Learning Series

Volume 3: Service Requests
NOTICES

ServicePRO Learning Series

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# Table of Contents

*Submitting New Service Requests* ................................................................. 1

*Creating Service Requests from the Workbench* .......................................... 1

*Workspace* .................................................................................................... 2

  Service Request tabs ......................................................................................... 3

  Ribbon Toolbar .................................................................................................. 3

  Folder List .......................................................................................................... 8

  Workspace List .................................................................................................. 9

  Preview Pane ..................................................................................................... 9

*New Service Request Window* ........................................................................ 10

*End Users Submitting Service Requests via the Web Portal* ............................. 14

*End Users Submitting Service Requests via Email* .......................................... 16

  Updating Requests Submitted via Email .......................................................... 16
Submitting New Service Requests

Service requests are the foundation of Service Desk activity. When you have your queues and categories established, the service requests provide all the information required to monitor and report on the Service Desk.

Service requests can be submitted via three channels:

- End users submit requests via the Web Portal.
- End users email requests to the Help Desk.
- Support Reps submit requests on behalf of end users.

Creating Service Requests from the Workbench

Users are provided two options for creating New Service Requests from the Workbench:

1. **My Workspace icon** – This option will take you to the My Workspace window, where you can create and edit Service Requests.

2. **Service Request icon** – This option will take you directly to the New Service Request window.
Workspace

The **My Workspace** page displays a list of all open requests that are assigned to you, requests you are responsible for and requests for which you are the requester. If you have been assigned the “Data Analysis” role, you can view the workspaces of other Support Reps.

The Workspace window contains the following:

1. My Workspace and Service Requests tabs
2. Ribbon Toolbar
3. Folder List
4. Workspace List
5. Preview Pane

![Figure 1. Service Requests page](image)
Service Request tabs

ServicePRO provides you with many tools, sorted into tabs.

- **My Workspace** – Modify the service request listing
- **Service Requests** – Tools for creating and updating request

Ribbon Toolbar

Tab 1: My Workspace Ribbon

The Workspace toolbar will present several tabs with varying options to address requests that appear in this view.

Select

The Select Task Group will allow you to filter Service Requests shown in the Workspace.

Select – Folder

These requests can be in any one of the following statuses:

- **In Dispatch** – This section will display all requests with ‘In Dispatch’ status contained in dispatch folder to which you are assigned. This helps you view all requests that are In Dispatch so that you can assign them to specific queues to be worked on by Reps.

- **In Queue** – This section will display all requests with ‘In Queue’ status in queue folders to which you are assigned. When Support Reps are ready to work on a request, they should move that request into their “In Service” folder, so that only one Support Rep works on a request at any given time.

- **In Service** – If you are a Support Rep, this section will display a list of all requests for which you are currently responsible in your “In Service” folder. Requests that are ‘In Service’ will only appear in the workspace of the rep who is assigned.

Select – Status of Request

Filters for request statuses are also available from the Select task group.

- Active
- Suspended
- Scheduled
- Waiting for Response
Customize

This will open the Query Designer. Users of the ServicePRO interface can customize the grid in any of their request listings by clicking the "Customize" button. For each specific listing, a user can select which rows (fields) will be displayed in the grid. Also, they can display them in a different order, edit the captions, filter the field criteria, and more.
Preview Pane Task Group

This section allows you to select how you would like to view the Workspace List (grid) and the Workspace Detail.

![Preview Pane](image)

Figure 3. Preview Pane

You can select from the following:

- **Below** – View Workspace Detail below the Workspace List.
- **Right** – View the Workspace Detail in a panel to the right-hand side of the Workspace List.
- **Grid Only** – View only the Workspace List.
- **Recent Updates First** – View most recent updates of the request in the preview pane.
- **Chronological Order** – View updates to a request in the order in which they were inserted.

**Show**

In this section, a checkbox is available for showing or hiding **Requests in Subfolders**. If not checked off, then only requests from the current selected folder will be displayed.

![Requests in Subfolders](image)

Figure 4. Show Task Group

**Default Settings**

Set a default views for your Workspace upon opening the window.

- **Set Current View as Default** – Make a customized view the default view for the Workspace window.
- **Restore System Defaults** – Set the default view to the original system view.

![Default Settings](image)

Figure 5. Default Settings Task Group
Queue Folders

The following options are used for viewing and editing Queue Folders in the Workspace.

