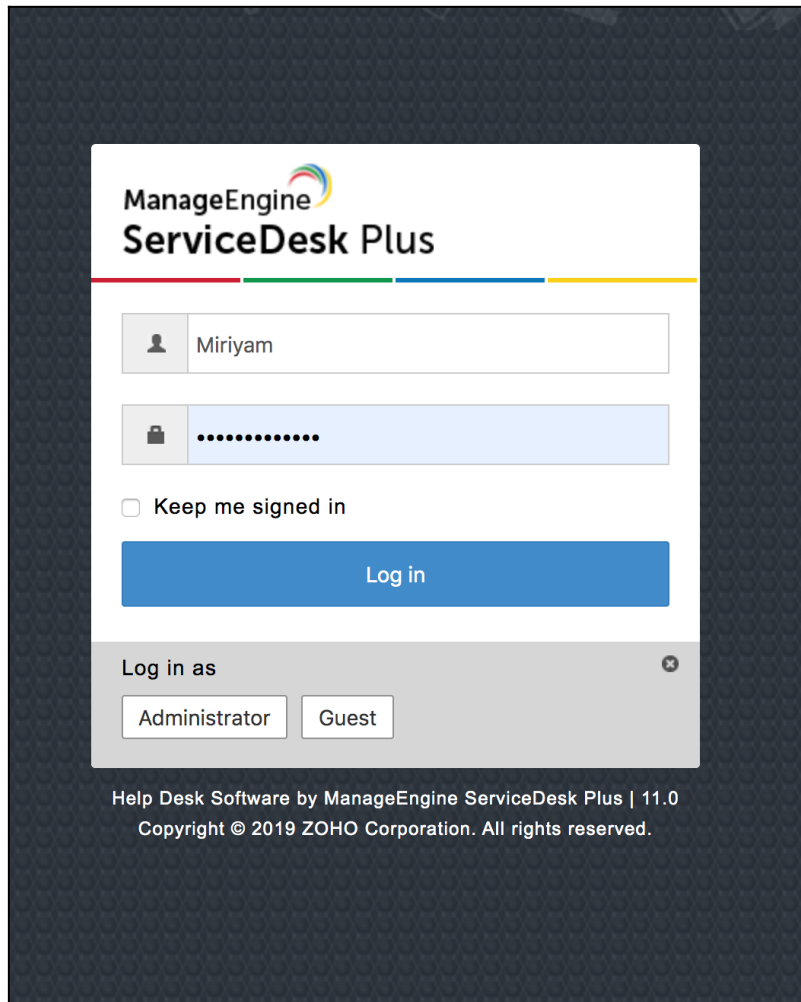


# Log Into ServiceDesk Plus

To access the application, go to **https://<ServerName>:<PortNumber>** or **https://<ServerIPAddress>:<PortNumber>**.

If the application is hosted on the web, go to the URL provided by your administrator.

p.p1 {margin: 0.0px 0.0px 0.0px 0.0px; text-align: center; font: 12.0px 'Helvetica Neue'; color: #454545; min-height: 14.0px}



Use the login credentials that your system administrator provided you to access the Self-Service Portal.

If you are unable to log in, write to your ServiceDesk Plus admin.

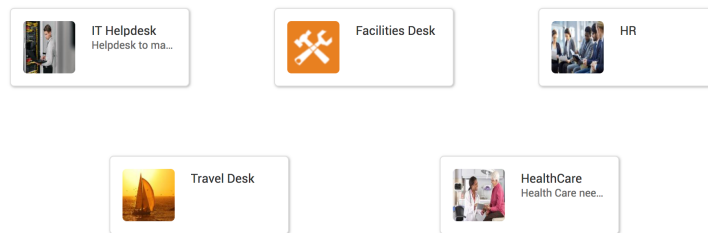
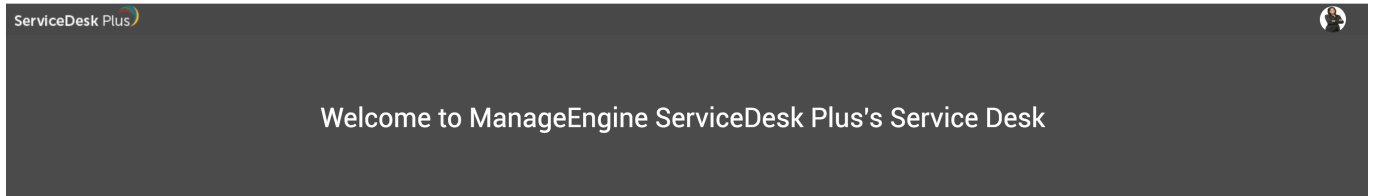
[Next >>](#)

[Choose your enterprise service management portal](#)

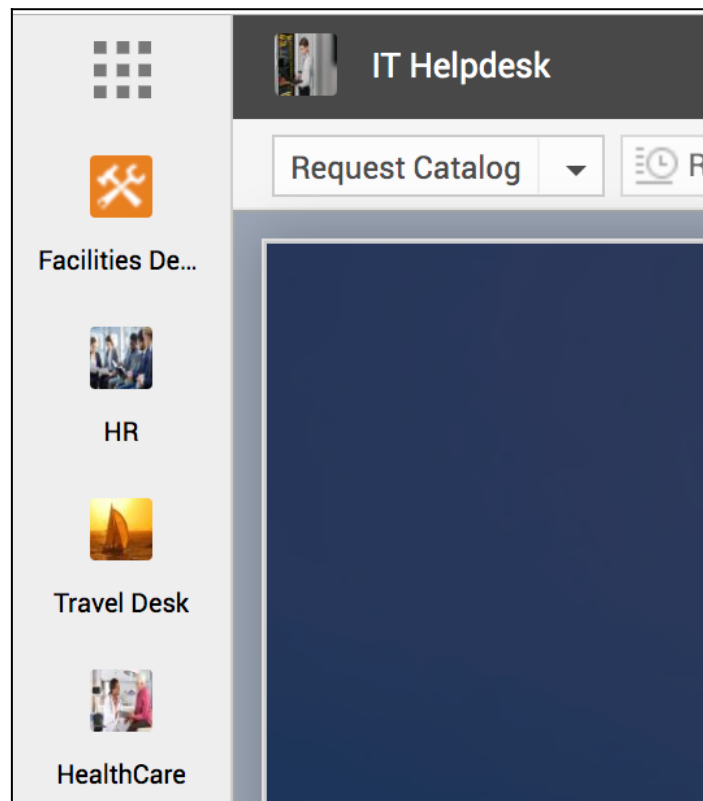
## Self Service Portal

After you log into the application, the various service desks available in your organization will be listed. If your organization does not use Enterprise Service Management from ServiceDesk Plus, only the IT portal will be listed.

Select from the list, as shown below:



- In case you have to change portals, go to the drop-down on the left panel and select the portal, as shown below:



[Next >>](#)

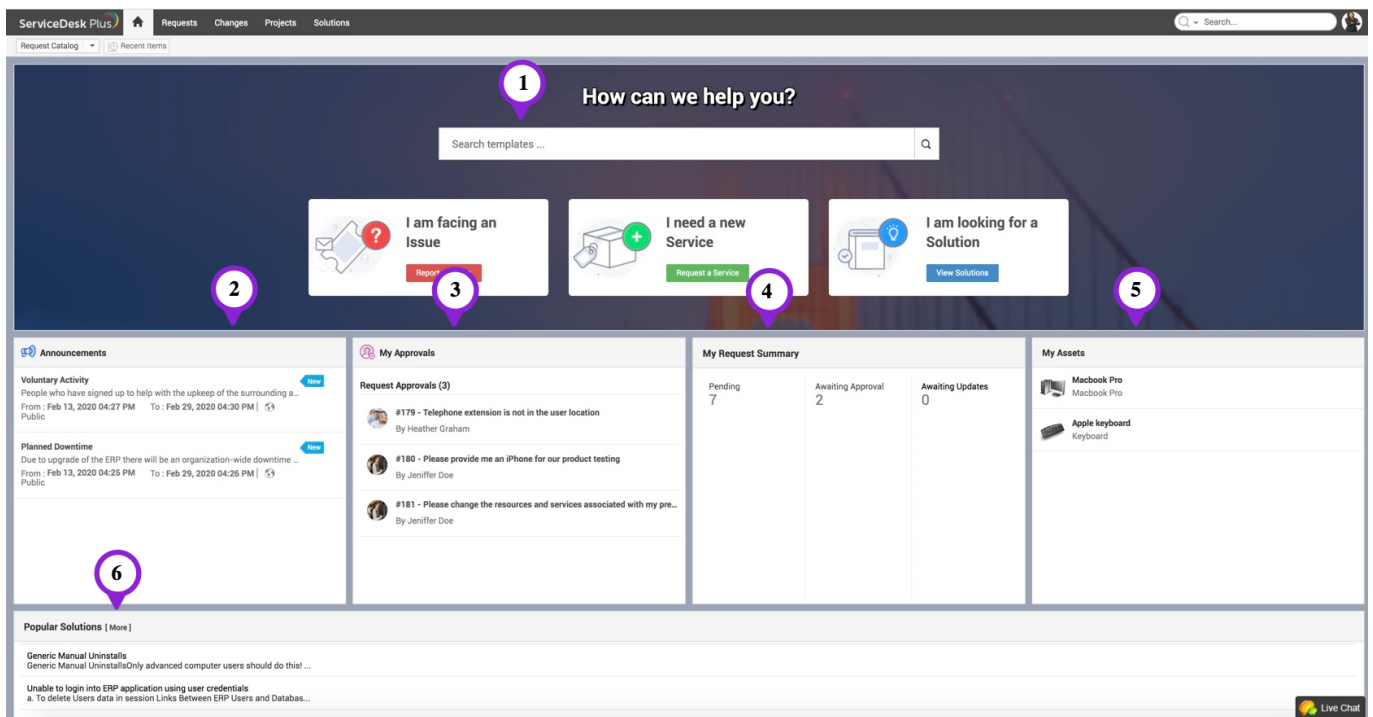
[Self-service portal of your service desk](#)

# Self Service Portal Home Page

The first page you see after you log in is the Home page of the service desk you have chosen.

On this page, you can log issues, raise service requests, browse the knowledge base for solutions, keep track of your requests, and access company-wide announcements.

This page also lists the assets that are specifically assigned to you.



Depending on how your administrator has configured the self-service portal and your role-specific permissions, you may have access to some or all of the following widgets:

1. [Search](#)
2. [Announcements](#)
3. [My Approvals](#)
4. [My Request Summary](#)
5. [My Assets](#)
6. [Popular Solutions](#)

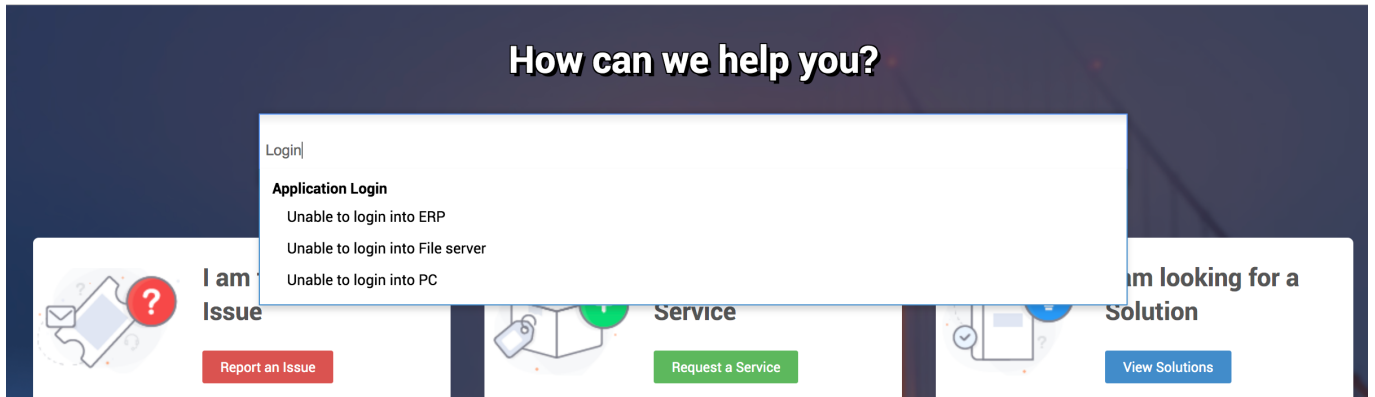
---

[Next >>](#)

[Search Templates](#)

# Search Templates

The search widget enables you to look for and find specific service and incident templates. Type the letters or keywords in the search field and select from the displayed list of results.




[Next >>](#)

[Announcements](#)

# Announcements

On the Home page, the Announcements widget displays all company-wide information. This could be information regarding a planned downtime or any other important updates from the service desk.


New announcements sport a badge for easy identification.

 **Announcements**

---

**Multi-SLAs for Service Requests** New


Yes, you heard that right! We now have multi SLAs...

From : **Feb 17, 2020 01:07 PM**    To : **Feb 28, 2020 01:10 PM** |  Public

---

**Voluntary Activity**


People who have signed up to help with the upkeep of the su...

