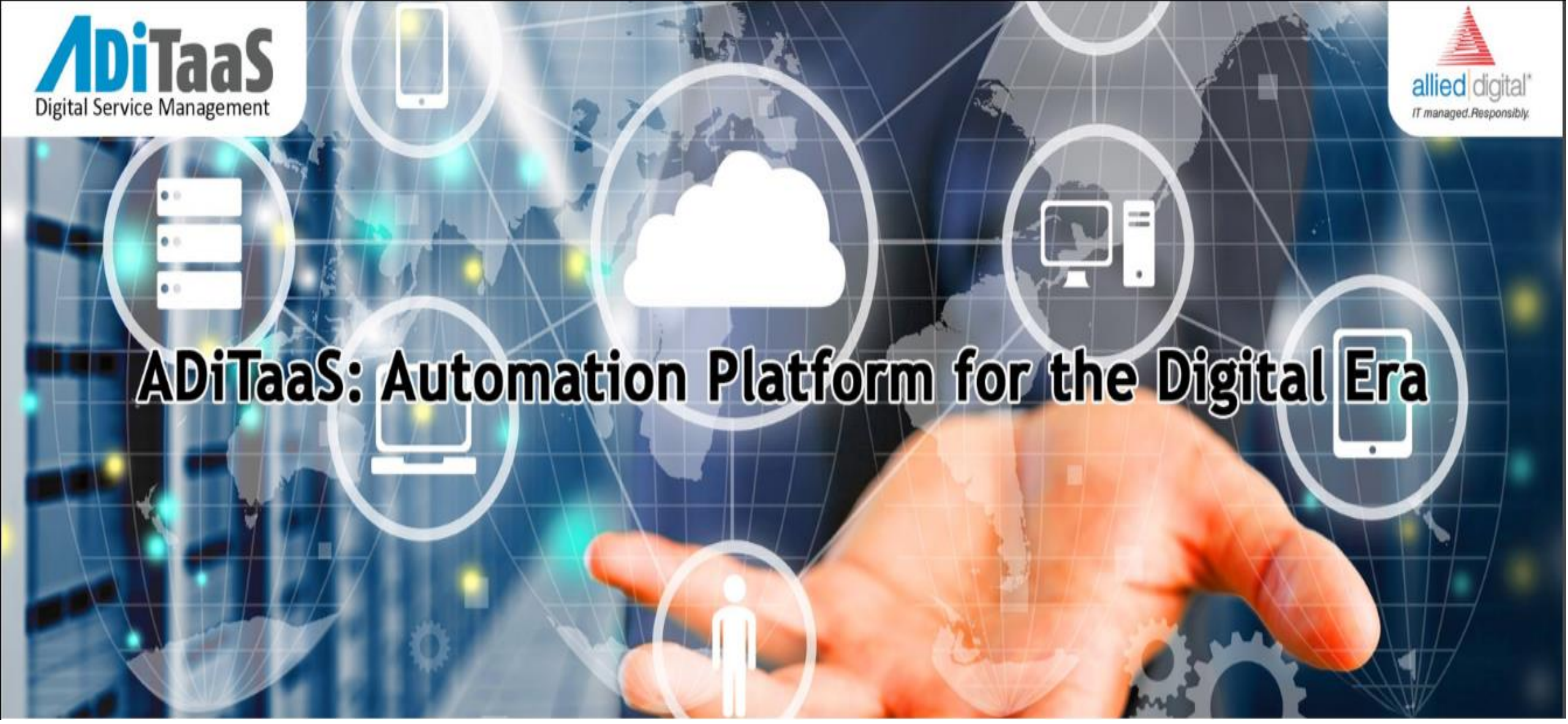


ADiTaaS v5.1

AGENT GUIDE

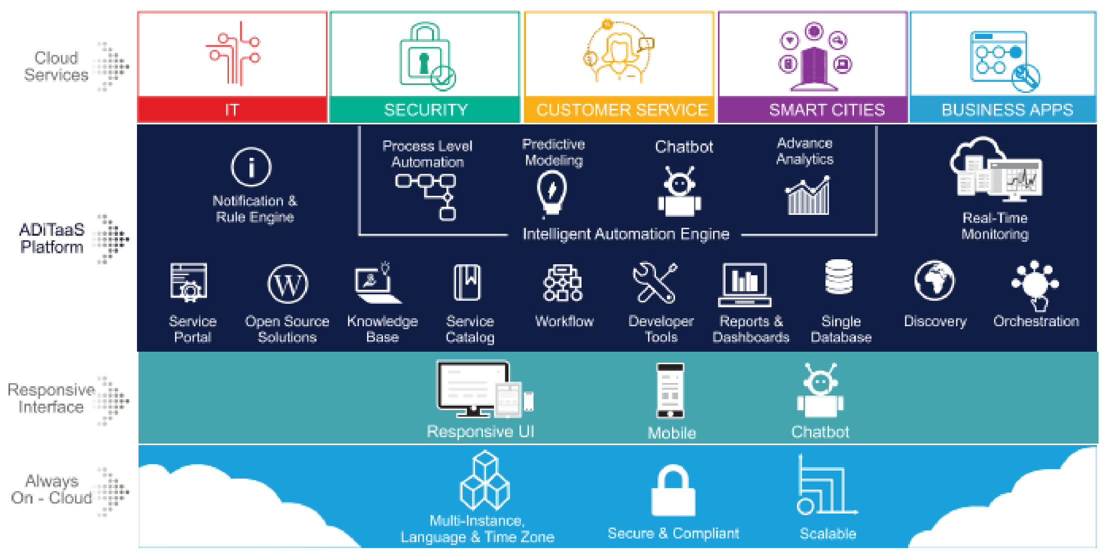
June 30, 2021

Contents

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:

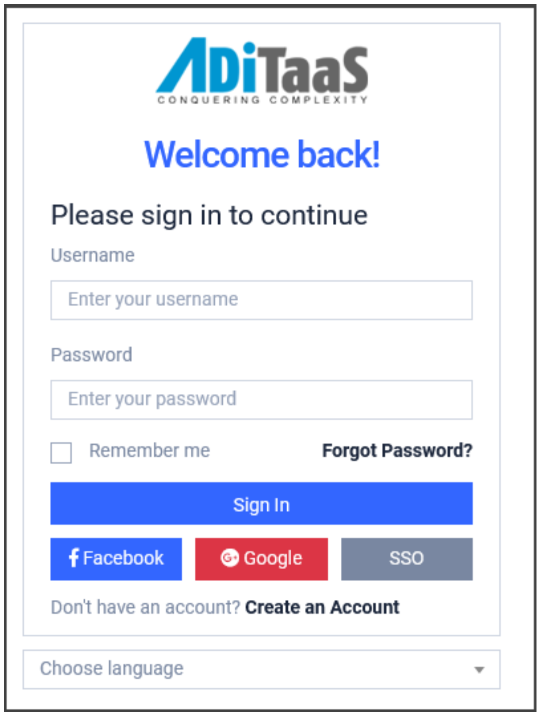
Login in to ADiTaaS from any device using your domain ID account.

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:

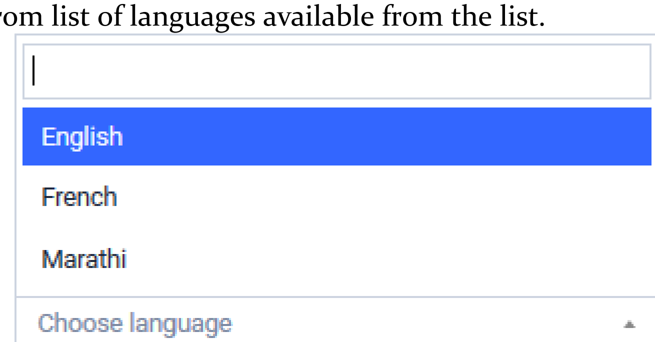
Click on Google icon and enter Google credentials to login.

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.