- **New Sub Folder** – Add a Sub Folder for the Queue Folder.
- **Properties** – View Queue Folder Properties
- **Find** – Search for Queue Folders in the listing
- **Rename** – Rename the selected folder
- **De-Activate** – Remove the Queue Folder from the listing

Figure 6. Queue Folders options
Tab 2: Service Requests Ribbon

When working in the Service Requests tab, the following options are available from the Ribbon Toolbar.

**New**

![Create New Item](image)

- **Create New Item** – Create Service Requests, Project Requests, Purchase Requests or Quick Requests from this menu

**Update Request**

![Update Request](image)

- **Memo** – Log a memo update in the selected request.
- **Attach File** – Add an attachment to the current selected request
- **Rating** – Rate the quality of a Service Rep’s response
- **Schedule Close** – Schedule a meeting or appointment and send an invitation or set begin work, due dates, reminders, recurrence, or simply close the request
- **Change** – Update request fields, such as the title or requester.
- **Social** – Send Email to the requester or send a Quick Message or Chat invitation to another support rep. You may also send Notifications.
- **Move To** – Place the request in your own Inbox, another Rep’s Inbox, Dispatch or in a Queue Folder
- **Assign** – Assign Work or Responsibility in a request to a User or Team
- **Project** – Create New Child Requests, add additional Folders, Merge requests together, Rearrange the Current Project or split a child request from its parent
- **Edit Memo** – Edit previous memo entries in the request list
- **Screen Sharing** – Initiate a Screen Sharing session and send an email invitation to the requester. For more details, view the section on [Screen Sharing](#).
Lookup/View

- **Activity Type** – Filter Activity Types visible in the Activity Stream, such as whether they contain Rules, Emails, Attachments, etc. This can be set for the current request, the current window or permanently.
- **Memo By** – Filter other users from the Activity Stream.
- **Request Details** – View details of a Service Request
- **Find** – Search for Suggested Solutions, or search the Request Database
- **Requester Details** – View properties of the Requester, or that of their Company or Organizational Unit.
- **Requester History** – View other requests logged by the Requester, or all requests logged by users in their Company or Organizational Unit.
- **Contact History** – View all memo updates in requests logged by the Requester, or all memo updates in requests logged by users in their Company or Organizational Unit.

Folder List

View all the queue folders to which the Support Rep is assigned.
Workspace List

This section displays all the requests in the queue folder you selected from the Folder List that meet all the parameters set in the My Workspace task group.

<table>
<thead>
<tr>
<th>Ref #</th>
<th>Title</th>
<th>Time Logged</th>
<th>Priority</th>
<th>Requester</th>
</tr>
</thead>
<tbody>
<tr>
<td>10099</td>
<td>New iPhone needed</td>
<td>10/20/2014 3:30 PM</td>
<td>Undefined</td>
<td>Douglas Chow</td>
</tr>
<tr>
<td>10103</td>
<td>Need new laptop</td>
<td>10/20/2014 4:15 PM</td>
<td>Undefined</td>
<td>Abdul Sponder</td>
</tr>
<tr>
<td>10104</td>
<td>Server SV277 Needs to be Rebooted</td>
<td>5/27/2014 10:06 AM</td>
<td>Medium</td>
<td>Rick DaSilva</td>
</tr>
<tr>
<td>10085</td>
<td>Approval for Normal/Exception Change</td>
<td>5/27/2014 10:06 AM</td>
<td>Medium</td>
<td>Rick DaSilva</td>
</tr>
<tr>
<td>10077</td>
<td>Setup Mike Jones</td>
<td>5/28/2014 1:12 PM</td>
<td>Medium</td>
<td>Stacy Warner</td>
</tr>
<tr>
<td>10081</td>
<td>Create AD Account</td>
<td>6/2/2014 2:56 PM</td>
<td>Medium</td>
<td>Stacy Warner</td>
</tr>
<tr>
<td>10083</td>
<td>Add User to Payroll</td>
<td>6/3/2014 6:16 PM</td>
<td>Medium</td>
<td>Stacy Warner</td>
</tr>
<tr>
<td>10084</td>
<td>Setup BlackBerry</td>
<td>6/3/2014 3:56 PM</td>
<td>Medium</td>
<td>Stacy Warner</td>
</tr>
</tbody>
</table>

Figure 11. Workspace List

Preview Pane

View request details for the request highlighted in the Request list. View memo updates on the Activity Stream tab, or view the Properties tab for request properties.

