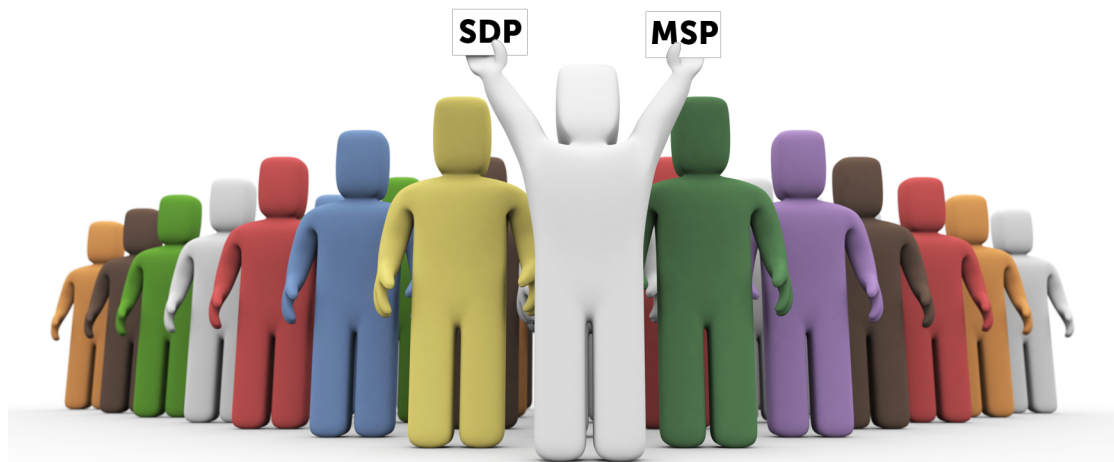


ManageEngine®  
**ServiceDesk Plus MSP**



# User Guide

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## Introduction

ManageEngine ServiceDesk Plus - MSP is a comprehensive help desk and asset management software that provides Service Provider an integrated console to monitor and maintain the assets and IT requests generated from their Account's users of the IT resources. 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. Without this, an organization could certainly face losses due to inefficiencies.

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

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

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

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

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

## Home Page

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

1. Announcements
2. My Approvals
3. My Summary
4. Popular Services
5. Common Incidents
6. Popular Solutions
7. Personalize & Change Password
8. New Incident drop down
9. Service Catalog drop down
10. Quick Actions drop down

The screenshot displays the ManageEngine ServiceDesk Plus MSP Home Page for a user named 'adam'. The page features a navigation bar with tabs: Home, Service Catalog, Requests, Solutions, and My Details. Below the navigation bar, there are three dropdown menus: New Incident, Service Catalog, and Quick Actions. The date and time are shown as 25 April 2013, 17:28:50.

The main content area is divided into several sections:

- Announcements:** A yellow banner at the top containing two announcements:
  - Nortel Network will be down due to maintenance from 12pm till 2pm today.
  - Webinar conducted on help desk - Webinar conducted on help desk
- My Approvals:** A section with a green checkmark icon, containing a table of requests for approval:
 

Request Approvals	
Please add the specified member to the existing email listing by vijay	<a href="#">Take Action</a>
Mail Fetching issue by John	<a href="#">Take Action</a>
- My Summary:** A section with a blue header, containing a table of request statistics:
 

Pending Requests	6
Requests On Hold	6
Requests Overdue	0
Completed Requests	7
All Requests	13
- Popular Services:** A section with a blue header, containing a list of popular services:
  - [Request a CRM account](#): This service template is used to request CRM account creation
  - [Request a BlackBerry](#): This service template is used to request a BlackBerry
  - [Request a DID extension](#): This service template is used to request a DID extension for them
  - [Request a file download from an external website](#): This service template is used to request a file download from external[...]
  - [Request a file upload](#): This service template is used to request a file upload to an external [...]
- Common Incidents:** A section with a blue header, containing a list of common incidents:
  - [Mail fetching](#): This template is used to create request when there is problem in mail [...]
  - [Printer problem](#): This template is used to create request when there is problem in print[...]
  - [Unable to browse](#): This template is used to create request when user is not able to brows[...]
  - [Unable to restore data](#): This template is used to create request when user is not able to resto[...]
- Popular Solutions:** A section with a blue header, containing a search bar and a list of popular solutions:
  - [How to generate a Support file ?](#): Please follow the steps mentioned below for support file generation: < [...]
  - [To move data from one installation from another.](#): You can move the data from the existing server to new server. Ple [...]
  - [Modify Login screens and Logout screens](#): Find below the procedure to meet with your need: 1. Save the page ser [...]

## Announcements





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

## My Approvals

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

## My Summary

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

-  **Pending:** Number of requests raised by the logged in requester that is yet to be resolved.
-  **Requests On Hold:** Number of requests raised by the logged in requester that are in On Hold status.
-  **Requests Overdue:** Number of requests raised by the logged in requester that are due for that day.
-  **Completed Requests:** Number of requests raised by the logged in requester that are resolved.
- **All Requests:** The total number of requests raised by the logged in requester.

Clicking any of these links takes you to the Request List view of the selected option. Say, you have selected 'Completed Requests' link, the request list view opens is filtered to show the completed requests.

## Popular Services

The services that are most frequently used by the logged in requester are displayed under Popular Services. It's an easy access to create service requests instantly. Clicking on **More** link takes you to the Service Catalog module displaying the service categories made available to you. From the Service Catalog page, you can create a service request using the templates.

## Common Incidents

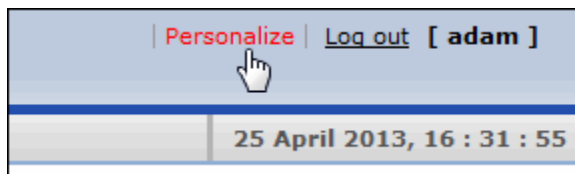
The most frequently used request templates are listed under Common Incidents. It's an easy access to create incident requests instantly. Clicking on **New Incident** link takes you to the new request form.

## Popular Solutions

The most frequently viewed solutions are listed under Popular Solutions block. You can also search for solutions by typing the keywords in the search field. Clicking on More link takes you to the Solutions module displaying the solutions made available to you.

