



# ADiTaaS: Automation Platform for the Digital Era

# ADiTaaS v5.1

## AGENT GUIDE

June 30, 2021

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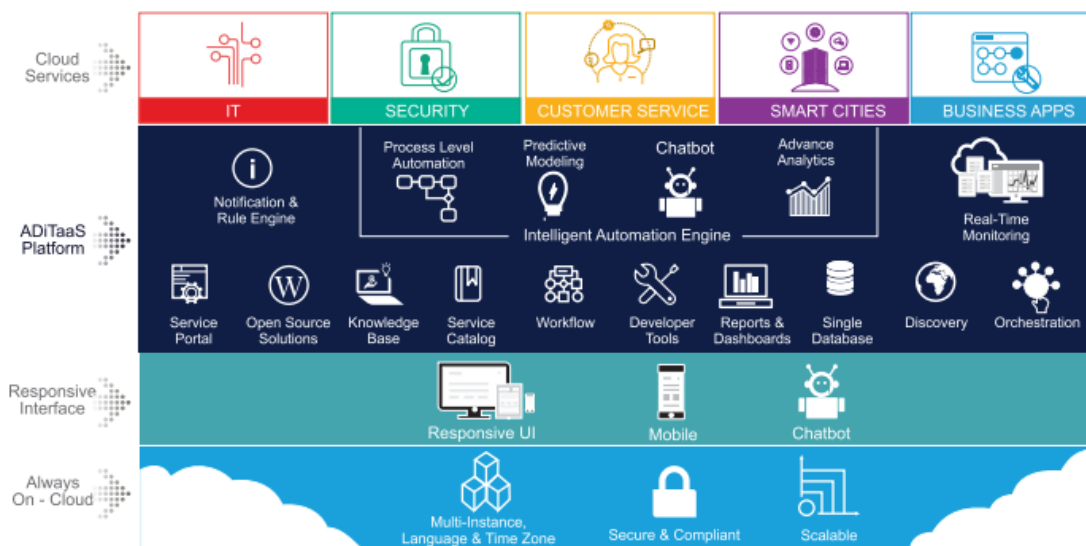
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## Overview

ADiTaaS (Allied Digital Integrated Tool-as-a-Service) is intuitive enterprise service management for the performance of the digital enterprise, on-premises or in the cloud. It provides end-to-end visibility of all services delivered by different business units, while automating processes on the powerful ADiTaaS platform. ADiTaaS is easy to configure and allows you to activate quickly, while scaling to your business needs. With a simple and consistent approach, you increase efficiency, lower costs, and devote more time to innovating and delivering the modern, consumer like, Self-service experience your employees expect.

## ADiTaaS Architecture Stack



## About This Manual

This user guide is intended for all agents, which describes how to use application to log and progress processes. The application keep a log of all activities and automatically emails status updates, allowing users to track the status of an incident ticket or a service request that has been submitted.

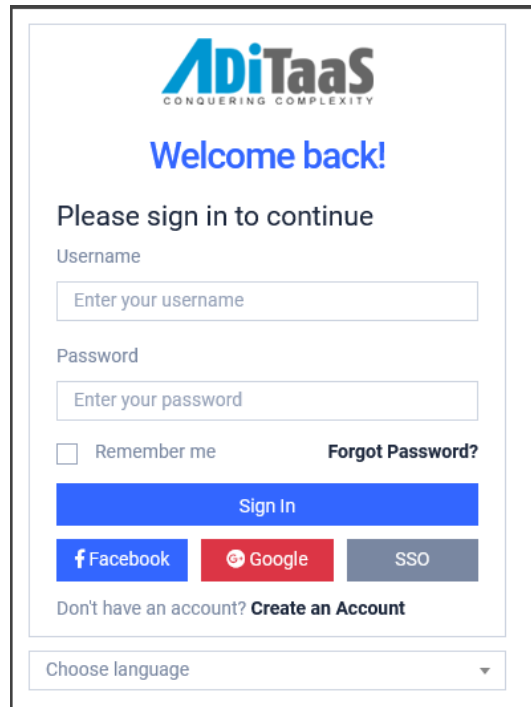
## Logging In

### DOMAIN ID:

Login in to ADiTaaS from any device using your domain ID account.

1. Open a web browser and enter the URL  
<https://demoaditaasv5.allieddigital.net/aditaasv5/>
2. On the ADiTaaS login page, enter your username and password in the corresponding fields and then click the 'Sign In' button.

3. The credentials will authenticate with Active Directory and if got success it redirects to the home page of ADiTaaS



#### FACEBOOK:

Enter Facebook credentials to login application.

#### GOOGLE:

Click on Google icon and enter Google credentials to login.

#### SSO:

Single sign-on (SSO) is a session and user authentication service that permits a user to use one set of login credentials (e.g., name and password) to access multiple applications.

#### CHOOSE LANGUAGES:

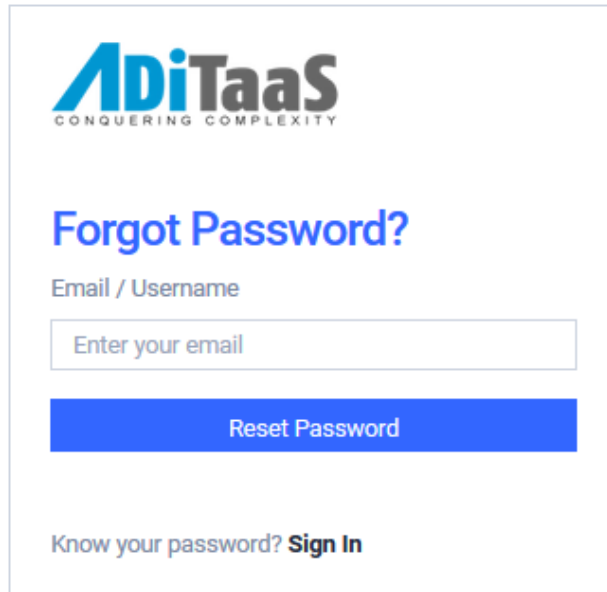
Select preferred language from list of languages available from the list.





### FORGOT PASSWORD:

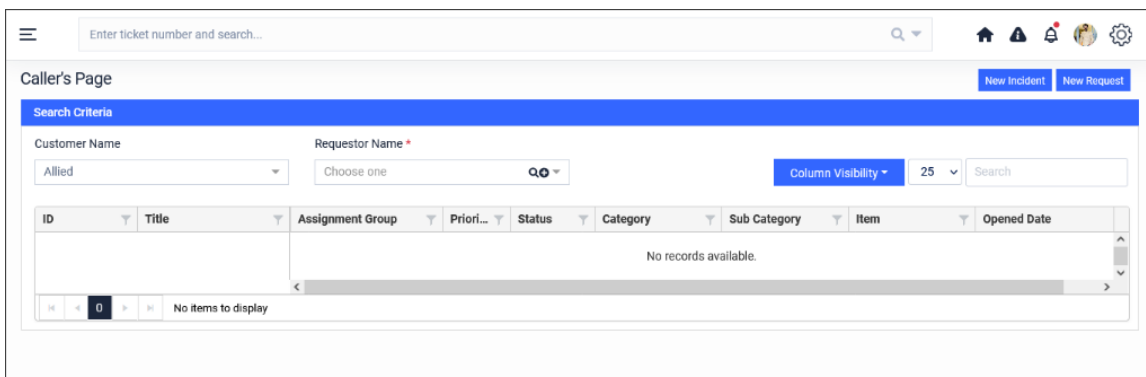
If you have forgotten your password and you previously entered an email address when signing up for the account or in your Preferences, and you still have access to that email account, then this option can help you recover access to your account.

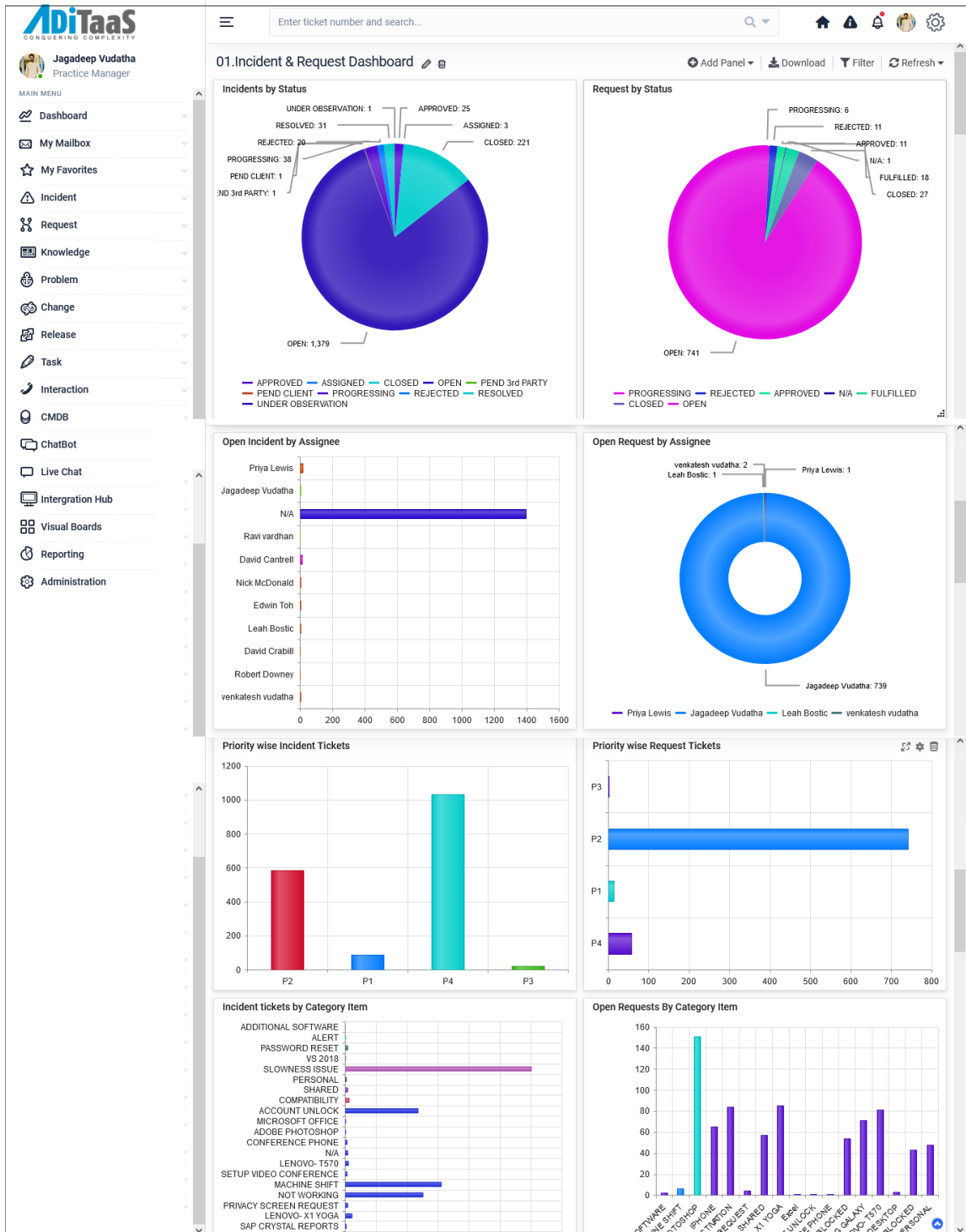


The system will send a temporary password to your saved email address that will allow you to retrieve your account. You can change the password after you log in

## Home Page

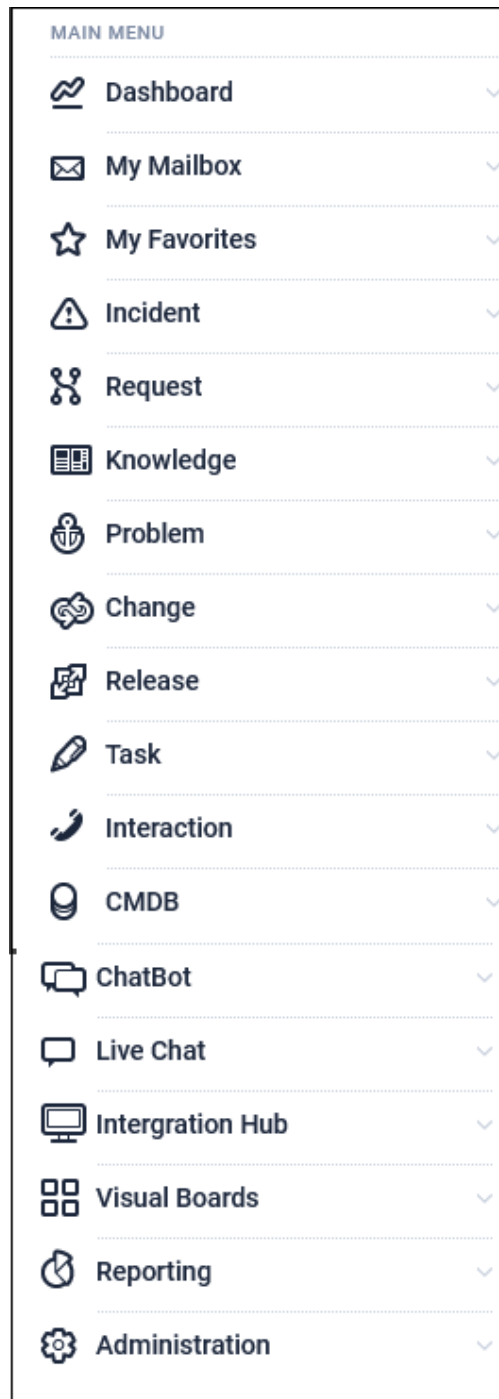
Once agent login into the portal, first page will be by default caller's page. Which can also called as home page. Later agent can change their home page to different dashboard, the home page of ADiTaaS has various menus displayed that enables an administrator or an agent to take necessary action.





**MENU BAR**

Left side main menu contains all modules. Clicking on respective module will display the sub modules.




### TOP TOOL BAR

Top tool bar contains different icons to perform various actions.



## MAXIMIZE SCREEN

On Clicking on  will hide the menu bar and displays the page in full screen.

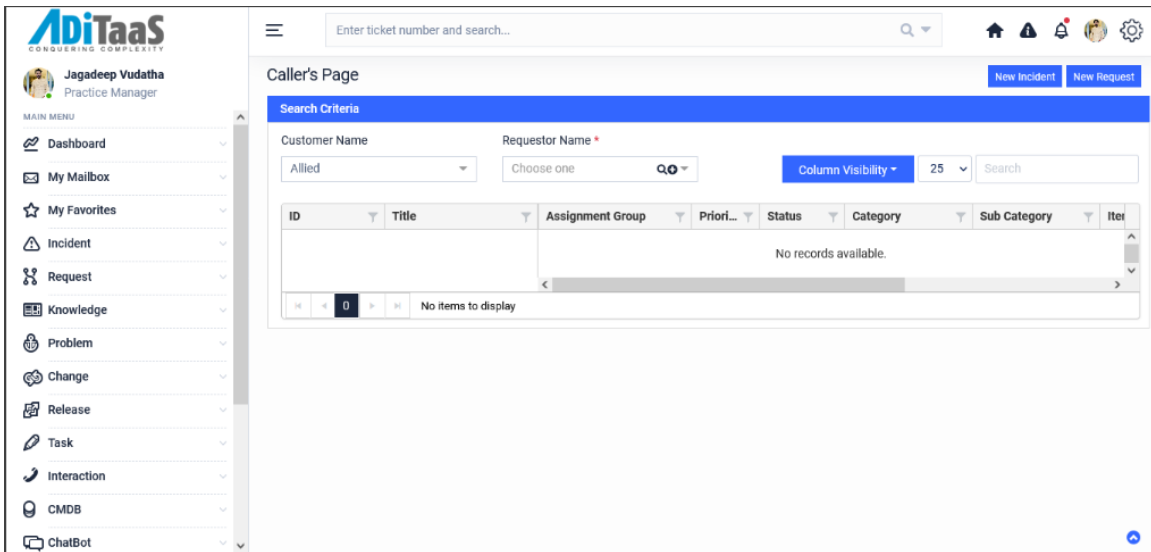


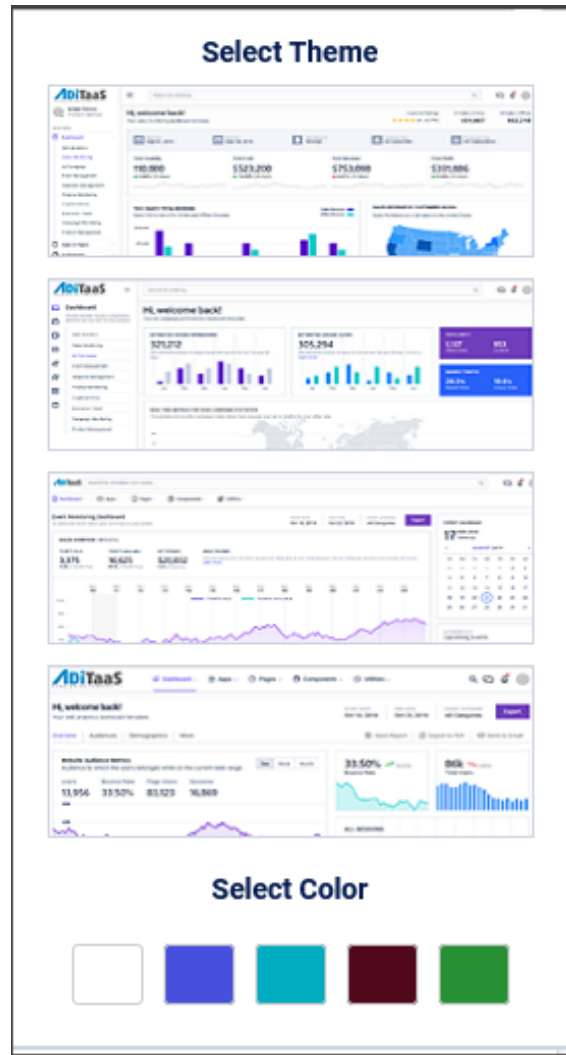
## THEME SETTINGS

Right side top we can see some icons and first one is theme settings. In by default theme you can see menus are at left side and information area is at the right end side.

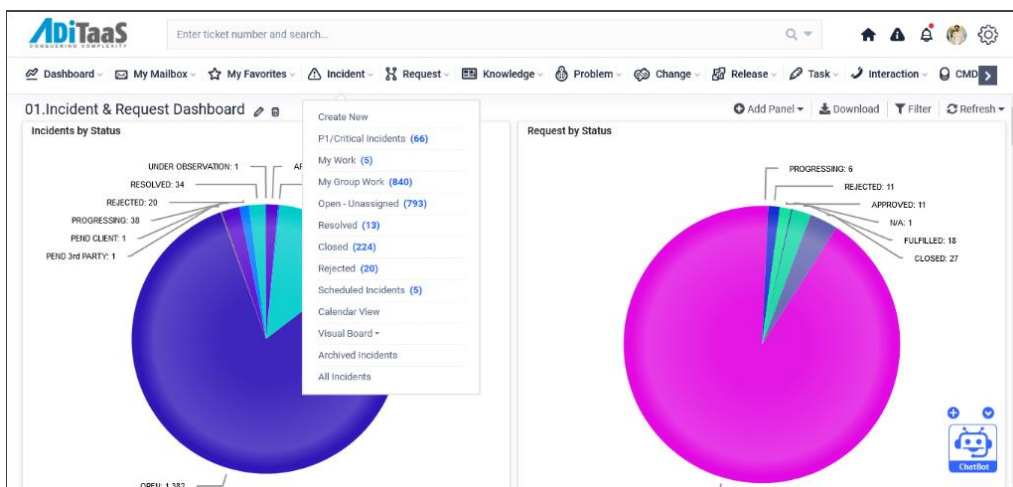
If you want you can to change the theme. There are total 4 themes are available.

On selection of each theme interface will slightly get change. You also have option to change the color.






Here in below theme menu bar is at the top and information/documentation area is at the bottom.



## USER PROFILE

Allows to modify the account related information.





**Jagadeep Vudatha**  
Practice Manager

- My Profile
- Edit Profile
- Change Password
- Account Settings
- About ADiTaaS
- Sign Out

### My Profile-

You can view and modify your personal profile. When you click My Profile displays all information regarding your account.

**ACCOUNT INFO**

- Timezone  
Asia/Calcutta
- Login ID  
jvudatha
- Contact No  
13104620926
- Email  
jagadeep.vudatha@gmail.com
- Department  
IT
- Location  
Mahape
- Address  
MBP Navi Mumbai
- City  
Mumbai

### Edit Profile-

User can to modify profile information from edit profile.

### Change Password-

Users can change their own password.

To change your own password:

1. On the toolbar, click
2. The Set Password dialog appears.
3. In the Old Password box, type your current password, then type your New Password and
4. Confirm it, then click OK.

Your password is changed

**Change Password**  
In this page you can change your current password with a new one

**CURRENT PASSWORD**  
Enter Old Password  
CURRENT PASSWORD IS REQUIRED

**NEW PASSWORD**  
Enter New Password

**CONFIRM PASSWORD**  
Re-enter New Password

Change Password Close

### Account Settings-

As ADiTaaS is a web application that can be accessed from anywhere, it is important that you set your current time zone. You do this from the Account Settings Page.

**To set your current time zone:**

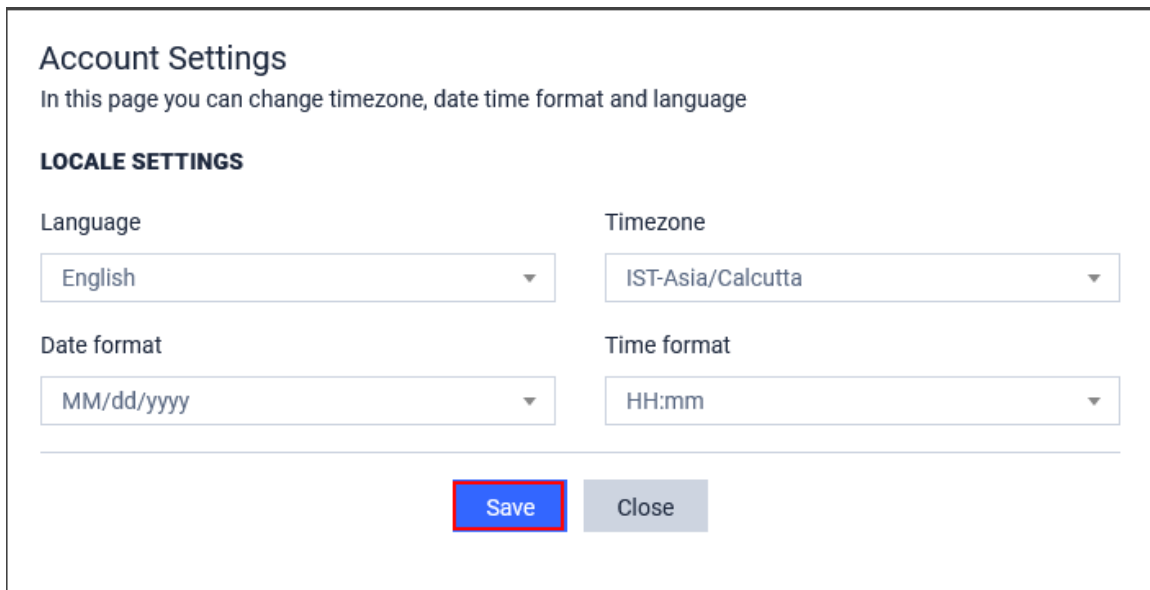
1. On the toolbar, click Account Settings
2. The Account Settings page appears.
3. In the Time zone list, select your current time zone, then click Save.

**To set Language:**

1. On the toolbar, click Account Settings
2. The Account Settings page appears.
3. In the Language list, select required language, then click Save.

### To set your Date/Time Format

1. On the toolbar, click Account Settings
1. The Account Settings page appears.
2. In the Date/Time Format, select required format then click Save.



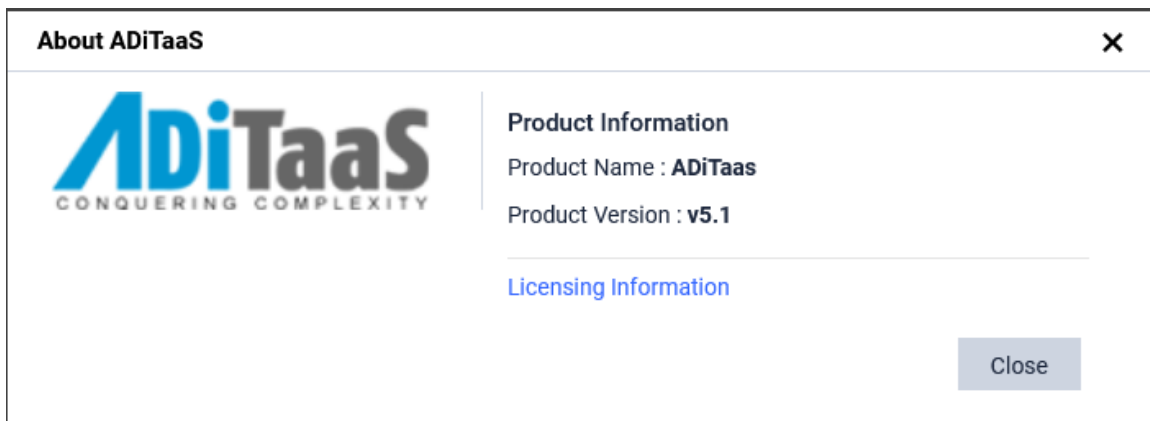
**Account Settings**  
In this page you can change timezone, date time format and language

**LOCALE SETTINGS**

Language	Timezone
English	IST-Asia/Calcutta
Date format	Time format
MM/dd/yyyy	HH:mm

### About ADiTaaS-

User can view version of ADiTaaS tool.



**About ADiTaaS** [X]

**ADiTaaS**  
CONQUERING COMPLEXITY

**Product Information**  
Product Name : **ADiTaaS**  
Product Version : **v5.1**

[Licensing Information](#)

**Sign Out-** Click on sign out to exit from the tool.



## NOTIFICATIONS

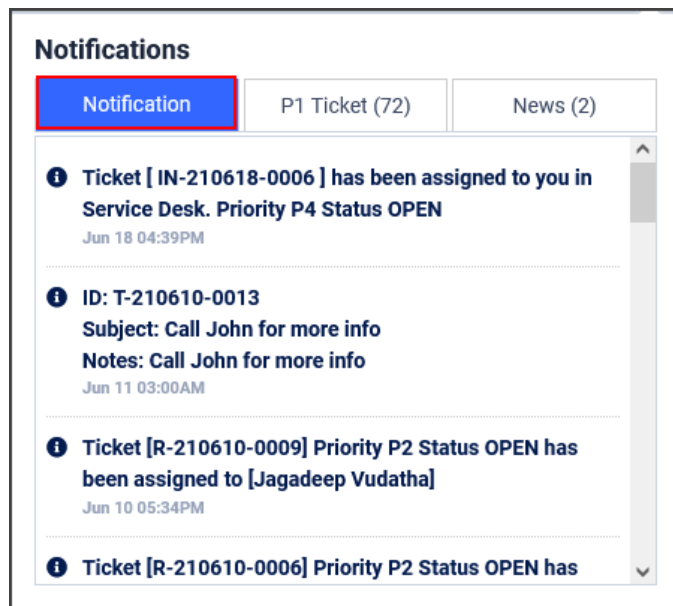
Next we have notification icon. Any notification like email notification, reminder notification all the notifications will be displayed under Notification icon.

If any new notification appears then bell icon appears to be in red color so that you will be knowing that there is a new notification.

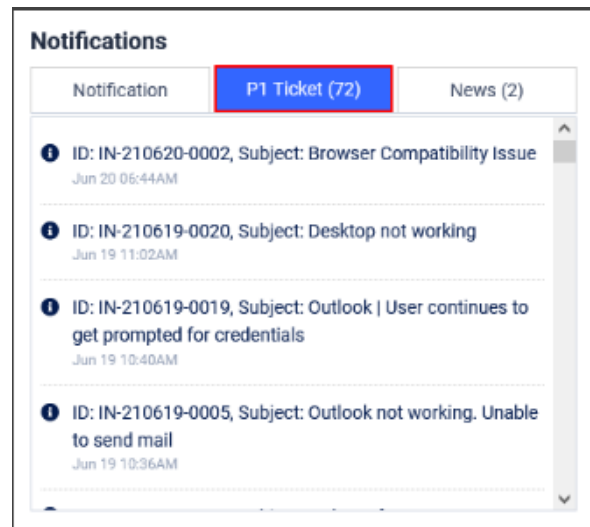


There are 3 tabs under notification icon.

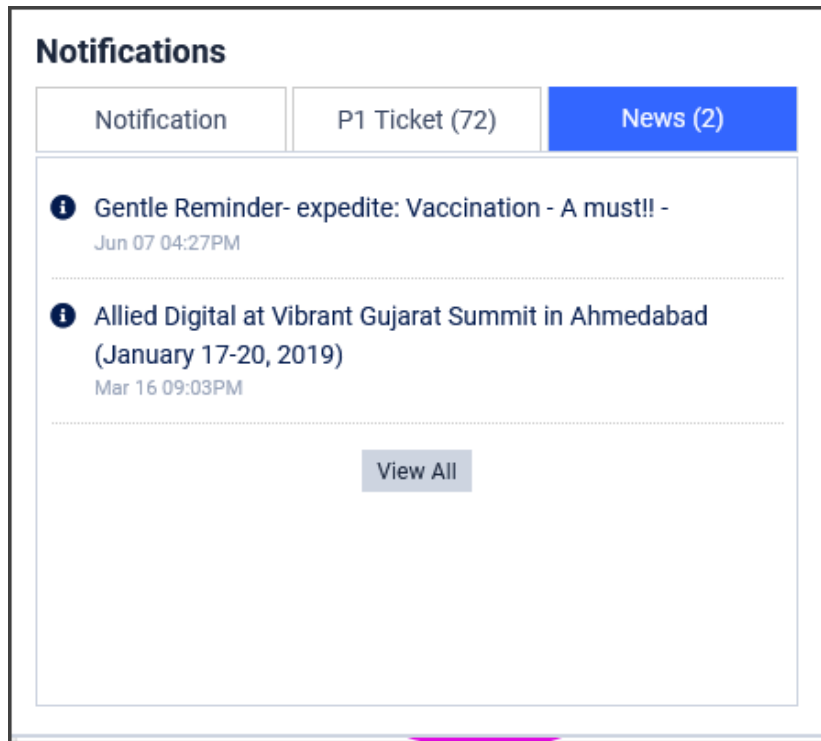
**Notifications**- Displays all kinds of notifications



**P1 Tickets**- Displays all P1 tickets with count.



**News**- Agent can view all important news published in organization under News section. Click on news title to read more. It also allows to download attachments if any.



### USER MANUAL

The User Manual contains all essential information for the user to make full use of the tool. This manual includes a description of the tool functions and step-by-step procedures for tool access and use.

Click  on tool bar to access the Agent user guide.

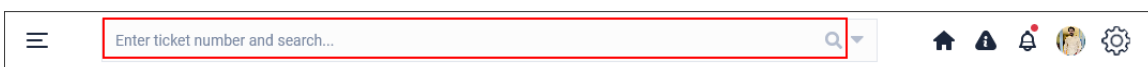
### HOME ICON

Clicking on home icon will redirect to home page.



### SEARCH FOR A TICKET

**Search** - Search bar enables user to search for particular ticket by entering ticket number in search bar.



**Advanced Search**- Allows agent to search for any tickets with user login id, email, assignment group, technician or short description.

1. Click on down arrow icon.
2. Enter the required keyword and click on search button.

The screenshot shows a navigation bar with a search input field containing the placeholder text "Enter ticket number and search...". To the right of the input field is a search icon and a dropdown arrow icon, which is highlighted with a red rectangular box. Further right are icons for home, notifications, a user profile, and settings.

The screenshot shows a modal window titled "Advance Search". It contains the following fields and buttons:

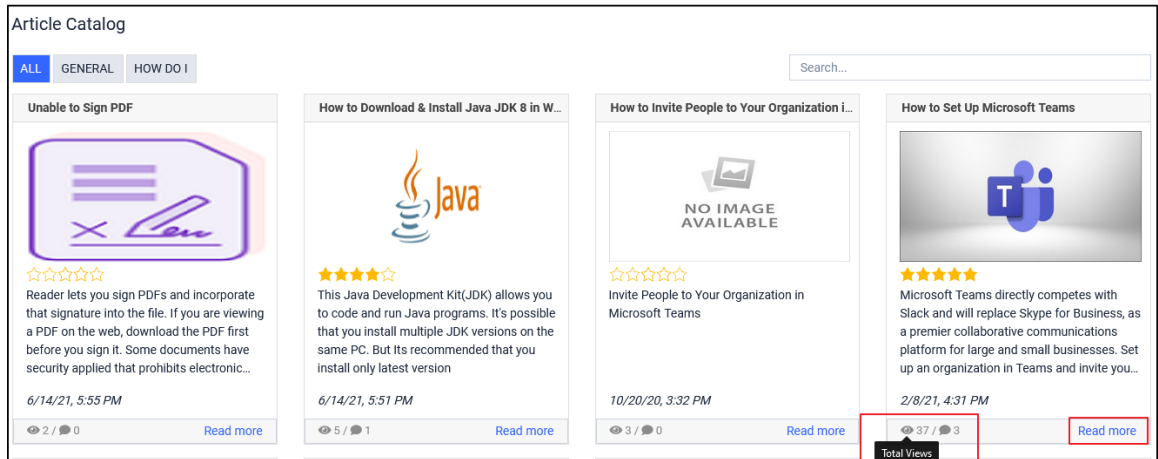
- ID Number**: A text input field.
- User NTID**: A text input field.
- Email**: A text input field.
- Assignment Group**: A text input field.
- Technician**: A text input field.
- Short Description**: A text input field.
- Search**: A blue button with a magnifying glass icon.
- Close**: A grey button.

### MY FAVORITES

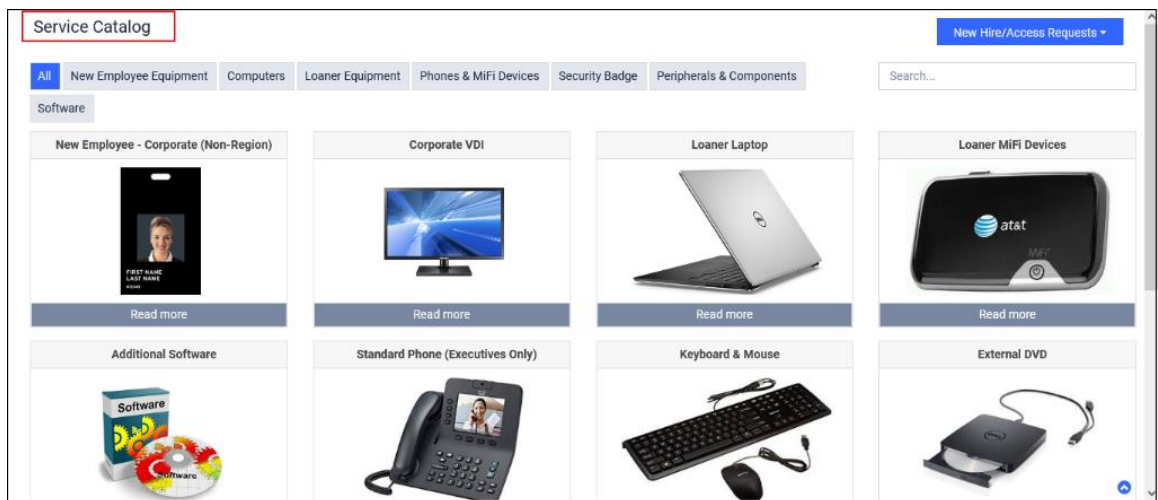
My Favorites is a combination of all the links of other modules which are used frequently.

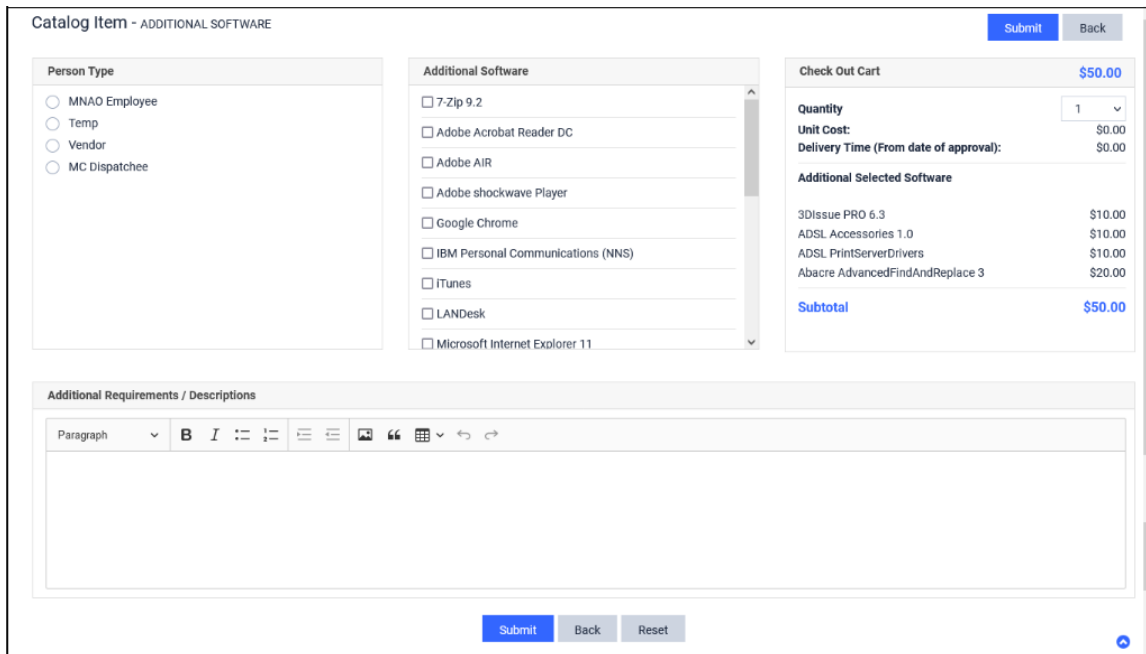
- **Caller's Page**- This is a default home page for all agents.
- **My Tickets**- Displays list of tickets for which you are a contact person or a requestor.
- **My Work**- Displays all Incidents, Requests, Tasks, Problem and Change tickets assigned to you.
- **My Group Work**- Displays all Incidents, Requests, Tasks, Problem and Change tickets assigned to your support groups.
- **My Tasks**- Displays list of task tickets assigned to you.
- **My Group Tasks**- Displays list of task tickets assigned to your support groups.

- **Open- Unassigned-** Displays list of open tickets pending to assign to individual.
- **My Approvals-** This section contains approvals assigned to you.
- **My Group Approvals-** This section will give information about the Approvals assigned to your approval groups.
- **VIP Tickets-** Displays list of all VIP tickets.
- **P1/ Critical Incidents-** Displays list of all P1/ Critical Incidents.
- **Open- Unassigned Incidents-** Displays list of open incident tickets pending to assign to individual.
- **Open- Unassigned Requests-** Displays list of open request tickets pending to assign to individual.
- **Article Catalog-** This section allows the agent to search for Knowledge Articles. These informative articles will help agent to work to solve any common known issues.

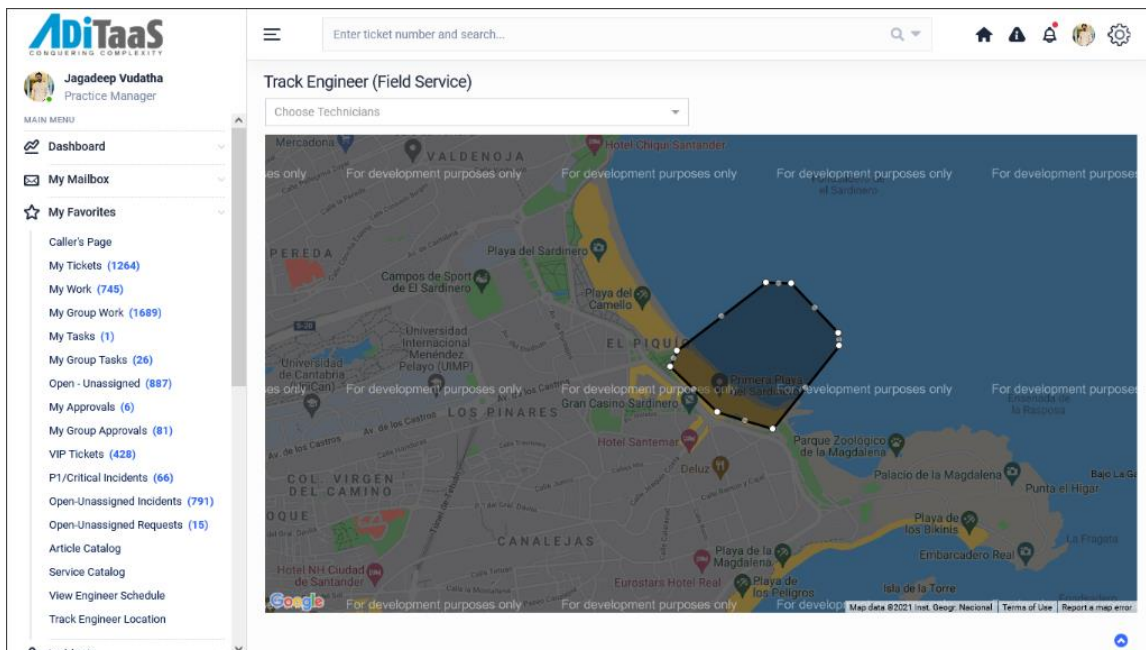


- **Service Catalog-** Displays list of services available. Click on any respective catalog item to raise a request. Fill the information and click on submit.





- **View Engineer Schedule**- Displays an each engineer’s scheduled task details.
- **Track Engineer Location** – Helps to track engineer location.



## CALLER'S PAGE

**Caller's Page** – This feature helps agents to quickly cross check if any open tickets are already exists in system for same issue reported by user. Caller's page displays all the tickets of respective user.

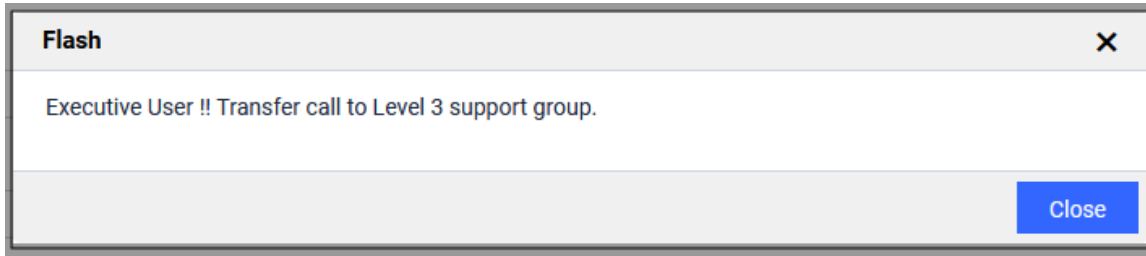
1. Go to 'My Favorites' and click on **caller's page**. Enter the '**Requestor Name**' and all ticket information associated to user will display. If contact is not present in the application, then new contact can be created by using **add contact** feature. You can use search button to find the existing contact.
2. Click on '**New Incident**' or '**New Request**' to raise new incident or request ticket respectively.

The screenshot shows the AdiTaaS interface for the 'Caller's Page'. On the left is a navigation menu with 'My Favorites' expanded, showing 'Caller's Page' as the selected item. The main content area has a search bar at the top with the text 'Enter ticket number and search...'. Below the search bar, there are two buttons: 'New Incident' and 'New Request'. The 'Search Criteria' section includes a 'Customer Name' dropdown set to 'Allied' and a 'Requestor Name' field with a search icon and a dropdown arrow. A 'Column Visibility' dropdown is set to '25'. Below the search criteria is a table with the following columns: ID, Title, Assignment Group, Priority, Status, Category, Sub Category, and Item. The table is currently empty, displaying 'No records available.' and 'No items to display'.

## VIP USER:

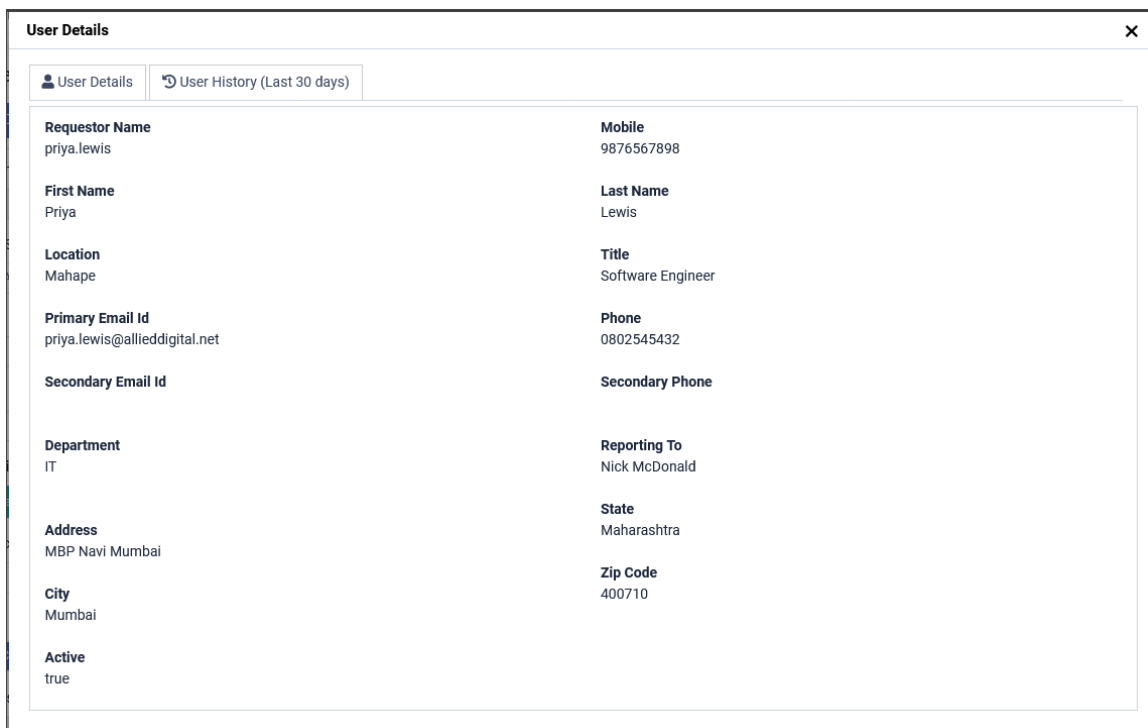
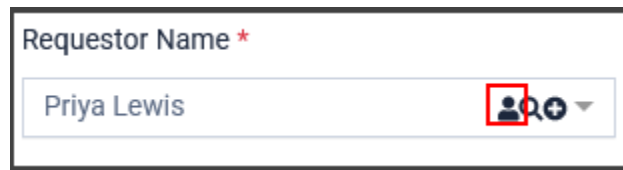
If the selected user is VIP user, then in Requestor Name field a VIP icon will be displayed, and on mouse over a pop-up will flash with more information.

This close-up shows the 'Requestor Name' field. The text 'Requestor Name \*' is at the top. Below it, the name 'Jagadeep Vudatha' is entered in the search box. To the right of the search box, there is a search icon (magnifying glass) and a red 'VIP' icon with a dropdown arrow.



## USER DETAILS

Clicking on user icon will display user information along with User ticket history for last 30 days.



**User Details** ✕

👤 User Details
🕒 User History (Last 30 days)



ID	Title	Description ↑	Requestor Name	Status	Assignment Group	Category	Sub Ca
<a href="#">IN-210616-0003</a>	Printer is not working at ...	From: Lewis, Priya *Priya.Le...	Priya Lewis	CLOSED	Service Desk	PHONE	MOBIL ^
<a href="#">IN-210513-0001</a>	Browser Compatibility Is...	Description*Browser Name...	Priya Lewis	OPEN	Service Desk	SOFTWARE	WEBAF
<a href="#">IN-210427-0006</a>	Browser Compatibility Is...	Description*Browser Name...	Priya Lewis	CLOSED	Service Desk	SOFTWARE	WEBAF
<a href="#">IN-210512-0001</a>	Outlook   User continues...	DescriptionOutlook   User c...	Priya Lewis	CLOSED	Service Desk	SOFTWARE	OUTLO
<a href="#">IN-210620-0002</a>	Browser Compatibility Is...	Description*Browser Name...	Priya Lewis	OPEN	Service Desk	SOFTWARE	WEBAF
<a href="#">IN-210620-0001</a>	Browser Compatibility Is...	Description*Browser Name...	Priya Lewis	OPEN	Service Desk	SOFTWARE	WEBAF
<a href="#">IN-210610-0007</a>	Browser Compatibility Is...	Description*Browser Name...	Priya Lewis	OPEN	Service Desk	SOFTWARE	WEBAF
<a href="#">IN-210521-0002</a>	Outlook   User continues...	DescriptionOutlook   User c...	Priya Lewis	OPEN	Server Support L2	SOFTWARE	OUTLO v

<
>
1 2 3
1 - 20 of 55 items

### CREATE NEW CONTACT

If agent doesn't find a caller's name under requestor name drop down, then new contact can be created by clicking on '+' icon.


**Requestor Name \***

Priya Lewis  

**Create Contact** Submit ✕

NTID *	Primary Email Id *	Site Name *	First Name *
<input type="text"/>	<input type="text"/>	Choose one	<input type="text"/>
Last Name *	Primary Contact No.	Secondary Contact No.	Secondary Email Id
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Mobile	Designation	Reporting To	Timezone *
<input type="text"/>	<input type="text"/>	Choose one	Choose one
Date Format *	Time Format *	Departments	<input checked="" type="checkbox"/> Is Active
Choose one	Choose one	Choose one	
<input type="checkbox"/> Is VIP			
Submit		Cancel	

### SEARCH FOR REQUESTOR NAME

Click on  (magnifying glass) to search any contact details.

**Requestor Name \***

Priya Lewis   



Requestor Name	First Name	Last Name	Email	Phone
<a href="#">LeahJBostic</a>	Leah	Bostic	LeahJBostic@allieddigital.net	9865421545
<a href="#">StephanieCLanes</a>	Stephanie	Llanes	StephanieCLanes@allieddigital.net	89568989784
<a href="#">ElaineJFarnsworth</a>	Elaine	Farnsworth	ElaineJFarnsworth@allieddigital.net	23565989455
<a href="#">Deepak</a>	Deepak	Shukla	deepak.shukla@allieddigital.net	9898787865
<a href="#">Vedantha</a>	Vedantha	Shukla	Vedantha.shukla@allieddigital.net	9878767876
<a href="#">Edwin</a>	Edwin	Toh	JVudatha@allieddigital.net	87498712313
<a href="#">Deepali</a>	Deepali	Shukla	mahesh.shet@allieddigital.net	67676567678
<a href="#">jvudatha</a>	Jagadeep	Vudatha	jagadeep.vudatha@gmail.com	13104620926
<a href="#">Bill</a>	Frasher	Frasher	BillJFrasher@allieddigital.net	9878789867
<a href="#">priya.lewis</a>	Priya	Lewis	priya.lewis@allieddigital.net	9876567898
<a href="#">AshleyCAckerman</a>	Ashley	Ackerman	AshleyCAckerman@allieddigital.net	789654321
<a href="#">FranciscoJMays</a>	Francisco	Mays	FranciscoJMays@allieddigital.net	789654123
<a href="#">Bob</a>	Bob	Smith	JVudatha@allieddigital.net	987987654654
<a href="#">DorthyEMorris</a>	Dorthy	Morris	DorthyEMorris@allieddigital.net	123456789
<a href="#">NealTWilliams</a>	Neal	Williams	NealTWilliams@allieddigital.net	123456789

1 - 15 of 29 items

## My Mailbox

Tool facilities to configure personal or support group mailbox within the tool.

The screenshot displays the ADiTaaS user interface. On the left, a sidebar menu shows 'My Mailbox' highlighted with a red box. The main area is divided into two sections: 'COMPOSE' and 'Inbox (10)'. The 'Inbox' section shows a list of 10 messages, including several 'Undeliverable: Test by Allied Team, please ignore' notifications and an 'ADiTaaS V5 Email Notification for Sign Up'.

## Incident Management

Incident is defined as an unplanned interruption or reduction in quality of an IT service (a Service Interruption).

### LOGGING INCIDENT

Incidents can be created via a different ways, such as web application, email, phone call or monitoring systems.

To create a new incident using the web application,

1. In shortcut bar, go to **Incident** Module → Click on '**Create New**'
2. Displays a new Incident creation page
3. Enter all \* marked following mandatory fields.
  - a. **Client Name**- This is a mandatory field and data is auto populated with client information.
  - b. **Requestor Name**- Mandatory field. Select contact details of user who has reported issue. If contact is not present in the application, then new contact can be created by using **add contact** feature. You can use search button to find the existing contact.
  - c. **Location**- Mandatory field. Auto populates user location from system.
  - d. **Contact No**- Optional Field. Auto populates user contact number from system.
  - e. **Category/ Sub Category/ Item**- Mandatory field. This fields helps to classify type of incidents logged. Select the relevant category, subcategory and item to which incident can be grouped.
  - f. **Status**- Mandatory field. There are different status available throughout the life cycle of incident. Initially all tickets will be in 'OPEN' Status.
  - g. **Preferred Contact**- Provides an option to select whether to send notification on primary or secondary contact.
  - h. **Notification Mode**- Tool provides an option to get notify by Email, SMS or Call.
  - i. **Impact**- Mandatory field .Ticket **Impact** can change to 'HIGH', 'MEDIUM' or 'LOW' depend on incident. Depend on selected impact and urgency priority gets auto set as configured in Priority matrix. Upon changing the impact/urgency tool will ask to enter reason for impact/urgency change. Entered details will be added in activity log.
  - j. **Urgency**- Mandatory field .Ticket **Urgency** can change to 'HIGH', 'MEDIUM' or 'LOW' depend on incident. Depend on selected impact and urgency priority gets auto set as configured in Priority matrix. Upon changing the impact/urgency tool will ask to enter reason for impact/urgency change. Entered details will be added in activity log.
  - k. **Priority**- Mandatory field .By default incident priority is set to 'P4'. Depend on impact and urgency of the incident agent can change the priority. Priority will be auto populated depend on configured Priority Matrix. Only agent with priority override access will be able to override the priority. Upon overriding the priority tool will ask to enter the reason for Priority change and enter details will be captured in activity log.

- l. Channel-** Mandatory field .Channel indicates source through which incident is logged. Ticket logged via self-service will have by default 'SELF SERVICE' as a channel. Ticket logged via email manager will have by default 'Email' as a channel. Ticket logged via monitoring tool will have by default 'Alert' as a channel.
- m. Assignment Group-** Mandatory field. Select appropriate support group to work on incident. Ticket logged via self-service will have by default 'Service Desk' group as an assignment group.
- n. Technician Name-** Assign ticket to individual. Depend on selected assignment group, technician names will be appear on the drop down list.
- o. Configuration Item-** Optional field. Related CI can be added to the ticket.
- p. Flags-** Enter flag as FCR, NEFCR, Misroute, NO KBA etc.
- q. Alternate Location:** Optional field. Provides an option to enter alternate location.
- r. Alternate Contact:** Optional field. Provides an option to enter alternate contact.
- s. Vendor Ticket Number-** Optional field. Third Party ticket id can be maintained in this field.
- t. Opened Date:** System auto captures date and time when incident is created.
- u. Opened By:** System auto captures name of the agent/ end user who has created the incident.
- v. Incident Description:** Provide a relevant title to the incident that will exactly summarize the incident.
- w. Symptoms:** Provide a detailed description with any other associated details relevant to the incident.

4. Once all the required mandatory are filled and click on **Submit** button.
5. Click on Add attachment button to add attachment during the ticket creation
6. New incident will be created with **unique incident ID** and an email notification is sent to confirm that the ticket has been logged.

Enter ticket number and search...
🔍

**Edit Incident - IN-210620-0004**
Update
Action
Search Related Items

Ticket Details
Activity Log
Task (0)
Approval (0)
Links (0)
Schedules (0)
More Info
Impacted CI (0)
Interaction (0)
Resolution

Client Name *	Requestor Name *	Location	Contact No.
Allied	Priya Lewis	Mahape	0802545432
Category/Sub Category/Item *	Response Target	Resolution Target	
SOFTWARE/APPLICATION/SLOWNESS ISSUE	0%	0%	
Status *	Impact *	Urgency *	Priority *
OPEN	LOW	LOW	P4
Channel *	Assignment Group *	Technician Name	Preferred Contact
PHONE	Service Desk	Choose one	Primary
Field Service	Configuration Item	Alternate Contact	Alternate Location
Schedule Call Track Engineer	CI-210526-0041		
Vendor Ticket Number	On Behalf Of	Notification Mode	

Flags

- ✖ First Contact Resolution (FCR)

NEFCR Description	Opened By	Opened Date	Target Resolve Date
Choose one	Jagadeep Vudatha	06/20/2021 17:15:15	

Incident Description \*

Application Slowness Issue

Symptoms \*

Paragraph

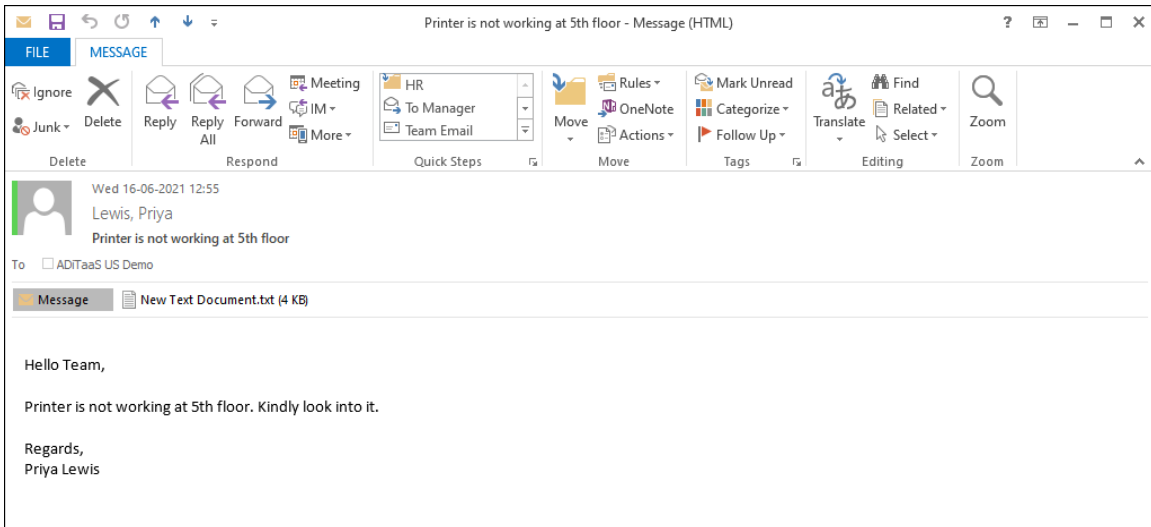
Application Name - [Enter the application name]

Number of Users Impacted - [Enter the number]

Update
Cancel

### INCIDENT CREATED VIA EMAIL MANAGER

1. Incidents created via email manager will have by default channel as 'Email'.
2. Email Subject and Email body details will be mapped to Incident description and symptoms field respectively.
3. Any attachments in the mail will be added as attachment



The screenshot shows the ADiTaaS dashboard for Jagadeep Vudatha, Practice Manager. The "My Group Work" section displays a table of tickets. The first row is highlighted with a red border.

ID	Title	Description	Requestor Name	Status	Assignee
IN-210616-0002	Printer is not working at 5th floor	From: Lewis, Priya "Priya.Le..."	ITSM Agent <b>YIP</b>	OPEN	Service
IN-210615-0002	Deskphone is not working	Deskphone is not working	Priya Lewis	OPEN	Service
IN-210612-0002	Keep your files synced across all yo...	From: Dropbox "no-reply@dr..."	Default Email User	OPEN	Service
IN-210610-0015	UNABLE TO INSTALL MS OFFICE	UNABLE TO INSTALL MS O...	Jagadeep Vudatha <b>YIP</b>	PROGRESSING	Network
IN-210610-0013	[PRTG Network Monitor (ADSLUSLV...	From: PRTG Network Monit...	Default Email User	OPEN	Service

Enter ticket number and search...

**Edit Incident - IN-210616-0002** [Update] [Action] [Search Related Items] [View Attachment(s)]

Ticket Details | Activity Log | Task (0) | Approval (0) | Links (0) | Schedules (0) | More Info | Impacted CI (0) | Interaction (0) | Resolution

Client Name: Allied | Requestor Name: ITSM Agent | Location: Mahape | Contact No.: 54545454545

Category/Sub Category/Item: PHONE/MOBILE PHONE/SAMSUNG GALAXY | Response Target: 100% | Resolution Target: 20%

Status: OPEN | Impact: LOW | Urgency: LOW | Priority: P4

Channel: EMAIL | Assignment Group: Service Desk | Technician Name: Choose one | Preferred Contact: Choose one

Field Service: [Schedule Call] [Track Engineer] | Configuration Item: Choose one | Alternate Contact: | Alternate Location: |

Vendor Ticket Number: | Notification Mode: |

Flags: Choose one

NEFCR Description: Choose one | Target Resolve Date: 06/16/2021 23:45:26

Incident Description: Printer is not working at 5th floor

Symptoms: Paragraph | From: Lewis, Priya 'Priya.Lewis@allieddigital.net' | To: ADiTaaS US Demo 'aditaasusdemo@allieddigital.net' | Sent: 06/16/2021 12:25 AM | Subject: Printer is not working at 5th floor

Description: Hello Team, Printer is not working at 5th floor. Kindly look into it. Regards, Priya Lewis

[Update] [Cancel]

## INCIDENT CREATED VIA MONITORING TOOL

Incidents created via monitoring tool will have by default channel as 'Alert'.

ADiTaaS CONQUERING COMPLEXITY

Jagadeep Vudatha Practice Manager

My Favorites | Incident | Create New | P1/Critical Incidents (20) | My Work (3)

Enter ticket number and search...

My Group Work [Action] [Column Visibility] 25 [Search]

ID	Title	Description	Requestor Name	Status
IN-210603-0002	[PRTG Network Monitor (ADSLUSLV...	New Status: Threshold reac...	Jagadeep Vudatha <b>TIP</b>	OPEN
IN-210603-0001	Application Slowness Issue	Application Name - [Enter th...	Priya Lewis <b>TIP</b>	PROGRESSING
IN-210602-0001	Laptop is consuming high memory	Laptop is consuming high ...	Priya Lewis <b>TIP</b>	OPEN
IN-210601-0003	Younify Application slowness issue	Younify Application slowne...	mahesh shet	OPEN

**Edit Incident - IN-210603-0002**

Client Name: Allied | Requestor Name: Jagadeep Vudatha | Location: Mahape | Contact No.: 14522

Category/Sub Category/Item: HARDWARE/LAPTOP/LENOVO- X1 YOGA | Response Target: 0% | Resolution Target: 0%

Status: RESOLVED | Impact: MEDIUM | Urgency: MEDIUM | Priority: P2

Channel: ALERT | Assignment Group: Service Desk | Technician Name: Choose one | Preferred Contact: Choose one

Field Service: Schedule Call | Track Engineer | Configuration Item: CI-200612-0001 | Alternate Contact: | Alternate Location: |

Incident Description: [PRTG Network Monitor (ADSLUSLVAPP5)] PRTG Core Server Core Health (Autonomous) (Core Health (Autonomous)) Threshold reached (Health) (15 %) (OK)

Symptoms: **New Status: Threshold reached (Health) (15 %)**  
 -----  
**Date/Time:** 6/3/2021 4:44:33 AM (Pacific Standard Time)  
**Device:** PRTG Core Server ()  
**Last Result:** 100 %  
**Last Message:** OK  
 -----

Buttons: Update, Cancel

## COMMON INCIDENTS

Creating individual form for each incident template for the most frequently raised incidents such as, printer problem, outlook, AD account unlock. The fields can be pre filled with values so that an incident can be created instantly. Under Administration module all templates can be configured and during the incident creation all configured templates will be displayed under common incidents drop down.

1. Navigate to **Incident Module** from left menu bar
2. Click on Create New, displays new incident creation page
3. Select the required Create New template from **common incidents** drop down
4. The fields can be pre filled with values
5. Enter the Requestor name and any additional information if any
6. Click on **Submit**



## INCIDENT DATA GRIDS

### My Work/ My Group Work

Once incident is logged, Agent can view incidents which are assigned to him under 'My Work' and all the incidents which are assigned to his groups are visible under 'Group Work' tab.

Go to **Incident** module → Click on 'My Work' or 'My Group Work'

ID	Title	Description	Requestor Name	Status	Assigner
IN-210620-0004	Application Slowness Issue	Application Name - [Enter th...	Priya Lewis	OPEN	Service De
IN-210620-0002	Browser Compatibility Issue	Description*Browser Name...	Priya Lewis	OPEN	Service De
IN-210619-0020	Desktop not working	Desktop not working	Edwin Toh	PROGRESSING	Service De
IN-210619-0019	Outlook   User continues to get pro...	Outlook   User continues to ...	Jagadeep Vudatha	OPEN	Service De
IN-210619-0004	Application Slowness Issue	Application Name - [Enter th...	Jagadeep Vudatha	OPEN	Service De
IN-210619-0003	SYSTEM / MONITORING / ALERT	SYSTEM / MONITORING / A...	Jagadeep Vudatha	OPEN	Service De
IN-210619-0001	Desktop not working	Desktop not working	Priya Lewis	PROGRESSING	Service De
IN-210618-0009	Account is locked..	Account is locked..	Jignesh Sodvadiya	OPEN	Service De
IN-210618-0007	My Ad account locked	From: Sodvadiya, Jignesh *...	Jignesh Sodvadiya	OPEN	Service De
IN-210612-0002	Keep your files synced across all yo...	From: Dropbox 'no-reply@dr...	Default Email User	OPEN	Service De
IN-210610-0015	UNABLE TO INSTALL MS OFFICE	UNABLE TO INSTALL MS O...	Jagadeep Vudatha	PROGRESSING	Network Si
IN-210610-0013	[PRTG Network Monitor (ADSLUSLV...	From: PRTG Network Monit...	Default Email User	OPEN	Service De
IN-210610-0012	[PRTG Network Monitor (ADSLUSLV...	From: PRTG Network Monit...	Default Email User	OPEN	Service De
IN-210610-0011	Pink Verify Demo with Edwin - with ...	From: Jagadeep Vudatha 'J...	Robert Downey	OPEN	Service De
IN-210610-0010	Pink Verify Demo with Edwin	From: Jagadeep Vudatha 'J...	Robert Downey	OPEN	Service De
IN-210610-0008	Laptop Not working, please replace ...	Laptop Not working, please ...	Edwin Toh	OPEN	Service De
IN-210610-0007	Browser Compatibility Issue	Description*Browser Name...	Priya Lewis	OPEN	Service De
IN-210610-0006	Browser Compatibility Issue	Description*Browser Name...	Jagadeep Vudatha	OPEN	Service De

**P1/ Critical Incidents-** Displays list of all P1/ Critical Incidents

**Open –Unassigned-** Displays list of open incident tickets pending to assign to individual

**Resolved -** Displays list of resolved incidents

**Closed-** Displays list of all closed incidents

**Rejected-** Displays list of rejected incidents

**Scheduled Incidents-** Displays list of all scheduled incidents

**Calendar View-** Displays scheduled incidents, set reminders on calendar view.

## Archived Incidents

Displays all archived incidents

### View Archived Incidents

1. Navigate to Incident module from left menu bar
2. Click on Archived Incidents

ID	Short Description	Contact Name	Location	Contact No.	Channel	Status	Resolved On
IN-200614-0078	Unlock the AD Account	Jagadeep Vudatha	Mahape		CHAT	CLOSED	06/15/2020
IN-200317-0008	Jagadeep Vudatha for Unlock the Account	Jagadeep Vudatha	Mahape	0612652849	CHAT	CLOSED	03/19/2020
IN-200402-0010	Jagadeep Vudatha for Unlock the Account	Jagadeep Vudatha	Mahape	0612652849	CHAT	CLOSED	04/03/2020
IN-200402-0009	Jagadeep Vudatha for Unlock the Account	Jagadeep Vudatha	Mahape	0612652849	CHAT	CLOSED	04/03/2020
IN-200127-0003	Laptop not working	Jagadeep Vudatha	Mahape	0612652849	CHAT	CLOSED	01/27/2020

### View Archived Incidents Report

1. Navigate to Reporting module from left menu bar
2. Click on Report Catalog
3. Move to Archived Reports Widgets
4. Select Archived Incident Report to view all archived incident records

ID	Short Description	Contact Name	Location	Contact No.	Channel	Status	Resolved On
IN-200402-0010	Jagadeep Vudatha for Unlock the Account	Jagadeep Vudatha	Mahape	0612652849	CHAT	CLOSED	04/03/2020
IN-200402-0009	Jagadeep Vudatha for Unlock the Account	Jagadeep Vudatha	Mahape	0612652849	CHAT	CLOSED	04/03/2020

### Restore Archived Records-

1. Navigate to Reporting module from left menu bar
2. Click on Report Catalog
3. Move to Archived Reports Widgets
4. Select Archived Incident Report to view all archived incident record
5. Select required tickets to be restore by clicking on checkbox and click on Action menu
6. Click on Restore Archive Data to restore the records

**AdiTaaS** CONQUERING COMPLEXITY

Enter ticket number and search...

**Archived Incidents**

ID	Short Description	Contact Name	Location	Contact No.	Status	Resolved On
<input checked="" type="checkbox"/> IN-200402-0010	Jagadeep Vudatha for Unlock the Account	Jagadeep Vudatha	Mahape	061	CLOSED	04/03/2020
<input type="checkbox"/> IN-200402-0009	Jagadeep Vudatha for Unlock the Account	Jagadeep Vudatha	Mahape	061	CLOSED	04/03/2020

Count: 2  
1 - 2 of 2 items

- Refresh Report
- Save as Excel
- Save as PDF
- Send as Email
- Delete Report
- Schedule Report
- Restore Archive Data**
- Edit Report

**AdiTaaS** CONQUERING COMPLEXITY

IN-200402-0010

**Archived Incidents**

ID	Short Description	Contact Name	Location	Contact No.	Channel	Status	Resolved On
<input checked="" type="checkbox"/> IN-200402-0010	Jagadeep Vudatha for Unlock the Account	Jagadeep Vudatha	Mahape	0612652849	CHAT	CLOSED	04/03/2020
<input type="checkbox"/> IN-200402-0009	Jagadeep Vudatha for Unlock the Account	Jagadeep Vudatha	Mahape	0612652849	CHAT	CLOSED	04/03/2020

**Do you want to Restore Archive data?**

The screenshot shows the 'Archived Incidents' page in the ADiTaaS system. The interface includes a sidebar with navigation options, a main content area with a table of incidents, and a notification box at the bottom right. The table has the following data:

ID	Short Description	Contact Name	Location	Contact No.	Channel	Status	Resolved On
IN-200402-0009	Jagadeep Vudatha for Unlock the Account	Jagadeep Vudatha	Mahape	0612652849	CHAT	CLOSED	04/03/2020

A green notification box at the bottom right of the interface displays the message: "Archive data restored successfully..".

Incidents can also restore from **Incident Module** → **Archived incidents** data grid using **Restore Archive Data** action.

Restored records will be removed from Archived report and available on Active list.

**All Incidents**- Displays list of all incidents.

### EDIT/ UPDATE INCIDENT

On successful creation of ticket, system will generate unique ticket id. Ticket id starts with date and number. **IN** indicates incident ticket.

Agent can perform more actions on edit incident screen, where agent can modify the information in the screen and click on Update button to save the changes.

The screenshot shows the 'Edit Incident' page for ticket IN-210620-0004. The 'Action' dropdown menu is open, and the 'Add Notes' option is highlighted with a red box. The form fields include Client Name (Allied), Requestor Name (Priya Lewis), Location (Mahape), Category/Sub Category/Item (SOFTWARE/APPLICATION/SLOWNESS ISSUE), Status (OPEN), Impact (LOW), Urgency (LOW), Channel (PHONE), Assignment Group (Service Desk), Technician Name (Choose one), Configuration Item (CI-210526-0041), and NEFCR Description (Choose one). The 'Response Target' is 100% and the 'Resolution' is 25%.

## ADD NOTES

1. To add any additional information or work logs to ticket, click on **Action** → **Add Notes**.

The screenshot shows the 'Add Notes' dialog box open over the 'Edit Incident' page. The dialog box has a title bar and a list of checkboxes for selecting action items: 'Internal Notes', 'Email this note to technician', 'Email this note to support group', 'Email this note to requestor', and 'Watch list'. The 'Add Notes' option in the dropdown menu is highlighted with a red box.

2. Add Notes dialog box will open
3. Click on checkbox to select required action items available on notes window
  - **Internal Notes:** Notes will be visible only agents. By default added notes will be visible for both agents and end users.
  - **Email this note to technician:** Email notification will be sent to assigned technician with added notes.
  - **Email this note to support group:** Email notification will be sent to all members of ticket assigned group with notes.
  - **Email this note to requestor:** Email notification will be sent to requestor with added notes.
  - **Watch list:** This functionality enables technician to add any email id to keep posted with ticket updates. Once email id is added to watch list, all noticeable members will receive notification on any status change, on notes added and on resolution of the ticket.

4. Enter the required comments/images/screenshots in the Notes section and click on **Add Notes**. Added information will be visible in **Activity Log**.

#### ADD ATTACHMENT:

1. To add an attachment to a ticket, click on **Action → Add Attachment**.
2. On clicking will open up a new window.
3. From the file chooser window, click on Browse to choose the file to be attached
4. Click open to upload the attachment.

Edit Incident - IN-210620-0004

Update Action Search Related Items

Ticket Details Activity Log Task (0) Approval (0) Links (0) Schedules (0) More Info Impacted CI (0) Interactions

Client Name \* Requestor Name \* Location

Allied Priya Lewis Mahape

Category/Sub Category/Item \* Response Target

SOFTWARE/APPLICATION/SLOWNESS ISSUE 100%

25%

Add Notes  
Add Attachment  
Send Email  
Set Reminder  
Print  
Copy as New  
New Article

**Add Attachment**

Browse... No file selected.

Or Drag It Here.

	File Name	Attached By	Attached On
<input type="checkbox"/>	New Text Document.txt	Jagadeep Vudatha	06/20/2021 20:10:58

Delete Attachment Close

All Uploaded attachments will be visible Under 'View Attachment(s)' tab.

Edit Incident - IN-210620-0004

Update Action Search Related Items View Attachment(s)

Ticket Details Activity Log Task (0) Approval (0) Links (0) Schedules (0) More Info Impacted New Text Document.txt

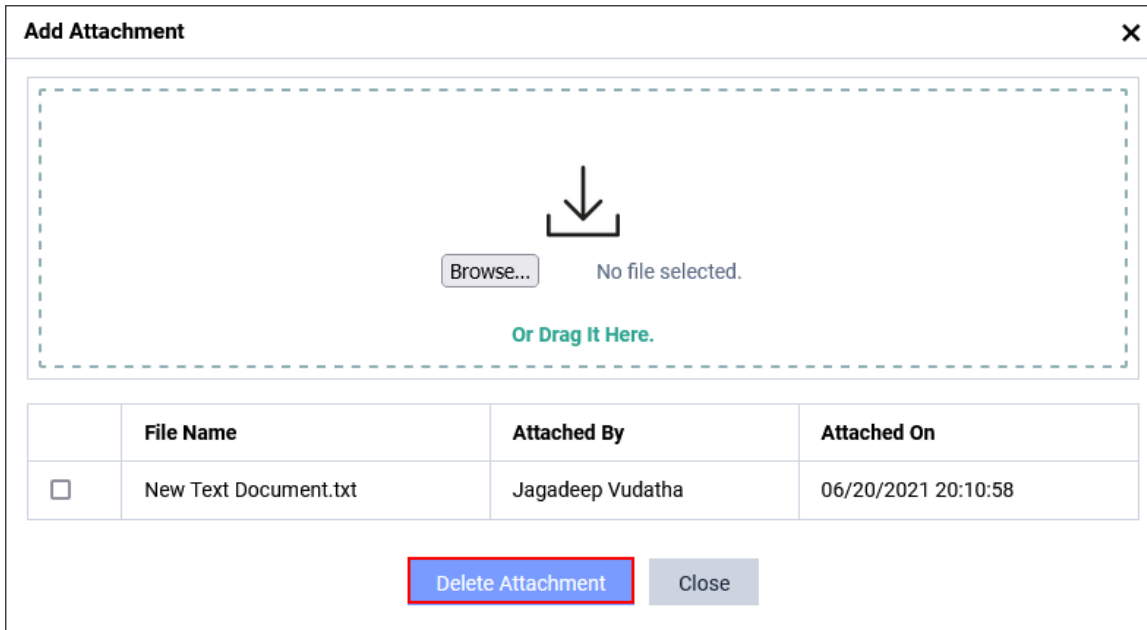
Client Name \* Requestor Name \* Location Contact No.

Allied Priya Lewis Mahape 0802545432

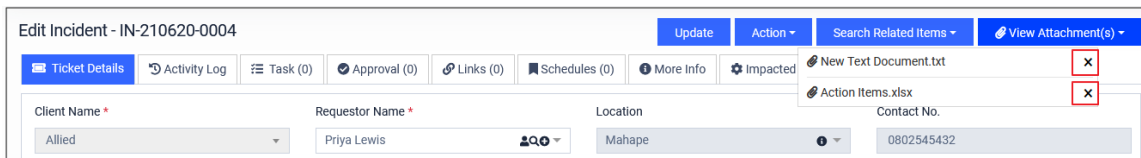
### DELETE/ REMOVE ATTACHMENT:

To remove an attachment, click on respective attached attachment by clicking on checkbox and click on 'Delete Attachment'.



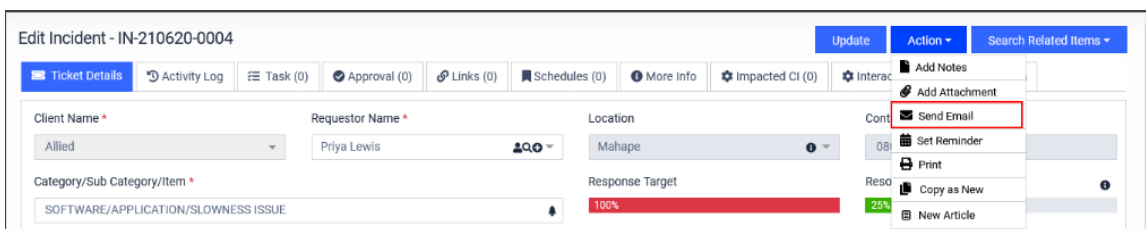


To quick delete an attachment , click on **'View Attachment(s)'** tab and go to respective attachment click on **'x'** placed next to it.



**SEND MAIL:**

1. To send an email from ticket, click on **Action → Send Email.**



2. Compose email, user email id and ticket id will be auto populated in **'To'** and **'Subject'** fields respectively. Attach any files by clicking on Browse.

3. When complete, click on 'Send Email'. All actions are captured in Activity Log.

## SET REMINDER

Set reminder functionality allows agents to set a reminder to alert on some important tasks/events like contacting end user at specific given time or follow up on any task. It allow to put a date/time and option to select whomever you want to remind.

1. To a set reminder, click on **Action** → **Set Reminder**.

2. Set reminder dialog box is displayed. Enter the **Subject** and **Comments** in box.
3. Select checkbox, if required to send an email notification regarding the notification.
4. In select applicable option from "To Whom" drop down list.
  - a. **Remind me** – Reminder will be set for logged in agent.
  - b. **Support Group Members**- Reminder will be set for selected support group.
  - c. **Some else** – Provides option to set a reminder to specific person.
5. **Remind Time** –Select date/time to set a reminder.

**Set Reminder** ✕

Subject \*

Comments \*

Send Email

To Whom \* Remind Time\*

Remind Me 06/21/2021 06:00:00

Submit
Cancel

## SHOW REMINDERS

All scheduled reminders will be visible under **Action → Show Reminders** as well as on **Incident → Calendar** view.

Edit Incident - IN-210621-0001 Update **Action** Search Related Items

Ticket Details Activity Log Task (0) Approval (0) Links (0) Schedules (0) More Info Impacted CI (0) Interact

Client Name \* Requestor Name \* Location

Allied Jignesh Sodvadiya Mahape

Category/Sub Category/Item \* Response Target

SOFTWARE/APPLICATION/SLOWNESS ISSUE 8%

Status \* Impact \* Urgency \*

OPEN LOW LOW

Channel \* Assignment Group \* Technician Name

PHONE Service Desk Choose one

Field Service Configuration Item Alternate Contact

Schedule Call Track Engineer CI-210526-0041

Add Notes  
 Add Attachment  
 Send Email  
**Show Reminders**  
 Print  
 Copy as New  
 New Article  
 New Task  
 New Problem  
 New Change  
 New Request  
 New Approval  
 Yank

**Show Reminders** ✕

<input type="checkbox"/>	Notes	Subject	Scheduled Date & Time	Follow Up Type	Set By
<input type="checkbox"/>	Contact user at 10 AM today	Contact user at 10 AM today	06/21/2021 10:00:00	Support Group Members	Jagadeep Vudatha

1 - 1 of 1 items

Deactivate Reminder
Cancel

The screenshot shows the 'Calendar View' for June 2021. The interface includes a sidebar with navigation options like 'My Favorites', 'Incident', 'Request', 'Knowledge', 'Problem', 'Change', and 'Release'. The main calendar area displays a grid of dates from Sunday to Saturday. Several incidents are marked with colored boxes: a purple box for '1:44p SCH-200410-0003' on Thursday, June 10; an orange box for '12p IN-210616-0001' on Wednesday, June 16; and another orange box for '10a IN-210621-0001' on Monday, June 21. A legend at the top right identifies orange as 'Reminder' and purple as 'Scheduled'.

## Deactivate the Reminder

Scheduled reminder can be deactivated with simple following steps.

1. Go to **Action**→**Show Reminders**
2. Select reminder by clicking on checkbox and click on **Deactivate Reminder**
3. Reminder Status will be marked as deactivated.

The 'Show Reminders' dialog box contains a table with the following data:

<input type="checkbox"/>	Notes	Subject	Scheduled Date & Time	Follow Up Type	Set By
<input type="checkbox"/>	Contact user at 10 AM today	Contact user at 10 AM today	06/21/2021 10:00:00	Support Group Members	Jagadeep Vudatha

At the bottom of the dialog, there is a 'Deactivate Reminder' button (highlighted in red) and a 'Cancel' button. The pagination shows '1 - 1 of 1 items'.

## PRINT A INCIDENT

If you want to print an incident ticket, open required incident need to be print,

Go to **Action** menu → Click on **Print**

Tool will display a print preview option. Print will display ticket details, activity log along with resolution details.

