

ManageEngine ServiceDesk Plus User Guide



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Introduction

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

To make the process of reporting the issues to the IT help desk easier, ManageEngine ServiceDesk Plus provides you with a Self-Service Portal where you can log your complaints and issues online with the help of a web-based form. Once you have filed your issue, it gets listed in your request view page, where you can keep track of the logged issue. You can also update your personal information using the Self-Service Portal. In the Self-Service Portal, you will be able to access the following modules:

Requests: You can create a new request and view the same. Also all the requests that you have raised till date will be saved in your requests module for future references.

Solutions: From the solutions knowledge base that has been developed and maintained by your IT help desk team, you can search for solutions for the issue that you are currently facing. If you do not find any solution for the problem at hand, then you can post your issue as a request to the help desk team.

My Details: You can view and edit your account details including your password. This updated information will be displayed whenever your information is requested.

Requests

ManageEngine ServiceDesk Plus provides you a Self-Service Portal with the request module. Here, you can create new requests to post your concerns and issues to the IT help desk team. You can also view the request that you have posted and keep track of its status. Once the request is closed, you can view the same in the closed requests.

Creating a New Request

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

To create a new request using the web-based form

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

Requester Details

In this block, your name and the workstation that has been associated with you are displayed. The **Name**, **Contact number** and **Site** is non-editable. From the **Workstation** drop-down list, select the workstation to which the issue that you are submitting is related. Depending on the configurations set by the ServiceDesk Plus administrator, the workstation list will have all the available workstation in your organization or it may have only the workstations that are associated with you. Selecting the workstation is not a mandatory requirement. Only if the issue is related to the workstation, you need to select it.

Classifying Request Category

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

Describe Request

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

Add Attachments to the Request

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



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

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

Additional Fields

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

Modes of Creating a Request

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

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

Viewing a Request

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

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Request** tab in the header pane. The next page lists all the requests raised by you in the ServiceDesk Plus application. If there are any requests that have not been assigned any technician then they will appear in bold font.
3. Click the **Title** of the request that you want to view. This opens the **View Request** page.
4. The request header has the request ID, category of the request, level, its status, and priority. Then the requester name, due date, request summary, and request description are displayed. Below this, the request details containing mode of request, technician attending to the request, created date, and due date are displayed. Finally, the requester details are displayed below the request details block. If there are any attachments to request, click on the file that is attached to view the same.
5. Click the **Resolution** tab to view the resolution for the request.
6. To view the history of the request, click the **History** tab.
7. To view all the replies that have been sent to you, click the **Replies** tab in the center pane. All the notifications will be listed in the ascending order of the date and time when they were sent.

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

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

Printing the Request

To print a request,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Request** tab in the header pane.
3. Click the **Subject** link of the request that you want to print.
4. Click Actions combo box on the right hand side of the page. Click **Print Preview** option. The print preview of the request is opened in a pop-up window.
5. Click the **Print** menu item from the browser **File** menu list.
6. The default printer associated with your workstation is invoked. Set the required options and click **OK**. You can collect the printed copy of the request at the printer that is linked to your workstation.

Adding Notes

After posting a request, if you want to add additional information about the request, use **Add Notes**.

To add a note to a request,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Request** tab in the header pane.
3. Click the **Subject** link of the request to which you would like to add a note.
4. In the **View Request** page, on the right side **Tasks** block, click the **Add Notes** link. The **Add Notes** pop-up window is displayed as below:

5. Enter your content in the text box below the **Request ID**.
6. If you wish to notify the technician in-charge of your request about the addition of the note, then select the check box **E-mail the technician for notes addition**.
7. Click **Add Note**. The note is added at the bottom of the request along with a date and time stamp. Your name is also displayed.

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



Note: You will not be able to delete any of the notes in a request even though you have added them. Only technicians can delete the notes added to a request.

Viewing Request Resolution

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

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

Viewing Request History

The various actions performed on a particular request are stored in the request history for future reference and auditing purposes.

To view the request history,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Request** tab in the header pane.
3. Click on the **Subject** link of the request for which you need to know the complete history.
4. In the **View Request** page, click the **History** tab in the center pane. This displays the complete history of actions that were performed on the request from the time of its creation.

The details that are displayed in the History are in the ascending order with the earliest performed action shown at the top of the page and the latest action at the bottom of the page.

