Symantec™ ServiceDesk Portal User's Guide

Version 7.0 MR1

Symantec™ ServiceDesk Solution Software User's Guide

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Contents

Introducing the ServiceDesk portal

This chapter includes the following topics:

About the ServiceDesk portal

The ServiceDesk portal is a Web-based interface that provides access to the ServiceDesk application software. The users of ServiceDesk access the portal from their Web browsers and use it to run the workflow processes and perform other ServiceDesk activities.

Examples of the tasks that users can perform in the ServiceDesk portal are as follows:

- Administrators can configure settings for the appearance, operation, and management of the portal.
- Users can create incidents and view knowledge sources such as the knowledge base.
- Process workers can work on incidents, create and work on tickets for other processes, contribute articles, and participate in discussions.

When you log on to ServiceDesk, the permissions that you have been granted determine the elements of the portal that are available to you. If you cannot access a particular portal page or other feature, you probably do not have the appropriate permissions.

See "Logging on to the ServiceDesk portal" on page 9.

Table 1-1 Screen elements of the ServiceDesk portal

Element	Description
ServiceDesk portal	The browser window that appears when you double-click the **Altiris Process Manager** shortcut.
Site Actions drop-down list	A drop-down list that can appear at the top of the ServiceDesk portal window. It appears only when you have permission to edit the current ServiceDesk portal page.
Link	The clickable text that appears at the upper right and lower left of the ServiceDesk portal window. Examples of links are **Help** and **Logout**.
Tab bar	The horizontal row of tabs that appears near the top of the ServiceDesk portal window. The pages that appear on the tab bar are root pages.
Tab	A clickable segment of the tab bar. Clicking a tab opens a page or displays one or more menu commands.
Menu bar	The horizontal row of menu commands that appears beneath the tab bar. The contents of the menu bar depend on the tab that you click. Some tabs do not have a menu because they perform a single action. The pages that appear on the menu bar are subpages. Whenever you log on to the ServiceDesk portal, the portal opens to a specific page. Initially, your permissions determine which page opens. However, you can set a different page to open when you log on. See "Logging on to the ServiceDesk portal" on page 9.
Menu command	A clickable segment of the menu bar. Clicking a menu command opens a page or displays one or more menu subcommands.

Table 1-1 Screen elements of the ServiceDesk portal *(continued)*

Element	Description
Page or portal page	The entire area that appears beneath the menu bar when you click a tab or a menu command. Most of the work in ServiceDesk is performed in a portal page or in a page that is accessed from a portal page. Portal pages can be customized for the entire organization or for users, groups, permissions, or organizational units. Administrators have permission to customize portal pages and to grant customization permissions to other ServiceDesk users. See "About customizing the contents of ServiceDesk portal pages" on page 19.
Section or Web part	The segments that appear on a ServiceDesk portal page in the form of Web parts that let you perform actions or enter data. You can customize a portal page by adding, editing, or deleting one or more Web parts. See "Adding a Web part to a ServiceDesk portal page" on page 23. See "Editing or deleting a Web part on a ServiceDesk portal page" on page 24.

Logging on to the ServiceDesk portal

The ServiceDesk portal is a Web-based interface that lets users submit incidents and lets ServiceDesk workers perform their service-related work.

See "About the ServiceDesk portal" on page 7.

During the setup of the ServiceDesk portal, each user is assigned a user name and initial password. We recommend that you change your password after you log on to the portal for the first time.

See "Changing your password" on page 10.

The permissions that you have been granted control all aspects of your use of the ServiceDesk portal. They determine which parts of the ServiceDesk portal you can access and what you can do in each part.

If you cannot see or work in a particular feature, you probably do not have the appropriate permissions. Your ServiceDesk administrator can help you with any permissions issues.

When you log on to the ServiceDesk portal, the portal opens to a specific page. Initially, your permissions determine which page opens. However, you can set a different page to open when you log on

See "Setting your opening portal page" on page 20.

To log on to the ServiceDesk portal

1. Open your Web browser and in the **Address** bar, type the URL that has been provided for your ServiceDesk portal, as in the following example:

   http://*ServiceDesk/ProcessManager*

2. On the logon page, type your **Email Address or Username** and **Password**.
3. (Optional) Check **Remember Me**.

   This option creates a cookie on your local computer, which automatically logs you on to ServiceDesk. The cookie expires in one year.

4. Click **Login**.

Changing your password

ServiceDesk users who have permission to change their passwords can do so in the ServiceDesk portal.

Note: If your organization uses Active Directory to authenticate the users who log on to ServiceDesk, those users cannot change their passwords in the ServiceDesk portal.

To change your password

1. In the upper right of the ServiceDesk portal, click **Account**.
2. On the account page, at the far right of the **User Information** title bar, click the **Actions** symbol (orange lightning), and then click **Change Password**.
3. In the **Change Password** dialog box, enter your current password and your new password, and then confirm the new password.
4. Click **Change Password**.

Default ServiceDesk portal pages

See "About the ServiceDesk portal" on page 7.

The ServiceDesk portal contains a series of default portal pages. The role-based permissions that you have been granted determine the portal pages and actions that are available to you. If you cannot access a particular portal page or feature, you probably do not have the appropriate permissions.

You can perform all of the ServiceDesk functions on the default pages, which are ready to use. However, you might want to customize the pages or add new pages to meet your organization's specific requirements.

See "About customizing the contents of ServiceDesk portal pages" on page 19.

If any page was customized, its appearance and contents might differ from the default page. Your ServiceDesk portal might contain pages other than or in addition to the default pages.

Table 1-2 Default ServiceDesk portal pages

Page	Description
Admin pages	Let the administrator configure settings for the ServiceDesk portal. The **Admin** pages are accessed by selecting a menu command from the **Admin** tab in the ServiceDesk portal.
Dashboard	Provides a high-level, graphical view of the number and status of incidents in the organization. Change managers, release managers, and service managers can use this information to spot trends and potential problems in the resolution of incidents. The reports that appear on this page are actionable, which provides more value than a view of the state of the environment. For example, if a Web part contains a report in the form of a graph, you can click the graph to open a report view. You might also be able to drill down to the items in the report. If a Web part lists tasks, you can open a task and work it. You can also add custom Web parts to start processes, take further action, or help you perform other tasks.
Discussions	Lets you start, view, and participate in discussions. See "Discussions page" on page 13.
Documents	Lets you view, download, email, and perform other actions with documents in the document management system. Your permissions determine which documents you can view and what actions you can take with those documents.
FSC (Forward Schedule of Change)	Lets the change manager and release manager plan changes and releases that coordinate with the existing schedule. It also lets users view the scheduled changes that might affect them. See "FSC page" on page 15.
Home	Serves as the primary workspace for viewing the tickets that you submitted and performing other general ServiceDesk activities. See "Home page" on page 13.

Table 1-2 Default ServiceDesk portal pages *(continued)*

Page	Description
Knowledge Base	Lets you view and manage knowledge base items. You can edit existing items and you can add new items outside of the normal knowledge base process. See "Knowledge Base page" on page 15.
My Task List	Lets you view and work on the tasks that are assigned to you. The **My Task List** page is the primary workspace for working on your tasks. See "My Task List page" on page 16.
Reports	Lets you view, create, delete, copy, email, and perform other actions with reports in ServiceDesk.
Submit Request	Lets you submit tickets and perform other self-service actions. For example, a user can submit an incident and a support technician can submit a change request. See "Submit Request page" on page 17.
Technician Dashboard	Provides a high-level, graphical view of the number and status of incidents in the organization. Support technicians can use this information to spot trends and potential problems in the resolution of incidents. The reports that appear on this page are actionable, which provides more value than a view of the state of the environment. For example, if a Web part contains a report in the form of a graph, you can click the graph to open a report view. You might also be able to drill down to the items in the report. If a Web part lists tasks, you can open a task and work it. You can also add custom Web parts to start processes, take further action, or help you perform other tasks.
Tickets **Tickets - Alternate View**	Displays the current tickets. By default, it lists the tickets that are assigned to you but it can also display other tickets. You can work tickets from this page. The alternate view presents a different layout, with the tickets listed on the left and the ticket contents on the page on the right.
Workflow	The **Workflow** page in the ServiceDesk portal provides administrators and managers with a comprehensive view of the current tasks and processes. The **Workflow** page has the following views: ■ **Workflow Task List** Lists all the tasks that are assigned to you. ■ **Workflow Process List** Lists all the active processes and their associated tickets. The processes are arranged in workflow category order.