From : **Feb 13, 2020 04:27 PM**    To : **Feb 29, 2020 04:30 PM**  
|  Public

---

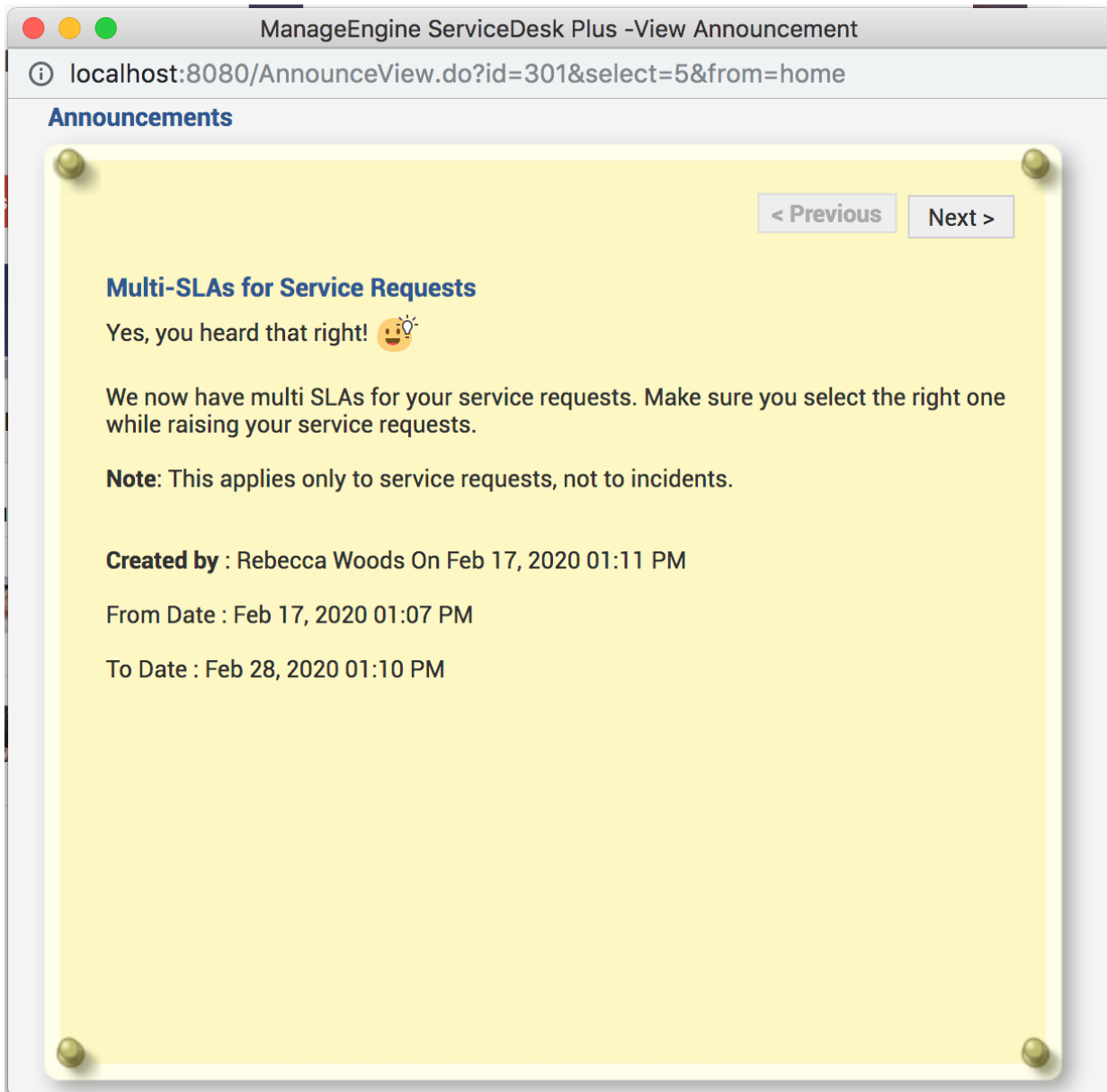
**Planned Downtime**

Due to upgrade of the ERP there will be an organization-wid...

From : **Feb 13, 2020 04:25 PM**    To : **Feb 29, 2020 04:26 PM**  
|  Public

---

To view the details of any announcement, click it for an expanded view:




The screenshot shows a web browser window titled "ManageEngine ServiceDesk Plus -View Announcement". The address bar contains the URL "localhost:8080/AnnounceView.do?id=301&select=5&from=home". Below the address bar, the page is titled "Announcements". The main content is a yellow sticky note with a lightbulb icon. The text on the sticky note reads: "Multi-SLAs for Service Requests", "Yes, you heard that right! 🧠", "We now have multi SLAs for your service requests. Make sure you select the right one while raising your service requests.", "Note: This applies only to service requests, not to incidents.", "Created by : Rebecca Woods On Feb 17, 2020 01:11 PM", "From Date : Feb 17, 2020 01:07 PM", and "To Date : Feb 28, 2020 01:10 PM". Navigation buttons "< Previous" and "Next >" are visible in the top right corner of the sticky note.

[Next >>](#)

[My Approvals](#)

# My Approvals


This widget is available only if you have an assigned service or purchase approver role. Under this widget, all requests that have been sent to you for approval are populated.

 **My Approvals**


---

**Request Approvals (2)**

---

 **#179 - Telephone extension is not in the user locati...**  
By Heather Graham

---

 **#181 - Please change the resources and services a...**  
By Jeniffer Doe

---

To act on any of the listed requests, click the required request, select the approval action, add any comments, and click **Save**.



ManageEngine ServiceDesk Plus

localhost:8080/approval/Approve.jsp?MODULE=Request&approval\_id=304&woID=181&FROM=HOME&PORTALID=1

### Approval Details - Stage One

Status  Approve  Reject


Comments

### Previous Approval Details

0 - 0 of 0 | | Show  per page

Approver	Sent on	Status	Acted On	Description	Stage
No data available					

### Service Request Details [ Request ID : 181 ]

 **#181 Please change the resources and services associated with my previous place to the current place**

Status : Open Priority : -

by Jeniffer Doe on Feb 13, 2020 04:10 PM |  
DueBy : N/A

[Next >>](#)

[My Request Summary](#)

# My Request Summary

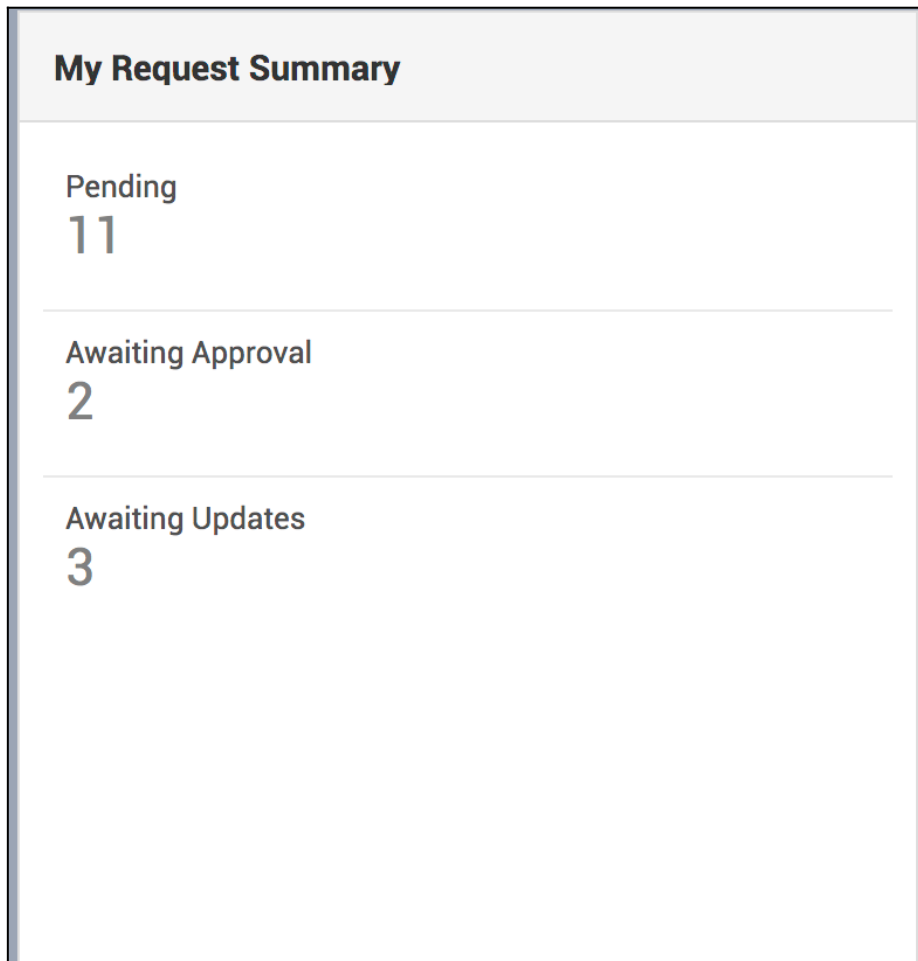
This widget provides an overview of the requests you have logged. You can at a glance know the number of requests that are Pending, Awaiting Approval, and Awaiting Updates.

Pending requests are the logged requests that haven't yet been assigned to a technician.

Awaiting Approval requests have been sent to the approvers for their action.

Awaiting Updates requests have been sent to the logged-in user, you, who is identified as the Editor, for specific information.

Editors are users who can modify any of the request information after it is logged.



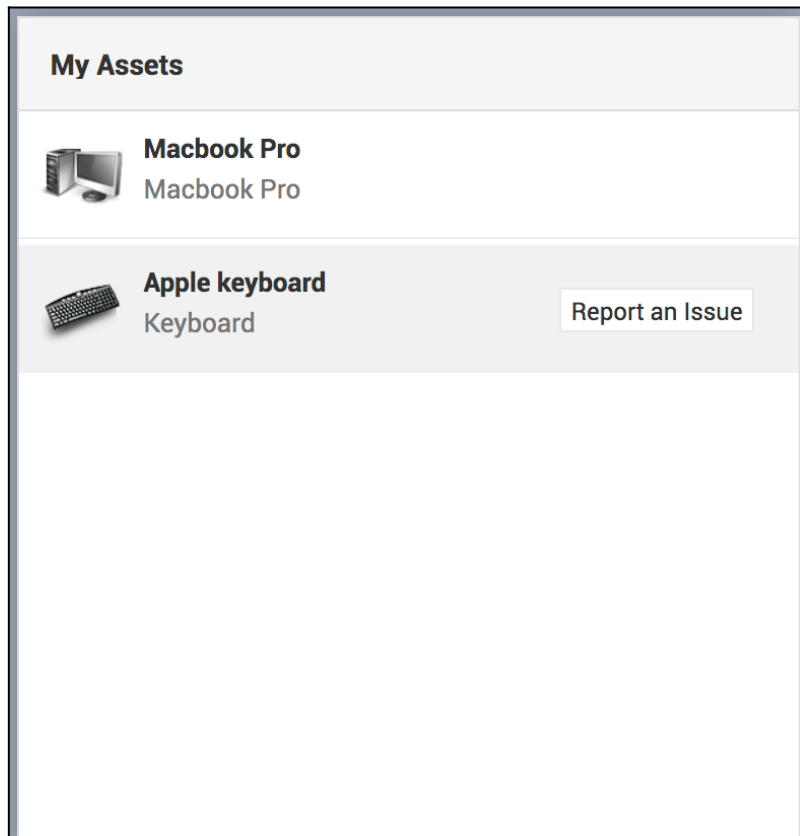
[Next >>](#)

[My Assets](#)

# My Assets

The My Assets widget automatically lists all the assets associated with the user. Usually, the laptop, its hardware, mobile devices, and the like are available under this widget. This widget makes it easy for the user to raise any issues or services related to these assets.

To raise a request about one of the assets under this widget, hover over the asset, click Report an Issue, and proceed to log the issue.



[Next >>](#)  
[Popular Solutions](#)

# Popular Solutions

This widget populates all the knowledge base articles. The most frequently used articles appear right on the top. The search box enables you to search through the knowledge base by using keywords.

**Popular Solutions** | [More](#) |

---

**Tips to uninstall programs**  
First method: Use Windows Uninstall WizardIf you are using Windows:Go ...

---

**Generic Manual Uninstalls**  
Generic Manual UninstallsOnly advanced computer users should do this! ...

---

**Unable to login into ERP application using user credentials**  
a. To delete Users data in session Links Between ERP Users and Databas...

---

**Move data from one installation from another**  
You can move the data from the existing server to new server. Please f...

[Next >>](#)

[Log Issues: What is an Issue?](#)

## What Is an Issue?

The Self Service Portal enables users to report issues to their service desk.

An issue could be an event that stops you from performing your routine activity.

**For example, if you are unable to connect to the network, you may not be able to collaborate with your colleagues and perform your everyday activities. Therefore, an issue can be defined as a service disruption that prevents you from performing your day-to-day activities.**

Report issues to the respective service desk for quicker resolution.

Service desks are help desks that cater to the needs of specific verticals, such as Human Resources, Facilities, IT, and so on.

The help desk team is tasked with resolving all reported issues within a specific time frame, also known as service level agreements or SLAs. Depending on the type of issue reported, the SLAs can vary.

[Next >>](#)

[Report an Issue](#)

# Report an Issue

In the self-service portal of ServiceDesk Plus, you can report an issue in 3 locations:

- [Home Page](#)
- [Issue Catalog/Request Catalog](#)
- [Requests Tab](#)

You can also send an email to the configured email address to create an issue. Make sure the email contains all the required details about the issue and also your details.

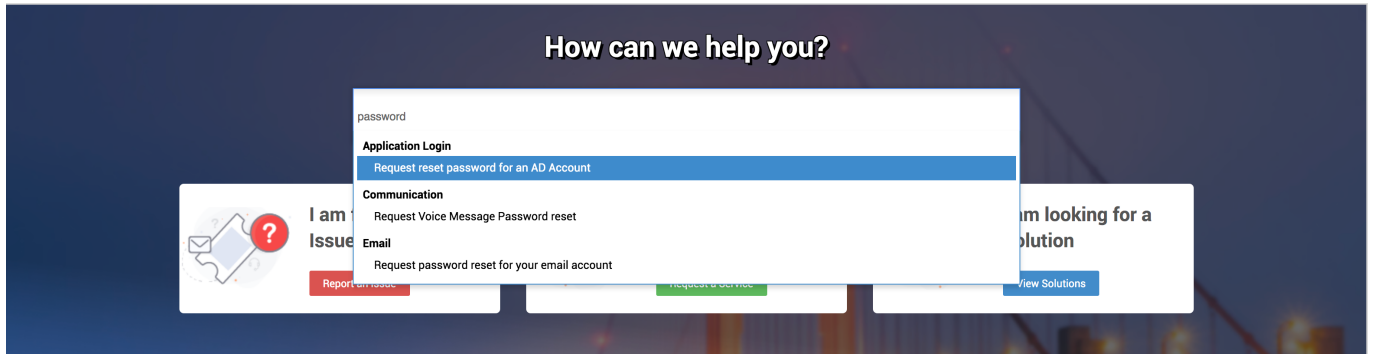
[Next >>](#)

[Report an issue on Home Page](#)

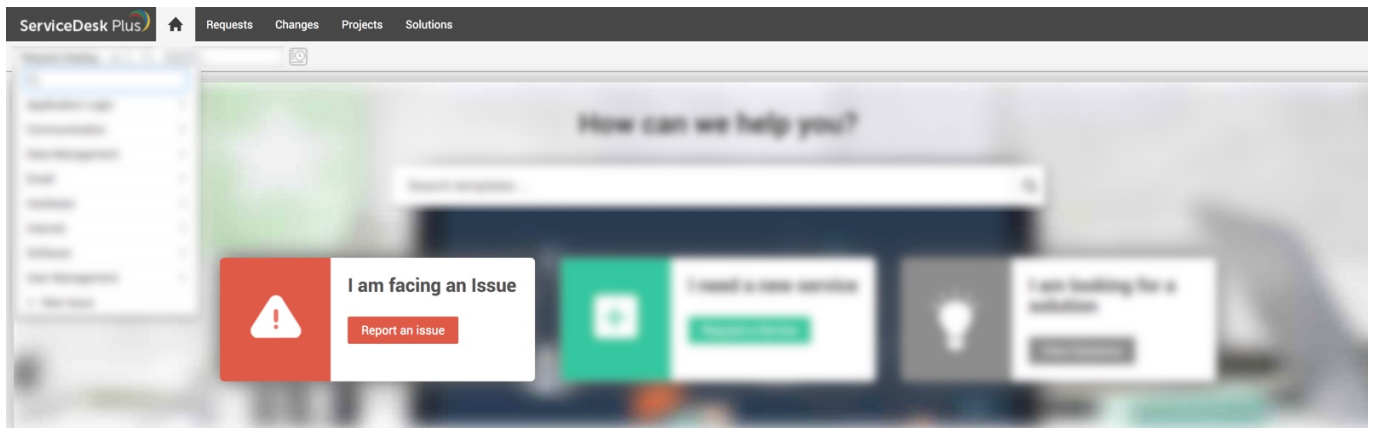
# Report an Issue on Home Page

In the **Search** bar, you can look for specific templates to log your issues.