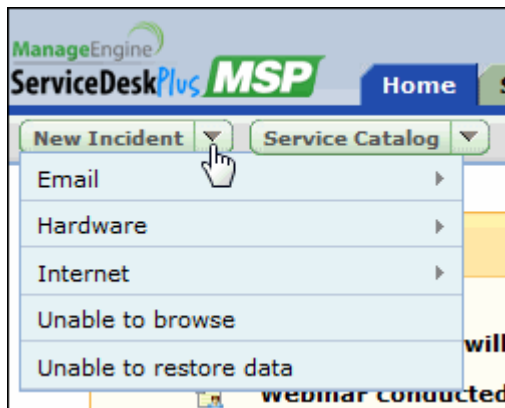
## Personalize & Change Password

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



## New Incident drop down

The request templates made available to you are listed in the New Request drop down. Click on **New Request** link to access the New Request form.



## Service Catalog drop down

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

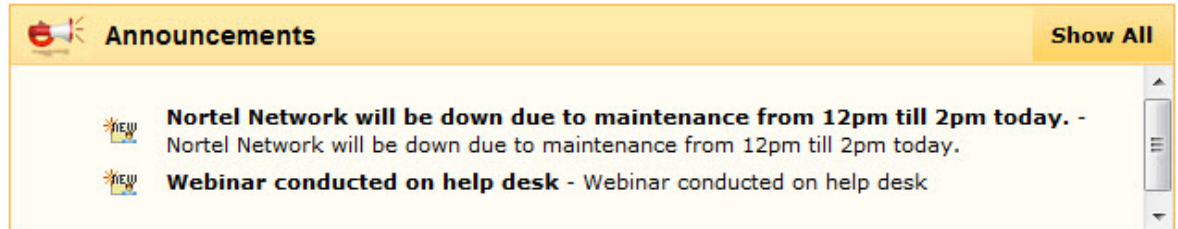
## Quick Actions drop down

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






## Announcements

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



### Representation of Icons:

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

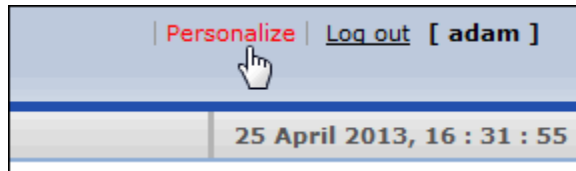
Click the **Announcement Title** to view the announcement details. The details of the announcement open in a pop-up window. If there are more than one announcement, a **Previous** and **Next** button appears in the pop-up. Using these buttons, you can navigate through the announcements list and view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

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

## Personalize & Change Password

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

1. Click **Personalize** link beside the **Help** link.



2. The Personalize window pops up displaying the **Personalize** tab and **Change Password** tab. By default, the Personalize tab is displayed.

- **Display Language**  
Select the language to be displayed in the application from **Choose Language** drop-down

menu. For example, French, English and so on. All the data in the application will be displayed in the selected language.

- **Time Zone**

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

- **Date Format and Time Format**

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

## **Change Password**

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

## Reminders

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

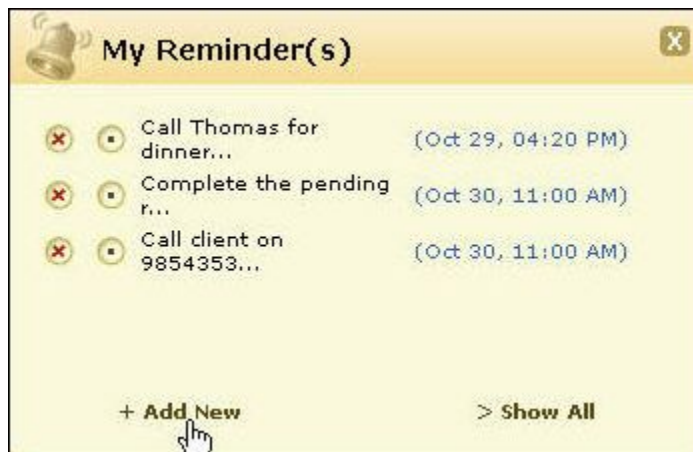
**NOTE:** The **Quick Actions drop-down menu** is available if the administrator has enabled the option under Self Service Portal Settings.

### Add Reminders


To add new reminders to your reminder list,

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

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



Click **+Add New** link. The Reminders form opens in a pop up window.

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

## Changing Status

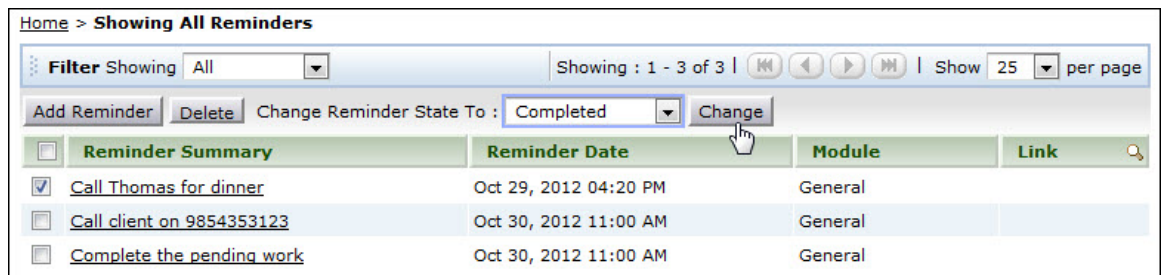
When you have completed a reminder, you can just strike the reminder to indicate that it is completed by selecting the radio button beside the reminder.