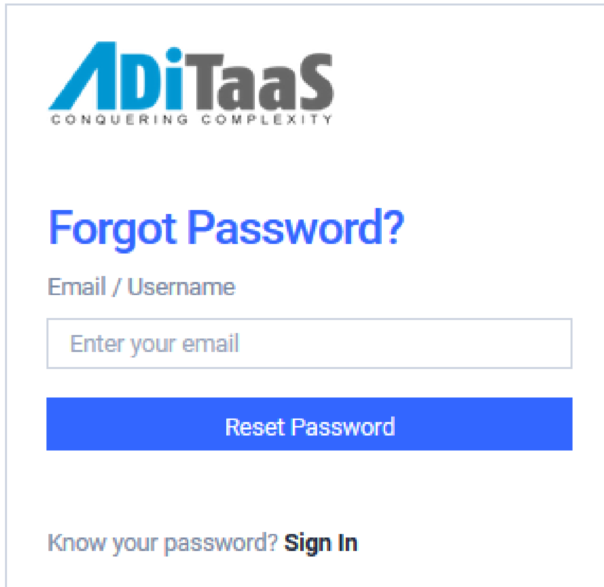
CHOOSE LANGUAGES:

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



FORGOT PASSWORD:

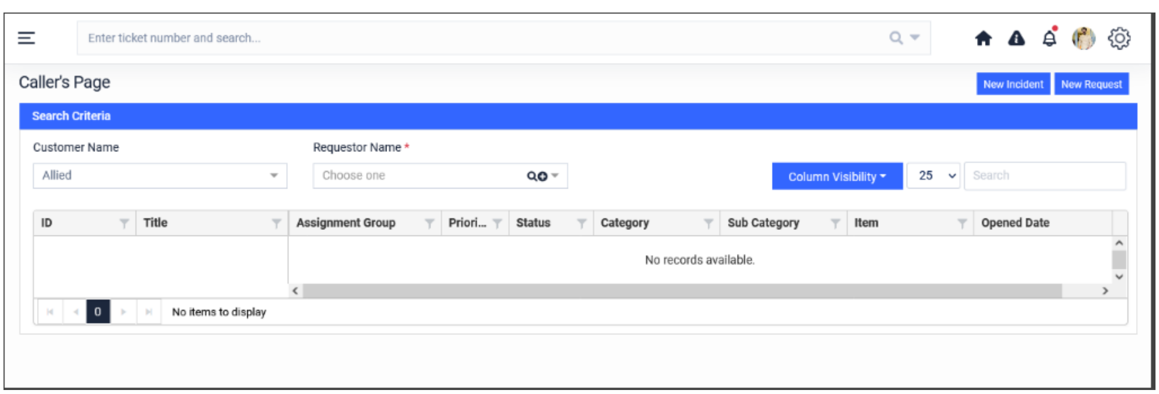
If you have forgotten your password and you previously entered an email address when signing up for the account or in your Preferences, and you still have access to that email account, then this option can help you recover access to your account.



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

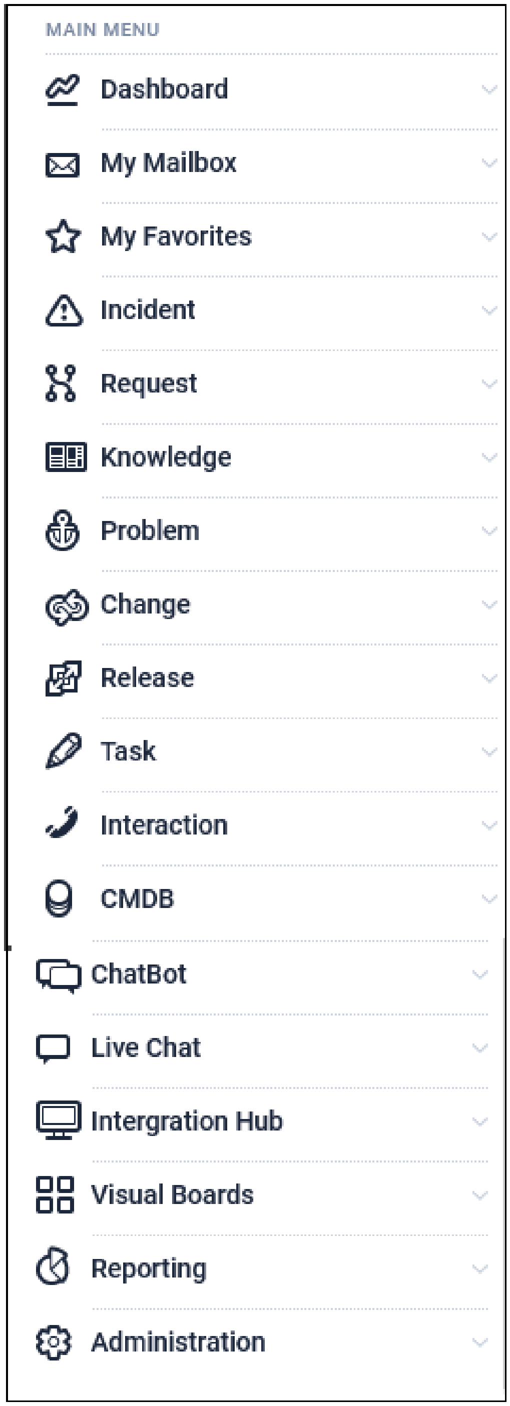
Home Page

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.

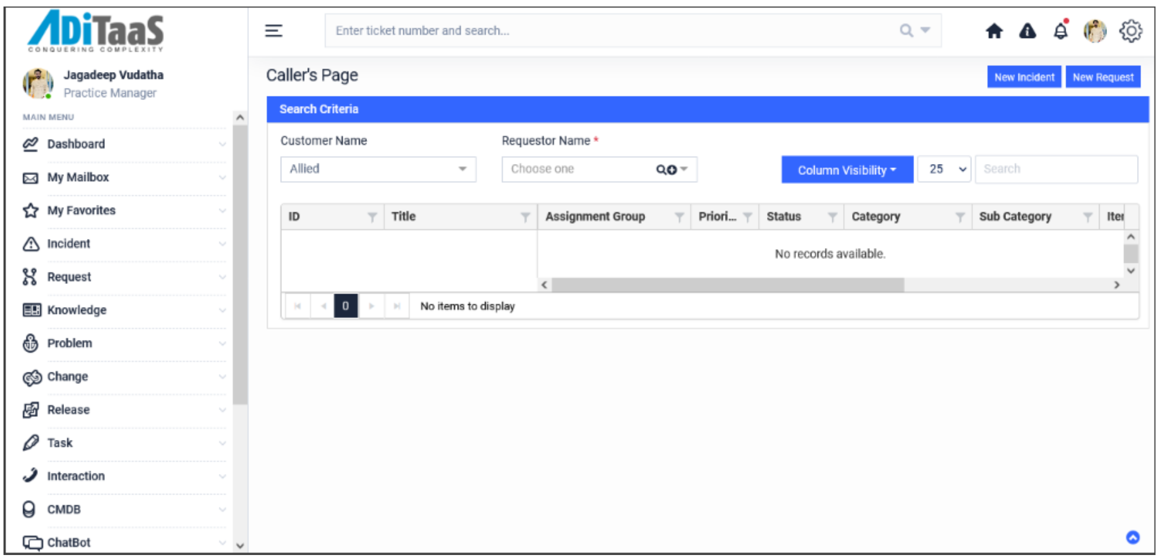
MAXIMIZE SCREEN

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

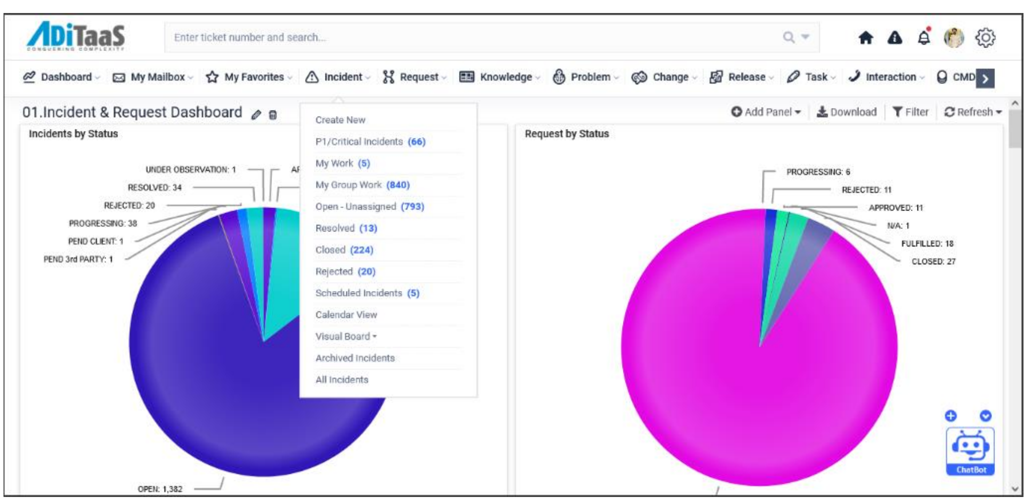
THEME SETTINGS

Right side top we can some ions 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.

