

# ManageEngine ServiceDesk

Support Technician Quick Reference Guide ServiceDesk Quick Reference Guide

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### ServiceDesk Quick Reference Guide

ManageEngine ServiceDesk Plus is a fast, easy way for users to request and receive help with almost anything they need. From system or software problems, to billing or credentialing issues, this user-friendly ticketing system offers the ability to create a variety of pre-filled templates that help users quickly submit a help desk request in just a few clicks. ServiceDesk goes beyond offering an efficient way to ask for help - it also provides users with a searchable knowledge database that lets them find answers to more common issues.



Access ServiceDesk by going to <u>http://servicedesk</u>. Enter your Windows login credentials into the Username and Password fields and click the **Login** button.

**NOTE:** Any time you change your Windows password, you will need to enter that new password here as well.

When you log in you will be taken to your ServiceDesk Home page. The Home page provides you with a brief overview of your current service requests and tasks, as well as a way to view any announcements your team has posted.



#### **Home Page Overview**

The Home page shows you a summary of your current requests and tasks, as well as any announcements that have been published.

Incident Catalog       Quick Actions       ADManager Plus       Advanced Analytics         My View       Scheduler	AD Self Service Zoho Creator App Q - Typ	The buttons and search bar in the top ribbon are available on every tab in ServiceDesk.
My Summary 1 Requests Overdue	O O My Tasks O Assign comput O Create Dentrix	ter (N/A) acccoun (N/A)
Requests Due Today	A Dentrix acco     Computer has     A Dentrix acco     A Dentrix acco     A Dentrix acco     A Dentrix acco	unt has (Nov 10, 2017 12:12 PM) been requ (Nov 10, 2017 12:17 PM) unt has (Nov 10, 2017 12:17 PM) unt has (Nov 10, 2017 12:33 PM)
Pending Requests	5 + Add New	> Show All
Section 2017	No announcement exists in the system.	Show All Add New

- 1. The **My Summary** section gives you a quick overview of how many requests you have that are overdue, coming due today, and pending.
- 2. The **My Tasks** section shows any tasks assigned to you. Open the task by clicking its description. You can add a new task by selecting the **+ Add New** button.
- 3. The **Dashboard** tab takes you to a dashboard that displays various snapshots of data from your team's requests.
- 4. The **Requests** tab lists all the requests assigned to your team.

- 5. The **Solutions** tab is the searchable knowledge database .
- 6. The **Profile** button lets you change your password.

#### **General Navigation Tip**

The buttons and search bar in the ribbon at the top of the page are displayed throughout ServiceDesk, regardless of your location.

#### **Dashboard Page Overview**

The Dashboard page displays various widgets that give you snapshots of data regarding the requests for your group. These report widgets are displayed in different ways, depending on the data being summarized.

	Requests Soluti	ons Admin <u>III</u>	0		9 🔈
9 Incident Catalog 👻 Quick Actions	ADManager Plus	Advanced Analytics	AD Self Service	Zoho Creator App Q Type here to search	Product Overview 🖋
Requests by Technician			Technician	All Site Request Summary	ees → 🔹 Support Groups → 🕐 → 🖽 New → Ξ
Raymond Men	Open 73	On Hold 0	OverDue	30 24 <u>22</u>	<u></u>
Braxton Dor Alan Strawi	58 51	0	58 52	18 18 21 12 14	14 14 13
Mike Klos Gerald Conn Others	42 20 37	0	2 <sup>42</sup> 19 32		
Unassigned Total	541 822	0	468 <b>743</b>		Wed Thu Fri Sat
View All					
Task Summary				Open Requests By Priority	Priority v
			Pending Tasks		
Paul Austin			9	Normal=623	
Gerald Conner			1	-	
			54	-	
Total			65	-	Not Assigned=4 High=29 Low=37

- 1. Some of the widgets have drop-down menus to let you sort and change your views.
- 2. Some of the data in the widgets are hyplerlinks you can click to be taken directly to that specific piece of information. You can see this by hovering your mouse over the numbers or results, or by looking for colored text such as red or blue.
- 3. You can filter the data the widgets display using the drop-down menus. These let you select specific sites and support groups (Dentrix, PV, etc.).



#### ServiceDesk Quick Reference Guide

#### **Solutions Page Overview**

The Solutions page is a searchable knowledge database where you can look for answers to common questions or problems. Using this feature lets you to see resolutions to common issues others have experienced. You can also add new solutions from this page.

DENTAL         A         C         Requests         Solutions         Int         O <th>٩</th>								٩			
Incident Catalog  Quick Actions  AD Self Service Zoho Creator App Q Type here to search											
Topics [Expand All]		Q S	earch i	n All s	Solut	tions	All Solutions View Solution Actions View 1 - 25 of 31 < > 25 + per page				
General Hardware	C					D	Title &	Views	Created On	Created By	۹ 🛱
Marketing Network Software		(		6	3	35	90 - Avon Center down Topic : Internet Office is back online after power cycling their Motorola router	0	Nov 7, 2017 11:10 AM	Raymond Men	ıdoza
				6	) 3	32	Adding a DMO Library to the Reporting Portal Topic : Sharepoint Use these instructions when adding a new DMO library to the DentalBytes Reporting Portal	1	Oct 27, 2017 04:44 PM	Ed Holmsen	
				0	) 2	26	Adding a Facilities Development checklist for a De Topic : Sharepoint Follow these instructions to create a new checklist within the Facilities Development site and set up the quick link in the left-hand menu.	12	Apr 13, 2017 03:55 PM	Ed Holmsen	
				6	) 3	34	Adding Links as a Document Type in Sharepoint Topic : Sharepoint Instructions on how to set up a URL as a document type in a Sharepoint list or library	1	Oct 27, 2017 04:49 PM	Ed Holmsen	
		(		) (	1	9	Cannot fax Adobe .pdf with RightFax Topic : Rightfax When sending a fax from MS Word it works, but when doing the same for a .pdf the RightFax phone number screen does not appear. Open Adobe Reader, select Edit – Preferences.On the options screen, select Security (Enhanced) from the list.To the right of that, remove the check mark from the box next to 'Enable protected mode at startup'.Click OK to close the options window, then restart Adobe Reader.	5	Nov 29, 2016 10:49 AM	Ed Holmsen	
		(		0	) 2	24	Connecting to the R: Drive Topic : General Iterations are the R: this if it as the second statement of	0	Mar 28, 2017 04:38 PM	Ed Holmsen	