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



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


1. Click **Show all** at the bottom right of the **My Reminders** pop up. The **All Reminders List** view is displayed.



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

## Deleting Reminders

The reminders can be deleted by,

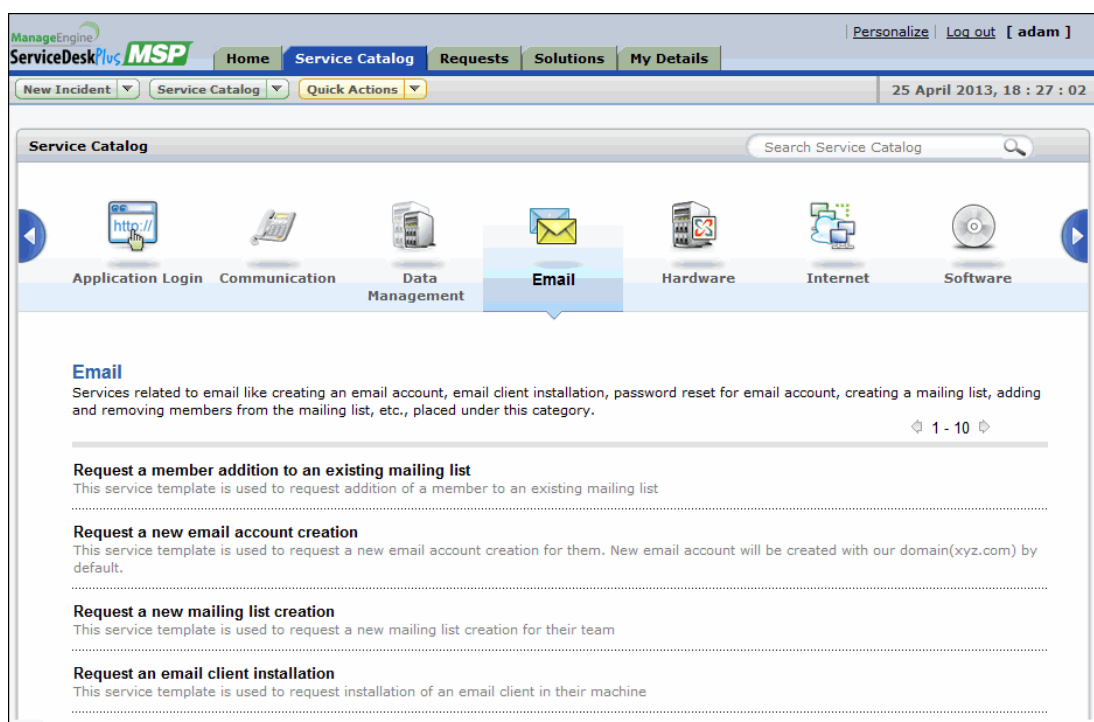
1. From the **My Reminders** pop up, click **Delete this reminder** radio button  beside the reminder you want to delete. The reminder is deleted from the list.
2. Alternatively, from **All Reminders** List view, enable the check box beside the Reminder summary to be deleted. Click **Delete** button.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

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

## Service Catalog

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

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



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

### Searching for Service(s)

A search can be conducted to choose a service from the wide range of service items displayed in the application. Enter a key word in the search field say, "software" and click enter. The desired search results are obtained.



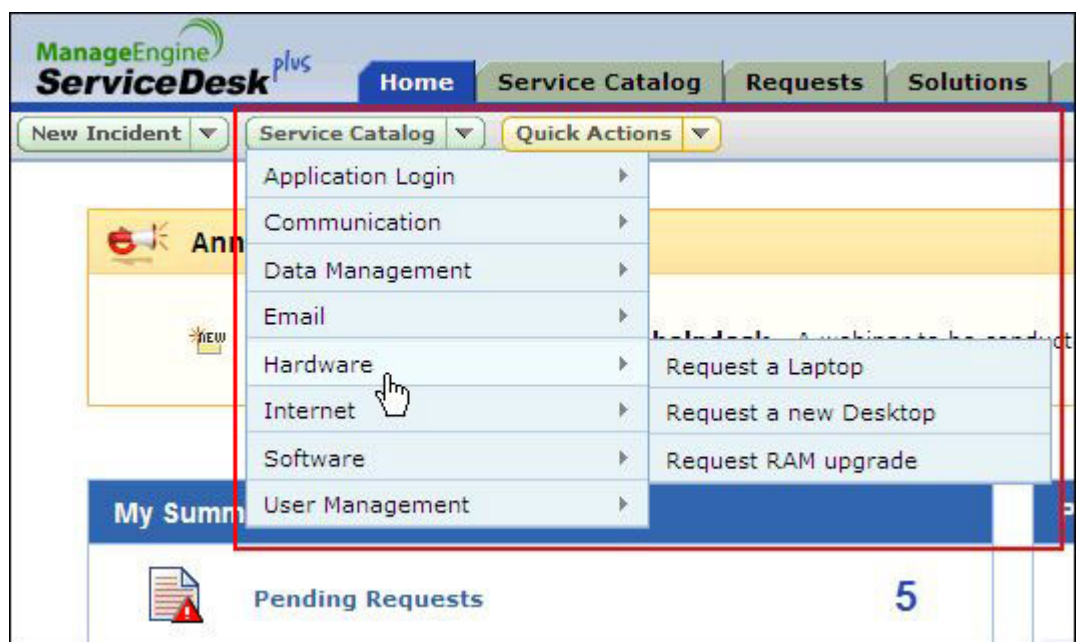
## Creating a Service Request

Creating a new service request is as simple as creating a new incident request from the available templates. Browse through the Template List and select a service that is relevant to your needs. Service requests can be raised from the application in two ways,

- **Service Catalog drop down**
- **Service Catalog tab**

### Service Catalog drop down

Similar to the New Incident drop down, a **Service Catalog drop down** listing the available service categories in the catalog appears. Browse through the service categories and select a service.



### Service Catalog


Alternatively, you can select a service from the Service Catalog tab. All you need to do is select the Service Category and select the service item link from the list. You can also conduct a search for desired services.


Selecting a service from the list, takes you to the **New Service Request** form. The form is customized for end-user specific by the Service Manager.

In the service request form,

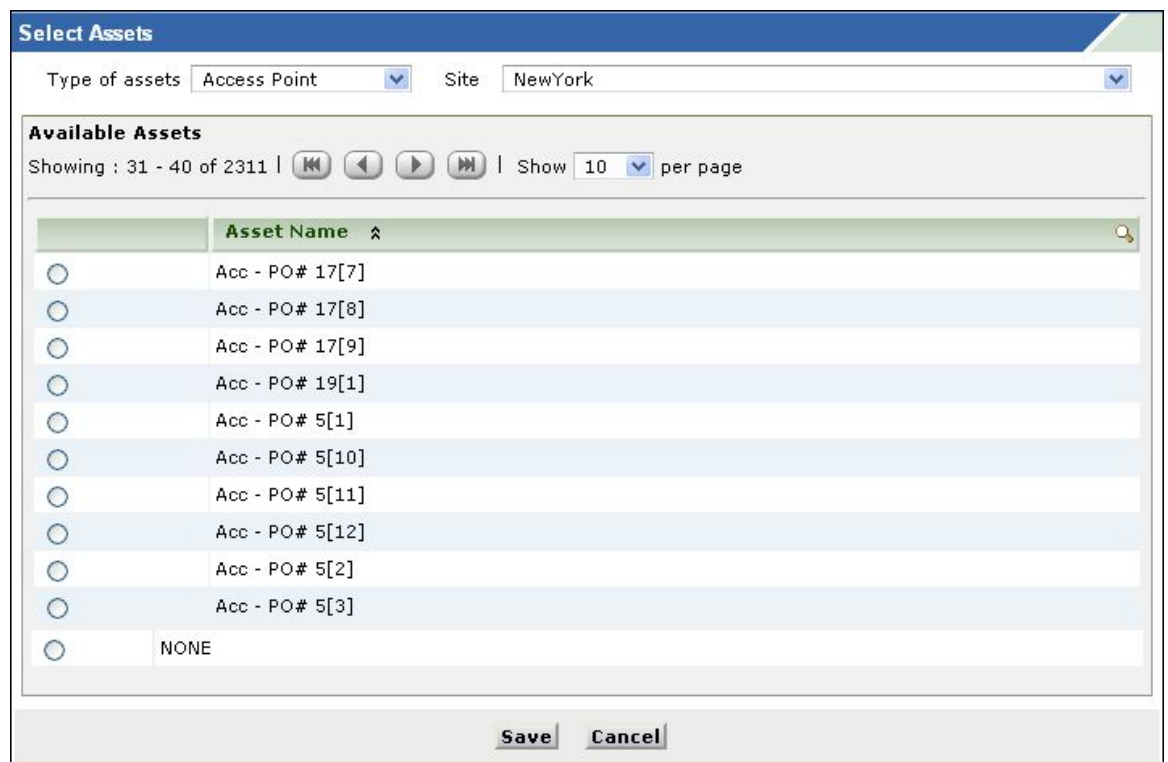
1. The logged in Requester Details such as **Name**, **Contact Number**, **Job Title** and **Description** are pre-filled automatically. These fields are non-editable.



