CA Service Desk Manager (SDM) r12.6
SDM Basic Navigation and Functionality

Analyst Training
Last Updated:
February 4, 2013

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DOCUMENT HISTORY

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<td>Version 1.0</td>
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<tr>
<td>Version 2.0</td>
<td></td>
<td>6-9-10</td>
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<td>Version 3.0</td>
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About this Course
Welcome to the CA Service Desk Manager (SDM) Analyst training. This course was designed for customer service analysts and will describe the functions required to perform the role of an analyst working with the Service Desk product.

Course Details
This course has no prerequisites and will cover the following subject areas:

- Navigation of the Service Desk Interface
- Updating Tickets with Activity such as Ticket Status, Logging Comments, Logging a Callback
- Transferring a Ticket
- Closing and Reopening a Ticket
- Creating a New Ticket
- Using Manual Notification
- Adding an Attachment
- Searching for Tickets
- Exploring the Knowledge Tool including:
  - Navigating the Knowledge Tool Interface
  - Browsing the Knowledge Tool
  - Adding and Removing Bookmarks
  - Logging a Solution into a Ticket

Instructor Led Course
This course is presented in a computer lab with an instructor. The instructor presents the information by completing the examples in each chapter on the screen. The students in the class follow by doing the same steps as the instructor. At the end of specific chapters, the students will complete an exercise.

How To’s and Tips
Demonstrations and documents explaining various Service Desk features can be found at:
https://apps.uillinois.edu/ServiceDesk.html
Chapter 1: Service Desk Interface

Accessing Service Desk Training Environment

To access the Service Desk Training Environment for this course:

1. Open an Internet Explorer browser window.
3. Type in the username and password located for you at your station.

The Service Desk training interface will open. If you are inactive in the system for 60 minutes, you will be logged off the system and will need to login again.

Tip: The Service Desk system is fully compatible with Internet Explorer and Mozilla Firefox.

Welcome Banner

This banner appears above the menus in the main window and provides login and system information, as well as the Log Out button that you may click to log you out of Service Desk.

Main Toolbar

The toolbar will be examined in more detail throughout the course in various chapters. It is also detailed in the handout provided to you in this training.

Scoreboard

The left pane of the Service Desk tab displays the Scoreboard, a tree-like structure that shows the requests, change orders, issues, call backs, and tasks assigned to you or your group (depending on how your department has configured your system). You can view your assigned and unassigned records by priority.
You can expand the list of records displayed in the Scoreboard by selecting the node for those records, or clicking the expansion button.

You can collapse the list of records displayed in the Scoreboard by selecting the node for those records, or clicking the collapse button.

Keyboard shortcut: When the focus is on the Scoreboard, you can use the up and down arrow keys to navigate through the nodes. You can expand and collapse the list of records displayed in the Scoreboard by pressing Enter on your keyboard.

Tip: To refresh the counts that are currently displayed in the Scoreboard, click the Update Counts button.

To view the tickets in your Group or those assigned to you:

1. Click the Update Counts button to ensure you have the most up to date ticket counts.
2. Expand the lists in the Scoreboard by selecting the node for those records, or clicking the expansion button.
3. Select the list you would like to view, for instance, My Requests.

This will now display all requests assigned to you.
4. Select the ticket you would like to view in the Request List Window.

A Ticket Detail Window will open in a new window.

Ticket Detail
Tickets will be examined in more detail throughout the course in various chapters. Details of a ticket include:

Exercise 1: Navigating the Scoreboard
Perform the following activities in the Scoreboard:

1. Click the **Update Counts** button to ensure you have the most up to date ticket counts.

2. Expand and collapse the lists in the Scoreboard by:
   a. Selecting the node for those records.
   b. Clicking the expansion and collapse button.
   c. On your keyboard, using the up and down arrow keys to navigate through the nodes, then expand and collapse the list of records displayed by pressing **Enter**.

3. Select the various lists in the Scoreboard to view in the List Windows, for instance, My Requests or Group Requests.
4. When you feel comfortable with the scoreboard, please open a ticket assigned to you under My Requests and wait for Chapter 2 to begin.

Chapter 2: Updating Tickets with Activity

Updating the Ticket Status

To change the status of a ticket:

1. View the ticket.
2. From the Ticket Detail window, select Activities, then Update Status.

A Status Change Request window will open.