Click on **Print**

Edit Incident - IN-210620-0004

Update Action Search Related Items

Ticket Details Activity Log Task (0) Approval (0) Links (0) Schedules (0) More Info Impacted CI (0) Interac

Client Name \* Requestor Name \* Location Cont

Allied Priya Lewis Mahape

Category/Sub Category/Item \* Response Target Reso

SOFTWARE/APPLICATION/SLOWNESS ISSUE 100% 25%

- Add Notes
- Add Attachment
- Send Email
- Set Reminder
- Print
- Copy as New
- New Article

 Print  Cancel

Incident Details			
<b>Number :</b>	IN-210620-0004	<b>Client Name :</b>	Allied
<b>Opened By :</b>	Jagadeep Vudatha	<b>Opened Date :</b>	06/20/2021 17:15:15
<b>Requestor Id :</b>	priya.lewis	<b>Requestor Name :</b>	Priya Lewis
<b>Location :</b>	Mahape	<b>Email :</b>	priya.lewis@allieddigital.net
<b>Mobile :</b>	9876567898	<b>Contact No. :</b>	0802545432
<b>Category :</b>	SOFTWARE	<b>Sub Category :</b>	APPLICATION
<b>Item :</b>	SLOWNESS ISSUE	<b>Status :</b>	OPEN
<b>Impact :</b>	LOW	<b>Urgency :</b>	LOW
<b>Priority :</b>	P4	<b>Channel :</b>	PHONE
<b>Assignment Group :</b>	Service Desk	<b>Technician Name :</b>	
<b>Configuration Item :</b>	ABCABCINESDFCMDBO	<b>Target Resolve Date:</b>	
<b>Alternate Location :</b>		<b>Alternate Contact :</b>	
<b>Vendor Ticket Number :</b>		<b>On Behalf Of :</b>	
<b>NEFCR Description :</b>			
<b>Incident Description :</b>	Application Slowness Issue		
<b>Symptoms :</b>	Application Name - [Enter the application name] Number of Users Impacted - [Enter the number]		

More Info :			
<b>On Site :</b>		<b>1st Response :</b>	
<b>Time To Resolve :</b>		<b>Escalation TS :</b>	
<b>Misroute TS :</b>		<b>Email Response :</b>	
<b>Time To Investigate :</b>		<b>Time To Diagnosis :</b>	

Resolution Details :			
<b>Resolution Method :</b>		<b>Resolution CI :</b>	
<b>Caused By :</b>		<b>Resolution Criteria :</b>	
<b>Resolution Date and Time :</b>		<b>Resolved By :</b>	
<b>Resolution Comments :</b>			

Activity Log :
<b>Email Sent On 06/21/2021 01:15:20 by user = SYSTEM.ADMIN</b>
<b>From :-</b> aditaasusdemo@allieddigital.net <b>To :-</b> jagadeep.vudatha@gmail.com <b>Subject :-</b> Ticket [ IN-210620-0004 ] has been assigned to Service Desk. <b>Event Name :-</b> Business Rule Manager
<b>Attachment added on 06/20/2021 20:18:31 by user = Jagadeep Vudatha</b>
<b>Attachment Name:-</b> New Text Document.txt, Added by user = Jagadeep Vudatha
<b>Attachment added on 06/20/2021 20:17:54 by user = Jagadeep Vudatha</b>
<b>Attachment Name:-</b> Action Items.xlsx, Added by user = Jagadeep Vudatha

## COPY AS NEW

Copy Incident copies the details of an existing incident record to a new incident record. Instead of re-entering all the information for new requestor.

1. Click on **Action** → **Copy as New**
2. Copy As New dialog box will open to enter the **Requestor Name**

Form fields visible: Client Name (Allied), Requestor Name (Priya Lewis), Location (Mahape), Category/Sub Category/Item (SOFTWARE/APPLICATION/SLOWNESS ISSUE), Response Target (100%), Reso (25%).

Requestor Name: Jignesh Sodvadiya  
Jignesh.Sodvadiya | Mahape  
Jignesh.Sodvadiya@allieddigital.net

Requestor Name: Jignesh Sodvadiya

Buttons: Create, Cancel

3. Search and select required **Requestor Name** and Click **Create**.

## QUICK LINKS TO CREATE TICKETS FROM INCIDENT

Following links helps to create other module tickets from incident ticket.

Form fields visible: Client Name (Allied), Requestor Name (Jignesh Sodvadiya), Location (Mahape), Category/Sub Category/Item (SOFTWARE/APPLICATION/SLOWNESS ISSUE), Status (OPEN), Impact (LOW), Urgency (LOW), Channel (PHONE), Assignment Group (Service Desk), Technician Name (Choose one).

Dropdown menu options: Add Notes, Add Attachment, Send Email, Set Reminder, Print, Copy as New, New Article, New Task, New Problem, New Change, New Request, New Approval.

## New Article

Allows to raise an article from incident ticket.

1. Go to **Action** → **New Article**
2. Enter the new article details and click on submit
3. New created article will be linked to incident ticket.

**Create Knowledge Article**



✕

**Client Name \***

**Status \***

**Category/Sub Category/Item \***

**Problem Title \***

**Problem Description \***

Paragraph

**B I**

**Assignment Group \***

**Technician Name**

**Source \***

**Type \***

**Available For \***

**Configuration Item**

**Tags**

**Additional Link**

**Opened By**

**Opened Date**

**Article Image**

No file selected.

Or Drag It Here.

**Solution \***

Paragraph

**B I**



## New Task

Allows to raise a new task ticket from incident ticket.

1. Go to **Action** → **New Task**
2. Enter the new task details and click on submit
3. New created task ticket will be linked to incident ticket.

Add Attachment
Submit
✕

**Client Name \***

**Requestor Name \***

**Task Name \***

**Linked To**

**Status \***

**Assignment Group \***

**Technician Name**

**Opened By**

**Opened Date**

**Due Date**

**Sequence \***

**Task Description \***

**Additional Comments \***

Paragraph

**B I**

Application Name - [Enter the application name]

Number of Users Impacted - [Enter the number]

Submit
Cancel

## New Problem

Allows to raise a new problem ticket from incident ticket.

1. Go to **Action** → **New Problem**
2. Enter the new problem details and click on submit
3. New created problem ticket will be linked to incident ticket.

Add Attachment
Submit
✕

**Client Name \***

**Requestor Name \***

**Location**

**Contact No.**

**Preferred Contact**

**Status \***

**Category/Sub Category/Item \***

**Impact \***

**Urgency \***

**Priority \***

**Assignment Group \***

**Technician Name**

**Configuration Item**

**Channel \***

**Opened By**

**Opened Date**

**Alternate Contact**

**Alternate Location**

**Vendor Ticket Number**

**RCA Date Identified**

**Notification Mode**

**Is Major \***

 No

**Problem Manager**

Submit
Cancel

## New Change

Allows to raise a new change ticket from incident ticket.

1. Go to **Action** → **New Change**
2. Enter the new change details and click on submit
3. New created change ticket will be linked to incident ticket.

Create Change

Add Attachment
Submit
✕

<b>Client Name *</b> <input type="text" value="Allied"/>	<b>Change Initiator *</b> <input type="text" value="Jignesh Sodvadiya"/>	<b>Location *</b> <input type="text" value="Mahape"/>	<b>Status *</b> <input type="text" value="OPEN"/>
<b>Category/Sub Category/Item *</b> <input type="text"/>	<b>Impact *</b> <input type="text" value="LOW"/>	<b>Urgency *</b> <input type="text" value="LOW"/>	
<b>Priority *</b> <input type="text" value="P4"/>	<b>Change Type *</b> <input type="text" value="Choose one"/>	<b>Assignment Group *</b> <input type="text" value="Choose one"/>	<b>Change Owner</b> <input type="text" value="Choose one"/>
<b>Primary CI</b> <input type="text" value="CI-210526-0041"/>	<b>Opened By</b> <input type="text" value="Jagadeep Vudatha"/>	<b>Opened Date</b> <input type="text" value="06/24/2021 13:12:48"/>	

**Short Description \***

**Change Description \***

Paragraph
B I
🔗
☰
☰
☰
☰
🖼️
🗨️
📅
📺
↶
↷

Submit
Cancel

## New Request

Allows to raise a new request ticket from incident ticket.

1. Go to **Action** → **New Request**
2. Enter the new request details and click on submit
3. New created request ticket will be linked to incident ticket.

Create Request

Add Attachment
Submit
✕

<b>Client Name *</b> <input type="text" value="Allied"/>	<b>Requestor Name *</b> <input type="text" value="Jignesh Sodvadiya"/>	<b>Location</b> <input type="text" value="Mahape"/>	<b>Contact No.</b> <input type="text" value="0802567677"/>
<b>Category/Sub Category/Item *</b> <input type="text"/>	<b>Status *</b> <input type="text" value="Choose one"/>	<b>Impact *</b> <input type="text" value="LOW"/>	
<b>Urgency *</b> <input type="text" value="Choose one"/>	<b>Priority *</b> <input type="text" value="Choose one"/>	<b>Channel *</b> <input type="text" value="Choose one"/>	<b>Assignment Group *</b> <input type="text" value="Choose one"/>
<b>Technician Name</b> <input type="text" value="Choose one"/>	<b>Configuration Item</b> <input type="text" value="CI-210526-0041"/>	<b>Alternate Contact</b> <input type="text"/>	<b>Alternate Location</b> <input type="text"/>
<b>Vendor Ticket Number</b> <input type="text"/>	<b>Opened By</b> <input type="text" value="Jagadeep Vudatha"/>	<b>Opened Date</b> <input type="text" value="06/24/2021 13:16:41"/>	

**Short Description \***

Submit
Cancel

## New Approval

Allows to raise an approval ticket from incident ticket.

1. Go to **Action** → **New Approval**
2. Enter the new approval ticket details and click on submit
3. New created approval ticket will be linked to incident ticket.

## INCIDENT ACTIVITY LOG

**Activity log** captures all actions performed on ticket from ticket creation to closure with date/time stamp along with agent id. All modification performed on ticket is auto captured. Activity log helps to determined order in which activities are performed on the ticket. From the creation of ticket to resolution all activities are captured with order. All activities like add notes, add attachment, setting a reminder, creating task, creating approvals, linking tickets, linking CI's all activities are capture in activity log with sequence

**Filter** option at the top provides a facility to search for specific activity log or activity log of record for specific duration.

**Activity Type** displays list activities in drop down list. On selecting specific activity type activity log displays logs accordingly.

**Log Title** allows to enter relevant keyword in given test field, depend on keyword displays the activity log

**From** and **To date** allows to find activity log for specific duration

Edit Incident - IN-210621-0001

Update Action Search Related Items

Ticket Details Activity Log Task (0) Approval (0) Links (0) Schedules (0) More Info Impacted CI (0) Interaction (0) Resolution

**Filter**

Activity Type: -- All -- Log Title: Type to search From Date: month/day/year hours: minut ... To Date: month/day/year hours: minut ...

» Detailed Activity Log

**Reminder Set On 06/21/2021 05:38:12 by user = Jagadeep Vudatha**

Subject:- Contact user at 10 AM today  
Comments : Contact user at 10 AM today  
by user :- Jagadeep Vudatha  
Remind Time - 06/21/2021 10:00:00  
Reminder Sent To :- jagadeep.vudatha@gmail.com ;

**Note:** Logs in the tool protected from alteration after-the-fact.

### TASK

Agent can create a new Task and link to incident or open any existing tasks and can link to incident. Incident ticket cannot be resolved until all linked tasks are closed.

**Create New-** Click on **Task** → **Create New** to create a new Task.

Edit Incident - IN-210621-0001

Update Action Search Related Items

Ticket Details Activity Log **Task (1)** Approval (0) Links (0) Schedules (0) More Info Impacted CI (0) Interaction (0) Resolution

» Current Tasks Create New Link Existing Task Detach Task

Task ID	Approval ID	Task Name	Requestor Name	Assignment Group	Status	Sequence
<a href="#">I-210617-0003</a>		Check Network Status	Jagadeep Vudatha	Network Support	OPEN	2

### Create Task Add Attachment Submit X

Client Name * <input type="text" value="Allied"/>	Requestor Name * <input type="text" value="Jignesh Sodvadiya"/>	Task Name * <input type="text"/>	Linked To <input type="text" value="IN-210621-0001"/>
Status * <input type="text" value="OPEN"/>	Assignment Group * <input type="text" value="Choose one"/>	Technician Name <input type="text" value="Choose one"/>	Opened By <input type="text" value="Jagadeep Vudatha"/>
Opened Date <input type="text" value="06/21/2021 06:21:40"/>	Due Date <input type="text" value="month/day/year hours: minu ..."/>	Sequence * <input type="text" value="3"/>	

Task Description \*

Additional Comments \*  

Paragraph **B** *I*

Application Name - [Enter the application name]

Number of Users Impacted - [Enter the number]

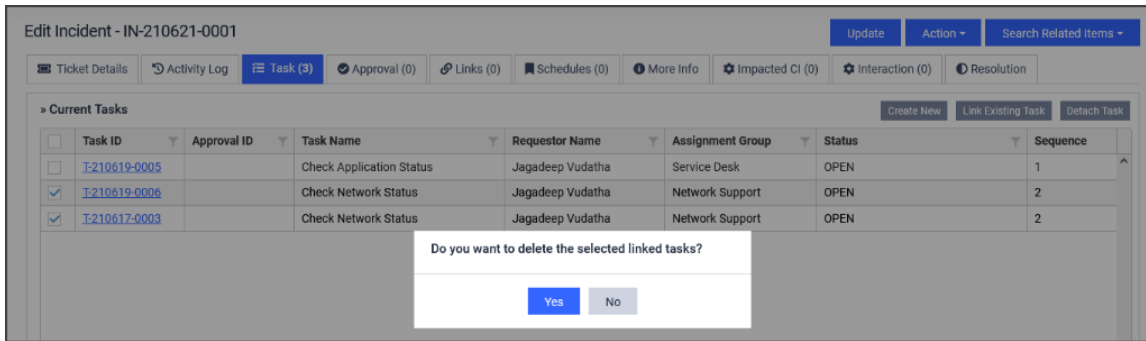
**Link Existing Task-** To link existing link Tasks, click on **Task → Link Existing Task**  
 Displays list of existing Tasks. Agent can link one or more tasks to incident by clicking on checkboxes.

### Link To Search X

<input type="checkbox"/>	ID	Title	Requestor Name	Assignment Group	Technician Name	Status	Sequence	Opened Date
<input type="checkbox"/>	T-210620-0006	Check Network Status	Priya Lewis	Network Support		OPEN	2	06/20/2021 17:1
<input type="checkbox"/>	T-210620-0005	Check Application Status	Priya Lewis	Service Desk		OPEN	1	06/20/2021 17:1
<input type="checkbox"/>	T-210620-0004	Check database status	Priya Lewis	Server Support		OPEN	1	06/20/2021 17:1
<input type="checkbox"/>	T-210619-0006	Check Network Status	Jagadeep Vudatha	Network Support		OPEN	2	06/19/2021 10:3
<input type="checkbox"/>	T-210619-0005	Check Application Status	Jagadeep Vudatha	Service Desk		OPEN	1	06/19/2021 10:3
<input type="checkbox"/>	T-210619-0004	Check database status	Jagadeep Vudatha	Server Support		OPEN	1	06/19/2021 10:3
<input type="checkbox"/>	T-210619-0003	Check network connection	Priya Lewis	Service Desk		OPEN	2	06/19/2021 06:3
<input type="checkbox"/>	T-210619-0002	Check user machine configuration	Priya Lewis	Service Desk		OPEN	1	06/19/2021 06:3
<input type="checkbox"/>	T-210619-0001	Check MS OFFICE software	Priya Lewis	Service Desk		OPEN	1	06/19/2021 06:3
<input type="checkbox"/>	T-210617-0002	Check Application Status	Jagadeep Vudatha	Service Desk		OPEN	1	06/18/2021 01:5

1 - 10 of 18 items

**Detach Task-** Select respective Task by clicking on checkbox and click on **'Detach Task'** to unlink it.



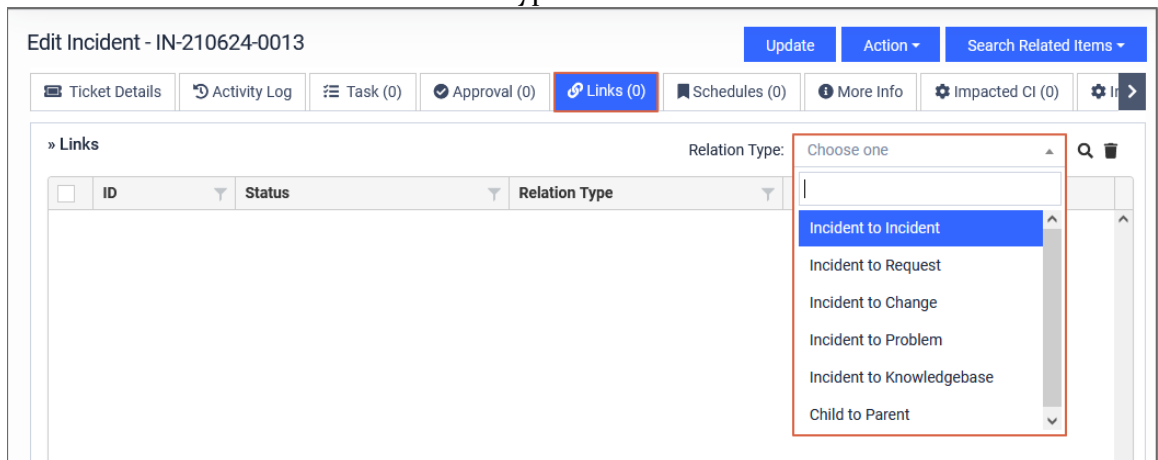
## LINKING TICKETS

This tab allows agents to create relationships by linking incidents to other tickets in system.

Options Available:

**Incident to Incident:** Incident can be linked to other incident

1. Navigate to incident module
2. Open a relevant incident ticket in edit mode
3. Move to **Links** tab and select Relation Type as **'Incident to Incident'**




Link To Search  ✕

<input type="checkbox"/>	ID	Title	Status	Assignment Group	Category
<input type="checkbox"/>	IN-210624-0014	Test Mail to check Email Notificatio...	OPEN	Service Desk	PHONE
<input type="checkbox"/>	IN-210624-0005	HARDWARE / LAPTOP / LENOVO- X...	OPEN	Service Desk	HARDWARE
<input type="checkbox"/>	IN-210624-0004	HARDWARE / LAPTOP / LENOVO- X...	OPEN	Service Desk	HARDWARE
<input type="checkbox"/>	IN-210623-0004	Test Mail to check Email Notificatio...	OPEN	Service Desk	PHONE
<input type="checkbox"/>	IN-210623-0003	web conference not connecting	OPEN	Server Support L2	SOFTWARE
<input type="checkbox"/>	IN-210622-0027	Server Printer not working	OPEN	Server Support	HARDWARE
<input type="checkbox"/>	IN-210622-0026	Application Slowness Issue, Applic...	OPEN	Server Support L2	SOFTWARE
<input type="checkbox"/>	IN-210622-0025	Test Mail to check Email Notificatio...	OPEN	Service Desk	PHONE
<input type="checkbox"/>	IN-210622-0024	Test Mail to check Email Notificatio...	OPEN	Service Desk	PHONE
<input type="checkbox"/>	IN-210622-0023	Test Mail to check Email Notificatio...	OPEN	Service Desk	PHONE

1 - 10 of 1293 items

[Link](#) [Cancel](#)

4. Click on  icon, which will display all open Incidents in a pop-up box. Agent can select incidents and attach to incident.
5. Click on Link
6. Linked ticket will be visible on Links tab.

**Incident to Request:** Incident can be linked to Request ticket

1. Navigate to incident module
2. Open a relevant incident ticket in edit mode
3. Move to **Links** tab and select Relation Type as **'Incident to Request'**

Edit Incident - IN-210624-0013 Update Action Search Related Items

Ticket Details Activity Log Task (0) Approval (0) **Links (0)** Schedules (0) More Info Impacted CI (0) ⚙️

» Links Relation Type: Choose one

<input type="checkbox"/>	ID	Status	Relation Type
<input type="checkbox"/>			

Incident to Incident

Incident to Request

Incident to Change

Incident to Problem

Incident to Knowledgebase


Child to Parent

Link To [search] X

<input type="checkbox"/>	ID	Title	Status	Assignment Group	Category
<input type="checkbox"/>	R-210623-0022	Request for Guest WiFi access	OPEN	Service Desk	SOFTWARE
<input type="checkbox"/>	R-210623-0021	Request for Guest WiFi access	OPEN	Service Desk	SOFTWARE
<input type="checkbox"/>	R-210623-0020	Request for VPN	OPEN	Service Desk	SOFTWARE
<input type="checkbox"/>	R-210623-0019	Request for VPN	OPEN	Service Desk	SOFTWARE
<input type="checkbox"/>	R-210623-0018	Request for VPN	OPEN	Service Desk	SOFTWARE
<input type="checkbox"/>	R-210623-0017	Request for Guest WiFi access	OPEN	Service Desk	SOFTWARE
<input type="checkbox"/>	R-210623-0016	Request for Guest WiFi access	OPEN	Service Desk	SOFTWARE
<input type="checkbox"/>	R-210623-0015	Request for Guest WiFi access	OPEN	Service Desk	SOFTWARE
<input type="checkbox"/>	R-210623-0014	Request for VPN	OPEN	Service Desk	SOFTWARE
<input type="checkbox"/>	R-210623-0013	Request for VPN	OPEN	Service Desk	SOFTWARE

< 1 2 3 4 5 ... 1 - 10 of 709 items

[Link](#) [Cancel](#)

4. Click on  icon, which will display all open requests in a pop-up box. Agent can select requests and attach to incident.
5. Click on Link
6. Linked ticket will be visible on Links tab.

**Incident to Change:** Incident can be linked to Change ticket

1. Navigate to incident module
2. Open a relevant incident ticket in edit mode
3. Move to **Links** tab and select Relation Type as **'Incident to Change'**

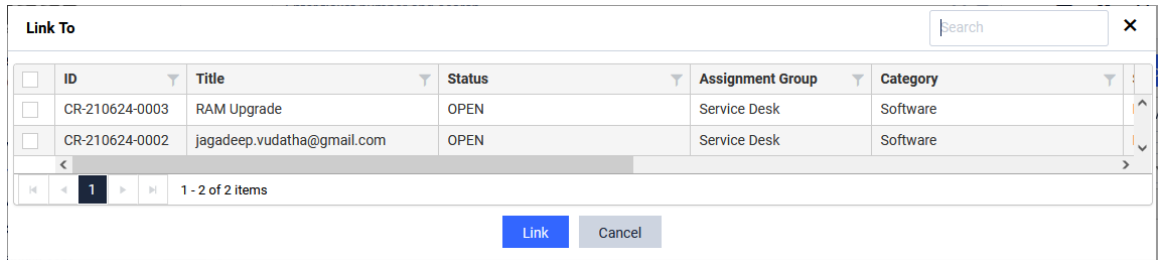
Edit Incident - IN-210624-0013 [Update](#) [Action](#) [Search Related Items](#)


Ticket Details [Activity Log](#) [Task \(0\)](#) [Approval \(0\)](#) **[Links \(0\)](#)** [Schedules \(0\)](#) [More Info](#) [Impacted CI \(0\)](#) [Settings](#)

» Links Relation Type: Choose one

<input type="checkbox"/>	ID	Status	Relation Type
<div style="border: 1px solid red; padding: 5px;"> <ul style="list-style-type: none"> <li style="background-color: #007bff; color: white; padding: 2px;">Incident to Incident</li> <li>Incident to Request</li> <li>Incident to Change</li> <li>Incident to Problem</li> <li>Incident to Knowledgebase</li> <li>Child to Parent</li> </ul> </div>			

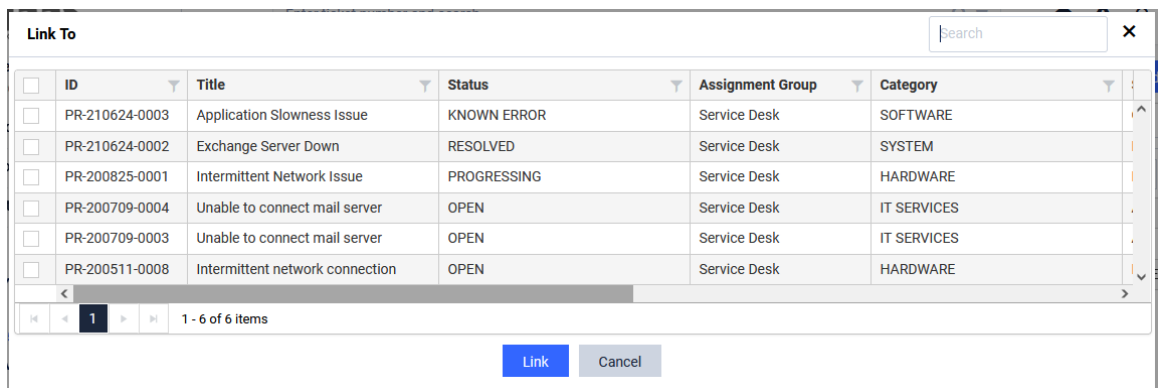
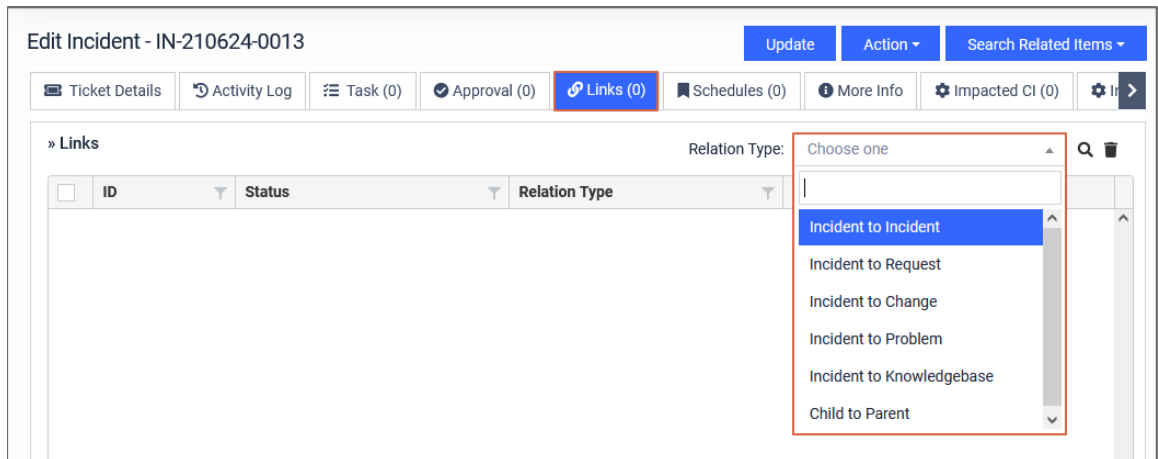




4. Click on  icon, which will display all open changes in a pop-up box. Agent can select changes and attach to incident.
5. Click on Link
6. Linked ticket will be visible on Links tab.

**Incident to Problem:** Incident can be linked to Problem ticket

1. Navigate to incident module
2. Open a relevant incident ticket in edit mode
3. Move to **Links** tab and select Relation Type as **'Incident to Problem'**




4. Click on  icon, which will display all open problems in a pop-up box. Agent can select problems and attach to incident.

5. Click on Link
6. Linked ticket will be visible on Links tab.

### Incident to Knowledgebase: Incident can be linked to Knowledge Article

1. Navigate to incident module
2. Open a relevant incident ticket in edit mode
3. Move to **Links** tab and select Relation Type as **'Incident to Knowledgebase'**

ID	Title	Status	Assignment Group	Category
KB-210614-0001	Unable to Sign PDF	LIVE	Service Desk	SYSTEM
KB-200618-0001	Problem title Asrsh	LIVE	Application Support	IT SERVICES
KB-200617-0001	PROBLEM TITLE	LIVE	Application Support	IT SERVICES
KB-200616-0010	How to stop the client from installing	LIVE	Service Desk	SOFTWARE
KB-200616-0001	Printer/Scanning - HP Printer/Scan...	LIVE	Service Desk	HARDWARE

4. Click on  icon, which will display all open articles in a pop-up box. Agent can select articles and attach to incident.
5. Click on Link
6. Linked article will be visible on Links tab.

### Parent to Child

When there is a P1 incident occurs, there are usually multiple incidents created for the same issue. All the incidents for a single issue can be associated with the appropriate P1/ Parent incident.

1. Navigate to Incident Module
2. Open associated P1/ Parent incident to which child incidents need to be added.
3. Click on **Links**
4. Select **'Parent To Child'** and click on magnifying glass.

5. List of child incidents will be displayed.
6. Click on checkbox to link child incident to parent incident. List will display all open incidents except P1 incidents.
7. By multi-selecting the checkbox, multiple child incidents can be linked to Parent incident.
8. Click on Submit.
9. All selected incidents will be attached to the parent ticket and displayed in Link tab.

### Child to Parent

Similar to adding child incidents from parent incident, a parent incident also can be link to child incident from child incident itself.

1. Navigate to Incident module
2. Select the child incident (other than P1 tickets) that need to be associated with a P1/ Parent incident
3. Click on Additional Informational → **Links**
4. Select '**Child To Parent**' and click on magnifying glass.
5. All open P1 incidents displayed.
6. Click on respective P1/ Parent Ticket.
7. Child ticket can be linked to single parent ticket
8. Linked parent ticket will be displayed in Links Tab.

On Resolving the parent incident, automatically resolves the child incidents that are linked to it with the parent incident resolution details.

**Detach Linked Ticket-** The agent can detach a linked incident or any other ticket by selecting a ticket and clicking on the  Delete button.

### APPROVALS

If a ticket requires formal approval before proceeding the case, Agent can create an approval manually by clicking on **Approval** → **Create New**.

Enter all \* marked following mandatory fields.



Approval (0)

Approval ID	Status	Comments	Sequence Of	Approval Group	Approver

### Create Approval

Add Attachment Submit ✕

Approval For:  Status:  Approval Group:  Approver:

Submitted Date:  Sequence Of:

Comments:

Paragraph ⌵ **B** *I*

Submit Cancel

On submitting a request for approval, approver will receive an approval mail with a link to approve or reject the request.

### Edit Approval - AP-210621-0001

Add Attachment ✕

Approval For:  Status:  Approval Group:  Approver:

Submitted Date:  Sequence Of:

Approver Comments:

Paragraph ⌵ **B** *I*

Comments:

Paragraph ⌵ **B** *I*

Kindly approve request

Approve Reject Update Cancel

All linked approvals will visible under Approval Tab. If the logged in user is a managerial user, then he can open the approval and click on **Approve** or **Reject**.

To detach any approval, click on 'Detach Approval'.

Incident will be non-editable and cannot be resolved until all approvals are approved.

### Edit Incident - IN-210621-0001

Action

Ticket Details Activity Log Task (3) Approval (1) Links (3) Schedules (0) More Info Impacted CI (0) Interaction (0) Resolution

» Approval Create New Detach Approval

Approval ID	Status	Comments	Sequence Of	Approval Group	Approver
<a href="#">AP-210621-0001</a>	OPEN	Kindly approve request	1	Regional Approval Group	Jagadeep Vuda

## MORE INFO

Tab provides information regarding onsite visits and Escalations.

Edit Incident - IN-210621-0001

Ticket Details | Activity Log | Task (3) | Approval (1) | Links (3) | Schedules (0) | **More Info** | Impacted CI (0) | Interaction (0) | Resolution

**More Info**

Additional Information

On Site: Select value

1st Response: Select value

Time To Resolve: Select value

Escalation TS: Select value

Misroute TS: Select value

Email Response: Select value

Time To Investigate: Select value

Time To Diagnosis: Select value

## IMPACTED CI

Related configuration items can be added under 'Impacted CI' tab.

Edit Incident - IN-210621-0001

Ticket Details | Activity Log | Task (0) | Approval (0) | Links (3) | Schedules (0) | More Info | **Impacted CI (2)** | Interaction (0) | Resolution

**Impacted CI**

ID	Name	Type	Serial No.	Model No.	Vendor Name
CI-210605-0001	Canon Pixma G3000	Network Printer	S767676		
CI-210610-0002	DDCP-CHFD4	Desktop	A92928		

**Add New**- Allows to create a new CI and link to incident.

Create New CI

Client Name \* Allied | Requestor Name \* Jignesh Sodvadiya | Location \* Mahape | Contact No. 0802567677

CI Name \* | CI Type \* Choose one | Status \* OPEN

Assignment Group \* Choose one | Technician Name Choose one | Alternate Location Choose one | Alternate Contact

Short Description

Additional Comments

**Link Existing CI**- On clicking link existing CI, displays all available CI and agent can select related CI and link to incident.

**Link To** X

CI Type \* Search Text

(All) Search Search

<input type="checkbox"/>	ID	Name	Type	Requestor Name	Vendor Name	Serial Number	Model No.	Client	Created By
<input type="checkbox"/>	CI-210610-0001	Desktop CI	Desktop	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210605-0001	LAP-090909	Laptop CI	Jagadeep Vudatha				Allied	Jagadeep Vudatha
<input type="checkbox"/>	CI-210526-0041	ABCABCINESDFCMDB0	Server	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210526-0040	ABCABCUSESUPWEB04	Server	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210526-0039	ABCABCINESDFITSM0	Server	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210526-0038	ABCABCUSESUPWEB03	Server	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210526-0037	ABCABCUSESUPWEB05	Server	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210526-0036	ABCABCUSESUPWEB06	Server	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210526-0035	ABCABCUSESUPDEV01	Server	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210526-0034	ABCABCUSESUPWEB07	Server	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210526-0033	ABCABCUSESUPWEB01	Server	SYSTEM.ADMIN				Allied	

1 - 25 of 52 items

Link Cancel

**Detach CI**- Linked CI can be detached by clicking on **'Detach CI'**.

**Impacted CI** Add New Link Existing CI Detach CI

<input type="checkbox"/>	ID	Name	Type	Serial No.	Model No.	Vendor Name
<input type="checkbox"/>	CI-210606-0001	Canon Pixma G3000	Network Printer	S767676		
<input checked="" type="checkbox"/>	CI-210610-0002	DDCP-CHFD4	Desktop	A92928		

Do you want to delete the selected linked CI's?

Yes No

## INCIDENT RESOLUTION

- The resolution tab fields will be enabled once **RESOLVED** has been selected from the status dropdown.
- The agent need to specify **Resolution Method**, **Resolution Criteria** and **Caused By** from the dropdown.
- If ticket SLA is breached then it is mandatory to enter reason for SLA breach.
- Click on Create KB checkbox if new article needs to be created based on resolved incident.
- Click Update and enter resolution comments.

Edit Incident - IN-210620-0004

Update Action Search Related Items View Attachment(s)

Ticket Details Activity Log Task (0) Approval (0) Links (1) Schedules (0) More Info Impacted CI (0) Interaction (0) Resolution

» Resolution

Resolution Method: Choose one  
Resolution Criteria: Choose one  
Caused By: Choose one  
Resolution CI: Choose one

Resolved By: Jagadeep Vudatha  
Resolution Date Identified:   
Resolution Date and Time: 06/21/2021 06:48:12  Create KB Article

Enter Reason for SLA Breach:

Watch List Email Id: Add Email Ids

Resolution Comments: Paragraph **B** *I* @ : = < > <img alt="Rich text editor icons" data-bbox="380 315 500 330"/>

### VIEW SUBMITTED SURVEY

Go to respective incident record and click on survey button to view the submitted survey.

ADiTaaS CONQUERING COMPLEXITY

Jagadeep Vudatha Practice Manager

Enter ticket number and search...

Edit Incident - IN-210426-0001

Survey Update Action Search Related Items

Ticket Details Activity Log Task (0) Approval (0) Links (0) Schedules (0) More Info Impacted CI (0)

Client Name: Allied  
Requestor Name: Robert B  
Location: Mahape  
Contact No.: 6456546

ADiTaaS CONQUERING COMPLEXITY

Incident Survey form

Ticket ID	Created On	Resolved On	Resolved By
IN-210426-0001	04/26/2021 17:05:34	04/26/2021 17:08:03	Jagadeep Vudatha
Submitted On	Submitted By		
04/26/2021 17:36:07	Sam R		

- Overall quality of Remote support \*  
★★★★★ 5/5
- Knowledge and professionalism of the Remote support staff \*  
 Very satisfied  Satisfied  Average  Dissatisfied  Very dissatisfied
- Communication and follow-up on problem resolution  
 Very satisfied  Satisfied  Average  Dissatisfied  Very Dissatisfied
- The ability of help desk to diagnose your problem \*  
★★★★★ 5/5

### VIEW SURVEY REPORTS

- Go to **Report Catalog** module from main menu and navigate to **Survey Reports** widget.
- Click on **Survey Reports** to view the survey analysis.

**Survey Report**

Action ▾ 50 Search

ID	Contact Name	Opened On	Survey Rating	Category	Sub Category	Item	Resolved On	Resolved By	Submitted On
IN-210625-0006	Jagadeep Vudatha	06/25/2021 09:55:23	4	SOFTWARE	OUTLOOK	UNABLE TO SEND MAILS	06/25/2021 09:55:07	Jagadeep Vudatha	06/25/2021 10:05:07
IN-210625-0006	Jagadeep Vudatha	06/25/2021 09:55:23	5	SOFTWARE	OUTLOOK	UNABLE TO SEND MAILS	06/25/2021 09:55:07	Jagadeep Vudatha	06/25/2021 10:05:07
IN-210625-0006	Jagadeep Vudatha	06/25/2021 09:55:23	5	SOFTWARE	OUTLOOK	UNABLE TO SEND MAILS	06/25/2021 09:55:07	Jagadeep Vudatha	06/25/2021 10:05:07
IN-210625-0006	Jagadeep Vudatha	06/25/2021 09:55:23	5	SOFTWARE	OUTLOOK	UNABLE TO SEND MAILS	06/25/2021 09:55:07	Jagadeep Vudatha	06/25/2021 10:05:07
IN-210625-0006	Jagadeep Vudatha	06/25/2021 09:55:23	5	SOFTWARE	OUTLOOK	UNABLE TO SEND MAILS	06/25/2021 09:55:07	Jagadeep Vudatha	06/25/2021 10:05:07
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	5	HARDWARE	LAPTOP	LENOVO- X1 YOGA	N/A	N/A	10/12/2020 16:15:07
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	2	HARDWARE	LAPTOP	LENOVO- X1 YOGA	N/A	N/A	10/12/2020 16:15:07
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	5	HARDWARE	LAPTOP	LENOVO- X1 YOGA	N/A	N/A	10/12/2020 16:15:07
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	5	HARDWARE	LAPTOP	LENOVO- X1 YOGA	N/A	N/A	10/12/2020 16:15:07
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	2	HARDWARE	LAPTOP	LENOVO- X1 YOGA	N/A	N/A	10/12/2020 16:15:07
IN-210609-0013	Jagadeep Vudatha	06/09/2021 10:23:57	4	HARDWARE	PERIPHERALS AND COMPONENTS	PRIVACY SCREEN REQUEST	06/09/2021 10:23:33	Jagadeep Vudatha	06/09/2021 12:05:07
IN-210609-0013	Jagadeep Vudatha	06/09/2021 10:23:57	5	HARDWARE	PERIPHERALS AND COMPONENTS	PRIVACY SCREEN REQUEST	06/09/2021 10:23:33	Jagadeep Vudatha	06/09/2021 12:05:07
IN-210609-0013	Jagadeep Vudatha	06/09/2021 10:23:57	4	HARDWARE	PERIPHERALS AND COMPONENTS	PRIVACY SCREEN REQUEST	06/09/2021 10:23:33	Jagadeep Vudatha	06/09/2021 12:05:07
IN-210609-0013	Jagadeep Vudatha	06/09/2021 10:23:57	5	HARDWARE	PERIPHERALS AND COMPONENTS	PRIVACY SCREEN REQUEST	06/09/2021 10:23:33	Jagadeep Vudatha	06/09/2021 12:05:07
IN-210609-0013	Jagadeep Vudatha	06/09/2021 10:23:57	5	HARDWARE	PERIPHERALS AND COMPONENTS	PRIVACY SCREEN REQUEST	06/09/2021 10:23:33	Jagadeep Vudatha	06/09/2021 12:05:07

Count: 75

1 2 1 - 50 of 75 items

## CHANGE INCIDENT STATUS

To change the status

1. Open the incident record in edit mode
2. From the drop down menu of the Status field, select the required status.



**Status \***

APPROVED

PEND 3rd PARTY

UNDER OBSERVATION

REJECTED

RESOLVED

CLOSED

APPROVED

3. Upon selecting the status, tool will prompt to enter reason for status change.
4. Click on Submit.

**Reason for status change**

Watch List Email Id

Add Email Ids

Paragraph

**B** *I* [Link](#) [List](#) [List](#) [Image](#) [Table](#) [Undo](#) [Redo](#)

Submit Cancel

Below are the available statuses for incident record

- ❖ **'OPEN'**: "This status is the default assignment value for all newly created incident, before they are assigned to a support group or individual for action".
- ❖ **'PROGRESSING'**: "Change to this status, when you begin work on the Incident".
- ❖ **'PEND 3RDPARTY'**: "Some type of action or information is required from a third party vendor".
- ❖ **'PEND CLIENT'**: "Some type of action or information is required from the end-client or contact".
- ❖ **'REJECTED'**: "Change to this status if work on the incident is false or duplicate record".
- ❖ **'UNDER OBSERVATION'**: "The Incident is ongoing issue and must be analyzed before further action can take place".
- ❖ **'ASSIGNED'** – "When incident record is assigned to a support group or individual for action".
- ❖ **'APPROVED'** – "When approver has approved the approval record".

- ❖ **'RESOLVED'**: "Change to this status when you have to resolve the Incident".
- ❖ **'CLOSED'**- Change to this status when you have to close the Incident

Incident record can also auto close after defined period mentioned in notification rule engine

### VIEW CI DETAILS FROM INCIDENT PAGE

Displays CI details, related tickets, CI history and graphical view of CI relationship. If any specific CI is linked to other CI then relationship will be displayed in next level.

**ADCP-CHFD2\_D (CI-210526-0011) Details**

CI's Details | **CI's Related Tickets (3)** | CI's History | Relationship Graph

ID	Status	Requestor Name	Assignment Group	Technician Name	Category	Sub Category	Item	Priority
<a href="#">IN-210625-0001</a>	OPEN	Priya Lewis	Network Support L2		HARDWARE	LAPTOP	LENOVO- X1 YOGA	P4
<a href="#">PR-210603-0001</a>	OPEN	Jagadeep Vudatha	Service Desk		SYSTEM	MONITORING	ALERT	P4
<a href="#">PR-210525-0001</a>	CLOSED	Deepak Shukla	Service Desk		SYSTEM	MONITORING	ALERT	P1

1 - 3 of 3 items

- CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**

CI Name :- ABCABCUSESUPWEB04 (CI-210526-0040) is attached with this CI
- CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**

CI Name :- ABCABCINESDFCMDB0 (CI-210526-0041) is attached with this CI
- CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**


CI Name :- Canon Pixma G3000 (CI-210606-0001) is attached with this CI
- CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**

CI Name :- Desktop CI (CI-210610-0001) is attached with this CI
- CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**

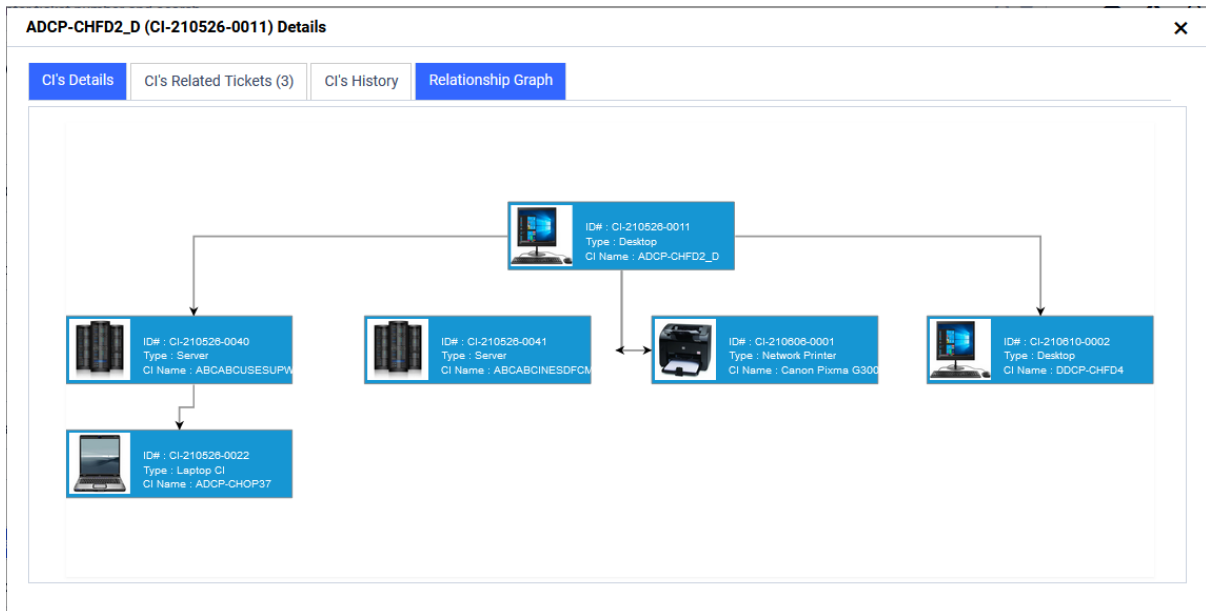
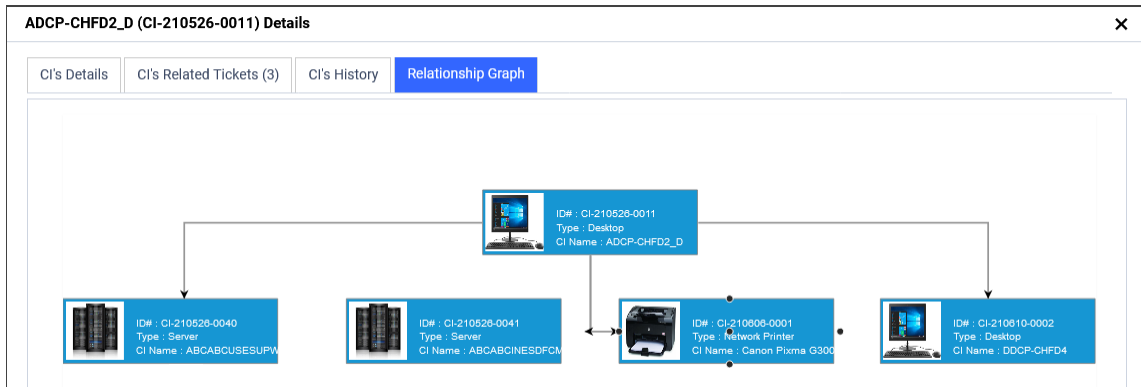
CI Name :- DDCP-CHFD4 (CI-210610-0002) is attached with this CI

**ADCP-CHFD2\_D (CI-210526-0011) Details**

CI's Details | CI's Related Tickets (3) | CI's History | **Relationship Graph**



ID# : CI-210526-0011  
Type : Desktop  
CI Name : ADCP-CHFD2\_D



## VIEW SLA INFORMATION

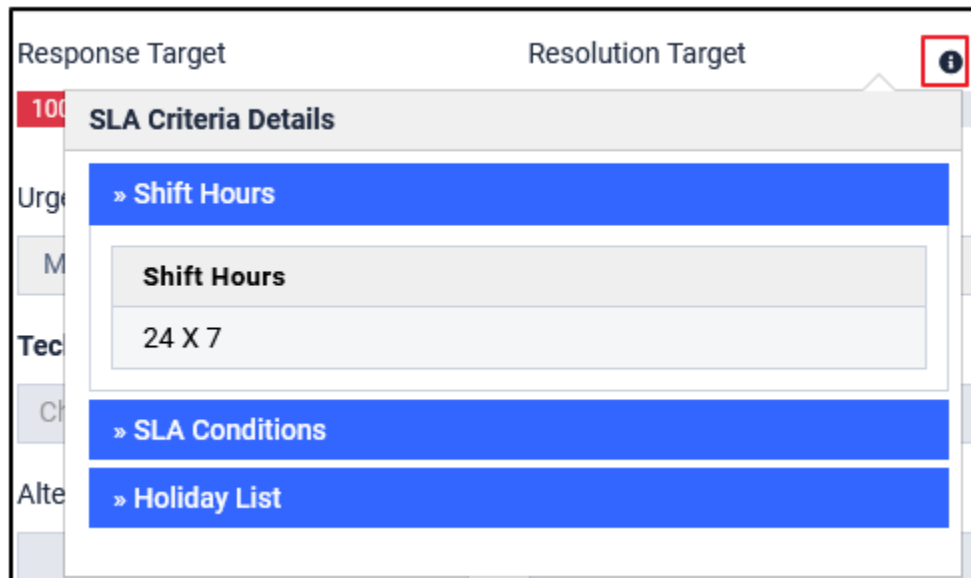
(**i**) icon beside the priority displays information regarding assigned Priority.



Priority Details
<p><b>Response Time</b> 10</p> <p><b>Resolution Time</b> 20</p> <p><b>Priority Definition</b></p>

There are two graphical bar provided in tool to get a graphical view of SLA. **Response Target** and **Resolution Target** bar.

(  ) icon placed next Resolution Target bar displays SLA criteria details.



The screenshot shows a dialog box titled "SLA Criteria Details" with a red "100" status indicator. It contains three expandable sections: "Shift Hours" (showing "24 X 7"), "SLA Conditions", and "Holiday List". An information icon (i) is highlighted in a red box in the top right corner of the dialog.

On mouse over SLA bar, SLA information displays with elapsed time and SLA status.

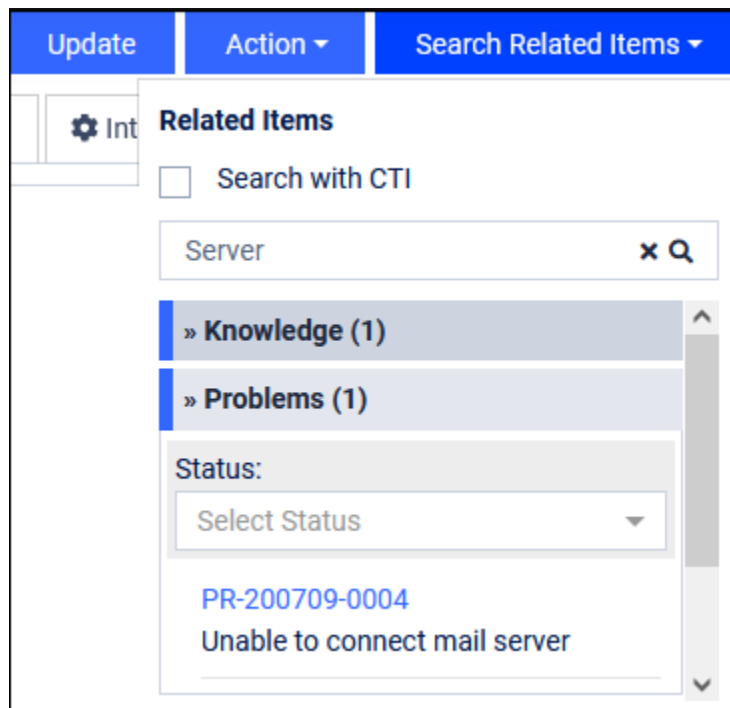
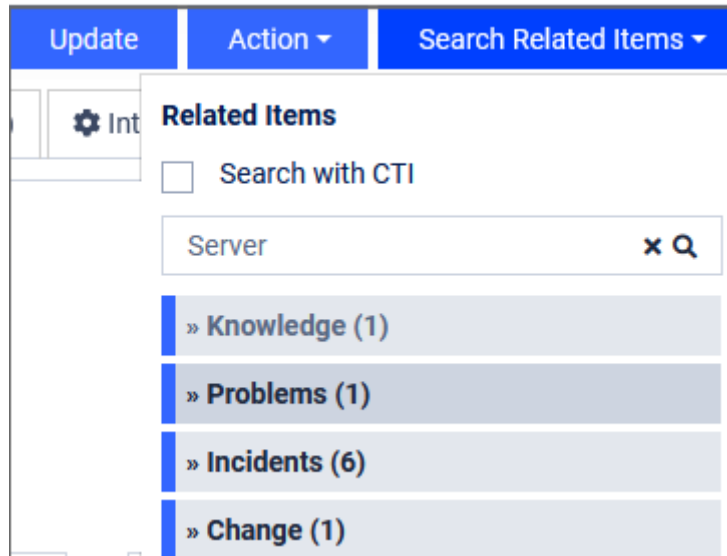
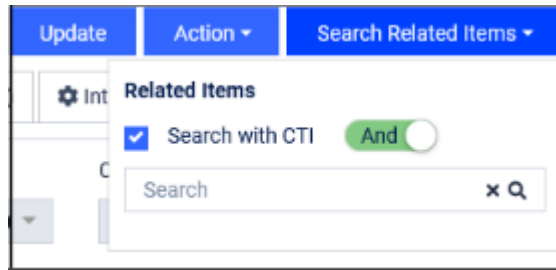
<p><b>Response Target</b></p> <p>100%</p> <p>Urgency *</p> <p>MEDIUM</p> <p>Technician Name</p> <p>Choose one</p> <p>Alternate Contact</p> <p>Notification Mode</p>	<p><b>Resolution Target</b></p> <p>32%</p> <p><b>SLA for Resolution</b></p> <p>SLA Target (min) 550</p> <p>SLA Actual Elapsed Time (min) 181</p> <p>SLA Status <b>ACHIEVED</b></p> <p>SLA Start Time 06/19/2021 06:39:59</p> <p>SLA Target Time 06/19/2021 15:49:06</p> <p>SLA End Time 06/19/2021 09:41:26</p>
---	---

### SEARCH RELATED ITEMS

Agents can quickly search for any related tickets or knowledge article from create/ edit screen by clicking on search related items. By default search results display based on ticket title, agent has provision to search with any keyword as well as by clicking on CTI checkbox results will display matching to CTI's.

1. Click on create new or open a relevant ticket in edit mode
2. Click on **Search Related Items**
3. Type a keyword in given text field and click on search icon
4. Displays a results according to the keyword
5. Click on required ticket / knowledge article
6. On clicking ticket or article will be open in new pop up
7. Click on **Link**
8. Linked ticket / article will be visible in **Links** tab.





**Edit Problem - PR-200709-0004** Link

Ticket Details | Activity Log | Task (0) | Approval (0) | Links (0) | Known Error | Impacted CI (0) | Problem Closure

<b>Client Name *</b> Allied	<b>Requestor Name *</b> Priya Lewis	<b>Location</b> Mahape	<b>Contact No.</b> 0802545432
<b>Preferred Contact</b> Choose one	<b>Status *</b> OPEN	<b>Response Target</b> 0%	<b>Resolution Target</b> 0%
<b>Category/Sub Category/Item *</b> IT SERVICES/AUDIO/VIDEO/SETUP VIDEO CONFERENCE		<b>Impact *</b> LOW	<b>Urgency *</b> LOW
<b>Priority *</b> P4	<b>Assignment Group *</b> Service Desk	<b>Technician Name</b> Choose one	<b>Configuration Item</b> Choose one
<b>Channel *</b> CHANGE	<b>Opened By</b> Jagadeep Vudatha	<b>Opened Date</b> 07/09/2020 11:58:42	<b>Alternate Contact</b>

## Data grid Actions

Action in tab in data grids provides a multiple features to update multiple tickets at a time.

Jagadeep Vudatha  
Practice Manager

My Group Work

	ID	Title	Desc	Action	Requestor Name	Status	Assignmer
<input type="checkbox"/>	IN-210620-0004	Application Slowness Issue	Appli	Add Notes	Priya Lewis	OPEN	Service De
<input type="checkbox"/>	IN-210620-0002	Browser Compatibility Issue	Desc	Add Attachment	Priya Lewis	OPEN	Service De
<input type="checkbox"/>	IN-210619-0020	Desktop not working	Deskt	Update	Edwin Toh	PROGRESSING	Service De
<input type="checkbox"/>	IN-210619-0019	Outlook   User continues to get pro...	Outlo	Merge	Jagadeep Vudatha <span>VIP</span>	OPEN	Service De
<input type="checkbox"/>	IN-210619-0004	Application Slowness Issue	Appli	Set Reminder	Jagadeep Vudatha <span>VIP</span>	OPEN	Service De
<input type="checkbox"/>	IN-210619-0003	SYSTEM / MONITORING / ALERT	SYST	Resolve	Jagadeep Vudatha <span>VIP</span>	OPEN	Service De
<input type="checkbox"/>	IN-210619-0001	Desktop not working	Deskt	Export To Excel	Jagadeep Vudatha <span>VIP</span>	OPEN	Service De
<input type="checkbox"/>	IN-210618-0009	Account is locked..	Account	Refresh	Priya Lewis	PROGRESSING	Service De
<input type="checkbox"/>	IN-210618-0007	My Ad account locked	From: Sodvadiya, Jignesh "...	Reset Grid State	Jignesh Sodvadiya	OPEN	Service De

## BULK ADD NOTES

Action in tab in data grids provides a feature to add notes on multiple tickets at a time.

1. Select tickets from same module by clicking on checkbox placed beside the ticket id
2. Click on **Action** button
3. Select 'Add Notes' action item, Enter the Notes.
4. Click on Add Notes

All selected tickets will updated with added notes.

## BULK ADD ATTACHMENT

Action in tab in data grids provides a feature to add attachments on multiple tickets at a time.

1. Select tickets from same module by clicking on checkbox placed beside the ticket id
2. Click on **Action** button
3. Select 'Add Attachment' action item, click on browse to upload attachment



All selected tickets will updated with added attachments

### BULK ADD REMINDER

Action in tab in data grids provides a feature to add reminders on multiple tickets at a time.

1. Select tickets from same module by clicking on checkbox placed beside the ticket id
2. Click on **Action** button
3. Select '**Set Reminder**' action item, Enter the details.
4. Click on Submit

All selected tickets will updated with added reminders.

### BULK UPDATE / ASSIGNMENT

Action in tab in data grids provides a feature to update multiple tickets at a time.

The screenshot shows a user interface for a ticket management system. On the left, there is a sidebar with navigation options like 'Incident', 'Create New', 'P1/Critical Incidents (66)', 'My Work (5)', 'My Group Work (839)', 'Open - Unassigned (792)', 'Resolved (10)', 'Closed (226)', 'Rejected (20)', and 'Scheduled Incidents (5)'. The main area displays a table of tickets under the heading 'My Group Work'. The table has columns for 'ID', 'Title', 'Descr', 'Requestor Name', 'Status', and 'Assigner'. Several tickets are selected, indicated by blue checkmarks in the first column. An 'Action' dropdown menu is open, showing options like 'Add Notes', 'Add Attachment', 'Update', 'Merge', 'Set Reminder', 'Resolve', 'Export To Excel', 'Refresh', and 'Reset Grid State'. The 'Update' option is highlighted.

ID	Title	Descr	Requestor Name	Status	Assigner
<input checked="" type="checkbox"/> IN-210620-0004	Application Slowness Issue	Appli	Priya Lewis	OPEN	Service De
<input checked="" type="checkbox"/> IN-210620-0002	Browser Compatibility Issue	Desc	Priya Lewis	OPEN	Service De
<input checked="" type="checkbox"/> IN-210619-0020	Desktop not working	Desk	Edwin Toh	PROGRESSING	Service De
<input checked="" type="checkbox"/> IN-210619-0019	Outlook   User continues to get pro...	Outlo	Jagadeep Vudatha	OPEN	Service De
<input checked="" type="checkbox"/> IN-210619-0004	Application Slowness Issue	Appli	Jagadeep Vudatha	OPEN	Service De
<input checked="" type="checkbox"/> IN-210619-0003	SYSTEM / MONITORING / ALERT	SYST	Jagadeep Vudatha	OPEN	Service De
<input checked="" type="checkbox"/> IN-210618-0001	Desktop not working	Desk	Priya Lewis	PROGRESSING	Service De
<input checked="" type="checkbox"/> IN-210618-0009	Account is locked..	Account is locked..	Jignesh Sodvadiya	OPEN	Service De
<input checked="" type="checkbox"/> IN-210618-0007	My Ad account locked	From: Sodvadiya, Jignesh *...	Jignesh Sodvadiya	OPEN	Service De

1. Select tickets from same module by clicking on checkbox placed beside the ticket id
2. Click on **Action** button
3. Select '**Update**' action item, modify status, priority, category or assignment details.
4. Click on submit

All selected tickets will updated with added contents.

The screenshot shows an 'Update' dialog box with the following fields and options:

- Assignment Group:** Choose one (dropdown)
- Technician Name:** Choose one (dropdown)
- Status:** x PROGRESSING (dropdown)
- Priority:** Choose one (dropdown)
- Category/Sub Category/Item:** (empty field with a search icon)
- Reason for status change \*:** A rich text editor with a toolbar containing options like Paragraph, Bold (B), Italic (I), Link (🔗), Bulleted List (•••), Numbered List (123), Indent (≡), Decrease Indent (≡), Image (🖼️), Quote (🗣️), Table (📊), Video (📺), Undo (↶), and Redo (↷).

At the bottom of the dialog, there are 'Submit' and 'Cancel' buttons.

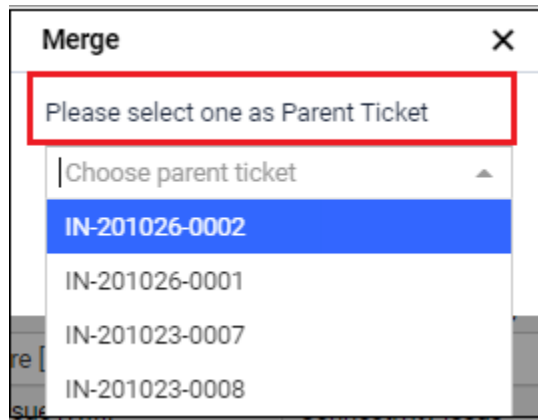
## MERGE TICKETS

From My Group/Work data grids you can merge two or more incidents if the incidents are related to each other, say two incidents are raised from a single contact regarding a similar product. These two requests can be merged as one and a technician can be assigned to this merged incident.

ID	Title	Descr	Requestor Name	Status	Assigner
IN-210620-0004	Application Slowness Issue	Appli	Priya Lewis	OPEN	Service De
IN-210620-0002	Browser Compatibility Issue	Desc	Priya Lewis	OPEN	Service De
IN-210619-0020	Desktop not working	Desk	Edwin Toh	PROGRESSING	Service De
IN-210619-0019	Outlook   User continues to get pro...	Outlo	Jagadeep Vudatha	OPEN	Service De
IN-210619-0004	Application Slowness Issue	Appli	Jagadeep Vudatha	OPEN	Service De
IN-210619-0003	SYSTEM / MONITORING / ALERT	SYST	Jagadeep Vudatha	OPEN	Service De
IN-210619-0001	Desktop not working	Desk	Priya Lewis	PROGRESSING	Service De
IN-210618-0009	Account is locked..	Account is locked..	Jignesh Sodvadiya	OPEN	Service De
IN-210618-0007	My Ad account locked	From: Sodvadiya, Jignesh "...	Jignesh Sodvadiya	OPEN	Service De

To merge requests,

1. Click on the Incident Module in the left panel and select My Group/ Work data grids.
2. Select the list of incidents to be merged by selecting the check box.
3. Click the Action drop down menu -> select **Merge** option. A confirmation dialog appears.
4. Select one ticket as Parent ticket
5. Click Merge to proceed. The selected incidents are merged.



All linked tickets disappeared from data grid and visible under Parent ticket.

Click on blinking '+' icon on Parent ticket to view all child Incidents.

ID	Title	Description	Contact	Status	Assignment Group	Category
IN-201026-0002	Mouse is not working	Mouse is not working	Irene Iozzo	OPEN	IT Support	DOMAINACCESS, USEF
IN-201023-0009	Hardware failure [LAPTOP]	Hardware failure	Adam Stanley	APPROVED	IT Support Escalation	LAPTOP DESKTOP, PRI
IN-201023-0006	Deleted Files	Deleted Files	Irene Iozzo	ASSIGNED	IT Support Escalation	SECURITY
IN-201023-0005	Signin App	Signin App	Adam Cowen	OPEN	IT Support	APP INVITE EMAIL, US
IN-201023-0004	Unable to access one drive	Unable to access one drive	Adam Cowen	OPEN	IT Support	DOMAINACCESS, USEF
IN-201023-0003	Outlook is not working on my laptop	Outlook is not working on m...	Irene Iozzo	OPEN	IT Support	APP INVITE EMAIL, US

**Related Tickets**

> Child Incidents (3)

ID	Customer Name	Contact Name	Location	Category	Sub Category
<a href="#">IN-201026-0001</a>	UKBC	Adam Cowen	Tilbrook	DOMAINACCESS, USER ...	PASSWORD
<a href="#">IN-201023-0007</a>	UKBC	Paul Stevens	Tilbrook	SECURITY	AV
<a href="#">IN-201023-0008</a>	UKBC	Paul Stevens	Tilbrook	LAPTOP DESKTOP, PRIN...	WIFI , CABLED, VPN

1 - 3 of 3 items

P and C icons stands for 'Parent' and 'Child' tickets respectively.

**Edit Incident - IN-201026-0002**

Update Action Search Related Items

Ticket Details Activity Log Notes Log Task (0) Approval (0) Links (3) More Info Impacted CI (0) Resolution

Client Name \* UKBC Requestor Name \* Irene Iozzo Location \* Tilbrook Contact No.

Category/Sub Category/Item \* DOMAINACCESS, USER ACCOUNTS, ACCESS/PASSWORD/IT SUPPORT Response Target 100% Resolution Target 100%

Status \* OPEN Impact \* LOW Severity \* LOW Priority \* P1

**Edit Incident - IN-201026-0001**

Update Action Search Related Items

Ticket Details Activity Log Notes Log Task (0) Approval (0) Links (1) More Info Impacted CI (0) Resolution

Client Name \* UKBC Requestor Name \* Adam Cowen Location \* Tilbrook Contact No.

Category/Sub Category/Item \* DOMAINACCESS, USER ACCOUNTS, ACCESS/PASSWORD/IT SUPPORT Response Target 100% Resolution Target

## BULK RESOLVE/CLOSE

Data grid provides facility to resolve multiple tickets at once.

Jagadeep Vudatha Practice Manager

My Group Work

Action Column Visibility 25 Search

	ID	Title	Desci	Requestor Name	Status	Assigner
<input type="checkbox"/>	<a href="#">IN-210620-0004</a>	Application Slowness Issue	Appli	Priya Lewis	OPEN	Service De
<input type="checkbox"/>	<a href="#">IN-210620-0002</a>	Browser Compatibility Issue	Desc	Priya Lewis	OPEN	Service De
<input type="checkbox"/>	<a href="#">IN-210619-0020</a>	Desktop not working	Desk	Edwin Toh	PROGRESSING	Service De
<input type="checkbox"/>	<a href="#">IN-210619-0019</a>	Outlook   User continues to get pro...	Outlo	Jagadeep Vudatha	OPEN	Service De
<input type="checkbox"/>	<a href="#">IN-210619-0004</a>	Application Slowness Issue	Appli	Jagadeep Vudatha	OPEN	Service De
<input type="checkbox"/>	<a href="#">IN-210619-0003</a>	SYSTEM / MONITORING / ALERT	SYST	Jagadeep Vudatha	OPEN	Service De
<input type="checkbox"/>	<a href="#">IN-210619-0001</a>	Desktop not working	Desk	Priya Lewis	PROGRESSING	Service De
<input type="checkbox"/>	<a href="#">IN-210618-0009</a>	Account is locked..	Account is locked..	Jignesh Sodvadiya	OPEN	Service De
<input type="checkbox"/>	<a href="#">IN-210618-0007</a>	My Ad account locked	From: Sodvadiya, Jignesh "	Jignesh Sodvadiya	OPEN	Service De

1. Select the list of incidents to be resolved by selecting the check box
2. Click on **Action** button, Select Resolve/ Fulfilled/Close
3. Enter the resolution/closure details
4. Click on **Submit**

**Resolve** ✕

Resolution Method:  Resolution Criteria\*:  Caused By\*:  Resolution CI:

Resolution Comments\*

Paragraph

All selected ticket will be resolved with entered resolution details.

**Note:** If there are any open approval/ tasks tickets associated with the ticket, the application will throw a message.

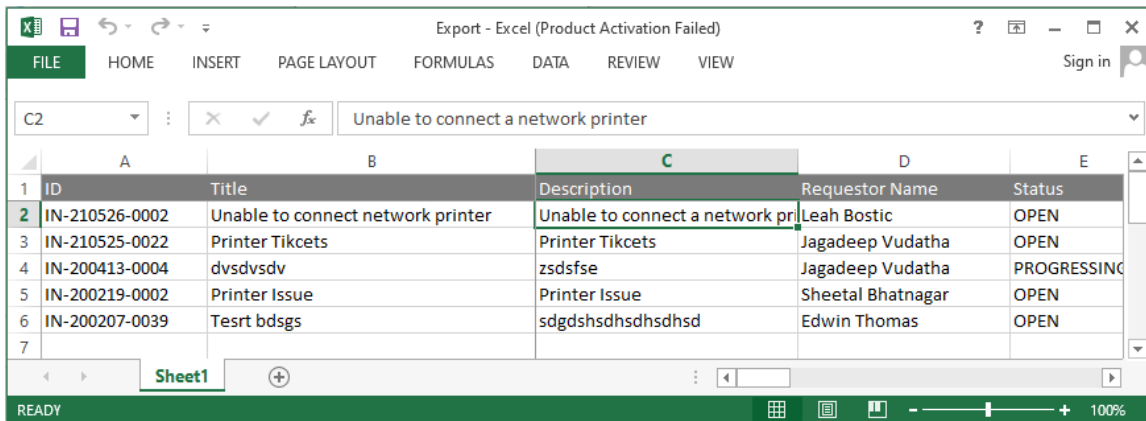
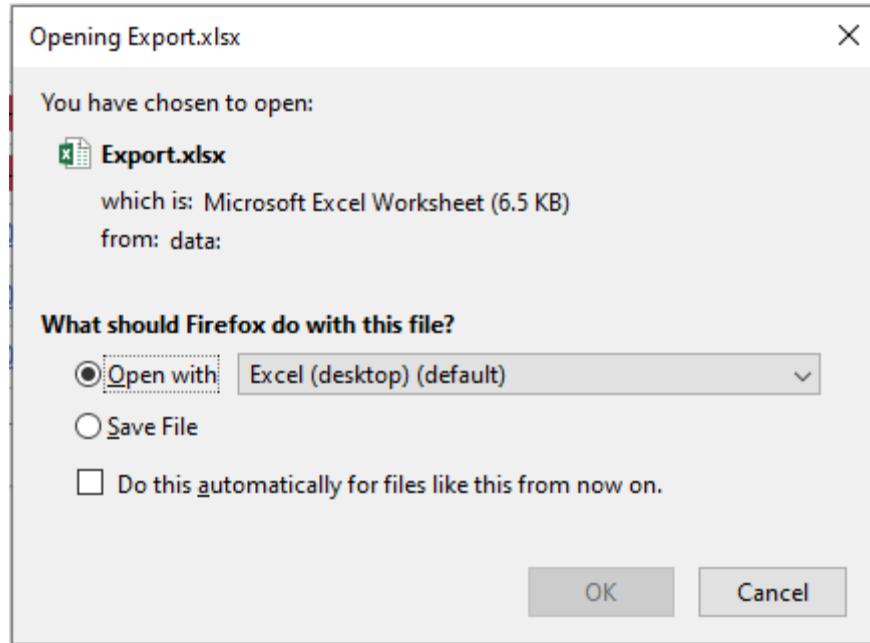
**EXPORT TO EXCEL**

Data grid provides facility to export data in a excel format.

**My Work**

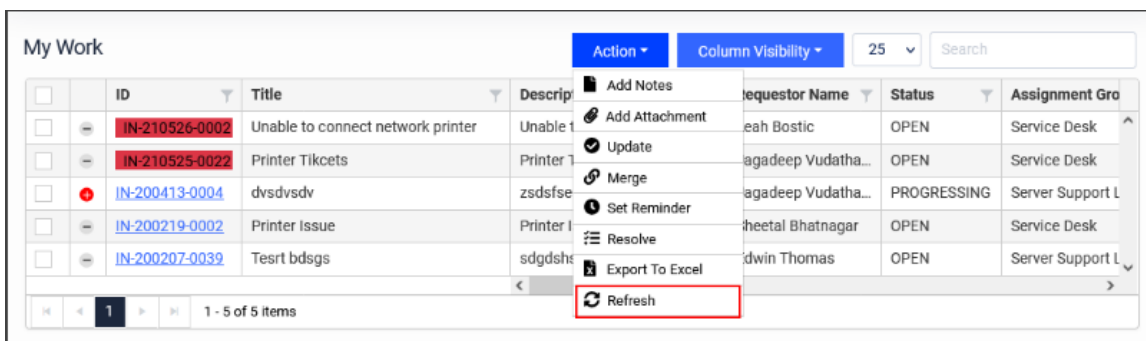
<input type="checkbox"/>	ID	Title	Description	Requestor Name	Status	Assignment Group
<input type="checkbox"/>	IN-210526-0002	Unable to connect network printer	Unable to connect network printer	Leah Bostic	OPEN	Service Desk
<input type="checkbox"/>	IN-210525-0022	Printer Tickets	Printer Tickets	Agadeep Vudatha...	OPEN	Service Desk
<input type="checkbox"/>	IN-200413-0004	dvsdvsdv	zsdvsfse	Agadeep Vudatha...	PROGRESSING	Server Support L
<input type="checkbox"/>	IN-200219-0002	Printer Issue	Printer Issue	Sheetal Bhatnagar	OPEN	Service Desk
<input type="checkbox"/>	IN-200207-0039	Tesrt bdsgrs	sdgdshs	Adwin Thomas	OPEN	Server Support L

1 - 5 of 5 items



**REFRESH**

Data grid provides facility to refresh the data grid from action item.



### VIEW SLA INFORMATION FROM DATA GRID

On mouse over a required ticket number, pop up will display a SLA information with elapsed time and SLA status.

The screenshot shows a data grid titled "My Group Work" with a search bar and an "Action" button. A tooltip titled "SLA for Resolution" is displayed over a ticket ID "IN-210620-0002". The tooltip contains the following information:

- SLA Target time(min): 20
- SLA Actual Elapsed Time (min): 1593
- SLA Status: **BREACHED**
- SLA Start Time: 06/20/2021 06:44:30
- SLA Target Time: 06/20/2021 07:04:14
- SLA End Time: (not explicitly shown in the tooltip)

The data grid below the tooltip shows the following tickets:

ID	Status
IN-210620-0004	+
IN-210620-0002	+
IN-210619-0020	-
IN-210619-0019	-
IN-210619-0018	-
IN-210619-0017	-
IN-210619-0016	-
IN-210619-0015	-
IN-210619-0014	-
IN-210619-0012	-

### VIEW LINKED TICKETS FROM DATA GRID

Blinking '+' symbol placed precede to ticket id represents that ticket has linked tickets. On clicking on '+' symbol, pop up data grid displays all linked tickets.

The screenshot shows a data grid titled "My Group Work" with a search bar and an "Action" button. A ticket ID "IN-210609-0032" is highlighted with a red box and a blinking '+' symbol. A "Related Tickets" popup is displayed, showing the following linked tickets:

- Request (1)
- Change (1)
- Problem (1)

The "Related Tickets" popup contains a table with the following data:

ID	Customer Name	Short Description	Requestor Name	Category	Sub Category
PR-210610-0002	Allied	Ad account locked	Priya Lewis	HARDWARE	LAPTOP

The popup also shows a pagination bar with "1 - 1 of 1 items".

## WILD CARD SEARCH ON DATA GRIDS

Free text box with search water mark at the top right side allows agent to search for any tickets with the keywords.

The screenshot shows a data grid titled "My Group Work". At the top right, there is a search bar with a red border and a magnifying glass icon. The grid has columns for ID, Description, Requestor Name, Status, and Title. A single row is visible with ID "IN-210619-0019" and Description "Outlook | User continues to get prompted for c".

## COLUMN VISIBILITY

Column visibility allows agent to select required columns to be visible in data grid. Number dropdown allows to select number of tickets to display in data grid.

The screenshot shows the same data grid as above, but with a "Column Visibility" dropdown menu open. The menu lists various columns with checkboxes: ID, Description, Requestor Name, Status, Title, Assignment Group, Category, Sub Category, Item, Technician Name, Priority, Urgency, Created By, and Opened Date. All checkboxes are currently checked.

The screenshot shows the data grid with a number dropdown menu open. The dropdown lists the numbers 25, 15, 10, and 5. The current selection is 25.

## FILTERING THE DATA/ COLUMNS

Filter option at the top of each columns helps agent to filter the data according to their requirements.

**My Group Work** Action ▾ Column Visibility ▾

<input type="checkbox"/>		ID ▾	Description ▾	Requestor Name ▾	Status ▾	Title
<input type="checkbox"/>	+	IN-210620-0004	Application Name - [Enter t...	Priya Lewis		
<input type="checkbox"/>	+	IN-210620-0002	Description*Browser Name...	Priya Lewis		
<input type="checkbox"/>	-	IN-210619-0019	Outlook   User continues to ...	Jagadeep Vudatha		
<input type="checkbox"/>	-	IN-210619-0004	Application Name - [Enter t...	Jagadeep Vudatha		
<input type="checkbox"/>	-	IN-210619-0003	SYSTEM / MONITORING / ...	Jagadeep Vudatha		
<input type="checkbox"/>	+	IN-210619-0001	Desktop not working	Priya Lewis		
<input type="checkbox"/>	+	IN-210618-0009	Account is locked..	Jignesh Sodvadiya		
<input type="checkbox"/>	+	IN-210618-0007	From: Sodvadiya, Jignesh "...	Jignesh Sodvadiya		
<input type="checkbox"/>	+	IN-210612-0002	From: Dropbox "no-reply@d...	Default Email User		

Show items with value that:

Is equal to ▾

And ▾

Is equal to ▾

Filter Clear

**My Group Work** Action ▾

<input type="checkbox"/>		ID ▾	Description ▾	Requestor Name ▾	Status
<input type="checkbox"/>	-	IN-210609-0063	From: aditaasusdemo@alli.		PEN
<input type="checkbox"/>	-	IN-210609-0061	From: aditaasusdemo@alli.		PEN
<input type="checkbox"/>	-	IN-210609-0056	From: aditaasusdemo@alli.		PEN
<input type="checkbox"/>	-	IN-210609-0055	From: aditaasusdemo@alli.		PEN
<input type="checkbox"/>	-	IN-210609-0054	From: aditaasusdemo@alli.		PEN
<input type="checkbox"/>	-	IN-210609-0053	From: aditaasusdemo@alli.		PEN
<input type="checkbox"/>	-	IN-210609-0052	From: aditaasusdemo@alli.		PEN
<input type="checkbox"/>	-	IN-210609-0051	From: aditaasusdemo@alli.		PEN
<input type="checkbox"/>	-	IN-210609-0050	From: aditaasusdemo@alli.		PEN

Show items with value that:

Has value ▾

Is not equal to

Starts with

Contains

Does not contain

Ends with

Has no value

Has value

### SORTING THE DATA/ COLUMNS

The sort order for a data grid is indicated graphically in the column headers. A small arrow next to the column heading indicates the sort direction as well as which column is being sorted on.

You can change the sort attribute by clicking the column that you want to sort on. If you click a column that is already sorted, the direction of sorting is switched.



My Group Work									
ID	Title	Description	Requestor Name	Status	Assignment Group	Category	Sub Category		
IN-210609-0016	[PRTG Network Monitor (ADSLUSLV...	New Status: Threshold reac...	Jagadeep Vudatha	OPEN	Service Desk				
IN-210604-0004	[PRTG Network Monitor (ADSLUSLV...	New Status: Threshold reac...	Jagadeep Vudatha	OPEN	Service Desk				
IN-210531-0001	[PRTG Network Monitor (ADSLUSLV...	New Status: Threshold reac...	Jagadeep Vudatha	OPEN	Service Desk				
IN-210528-0007	[PRTG Network Monitor (ADSLUSLV...	New Status: Threshold reac...	Jagadeep Vudatha	OPEN	Service Desk				
IN-210527-0005	[PRTG Network Monitor (ADSLUSLV...	From: PRTG Network Monit...	Default Email User	OPEN	Service Desk	PHONE	MOBILE PHONE		

## PAGE NAVIGATION

Sometimes your results list will fill more than a single results page. You display the different results pages using the page control at the bottom of the results list.

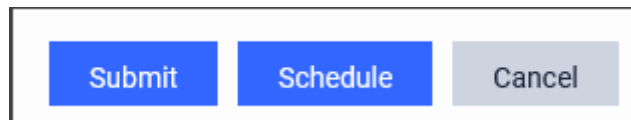


Click on arrows to displays the first page, previous page, displays the next page and final page of the results  
You can also click on specific page you want to display.

## SCHEDULED INCIDENTS

**Create Scheduled Incident** - Scheduled ticket functionality benefits when there are some activities need to be executed at regular intervals. Once a ticket is scheduled, new ticket will be created and assigned to the specified support group automatically at the scheduled interval.

1. Navigate to Incident Module and click on **'Create New'**
2. Fill all \* marked mandatory fields and click on **'Schedule'** instead of clicking on submit.



3. Displays scheduled dialog box, Select Scheduler Type, Schedule from Date & Time
4. Click on **Submit**

**Schedule** ✕

Once  
  Daily  
  Weekly  
  Monthly

Schedule On Days \*

Sunday  
  Monday  
  Tuesday  
  Wednesday  
 Thursday  
  Friday  
  Saturday

Schedule from Date & Time \*

06/21/2021 06:52:39

**Deactivate Scheduled Incident** - Scheduled ticket can be mark as inactive by unchecking the **Is Active** checkbox.

1. Navigate to **Incident** Module and click on **'Scheduled Incidents'**
2. Click on respective scheduled ticket and uncheck **Is Active** checkbox
3. Click on **Update**

The screenshot shows the ADiTaaS user interface. On the left is a sidebar with the user profile 'Jagadeep Vudatha, Practice Manager' and a 'MAIN MENU' containing 'Dashboard', 'My Mailbox', 'My Favorites', and 'Incident'. Under 'Incident', there are links for 'Create New', 'P1/Critical Incidents (66)', 'My Work (5)', 'My Group Work (839)', 'Open - Unassigned (792)', 'Resolved (10)', 'Closed (220)', 'Rejected (20)', and 'Scheduled Incidents (5)'. The main area is titled 'Scheduled Incidents' and features a search bar, 'Action', 'Column Visibility', and a dropdown for '25 Outlook'. Below this is a table with the following data:

Scheduled Id	Scheduled Type	Status	Scheduled Date & Time	Scheduled Details	Title
<a href="#">SCH-201113-0002</a>	Once	Active	06/21/2021 19:28:00		Outlook   User continues to get pro...