Home page

The **Home** page in the ServiceDesk portal is the primary workspace for viewing the tickets that you submitted and performing other general ServiceDesk activities.

If your page was customized, its appearance and contents might differ from the default page.

See "About customizing the contents of ServiceDesk portal pages" on page 19.

Table 1-3 Default sections on the **Home** page

Section	Description
Bulletin Board This section is not labeled.	Lets you view the scrolling Bulletin Board messages that have been posted. For example, the messages can advertise current issues, announce outages, or provide information about a change that is planned to take place within the organization. You can stop the scrolling if you prefer. Bulletin Board messages can be made public or they can be restricted to specific users, groups, permissions, or organizational units. See "About the Bulletin Board" on page 46.
Search KB	Lets you search the knowledge base for articles. See "Searching the knowledge base" on page 47.
My Requests	Displays every request that you created along with its ticket number, name, age, percent complete, and status. You can select a ticket number to display the ticket's **Process View** page. The report that appears next to **Current Report** determines the contents of the list. You can print or export the report, search for data within the report, or select a different report. If the **Report Settings** option appears, you can click it to change the appearance or contents of the report. The options that are available depend on the type of ticket and your permissions. For example, you might be able to limit the number of records that appear, filter the display, or enter additional parameters for the report. See "Options for customizing a ServiceDesk portal page list" on page 27. See "Changing the report for a ServiceDesk portal page list" on page 28.

Discussions page

The **Discussions** page in the ServiceDesk portal lets you start, view, and participate in discussions. The **Discussions** page displays the discussions that you have permission to view, and lets you expand the discussion posts.

If your page was customized, its appearance and contents might differ from the default page.

See "About customizing the contents of ServiceDesk portal pages" on page 19.

Table 1-4 Default options on the **Discussions** page

Option	Description
 **Actions**	Opens a drop-down list of options that let you edit or delete the selected discussion item. The option to delete is not available if the item has one or more posts or responses.
	The location of this symbol determines its action as follows: ■ **Add Discussion** ■ **Add Thread** ■ **Add Post**
 **Delete**	Appears on the **Actions** drop-down list and lets you delete the selected discussion item. This option is not available if the item has one or more posts or responses. However, you can still delete the thread or the main discussion. First, you must delete the lowest level of the discussion, and then work backwards to the highest level. By deleting this information, you also delete the posting history.
	The location of this symbol determines its action as follows: ■ **Edit Discussion Info** ■ **Edit Thread Info** ■ **Edit Thread Item**
Search	Lets you type the search text. The search results display any discussions whose posts contains the search text.
Show Discussions Rated	Lets you filter the list of discussions that appears. The users who read the discussion posts can provide the ratings.
 **Reply**	Opens the **Reply** dialog box, where you can type and save a reply to the selected discussion item.

FSC page

The **FSC** (Forward Schedule of Change) page in the ServiceDesk portal lets managers plan changes and releases that coordinate with the existing schedule.

By considering the entire schedule, the managers can avoid unforeseen schedule conflicts. It also lets users view the scheduled changes that might affect them.

If your page was customized, its appearance and contents might differ from the default page.

See "About customizing the contents of ServiceDesk portal pages" on page 19.

Table 1-5 Default sections on the **FSC** page

Section	Description
Schedules	Lists the all the schedules that have been defined. You can add, edit, and delete schedules, and you can select the schedules that appear on the **Schedule Entries** calendar.
Search Schedule Entry	Lets you perform a text search for a schedule entry.
Profiles	Provides profile metadata for the schedule entries.
Service Catalog	Links to the Service Catalog items.
Schedule Entries	Displays the calendar. The monthly view is the default. This section also displays the results of a schedule entry search.

Knowledge Base page

The **Knowledge Base** page in the ServiceDesk portal lets you view and manage knowledge base items. You can edit existing items and you can add new items outside the normal knowledge base process.

The **Knowledge Base** page appears by default when you click the **Knowledge Base** tab.

If your page was customized, its appearance and contents might differ from the default page.

See "About customizing the contents of ServiceDesk portal pages" on page 19.

Table 1-6 Default sections on the **Knowledge Base** page

Section	Description
Search	Lets you search for knowledge base items. The body text of the items is searched for the search text that you enter.
Categories	Lets you select the category for which to display knowledge base items. You can include the items that are designated as obsolete by checking **Show Obsolete Articles**. You can also create a new knowledge base category.
Service Catalog	Lets you view and use the services in the Service Catalog that you have permission for. The service entries are categorized in folders. When you select a folder, the service entries in that category appear at the right of the portal page. You can click the service item name to perform the action. You can hide the description that appears under each service item by checking the **Hide Description** check box in this section.
All Articles	Displays the articles that are in the category that you selected under **Categories**. Your permissions determine the articles that appear and what you can do with them.

My Task List page

The **My Task List** page in the ServiceDesk portal lets you view and work on the tasks that are assigned to you. The **My Task List** page is the primary workspace for working on your tasks.

If your page was customized, its appearance and contents might differ from the default page.

See "About customizing the contents of ServiceDesk portal pages" on page 19.

Table 1-7 Default sections on the **My Task List** page

Section	Description
Bulletin Board This section is not labeled.	Lets you view the scrolling Bulletin Board messages that have been posted. For example, the messages can advertise current issues, announce outages, or provide information about a change that is planned to take place within the organization. You can stop the scrolling if you prefer. Bulletin Board messages can be made public or they can be restricted to specific users, groups, permissions, or organizational units. See "About the Bulletin Board" on page 46.

Table 1-7 Default sections on the **My Task List** page *(continued)*

Section	Description
Recent Items	Displays the items that you recently viewed, opened, or worked on. You can select a recent item to open it. By default, the last 10 items are displayed. You can change the number of items by clicking **Max Recent Items Count**. You can bookmark an item that is important to you. If you click the star symbol next to an item, that item is locked to the list even if 10 newer items exist.
Find Task	Lets you find a task by specifying its task number. You can view only the tasks for which you have the appropriate permissions.
Find Ticket	Lets you find a ticket by specifying its Process ID. You can view only the tasks for which you have the appropriate permissions.
Tasks Viewer	Displays the tasks that are assigned to you. You can select a task number to display the task's **Process View** page. If you have tasks in multiple processes, you must expand the appropriate process heading for the task that you want to work with. The report that appears next to **Current Report** determines the contents of the list. You can print or export the report, search for data within the report, or select a different report. If the **Report Settings** option appears, you can click it to change the appearance or contents of the report. The options that are available depend on the type of ticket and your permissions. For example, you might be able to limit the number of records that appear, filter the display, or enter additional parameters for the report. See "Customizing a ServiceDesk portal page list" on page 26. See "Changing the report for a ServiceDesk portal page list" on page 28.

Submit Request page

The **Submit Request** page in the ServiceDesk portal lets you submit tickets and perform other self-service actions. The service items that are available depend on your permissions. For example, a user can submit an incident and a support technician can submit a change request.

A service item is a repeatable self-service action that performs a common task. The default service items represent common ServiceDesk actions. For example, the actions to submit an incident or to submit a request for a knowledge base article are default service items.

Your organization can create custom service items. For example, you might use a service item to request new equipment or to perform a self-service fix for an incident that you submitted.

If your page was customized, its appearance and contents might differ from the default page.