3. Use the dropdown under New Status to choose from the list of provided statuses.
4. Click the Save button to save your changes and return to the ticket.

The activity is added to the Activities Tab.

Tip: You can also select the Edit button, then use the dropdown under New Status to choose from the list of provided statuses and click the Save button.

Updated Ticket Status by Manual Notification

By contacting an end user using Manual Notify (see Chapter 7), it allows end users to reply to the manual notification through the Service Desk tool. When a manual notification is sent, Service Desk updates the status automatically to “Awaiting Information”. Once an end user replies to that manual notification message, Service Desk references the ticket that needs to be updated, and updates the status automatically to “Client Updated”.

Logging Comments in Tickets

Logging comments will log text in the ticket and provides a way for you to include notes in the ticket. To log comments:
1. View the ticket.

2. From the Ticket Detail window, select **Activities**, then **Log Comment**.

   *A New Activity window will open.*

   ![Create New Activity for Request R1576450](image)

3. Type your information into the **User Descriptions** field.

4. Click the **Save** button to save your changes and return to the ticket.

   *The activity is added to the Activities Tab and the status is changed to “Work in Progress”.*

- **Tip:** There is a 4000-character limit for the ‘Log Comments’ field.

- **Tip:** If you would like to keep the comments you entered private from non-analysts, select the **Internal?** Checkbox.

**Logging a Callback**

You can record the event of a callback to an end-user within the ticket. To record this update:
1. View the ticket.

2. From the Ticket Detail window, select Activities, then Callback.

   *A New Activity window will open in a separate window.*

3. Change the **Date of Activity** field to the date the callback occurred by entering into the field or selecting the **Date of Activity** hyperlink to open a calendar to select a date and time.

4. Click **Save** to save your changes and return to the ticket.
   
   *The activity is added to the Activities Tab.*

   ☑ **Tip:** If you would like to keep the call back entered private from non-analysts, select the **Internal?** Checkbox. This will now show a sunglasses icon in the Activities tab to denote the callback is private.

   ☑ **Tip:** Callbacks scheduled for a future time will show up in your scoreboard and are visible to you and your group(s).

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**Exercise 2: Including Activity in Tickets**

Perform the following activities in the ticket you have opened from your queue:

1. Change the **status** of the ticket to **Awaiting Information**.

2. Log a **comment** into the ticket that states you attempted to contact the user and were unsuccessful.
3. Record the planned event of a **callback** to an end-user within the ticket for tomorrow at 2pm. Make this activity private from non-analysts.

4. If there is time remaining, you may change and add additional activity for practice.

### Chapter 3: Transferring a Ticket

You are able to transfer a ticket to another Group to resolve. To transfer a ticket:

1. View the ticket.

2. From the Ticket Detail window, select **Activities**, then **Transfer**.

3. Remove the group listed in the **Group** box.

4. Click the hyperlink for the **New Group** field to search for a new group.

   A **Transfer Request window will open in a separate window.**

5. Select the group’s hyperlink in the **Name** column.

6. Click the **Save** button to return to the ticket.

   *The activity is added to the **Activities Tab**.*
Chapter 4: Closing and Reopening a Ticket

Closing a Ticket
When you have completed resolution of the issue, you may now close the ticket. To close a ticket:

1. View the ticket.
2. From the Ticket Detail window, select Activities, then Update Status.
   
   *A Status Change Request window will open.*
3. Use the dropdown under New Status to choose Closed from the list of provided statuses.
4. Enter the steps taken to resolve the issue in the User Description field.
5. Click Save to save your changes and return to the ticket.

*The activity is added to the Activities Tab.*

✔️ Tip: You can also select Edit, then use the dropdown under New Status to choose Closed from the list of provided statuses and click Save.

Reopening a Ticket
To reopen a ticket:

1. Search for the ticket you would like to reopen using the Quick Record Search. (See Chapter 8)
2. View the ticket.

3. From the Ticket Detail window, select **Activities**, then **Update Status**.
   
   *A Status Change Request window will open.*

4. Use the dropdown under **New Status** to choose a status of **In Progress** from the list of provided statuses.

5. Enter the reason for reopening the ticket in the **User Description** field.

6. Click **Save** to save your changes and return to the ticket.
   
   *The activity is added to the Activities Tab.*

   [Tip: You can also select **Edit**, then use the dropdown under **New Status** to choose from the list of provided statuses and click **Save**.]