At the bottom of the table, there is a pagination control showing '1' of '1 - 1 of 1 items'.

## Request Management

Request fulfillment is the process responsible for managing the life cycle of all service requests from the users. It is the process for dealing with service requests, many of them are actually smaller, or low risk. The purpose needed to fulfill a request will vary depending upon exactly what is being requested

### INCIDENT VS. REQUEST

Incidents are unplanned interruptions to your IT services, or reductions in the quality of your IT services. So when a user reports an incident, they are notifying you of the unavailability or decreased performance of an IT service they normally have access to.

Service requests, on the other hand, deal with requests for something new to be provided to the user that they don't already have, whether that's a new version of a software program, or access to an online portal.

### REQUESTING SERVICES

Requests can be created via a different ways, such as web application, email or a phone call.

To create a new service request using the web application,

1. In shortcut bar, go to **Request** Module → Click on '**Create New**'
2. Displays a **Create Request** page
3. Enter all \* marked following mandatory fields.
  - a. **Client Name**- This is a mandatory field and data is auto populated with client information.
  - b. **Requestor Name**- Mandatory field. Select contact details of user who has requested for the service. If contact is not present in the application, then new contact can be created by using **add contact** feature. You can use search button to find the existing contact.
  - c. **Location**- Mandatory field. Auto populates user location from system.
  - d. **Contact No**- Optional Field. Auto populates user contact number from system.
  - e. **Category/ Sub Category/ Item**- Mandatory field. This fields helps to classify type of service requests raised. Select the relevant category, subcategory and item.
  - f. **Status**- Mandatory field. There are different status available throughout the life cycle of service request.
  - g. **Priority**- Mandatory field .By default service request priority is set to '**P4**'. Depend on urgency of the service request agent can change the priority.
  - h. **Impact**- Mandatory field .Ticket **impact** can change to '**HIGH**', '**MEDIUM**' or '**LOW**' depend on service request
  - i. **Urgency** - Mandatory field .Ticket **Urgency** can change to '**HIGH**', '**MEDIUM**' or '**LOW**' depend on service request.
  - j. **Channel**- Mandatory field .Channel indicates source through which service request is logged. Ticket logged via self-service will have by default '**SELF SERVICE**' as a channel
  - k. **Assigned Group**- Mandatory field. Select appropriate support group to work on service request. Ticket logged via self-service will have by default '**SERVIE DESK**' group as an assignment group.

- l. **Assign To-** Assign ticket to individual. On clicking search option list of Agent names will appears.
- m. **Configuration Item-** Optional field. Related CI can be added to the ticket.
- n. **Alternate Contact:** Optional field.
- o. **Alternate Location:** Optional field.
- p. **Vendor Ticket Number-** Optional field.
- q. **Opened Date:** System auto captures date and time when request is created.
- r. **Opened By:** System auto captures name of the agent/ end user who has created the request.
- s. **Short Description:** Provide a relevant title to the request that will exactly summarize the service need to be provided.
- t. **Additional Comments:** Provide a detailed description with any other associated details relevant to the service request.

- u. Click on **Add Attachment** to add attachment during the ticket creation.
- v. Once all the required mandatory are filled and click on **Submit** button.
- w. New service request will be created with **unique Request ID** and an email notification is sent to confirm that the ticket has been raised.

## COMMON REQUESTS

Creating individual form for each request template for the most frequently raised request such as, password reset, request for laptop etc. The fields can be pre filled with values so that a request can be created instantly. Under Administration module all templates can be configured and during the request creation all configured templates will be displayed under common requests drop down.

1. Navigate to **Request Module** from left menu bar
2. Click on Create New, displays new request creation page
3. Select the required Create New template from **common requests** drop down
4. The fields can be pre filled with values
5. Enter the Requestor name and any additional information if any
6. Click on **Submit**

## REQUEST DATA GRIDS

### My Work/ My Group Work

Once service request is created, Agent can view requests which are assigned to him under 'My Work' and all the requests which are assigned to his groups are visible under 'Group Work' tab.

Go to **Request** module → Click on 'My Work' or 'My Group Work'

ID	Title	Description	Requestor Name	Status	Assignment Group
210621-0001	Request for new laptop	Request for new laptop	Priya Lewis	OPEN	Service Desk
R-210608-0001	Request for Smart Badge Activation...	Request for Smart Badge A...	Jagadeep Vudatha	APPROVED	Service Desk
R-210607-0002	Request for Smart Badge Unblocke...	Request for Smart Badge U...	Deepak Shukla	OPEN	Service Desk
R-210607-0001	Request for laptop charger	Request for laptop charger	Edwin Toh	OPEN	Service Desk
R-210605-0001	Printer not working	Laptop not working	Jagadeep Vudatha	OPEN	Service Desk
R-210603-0010	Laptop Request LENOVO- X1 YOGA	Laptop Request LENOVO- X...	Jagadeep Vudatha	OPEN	Service Desk
R-210603-0009	Laptop Request LENOVO- X1 YOGA	Laptop Request LENOVO- X...	Sudarshan Chavankhot	OPEN	Service Desk
R-210603-0008	Request for Smart Badge Activation...	Request for Smart Badge A...	Sudarshan Chavankhot	OPEN	Service Desk
R-210603-0007	Request for Software Installations	Software Installation, Softw...	Sudarshan Chavankhot	OPEN	Service Desk
R-210603-0006	Request for IPHONE Mobile	Request for IPHONE Mobile	Jagadeep Vudatha	OPEN	Service Desk
R-210603-0005	Request for IPHONE Mobile	Request for IPHONE Mobile	Jagadeep Vudatha	OPEN	Service Desk
R-210603-0004	Request for IPHONE Mobile	Request for IPHONE Mobile	Jagadeep Vudatha	OPEN	Service Desk

**P1/ Critical Requests-** Displays list of all P1/ Critical Requests

**Open –Unassigned-** Displays list of open requests tickets pending to assign to individual

**My Approvals-** Displays all approvals assigned to you.

**My Group Approvals-** Displays all approvals assigned to your approval groups.

**Fulfilled -** Displays list of fulfilled requests

**Closed-** Displays list of all closed requests

**Rejected-** Displays list of rejected requests

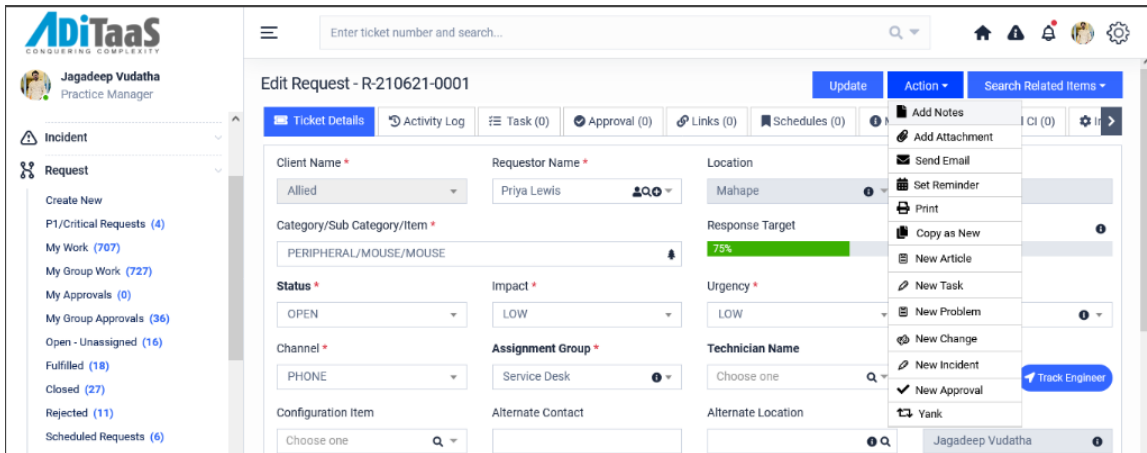
**Scheduled Requests-** Displays list of all scheduled requests

**Calendar View-** Displays scheduled requests, set reminders on calendar view.

### EDIT/ UPDATE REQUEST

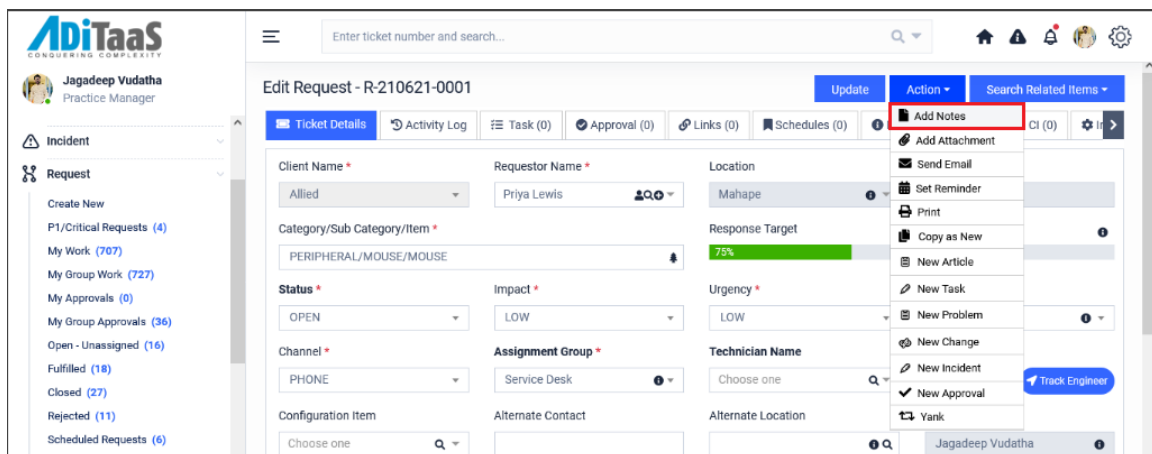
On successful creation of ticket, system will generate unique ticket id. Ticket id starts with date and number. **R-** Indicates request ticket.

Agent can perform more actions on edit request screen, where agent can modify the information in the screen and click on Update button to save the changes.



## ADD NOTES

1. To add any additional information or work logs to ticket, click on **Action** → **Add Notes**.



2. Add Notes dialog box will open
3. Click on checkbox to select required action items available on notes window
  - **Internal Notes:** Notes will be visible only agents. By default added notes will be visible for both agents and end users.
  - **Email this note to technician:** Email notification will be sent to assigned technician with added notes.
  - **Email this note to support group:** Email notification will be sent to all members of ticket assigned group with notes.
  - **Email this note to requestor:** Email notification will be sent to requestor with added notes.
  - **Watch list:** This functionality enables technician to add any email id to keep posted with ticket updates. Once email id is added to watch list, all noticeable members will receive notification on any status change, on notes added and on resolution of the ticket.

**Add Notes**
✕

Internal Notes  
 Email this note to Support Group

Email this note to Requestor  
 Email this note to Technician

Watch List Email Id

Add Email Ids

**Notes \***

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Add Notes

Cancel

4. Enter the required comments/images/screenshots in the Notes section and click on **Add Notes**. Added information will be visible in **Activity Log**.

Edit Incident - IN-210620-0004

Update
Action ▼
Search Related Items ▼

Ticket Details
Activity Log
Task (0)
Approval (0)
Links (0)
Schedules (0)
More Info
Impacted CI (0)
Interaction (0)
Resolution

**Filter**

Activity Type:

Add Notes ▼

Log Title:

Type to search

From Date:

month/day/year hours:minute... 🗓️ ✕

To Date:

month/day/year hours:minute... 🗓️ ✕ 🔍

» Detailed Activity Log

📄

**Internal Notes added on 06/20/2021 20:08:41 by user = Jagadeep Vudatha**

Notes are added to the ticket.

### ADD ATTACHMENT:

1. To add an attachment to a ticket, click on **Action → Add Attachment**.
2. On clicking will open up a new window.
3. From the file chooser window, click on Browse to choose the file to be attached
4. Click open to upload the attachment.



The screenshot shows the 'Edit Request - R-210621-0001' page. The 'Action' dropdown menu is open, and the 'Add Attachment' option is highlighted with a red box. Other options in the menu include Add Notes, Send Email, Set Reminder, Print, Copy as New, New Article, New Task, New Problem, New Change, New Incident, New Approval, and Rank. The main form fields include Client Name (Allied), Requestor Name (Priya Lewis), Location (Mahape), Category/Sub Category/Item (PERIPHERAL/MOUSE/MOUSE), Status (OPEN), Impact (LOW), Urgency (LOW), Channel (PHONE), and Assignment Group (Service Desk).

The 'Add Attachment' dialog box is shown. It features a dashed border and a central area with a downward arrow icon, a 'Browse...' button, and the text 'No file selected.' Below this, there is a green link that says 'Or Drag It Here.' At the bottom, there is a table listing the attached files.

	File Name	Attached By	Attached On
<input type="checkbox"/>	New Text Document.txt	Jagadeep Vudatha	06/20/2021 20:10:58

Buttons for 'Delete Attachment' and 'Close' are located at the bottom of the dialog.

All Uploaded attachments will be visible Under 'View Attachment(s)' tab.

The screenshot shows the 'Edit Request - R-210621-0001' page with the 'View Attachment(s)' tab selected in the top navigation bar. The 'New Text Document.txt' attachment is visible in the list below the tabs.

### DELETE/ REMOVE ATTACHMENT:

To remove an attachment, click on respective attached attachment by clicking on checkbox and click on 'Delete Attachment'.

### Add Attachment ✕

Browse...    No file selected.

Or Drag It Here.

	File Name	Attached By	Attached On
<input type="checkbox"/>	New Text Document.txt	Jagadeep Vudatha	06/20/2021 20:10:58

Delete Attachment
Close

To quick delete an attachment , click on **'View Attachment(s)'** tab and go to respective attachment click on **'x'** placed next to it.

Edit Request - R-210621-0001
Update
Action ▾
Search Related Items ▾
View Attachment(s) ▾

Ticket Details
Activity Log
Task (0)
Approval (0)
Links (0)
Sc New Text Document.txt ✕

Client Name \*  
Allied ▾

Requestor Name \*  
Priya Lewis 👤

Location  
Mahape ⓘ

Contact No.  
0802545432

**SEND MAIL:**

- To send an email from ticket, click on **Action → Send Email**.

Enter ticket number and search...

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👤
⚙️

Edit Request - R-210621-0001
Update
Action ▾
Search Related Items ▾
View Attachment(s) ▾

Ticket Details
Activity Log
Task (0)
Approval (0)
Links
Add Notes
Add Attachment
More Info
Impacted CI (0)

Client Name \*  
Allied ▾

Requestor Name \*  
Priya Lewis 👤

Location  
Mahape ⓘ

Contact No.  
0802545432

Category/Sub Category/Item \*  
PERIPHERAL/MOUSE/MOUSE

Status \*  
OPEN ▾

Impact \*  
LOW ▾

Resolution Target  
9%

Channel \*  
PHONE ▾

Assignment Group \*  
Service Desk ⓘ

Priority \*  
P4 ⓘ

Field Service  
Schedule Call Track Engineer

Configuration Item  
Choose one 🔍

Alternate Contact

Opened By  
Jagadeep Vudatha ⓘ

**Send Email** (highlighted in red)

Set Reminder ⓘ

Print

Copy as New

New Article

New Task

New Problem ▾

New Change

New Incident

New Approval

Yank

- Compose email, user email id and ticket id will be auto populated in ‘To’ and ‘Subject’ fields respectively. Attach any files by clicking on Browse.

**New Email - From - aditaasusdemo@allieddigital.net** ✕

To \*  Cc

Subject \*

Description \* 

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Browse... No file selected.

Send Email Cancel

- When complete, click on ‘Send Email’. All actions are captured in Activity Log.

### SET REMINDER

Set reminder functionality allows agents to set a reminder to alert on some important tasks/events like contacting end user at specific given time or follow up on any task. It allow to put a date/time and option to select whomever you want to remind.

- To a set reminder, click on **Action → Set Reminder**.

2. Set reminder dialog box is displayed. Enter the **Subject** and **Comments** in box.
3. Select checkbox, if required to send an email notification regarding the notification.
4. In select applicable option from ‘**To Whom**’ drop down list.
  - **Remind me** – Reminder will be set for logged in agent.
  - **Support Group Members**- Reminder will be set for selected support group.
  - **Some else** – Provides option to set a reminder to specific person.
5. **Remind Time** –Select date/time to set a reminder.

## SHOW REMINDERS

All scheduled reminders will be visible under **Action** → **Show Reminders** as well as on **Calendar** view.

**Show Reminders** ✕

<input type="checkbox"/>	Notes	Subject	Scheduled Date & Time	Follow Up Type	Set By
<input type="checkbox"/>	Contact user at 5 PM	Contact user at 5 PM	06/21/2021 17:00:00	Remind Me	Jagadeep Vudatha

1 - 1 of 1 items

Deactivate Reminder
Cancel

**Jagadeep Vudatha**  
Practice Manager

Enter ticket number and search...

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👤
⚙️

**Calendar View** Reminder  Scheduled

June 2021

Month Week Day List

SUN	MON	TUE	WED	THU	FRI	SAT
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21 Sp R-210621-0001	22	23	24	25	26

**Incident**

**Request**

- Create New
- P1/Critical Requests (4)
- My Work (707)
- My Group Work (727)
- My Approvals (0)
- My Group Approvals (36)
- Open - Unassigned (16)
- Fulfilled (18)
- Closed (27)
- Rejected (11)
- Scheduled Requests (6)
- Calendar View

**Knowledge**

**Problem**

## Deactivate the Reminder

Scheduled reminder can be deactivated with simple following steps.

1. Go to **Action** → **Show Reminders**
2. Select reminder by clicking on checkbox and click on **Deactivate Reminder**
3. Reminder Status will be marked as deactivated.

**Show Reminders** ✕

<input type="checkbox"/>	Notes	Subject	Scheduled Date & Time	Follow Up Type	Set By
<input type="checkbox"/>	Contact user at 5 PM	Contact user at 5 PM	06/21/2021 17:00:00	Remind Me	Jagadeep Vudatha

1 - 1 of 1 items

Deactivate Reminder
Cancel

## PRINT REQUEST

If you want to print a ticket, open required ticket need to be print,

Go to **Action** menu → Click on **Print**

Tool will display a print preview option. Print will display ticket details, activity log along with resolution details.

Click on **Print**

The screenshot shows the 'Edit Request' interface for request R-210621-0001. The 'Action' menu is open, and the 'Print' option is highlighted with a red box. The interface includes the following fields and values:

Field	Value
Client Name *	Allied
Requestor Name *	Priya Lewis
Location	Mahape
Category/Sub Category/Item *	PERIPHERAL/MOUSE/MOUSE
Response Target	100%
Resolution Target	12%

The 'Action' menu options are: Add Notes, Add Attachment, Send Email, Set Reminder, Show Reminders, **Print**, and Copy as New.

Print

Cancel

**Request Details**



<b>Number :</b>	R-210621-0001	<b>Client Name :</b>	Allied
<b>Opened By :</b>	Jagadeep Vudatha	<b>Opened Date :</b>	06/21/2021 15:05:21
<b>Requestor Id :</b>	priya.lewis	<b>Requestor Name :</b>	Priya Lewis
<b>Location :</b>	Mahape	<b>Email :</b>	priya.lewis@allieddigital.net
<b>Mobile :</b>	9876567898	<b>Contact No. :</b>	0802545432
<b>Category :</b>	PERIPHERAL	<b>Sub Category :</b>	MOUSE
<b>Item :</b>	MOUSE	<b>Status :</b>	OPEN
<b>Impact :</b>	LOW	<b>Urgency :</b>	LOW
<b>Priority :</b>	P4	<b>Channel :</b>	PHONE
<b>Assignment Group :</b>	Service Desk	<b>Technician Name :</b>	
<b>Configuration Item :</b>		<b>Target Resolve Date:</b>	06/22/2021 01:55:21
<b>Alternate Location :</b>		<b>Alternate Contact :</b>	
<b>Vendor Ticket Number :</b>		<b>On Behalf Of :</b>	
<b>Short Description :</b>	Request for new laptop		
<b>Additional Comments :</b>	Request for new laptop		

**Activity Log :**

**Reminder Set On 06/21/2021 16:26:10 by user = Jagadeep Vudatha**

**Subject:-** Contact user at 5 PM  
**Comments :-** Contact user at 5 PM  
 by user :- Jagadeep Vudatha  
 Remind Time :- 06/21/2021 17:00:00  
 Reminder Sent To :- jagadeep.vudatha@gmail.com ;

**Attachment added on 06/21/2021 16:05:44 by user = Jagadeep Vudatha**

**Attachment Name:-** New Text Document.txt, Added by user = Jagadeep Vudatha

**Email Sent On 06/21/2021 15:05:29 by user = SYSTEM.ADMIN**

**From :-** aditaasusdemo@allieddigital.net  
**To :-** jvudatha@allieddigital.net, davidtcrabill@allieddigital.net, system.admin@mail.com, jagadeep.vudatha@gmail.com, priya.lewis@allieddigital.net  
**Subject :-** Ticket [R-210621-0001] Priority P4 Status OPEN has been dispatched to your Queue [Service Desk]  
**Event Name :-** Business Rule Manager

## COPY AS NEW

Copy as new copies the details of an existing ticket to a new ticket. Instead of re-entering all the information for new requestor.

1. Click on **Action** → **Copy as New**
2. Copy As New dialog box will open to enter the **Requestor Name**

3. Search and select required **Requestor Name** and Click **Create**.

## QUICK LINKS TO CREATE TICKET FROM REQUEST

Following links helps to create other module tickets from request ticket



**Edit Request - R-210621-0001**

Update | Action | Search Related Items | View Attachment(s)

Ticket Details | Activity Log | Task (0) | Approval (0) | Links | Add Notes | Add Attachment | More Info | Impacted CI (0)

Client Name: Allied | Requestor Name: Priya Lewis | Location: Mahape | Contact No.: 0802545432

Category/Sub Category/Item: PERIPHERAL/MOUSE/MOUSE | Response Target: 38% | Resolution Target: 100%

Status: OPEN | Impact: LOW | Urgency: LOW | Priority: P4

Channel: PHONE | Assignment Group: Service Desk | Technician Name: Choose one | Field Service: Schedule Call | Track Engineer

Configuration Item: Choose one | Alternate Contact: | Alternate Location: | Vendor Ticket Number: | On Behalf Of: Jagadeep Vudatha

Opened Date: 06/21/2021 15:05:21 | Target Fulfill Date: 06/22/2021 01:55:21

Short Description: \*

## New Article

Allows to raise an article from request ticket.

1. Go to **Action** → **New Article**
2. Enter the new article details and click on submit
3. New created article will be linked to request ticket.

**Edit Request - R-210621-0001**

Update | Action | Search Related Items | View Attachment(s)

Ticket Details | Activity Log | Task (0) | Approval (0) | Links (0) | Schedules (0) | More Info | Interaction (0) | Fulfillment

Client Name: Allied | Requestor Name: Priya Lewis | Location: Mahape | Contact No.: 0802545432

Category/Sub Category/Item: PERIPHERAL/MOUSE/MOUSE | Response Target: 38% | Resolution Target: 9%

Status: OPEN | Impact: LOW | Urgency: LOW | Priority: P4

Channel: PHONE | Assignment Group: Service Desk | Technician Name: Choose one | Field Service: Schedule Call | Track Engineer

Configuration Item: Choose one | Alternate Contact: | Alternate Location: | Vendor Ticket Number: | On Behalf Of: Jagadeep Vudatha

Opened Date: 06/21/2021 15:05:21 | Target Fulfill Date: 06/22/2021 01:55:21

Short Description: \*

**Create Knowledge Article**
Add Attachment Submit ✕

**Client Name \***

**Status \***

**Category/Sub Category/Item \***

**Problem Title \***

**Problem Description \***

Paragraph

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**Assignment Group \***

**Technician Name**

**Source \***

**Type \***

**Available For \***

**Configuration Item**

**Tags**

**Additional Link**

**Opened By**

**Opened Date**

**Article Image**

No file selected.

Or Drag It Here.

**Solution \***

Paragraph

**B I**

Submit
Cancel

## New Task

Allows to raise a new task ticket from request ticket.

1. Go to **Action** → **New Task**
2. Enter the new task details and click on submit
3. New created task ticket will be linked to request ticket.

**Create Task**

Add Attachment
Submit
X

<b>Client Name *</b> <input type="text" value="Allied"/>	<b>Requestor Name *</b> <input type="text" value="Priya Lewis"/>	<b>Task Name *</b> <input type="text"/>	<b>Linked To</b> <input type="text" value="R-210621-0001"/>
<b>Status *</b> <input type="text" value="OPEN"/>	<b>Assignment Group *</b> <input type="text" value="Choose one"/>	<b>Technician Name</b> <input type="text" value="Choose one"/>	<b>Opened By</b> <input type="text" value="Jagadeep Vudatha"/>
<b>Opened Date</b> <input type="text" value="06/24/2021 14:52:27"/>	<b>Due Date</b> <input type="text" value="month/day/year hours: minu..."/>	<b>Sequence *</b> <input type="text" value="1"/>	

**Task Description \***

**Additional Comments \***

Paragraph B I

Request for new laptop

Submit
Cancel

### New Problem

Allows to raise a new problem ticket from request ticket.

1. Go to **Action** → **New Problem**
2. Enter the new problem details and click on submit
3. New created problem ticket will be linked to request ticket.

Enter ticket number and search...

**Edit Request - R-210621-0001**

Update
Action
Search Related Items
View Attachment(s)

Ticket Details
Activity Log
Task (0)
Approval (0)
Links (0)
Schedules (0)
More Info

<b>Client Name *</b> <input type="text" value="Allied"/>	<b>Requestor Name *</b> <input type="text" value="Priya Lewis"/>	<b>Location</b> <input type="text" value="Mahape"/>	<b>Contact No.</b> <input type="text" value="0802545432"/>
<b>Category/Sub Category/Item *</b> <input type="text" value="PERIPHERAL/MOUSE/MOUSE"/>	<b>Response Target</b> <input type="text" value="98%"/>	<b>Resolution Target</b> <input type="text" value="9%"/>	<b>Priority *</b> <input type="text" value="P4"/>
<b>Status *</b> <input type="text" value="OPEN"/>	<b>Impact *</b> <input type="text" value="LOW"/>	<b>Urgency *</b> <input type="text" value="LOW"/>	<b>Field Service</b> <span style="margin-right: 10px;">Schedule Call</span> <span>Track Engineer</span>
<b>Channel *</b> <input type="text" value="PHONE"/>	<b>Assignment Group *</b> <input type="text" value="Service Desk"/>	<b>Technician Name</b> <input type="text" value="Choose one"/>	<b>Opened By</b> <input type="text" value="Jagadeep Vudatha"/>
<b>Configuration Item</b> <input type="text" value="Choose one"/>	<b>Alternate Contact</b> <input type="text"/>	<b>Alternate Location</b> <input type="text"/>	<b>On Behalf Of</b> <input type="text"/>
<b>Opened Date</b> <input type="text" value="06/21/2021 15:05:21"/>	<b>Target Fulfill Date</b> <input type="text" value="06/22/2021 01:55:21"/>	<b>Vendor Ticket Number</b> <input type="text"/>	

**Short Description \***

**Create Problem**
Add Attachment Submit ✕

Client Name *	Requestor Name *	Location	Contact No.
<input type="text" value="Allied"/>	<input type="text" value="Priya Lewis"/>	<input type="text" value="Mahape"/>	<input type="text" value="0802545432"/>
Preferred Contact	Status *	Category/Sub Category/Item *	
<input type="text" value="Primary"/>	<input type="text" value="OPEN"/>	<input type="text"/>	
Impact *	Urgency *	Priority *	Assignment Group *
<input type="text" value="LOW"/>	<input type="text" value="LOW"/>	<input type="text" value="P4"/>	<input type="text" value="Choose one"/>
Technician Name	Configuration Item	Channel *	Opened By
<input type="text" value="Choose one"/>	<input type="text" value="Choose one"/>	<input type="text" value="Choose one"/>	<input type="text" value="Jagadeep Vudatha"/>
Opened Date	Alternate Contact	Alternate Location	Vendor Ticket Number
<input type="text" value="06/25/2021 20:22:26"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
RCA Date Identified	Notification Mode	Is Major *	Problem Manager
<input type="text" value="month/day/year hours: minu..."/>	<input type="text"/>	<input type="radio" value="No"/>	<input type="text" value="Choose one"/>

Submit
Cancel

## New Change

Allows to raise a new change ticket from request ticket.

1. Go to **Action** → **New Change**
2. Enter the new change details and click on submit
3. New created change ticket will be linked to request ticket.

Enter ticket number and search...
🔍

**Edit Request - R-210621-0001**
Update
Action
Search Related Items
View Attachment(s)

Ticket Details
Activity Log
Task (0)
Approval (0)
Links (0)
Schedules (0)
More Info

Client Name *	Requestor Name *	Location	Contact No.
<input type="text" value="Allied"/>	<input type="text" value="Priya Lewis"/>	<input type="text" value="Mahape"/>	<input type="text" value="0802545432"/>
Category/Sub Category/Item *	Status *	Response Target	Resolution Target
<input type="text" value="PERIPHERAL/MOUSE/MOUSE"/>	<input type="text" value="OPEN"/>	<input type="text" value="98%"/>	<input type="text" value="9%"/>
Impact *	Urgency *	Priority *	Assignment Group *
<input type="text" value="LOW"/>	<input type="text" value="LOW"/>	<input type="text" value="P4"/>	<input type="text" value="Service Desk"/>
Channel *	Technician Name	Alternate Location	Field Service
<input type="text" value="PHONE"/>	<input type="text" value="Choose one"/>	<input type="text"/>	<span style="color: #007bff;">Schedule Call</span> <span style="color: #007bff;">Track Engineer</span>
Configuration Item	Alternate Contact	Vendor Ticket Number	Opened By
<input type="text" value="Choose one"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Jagadeep Vudatha"/>
Opened Date	Target Fulfill Date	On Behalf Of	
<input type="text" value="06/21/2021 15:05:21"/>	<input type="text" value="06/22/2021 01:55:21"/>	<input type="text"/>	

Add Notes
Add Attachment
Send Email
Set Reminder
Print
Copy as New
New Article
New Task
New Problem
New Change
New Incident
New Approval
Yank

### Create Change Add Attachment Submit X

Client Name * <input type="text" value="Allied"/>	Change Initiator * <input type="text" value="Priya Lewis"/>	Location * <input type="text" value="Mahape"/>	Status * <input type="text" value="OPEN"/>
Category/Sub Category/Item * <input type="text"/>	Impact * <input type="text" value="LOW"/>	Urgency * <input type="text" value="LOW"/>	
Priority * <input type="text" value="P4"/>	Change Type * <input type="text" value="Choose one"/>	Assignment Group * <input type="text" value="Choose one"/>	Change Owner <input type="text" value="Choose one"/>
Primary CI <input type="text" value="Choose one"/>	Opened By <input type="text" value="Jagadeep Vudatha"/>	Opened Date <input type="text" value="06/24/2021 14:53:38"/>	

Short Description \*

Change Description \*  

Paragraph **B** *I*

## New Incident

Allows to raise a new incident ticket from request ticket.

1. Go to **Action** → **New Request**
2. Enter the new incident details and click on submit
3. New created incident ticket will be linked to request ticket.

Enter ticket number and search...

### Edit Request - R-210621-0001 Update Action Search Related Items View Attachment(s)

Client Name * <input type="text" value="Allied"/>	Requestor Name * <input type="text" value="Priya Lewis"/>	Location <input type="text" value="Mahape"/>	Interaction (0)
Category/Sub Category/Item * <input type="text" value="PERIPHERAL/MOUSE/MOUSE"/>	Response Target <input type="text" value="98%"/>	Urgency * <input type="text" value="LOW"/>	Contact No. <input type="text" value="0802545432"/>
Status * <input type="text" value="OPEN"/>	Impact * <input type="text" value="LOW"/>	Technician Name <input type="text" value="Choose one"/>	Resolution Target <input type="text" value="9%"/>
Channel * <input type="text" value="PHONE"/>	Assignment Group * <input type="text" value="Service Desk"/>	Alternate Location <input type="text"/>	Priority * <input type="text" value="P4"/>
Configuration Item <input type="text" value="Choose one"/>	Alternate Contact <input type="text"/>	Vendor Ticket Number <input type="text"/>	Field Service <input type="button" value="Schedule Call"/> <input type="button" value="Track Engineer"/>
Opened Date <input type="text" value="06/21/2021 15:05:21"/>	Target Fulfill Date <input type="text" value="06/22/2021 01:55:21"/>	On Behalf Of <input type="text"/>	

- Add Notes
- Add Attachment
- Send Email
- Set Reminder
- Print
- Copy as New
- New Article
- New Task
- New Problem
- New Change
- New Incident**
- New Approval
- Yank

Short Description \*

**Create New Incident**

Client Name \* Allied

Requestor Name \* [Search Icon]

Location Choose one

Contact No. [Input Field]

Category/Sub Category/Item \* [Input Field]

Status \* Choose one

Preferred Contact Primary

Notification Mode [Input Field]

Impact \* Choose one

Urgency \* Choose one

Priority \* Choose one

Channel \* Choose one

Assignment Group \* Choose one

Technician Name Choose one

Configuration Item Choose one

Alternate Contact [Input Field]

Alternate Location [Search Icon]

Flags Choose one

Submit Cancel

## New Approval

Allows to raise an approval ticket from request ticket.

1. Go to **Action** → **New Approval**
2. Enter the new approval ticket details and click on submit
3. New created approval ticket will be linked to request ticket.

**Edit Request - R-210621-0001**

Update Action Search Related Items View Attachment(s)

Ticket Details Activity Log Task (0) Approval (0) Links (0) Schedules (0) More Info

Client Name \* Allied

Requestor Name \* Priya Lewis

Location Mahape

Contact No. 0802545432

Category/Sub Category/Item \* PERIPHERAL/MOUSE/MOUSE

Response Target 98%

Resolution Target 9%

Status \* OPEN

Impact \* LOW

Urgency \* LOW

Priority \* P4

Channel \* PHONE

Assignment Group \* Service Desk

Technician Name Choose one

Field Service Schedule Call Track Engineer

Configuration Item Choose one

Alternate Contact [Input Field]

Alternate Location [Search Icon]

Opened Date 06/21/2021 15:05:21

Target Fulfill Date 06/22/2021 01:55:21

Vendor Ticket Number [Input Field]

On Behalf Of [Input Field]

Short Description \* [Input Field]

Dropdown Menu: Add Notes, Add Attachment, Send Email, Set Reminder, Print, Copy as New, New Article, New Task, New Problem, New Change, **New Approval**, New Incident, Yank

### Create Approval

Add Attachment Submit ✕

Approval For <input type="text" value="R-210621-0001"/>	Status * <input type="text" value="OPEN"/>	Approval Group * <input type="text" value="Choose one"/>	Approver <input type="text" value="Choose one"/>
Submitted Date <input type="text" value="06/24/2021 14:54:49"/>	Sequence Of * <input type="text" value="1"/>		

Comments \*

Paragraph

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Submit Cancel

## REQUEST ACTIVITY LOG

**Activity log** captures all actions performed on ticket from request creation to closure with date/time stamp along with agent id. All modification performed on ticket is auto captured. From the creation of ticket to resolution all activities are captured with order. All activities like add notes, add attachment, setting a reminder, creating task, creating approvals, linking tickets, linking CI's all activities are capture in activity log with sequence

**Filter** option at the top provides a facility to search for specific activity log or activity log of record for specific duration.

**Activity Type** displays list activities in drop down list. On selecting specific activity type activity log displays logs accordingly.

**Log Title** allows to enter relevant keyword in given test field, depend on keyword displays the activity log

**From and To date** allows to find activity log for specific duration

### Edit Request - R-210621-0001

Update Action Search Related Items View Attachment(s)

Ticket Details **Activity Log** Task (0) Approval (0) Links (0) Schedules (0) More Info Impacted CI (0) ...

**Filter**

Activity Type: <input type="text" value="-- All --"/>	Log Title: <input type="text" value="Type to search"/>	From Date: <input type="text" value="month/day/year h ..."/>	To Date: <input type="text" value="month/day/year h ..."/>
--	---	---	---

» Detailed Activity Log

**Reminder Set On 06/21/2021 16:26:10 by user = Jagadeep Vudatha**

**Subject:-** Contact user at 5 PM  
**Comments :-** Contact user at 5 PM  
 by user :- Jagadeep Vudatha  
 Remind Time :- 06/21/2021 17:00:00  
 Reminder Sent To :- jagadeep.vudatha@gmail.com ;

**Note:** Logs in the tool protected from alteration after-the-fact.

## TASK

Agent can create a new Task and link to request or open any existing tasks and can link to request. Request ticket cannot be resolved until all linked tasks are closed.

**Create New**- Click on **Task** → **Create New** to create a new Task.

The screenshot shows the 'Edit Request - R-210621-0001' interface. At the top, there are buttons for 'Update', 'Action', 'Search Related Items', and 'View Attachment(s)'. Below these are tabs for 'Ticket Details', 'Activity Log', 'Task (0)', 'Approval (0)', 'Links (0)', 'Schedules (0)', 'More Info', 'Impacted CI (0)', and 'Inte'. The 'Task (0)' tab is active, showing a '» Current Tasks' section with buttons for 'Create New', 'Link Existing Task', and 'Detach Task'. Below this is a table with columns: Task ID, Approval ID, Task Name, Requestor Name, Assignment Group, and Status.

The screenshot shows the 'Create Task' form. It includes the following fields and options:

- Client Name \***: Allied (dropdown)
- Requestor Name \***: Priya Lewis (text input with user icon)
- Task Name \***: (empty text input)
- Linked To**: R-210621-0001 (text input)
- Status \***: OPEN (dropdown)
- Assignment Group \***: Choose one (dropdown)
- Technician Name**: Choose one (dropdown)
- Opened By**: Jagadeep Vudatha (text input with user icon)
- Opened Date**: 06/21/2021 16:50:08 (text input)
- Due Date**: month/day/year hours: minu... (calendar icon)
- Sequence \***: 1 (text input)
- Task Description \***: Request for new laptop (text input)
- Additional Comments \***: Request for new laptop (rich text editor with toolbar)

Buttons at the bottom: 'Submit' and 'Cancel'.

**Link Existing Task**- To link existing link Tasks, click on **Task** → **Link Existing Task** Displays list of existing Tasks. Agent can link one or more tasks to request by clicking on checkboxes.



Link To Search  X

<input type="checkbox"/>	ID	Title	Requestor Name	Assignment Group	Technician Name	Status	Sequence	Opened Date
<input type="checkbox"/>	T-210620-0006	Check Network Status	Priya Lewis	Network Support		OPEN	2	06/20/2021 17:1
<input type="checkbox"/>	T-210620-0005	Check Application Status	Priya Lewis	Service Desk		OPEN	1	06/20/2021 17:1
<input type="checkbox"/>	T-210620-0004	Check database status	Priya Lewis	Server Support		OPEN	1	06/20/2021 17:1
<input type="checkbox"/>	T-210619-0006	Check Network Status	Jagadeep Vudatha	Network Support		OPEN	2	06/19/2021 10:3
<input type="checkbox"/>	T-210619-0005	Check Application Status	Jagadeep Vudatha	Service Desk		OPEN	1	06/19/2021 10:3
<input type="checkbox"/>	T-210619-0004	Check database status	Jagadeep Vudatha	Server Support		OPEN	1	06/19/2021 10:3
<input type="checkbox"/>	T-210619-0003	Check network connection	Priya Lewis	Service Desk		OPEN	2	06/19/2021 06:3
<input type="checkbox"/>	T-210619-0002	Check user machine configuration	Priya Lewis	Service Desk		OPEN	1	06/19/2021 06:3
<input type="checkbox"/>	T-210619-0001	Check MS OFFICE software	Priya Lewis	Service Desk		OPEN	1	06/19/2021 06:3
<input type="checkbox"/>	T-210617-0002	Check Application Status	Jagadeep Vudatha	Service Desk		OPEN	1	06/18/2021 01:5

1 - 10 of 18 items

[Link](#) [Cancel](#)

**Detach Task**- Select respective Task by clicking on checkbox and click on ‘**Detach Task**’ to unlink it.

Edit Request - R-210621-0001 [Update](#) [Action](#) [Search Related Items](#) [View Attachment\(s\)](#)

Ticket Details [Activity Log](#) **Task (1)** [Approval \(0\)](#) [Links \(0\)](#) [Schedules \(0\)](#) [More Info](#) [Impacted CI \(0\)](#) [Inte](#)

» **Current Tasks** [Create New](#) [Link Existing Task](#) [Detach Task](#)

<input checked="" type="checkbox"/>	Task ID	Approval ID	Task Name	Requestor Name	Assignment Group	Status
<input checked="" type="checkbox"/>	<a href="#">T-210620-0006</a>		Check Network Status	Priya Lewis	Network Support	OPEN

Do you want to delete the selected linked tasks?

[Yes](#) [No](#)

## LINKING TICKETS

This tab allows agents to create relationships by linking requests to other tickets in system.

Options Available:

**Request to Request:** Request can be linked to other Request

1. Navigate to request module
2. Open a relevant request ticket in edit mode
3. Move to **Links** tab and select Relation Type as ‘**Request to Request**’

Enter ticket number and search...

Edit Request - R-210621-0001

Update Action Search Related Items View Attachment(s)

Ticket Details Activity Log Task (0) Approval (0) **Links (0)** Schedules (0) More Info Impacted CI (0) Interaction (0) Fulfillment

Relation Type: Choose one

- Request to Request
- Request to Incident
- Request to Change
- Request to Problem
- Request to Knowledgebase


Link To

Search

ID	Title	Status	Assignment Group	Category
R-210623-0022	Request for Guest WiFi access	OPEN	Service Desk	SOFTWARE
R-210623-0021	Request for Guest WiFi access	OPEN	Service Desk	SOFTWARE
R-210623-0020	Request for VPN	OPEN	Service Desk	SOFTWARE
R-210623-0019	Request for VPN	OPEN	Service Desk	SOFTWARE
R-210623-0018	Request for VPN	OPEN	Service Desk	SOFTWARE
R-210623-0017	Request for Guest WiFi access	OPEN	Service Desk	SOFTWARE
R-210623-0016	Request for Guest WiFi access	OPEN	Service Desk	SOFTWARE
R-210623-0015	Request for Guest WiFi access	OPEN	Service Desk	SOFTWARE
R-210623-0014	Request for VPN	OPEN	Service Desk	SOFTWARE
R-210623-0013	Request for VPN	OPEN	Service Desk	SOFTWARE

1 - 10 of 709 items

Link Cancel

4. Click on  icon, which will display all open requests in a pop-up box. Agent can select requests and attach to request.
5. Click on Link
6. Linked ticket will be visible on Links tab.

**Request to Incident:** Request can be linked to Incident ticket


1. Navigate to request module
2. Open a relevant request ticket in edit mode
3. Move to **Links** tab and select Relation Type as **'Request to Incident'**

The screenshot shows the 'Edit Request' interface for request ID R-210621-0001. The 'Links' tab is active, displaying a table with columns for ID, Status, Relation Type, Assignment Group, and Category. A dropdown menu is open for the 'Relation Type' field, listing options: Request to Request, Request to Incident, Request to Change, Request to Problem, and Request to Knowledgebase.

The 'Link To' pop-up box displays a list of open incidents. The table has columns for ID, Title, Status, Assignment Group, and Category. The first few rows are:

ID	Title	Status	Assignment Group	Category
IN-210624-0014	Test Mail to check Email Notificatio...	OPEN	Service Desk	PHONE
IN-210624-0005	HARDWARE / LAPTOP / LENOVO- X...	OPEN	Service Desk	HARDWARE
IN-210624-0004	HARDWARE / LAPTOP / LENOVO- X...	OPEN	Service Desk	HARDWARE
IN-210623-0004	Test Mail to check Email Notificatio...	OPEN	Service Desk	PHONE
IN-210623-0003	web conference not connecting	OPEN	Server Support L2	SOFTWARE
IN-210622-0027	Server Printer not working	OPEN	Server Support	HARDWARE
IN-210622-0026	Application Slowness Issue, Applic...	OPEN	Server Support L2	SOFTWARE
IN-210622-0025	Test Mail to check Email Notificatio...	OPEN	Service Desk	PHONE
IN-210622-0024	Test Mail to check Email Notificatio...	OPEN	Service Desk	PHONE
IN-210622-0023	Test Mail to check Email Notificatio...	OPEN	Service Desk	PHONE

At the bottom of the pop-up, there are 'Link' and 'Cancel' buttons.

4. Click on  icon, which will display all open incidents in a pop-up box. Agent can select incidents and attach to request.
5. Click on Link
6. Linked ticket will be visible on Links tab.

**Request to Change:** Request can be linked to Change ticket

1. Navigate to request module
2. Open a relevant request ticket in edit mode
3. Move to **Links** tab and select Relation Type as **'Request to Change'**

Enter ticket number and search...

Edit Request - R-210621-0001

Update Action Search Related Items View Attachment(s)

Ticket Details Activity Log Task (0) Approval (0) **Links (0)** Schedules (0) More Info Impacted CI (0) Interaction (0) Fulfillment

Relation Type: Choose one

- Request to Request
- Request to Incident
- Request to Change
- Request to Problem
- Request to Knowledgebase

ID	Status	Relation Type	Assignment Group	Category


Link To

Search

ID	Title	Status	Assignment Group	Category
CR-210625-0002	Software / Microsift / excel	OPEN	Service Desk	Software
CR-210625-0001	OUTLOOK / UNABLE TO SEND MAILS	OPEN	Service Desk	Software
CR-210624-0003	RAM Upgrade	OPEN	Service Desk	Software
CR-210624-0002	jagadeep.vudatha@gmail.com	OPEN	Service Desk	Software
CR-201217-0001	Upgrade Network Bandwidth	OPEN	Service Desk	HARDWARE

1 - 5 of 5 items

Link Cancel

4. Click on  icon, which will display all open changes in a pop-up box. Agent can select changes and attach to request.
5. Click on Link
6. Linked ticket will be visible on Links tab

**Request to Problem:** Request can be linked to Problem ticket

1. Navigate to request module
2. Open a relevant request ticket in edit mode
3. Move to **Links** tab and select Relation Type as **'Request to Problem'**

Enter ticket number and search...

Edit Request - R-210621-0001

Update Action Search Related Items View Attachment(s)

Ticket Details Activity Log Task (0) Approval (0) **Links (0)** Schedules (0) More Info Impacted CI (0) Interaction (0) Fulfillment

Relation Type: Choose one

- Request to Request
- Request to Incident
- Request to Change
- Request to Problem
- Request to Knowledgebase

ID	Status	Relation Type	Assignment Group	Category


Link To

Search

ID	Title	Status	Assignment Group	Category
PR-210624-0003	Application Slowness Issue	KNOWN ERROR	Service Desk	SOFTWARE
PR-210624-0002	Exchange Server Down	RESOLVED	Service Desk	SYSTEM
PR-200825-0001	Intermittent Network Issue	PROGRESSING	Service Desk	HARDWARE
PR-200709-0004	Unable to connect mail server	OPEN	Service Desk	IT SERVICES
PR-200709-0003	Unable to connect mail server	OPEN	Service Desk	IT SERVICES
PR-200511-0008	Intermittent network connection	OPEN	Service Desk	HARDWARE

1 - 6 of 6 items

Link Cancel

4. Click on  icon, which will display all open problems in a pop-up box. Agent can select problems and attach to request.
5. Click on Link
6. Linked ticket will be visible on Links tab

**Request to Knowledgebase:** Request can be linked to Knowledge Article


1. Navigate to request module
2. Open a relevant request ticket in edit mode
3. Move to **Links** tab and select Relation Type as **Request to Knowledgebase**


The screenshot shows the 'Edit Request' interface for ticket R-210621-0001. The 'Links' tab is active, showing a table with columns for ID, Status, Relation Type, Assignment Group, and Category. A dropdown menu for 'Relation Type' is open, listing options: Request to Request, Request to Incident, Request to Change, Request to Problem, and Request to Knowledgebase.

The screenshot shows the 'Link To' pop-up box with a search bar and a table of articles. The table has columns for ID, Title, Status, Assignment Group, and Category. The first row is highlighted.

ID	Title	Status	Assignment Group	Category
KB-210614-0001	Unable to Sign PDF	LIVE	Service Desk	SYSTEM
KB-201022-0001	How to Download & Install Java JD...	LIVE	Service Desk	PHONE
KB-201020-0003	How to Set Up Microsoft Teams	LIVE	Service Desk	SOFTWARE
KB-200710-0002	Printer/Scanning - HP Printer/Scan...	LIVE	Service Desk	HARDWARE
KB-200618-0003	Install Visual Studio	LIVE	Server Support L2	SOFTWARE
KB-200618-0002	Access Network Folder	LIVE	Server Support L2	IT SERVICES
KB-200616-0010	How to stop the client from installing	LIVE	Service Desk	SOFTWARE
KB-200616-0009	Secure network time protocol (NTP)	LIVE	Service Desk	SOFTWARE
KB-200616-0006	Leave Computers Running Overnigh...	LIVE	Service Desk	HARDWARE
KB-200616-0005	Printer/Scanning - HP Printer/Scan	LIVE	Service Desk	HARDWARE

At the bottom of the pop-up, there are 'Link' and 'Cancel' buttons.

4. Click on  icon, which will display all articles in a pop-up box. Agent can select article and attach to request.
5. Click on Link
6. Linked ticket will be visible on Links tab

**Detach Ticket:** The agent can detach a linked incident or any other ticket by selecting a ticket and clicking on the  Delete button.

## APPROVALS

If a ticket requires formal approval before proceeding the case, Agent can create an approval manually by clicking on **Approval** → **Create New**.

Enter all \* marked following mandatory fields.

**Edit Request - R-210621-0001** Update Action Search Related Items View Attachment(s)

Ticket Details Activity Log Task (1) **Approval (0)** Links (0) Schedules (0) More Info Impacted CI (0) Inte

» **Approval** Create New Detach Approval

Approval ID	Status	Comments	Sequence Of	Approval

**Create Approval** Add Attachment Submit X

Approval For: R-210621-0001 **Status \***: OPEN **Approval Group \***: Choose one **Approver**: Choose one

Submitted Date: 06/21/2021 16:56:59 **Sequence Of \***: 1

**Comments \***

Paragraph **B I @ :: ;=** **≡ ≡** **📷 🗨 📅 📺 ↶ ↷**

Submit Cancel

On submitting a request for approval, approver will receive an approval mail with a link to approve or reject the request.

**Edit Approval - AP-210625-0008** Add Attachment View Attachment(s) X

Approval For: R-210621-0001 **Status \***: OPEN **Approval Group \***: Regional Approval Group **Approver**: Jagadeep Vudatha New Text Document.txt

Submitted Date: 06/25/2021 20:26:15 **Sequence Of \***: 1

**Approver Comments \***

Paragraph **B I @ :: ;=** **≡ ≡** **📷 🗨 📅 📺 ↶ ↷**

**Comments \***

Paragraph **B I @ :: ;=** **≡ ≡** **📷 🗨 📅 📺 ↶ ↷**

Provide approval

Approve Reject Update Cancel

All linked approvals will visible under Approval Tab. If the logged in user is a managerial user, then he can open the approval and click on **Approve** or **Reject**.

To detach any approval, click on **'Detach Approval'**.

Edit Request - R-210621-0001

Ticket Details | Activity Log | Task (0) | **Approval (1)** | Links (0) | Schedules (0) | More Info | Impacted CI (0) | Inte >

» Approval Create New | Detach Approval

Approval ID	Status	Comments	Sequence Of	Approval
<a href="#">AP-210625-0008</a>	OPEN	Provide approval	1	Regional / ^

Request will be non-editable and cannot be resolved until all approvals are approved.

### MORE INFO

Tab provides information regarding onsite visits and Escalations.

Edit Request - R-210621-0001

Update | Action | Search Related Items | View Attachment(s)

Ticket Details | Activity Log | Task (1) | Approval (0) | Links (0) | Schedules (0) | **More Info** | Impacted CI (0) | Inte >

» More Info

On Site: month/day/year hours:minutes:seco ...

1st Response: month/day/year hours:minutes:seco ...

Time To Resolve: month/day/year hours:minutes:seco ...

Escalation TS: month/day/year hours:minutes:seco ...

Misroute TS: month/day/year hours:minutes:seco ...

Email Response: month/day/year hours:minutes:seco ...

Time To Investigate: month/day/year hours:minutes:seco ...

Time To Diagnosis: month/day/year hours:minutes:seco ...

### IMPACTED CI

Related configuration items can be added under 'Impacted CI' tab.

Edit Request - R-210621-0001

Update | Action | Search Related Items | View Attachment(s)

Ticket Details | Activity Log | Task (1) | Approval (0) | Links (0) | Schedules (0) | More Info | **Impacted CI (0)** | Inte >

» Impacted CI Add New | Link Existing CI | Detach CI

ID	Name	Type	Serial No.	Model No
----	------	------	------------	----------

**Add New**- Allows to create a new CI and link to request.



**Create New CI**
[Add Attachment](#) [Submit](#) ✕

**Client Name \***

**Requestor Name \***

**Location \***

**Contact No.**

**CI Name \***

**CI Type \***

**Status \***

**Assignment Group \***

**Technician Name**

**Alternate Location**

**Alternate Contact**

**Short Description**

**Additional Comments**

Paragraph ▾
**B I**

**Link Existing CI-** On clicking link existing CI, displays all available CI and agent can select related CI and link to request.

**Link To**
✕

**CI Type \***

**Search Text**

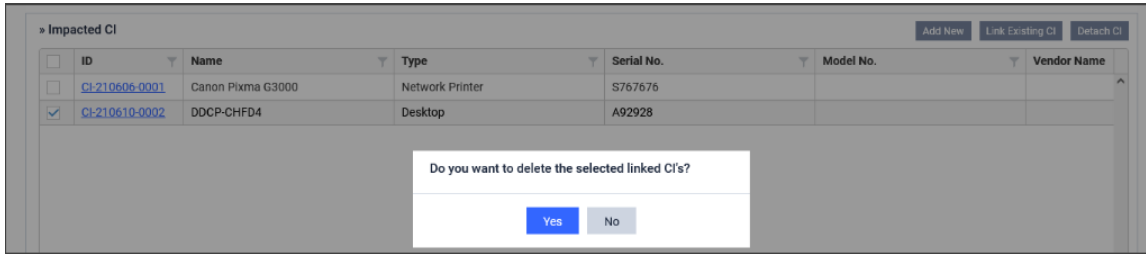
[Search](#)

<input type="checkbox"/>	ID	Name	Type	Requestor Name	Vendor Name	Serial Number	Model No.	Client	Created By
<input type="checkbox"/>	CI-210610-0001	Desktop CI	Desktop	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210605-0001	LAP-090909	Laptop CI	Jagadeep Vudatha				Allied	Jagadeep Vudatha
<input type="checkbox"/>	CI-210526-0041	ABCABCINESDFC MDB0	Server	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210526-0040	ABCABCUSESUPWEB04	Server	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210526-0039	ABCABCINESDFITSM0	Server	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210526-0038	ABCABCUSESUPWEB03	Server	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210526-0037	ABCABCUSESUPWEB05	Server	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210526-0036	ABCABCUSESUPWEB06	Server	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210526-0035	ABCABCUSESUPDEV01	Server	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210526-0034	ABCABCUSESUPWEB07	Server	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210526-0033	ABCABCUSESUPWEB01	Server	SYSTEM.ADMIN				Allied	

1 2 3
1 - 25 of 52 items

[Link](#)
[Cancel](#)

**Detach CI-** Linked CI can be detached by clicking on 'Detach CI'.

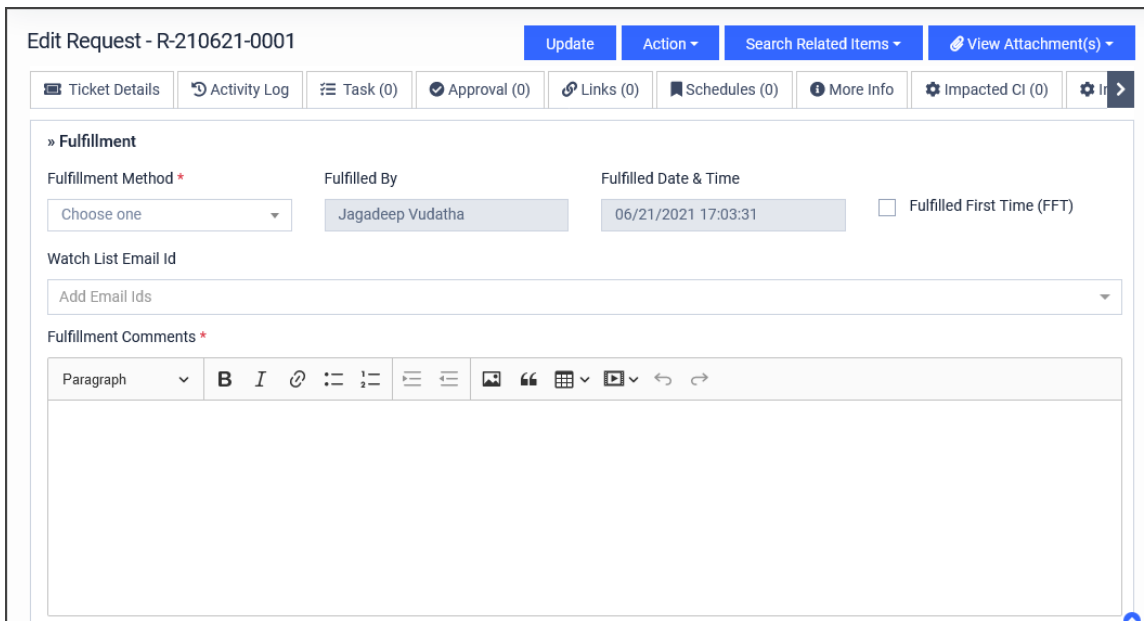


## REQUEST FULFILLMENT

The fulfillment tab fields will be enabled once **Fulfilled Status** has been selected from the status dropdown.

The agent need to specify **Fulfillment Method** from the dropdown. If ticket SLA is breached then it is mandatory to enter reason for SLA breach.

Enter fulfillment comments and click on update.



## VIEW SUBMITTED SURVEY

Go to respective request record and click on survey button to view the submitted survey.

Survey
Update
Action ▾
Search Related Items ▾

Links (0)
Schedules (0)
More Info
Impacted CI (0)
Impacted CI (0)

**Location \***

**Contact No.**

### VIEW SURVEY REPORTS

3. Go to **Report Catalog** module from main menu and navigate to **Survey Reports** widget.
4. Click on **Survey Reports** to view the survey analysis.

The screenshot shows the AdiTaaS dashboard interface. On the left, the 'Reporting' menu is highlighted, with 'Report Catalog' selected. The main area displays several report widgets:

- SLA**: Requests within SLA vs Violated
- Archive Reports**: Archived Incidents, Archived Problems
- Master Data**: Incoming Tickets By Month
- Pink Verify**: All Incidents Report\_Pink\_Verify, Pink Verify Review Report, Problem Incident Trend (Tabular), Problem Incident Trend(Summary)
- Incident Matrix Reports**: Incident Status By Category
- Incident Raw Data Reports**: Incident Tickets by Status, Incidents by Assignment Group, Resolved/Closed Incidents by Category, Resolved/Closed/Rejected Incidents
- Survey Reports**: Survey Report
- Trending Reports**: Incident Category Change Analysis, Incident Reassignment Analysis, Monthly Incident Ticket Trend, Monthly Problem Ticket Trend

Survey Report										
										Action ▾
										50 ▾
										Search
ID	Contact Name	Opened On	Survey Rating	Category	Sub Category	Item	Resolved On	Resolved By	Submitted On	
IN-210625-0006	Jagadeep Vudatha	06/25/2021 09:55:23	4	SOFTWARE	OUTLOOK	UNABLE TO SEND MAILS	06/25/2021 09:55:07	Jagadeep Vudatha	06/25/2021 10:05	
IN-210625-0006	Jagadeep Vudatha	06/25/2021 09:55:23	5	SOFTWARE	OUTLOOK	UNABLE TO SEND MAILS	06/25/2021 09:55:07	Jagadeep Vudatha	06/25/2021 10:05	
IN-210625-0006	Jagadeep Vudatha	06/25/2021 09:55:23	5	SOFTWARE	OUTLOOK	UNABLE TO SEND MAILS	06/25/2021 09:55:07	Jagadeep Vudatha	06/25/2021 10:05	
IN-210625-0006	Jagadeep Vudatha	06/25/2021 09:55:23	5	SOFTWARE	OUTLOOK	UNABLE TO SEND MAILS	06/25/2021 09:55:07	Jagadeep Vudatha	06/25/2021 10:05	
IN-210625-0006	Jagadeep Vudatha	06/25/2021 09:55:23	5	SOFTWARE	OUTLOOK	UNABLE TO SEND MAILS	06/25/2021 09:55:07	Jagadeep Vudatha	06/25/2021 10:05	
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	5	HARDWARE	LAPTOP	LENOVO- X1 YOGA		N/A	10/12/2020 16:15	
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	2	HARDWARE	LAPTOP	LENOVO- X1 YOGA		N/A	10/12/2020 16:15	
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	5	HARDWARE	LAPTOP	LENOVO- X1 YOGA		N/A	10/12/2020 16:15	
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	5	HARDWARE	LAPTOP	LENOVO- X1 YOGA		N/A	10/12/2020 16:15	
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	2	HARDWARE	LAPTOP	LENOVO- X1 YOGA		N/A	10/12/2020 16:15	
IN-210609-0013	Jagadeep Vudatha	06/09/2021 10:23:57	4	HARDWARE	PERIPHERALS AND COMPONENTS	PRIVACY SCREEN REQUEST	06/09/2021 10:23:33	Jagadeep Vudatha	06/09/2021 12:05	
IN-210609-0013	Jagadeep Vudatha	06/09/2021 10:23:57	5	HARDWARE	PERIPHERALS AND COMPONENTS	PRIVACY SCREEN REQUEST	06/09/2021 10:23:33	Jagadeep Vudatha	06/09/2021 12:05	
IN-210609-0013	Jagadeep Vudatha	06/09/2021 10:23:57	4	HARDWARE	PERIPHERALS AND COMPONENTS	PRIVACY SCREEN REQUEST	06/09/2021 10:23:33	Jagadeep Vudatha	06/09/2021 12:05	
IN-210609-0013	Jagadeep Vudatha	06/09/2021 10:23:57	5	HARDWARE	PERIPHERALS AND COMPONENTS	PRIVACY SCREEN REQUEST	06/09/2021 10:23:33	Jagadeep Vudatha	06/09/2021 12:05	
IN-210609-0013	Jagadeep Vudatha	06/09/2021 10:23:57	5	HARDWARE	PERIPHERALS AND COMPONENTS	PRIVACY SCREEN REQUEST	06/09/2021 10:23:33	Jagadeep Vudatha	06/09/2021 12:05	
Count: 75										
1 - 50 of 75 items										

## CHANGE REQUEST STATUS

To change the status

1. Open the request record in edit mode
2. From the drop down menu of the Status field, select the required status.

3. Upon selecting the status, tool will prompt to enter reason for status change.
4. Click on Submit.

Below are the available statuses for request record

- ❖ **‘OPEN’**: "This status is the default assignment value for all newly created request, before they are assigned to a support group or individual for action".
- ❖ **‘PROGRESSING’**: "Change to this status, when you begin work on the request".
- ❖ **‘PEND 3RDPARTY’**: "Some type of action or information is required from a third party vendor".
- ❖ **‘PEND CLIENT’**: "Some type of action or information is required from the end-client or contact".

- ❖ **‘REJECTED’**: "Change to this status if work on the request is false or duplicate record".
- ❖ **‘UNDER OBSERVATION’**: "The request is ongoing issue and must be analyzed before further action can take place".
- ❖ **‘ASSIGNED’** – “When request record is assigned to a support group or individual for action”.
- ❖ **‘APPROVED’** – “When approver has approved the approval record”.
- ❖ **‘FULFILLED’**: "Change to this status when you have to fulfill the Request”.
- ❖ **‘CLOSED’**- Change to this status when you have to close the request

Request record can also auto close after defined period mentioned in notification rule engine

### VIEW CI DETAILS FROM REQUEST PAGE

Displays CI details, related tickets, CI history and graphical view of CI relationship. If any specific CI is linked to other CI then relationship will be displayed in next level.

**Create Request** Common Requests

Client Name *	Requestor Name *	Location	Contact No.
<input type="text" value="Allied"/>	<input type="text" value="Priya Lewis"/>	<input type="text" value="Mahape"/>	<input type="text" value="0802545432"/>
Category/Sub Category/Item *	Status *	Impact *	
<input type="text"/>	<input type="text" value="OPEN"/>	<input type="text" value="LOW"/>	
Urgency *	Priority *	Channel *	Assignment Group *
<input type="text" value="LOW"/>	<input type="text" value="P4"/>	<input type="text" value="PHONE"/>	<input type="text" value="Choose one"/>
Technician Name	Configuration Item	Alternate Contact	Alternate Location
<input type="text" value="Choose one"/>	<input type="text" value="CI-210526-0011"/>	<input type="text"/>	<input type="text"/>
Vendor Ticket Number	Opened By	Opened Date	
<input type="text"/>	<input type="text" value="Jagadeep Vudatha"/>	<input type="text" value="06/30/2021 14:35:28"/>	

**ADCP-CHFD2\_D (CI-210526-0011) Details** ✕

Client Name *	Requestor Name *	Location *	Contact No.
<input type="text" value="Allied"/>	<input type="text" value="SYSTEM.ADMIN"/>	<input type="text" value="Mahape"/>	<input type="text"/>
CI Name *	CI Type *	Status *	
<input type="text" value="ADCP-CHFD2_D"/>	<input type="text" value="Desktop"/>	<input type="text" value="OPEN"/>	
Assignment Group *	Technician Name	Alternate Contact	Alternate Location
<input type="text" value="Service Desk"/>	<input type="text" value="Choose one"/>	<input type="text"/>	<input type="text" value="Choose one"/>
Created By	Created On		
<input type="text"/>	<input type="text" value="05/26/2021 17:07:43"/>		
Short Description			
<input type="text" value="ADCP-CHFD2"/>			
Additional Comments			
<input type="text"/>			

**ADCP-CHFD2\_D (CI-210526-0011) Details** ✕

CI's Details | **CI's Related Tickets (3)** | CI's History | Relationship Graph

ID	Status	Requestor Name	Assignment Group	Technician Name	Category	Sub Category	Item	Priority
<a href="#">IN-210625-0001</a>	OPEN	Priya Lewis	Network Support L2		HARDWARE	LAPTOP	LENOVO- X1 YOGA	P4
<a href="#">PR-210603-0001</a>	OPEN	Jagadeep Vudatha	Service Desk		SYSTEM	MONITORING	ALERT	P4
<a href="#">PR-210525-0001</a>	CLOSED	Deepak Shukla	Service Desk		SYSTEM	MONITORING	ALERT	P1

1 - 3 of 3 items

- CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**

CI Name :- ABCABCUSESUPWEB04 (CI-210526-0040) is attached with this CI
- CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**

CI Name :- ABCABCINESDFCMB0 (CI-210526-0041) is attached with this CI
- CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**


CI Name :- Canon Pixma G3000 (CI-210606-0001) is attached with this CI
- CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**

CI Name :- Desktop CI (CI-210610-0001) is attached with this CI
- CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**

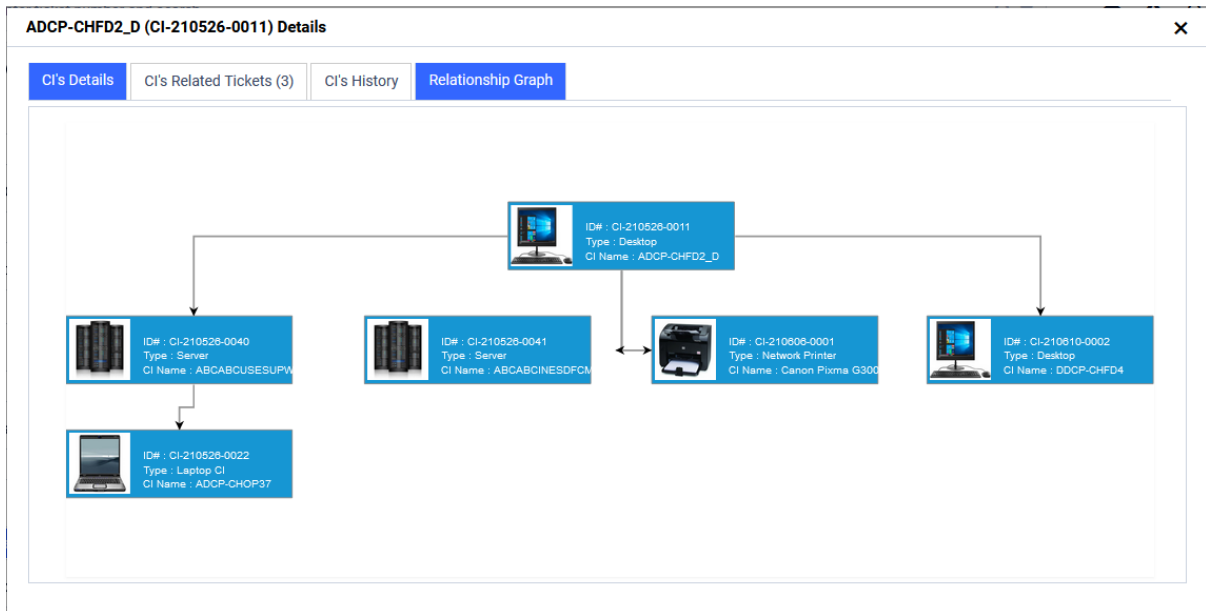
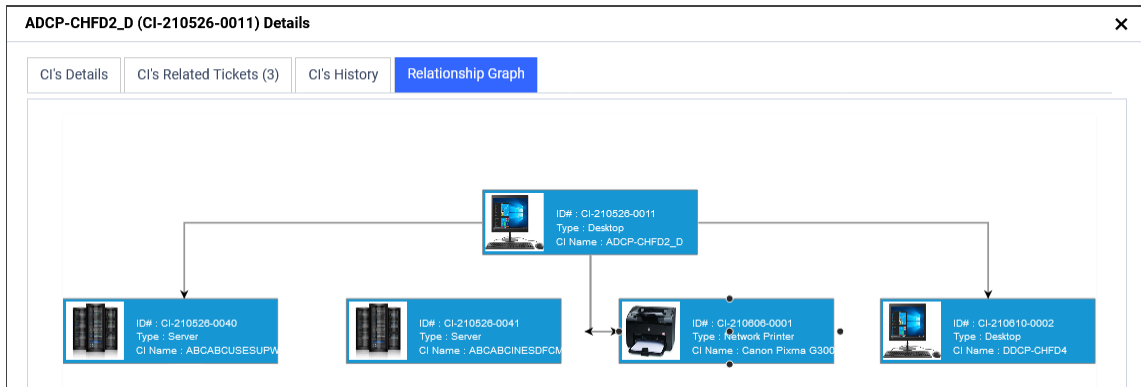
CI Name :- DDCP-CHFD4 (CI-210610-0002) is attached with this CI

**ADCP-CHFD2\_D (CI-210526-0011) Details** ✕

CI's Details | CI's Related Tickets (3) | CI's History | **Relationship Graph**



ID# : CI-210526-0011  
Type : Desktop  
CI Name : ADCP-CHFD2\_D



## VIEW SLA INFORMATION

(**i**) icon beside the priority displays information regarding assigned Priority.

**Priority \***

P4 **i**

**Priority Details**

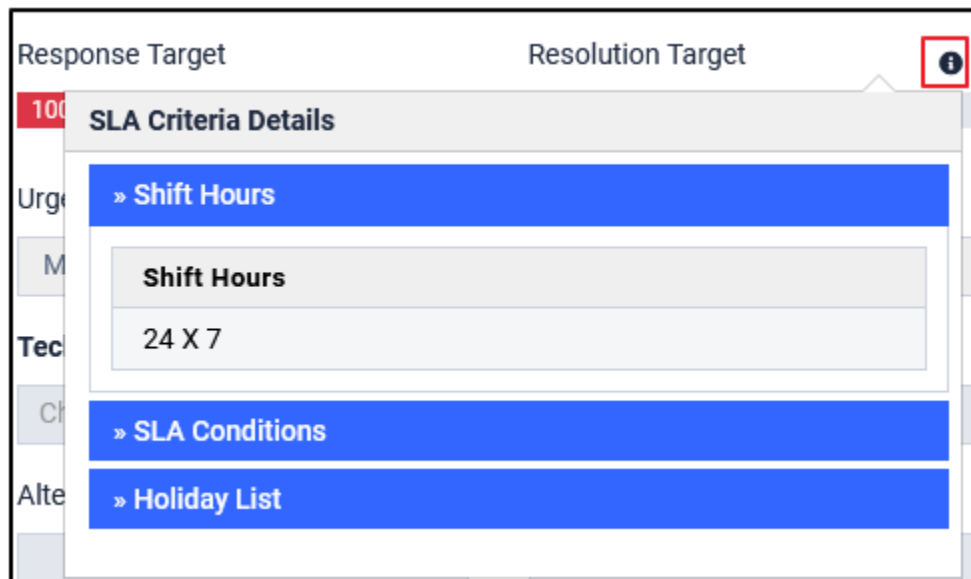
**Response Time**  
65

**Resolution Time**  
650

**Priority Definition**  
Scheduled: Work that has been scheduled in advance with the customer. Low: A minor service issue or general inquiry.

There are two graphical bar provided in tool to get a graphical view of SLA. **Response Target** and **Resolution Target** bar.

(  ) icon placed next Resolution Target bar displays SLA criteria details.



The screenshot shows a dialog box titled "SLA Criteria Details" with a red "100" status indicator. It contains three expandable sections: "Shift Hours" (showing "24 X 7"), "SLA Conditions", and "Holiday List". An information icon (i) is highlighted in a red box in the top right corner of the dialog.

On mouse over SLA bar, SLA information displays with elapsed time and SLA status.



Response Target	Resolution Target <span style="float: right;">i</span>
100%	18%
Urgency *	<b>SLA for Resolution</b>
LOW	SLA Target (min) 650
Technician Name	SLA Actual Elapsed Time (min) 126
Choose one	SLA Status <b>IN-PROGRESS</b>
Alternate Location	SLA Start Time 06/21/2021 15:05:21
Vendor Ticket Number	SLA Target Time 06/22/2021 01:55:21

## SCHEDULED REQUEST

**Create Scheduled Request** - Scheduled ticket functionality benefits when there are some activities need to be executed at regular intervals. Once a ticket is scheduled, new ticket will be created and assigned to the specified support group automatically at the scheduled interval.

1. Navigate to Request Module and click on 'Create New'
2. Fill all \* marked mandatory fields and click on 'Schedule' instead of clicking on submit.

Submit
Schedule
Cancel

3. Displays scheduled dialog box, Select Scheduler Type, Schedule from Date & Time
4. Click on **Submit**

**Schedule** ✕

Once  
  Daily  
  Weekly  
  Monthly

Schedule On Days \*

Sunday  
  Monday  
  Tuesday  
  Wednesday  
 Thursday  
  Friday  
  Saturday

Schedule from Date & Time \*

06/21/2021 06:52:39

**Deactivate Scheduled Request** - Scheduled ticket can be mark as inactive by unchecking the **Is Active** checkbox.

1. Navigate to Request Module and click on **'Scheduled Requests'**
2. Click on respective scheduled ticket and uncheck **Is Active** checkbox
3. Click on **Update**

Scheduled Request						Action ▾	Column Visibility ▾	25 ▾	Search
Scheduled Id	Scheduled Type	Status	Scheduled Date & Time	Scheduled Details	Title				
<a href="#">SCH-201119-0010</a>	Monthly	Active	11/19/2020 12:06:01	November,December	CONFERENCE PHONE				
<a href="#">SCH-201119-0007</a>	Once	Active	11/19/2020 12:00:00		PRIVACY SCREEN 14"   HARDWARE				

## Problem Management

Problem Management supports to find and fix the root cause of issues that result in incidents. You can record problems, associate incidents, and assign them to appropriate groups. You can create knowledge from problems, request changes, escalate, and manage problems to its resolution and reporting.


### LOGGING PROBLEM

Problems can be created via a web application. Tool facilitate the opening of a Problem Record with open as well as Known Error status.

To create a new problem using the web application,

1. From Main Menu, go to **Problem** Module → Click on ‘**Create New**’
2. Displays a new Problem creation page
3. Enter all \* marked mandatory fields.
  - a. **Client Name**- This is a mandatory field and data is auto populated with client information.
  - b. **Requestor Name**- Mandatory field. Select contact details of user who has reported problem. If contact is not present in the application, then new contact can be created by using **add contact** feature. You can use search button to find the existing contact.
  - c. **Location**- Mandatory field. Auto populates user’s location from the system.
  - d. **Contact No**- Optional Field. Auto populates user’s contact number from the system.
  - e. **Preferred Contact**- Provides an option to select whether to send notification on primary or secondary contact.
  - f. **Notification Mode**- Tool provides an option to get notify by Email, SMS or Call.
  - g. **Status**- Mandatory field. There are different status available throughout the life cycle of Problem.
  - h. **Category/ Sub Category/ Item**- Mandatory fields. These fields helps to classify the type of Problem to be logged. Select the relevant category, subcategory and item to which Problem can be grouped.
  - i. **Priority**- Mandatory field .By default Problem priority is set to ‘P4’. Depend on impact and urgency of the Problem agent can change the priority.
  - j. **Impact**- Mandatory field .Ticket impact can change to ‘HIGH’, ‘MEDIUM’ or ‘LOW’ depend on the effect.
  - k. **Urgency** - Mandatory field .Ticket **Urgency** can change to ‘HIGH’, ‘MEDIUM’ or ‘LOW’ depend on the urgency.
  - l. **Channel**- Mandatory field .Channel indicates source through which Problem is logged. For e.g. Incident, Change, Request and Monitoring Tool.
  - m. **Assigned Group**- Mandatory field. Select appropriate support group to work on Problem.

- n. **Technician Name**- Agent can select the Technician from the list of agents from the selected Assigned Group which are displayed.
  - o. **Configuration Item**- Optional field. Related CI can be added to the ticket.
  - p. **Alternate Location**: Optional field. This field will be used to select any alternate location of the requestor of the ticket.
  - q. **Alternate Contact**: Optional field. This field will be used to enter any alternate contact number of the requestor of the ticket.
  - r. **Vendor Ticket Number**- Optional field. This field will be used to enter third party ticket id number if exists.
  - s. **Opened Date**: System auto captures date and time when Problem is created.
  - t. **Opened By**: System auto captures name of the agent/ end user who has created the Problem.
  - u. **RCA Date Identified**: Optional field. Agent can capture root cause is identified date.
  - v. **Problem Description**: Provide a relevant title to the Problem that will exactly summarize the Problem.
  - w. **Symptoms**: Provide a detailed description with any other associated details relevant to the Problem.
  - x. **Root Cause Analysis**: Enter Root cause analysis details.
  - y. **Root Cause Results**- Enter Root cause results.
  - z. **Is Major**-Indicates if problem is problem is a major Problem.
  - aa. **Problem Manager** – Displays list of problem manager. If problem is major problem, then Problem manager field gets mandatory.
  - bb. **No of users impacted**- Specify the number of users impacted.
  - cc. **Frequency of occurrence**- Mention number of times issue has occurred.
  - dd. **Business Impact**- Enter the business impact caused due to this issue.
4. Once all the required mandatory are filled, then click on **Submit** button.
  5. Click on **Add attachment** button to add attachment during the ticket creation
  6. New Problem ticket will be created with **unique Problem ID** and an email notification is sent to requestor to confirm that the ticket has been logged and an email notification will be sent to assignment group members as well.



**Jagadeep Vudatha**  
Practice Manager

- Request
- Knowledge
- Problem**
  - Create New
  - My Work (1)
  - My Group Work (37)
  - Known Errors (9)
  - Closed (27)
  - Rejected (1)
  - All Problems (66)
  - Major Problems (4)
  - Scheduled Problems (3)
  - Incident Trending
  - Calendar View
  - Archived Problems
  - All Problems

Enter ticket number and search...
🔍

**Create Problem**
Common Problems
Add Attachment
Submit
Search Related Items

<b>Client Name *</b>	<b>Requestor Name *</b>	<b>Location</b>	<b>Contact No.</b>
<input type="text" value="Allied"/>	<input type="text" value="Choose one"/>	<input type="text" value="Choose one"/>	<input type="text"/>
<b>Preferred Contact</b>	<b>Status *</b>	<b>Category/Sub Category/Item *</b>	
<input type="text" value="Primary"/>	<input type="text" value="OPEN"/>	<input type="text"/>	
<b>Impact *</b>	<b>Urgency *</b>	<b>Priority *</b>	<b>Assignment Group *</b>
<input type="text" value="LOW"/>	<input type="text" value="LOW"/>	<input type="text" value="Choose one"/>	<input type="text" value="Choose one"/>
<b>Technician Name</b>	<b>Configuration Item</b>	<b>Channel *</b>	<b>Opened By</b>
<input type="text" value="Choose one"/>	<input type="text" value="Choose one"/>	<input type="text" value="Choose one"/>	<input type="text" value="Jagadeep Vudatha"/>
<b>Opened Date</b>	<b>Alternate Contact</b>	<b>Alternate Location</b>	<b>Vendor Ticket Number</b>
<input type="text" value="06/18/2021 15:29:21"/>	<input type="text"/>	<input type="text" value="Choose one"/>	<input type="text"/>
<b>RCA Date Identified</b>	<b>Notification Mode</b>	<b>Is Major *</b>	<b>Problem Manager</b>
<input type="text" value="month/day/year hours:"/>	<input type="text"/>	<input type="radio" value="No"/>	<input type="text" value="Choose one"/>

**Problem Description \***

**Symptoms**

Paragraph

**B I** | **☰ ☲** | **☰ ☲** | **📷** | **🗨** | **📅** | **↶ ↷**

**Root Cause Analysis**

Paragraph

**B I** | **☰ ☲** | **☰ ☲** | **📷** | **🗨** | **📅** | **↶ ↷**

**Additional Information**

**Root Cause Results**

<b>No. of users impacted</b>	<b>Frequency of occurrences</b>	<b>Business Impact</b>
<input type="text"/>	<input type="text"/>	<input type="text" value="Choose one"/>

Submit
Schedule
Cancel

Enter ticket number and search...
🔍

**Edit Problem - PR-210621-0001** Update Action Search Related Items

Ticket Details
Activity Log
Task (0)
Approval (0)
Links (0)
Known Error
Impacted CI (0)
Problem Closure

Client Name * Allied	Requestor Name * Priya Lewis	Location Mahape	Contact No. 0802545432
Preferred Contact Primary	Status * OPEN	Response Target %	Resolution Target %
Category/Sub Category/Item * SYSTEM/MONITORING/ALERT	Impact * LOW	Urgency * LOW	
Priority * P4	Assignment Group * Service Desk	Technician Name Choose one	Configuration Item Choose one
Channel * INCIDENT	Opened By Jagadeep Vudatha	Opened Date 06/21/2021 17:36:10	Alternate Contact
Alternate Location	Vendor Ticket Number	RCA Date Identified month/day/year hours:minutes:sec	Notification Mode
Is Major * <input type="radio"/> No	Problem Manager Choose one		

Problem Description \*  
Exchange Server Down

Symptoms

Exchange Server Down

Root Cause Analysis

Additional Information

Root Cause Results

No. of users impacted	Frequency of occurrences	Business Impact
<input type="text"/>	<input type="text"/>	Choose one

Update Cancel

## COMMON PROBLEMS

Creating individual form for each problem template for the most frequently raised problem such as, server down, Unable to send mails. The fields can be pre filled with values so that a problem can be created

instantly. Under Administration module all templates can be configured and during the problem creation all configured templates will be displayed under common problems drop down.