Figure 12. Preview Pane
New Service Request Window

The ServicePRO Request Screen features the following task/information areas:

1. Tabs
2. Ribbon Toolbar
3. Title
4. General Information
5. Workflow
6. Notification
7. Schedule
8. Importance
9. Memo

Figure 7. Adding a Request for a Privileged User.
1. Tabs
Quickly switch between modules and request windows with tabs above the ribbon toolbar.

2. Ribbon Toolbar
When creating new requests, you have the following options:

- **Save** – click this option to submit or save updates to a service request.
- **Attach File** – add a document or file to this service request.
- **Schedule** – Schedule a meeting or appointment in your calendar and send an invitation to other users. You may also set a reminder for yourself or other Support Reps at a future time.
- **Quick Message** – Send a message to another support rep within ServicePRO. The quick message creates a conversation thread which then becomes part of the request activity stream. It’s a lightweight communication tool to allow exchange of information between the stakeholders such as requester, support rep and manager while still having all information logged for reference.
- **Screen Sharing** – Initiate a screen sharing session to remotely assist a user.
- **Find** – Use Best Solutions to search the knowledge base for an article to help resolve the current incident or problem. You may also search other requests with Request Database.
- **Requester Details** – View the properties of the requester, or their Company/Organizational Unit.

3. Title
- A brief description of the problem/task. The title is visible to all users. This field can assist technicians in obtaining relevant information quickly. It should be as descriptive as possible.

4. General Information

- **Request Type** – Select the desired request type. By default, this will be “Generic Service Request.” Based on the Help/Service Desk needs, you can create different request types. For example, incident request type, new employee onboarding request type, or change management request type using the Custom Object Designer.
- **Requester** – This field will default to the user logging the request. However, Users with the “Submit” Role can use the “Find the Requester form” to search for the name of the requester who requires service, and log the request on their behalf.
- **Category** – This required field is used to categorize the request using a drop-down list. Select the category that best fits the request.
- **Asset** – Associate an asset with the request. This is useful to track troublesome and expensive assets over time.
5. **Workflow**

- **Folder** – Select the queue folder where the request will reside. This can be either a dispatch or a generic queue folder.
- **Close** – This option allows you to indicate that work is completed and close the request.
- **First Call Resolution** – Indicates that a service request was resolved during first contact
- **Assign Work** – Assign the request to a support rep or a team. This indicates that the request is being worked on, and hides it from the workspace of other reps.
- **Responsibility** – this field allows you choose the individual that is responsible for this request, such as a manager or supervisor.

6. **Notification**

- **Notification Type** – Send the Current Memo or Entire History as an Email Update, or send nothing with Disabled.
- **From** – this field allows you to set the System Email Account that an Email Update is sent from.
- **CC Recipients** – this field lists current CC recipients for the Email Update. You may also specify additional CC recipients.

7. **Schedule**

- **Begin Work** – This field provides four scheduling options:
  
  - **ASAP** - Work needs to begin as soon as possible.
  - **Schedule** - Work is scheduled to begin at a future date and time.
  - **Suspend** - No work is required at this time; however, the request cannot be closed.
  - **Waiting for Response** - More information is needed from the requester. When the requester updates the request, the request will resume and you will receive an alert.

- **Due By** – Use this field to set a deadline for request completion. The value for this field can be “ASAP,” or a specific date and time. For example, if you have new employees starting next Monday, you could schedule the “Due By” date for Friday so an alert will notify you to set up workstations for them or complete other preparatory work on Friday.
8. Importance

- **Urgency** – Select from four levels of urgency (Critical, High, Medium and Low). Urgency – defined by the end users – indicates to Support Reps how users view the importance of an issue.

- **Priority** – Select from four levels of priority (Critical, High, Medium, and Low). Priority is normally set by a Dispatcher or a Support Rep submitting the request. This is the field ServicePRO uses to prioritize workflow.

9. Memo

- **Time Worked** – Time accumulates while the *New Request* window is open. When solving a problem over the phone, or when Support Reps leave their desks to work on a request, the timer automatically tracks time spent. Update the request when the work is complete. ServicePRO lets you manually override elapsed time by directly entering a date and time in the **Time Worked** field. You can specify the time worked and select a different date if necessary.