**Exercise 4: Closing Tickets**

Perform the following activities in the ticket you have opened from your queue:

1. Update the **status** of the ticket to **Closed**.

2. Log a **comment** into the User Description field that states you have resolved the issue stated in the ticket.

3. Save the changes and close the window.
Chapter 5: Creating a New Ticket

Quick Profile

The Quick Profile provides a centralized area to view detailed information about contacts and organizations that make up your enterprise. To begin the creation of a ticket:

1. In the Service Desk tab, from the Main Menu, select View, then Quick Profile from the main toolbar.

   A Quick Profile window will open in a new window.

   The Quick Profile is divided into three panes. The left pane displays target contact information as well as contact historical information. The right pane acts as a list area, displaying different types of data depending on your latest selection. The bottom pane shows the Scratchpad area, allowing you to add additional information to the ticket profiled.

2. Type a contact name into the Last Name or First Name fields; it is acceptable and recommended that you enter partial information to receive a list of available records that match your request.

3. Click the Search button.

   The available records that match your request will be populated in the window.
4. Click on the hypertext to select the correct contact.

   **Keyboard shortcut:** In the Quick Profile, you can enter partial data directly into the fields and press Enter on your keyboard to populate search results. If these results don’t meet your needs, click the Show Filter button to refine your search.

5. Verify that the information for the contact is correct. If it is not, Click **Edit This Contact** to edit the contact and replace information. You must click the **Save** button after editing any contact to record the changes.

   ✓ **Tip:** This will only change the information in Service Desk; if a user changes their information in Banner, this will override the Service Desk data.
To view any recent activity that a contact has performed, you can click the **Recent Activity** button. This will display what the contact has searched for and what results they found or viewed.

**Scratchpad**

As the contact begins to explain their issue and you determine the classification of the ticket, add information about the issue into the **Scratchpad**. To enter information into the **Scratchpad**:  

1. Click within the **Scratchpad** box to highlight.
2. Type in the details of the issue into the **Scratchpad**.
3. Determine and select the **Type** of ticket from the dropdown.
4. Click the **New** button to create a new ticket.

* A new ticket will open in a separate window.*
Request Area and Incident Area

As a requirement, all Requests and Incidents must have an Affected End User (this is populated when using the Quick Profile) and a Request Area or Incident Area. To select a Request Area or Incident Area:

1. Select the Request Area or Incident Area hyperlink.

   A Request Area or Incident Area list will open in a separate window.

   The list is built as a hierarchy as each high level allows users to drill down to more appropriate areas based on their campus affiliation and role (e.g. Student, Faculty, Analyst). To get additional information about an Area, you can hover over the drilled down Area hyperlink to reveal and select the View Detail button. All Areas will have a previously determined default group behind them where the ticket will be sent.

2. Once you identify the area best suited to define the issue, click on the hyperlink associated to the Area.
The **Group** field is now populated based on the **Request Area** or **Incident Area** selected. The **Assignee** field is populated with the person reporting the issue. The **Description** field is populated with the Scratchpad information.

3. Type a short description into the **Summary** field. This field acts as the title to the ticket and is what is used when looking at a list of tickets from searches or reports.

   ✅ **Tip:** There is a 60-character limit for the **Description** field.

---

**Summary Information**

- **Summary**
- **Spelling**
- **Error in BusinessObjects**
- **Description**
  - **Spelling**
  - **Search Knowledge**

**User is calling in to report an issue with BusinessObjects software**

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**Note:** **Configuration Item**, **Resolution Code**, **Resolution Method**, **Change**, **Caused by Change Order**, **External System Ticket** and **Apparent Root Cause** fields are utilized on a department-by-department basis.

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**Status, Priority, and Created By**

Modify the **Status**, **Requester**, **Priority**, and **Created By** fields using the drop downs if necessary.

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**Call Back Date and Time**

The **Call Back Date/Time** field is a way to provide a commitment to the Affected End User that you will reconnect with them at a later date after performing any additional online function or researching their issue. To populate the Call Back Date/Time field:

5. Click the **Call Back Date/Time** dropdown and either select a preset time or select the **Call Back Date/Time** hyperlink to open a calendar to select a date and time.
6. Click the **OK** button.