- The assets associated to the requester are populated in the **Asset** drop down. Select the **Asset** from the drop down. If you want to select an asset that is not associated to you, select the icon .

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

In **Select Assets** pop-up window, you can filter the assets by selecting the **Type of assets** such as, access point, routers, workstation and so on, from the drop-down. Selecting All Assets from the drop-down menu lists all the assets available in the application, irrespective of the asset type. You can further filter the assets according to sites using the Site drop-down. Selecting a site lists the assets from that particular site. Say, for instance, if the site selected is "New York" and the asset type is "Access Point", then all the access points associated to the site New York are listed.



	Asset Name
<input type="radio"/>	Acc - PO# 17[7]
<input type="radio"/>	Acc - PO# 17[8]
<input type="radio"/>	Acc - PO# 17[9]
<input type="radio"/>	Acc - PO# 19[1]
<input type="radio"/>	Acc - PO# 5[1]
<input type="radio"/>	Acc - PO# 5[10]
<input type="radio"/>	Acc - PO# 5[11]
<input type="radio"/>	Acc - PO# 5[12]
<input type="radio"/>	Acc - PO# 5[2]
<input type="radio"/>	Acc - PO# 5[3]
<input type="radio"/>	NONE

- The **Subject** and **Description** for the service request is pre-filled by the Service Manager.
- By default, if the location of the requester is configured in the application, then the same is populated in the **Site** field.
- Enter relevant values in remaining fields. If the fields are pre-filled with values, you can edit the same. Certain fields might not be editable.
- If you are requesting for any resources, select the resources from the available list from the **Resource** Info block.
- If required, you can **Attach Files** to the service request. To attach a file,

1. Click **Attach File** button and browse through the files.
2. Click **Open** in the File Upload pop-up.
3. Click **Attach File** button. The file is attached to the service request with the file name and size. A delete icon is present to delete the file. Similarly, you can add another file but please note that the maximum size of the attachment is 10MB.
8. Click **Add New Request** to raise the request. Click **Reset** to reset the entered values. Click **Cancel** to take you to the request list view page.

## Requests

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

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

## Request List View

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

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

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

ID	Subject	Requester Name	Assigned To	DueBy	Status	Created Date
119	<a href="#">Change of laptop</a>	Adam smith	Heather Graham	May 6, 2013 02:45 PM	Open	Apr 26, 2013 12:34 PM
116	<a href="#">Install Adobe Photoshop</a>	Adam smith	Jeniffer Doe	May 9, 2013 02:46 PM	Open	Apr 26, 2013 12:32 PM
115	<a href="#">Install MS Office 2007</a>	Adam smith	John Roberts	Apr 11, 2013 12:58 PM	Open	Apr 9, 2013 12:31 PM
120	<a href="#">Please clean up the specified machine</a>	Adam smith	Howard Stern	Apr 25, 2013 12:58 PM	Open	Apr 24, 2013 12:36 PM
96	<a href="#">Unable to access the portal</a>	Adam smith	Shawn Adams	Apr 29, 2013 02:48 PM	Onhold	Apr 25, 2013 05:08 PM
97	<a href="#">Unable to fetch mails</a>	Adam smith	Shawn Adams	Apr 30, 2013 02:48 PM	Closed	Apr 25, 2013 05:08 PM
117	<a href="#">Unable to restore data</a>	Adam smith	Jeniffer Doe	Apr 26, 2013 12:59 PM	Open	Apr 17, 2013 12:32 PM
118	<a href="#">Voip connection request</a>	Adam smith	John Roberts	May 7, 2013 02:45 PM	Open	Apr 26, 2013 12:33 PM

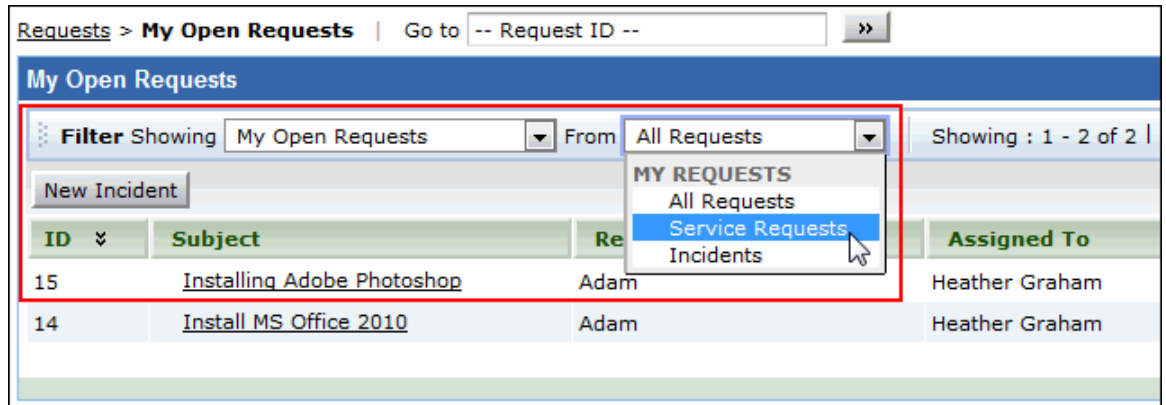
### Representation of Icons in the list view:

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

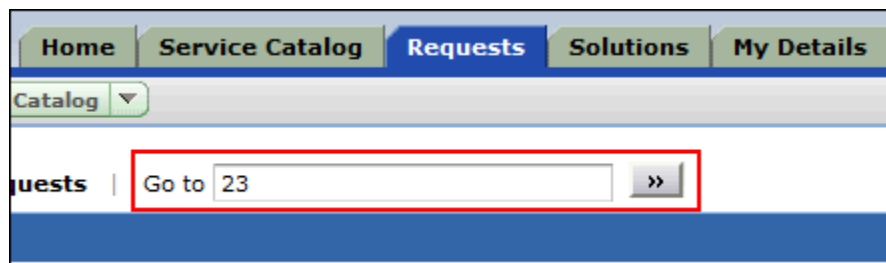
This page includes various useful functionalities such as,

1. **Filter drop-down menu:** The Filter drop-down menu consists of default filter list and options to restrict the list view to display **Service Requests**, **Incident Requests** or **All Requests** (both Service and Incident Requests). Based on your access privilege, you can view only your

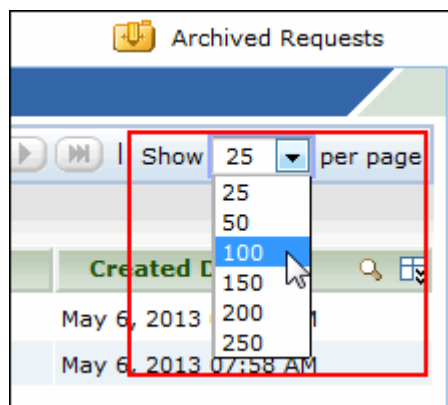
requests, request raised in your department, requests raised in your site and request raised in your account. This access privilege is provided by the administrator.



2. **Viewing Archive Requests:** View all your requests in the Archive state. The data archiving is schedule by the administrator at regular intervals to move the closed/completed requests into an inactive (archive state). This is to prevent accumulation of millions of active requests in the application thereby increasing the helpdesk performance.
3. **Searching Requests based on Request ID:** View the details of a request instantly by entering the Request ID and click **Go** button.



4. **Column-wise Search:** Perform column-wise search for specific Groups, Requesters, Departments, Sites and so on.
5. **New Incident:** Create new incident requests instantly using the **New Incident** button.
6. **Set the number of requests per page and navigation buttons:** You can set the number of requests to be displayed in the request list view page.



7. **Organizing the Request Order:** Sort the order of the requests. Click the column name link to sort requests in ascending or descending order.
8. **Viewing Archive Requests:** View all your requests in the Archive state. The data archiving is schedule by the administrator at regular intervals to move the closed/completed requests into an inactive (archive state). This is to prevent accumulation of millions of active requests in the application thereby increasing the helpdesk performance.

## Create an Incident

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

To create a new incident using the web-based form

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

### Requester Details

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

### Classifying Category

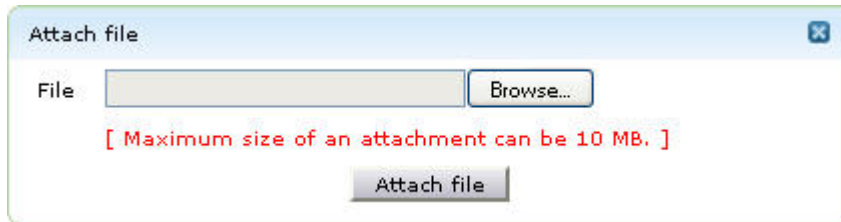
The **Category** drop-down box, lists the categories under which an incident can be classified. Select the relevant category to which your incident request can be grouped. Select the relevant **Sub-Category** from the combo box. Also select the relevant **Item** from the combo box.

### Describe Incident Request

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

## Add Attachments to the Request

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



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

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

## Additional Fields

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

## Modes of Creating an Incident Request

There are different modes of creating an incident request. One of them is using the web-based form. To use the Web-based form, you must have login access to the ServiceDesk Plus - MSP 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 - MSP 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 Incident form available in the Request module.



## View Request Details

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

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

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

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

## Reopen/Close Request

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

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

### Close a Request

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

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

### Reopen a Request

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

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

## Print the Request

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

To print a request,

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

## Add a Note

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

To add a note to a request,

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

Request ID : 61

☐ E-mail the technician for notes addition

**Add Note**

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

## View Request Resolution

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

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

## View Request Approvals

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

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

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

To access the Approvals tab,

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

## View Request History

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

To view the request history,

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

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

## View Requester Details

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

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

To view Requester details,

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

Requester details - Adam smith	
 <b>Adam smith</b>	Employee ID :0280
Department Name	<b>Biomedical Instrumentation</b>
E-mail	<b>adam@univ.com</b>
Phone	<b>647-748-3739</b>
Mobile	<b>647-348-2239</b>
Company	<b>University</b>
Description	<b>No Description</b>
Site Name	<b>London</b>

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



## View All Replies

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

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

## View Survey Results

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

To view the survey results,

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

### NOTE:

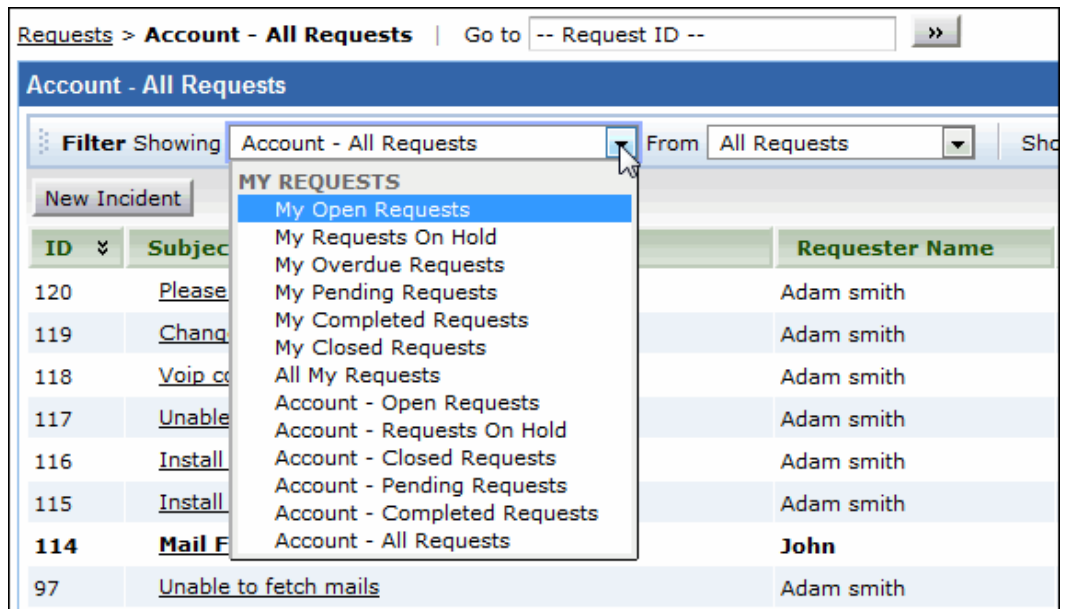
1. The View Survey Results link would appear only if you had taken the survey.
2. Once the survey is submitted, the response cannot be changed.