1. Navigate to **Problem Module** from left menu bar
2. Click on Create New, displays new Problem creation page
3. Select the required Create New template from **Common Problems** drop down
4. The fields will be pre filled with values
5. Enter the Requestor name and any additional information if any
6. Click on **Submit**

## PROBLEM DATA GRIDS

### My work/My Group Work

Agent can view open Problems which are assigned to him under 'My Work' and all the open Problems which are assigned to his groups are visible under 'Group Work' tab. Action in tab in data grids provides a feature to update multiple tickets at a time.

Go to Problem module → Click on 'My Work' or 'My Group Work'

ID	Title	Description	Requestor Name	Status	Assignment Group
PR-210621-0001	Exchange Server Down	Exchange Server Down	Priya Lewis	OPEN	Service Desk
PR-210618-0002	Intermittent Network Iss...	Intermittent Network Issue	Priya Lewis	OPEN	Server Support L2
PR-210610-0008	Known Error Problem	Known Error Problem	Jagadeep Vudatha...	KNOWN ERROR	Server Support L2
PR-210610-0007	Problem Ticket	Problem Ticket	Jagadeep Vudatha...	OPEN	Service Desk
PR-210610-0006	Intermittent Network Iss...	Intermittent Network Issue	Priya Lewis	PROGRESSING	Service Desk
PR-210610-0003	Exchange Server Down	Exchange Server Down	Priya Lewis	OPEN	Service Desk
PR-210610-0002	Ad account locked	Ad account locked	Priya Lewis	OPEN	Server Support L2
PR-210610-0001	Browser Compatibility Is...	Description*Browser Name...	Jagadeep Vudatha...	OPEN	Server Support L2
PR-210606-0004	QA Server is down	QA Server is down	Priya Lewis	OPEN	Service Desk
PR-210606-0003	Internet outage	Internet outage	Priya Lewis	OPEN	Service Desk
PR-210605-0001	Printer not working	Laptop not working	Jagadeep Vudatha...	OPEN	Server Support L2
PR-210603-0001	Intermittent Network Iss...	Intermittent Network Issue	Jagadeep Vudatha...	OPEN	Service Desk

**Known Errors-** Displays list of all problem tickets marked as Known errors.

**Closed-** Displays list of all closed problems

**Rejected-** Displays list of rejected problems

**All Problems-** Displays list of all closed problems

**Major Problems-** Displays list of all problem marked as Major problems.

**Scheduled Problems-** Displays list of all scheduled problems

### Incident Trending

Incident Trending allow sorting by certain incident characteristics which demonstrate relatedness (such as related CI, assignment group, configuration item or configuration type).

By default incidents are group by category, sub category and item. Problem Manager can view all related tickets and click on Create Problem to pro-actively create a problem. Click on Discard to remove respective combination from the grid.

Category	Sub Category	Item	Ticket Count	Action
SOFTWARE	SOFTWARE INSTALLATION	ADOBE PHOTOSHOP	52	Create Problem Discard
SOFTWARE	SOFTWARE INSTALLATION	VS 2018	31	Create Problem Discard
SOFTWARE	ACTIVE DIRECTORY	ACCOUNT UNLOCK	112	Create Problem Discard
SOFTWARE	ACTIVE DIRECTORY	PASSWORD RESET	2	Create Problem Discard
SOFTWARE	APPLICATION	SLOWNESS ISSUE	10	Create Problem Discard
SOFTWARE	WEBAPP	COMPATIBILITY	5	Create Problem Discard
HARDWARE	REPLACEMENT	MACHINE SHIFT	453	Create Problem Discard
HARDWARE	LAPTOP	LENOVO- T570	21	Create Problem Discard
HARDWARE	LAPTOP	LENOVO- X1 YOGA	1	Create Problem Discard
HARDWARE	PRINTER	NOT WORKING	221	Create Problem Discard
HARDWARE	RELOCATION	SUPPORT	1	Create Problem Discard
HARDWARE	PERIPHERALS AND COMPONENTS	PRIVACY SCREEN REQUEST	1	Create Problem Discard
IT SERVICES	AUDIO/VIDEO	SETUP VIDEO CONFERENCE	23	Create Problem Discard
PHONE	MOBILE PHONE	IPHONE	7	Create Problem Discard



1. To configure dynamic trending list, click on **Action** → **Configure Trending**
2. Select require column names
3. Click on Ok

**Incident Trending**

Category	Sub Category	Item	Ticket Count	Action
SOFTWARE	SOFTWARE INSTALLATION	ADOBE PH...	2	Create Problem Discard
SOFTWARE	SOFTWARE INSTALLATION	VS 2018	1	Create Problem Discard
SOFTWARE	ACTIVE DIRECTORY	ACCOUNT UNLOCK	112	Create Problem Discard
SOFTWARE	ACTIVE DIRECTORY	PASSWORD RESET	2	Create Problem Discard
SOFTWARE	APPLICATION	SLOWNESS ISSUE	10	Create Problem Discard
SOFTWARE	WEBAPP	COMPATIBILITY	5	Create Problem Discard
HARDWARE	REPLACEMENT	MACHINE SHIFT	453	Create Problem Discard
HARDWARE	LAPTOP	LENOVO- T570	21	Create Problem Discard
HARDWARE	LAPTOP	LENOVO- X1 YOGA	1	Create Problem Discard
HARDWARE	PRINTER	NOT WORKING	221	Create Problem Discard
HARDWARE	RELOCATION	SUPPORT	1	Create Problem Discard
HARDWARE	PERIPHERALS AND COMPONENTS	PRIVACY SCREEN REQUEST	1	Create Problem Discard
IT SERVICES	AUDIO/VIDEO	SETUP VIDEO CONFERENCE	23	Create Problem Discard
PHONE	MOBILE PHONE	IPHONE	7	Create Problem Discard

**Configure Trending**

Select Trending Columns \*

- Category/Sub-Category/Item
- Assignment Group
- Requestor
- CI Name
- CI Type
- Channel

**Configure Trending**

Select Trending Columns \*

Category/Sub-Category/Item | Assignment Group

OK Cancel

Category	Sub Category	Item	Assignment Gro...	Customer Name	Ticket Count
SOFTWARE	SOFTWARE INSTALLATION	ADOBE PHOTOSHOP	Service Desk	Allied	26
SOFTWARE	SOFTWARE INSTALLATION	ADOBE PHOTOSHOP	Sagar Test -Group	Allied	19
				Allied	4
				Allied	3
				Allied	25
				Allied	5
				Allied	1
				Allied	111
SOFTWARE	ACTIVE DIRECTORY	ACCOUNT UNLOCK	OS Support	Allied	1
SOFTWARE	ACTIVE DIRECTORY	PASSWORD RESET	Service Desk	Allied	2

New trending list will be generated dynamically.

Category	Sub Category	Item	Assignment Gro...	Ticket Count
SOFTWARE	SOFTWARE INSTALLATION	ADOBE PHOTOSHOP	Service Desk	26
SOFTWARE	SOFTWARE INSTALLATION	ADOBE PHOTOSHOP	Accounting Support	4
SOFTWARE	SOFTWARE INSTALLATION	ADOBE PHOTOSHOP	Audio / Video Supp...	3
SOFTWARE	SOFTWARE INSTALLATION	VS 2018	Service Desk	25
SOFTWARE	SOFTWARE INSTALLATION	VS 2018	Audio / Video Supp...	1
SOFTWARE	ACTIVE DIRECTORY	ACCOUNT UNLOCK	Service Desk	111
SOFTWARE	ACTIVE DIRECTORY	ACCOUNT UNLOCK	OS Support	1
SOFTWARE	ACTIVE DIRECTORY	PASSWORD RESET	Service Desk	2
SOFTWARE	APPLICATION	SLOWNESS ISSUE	Service Desk	8
SOFTWARE	APPLICATION	SLOWNESS ISSUE	OS Support	1
SOFTWARE	APPLICATION	SLOWNESS ISSUE	Accounting Support	1
SOFTWARE	WEBAPP	COMPATIBILITY	Service Desk	4
SOFTWARE	WEBAPP	COMPATIBILITY	Audio / Video Supp...	1

On clicking on Discard button, tool will throw a confirmation message. On clicking yes, respective combination of records will be removed from the trending list.

Category	Sub Category	Item	Assignment Gro...	Ticket Count
SOFTWARE	SOFTWARE INSTALLATION	ADOBE PHOTOSHOP	Service Desk	26
SOFTWARE	SOFTWARE INSTALLATION	ADOBE PHOTOSHOP	Accounting Support	4
SOFTWARE	SOFTWARE INSTALLATION	ADOBE PHOTOSHOP	Audio / Video Supp...	3
SOFTWARE	SOFTWARE INSTALLATION	VS 2018	Service Desk	25
SOFTWARE	SOFTWARE INSTALLATION	VS 2018	Audio / Video Supp...	1
SOFTWARE	ACTIVE DIRECTORY	ACCOUNT UNLOCK	Service Desk	111
SOFTWARE	ACTIVE DIRECTORY	ACCOUNT UNLOCK	OS Support	1
SOFTWARE	ACTIVE DIRECTORY	PASSWORD RESET	Service Desk	2
SOFTWARE	APPLICATION	SLOWNESS ISSUE	Service Desk	8
SOFTWARE	APPLICATION	SLOWNESS ISSUE	OS Support	1
SOFTWARE	APPLICATION	SLOWNESS ISSUE	Accounting Support	1

The screenshot shows the 'Incident Trending' interface. A dialog box is displayed in the center asking 'Do you want to Discard this Incident Trending?' with 'Yes' and 'No' buttons. The background table lists incidents with columns for Category, Sub Category, Item, Assignment Group, and Ticket Count.

Category	Sub Category	Item	Assignment Gro...	Ticket Count
SOFTWARE	SOFTWARE INSTALLATION	ADOBE PHOTOSHOP	Service Desk	26
SOFTWARE	SOFTWARE INSTALLATION	ADOBE PHOTOSHOP	Accounting Support	4
SOFTWARE	SOFTWARE INSTALLATION	ADOBE PHOTOSHOP	Audio / Video Supp...	3
SOFTWARE	SOFTWARE INSTALLATION	VS 2018	Service Desk	25
SOFTWARE	SOFTWARE INSTALLATION	VS 2018	Audio / Video Supp...	1
SOFTWARE	ACTIVE DIRECTORY	ACCOUNT UNLOCK	Service Desk	111
SOFTWARE	ACTIVE DIRECTORY	ACCOUNT UNLOCK	OS Support	1
SOFTWARE	ACTIVE DIRECTORY	PASSWORD RESET	Service Desk	2

This screenshot shows the 'Incident Trending' interface with a different set of incidents. The table columns are the same as in the previous screenshot.

Category	Sub Category	Item	Assignment Gro...	Ticket Count
SOFTWARE	SOFTWARE INSTALLATION	ADOBE PHOTOSHOP	Accounting Support	4
SOFTWARE	SOFTWARE INSTALLATION	ADOBE PHOTOSHOP	Audio / Video Supp...	3
SOFTWARE	SOFTWARE INSTALLATION	VS 2018	Service Desk	25
SOFTWARE	SOFTWARE INSTALLATION	VS 2018	Audio / Video Supp...	1
SOFTWARE	ACTIVE DIRECTORY	ACCOUNT UNLOCK	Service Desk	111
SOFTWARE	ACTIVE DIRECTORY	ACCOUNT UNLOCK	OS Support	1

**Calendar View-** Displays scheduled problems, set reminders on calendar view.

**Archived Problems-** Displays all archived Problems

### View Archived Problems

1. Navigate to Problem module from left menu bar
2. Click on Archived Problems

The screenshot displays the 'Archived Problems' report. The table contains the following data:

ID	Assignment Group	Created By	Opened On	Contact Name	Location	Category	Sub-Category
PR-200402-0014	Service Desk	Jagadeep Vudatha	04/02/2020 12:14:00	Jagadeep Vudatha	N/A	HARDWARE	REPLACEMENT
PR-200401-0001	Service Desk	Jagadeep Vudatha	04/01/2020 10:31:00	Jagadeep Vudatha	N/A	HARDWARE	REPLACEMENT
PR-200409-0001	Service Desk	Jagadeep Vudatha	04/09/2020 10:54:42	Priya Lewis	N/A	SOFTWARE	SOFTWARE IN
PR-200401-0003	Service Desk	Jagadeep Vudatha	04/01/2020 11:11:59	James Baker	N/A	HARDWARE	REPLACEMENT
PR-200519-0003	Service Desk	Jagadeep Vudatha	05/19/2020 11:39:10	Vedantha Shukla	N/A	HARDWARE	REPLACEMENT
PR-200401-0002	Service Desk	Jagadeep Vudatha	04/01/2020 10:36:52	Jagadeep Vudatha	N/A	HARDWARE	REPLACEMENT
PR-200618-0001	Server Support L2	Priya Lewis	06/18/2020 17:24:14	Priya Lewis	Mahape	IT SERVICES	AUDIO/VIDEO
PR-200302-0001	Service Desk	Priya Lewis	03/02/2020 17:39:56	Priya Lewis	N/A	SOFTWARE	SOFTWARE IN

### View Archived Problems Report

1. Navigate to Reporting module from left menu bar
2. Click on Report Catalog
3. Move to Archived Reports Widgets
4. Select Archived Problem Report to view all archived Problem records

ID	Assignment Group	Created By	Opened On	Contact Name	Location	Category	Sub-Category
PR-200519-0002	Service Desk	jvudatha	05/19/2020 11:34:39	Deepak_2 Shukla	N/A	SOFTWARE	SOFTWARE INSTALI
PR-200401-0003	Service Desk	jvudatha	04/01/2020 11:11:59	James Baker	N/A	HARDWARE	REPLACEMENT
PR-200519-0003	Service Desk	jvudatha	05/19/2020 11:39:10	Deepak_2 Shukla	N/A	HARDWARE	REPLACEMENT
PR-200401-0001	Service Desk	jvudatha	04/01/2020 10:31:00	Jagadeep Vudatha	N/A	HARDWARE	REPLACEMENT
PR-200401-0002	Service Desk	jvudatha	04/01/2020 10:36:52	Jagadeep Vudatha	N/A	HARDWARE	REPLACEMENT
PR-200409-0001	Service Desk	jvudatha	04/09/2020 10:54:42	Priya Lewis	N/A	SOFTWARE	SOFTWARE INSTALI
PR-200302-0001	Service Desk	priya.lewis	03/02/2020 17:39:56	Priya Lewis	N/A	SOFTWARE	SOFTWARE INSTALI
PR-200402-0014	Service Desk	jvudatha	04/02/2020 12:14:00	Jagadeep Vudatha	N/A	HARDWARE	REPLACEMENT

### Restore Archived Records-

1. Navigate to Reporting module from left menu bar
2. Click on Report Catalog
3. Move to Archived Reports Widgets
4. Select Archived Problem Report to view all archived problem record
5. Select required tickets to be restore by clicking on checkbox and click on Action menu
6. Click on Restore Archive Data to restore the records

The dashboard features a left-hand navigation menu with the following items: Change, Release, Task, Interaction, CMDB, ChatBot, Live Chat, Intergration Hub, Visual Boards, Reporting, Report Catalog, Report Scheduler, Create New, and Administration. The 'Reporting' menu item is highlighted with a red box, and its sub-item 'Report Catalog' is also highlighted.

The main content area is divided into several panels:

- Task:** All Tasks, Completed Tasks, Open Tasks, Open Tasks By Assignee.
- Problem:** All Problems, All Problems, Completed Problems, Completed Problems By Priority.
- Approval:** Approvals By Approval Group, Approvals By Approver, Approvals By Modules, Approvals By Status.
- Change:** All Changes, All Changes (My), Change Report, Changes By Assignee.
- CMDB:** All CI Report, CI By Status, CI By Type, CI By User.
- Raw Data Report:** All Articles, Incident Status By Category, Tickets Created Today, Time Spent By Assignee (Current Month).
- SLA:** Requests within SLA vs Violated.
- Archive Reports:** Archived Incidents, Archived Problems (highlighted with a red box).
- Master Data:** Incoming Tickets By Month.

The 'Archived Problems' report displays a table with the following columns: ID, Assignment Group, Created By, Opened On, Contact Name, and Sub-Category. The table contains 8 rows of data. The first row is selected, and an 'Action' menu is open over it, showing options like Refresh Report, Save as Excel, Save as PDF, Send as Email, Delete Report, Schedule Report, Restore Archive Data (highlighted with a red box), and Edit Report.

ID	Assignment Group	Created By	Opened On	Contact Name	Sub-Category
PR-200519-0002	Service Desk	jvudatha	05/19/2020 11:34:39	Deepak_2 Shukla	SOFTWARE INSTALI
PR-200401-0003	Service Desk	jvudatha	04/01/2020 11:11:59	James Baker	REPLACEMENT
PR-200519-0003	Service Desk	jvudatha	05/19/2020 11:39:10	Deepak_2 Shukla	REPLACEMENT
PR-200401-0001	Service Desk	jvudatha	04/01/2020 10:31:00	Jagadeep Vudatha	REPLACEMENT
PR-200401-0002	Service Desk	jvudatha	04/01/2020 10:36:52	Jagadeep Vudatha	REPLACEMENT
PR-200409-0001	Service Desk	jvudatha	04/09/2020 10:54:42	Priya Lewis	SOFTWARE INSTALI
PR-200302-0001	Service Desk	priya.lewis	03/02/2020 17:39:56	Priya Lewis	SOFTWARE INSTALI
PR-200402-0014	Service Desk	jvudatha	04/02/2020 12:14:00	Jagadeep Vudatha	HARDWARE REPLACEMENT

Count: 8  
1 - 8 of 8 items

The screenshot shows the 'Archived Problems' page in the AdiTaaS interface. A modal dialog box is displayed in the center with the text 'Do you want to Restore Archive data?' and two buttons: 'Yes' and 'No'. The background table lists several archived problem records.

ID	Assignment Group	Created By	Opened On	Contact Name	Location	Category	Sub-Category
<input checked="" type="checkbox"/> PR-200519-0002	Service Desk	jvudatha	05/19/2020 11:34:39	Deepak_2 Shukla	N/A	SOFTWARE	SOFTWARE INSTALI
<input type="checkbox"/> PR-200401-0003	Service Desk	jvudatha	04/01/2020 11:11:59	James Baker	N/A	HARDWARE	REPLACEMENT
<input type="checkbox"/>						HARDWARE	REPLACEMENT
<input type="checkbox"/>						HARDWARE	REPLACEMENT
<input type="checkbox"/>						SOFTWARE	SOFTWARE INSTALI
<input type="checkbox"/> PR-200302-0001	Service Desk	priya.lewis	03/02/2020 17:39:56	Priya Lewis	N/A	SOFTWARE	SOFTWARE INSTALI
<input type="checkbox"/> PR-200402-0014	Service Desk	jvudatha	04/02/2020 12:14:00	Jagadeep Vudatha	N/A	HARDWARE	REPLACEMENT

The screenshot shows the 'Archived Problems' page after the restoration process. A green notification box at the bottom right displays a checkmark and the text 'Archive data restored successfully..'. The table now contains 7 records, and the 'Count' is updated to 7.

ID	Assignment Group	Created By	Opened On	Contact Name	Location	Category	Sub-Category
<input type="checkbox"/> PR-200401-0003	Service Desk	jvudatha	04/01/2020 11:11:59	James Baker	N/A	HARDWARE	REPLACEMENT
<input type="checkbox"/> PR-200519-0003	Service Desk	jvudatha	05/19/2020 11:39:10	Deepak_2 Shukla	N/A	HARDWARE	REPLACEMENT
<input type="checkbox"/> PR-200401-0001	Service Desk	jvudatha	04/01/2020 10:31:00	Jagadeep Vudatha	N/A	HARDWARE	REPLACEMENT
<input type="checkbox"/> PR-200401-0002	Service Desk	jvudatha	04/01/2020 10:36:52	Jagadeep Vudatha	N/A	HARDWARE	REPLACEMENT
<input type="checkbox"/> PR-200409-0001	Service Desk	jvudatha	04/09/2020 10:54:42	Priya Lewis	N/A	SOFTWARE	SOFTWARE INSTALI
<input type="checkbox"/> PR-200302-0001	Service Desk	priya.lewis	03/02/2020 17:39:56	Priya Lewis	N/A	SOFTWARE	SOFTWARE INSTALI
<input type="checkbox"/> PR-200402-0014	Service Desk	jvudatha	04/02/2020 12:14:00	Jagadeep Vudatha	N/A	HARDWARE	REPLACEMENT

Problems can also restore from **Problem Module** → **Archived Problems** data grid using **Restore Archive Data** action.

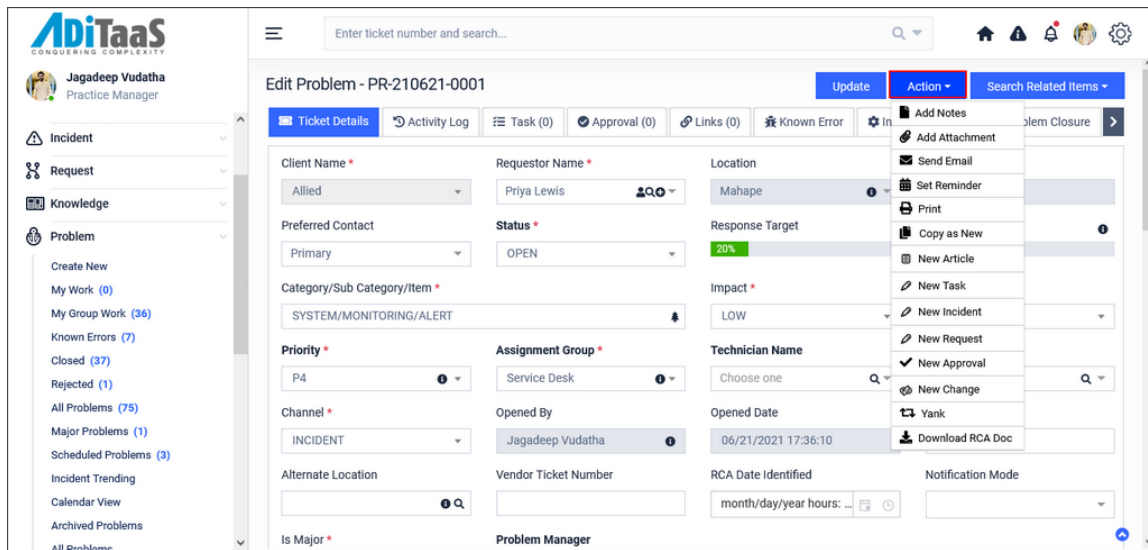
Restored records will be removed from Archived report and available on Active list.

**All Problems**- Displays all list of Problems records.

### EDIT/ UPDATE PROBLEM

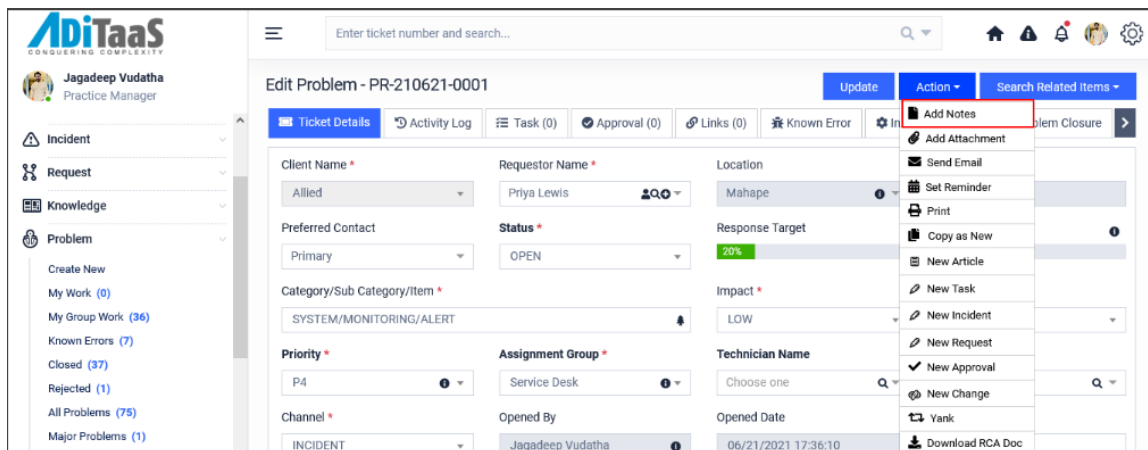
On successful creation of ticket, system will generate unique ticket id. Ticket id starts with date and number. **PR** indicates Problem ticket.

Agent can perform more actions on edit Problem screen, where agent can modify the information in the screen and click on Update button to save the changes.



### ADD NOTES

1. To add any additional information or work logs to ticket, click on **Action** → **Add Notes**.
2. Add Notes dialog box will open,



3. Click on checkbox to select required action items available on notes window
  - i. **Internal Notes:** Notes will be visible only agents. By default added notes will be visible for both agents and end users.
  - ii. **Email this note to technician:** Email notification will be sent to assigned technician with added notes.
  - iii. **Email this note to support group:** Email notification will be sent to all members of ticket assigned group with notes.
  - iv. **Email this note to requestor:** Email notification will be sent to requestor with added notes.
  - v. **Watch list:** This functionality enables technician to add any email id (internal/external) to keep posted with ticket updates. Once email id is added to watch list, all noticeable members will receive notification on any status change, on notes added and on resolution of the ticket.
4. Enter the required comments/images/screenshots in the Notes section and click on **Add Notes**.

### Add Notes ✕

Internal Notes  
 Email this note to Support Group

Email this note to Requestor  
 Email this note to Technician

Watch List Email Id

▼

Notes \*

Paragraph
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Add Notes

Cancel

### ADD ATTACHMENT:

1. To add an attachment to a ticket, click on **Action → Add Attachment**.
2. On clicking will open up a new window.
3. From the file chooser window, choose the file to be attached or directly drag and drop the attachment to add.
4. Click open to upload the attachment.

The screenshot shows the 'Edit Problem - PR-210621-0001' interface. The 'Action' dropdown menu is open, and 'Add Attachment' is highlighted with a red box. The main form displays the following details:

- Client Name:** Allied
- Requestor Name:** Priya Lewis
- Location:** Mahape
- Preferred Contact:** Primary
- Status:** OPEN
- Response Target:** 20%
- Category/Sub Category/Item:** SYSTEM/MONITORING/ALERT
- Impact:** LOW
- Priority:** P4
- Assignment Group:** Service Desk
- Technician Name:** Choose one
- Channel:** INCIDENT
- Opened By:** Jagadeep Vudatha
- Opened Date:** 06/21/2021 17:36:10



**Add Attachment**
✕

No file selected.

Or Drag It Here.

	File Name	Attached By	Attached On
<input type="checkbox"/>	New Text Document.txt	Jagadeep Vudatha	06/21/2021 18:01:37

All Uploaded attachments will be visible Under ‘View Attachment’ tab.

Edit Problem - PR-210621-0001
Update
Action
Search Related Items
View Attachment(s)

Ticket Details
Activity Log
Task (0)
Approval (0)
Links (0)
Known Error
Impacted CI (0)
Prob
New Text Document.txt ✕

Client Name \*  
Allied

Requestor Name \*  
Priya Lewis

Location  
Mahape

Contact No.  
0802545432

### Delete/ Remove Attachment:

To remove an attachment, click on respective attached attachment from the “Add Attachment” window and click on ‘Delete Attachment’.

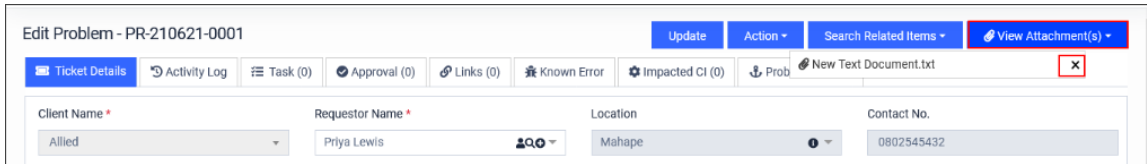
**Add Attachment**
✕

No file selected.

Or Drag It Here.

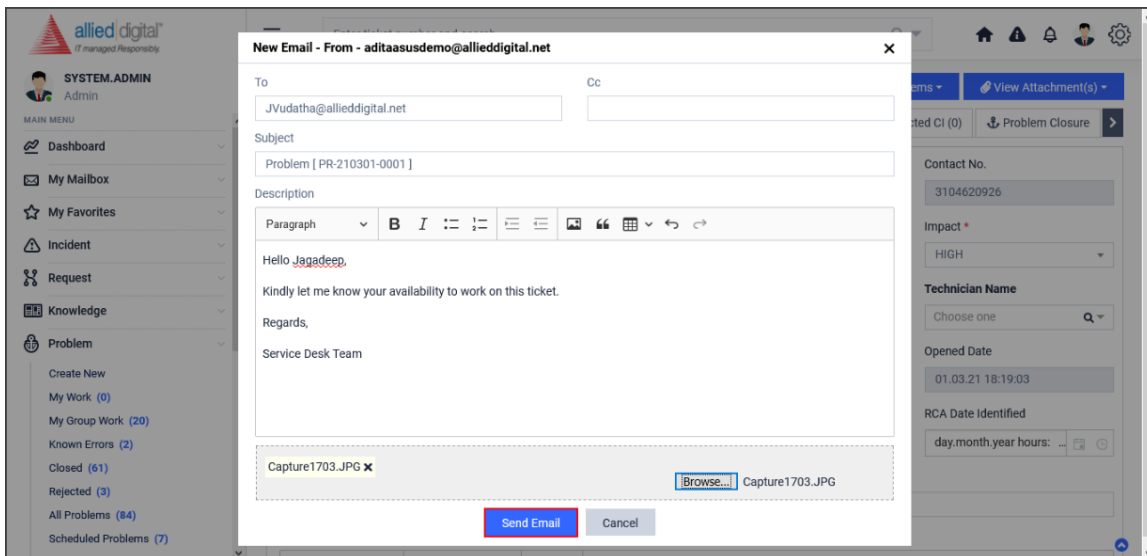
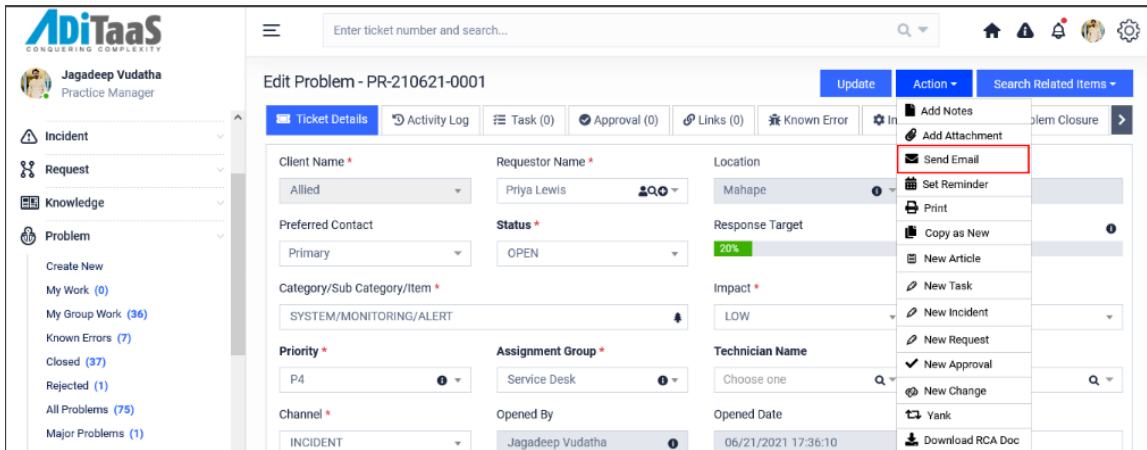
	File Name	Attached By	Attached On
<input checked="" type="checkbox"/>	New Text Document.txt	Jagadeep Vudatha	06/21/2021 18:01:37

To quick delete an attachment , click on **'View Attachment'** tab and go to respective attachment click on **'x'** placed next to it.



**SEND MAIL:**

1. To send an email from ticket, click on **Action → Send Email**.
2. New email template will be displayed, user email id and ticket id will be auto populated in **'To'** and **'Subject'** fields respectively. Attach any files by clicking the choose files.



3. When complete, click on **'Send Email'**. All actions are captured in Activity Log.

## SET REMINDER

Set reminder functionality allows agents to set a reminder to alert on some important tasks/events like contacting end user at specific given time or follow up on any task. It allow to put a date/time and option to select whom you want to remind.

1. To a set reminder, click on **Action → Set Reminder**.
2. Set reminder dialog box is displayed. Enter the **Subject** and **Comments** in box.
3. Select checkbox, if required to send an email notification regarding the notification.
4. In select applicable option from ‘**To Whom**’ drop down list.
  - d. **Remind me** – Reminder will be set for logged in agent.
  - e. **Support Group Members**- Reminder will be set for selected support group.
  - f. **Some else** – Provides option to set a reminder to specific person.
5. **Remind Time** –Select date/time to set a reminder.

The screenshot shows the ADiTaaS interface with the 'Set Reminder' dialog box open. The dialog box has the following fields and options:

- Subject \***: A text input field.
- Comments \***: A larger text area for notes.
- Send Email**: A checkbox to enable email notifications.
- To Whom \***: A dropdown menu with 'Remind Me' selected.
- Remind Time\***: A date and time picker showing '06/21/2021 18:07:40'.
- Buttons**: 'Submit' and 'Cancel' buttons at the bottom.

## SHOW REMINDERS

All scheduled reminders will be visible under **Action → Show Reminders** as well as on **Calendar view**.

Edit Problem - PR-210621-0001

Update Action Search Related Items View Attachment(s)

Ticket Details Activity Log Task (0) Approval (0) Links (0) Known Error Impacted CI (0)

Client Name \* Requestor Name \* Location Contact No.  
Allied Priya Lewis Mahape 0802545432

Preferred Contact Status \* Response Target Resolution Target  
Primary OPEN 53% 5

Category/Sub Category/Item \* Impact \* Urgency \*

Add Notes  
Add Attachment  
Send Email  
Set Reminder  
Show Reminders  
Print  
Copy as New  
New Article

Show Reminders

<input type="checkbox"/>	Notes	Subject	Scheduled Date & Time	Follow Up Type	Set By
<input type="checkbox"/>	Contact user at 7 pm	Contact user at 7 pm	06/21/2021 19:00:00	Remind Me	Jagadeep Vudatha

1 - 1 of 1 items

Deactivate Reminder Cancel

ADiTaaS CONQUERING COMPLEXITY

Jagadeep Vudatha Practice Manager

Incident Request Knowledge Problem

Create New My Work (0) My Group Work (36) Known Errors (7) Closed (37) Rejected (1) All Problems (75) Major Problems (1) Scheduled Problems (3) Incident Trending Calendar View Archived Problems All Problems

Change Release Task

Enter ticket number and search...

Calendar View

Reminder Scheduled

Month Week Day List

June 2021

SUN	MON	TUE	WED	THU	FRI	SAT
30	31	1	2	3	4 8:30a PR-210525-0001	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21 7p PR-210621-0001	22	23	24	25	26
27	28	29	30	1	2	3

## Deactivate the Reminder

Scheduled reminder can be deactivated with simple following steps.

1. Go to **Action**→**Show Reminders**
2. Select reminder and click on **Deactivate Reminder**
3. Reminder Status will be marked as deactivated.

Show Reminders					
<input type="checkbox"/>	Notes	Subject	Scheduled Date & Time	Follow Up Type	Set By
<input type="checkbox"/>	Contact user at 7 pm	Contact user at 7 pm	06/21/2021 19:00:00	Remind Me	Jagadeep Vudatha

1 - 1 of 1 items

Deactivate Reminder Cancel

### COPY AS NEW

'Copy As New' feature will copies the details of an existing problem record to a new problem record. Instead of re-entering all the information for new user

1. Click on **Action** → **Copy as New**
2. Copy As New dialog box will open to enter the **Requestor Name**

Edit Problem - PR-210621-0001

Update Action Search Related Items View Attachment(s)

Ticket Details Activity Log Task (0) Approval (0) Links (0) Known Error Impacted CI (0)

Client Name \* Allied Requestor Name \* Priya Lewis Location Mahape

Preferred Contact Primary Status \* OPEN Response Target 53% Contact No. 0802545432

Category/Sub Category/Item \* Impact \* Resolution Target

Add Notes Add Attachment Send Email Set Reminder Show Reminders Print Copy as New New Article Urgency \*

**Copy As New**

Requestor Name \*

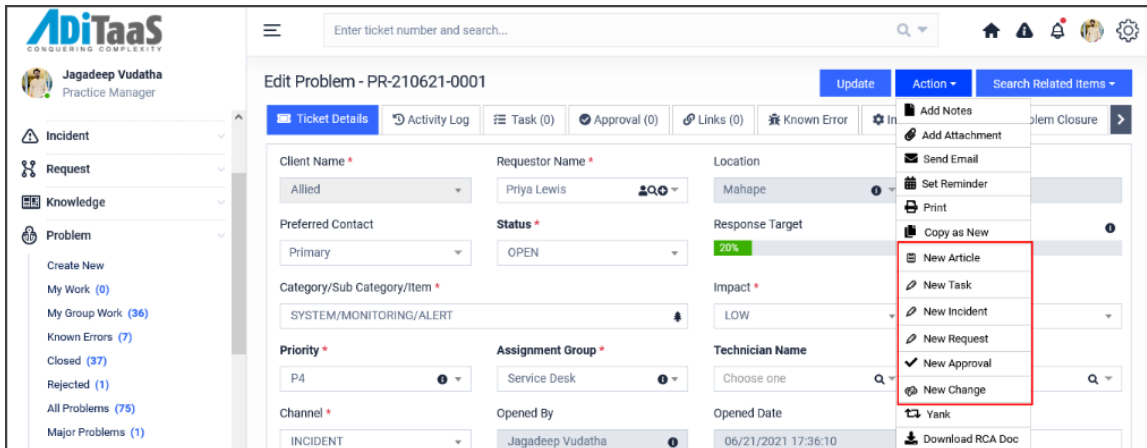
Choose one

Create Cancel

3. Search and select required **Requestor Name** and Click **Create**.

### QUICK LINKS TO CREATE TICKETS

Following links helps to create other module ticket from Problem ticket.



## NEW ARTICLE

Allows to raise an article from Problem ticket.

1. Go to **Action** → **New Article**
2. Enter the new article details and click on submit
3. New created article will be linked to Problem ticket.

Create Knowledge Article
Add Attachment
Submit
✕

**Client Name \***

**Status \***

**Category/Sub Category/Item \***

**Problem Title \***

**Problem Description \***

Paragraph

**B I**

**Assignment Group \***

**Technician Name**

**Source \***

**Type \***

**Available For \***

**Configuration Item**

**Tags**

**Additional Link**

**Opened By**

**Opened Date**

**Article Image**

No file selected.

Or Drag It Here.

**Solution \***

Paragraph

**B I**

## NEW TASK

Allows to raise a new task ticket from Problem ticket.

1. Go to **Action** → **New Task**
2. Enter the new task details and click on submit
3. New created task ticket will be linked to Problem ticket.

### Create Task

Add Attachment
Submit

<b>Client Name *</b> Allied	<b>Requestor Name *</b> Priya Lewis	<b>Task Name *</b> 	<b>Linked To</b> PR-210621-0001
<b>Status *</b> OPEN	<b>Assignment Group *</b> Choose one	<b>Technician Name</b> Choose one	<b>Opened By</b> Jagadeep Vudatha
<b>Opened Date</b> 06/21/2021 18:24:28	<b>Due Date</b> month/day/year hours: minu...	<b>Sequence *</b> 1	

**Task Description \***  
Exchange Server Down

**Additional Comments \***

Paragraph

Exchange Server Down

Submit
Cancel

## NEW CHANGE

Allows to raise a new change ticket from Problem ticket.

1. Go to **Action** → **New Change**
2. Enter the new change details and click on submit
3. New created change ticket will be linked to Problem ticket.

### Create Change

Add Attachment
Submit

<b>Client Name *</b> Allied	<b>Change Initiator *</b> Priya Lewis	<b>Location *</b> Mahape	<b>Status *</b> OPEN
<b>Category/Sub Category/Item *</b> 		<b>Impact *</b> LOW	<b>Risk *</b> LOW
<b>Priority *</b> P4	<b>Change Type *</b> Choose one	<b>Assignment Group *</b> Choose one	<b>Change Owner</b> Choose one
<b>Primary CI</b> Choose one	<b>Opened By</b> Jagadeep Vudatha	<b>Opened Date</b> 06/21/2021 18:27:06	

**Short Description \***  
Exchange Server Down

**Change Description \***

Paragraph

Submit
Cancel

## NEW INCIDENT

Allows to raise a new incident ticket from Problem ticket.

1. Go to **Action** → **New Incident**



2. Enter the new incident details and click on submit
3. New created incident ticket will be linked to Problem ticket.

**Create New Incident**

Add Attachment
Submit
✕

<b>Client Name *</b>	<b>Requestor Name *</b>	<b>Location</b>	<b>Contact No.</b>
<input type="text" value="Allied"/>	<input type="text" value="Jagadeep Vudatha"/> <span style="font-size: 10px;">👤🔍📌</span>	<input type="text" value="Mahape"/>	<input type="text" value="13104620926"/>
<b>Category/Sub Category/Item *</b>	<b>Status *</b>	<b>Preferred Contact</b>	
<input type="text"/>	<input type="text" value="OPEN"/>	<input type="text" value="Primary"/>	
<b>Notification Mode</b>	<b>Impact *</b>	<b>Urgency *</b>	<b>Priority *</b>
<input type="text"/>	<input type="text" value="LOW"/>	<input type="text" value="LOW"/>	<input type="text" value="P4"/>
<b>Channel *</b>	<b>Assignment Group *</b>	<b>Technician Name</b>	<b>Configuration Item</b>
<input type="text" value="PHONE"/>	<input type="text" value="Choose one"/>	<input type="text" value="Choose one"/>	<input type="text" value="Choose one"/>
<b>Alternate Contact *</b>	<b>Alternate Location</b>		
<input type="text"/>	<input type="text" value=""/>		
<b>Flags</b>			
<input type="text" value="Choose one"/>			

Submit
Cancel

## NEW APPROVAL

Allows to raise an approval ticket from Problem ticket.

1. Go to **Action** → **New Approval**
2. Enter the new approval ticket details and click on submit
3. New created approval ticket will be linked to Problem ticket.

**Create Approval**

Add Attachment
Submit
✕

<b>Approval For</b>	<b>Status *</b>	<b>Approval Group *</b>	<b>Approver</b>
<input type="text" value="PR-210610-0007"/>	<input type="text" value="OPEN"/>	<input type="text" value="Choose one"/>	<input type="text" value="Choose one"/>
<b>Submitted Date</b>	<b>Sequence Of *</b>		
<input type="text" value="06/24/2021 10:31:52"/>	<input type="text" value="1"/>		
<b>Comments *</b>			
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; align-items: center; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> <span style="font-size: 10px; margin-right: 5px;">Paragraph</span> <span style="font-size: 10px; margin-right: 5px;">B</span> <span style="font-size: 10px; margin-right: 5px;">I</span> <span style="font-size: 10px; margin-right: 5px;">🔗</span> <span style="font-size: 10px; margin-right: 5px;">☰</span> <span style="font-size: 10px; margin-right: 5px;">☰</span> <span style="font-size: 10px; margin-right: 5px;">🖼️</span> <span style="font-size: 10px; margin-right: 5px;">🗨️</span> <span style="font-size: 10px; margin-right: 5px;">📅</span> <span style="font-size: 10px; margin-right: 5px;">🎥</span> <span style="font-size: 10px; margin-right: 5px;">↶</span> <span style="font-size: 10px; margin-right: 5px;">↷</span> </div> <div style="height: 40px; border: 1px solid #ccc;"></div> </div>			

Submit
Cancel

## PROBLEM ACTIVITY LOG

**Activity log** captures all actions performed on ticket from problem creation to closure with date/time stamp along with agent id. All modification performed on ticket is auto captured. Activity Log helps to determine the order. From the creation of ticket to resolution all activities are captured with order. All

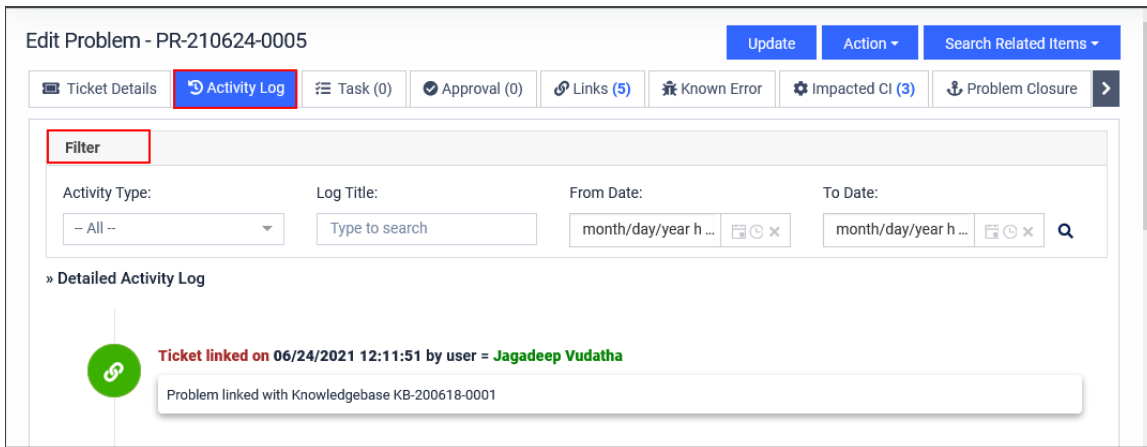
activities like add notes, add attachment, setting a reminder, creating task, creating approvals, linking tickets, linking CI's all activities are capture in activity log with sequence

**Filter** option at the top provides a facility to search for specific activity log or activity log of record for specific duration.

**Activity Type** displays list activities in drop down list. On selecting specific activity type activity log displays logs accordingly.

**Log Title** allows to enter relevant keyword in given text field, depend on keyword displays the activity log

**From** and **To date** allows to find activity log for specific duration

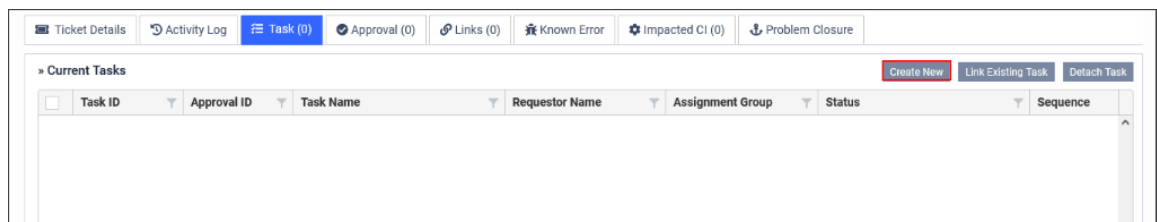


**Note:** Logs in the tool protected from alteration after-the-fact.

## TASK

Agent can create a new Task or open any existing tasks and link to Problem. Problem ticket cannot be closed until all linked tasks are closed.

**Create New-** Click on **Task** → **Create New** to create a new Task.



**Create Task**

Add Attachment
Submit

<b>Client Name *</b> <input type="text" value="Allied"/>	<b>Requestor Name *</b> <input type="text" value="Jagadeep Vudatha"/>	<b>Task Name *</b> <input type="text"/>	<b>Linked To</b> <input type="text" value="PR-210625-0001"/>
<b>Status *</b> <input type="text" value="OPEN"/>	<b>Assignment Group *</b> <input type="text" value="Choose one"/>	<b>Technician Name</b> <input type="text" value="Choose one"/>	<b>Opened By</b> <input type="text" value="Jagadeep Vudatha"/>
<b>Opened Date</b> <input type="text" value="06/26/2021 05:30:27"/>	<b>Due Date</b> <input type="text" value="month/day/year hours: minu..."/>	<b>Sequence *</b> <input type="text" value="1"/>	

**Task Description \***

**Additional Comments \***

Paragraph B I 🔗 ☰ ☰ 🖼️ 🗨️ 📄 📺 ↶ ↷

Submit
Cancel

**Link Existing Task-** To link existing Tasks, click on **Task** → **Link Existing Task**  
Displays list of existing Tasks. Agent can link one or more tasks to Problem by clicking on Link button after selecting the task checkbox.

Ticket Details
Activity Log
Task (0)
Approval (0)
Links (0)
Known Error
Impacted CI (0)
Problem Closure

» **Current Tasks** 
Create New
Link Existing Task
Detach Task

<input type="checkbox"/>	Task ID	Approval ID	Task Name	Requestor Name	Assignment Group	Status	Sequence

**Link To**
Search
✕

<input type="checkbox"/>	ID	Title	Requestor Name	Assignment Group	Technician Name	Status	Sequence	Opened Date	Cl
<input type="checkbox"/>	T-210625-0010	Check Network Status	Jagadeep Vudatha	Network Support		OPEN	2	06/25/2021 12:39:32	Je ^
<input type="checkbox"/>	T-210625-0009	Check Application Status	Jagadeep Vudatha	Service Desk		OPEN	1	06/25/2021 12:39:32	Je
<input type="checkbox"/>	T-210625-0008	Check database status	Jagadeep Vudatha	Server Support		OPEN	1	06/25/2021 12:39:32	Je
<input type="checkbox"/>	T-210624-0033	Check Network Status	Jignesh Sodvadiya	Network Support		OPEN	2	06/24/2021 20:43:26	S'
<input type="checkbox"/>	T-210624-0032	Check Application Status	Jignesh Sodvadiya	Service Desk		OPEN	1	06/24/2021 20:43:26	S'
<input type="checkbox"/>	T-210624-0031	Check database status	Jignesh Sodvadiya	Server Support		OPEN	1	06/24/2021 20:43:26	S'
<input type="checkbox"/>	T-210624-0024	Check Network Status	Jignesh Sodvadiya	Network Support		OPEN	2	06/24/2021 19:49:26	S'
<input type="checkbox"/>	T-210624-0023	Check Application Status	Jignesh Sodvadiya	Service Desk		OPEN	1	06/24/2021 19:49:26	S'
<input type="checkbox"/>	T-210624-0022	Check database status	Jignesh Sodvadiya	Server Support		OPEN	1	06/24/2021 19:49:26	S'
<input type="checkbox"/>	T-210624-0021	Check Network Status	Jignesh Sodvadiya	Network Support		OPEN	2	06/24/2021 19:34:18	S' v

<
1 2 3 4 5 ...
>
1 - 10 of 54 items

Link
Cancel

**Detach Task-** Select respective Task and click on **'Detach Task'** to unlink it.

Edit Problem - PR-210625-0001

Update Action Search Related Items

Ticket Details Activity Log Task (1) Approval (0) Links (0) Known Error Impacted CI (0) Problem Closure

Current Tasks Create New Link Existing Task Detach Task

Task ID	Approval ID	Task Name	Requestor Name	Assignment Group	Status	Sequence
<input checked="" type="checkbox"/> E210625-0010		Check Network Status	Jagadeep Vudatha	Network Support	OPEN	2

## LINKS

This tab allows agents to create relationships by linking Problem to other tickets in system.

Options Available:

**Problem to Problem:** Problem can be linked to other Problem Ticket

1. Navigate to **Problem** module
2. Open a relevant problem ticket in edit mode
3. Move to **Links** tab and select Relation Type as '**Problem to Problem**'

Edit Problem - PR-210624-0005

Update Action Search Related Items

Ticket Details Activity Log Task (0) Approval (0) Links (0) Known Error Impacted CI (3) Problem Closure

Links Relation Type: Choose one

ID	Status	Relation Type	As

- Problem to Problem
- Problem to Incident
- Problem to Request
- Problem to Change
- Problem to Knowledgebase


Link To

Search

ID	Title	Status	Assignment Group	Category
<input type="checkbox"/> PR-210624-0003	Application Slowness Issue	KNOWN ERROR	Service Desk	SOFTWARE
<input type="checkbox"/> PR-210624-0002	Exchange Server Down	RESOLVED	Service Desk	SYSTEM
<input type="checkbox"/> PR-200825-0001	Intermittent Network Issue	PROGRESSING	Service Desk	HARDWARE
<input type="checkbox"/> PR-200709-0004	Unable to connect mail server	OPEN	Service Desk	IT SERVICES
<input type="checkbox"/> PR-200709-0003	Unable to connect mail server	OPEN	Service Desk	IT SERVICES
<input type="checkbox"/> PR-200511-0008	Intermittent network connection	OPEN	Service Desk	HARDWARE

1 - 6 of 6 items

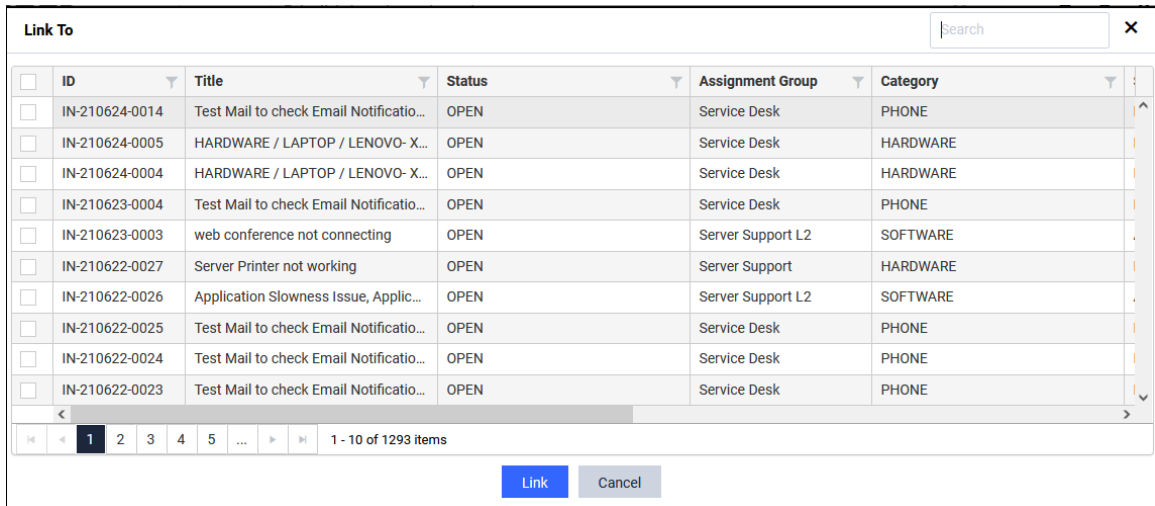
Link Cancel


4. Click on  icon, which will display all open problems in a pop-up box. Agent can select problems and attach to problem.
5. Click on Link

6. Linked ticket will be visible on Links tab.

**Problem to Incident:** Problem can be linked to Incident ticket

1. Navigate to **Problem** module
2. Open a relevant problem ticket in edit mode
3. Move to **Links** tab and select Relation Type as **'Problem to Incident'**



4. Click on  icon, which will display all open incidents in a pop-up box. Agent can select incidents and attach to problem.
5. Click on Link
6. Linked ticket will be visible on Links tab.

**Problem to Request:** Problem can be linked to Request ticket

1. Navigate to **Problem** module
2. Open a relevant problem ticket in edit mode
3. Move to **Links** tab and select Relation Type as **'Problem to Request'**



Edit Problem - PR-210624-0005

Update Action Search Related Items

Ticket Details Activity Log Task (0) Approval (0) **Links (0)** Known Error Impacted CI (3) Problem Closure

» Links Relation Type: Choose one

ID	Status	Relation Type	As

Problem to Problem  
Problem to Incident  
Problem to Request  
Problem to Change  
Problem to Knowledgebase


Link To

Search

ID	Title	Status	Assignment Group	Category
KB-210614-0001	Unable to Sign PDF	LIVE	Service Desk	SYSTEM
KB-200618-0001	Problem title Asrsh	LIVE	Application Support	IT SERVICES
KB-200617-0001	PROBLEM TITLE	LIVE	Application Support	IT SERVICES
KB-200616-0010	How to stop the client from installing	LIVE	Service Desk	SOFTWARE
KB-200616-0001	Printer/Scanning - HP Printer/Scan...	LIVE	Service Desk	HARDWARE

1 - 5 of 5 items

Link Cancel

4. Click on  icon, which will display all articles in a pop-up box. Agent can select article and attach to problem.
5. Click on Link
6. Linked article will be visible on Links tab.

### Problem to Change- Problem can be linked to Change ticket

1. Navigate to **Problem** module
2. Open a relevant problem ticket in edit mode
3. Move to **Links** tab and select Relation Type as '**Problem to Change**'

Edit Problem - PR-210624-0005

Update Action Search Related Items

Ticket Details Activity Log Task (0) Approval (0) **Links (0)** Known Error Impacted CI (3) Problem Closure

» Links Relation Type: Choose one

ID	Status	Relation Type	As

Problem to Problem  
Problem to Incident  
Problem to Request  
Problem to Change  
Problem to Knowledgebase

ID	Title	Status	Assignment Group	Category
CR-210624-0003	RAM Upgrade	OPEN	Service Desk	Software
CR-210624-0002	jagadeep.vudatha@gmail.com	OPEN	Service Desk	Software

4. Click on icon, which will display all open changes in a pop-up box. Agent can select changes and attach to problem.
5. Click on Link
6. Linked ticket will be visible on Links tab.

**Detach Ticket:** The agent can detach a linked incident or any other ticket by selecting a ticket and clicking on the Delete button.

## APPROVALS

### Create New

If a ticket requires formal approval before proceeding the case, Agent can create an approval manually by clicking on **Approval** → **Create New**.

Enter all \* marked mandatory fields.



Edit Problem - PR-210624-0005 Action ▾

Ticket Details Activity Log Task (0) Approval (1) Links (0) Known Error Impacted CI (3) Problem Closure

» Approval Create New Detach Approval

<input type="checkbox"/>	Approval ID	Status	Comments	Sequence Of	Approval
<input type="checkbox"/>	<a href="#">AP-210624-0001</a>	OPEN	Kindly provide your approval.	1	Regional

---

Edit Approval - AP-210624-0001 Add Attachment ✕

Approval For: PR-210624-0005     
 Status: OPEN     
 Approval Group: Regional Approval Group     
 Approver: Jagadeep Vudatha

Submitted Date: 06/24/2021 15:58:23     
 Sequence Of: 1

Approver Comments \*

Paragraph

Comments \*

Paragraph

Approve
Reject
Update
Cancel

On submitting a request for approval, approver will receive an approval mail with a link to approve or reject the request.

All linked approvals will visible under Approval Tab. If the logged in user is a managerial user, then he can open the approval and click on **Approve** or **Reject**.

### Detach Approval

To detach any approval, click on 'Detach Approval'.

Edit Problem - PR-210624-0005 Action ▾

Ticket Details Activity Log Task (0) Approval (1) Links (0) Known Error Impacted CI (3) Problem Closure

» Approval Create New Detach Approval

<input checked="" type="checkbox"/>	Approval ID	Status	Comments	Sequence Of	Approval
<input checked="" type="checkbox"/>	<a href="#">AP-210624-0001</a>	OPEN	Kindly provide your approval.	1	Regional

Do you want to detach the selected linked Approvals?

Yes

No

**Reason For Detach**
✕

Paragraph ▼
**B**
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Submit
Cancel

### KNOWN ERROR

A Known Error is a problem that has a documented root cause and a workaround. Problem ticket has a separate status called 'Known Error'. Upon changing status to Known Error, there is a provision to capture details regarding the Known Error.

Fill following details in Known Error Tab,

1. Select Symptom Code
2. Mention whether it has tested earlier or not by selecting Yes or No
3. Enter the Source like referring external KB, previously carried out or from other sources
4. Select workaround found date under Date Identified
5. Enter detailed explanation or information in Workaround field
6. Click on Update

There is a separate link provided to access Known Error records.

ID	Title	Description	Requestor Name	Status	Assignment Group
PR-210524-0005	jagadeep.vudatha@gmail...	jagadeep.vudatha@gmail.c...	Jagadeep Vudatha	KNOWN ERROR	Service Desk
PR-210624-0003	Application Slowness Is...	Application Slowness Issue	Jagadeep Vudatha	KNOWN ERROR	Service Desk
PR-210521-0002	RAM Upgrade	RAM Upgrade	Priya Lewis	KNOWN ERROR	Service Desk
PR-210511-0001	Intermittent Network Iss...	Intermittent Network Issue	Priya Lewis	KNOWN ERROR	Service Desk
PR-210505-0001	Intermittent Network Iss...	Intermittent Network Issue	Priya Lewis	KNOWN ERROR	Service Desk
PR-201120-0001	Exchange Server Down	Symp	Jagadeep Vudatha	KNOWN ERROR	Service Desk
PR-201112-0003	RAM Upgrade	RAM Upgrade	Jagadeep Vudatha	KNOWN ERROR	Service Desk
PR-200728-0008	Scanner is not getting c...	Scanner is not getting conn...	Priya Lewis	KNOWN ERROR	Service Desk

Tool facilitate the opening of a Problem Record with Known Error status and before submitting the Problem record it's mandatory to fill the Known Error details.

**Create Problem**

Client Name: Allied | Requestor Name: Choose one | Location: Choose one | Contact No.: [Empty]

Preferred Contact: Primary | **Status: KNOWN ERROR** | Category/Sub Category/Item: [Empty]

Impact: LOW | Urgency: LOW | Priority: Choose one | Assignment Group: Choose one

Technician Name: Choose one | Configuration Item: Choose one | Channel: Choose one | Opened By: Jagadeep Vudatha

Opened Date: 06/18/2021 17:24:57 | Alternate Contact: [Empty] | Alternate Location: [Empty] | Vendor Ticket Number: [Empty]

RCA Date Identified: month/day/year hours: [Empty] | Notification Mode: [Empty] | Is Major: No | Problem Manager: Choose one

**Known Error Details**

Symptom Code\*: Choose one | Tested\*: Choose one | Source\*: Choose one | Date Identified: month/day/year hours: minu... [Empty]

*Please enter symptom code* | *Please enter tested value* | *Please select the source*

Workaround\*: [Empty text area]

*Please enter workaround*

Buttons: Submit, Cancel

**Known Error Details**

Symptom Code\*: ACCESS ISSUE | Tested\*: Yes | Source\*: PREVIOUSLY CARRIED OUT | Date Identified: 18-May-21 03:00 PM

Workaround\*: There is a access issue. Issue can be solved by providing local administrative access

Buttons: Submit, Cancel

Known error details are captured in Activity log.

**Problem created on 05/21/2021 16:54:27 by user = ITSM Agent**

Client:- Allied  
 Requestor Name:- Priya Lewis  
 Category / Subcategory / Item:- Software/Application/Slowness Issue  
 Status:- KNOWN ERROR  
 Priority:- P4  
 Impact:- LOW  
 Assignment Group:- Service Desk  
 Urgency:- LOW  
 Problem Description:- Unable to access application  
 Symptoms:-  
 Unable to access application

**Symptom Code:- ACCESS ISSUE**  
 Tested:- Yes  
 Source:- PREVIOUSLY CARRIED OUT  
 Date Identified:- 05/18/2021 15:00:00  
 Workaround:-  
 There is a access issue. Issue can be solved by providing local administrative access.

Impact Details:- Multiple users facing same issue

## IMPACTED CI

Related configuration items can be added under 'Impacted CI' tab.

Edit Problem - PR-210511-0001

Ticket Details | Activity Log | Task (0) | Approval (0) | Links (0) | Known Error | **Impacted CI (0)** | Problem Closure

» Impacted CI

ID	CI Name	Type	Serial No.	Model No.	Vendor Name
Add New   Link Existing CI   Detach CI					

**Add New**- Allows to create a new CI and link to Problem.

Create New CI

Client Name \* Allied | Requestor Name \* Jagadeep Vudatha | Location \* Mahape | Contact No. 13104620926

CI Name \* | CI Type \* Choose one | Status \* OPEN

Assignment Group \* Choose one | Technician Name Choose one | Alternate Location Choose one | Alternate Contact

Short Description

Additional Comments

**Link Existing CI-** On clicking link existing CI, displays all available CI and agent can select related CI and link to Problem.

Edit Problem - PR-210511-0001

Update    Action    Search Related Items

Ticket Details    Activity Log    Task (0)    Approval (0)    Links (0)    Known Error    **Impacted CI (0)**    Problem Closure

» Impacted CI

Add New    **Link Existing CI**    Detach CI

ID	CI Name	Type	Serial No.	Model No.	Vendor Name
----	---------	------	------------	-----------	-------------

**Link To**

CI Type \*    Search Text

Desktop    Search    Search

ID	Name	Type	Vendor Name	Serial Number	Model No.	Client	Created By	Created On	Last
CI-200415-0001	CI Testing by Arsad	Desktop				Allied	Jagadeep Vudatha	04/16/2020 09:23:29	Jag:
CI-200303-0001	test	Desktop				Allied	Deepak4 Shukla	03/04/2020 01:50:46	Dee:
CI-200305-0002	test	Desktop				Allied	Deepak4 Shukla	03/05/2020 22:51:21	Dee:
CI-200323-0002	test by sagar 2	Desktop				Allied	Jagadeep Vudatha	03/23/2020 11:35:34	Jag:
CI-200317-0002	TEST #1211	Desktop				Allied	Jagadeep Vudatha	03/20/2020 12:02:23	Jag:
CI-200323-0003	test by sagar 4	Desktop				Allied	Jagadeep Vudatha	03/23/2020 13:16:13	Jag:
CI-200324-0002	TEST #5645	Desktop				Allied	Jagadeep Vudatha	03/24/2020 23:58:42	Jag:
CI-200323-0004	test by sagar 2	Desktop				Allied	Jagadeep Vudatha	03/23/2020 13:19:42	Jag:
CI-200323-0005	test by sagar 5	Desktop				Allied	Jagadeep Vudatha	03/23/2020 13:35:31	Jag:
CI-200323-0006	test test	Desktop				Allied	Jagadeep Vudatha	03/23/2020 13:37:19	Jag:

1 - 20 of 26 items

Link    Cancel

**Detach CI-** Linked CI can be detached by clicking on 'Detach CI'.

Ticket Details    Activity Log    Task (0)    Approval (0)    Links (0)    Known Error    **Impacted CI (3)**    Problem Closure

» Impacted CI

Add New    Link Existing CI    **Detach CI**

ID	CI Name	Type	Serial No.	Model No.
<input checked="" type="checkbox"/>	<a href="#">CI-210606-0001</a>	Canon Pixma G3000	Network Printer	S767676
<input type="checkbox"/>	<a href="#">CI-210610-0001</a>	Desktop CI		DELL12345
<input type="checkbox"/>	<a href="#">CI-210610-0002</a>	DDCP-CHFD4	Desktop	A92928

**Do you want to delete the selected linked CI's?**

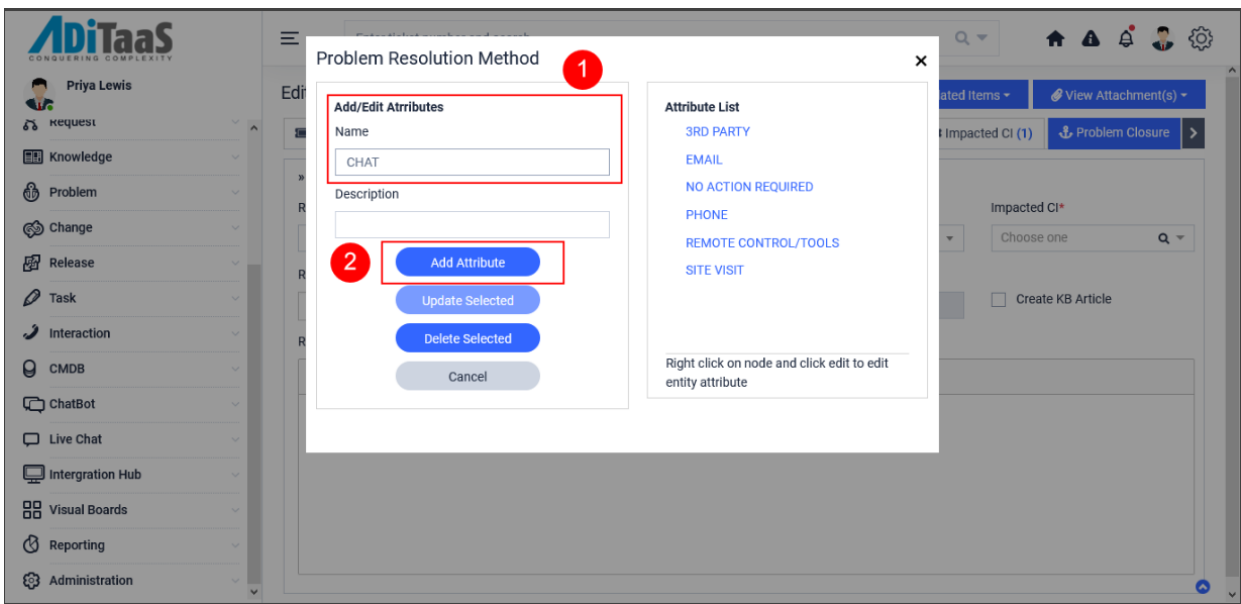
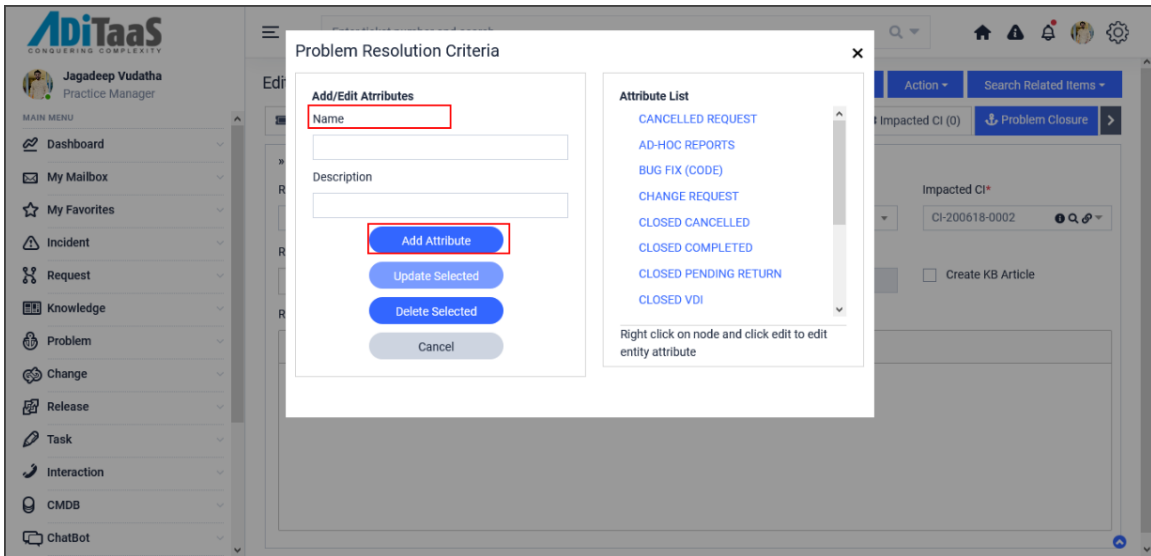
Yes    No

## PROBLEM CLOSURE

The Problem Closure tab fields will be enabled once **CLOSED** has been selected from the status dropdown. The agent need to specify **Resolution Method**, **Resolution Criteria** and **Caused By** from the dropdown. Enter **Resolution Date Identified**, **Resolution Recommendations** and click on **Update**

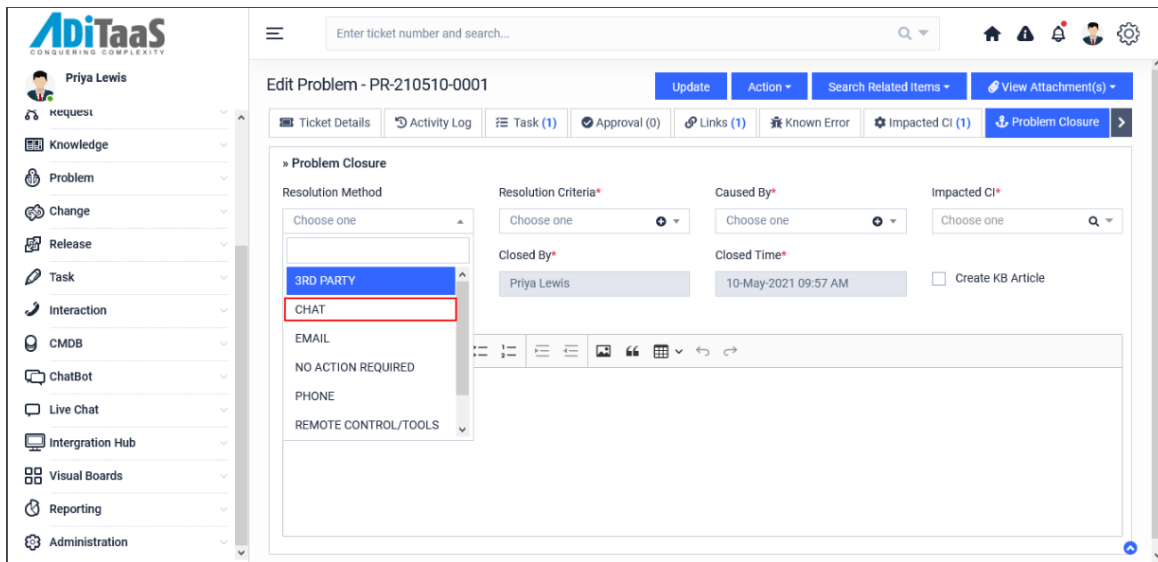
‘+’ symbol allows authorized user to add any missing / new closure category. Only authorized users will have access to add closure category

1. Click on ‘+’ symbol on specific text field
2. Enter the new closure category name
3. Click on Add Attribute



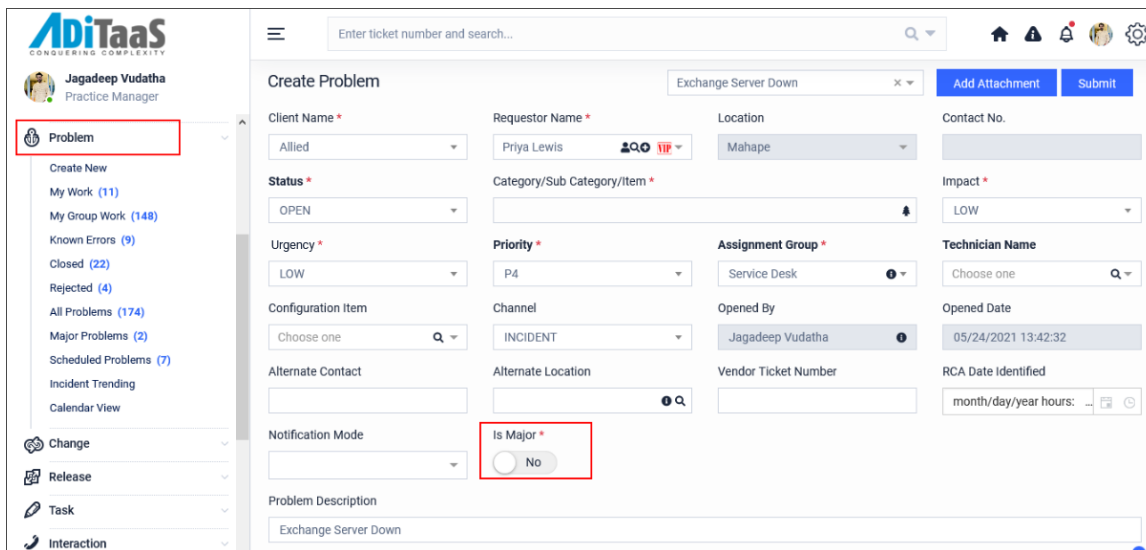
Added value will be displayed on the list on real time.





### MAJOR PROBLEMS/MAJOR PROBLEM REVIEW

Problem records can be marked as major problem by clicking on Is Major checkbox in create and edit problem screen.



**Create Problem**

Exchange Server Down

Client Name: Allied | Requestor Name: Priya Lewis | Location: Mahape

Status: OPEN | Category/Sub Category/Item: | Impact: LOW

Urgency: LOW | Priority: P4 | Assignment Group: Service Desk | Technician Name: Choose one

Configuration Item: Choose one | Channel: INCIDENT | Opened By: Jagadeep Vudatha | Opened Date: 05/24/2021 13:42:32

Alternate Contact: | Alternate Location: | Vendor Ticket Number: | RCA Date Identified: month/day/year hours: ...

Notification Mode: | **Is Major:**

Problem Description: Exchange Server Down

All major problems can be easily found under Major Problems.

**Major Problems**

ID	Title	Requestor Name	Status	Assignment Group	Category	Si
PR-210606-0002	Server is down	ITSM Agent	OPEN	Service Desk	Hardware	Sc
PR-210525-0001	Exchange Server Down	Deepak Shukla	PROGRESSING	Service Desk	Hardware	Sc
PR-201201-0001	Intermittent Network Iss...	Jagadeep Vudatha	OPEN	Service Desk	HARDWARE	RI
PR-201112-0002	Network Down at buildin...	Jagadeep Vudatha	KNOWN ERROR	Service Desk	IT SERVICES	SI

1 - 4 of 4 items

Once Major Problem is closed MPR (Major Problem Review) form will be enabled.

### Edit Problem - PR-210618-0005

Update Action Search Related Items

Ticket Details Activity Log Task (0) Approval (0) Links (5) Known Error Impacted CI (0) Problem Closure

Client Name * Allied	Requestor Name * Priya Lewis	Location Mahape	Contact No. 0802545432
Preferred Contact Primary	Status * CLOSED	Response Target 0%	Resolution Target 0%
Category/Sub Category/Item * SYSTEM/MONITORING/ALERT	Impact * LOW	Urgency * LOW	
Priority * P4	Assignment Group * Service Desk	Technician Name Choose one	Configuration Item Choose one
Channel * INCIDENT	Opened By Jagadeep Vudatha	Opened Date 06/18/2021 18:11:19	Alternate Contact
Alternate Location	Vendor Ticket Number	RCA Date Identified month/day/year hours:minutes:seconds	Notification Mode
Is Major * <input checked="" type="checkbox"/> Yes	Problem Manager Jagadeep Vudatha		

### Edit Problem - PR-210618-0005

Update Action Search Related Items

Ticket Details Activity Log Task (0) Approval (0) Links (5) Known Error Impacted CI (0) Problem Closure

» Problem Closure

Resolution Method 3RD PARTY	Resolution Criteria * BUG FIX (CODE)	Caused By * CLIENT APPLICATION	Impacted CI * CI-200618-0002
Resolution Date Identified * 06/18/2021 15:00:00	Closed By * Jagadeep Vudatha	Closed Time * 06/18/2021 18:12:35	<input type="checkbox"/> Create KB Article

Resolution Recommendations \*

Paragraph

**B I** [List Bulleted] [List Numbered] [List None] [Image] [Link] [Table] [Undo] [Redo]

Issue is resolved

☰

🔍

### Edit Problem - PR-210618-0005 Action ▾

📄 Ticket Details | 
 🕒 Activity Log | 
 📋 Task (0) | 
 👤 Approval (0) | 
 🔗 Links (5) | 
 🚩 Known Error | 
 ⚙️ Impacted CI (0) | 
 📄 Problem Closure | 
 MPR Form
Save MPR Form

#### Major Problem Review Form

MPR Date:  | Next MPR Date (If applicable):

**Problem / Incident References :**

**Problem References**

PR-210610-0006

**Incident References**

IN-210526-0003, IN-210524-0008, IN-210521-0002, IN-210520-0002

**Problem Status**

CLOSED

**Problem Description - Management Summary**

Exchange Server Down

**Attendees**

Jagadeep, Priya, Deepak, Jignesh

**Incident Details**

Exchange Server Down

**Lessons Learnt**

1. Monitoring and logging are invaluable for debugging production
2. Use application-specific credentials

**Problem Manager**

Jagadeep Vudatha

**Restoration Actions :**

Initial Problem Priority:  | Final Problem Priority:

**Timeline (GMT) - Key dates and times should be completed below :**

Detection:

Actual Start Date & Time:  | First Event/Alarm Date & Time:  | First Call Date & Time:

Incident Open Date & Time:  | Problem Open Date & Time:

**Escalation :**

First Resolver Owner:  | Final Resolver Owner:  | Priority 1 Escalation:

**Actions Taken :**

Diagnosis Date & Time:  | Restoration Date & Time:  | Recovery End Date & Time:

**Communication :**

User Customer Communication Date & Time:  | Management Communication Date & Time:

**Root Cause Analysis :**

**Trigger**

Server Down

**Root Cause**

High CPU

**Workaround/Known Error**

Monitoring Server

**Failure Avoidance**

Monitoring Server

**Issue Identification :**

Who first identified the issue?:  | How was the issue first identified?:

**Action Items/Opportunities for Improvements :**

Sr No	Item / Comments	Owner	Due Date	Status
<span style="border: 1px solid #007bff; padding: 2px;">+ ADD</span>				

Save MPR Form

Edit Problem - PR-210618-0005

Activity Log | Task (0) | Approval (0) | Links (5) | Known Error | Impacted CI (0) | Problem Closure | MPR Form

» Major Problem Review Form

MPR Date: 06/18/2021 | Next MPR Date (if applicable): 06/25/2021

Problem / Incident References :

Problem References: PR-210610-0006 | Incident References: IN-210526-0003, IN-210524-0008, IN-210521-0002, IN-210521-0002 | Problem Status: CLOSED

Attendees: Jagadeep, Priya, Deepak, Jignesh | Problem Manager: Jagadeep Vudatha | Incident Details: Exchange Server Down

Lessons Learnt

1. Keep your servers up to date
2. Use application-specific credentials
3. Monitoring and logging are invaluable for debugging production

Problem Description: Exchange Server Down

Action: Add Attachment, Send Email, Print, Copy as New, Yank, **Print MPR**, Download RCA Doc

Once Major Problem Review form is saved. Form can be View/ Print/Download under Action → Print MPR.