![Tip: Your callbacks for the day will be tracked in your **Scoreboard** to allow you to review and reconnect with End Users in a timely manner.](image)

**Saving the Ticket**

In order for the ticket to process in the system, you must **Save the ticket**. In order to save a ticket:

1. Click the **Save** button.

   *A yellow highlighted bar will appear confirming the save, the ticket creation, and will also display the ticket number.*

![Image of R1576457 Request Detail](image)

![Important: You must always Save the ticket each time changes are made to the information; otherwise, changes made will be lost. The tool has no additional warnings or pop-ups to alert users of the need to save.](image)

**Exercise 5: Creating a Ticket**

Perform the following activities:

1. Create a **new** ticket with the following parameters:
   
   a. **Affected End User:**
      
      - Enterprise ID: instructor01
      - Last Name: instructor01
      - First Name: instructor
   
   b. **Issue:** User needs to reset password
   
   c. **Status:** Open
   
   d. **Priority:** Normal
   
   e. **Created By:** Phone
   
   f. **Request Area:** SDM Training
g. **Assignee:** Populate the assignee with the training ID (e.g. train01) of an individual sitting next to you in the training course so that you and the partner will each get a new ticket in your queue.

2. After you have created the ticket, add one of the following activities:
   
   a. Log a comment
   
   b. Add a callback activity

3. Save the changes and close the window.

4. If there is time remaining, you may go to your queue(s) and view the new ticket assigned to you.

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**Chapter 6: Ticket Escalations**

**Manual Escalation**

You may need to escalate or transfer a ticket that has been outstanding for an extended period of time or demands an immediate response. Escalation can involve transferring a ticket to another analyst or group and/or increasing its priority. Escalating a ticket immediately transfers the ticket to the individual or group specified and the new analyst or group is automatically notified, as are any others who should receive notification based on the notification rules that your system administrator set up. To escalate a ticket:

1. View the ticket.

2. From the Ticket Detail window, select **Activities**, then **Escalate**.

   *An Escalate Request window will open.*

3. In this window, you can change the **Priority**, **Assignee**, or **Group**.

4. Click the **Save** button.

   *The activity is added to the Activities Tab.*
Predefined System Escalations

Each partition within the Service Desk tool has internal escalations that notify a chain of command by email when tickets have had no activity in a pre-determined period of time. This escalation process was determined by the Help Desk Steering Team (HDST) and is reviewed on a consistent basis for improvement.

Chapter 7: Using Manual Notification

It is possible to send emails from Service Desk directly to end users or others for communication while solving a ticket. All email communications from within Service Desk must go to a known contact record. To send a Manual Notification:

1. View the ticket.
2. From the Ticket Detail window, select Activities, then Manual Notify.

   A Manual Notification window will open.
3. The Affected End User will automatically populate. If you would like to add additional recipients, click the Add Recipient button to bring up a search window.

*A Search Contact window will open in a separate window.*

4. Type a contact name into the Last Name or First Name fields; it is acceptable and recommended that you enter partial information to receive a list of available records that match your request.

5. Click the Search button.

*The available records that match your request will be populated in the window.*

6. Click the >> button to move the contacts name to the right hand window.

7. Click the Add Contact(s) button to add the contact to the Manual Notification or click the Search button to find and add additional contacts.

*The recipient selected will show up in the Recipients field.*
8. The **Message Text** field is pre-formatted for your convenience with information from the ticket. If you would like, add your note to the **Message Text** field.

**IMPORTANT:** Do not change the variable at the end of the email (e.g. %REQUEST_ID=582). This is used to allow end users to reply to your email and is the only way that Service Desk references the ticket that needs to be updated.

9. Click the **Personalized Response** dropdown to select a preset response to add to the end of your Manual Notification.

   *If you have not set a Personalized Response, you will not see this option. To create a Personalized Response, please see the next section “Adding a Personalized Response”.

10. Click the **Notify** button to send the email to the end user(s).

   A successful Manual Notification will appear as Manual Notify in the **Activity Tab**.

![Activity Tab](image)

**Tip:** If you would like to send a manual notification to an outside Email address, type the Email address in the **Email Address** field.