- 1. The **Topics** section is an expandable tree that lets you drill down and search the help articles by category. Simply click the name of a category to expand its list of sub-category choices.
- 2. The **Search bar** lets you search for articles by entering key words or ID numbers.

	Q billing
Click the magnifying glass to	✓ Entire Content
open a drop-down menu that lets	Title
you narrow your search by title,	Description
description, topic, or key words.	Торіс
	Keywords

- 3. If you have a resolution you would like to submit to the knowledge base for others to see, click the **New Solution** button to create your submission.
- 4. Open an article by clicking its blue Title.

### **Reports Page Overview**

The Reports page (graph icon) lets you choose from an existing list of reports, or create custom reports to pull information you wish to see about your team's requests.

Requests Solutions 🔟 G								
🕑 Incident Catalog 👻 Quick Act	Incident Catalog  Quick Actions  AD Self Service Zoho Creator App Q Type here to search							
Report Folders 1	:: All Reports							
Manage Folders     Manage Folders     Reports by all requests     Reports by completed requests	Reports by all requests     ssues, when reports that return huge number of records, are executed. To ensure application stability, we have restricted reports to return     a maximum of 30000 records only     a maximum of 5000 records when request description / resolution columns are selected							
<u>Reports by SLA Violated requests</u> <u>Reports by pending requests</u> <u>Request Summary Reports</u>	A     6       New Custom Report             Flash Report             New Schedule Report             Advanced Analytics     ?							
Request Timespent Reports	1 Reports by all requests							
<ul> <li>Survey Reports</li> <li>Depreciation</li> </ul>	Reports							
	Requests by Group							
Actions	E Reports by all requests	$\odot$						
New Custom Report	Reports by completed requests							
New Schedule Report	Completed requests by Category	3 Edit						
	Completed requests by Group	Edit						
	Completed requests by Department	Edit						
	The Completed requests by Due Date	Edit						

- 1. The **Report Folders** section correlates with the main reports list in the middle of the page. You can click these folders to view reports related by similar categories. Click the boxes next to the report titles in the main list to expand the categories.
- 2. To view a report, click its title to open it.
- 3. Click the **Edit** link to the far-right of any report to modify its parameters and the information it displays

- 4. Click **New Custom Report** button to create your own report.
- 5. You can schedule reports to automatically run according to the timeline you choose by clicking **New Schedule Report**.

## **Reports Page Overview**

The actual reports display information in different ways, depending on the type of report. Typically a graph will be shown at the top of the report, with the details shown below it. You can also export the report or print it.

	Requests       Solutions       Admin       Lt.         ions       ADManager Plus       Advanced Analytics         Report Home > Reports by all requests > Request         Requests by Due Date       Edit         •       Page 1 of 4       •         Requests by Due Date       Edit         •       Page 1 of 4       •         •       Page 1 of 4       •         •       Cenerated by Laure Presnell on : Dec 18, 2017 11:         Total records : 95       Dueby Time : From Dec 17, 2017 12:00 AM To Dec	AD Self Service Zoho Creato ts by Due Date Save report as Schedule	App Q - Type here to search. App An Antipathies App Antipathies Antipathi	Add to Dashboard Cancel	₽     ►       Product Overview     ✓       ▷     PDF file       ■     XLS file       ■     CSV file       ■     DentalOne Partners, Inc.	1. 2.	Reports typically display a chart or graph at the top of the report page. The details of the report results are listed below the chart or graph.
New Schedule Report	1		2017 Request Status Closed + Open + Onhold	10 2 21.0+c-2017 22.0+c-20	1	3. 4. 5.	You can print or export the report in the row at the top or bottom of the report. Click the <b>Mail This Report</b> button to email the report to someone. You can add the report to your dashboard by clicking <b>Add to Dashboard.</b>
	Request ID Request Mode	Requester	Category	Level	Request Status		
	Dec 18, 2017						
	6126 E-Mail	0021 - Pewaukee Manager	User Administration	Not Assigned			
	6127 E Mail	0021 - Pewaukee Manager	User Administration	Not Assigned	Open		
	6024 E-Mail	0151	User Administration	Not Assigned	Open		
		- Fort Mill Manager	out vanimatigoon	not roaly neu	open.		
	6130 E-Mail	0202 - Louisville Cedar Springs	Dentrix	Not Assigned	Open		
	6025 E-Mail	Ed Holmsen	Software	Not Assigned	Closed		
	6026 E-Mail	Laurie Presnell	email	Not Assigned	Open		
	6027 E-Mail	Ed Holmsen	Software	Not Assigned	Closed		
	5953 E-Mail	0055 - Stow Manager	General	Not Assigned	Closed		
	© € Page 1 of 4 ⊕ ⊛	3	🖬 Graph View 🖨 Print Prev	iew Export as : 👂 HTML File	🖄 PDF file 🖹 XLS file 🖹 CSV file		