Viewing the Requester Details

1. Click the **Request** tab in the header pane.
2. Click the **Title** of a request.
3. Click the **Requester Name** link in the **Requester Details** block. The **View Requester Details** window pops up where you can view details, such as name, designation, employee ID, department to which the requester belongs, e-mail ID, and phone and mobile numbers.

Technician details - radhika



radhika

Employee ID :1158

Department Name	Engineering
E-mail	r radhika@adventnet.com
Phone	8888
Mobile	988425057
Description	No Description

4. Once you have finished viewing the details, click the **Close** link.
- Alternatively, you can also click the **My Details** tab in the header pane to view your personal details.

Viewing all Replies

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

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Requests** tab in the header pane.
3. Click the **Title** of the request for which you wish to check the conversations.
4. In the **View Request** page, the various mails between you and the technician in-charge will be displayed under the head **Conversations**.

Viewing Survey Results

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

To view the survey results,

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

**Note:**

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

Viewing Requests based on Filters

ManageEngine ServiceDesk Plus allows you to view the list of all your requests. You can also apply various filters to this list and view only a specific group of requests. To view the whole list of requests posted by you, click the **Request** tab in the header pane. This lists all the open requests that you have submitted. You can set the number of requests that you would like to view in a single page

1. In the **Requests** list page, click the drop-down box available as shown in the figure below:



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

There are more filters which can be used as explained below,

- **My Open Requests**
This is the default status on opening the request list view page. All your open requests will be listed under this option.
- **My Requests On hold**
All your assigned requests that are kept on hold will be listed under this option.
- **My Pending Requests**
All your assigned unfinished requests are listed under this option.
- **My Completed Requests**
All your assigned requests that are closed will be listed under this option.
- **My Closed Requests**
All your requests with the status as closed will be listed under this option.
- **All My Requests**
All your requests irrespective of the status will be listed under this option.

Customizing Request List View

ManageEngine ServiceDesk Plus allows you to customize the request list view to include columns of your choice.

To customize the list view

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. Click the **Requests** tab in the header pane.
3. Click the column edit icon  available at the corner of the request list headers. This opens the available columns that can be displayed in the list view. All those that are visible currently, will have the check box beside them selected.



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

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

Sorting Requests by Column

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

Searching Requests

ManageEngine ServiceDesk Plus gives you an option to search for requests using a keyword search. All requests that match the keyword that you have provided in the search will be displayed.

You can also do a column-wise search of the requests. To perform a column-wise search

1. Click the search icon  at the end of the request list view headers. This opens the search field just below every column that is visible in the list view.
2. Enter the search key in field under the column of your choice.
3. Click **Go**. The search results matching the search string(s) are displayed.



Note: The search would return the results for any of the text fields of the request. You will not be able to search for a request based on any of the date fields of the request.

My Details

When creating your login details in the ServiceDesk Plus application, your profile would have some default information. In the **My Details** section of the Self-Service Portal of ServiceDesk Plus, you are allowed to modify the information relating to your profile, including the password. This helps you maintain your profile updated with the latest changes. It also gives you the freedom to edit your profile at your will provided the option is enabled by the administrator under Self-Service Portal Settings in the Admin tab .

Editing My Details

You can edit your details through the Self-Service Portal and need not depend on your IT help desk team to do the same for you. It enables you to modify your own profile whenever you want and saves considerable time.

To edit your profile,

1. Log in to the ServiceDesk Plus application using your **user name** and **password** to access the Self-Service Portal.
2. Click the **My Details** tab on the header pane. The next page displays your user profile as created/edited last time in an editable form.
3. All the fields in this form are editable. Your **name** is a mandatory fields in the form. You can choose to leave the other fields blank. The information that you can edit are your name, employee ID, e-mail, phone, mobile, department name, and job title.
4. To change your department name, you need to select from the list of departments that are available in the drop-down list provided against the **Department** field.
5. When you are done with the modifications, click **Update Details**.



Note : You can edit your details only if the option is enabled in Self Service Portal Settings under the Admin tab. The administrator has the privilege to enable the option.

Personalize

You can localize your personalization such as display language, time zone and so on, as well as change your login password using this option. Apart from the option of changing password from the user management configurations, you can also change your individual password.