### Adding a Personalized Response

You can now add your signature or text to the end of the manual notification. To create a personalized response:

1. From the Main Menu, select **File**, then **New Personalized Response**.

   *The Create New Personalized Response window will open in a separate window.*

![New Personalized Response Window](image)
2. Type in the name that you would like to call this personalized response in the Name field.

3. Type in the text that you want to be displayed as this personalized response.

4. When you are satisfied with the personalized response, click the Save button.

   *This response will now be visible in the drop down in the Manual Notification window.*

**Adding an Attachment**

Although it is not possible to add an attachment to a manual notification, you can add an attachment directly to the ticket and allow the user to log in online to view the attachment. The URL to log in is part of the pre-formatted out-going manual notification. To add an attachment:

1. View the ticket.

2. Click the Additional Information Tab.

3. Click the Attach Document button.

   *The Add File window will open in a separate window.*
4. Click the **Browse** button and locate the file *BO Error.jpg* on your desktop.

5. Type *BO Error* in the **Name** field.

6. Type in a description in the **Description** field.

7. Click the **Upload** button to attach the document.

   *The activity is added to the **Activities** Tab.*

**Tip:** The following file extensions are allowed: **doc, docx, xls, xlsx, txt, ppt, pptx, cfg, pdf, jpg, gif, png, bmp, tmp, rep.**

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**Chapter 8: Searching for Tickets**

To find an existing ticket or other item:

1. In the Service Desk tab, from the Ticket Detail window, select **Search**, then the ticket **Area** you are searching from the main toolbar.

   *A Request Search window will open.*
2. Fill in the field(s) that you want to use as search parameters.

   ➤ **Keyboard shortcut:** You can use the Tab key to move through the list.

3. Click the Search button.

   *A list of matching results will populate.*

4. Select the ticket or item that you want to view.

If you do not find what you need with this search, click the **Show Filter** button to bring the filter back or click the **Clear Filter** button to start over on the same type of search.

✔️ **Tip:** You can use the following search shortcuts to assist you in your search.

<table>
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<th>Search</th>
<th>Affect</th>
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<tr>
<td>Percent % or underscore _</td>
<td>Search for records without having to specify exact words or characters.</td>
</tr>
<tr>
<td>Search %a%</td>
<td>Retrieve list of records with field containing &quot;a&quot;</td>
</tr>
<tr>
<td>Search %a</td>
<td>Retrieve list of records with field where text ends with &quot;a&quot;</td>
</tr>
<tr>
<td>Search a%</td>
<td>Retrieve list of records with field where text starts with &quot;a&quot;</td>
</tr>
<tr>
<td>Search <em>a</em></td>
<td>Retrieve list of records with field where text has string of three characters long with the middle character of &quot;a&quot;</td>
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**Quick Record Search**

Above the menu bar users are offered a way to quickly search for and display the details of a specific record, for example, a request, incident, or knowledge. To search for a record, complete the following steps.

1. Select the record type from the drop-down list.
2. In the adjacent field, enter the record number or other identifying factor for the record you wish to view.

3. Click the Go button

*The record detail window will display.*

**Chapter 9: Exploring the Knowledge Tool**

Analysts have access to knowledge documents through the self-service interface located in Service Desk in the Knowledge Tab. Analysts can browse categories of documents and view documents by category, perform keyword searches of the knowledge tool, filter and sort documents, open and work with knowledge documents and knowledge tree documents, and bookmark documents to quickly find frequently referenced knowledge sources.

**Navigating the Knowledge Interface**

You can browse the Category pane, the left pane on the Knowledge Tab, to view the categories of knowledge documents. When you select a folder, all items in that folder display in the Knowledge Document List pane, from which you can select an item to view. You can view documents that you have bookmarked, documents that were recently created or viewed, or the most recent searches.

**Browsing the Knowledge Tool**

You can easily browse relevant Knowledge Documents in the Service Desk Tool. To browse documents:

1. Click the Knowledge tab above the Main Menu, next to the Service Desk tab.

   *This will open up the Knowledge Search with a simple highlighted field to perform a simple search.*

2. To perform a more in-depth search, click the Advanced Search button.
3. You can make the following adjustments to your search parameters:
   a. Unselect the **Search In:** checkboxes if those options are preferred.
   b. Modify the **Search Type** drop down if necessary.
   c. Modify the **Match Type** drop down if necessary.
   d. Modify the **Match** drop down if necessary.
   e. Modify the **Order by** drop down if necessary.
   f. Select the **Return only documents that solved tickets** checkbox if that option is preferred.
   g. Modify the **Category** field to narrow parameters if necessary by selecting the **Category** hyperlink and selecting the preferred category within the list. You can select multiple categories by repeating this step.