- **Time Code** – Associated with each Support Rep’s hourly rate, the time code indicates whether the charge for the request is a standard, overtime rate or any other type of rate that is set in the system for tracking hourly charge rates per support rep.

- **Private Memo** – When this box is checked, the memo is not visible to anyone but those with Support Rep or Request View – All Transactions role in that queue. This can be used to hide sensitive or confidential information from end users. Private memos are not visible on the End-Users and are not emailed, even if Email Current Memo has been selected.

- **Memo** – Use this area to provide a complete description of the problem, details of the work carried out by Support Reps, and specifics about the problem resolution. It is extremely important that Support Reps update requests with the eventual problem resolutions. This helps build an historical knowledge base that can be easily searched by end users, thus enhancing self-help. Memo templates can be used by clicking the **Memo Templates** Icon on the ribbon tool bar of the memo section.

- **Rich Text Editor** – Text added in the Memo field of a request can be formatted using the Rich Text Editor. It provides users the ability to alter the size, font style and color of text used in inserted memos. Also, images and tables can be inserted directly into the memo field of a request.

10. Submitting New Service Requests

To submit a request, complete the following process:

1. From the *Service Requests* page, click the *Request* icon in the *New* task group of the toolbar.
2. Enter data in the fields as described above.
3. When all information has been entered, click the *Save* icon in the *Ribbon Toolbar*.
4. ServicePRO displays a confirmation dialog box that says: “*Your Request has been logged as reference number ####*”.

The request is sent to the queue, Support Rep, or Dispatcher as selected.
End Users Submitting Service Requests via the Web Portal

End users can submit service requests over the Internet using ServicePRO’s End User Portal.

When end users log in to ServicePRO End User Portal, they see a different user interface. The interface they see looks similar to the one shown in the figure below.

![End User Portal Home Tab](image)

**Figure 13. End user Web Portal – Home Tab.**

1. To log a service request using the Web Portal, launch your browser from any computer.
2. Navigate to the URL set up by your company, where you will find the Web Portal login screen.
3. Log in to the ServicePRO Web Portal; enter the End User name, password, and select a language.
4. Click **Login**. (End user can skip this step if ServicePRO is configured to use Windows authentication).
5. To log a service request, simply click on the **New Service Request** icon. A pop-up appears where you can select **New Service Request** or **New Purchase Request**.
6. By default, the **New Service Request** radio button is selected.
7. From the drop-down in the pop-up, you must also select the Request Type, such as an Incident. A page similar to the one shown below appears.

![Image](image_url)

Figure 14. End User Web Portal – New Request Tab.

8. In this example, you would select a value from the Category drop-down list, enter a name in the Request Title field, and enter other pertinent information in the Memo field.

9. You could also modify the value in the Urgency field if needed. (The availability of these fields can be customized by system administrator from System Options feature of ServicePRO application)

10. You can attach files to your request by clicking on the Attach icon.

11. You can schedule a reminder for yourself by clicking on the Reminder icon.

12. You can also select a different custom request type (if any have been created) by clicking on the Request Type drop-down list (currently showing “Incident Request”).

13. Click the Save button at the bottom of the window or the Save icon to submit your request.

14. A dialog box appears to confirm that your request has been logged under a Request Number.
End Users Submitting Service Requests via Email

End users can email a request to the Service Desk. For ServicePRO to process email and convert them into service requests, the administrator must have set up a system email account. Only emails sent to the configured system email accounts will be processed by ServicePRO. For example, your email account could be support@mycompany.com.

ServicePRO scans each incoming email to determine the sender’s email address then scans the database to match the email address with a user record. When an email is sent to your Service Desk’s email address, the following occurs:

- Each new request is automatically logged in ServicePRO and placed in Dispatch folder or any other folder if you have Business Rule created to auto-route the request.
- The email subject becomes the service request title.
- The email message becomes the service request memo.
- The requester receives an automatic response confirming receipt of the request and the reference number gets assigned.

Updating Requests Submitted via Email

To update their requests, users can simply reply to the automatic response received from ServicePRO. This ensures the update is attached to the proper request.

NOTE: When replying to email received from ServicePRO, user must not change the subject of the email otherwise the request will not be updated.