## View Requests based on Filters

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

To view requests based on filters,

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



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


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

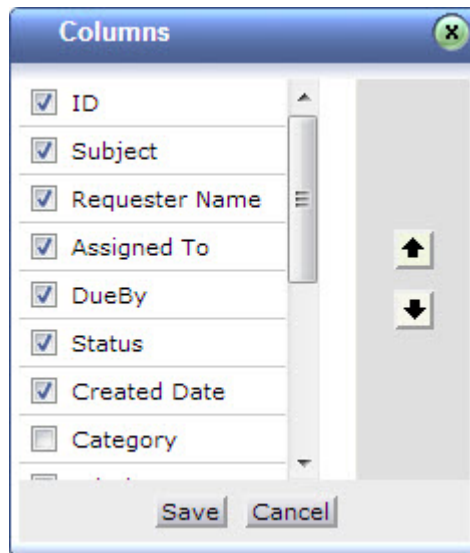
- **Account - Open Requests**  
All the open requests raised from your account are listed under this option.
- **Account - Requests On Hold**  
All the assigned requests raised from your account that are on hold is listed under this option.
- **Account - Closed Requests**  
All the requests raised from your account that are closed is listed under this option.
- **Account - Pending Requests**  
All the requests raised from your account that are completed is listed under this option.
- **Account - Completed Requests**  
All the requests raised from your account that are closed is listed under this option.
- **Account - All Requests**  
All requests raised from your account is listed under this option.

## Customize Request List view

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

To customize the columns in the list view,

1. Click the **Requests** tab in the header pane.
2. Click the column edit icon  available at the corner of the request list headers. This opens the available columns that can be displayed in the list view. All those that are visible currently, will have the check box beside them selected.



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

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


## 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.

## Search for a Request

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

To perform a column-wise search

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

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



## Mobile Client

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

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

### Features

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

### Limitations

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

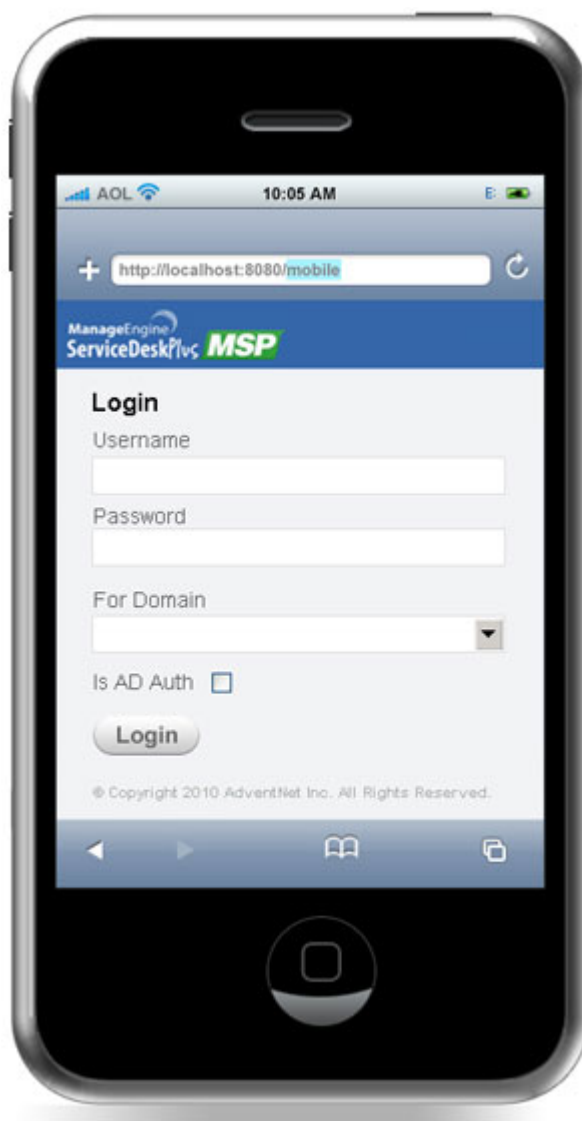
## Getting Started

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

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

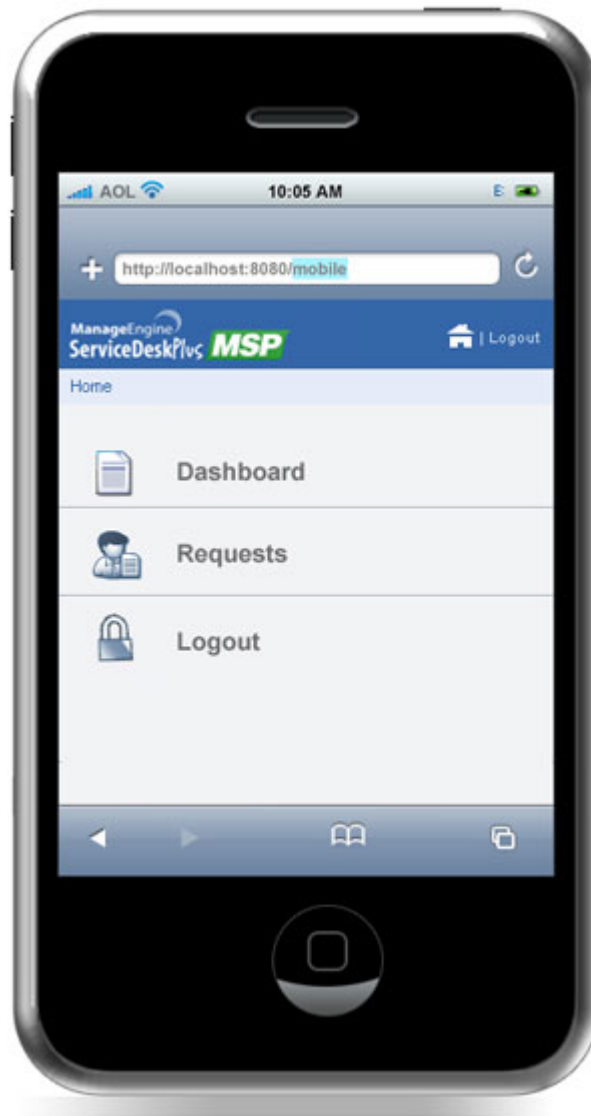
**NOTE:** ServiceDesk Plus - MSP Mobile Client does not support Single Sign-On (SSO)








Click **Login** button.