   *You can click the More icon to modify the following.*

   **Note:** The following fields are utilized on a department-by-department basis.

   h. Insert information into the **Owner** field by selecting the **Owner** hyperlink and performing a contact search.
   i. Insert information into the **Author** field by selecting the **Author** hyperlink and performing a contact search.
   j. Insert information into the **Subject Expert** field by selecting the **Subject Expert** hyperlink and performing a contact search.
   k. Modify the **Document Type** drop down if necessary.
   l. Modify the **Approval Process Priority** drop down if necessary.
   m. Insert information into the **Root Cause** field by selecting the **Root Cause** hyperlink and performing a Root Cause selection.
   n. Modify the **Priority** drop down if necessary.
   o. Modify the **Severity** drop down if necessary.
   p. Modify the **Impact** drop down if necessary.
   q. Modify the **Urgency** drop down if necessary.

   *You can click the More icon to modify the following.*

   r. Type information into the **Additional Search Arguments** field if necessary.
4. Click the **Search** button.

   *The search will return all relevant knowledge documents.*

5. Select a knowledge document to read by clicking on the hyperlinked **title** of the document.

   *The knowledge document will open in the window.*

6. To return to the list of documents, click the **Back to List** button.
7. To clear your search, click the **Reset Search** button.

**Adding and Removing Bookmarks**

You can bookmark frequently accessed knowledge documents. After a document has been bookmarked, it will be added to the Bookmark list. This list can help you to quickly locate documents that you frequently view. To bookmark a document:

1. Search for and open the document you are interested in bookmarking.
2. Select the **Add Bookmark** hyperlink in the shaded **Page Options** box in the top right corner of the Knowledge Pane window.

   *After you have added a document to a bookmark list, a **Remove Bookmark** button will appear in the Page Options box.*

To remove bookmarks from the list if you no longer frequently access these:

1. Select the **My Bookmarks** node in the Category Pane.
2. Select and open the document you are interested in removing from the list of bookmarked documents.
3. Select the **Remove Bookmark** hyperlink in the shaded **Page Options** box in the top right corner of the Knowledge Pane window.

**Logging a Solution into a Ticket**

You are able to log knowledge documents as solutions through using Knowledge Tools. To log a solution:

1. Click the **Knowledge Management** tab at the bottom of the ticket.

   *This will open up the Knowledge Search with the **Keywords for Advanced Search** field automatically populated with all the words that are currently in the ticket Description field.*
Tip: You can also search a solution in the Profile Browser by clicking the Search Knowledge button. This will open up the Knowledge Search in a separate window.

2. You can make the following adjustments to your search parameters:

   a. Modify the **Keywords for Advanced Search** field if necessary.
   
   b. Modify the **Search Type** drop downs if necessary.
   
   c. Modify the **Order by** drop down if necessary.
   
   d. Select the **Return only documents that solved tickets** checkbox if that option is preferred.
   
   e. Modify the **Category** field to narrow parameters if necessary by selecting the **Category** hyperlink and selecting the preferred category within the list. You can select multiple categories by repeating this step.

   You can click the **More** icon to modify the following.

   **Note**: The following fields are utilized on a department-by-department basis.

   f. Insert information into the **Owner** field by selecting the **Owner** hyperlink and performing a contact search.
   
   g. Insert information into the **Author** field by selecting the **Author** hyperlink and performing a contact search.
   
   h. Insert information into the **Subject Expert** field by selecting the **Subject Expert** hyperlink and performing a contact search.
   
   i. Modify the **Document Type** drop down if necessary.
j. Modify the Approval Process Priority drop down if necessary.

k. Insert information into the Root Cause field by selecting the Root Cause hyperlink and performing a Root Cause selection.

l. Modify the Priority drop down if necessary.

m. Modify the Severity drop down if necessary.

n. Modify the Impact drop down if necessary.

o. Modify the Urgency drop down if necessary.