Search for templates using keywords.










In the I am facing an issue tile, click Report an Issue to log the issue in the portal.



A list of templates will be displayed for you to select from.

On this page, you can search using keywords for specific templates, as shown below:

## Service Categories

 <b>Application Login</b> Services related to application login like creating CRM account, SAP account, MSSQL account, Active	 <b>Communication</b> Services related with communication like requesting for a telephone or DID extension, a mobile phone for on-call	 <b>Email</b> Services related to email like creating an email account, email client installation, password reset for email	 <b>Hardware</b> Services related to hardware purchase, upgrading RAM, requesting a laptop or a desktop, etc., are placed
 <b>Internet</b> Services related to internet access, WiFi access, creating a VPN account, booking a domain, proxy	 <b>Software</b> Services related to software installation/un-installation, software purchase, license purchase, software	 <b>Others</b> Others	

---

[Next >>](#)

[Raise an issue from Issue Catalog/Request Catalog](#)



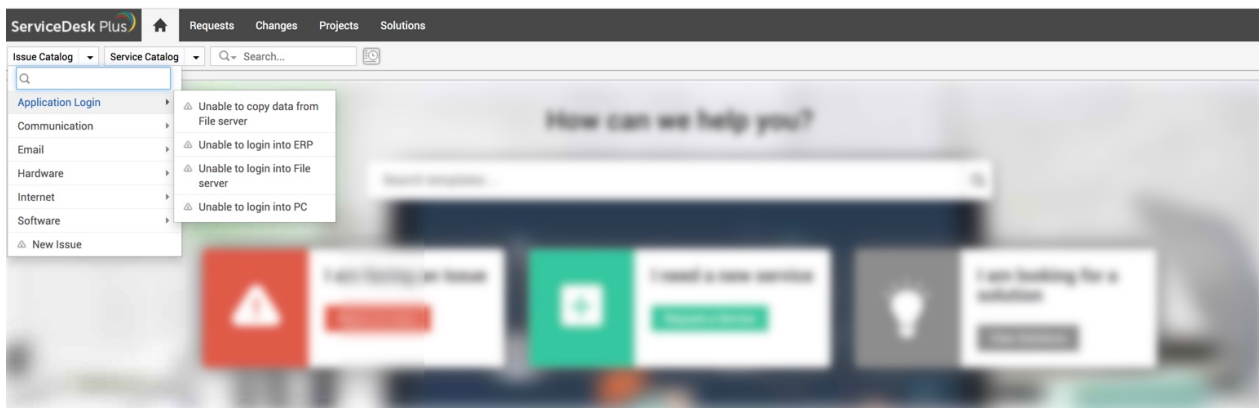
# Issue Catalog/Request Catalog

On the Home page, click the Issue Catalog or Request Catalog drop-down.

Issue Catalog lists only issue Templates, whereas Request Catalog lists both issue and Service Templates.

A list of available template categories and templates will be displayed.

Click from the list, as shown below:



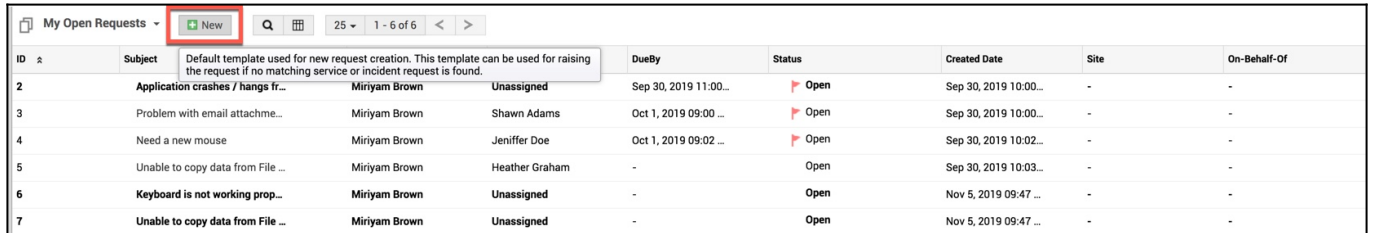
When you select a template, the issue Request form will be displayed. Proceed to fill out the form as discussed [earlier](#).

[Next >>](#)  
[Requests](#)

# Requests

On the upper panel of the application, go to the **Requests** tab.

On this page, click **New**.



ID	Subject	Status	DueBy	Created Date	Site	On-Behalf-Of
2	Application crashes / hangs fr...	Unassigned	Sep 30, 2019 11:00...	Sep 30, 2019 10:00...	-	-
3	Problem with email attachme...	Open	Oct 1, 2019 09:00 ...	Sep 30, 2019 10:00...	-	-
4	Need a new mouse	Open	Oct 1, 2019 09:02 ...	Sep 30, 2019 10:02...	-	-
5	Unable to copy data from File ...	Open	-	Sep 30, 2019 10:03...	-	-
6	Keyboard is not working prop...	Open	-	Nov 5, 2019 09:47 ...	-	-
7	Unable to copy data from File ...	Open	-	Nov 5, 2019 09:47 ...	-	-

The Incident Request form for a default request template will be displayed.

You can change the template by selecting from the template drop-down. Proceed to fill out the form as discussed [earlier](#).

[Next >>](#)  
[Fill Out the Template](#)

# Fill Out the Template

When you select a template, a form containing various fields will be displayed.

This form, depending on the context, can be called the Incident/Service Request form.

Fill out the required fields, add a subject, and describe the issue in detail and click **Add Request**.

You can also add attachments, that are not more than 10MB in size, to the request form.

Attachments could be a screenshot of the error or any associated details saved as a different file.

You can track your request status under the **Request** tab.

Field	Explanation
Name	Your name will be populated here.
Asset	Select from the drop-down. These are assets that are associated with you.
Template	Select from one of the pre-configured templates to save time because most of the fields will be auto-populated in a template.
Priority	Refers to how urgent the issue is.

Category	Select from the drop-down. Choosing the accurate category ensures quicker resolution.
Subcategory	Select from the drop-down. Choosing the accurate subcategory ensures quicker resolution.
Subject	Provide short information about the issue.
Description	Describe the issue in detail.

After you add the request, the Request Details page will open.

On this page, you can track all request-related communication and the request status.

The screenshot shows the ServiceDesk Plus interface for a request titled "#7 Unable to copy data from File server" by Miriyam Brown. The page includes a navigation bar with "Requests", "Changes", "Projects", and "Solutions". Below the navigation bar, there are tabs for "Details", "Resolution", and "History". The main content area shows the request description: "User is not able to copy data from File server to user PC." and a "Reply" button. To the right, there is a sidebar with request properties such as Status (Open), Asset(s) (-), Priority (Not Assigned), and DueBy Date (-). Below the description, there is a "Conversations" section with "No Conversations" and a "Properties" table.

Priority	Not Assigned	Category	Not Assigned
Subcategory	Not Assigned	Item	Not Assigned
Request Type	Not Assigned	Status	Open
Mode	Web Form	Level	Not Assigned
Group	Not Assigned	Technician	Not Assigned
Service Category	Application Login	Impact Details	-
Impact	Not Assigned		

[Next >>](#)

[Raise Service Requests: What is a Service Request?](#)

## What Is a Service Request?

The self-service portal enables users to raise service requests to the IT help desk.

A Service Request, as the name implies, is simply a request for a service or resource from the service desk. This does not disrupt services in any way.

**For example, soon after an employee joins the organization, they might require a mobile phone or specific software to perform their duties. This requirement will be raised as a service request.**

Service Requests have a different set of SLAs (service level agreements) from issues. The user can also select from the SLAs listed on the request form.

[Next >>](#)

[Raise a Service Request](#)

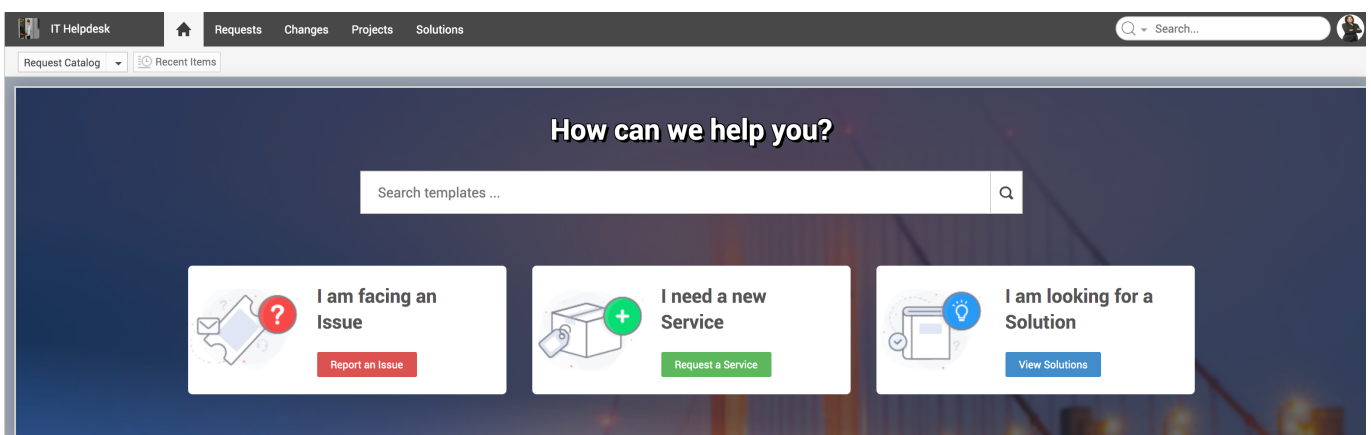
# Raise a Service Request

In the self-service portal of ServiceDesk Plus, you can raise a service request in 2 locations:

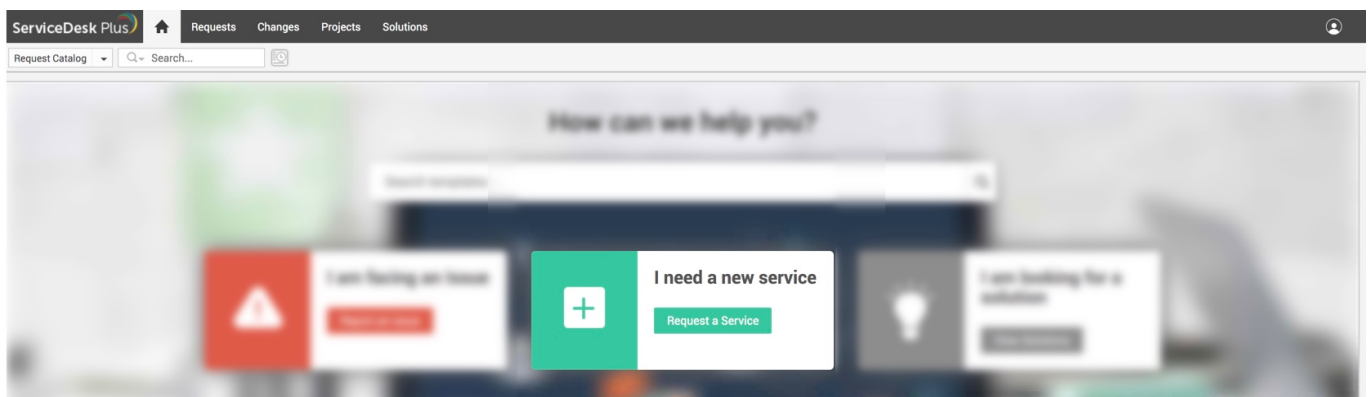
- Home Page
- [Request Catalog](#)

## Home Page

In the Search bar, you can look for specific templates to log your issues. Search for templates using keywords.



On the Home page, in the I need a new service tile, click **Request a Service**.



A list of templates will be displayed for you to select.

On this page, you can also search using keywords for specific templates, as shown below:

**Service Categories**

The screenshot displays the 'Service Categories' page. A dropdown menu is open over the 'Email' category, showing the following options:

- New |
- Email**
- Request a new email account creation
- Request a new mailing list creation
- Hardware**
- Request a Laptop
- Request a new Desktop
- User Management**

The main grid of categories includes:

- Application Login**: Services related to application login like creating CRM account, SAP account, MSSQL account, Active
- Communication**: Services related with communication like requesting for a telephone or DID extension, a mobile phone for on-call
- Data Management**: Services related to data management like performing backups, restore and clean up data are placed in this
- Email**: Services related to email like creating an email account, email client installation, password reset for email
- Hardware**: Services related to hardware purchase, upgrading RAM, requesting a laptop or a desktop, etc., are placed
- Internet**: Services related to internet access, WiFi access, creating a VPN account, booking a domain, proxy
- Software**: Services related to software installation/un-installation, software purchase, license purchase, software
- User Management**: Services related to hiring a new employee, requesting a department/place change, etc., are

When you select a template, the Service Request form will be displayed.

[Next>>](#)

[Service Request Catalog](#)

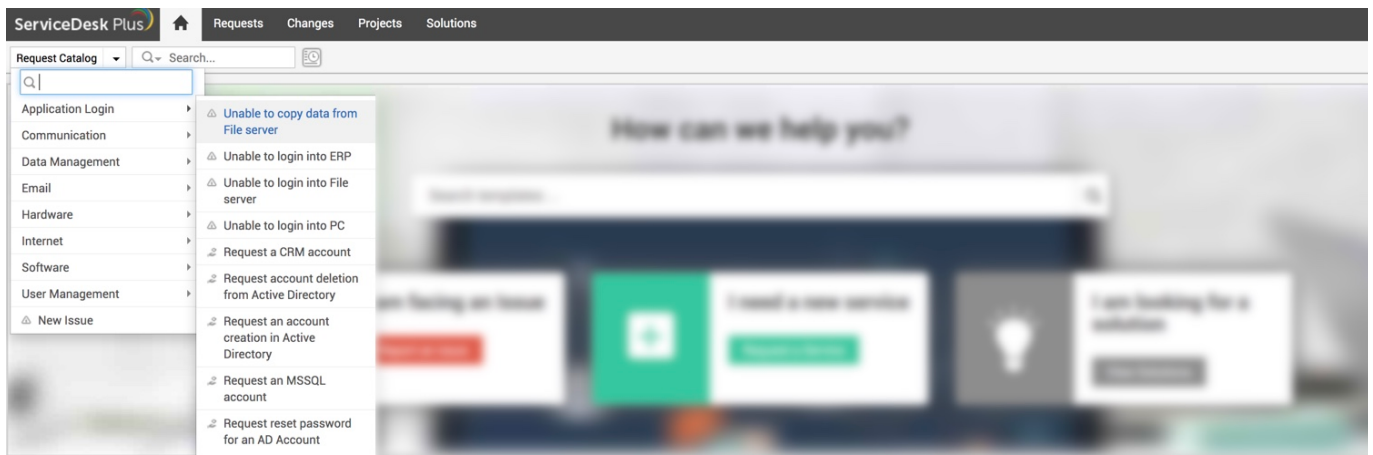
# Request Catalog

On the Home page, click **Request Catalog**.