1. Log in to the ServiceDesk Plus application using your **user name** and **password** to access the Self Service Portal.
2. Click the **Personalize** link available at the top right corner of the page. This opens Personalize page which has two tabs which are, **Personalize** and **Change Password** as shown below,

Personalize

The personalize tab consists of display language, time zone, data format and time format.

- **Display Language**
Select the language of your choice from the **Choose Language** combo box. The selected language will be you default display language in the application. All the data will be displayed in the language selected by you.
- **Time Zone**
Since the organizations can be situated in various sites, every site has its particular time zone. Select the time zone of the site of your organization from the **Select Time Zone** combo box. The date and time will be set according to the selected time zone.

- **Date/Time Format**

Select the format of the date such as, Tue 16 Sep 2008, from the **Set Date Format** combo box. Similarly you can also set the time format from **Set Time Format** combo box. The selected date and time format will be displayed where ever date/time is considered

For example: While creating a request, the request created on and due by time will be displayed in the selected date and time format corresponding to the selected time zone.

Change Password

1. Click the Change Password tab in the personalize page. This displays the Change Password form.
2. Enter your old password in the **Current Password** field.
3. Enter your new password in the **New Password** field.
4. In the **Confirm New Password**, enter the new password again.
5. Click **Save** button.

Solutions

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

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

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

where,

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

Browsing Solutions by Topic

To browse the available solutions by individual topics,

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click the **Solutions** tab in the header pane. This opens the Solutions list view page.
3. Hover over **Browse by Topics** combo box next to manage topics link. This opens the **Categories** window listing all the topics and their sub topics as shown below,



4. To view all the sub topics, click **>>Show All** link on the right hand side of the page. This lists out the topics and sub topics in a logical manner.
5. On clicking the topic, the solutions of the topic and its corresponding sub topics gets listed. Click the sub topic to view the solutions only in that sub topic.

Search in Solutions

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

To search for solutions,

1. Log in to the ServiceDesk Plus application using your **user name** and **password**.
2. In the Search block on the left hand side of the page, enter the **Solution Keyword** in the provided field.
3. Click **Go** or press the **Enter** key in your keyboard. The search results display all the solutions that match the search string.

Alternatively, from the solutions list view page, enter the search string in the Search Solutions text field. Click **Search Solutions** button. The list of solutions corresponding to the search string gets displayed.

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

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



The screenshot shows the 'Solutions' list view in the ManageEngine ServiceDesk Plus application. At the top, there is a search bar with a magnifying glass icon and a 'Search Solutions' button. Below the search bar, there is a 'Browse by Topics' dropdown menu. The main content area shows a table of solutions with columns: ID, Subject, Topic Name, Views, Created On, Public, and Created By. Below the table, there is a search field for each column, and a 'Go' button to execute the search.

ID	Subject	Topic Name	Views	Created On	Public	Created By
1	To move data from on ...	Settings	2	Mar 2, 2007 04:52 AM	Yes	administrator
2	How to generate a Su ...	Troubleshooting	2	Apr 29, 2007 01:45 AM	Yes	administrator

2. Enter the search key in field under the column of your choice. You can enter keywords in more than one column to perform a combined column search.
3. Click **Go**. The search results matching the search string(s) are displayed.

General Features

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

- Tracking your daily tasks
- List of the last ten Recent Items viewed in the application
- View company wide Announcements.

Reminders

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



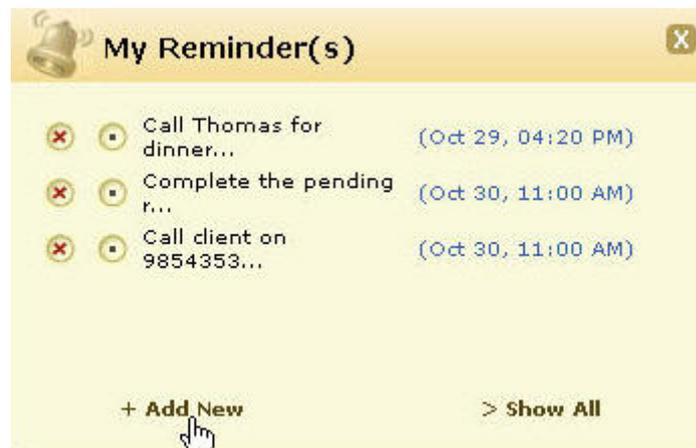
Note: The Reminders option is available under Quick Actions link provided the option is enabled by the administrator under Self Service Portal Settings.