See "About customizing the contents of ServiceDesk portal pages" on page 19.

Table 1-8 Default sections on the **Submit Request** page

Section	Description
Search Service Item	Lets you search for a specific service item by **Title** or **Description**. This search feature is useful when you do not know which folder contains the service item that you need.
Service Catalog	Lets you view and use the services in the Service Catalog that you have permission for. The service items are categorized in folders. When you select a folder, the service items in that category appear at the right of the portal page. You can click the service item name to perform the action. You can hide the description that appears under each service item by checking the **Hide Description** check box in this section.
New Request (right side)	Displays the service items for the folder that you selected under **Service Catalog**. The service items that are available depend on your permissions.

Chapter 2

Managing your ServiceDesk portal pages

This chapter includes the following topics:

About customizing the contents of ServiceDesk portal pages

The ServiceDesk portal consists of pages, from which all ServiceDesk activities are performed. The portal pages can be customized to meet your organization's specific requirements.

Examples of the customizations that can be made are as follows:

- An administrator configures a different **My Task List** page for each group.

- An individual adds a search capability to their own **Home** page.
- A support manager customizes their **Tickets** page and then shares it with the rest of the support group.
- An administrator customizes a **Process View** page for a specific type of worker. For example, a high-level support technician might need additional actions.

Administrators can perform all the customization actions and can grant customization permissions to other ServiceDesk users. Non-administrator users typically have fewer options for customizing portal pages.

Customizing portal pages consists of the following actions:

- Adding and deleting pages
- Specifying which pages can be customized
- Adding, editing, and deleting the Web parts that appear on a page
- Sharing pages with other users

See "Customizing your ServiceDesk portal pages (non-administrator)" on page 21.

You can also set a portal page to be the page that opens whenever you log on to the ServiceDesk portal.

See "Setting your opening portal page" on page 20.

Setting your opening portal page

Whenever you log on to the ServiceDesk portal, the portal opens to a specific page.

See "Logging on to the ServiceDesk portal" on page 9.

Initially, your permissions determine which page opens. However, you can set a different page to open when you log on. This page does not necessarily have to be the one that is labeled the **Home** page.

To set your opening page

1. In the ServiceDesk portal, open the page to make your home page.
2. At the bottom of the portal window, click **Make Home Page**.

Customizing your ServiceDesk portal pages (non-administrator)

You can customize any of your portal pages if you have permission to do so. The pages that you are most likely to customize are the **Task List** page and the **Home** page. For example, you might want to place a schedule on your **Home** page.

Before anyone can customize a ServiceDesk portal page, the administrator must enable that page for customization.

To customize a ServiceDesk portal page

1. In the ServiceDesk portal, go to the page to customize.
2. In the upper right of the page, in the **Site Actions** drop-down list, select one of the following options:

Modify Page	Lets you add, edit, and delete the Web parts that are on the page.
Modify My Page	The **Modify Page** option changes the page for everyone who has access to it. The **Modify My Page** option changes your version of the page only. See "Adding a Web part to a ServiceDesk portal page" on page 23. See "Editing or deleting a Web part on a ServiceDesk portal page" on page 24.
Reset to Default	Discards any changes that you made to the portal page and reverts it to its original configuration.
Share Page	Lets you specify a user, group, permission, or organizational unit can view your customized version of the portal page. See "Sharing a ServiceDesk portal page" on page 25.

   This drop-down list appears only on the pages that you have the permission to customize. The options that are available depend on your permissions.

   See "Options on the Site Actions drop-down list" on page 21.

3. When you finish the customization, you can close the page.

Options on the Site Actions drop-down list

The Site Actions drop-down list contains the options that are available for customizing a ServiceDesk portal page. This drop-down list appears only on the pages that you have the permission to customize. The options that are available depend on your permissions.

The options that are available also depend on where you are in the editing process. For example, when you are on a main portal page, the **Edit Page** option does not appear in the **Site Actions** drop-down list. However, after you click **Site Actions > Modify Page** and the page opens for editing, the **Edit Page** option becomes available.

Table 2-1 Options on the **Site Actions** drop-down list

Option	Description
Add Root Page	Lets you add a new portal page, which is visible from the top level of the ServiceDesk portal. The page name appears on the tab bar in the upper area of the ServiceDesk portal. Typically, only administrators have permission to create new pages.
Add Sub Page	Lets you add a new subpage, which is one or more levels under a root page. A subpage can appear on the menu of a root page. For example, the **Knowledge Base** page is a root page. You open it by clicking the **Knowledge Base** tab in the ServiceDesk portal. The **Discussions** page is a subpage. You open it by clicking the **Discussions** command on the **Knowledge Base** tab. Typically, only administrators have permission to create new pages.
Add Web Part	Lets you add one or more Web parts to the page. The sections on a ServiceDesk portal page are in the form of Web parts. See "Adding a Web part to a ServiceDesk portal page" on page 23.
Browse	Exits the editing mode and displays the page with the changes that you made.
Clear	Deletes all the Web parts from a portal page. **Warning:** This action cannot be undone. Use caution when you select this option because you are not prompted to confirm this action before the deletion occurs.
Edit Definition	Displays the **Pages List** page, which lets you configure customization settings and customization privileges for the current portal page. Typically, only administrators have permission to edit page definitions.
Edit Page	Lets you edit and delete the Web parts that are on the page. See "Editing or deleting a Web part on a ServiceDesk portal page" on page 24.
Modify Page	Lets you add, edit, and delete the Web parts that are on the page. The page is changed for everyone who has access to it.
Modify My Page	Lets you add, edit, and delete the Web parts that are on the page. Only your page is changed. This option appears only if the page is configured to allow it.

Table 2-1 Options on the **Site Actions** drop-down list *(continued)*

Option	Description
Page List	(Administrator only) Displays the **Pages List** page that lets you configure settings and customization permissions for any portal page.
Reset to Default	Discards any changes that were made to the portal page and reverts it to its original configuration. Portal page changes can be reverted as follows: ■ A user can discard the changes that they made with the **Modify My Page** option. ■ A user can discard the changes that someone else made with the **Modify My Page** and **Share Page** options. ■ A user cannot discard the changes that someone else made with the **Modify Page** option. However, assuming that the user has the permission to do so, they can delete the individual web parts that someone else added.
Share Page	Lets you specify a user, group, permission, or organizational unit that can view your customized version of a portal page. For example, the support manager can customize the **Task List** page and then share it with members of the Support 1 group. You can also provide additional permissions for this page as follows: ■ Let others edit this page. ■ Provide view, edit, and delete permissions to a specific user, group, permission, or organizational unit. For example, the administrator customizes a page, lets all users in a group view the page, and then lets a specific user edit the page.

Adding a Web part to a ServiceDesk portal page

The sections on a ServiceDesk portal page are in the form of Web parts. You can customize a portal page by adding one or more Web parts.

After you add a Web part, you can edit its properties.

See "Editing or deleting a Web part on a ServiceDesk portal page" on page 24.

To add a Web part to a portal page

1. In the ServiceDesk portal, access the page to customize.
2. In the upper right of the page, in the **Site Actions** drop-down list, select one of the following options:

Modify Page	Changes the page for everyone who has access to it.
Modify My Page	Changes your version of the page only.

3. After the page refreshes, in the **Site Actions** drop-down list, click **Add Web Part**.
4. In the **Catalog Zone** pop-up, select the catalog that contains the Web part to add.
5. In the **Catalog Zone** pop-up, under **Profiles**, select the check box for each Web part to add.
6. In the **Catalog Zone** pop-up, in the **Add to** drop-down list, select the page zone to add the Web part to.

   The zones that are available depend on the page's **Template Page** setting, which the administrator sets.
7. Click **Add**.
8. (Optional) To add another Web part, repeat from step 4.
9. When you finish adding Web parts, in the **Catalog Zone** pop-up, click **Close**.