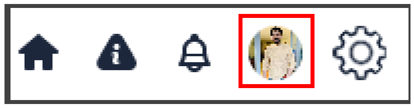


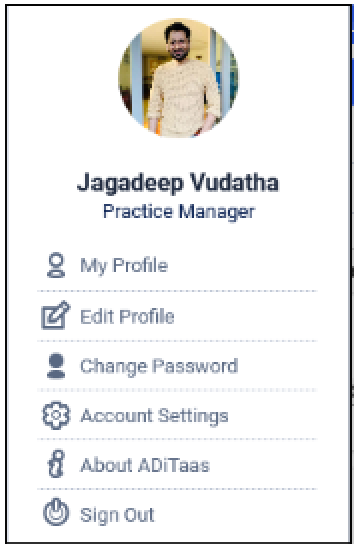
Here in below theme menu bar is at the top and information/documentation area is at the bottom.



USER PROFILE

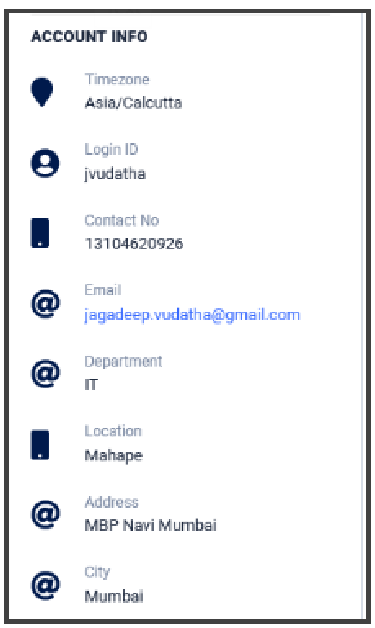
Allows to modify the account related information.





My Profile-

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



Edit Profile-

User can to modify profile information from edit profile.

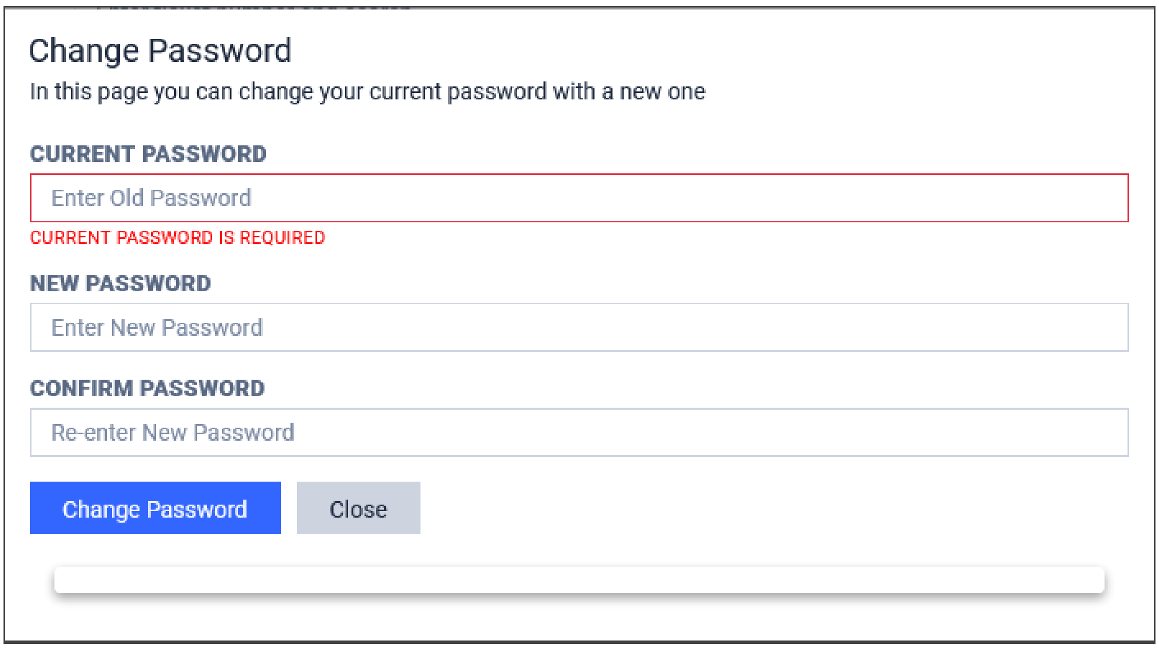
Change Password-

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



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:

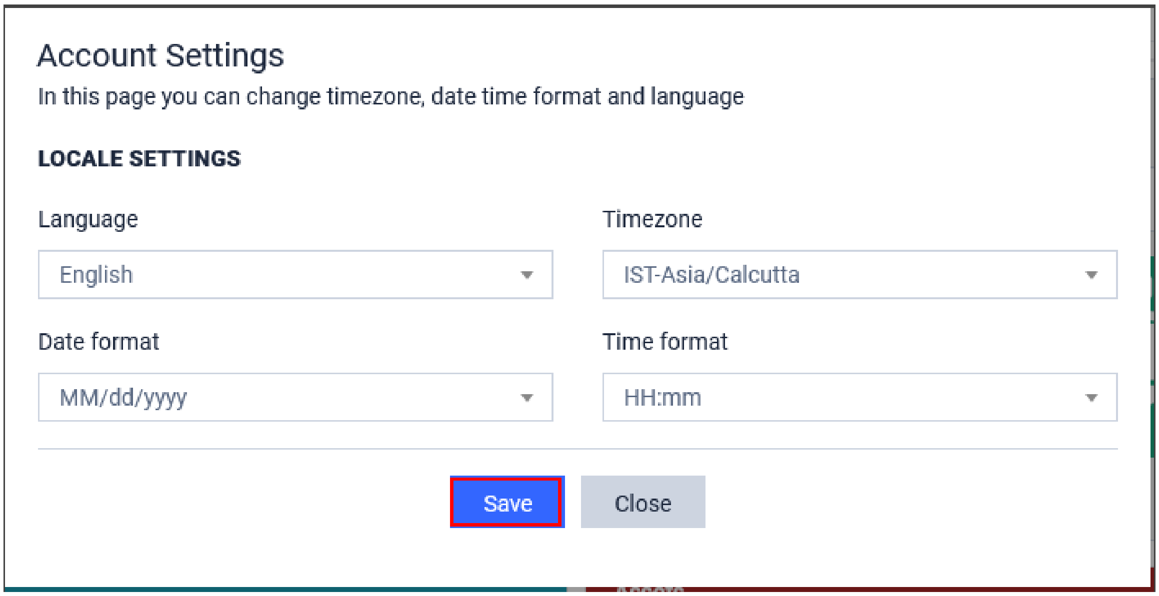
1. On the toolbar, click Account Settings
2. The Account Settings page appears.
3. In the Time zone list, select your current time zone, then click Save.

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.