Issue Catalog lists only issue Templates, whereas Request Catalog lists both issue and Service Templates.

A list of available template categories and templates will be displayed.

Click from the list, as shown below:



When you select a template, the Service Request form will be displayed. Proceed to fill out the form as discussed [earlier](#). Also, answer the resource questions, if any.

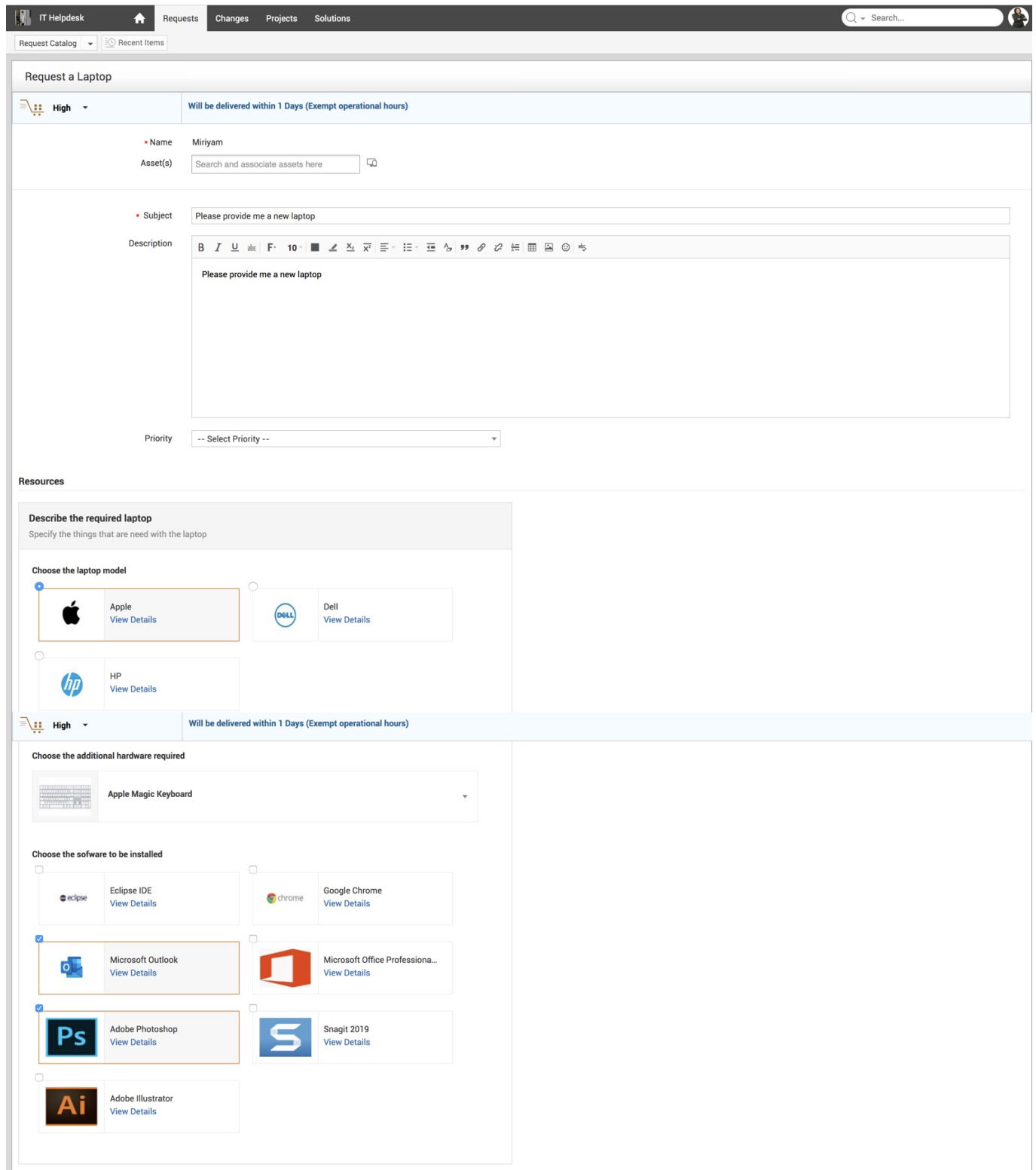
[Next>>](#)

[Fill out the Template](#)



# Fill Out the Template

When you select a template, a form containing various fields will be displayed.



The screenshot displays the 'Request a Laptop' form in the ServiceDesk Plus interface. The form is titled 'Request a Laptop' and shows the following fields and sections:

- Request Catalog:** Request Catalog, Recent Items
- Priority:** High
- Delivery:** Will be delivered within 1 Days (Exempt operational hours)
- Name:** Miriyam
- Asset(s):** Search and associate assets here
- Subject:** Please provide me a new laptop
- Description:** Please provide me a new laptop
- Priority:** -- Select Priority --
- Resources:**
  - Describe the required laptop:** Specify the things that are need with the laptop
    - Choose the laptop model:** Apple, Dell, HP
  - Choose the additional hardware required:** Apple Magic Keyboard
  - Choose the software to be installed:** Eclipse IDE, Google Chrome, Microsoft Outlook, Microsoft Office Professional, Adobe Photoshop, Adobe Illustrator, Snagit 2019

This form is called the Service Request form.

Select the required fields, add a subject, describe the service you require, and click **Add**

## Request.

Field	Explanation
SLA	Refers to how soon the service request will be delivered. If the SLA option is available, select it.
Name	Your name will be populated here.
Asset	Select from the drop-down. These are assets that are associated with you.
Template	Select from one of the pre-configured templates to save time because most of the fields will be auto-populated in a template. This option will be available if you create a new service request, without using templates.
Priority	Refers to how urgent the issue is.
Category	Select from the drop-down. Choosing the accurate category ensures quicker resolution.
Subcategory	Select from the drop-down. Choosing the accurate subcategory ensures quicker resolution.
Subject	Provide short information about the issue.
Description	Describe the issue in detail.
Resource Info	Complete details of the service requested

Make sure you answer all the resource questions, if any. This will help the IT team deliver your services efficiently.

## What is a Resource Question?

When you request for resources, the help desk may need complete details about the requested asset, such as the version, in case of software, or color or make, in case of hardware resources.

So, the resource questions aim at collecting all the necessary details for the request to be fulfilled at the earliest possible.

You can also add attachments, that are not more than 10MB in size, to the request form.

[Next >>](#)

[Track Requests: Request List View](#)

# Track Requests

After you submit your issues or service requests, you can track their status under the Requests tab. An overview of your request status; the number of requests under each status is also available under the My Request Summary widget.

## Request List View

Under the Requests tab, all issues and service requests are listed. This is called the Request List View. Here, you can track all your requests under various filters and also know the SLA-violations at a glance.

For a personalized view, you can select one of the following filters to display the requests:

- My open requests
- My requests on hold
- My overdue requests
- My pending requests
- My completed requests
- My closed requests
- All my requests
- Awaiting approval
- Waiting for my update
- Updated by me
- Pending requests shared with me
- Requests shared with me
- Missed chat requests
- Closed chat requests

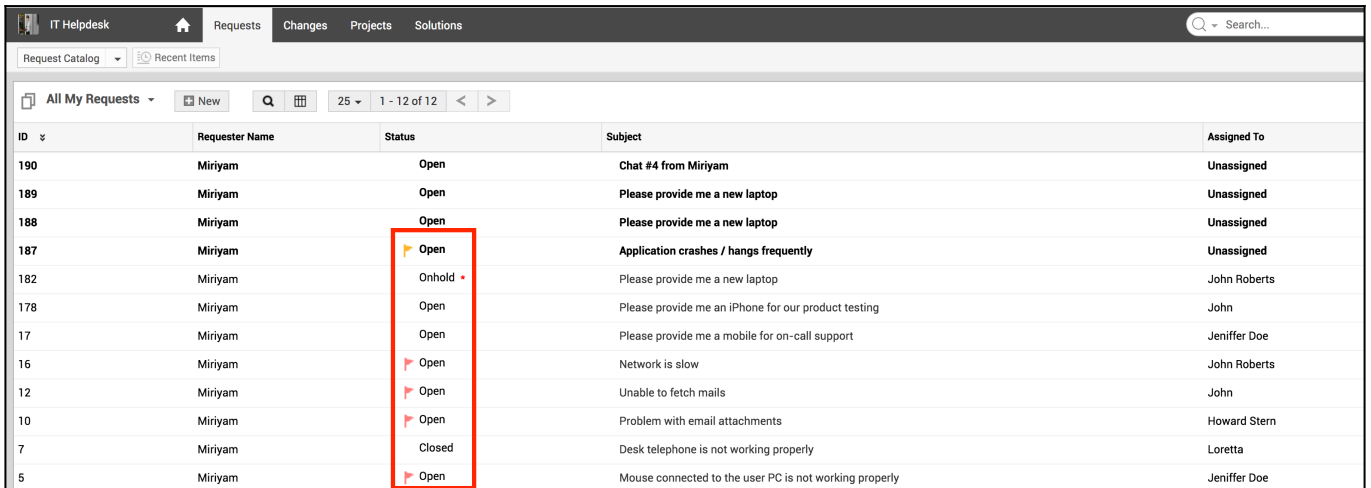
To customize the display of the Request List View information, use the Column selector button. Under this button, you can select which request information must be displayed in the List View. You can also arrange the column positions through a simple, drag and drop process.



# SLA Violations

On requests that are approaching their service level agreement (SLA), a yellow flag is displayed. On hover over, information on the request's due time is shown.

On requests that have violated their SLA, a red flag is displayed. On hover over, information on the delay is shown.



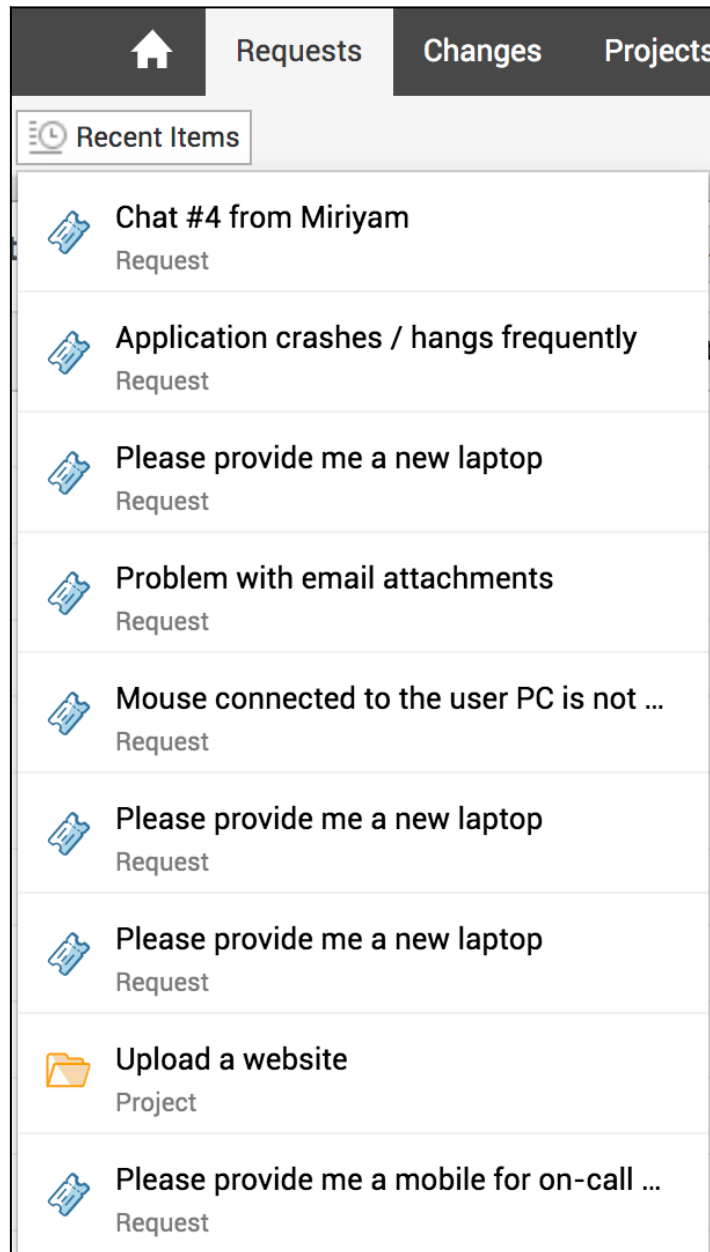
ID	Requester Name	Status	Subject	Assigned To
190	Miriyam	Open	Chat #4 from Miriyam	Unassigned
189	Miriyam	Open	Please provide me a new laptop	Unassigned
188	Miriyam	Open	Please provide me a new laptop	Unassigned
187	Miriyam	Open	Application crashes / hangs frequently	Unassigned
182	Miriyam	Onhold	Please provide me a new laptop	John Roberts
178	Miriyam	Open	Please provide me an iPhone for our product testing	John
17	Miriyam	Open	Please provide me a mobile for on-call support	Jeniffer Doe
16	Miriyam	Open	Network is slow	John Roberts
12	Miriyam	Open	Unable to fetch mails	John
10	Miriyam	Open	Problem with email attachments	Howard Stern
7	Miriyam	Closed	Desk telephone is not working properly	Loretta
5	Miriyam	Open	Mouse connected to the user PC is not working properly	Jeniffer Doe

[Next >>](#)

[Recent Items](#)

## Recent Items

The most recently accessed items, incidents and service requests, are populated under this button:

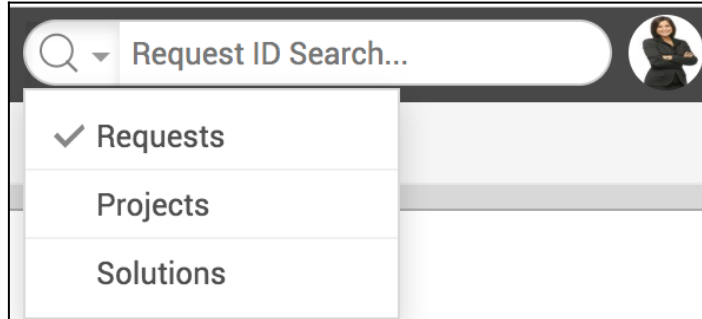


[Next >>](#)

[Search](#)

# Search

The search bar on the upper-right corner, next to the profile icon, allows you to search for requests by Request ID:





## Request Details Page

When you click any of the requests, the Request Details page will be displayed.

On this page, you can track the individual requests.