Print | Cancel

**Major Problem Review (MPR)**

MPR Date :	06/18/2021 00:00:00	Next MPR Date (if applicable) :	06/18/2021 00:00:00
Problem / Incident References :			
Problem References :	PR-210610-0006	Incident References :	IN-210526-0003, IN-210524-0008, IN-210521-0002, IN-210520-0002
Problem Status :	CLOSED	Attendees :	Jagadeep, Priya, Deepak, Jignesh
Problem Manager :	Jagadeep Vudatha	Incident Details :	Exchange Server Down
Lessons Learnt :			
1. Monitoring and logging are invaluable for debugging production 2. Use application-specific credentials			
Problem Description :			
Exchange Server Down			
Restoration Actions :			
Initial Problem Priority :	P1	Final Problem Priority :	P4
Timeline (GMT) - Key dates and times should be completed below :			
Detection :	Exchange Server Down	Actual Start Date :	06/18/2021 00:00:00
First Event/Alarm Date :	06/18/2021 00:00:00	First Call Date :	06/18/2021 00:00:00
Incident Open Date :	06/18/2021 00:00:00	Problem Date :	06/18/2021 00:00:00
Escalation :			
First Resolver Owner :	Jagadeep	Final Resolver Owner :	Jagadeep
Priority 1 Escalation :	Deepak		
Actions Taken :			
Diagnosis Date :	06/18/2021 00:00:00	Restoration Date :	06/18/2021 00:00:00
Recovery End Date :	06/18/2021 00:00:00		

Auto reminder can be set from notification rule engine for remind to fill the MPR form once major problem is closed.

## CHANGE PROBLEM STATUS

To change the status

1. Open the problem record in edit mode
2. From the drop down menu of the Status field, select the required status.
3. Upon selecting the status, tool will prompt to enter reason for status change.
4. Click on Submit.

Below are the available statuses for problem record

- **OPEN**: "This status is the default assignment value for all newly created problems, before they are assigned to a support group or individual for action".
- **PROGRESSING**: "Change to this status, when you begin work on the Problem.
- **PEND 3RDPARTY**: "Some type of action or information is required from a third party vendor.
- **PEND CLIENT**: "Some type of action or information is required from the end-client or contact.
- **REJECTED**: "Change to this status if work on the problem is false or duplicate record".
- **UNDER OBSERVATION**: "The Problem is ongoing issue and must be analyzed before further action can take place".
- **KNOWN ERROR** - Problem that has a documented root cause and a Workaround.
- **ASSIGNED** - When problem record is assigned to a support group or individual for action.
- **APPROVED** - When approver has approved the approval record.
- **RESOLVED** -"Change to this status when you have to resolve the Problem
- **CLOSED** -"Change to this status when you have to close the Problem.

Incident record can also auto close after defined period mentioned in notification rule engine.

### VIEW CI DETAILS FROM PROBLEM PAGE

Displays CI details, related tickets, CI history and graphical view of CI relationship. If any specific CI is linked to other CI then relationship will be displayed in next level.

The screenshot shows a 'Create Problem' form with the following fields and values:

- Client Name \***: Allied
- Requestor Name \***: Priya Lewis
- Location**: Mahape
- Contact No.**: 0802545432
- Preferred Contact**: Primary
- Status \***: OPEN
- Category/Sub Category/Item \***: (Empty)
- Impact \***: LOW
- Urgency \***: LOW
- Priority \***: P4
- Assignment Group \***: Choose one
- Technician Name**: Choose one
- Configuration Item**: CI-210526-0011 (highlighted with a red box)
- Channel \***: Choose one
- Opened By**: Jagadeep Vudatha
- Opened Date**: 06/30/2021 14:25:05
- Alternate Contact**: (Empty)
- Alternate Location**: (Empty)
- Vendor Ticket Number**: (Empty)

**ADCP-CHFD2\_D (CI-210526-0011) Details** ✕

[CI's Details](#) | [CI's Related Tickets \(3\)](#) | [CI's History](#) | [Relationship Graph](#)

---

**Client Name \*** Allied  | 
 **Requestor Name \*** SYSTEM.ADMIN  | 
 **Location \*** Mahape  | 
 **Contact No.**

**CI Name \*** ADCP-CHFD2\_D  | 
 **CI Type \*** Desktop  | 
 **Status \*** OPEN

**Assignment Group \*** Service Desk  | 
 **Technician Name** Choose one  | 
 **Alternate Contact**  | 
 **Alternate Location** Choose one

**Created By**  | 
 **Created On** 05/26/2021 17:07:43

**Short Description**  
 ADCP-CHFD2

**Additional Comments**  
 Paragraph






**ADCP-CHFD2\_D (CI-210526-0011) Details** ✕

[CI's Details](#) | [CI's Related Tickets \(3\)](#) | [CI's History](#) | [Relationship Graph](#)

ID	Status	Requestor Name	Assignment Group	Technician Name	Category	Sub Category	Item	Priority
<a href="#">IN-210625-0001</a>	OPEN	Priya Lewis	Network Support L2		HARDWARE	LAPTOP	LENOVO- X1 YOGA	P4
<a href="#">PR-210603-0001</a>	OPEN	Jagadeep Vudatha	Service Desk		SYSTEM	MONITORING	ALERT	P4
<a href="#">PR-210525-0001</a>	CLOSED	Deepak Shukla	Service Desk		SYSTEM	MONITORING	ALERT	P1

< > 1 1 - 3 of 3 items



- 
**CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**  
 CI Name :- ABCABCUSESUPWEB04 (CI-210526-0040) is attached with this CI
- 
**CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**  
 CI Name :- ABCABCINESDFCMBDB0 (CI-210526-0041) is attached with this CI
- 
**CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**  
 CI Name :- Canon Pixma G3000 (CI-210606-0001) is attached with this CI
- 
**CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**  
 CI Name :- Desktop CI (CI-210610-0001) is attached with this CI
- 
**CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**  
 CI Name :- DDCP-CHFD4 (CI-210610-0002) is attached with this CI

**ADCP-CHFD2\_D (CI-210526-0011) Details** ✕


[CI's Details](#) | 
 [CI's Related Tickets \(3\)](#) | 
 [CI's History](#) | 
 [Relationship Graph](#)



ID# : CI-210526-0011  
Type : Desktop  
CI Name : ADCP-CHFD2\_D

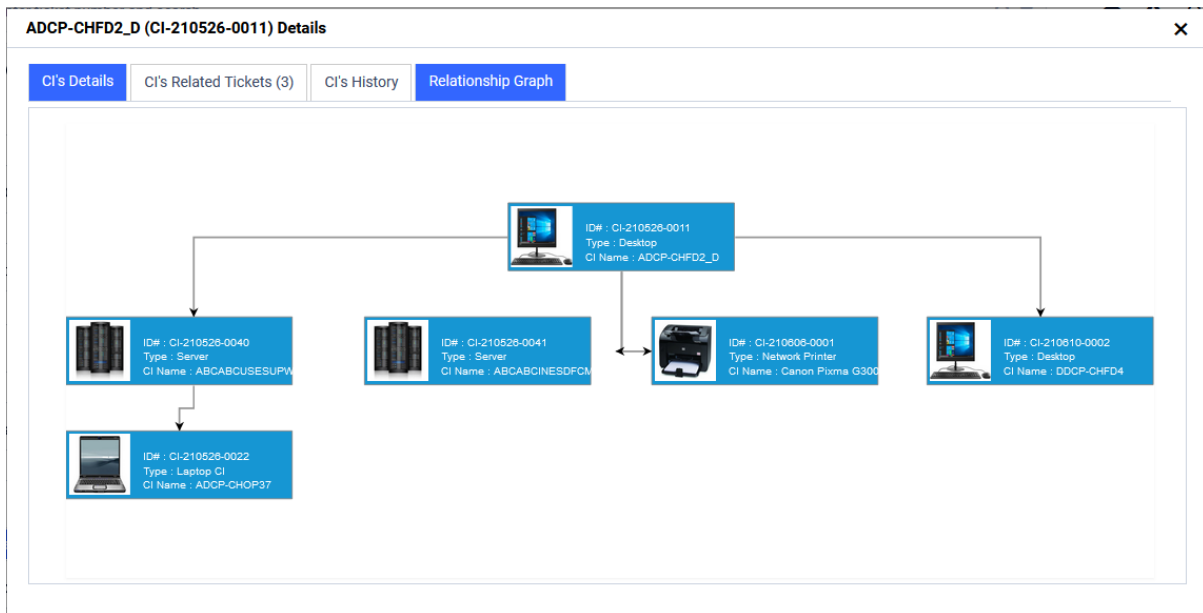
**ADCP-CHFD2\_D (CI-210526-0011) Details** ✕

[CI's Details](#) | 
 [CI's Related Tickets \(3\)](#) | 
 [CI's History](#) | 
 [Relationship Graph](#)



```

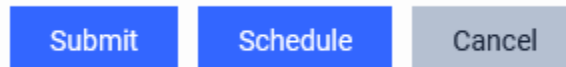
      graph TD
        A["ID# : CI-210526-0011  
Type : Desktop  
CI Name : ADCP-CHFD2_D"]
        B["ID# : CI-210526-0040  
Type : Server  
CI Name : ABCABCUSESUPW..."]
        C["ID# : CI-210526-0041  
Type : Server  
CI Name : ABCABCINESDFCM..."]
        D["ID# : CI-210606-0001  
Type : Network Printer  
CI Name : Canon Pixma G3000"]
        E["ID# : CI-210610-0002  
Type : Desktop  
CI Name : DDCP-CHFD4"]
        
        A --- B
        A --- C
        A --- D
        A --- E
    
```



## SCHEDULED PROBLEMS

**Create Scheduled Problem**- Scheduled ticket functionality benefits when there are some activities need to be executed at regular intervals. Once a ticket is scheduled, new ticket will be created and assigned to the specified support group automatically at the scheduled interval.

1. Navigate to **Problem** Module and click on **'Create New'**
2. Fill all \* marked mandatory fields and click on **'Schedule'**.



4. Displays scheduled dialog<sup>3</sup> box, Select Scheduler Type, Schedule from Date & Time
5. Click on **Submit**

**Deactivate Scheduled Problem** - Scheduled ticket can be mark as inactive by unchecking the Is Active checkbox.

1. Navigate to Problem Module and click on '**Scheduled Problems**'
2. Click on respective scheduled ticket and uncheck **Is Active** checkbox
3. Click on **Update**

Scheduled Id	Scheduled Type	Status	Scheduled Date & Time	Scheduled Details	Title	Requestor Name
SCH-200917-0004	Once	Inactive	09/17/2020 14:28:58		Exchange Server Down	venkatesh vudatha
SCH-200917-0003	Once	Active	09/17/2020 14:28:01		Intermittent Network Issue	venkatesh vudatha
SCH-200917-0002	Once	Active	09/17/2020 14:26:52		RAM Upgrade	venkatesh vudatha

## Knowledge Management

Knowledge Management Process helps the organizations to achieve their goals by making the best use of knowledge. It is the process of creating, sharing, using and managing the knowledge and information of an organization. This guide helps how to create a KB article and search in application.

### CREATE AN ARTICLE

There are two ways of creating knowledge articles.

1. From Main Menu, go to **Knowledge** Module → Click on '**Create New**'
2. Displays a new Article creation page
3. Enter all \* marked mandatory fields.
  - a. **Client Name**- This is a mandatory field and data is auto populated with client information.
  - b. **Status**- Mandatory field. There are different status available throughout the life cycle of Article. Initially all articles will be in '**DRAFT**' Status.

- c. **Category/ Sub Category/ Item-** Mandatory fields. These fields help to classify the type of article to be logged. Select the relevant category, subcategory and item to which article can be grouped.
- d. **Problem Title:** Provide a relevant title to the article.
- e. **Problem Description:** Provide a detailed description of article.
- f. **Assigned Group-** Mandatory field. Select appropriate support group to work on article.
- g. **Technician Name-** Agent can select the Technician from the list of agents from the selected Assigned Group which are displayed.
- h. **Source-** Mandatory field. It indicates source through which article is logged.
- i. **Type-** Articles will be grouped depend on the selected article type.
- j. **Available for** – There are 3 types visibility options provided.
  - **All-** Created article will be visible to all
  - **Agents Only-** Created article will be only visible to agents.
  - **Self-User only-** Created article will be only visible to agents.
- k. **Configuration Item-** Optional field. Related CI can be added to the ticket.
- l. **Tags-** New Tags can be added to article, which will help in searching article via '**Search related items**'.
- m. **Additional Link-** Optional field. Any related reference link can be added in this field.
- n. **Opened Date:** System auto captures date and time when article is created.
- o. **Opened By:** System auto captures name of the agent/ end user who has created the article.
- p. **Article Image:** Add a relevant image to article.
- q. **Solution:** Content/solution for the article. A preview of the content appears when browsing and searching for knowledge article

**ADiTaaS**  
CONQUERING COMPLEXITY

Jagadeep Vudatha  
Practice Manager

**Knowledge**

Create New

By Status

By Type

All Articles (30)

Scheduled Articles (0)

Calendar View

Problem

Change

Release

Task

Interaction

CMDB

ChatBot

Live Chat

Integration Hub

Visual Boards

Enter ticket number and search...

### Create Knowledge Article

**Add Attachment** **Submit**

**Client Name \***  
Allied

**Status \***  
DRAFT

**Category/Sub Category/Item \***

**Problem Title \***

**Problem Description \***

Paragraph **B I** [List] [Link] [Image] [Table] [Undo] [Redo]

**Assignment Group \***  
Choose one

**Technician Name**  
Choose one

**Source \***  
Choose one

**Type \***  
Choose one

**Available For \***  
Choose one

**Configuration Item**  
Choose one

**Tags**

**Additional Link**

**Opened By**  
Jagadeep Vudatha

**Opened Date**  
06/14/2021 17:26:48

**Article Image**


Browse... No file selected.  
Or Drag It Here.

**Solution \***

Paragraph **B I** [List] [Link] [Image] [Table] [Undo] [Redo]

**Submit** **Schedule** **Cancel**

4. Once all the required mandatory are filled, then click on **Submit** button.
5. Click on Add attachment button to add attachment during the ticket creation
6. New Article will be created with **unique ID**.



**Jagadeep Vudatha**  
Practice Manager

- Knowledge
  - Create New
  - By Status
  - By Type
  - All Articles (30)
  - Scheduled Articles (0)
  - Calendar View
- Problem
- Change
- Release
- Task
- Interaction
- CMDB
- ChatBot
- Live Chat
- Intergration Hub
- Visual Boards

Enter ticket number and search...
🔍

Update
Action
View Attachment(s)

KB Details
Activity Log
Approval (0)

Client Name *	Status *
Allied	LIVE
Category/Sub Category/Item *	Problem Title *
SOFTWARE/SOFTWARE INSTALLATION/MICROSOFT OFFICE	How to Set Up Microsoft Teams

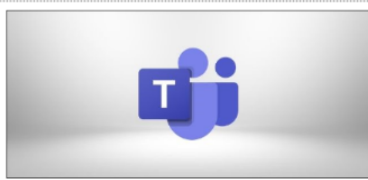
Problem Description \*

Paragraph

Microsoft Teams directly competes with Slack and will replace Skype for Business, as a premier collaborative communications platform for large and small businesses. Set up an organization in Teams and invite your colleagues to start chatting, sharing, and integrating.

Assignment Group *	Technician Name	Source *	Type *
Service Desk	Choose one	INTERNAL	HOW DO I
Available For *	Configuration Item	Tags	
ALL	Choose one		

Additional Link	Opened By	Opened Date
<a href="https://www.howtogeek.com/660743/how-to-set-up-microsoft-teams/">https://www.howtogeek.com/660743/how-to-set-up-microsoft-teams/</a>	Priya Lewis	06/14/2021 17:28:05



Article image

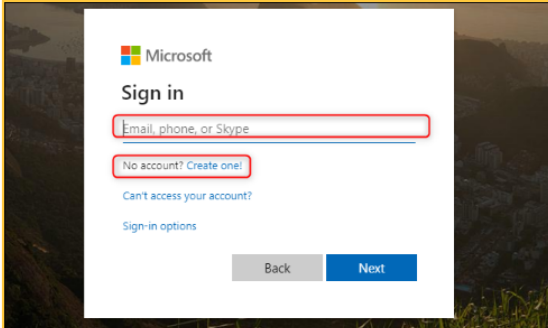
No file selected.

Or Drag It Here.

Solution \*

Paragraph

Direct any browser to [teams.microsoft.com](https://teams.microsoft.com) and sign in to your Microsoft account. You can create an account for free if you don't already have one.



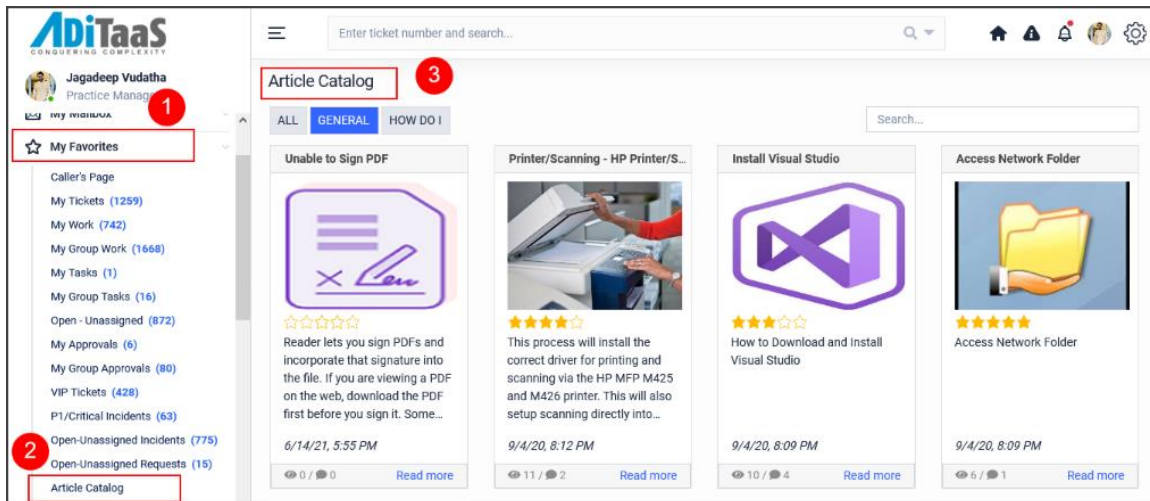
Once you're signed in to your Microsoft account, select "Get The Windows App" to download and install the app on your Windows, macOS, iOS, Android, or Linux device.

## LIVE ARTICLE

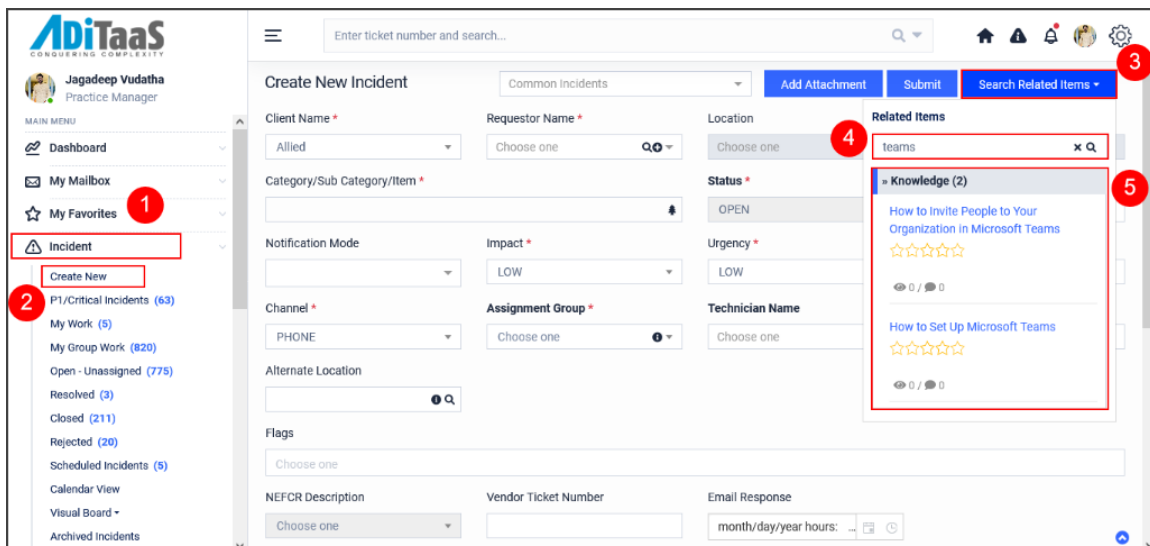
To make any article live, change article status to Live. Live article will be visible to agents and self- users.

## VIEW ARTICLE

- Agents can view all article under **my favorites** → **Article Catalog**
- Particular articles can be search either by clicking on **Article Type** or using **Search** option




- Create/edit a ticket, click on **Search related items** → type any relevant **title** or **tags** and click on Search icon. All related live articles will be visible.



- View the article and click on **Link** to bond particular article to selected ticket.

### How to Set Up Microsoft Teams

Oct 26, 2020, 12:34:51 PM  
Posted in [HOW DO I](#)  
★★★★★ 1 Reviews



**Problem Description:**  
Microsoft Teams directly competes with Slack and will replace Skype for Business, as a premier collaborative communications platform for large and small businesses. Set up an organization in Teams and invite your colleagues to start chatting, sharing, and integrating.

**Solution:**  
Direct any browser to "teams.microsoft.com" and sign in to your Microsoft account. You can create an account for free if you don't already have one.

**Tags**

Category: [LAPTOP DESKTOP, PRINTERS, OTHERS](#)

SubCategory: [HARDWARE, SOFTWARE](#)

Type: [HOW DO I](#)


[Link](#)

## WRITE/ VIEW REVIEWS

Click on **Reviews** to view the existing reviews.

### How to Set Up Microsoft Teams

Oct 26, 2020, 12:34:51 PM  
Posted in [HOW DO I](#)  
★★★★★ 1 Reviews



**Problem Description:**  
Microsoft Teams directly competes with Slack and will replace Skype for Business, as a premier collaborative communications platform for large and small businesses. Set up an organization in Teams and invite your colleagues to start chatting, sharing, and integrating.

**Solution:**  
Direct any browser to "teams.microsoft.com" and sign in to your Microsoft account. You can create an account for free if you don't already have one.

**Related KB Articles**

- [Adding a printer to a users PC](#)  
Nov 24, 2020
- [Unable to connect Remote Desktop](#)  
Nov 23, 2020
- [Start a video meeting from Meet](#)  
Nov 23, 2020
- [Printer/Scanning - HP Printer/Scanning setup for Windows 10 machines](#)  
Oct 26, 2020

**Tags**

Category: [LAPTOP DESKTOP, PRINTERS, OTHERS](#)

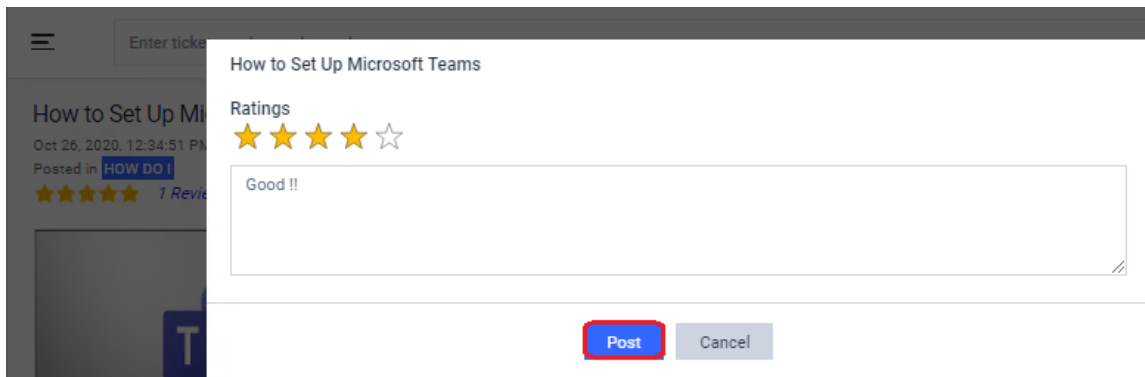
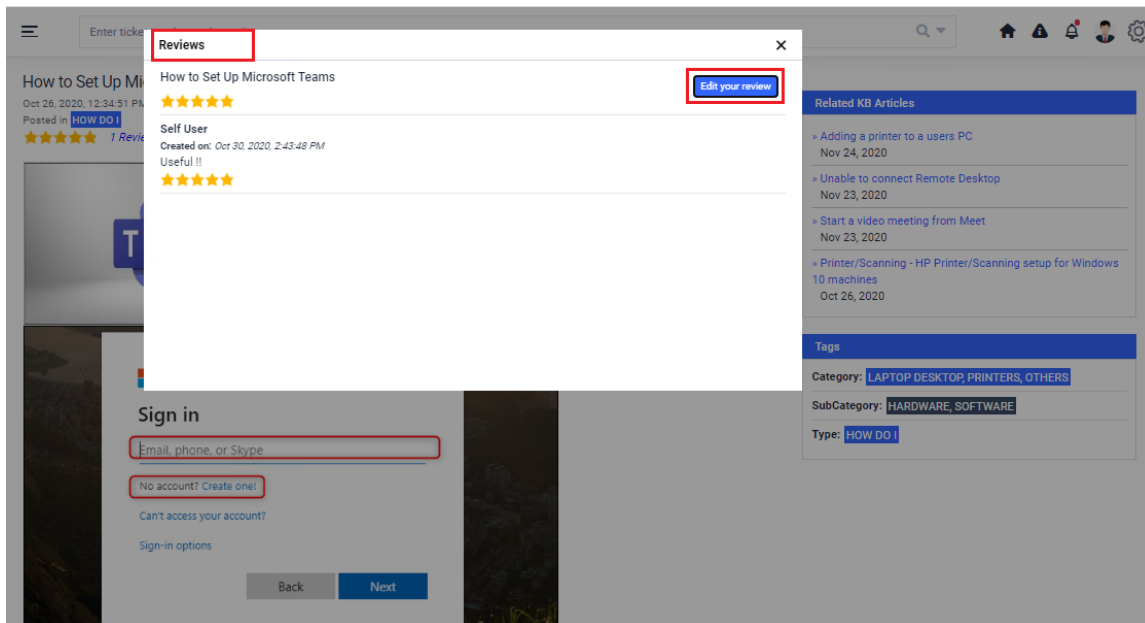
SubCategory: [HARDWARE, SOFTWARE](#)

Type: [HOW DO I](#)

1. To add/edit review, click on **Write/ Edit Review**
2. Provide rating by clicking on stars and provide feedback by writing in comment section.



### 3. Click on **POST**



#### RETIRE ARTICLE

To remove any article from catalog or mark it as inactive, change status to 'Retired'. Article will be removed from the catalog.

#### CREATE KB FROM INCIDENT/PROBLEM

While resolving any incident/problem there is an option provided as 'Create KB Article' in resolution tab to create an article.

If **Create KB Article** checkbox is checked while resolving the incident/problem, then Incident/Problem Title will be mark as Article Title, Incident/Problem Description will be mark as KB Problem description in article and resolution will be added as Solution. Article will be by default created in Draft status.

Edit Incident - IN-201029-0003

Update Action Search Related Items

Ticket Details Activity Log Task (0) Approval (0) Links (0) More Info Impacted CI (0) **Resolution**

**Resolution**

Resolution Method: 3RD PARTY Resolution Criteria\*: AD-HOC REPORTS Caused By\*: CANCELLED / NO ACTION REQUIRED Resolution CI: Choose one

Resolved By\*: UKBC Admin Resolution Date and Time\*:  Create KB Article

Watch List Email Id: Add Email Ids

Resolution Comments\*

Paragraph B I [List Bulleted] [List Numbered] [List None] [Image] [Quote] [Table] [Link] [Undo] [Redo]

Resolution steps are as below.

- 1.stop the application
2. write following commands
- 3.start application

Edit Problem - PR-210626-0001

Update Action Search Related Items

Ticket Details Activity Log Task (0) Approval (0) Links (0) Known Error Impacted CI (0) **Problem Closure**

**Problem Closure**

Resolution Method: Choose one Resolution Criteria\*: Choose one Caused By\*: Choose one Impacted CI\*: Choose one

Resolution Date Identified\*: Closed By\*: Jagadeep Vudatha Closed Time\*: 06/26/2021 07:04:32  Create KB Article

Resolution Recommendations\*

Paragraph B I [Link] [List Bulleted] [List Numbered] [List None] [Image] [Quote] [Table] [Video] [Link] [Undo] [Redo]

## ADD NOTES

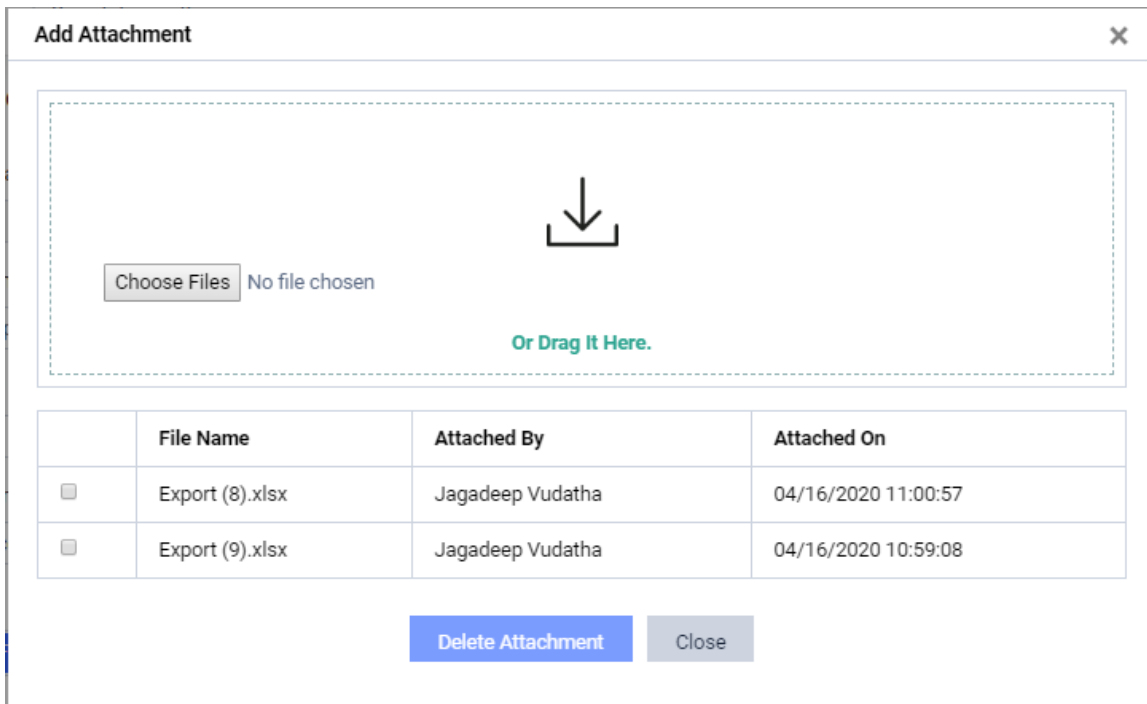
1. To add any additional information or work logs to ticket, click on **Action → Add Notes**.
2. Add Notes dialog box will open,
3. Click on checkbox to select required action items available on notes window
  - a. **Internal Notes:** Notes will be visible only agents. By default added notes will be visible for both agents and end users.
  - b. **Email this note to technician:** Email notification will be sent to assigned technician with added notes.
  - c. **Email this note to support group:** Email notification will be sent to all members of ticket assigned group with notes.

- d. **Watch list:** This functionality enables technician to add any email id to keep posted with ticket updates. Once email id is added to watch list, all noticeable members will receive notification on any status change, on notes added and on resolution of the ticket.
4. Enter the required comments/images/screenshots in the Notes section and click on **Add Notes**.

Added information will be visible in **Activity Log**.

#### ADD ATTACHMENT:

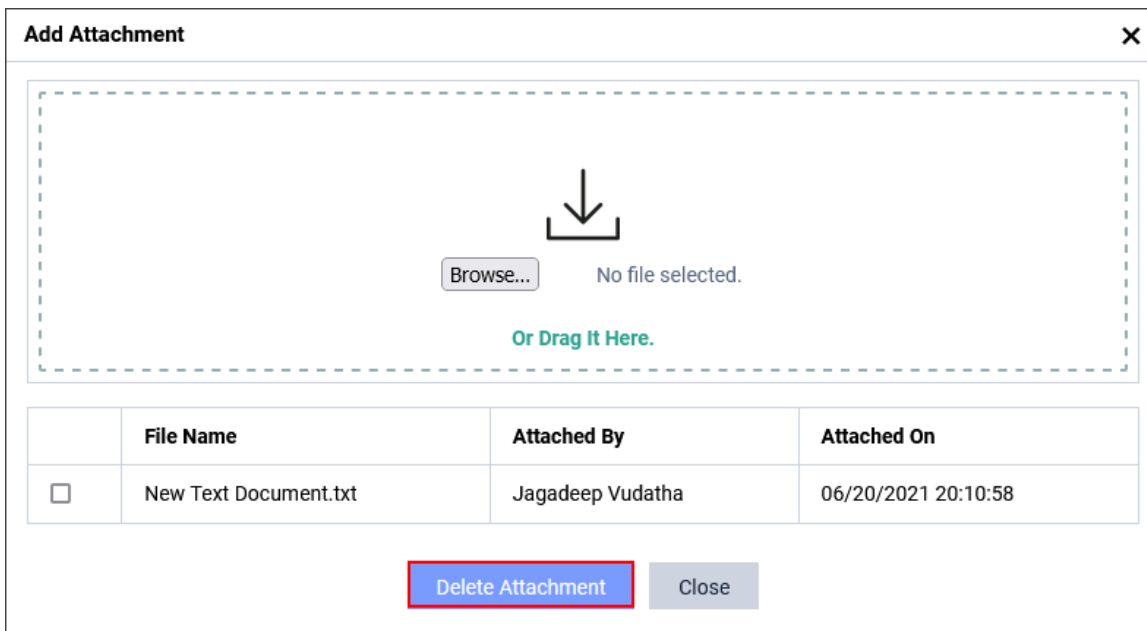
1. To add an attachment to a ticket, click on **Action → Add Attachment**.
2. On clicking will open up a new window.
3. From the file chooser window, choose the file to be attached or directly drag and drop the attachment to add.
4. Click open to upload the attachment.



All Uploaded attachments will be visible Under ‘**View Attachment**’ tab.

**DELETE/ REMOVE ATTACHMENT:**

To remove an attachment, click on respective attached attachment from the “**Add Attachment**” window and click on ‘**Delete Attachment**’.

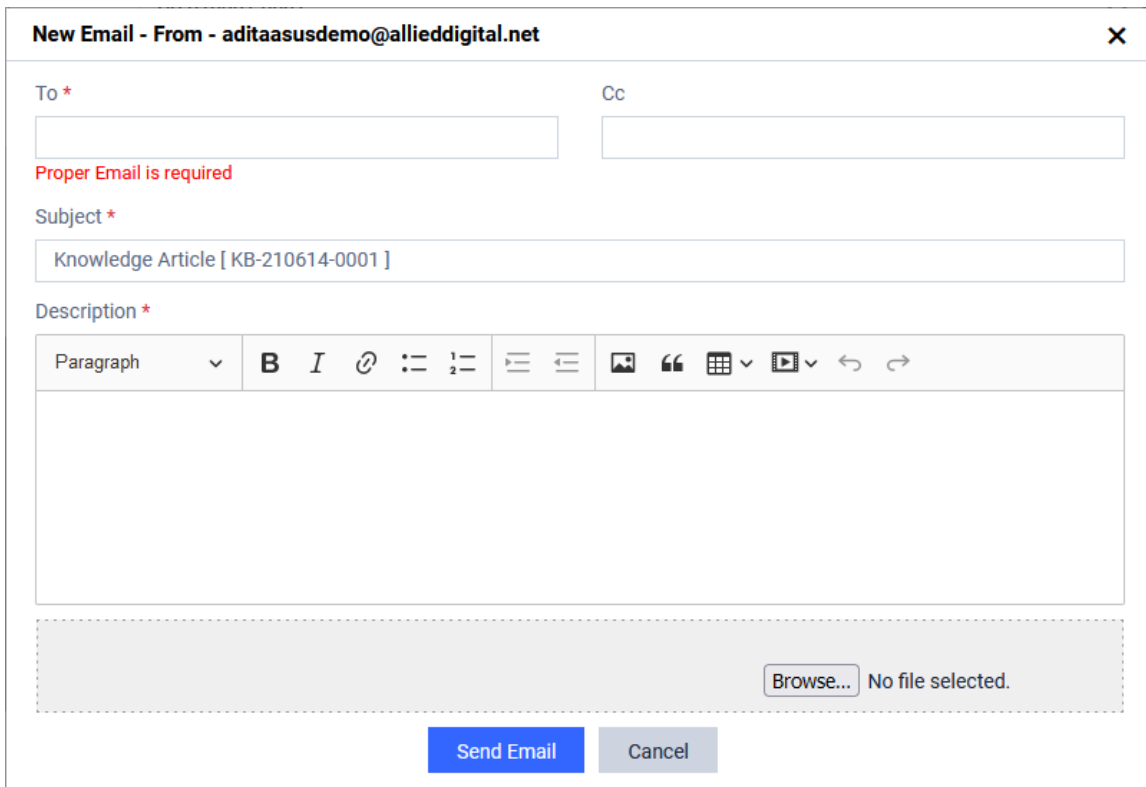


To quick delete an attachment , click on ‘**View Attachment**’ tab and go to respective attachment click on ‘x’ placed next to it.



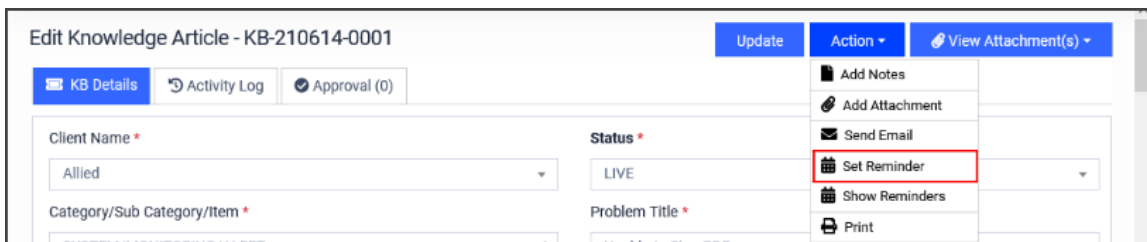
**SEND MAIL:**

1. To send an email from ticket, click on **Action → Send Email**.
2. New email template will be displayed, user email id and ticket id will be auto populated in 'To' and 'Subject' fields respectively. Attach any files by clicking the choose files.
3. When complete, click on 'Send Email'. All actions are captured in Activity Log.



**SET REMINDER**

Set reminder functionality allows agents to set a reminder to alert on some important tasks/events like contacting end user at specific given time or follow up on any task. It allow to put a date/time and option to select whomever you want to remind.



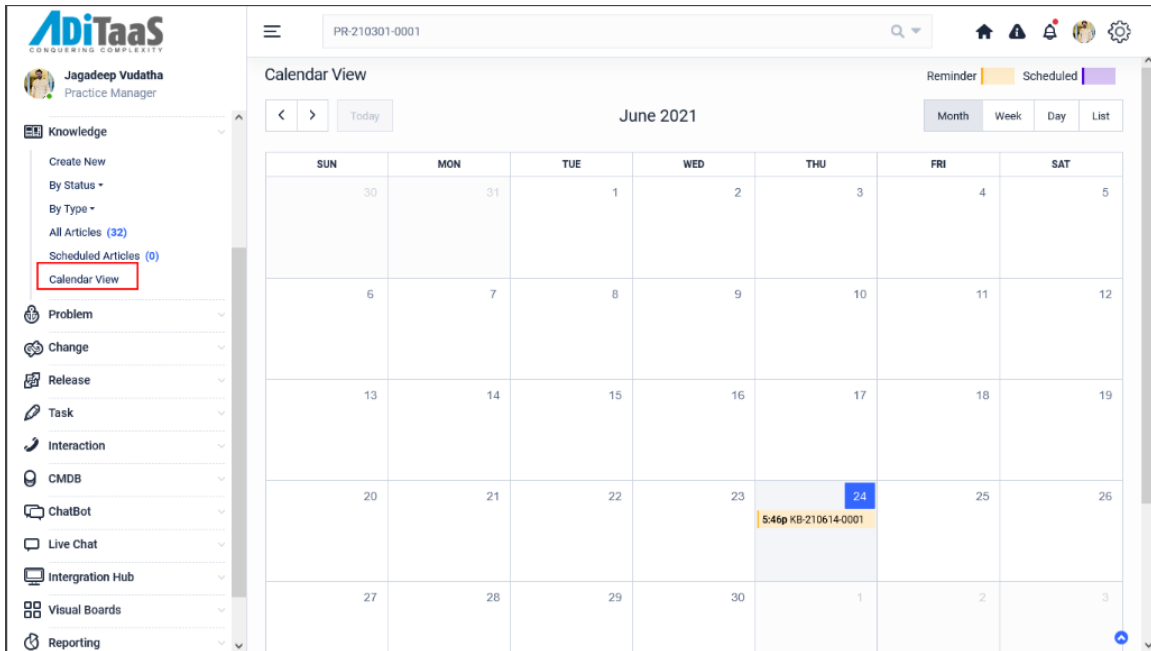
1. To a set reminder, click on **Action → Set Reminder**.

2. Set reminder dialog box is displayed. Enter the **Subject** and **Comments** in box.
3. Select checkbox, if required to send an email notification regarding the notification.
4. In select applicable option from “**To Whom**” drop down list.
  - **Remind me** – Reminder will be set for logged in agent.
  - **Support Group Members**- Reminder will be set for selected support group.
  - **Some else** – Provides option to set a reminder to specific person.
5. **Remind Time** –Select date/time to set a reminder.

## SHOW REMINDERS

All scheduled reminders will be visible under **Action** → **Show Reminders** as well as on **Calendar view**.

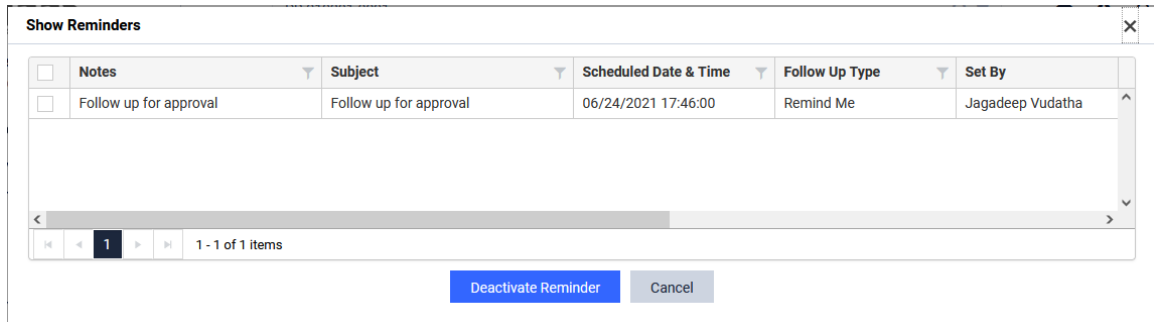
Notes	Subject	Scheduled Date & Time	Follow Up Type	Set By	
<input type="checkbox"/>	Follow up for approval	Follow up for approval	06/24/2021 17:46:00	Remind Me	Jagadeep Vudatha



## Deactivate the Reminder

Scheduled reminder can be deactivated with simple following steps.

1. Go to **Action** → **Show Reminders**
2. Select reminder by clicking on checkbox and click on Deactivate Reminder
3. Reminder Status will be marked as deactivated.



## PRINT A KNOWLEDGE ARTICLE

If you want to print an article, open required article need to be print,

Go to **Action** menu → Click on **Print**

Tool will display a print preview option. Print will display ticket details, activity log along with resolution details.

Click on **Print**





**Create New Incident**

Add Attachment
Submit
X

<b>Client Name *</b>	<b>Requestor Name *</b>	<b>Location</b>	<b>Contact No.</b>
<input type="text" value="Allied"/>	<input type="text" value="Jagadeep Vudatha"/> <span style="font-size: 0.8em;">🔍</span>	<input type="text" value="Mahape"/>	<input type="text" value="13104620926"/>
<b>Category/Sub Category/Item *</b>	<b>Status *</b>	<b>Preferred Contact</b>	
<input type="text"/>	<input type="text" value="OPEN"/>	<input type="text" value="Primary"/>	
<b>Notification Mode</b>	<b>Impact *</b>	<b>Urgency *</b>	<b>Priority *</b>
<input type="text"/>	<input type="text" value="LOW"/>	<input type="text" value="LOW"/>	<input type="text" value="P4"/>
<b>Channel *</b>	<b>Assignment Group *</b>	<b>Technician Name</b>	<b>Configuration Item</b>
<input type="text" value="PHONE"/>	<input type="text" value="Choose one"/>	<input type="text" value="Choose one"/>	<input type="text" value="Choose one"/>
<b>Alternate Contact *</b>	<b>Alternate Location</b>		
<input type="text"/>	<input type="text"/>		
<b>Flags</b>			
<input type="text" value="Choose one"/>			

Submit
Cancel

### New Request

Allows to raise a new request ticket from knowledge article. Article will be linked to the Request ticket.

Go to **Action** → **New Request**

**Create Request**

Add Attachment
Submit

<b>Client Name *</b>	<b>Requestor Name *</b>	<b>Location</b>	<b>Contact No.</b>
<input type="text" value="Allied"/>	<input type="text" value="Choose one"/> <span style="font-size: 0.8em;">🔍</span>	<input type="text" value="Choose one"/>	<input type="text"/>
<b>Category/Sub Category/Item *</b>	<b>Status *</b>	<b>Impact *</b>	
<input type="text"/>	<input type="text" value="OPEN"/>	<input type="text" value="LOW"/>	
<b>Urgency *</b>	<b>Priority *</b>	<b>Channel *</b>	<b>Assignment Group *</b>
<input type="text" value="LOW"/>	<input type="text" value="P4"/>	<input type="text" value="PHONE"/>	<input type="text" value="Choose one"/>
<b>Technician Name</b>	<b>Configuration Item</b>	<b>Alternate Contact</b>	<b>Alternate Location</b>
<input type="text" value="Choose one"/>	<input type="text" value="Choose one"/>	<input type="text"/>	<input type="text"/>
<b>Vendor Ticket Number</b>	<b>Opened By</b>	<b>Opened Date</b>	
<input type="text"/>	<input type="text" value="Jagadeep Vudatha"/>	<input type="text" value="06/24/2021 16:58:41"/>	
<b>Short Description *</b>			
<input type="text"/>			

### New Problem

Allows to raise a new problem ticket from knowledge article. Article will be linked to the problem ticket.

Go to **Action** → **New Problem**

**Create Problem**

Add Attachment
Submit
Search Related Items ▾

<b>Client Name *</b> <input type="text" value="Allied"/>	<b>Requestor Name *</b> <input type="text" value="Choose one"/>	<b>Location</b> <input type="text" value="Choose one"/>	<b>Contact No.</b> <input type="text"/>
<b>Preferred Contact</b> <input type="text" value="Primary"/>	<b>Status *</b> <input type="text" value="OPEN"/>	<b>Category/Sub Category/Item *</b> <input type="text"/>	
<b>Impact *</b> <input type="text" value="LOW"/>	<b>Urgency *</b> <input type="text" value="LOW"/>	<b>Priority *</b> <input type="text" value="P4"/>	<b>Assignment Group *</b> <input type="text" value="Choose one"/>
<b>Technician Name</b> <input type="text" value="Choose one"/>	<b>Configuration Item</b> <input type="text" value="Choose one"/>	<b>Channel *</b> <input type="text" value="Choose one"/>	<b>Opened By</b> <input type="text" value="Jagadeep Vudatha"/>
<b>Opened Date</b> <input type="text" value="06/24/2021 17:00:43"/>	<b>Alternate Contact</b> <input type="text"/>	<b>Alternate Location</b> <input type="text"/>	<b>Vendor Ticket Number</b> <input type="text"/>
<b>RCA Date Identified</b> <input type="text" value="month/day/year hours: ..."/>	<b>Notification Mode</b> <input type="text"/>	<b>Is Major *</b> <input type="radio" value="No"/>	<b>Problem Manager</b> <input type="text" value="Choose one"/>
<b>Problem Description *</b> <input style="height: 20px;" type="text"/>			

### New Change

Allows to raise a new change ticket from knowledge article. Article will be linked to the change ticket.

Go to **Action** → **New Change**

**Create Change**

Add Attachment
Submit

<b>Client Name *</b> <input type="text" value="Allied"/>	<b>Change Initiator *</b> <input type="text" value="Choose one"/>	<b>Location *</b> <input type="text" value="Choose one"/>	<b>Status *</b> <input type="text" value="OPEN"/>
<b>Category/Sub Category/Item *</b> <input type="text"/>		<b>Impact *</b> <input type="text" value="LOW"/>	<b>Urgency *</b> <input type="text" value="LOW"/>
<b>Priority *</b> <input type="text" value="P4"/>	<b>Change Type *</b> <input type="text" value="Choose one"/>	<b>Assignment Group *</b> <input type="text" value="Choose one"/>	<b>Change Owner</b> <input type="text" value="Choose one"/>
<b>Primary CI</b> <input type="text" value="Choose one"/>	<b>Opened By</b> <input type="text" value="Jagadeep Vudatha"/>	<b>Opened Date</b> <input type="text" value="06/24/2021 16:59:43"/>	
<b>Short Description *</b> <input style="height: 20px;" type="text"/>			

### KB ARTICLE ACTIVITY LOG

**Activity log** captures all actions performed on article from article creation to closure with date/time stamp along with user id. All modification performed on article are auto captured.

**Note:** Logs in the tool protected from alteration after-the-fact.

## APPROVALS

If a ticket requires formal approval before proceeding the case, Agent can create an approval manually by clicking on **Approval** → **Create New**.

### Create New

If a ticket requires formal approval before proceeding the case, Agent can create an approval manually by clicking on **Approval** → **Create New**.

Enter all \* marked mandatory fields.

The image shows two screenshots from a software interface. The top screenshot is titled 'Edit Knowledge Article - KB-210614-0001' and features tabs for 'KB Details', 'Activity Log', and 'Approval (0)'. The 'Approval' tab is active, showing a table with columns for 'Approval ID', 'Status', 'Comments', 'Sequence Of', and 'Approval'. A 'Create New' button is highlighted in red. The bottom screenshot is titled 'Create Approval' and contains the following fields: 'Approval For' (KB-210614-0001), 'Status \*' (OPEN), 'Approval Group \*' (Choose one), 'Approver' (Choose one), 'Submitted Date' (06/24/2021 17:05:48), and 'Sequence Of \*' (1). There is a rich text editor for 'Comments \*' and 'Submit' and 'Cancel' buttons at the bottom.

On submitting a request for approval, approver will receive an approval mail with a link to approve or reject the request.

**Edit Approval - AP-210624-0001**

Approval For: KB-210614-0001 | Status: OPEN | Approval Group: Regional Approval Group | Approver: Jagadeep Vudatha

Submitted Date: 06/24/2021 17:07:50 | Sequence Of: 1

Approver Comments: [Rich Text Editor]

Comments: Kindly provide approval

Buttons: Approve, Reject, Update, Cancel

All linked approvals will be visible under the Approval Tab. If the logged-in user is a managerial user, then he can open the approval and click on **Approve** or **Reject**.

### Detach Approval

To detach any approval, click on **'Detach Approval'** and enter the reason for detach.

**Edit Knowledge Article - KB-210614-0001**

KB Details | Activity Log | **Approval (0)**

» Approval | Create New | **Detach Approval**

Approval ID	Status	Comments	Sequence Of	Approval

**Do you want to detach the selected linked Approvals?**

Yes No

## Change Management

Change Management is responsible for controlling the lifecycle of changes. Its primary objective is to enable beneficial Changes to be made, with minimum disruption to IT Services.

### LOGGING CHANGE REQUEST

To create a new change request,

1. From main menu, go to **Change Module** → Click on '**Create New**'
2. Displays a new change request creation page
3. Enter all \* marked following mandatory fields.
  - a. **Client Name**- This is a mandatory field and data is auto populated with client information.
  - b. **Change Initiator**- Mandatory field. Select contact details of user who has requested for change. If user information is not present then new contact can be created by using add contact feature. You can use search button to find the existing contact.
  - c. **Location**- Mandatory field. Auto populates user location from system.
  - d. **Category/ Sub Category/ Item**- Mandatory field. This fields helps to classify type of change requests logged. Select the relevant category, subcategory and item to which change can be grouped.

- e. **Status-** Mandatory field. There are different status available throughout the life cycle of change request. Initially all ticket will be set to 'OPEN' Status.
- f. **Priority-** Mandatory field .By default change priority is set to 'P4'. Depend on impact and urgency of the change agent can change the priority.
- g. **Impact-** Mandatory field .Ticket impact can change to 'HIGH', 'MEDIUM' or 'LOW' depend on impact.
- h. **Risk-** Mandatory field .Ticket risk can change to 'HIGH', 'MEDIUM' or 'LOW' depend on risk.
- i. **Change Type-** Mandatory field .Change Type indicates type of change request. Values can be NORMAL, EMERGENCY OR STANDARD.
- j. **Assigned Group-** Mandatory field. Select appropriate support group to work on change. T
- k. **Change Owner-** Assign ticket to individual. On clicking search option list of change owner names will appears.
- l. **Primary CI-** Optional field. Related CI can be added to the ticket.
- m. **Opened Date:** System auto captures date and time when change is created.
- n. **Opened By:** System auto captures name of the agent/ end user who has created the change.
- o. **Short Description:** Provide a relevant title to the change that will exactly summarize the change request.
- p. **Change Description:** Provide a detailed description with any other associated details relevant to the change.
- q. **Reason for change-** Enter the reason for change implementation.
- r. **Risk and Impact Details-** Risk impact is an estimate of the potential losses associated with an identified risk. It is a standard risk analysis practice to develop an estimate of probability and impact.

Risk and Impact Details			
Availability Choose one	Affects Public Facing Services Choose one	Backup Available Choose one	Users Impacted Choose one
Previously Executed Choose one	Backup Tested Choose one	DR/Failover Available Choose one	3rd Party Support Choose one
Backup Duration Choose one			

- s. **Change Schedule-** Enter the planned start date and planned end date from the calendar selection icon.

Change Schedule			
Planned Start Date* month/day/year hours: ...	Planned End Date* month/day/year hours: ...	Actual Start Date month/day/year hours: ...	Actual End Date month/day/year hours: ...

- t. **Mitigation and Test Plan- Mitigation plan** outlines the planning process for identifying and implementing actions to reduce or eliminate business losses/functions due to any type of hazards. **Test plan** conveys how **testing** will be performed at a particular level or for a particular type of **testing**.

4. Once all the required mandatory are filled and click on **Submit** button.
5. Click on **Add attachment** button to add attachment during the ticket creation
6. New change will be created with **unique change ID** and an email notification is sent to confirm that the ticket has been logged.

## COMMON CHANGES

Creating individual form for each change template for the most frequently raised change such as, RAM Upgrade, Server Upgrade etc. The fields can be pre filled with values so that a change can be created instantly. Under Administration module all templates can be configured and during the change request creation all configured templates will be displayed under common changes drop down.

1. Navigate to **Change Module** from left menu bar
2. Click on Create New, displays new change creation page
3. Select the required Create New template from **common changes** drop down
4. The fields can be pre filled with values
5. Enter the Requestor name and any additional information if any
6. Click on **Submit**

## CHANGE DATA GRIDS

**My work/ My group work-** Once change is logged, Agent can view change which are assigned to him under 'My Work' and all the changes which are assigned to his groups are visible under 'Group Work' tab.

Go to **Change** module → Click on 'My Work' or 'My Group Work'

	ID Number	Title	Description	Change Initiator	Category
<input type="checkbox"/>	CR-210624-0003	RAM Upgrade	RAM Upgrade	Jagadeep Vudatha <span>YIP</span>	Software
<input type="checkbox"/>	CR-210624-0002	jagadeep.vudatha@gma...	jagadeep.vudatha@gmail.c...	Jagadeep Vudatha <span>YIP</span>	Software
<input type="checkbox"/>	CR-210624-0001	Browser Compatibility Is...	Description*Browser Name...	Priya Lewis	Software
<input type="checkbox"/>	CR-210610-0001	Ad account locked	Ad account locked	Priya Lewis	Software
<input type="checkbox"/>	CR-210605-0001	Laptop not working	Laptop not working	Jagadeep Vudatha <span>YIP</span>	Software
<input type="checkbox"/>	CR-210325-0002	Server Upgrade	Server Upgrade	Jagadeep Vudatha <span>YIP</span>	ENTERPRISE INFORMATION MANAGEM
<input type="checkbox"/>	CR-210309-0001	Monthly Maintenance A...	Monthly Maintenance Activi...	Priya Lewis	HARDWARE
<input type="checkbox"/>	CR-201217-0001	Upgrade Network Band...	Upgrade Network Bandwidth	Jagadeep Vudatha <span>YIP</span>	HARDWARE
<input type="checkbox"/>	CR-201127-0003	Monthly Maintenance A...	Monthly Maintenance Activi...	Nick McDonald	HARDWARE
<input type="checkbox"/>	CR-201120-0002	Upgrade Network Band...	Upgrade Network Bandwidth	Jagadeep Vudatha <span>YIP</span>	HARDWARE

**Standard changes** – Displays list of Standard changes.

**Normal Changes-** Displays list of Normal changes.

**Emergency Changes-** Displays list of Emergency changes.

**All Changes** - Displays list of all changes.

**Closed** – Displays all closed changes.

**Rejected** - Displays all rejected changes.

**Scheduled Changes** - Displays all scheduled changes

**Calendar View-** Displays scheduled problems, set reminders on calendar view



## EDIT/ UPDATE CHANGE

On successful creation of ticket, system will generate unique ticket id. Ticket id starts with date and number. **CR** indicates change ticket.

Agent can perform more actions on edit change screen, where agent can modify the information in the screen and click on Update button to save the changes.

## ADD NOTES

1. To add any additional information or work logs to ticket, click on **Action → Add Notes**.
2. Add Notes dialog box will open, Enter comments and click on Add Notes

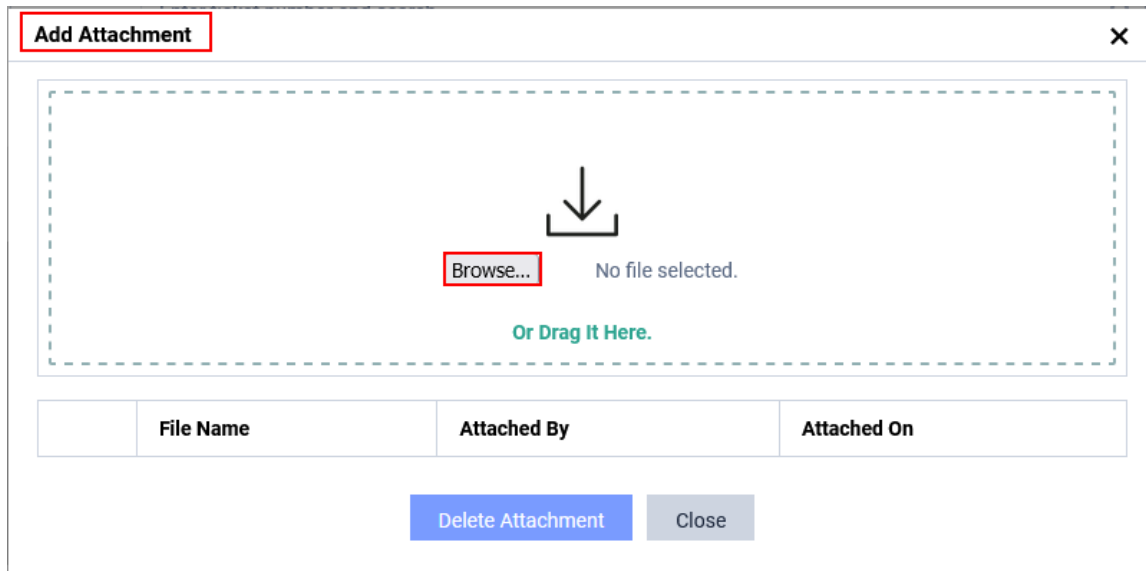
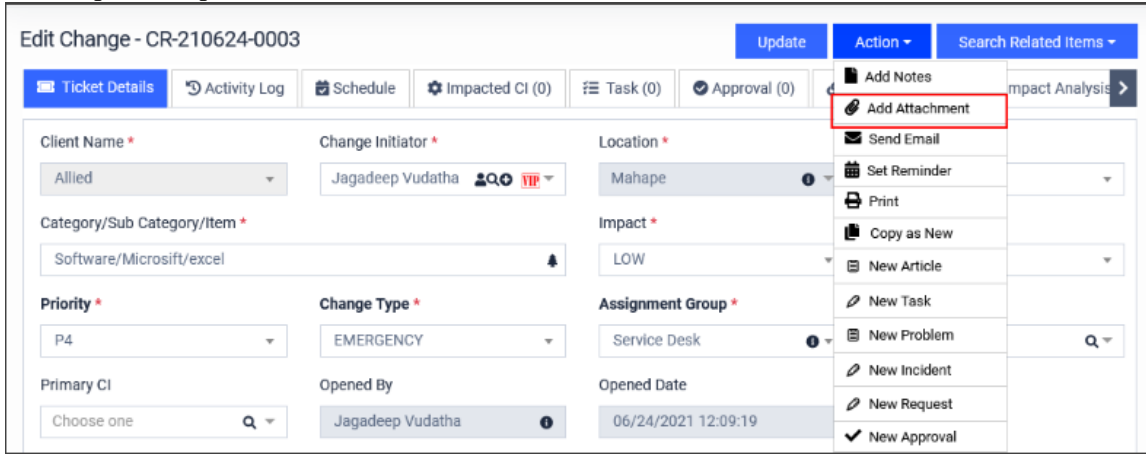
The screenshot displays the 'Edit Change - CR-210624-0003' interface. The 'Action' dropdown menu is open, highlighting 'Add Notes'. Below, the 'Add Notes' dialog box is shown with the following elements:

- Internal Notes:**
- Email this note to Support Group:**
- Email this note to Requestor:**
- Email this note to Technician:**
- Watch List Email Id:** Add Email Ids
- Notes \*:** A rich text editor containing the text: "Implementation team is working on this on this request".
- Buttons:** 'Add Notes' and 'Cancel'.

Added information will be visible in **Activity Log**.

**ADD ATTACHMENT:**

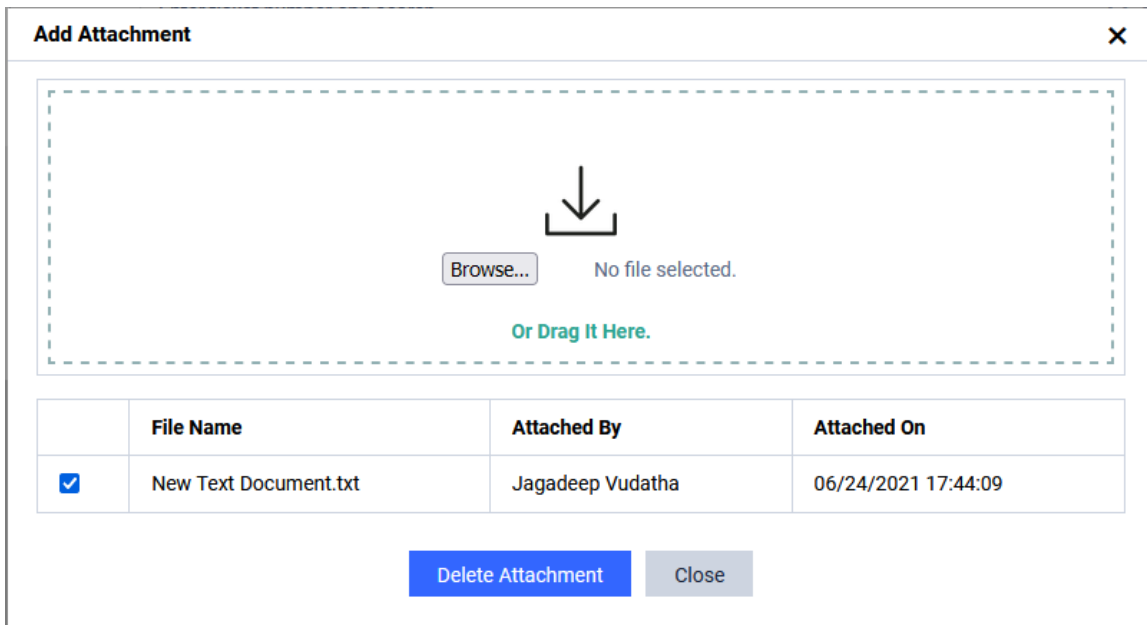
1. To add an attachment to a ticket, click on **Action → Add Attachment**.
2. On clicking will open up a new window.
3. From the file chooser window, choose the file to be attached
4. Click open to upload the attachment.



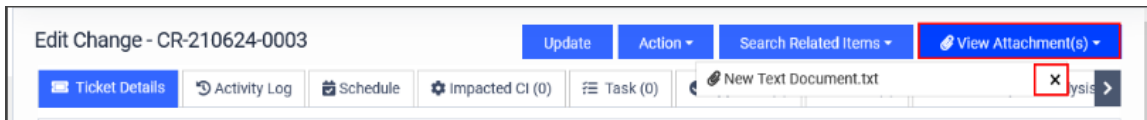
All Uploaded attachments will be visible Under '**View Attachments**' tab.

**DELETE/ REMOVE ATTACHMENT:**

To remove an attachment, click on respective attached attachment and click on '**Delete Attachment**'.

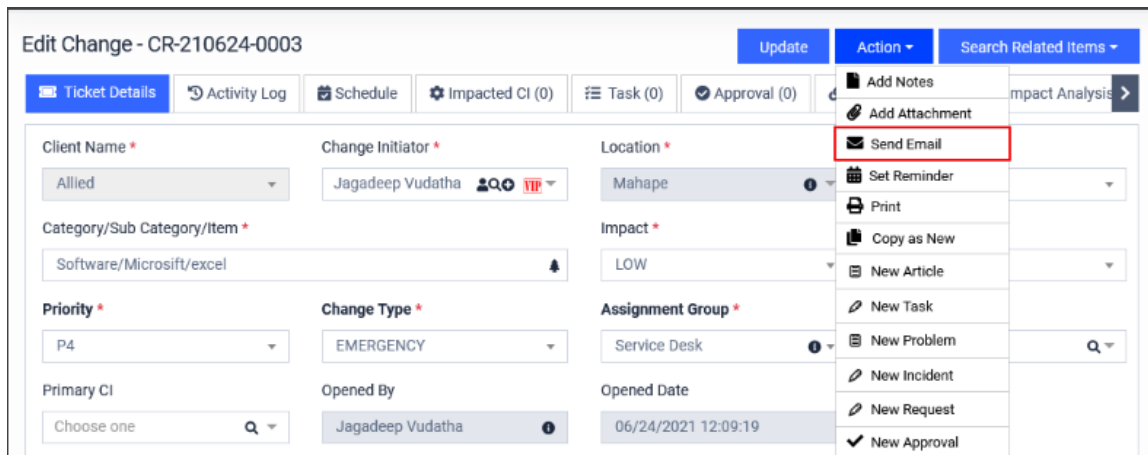


To quick delete an attachment , click on ‘Attachment’ tab and go to respective attachment click on ‘x’ placed next to it.



**SEND MAIL:**

1. To send an email from ticket, click on **Action → Send Email**.



2. Compose email, user email id and ticket id will be auto populated in ‘To’ and ‘Subject’ fields respectively. Attach any files by clicking the choose files.

3. When complete, click on 'Send Email'. All actions are captured in Activity Log.

### SET REMINDER

Set reminder functionality allows agents to set a reminder to alert on some important tasks/events like contacting end user at specific given time or follow up on any task. It allow to put a date/time and option to select whomever you want to remind.

1. To a set reminder, click on **Action → Set Reminder**.
2. Set reminder dialog box is displayed. Enter the **Subject** and **Comments** in box.
3. Select checkbox, if required to send an email notification regarding the notification.

4. In select applicable option from ‘To Whom’ drop down list.
  - a. **Remind me** – Reminder will be set for logged in agent.
  - b. **Support Group Members**- Reminder will be set for selected support group.
  - c. **Some else** – Provides option to set a reminder to specific person.
5. **Remind Time** –Select date/time to set a reminder.

**Set Reminder** ✕

Subject \*

Comments \*

Send Email

To Whom \* Remind Time\*

Remind Me ▼

06/21/2021 06:00:00 📅 ⌚

Submit
Cancel

## SHOW REMINDERS

All scheduled reminders will be visible under **Action → Show Reminders** as well as on **Calendar view**.

**Edit Change - CR-210624-0003** Update **Action** Search Related Items View Attachment(s)

Ticket Details
Activity Log
Schedule
Impacted CI (0)
Links (0)
Risk & Impact Analysis

Client Name \* Change Initiator \*

Allied Jagadeep Vudatha

Category/Sub Category/Item \*

Software/Microsoft/excel

Priority \* Change Type \*

P4 EMERGENCY

Primary CI Opened By

Choose one Jagadeep Vudatha

Short Description \*

**Action** ▼

- Add Notes
- Add Attachment
- Send Email
- Show Reminders**
- Print
- Copy as New
- New Article
- New Task
- New Problem
- New Incident
- New Request
- New Approval

Status \* Urgency \*

OPEN LOW

Change Owner

Choose one

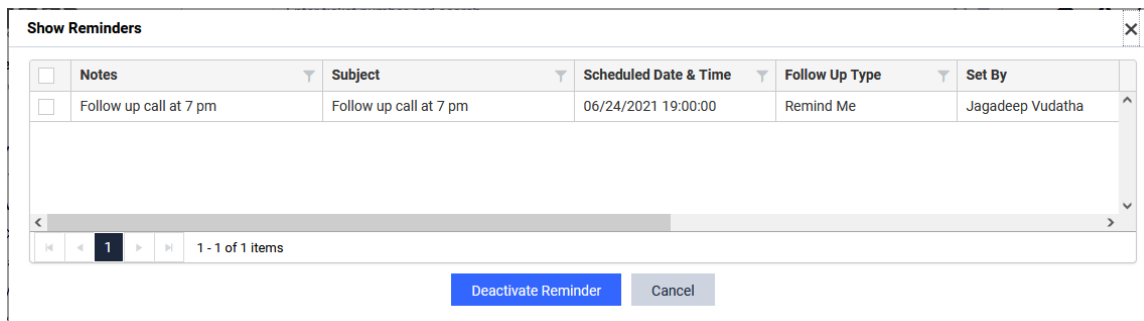
**Show Reminders** ✕

<input type="checkbox"/>	Notes	Subject	Scheduled Date & Time	Follow Up Type	Set By
<input type="checkbox"/>	Follow up call at 7 pm	Follow up call at 7 pm	06/24/2021 19:00:00	Remind Me	Jagadeep Vudatha

Deactivate Reminder
Cancel

## Deactivate the Reminder

Scheduled reminder can be deactivated with simple following steps.



1. Go to **Action**→**Show Reminders**
2. Select reminder by clicking on checkbox and click on **Deactivate Reminder**
3. Reminder Status will be marked as deactivated.

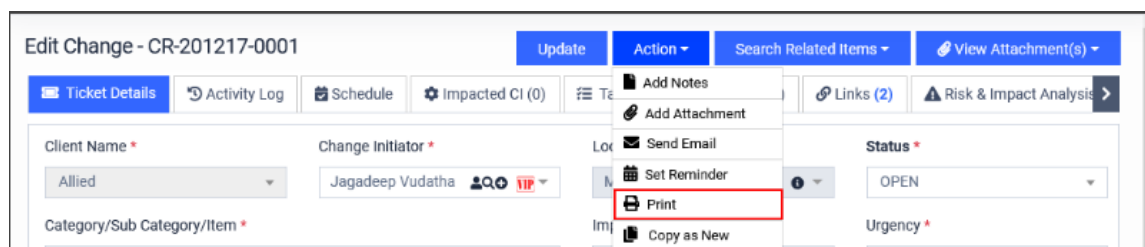
## PRINT A CHANGE REQUEST

If you want to print a change ticket, open required change ticket need to be print,

Go to **Action** menu → Click on **Print**

Tool will display a print preview option. Print will display ticket details, activity log along with closure details.

Click on **Print**



**Change Details**

Number :	CR-201217-0001	Client Name :	Allied
Opened By :	Jagadeep Vudatha	Opened Date :	12/17/2020 13:03:13
Change Initiator ID :	jvudatha	Change Initiator :	Jagadeep Vudatha
Location :	Mahape	Email :	jagadeep.vudatha@gmail.com
Mobile :	13104620926	Primary CI :	
Category :	HARDWARE	Sub Category :	REPLACEMENT
Item :	MACHINE SHIFT	Status :	OPEN
Impact :	LOW	Priority :	P4
Risk :	MEDIUM	Change Type :	NORMAL
Assignment Group :	Service Desk	Change Owner :	
Short Description :	Upgrade Network Bandwidth		
Change Description :	Upgrade Network Bandwidth		
Reason for change :	Reason for Change		

**Schedule :**

Planned Start Date :	12/18/2020 00:00:00	Planned End Date :	12/19/2020 00:00:00
Actual Start Date :		Actual End Date :	

**Risk & Impact Analysis :**

Availability :		Affects Public Facing Services :	NO
Backup Available :	NO	Users Impacted :	
Previously Executed :		Backup Tested :	
DR/Failover Available :		3rd Party Support :	
Backup Duration :			

**Backout & Test Plan :**

Test Plan :		Backout Plan :	
-------------	--	----------------	--

**Activity Log :**

**Email Sent On 06/15/2021 16:24:26 by user = Jagadeep Vudatha**

From :- aditaasusdemo@alieddigital.net  
 To :- jagadeep.vudatha@gmail.com  
 Subject : Change [ CR-201217-0001 ]  
 Attachments :- index.png  
 Mail Body :  
 Kindly provide more information

**Attachment added on 06/15/2021 13:08:55 by user = Jagadeep Vudatha**

Attachment Name:- fill-and-sign.png, Added by user = Jagadeep Vudatha

**Attachment added on 06/15/2021 13:03:09 by user = Jagadeep Vudatha**

Attachment Name:- index.png, Added by user = Jagadeep Vudatha

**Notes added on 06/15/2021 12:55:49 by user = Jagadeep Vudatha**

Implementation team is working on this request.

## COPY AS NEW

Copy As New copies the details of an existing change record to a new change record. Instead of re-entering all the information for new user

1. Click on **Action** → **Copy as New**
2. Copy As New dialog box will open to enter the **Requestor Name**

**Edit Change - CR-210624-0003**

Update | Action | Search Related Items

Ticket Details | Activity Log | Schedule | Impacted CI (0) | Task (0) | Approval (0)

Client Name \* | Change Initiator \* | Location \*  
 Allied | Jagadeep Vudatha | Mahape

Category/Sub Category/Item \* | Impact \*  
 Software/Microsoft/excel | LOW

Priority \* | Change Type \* | Assignment Group \*  
 P4 | EMERGENCY | Service Desk

Primary CI | Opened By | Opened Date  
 Choose one | Jagadeep Vudatha | 06/24/2021 12:09:19

Impact Analysis

- Add Notes
- Add Attachment
- Send Email
- Set Reminder
- Print
- Copy as New**
- New Article
- New Task
- New Problem
- New Incident
- New Request
- New Approval

**Copy As New**

Requestor Name \*

Priya Lewis

Create | Cancel

3. Search and select required **Requestor Name** and Click **Submit**.

## QUICK LINKS TO CREATE TICKET FROM CHANGE

### New Request

Allows to raise a new request ticket from change ticket.

Go to **Action** → **New Request**

**Edit Change - CR-210624-0003**

Update | Action | Search Related Items

Ticket Details | Activity Log | Schedule | Impacted CI (0) | Task (0) | Approval (0)

Client Name \* | Change Initiator \* | Location \*  
 Allied | Jagadeep Vudatha | Mahape

Category/Sub Category/Item \* | Impact \*  
 Software/Microsoft/excel | LOW

Priority \* | Change Type \* | Assignment Group \*  
 P4 | EMERGENCY | Service Desk

Primary CI | Opened By | Opened Date  
 Choose one | Jagadeep Vudatha | 06/24/2021 12:09:19

Impact Analysis

- Add Notes
- Add Attachment
- Send Email
- Set Reminder
- Print
- Copy as New
- New Article
- New Task
- New Problem
- New Incident
- New Request**
- New Approval

### New Task

Allows to raise a new task ticket from change ticket.



Go to Action → New Task

The screenshot shows the 'Edit Change - CR-210624-0003' interface. The 'Action' dropdown menu is open, and the 'New Task' option is highlighted with a red box. The form fields are as follows:

Client Name *	Change Initiator *	Location *
Allied	Jagadeep Vudatha	Mahape
Category/Sub Category/Item *	Impact *	Assignment Group *
Software/Microsoft/excel	LOW	Service Desk
Priority *	Change Type *	Opened Date
P4	EMERGENCY	06/24/2021 12:09:19
Primary CI	Opened By	
Choose one	Jagadeep Vudatha	

New Approval

Allows to raise an approval ticket from change ticket.

Go to Action → New Approval

The screenshot shows the 'Edit Change - CR-210624-0003' interface. The 'Action' dropdown menu is open, and the 'New Approval' option is highlighted with a red box. The form fields are as follows:

Client Name *	Change Initiator *	Location *
Allied	Jagadeep Vudatha	Mahape
Category/Sub Category/Item *	Impact *	Assignment Group *
Software/Microsoft/excel	LOW	Service Desk
Priority *	Change Type *	Opened Date
P4	EMERGENCY	06/24/2021 12:09:19
Primary CI	Opened By	
Choose one	Jagadeep Vudatha	

New Incident

Allows to raise a new incident ticket from change ticket.

Go to Action → New Incident

**Edit Change - CR-210624-0003**

Update | Action | Search Related Items

Ticket Details | Activity Log | Schedule | Impacted CI (0) | Task (0) | Approval (0)

Client Name \* Allied | Change Initiator \* Jagadeep Vudatha | Location \* Mahape

Category/Sub Category/Item \* Software/Microsoft/excel | Impact \* LOW

Priority \* P4 | Change Type \* EMERGENCY | Assignment Group \* Service Desk

Primary CI Choose one | Opened By Jagadeep Vudatha | Opened Date 06/24/2021 12:09:19

Action Menu:

- Add Notes
- Add Attachment
- Send Email
- Set Reminder
- Print
- Copy as New
- New Article
- New Task
- New Problem
- New Incident**
- New Request
- New Approval

### New Problem

Allows to raise a new problem ticket from change ticket.

Go to **Action** → **New Problem**

**Edit Change - CR-210624-0003**

Update | Action | Search Related Items

Ticket Details | Activity Log | Schedule | Impacted CI (0) | Task (0) | Approval (0)

Client Name \* Allied | Change Initiator \* Jagadeep Vudatha | Location \* Mahape

Category/Sub Category/Item \* Software/Microsoft/excel | Impact \* LOW

Priority \* P4 | Change Type \* EMERGENCY | Assignment Group \* Service Desk

Primary CI Choose one | Opened By Jagadeep Vudatha | Opened Date 06/24/2021 12:09:19

Action Menu:

- Add Notes
- Add Attachment
- Send Email
- Set Reminder
- Print
- Copy as New
- New Article
- New Task
- New Problem**
- New Incident
- New Request
- New Approval

### New Article

Allows to raise an article from change ticket.

Go to **Action** → **New Article**

## CHANGE ACTIVITY LOG

**Activity log** captures all actions performed on ticket from change creation to closure with date/time stamp along with agent id. All modification performed on ticket is auto captured. From the creation of ticket to resolution all activities are captured with order. All activities like add notes, add attachment, setting a reminder, creating task, creating approvals, linking tickets, linking CI's all activities are capture in activity log with sequence

**Filter** option at the top provides a facility to search for specific activity log or activity log of record for specific duration.

**Activity Type** displays list activities in drop down list. On selecting specific activity type activity log displays logs accordingly.

**Log Title** allows to enter relevant keyword in given text field, depend on keyword displays the activity log

**From and To date** allows to find activity log for specific duration

**Note:** Logs in the tool protected from alteration after-the-fact.

## TASK

Agent can create a new Task and link to change request or open any existing tasks and can link to change. Change ticket cannot be resolved until all linked tasked are closed.

**Create New**- Click on **Task** → **Create New** to create a new Task.

**Link Existing Task**- To link existing link Tasks, click on **Task** → **Link Existing Task**  
Displays list of existing Tasks. Agent can link one or more tasks to change request by clicking on checkboxes.