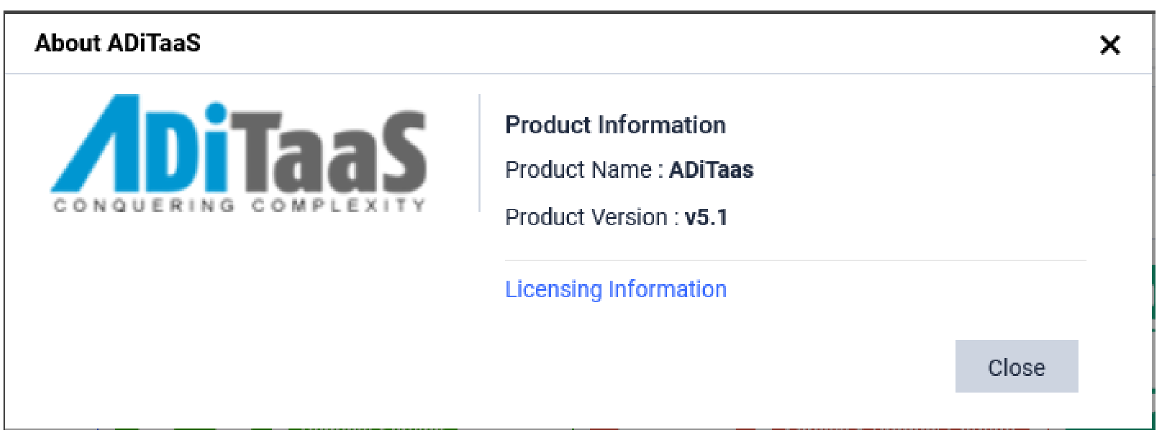
To set your Date/Time Format

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.



About ADiTaaS-

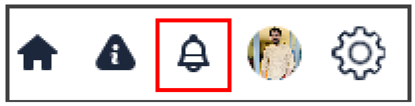
User can view version of ADiTaaS tool.



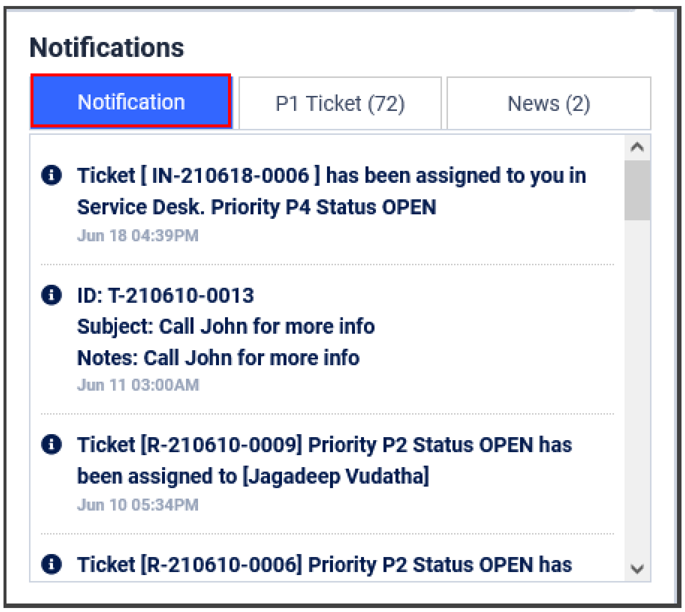
Sign Out- Click on sign out to exit from the tool.

NOTIFICATIONS

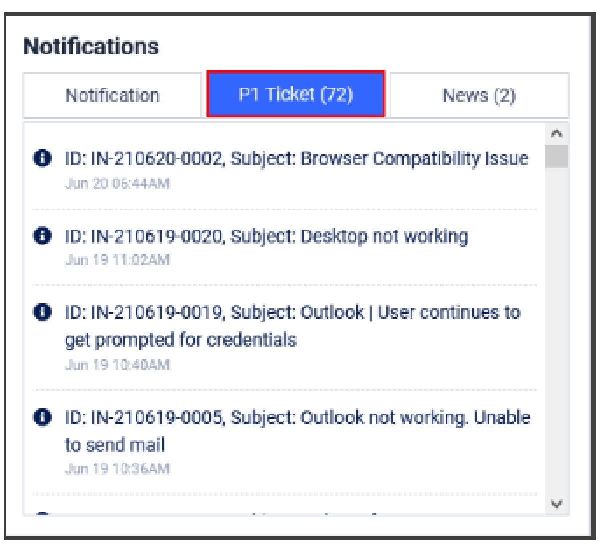
Next we have notification icon. Any notification like email notification, reminder notification all the notifications will be displayed under Notification icon.
If any new notification appears then bell icon appears to be in red color so that you will be knowing that there is a new notification.



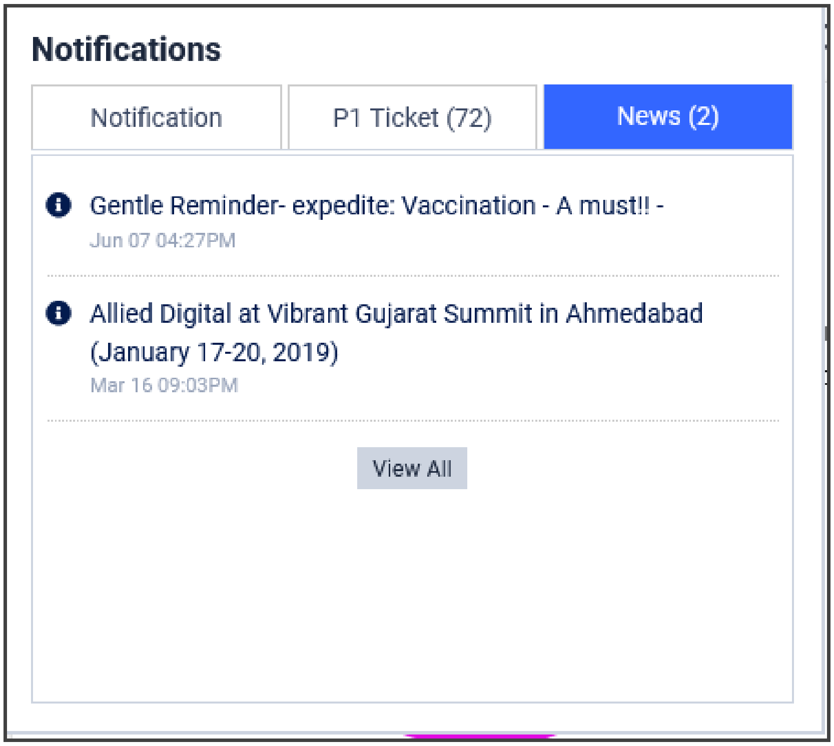
There are 3 tabs under notification icon.
Notifications- Displays all kinds of notifications



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.

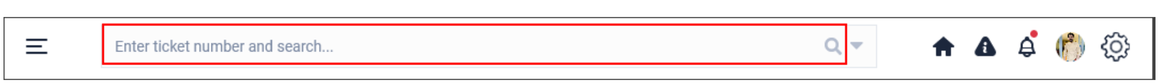
Click on tool bar to access the Agent user guide.

HOME ICON

Clicking on home icon will redirect to home page.