In the Request Details page, you can perform the following tasks:

- [Edit, Reply, and Print](#)
- [Add Notes and Attachments](#)
- [Reopen and close requests](#)
- [View Details, Resolution, and History](#)

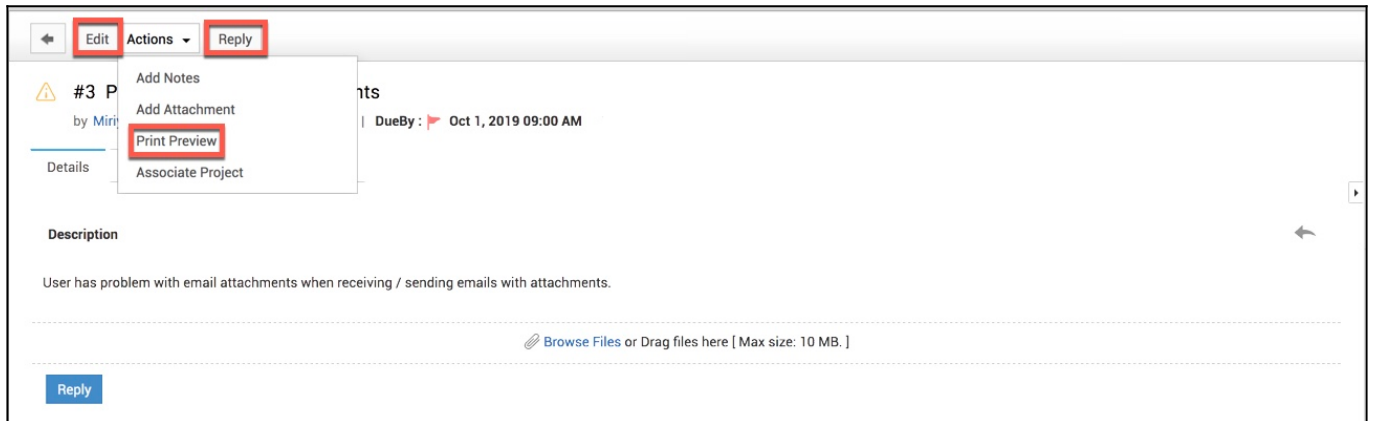
[Next >>](#)

[Edit, Reply, and Print](#)

## Edit, Reply, and Print

After logging the request, if you need to add more details to it, go to the Request Details page.

On this page, depending on your service desk admin configurations, you can edit, reply to, or print the request.



Click **Edit** to display the Request form. Then, you can make the required updates, provide a reason for the updates, and click **Update request**.

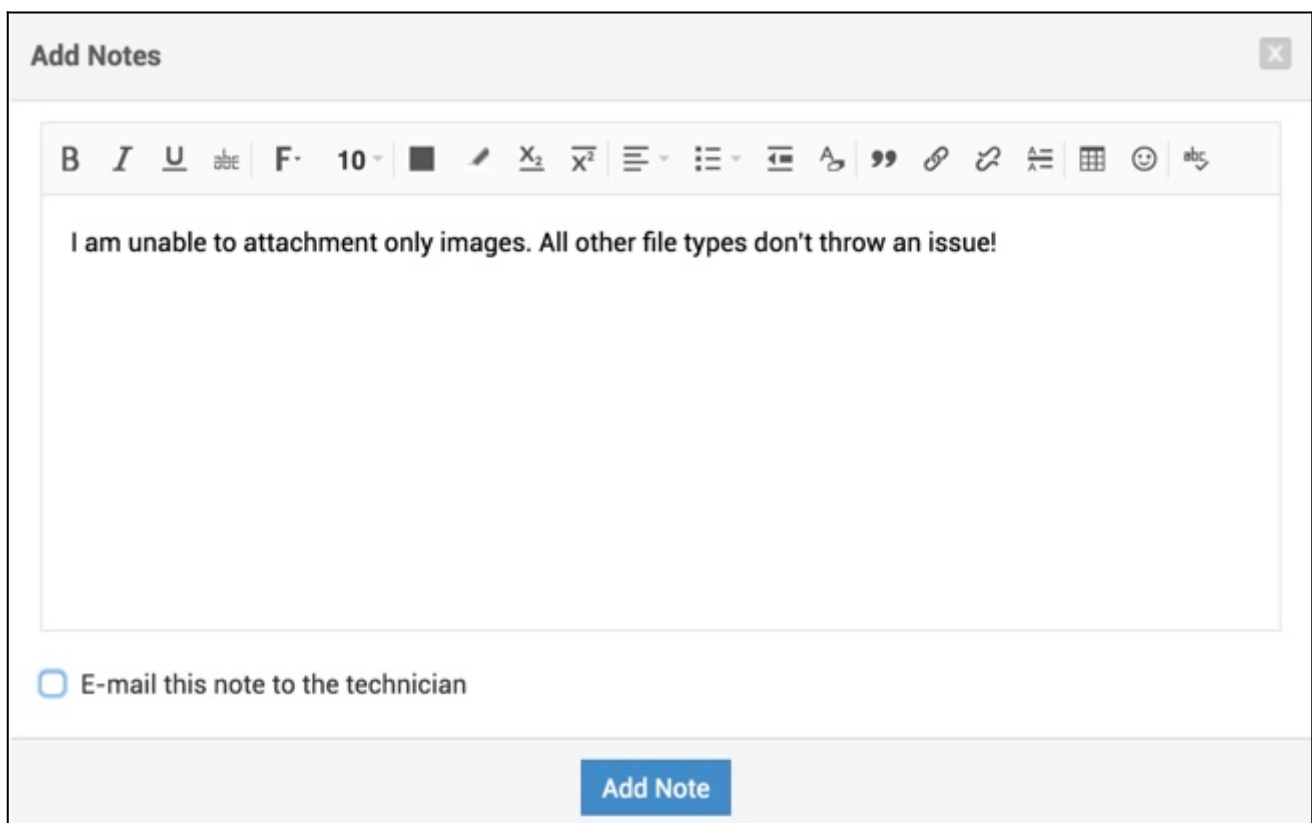
[Next >>](#)  
[Add Notes and Attachments](#)

## Add Notes and Attachments

A note is a small piece of information that a user can add to the request after the request is logged.

Under the **Actions** menu, click **Add Notes**.

You can also email the note to the technician by clicking the option in the **Add Notes** window.



**Add Notes**

**B** *I* U abc **F** 10 ■ /  $x_2$   $x^2$  ☰ ☰ ☰ A ” 🔗 🔗 📄 📅 😊 abc

I am unable to attachment only images. All other file types don't throw an issue!

E-mail this note to the technician

**Add Note**

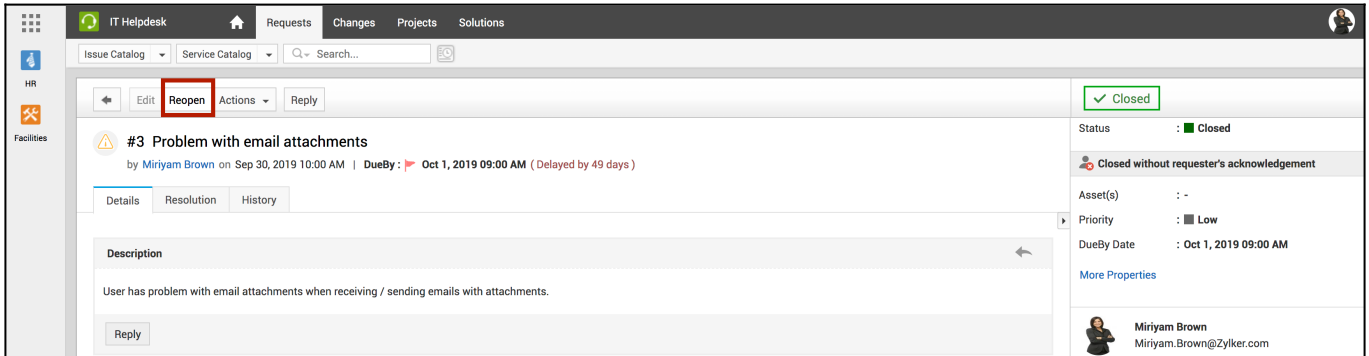
To add attachments you can either click Add Attachment under Actions or click Browse Files under Description.

**Note** that the maximum file size for attachments is 10 MB.

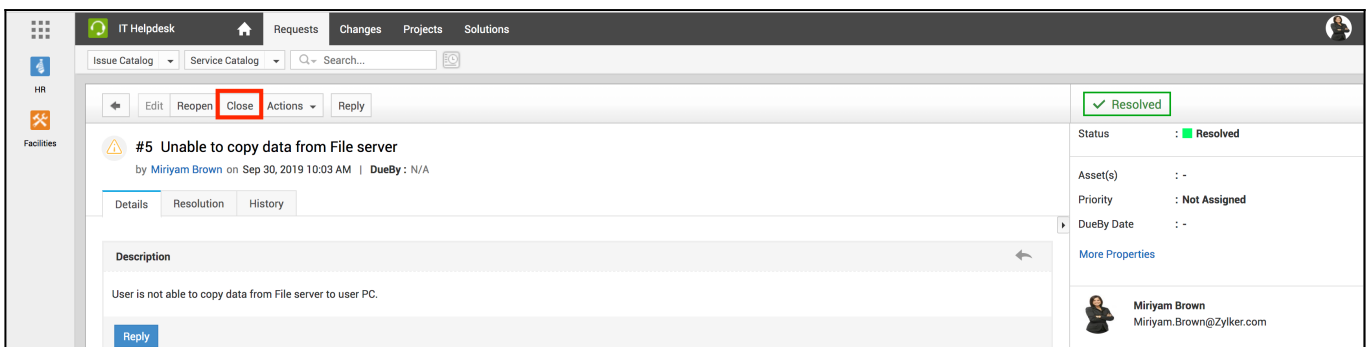
[Next >>](#)  
[Reopen and Close Requests](#)

# Reopen and Close Requests

If an issue is not resolved correctly, or if the issue persists even after the request is closed, you can reopen the request, as shown below:



You can reopen and close all your resolved requests, as shown below:



[Next >>](#)

[View Details, Resolution, and History](#)

---

## View Details, Resolution, and History

Click the respective tabs in the details page to view the Request Details, its Resolution, and its History.

The resolution, as the name implies, involves the steps the technician took to resolve the reported issue. This information is available under the Resolution tab.


Under the Conversations button, all request-related communication such as notes added, and email replies from and to the technicians are collated.

[Next >>](#)

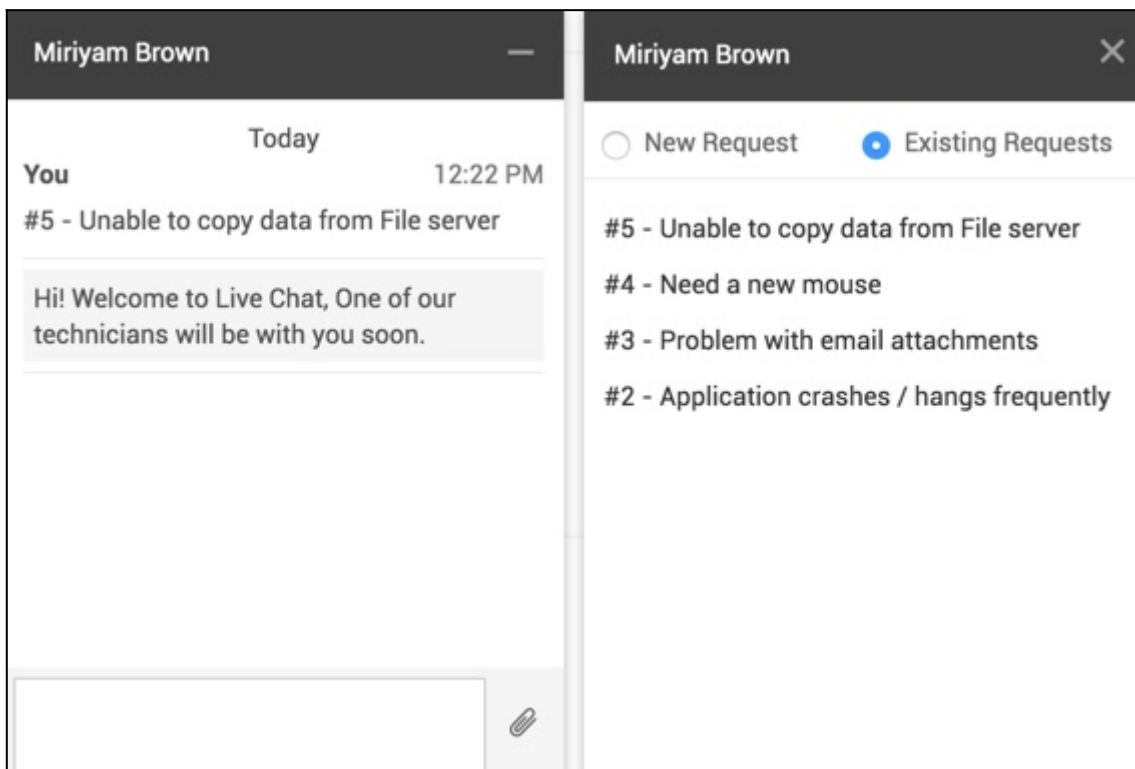
[Chat with Technicians](#)

## Chat with Technicians

In the self-service portal, you can chat with the technicians and solve your issues without raising an issue or a service request. You can also ask for information on your already logged issues.

- Click  on the lower-right corner of the self-service portal.
- On the Chat pop-up that opens, you can either select a New Request or one of your already logged requests.

For the following screenshot, an existing request was selected:



You can add attachments of not more than 10MB in size to the chat.

If the technician is unable to solve the issue over chat, the chat conversation will be easily converted into a ticket so that a more formalized resolution process can be followed.

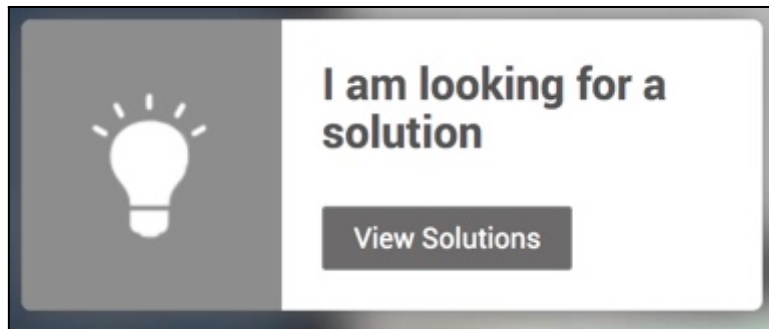
[Next >>](#)  
[Search Knowledge Base](#)



# Search Knowledge Base

In the self service portal, you can browse through the knowledge base for solutions, even before you report an issue or request for a service.

- Use keywords or topics to look for solutions. Your help desk team updates the knowledge base with possible solutions to all issues that are frequently reported. Therefore, it's quite likely that a solution to your issue already exists in the knowledge base. So, do browse through the knowledge base before raising an issue or service request.
- On the Home page, in the **I am looking for a solution** tile, click **View Solutions**.



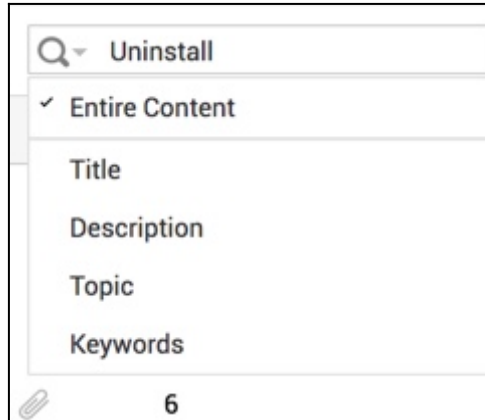
The knowledge base available under the **Solutions** tab is displayed.