Add Reminders

To add new reminders,

1. Log in to the ServiceDesk Plus application using your user name and password.
2. Click **Quick Actions**  just below the header tabs -> **Add New** under the **Reminders** block. The Reminders form pops up.

Alternatively, you can add a new reminder by clicking **Quick Actions** -> **My Reminder (s)**. The **My Reminder (s)** form pops up as shown below,

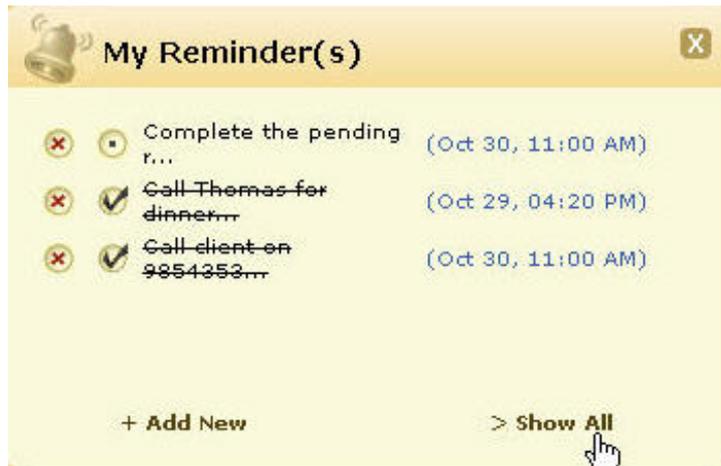


2. Click **+Add New** link at the bottom of the my reminders form. This opens Reminders page.
3. Enter the task summary in the text field provided.
4. Select the **Date & Time** for the reminder. The date field is set to the today's date and the time is set by default as 11:00 AM. Change the date and time settings. To change the **date**, click the calendar icon  beside the date field and choose the date of your choice. From the time combo box, choose the time at which the task is scheduled. The values in the combo box are available in a gap of 5 min time interval.
5. Click **Add**. The new reminder is added and is listed along with the already existing reminders in the ascending order based on date and time.

Changing Status

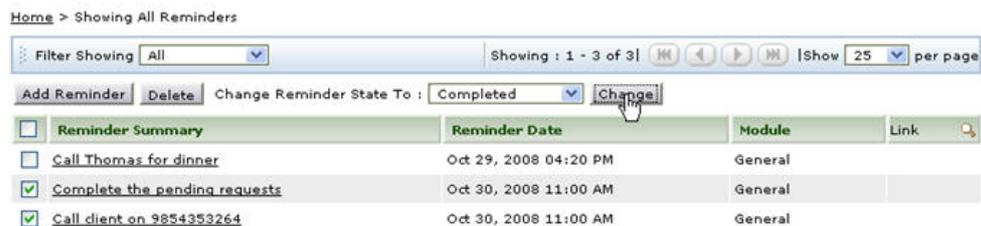
When you have completed a reminder, you can just strike the reminder to indicate that it is completed by selecting the radio button beside the reminder.

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



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

1. Click **Show all** at the bottom right of the **My Reminders** pop up window. The **All Reminders** window opens as shown below,



2. Select the check boxes beside the **Reminder Summary** for which you wish to change the state.
3. Select the state from the **Change Reminder State To** combo box, select the reminder state to **Completed**.
4. Click **Change** button to change the status of the task. To indicate the change the task would be striked of.

Deleting Reminders

The reminders can be deleted by,

1. From the **My Reminders** form, click **Delete this reminder** radio button  available beside the status radio button. The reminder gets deleted from the list.
2. Alternatively, from **All Reminders** window, enable the check box beside the Reminder summary to be deleted. Click **Delete**. A pop up window confirming the delete operation appears. Click **Ok** to proceed. The reminder gets deleted from the list.

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

Recent Items

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

Announcements

All the company wide announcements that are published by your help desk administrator will be displayed in the announcements block in your login home page.



The recent announcements will be displayed in the block. To view all the announcements click **Show All** button on the right hand side of the announcement block. This will display the list of all announcements added till date.

To view an announcement, click the **Announcement Title** to open the complete announcement details in a pop-up. If there are more than one announcements, then you will notice a **Previous** and **Next** button in the pop-up. Using this you can navigate through the announcements list and view all the announcements without closing the pop-up window.