Editing or deleting a Web part on a ServiceDesk portal page

The sections on a ServiceDesk portal page are in the form of Web parts. You can customize a portal page by editing or deleting one or more Web parts.

To edit a Web part on a portal page

1. In the ServiceDesk portal, access the page to customize.
2. In the upper right of the page, in the **Site Actions** drop-down list, select one of the following options:

Modify Page	Changes the page for everyone who has access to it.
Modify My Page	Changes your version of the page only.

3. In the upper right of the Web part to edit, click the **Verbs** symbol (orange lightning), and then select one of the following options:

Edit	Lets you edit the properties of the Web part.
Delete	Lets you delete the Web part.

4 If you clicked **Edit**, in the **Editor Zone**, edit the properties of the Web part, and then select one of the following options:

Apply	Saves the changes without closing the **Editor Zone**.
OK	Saves the changes and closes the **Editor Zone**. Select this option when you finish editing the properties for the current Web part.

5 (Optional) To edit or delete another Web part, repeat from step 3.

6 When you finish editing the Web parts, you can close the page or continue to edit it.

Sharing a ServiceDesk portal page

You can share your version of a ServiceDesk portal page with others to let them see any customizations that are on your page. Typically, you share the pages that you or someone else has customized.

You can share pages by providing the view, edit, and delete permissions to specific users, groups, permission, or organizational unit. For example, the administrator can customize a page and let all users in a certain group view the page. Then the administrator can let only one specific user within that group edit the page.

The users' portal permissions override any share permissions that you might provide. For example, a user who does not normally have permission to view the **Tickets** page cannot view a shared version of that page.

To share a ServiceDesk portal page

1 In the ServiceDesk portal, access the page to share.

2 (Optional) Customize the page.

See "Customizing your ServiceDesk portal pages (non-administrator)" on page 21.

3 In the upper right of the page, in the **Site Actions** drop-down list, click **Share Page**.

4 Under **Page Permissions**, review the users, groups, or other entities that have permissions for this page.

5 Under **Share Page**, select an option in each of the following subsections:

Share With	Select the type of entity to give permissions for sharing this page.
Sharing Type	Select the type of share permissions to give. The **Custom(Advanced)** option provides additional ways to customize the permissions.

6 Under **Share Page**, click **Next**.

7 Specify the user, group, or other entity to share this page with, and then click **Share Page**.

8 When you are returned to the page, you can continue to edit it or close it.

Customizing a ServiceDesk portal page list

Several ServiceDesk portal pages contain the lists that you use to analyze or perform ServiceDesk activities. You can customize the lists that appear on your pages so that they display the information in the manner that is most useful to you. For example, on the **My Task List** page, you might want to change the task list so that it displays only your overdue tasks.

Examples of portal page lists are as follows:

- The task list that appears in the **Task Viewer** section on the **My Task List** page
  See “My Task List page” on page 16.
- The request list that appears in the **My Requests** section on the **Home** page
  See “Home page” on page 13.
- The tickets that appear in the **My Open Tickets** section on the **Tickets** page

The primary way to customize a portal page list is to change the report that determines the contents of the list. You can also sort and filter the list to display a more specific subset of information. The changes that you make are active for the current session only. When you log off of ServiceDesk, the changes are lost. However, you can set a new default report that persists beyond a single session.

See “Changing the report for a ServiceDesk portal page list” on page 28.

To customize a ServiceDesk portal page list

1 In the ServiceDesk portal, click the tab that contains the list to edit.

2 On the page, under the list section, you can customize the list in the following ways:

   - Sort the columns.

- Search and filter the list.
- Limit the number of records that appear.
- Select a new report.
- Set a new default report.
- Refresh the report.

See "Options for customizing a ServiceDesk portal page list" on page 27.

3 When you finish customizing the list, you can close the page or work on it.

Options for customizing a ServiceDesk portal page list

You can customize a portal page list so that it displays information in the manner that is most useful to you.

Examples of portal page lists are as follows:

- The task list that appears in the **Task Viewer** section on the **My Task List** page
  See "My Task List page" on page 16.
- The request list that appears in the **My Requests** section on the **Home** page
  See "Home page" on page 13.
- The tickets that appear in the **My Open Tickets** section on the **Tickets** page

Table 2-2 Options for customizing a ServiceDesk portal page list

Option	Symbol	Description
Sort the columns.	None	You can click any column heading to sort by that heading.
Search and filter the list.		You can search the list to filter the results. For example, to list only those items that have to do with printers, you can search for "printer". You can filter a list by using either of the following options: ■ The **Search** symbol. You can click the **Search** symbol to open a search box. ■ The search feature under **Report Settings**. You can expand the **Report Settings** section and click **Text contains** to open a search dialog box. You might not see the **Support Settings** section because it appears for certain reports only.

Table 2-2 Options for customizing a ServiceDesk portal page list *(continued)*

Option	Symbol	Description
Limit the number of records that appear.	**Report Settings**	Lets you change the number of records that appear in the list. Typically, the list contains the first 50 records that match the report criteria. You can change the number of records that appear by expanding the **Report Settings** section, clicking the **Return 50 first records** link, and specifying a new number. You might not see the **Support Settings** section because it appears for certain reports only. Other options might appear depending on the type of ticket.
Select a new report.		You can select a new report to display the list in a different configuration. For example, you select a report that displays all your open tasks. You can select a new report by clicking either of the following options: ■ The Reports symbol ■ The Current report name Both options open a list of folders, which contain the reports that are available. See "Changing the report for a ServiceDesk portal page list" on page 28.
Set a new default report.		Lets you set the Current report as the default for this page. See "Changing the report for a ServiceDesk portal page list" on page 28.
Refresh the report.		Lets you refresh the display after you select a new report.

Changing the report for a ServiceDesk portal page list

Each list on a ServiceDesk portal page is associated with a default report that determines the contents of the list. You can change the report to display the list in a different configuration. For example, you can select a report that displays all your open tasks.

When you change the report for a list, it is active for the current session only. The next time that you log on, the default report reappears.

You can also set a new default report that persists beyond a single session. You can select a predefined report or a customized report.

Setting the default report for a list does not save any additional filtering of the list.

To change the default report for a ServiceDesk portal page list

1. In the ServiceDesk portal, click the tab that contains the list to edit.
2. On the page, under the list section, click either the Current report name or the reports symbol.
3. Select the report group, and then select the report to use.

   To quickly find a report, you can type search text in the box and click **Find**.
4. (Optional) To make the new report selection the default report, in the list section, click the **Actions** symbol (orange lightning), and then click **Set default report**.
5. When you finish customizing the list, you can close the page or work on it.

Chapter 3

Submitting incidents

This chapter includes the following topics:

Incident statuses

The incident status accurately reports the progression and outcome of the stages of the Incident Management process. The percentage represents the level of completion that the process has reached. For example, if the status percentage is 60, it means that the process is 60 percent complete.

The status and percentage appear in several places in the ServiceDesk portal. For example, they appear at the top of the ticket's **Process View** page.

Table 3-1 Incident statuses

Status	Description	Completion percentage
Closed	All manual actions and automated actions within the process are complete and the incident is closed.	100%
Escalated	The incident was escalated to a designated person or group for resolution.	70%
Hold	The incident is scheduled for later and is placed on hold. Typically, this status means that more research or analysis needs to be performed.	25%
Open	The incident was submitted and is ready to be worked.	10%
OUT OF TIME	The incident's due date passed and the incident was not resolved.	20%
Reopened	The user reviewed the incident and reopened it, which indicates that the incident is not fixed or the user is dissatisfied with the resolution.	30%
Resolved	A resolution for the entire incident was provided and the incident is ready for the user's approval. The resolution must apply to the entire incident, not to a single subtask.	90%
Responded	One or more of the incident's subtasks were responded to, regardless of whether a resolution was provided.	50%
Subtasks Created	One or more subtasks were created and assigned for the incident.	50%
Time out/Exception	The incident exceeded the SLA window, therefore the incident is escalated.	20%

Submitting an incident

A user who has a problem and cannot find a resolution in the organization's knowledge base can create an incident to report the problem. The user creates the incident in ServiceDesk using the general incident form. This form contains the minimum amount of information that is required to create an incident.