All available articles, categorized by title, ID, Views, and other attributes, are listed on this page.

ID	Title	Views	Created On	Created By
1	<b>How to generate a support file</b> Topic : <b>General</b> Go to 'Support' tab. Click on 'Support File'. This will create a file with extension zip.gz. Please mail this file to servicedeskplus-support@manageengine.com	1	Sep 26, 2019 09:28...	administrator
2	<b>Customize Log In and Log Out Screens</b> Topic : <b>General</b> 1. Save the page served under http://servername-or-ipaddress:p C:\ManageEngine\ServiceDesk\applications\extracted\AdventNe Modify the index.html page as per your needs and save the file they are. 4. Edit the Web.xml file present under C:\ManageEngine\	0	Sep 26, 2019 09:30...	administrator
3	<b>How to Uninstall a Software Application</b> Topic : <b>Softwares</b> Use Windows Uninstall Wizard if you are using Windows: Go to Start -> Control Panel, and Add/Remove Programs. Wait for the list to load. Select a program you wish to uninstall and click either Remove, or Change/Remove. Follow instructions that will appear on the screen. They will differ according to the program that you are trying to uninstall. If you are prompted to confirm removal of the program, click Yes or OK.	0	Sep 26, 2019 09:32...	administrator

- You can search through these articles by using keywords, titles, topics, and descriptions.





- You can also search by using the article ID, topic, or by author (Created by).

ID	Title	Views	Created On	Created By
2				administrator
1	<b>How to generate a support file</b> Topic : <b>General</b> Go to 'Support' tab.Click on 'Support File'. This will create a file with extension zip.gzPlease mail this file to servicedeskplus-support@manageengine.com	2	Sep 26, 2019 09:28...	administrator

[Next >>](#)  
[Access Changes](#)

# Access Changes

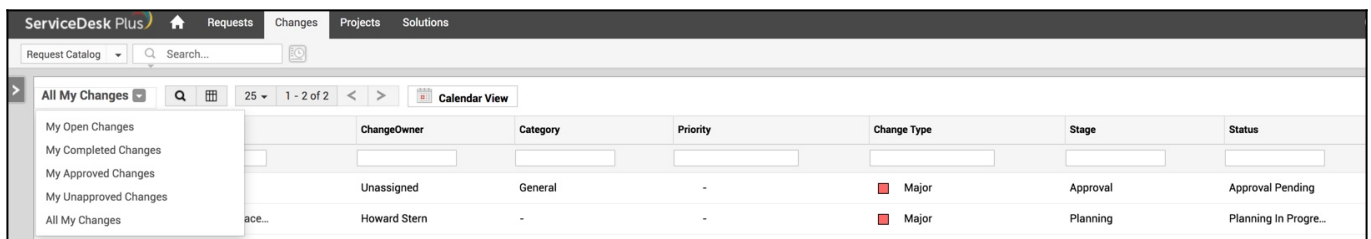
The **Change** tab is available only to users who have been assigned a **Change Role**.

A change is a planned approach to modifying an asset, service, or infrastructure in the organization, taking into account the impact the process may have on the overall organization.

For example, an ERP upgrade in your organization may lead to downtime of the ERP service. Therefore, before the upgrade, everyone who could be affected by it will be communicated, and the entire process will progress through a series of well-monitored and tracked stages to minimize the impact on the users.

So, if you have been assigned a **Change Role**, such as a **Line Manager**, you will have access to the **Changes** tab.

All Change requests in which you have a role are listed under the **Changes** tab.



Change Owner	Category	Priority	Change Type	Stage	Status
Unassigned	General	-	Major	Approval	Approval Pending
Howard Stern	-	-	Major	Planning	Planning In Progress

On this page, you can only view the change requests and keep track of their status.

There are multiple filters to display specific change requests. You can also search through the change requests by ID, Change Owner, Category, Priority, Change Type, Stage, and Status.

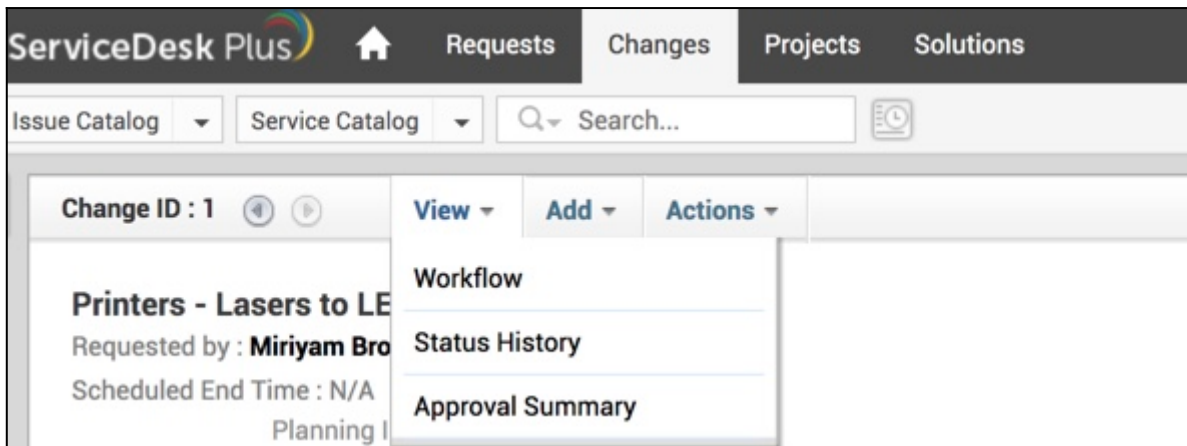
[Next >>](#)  
[Change Details](#)

## Change Details

Click any Change to view its stage-specific details.

On this page, you can perform the following:

- View the associated workflow, status history, and approval summary.



- Add a note, print, send notifications, and associate projects to the Change Request.

[Next >>](#)  
[Associate Projects](#)

## Associate Projects

To associate a project to a change, you must have the relevant permissions. A change is a much larger process, which may have to be broken down into smaller, workable projects. These projects are essentially sub-parts of the Change, and therefore must be associated with the Change Request.



- Click **Associate Project**.

The Project tab with all the projects listed will be displayed.

- Select the project to be associated with this change and click **Associate**.

[Next >>](#)  
[Manage Projects](#)

# Manage Projects

The Project tab is available to users who have been assigned a Project Role.

Requesters can be assigned any one of the following project roles:

- Project Admin
- Project Manager
- Team Leader
- Team Member
- Custom Project Role

Each one of these roles has different permissions and levels of access to the projects.

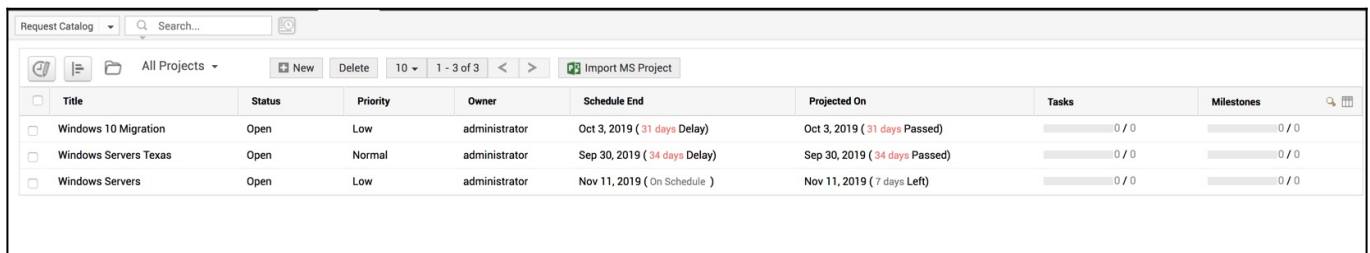
The following table details the roles and responsibilities of each of the Project Roles:

Role	Description
Project Admin	<ul style="list-style-type: none"><li>• Access all projects</li><li>• Add, edit, and delete projects</li><li>• Add Project Members</li><li>• Assign roles to members</li><li>• Add milestones</li><li>• Add tasks and define task dependencies</li></ul>
Project Manager	<ul style="list-style-type: none"><li>• Access one or more projects</li><li>• Edit assigned projects</li><li>• Add Project Members</li><li>• Add milestones</li><li>• Add tasks and define task dependencies</li></ul>

<p>Team Leader</p>	<ul style="list-style-type: none"> <li>• Can access assigned milestones</li> <li>• Can edit milestones</li> <li>• Add tasks to milestones</li> <li>• Reassign tasks</li> <li>• Organize tasks and define task dependencies</li> </ul>
<p>Team Member</p>	<ul style="list-style-type: none"> <li>• Can access tasks</li> <li>• Can edit or work on Tasks</li> </ul>
<p>Custom Role</p>	<ul style="list-style-type: none"> <li>• Based on the project role</li> </ul>

All projects are listed under the Projects tab.

On this page, you can add new projects, keep track of all projects and their milestones, and also import from MS projects.



Title	Status	Priority	Owner	Schedule End	Projected On	Tasks	Milestones
Windows 10 Migration	Open	Low	administrator	Oct 3, 2019 ( 31 days Delay)	Oct 3, 2019 ( 31 days Passed)	0 / 0	0 / 0
Windows Servers Texas	Open	Normal	administrator	Sep 30, 2019 ( 34 days Delay)	Sep 30, 2019 ( 34 days Passed)	0 / 0	0 / 0
Windows Servers	Open	Low	administrator	Nov 11, 2019 ( On Schedule )	Nov 11, 2019 ( 7 days Left)	0 / 0	0 / 0



# Add Projects

**Role Required:** Project Admin and specific roles with explicit permissions

- Under the **Projects** tab, click the **New** button.

The project form will be displayed, as shown below:

The screenshot shows the 'New Project' form in ServiceDesk Plus. The form is titled 'New Project' and has a search bar at the top. The 'Project Templates' dropdown is set to 'OS Upgrade'. The 'Title' field contains 'Windows Servers'. The 'Project Description' field contains 'Windows servers upgrade needs to be completed at the earliest possible.' The 'Project Code' is 'SW122', 'Site' is 'Not associated to any site', 'Project Type' is 'Infrastructure', 'Schedule Start' is '05 Nov 2019' to '07 Nov 2019', 'Requested By' is 'Miriyam', 'Actual Start' is '05 Nov 2019' to '06 Nov 2019', 'Projected On' is '04 Nov 2019', 'Status' is 'Open', 'Owner' is 'Miriyam Brown', 'Priority' is 'High', 'Estimated Hours' is '8', 'Department' is 'Software', 'Actual Hours' is empty, 'Estimated cost (\$)' is '15', and 'Actual Cost (\$)' is '10'. At the bottom, there are buttons for 'Save', 'Save and Add New', and 'Cancel', along with a 'Live Chat' icon.

You can either create a new project from scratch or use one of the project templates.

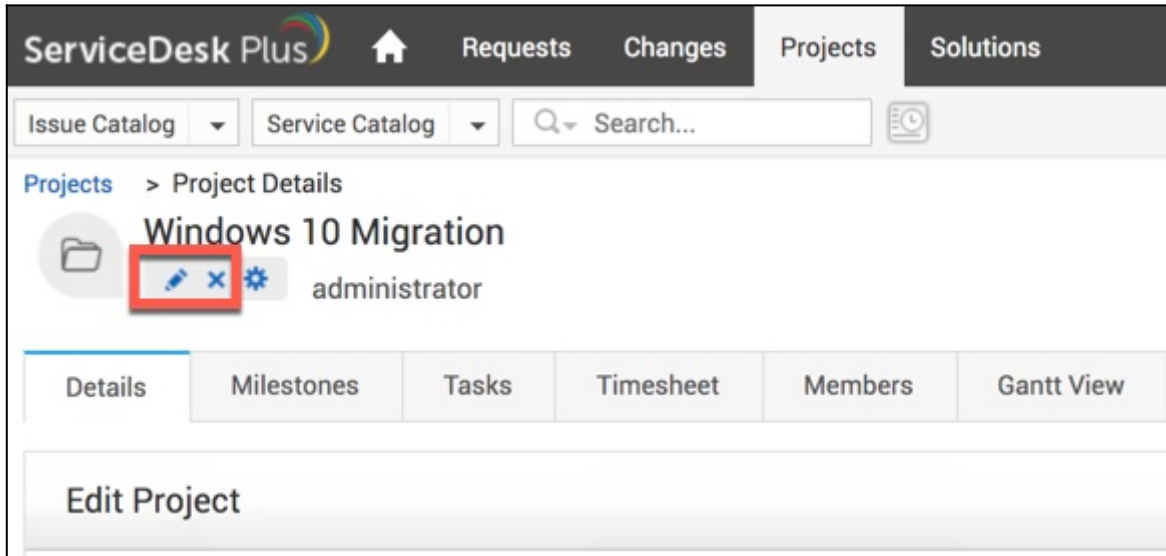
- After you fill out all the required details, click **Save**.
- After you add the project, you'll need to define the associated Milestones, Tasks and their dependencies, and add Members to the project.

[Next >>](#)  
[Edit/Delete Projects](#)



## Edit/Delete Projects

To edit or delete any project, click the project, and click the edit or delete icon inside the project details page.



You can bulk delete projects in the list view by selecting all the projects that must be deleted.

[Next >>](#)  
[Add Milestones](#)

# Add Milestones

Milestones and tasks make the monitoring and management of projects easy and simple.

Adding milestones and tasks to projects helps break down a project into manageable chunks.

Project managers will also be able to see how close a project is to its completion and also check if the project is on schedule.

- After you create a project, go to the **Milestone** tab and click **Add New**.
- Fill out the following page and click **Save**.

The screenshot shows the 'New Milestone' form in the ServiceDesk Plus interface. The form is for a project named 'Windows Servers'. The title field is 'Windows Server Upgrade Phase 1'. The description field contains the text 'This will be the phase 1 of the project.' The status is 'Open', the owner is 'Miriya Brown', the priority is 'High', and the estimated hours are '15'. The schedule start is '06 Nov 2019' and the projected on date is '05 Nov 2019'. There are buttons for 'Save', 'Save and Add New', and 'Cancel' at the bottom.

After you save the Milestone, you can add attachments that are not more than 10MB in size.