ID	Requestor Name	Assignment Group	Technician Name	Status	Sequence	Opened Date	Created By	Last M
<input checked="" type="checkbox"/>	T-200225-0001	Jagadeep Vudatha	Service Desk	OPEN	1	02/25/2020 10:11:47	Jagadeep Vudatha	
<input type="checkbox"/>	T-200218-0001	Ravi vardhan	Service Desk	OPEN	1	02/18/2020 09:38:52	Jagadeep Vudatha	
<input type="checkbox"/>	T-200129-0001	Jagadeep Vudatha	Service Desk	OPEN	1	01/29/2020 15:07:08	Jagadeep Vudatha	
<input type="checkbox"/>	T-200128-0001	Leah Bostic	Service Desk	OPEN	1	01/28/2020 16:58:46	Jagadeep Vudatha	
<input type="checkbox"/>	T-200127-0004	Jagadeep Vudatha	Service Desk	OPEN	1	01/27/2020 11:45:57	Jagadeep Vudatha	
<input type="checkbox"/>	T-200127-0003	Jagadeep Vudatha	Server Support L2	OPEN	1	01/27/2020 11:39:41	Jagadeep Vudatha	
<input type="checkbox"/>	T-200127-0002	Edwin Toh	Service Desk	OPEN	1	01/27/2020 11:36:38	Jagadeep Vudatha	
<input type="checkbox"/>	T-200127-0001	Jagadeep Vudatha	Service Desk	OPEN	1	01/27/2020 11:34:39	Jagadeep Vudatha	

**Detach Task**- Select respective Task and click on **'Detach Task'** to unlink it.

Task ID	Approval ID	Task Name	Requestor Name	Assignment Group	Status	Sequence
<input checked="" type="checkbox"/>	T-210625-0009	Check Application Status	Jagadeep Vudatha	Service Desk	OPEN	1

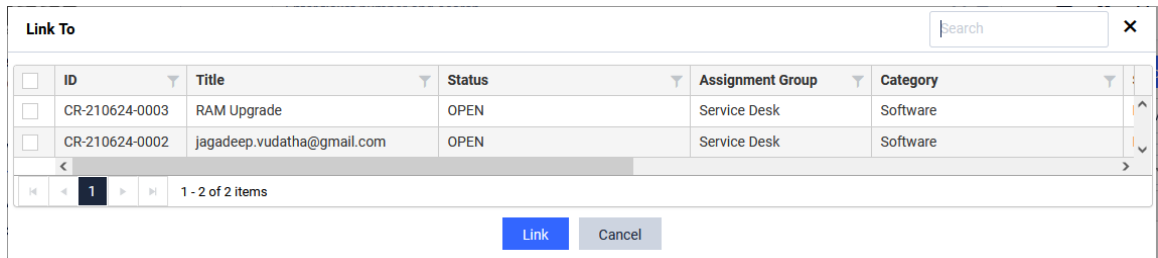
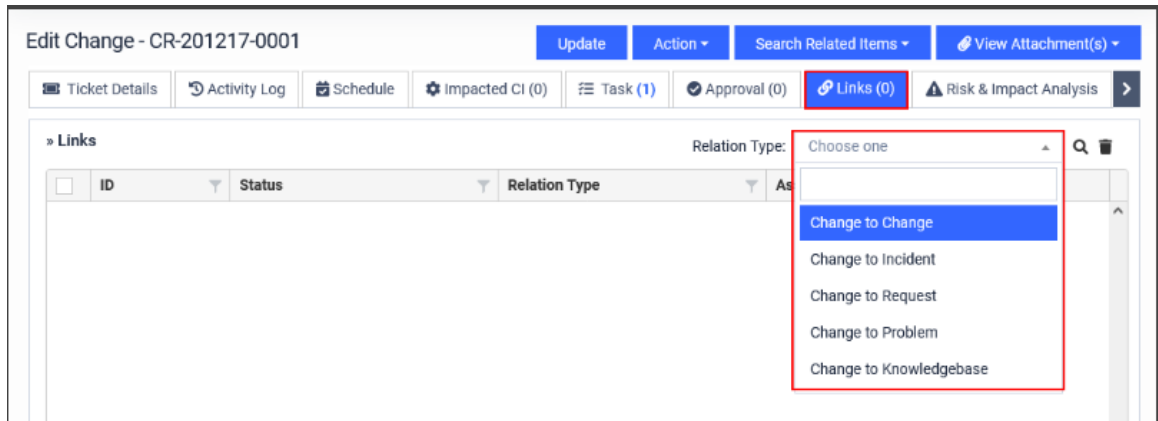
## LINKS


This tab allows agents to create relationships by linking Change to other tickets in system.

Options Available:

**Change to Change:** Change can be linked to other Change

1. Navigate to Change module
2. Open a relevant change ticket in edit mode
3. Move to **Links** tab and select Relation Type as **'Change to Change'**



4. Click on  icon, which will display all open changes in a pop-up box. Agent can select changes and attach to change.
5. Click on Link
6. Linked ticket will be visible on Links tab.

**Change to Request:** Change can be linked to Request ticket

1. Navigate to Change module
2. Open a relevant change ticket in edit mode
3. Move to **Links** tab and select Relation Type as **'Change to Request'**

Edit Change - CR-201217-0001

Update Action Search Related Items View Attachment(s)

Ticket Details Activity Log Schedule Impacted CI (0) Task (1) Approval (0) **Links (0)** Risk & Impact Analysis

» Links Relation Type: Choose one

- Change to Change
- Change to Incident
- Change to Request
- Change to Problem
- Change to Knowledgebase

ID	Status	Relation Type	As
----	--------	---------------	----


Link To

Search

ID	Title	Status	Assignment Group	Category
R-210623-0022	Request for Guest WiFi access	OPEN	Service Desk	SOFTWARE
R-210623-0021	Request for Guest WiFi access	OPEN	Service Desk	SOFTWARE
R-210623-0020	Request for VPN	OPEN	Service Desk	SOFTWARE
R-210623-0019	Request for VPN	OPEN	Service Desk	SOFTWARE
R-210623-0018	Request for VPN	OPEN	Service Desk	SOFTWARE
R-210623-0017	Request for Guest WiFi access	OPEN	Service Desk	SOFTWARE
R-210623-0016	Request for Guest WiFi access	OPEN	Service Desk	SOFTWARE
R-210623-0015	Request for Guest WiFi access	OPEN	Service Desk	SOFTWARE
R-210623-0014	Request for VPN	OPEN	Service Desk	SOFTWARE
R-210623-0013	Request for VPN	OPEN	Service Desk	SOFTWARE

1 - 10 of 709 items

Link Cancel

- Click on  icon, which will display all open requests in a pop-up box. Agent can select requests and attach to change.
- Click on Link
- Linked ticket will be visible on Links tab.

**Change to Incident:** Change can be linked to Incident ticket

- Navigate to Change module
- Open a relevant change ticket in edit mode
- Move to **Links** tab and select Relation Type as **'Change to Incident'**

Edit Change - CR-201217-0001

Update Action Search Related Items View Attachment(s)

Ticket Details Activity Log Schedule Impacted CI (0) Task (1) Approval (0) **Links (0)** Risk & Impact Analysis

» Links

Relation Type: Choose one

- Change to Change
- Change to Incident
- Change to Request
- Change to Problem
- Change to Knowledgebase

ID	Status	Relation Type	As


Link To

Search

ID	Title	Status	Assignment Group	Category
IN-210624-0014	Test Mail to check Email Notificatio...	OPEN	Service Desk	PHONE
IN-210624-0005	HARDWARE / LAPTOP / LENOVO- X...	OPEN	Service Desk	HARDWARE
IN-210624-0004	HARDWARE / LAPTOP / LENOVO- X...	OPEN	Service Desk	HARDWARE
IN-210623-0004	Test Mail to check Email Notificatio...	OPEN	Service Desk	PHONE
IN-210623-0003	web conference not connecting	OPEN	Server Support L2	SOFTWARE
IN-210622-0027	Server Printer not working	OPEN	Server Support	HARDWARE
IN-210622-0026	Application Slowness Issue, Applic...	OPEN	Server Support L2	SOFTWARE
IN-210622-0025	Test Mail to check Email Notificatio...	OPEN	Service Desk	PHONE
IN-210622-0024	Test Mail to check Email Notificatio...	OPEN	Service Desk	PHONE
IN-210622-0023	Test Mail to check Email Notificatio...	OPEN	Service Desk	PHONE

1 - 10 of 1293 items

Link Cancel

4. Click on  icon, which will display all open incidents in a pop-up box. Agent can select incidents and attach to change.
5. Click on Link
6. Linked ticket will be visible on Links tab.

**Change to Problem:** Change can be linked to Problem ticket

1. Navigate to Change module
2. Open a relevant change ticket in edit mode
3. Move to **Links** tab and select Relation Type as **'Change to Problem'**

Edit Change - CR-201217-0001

Update Action Search Related Items View Attachment(s)

Ticket Details Activity Log Schedule Impacted CI (0) Task (1) Approval (0) **Links (0)** Risk & Impact Analysis

» Links Relation Type: Choose one

- Change to Change
- Change to Incident
- Change to Request
- Change to Problem
- Change to Knowledgebase

ID	Status	Relation Type	As


Link To

Search

ID	Title	Status	Assignment Group	Category
PR-210624-0003	Application Slowness Issue	KNOWN ERROR	Service Desk	SOFTWARE
PR-210624-0002	Exchange Server Down	RESOLVED	Service Desk	SYSTEM
PR-200825-0001	Intermittent Network Issue	PROGRESSING	Service Desk	HARDWARE
PR-200709-0004	Unable to connect mail server	OPEN	Service Desk	IT SERVICES
PR-200709-0003	Unable to connect mail server	OPEN	Service Desk	IT SERVICES
PR-200511-0008	Intermittent network connection	OPEN	Service Desk	HARDWARE

1 - 6 of 6 Items

Link Cancel

4. Click on  icon, which will display all open problems in a pop-up box. Agent can select problems and attach to change.
5. Click on Link
6. Linked ticket will be visible on Links tab.

**Change to Knowledgebase:** Change can be linked to Knowledge Article

1. Navigate to Change module
2. Open a relevant change ticket in edit mode
3. Move to **Links** tab and select Relation Type as **'Change to Knowledgebase'**



Edit Change - CR-201217-0001

Update Action Search Related Items View Attachment(s)

Ticket Details Activity Log Schedule Impacted CI (0) Task (1) Approval (0) **Links (0)** Risk & Impact Analysis

» Links

Relation Type: Choose one

- Change to Change
- Change to Incident
- Change to Request
- Change to Problem
- Change to Knowledgebase

ID	Status	Relation Type	As

Link To

Search

ID	Title	Status	Assignment Group	Category
KB-210614-0001	Unable to Sign PDF	LIVE	Service Desk	SYSTEM
KB-200618-0001	Problem title Asrsh	LIVE	Application Support	IT SERVICES
KB-200617-0001	PROBLEM TITLE	LIVE	Application Support	IT SERVICES
KB-200616-0010	How to stop the client from installing	LIVE	Service Desk	SOFTWARE
KB-200616-0001	Printer/Scanning - HP Printer/Scan...	LIVE	Service Desk	HARDWARE

1 - 5 of 5 items

Link Cancel

4. Click on icon, which will display all articles in a pop-up box. Agent can select article and attach to change.
5. Click on Link
6. Linked article will be visible on Links tab.

**Detach Ticket:** The agent can detach a linked incident or any other ticket by selecting a ticket and clicking on the Delete button.

## APPROVALS

If a ticket requires formal approval before proceeding the case, Agent can create an approval manually by clicking on **Approval** → **Create New**.

Enter all \* marked following mandatory fields.

Edit Change - CR-201217-0001

Update Action Search Related Items View Attachment(s)

Ticket Details Activity Log Schedule Impacted CI (0) Task (1) **Approval (0)** Links (0) Risk & Impact Analysis

» Approval

Create New Detach Approval

Approval ID	Status	Comments	Sequence Of	Approval

### Create Approval

[Add Attachment](#) [Submit](#) ✕

Approval For:  Status:  Approval Group:  Approver:

Submitted Date:  Sequence Of:

Comments \*

Paragraph

[Submit](#) [Cancel](#)

### Edit Approval - AP-210624-0004

[Add Attachment](#) [View Attachment\(s\)](#) ✕

Approval For:  Status:  Approval Group:  Approver:

Submitted Date:  Sequence Of:

Approver Comments \*

Paragraph

Comments \*

Paragraph

[Approve](#) [Reject](#) [Update](#) [Cancel](#)

On submitting a request for approval, approver will receive an approval mail with a link to approve or reject the request.

All linked approvals will visible under Approval Tab. If the logged in user is a managerial user, then he can open the approval and click on **Approve** or **Reject**.

To detach any approval, click on '**Detach Approval**'.

### Edit Change - CR-201217-0001

[Update](#) [Action](#) [Search Related Items](#) [View Attachment\(s\)](#)

[Ticket Details](#) [Activity Log](#) [Schedule](#) [Impacted CI \(0\)](#) [Task \(1\)](#) [Approval \(0\)](#) [Links \(0\)](#) [Risk & Impact Analysis](#)

» Approval [Create New](#) [Detach Approval](#)

<input type="checkbox"/>	Approval ID	Status	Comments	Sequence Of	Approval

## IMPACTED CI

Related configuration items can be added under 'Impacted CI' tab.

**Add New**- Allows to create a new CI and link to Change.

**Link Existing CI**- On clicking link existing CI, displays all available CI and agent can select related CI and link to Change.

**Link To** X

CI Type \* Search Text

Desktop Search Search

<input type="checkbox"/>	ID	Name	Type	Vendor Name	Serial Number	Model No.	Client	Created By	Created On	Last
<input type="checkbox"/>	CI-200415-0001	CI Testing by Arsad	Desktop				Allied	Jagadeep Vudatha	04/16/2020 09:23:29	Jag
<input type="checkbox"/>	CI-200303-0001	test	Desktop				Allied	Deepak4 Shukla	03/04/2020 01:50:46	Dee
<input type="checkbox"/>	CI-200305-0002	test	Desktop				Allied	Deepak4 Shukla	03/05/2020 22:51:21	Dee
<input type="checkbox"/>	CI-200323-0002	test by sagar 2	Desktop				Allied	Jagadeep Vudatha	03/23/2020 11:35:34	Jag
<input type="checkbox"/>	CI-200317-0002	TEST #1211	Desktop				Allied	Jagadeep Vudatha	03/20/2020 12:02:23	Jag
<input type="checkbox"/>	CI-200323-0003	test by sagar 4	Desktop				Allied	Jagadeep Vudatha	03/23/2020 13:16:13	Jag
<input type="checkbox"/>	CI-200324-0002	TEST #5645	Desktop				Allied	Jagadeep Vudatha	03/24/2020 23:58:42	Jag
<input type="checkbox"/>	CI-200323-0004	test by sagar 2	Desktop				Allied	Jagadeep Vudatha	03/23/2020 13:19:42	Jag
<input type="checkbox"/>	CI-200323-0005	test by sagar 5	Desktop				Allied	Jagadeep Vudatha	03/23/2020 13:35:31	Jag
<input type="checkbox"/>	CI-200323-0006	test test	Desktop				Allied	Jagadeep Vudatha	03/23/2020 13:37:19	Jag

1 - 20 of 26 items

Link
Cancel

**Detach CI**- Linked CI can be detached by clicking on 'Detach CI'.

**Edit Change - CR-201217-0001** 
Update
Action
Search Related Items
View Attachment(s)

Ticket Details
Activity Log
Schedule
Impacted CI (0)
Task (1)
Approval (0)
Links (0)
Risk & Impact Analysis

Add New
Link Existing CI
Detach CI

<input type="checkbox"/>	ID	CI Name	Type	Serial No.	Model No.

### VIEW CI DETAILS FROM CHANGE PAGE

Displays CI details, related tickets, CI history and graphical view of CI relationship. If any specific CI is linked to other CI then relationship will be displayed in next level.

**Create Change** 
Common Changes
Add Attachment
Submit

Client Name \* Allied 
Change Initiator \* Priya Lewis
  
Location \* Mahape
  
Status \* OPEN

Category/Sub Category/Item \* 
Impact \* LOW
  
Urgency \* LOW

Priority \* P4 
Change Type \* Choose one
  
Assignment Group \* Choose one
  
Change Owner Choose one

Primary CI CI-210526-0011 
Opened By Jagadeep Vudatha
  
Opened Date 06/30/2021 14:32:19

**ADCP-CHFD2\_D (CI-210526-0011) Details** ✕

CI's Details
CI's Related Tickets (3)
CI's History
Relationship Graph

---

**Client Name \*** 
**Requestor Name \*** 
**Location \*** 
**Contact No.**

**CI Name \*** 
**CI Type \*** 
**Status \***

**Assignment Group \*** 
**Technician Name** 
**Alternate Contact** 
**Alternate Location**

**Created By** 
**Created On**

**Short Description**

**Additional Comments**  






B I

**ADCP-CHFD2\_D (CI-210526-0011) Details** ✕

CI's Details
CI's Related Tickets (3)
CI's History
Relationship Graph


ID	Status	Requestor Name	Assignment Group	Technician Name	Category	Sub Category	Item	Priority
<a href="#">IN-210625-0001</a>	OPEN	Priya Lewis	Network Support L2		HARDWARE	LAPTOP	LENOVO- X1 YOGA	P4
<a href="#">PR-210603-0001</a>	OPEN	Jagadeep Vudatha	Service Desk		SYSTEM	MONITORING	ALERT	P4
<a href="#">PR-210525-0001</a>	CLOSED	Deepak Shukla	Service Desk		SYSTEM	MONITORING	ALERT	P1

1 | 1 - 3 of 3 items

- 
**CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**  
 CI Name :- ABCABCUSESUPWEB04 (CI-210526-0040) is attached with this CI
- 
**CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**  
 CI Name :- ABCABCINESDFCMB00 (CI-210526-0041) is attached with this CI
- 
**CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**  
 CI Name :- Canon Pixma G3000 (CI-210606-0001) is attached with this CI
- 
**CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**  
 CI Name :- Desktop CI (CI-210610-0001) is attached with this CI
- 
**CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha**  
 CI Name :- DDCP-CHFD4 (CI-210610-0002) is attached with this CI

**ADCP-CHFD2\_D (CI-210526-0011) Details** ✕

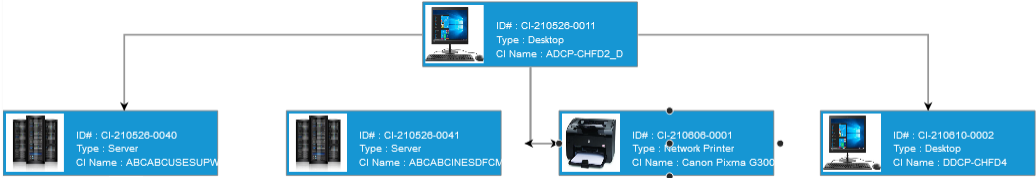
[CI's Details](#) | 
 [CI's Related Tickets \(3\)](#) | 
 [CI's History](#) | 
 [Relationship Graph](#)



ID# : CI-210526-0011  
Type : Desktop  
CI Name : ADCP-CHFD2\_D

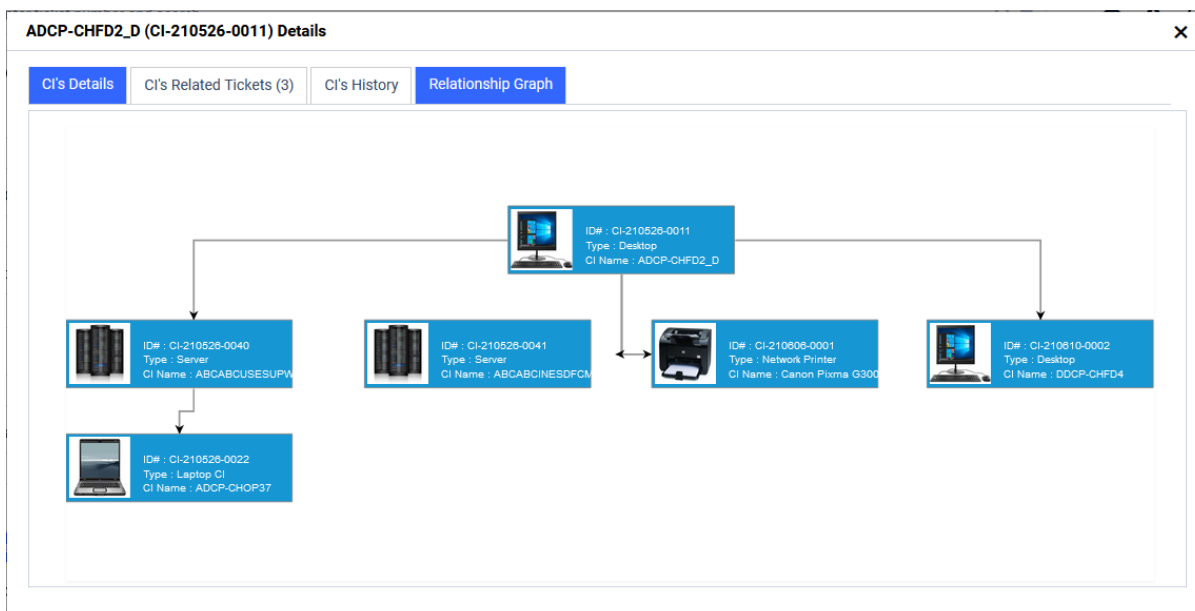
**ADCP-CHFD2\_D (CI-210526-0011) Details** ✕

[CI's Details](#) | 
 [CI's Related Tickets \(3\)](#) | 
 [CI's History](#) | 
 [Relationship Graph](#)



```

      graph TD
        A["ID# : CI-210526-0011  
Type : Desktop  
CI Name : ADCP-CHFD2_D"]
        B["ID# : CI-210526-0040  
Type : Server  
CI Name : ABCABCUSESUPW..."]
        C["ID# : CI-210526-0041  
Type : Server  
CI Name : ABCABCINESDFCM..."]
        D["ID# : CI-210606-0001  
Type : Network Printer  
CI Name : Canon Pixma G3000"]
        E["ID# : CI-210610-0002  
Type : Desktop  
CI Name : DDCP-CHFD4"]
        
        A --- B
        A --- C
        A --- D
        A --- E
    
```



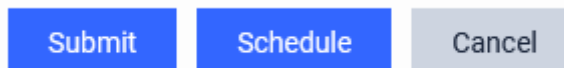
## CHANGE TICKET CLOSURE

Upon selecting **closed** status from status drop down, enter the closure comments and actual activity start and end date/time in schedule tab.

## SCHEDULED CHANGES

Scheduled ticket functionality benefits when there are some activities need to be executed at regular intervals. Once a ticket is scheduled, new ticket will be created and assigned to the specified support group automatically at the scheduled interval.

1. Navigate to Change Module and click on 'Create New'
2. Fill all \* marked mandatory fields and click on 'Schedule'.



3. Displays scheduled dialog box, Select Scheduler Type, Schedule from Date & Time
4. Click on **Submit**

## Task Module

**Task** is used when a particular ticket require other assignment groups in tool to get involve in order to resolve the one particular **ticket**.

Task ticket can be created via task module or via particular ticket.

### Create Task ticket via incident



Agent can create a new Task and link to incident or open any existing tasks and can link to incident.

1. Navigate to incident module from left menu bar
2. Open a required incident in edit mode
3. Click on **Task** → **Create New** to create a new Task.
4. Fill the all mandatory information
5. Details like client name, requestor name, task description, additional comments will be pre-populated from incident.
6. Click on Submit.
7. Created task will be linked to the incident.

Task ID	Approval ID	Task Name	Requestor Name	Assignment Group	Status	Sequence
T-210617-0003		Check Network Status	Jagadeep Vudatha	Network Support	OPEN	2

### Create Task ticket via task module

1. In shortcut bar, go to **Task Module** → Click on '**Create New**'
2. Displays a new task creation page
3. Enter all \* marked following mandatory fields.

- a. **Client Name**- This is a mandatory field and data is auto populated with client information.
- b. **Requestor Name**- Mandatory field. Select contact details of user who has reported issue. If contact is not present in the application, then new contact can be created by using **add contact** feature. You can use search button to find the existing contact
- c. **Task Name**- Enter relevant Task name in given text field.
- d. **Linked To** – This field will be grayed out when task is directly created from task module.
- e. **Status**- Mandatory field. There are different status available throughout the life cycle of task. Initially all ticket will be set to ‘OPEN’ Status.
- f. **Assignment Group**- Mandatory field. Select appropriate support group to work on task.
- g. **Technician Name**- Assign ticket to individual. Depend on selected assignment group, technician names will be appear on the drop down list.
- h. **Due date** – Enter the date by when you are targeting to close the task.
- i. **Sequence**- Enter the task sequence number
- j. **Opened Date**: System auto captures date and time when task is created.
- k. **Opened By**: System auto captures name of the agent/ end user who has created the task.
- l. **Task Description**: Provide a relevant title to the task that will exactly summarize the task.
- m. **Additional Comments**: Provide a detailed description with any other associated details relevant to the task.

The screenshot shows the 'Create Task' interface in AdiTaaS. On the left is a navigation sidebar with options like 'Change', 'Release', 'Task', 'Interaction', 'CMDB', 'ChatBot', 'Live Chat', 'Integration Hub', 'Visual Boards', 'Reporting', and 'Administration'. The main area contains the 'Create Task' form with the following fields and values:

- Client Name \***: Allied
- Requestor Name \***: Choose one
- Task Name \***: (empty)
- Status \***: OPEN
- Assignment Group \***: Choose one
- Technician Name**: Choose one
- Opened Date**: 06/22/2021 05:39:05
- Due Date**: month/day/year hours:mi...
- Sequence \***: (empty)
- Task Description \***: (empty text area)
- Additional Comments \***: (empty rich text editor)

Buttons at the top right include 'Add Attachment' and 'Submit'. Buttons at the bottom include 'Submit', 'Schedule', and 'Cancel'.

4. Once all the required mandatory are filled and click on **Submit** button.
5. Click on Add attachment button to add attachment during the ticket creation

- New task will be created with **unique task ID** and an email notification is sent to confirm that the ticket has been logged.

### EDIT/ UPDATE TASK

On successful creation of ticket, system will generate unique ticket id. Ticket id starts with date and number. **T** indicates task ticket.

Agent can perform more actions on edit task screen, where agent can modify the information in the screen and click on Update button to save the changes.

## ADD NOTES

To add any additional information or work logs to ticket, click on **Action** → **Add Notes**

The screenshot displays the 'Edit Task' page for ticket T-210620-0005. The main form contains the following fields:

- Client Name:** Allied
- Requester Name:** Priya Lewis
- Task Name:** Check Application Status
- Status:** OPEN
- Assignment Group:** Service Desk
- Technician Name:** Choose one
- Opened By:** Jagadeep Vudatha
- Opened Date:** 06/20/2021 17:15:18
- Due Date:** month/day/year hours:minutes:sec...
- Sequence:** 1
- Task Description:** Check Application Status

On the right side, the 'Action' dropdown menu is open, and the 'Add Notes' option is highlighted with a red box. Other visible options in the menu include 'Add Attachment', 'Send Email', 'Set Reminder', 'Print', 'Copy as New', 'New Article', 'New Task', 'New Problem', 'New Incident', 'New Request', and 'New Change'.

Add Notes dialog box will open

Click on checkbox to select required action items available on notes window

- Internal Notes:** Notes will be visible only agents. By default added notes will be visible for both agents and end users.
- Email this note to technician:** Email notification will be sent to assigned technician with added notes.
- Email this note to support group:** Email notification will be sent to all members of ticket assigned group with notes.
- Email this note to requestor:** Email notification will be sent to requestor with added notes.
- Watch list:** This functionality enables technician to add any email id to keep posted with ticket updates. Once email id is added to watch list, all noticeable members will receive notification on any status change, on notes added and on resolution of the ticket.

**Add Notes**
✕

Internal Notes  
 Email this note to Support Group

Email this note to Requestor  
 Email this note to Technician

Watch List Email Id

▼

**Notes \***

Paragraph ▼
**B**
*I*
🔗
☰
☰
☰
☰
🖼️
🗨️
📅
📺
↶
↷

Add Notes
Cancel

Enter the required comments/images/screenshots in the Notes section and click on Add Notes. Added information will be visible in Activity Log.

**ADD ATTACHMENT:**

1. To add an attachment to a ticket, click on **Action → Add Attachment**.
2. On clicking will open up a new window.
3. From the file chooser window, click on Browse to choose the file to be attached
4. Click open to upload the attachment.

Enter ticket number and search...
🔍
🏠
🔔
👤
⚙️

**Edit Task - T-210620-0005**
Update
Action ▼

Task Details
Activity Log
Schedules (0)

**Client Name \***  
Allied

**Status \***  
OPEN

**Opened By**  
Jagadeep Vudatha

**Task Description \***  
Check Application Status

**Requestor Name \***  
Priya Lewis

**Assignment Group \***  
Service Desk

**Opened Date**  
06/20/2021 17:15:18

**Task Name**  
Check Application Status

**Technician Name**  
Choose one

**Due Date**  
month/day/year hours:minutes:sec...


**Linked To**

**Field Service**  
Schedule Call

**Sequence \***  
1

- Add Notes
- Add Attachment
- Send Email
- Set Reminder
- Print
- Copy as New
- New Article
- New Task
- New Problem
- New Incident
- New Request
- New Change

**Add Attachment**
✕



No file selected.

Or Drag It Here.

	File Name	Attached By	Attached On
<input type="checkbox"/>	New Text Document.txt	Jagadeep Vudatha	06/20/2021 20:10:58

All Uploaded attachments will be visible Under **'View Attachment(s)'** tab.

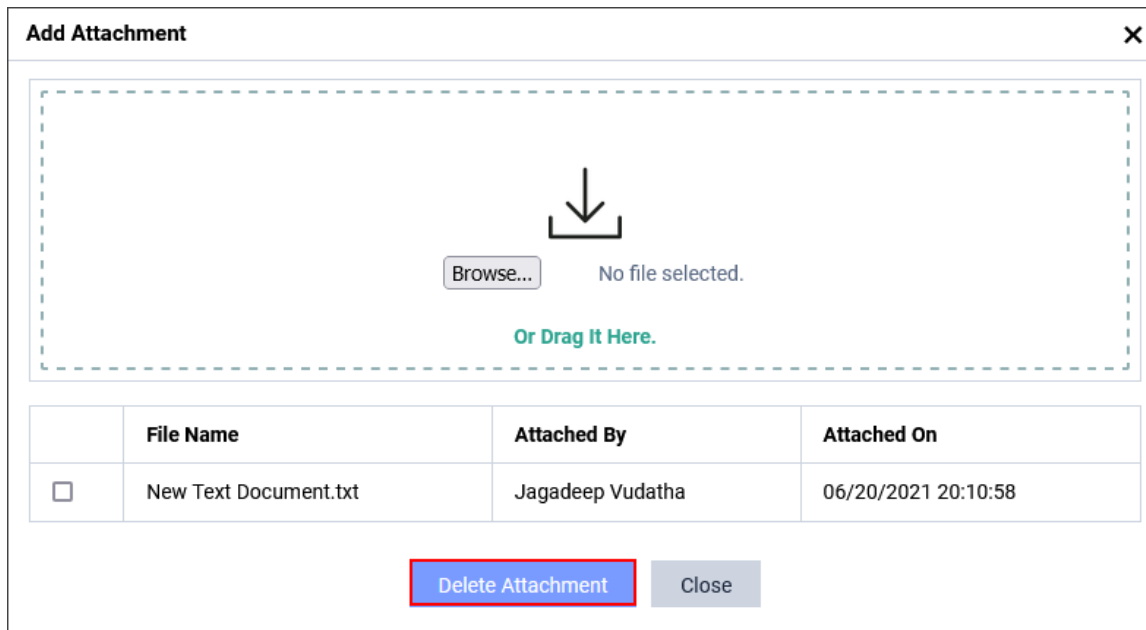
Edit Task - T-210620-0005

New Text Document.txt ✕

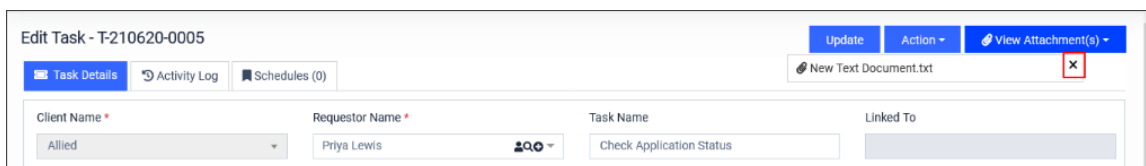
Client Name *	Requestor Name *	Task Name	Linked To
<input type="text" value="Allied"/>	<input type="text" value="Priya Lewis"/>	<input type="text" value="Check Application Status"/>	<input type="text"/>

**DELETE/ REMOVE ATTACHMENT:**

To remove an attachment, click on respective attached attachment by clicking on checkbox and click on **'Delete Attachment'**.

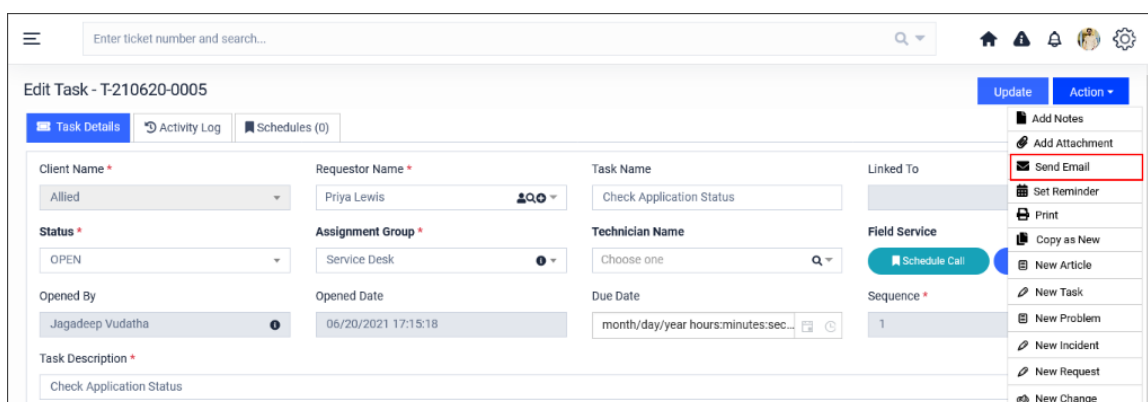


To quick delete an attachment , click on **'View Attachment(s)'** tab and go to respective attachment click on **'x'** placed next to it.



**SEND MAIL:**

1. To send an email from ticket, click on **Action → Send Email.**



2. Compose email, user email id and ticket id will be auto populated in **'To'** and **'Subject'** fields respectively. Attach any files by clicking on Browse.

When complete, click on 'Send Email'. All actions are captured in Activity Log.

## SET REMINDER

Set reminder functionality allows agents to set a reminder to alert on some important tasks/events like contacting end user at specific given time or follow up on any task. It allow to put a date/time and option to select whomever you want to remind.

1. To a set reminder, click on **Action** → **Set Reminder**.

2. Set reminder dialog box is displayed. Enter the **Subject** and **Comments** in box.
3. Select checkbox, if required to send an email notification regarding the notification.
4. In select applicable option from 'To Whom' drop down list.



- a. **Remind me** – Reminder will be set for logged in agent.
  - b. **Support Group Members**- Reminder will be set for selected support group.
  - c. **Some else** – Provides option to set a reminder to specific person.
5. **Remind Time** –Select date/time to set a reminder.

**Set Reminder** ✕

Subject \*

Comments \*

Send Email

To Whom \* Remind Time\*

Submit
Cancel

### SHOW REMINDERS

All scheduled reminders will be visible under **Action → Show Reminders** as well as on **Calendar view**.

**Show Reminders** ✕

	Notes	Subject	Scheduled Date & Time	Follow Up Type	Set By
<input type="checkbox"/>	Contact user at 10 AM today	Contact user at 10 AM today	06/21/2021 10:00:00	Support Group Members	Jagadeep Vudatha

Deactivate Reminder
Cancel

### Deactivate the Reminder

Scheduled reminder can be deactivated with simple following steps.

1. Go to **Action→Show Reminders**
2. Select reminder by clicking on checkbox and click on **Deactivate Reminder**
3. Reminder Status will be marked as deactivated.

Show Reminders					
<input type="checkbox"/>	Notes	Subject	Scheduled Date & Time	Follow Up Type	Set By
<input type="checkbox"/>	Contact user at 10 AM today	Contact user at 10 AM today	06/21/2021 10:00:00	Support Group Members	Jagadeep Vudatha

1 - 1 of 1 items

[Deactivate Reminder](#) [Cancel](#)

## PRINT TASK

If you want to print a task ticket, open required task need to be print,

1. Go to **Action** menu → Click on **Print**
2. Tool will display a print preview option. Print will display ticket details, activity log along with resolution details.
3. Click on **Print**

Enter ticket number and search...

**Edit Task - T-210620-0005** [Update](#) [Action](#)

**Task Details** | [Activity Log](#) | [Schedules \(0\)](#)

<b>Client Name *</b> Allied	<b>Requestor Name *</b> Priya Lewis	<b>Task Name</b> Check Application Status	<b>Linked To</b>
<b>Status *</b> OPEN	<b>Assignment Group *</b> Service Desk	<b>Technician Name</b> Choose one	<b>Field Service</b> <a href="#">Schedule Call</a>
<b>Opened By</b> Jagadeep Vudatha	<b>Opened Date</b> 06/20/2021 17:15:18	<b>Due Date</b> month/day/year hours:minutes:sec...	<b>Sequence *</b> 1
<b>Task Description *</b> Check Application Status			

- Add Notes
- Add Attachment
- Send Email
- Set Reminder
- Print**
- Copy as New
- New Article
- New Task
- New Problem
- New Incident
- New Request
- New Change

Print Cancel

Task Details			
Number :	T-210620-0005	Client Name :	Allied
Task Name :	Check Application Status	Linked To :	
Opened By :	Jagadeep Vudatha	Opened Date :	06/20/2021 17:15:18
Requestor Id :	priya.lewis	Requestor Name :	Priya Lewis
Mobile :	9876567898	Email :	priya.lewis@allieddigital.net
Status :	OPEN	Due Date :	
Assignment Group :	Service Desk	Technician Name :	
Sequence :	1		
Task Description :	Check Application Status		
Additional Comments :	Check Application Status		

Activity Log :
<b>Attachment removed On 06/22/2021 05:41:33 by user = Jagadeep Vudatha</b>
Attachment Name:- New Text Document.txt, Removed by user = Jagadeep Vudatha
<b>Attachment added on 06/22/2021 05:41:14 by user = Jagadeep Vudatha</b>
Attachment Name:- New Text Document.txt, Added by user = Jagadeep Vudatha

### COPY AS NEW

Copy as new copies the details of an existing task record to a new task record. Instead of re-entering all the information for new requestor.

1. Click on **Action** → **Copy as New**
2. Copy As New dialog box will open to enter the **Requestor Name**

Enter ticket number and search...

**Edit Task - T-210620-0005** [Update] [Action]

Task Details | Activity Log | Schedules (0)

Client Name \* Allied | Requestor Name \* Priya Lewis | Task Name Check Application Status | Linked To

Status \* OPEN | Assignment Group \* Service Desk | Technician Name Choose one | Field Service [Schedule Call]

Opened By Jagadeep Vudatha | Opened Date 06/20/2021 17:15:18 | Due Date month/day/year hours:minutes:sec... | Sequence \* 1

Task Description \* Check Application Status

- Add Notes
- Add Attachment
- Send Email
- Set Reminder
- Print
- Copy as New**
- New Article
- New Task
- New Problem
- New Incident
- New Request
- New Change

**Copy As New** [X]

Requestor Name \*

jil

Jignesh Sodvadiya  
Jignesh.Sodvadiya | Mahape  
Jignesh.Sodvadiya@allieddigital.net

**Copy As New** [X]

Requestor Name \*

Jignesh Sodvadiya

[Create] [Cancel]

3. Search and select required **Requestor Name** and Click **Create**.

### QUICK LINKS TO CREATE TICKETS FROM TASK

Following links helps to create other module tickets from task ticket.

Enter ticket number and search...

**Edit Task - T-210620-0005** [Update] [Action]

Task Details | Activity Log | Schedules (0)

Client Name \* Allied | Requestor Name \* Priya Lewis | Task Name Check Application Status | Linked To

Status \* OPEN | Assignment Group \* Service Desk | Technician Name Choose one | Field Service [Schedule Call]

Opened By Jagadeep Vudatha | Opened Date 06/20/2021 17:15:18 | Due Date month/day/year hours:minutes:sec... | Sequence \* 1

Task Description \* Check Application Status

- Add Notes
- Add Attachment
- Send Email
- Set Reminder
- Print
- Copy as New**
- New Article
- New Task
- New Problem
- New Incident
- New Request
- New Change

## New Article

Allows to raise an article from task ticket.

- Go to **Action** → **New Article**
- Enter the new article details and click on submit

**Create Knowledge Article**



✕

<p><b>Client Name *</b></p> <div style="border: 1px solid #ccc; padding: 2px;">Allied</div>	<p><b>Status *</b></p> <div style="border: 1px solid #ccc; padding: 2px;">DRAFT</div>
<p><b>Category/Sub Category/Item *</b></p> <div style="border: 1px solid #ccc; height: 20px;"></div>	<p><b>Problem Title *</b></p> <div style="border: 1px solid #ccc; height: 20px;"></div>

**Problem Description \***

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<b>Assignment Group *</b>	<b>Technician Name</b>	<b>Source *</b>	<b>Type *</b>
<div style="border: 1px solid #ccc; padding: 2px;">Choose one</div>	<div style="border: 1px solid #ccc; padding: 2px;">Choose one</div>	<div style="border: 1px solid #ccc; padding: 2px;">Choose one</div>	<div style="border: 1px solid #ccc; padding: 2px;">Choose one</div>
<b>Available For *</b>	<b>Configuration Item</b>	<b>Tags</b>	
<div style="border: 1px solid #ccc; padding: 2px;">Choose one</div>	<div style="border: 1px solid #ccc; padding: 2px;">CI-210526-0041</div>	<div style="border: 1px solid #ccc; height: 20px;"></div>	

**Additional Link**

<b>Opened By</b>	<b>Opened Date</b>
<div style="border: 1px solid #ccc; padding: 2px;">Jagadeep Vudatha</div>	<div style="border: 1px solid #ccc; padding: 2px;">06/24/2021 13:03:58</div>

**Article Image**

↓

No file selected.

Or Drag It Here.

**Solution \***

Paragraph
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## New Task

Allows to raise a new task ticket from task ticket.

- Go to **Action** → **New Task**

- Enter the new task details and click on submit

**Create Task**

Add Attachment
Submit
✕

<b>Client Name *</b> <input type="text" value="Allied"/>	<b>Requestor Name *</b> <input type="text" value="Jignesh Sodvadiya"/> <span style="font-size: 0.8em;">👤🔍</span>	<b>Task Name *</b> <input type="text"/>	<b>Linked To</b> <input type="text" value="IN-210624-0013"/>
<b>Status *</b> <input type="text" value="OPEN"/>	<b>Assignment Group *</b> <input type="text" value="Choose one"/> <span style="font-size: 0.8em;">ℹ️</span>	<b>Technician Name</b> <input type="text" value="Choose one"/>	<b>Opened By</b> <input type="text" value="Jagadeep Vudatha"/> <span style="font-size: 0.8em;">ℹ️</span>
<b>Opened Date</b> <input type="text" value="06/24/2021 13:08:44"/>	<b>Due Date</b> <input type="text" value="month/day/year hours: minu..."/> <span style="font-size: 0.8em;">📅🕒</span>	<b>Sequence *</b> <input type="text" value="1"/>	

**Task Description \***

**Additional Comments \***

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Application Name - [Enter the application name]

Number of Users Impacted - [Enter the number]

Submit
Cancel

### New Problem

Allows to raise a new problem ticket from task ticket.

- Go to **Action** → **New Problem**
- Enter the new problem details and click on submit

**Create Problem**

Add Attachment
Submit
✕

<b>Client Name *</b> <input type="text" value="Allied"/>	<b>Requestor Name *</b> <input type="text" value="Jignesh Sodvadiya"/> <span style="font-size: 0.8em;">👤🔍</span>	<b>Location</b> <input type="text" value="Mahape"/>	<b>Contact No.</b> <input type="text" value="0802567677"/>
<b>Preferred Contact</b> <input type="text" value="Primary"/>	<b>Status *</b> <input type="text" value="OPEN"/>	<b>Category/Sub Category/Item *</b> <input type="text"/>	
<b>Impact *</b> <input type="text" value="LOW"/>	<b>Urgency *</b> <input type="text" value="LOW"/>	<b>Priority *</b> <input type="text" value="P4"/> <span style="font-size: 0.8em;">ℹ️</span>	<b>Assignment Group *</b> <input type="text" value="Choose one"/> <span style="font-size: 0.8em;">ℹ️</span>
<b>Technician Name</b> <input type="text" value="Choose one"/>	<b>Configuration Item</b> <input type="text" value="CI-210526-0041"/> <span style="font-size: 0.8em;">🔍👤</span>	<b>Channel *</b> <input type="text" value="Choose one"/>	<b>Opened By</b> <input type="text" value="Jagadeep Vudatha"/> <span style="font-size: 0.8em;">ℹ️</span>
<b>Opened Date</b> <input type="text" value="06/24/2021 13:09:56"/>	<b>Alternate Contact</b> <input type="text"/>	<b>Alternate Location</b> <input type="text"/> <span style="font-size: 0.8em;">🔍</span>	<b>Vendor Ticket Number</b> <input type="text"/>
<b>RCA Date Identified</b> <input type="text" value="month/day/year hours: minu..."/> <span style="font-size: 0.8em;">📅🕒</span>	<b>Notification Mode</b> <input type="text"/>	<b>Is Major *</b> <input type="radio" value="No"/>	<b>Problem Manager</b> <input type="text" value="Choose one"/>

Submit
Cancel

### New Change

Allows to raise a new change ticket from task ticket.

- Go to **Action** → **New Change**
- Enter the new change details and click on submit

Create Change

Add Attachment
Submit
✕

<b>Client Name *</b> Allied	<b>Change Initiator *</b> Jignesh Sodvadiya	<b>Location *</b> Mahape	<b>Status *</b> OPEN
<b>Category/Sub Category/Item *</b>	<b>Impact *</b> LOW	<b>Urgency *</b> LOW	
<b>Priority *</b> P4	<b>Change Type *</b> Choose one	<b>Assignment Group *</b> Choose one	<b>Change Owner</b> Choose one
<b>Primary CI</b> CI-210526-0041	<b>Opened By</b> Jagadeep Vudatha	<b>Opened Date</b> 06/24/2021 13:12:48	
<b>Short Description *</b> Application Slowness Issue			
<b>Change Description *</b>			

Submit
Cancel

### New Request

Allows to raise a new request ticket from task ticket.

- Go to **Action** → **New Request**
- Enter the new request details and click on submit

Create Request

Add Attachment
Submit
✕

<b>Client Name *</b> Allied	<b>Requestor Name *</b> Jignesh Sodvadiya	<b>Location</b> Mahape	<b>Contact No.</b> 0802567677
<b>Category/Sub Category/Item *</b>	<b>Status *</b> Choose one	<b>Impact *</b> LOW	
<b>Urgency *</b> Choose one	<b>Priority *</b> Choose one	<b>Channel *</b> Choose one	<b>Assignment Group *</b> Choose one
<b>Technician Name</b> Choose one	<b>Configuration Item</b> CI-210526-0041	<b>Alternate Contact</b>	<b>Alternate Location</b>
<b>Vendor Ticket Number</b>	<b>Opened By</b> Jagadeep Vudatha	<b>Opened Date</b> 06/24/2021 13:16:41	
<b>Short Description *</b> Application Slowness Issue			

Submit
Cancel

### New Incident

Allows to raise a new request ticket from task ticket.

- Go to **Action** → **New Incident**
- Enter the new incident details and click on submit

**Create New Incident** Common Incidents Add Attachment Submit Search Related Items

Client Name \*  Requestor Name \*  Location  Contact No.

Category/Sub Category/Item \*  Status \*  Preferred Contact

Notification Mode  Impact \*  Urgency \*  Priority \*

Channel \*  Assignment Group \*  Technician Name  Configuration Item

Alternate Contact  Alternate Location

Flags

NEFCR Description  Vendor Ticket Number  Email Response  Opened By

## TASK ACTIVITY LOG

**Activity log** captures all actions performed on ticket from task creation to closure with date/time stamp along with agent id. All modification performed on ticket is auto captured. From the creation of ticket to resolution all activities are captured with order. All activities like add notes, add attachment, setting a reminder are capture in activity log with sequence.

**Edit Task - T-210625-0012** Update Action

Task Details **Activity Log** Schedules (0)

» Detailed Activity Log Activity Type: All

**Email Sent On 06/25/2021 12:43:54 by user = SYSTEM.ADMIN**

**From** :- aditaasusdemo@allieddigital.net  
**To** :- jvudatha@allieddigital.net, davidtcrabill@allieddigital.net, system.admin@mail.com, priya.lewis@allieddigital.net  
**Subject** :- Ticket [ T-210625-0012 ] has been assigned to Service Desk, Status OPEN  
**Event Name** :- Business Rule Manager

**Email Sent On 06/25/2021 12:43:54 by user = SYSTEM.ADMIN**

**From** :- aditaasusdemo@allieddigital.net  
**To** :- jvudatha@allieddigital.net  
**Subject** :- Ticket [ T-210625-0012 ] has been created  
**Event Name** :- Business Rule Manager

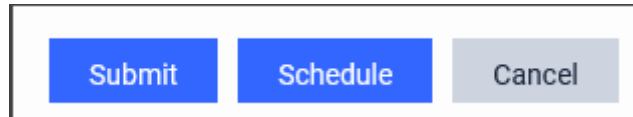
**Note:** Logs in the tool protected from alteration after-the-fact.



## SCHEDULED TASKS

**Create Scheduled Task** - Scheduled ticket functionality benefits when there are some activities need to be executed at regular intervals. Once a ticket is scheduled, new ticket will be created and assigned to the specified support group automatically at the scheduled interval.

1. Navigate to **Task Module** and click on **'Create New'**
2. Fill all \* marked mandatory fields and click on **'Schedule'** instead of clicking on submit.



3. Displays scheduled dialog box, Select Scheduler Type, Schedule from Date & Time
4. Click on **Submit**

**Schedule** ✕

Once  
  Daily  
  Weekly  
  Monthly

Schedule On Days \*

Sunday  
  Monday  
  Tuesday  
  Wednesday  
 Thursday  
  Friday  
  Saturday

Schedule from Date & Time \*

06/21/2021 06:52:39

**Deactivate Scheduled Task** - Scheduled ticket can be mark as inactive by unchecking the Is Active checkbox.

1. Navigate to **Task Module** and click on **'Scheduled Tasks'**
2. Click on respective scheduled ticket and uncheck **Is Active** checkbox
3. Click on **Update**

Scheduled Id	Scheduled Type	Status	Scheduled Date & Time	Scheduled Details	Title	Requestor Name	Act
SCH-200825-0005	Once	Active	08/25/2020 14:56:41		Task test by Arshad	David Cantrell	Se ^
SCH-200312-0001	Weekly	Active	03/12/2020 11:18:11	Monday	Test task by Ravi	Stephanie Llanes	Se
SCH-200311-0021	Once	Active	03/11/2020 15:40:00		jhhjv	Jagadeep Vudatha	Se v

## Configuration Management Database (CMDB)

A configuration management database (CMDB) is a database used by an organization to store information about hardware and software assets. A **CMDB** is a repository that acts as a data warehouse – storing information about your IT environment, the components that are used to deliver IT service.

**CI** stands for Configuration Item. CIs can be used to tie tickets to the services they pertain to. Incidents/Problems/Tasks have fields that allow you to choose the affected **CI**.

Configuration Item (CI) can be created from multiple places. CI can either create directly from tool using **Create New** Option. Tool facilitates to **integrate** it with 3<sup>rd</sup> party system and pull and store CI data in CMDB.

CI can also create from any edit ticket page using action **Impacted CI → Add New**. Added CI will be linked to the ticket.

### CREATE NEW CI FROM CMDB

1. In shortcut bar, go to **CMDB** Module → Click on '**Create New**'
2. Displays a new CI creation page
3. Enter all \* marked following mandatory fields.
  - a. **Client Name**- This is a mandatory field and data is auto populated with client information.
  - b. **Requestor Name**- Mandatory field. Select contact details of user who has reported issue. If contact is not present in the application, then new contact can be created by using **add contact** feature. You can use search button to find the existing contact.
  - c. **Location**- Auto populates user location from system.

- d. **Contact No**- Auto populates user contact number from system.
- e. **CI Name**- Mandatory field .Enter a relevant name in given text field.
- f. **CI Type**- Select required CI type from the drop down list.

The image shows a screenshot of a web form field labeled 'CI Type \*'. The field is a dropdown menu with a red border. The current selection is 'Desktop', which is highlighted in blue. Other visible options in the list include 'Choose one', 'PC', 'Laptop CI', 'Tablet', 'Citrix Thin Clients', 'Infrastructure', and 'Server'. The dropdown menu is open, showing the list of options.

- g. **Status**- Mandatory field. There are different status available throughout the life cycle of CI. Initially all ticket will be in 'OPEN' Status.
  - h. **Assignment Group**- Mandatory field. Select appropriate support group to work on CI ticket.
  - i. **Technician Name**- Assign ticket to individual. Depend on selected assignment group, technician names will be appear on the drop down list.
  - j. **Alternate Location**: Optional field. Provides an option to enter alternate location.
  - k. **Alternate Contact**: Optional field. Provides an option to enter alternate contact.
  - l. **Short Description**: Provide a relevant title to the CI ticket.
  - m. **Additional Comments**: Provide a detailed description with any other associated details relevant to the CI.
  - n. **Common Attributes**- Fill details for all CI Common attributes
  - o. **CI Custom Attributes**- Custom attributes will vary depend on selected CI Type.
4. Once all the required mandatory are filled and click on **Submit** button.
  5. Click on Add attachment button to add attachment during the ticket creation
  6. New CI will be created with **unique ID**.



Edit CI - CI-210610-0002
Update Action

CI Details
Activity Log
Task (0)
Approval (0)
Related Tickets (6)
Relationship (0)
Installed Software (0)

Client Name *	Requestor Name *	Location *	Contact No.
Allied	SYSTEM.ADMIN	Mahape	
CI Name *	DDCP-CHFD4	CI Type *	Status *
Assignment Group *	Service Desk	Desktop	OPEN
Technician Name	Choose one	Alternate Contact	Alternate Location
Created By	Created On		
	06/10/2021 11:42:56		

Short Description

Additional Comments

Paragraph

---

CI Common Attribute(s)

CI Purpose	CI Baselining Date	Last Audited Date *
	Select value	06/09/2021
Serial Number *	Assets Number	Manufacturer
A92928	E34546	Choose one
Principal Supplier	Purchase Order No.	Purchase Date
	PO91818	Select value
Support Start Date	Support End Date	Support Vendor
Select value	Select value	Choose one
Maintenance Cost	Configuration Diary	Cost
Leased	Lease start date	Lease end date
<input type="checkbox"/>	Select value	Select value

CI Custom Attribute(s)

CPU Type	CPU Speed	IP Address	Number of HDD
2.0		192.168.1.2	
Total HDD Space	CD/DVD Drive	Floppy Drive	Operating System
192.168.1.2			
Software Installed	Patches Installed	OS Service Pack Ver	

Update Cancel

### VIEW/ EDIT CI


1. All CI are classified under CI Type. Under CMDB all CI are displayed in tree view.
2. Upon selecting the CI Type all CI related to respective CI Type will be displayed in data grid.
3. Click on CI to view all information regarding the CI.







PC ▾

- Desktop (16)
- Laptop CI (11)
- Tablet (0)
- Citrix Thin Clients (0)















Database ▾

Software

 **Jagadeep Vudatha**  
Practice Manager

-  Problem ▾
-  Change ▾
-  Release ▾
-  Task ▾
-  Interaction ▾
-  CMDB ▾
  - Dashboard create in CMDB
  - Create New
  - PC ▾
    - Infrastructure ▾
    - Peripherals ▾
    - Operating System ▾
    - Telephony ▾
    - Applications ▾
    - Database ▾
    - Software

### Asset CI's List (Desktop)

<input type="checkbox"/>		<a href="#">Id Number</a> ▾	<a href="#">CI Name</a> ▾	<a href="#">Short Description</a> ▾
<input type="checkbox"/>		<a href="#">CI-210610-0002</a>	DACP-CHFD4	
<input type="checkbox"/>		<a href="#">CI-210610-0001</a>	Desktop CI	DELL
<input type="checkbox"/>		<a href="#">CI-210526-0011</a>	ADCP-CHFD2_D	ADCP-CHFD2
<input type="checkbox"/>		<a href="#">CI-210526-0010</a>	ADCP-FOFD2	ADCP-FOFD2
<input type="checkbox"/>		<a href="#">CI-210526-0009</a>	ADCP-CHFD4	ADCP-CHFD4
<input type="checkbox"/>		<a href="#">CI-210526-0008</a>	ADCP-FODOC1	ADCP-FODOC1
<input type="checkbox"/>		<a href="#">CI-210526-0007</a>	ADCP-CHOP1	ADCP-CHOP1
<input type="checkbox"/>		<a href="#">CI-210526-0006</a>	ADCP-CHOP3	ADCP-CHOP3
<input type="checkbox"/>		<a href="#">CI-210526-0005</a>	ADCP-CHOP4	ADCP-CHOP4
<input type="checkbox"/>		<a href="#">CI-210526-0004</a>	ADCP-CHOP6	ADCP-CHOP6
<input type="checkbox"/>		<a href="#">CI-210526-0003</a>	ADCP-CHPAN	ADCP-CHPAN
<input type="checkbox"/>		<a href="#">CI-210526-0002</a>	ADCP-FOPAN	ADCP-FOPAN
<input type="checkbox"/>		<a href="#">CI-210526-0001</a>	ADCP-CHPAN1	ADCP-CHPAN1
<input type="checkbox"/>		<a href="#">CI-201119-0003</a>	SC08809	

1 - 16 of 16 items

Edit CI - CI-210610-0002
Update Action

CI Details | Activity Log | Task (0) | Approval (0) | Related Tickets (6) | Relationship (0) | Installed Software (0)

Client Name *	Requestor Name *	Location *	Contact No.
Allied	SYSTEM.ADMIN	Mahape	
CI Name *		CI Type *	Status *
DDCP-CHFD4		Desktop	OPEN
Assignment Group *	Technician Name	Alternate Contact	Alternate Location
Service Desk	Choose one		Choose one
Created By	Created On		
	06/10/2021 11:42:56		

Short Description

Additional Comments

Paragraph

**CI Common Attribute(s)**

CI Purpose	CI Baselining Date	Last Audited Date *
	Select value	06/09/2021
Serial Number *	Assets Number	Manufacturer
A92928	E34546	Choose one
Principal Supplier	Purchase Order No.	Purchase Date
	PO91818	Select value
Support Start Date	Support End Date	Support Vendor
Select value	Select value	Choose one
Maintenance Cost	Configuration Diary	Warranty End Date
		Select value
Leased	Lease start date	Lease end date
<input type="checkbox"/>	Select value	Select value

**CI Custom Attribute(s)**

CPU Type	CPU Speed	IP Address	Number of HDD
2.0		192.168.1.2	
Total HDD Space	CD/DVD Drive	Floppy Drive	Operating System
192.168.1.2			
Software Installed	Patches Installed	OS Service Pack Ver	

Update Cancel

### ADD NOTES

- To add any additional information or work logs to CI, click on **Action** → **Add Notes**.

The screenshot shows the 'Edit CI - CI-210526-0011' interface. At the top right, there are buttons for 'Update', 'Action', and 'View Attachment(s)'. The 'Action' dropdown menu is open, and the 'Add Notes' option is highlighted with a red box. Below the menu, there are several tabs: 'CI Details', 'Activity Log', 'Task (0)', 'Approval (0)', 'Related Tickets (2)', and 'Relationship'. The main form contains fields for 'Client Name \*' (Allied), 'Requestor Name \*' (SYSTEM.ADMIN), 'Location \*' (Mahape), 'CI Name \*' (ADCP-CHFD2\_D), 'CI Type \*' (Desktop), 'Assignment Group \*' (Service Desk), 'Technician Name' (Choose one), and 'Created On' (05/26/2021 17:07:43). The 'Add Notes' dialog box is not yet open.

2. Add Notes dialog box will open
3. Click on checkbox to select required action items available on notes window
  - a. **Internal Notes:** Notes will be visible only agents. By default added notes will be visible for both agents and end users.
  - b. **Email this note to technician:** Email notification will be sent to assigned technician with added notes.
  - c. **Email this note to support group:** Email notification will be sent to all members of ticket assigned group with notes.
  - d. **Email this note to requestor:** Email notification will be sent to requestor with added notes.
  - e. **Watch list:** This functionality enables technician to add any email id to keep posted with ticket updates. Once email id is added to watch list, all noticeable members will receive notification on any status change, on notes added and on resolution of the ticket.



**Add Notes**
✕

Internal Notes  
 Email this note to Support Group

Email this note to Requestor  
 Email this note to Technician

Watch List Email Id

▼

**Notes \***

Paragraph ▼
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☰
☰
☰
☰
🖼️
🗨️
📅
📺
↶
↷

Add Notes
Cancel

4. Enter the required comments/images/screenshots in the Notes section and click on **Add Notes**.
5. Added information will be visible in **Activity Log**.

#### ADD ATTACHMENT:

1. To add an attachment to a CI, click on **Action** → **Add Attachment**.
2. On clicking will open up a new window.
3. From the file chooser window, click on Browse to choose the file to be attached
4. Click open to upload the attachment.

Edit CI - CI-210526-0011
Update
Action ▼
View Attachment(s) ▼

CI Details
Activity Log
Task (0)
Approval (0)
Related Tickets (2)
Relationship
Ware (0)

**Client Name \***

Allied ▼

**Requestor Name \***

SYSTEM.ADMIN 👤

**Location \***

Mahape ⓘ

**CI Name \***

ADCP-CHFD2\_D

**CI Type \***

Desktop

**Assignment Group \***

Service Desk ⓘ

**Technician Name**

Choose one 🔍

Alternate Contact

Created By

Created On

05/26/2021 17:07:43

Add Notes
Add Attachment
Send Email
Set Reminder
New Incident
New Request
New Task
New Change
New Problem
New Article
New Approval

**Add Attachment**
✕

Browse...    No file selected.

Or Drag It Here.

	File Name	Attached By	Attached On
<input type="checkbox"/>	New Text Document.txt	Jagadeep Vudatha	06/20/2021 20:10:58

Delete Attachment
Close

All Uploaded attachments will be visible Under ‘View Attachment(s)’ tab.

Edit CI - CI-210526-0011

Update
Action ▾
View Attachment(s) ▾

CI Details
Activity Log
Task (0)
Approval (0)
Related Tickets (2)

New Text Document.txt
✕

### DELETE/ REMOVE ATTACHMENT:

To remove an attachment, click on respective attached attachment by clicking on checkbox and click on ‘Delete Attachment’.

**Add Attachment**
✕

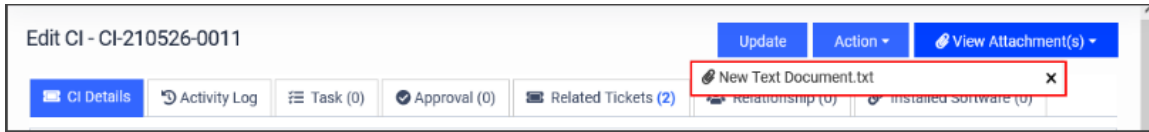
Browse...    No file selected.

Or Drag It Here.

	File Name	Attached By	Attached On
<input type="checkbox"/>	New Text Document.txt	Jagadeep Vudatha	06/20/2021 20:10:58

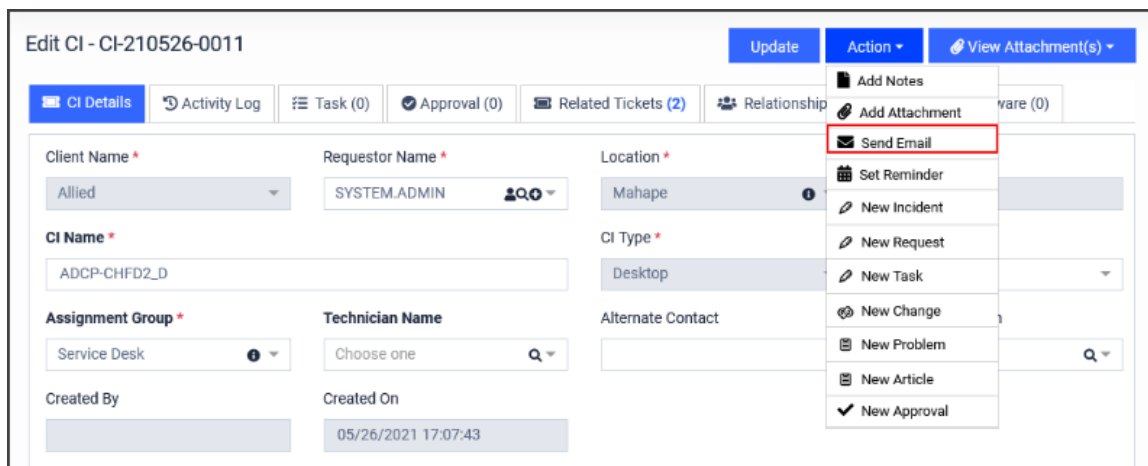
Delete Attachment
Close

To quick delete an attachment , click on ‘View Attachment(s)’ tab and go to respective attachment click on ‘x’ placed next to it.



**SEND MAIL:**

1. To send an email from CI, click on **Action → Send Email**.
2. Compose email, user email id and ticket id will be auto populated in ‘To’ and ‘Subject’ fields respectively. Attach any files by clicking on Browse.



3. When complete, click on **'Send Email'**. All actions are captured in Activity Log.

### SET REMINDER

Set reminder functionality allows agents to set a reminder to alert on some important tasks/events like contacting end user at specific given time or follow up on any task. It allow to put a date/time and option to select whomever you want to remind.

1. To a set reminder, click on **Action → Set Reminder**.
2. Set reminder dialog box is displayed. Enter the **Subject** and **Comments** in box.
3. Select checkbox, if required to send an email notification regarding the notification.
4. In select applicable option from **'To Whom'** drop down list.
  - a. **Remind me** – Reminder will be set for logged in agent.
  - b. **Support Group Members**- Reminder will be set for selected support group.
  - c. **Some else** – Provides option to set a reminder to specific person.
5. **Remind Time** –Select date/time to set a reminder.

Edit CI - CI-210526-0011

Update Action View Attachment(s)

CI Details Activity Log Task (0) Approval (0) Related Tickets (2) Relationship

Client Name \* Requestor Name \* Location \*  
 Allied SYSTEM.ADMIN Mahape

CI Name \* CI Type \*  
 ADCP-CHFD2\_D Desktop

Assignment Group \* Technician Name Alternate Contact  
 Service Desk Choose one

Created By Created On  
 05/26/2021 17:07:43

Add Notes  
 Add Attachment  
 Send Email  
**Set Reminder**  
 New Incident  
 New Request  
 New Task  
 New Change  
 New Problem  
 New Article  
 New Approval

**Set Reminder**

Subject \*

Comments \*

Send Email

To Whom \* Remind Time\*  
 Remind Me 06/21/2021 06:00:00

Submit Cancel

**Set Reminder**

Subject \*  
 Follow up at 11 AM

Comments \*  
 Follow up at 11 AM

Send Email

To Whom \* Remind Time\*  
 Remind Me 06/25/2021 11:00:00

Submit Cancel

**SHOW REMINDERS**

All scheduled reminders will be visible under **Action → Show Reminders**.

The screenshot shows the ADiTaaS interface for editing a CI (CI-210526-0011). The 'Action' menu is open, and 'Show Reminders' is highlighted. Below, the 'Show Reminders' dialog box is displayed, showing a table with one reminder item.

<input type="checkbox"/>	Notes	Subject	Scheduled Date & Time	Follow Up Type	Set By
<input type="checkbox"/>	Follow up at 11 AM	Follow up at 11 AM	06/25/2021 11:00:00	Remind Me	Jagadeep Vudatha

At the bottom of the dialog, there are buttons for 'Deactivate Reminder' and 'Cancel'.

## Deactivate the Reminder

Scheduled reminder can be deactivated with simple following steps.

1. Go to **Action** → **Show Reminders**
2. Select reminder by clicking on checkbox and click on **Deactivate Reminder**
3. Reminder Status will be marked as deactivated.

This screenshot is identical to the one above, showing the 'Show Reminders' dialog box. The 'Deactivate Reminder' button is highlighted in blue, indicating it is the next step in the process.

## QUICK LINKS TO CREATE TICKET FROM CI

Following links helps to create other module tickets from CI.

**Edit CI - CI-210526-0011**

Update | Action | View Attachment(s)

CI Details | Activity Log | Task (0) | Approval (0) | Related Tickets (2) | Relationship

Client Name \* Allied | Requestor Name \* SYSTEM.ADMIN | Location \* Mahape

CI Name \* ADCP-CHFD2\_D | CI Type \* Desktop

Assignment Group \* Service Desk | Technician Name Choose one

Created By | Created On 05/26/2021 17:07:43

Action Menu:

- Add Notes
- Add Attachment
- Send Email
- Set Reminder
- New Incident**
- New Request**
- New Task**
- New Change
- New Problem
- New Article
- New Approval

## New Article

Allows to raise an article from CI

1. Go to **Action** → **New Article**
2. Enter the new article details and click on submit
3. CI will be linked to the article.

Enter ticket number and search...

**Create Knowledge Article** | Add Attachment | Submit

Client Name \* Allied | Status \* DRAFT

Category/Sub Category/Item \* | Problem Title \*

Problem Description \*

Assignment Group \* Choose one | Technician Name Choose one | Source \* Choose one | Type \* Choose one

Available For \* Choose one | **Configuration Item** | CI-210526-0011

Additional Link | Tags | Opened By Jagadeep Vudatha | Opened Date 06/25/2021 06:23:51

Article Image

## New Task

Allows to raise a new task ticket from CI

- Go to **Action** → **New Task**
- Enter the new task details and click on submit

- New created task ticket will be linked to CI.

## New Problem

Allows to raise a new problem ticket from CI

- Go to **Action** → **New Problem**
- Enter the new problem details and click on submit
- CI will be linked to the Problem.

## New Change

Allows to raise a new change ticket from CI

- Go to **Action** → **New Change**



- Enter the new change details and click on submit
- CI will be linked to the Change.

## New Request

Allows to raise a new request ticket from CI

- Go to **Action** → **New Request**
- Enter the new request details and click on submit
- CI will be linked to the Request.

## New Approval

Allows to raise an approval ticket from CI

- Go to **Action** → **New Approval**
- Enter the new approval ticket details and click on submit
- New created approval ticket will be linked to CI

### Create Approval

Add Attachment
Submit ✕

Approval For

Status \*

Approval Group \*

Approver

Submitted Date

Sequence Of \*

Comments \*

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Submit
Cancel

## CI ACTIVITY LOG

**Activity log** captures all actions performed on ticket from CI creation to closure with date/time stamp along with agent id. All modification performed on CI is auto captured. From the creation of CI to dispose all activities are captured with order. All activities like add notes, add attachment, setting a reminder, creating task, creating approvals, linking CI's all activities are capture in activity log with sequence.

Edit CI - CI-210526-0011 Update Action

CI Details
Activity Log
Task (1)
Approval (1)
Related Tickets (3)
Relationship (0)
Installed Software (0)

» Detailed Activity Log Activity Type: All

👤 **Approval created on 06/25/2021 06:35:56 by user = Jagadeep Vudatha**

Approval created for AP-210625-0001 with this CI

📅 **Task attached on 06/25/2021 06:26:27 by user = Jagadeep Vudatha**

Task attached T-210625-0001 with this incident

🔔 **Reminder Set On 06/25/2021 06:14:12 by user = Jagadeep Vudatha**

Subject:- Follow up at 11 AM  
Comments - Follow up at 11 AM  
by user - Jagadeep Vudatha  
Remind Time - 06/25/2021 11:00:00  
Reminder Sent To - jvudatha@allegdigital.net;

## TASK

Agent can create a new Task and link to CI or open any existing tasks and can link to CI.

Edit CI - CI-210526-0011 Update Action

CI Details
Activity Log
Task (1)
Approval (1)
Related Tickets (3)
Relationship (0)
Installed Software (0)

» Current Tasks Create New Link Existing Task Detach Task

ID	Title	Requestor Name	Assignment Group	Status	Sequence
<a href="#">T-210625-0001</a>	Task 1	Priya Lewis	Service Desk	OPEN	1

**Create New**- Click on **Task** → **Create New** to create a new Task.

**Create Task**

Add Attachment
Submit
✕

**Client Name \***

**Requestor Name \***

**Task Name \***

**Linked To**

**Status \***

**Assignment Group \***

**Technician Name**

**Opened By**

**Opened Date**

**Due Date**

**Sequence \***

**Task Description \***

**Additional Comments \***

Paragraph

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Submit
Cancel

**Link Existing Task**- To link existing link Tasks, click on **Task** → **Link Existing Task**  
Displays list of existing Tasks. Agent can link one or more tasks to CI by clicking on checkboxes.

**Link To**

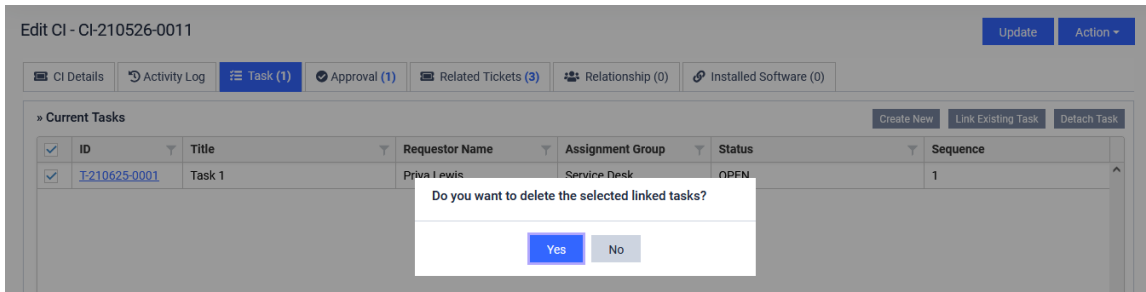

✕

<input type="checkbox"/>	ID	Title	Requestor Name	Assignment Group	Technician Name	Status	Sequence	Opened Date
<input type="checkbox"/>	T-210620-0006	Check Network Status	Priya Lewis	Network Support		OPEN	2	06/20/2021 17:1
<input type="checkbox"/>	T-210620-0005	Check Application Status	Priya Lewis	Service Desk		OPEN	1	06/20/2021 17:1
<input type="checkbox"/>	T-210620-0004	Check database status	Priya Lewis	Server Support		OPEN	1	06/20/2021 17:1
<input type="checkbox"/>	T-210619-0006	Check Network Status	Jagadeep Vudatha	Network Support		OPEN	2	06/19/2021 10:3
<input type="checkbox"/>	T-210619-0005	Check Application Status	Jagadeep Vudatha	Service Desk		OPEN	1	06/19/2021 10:3
<input type="checkbox"/>	T-210619-0004	Check database status	Jagadeep Vudatha	Server Support		OPEN	1	06/19/2021 10:3
<input type="checkbox"/>	T-210619-0003	Check network connection	Priya Lewis	Service Desk		OPEN	2	06/19/2021 06:3
<input type="checkbox"/>	T-210619-0002	Check user machine configuration	Priya Lewis	Service Desk		OPEN	1	06/19/2021 06:3
<input type="checkbox"/>	T-210619-0001	Check MS OFFICE software	Priya Lewis	Service Desk		OPEN	1	06/19/2021 06:3
<input type="checkbox"/>	T-210617-0002	Check Application Status	Jagadeep Vudatha	Service Desk		OPEN	1	06/18/2021 01:5

1 - 10 of 18 items

Link
Cancel

**Detach Task**- Select respective Task by clicking on checkbox and click on **‘Detach Task’** to unlink it.



## APPROVALS

If a CI requires formal approval before proceeding, Agent can create an approval manually by clicking on **Approval** → **Create New**.

Enter all \* marked following mandatory fields.

ID Number	Status	Comments	Sequence Of	Approval Group	Approver	Requested By	Opened Date	Created By	Authori
AP-210625-0001	OPEN	Approval required	1	Regional Approval Group	Jagadeep Vudatha	SYSTEM.ADMIN	06/25/2021 06:35:56	Jagadeep Vudatha	

**Create Approval**

Approval For: CI-210526-0011

Status \*: OPEN

Approval Group \*: Choose one

Approver: Choose one

Submitted Date: 06/25/2021 06:35:06

Sequence Of \*: 1

Comments \*: Paragraph

Buttons: Add Attachment, Submit, Cancel

On submitting a request for approval, approver will receive an approval mail with a link to approve or reject the request.

**Edit Approval - AP-210625-0001** Add Attachment

Approval For:       Status:       Approval Group:       Approver:

Submitted Date:       Sequence Of:

Approver Comments \*

Paragraph

Comments \*

Paragraph

Approve
Reject
Update
Cancel

All linked approvals will visible under Approval Tab. If the logged in user is a managerial user, then he can open the approval and click on **Approve** or **Reject**.

To detach any approval, click on '**Detach Approval**'.

**Edit CI - CI-210526-0011** Update Action

CI Details | 
 Activity Log | 
 Task (1) | 
 Approval (1) | 
 Related Tickets (3) | 
 Relationship (0) | 
 Installed Software (0)

» Approval Create New Detach Approval

<input type="checkbox"/>	ID Number	Status	Comments	Sequence Of	Approval Group	Approver	Requested By	Opened Date	Created By	Authori
<input type="checkbox"/>	<a href="#">AP-210625-0001</a>	OPEN	Approval required	1	Regional Approval Group	Jagadeep Vudatha	SYSTEM.ADMIN	06/25/2021 06:35:56	Jagadeep Vudatha	

**Do you want to detach the selected linked Approvals?**

Yes
No

**Reason For Detach** ✕

---

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Submit
Cancel

## RELATED TICKETS

Displays list of all related tickets raised for CI.

Edit CI - CI-210526-0011 Update Action

---

CI Details
Activity Log
Task (1)
Approval (1)
Related Tickets (3)
Relationship (0)
Installed Software (0)

» Related Tickets

ID	Status	Requestor Name	Assignment Group	Technician Name	Category	Sub Category	Item	Priority	Title
<a href="#">IN-210625-0001</a>	OPEN	Priya Lewis	Network Support L2		HARDWARE	LAPTOP	LENOVO- X1 YOGA	P4	Issue found on ADCP-CHFD2
<a href="#">PR-210603-0001</a>	OPEN	Jagadeep Vudatha	Service Desk		SYSTEM	MONITORING	ALERT	P4	Intermittent Network Issue
<a href="#">PR-210525-0001</a>	CLOSED	Deepak Shukla	Service Desk		SYSTEM	MONITORING	ALERT	P1	Exchange Server Down

## RELATIONSHIP

Tool facilitates to configure relationship between the CI.

Edit CI - CI-210526-0011 Update Action

---

CI Details
Activity Log
Task (1)
Approval (1)
Related Tickets (3)
Relationship (0)
Installed Software (0)

» CI's Relationship Add New Relationship Detach Relationship Relationship Graph

<input type="checkbox"/>	ID	CI Name	Type	Serial No.	Model No.	Vendor Nam

**Add New Relationship** – On clicking displays a list of CI. Select the CI required for configuring the relationship. Click on Link.

**Link To**
✕

CI Type \* Search Text

(All)

Search

Search

<input type="checkbox"/>	ID	CI Name	CI Type	Requestor Name	Vendor Name	Serial Number	Model No.	Client	Created By
<input type="checkbox"/>	CI-210610-0002	DDCP-CHFD4	Desktop	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210610-0001	Desktop CI	Desktop	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210606-0001	Canon Pixma G3000	Network Printer	ITSM Agent				Allied	Jagadeep Vuda
<input type="checkbox"/>	CI-210605-0001	LAP-090909	Laptop CI	Jagadeep Vudatha				Allied	Jagadeep Vuda
<input type="checkbox"/>	CI-210526-0041	ABCABCINESDFCMDB0	Server	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210526-0040	ABCABCUSESUPWEB04	Server	SYSTEM.ADMIN				Allied	
<input type="checkbox"/>	CI-210526-0039	ABCABCINESDFITSM0	Server	SYSTEM.ADMIN				Allied	

1 - 25 of 54 items

Link
Cancel

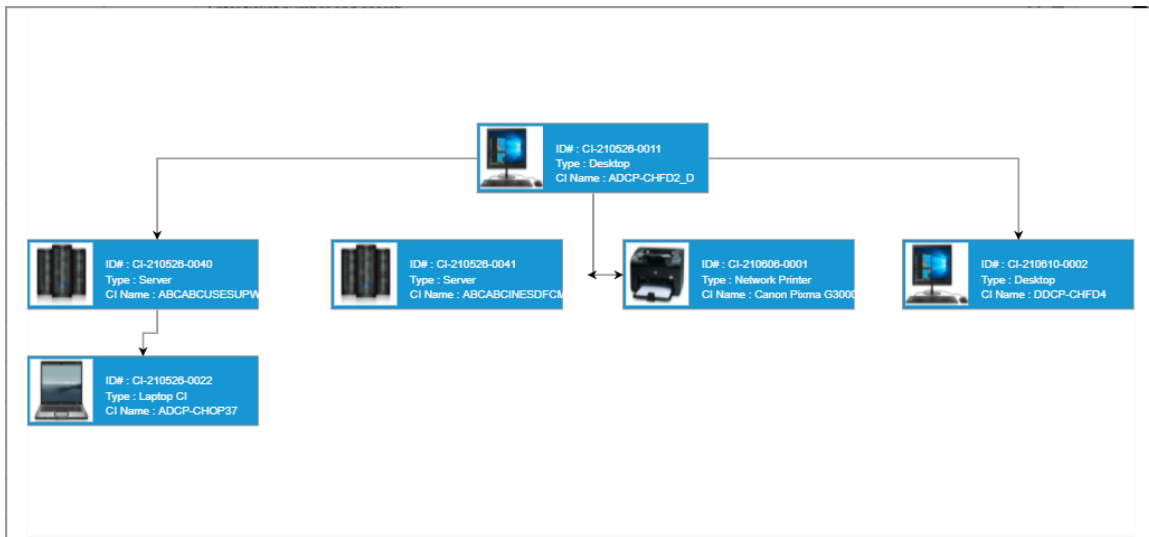
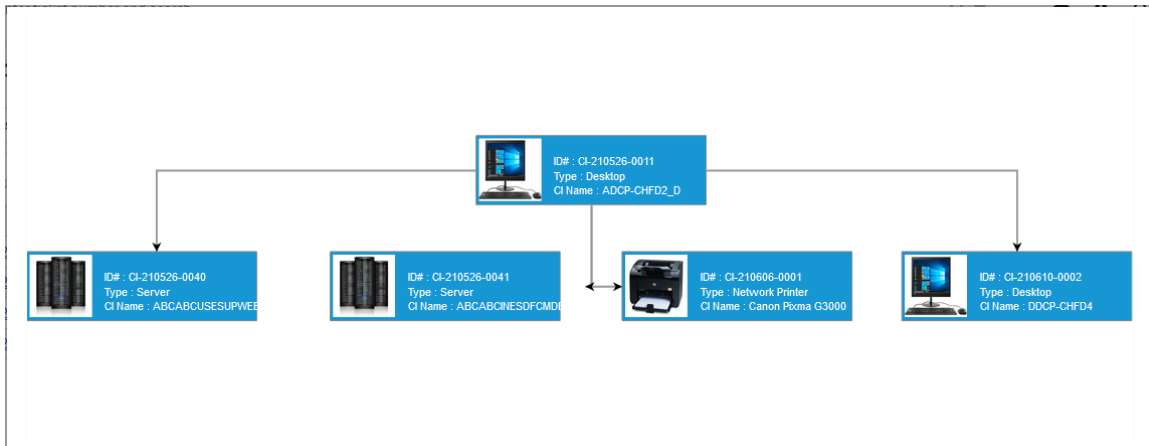
**Detach Relationship** – By clicking on checkbox, select CI that required to remove from relationship.

Do you want to delete the selected linked CI's?

Yes
No

**Relationship Graph** – Displays graphical view of CI relationship. If any specific CI is linked to other CI then relationship will be displayed in next level.