When you create an incident, you can perform the following actions:

- Attach a file to the incident.

See "Attaching a file to a new incident" on page 36.

- Capture a screen image and attach it to the incident.

If your ServiceDesk administrator allows it, you can also submit an incident by email.

See "Submitting an incident by email" on page 34.

To create an incident in ServiceDesk

1. In the ServiceDesk portal, click **Submit Request**.
2. On the right side of the page, click the **New Service Desk Request** link.
3. (Optional) To create an incident on behalf of another user, next to **Who does this issue affect?**, click **Someone Else**, and then click the **Search for User** link.

   Search for and add the user.
4. On the **Create a New Incident** page, enter information about the problem, and then click **Continue**.

   See "Create a New Incident page" on page 35.
5. To search the knowledge base or Service Catalog for any articles or self-service items that are related to your problem, click **Search KB**.

   See "Searching the knowledge base" on page 47.

   After the search, the options are as follows:

Answer Found	Lets you exit the incident submission process if you found an answer to your problem.
Continue with Incident	Lets you return to the **Create a New Incident** page if you did not find an answer to your problem.

6. If ServiceDesk has a record of the equipment that is assigned to you, the **Select Equipment** page appears. Select any equipment that this issue affects, and then click **Continue**.

   For example, if the incident involves a printer jam, you can select the printer that is jammed.
7. If you selected **Blocking Critical Business** as the urgency, on the **Critical Business Details** page, provide more information about the urgency, and then click **Continue**.

8 If the title or description of your incident matches that of a knowledge base article, the process suggests the articles that might provide a resolution. Your options are the same as in step 5.

9 On the **Review Your Request** page, verify that the information is correct, and then click **Submit**.

If the information is not correct, you can click **Edit** to return to the incident.

10 When the **Thank You For Your Submission** page appears, make a note of the incident ID.

This number identifies the incident in any future communications.

11 Click **Close** to exit the incident submission process or **Start Another** to open a new incident.

Submitting an incident by email

A user who has a problem and cannot find a resolution in the organization's knowledge base can report the problem by email. The incident is created automatically and assigned to a support group.

Your ServiceDesk administrator determines whether this feature is available.

When you create a new email message to report an incident, be sure to include the following information:

To submit an incident by email

◆ Create and send an email message that contains the following information:

Address	Use the address that your support organization provides.
Subject	Include any of the following phrases: ■ New Incident ■ New Ticket ■ Any other word or phrase that your support organization might require.
Message body	Provide details about the issue or provide any other information that your support organization requires. You might be provided with an email template to follow. If you leave the message body blank, this email might be classified as junk.

Create a New Incident page

This page lets you create an incident.

See "Submitting an incident" on page 32.

Table 3-2 Options on the **Create a New Incident** page

Option	Description
Who does this issue affect?	Lets you specify whether this issue affects you or someone else.
Search For User	Opens the **Select User** page, where you can specify the person who this issue affects. This link appears only when you specify that this issue affects someone else.
What is your issue?	Lets you type a brief description of the issue. Make this description as specific as possible. For example, instead of "email problem," you might type "Cannot receive external email". This description becomes the incident title, which identifies this incident in any incident lists in the ServiceDesk portal.
Details that might help resolve this issue	Lets you type additional information to describe the issue. For example, you might describe the steps to reproduce the issue or provide more information about what happened. The toolbar that appears in this section provides common text formatting tools.
Needed By Date	Lets you select the date on which this issue must be resolved. When you check this check box, a drop-down list appears. It lets you select the date from a calendar pop-up.
Change Location	Lets you specify the location that the incident affects. The location is for informational purposes only. When you click this link, the **Affected Location** page appears. It displays your default location but you can change it when you report the incident from a different location.
Urgency of this need or issue	Lets you specify the severity of the issue. The options are as follows: ■ **No Immediate Urgency** ■ **Preventing Some Non-Urgent Work** ■ **Blocking Critical Business** Your organization or your manager might provide guidelines for when to use each of these options.

Table 3-2 Options on the **Create a New Incident** page *(continued)*

Option	Description
Who is affected?	Lets you specify how many people this issue affects. This information is combined with the urgency information to prioritize the incident. The options are as follows: ■ **Single User** ■ **Entire Team or Group** ■ **Entire Department** ■ **Unsure**
Add File	Lets you attach one or more files that provide additional information about the incident. For example, you can attach an error log file or a screen image that you captured. See "Attaching a file to a new incident" on page 36. See "Attach File to Incident dialog box" on page 37. Any files that you attach appear in the **Supporting Documents or Images** list.
Remove File	Lets you remove a file that is attached to the incident. The attached files are listed under **Supporting Documents** or **Images**.
Take Screenshot	Starts the Screen Capture utility so that you can capture an image of your computer screen, which you can attach to an incident. The Screen Capture utility also lets you edit the image. See "Screen Capture icons" on page 54.
Search KB	Lets you search the knowledge base for any articles that are related to your issue. You might find an article that answers your question and eliminates the need to submit an incident. See "Searching the knowledge base" on page 47.

Attaching a file to a new incident

During incident entry, you can attach one or more files to an incident to provide additional information about the issue. For example, you can attach an error log file or a screen image that you captured. Files larger than 4 MB are not supported.

You can also attach a file to an incident after it has been created.

The files that you attach to an incident are added to the **Documents** tab in the ServiceDesk portal. The files appear in a folder whose name is the incident number.

To attach a file to an incident

1. On the **Create a New Incident** page, click **Add File**.

   See "Submitting an incident" on page 32.

2. In the **Attach File to Incident** dialog box, in **File to Add**, select a file.
3. (Optional) To add another file, click **Add Another**, and then select a file.

   Repeat this step for every additional file that you want to add.

4. When you finish adding files, click **Add/Close**.
5. On the **Create a New Incident** page, continue to enter information about the incident.

   See "Create a New Incident page" on page 35.

Attach File to Incident dialog box

This dialog box lets you attach one or more files to an incident to provide additional information about the issue. This dialog box appears when you choose to attach a file during the incident entry.

See "Attaching a file to a new incident" on page 36.

Table 3-3 Options in the **Attach File to Incident** dialog box

Option	Description
File to Add	Specify the file to add. You can add documents, spreadsheets, text files, logs, and many other file formats.
Current Attachments	Displays the files that are already attached to the ticket. The **Remove** link that appears next to each file lets you remove a file from the ticket.
Add Another	Adds the file to the **Current Attachments** list and lets you specify another file to attach without leaving the **Attach File to Incident** dialog box.
Add/Close	Adds the current attachments and closes the dialog box.

Capturing a screen image in an incident

When you create an incident, you can capture an image of your computer screen to help the ServiceDesk workers analyze the problem. For example, if an error message appears when you try to use an application, you can capture the message and attach it to the incident.

Before you can capture a screen image, you must have the Screen Capture Utility installed.

For more information, see the topics about installing the Screen Capture Utility in the *ServiceDesk Implementation Guide*.

To capture a screen image in an incident

1. On the **Create a New Incident** page, click **Take Screenshot**.

   See "Submitting an incident" on page 32.

2. If the Screen Capture utility does not open automatically, on the **Screen Capture** page, click one of the following links:

Click Here to Start Capturing	Opens the Screen Capture utility. If the utility does not open, then it probably is not installed on your computer.
Click Here to Install	Installs the Screen Capture utility if it is not installed.

3. In the **Screen Capture** window, select one of the icons to capture the image.

   See "Screen Capture icons" on page 54.

4. (Optional) You can edit the image in the following ways:

   - Add a note.
   - Draw a rectangle.
   - Crop the image.