The screenshot shows the ServiceDesk Plus interface. At the top, there is a navigation bar with 'ServiceDesk Plus' logo and a home icon, followed by tabs for 'Requests', 'Changes', 'Projects', and 'Solutions'. Below the navigation bar, there are dropdown menus for 'Issue Catalog' and 'Service Catalog', and a search bar. The main content area shows a breadcrumb trail: 'Windows Servers' > 'Milestone Details'. The title of the milestone is 'Windows Server Upgrade Phase 1', created by 'Miriyam Brown'. Below the title, there are tabs for 'Details', 'Tasks', 'Timesheet', 'Comments', and 'History'. The 'Details' tab is active, showing a text block: 'This will be the phase 1 of the project.' Below this is a table with project details:

Priority	High
Created by	Miriyam Brown
Schedule Start	Nov 6, 2019
Schedule End	Nov 26, 2019 ( 21 days Ahead )
Projected On	Nov 5, 2019
Estimated Hours	15

Below the table, there is a section for 'Milestone Attachments' with an 'Attach File' button. An 'Attach file' dialog box is open, showing a 'File' field with a 'Choose file' button and 'No file chosen' text. Below the file field, there is a red warning message: '[ Maximum size of an attachment is 10 MB. ]'. There is also a 'Description' field and an 'Attach file' button at the bottom of the dialog.

[Next >>](#)  
[Add Tasks](#)

## Add Tasks

A task is a discrete piece of work under a larger project.

Under milestones, you can define any number of tasks and define their dependencies.

This helps in the smooth completion of a project.

There are two ways to create tasks under projects.

You can add tasks in the **Project Details** page or under **Milestones**.

[Next >>](#)  
[Milestone Tasks](#)

# Milestone Tasks

**Role Required:** Project Admin, Project Manager, Team Leader

Tasks added under Milestones are Milestone tasks, and any dependencies defined between these tasks will be removed when their associated milestones are modified.

- To create a Milestone task, go to the **Tasks** tab under any Milestone and click **Add New**.
- Fill out the displayed form as shown below and click **Save**.

The screenshot shows the 'New Task' form in ServiceDesk Plus. The form is titled 'New Task' and has a 'Use Task Template' dropdown set to 'Change the phone number mapping'. The form fields are as follows:

- Title:** Change the phone number mapping
- Status:** Open
- Description:** To change the phone number mapping  
User name :  
User ID :  
Current Location :  
New Location :
- Estimated Effort:** 0 Days, 0 Hrs, 0 Mins
- Priority:** -- Select Priority --
- Scheduled Start:** From [calendar icon] - To [calendar icon]
- Associated Milestone:** Windows Server Upgrade Phase 1  
[Nov 5, 2019 - Nov 26, 2019]
- Owner:** -- Select Owner -- [Mark Assign]
- Task Type:** -- Select Task Type --
- Attachments:** Attach file

At the bottom of the form, there are three buttons: Save, Save and Add New, and Cancel.

[Next >>](#)  
[Project Tasks](#)

# Project Tasks

**Role Required:** Project Admin, Project Manager

- To create Project Tasks, click any project and go to the **Tasks** tab.
- Click **New Tasks** or **Add Tasks from Template**.
- Fill out the displayed form as shown below and click **Save**.

If you have associated this task to a Milestone, it will appear under the specific Milestone tasks.

The screenshot shows the 'New Task' form in ServiceDesk Plus. The form is titled 'New Task' and has a navigation bar with tabs: Details, Milestones, Tasks, Timesheet, Members, Gantt View, Comments, Associations, and History. The 'Tasks' tab is selected. The form includes the following fields and options:

- Title:** Check the network connectivity
- Status:** Open
- Description:** Check whether all the connectivities to this device are proper. Device name :
- Estimated Effort:** 3 Days, 0 Hrs, 0 Mins
- Associated Milestone:** Windows Server Upgrade Phase 1 (Nov 5, 2019 - Nov 26, 2019)
- Priority:** Low
- Owner:** -- Select Owner -- (Mark Assign)
- Scheduled Start:** From [ ] - To [ ]
- Actual Start:** From [ ] - To [ ]
- Task Type:** Maintenance
- Additional Cost (\$):** 0.0
- % of Completion:** [ ]
- Comments:** [ ]
- Notify before scheduled start:** 45 mins
- Attachments:** Attach file

At the bottom of the form, there are three buttons: Save, Save and Add New, and Cancel.

[Next >>](#)  
[Task Dependencies](#)

# Task Dependencies

When there are multiple tasks under a milestone, you can configure dependencies between the tasks. Dependencies are necessary because the completion of one task may be required even to begin the next task. For example, the task 'Installing software' can even begin only when the task 'Procuring the software' is completed.

Task dependencies can be defined for only milestone tasks and not for project tasks, which do not have an associated milestone.

To define task dependencies, select a milestone, click the Tasks tab, and then click the Dependencies button.

The dependencies map will be displayed where you can define the parent-child dependency between the tasks under the milestone.

As shown in the following screenshot, place the mouse pointer over a task, which will now be highlighted in yellow, and then select its parent, from the tasks highlighted in green.

Dependencies Map

Click a selectable(green) task to set as parent for task shown in yellow. Press Esc to un-select.

Export



[Next >>](#)

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[Organize Tasks](#)

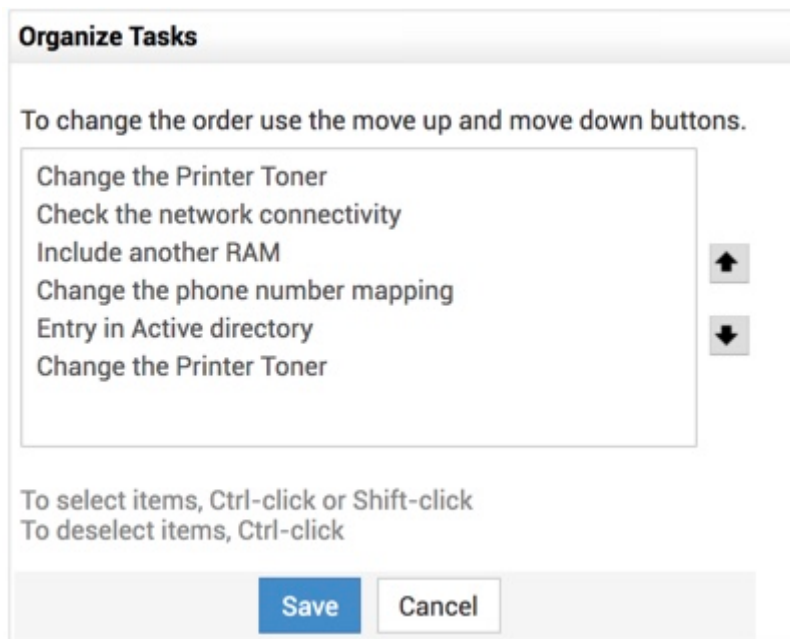


# Organize Tasks

Task dependency helps decide which task depends on what, giving a structure to the project. However, organizing the tasks helps decide the order in which the tasks must be executed.

Under **Milestone** tasks, click **Actions>>Organize**

On the displayed page, use the up-down arrows to modify the order of the tasks.

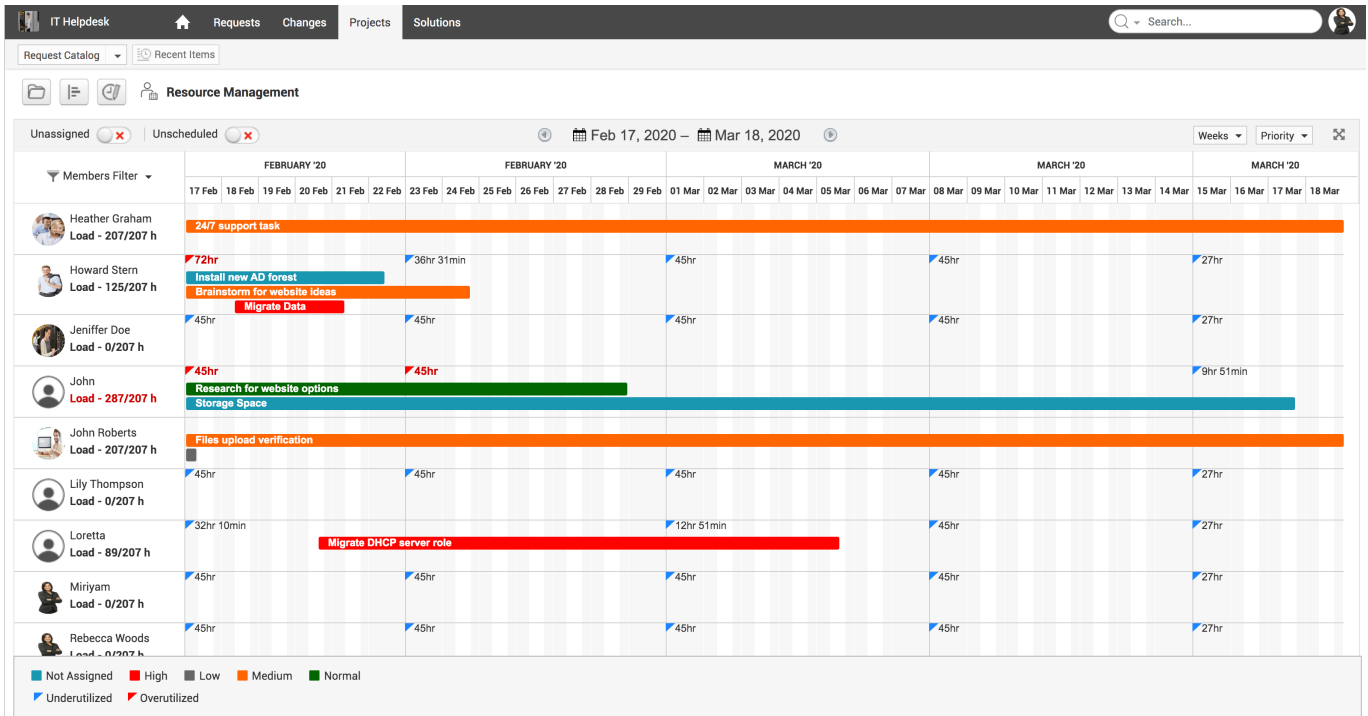


[Next >>](#)

[View Resource Management](#)

# View Resource Management

Click **Resource Management** to get an overview of how tasks are allocated to the technicians across projects or in a specific project.



A simple drag-and-drop method enables you to move the tasks between resources so that the right technician is allocated with the right task.

Note that you can make these modifications only if you have specific project role permissions.

[Next >>](#)  
[Add Members](#)

# Add Members

To complete a project successfully, you need an efficient team with clearly defined functions and roles. As seen earlier, there are different project roles. You can add any number of members to a given project and assign specific roles to them.

**Role Required:** Project Admin, Project Manager

Click any project and go to the **Members** tab.

Click **Add Members**.

The available users will be listed. Select the users you want to add to the project, assign their project roles, and click **Add**.

<input type="checkbox"/>	Name	Project Role	Employee ID	Job title	Site	Department Name	E-mail
<input type="checkbox"/>	Guest	-	888	-	-	-	-
<input checked="" type="checkbox"/>	Heather Graham	-	011	-	-	-	-
<input checked="" type="checkbox"/>	Howard Stern	-	013	-	-	-	-
<input type="checkbox"/>	Jennifer Doe	-	014	-	-	-	-
<input type="checkbox"/>	John Roberts	-	012	-	-	-	-
<input type="checkbox"/>	Miriyam Brown	Project Admin	1874	Data Center Manager	-	Engineering	Miriyam.Brown@Zyfler.com
<input type="checkbox"/>	Shawn Adams	-	010	-	-	-	-

After adding all the project members, you can update their roles and mark them as Active or Inactive on the Members List View.

<input type="checkbox"/>	Project Member	Project Role	User Status	Employee ID	Job title	Site	Department Name	E-mail
<input type="checkbox"/>	Howard Stern	Team Member	Active	013	-	-	-	-
<input type="checkbox"/>	Jennifer Doe	Team Member	Active	014	-	-	-	-
<input type="checkbox"/>	John Roberts	Team Member	Active	012	-	-	-	-
<input type="checkbox"/>	Miriyam Brown	Project Admin	Active	1874	Data Center Manager	-	Engineering	Miriyam.Brown@Zyfler.com

[Next >>](#)

[View Gantt Chart](#)

# View Gantt Chart

A Gantt Chart is an overview of a project that is presented on a horizontal bar chart.

In a glance, you will be able to evaluate the project status by Tasks, Members, and Milestones.

To update any task or its project from the Gantt View, click the specific task to open its Task Details page.

Priority	High	Status	In Progress
Task Type	Implementation	Owner	-
% of Completion	0	Actual Start	-
Scheduled Start	Feb 14, 2020 02:40 AM	Actual End	-
Scheduled End	Feb 16, 2020 02:35 AM	Additional Cost (\$)	0.00
Estimated Effort	-	Created Time	Feb 11, 2020 11:12 AM
Created By	Rebecca Woods		

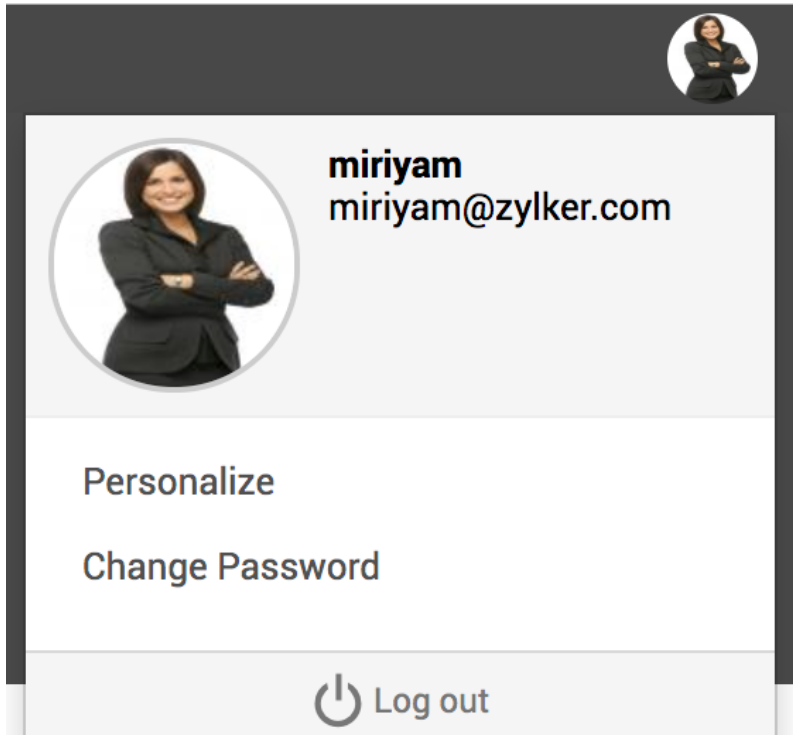
[Next >>](#)

[Update Your Personal Details](#)

## Update Your Personal Details

You can update all your personal details in the self service portal.

Click the user icon on the upper-right corner to access your personal details.