## INSTALLED SOFTWARE

Tool facilitate to manage list of softwares installed on CI

Edit CI - CI-210526-0011 Update Action

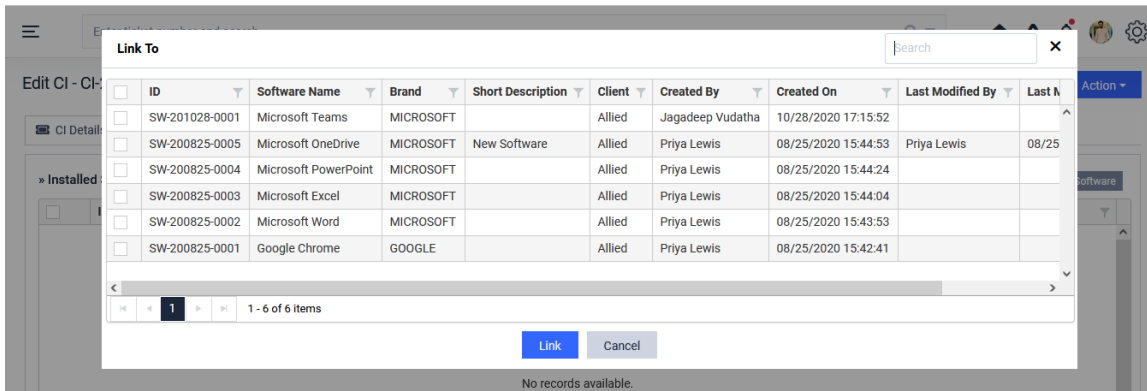
CI Details
Activity Log
Task (1)
Approval (1)
Related Tickets (3)
Relationship (4)
Installed Software (2)

» Installed Software Add Software Detach Software

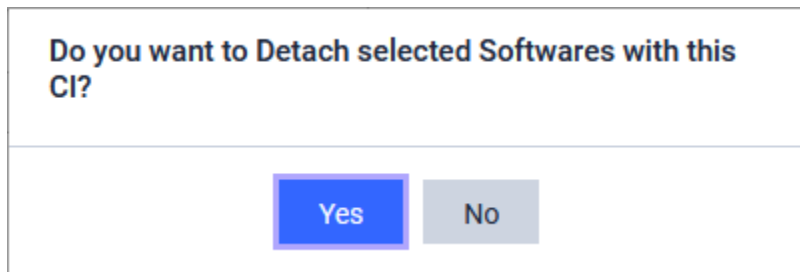
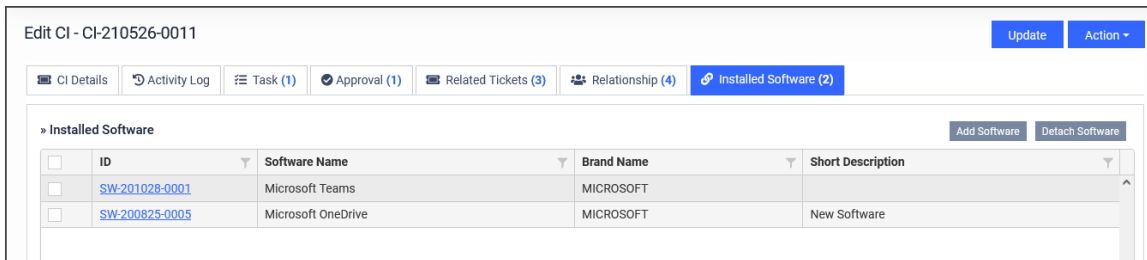
<input type="checkbox"/>	ID	Software Name	Brand Name	Short Description
<input type="checkbox"/>	<a href="#">SW-201028-0001</a>	Microsoft Teams	MICROSOFT	
<input type="checkbox"/>	<a href="#">SW-200825-0005</a>	Microsoft OneDrive	MICROSOFT	New Software

**Add Software**- On clicking displays a list of software. By clicking on checkbox select the list of softwares installed on the CI





**Detach Software-** By clicking on checkbox, select the CI that required to be removed from installed software list.



### MANAGE CI IN CREATE/EDIT TICKET SCREEN

In new /edit ticket screen we have a configuration item as an individual field. There is an icon called impacted CI and clicking on that it will pop up a new window with CI details, ticket information and history of the CI. This information is coming from CMDB, but however CMDB can be integrated with 3rd party configuration management system and in real time it will do the update on CMDB and display the information on this particular screen.

**AdiTaaS** CONQUERING COMPLEXITY

Jagadeep Vudatha  
Practice Manager

MAIN MENU

- Dashboard
- My Mailbox
- My Favorites
- Incident
  - Create New
  - P1/Critical Incidents (86)
  - My Work (25)
  - My Group Work (696)
  - Open - Unassigned (625)
  - Resolved (381)
  - Closed (183)
  - Rejected (28)
  - Scheduled Incidents (17)
  - Calendar View
  - Visual Board
- Request

Enter ticket number and search...

**Create New Incident** Common Incidents Add Attachment Submit

Client Name \* Allied Requestor Name \* Priya Lewis Location Mahape Contact No.

Category/Sub Category/Item \*

Impact \* LOW Urgency \* LOW Status \* OPEN Notification Mode \*

Priority \* P4 Channel PHONE

Assignment Group \* Choose one Technician Name Choose one Configuration Item

Alternate Location

Flags Choose one

NEFCR Description \* Vendor Ticket Number

Configuration Item List:

- CI-200618-0001 LANPRINTR003
- CI-200721-0009 test123
- CI-200807-0002 PRINTR009
- CI-200917-0001 PRINT009
- CI-200612-0002

Alternate Contact

Opened By Jagadeep Vudatha

**AdiTaaS** CONQUERING COMPLEXITY

Jagadeep Vudatha  
Practice Manager

MAIN MENU

- Dashboard
- My Mailbox
- My Favorites
- Incident
- Request
- Knowledge
- Problem
- Change
- Release

Enter ticket number and search...

**Create New Incident** Common Incidents Add Attachment Submit Search Related Items

Client Name \* Allied Requestor Name \* Priya Lewis Location Mahape Contact No. 9876567898

Category/Sub Category/Item \*

Status \* OPEN Preferred Contact Primary

Notification Mode Impact \* LOW Urgency \* LOW Priority \* P4

Channel \* PHONE Assignment Group \* Choose one Technician Name Choose one Configuration Item

Alternate Contact Alternate Location

Configuration Item List:

- CI-200618-0001



The screenshot shows a web application interface for AdiTaaS. A modal window titled "LANPRNTR003 (CI-200618-0001) Details" is open, displaying a "CI's History" tab. The history shows four events:

- Reminder Set On 10/28/2020 16:24:08 Set By User = Jagadeep Vudatha**  
Subject- Reminder  
Comments -: Reminder  
Set By User -: Jagadeep Vudatha  
Remind Time -: 10/28/2020 16:26:00  
Reminder Sent To -: Jagadeep Vudatha ;
- Attachment added on 10/28/2020 16:23:04 Added by user = Jagadeep Vudatha**  
Attachment Name:- Export (52).xlsx, Added by user = Jagadeep Vudatha
- Notes added on 10/28/2020 16:22:12 Added by user = Jagadeep Vudatha**  
notes
- CI created on 06/18/2020 16:23:09 by User = Priya Lewis**  
Client:- Allied

The interface includes a sidebar with navigation options like "Dashboard", "My Mailbox", "My Favorites", "Incident", "Create New", "P1/Critical", "My Work", "My Group", "Open - Un", "Resolved", "Closed", "Rejected", "Schedule", "Calendar", "Visual Bo", and "Request". The user profile "Jagadeep Vudatha" is visible at the top left of the modal.



**Create Incident-** On clicking new incident new incident ticket gets created and interaction ticket will be added as interaction in incident ticket. Interaction status will be marked as closed.

**Create New Incident**

Add Attachment
Submit
✕

<b>Client Name *</b>	<b>Requestor Name *</b>	<b>Location</b>	<b>Contact No.</b>
<input type="text" value="Allied"/>	<input type="text" value="Deepak Shukla"/> <span style="font-size: 0.8em;">👤🔍 TIP</span>	<input type="text" value="Mahape"/>	<input type="text"/>
<b>Category/Sub Category/Item *</b>	<b>Status *</b>	<b>Preferred Contact</b>	<b>Priority *</b>
<input type="text"/>	<input type="text" value="OPEN"/>	<input type="text" value="Primary"/> <span style="font-size: 0.8em;">✕</span>	<input type="text" value="P4"/> <span style="font-size: 0.8em;">📌</span>
<b>Notification Mode</b>	<b>Impact *</b>	<b>Urgency *</b>	<b>Configuration Item</b>
<input type="text"/>	<input type="text" value="LOW"/>	<input type="text" value="LOW"/>	<input type="text" value="Choose one"/> <span style="font-size: 0.8em;">🔍</span>
<b>Channel *</b>	<b>Assignment Group *</b>	<b>Technician Name</b>	<b>Alternate Contact *</b>
<input type="text" value="PHONE"/>	<input type="text" value="Choose one"/> <span style="font-size: 0.8em;">📌</span>	<input type="text" value="Choose one"/>	<input type="text"/>
<b>Alternate Location</b>	<b>Flags</b>	<b>Submit</b>	<b>Cancel</b>
<input type="text"/>	<input type="text" value="Choose one"/>	<span style="background-color: #007bff; color: white; padding: 5px 15px; border-radius: 3px; margin-right: 10px;">Submit</span> <span style="background-color: #ccc; padding: 5px 15px; border-radius: 3px;">Cancel</span>	

**Create Request-** On clicking new request new request ticket gets created and interaction ticket will be added as interaction in request ticket. Interaction status will be marked as closed.

**Create Request**

Add Attachment
Submit
✕

<b>Client Name *</b>	<b>Requestor Name *</b>	<b>Location</b>	<b>Contact No.</b>
<input type="text" value="Allied"/>	<input type="text" value="Deepak Shukla"/> <span style="font-size: 0.8em;">👤🔍 TIP</span>	<input type="text" value="Mahape"/>	<input type="text"/>
<b>Category/Sub Category/Item *</b>	<b>Status *</b>	<b>Impact *</b>	<b>Priority *</b>
<input type="text"/>	<input type="text" value="OPEN"/>	<input type="text" value="LOW"/>	<input type="text" value="P4"/> <span style="font-size: 0.8em;">📌</span>
<b>Urgency *</b>	<b>Channel *</b>	<b>Assignment Group *</b>	<b>Alternate Location</b>
<input type="text" value="LOW"/>	<input type="text" value="PHONE"/>	<input type="text" value="Choose one"/> <span style="font-size: 0.8em;">📌</span>	<input type="text"/>
<b>Technician Name</b>	<b>Configuration Item</b>	<b>Alternate Contact</b>	<b>Vendor Ticket Number</b>
<input type="text" value="Choose one"/>	<input type="text" value="Choose one"/> <span style="font-size: 0.8em;">🔍</span>	<input type="text"/>	<input type="text"/>
<b>Opened By</b>	<b>Opened Date</b>	<b>Short Description *</b>	
<input type="text" value="Jagadeep Vudatha"/> <span style="font-size: 0.8em;">📌</span>	<input type="text" value="06/25/2021 19:25:14"/>	<input type="text" value="Timesheet not updated."/>	
<b>Submit</b>		<b>Cancel</b>	

**Add to Existing Ticket-** If there is a ticket available, then agent has provision to update the interaction with ticket id. Interaction will be added as notes in ticket. Interaction status will be marked as closed.

Customer Name: Allied

Action Column Visibility 25 Search Cancel

ID	Title	Requestor Name	Status	Assignment Group
<a href="#">IN-200303-0001</a>	Jagadeep Vudatha for Unlock the Account	Jagadeep Vudatha	OPEN	Service Desk
<a href="#">IN-200617-0024</a>	Application Slowness Issue, Application Name: Servi	Jagadeep Vudatha	OPEN	Server Support L2
<a href="#">IN-200228-0022</a>	Jagadeep Vudatha for Unlock the Account	Jagadeep Vudatha	OPEN	Service Desk
<a href="#">IN-210609-0019</a>	Desktop not working	Nick McDonald	APPROVED	Server Support L2
<a href="#">IN-200616-0081</a>	Shared Email Box	Jagadeep Vudatha	OPEN	Server Support L2
<a href="#">R-200623-0006</a>	Smart Badge Activation	Jagadeep Vudatha	OPEN	Service Desk
<a href="#">R-200616-0112</a>	Software Installation	Jagadeep Vudatha	OPEN	Service Desk
<a href="#">IN-200304-0001</a>	Jagadeep Vudatha for Unlock the Account	Jagadeep Vudatha	OPEN	Service Desk
<a href="#">R-200705-0001</a>	Laptop Request LENOVO- X1 YOGA	Jagadeep Vudatha	APPROVED	Service Desk
<a href="#">IN-200810-0011</a>	Application Slowness Issue, Application Name: Servi	Jagadeep Vudatha	OPEN	Server Support L2
<a href="#">IN-210526-0003</a>	Network is down in building 5	Sam R	OPEN	Service Desk
<a href="#">IN-210610-0004</a>	UNABLE TO INSTALL MS OFFICE	Priya Lewis	OPEN	Service Desk
<a href="#">IN-200624-0005</a>	Application Slowness Issue, Application Name: Servi	Jagadeep Vudatha	OPEN	Server Support L2
<a href="#">IN-200628-0014</a>	Printer Connection Issue, Printer Name: Epson L3152	Jagadeep Vudatha	OPEN	Service Desk

1 2 3 4 5 ... 1 - 25 of 2337 items

**Reject-** If there is no any action required, interaction can be marked as **Rejected**. All Rejected interactions will be visible under Rejected data grid.

**ADiTaaS** CONQUERING COMPLEXITY

Jagadeep Vudatha Practice Manager

Change Release Task Interaction Pending (10) **Rejected (1)**

Enter ticket number and search...

Customer Name: Allied

Action Column Visibility 25 Search

ID	Title	Description	Requestor Name	Status	Created By	Created On
<a href="#">INT-210421-0002</a>	Timesheet not updated.	From: younify.support@allie...	Deepak Shukla <span style="color: red;">TIP</span>	REJECTED	SYSTEM.ADMIN	04/21/2021 20:11:00

1 1 - 1 of 1 items

## Reports

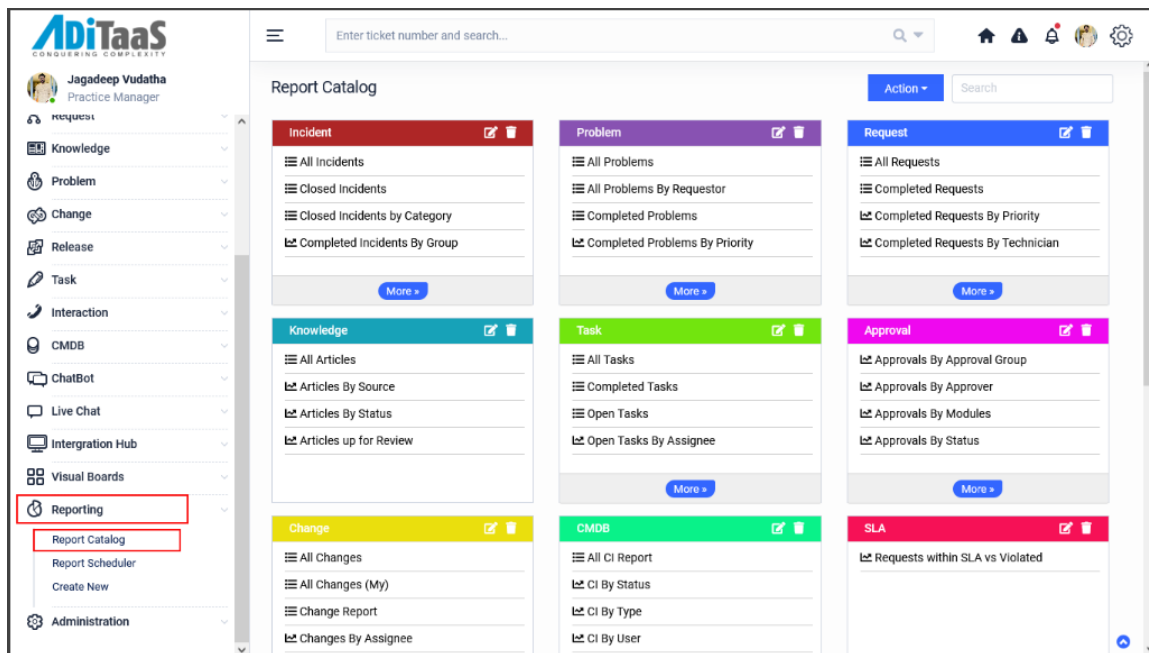
ADiTaaS provides facility to create numerous reports. Along with creation of new reports users can access and download ready available reports from Report Catalog. User can create brand new report by clicking on **Create New** option.

### REPORT CATALOG

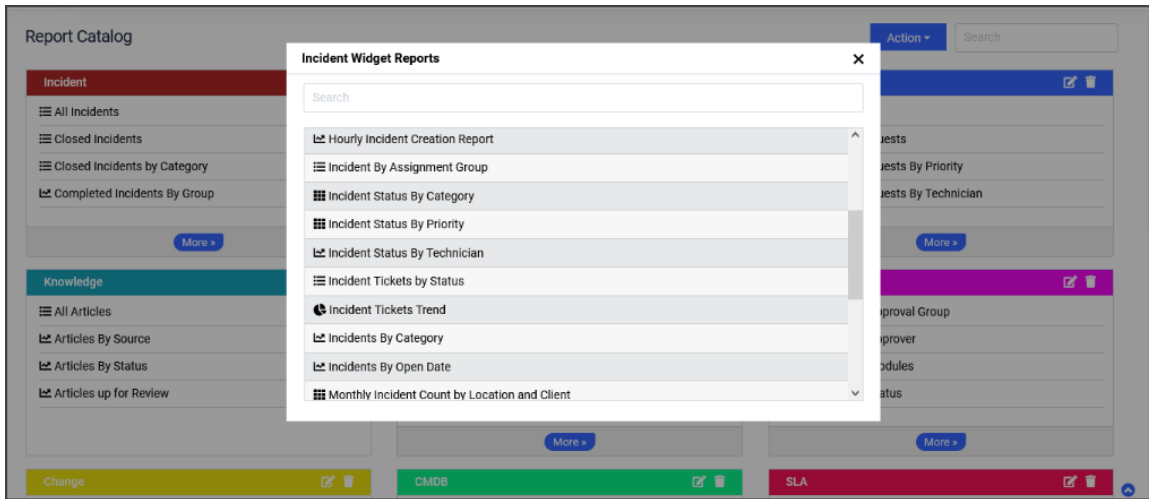
A catalog of reports enables data users to easily find the report they need. Set of preset help desk, problem/change and asset reports and so on generated from the data available in the application.

#### To view the various reports available in application

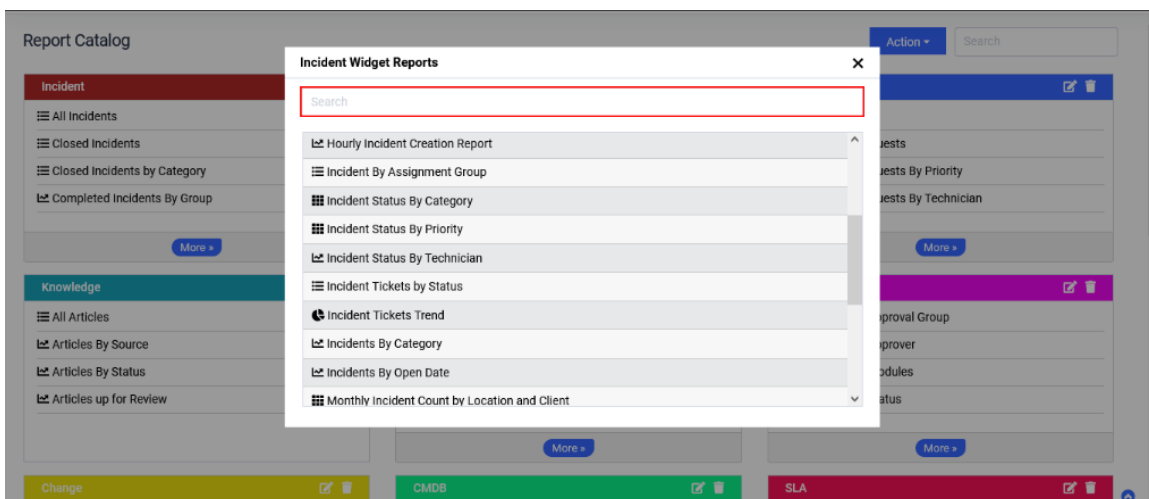
1. Log in to the ADiTaaS application using the credentials.
2. Click the **Report Catalog** under **Reporting** module from the left side menu bar. The next page lists the various reports grouped under different **Report Widgets**.
3. On respective **Report Widget**, clicking on **more** will display additional reports in pop up.





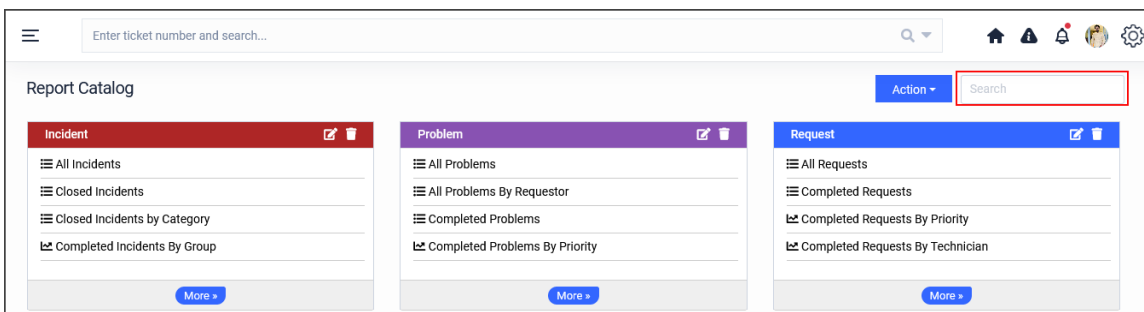


Wild card search on pop up window will facilitate to search reports by entering the keywords.

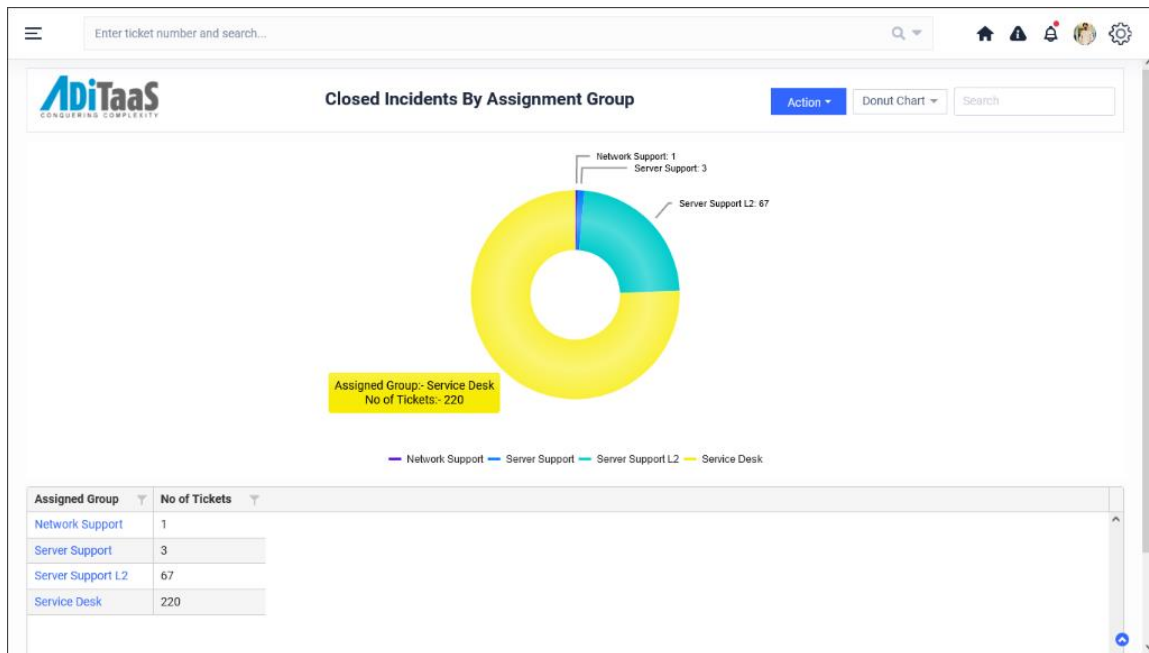


### REPORT CATALOG- SEARCH

Search enables to quick search for any reports available in Report Catalog.



Click on required report to from Report catalog to view.



## REPORT CATALOG – ACTION MENU

### Add Report

1. On clicking **Add Report** from **Action** menu will display list of ready available reports with preview option. Select required report by clicking on checkbox and click on **Preview**.

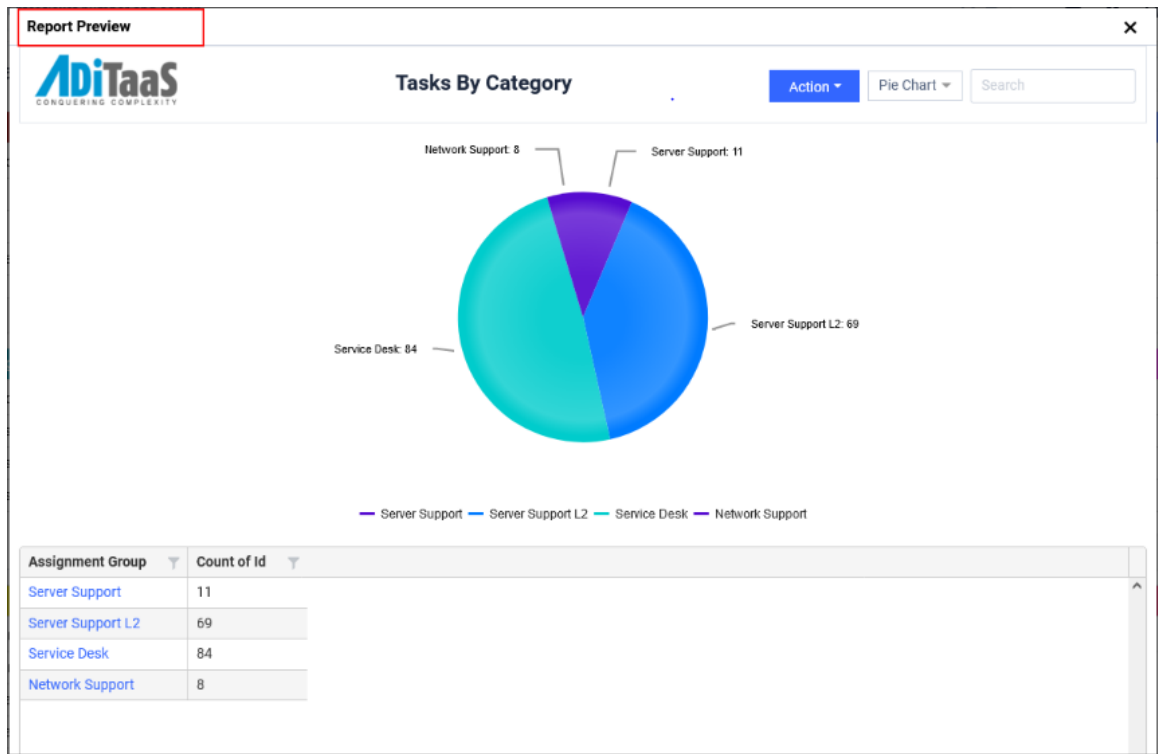
### Add Reports ✕

<input type="checkbox"/> Completed Problems	<span>Preview</span>
<input type="checkbox"/> All Articles	<span>Preview</span>
<input type="checkbox"/> CI Creation Graph	<span>Preview</span>
<input type="checkbox"/> Incident Status By Category	<span>Preview</span>
<input type="checkbox"/> All Requests	<span>Preview</span>
<input type="checkbox"/> All Tasks	<span>Preview</span>
<input type="checkbox"/> Changes By Change Initiator	<span>Preview</span>
<input type="checkbox"/> Open Tasks	<span>Preview</span>
<input type="checkbox"/> Open Incident By Group (Summary)	<span>Preview</span>
<input type="checkbox"/> Open Changes By Assignee	<span>Preview</span>

**Select Widget \***

Add Report Cancel

2. On Report Preview, tool allows to change the graph type and view the report on real time.



- To add existing report in Report Catalog page, select the required reports and select the Report widget from the drop down list and click on add report.

### Add Reports ✕

<input type="checkbox"/> Completed Incidents By Resolved Date	<a href="#">Preview</a>
<input type="checkbox"/> All Problems	<a href="#">Preview</a>
<input type="checkbox"/> Completed Problems By Priority	<a href="#">Preview</a>
<input type="checkbox"/> Completed Problems By Technician	<a href="#">Preview</a>
<input type="checkbox"/> Problem Tickets By Assignment Group	<a href="#">Preview</a>
<input checked="" type="checkbox"/> <b>Tasks By Category</b>	<a href="#">Preview</a>
<input type="checkbox"/> Incident Status By Technician	<a href="#">Preview</a>
<input type="checkbox"/> Completed Incidents By Group	<a href="#">Preview</a>
<input type="checkbox"/> Closed Incidents by Category	<a href="#">Preview</a>
<input type="checkbox"/> Closed Incidents	<a href="#">Preview</a>

**Select Widget \***

Task

Add Report

Cancel

4. On submitting, new added report will be visible under selected report widget.

Change

- ≡ All Changes
- ≡ All Changes (My)
- ≡ Change Report
- ≡ Changes By Assignee

[More >](#)

CMDB

- ≡ All CI Report
- ≡ CI By Status
- ≡ CI By Type
- ≡ CI By User

[More >](#)

Raw Data Report

- ≡ Incident Status By Category
- ≡ **Tasks By Category**

SLA

- ≡ Requests within SLA vs Violated

Archive Reports

- ≡ Archived Incidents
- ≡ Archived Problems

Master Data

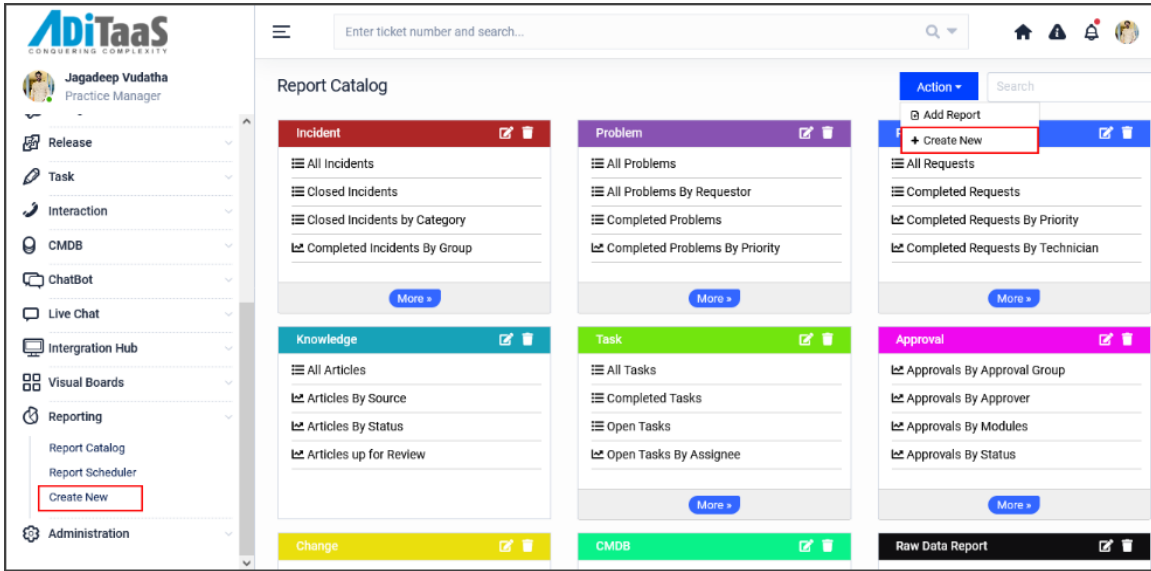
- ≡ Incoming Tickets By Month

### CREATE NEW

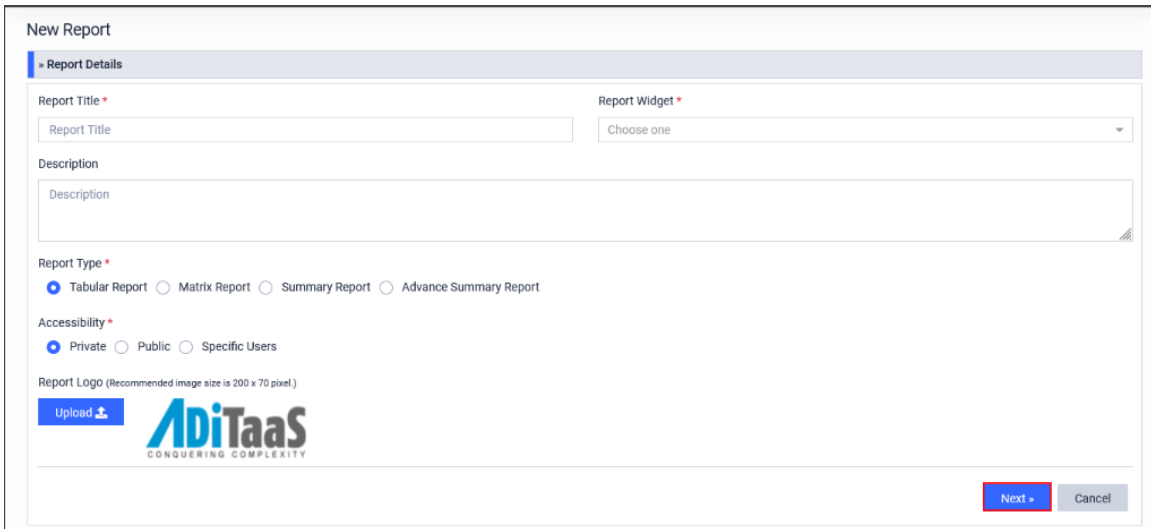
Tool enables you to create reports that meet your need if you are unable to find them from the list of out-of-the-box reports already available.

**To create your custom reports,**

1. Click on **Create New** under **Report Catalog** → **Action** menu Or **Reporting** module enables to create a new report.



2. This opens the **New Report** creation page that will help you navigate through the various steps involved in the creation of a custom report.
3. Specify the relevant Report Title in the given text field. This is a mandatory field.



4. Select the required report widget from the drop down list where you would like to see the configured report.

Report Widget \*

Choose one

- Incident
- Knowledge
- Pink Verify**
- Problem
- Raw Data Report
- Request
- SLA
- Task

### Create New Report Widget

Tool enables you to create new report widget that meet your need if you are unable to find them from the list of report widgets already available.

- a. Click on **Report Widget** drop down list
- b. Click on **New Option**

Report Widget \*

Choose one

- Pink Verify
- Problem
- Raw Data Report
- Request
- SLA
- Task
- Trending Reports
- (New)**

- c. Specify the relevant **Widget Title** in the given text field. This is a mandatory field.
- d. Click on **Color** to select the shade for widget
- e. Click on **Submit**
- f. Newly created report widget will be appear on Report Widget drop down list as well on Report Catalog.



The image shows a 'New Report Widget' dialog box. It has a title bar with a close button (X). The form contains three main sections: 'Widget Title \*' with a text input field containing 'Widget Title'; 'Description' with a larger text area containing 'Description'; and 'Color' with a color picker showing a teal color. At the bottom right, there are two buttons: 'Submit' (highlighted with a red border) and 'Cancel'.



5. Choose the **Report Type** by selecting the radio buttons. You can create **Tabular Reports**, **Matrix Reports**, **Summary Reports**, and **Advance Summary Reports**.



Report Type \*

- Tabular Report  Matrix Report  Summary Report  Advance Summary Report

6. Choose the **Accessibility** selecting the radio buttons. You can create **Private**, **Public** and **Specific Users**.


- **Private**- Report will be visible only to the user who has created the report
- **Public**- Report will be visible to all
- **Specific Users** - Report will be visible only to the specified users

Accessibility \*

- Private  Public  Specific Users

7. By clicking on **Report Logo**, tool allows to upload a new logo for report. By default organization logo will appear on reports.

Report Logo (Recommended image size is 200 x 70 pixel.)


Upload 



8. Click Proceed to **Next >>** button. This opens the **Data Configuration Page**.

New Report (Monthly Incident Ticket Trend)

» Report Details

Report Title \*  Report Widget \*  

Description



Report Type \*

Tabular Report  Matrix Report  Summary Report  Advance Summary Report

Accessibility \*

Private  Public  Specific Users

Report Logo (Recommended image size is 200 x 70 pixel.)

Upload  

9. In **Module Configuration**, Choose the module (Incident, Request, Problem, Change and so on) for which you wish to create the report.

10. Next navigate to Column Configuration page. This page differs for each report type. Each report type has to go through various steps before generating it as a customized report.

### To generate Tabular Reports

Tabular reports are simple reports that allow you to list your data based on certain criteria. We have selected the Tabular Reports option under Report Type.

- a. The first step to create tabular reports is to select the display columns which need to be displayed in the tabular report. Select the columns from the **Data source field** list box and click button to move them to Columns list box. Click the button if you want to remove any column from the Columns list box.
- b. **Group By** allows to grouping of columns, where you can choose two levels of grouping.
- c. There are action available at column field level to **Rename**, **Remove**, **Sort** and get a **Row count** or **distinct count**.

» Columns Configuration

Datasource Field(s)	Column(s) *
Id	Id
Short Description	Short Description
Symptoms	Symptoms
Client Name	Client Name
Open Date	Open Date
Category	Category
Sub-Category	Sub-Category
Item	Item
Priority	Status

Group By

Requestor Name
Priority

11. Next move to **Filter Configuration**, click on **Add** to add condition. If you are using the date/time filter criteria, select the date column name from the field name drop down list.

» Filter Configuration

(	Field Name *	Operator *	Compare With *	)	Runtime
	Choose one				<input type="checkbox"/>

+ ADD

» Drill-Down Configuration

Open Date  
Category  
Sub-Category  
Item  
Priority  
Status  
Assignment Group

< Back Finish & View Cancel

» Filter Configuration

(	Field Name *	Operator *	Compare With *	)	Runtime
	Open Date	Choose one			<input type="checkbox"/>

+ ADD

» Drill-Down Configuration

Equals  
Not equals  
>  
>=  
<  
<=  
Between  
Is null

< Back Finish & View Cancel

» Filter Configuration

(	Field Name *	Operator *	Compare With *	)	Runtime
	Open Date	<=	Choose one		<input type="checkbox"/>

+ ADD

Value  
System Field

» Filter Configuration

(	Field Name *	Operator *	Compare With *	)	Runtime
	Open Date	<=	System Field	Choose one	<input type="checkbox"/>
+ ADD					

» Drill-Down Configuration

Today  
Now  
Tomorrow  
Yesterday  
Today + 7  
Today - 7  
Today + 30  
Today - 30

Finish & View Cancel



» Filter Configuration

(	Field Name *	Operator *	Compare With *	)	Runtime
	Open Date	<=	System Field	Start of year	<input type="checkbox"/>
+ ADD					

AND or OR option allows to add more than one criteria. You can delete a criteria by clicking the delete icon.

» Filter Configuration

(	Field Name *	Operator *	Compare With *	)	Runtime
	Open Date	<=	System Field	Start of year	<input type="checkbox"/>
AND	Choose one				<input type="checkbox"/>
AND					<input type="checkbox"/>
OR					<input type="checkbox"/>

12. Drill down Configuration allows user to have drill down report with required fields. Select the columns from the Data source field list box and click button  to move them to Columns list box. Click the  button if you want to remove any column from the Columns list box.

» Drill-Down Configuration

Datasource Field(s)	Select Field(s)
Id	Id
Short Description	Id
Symptoms	Short Description
Client Name	Symptoms
Open Date	Client Name
Category	Open Date
Sub-Category	Category
Item	Sub-Category
Priority	Item

« Back Finish & View Cancel

13. Finally click on **Finish & View** to view the report.

» Drill-Down Configuration

**Datasource Field(s)**

Search

- Id
- Short Description
- Symptoms
- Client Name
- Open Date
- Category
- Sub-Category
- Item
- Priority

**Select Field(s)**

- Id
- Short Description
- Symptoms
- Client Name
- Open Date
- Category
- Sub-Category
- Item

« Back Finish & View Cancel



Enter ticket number and search...

**ADiTaaS** **Monthly Incident Ticket Trend** Action 50

Id	Short Description	Symptoms	Client Name	Open Date	Category	Sub-Category
Requestor Name: David Cantrell						
Priority: P2						
IN-201117-0040	Outlook is not working. Unable to send mails	Outlook is not working. Unable to send mails	Allied	11/17/2020 16:58:27	SOFTWARE	OUTLOOK
IN-201117-0008	Application Slowness Issue, Application Name:...	Application Slowness Issue, Application Name:...	Allied	11/17/2020 12:39:27	SOFTWARE	APPLICATION
Priority: P4						
IN-200709-0041	Unlock the AD Account	Unlock the AD Account	Allied	07/09/2020 11:14:17	SOFTWARE	ACTIVE DIRECTORY
IN-200709-0056	Unlock the AD Account	Unlock the AD Account	Allied	07/09/2020 12:19:45	SOFTWARE	ACTIVE DIRECTORY
IN-200709-0054	Unlock the AD Account	Unlock the AD Account	Allied	07/09/2020 11:40:24	SOFTWARE	ACTIVE DIRECTORY
IN-200709-0039	Unlock the AD Account	Unlock the AD Account	Allied	07/09/2020 11:12:35	SOFTWARE	ACTIVE DIRECTORY
Requestor Name: Deepak Shukla						
Priority: P2						
IN-201208-0004	Application Slowness Issue, Application Name:...	Application Slowness Issue, Application Name:...	Allied	12/08/2020 10:07:15	SOFTWARE	APPLICATION
IN-201102-0004	Outlook is not working. Unable to send mails	Outlook is not working. Unable to send mails	Allied	11/02/2020 18:22:57	SOFTWARE	OUTLOOK
IN-201117-0079	Printer paper Jam, Printer Name:HP	Printer paper Jam, Printer Name:HP	Allied	11/18/2020 00:04:06	HARDWARE	PRINTER
Priority: P4						
IN-201117-0096	Printer paper Jam, Printer Name:Epson L3152	Printer paper Jam, Printer Name:Epson L3152	Allied	11/18/2020 00:15:27	HARDWARE	PRINTER
Count: 1347						

1 - 50 of 1347 items

### To generate a matrix report

- Matrix reports provide the data in a grid manner (m x n format). Select **Report type as Matrix Reports** and depend on selected report type column configuration will be changed.
- Select the columns from the Data source field list box and click button  to move them to Columns Fields, Pivot Fields, and Value Id and Group BY box. Click the  button if you want to remove any column from the Columns list box.
- There are action available at column field level to **Rename, Remove, Sort** and get a **Row count** or **distinct count**.
- Finish rest of the configuration and click on **Finish & View**

» Columns Configuration

**Datasource Field(s)**

- Assignment Group
- Assigned To
- Contact Name
- Location
- Opened By
- Last Modified By
- Alt. Location
- Channel
- Resolved On

**Column Field(s) \***

- Category

**Pivot Field(s) \***

- Status

**Value Field(s) \***

- Count of Id (Count)

**Group By**

- Location

**AdiTaaS** CONQUERING COMPLEXITY Incident Status By Category Action ▾

Category ▾	RESOLVED ▾	OPEN ▾	ASSIGNED ▾	CLOSED ▾	REJECTED ▾	PROGRESSING ▾	APPROVED ▾	PEND CLIENT ▾	PEND 3rd PARTY ▾	UNDER OBSERVATI
Location: Andheri										
SOFTWARE		1		1						
HARDWARE		2					1			
PHONE				1						
Location: Mahape										
HARDWARE	1	512	1	84	1	12	14		1	
SYSTEM		2		1						
SOFTWARE	36	834	2	139	17	17	6	1		1
IT SERVICES		2				2	2			
PHONE		35		8		5				
N/A		10								
Location: N/A										
<b>Total</b>	<b>37</b>	<b>1403</b>	<b>3</b>	<b>234</b>	<b>20</b>	<b>37</b>	<b>25</b>	<b>1</b>	<b>1</b>	<b>1</b>



1 - 14 of 14 items

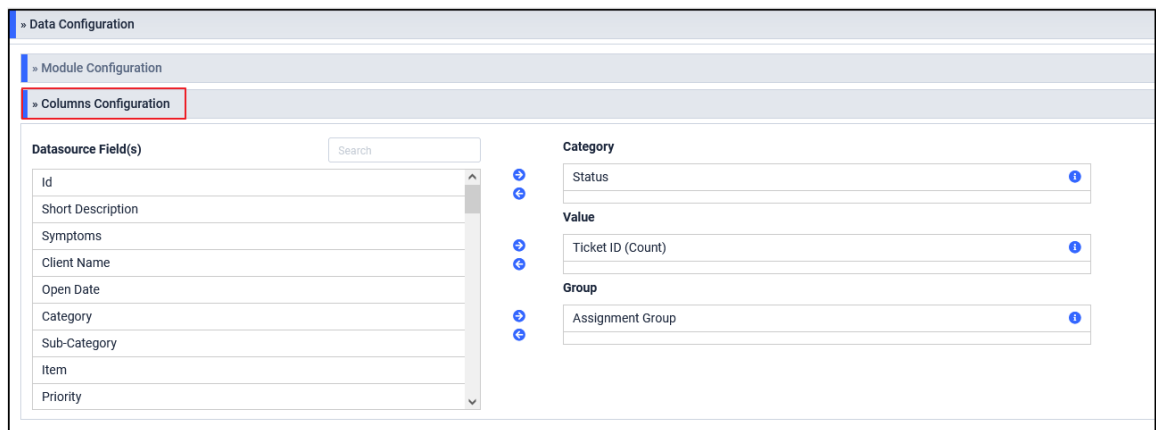
**AdiTaaS** CONQUERING COMPLEXITY Incident Status By Category Action ▾

Category ▾	RESOLVED ▾	OPEN ▾	ASSIGNED ▾	CLOSED ▾	REJECTED ▾	PROGRESSING ▾	APPROVED ▾	PEND CLIENT ▾	PEND 3rd PARTY ▾	UNDER OBSERVATI
Location: Andheri										
SOFTWARE		1		1						
HARDWARE		2					1			
PHONE				1						
Location: Mahape										
HARDWARE	1	512	1	84	1	12	14		1	
SYSTEM		2		1						
SOFTWARE	36	834	2	139	17	17	6	1		1
IT SERVICES		2				2	2			
PHONE		35		8		5				
N/A		10								
Location: N/A										
<b>Total</b>	<b>37</b>	<b>1403</b>	<b>3</b>	<b>234</b>	<b>20</b>	<b>37</b>	<b>25</b>	<b>1</b>	<b>1</b>	<b>1</b>

1 - 14 of 14 items

### To generate Summary Reports

- Summary reports are detailed reports that allow you to list your data based on certain criteria. Select **Report type as Summary Reports** and depend on selected report type column configuration will be changed.
- Select the columns from the Data source field list box and click button  to move them to Category, Value and Group box. Click the  button if you want to remove any column from the Category, Value and Group box.
- There are action available at column field level to **Rename**, **Remove**, **Sort** and get a **Row count** or **distinct count**.



The screenshot shows the 'Data Configuration' interface. The 'Columns Configuration' section is active. On the left, under 'Datasource Field(s)', there is a search box and a list of fields: Id, Short Description, Symptoms, Client Name, Open Date, Category, Sub-Category, Item, and Priority. On the right, there are three sections: 'Category' with 'Status', 'Value' with 'Ticket ID (Count)', and 'Group' with 'Assignment Group'. Blue arrow icons are positioned between the field list and the configuration sections, indicating the ability to move fields.

- Summary report facilitates to configure color configuration for charts. Navigate to color configuration wizard and click on Add to additional colors.

» Data Configuration













» Module Configuration

» Columns Configuration

» Filter Configuration

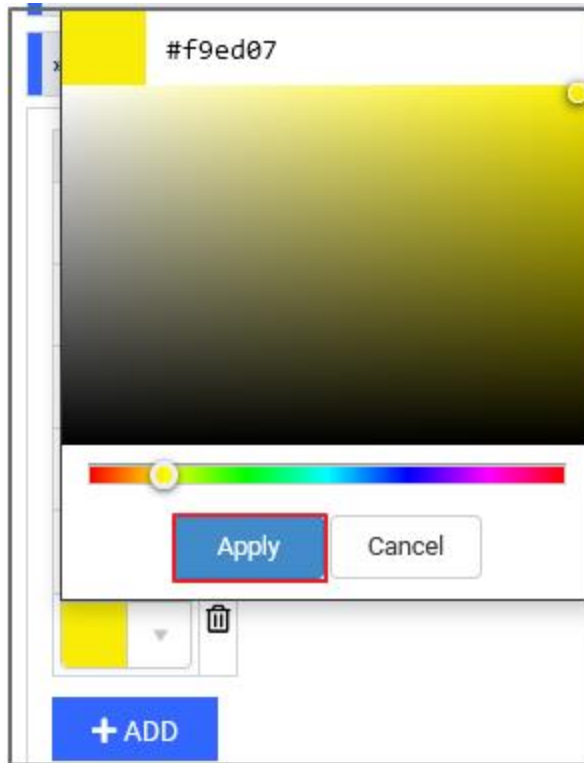
» Color Configuration

**Color Option**

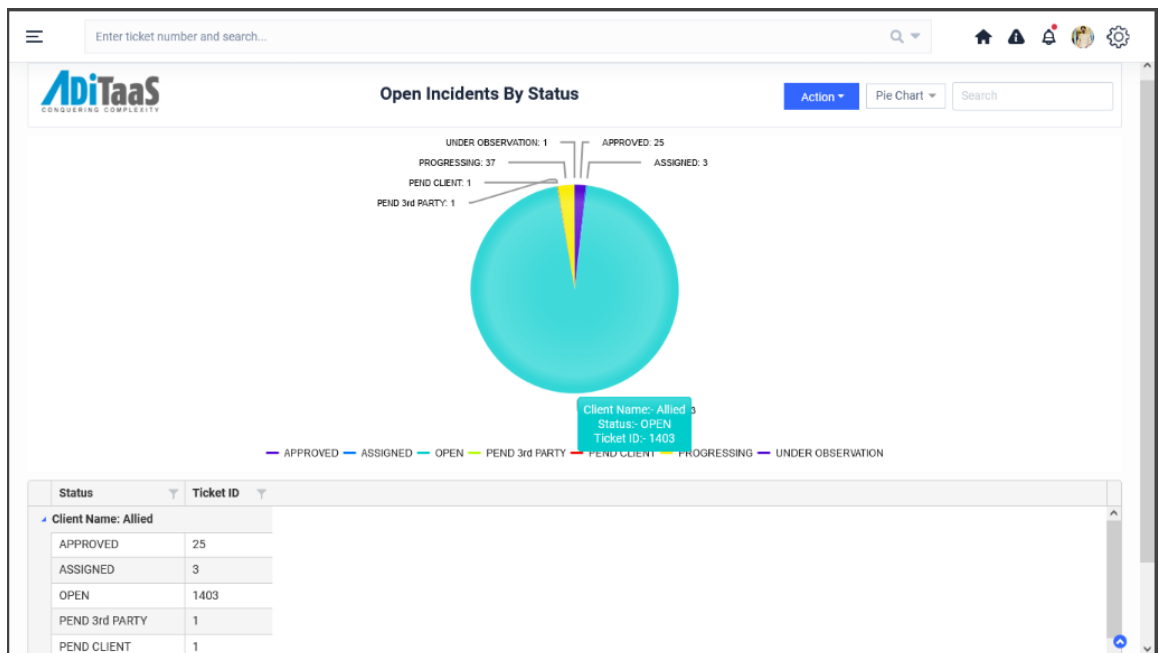
	▼	
	▼	
	▼	
	▼	
	▼	
	▼	

**+ ADD**





- Finish rest of the configuration and click on **Finish & View**.



### To generate Advance Summary Reports

- Advanced Summary reports are more detailed and customized reports that allow you to list your data based on certain criteria. Select **Report type as Advance Summary Reports** and select the chart type. Depend on selected report type column configuration will be changed.

**Report Type \***

Tabular Report
  Matrix Report
  Summary Report
  Advance Summary Report

**Advance Chart Type \***

- Bar Chart
- Column Chart
- Bar Chart**
- Bubble Chart
- Radar Chart
- Waterfall Chart

- Select the columns from the Data source field list box and click button to move them to Axis, Value, and Group and Stack box. Click the button if you want to remove any column from the Axis, Value, and Group and Stack box.
- There are action available at column field level to **Rename, Remove, Field Format, Sort** and get a **Row count** or **distinct count**.

**Columns Configuration**

**Datasource Field(s)**

Id  
Short Description  
Symptoms  
Client Name  
Open Date  
Category  
Sub-Category  
Item  
Priority

**Axis \***

Open Date (MM-yyyy)

**Value \***

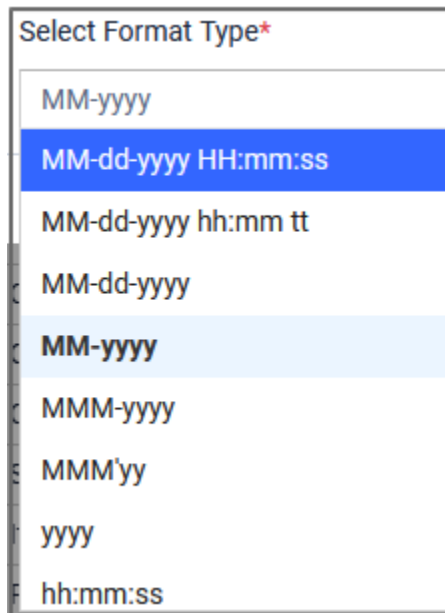
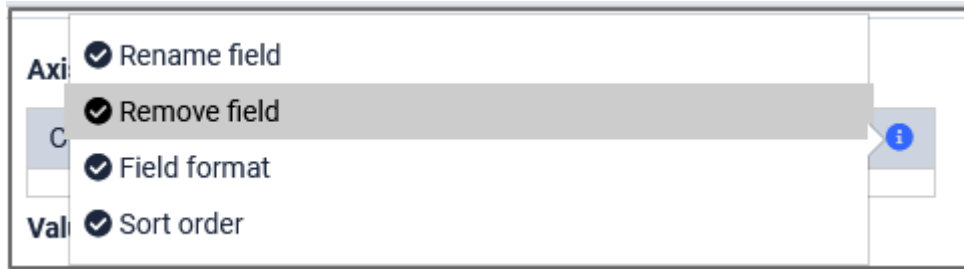
Count of Id (Count)

**Group**

**Stack**

Category

**Tooltips**



- Advanced Summary report facilitates to configure color configuration for charts. Navigate to color configuration wizard and click on Add to additional colors.

» Data Configuration













» Module Configuration

» Columns Configuration

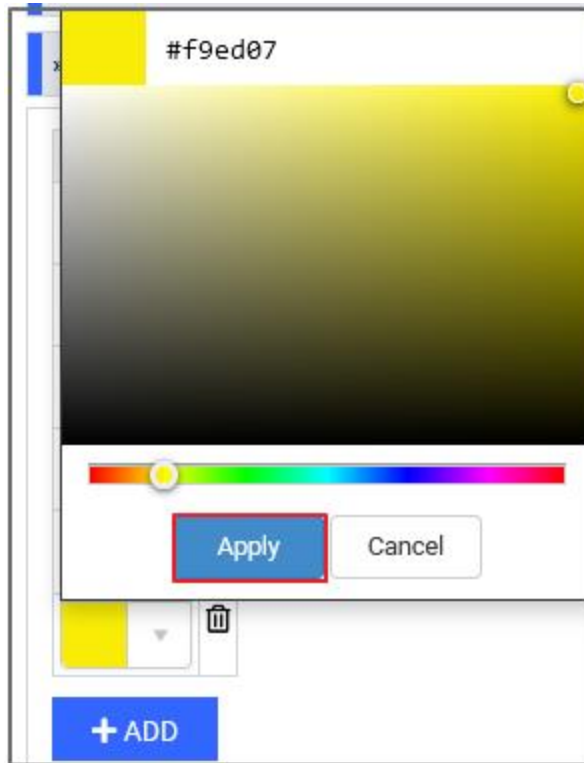
» Filter Configuration

» Color Configuration

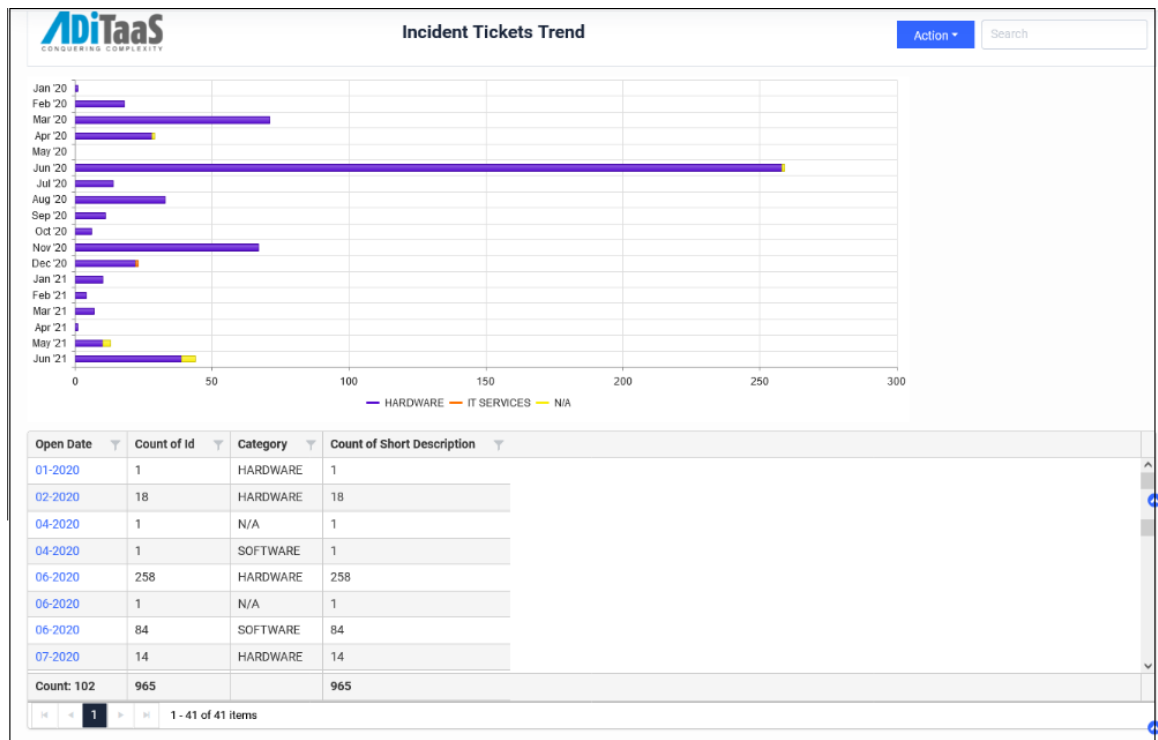
**Color Option**

	▼	
	▼	
	▼	
	▼	
	▼	
	▼	

**+ ADD**



- Finish rest of the configuration and click on **Finish & View**.

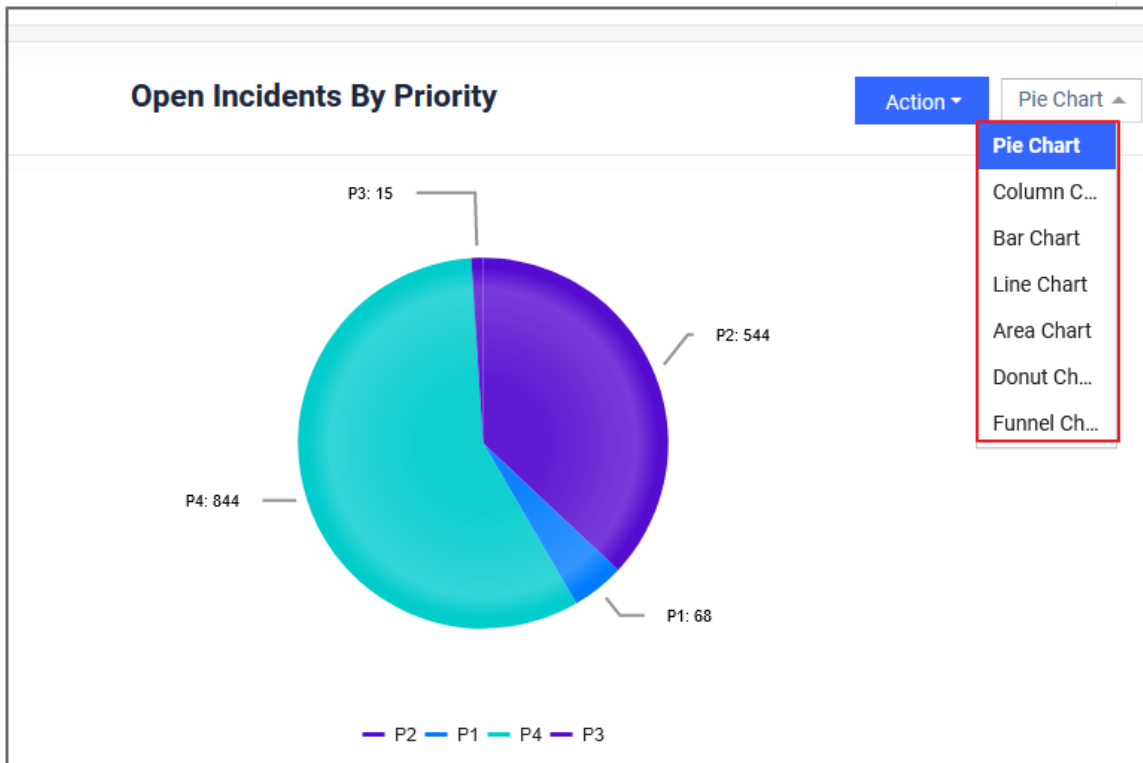


Drill down option is enabled in all graphical reports. Clicking on graph, page will display drill down report and clicking on specific ticket will take to the next level to view the real ticket data.

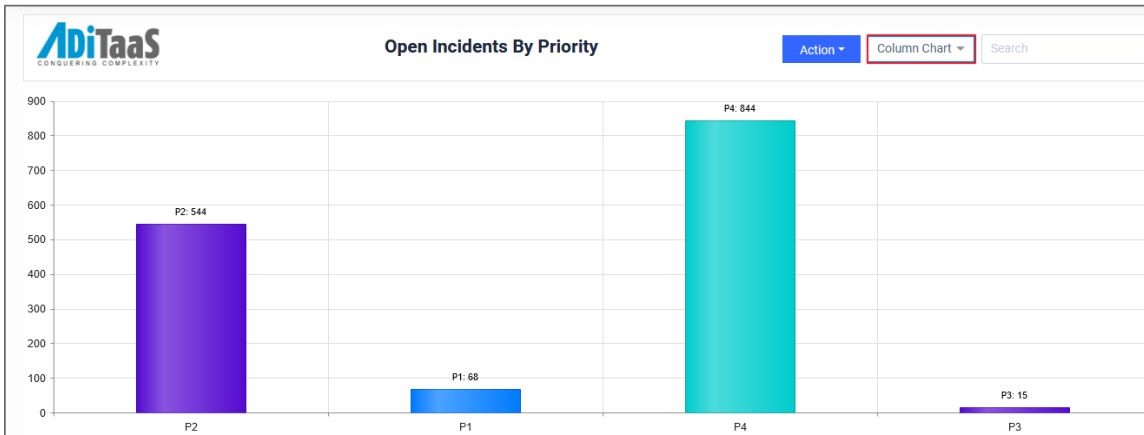
### Change Chart Type

Tool Facilitates to change the chat and modifications can be seen on real time.

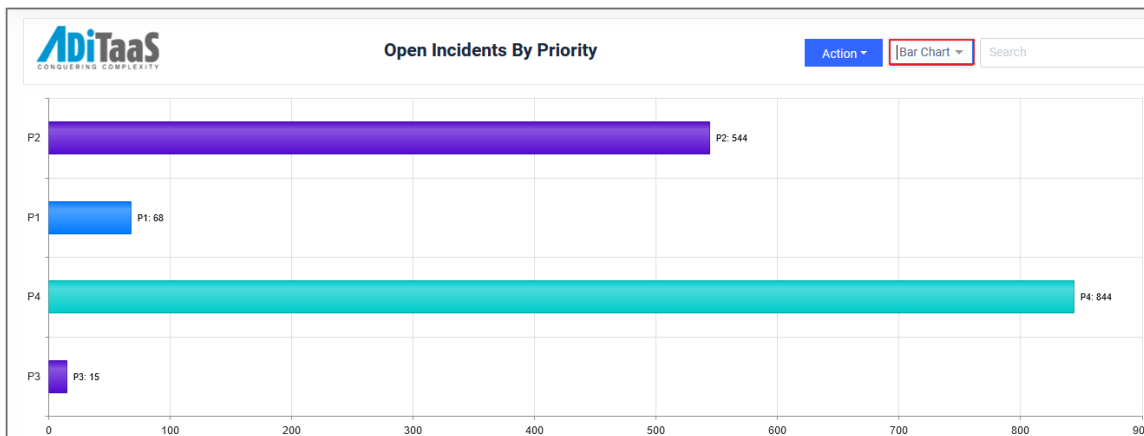
### Pie Chart



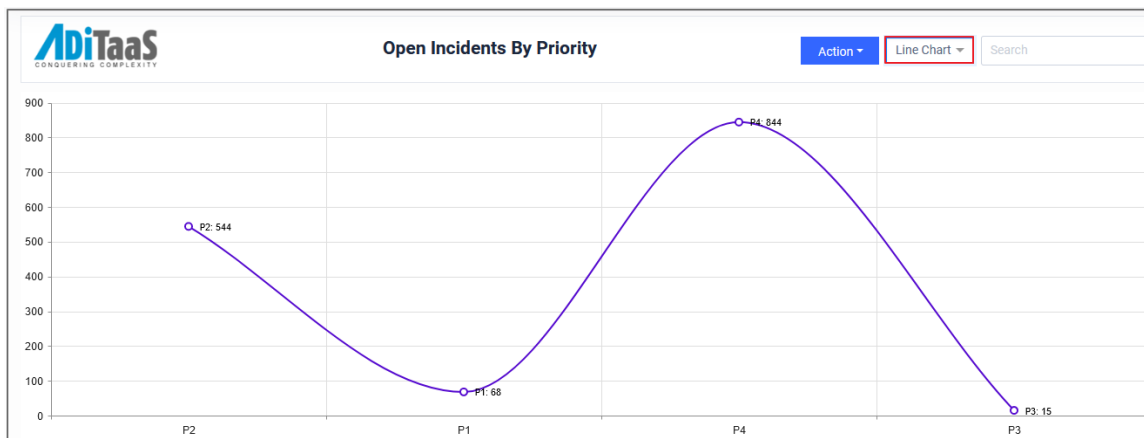
### Column Chart



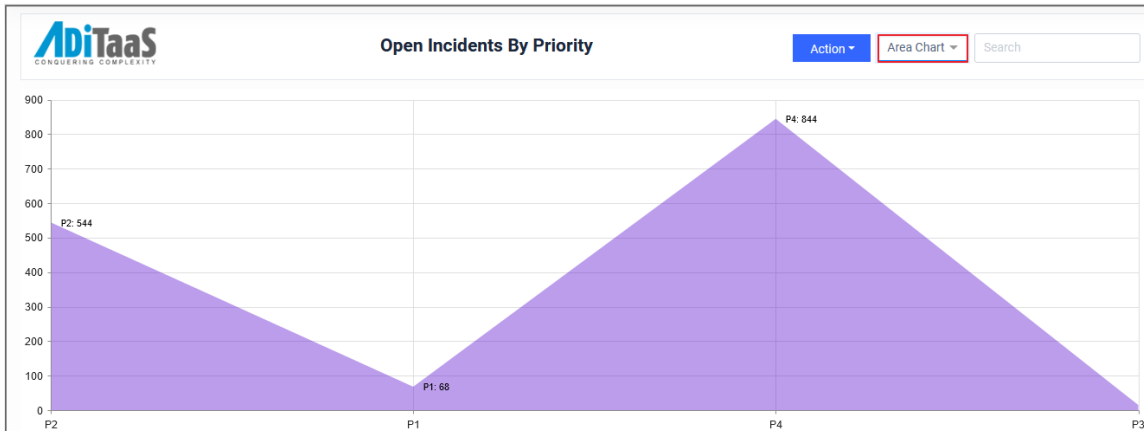
Bar Chart



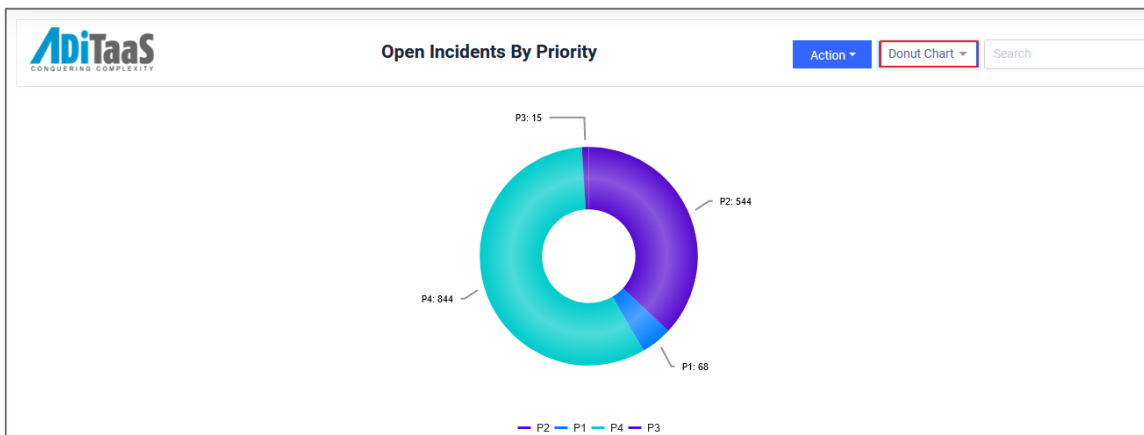
Line Chart



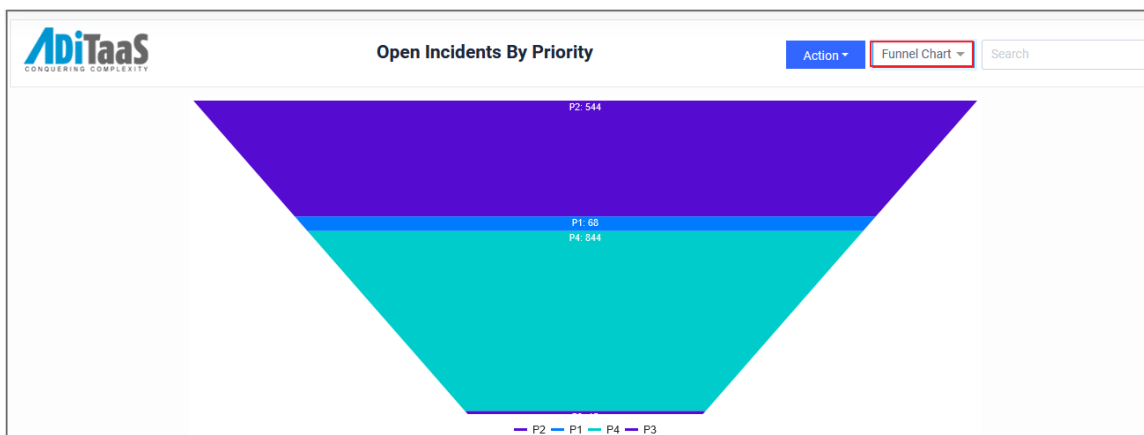
Area Chart



Donut Chart



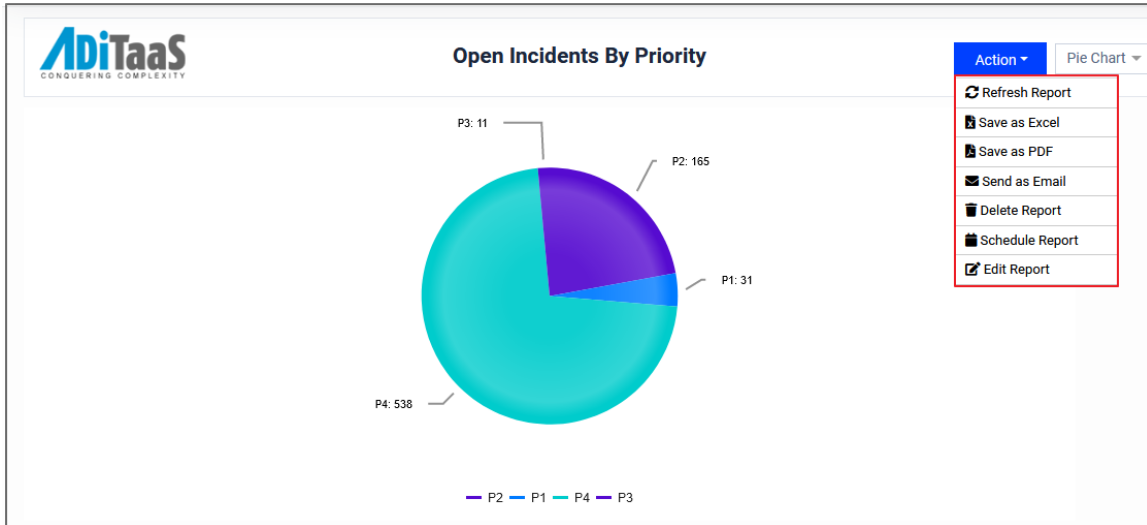
Funnel Chart



## REPORT- ACTIONS

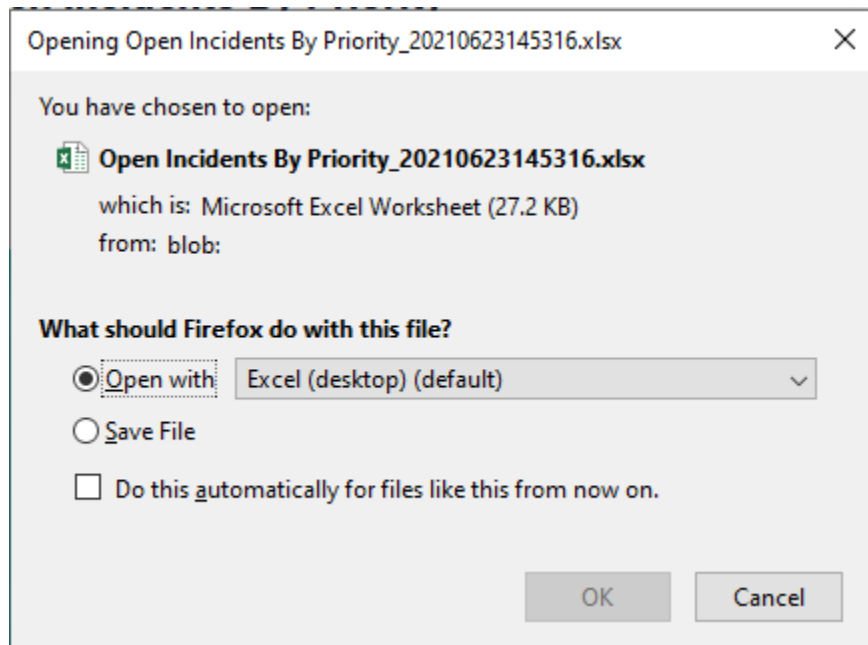
There are various actions can be performed on configured report.

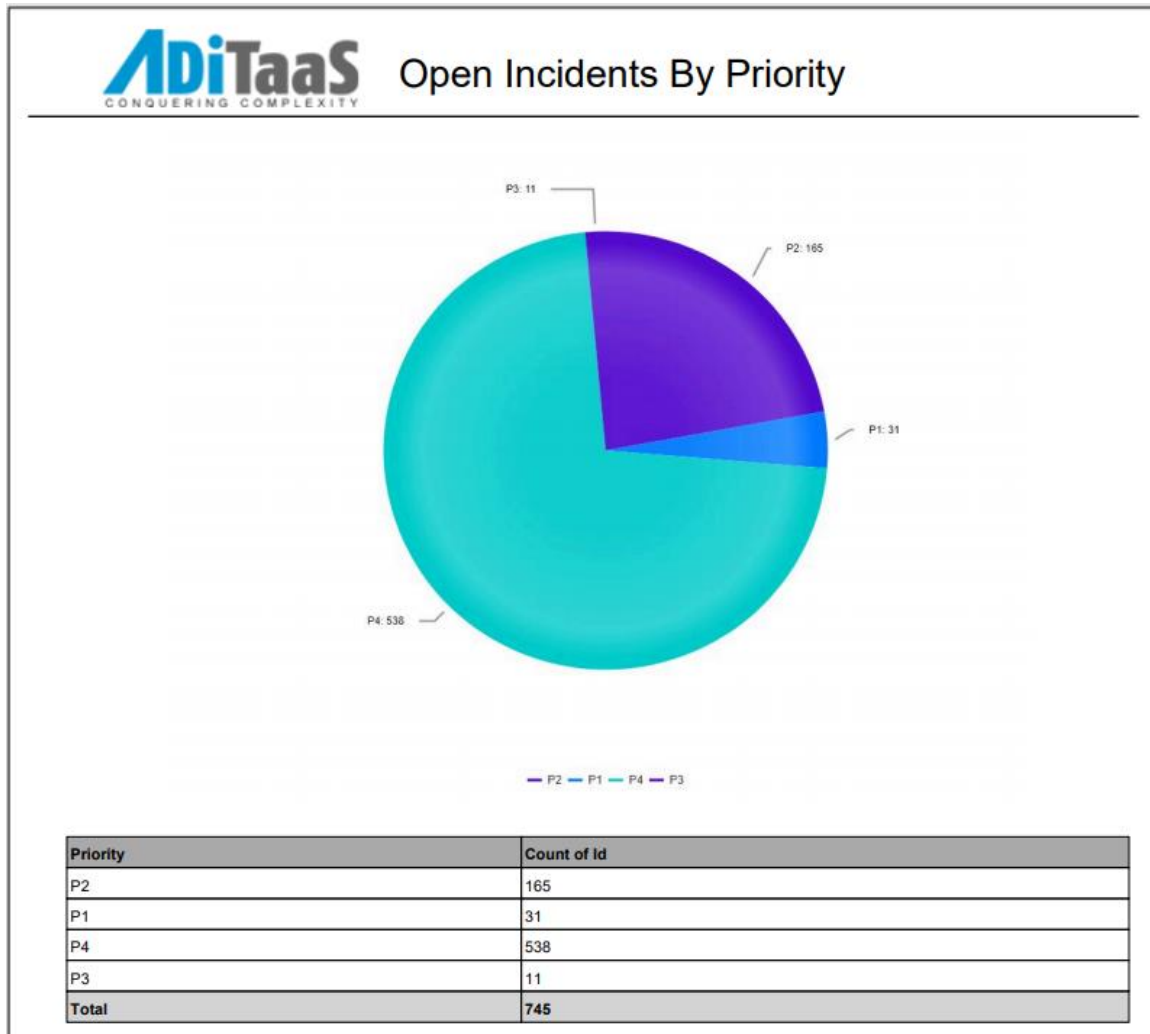




**REFRESH REPORT-** Report can be refreshed by clicking on Refresh Report.

**SAVE AS EXCEL/PDF-**You can export report in Excel.PDF.





**SEND AS EMAIL**- You can email reports to specified users by selecting the **Send as Email** option.

- Open the corresponding report that you wish to mail as an attachment.
- Click on **Send as Email** option under Action menu.
- Select the report format.
  - **Excel** -The underlying data will be sent as an excel file.
  - **PDF** – The underlying data will be sent as a PDF file.
- Enter email recipients details in **To** and **CC**. You can also add external email ids.
- Enter the Subject and Message
- Click on **Send Email**

**DELETE REPORT-** If report is no longer required, then remove it by selecting delete report

**REPORT SCHEDULAR-** Scheduled report is a report that is sent out by email at specified times. You can specify what is included; who should get the report; and how often it will be sent.

Id	Name	Schedule Type	Report Name
<a href="#">RPTSCH-210610-0001</a>	Monthly Incident Report	Monthly	ALL Incidents
<a href="#">RPTSCH-210108-0002</a>	Daily Report	Daily	Open Incidents
<a href="#">RPTSCH-210108-0001</a>	Daily Report	Daily	Open Incidents By Priority

### Schedule Report/New Scheduler

**Scheduled report can be configured from 2 ways.**

- ✚ Open the corresponding report that you wish to mail as an attachment.
  - Click on Action → **Schedule Report**

- ✚ Navigate to Reporting Module from left menu bar
    - Click on Report Scheduler, displays all configured report scheduler list
    - Click on Action → **New Scheduler**
1. On clicking, New scheduler page will be displayed
  2. Specify the relevant Scheduler Name in the given text field. This is a mandatory field.
  3. Select the Report that required to be scheduled from drop down list, the list will display all the available reports.  
If scheduler action is selected from configured report then the **Report Name** will be auto populated.
  4. Select the Export Format
    - **Excel** -The underlying data will be sent as an excel file.
    - **PDF** – The underlying data will be sent as a PDF file.
  5. Enter the scheduler, report can be scheduled on daily, weekly, bi-weekly, monthly, quarterly or yearly basis as per the requirement.

**New Report Schedule** Submit

Scheduler Name \*  Report Name \*  Export Format \*

Once **Daily** Weekly Monthly

Schedule On \*

6. To generate reports on a daily basis click Daily Report button and specify the From Date, Time, report to be scheduled.

**New Report Schedule** Submit

Scheduler Name \*  Report Name \*  Export Format \*

Once **Daily** Weekly Monthly

Schedule On Time \*

Start On  End On

- To generate weekly report click Weekly Report button. Specify the days of the week on which you want to generate reports by selecting the check box. Also specify the time, report to schedule.

The screenshot shows the 'New Report Schedule' form. At the top right is a blue 'Submit' button. The form contains the following fields and options:

- Scheduler Name \***: Text input field containing 'Daily Open Incidents Report'.
- Report Name \***: Dropdown menu showing 'Open Incidents By Priority (Incident)'.
- Export Format \***: Dropdown menu showing 'PDF'.
- Frequency**: A row of buttons: 'Once', 'Daily', 'Weekly' (highlighted in blue), and 'Monthly'.
- Schedule On Days \***: A grid of checkboxes for days of the week: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. All are currently unchecked.
- Schedule On Time \***: A text input field with a clock icon on the right.
- Start On**: A date picker field.
- End On**: A date picker field.

- To generate reports on a monthly basis click Monthly Report button. Specify the month on which the report has to be generated by enabling the check box. Also specify the time, report to schedule.