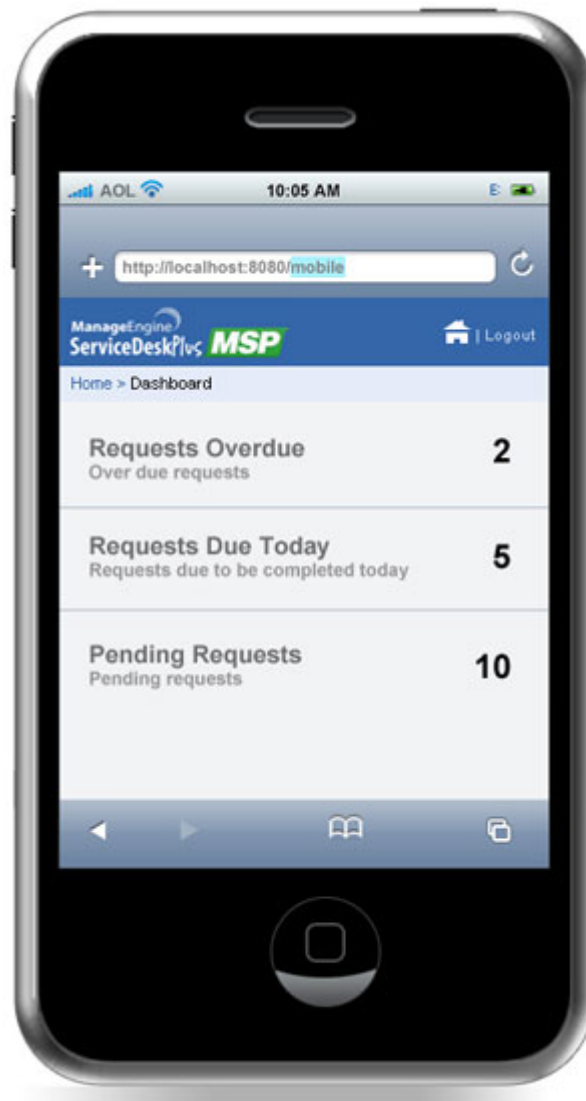
On logging into the application from your mobile device, the home page displays the **Dashboard**, **Requests** and **Log out** options.



-  **Dashboard:** Displays the number of **Overdue Requests**, **Pending Requests** and **All Requests** raised by the logged in requester.
-  **Requests:** Displays the request list view with options to select, **My Pending requests**, **All Pending Requests** and **All Requests** raised by the logged in requester.
-  **Log out:** To log out from the mobile client.

## Dashboard

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



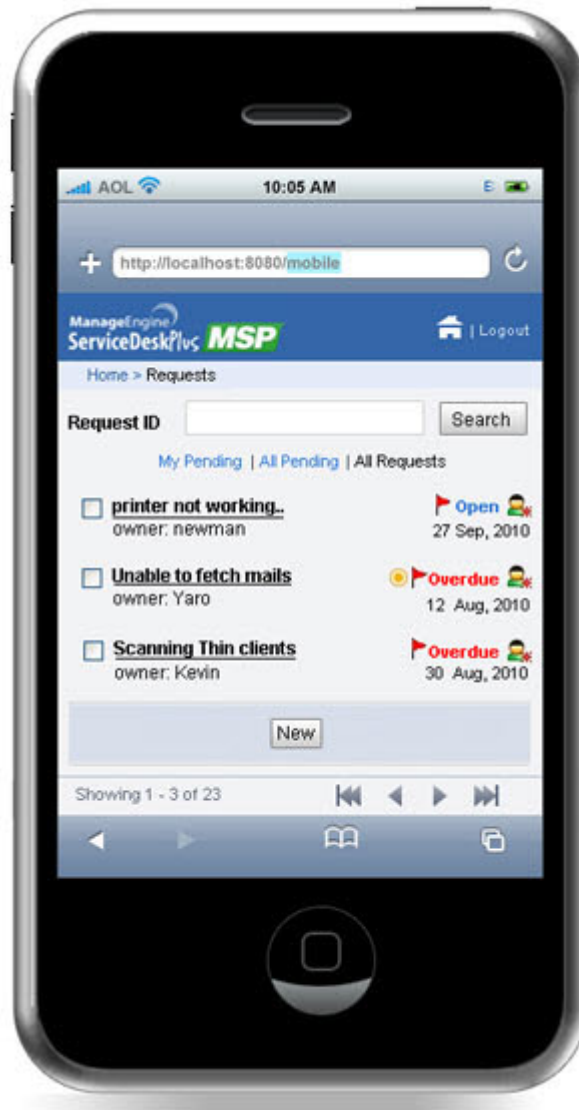
To revert back to the Home page click the **Home** icon  on the top right corner of the page.

## Requests



Selecting Requests from the dashboard takes you to 'My Pending' requests by default. The requests view options comprises of My Pending Requests, All Pending Requests and All Requests.




### Request List View

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




#### Representation of icons from the Request List View

-  - Indicates that the First Response Time is overdue
-  - Indicates that the request is overdue

-  - Indicates that the first response and resolution time are overdue
-  - Indicates technician is assigned to the request
-  - Indicates unassigned requests i.e., technician is not assigned to the request