5 When the image is finished, select one of the following symbols:

Send to Process Manager

Places the image on the **Screen Capture** page. When you click **Completed** on the **Screen Capture** page, the file is saved and attached to the incident.

Save to File

Displays the **Save As** dialog box, where you can type a name for the file, and then click **Save**.

You can attach the saved file to this incident, to any other incident or ticket, or to any other document.

Copy to Clipboard

Copies the captured image to the clipboard so you can paste it into a different image or any other document. You can return to the **Screen Capture** page and click **Cancel** to return to the incident.

6 When you finish the capture, you can close the **Screen Capture** window to return to the **Screen Capture** page, and then click **Cancel** to return to the incident.

7 When you return to the **Create a New Incident** page, you can continue the incident entry.

Finding and reviewing your incidents

You can review the incidents that you create. Although you cannot edit an incident, you can perform other actions that are related to the incident.

If the incident is open or in progress and you have the appropriate permissions, you can perform the following actions:

- Add a comment.
- Add or remove bulletin board entries.
- Add, remove, or manage the equipment that is associated with the incident.
- Send an email.
- Search the knowledge base.
- Open a chat session.

If the incident is closed, you can only view it.

To find and review an incident

1. In the ServiceDesk portal, click **Home**.
2. Under **My Requests**, if the incident is not listed, click the **Search** symbol, enter one or more keywords in the search box, and then click **Find In Report Data**.
3. Under **My Requests**, select the incident by its ticket number.
4. On the incident's **Process View** page, view the incident or take whatever actions are necessary.
5. When you finish, close the incident window.

Confirming an incident's resolution

After an incident is resolved, it appears in the affected user's task list for review of its history, comments, and other information about its resolution.

Until you complete the confirmation task, the incident is considered to be 90 percent complete and open. If you do not respond within a specified number of days, the incident's status is changed from Resolved to Closed. Your ServiceDesk administrator determines the number of days that are allowed.

Table 3-4 Confirming an incident's resolution

Step	Action	Description
Step 1	Review the task and if necessary, take any steps that the support technician recommends.	You might need to take steps to resolve the issue yourself if the support technician provided instructions for doing so. For example, you might be directed to a knowledge base article or a Service Catalog option that contains resolution instructions.
Step 2	Test to confirm that the issue is fixed.	This step is important whether you resolved the issue or it was resolved for you.
Step 3	If the issue is not fixed or if you are dissatisfied with the resolution, re-open the incident.	When you re-open the incident, it is returned to a support technician. See "Re-opening an incident" on page 42. After you re-open the incident, wait for another task to notify you that it is resolved.

Table 3-4 Confirming an incident's resolution *(continued)*

Step	Action	Description
Step 4	If the issue is fixed, close the incident.	If you are satisfied with the resolution, you can mark the incident as resolved. The incident is closed. See "Reviewing and closing a resolved incident" on page 41. When you confirm that an incident is resolved, you might be asked to complete a Customer Satisfaction Survey.

Reviewing and closing a resolved incident

After an incident is resolved, it appears in the affected user's task list for review of its history, comments, and other information about its resolution.

See "Confirming an incident's resolution" on page 40.

If the resolution fixes the issue, you can confirm the fix.

To submit feedback on an incident resolution

1. In the ServiceDesk portal, click **My Task List**.
2. Under **Task Viewer**, under **Project Name**, expand **SD.Incident Management**.
3. In the list of tasks, find and open the task that requires feedback.
4. On the incident's **Process View** page, review the information that appears under **History**, and then expand the **Documents** section and read any documents as appropriate.
5. Expand the **Actions** section, and then click **Click Here To Review and Close Your Incident**.
6. On the **Issue Resolved** page, review the details about the resolution and if you are satisfied with the resolution, click **Issue Resolved**.
7. If the **Welcome** page of the Customer Satisfaction Survey appears, follow the on-screen instructions to provide feedback and when you finish, click **Continue**.
8. When the **Thank You** page appears, you can close the page, and then you can close the incident's **Process View** page.

Re-opening an incident

After an incident is resolved, it appears in the affected user's task list for review of its history, comments, and other information about its resolution.

See "Confirming an incident's resolution" on page 40.

If the issue is not fixed or if you are dissatisfied with the resolution, you can re-open the incident.

Re-opening an incident creates a duplicate incident that refers back to the original one. The duplicate incident is returned to a support technician. The technician either resolves the issue or escalates it to a higher level of support. When the incident is resolved again, you are asked to verify the resolution and provide feedback.

See "Reviewing and closing a resolved incident" on page 41.

To re-open an incident

1. In the ServiceDesk portal, click **My Task List**.
2. Under **Task Viewer**, under **Project Name**, expand **SD.Incident Management**.
3. In the list of tasks, find and open the task that requires feedback.
4. On the incident's **Process View** page, expand the **Actions** section, and then click **Click Here To Review and Close Your Incident**.
5. On the **Issue Resolved** page, review the details about the resolution and if you are not satisfied with the resolution, click **Re-Open Issue**.
6. On the **Reason for Re-Opening Issue** page, in the text box, type an explanation of why you need to re-open the incident.

   Provide details about the steps that you took to test the fix and the results of your test.

7 (Optional) You can attach files to the incident to support your explanation.

The options are as follows:

Add File	Lets you attach one or more files that provide additional information about the incident. For example, you can attach an error log file or a screen image that you captured. See “Attaching a file to a new incident” on page 36.
Remove	Lets you remove a file that is attached to the incident. The attached files are listed under **Supporting Documents** or **Images**.
Take Screenshot	Starts the Screen Capture utility so that you can capture an image of your computer screen, which you can attach to an incident. The Screen Capture utility also lets you edit the image. See “Screen Capture icons” on page 54.

8 On the **Reason for Re-Opening Issue** page, click **Continue** to submit the re-opened incident.

Chapter 4

Using the knowledge base

This chapter includes the following topics:

About the knowledge base in ServiceDesk

The ServiceDesk knowledge base is a data repository that contains your organization's knowledge. The knowledge base can contain articles and other information that can help you solve an issue before you report it as an incident.

You can access the knowledge base to obtain self-service resolution of common problems. When you submit an incident, you can search the knowledge base to determine if there is a solution to the incident. If you find a solution, you might be able to implement the solution on your own. This self-service can reduce the number of incidents that you submit and provide quicker resolutions to your issues.

Access to knowledge base items is controlled through permissions. Permissions can be set on any knowledge base item at the user, group, or organizational unit level. Only an administrator or other user with the appropriate permissions can set permissions for a knowledge base item.

Submitting a request for a knowledge base entry

Before it can be added to the knowledge base, most new content must go through the knowledge base approval and review process.

This task is a step in the process for creating a knowledge base entry.

The knowledge base article request is created, and a confirmation screen displays the process ID for the entry request. The proposed knowledge base entry now goes to a knowledge base editor, who approves or denies the request. Click **Close** to close the dialog.

To submit a request for a knowledge base entry

1. In the ServiceDesk portal, click **Submit Request**.
2. On the **Requests** page, under **New Requests** and under **Service Catalog**, click **Knowledge Base**.
3. On the right side of the page, click the **Submit KB entry** link.
4. In the **Entry Request** dialog box, define the entry as follows:

Title	Type a title to identify this entry in any article lists or search results in the ServiceDesk portal. When you type the title, make it as specific as possible so that it quickly conveys the purpose of the entry. For example, instead of “printer jam,” you might type “Clearing a printer jam”.
Content	Type and format the content for the proposed entry.

5. In the **Entry Request** dialog box, click **Submit**.
6. In the **Thank You** dialog box, click **Close**.

About the Bulletin Board

The Bulletin Board is a Web part that appears on most of the main pages in the ServiceDesk portal. It contains any number of messages, which scroll up the Bulletin Board section. A bulletin board message provides users with time-sensitive, critical information.