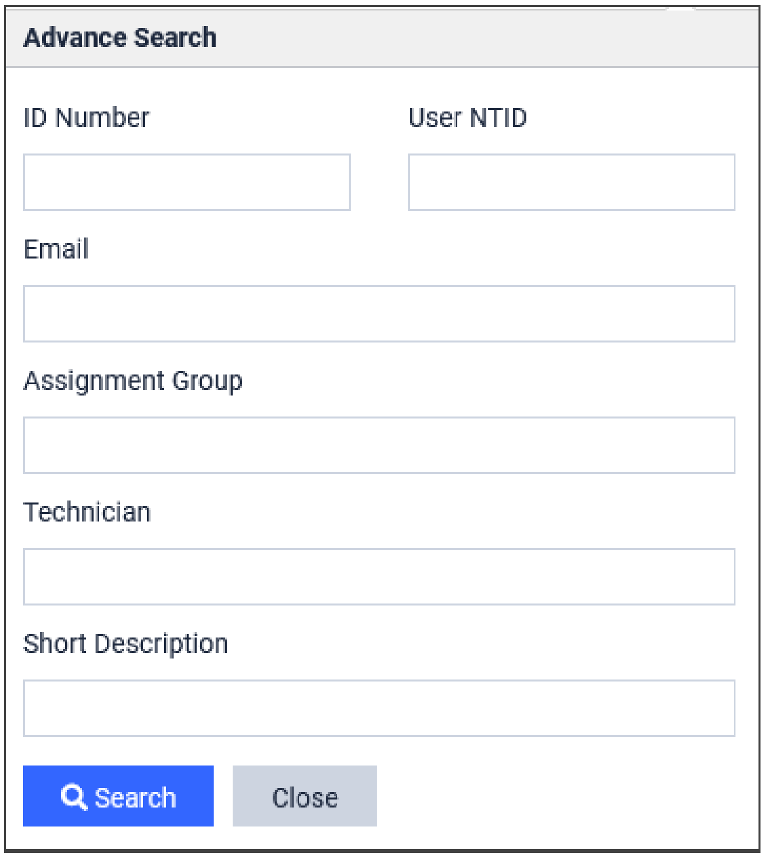
SEARCH FOR A TICKET

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.

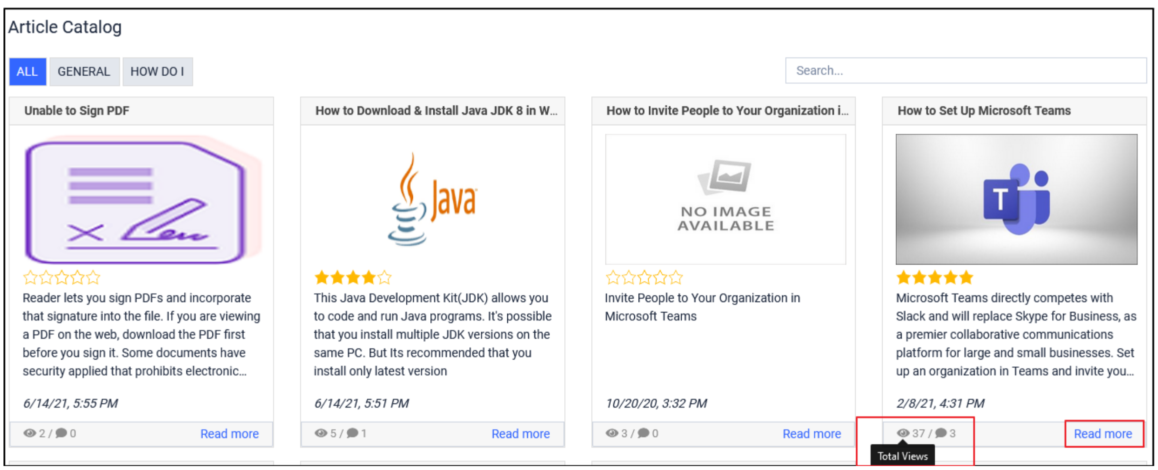


MY FAVORITES

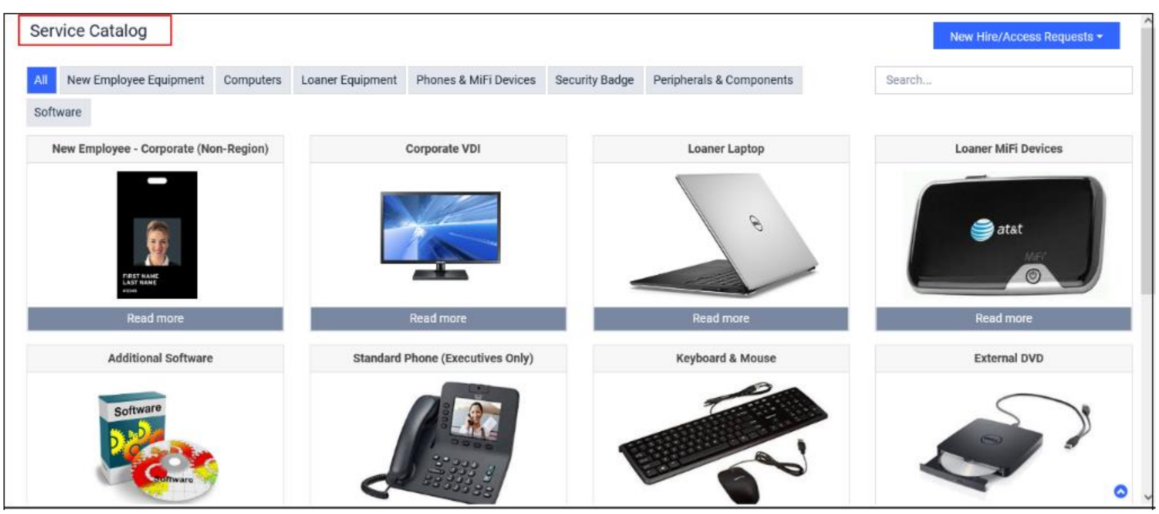
My Favorites is a combination of all the links of other modules which are used frequently.

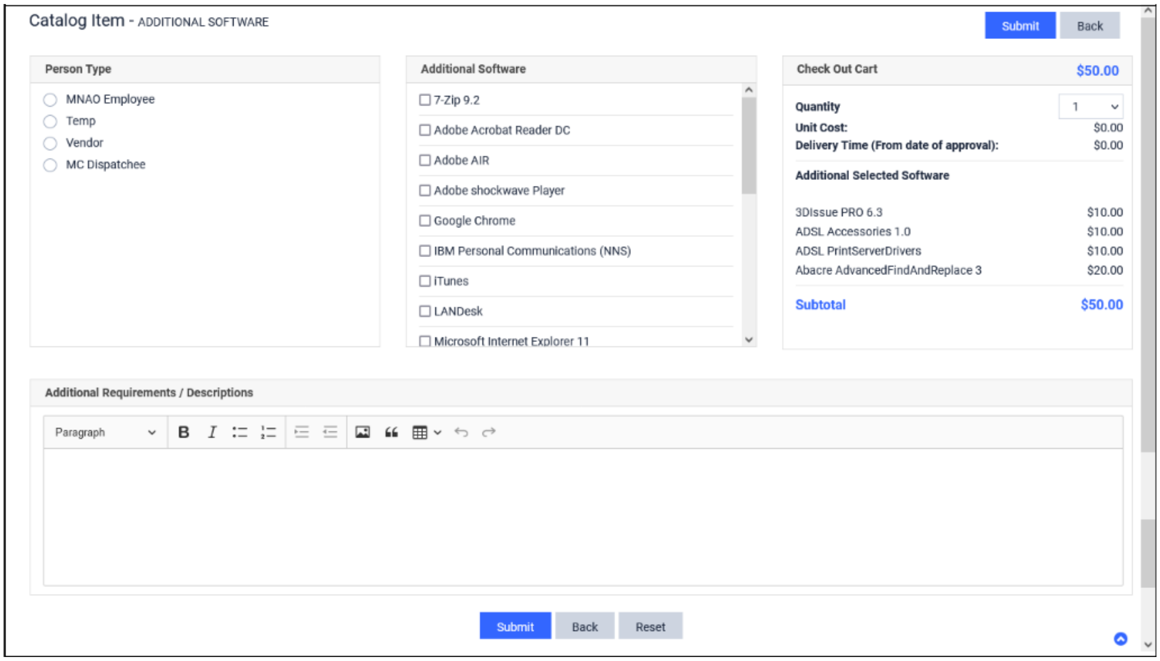
- **Caller's Page**- This is a default home page for all agents.
- **My Tickets**- Displays list of tickets for which you are a contact person or a requestor.
- **My Work**- Displays all Incidents, Requests, Tasks, Problem and Change tickets assigned to you.
- **My Group Work**- Displays all Incidents, 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. Theses informative articles will help agent to work to solve any common known issues.