### Operations performed from the Request List View

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

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

### Creating a New Request

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



In the New Request form, enter the following details,

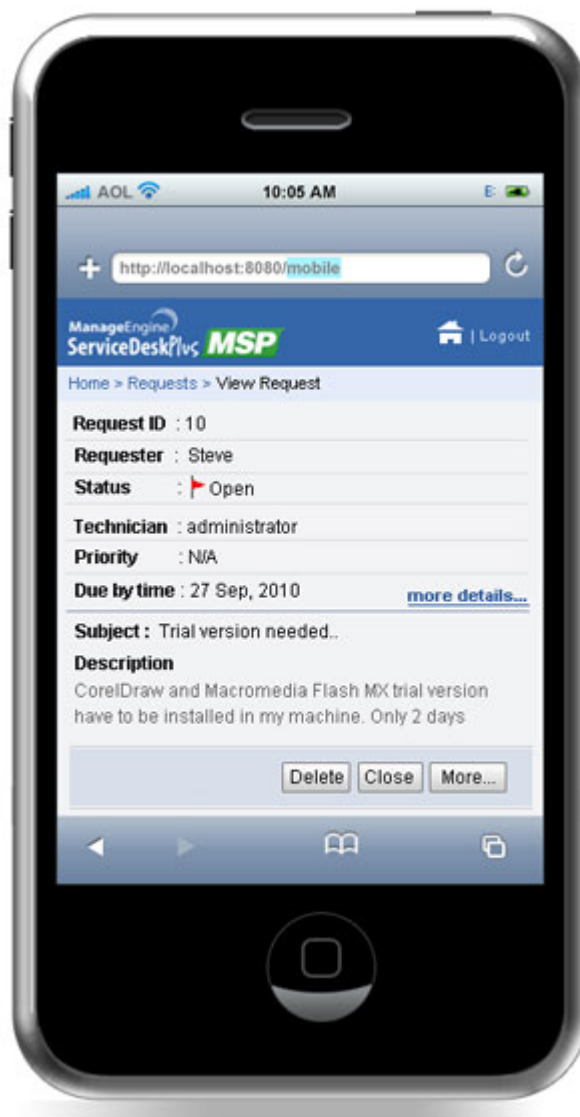
- **Requester Name:** By default, the name of the logged in requester is populated in this field.
- **Request Title:** Enter a brief summary of the request.
- **Description:** Enter a detailed description about the issue.

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

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

## Viewing Request Details

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



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

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

## Solutions

ManageEngine ServiceDesk Plus - MSP 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 - MSP is installed and

**<port number>** is the port where the application is running.

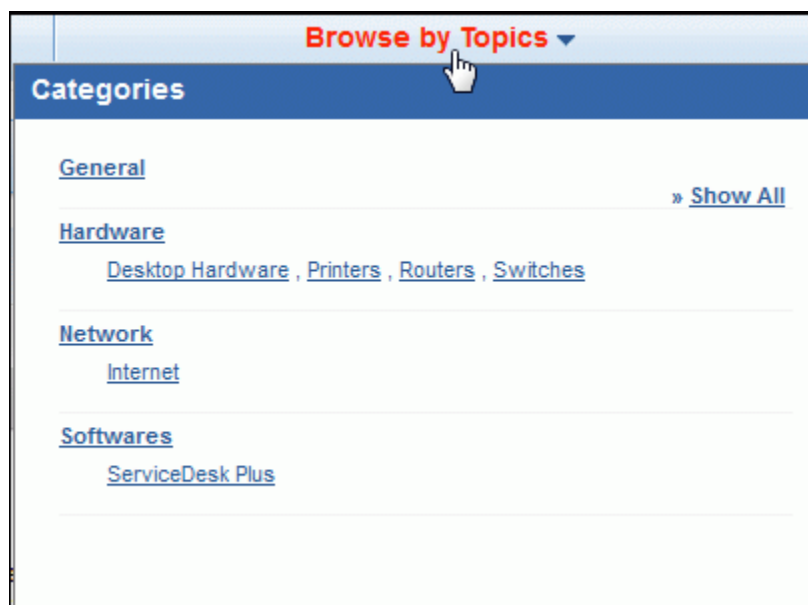


## Browse Solutions by Topic

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

To browse for solutions under a topic,

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



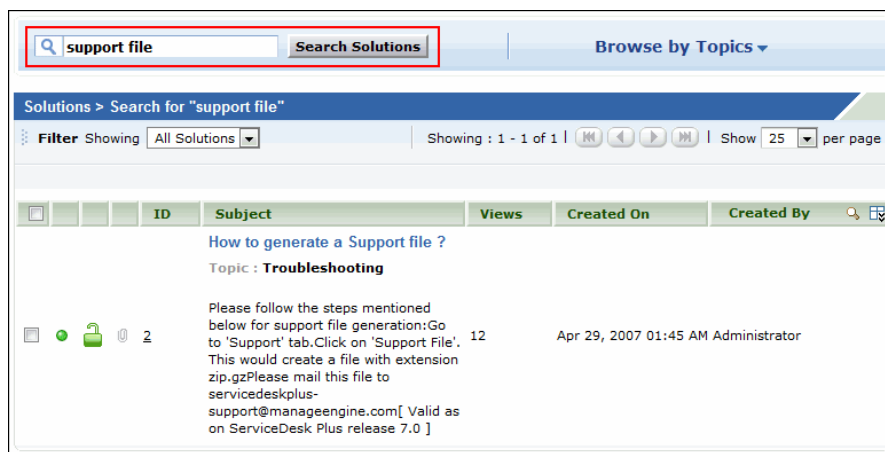
3. To view all the sub topics, click **>>Show All** link. This lists out the topics and sub topics in a logical manner.
4. Click a topic or sub topic to view the solutions under it.

## Search for a Solution

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

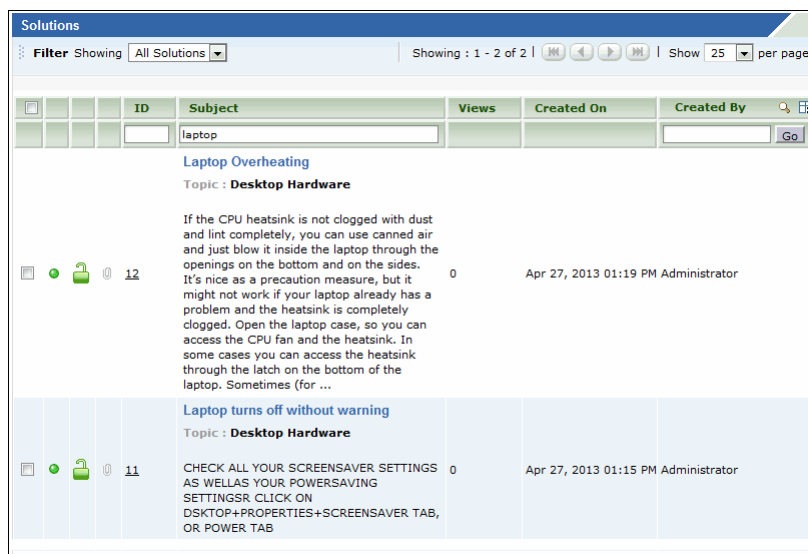
To perform **keyword search**,

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



To perform **column-wise search**,

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



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

## My Details

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

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

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

## Edit My Details

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

To edit your profile,

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

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