The bulletin board messages are components of the ServiceDesk knowledge base. However, the Bulletin Board provides a proactive way to display the time-sensitive messages to ServiceDesk users without requiring them to access the **Knowledge Base** page.

Examples of how you can use the Bulletin Board are as follows:

- Inform users about critical, known issues.
  For example, if email access is down, you can let users know that IT is aware of the problem. As a result, you minimize further incident submissions for that issue.
- Inform users about upcoming outages and planned disruptions in service.
- Leave public or private messages for specific users, groups, or organizational units.
  Like the other items in the knowledge base, you can set permissions on bulletin board messages. Therefore, you can create messages for certain segments of your organization. You can also provide creation permissions so that others can create messages for the members of their groups or departments.

Bulletin Board messages can be created as a result of the Knowledge Management process or outside the process on the **Knowledge Base** page. Bulletin Board messages can also be created by using the **Add/Manage Bulletin Boards** action that appears on the **Process View** page of each ServiceDesk process.

Searching the knowledge base

You can search for knowledge base items on the **Knowledge Base** page.

The knowledge base searches are performed as follows:

- The search is performed on the item name.
- The search evaluates the items in all the knowledge base categories.
- Your permissions determine the categories and items that you can access, which in turn influences the results of your searches.

When you find a knowledge base item, you can open and view it or perform other actions.

To search the knowledge base

1 In the ServiceDesk portal, click **Knowledge Base**.

2 Under **Search**, enter the text to search for, and then click the **Search** symbol.

Viewing an item in the knowledge base

To view an item in the knowledge base

1 In the ServiceDesk portal, click **Knowledge Base**.

2 On the **Knowledge Base** page, take one of the following actions:

- Under **Search**, enter the text to search for, and then click the **Search** symbol.
- Under **Categories**, select a category that is likely to contain the item.

3 Under **All Articles**, scroll through the list of knowledge base items to find one that might provide the information you need.

   If you cannot find what you need, you can repeat step 2.

4 To open an item, click its article name or click the **Open** symbol (a magnifying glass) that appears at the far right of its name.

5 If the item contains multiple entries, you can expand and collapse them to view their information.

6 (Optional) Take any other actions that you need.

   Your permissions determine what you can do with a knowledge base item. For example, typical actions are to view the item's history, print it, or export it.

Chatting in the ServiceDesk portal

This chapter includes the following topics:

About chatting in the ServiceDesk portal

You can chat with other users within the ServiceDesk portal. Use the chat feature to communicate with others in real time by engaging in an instant message-style conversation.

The **Chat** Web part, which lets you participate in a chat session, appears by default on the **Process View** pages for process tickets. An administrator can add the **Chat** Web part and other chat-related Web parts to any place in the ServiceDesk portal.

You can join a chat session in the following ways:

From a chat invitation email	You can click the link in the invitation or paste the URL into a browser window to open the ServiceDesk portal to the chat window. If you are not logged on to the ServiceDesk portal, you are prompted to log on.
From the **Chat** Web part in a process ticket	By default, the **Chat** Web part appears on the **Process View** pages. It can also be added to other areas of the ServiceDesk portal. See "Chatting in the ServiceDesk portal" on page 50.
From the **Chat** Web part in other areas of the ServiceDesk portal	This Web part does not appear by default in areas other than process tickets. The administrator or other user with the appropriate permissions must add it. For example, the **Chat** Web part can be added to the **Home** page. See "Adding a Web part to a ServiceDesk portal page" on page 23.

The portal master settings contain settings for monitoring and saving ServiceDesk chat sessions.

Chatting in the ServiceDesk portal

You can chat with other users about a specific process ticket within the ServiceDesk portal. Use the chat feature to communicate with others in real time by engaging in an instant message-style conversation.

You can start a chat or join an existing one.

Users who are invited to join a chat receive an email notification. If the chat is conducted within a process ticket, the email message refers to the process ID.

See "About chatting in the ServiceDesk portal" on page 49.

To chat about a process ticket

1 Open the chat session as follows:

- In a chat invitation email, click the link in the invitation or paste the URL into a browser window.
  If you are not logged on to the ServiceDesk portal, you are prompted to log on.
- In the ServiceDesk portal, open the ticket that is associated with the chat. On the ticket's **Process View** page, expand the **Chat** section, and then click **Open Chat**.

- In the ServiceDesk portal, open any page that contains the **Chat** section (Web part).

2 If you need to invite participants, in the **Process Manager Chat** window, click **Invite New Participant**.

   Other participants can be added later. The ability to invite chat participants depends on your permissions.

   See "Inviting participants to a chat session" on page 51.

3 (Optional) In the **Process Manager Chat** window, you can select any of the options that appear.

   For example, you can capture a screen image and add it to the chat session. The options that are available depend on the type of ticket and your permissions.

   See "Process Manager Chat window" on page 52.

4 In the **Process Manager Chat** window, in the text box at the lower right of the page, type the chat message, and then click **Send**.

5 At any time during the chat session, you can click **Save**.

   This option opens the **Process Messages** dialog box, where you can save some or all of the chat messages to the process ticket's history.

   By default, chat messages are not saved.

6 You can leave the **Process Manager Chat** window open for the duration of the chat session or you can close it and reopen it later.

Inviting participants to a chat session

When you start a chat session, you must invite one or more participants. Other participants can be added later. The ability to invite chat participants depends on your permissions.

See "About chatting in the ServiceDesk portal" on page 49.

To invite participants to a chat session

1 Access the **Process Manager Chat** window.

   See "Chatting in the ServiceDesk portal" on page 50.

2 Click **Invite New Participants**.

3 In the **Invite Participants** dialog box, take any or all of the following actions:

- Expand the permissions folders and check the check box to the left of each user to invite.
- Click **Pick** and use the **User Picker** dialog box to search for and select a user.

  You can continue to pick as many users as necessary.

4. When you finish the user selection, in the **Invite Participants** dialog box, click **Invite**.
5. When the **Process Manager Chat** window reappears, you can start or resume the chat.

Process Manager Chat window

This window lets you start and participate in a chat session with other ServiceDesk users. The main section of the window displays the chat messages are they are added. The chat title appears at the top of the window. If the chat session is associated with a process ticket, the chat title is the same as the process name.

See "Chatting in the ServiceDesk portal" on page 50.

Table 5-1 Options in the **Process Manager Chat** window

Option	Description
PARTICIPANTS	Lists the workers who have been invited to participate in the chat session. A blue circle symbol to the left of a participant's name indicates that the participant is active in the chat.
Invite New Participant	Lets you invite one or more participants to the chat session. Participants can be added when the chat session is started and at any time thereafter. The ability to invite chat participants depends on your permissions. See "Inviting participants to a chat session" on page 51.
Process Actions	Lets you perform the actions that are associated with the process task. For example, a support technician who participates in a chat about an incident can resolve the incident or request a change. You can use this option only if you are assigned to perform one or more tasks in the process.
Screen Capture	Opens the Screen Capture utility, which lets you capture screen shots and attach them to the chat. The screen shot files remain available during the chat session. Unless you save the screen shot files, they are lost when the chat session ends.

Table 5-1 Options in the **Process Manager Chat** window *(continued)*

Option	Description
View/Save Files	Lets you view any files that are associated with the chat session and attach them to the process ticket. The options on the **Send Files** dialog box are as follows: ■ **view** Lets you open a file in a **Preview Page** dialog box. This link appears to the right of each file. ■ **Save** Lets you save and attach any files whose check box you check. The check box appears to the left of each file. Any files that you do not save are lost when the chat session is closed.
Open Process	Opens the **Process View** page for the associated process.
Save	Opens the **Process Messages** dialog box, where you can save some or all of the chat messages to the process ticket's history. If you do not save the chat contents, you cannot see them in the process ticket after the chat session is closed. An option in the portal master settings determines whether chat messages for are saved automatically for a specified number of days. The default is zero.
Send	Sends the message that you type to the chat session so that the other participants can read it.