### Upload Profile Picture

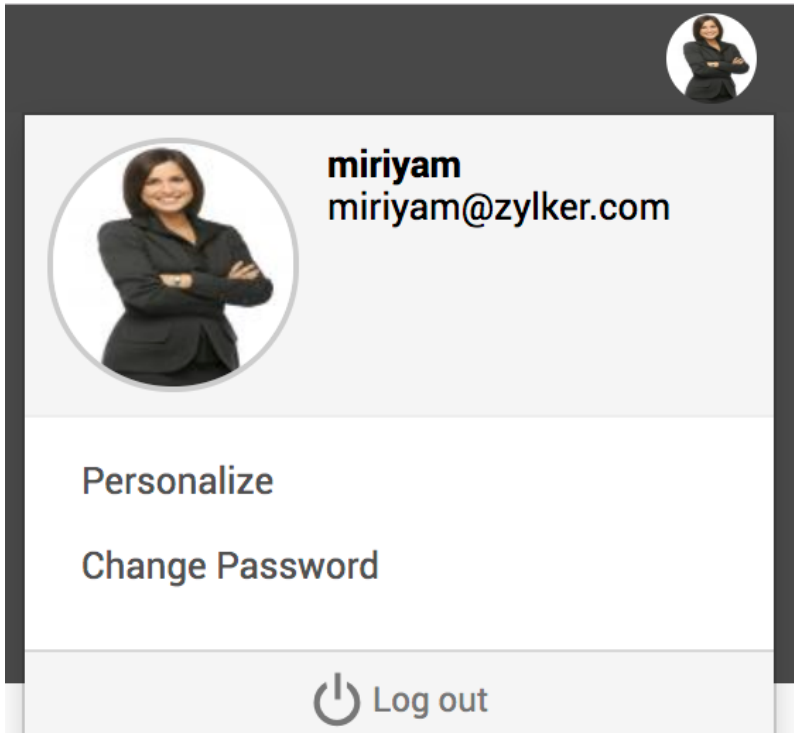
Click the profile icon and upload your profile picture.

You can use .jpg, jpeg, png, or .bmp files that are not more than 5MB in size.

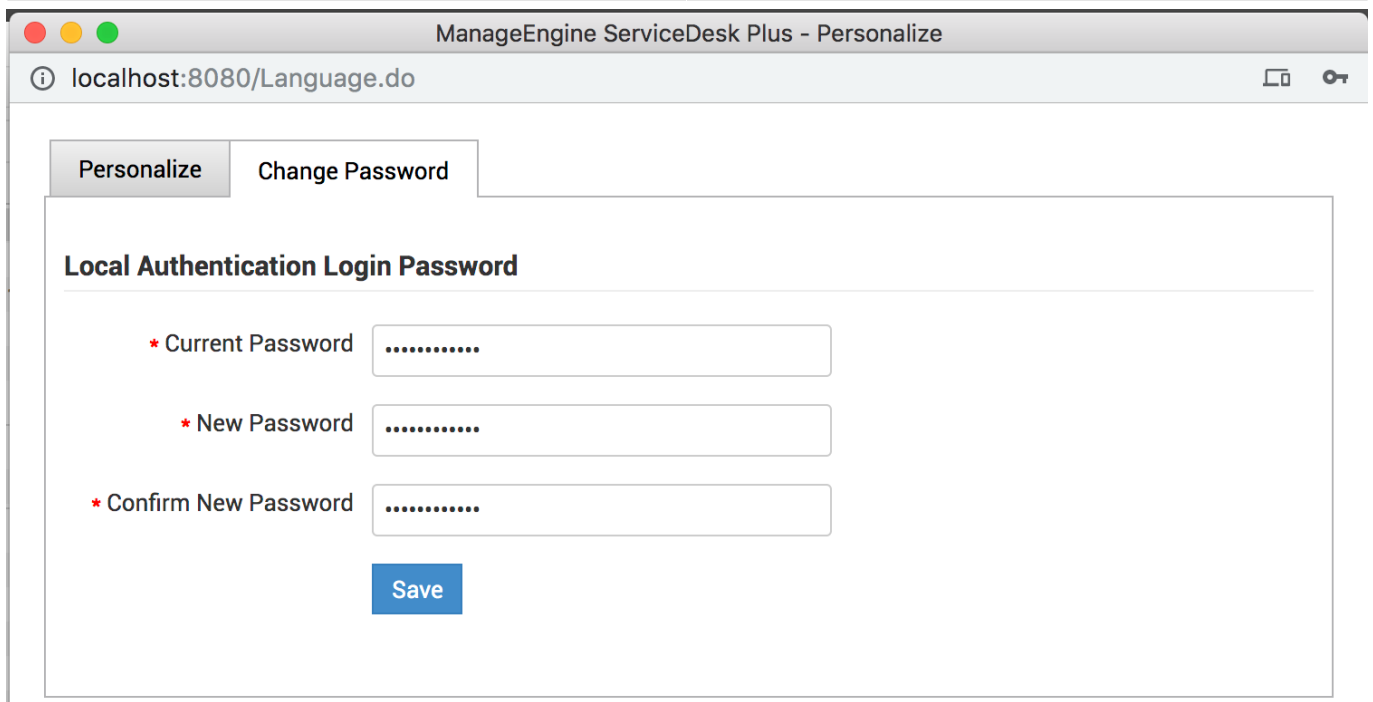
[Next >>](#)  
[Update Password, Time Zone...](#)

# Change Password, Time Zone, Date-Time Format, and Language

- Click the user icon on the upper-right corner and click **Personalize**.



- On the displayed window, under the **Password** tab: Provide the current password, followed by the new password.

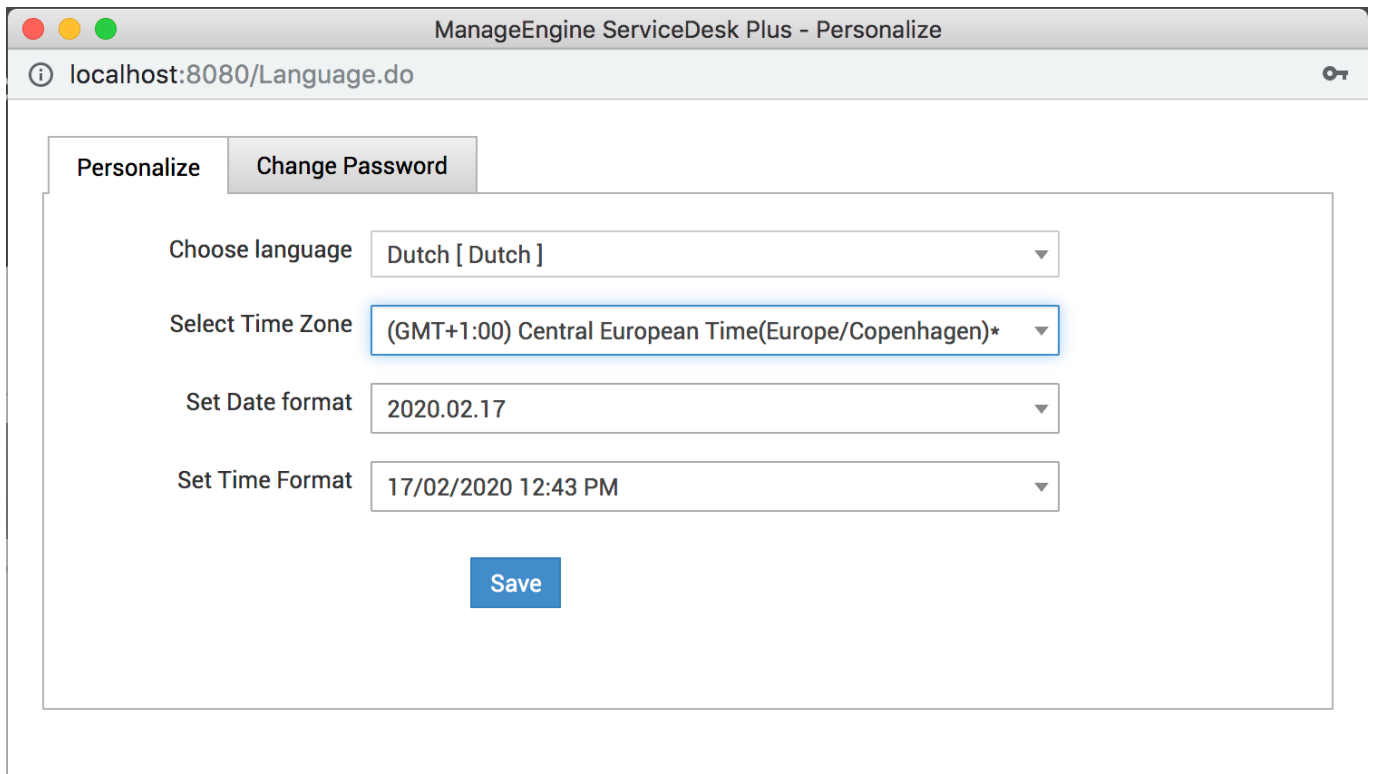


The screenshot shows a web browser window titled "ManageEngine ServiceDesk Plus - Personalize" with the address bar displaying "localhost:8080/Language.do". The page has two tabs: "Personalize" (selected) and "Change Password". Under the "Personalize" tab, there is a section titled "Local Authentication Login Password". This section contains three input fields, each with a red asterisk indicating a required field: "Current Password", "New Password", and "Confirm New Password". Each field is filled with a series of dots. Below the input fields is a blue "Save" button.

This section will be available only when local authentication is enabled for ServiceDesk Plus. If local authentication is disabled, any password changes will take effect only for local authentication purposes and will not be updated in the Active Directory or SAML.

- Under the **Personalize** tab, you can modify the language of the application, along with its time zone and the date-time format.





The screenshot shows a web browser window titled "ManageEngine ServiceDesk Plus - Personalize". The address bar displays "localhost:8080/Language.do". The page has two tabs: "Personalize" (active) and "Change Password". Below the tabs, there are four dropdown menus for configuration:

- Choose language: Dutch [ Dutch ]
- Select Time Zone: (GMT+1:00) Central European Time(Europe/Copenhagen)\*
- Set Date format: 2020.02.17
- Set Time Format: 17/02/2020 12:43 PM

A blue "Save" button is located below the dropdown menus.

You can modify the language of the application only if your organization owns a multi-language license for ServiceDesk Plus.

[Next >>](#)

[FAQs](#)

## FAQs

### [What is the difference between an incident request and a service request?](#)

Incident Request - An incident is anything that disrupts normal business activity and requires the attention of the help desk.

Service Request - A formal communication that is used to request any service from the help desk. Unlike issues, service requests are not used for things that affect normal business activity.

### [What is Request Catalog and how is it different from the Service Catalog and the Incident Catalog?](#)

Request Catalog lists both Incident and Service Templates, whereas Service Catalog and Incident Catalog list service templates and incident templates respectively. At any point in time, you will have the Request Catalog or the Service Catalog and the Incident Catalog.

### [How do I report an incident for which a template is not available?](#)

You can use the **Default Template** to report any incident request.

### [How do I track the Service Level Agreement \(SLA\) for my requests?](#)

In the request list view, on requests that are approaching their SLA, a yellow flag will be displayed. On hover over, information on the request's due time will be shown.

On requests that have violated their SLA, a red flag is displayed. On hover over, information on the delay is shown.

### [What is request summary in the home page?](#)

Request summary provides the following information of yours:

- Pending - Your in-progress requests
- Awaiting Approval - Tickets that need your approval action (this list will be available only if you're configured as an approver)
- Awaiting Updates - Requests that need your update (this list will be available only if you're tagged as the request editor)

### [Can I change the language of the self-service portal?](#)

Yes, you can display the application in different languages. Click your profile picture at the top right corner > **Personalize** > **Choose Language**.

**Note that you can modify the language of the application only if your organization**

owns a multi-language license for ServiceDesk Plus.

### [How do I change my account password?](#)

Click your profile picture at the top right corner > **Change Password**.

Note that this section will be available only when local authentication is enabled for ServiceDesk Plus. If local authentication is disabled, any password changes will take effect only for local authentication purposes and will not be updated in the Active Directory or SAML.

### [How do I raise a request through Live Chat?](#)

Open **Live Chat**, choose **New Request**, and initiate a chat. One of the online support agents will pick up the chat and gather your request details. Then the technician will log your request into ServiceDesk Plus.

### [Where do I place payroll requests?](#)

You can raise payroll requests in the HR portal. The HR instance will be listed in the sidebar if you're part of that instance; click the instance to access it. If you don't have access to the HR portal, please contact your administrator.

### [Where can I update my details?](#)

Click the profile icon and upload your profile picture. You can use .jpg, jpeg, png, or .bmp files that are not more than 5MB in size.

Under **Personalize**, you can update your account password, time zone, date-time format, and language.

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[ServiceDesk Plus Glossary](#)

## Glossary

Last updated on 17 February 2020

This short glossary is a collection of useful and accessible definitions of terms that we use in ServiceDesk Plus. Where applicable, information on where the term may be used and the feature that uses it is provided for a better context.

[A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#)

### A #

#### Announcements #

Announcements are company-wide messages or information from the help desk that are displayed on the Home Page of the self-service portal.

### C #

#### Change #

A planned activity that could affect IT services. Change usually involves addition, modification or removal of an asset, service, or infrastructure within an organization.

### G #

#### Gantt Chart #

Gantt chart is a horizontal bar chart that is used to track the progress of a project based on project tasks, milestones, and time.

### I #

#### Issue #

An issue is anything that disrupts normal business activity and requires the attention of the help desk. It could be classified as a low, medium, or high-risk event. In ITIL, it's popularly known as an incident.

#### Issue Catalog #

A ready-to-use collection of predefined templates of issues/incidents.

## **K #**

### **Knowledge Base #**

An up-to-date searchable repository of solutions for commonly encountered issues and previously recorded issues.

## **L #**

### **LiveChat #**

A chat feature that enables users to interact with technicians. It's available on the lower-right corner of the self-service portal.

## **M #**

### **Milestone #**

A milestone marks a significant event in a project. It is used to group project tasks, establish relationships between them, and define task dependency.

## **N #**

### **Notes #**

Notes are used to supply small pieces of additional information to already placed requests. It can be accessed from the Actions drop-down menu on the request details page.

## **P #**

### **Print Preview #**

A feature that enables users to examine the printable version of requests before printing. It can be accessed from the Actions drop-down menu on the request details page.

### **Profile Picture #**

Profile pictures are user-customizable images that serve as an identity. It appears on the upper-

right corner of the self-service portal. It also appears in interactions like chat for easy recognition of users.

### **Project #**

A change request is broken down into smaller workable sub-parts called projects. It is essentially a set of tasks organized to accomplish a common goal. To work on a project a user must be assigned a project role.

### **Project Role #**

To manage a project efficiently, members of the project are assigned unique project roles like Project Admin, Project Manager, and Team Leader. Different roles have different levels of access or permission to the project.

### **R #**

### **Request Catalog #**

A ready-to-use collection of predefined templates for both issues and service requests.

### **S #**

### **Self Service Portal #**

A support portal that enables users to raise requests, find solutions, manage projects, and interact with technicians.

### **Service Request #**

A formal communication that is used to request any service from the help desk. Unlike issues, service requests are not used for things that affect normal business activity.

### **T #**

### **Task #**

A discrete piece of work or activity that can be done in a project.

### **Task Dependency #**

It is a logical relationship between tasks that is used to define the order of completion of each

task.

### **Template #**

A ready-to-use form with auto-populated fields that is available for various tasks, projects, issues, and service requests. The users can take advantage of templates to save time and effort spent in creating the forms from scratch.