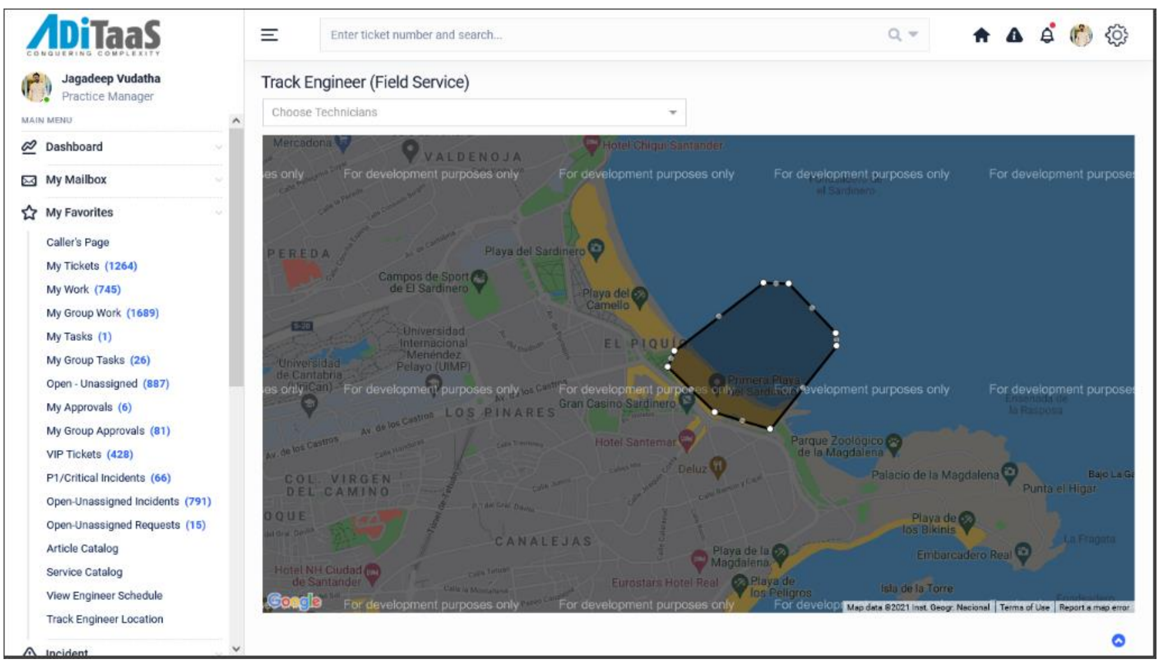


- **Service Catalog**- Displays list of services available. Click on any respective catalog item to raise a request. Fill the information and click on submit.





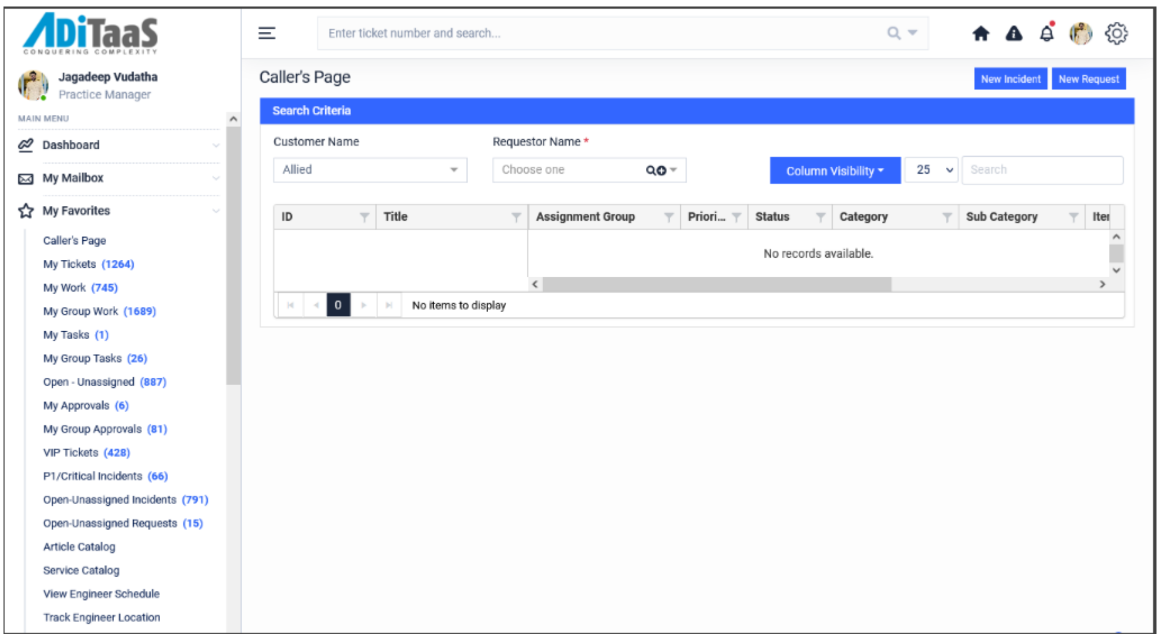
- **View Engineer Schedule-** Displays an each engineer's scheduled task details.
- **Track Engineer Location** – Helps to track engineer location.



CALLER'S PAGE

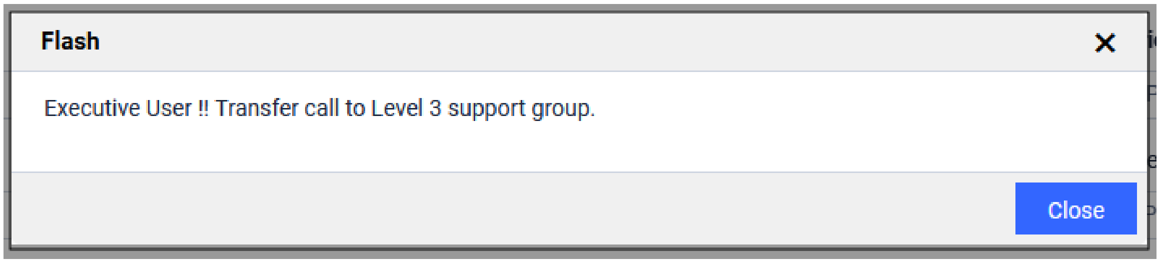
Caller's Page – This feature helps agents to quickly cross check if any open tickets are already exists in system for same issue reported by user. Caller's page displays all the tickets of respective user.

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.



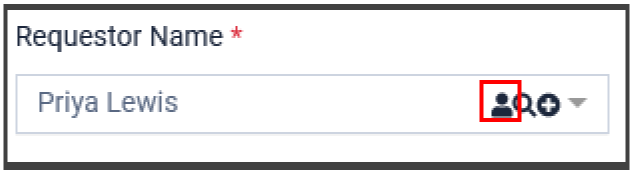
VIP USER:

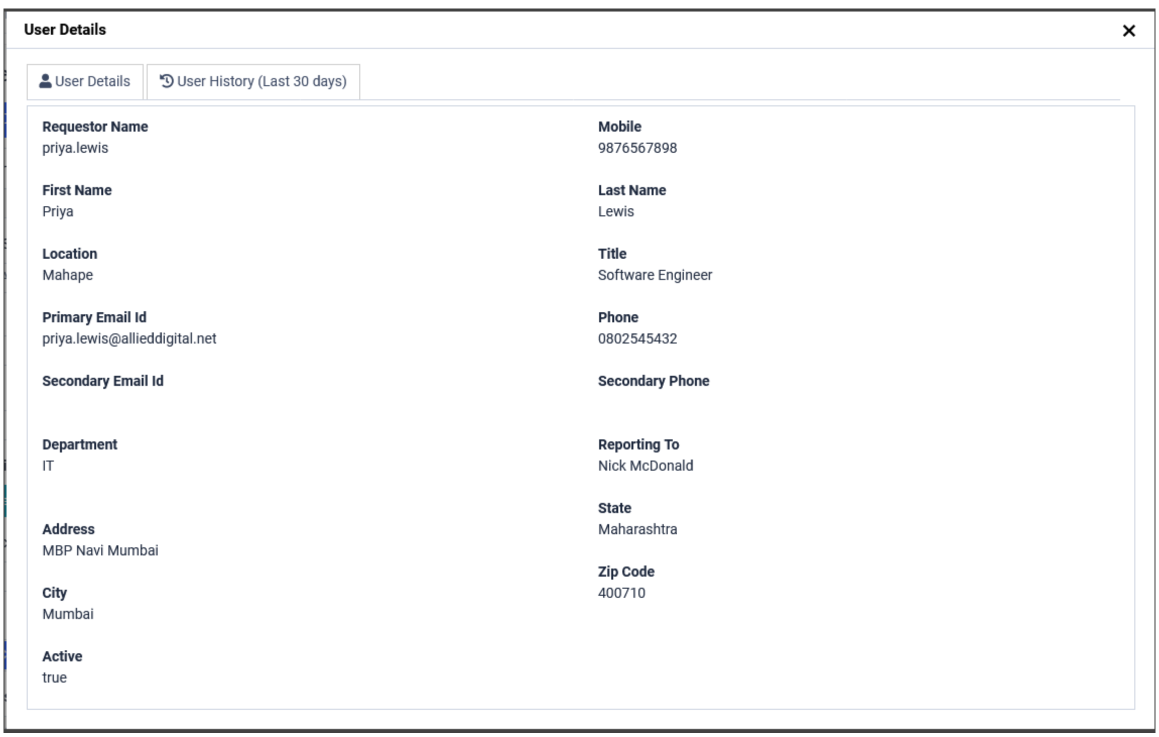
If the selected user is VIP user, then in Requestor Name field a VIP icon will be displayed, and on mouse over a pop-up will flash with more information.

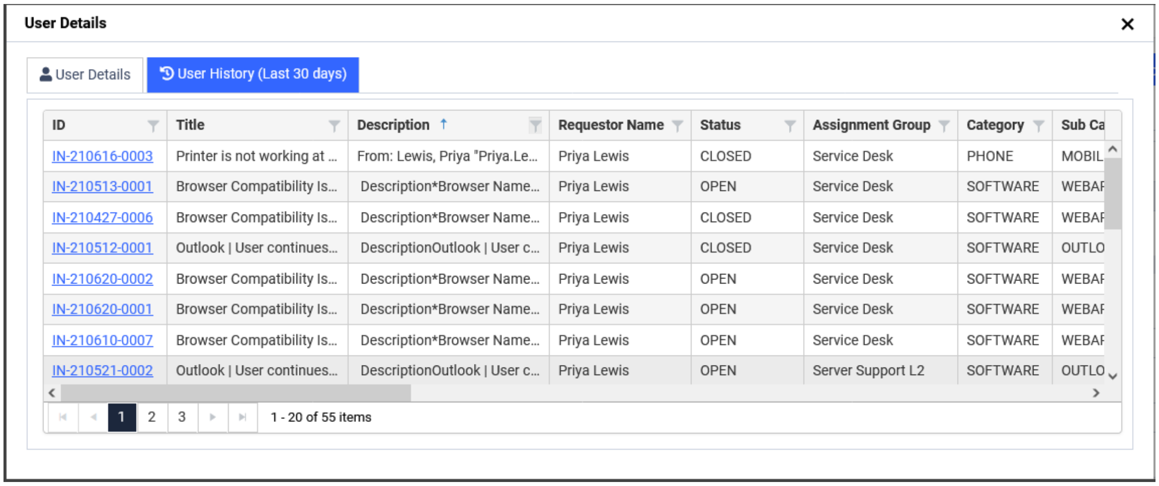


USER DETAILS

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

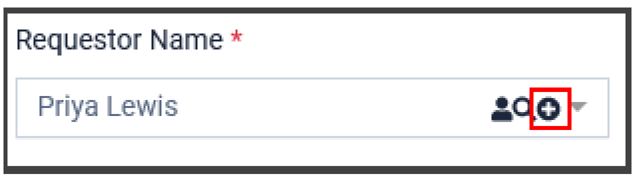


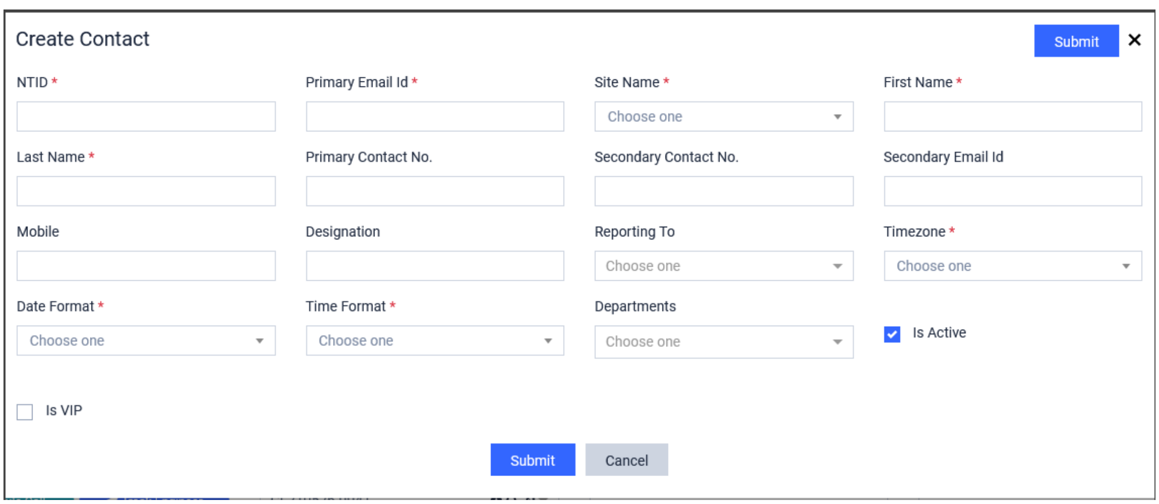




CREATE NEW CONTACT

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





SEARCH FOR REQUESTOR NAME

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

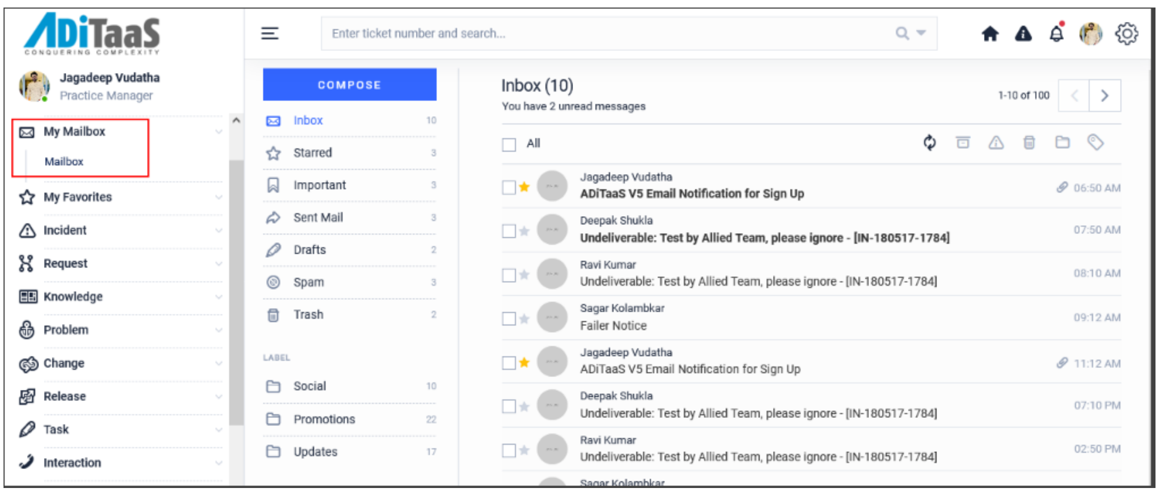
User List

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

1 2 1 - 15 of 29 items

My Mailbox

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



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.