Capturing a screen image during a chat session

During a chat session, you can capture an image of your computer screen to share with the other members of the chat session. For example, when you chat about a specific error message, you can capture the message and attach it to the process ticket.

Before you can capture a screen image, you must have the Screen Capture Utility installed.

For more information, see the topics about installing the Screen Capture Utility in the *ServiceDesk Implementation Guide*.

To capture a screen image during a chat session

1 See "Chatting in the ServiceDesk portal" on page 50.

2 In **Process Manager Chat** window, click **Screen Capture**.

3. In the **Screen Capture** window, select one of the icons to capture the image.

   See “Screen Capture icons” on page 54.

4. (Optional) You can edit the image in the following ways:

   - Add a note.
   - Draw a rectangle.
   - Crop the image.

5. When the image is finished, select one ofAccess the **Process Manager Chat** window.

   the following symbols:

Send

If you accessed the **Screen Capture** window from a chat session, this option creates a file for the captured image and sends it to the chat session.

Save to File

Displays the **Save As** dialog box, where you can type a name for the file, and then click **Save**.

You can attach the saved file to the current process ticket, to any other process ticket, or to any other document.

Copy to Clipboard

Copies the captured image to the clipboard so you can paste it into a different image or any other document.

6. When you finish the capture, you can close the **Screen Capture** window to return to the **Process Manager Chat** window.

7. In the **Process Manager Chat** window, you can continue the chat session.

Screen Capture icons

The **Screen Capture** window lets you capture an image on your computer screen so you can attach it to a task or a process ticket. The icons that appear on this page represent the screen capture operations that you can perform. Some of these icons appear only during specific operations. For example, the editing icons do not appear until you capture a screen image.

Table 5-2 Options in the **Screen Capture** window

Icon	Description
	**Add Note** Lets you add text to a captured image. When you click this symbol, additional icons appear at the left of the **Screen Capture** window to let you format the note.
panning arrows	Panning arrows let you move the image up, down, left, and right within the **Screen Capture** window when the image is larger than the window.
	**Capture Delayed** Lets you set an amount of time to wait before the image is captured.
	**Capture Region** Captures a specific part of the screen, which you select. For example, you might select an error message or a portion of the screen that shows the options you selected before an error occurred.
	**Capture Screen** Captures the entire screen, minus the **Screen Capture** window.
	**Change Border Color**
	**Change Border Width**
	**Change Fill**
	**Change Font**
	**Change Font Color**
	**Copy to Clipboard** Lets you paste the copied image into any other application.
	**Crop Image**

Table 5-2 Options in the **Screen Capture** window *(continued)*

Icon	Description
	**Draw Rectangle**
	**Open File**
	**Pan Image** Lets you move the image around within the **Screen Capture** window.
	**Paste** Lets you paste the contents of your Clipboard into the image. Use this option with the **Copy to Clipboard** option.
	**Redo** This icon is available only after you undo a change in the captured image.
	**Save to File**
	**Send to Process Manager**
	**Undo** This icon is available only after you make a change in the captured image.

Holding discussions in the ServiceDesk portal

This chapter includes the following topics:

About discussions in the ServiceDesk portal

You can participate in discussions with other users within the ServiceDesk portal. Use the discussion feature to communicate with others in an open forum environment. Users can post comments and messages to offer insight or answer questions.

Discussions can be created from the **Discussions** page in the ServiceDesk portal. For example, a support technician can start a discussion thread about an incident to get information and feedback on resolving the incident from other technicians.

See "Adding a discussion in the ServiceDesk portal" on page 58.

See "Discussions page" on page 13.

Discussions can also be created from a problem ticket. When a user creates a new problem ticket, a new discussion is created. The name and description of the problem ticket become the title and description of the new discussion. The problem ticket's process ID is added to the discussion title. Problem workers can access the discussion from the problem's **Process View** page. A problem-related discussion can be a valuable tool for finding a resolution to the problem.

A discussion is displayed as a hierarchy of information, as follows:

Discussion	The highest level in the hierarchy. Typically, a discussion encompasses a single subject or problem.
Thread	A subtopic of a discussion. You can use threads to better organize the **Discussions** page.
Post	A subtopic of a thread or of another post. You can create a new post for a thread, or you can reply to an existing post. Replies become the children of the original post. A single post can have multiple layers of replies.

Permissions can be set at the discussion level. The permissions determine who can create, edit, view, and participate in a discussion.

The participants in a discussion can rate the discussion's posts. The participant ratings are accumulated and displayed on the **Discussions** page.

The discussion ratings are as follows:

- Poor(1)
- Average(2)
- Good(3)
- Very Good(4)
- Excellent(5)

Adding a discussion in the ServiceDesk portal

A discussion is the highest level in the discussion hierarchy. You can create a discussion in the ServiceDesk portal.

Typically, a discussion encompasses a single subject or problem.

Discussions can also be added through the Product Management process.

To add a discussion

1. In the ServiceDesk portal, click **Knowledge Base > Discussions**.
2. On the **Discussions** page, click **Add Discussion**.
3. On the **Add Discussions** dialog box, click the **Discussion Information** tab and provide a title and a description for the discussion.

   This information identifies the discussion on the **Discussions** page.

4 (Optional) To enable email notifications of the events that occur on this discussion, click the **Notifications** tab, and then verify that **Process Notifications** is selected.

5 In the **Add Discussions** dialog box, click the **Permissions** tab, and then specify the permissions for one or more users, groups, permissions, or organizational units.

6 When you finish defining the discussion, on the **Add Discussions** page, click **Save**.

Adding a thread to a discussion

A thread is a subtopic of a discussion. You can use threads to better organize the **Discussions** page.

See “About discussions in the ServiceDesk portal” on page 57.

Users cannot post messages at the discussion level. Instead, they can post to threads.

See “Participating in a discussion in the ServiceDesk portal” on page 59.

To add a thread to a discussion

1 In the ServiceDesk portal, click **Knowledge Base > Discussions**.

2 If the discussion does not appear in the list, in **Search**, type the text to search for, and then click the **Search** symbol.

3 At the right of the discussion’s header bar, click the **Add Thread** symbol (a white page with a green plus sign).

4 In the **Add Thread** dialog box, on the **Thread Information** tab, type the title and the body text for the thread.

5 (Optional) In the **Add Thread** dialog box, on the **Thread Description** tab, type a description to further identify the thread.

6 When you finish defining the thread, click **Save**.

Participating in a discussion in the ServiceDesk portal

You can participate in discussions with other users within the ServiceDesk portal. Use the discussion feature to communicate with others in an open forum environment.

When you participate in a discussion, you can add threads, add posts, and reply to existing posts. Your ServiceDesk permissions determine which discussions you can edit, view, and participate in.

See "About discussions in the ServiceDesk portal" on page 57.

To participate in a discussion in the ServiceDesk portal

1 In the ServiceDesk portal, access the discussion in any of the following ways:

From the portal	Click **Knowledge Base > Discussions**. If the discussion does not appear in the list, in **Search**, type the text to search for, and then click the **Search** symbol.
From a problem ticket	On the problem's **Process View** page, under **Smart Tasks**, click **Go to Discussion**.

2 Expand the discussion section to view the posting history.

3 If a series of five stars appears under the post's text, you can rate the post by selecting one of the stars.

The first star is the lowest rating, and the last star is the highest rating.

The stars do not appear for the posts that you created.

4 If you plan to post any information that is not related to the discussion's existing threads, create a new thread.

See "Adding a thread to a discussion" on page 59.

5 You can add to the existing discussion in the following ways:

Post to a thread.	At the right of the thread's title bar, click the **Add Post** symbol (a white page with a green plus sign). In the **Add Post** dialog box, type and post the message text.
Reply to a post.	At the right of the post's title bar, click the **Reply** symbol (a white text balloon). In the **Reply** dialog box, type and save a reply to the selected post.

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