The screenshot shows the 'New Report Schedule' form. At the top right is a blue 'Submit' button. The form contains the following fields and options:

- Scheduler Name \***: Text input field containing 'Daily Open Incidents Report'.
- Report Name \***: Dropdown menu showing 'Open Incidents By Priority (Incident)'.
- Export Format \***: Dropdown menu showing 'PDF'.
- Frequency**: A row of buttons: 'Once', 'Daily', 'Weekly', and 'Monthly' (highlighted in blue).
- Schedule On Months \***: A grid of checkboxes for months: January, February, March, April, May, June, July, August, September, October, November, and December. All are currently unchecked.
- On Day \***: A dropdown menu showing 'Choose one'.
- On Time**: A text input field with a clock icon on the right.
- Start On**: A date picker field.
- End On**: A date picker field.

- Specify the E-mail ID of the person to whom the generated report has to be sent. Enter email recipients details in To and CC. You can also add external email ids.
- Enter the relevant **Subject** and **Message** for scheduler email
- Click on **Submit**

Enter ticket number and search...
🔍
🏠
🔔
👤
⚙️

### New Report Schedule Submit

Scheduler Name \*

Report Name \*

Export Format \*

Once Daily Weekly Monthly

Schedule On Time \*

Start On

End On

To Email \*

Cc

Subject \*

Message \*  

Paragraph

**B** *I*

Daily Open Incidents Report

Submit
Cancel

### View /Edit Report Scheduler

All scheduled reports will be visible under **Reporting** → **Report Scheduler**. To edit any report scheduler click on respective scheduler and perform the changes and click on **Submit**.

**Jagadeep Vudatha**  
Practice Manager

- Release
- Task
- Interaction
- CMDB
- ChatBot
- Live Chat
- Intergration Hub
- Visual Boards
- Reporting
  - Report Catalog
  - Report Scheduler
  - Create New

#### Report Scheduler List

Action
25
Search

<input type="checkbox"/>	Id	Name	Schedule Type	Report Name	Created On
<input type="checkbox"/>	<a href="#">RPTSCH-210610-0001</a>	Monthly Incident Report	Monthly	ALL Incidents for Pink Verify Demo	06/10/2021 09:59:35
<input type="checkbox"/>	<a href="#">RPTSCH-210115-0001</a>	Report	Daily	Closed Incidents by Category	01/15/2021 11:13:18
<input type="checkbox"/>	<a href="#">RPTSCH-210108-0002</a>	Daily Report	Daily	Open Incidents By Category	01/08/2021 15:31:38
<input type="checkbox"/>	<a href="#">RPTSCH-210108-0001</a>	Daily Report	Daily	Open Incidents By Priority	01/08/2021 13:46:29

1 - 4 of 4 items

## Delete Report Scheduler

1. Navigate to **Reporting module** from left menu bar
2. Click on **Report Scheduler**, Displays a list of all configured report schedulers
3. Select the relevant scheduled report that required to delete
4. Click on **Action → Delete Scheduler**
5. On clicking scheduler will be deleted.

The screenshot shows the 'Report Scheduler List' interface. On the left, the 'Reporting' menu is expanded, and 'Report Scheduler' is selected. The main content area displays a table with the following data:

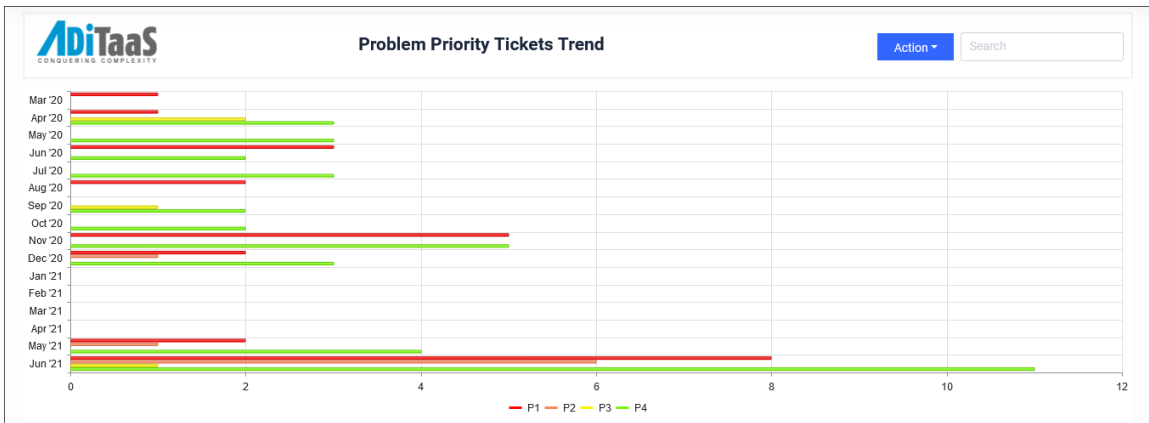
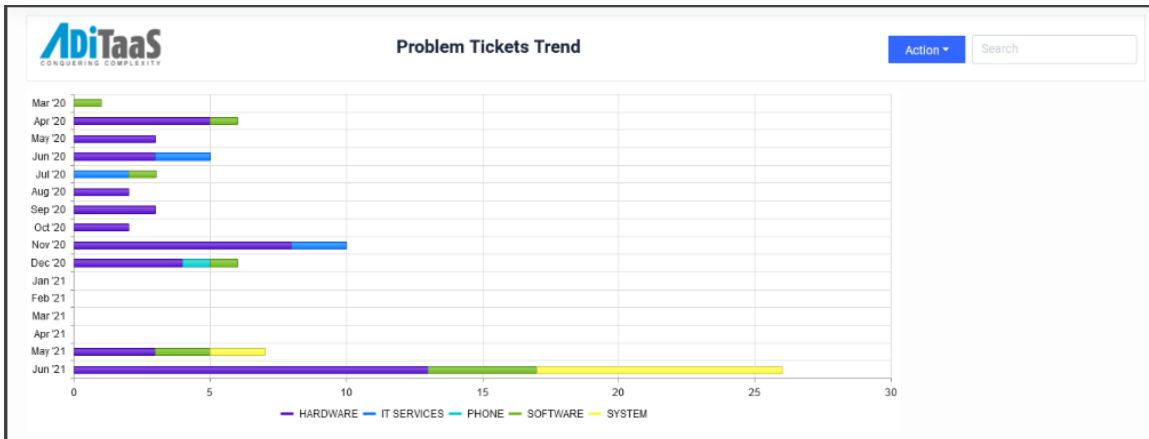
Id	Name	Schedule Type	Report Name
<a href="#">RPTSCH-210610-0001</a>	Monthly Incident Report	Monthly	ALL Incident
<a href="#">RPTSCH-210108-0002</a>	Daily Report	Daily	Open Incident
<a href="#">RPTSCH-210108-0001</a>	Daily Report	Daily	Open Incident

The 'Action' dropdown menu for the first row is open, showing the following options: New Scheduler, Delete Scheduler, Refresh, and Export To Excel. The 'Delete Scheduler' option is highlighted.

**EDIT REPORT-** By clicking on edit report any changes or modification can be performed on configured report. Make your changes to the fields, filters, and summaries that you'd like to modify, just as you would when creating a new report.

1. Navigate to **Reporting module** from left menu bar
2. Click on **Report Catalog**, Displays a list of all configured reports
3. Select the relevant report that required to modify
4. Click on **Action → Edit Report**
5. Perform the modification and click on **Finish & View**.

## SAMPLE REPORTS



## Report on category and queue change count

### All Problems

ID	Problem Description	Requestor Name	Category Change Count	Queue Change Count	Category	Sub Category	Item	It
PR-200410-0001	Intermittent network connection	Jagadeep Vudatha	1	1	HARDWARE	REPLACEMENT	MACHINE SHIFT	M
PR-200511-0008	Intermittent network connection	Leah Bostic	1	1	HARDWARE	REPLACEMENT	MACHINE SHIFT	M
PR-200511-0009	Intermittent network connection	Deepak Shukla	1	1	HARDWARE	REPLACEMENT	MACHINE SHIFT	M
PR-200605-0001	sdgdfg	Jagadeep Vudatha	1	1	HARDWARE	REPLACEMENT	MACHINE SHIFT	F
PR-200605-0003	dfgh	Jagadeep Vudatha	1	1	HARDWARE	REPLACEMENT	MACHINE SHIFT	F
PR-200608-0002	sdfgsdfg	Jagadeep Vudatha	1	1	HARDWARE	REPLACEMENT	MACHINE SHIFT	L
PR-200611-0003	sdasda	Jagadeep Vudatha	1	1	IT SERVICES	AUDIO/VIDEO	SETUP VIDEO CONFERENCE	F
PR-200618-0001	Network is down	Priya Lewis	1	1	IT SERVICES	AUDIO/VIDEO	SETUP VIDEO CONFERENCE	L
PR-200709-0003	Unable to connect mail server	Priya Lewis	1	1	IT SERVICES	AUDIO/VIDEO	SETUP VIDEO CONFERENCE	L
PR-200709-0004	Unable to connect mail server	Priya Lewis	1	1	IT SERVICES	AUDIO/VIDEO	SETUP VIDEO CONFERENCE	L
PR-200728-0008	Scanner is not getting connect	Priya Lewis	1	1	SOFTWARE	ACTIVE DIRECTORY	ACCOUNT UNLOCK	L
PR-200825-0001	Intermittent Network Issue	David Cantrell	1	1	HARDWARE	REPLACEMENT	MACHINE SHIFT	L
Count: 74								



**AdiTaaS** CONQUERING COMPLEXITY **Problem Incident Trend (Tabular)** Action ▾ 50 ▾ Search

Incident Id	Incident Description	Opened On	Opened by	Contact Name	Status	Assignment Group
<b>Opened On: Nov-2020</b>						
<b>Id: PR-201110-0001</b>						
IN-210604-0005	Account Lockout	06/04/2021 10:06:30	Jagadeep Vudatha	Jagadeep Vudatha	OPEN	Service Desk
<b>Id: PR-201112-0003</b>						
IN-210610-0015	UNABLE TO INSTALL MS OFFICE	06/10/2021 12:22:30	Jagadeep Vudatha	Jagadeep Vudatha	PROGRESSING	Network Support
<b>Id: PR-201117-0001</b>						
IN-200901-0018	Outlook is not working. Unable to send mails	09/01/2020 20:06:36	Jagadeep Vudatha	Jagadeep Vudatha	PROGRESSING	Service Desk
IN-200910-0006	Outlook   User continues to get prompted for cr...	09/10/2020 11:01:58	Jagadeep Vudatha	David Cantrell	OPEN	Service Desk
<b>Id: PR-201120-0001</b>						
IN-201119-0014	Printer paper Jam, Printer Name:Epson L3152	11/19/2020 23:38:08	Jagadeep Vudatha	Jagadeep Vudatha	OPEN	Service Desk
IN-201119-0015	Printer Connection Issue, Printer Name:Epson ...	11/19/2020 23:38:29	Jagadeep Vudatha	Jagadeep Vudatha	OPEN	Service Desk
IN-201120-0003	Password Reset	11/20/2020 14:33:09	Jagadeep Vudatha	Jagadeep Vudatha	OPEN	Service Desk
<b>Count: 46</b>						

**AdiTaaS** CONQUERING COMPLEXITY **Top 5 Problem Category** Action ▾ 50 ▾ Search

Category	Count
SYSTEM	11
HARDWARE	46
IT SERVICES	6
SOFTWARE	10
PHONE	1
<b>Count: 5</b>	<b>74</b>

1 - 5 of 5 items

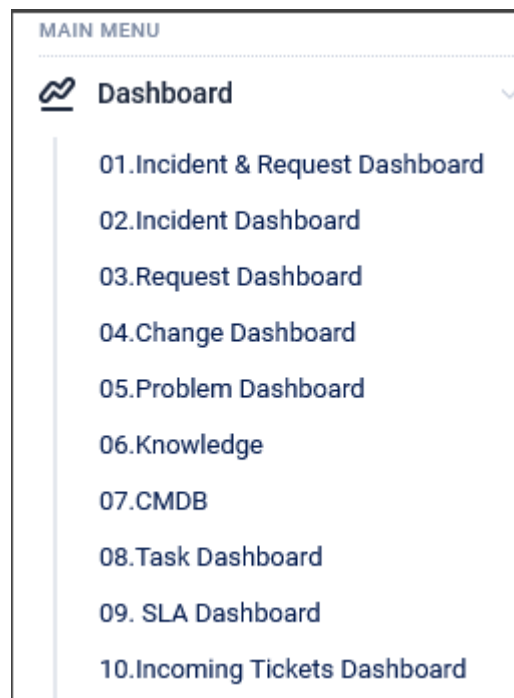
## Dashboards

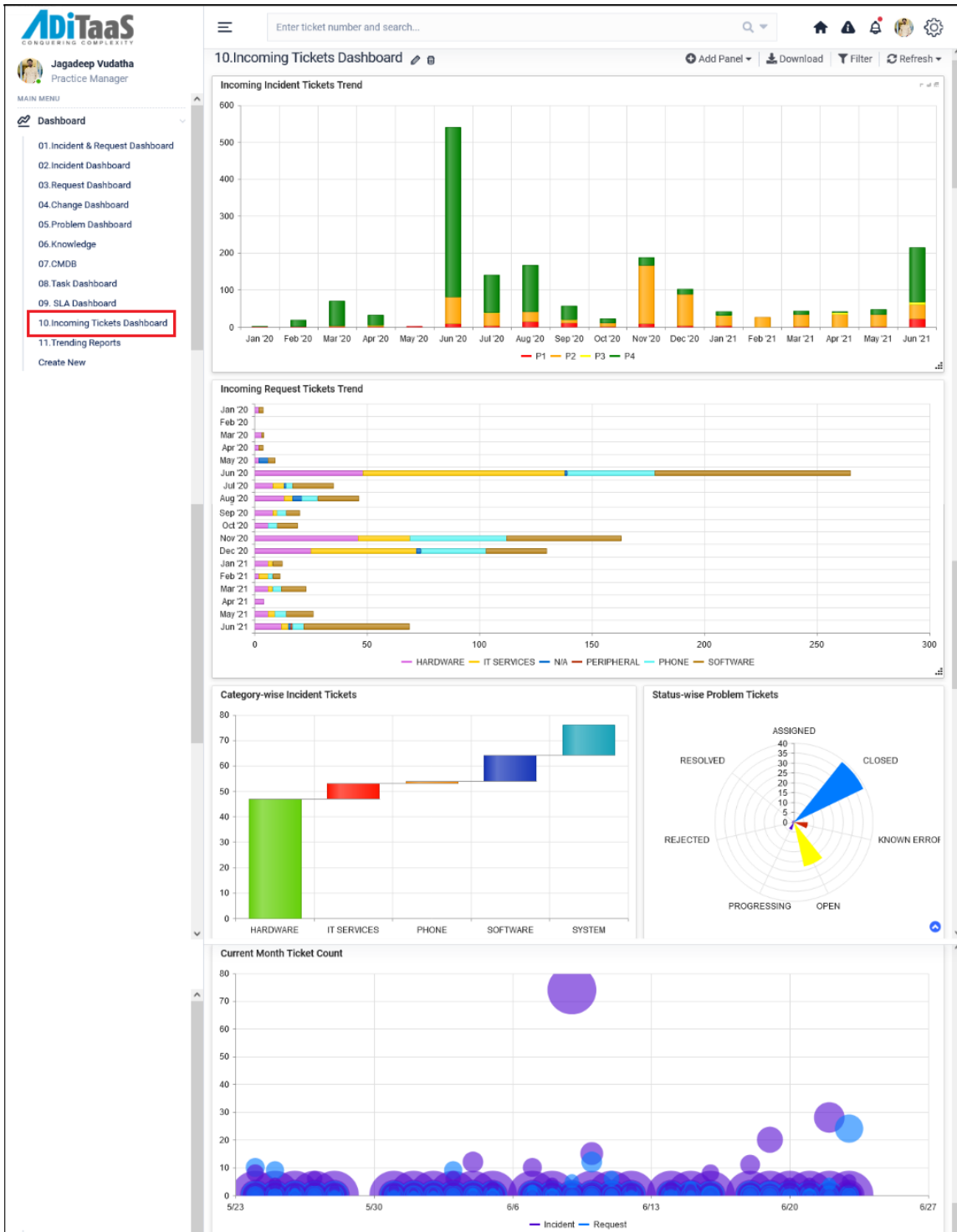
The Dashboard is a visual display of real-time information, consolidated and arranged in a single view so that it can be easily monitored. The Dashboard displays various statistical data related to number of incidents, requests, changes, problems and assets based on various criteria.

Dashboards enables to display multiple performance analytics, reporting, and other widgets on a single screen. Use dashboards to create multiple data reports that can be shared with multiple users.

### READY AVAILABLE DASHBOARDS

Along with creation of new dashboards, ready available dashboards are accessible for use.





## CREATE NEW DASHBOARD

1. Navigate to **Dashboard** from left menu bar
2. Click on **Create New**

**New Dashboard** [X]

**Title \***  
Dashboard Title

**Description**  
Description

**Module \***  
Dashboard

Set as Home Page

**Accessibility**  
 Private 
  Public 
  Specific Users

**Create** **Cancel**

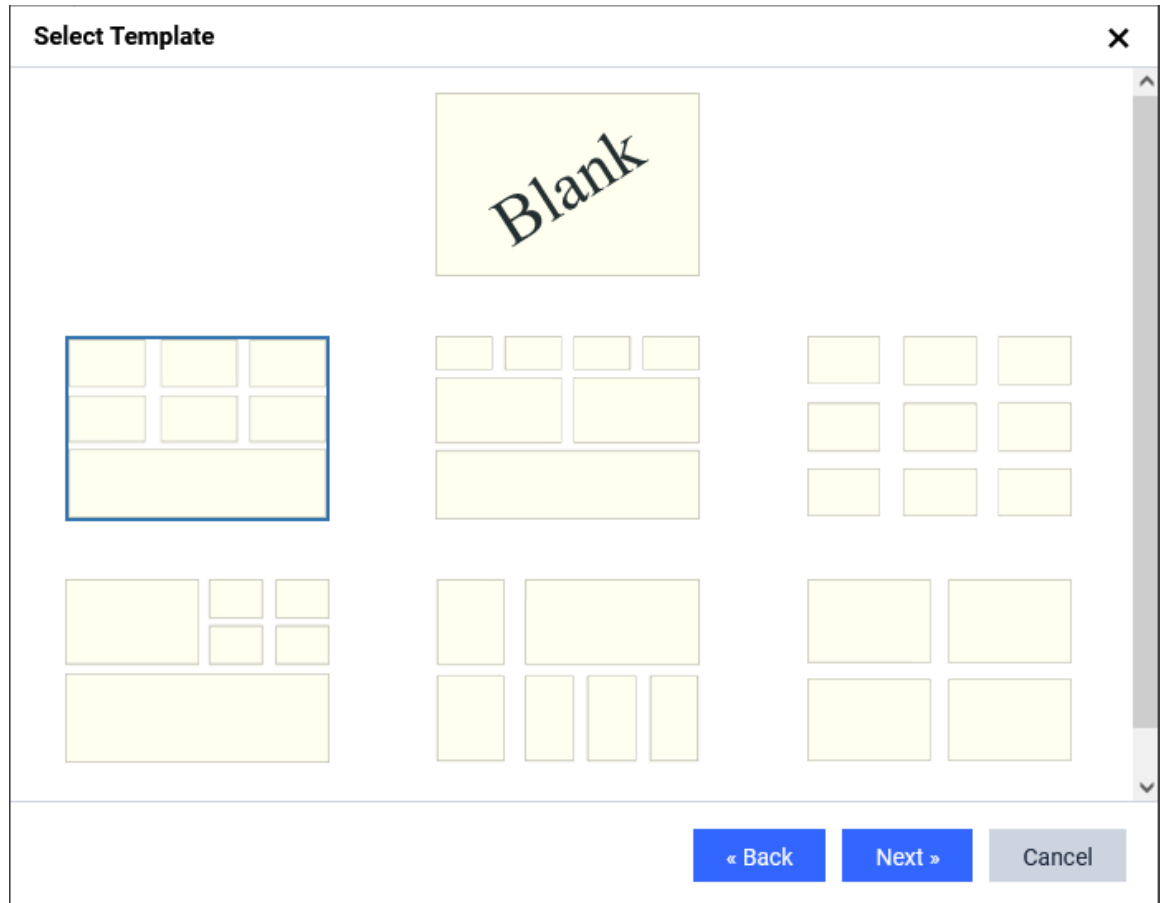
3. Specify the relevant **Title** for dashboard in the given text field. This is a mandatory field.
4. Select the **Module** Name from the drop down list under which you want to display the dashboard

**Module \***

- Dashboard
- Dashboard**
- Incident
- Request
- Change
- Problem**
- CMDB

5. Choose the **Accessibility** selecting the radio buttons. You can create **Private**, **Public** and **Specific Users**.
  - **Private**- Report will be visible only to the user who has created the report
  - **Public**- Report will be visible to all
  - **Specific Users** - Report will be visible only to the specified users

6. Click on **Create**
7. Tool facilitates list of Templates. Select the required **Template** from the list



8. Click on **Next**
9. Select required widgets from **Select Existing Panel** by clicking on checkbox. At a time multiple widgets can be selected from different modules.

### Select Existing Panel ✕

- » Incident
- » Request
- » Change
- » CMDB
- » Problem
- » Knowledge
- » Task

« Back
Finish
Cancel

### Select Existing Panel ✕

» Incident

Incident History Report Of Last 30 Days

Open Incident by Assignee

Resolved Incidents By Resolution Criteria

Open Incidents By Urgency

Open Incidents By Priority

Incidents By Channel

Incidents By Location

Managed Device Count by CI Type

Current Month Logged Incidents

Incident Logged Today

Priority wise Incident Tickets

Incidents Resolved Today

Total Incident Count

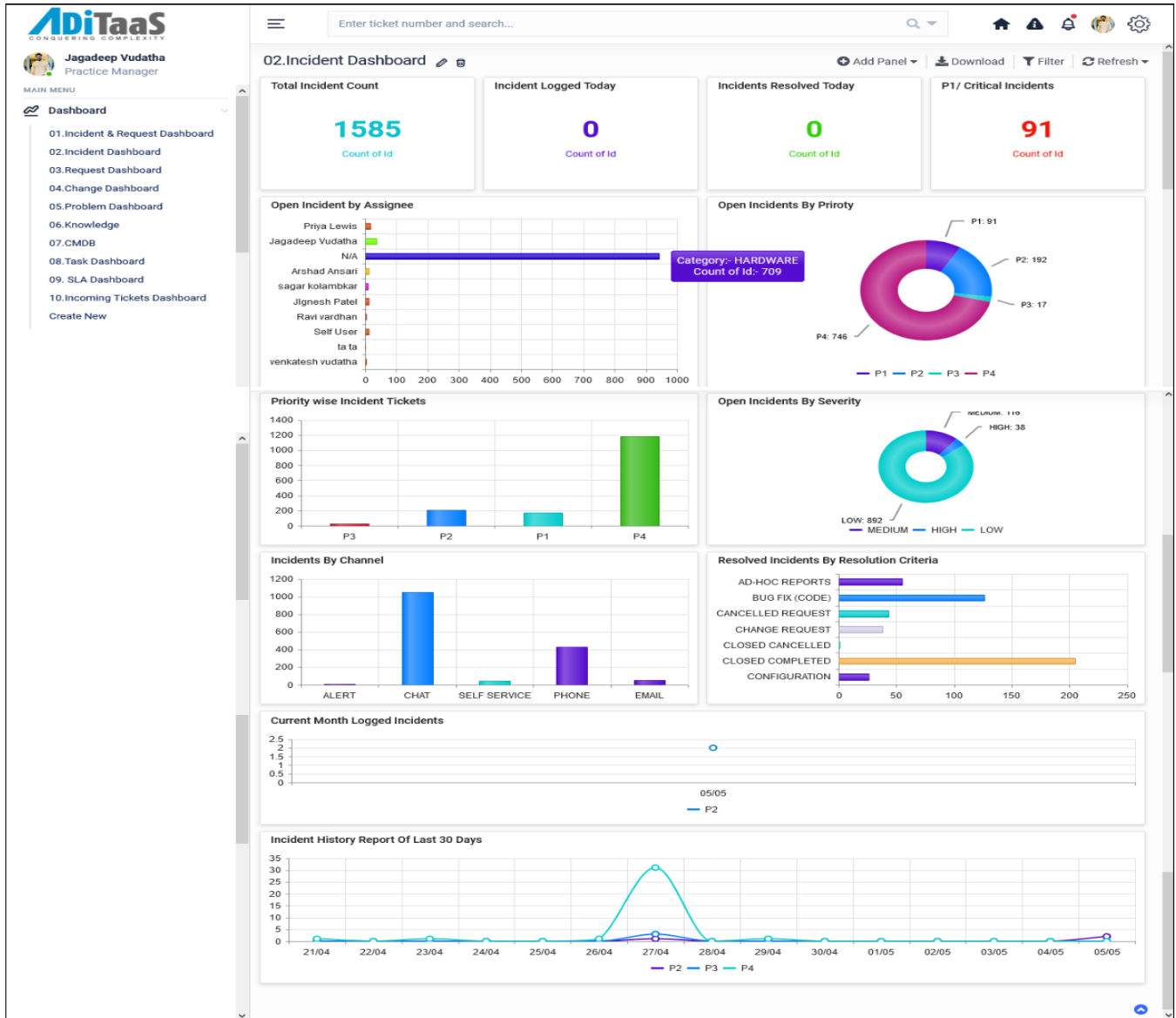
Resolved Incidents By Resolver

Unassigned Incidents

Open Incidents By Category Item

« Back
Finish
Cancel

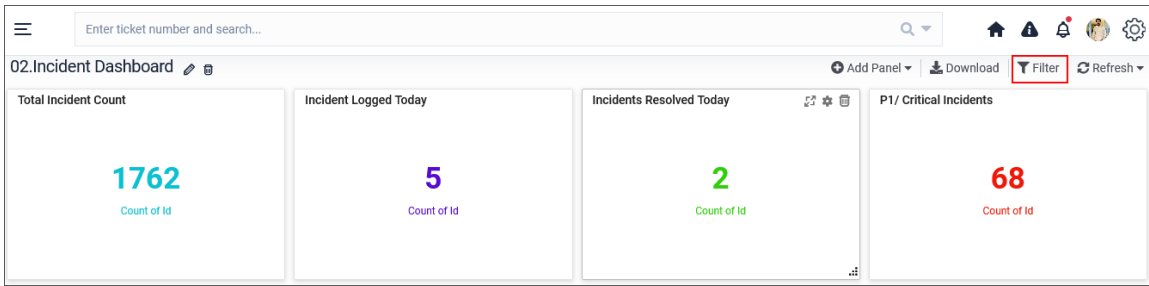
10. Click on **Finish**



## APPLY FILTER ON DASHBOARD

Click on Filter to apply specific conditions to dashboard widgets. User can apply any number of filter conditions.

1. Select the required **Field Name** from drop down list to apply the conditions.
2. Click on Add to add more conditions
3. Click on Submit.



**Dashboard Filter Option**

Field Name *	Operator *	Compare With *
Choose one		
Alt. Location		
Assigned To		
Assignment Group		
Category		
Category Change Count		
Cause By		
Channel		
CI Name		

Submit Cancel

**Dashboard Filter Option**

Field Name *	Operator *	Compare With *
Priority	Choose one	
	Equals	
	Not equals	
	In	
	Not in	
	Starting with	
	Ending with	
	Contains	
	Not contains	

+ ADD Submit Cancel

**Dashboard Filter Option**

Field Name *	Operator *	Compare With *
Priority	In	Choose one
		P1
		P2
		P3
		P4

+ ADD Submit Cancel

**Dashboard Filter Option**

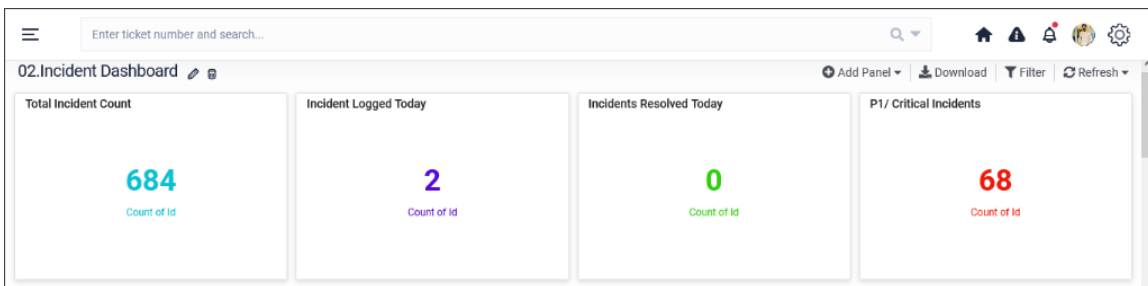
Field Name *	Operator *	Compare With *
Priority	In	P1 P2

+ ADD Submit Cancel



Click on **Delete** icon to remove the filter condition.

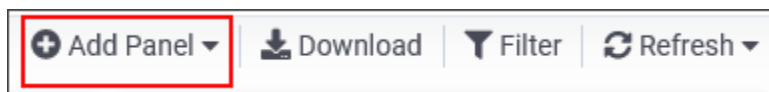
Dashboard values are changed according to the filter condition

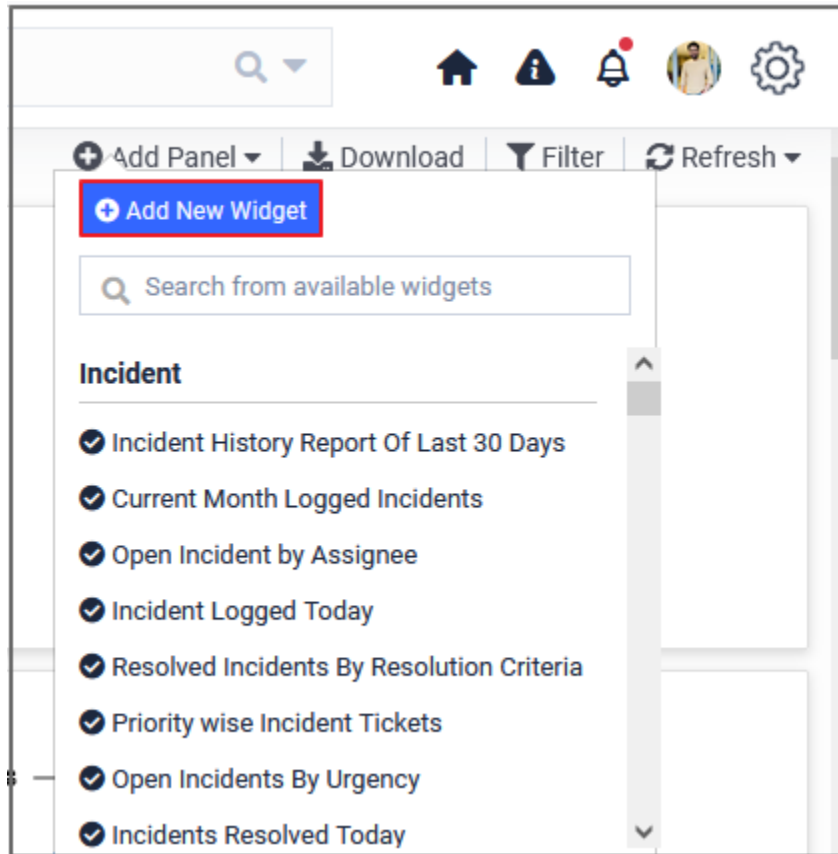


### APPLY A NEW WIDGET TO THE DASHBOARD

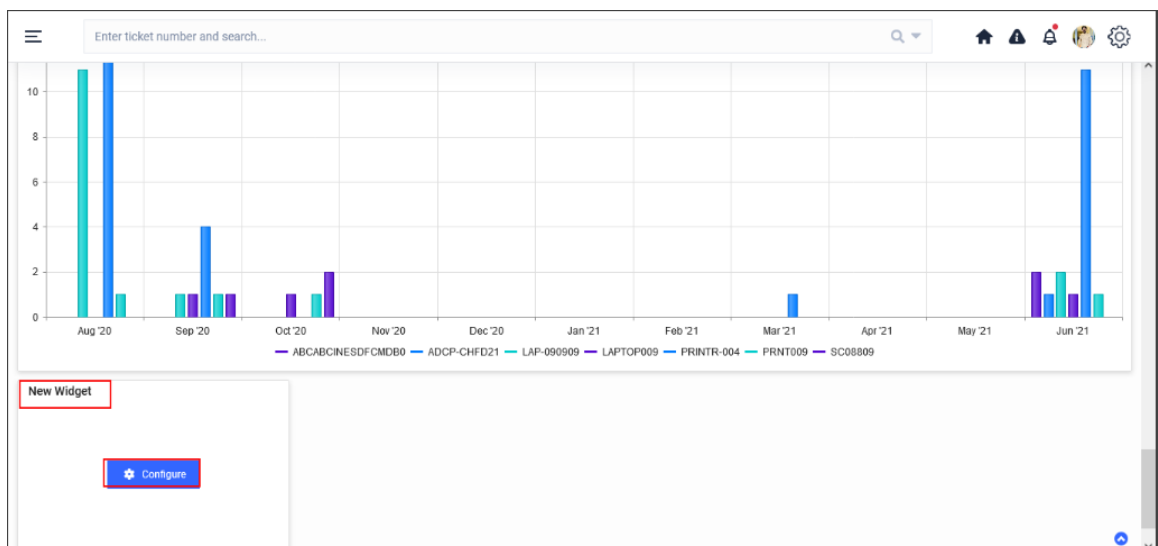
Tool provides a ready available widgets to add in dashboard.

1. Click on **Add Panel** from top dashboard action items
2. Tool enables you to create new widgets that meet your need if you are unable to find them from the list widgets already available. To create new widget click on **Add New Widget**
3. To add an existing widget to dashboard , click on any required widget name from the available list


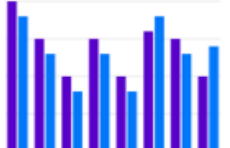


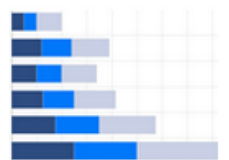
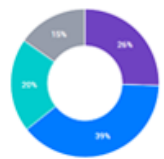






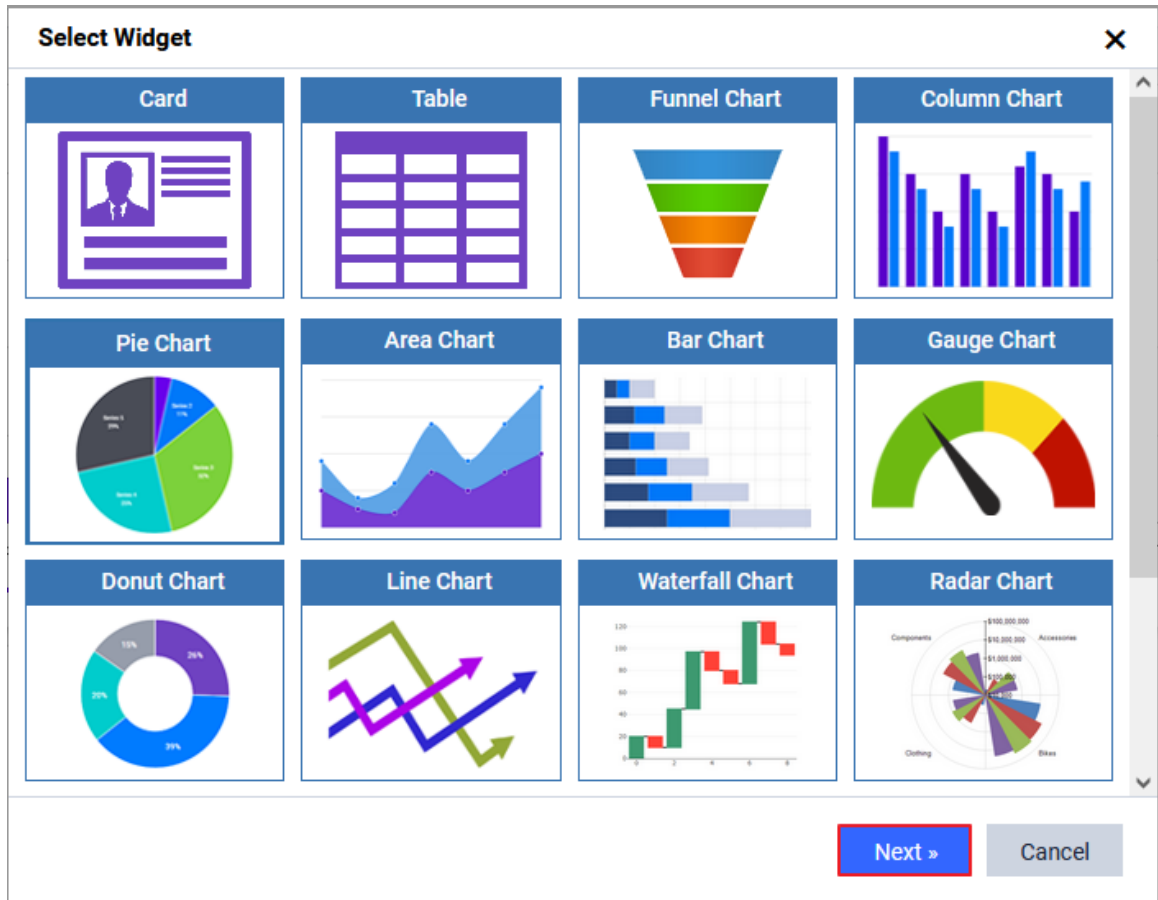
4. Upon clicking on **add new widget**, widget will be appear at the bottom of the page
5. Click on **Configure**, Displays a widget List
6. Select required widget to configure the chart



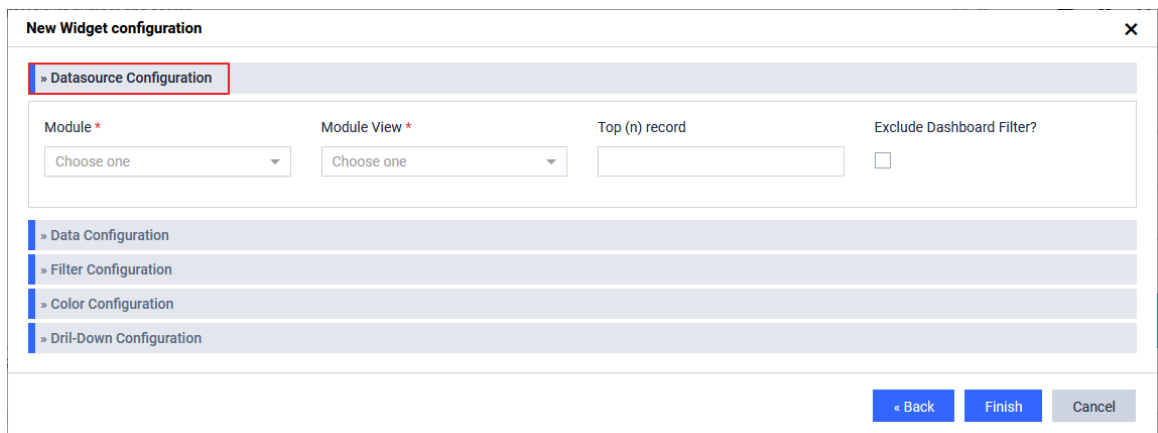
### Select Widget ✕

<b>Card</b>	<b>Table</b>	<b>Funnel Chart</b>	<b>Column Chart</b>
			
<b>Pie Chart</b>	<b>Area Chart</b>	<b>Bar Chart</b>	<b>Gauge Chart</b>
			
<b>Donut Chart</b>	<b>Line Chart</b>	<b>Waterfall Chart</b>	<b>Radar Chart</b>
			

Next »
Cancel



7. Click Proceed to Next >> button. This opens the Data Configuration Page.
8. In Data source Configuration, Choose the module (Incident, Request, Problem, Change and so on) for which you wish to create the widget.



**New Widget configuration**

» Datasource Configuration

Module \*      Module View \*      Top (n) record      Exclude Dashboard Filter?

Choose one      Choose one           

Archive Data

Incident

Request

Change

Problem

CMDB

Knowledge

Task

« Back      Finish      Cancel

---

**New Widget configuration**

» Datasource Configuration

Module \*      Module View \*      Top (n) record      Exclude Dashboard Filter?

Incident      Incident           

» Data Configuration

» Filter Configuration

» Color Configuration

» Drill-Down Configuration

« Back      Finish      Cancel

- Next navigate to Data Configuration page. This page differs for each widget type. Each widget type has to go through various steps generate a widget.

**New Widget configuration**

» Datasource Configuration

» Data Configuration

Datasource Field(s)      Search      Legends \*

Id      <      >

Short Description      <      >

Symptoms      <      >

Client Name      <      >

Open Date      <      >

Category      <      >

Sub-Category      <      >



Item      <      >

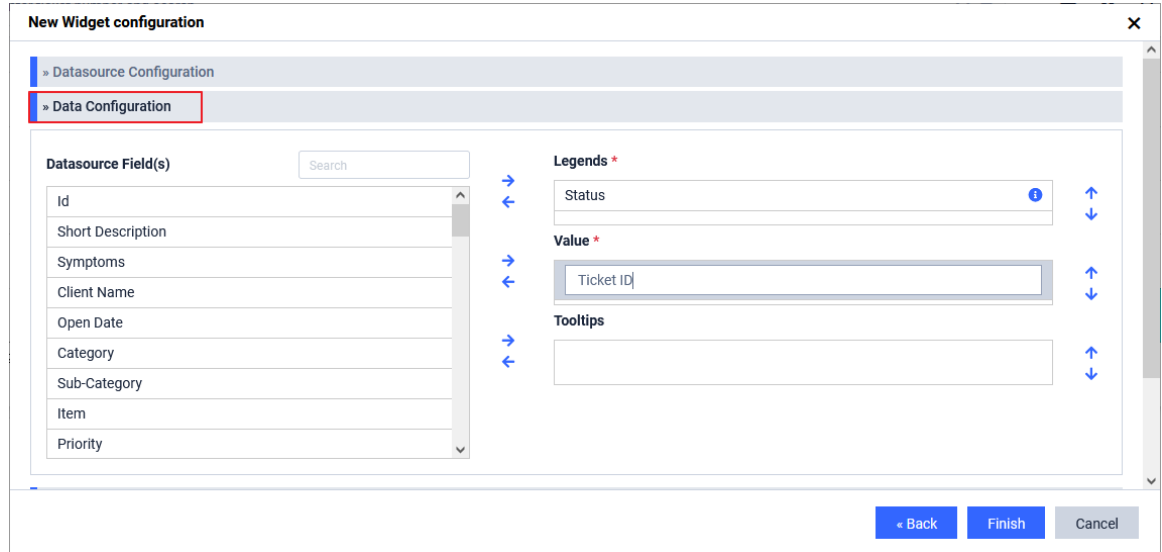
Priority      <      >

Value \*

Tooltips

« Back      Finish      Cancel

10. Select the columns from the Data source field list box and click button  to move them to Legends, Value and tool tips. Click the  button if you want to remove any column from the Legends, Value and tool tips.
11. There are action available at column field level to **Rename, Remove, Sort, and format** and get a **Row count** or **distinct count**.



**New Widget configuration**


» Datasource Configuration

» Data Configuration

**Datasource Field(s)**

Id	→
Short Description	←
Symptoms	→
Client Name	←
Open Date	→
Category	←
Sub-Category	→
Item	←
Priority	→

**Legends \***

Status 

**Value \***

Ticket ID

**Tooltips**

« Back Finish Cancel

12. Tool facilitates to configure color configuration for charts. Navigate to color configuration wizard and click on Add to additional colors.

» Data Configuration













» Module Configuration

» Columns Configuration

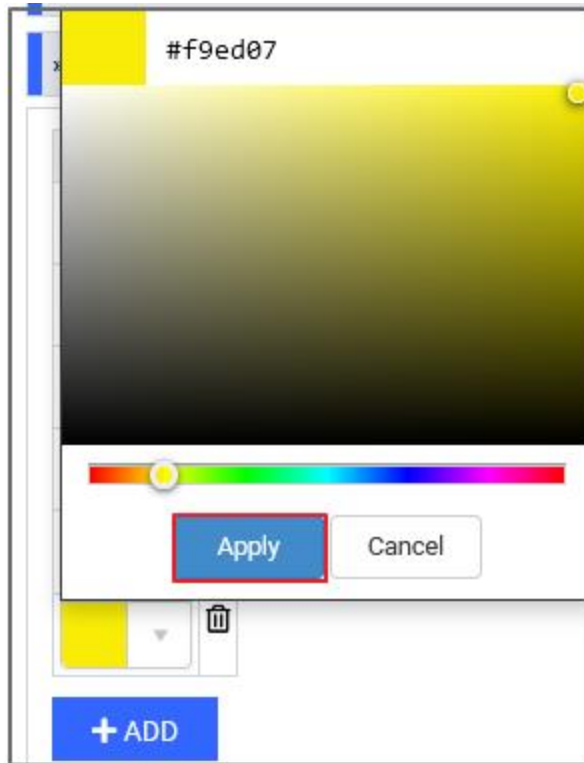
» Filter Configuration

» Color Configuration

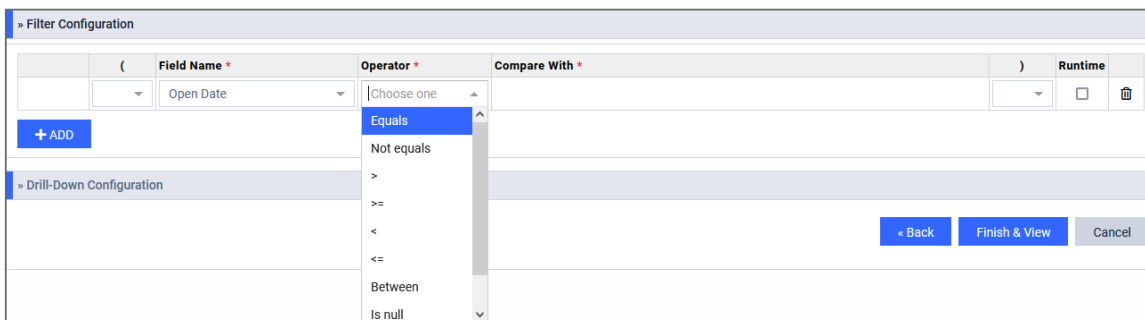
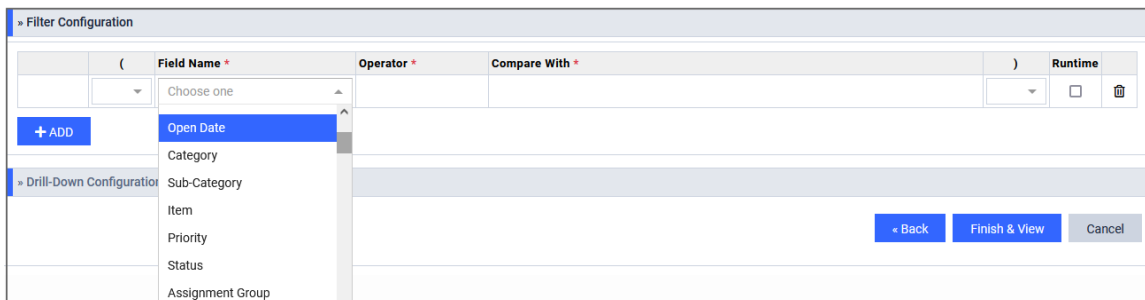
**Color Option**

	▼	
	▼	
	▼	
	▼	
	▼	
	▼	

**+ ADD**



14. Next move to **Filter Configuration**, click on **Add** to add condition. If you are using the date/time filter criteria, select the date column name from the field name drop down list.





> Filter Configuration

(	Field Name *	Operator *	Compare With *	)	Runtime
	Open Date	<=	Choose one		<input type="checkbox"/>
			Value		
			System Field		

+ ADD

> Filter Configuration

(	Field Name *	Operator *	Compare With *	)	Runtime
	Open Date	<=	System Field		<input type="checkbox"/>
			Choose one		
			Today		
			Now		
			Tomorrow		
			Yesterday		
			Today + 7		
			Today - 7		
			Today + 30		
			Today - 30		

+ ADD

> Drill-Down Configuration

Finish & View Cancel

> Filter Configuration

(	Field Name *	Operator *	Compare With *	)	Runtime
	Open Date	<=	System Field	Start of year	<input type="checkbox"/>

+ ADD

**AND** or **OR** option allows to add more than one criteria. You can delete a criteria by clicking the delete icon.

> Filter Configuration

(	Field Name *	Operator *	Compare With *	)	Runtime
	Open Date	<=	System Field	Start of year	<input type="checkbox"/>
AND	Choose one				<input type="checkbox"/>

AND  
OR

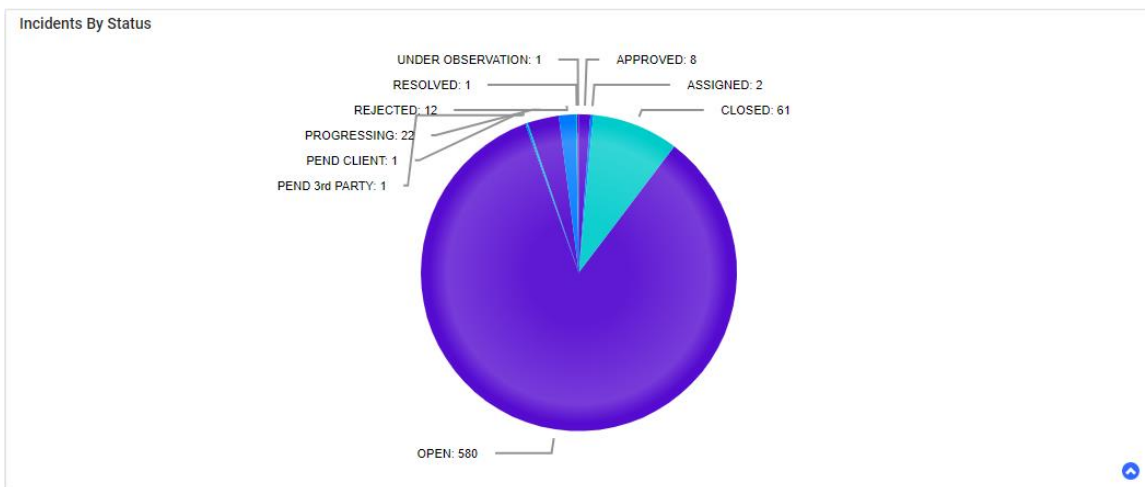
- Drill down Configuration allows user to have drill down report with required fields. Select the columns from the Data source field list box and click button to move them to Columns list box. Click the button if you want to remove any column from the Columns list box.

» Drill-Down Configuration

<p><b>Datasource Field(s)</b> <span style="float: right; border: 1px solid #ccc; padding: 2px;">Search</span></p> <ul style="list-style-type: none"> <li>Id</li> <li>Short Description</li> <li>Symptoms</li> <li>Client Name</li> <li>Open Date</li> <li>Category</li> <li>Sub-Category</li> <li>Item</li> <li style="background-color: #e0e0e0;">Priority</li> </ul>	<span style="font-size: 24px;">+</span> <span style="font-size: 24px;">-</span>	<p><b>Select Field(s)</b></p> <ul style="list-style-type: none"> <li>Id <span style="float: right; font-size: 18px;">i</span></li> <li>Id <span style="float: right; font-size: 18px;">i</span></li> <li>Short Description <span style="float: right; font-size: 18px;">i</span></li> <li>Symptoms <span style="float: right; font-size: 18px;">i</span></li> <li>Client Name <span style="float: right; font-size: 18px;">i</span></li> <li>Open Date <span style="float: right; font-size: 18px;">i</span></li> <li>Category <span style="float: right; font-size: 18px;">i</span></li> <li>Sub-Category <span style="float: right; font-size: 18px;">i</span></li> <li>Item <span style="float: right; font-size: 18px;">i</span></li> </ul>	<span style="font-size: 24px;">↑</span> <span style="font-size: 24px;">↓</span>
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« Back
Finish & View
Cancel

Finally click on **Finish & View** to view the report.



Drill down option is enabled in all graphical reports. Clicking on graph, page will display drill down report and clicking on specific ticket will take to the next level to view the real ticket data.

Incidents By Status (Drilldown) Action ▾ 25 Search

ID	Short Description	Symptoms	Client Name	Open Date
IN-200910-0002	Application Slowness Issue, Application Name:...	Application Slowness Issue, Application Name:...	Allied	09/10/2020 09:36:29
IN-200928-0002	Hardware Relocation for [*Insert User's Name] ...	&nbsp;DescriptionDesk   Hardware Relocation ...	Allied	09/28/2020 17:16:21
IN-201026-0003	Account Lockout	&nbsp;DescriptionUnable to access office netw...	Allied	10/26/2020 14:46:20
IN-201027-0004	Printer paper Jam, Printer Name:HP DeskJet 3...	Printer paper Jam, Printer Name:HP DeskJet 3...	Allied	10/27/2020 18:36:42
IN-201103-0013	Application Slowness Issue, Application Name:...	Application Slowness Issue, Application Name:...	Allied	11/03/2020 14:36:01
IN-201104-0014	Printer Connection Issue, Printer Name:HP Des...	Printer Connection Issue, Printer Name:HP Des...	Allied	11/05/2020 00:19:23
IN-201106-0002	Application Slowness Issue, Application Name:...	Application Slowness Issue, Application Name:...	Allied	11/06/2020 19:58:00
IN-201109-0003	Samples Ticket 1	SAMPLE 1	Allied	11/09/2020 16:06:22
IN-201117-0095	Outlook is not working. Unable to send mails	Outlook is not working. Unable to send mails	Allied	11/18/2020 00:14:41
IN-201217-0003	Account Lockout	&nbsp;DescriptionUnable to access office netw...	Allied	12/17/2020 11:19:03
IN-210108-0002	Browser Compatibility Issue	&nbsp;Description*Browser Name: [*]*Browse...	Allied	01/08/2021 14:25:15
IN-210108-0003	Browser Compatibility Issue	&nbsp;Description*Browser Name: [*]*Browse...	Allied	01/08/2021 14:50:13
IN-210108-0011	Application Slowness Issue, Application Name:...	Application Slowness Issue, Application Name:...	Allied	01/08/2021 20:31:17

Count: 23  
1 - 23 of 23 items

Edit Incident - IN-200910-0002 Update Action ▾ Search Related Items ▾ View Attachment(s) ▾

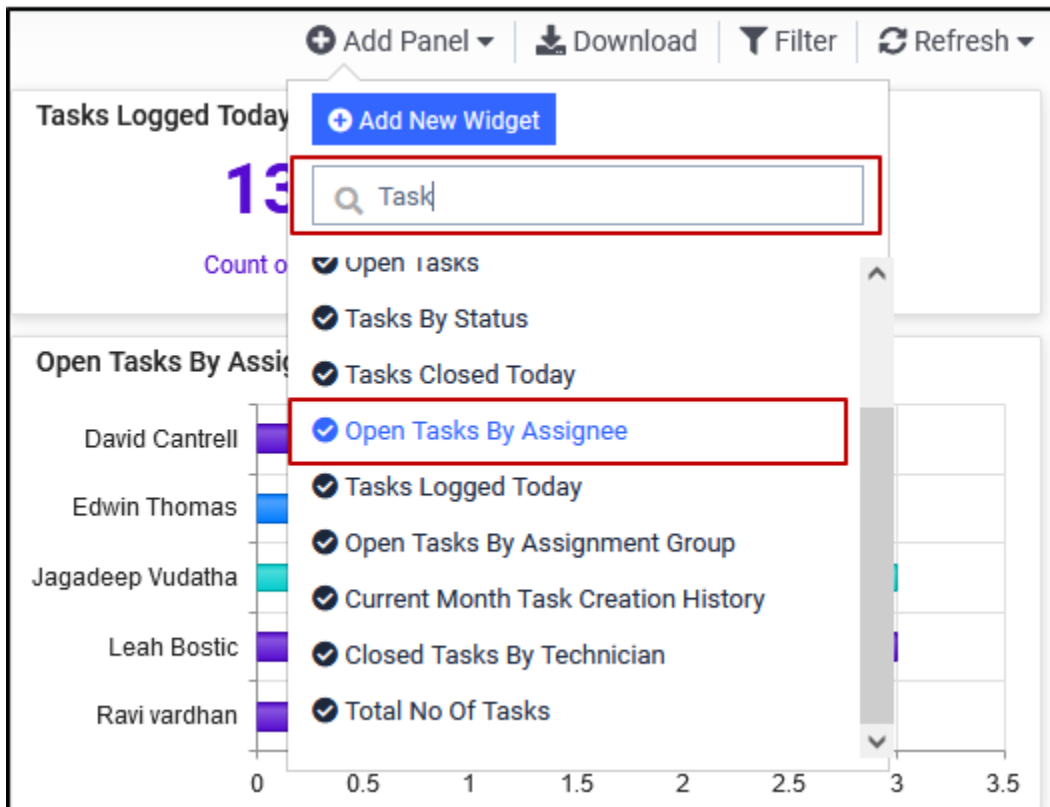
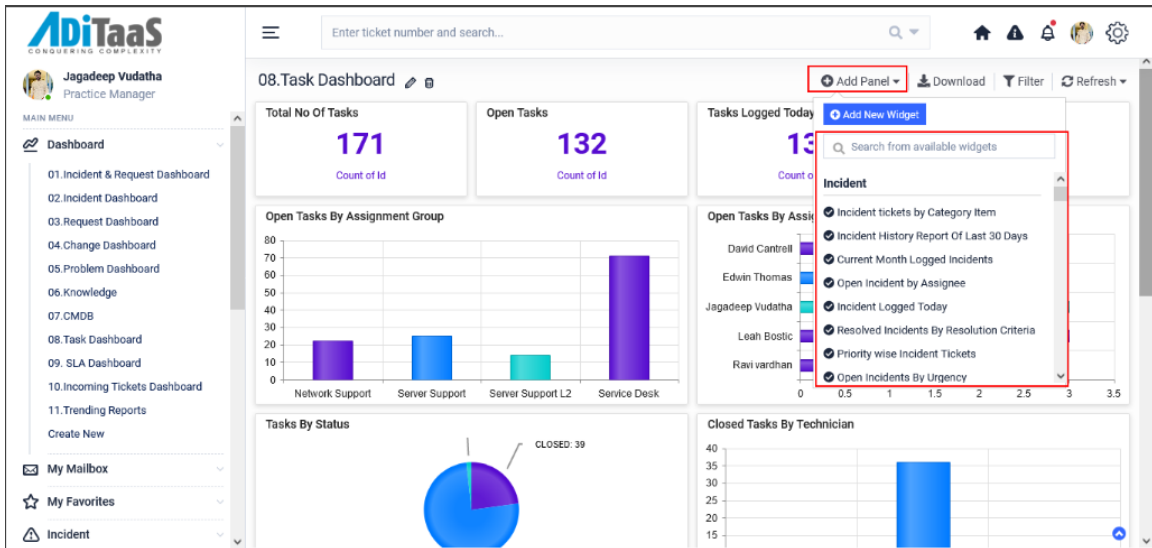
Ticket Details Activity Log Task (0) Approval (0) Links (2) Schedules (0) More Info Impacted CI (0) Tr

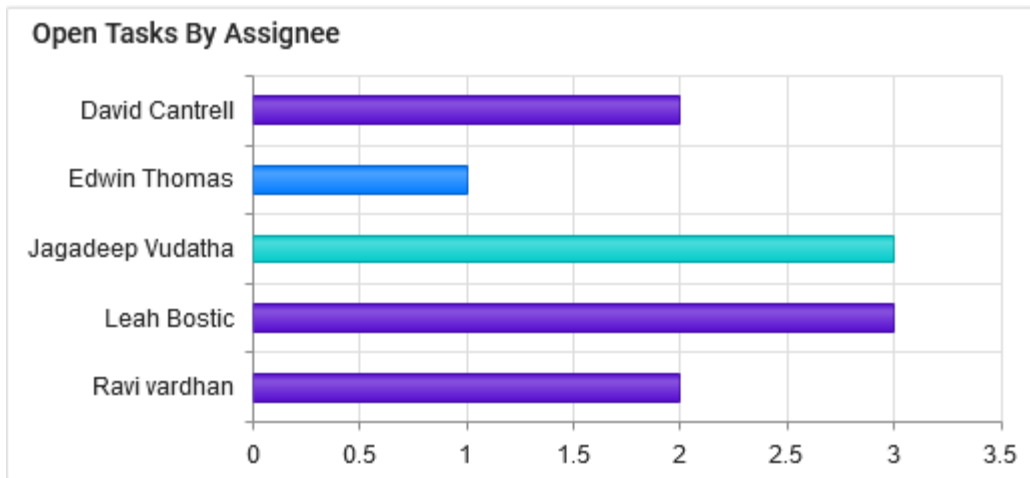
Client Name *	Requestor Name *	Location	Contact No.
Allied	Priya Lewis	Mahape	0612652849
Category/Sub Category/Item *	Response Target	Resolution Target	
PHONE/CONFERENCE PHONE/CONFERENCE PHONE	100%	100%	
Status *	Impact *	Urgency *	Priority *
PROGRESSING	MEDIUM	MEDIUM	P2
Channel *	Assignment Group *	Technician Name	Preferred Contact
CHAT	Server Support L2	Choose one	Choose one
Field Service	Configuration Item	Alternate Contact	Alternate Location
<a href="#">Schedule Call</a> <a href="#">Track Engineer</a>	CI-200917-0001		
Vendor Ticket Number	On Behalf Of	Notification Mode	

### ADD EXISTING WIDGET TO DASHBOARD

Ready available widgets will be available under **Add Panel**.

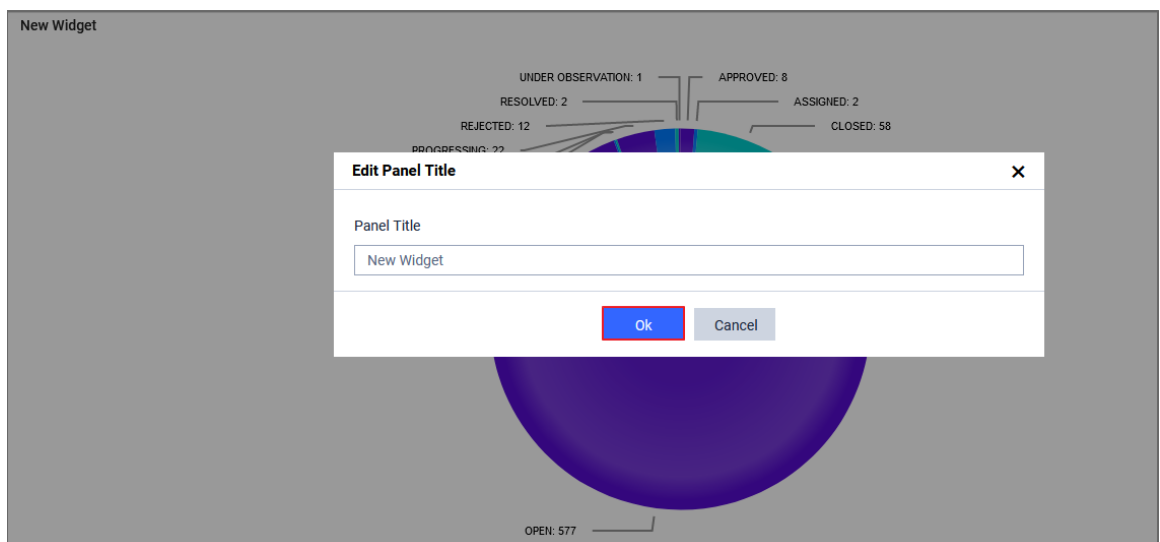
1. Navigate to Search for available widgets
2. Enter a relevant name in search box to search for specific widget.
3. Click on widget to add on the dashboard

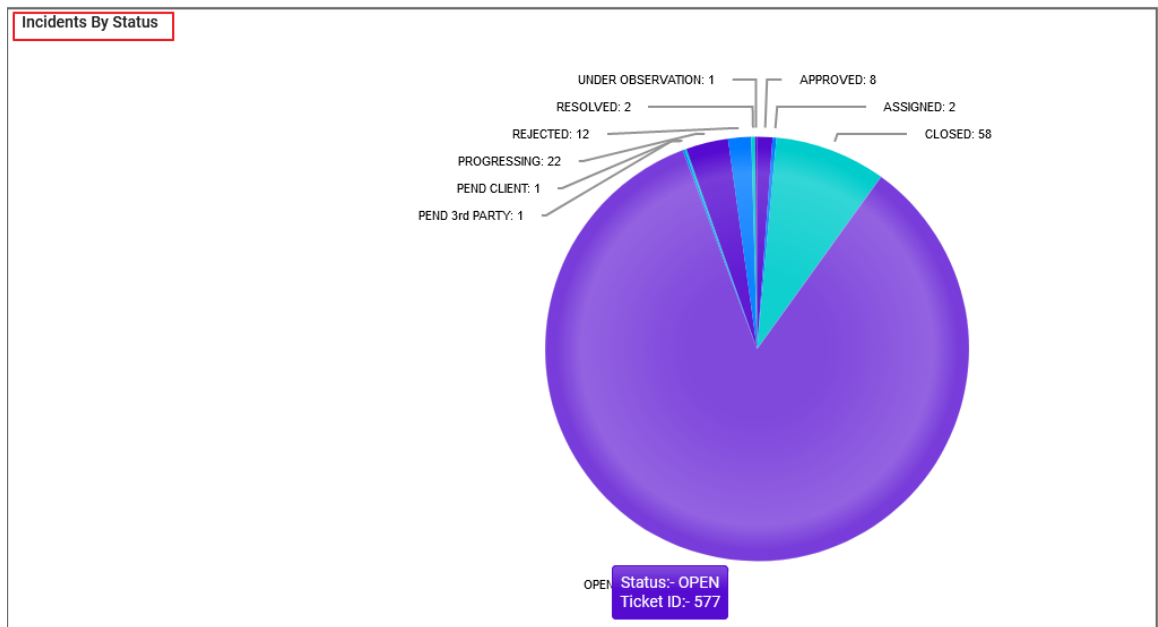
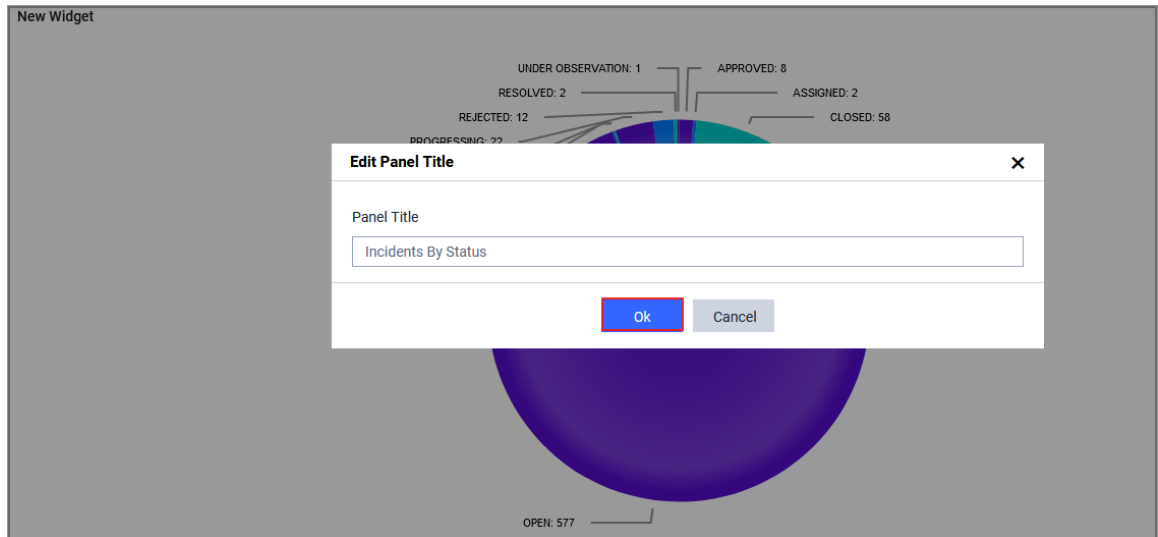




### RENAME WIDGET

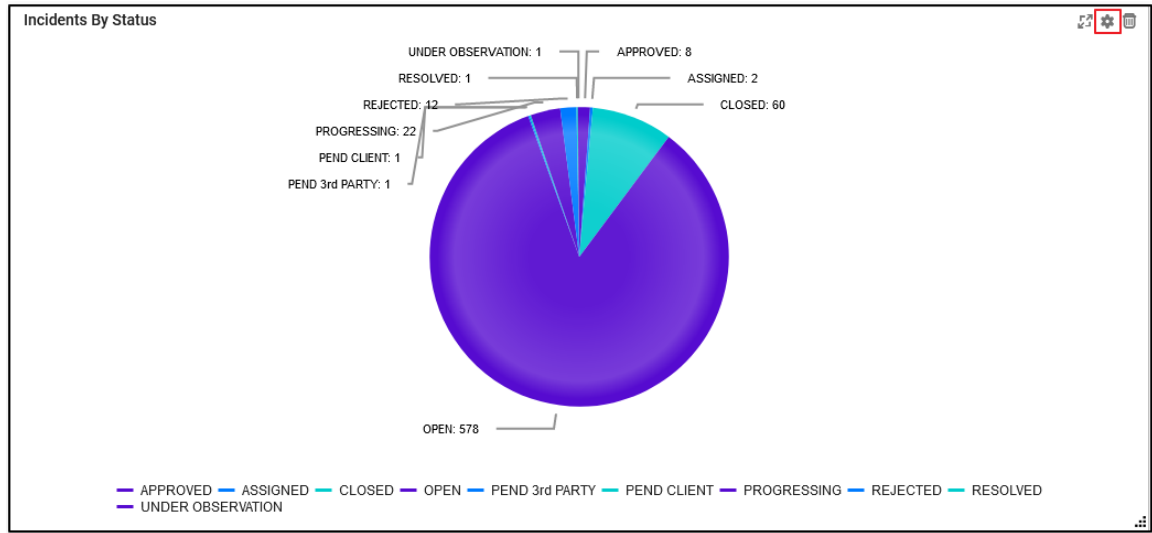
To rename the widget double click on widget. Enter relevant name to the widget and click on ok.





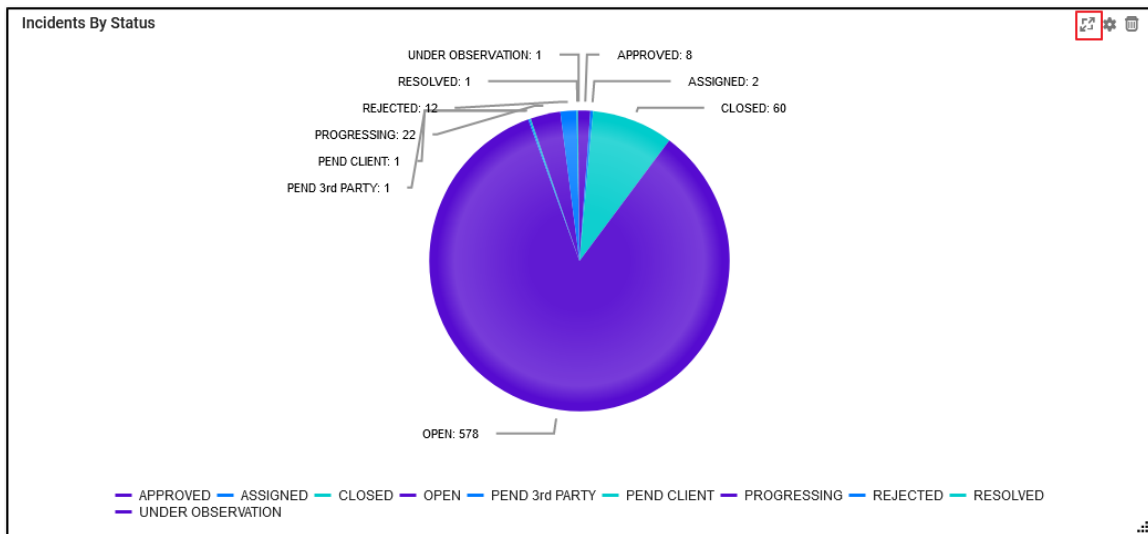
## EDIT WIDGET

To edit widget click on configuration icon at the right end side. Upon clicking on the icon you will be able to change the widget type and existing configurations.



### MAXIMIZE WIDGET

To view widget in full screen click on icon at the top right side.

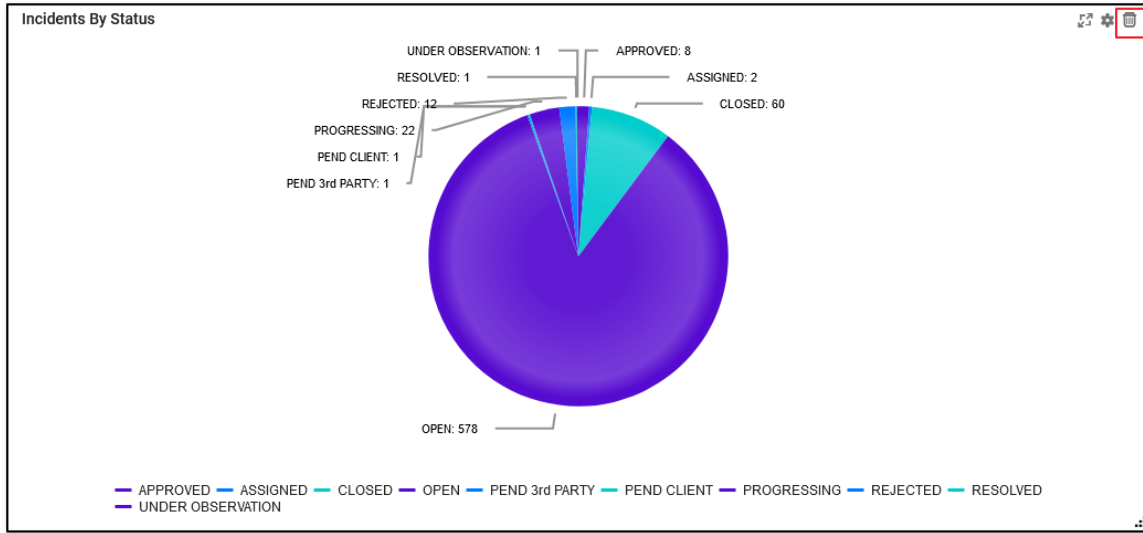


### DRAG AND DROP WIDGET

On mouse over on widget + symbol appears on screen, which will enable to move widget top to bottom and left to right without any efforts.

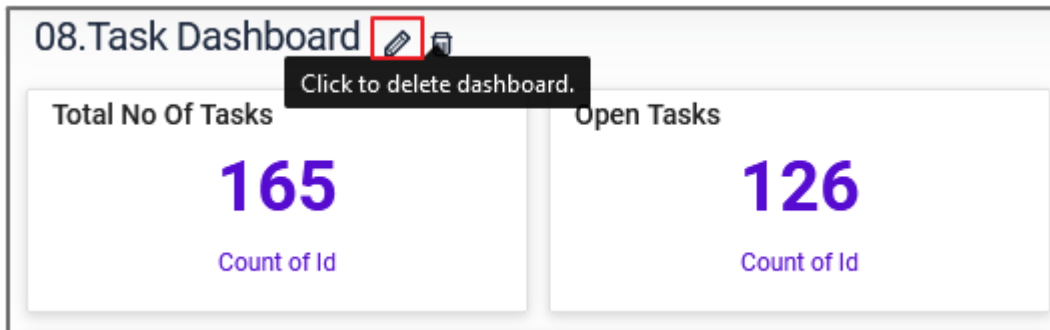
### DELETE WIDGET

Click on delete icon to delete the widget



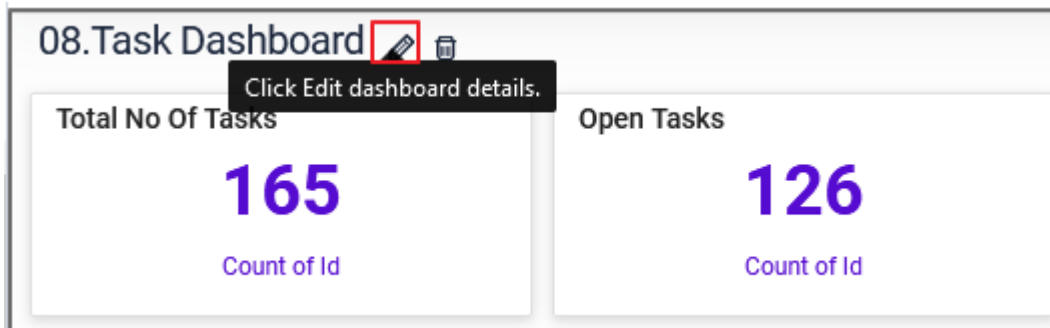
### DELETE DASHBOARD

Click on delete button placed next to dashboard title. Displays a confirmation message. Click on Yes to delete the dashboard.



### RENAME DASHBOARD

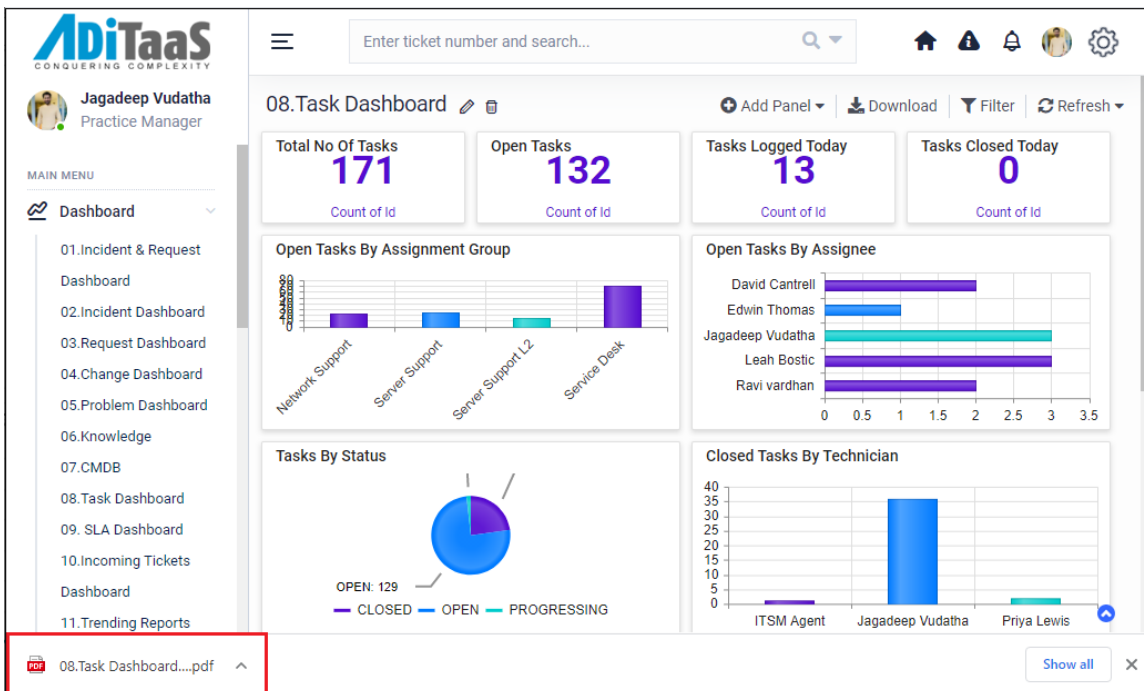
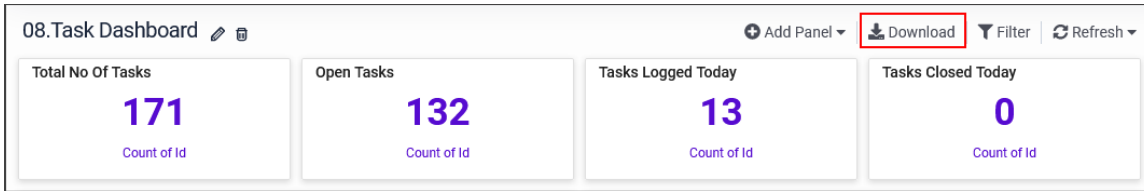
Click on edit button placed next to dashboard title. Provide the relevant name in text field and click on ok.

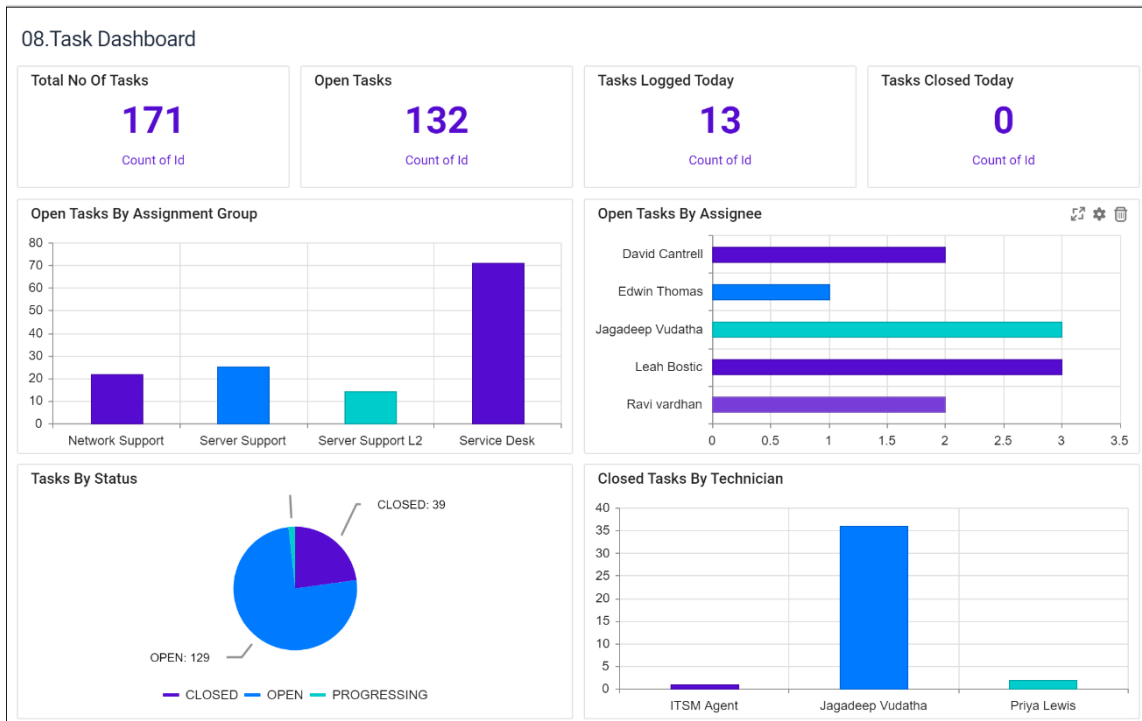




## DOWNLOAD DASHBOARD

Tool facilitate to download the dashboard. Downloaded dashboard will be saved in PDF.





## REFRESH DASHBOARD

Tool facilitates to set the refresh rate for dashboard. Click on Refresh and drag circle to set the refresh rate.