You can click the More icon to modify the following.

p. Type information into the Additional Search Arguments field.

3. Click the Search button.

The search will return all relevant knowledge documents.

4. Select a knowledge document to read by clicking on the hyperlinked title of the document.

The knowledge document will open in a separate window.
5. When you find a knowledge document that solves the issue, select **Accept as Solution**.

   *This will log the knowledge document as a solution to the ticket. You will be able to view the solution in the Solutions tab in the Ticket Detail window.*

   *The activity is added to the Activities Tab.*

**Tip:** If you are unable to find a knowledge document to serve as a solution for your issue, you should identify your departments Knowledge Processes and Knowledgebase Manager to get a document added to the Knowledge Tool.

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**Exercise 5: Exploring the Knowledge Base**

Perform the following activities:

1. View a ticket located in your queue(s).

2. Click the **Knowledge** tab at the bottom of the ticket.

3. Perform a knowledge document search, utilizing the **Advanced Search** if needed.

4. When you find a knowledge document that solves the issue, select **Accept as Solution**.

5. Update the **status** of the ticket to **Closed**.
6. Log a **comment** into the User Description field that states you have resolved the issue stated in the ticket.

7. Save the changes and close the window.

**Appendix A: Requesting Access to Service Desk**

To gain access to Service Desk as an analyst, contact the AITS Service Desk:

You can call the AITS Service Desk at:

217-333-3102 (from Urbana-Champaign or Springfield) or 312-996-4806 (from Chicago)

You can also email the AITS Service Desk at: servicedeskaits@uillinois.edu

**Appendix B: Accessing Service Desk**

To access Service Desk:

1. Open a browser window.

2. Navigate to [http://support.uillinois.edu](http://support.uillinois.edu).
3. Type in your EnterpriseID and EnterpriseID Password.

   The Service Desk interface will open. If you are inactive in the system for 60 minutes, you will be logged off the system and will need to login again.

✓ Tip: The Service Desk system is fully compatible with Internet Explorer and Mozilla Firefox.

✓ Tip: If you know your NetID and NetID password, you may set up your EnterpriseID and EnterpriseID password here. You will be prompted to enter your NetID and NetID password, and then you will be presented a form that displays your EnterpriseID and asks you to set up your EnterpriseID password.

Appendix C: Service Desk Enhancements

In January of 2010, a survey was distributed to analysts to gather additional input about the way the Service Desk tool is currently used and how it could be further enhanced to meet client’s needs. This following specifically describes the four enhancements that will be live with the Service Desk Manager (SDM) upgrade. These have also been included in this training document.

Net ID Search

The Service Desk tool now has the ability to search by Net ID. This field is now located next to the Enterprise ID field.

Avenue of Ticket

The Service Desk tool now has an additional field, the Created By field, to record the avenue the issue was reported. Options include walk-in, phone, fax, chat, and email.

Signature Addition

The Service Desk tool now has the ability to add signatures to Manual Notifications. Instructions for this new feature are located in Chapter 7.

Status Field Drop-Down

The Service Desk Status field is now a drop-down field.

Client Response Email Notification

The Service Desk tool now provides an email notification to an Analyst when a ticket has been updated by the affected end user. This feature was added prior to the upgrade due to priority set by the Help Desk Steering Team (HDST).
Appendix D: Setting Your Preferences

To adjust your preferences for the Service Desk tab:

1. In the Service Desk tab, select View, then Preferences from the main menu.

2. Adjust your preferences as necessary and then click the Save button.

To adjust your preferences for the Knowledge tab:

1. In the Knowledge tab, select View, then Preferences from the main menu.
2. Adjust your preferences as necessary and then click the **Accept** button.

**Appendix E: On-Line Help**

Full training documentation including the most updated training manuals, tutorials, and detailed information on additional trainings can be found on the Service Desk Manager (SDM) website at [https://apps.uillinois.edu/ServiceDesk.html](https://apps.uillinois.edu/ServiceDesk.html).

**Appendix F: AITS Service Desk**

For further assistance, or to report problems, please contact the AITS Service Desk.

You can call the AITS Service Desk at:

217-333-3102 (from Urbana-Champaign or Springfield) or 312-996-4806 (from Chicago)

You can also report issues via email to the AITS Service Desk at: servicedeskaits@uillinois.edu