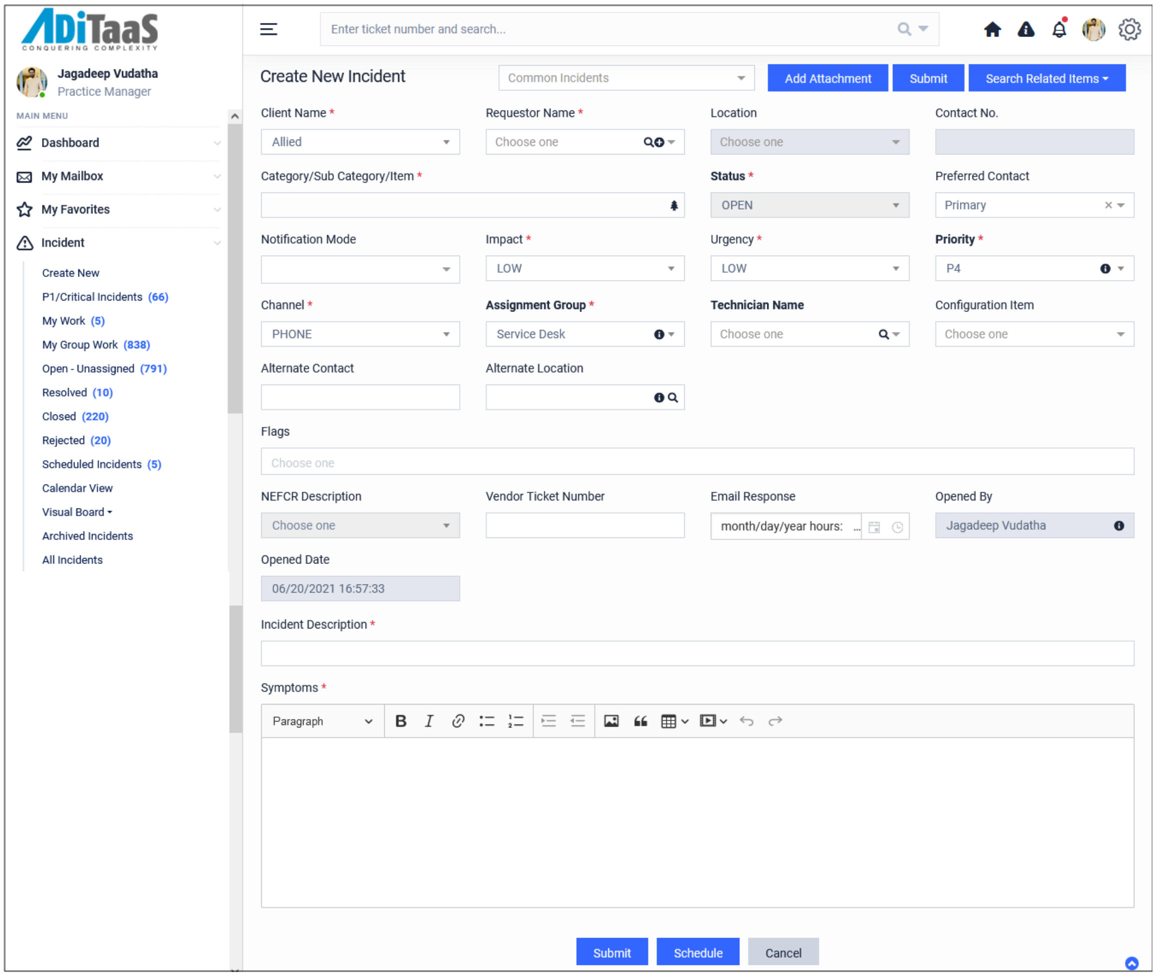
s. **Vendor Ticket Number-** Optional field. Third Party ticket id can be maintained in this field.

t. **Opened Date:** System auto captures date and time when incident is created.

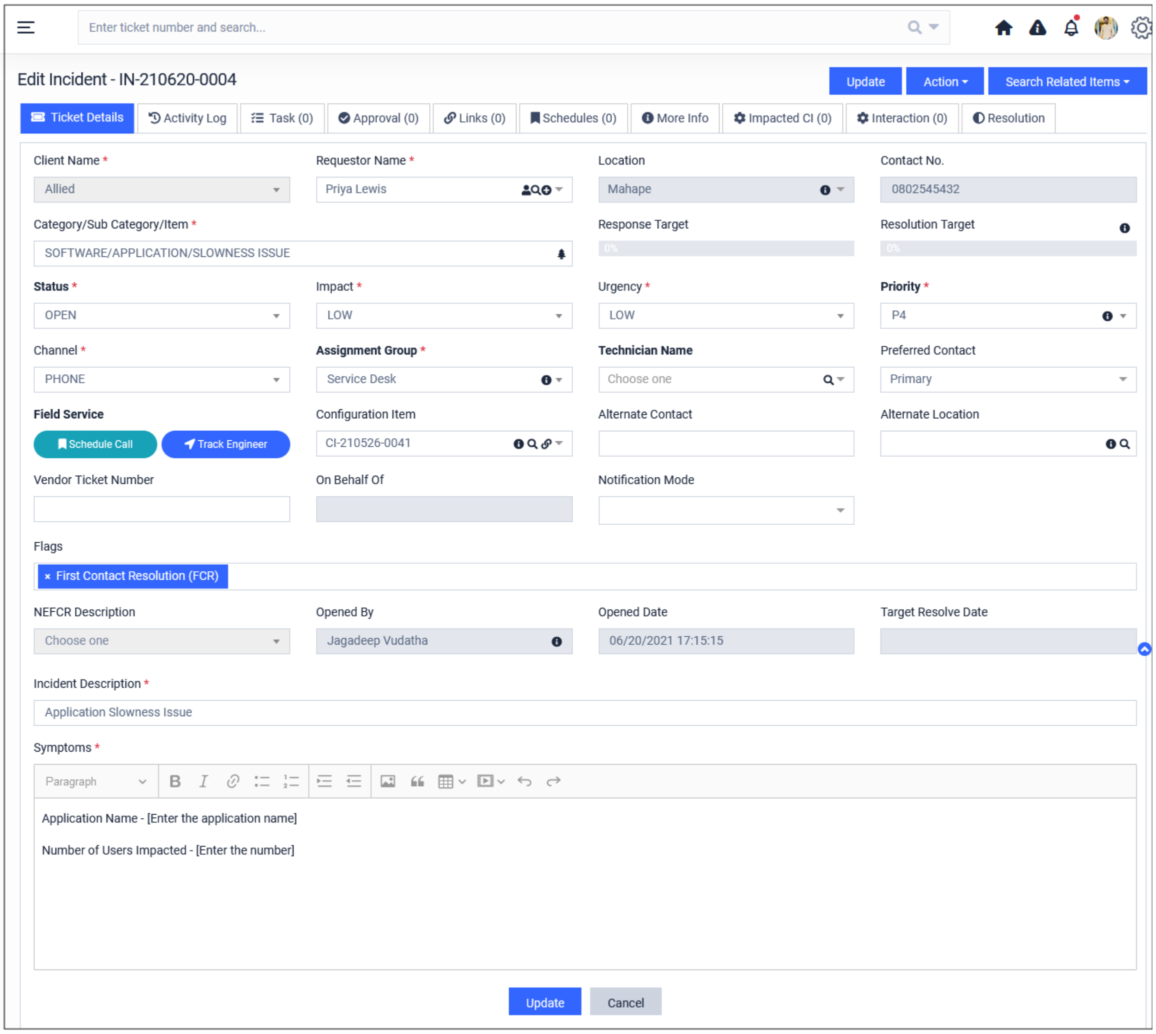
u. **Opened By:** System auto captures name of the agent/ end user who has created the incident.

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.

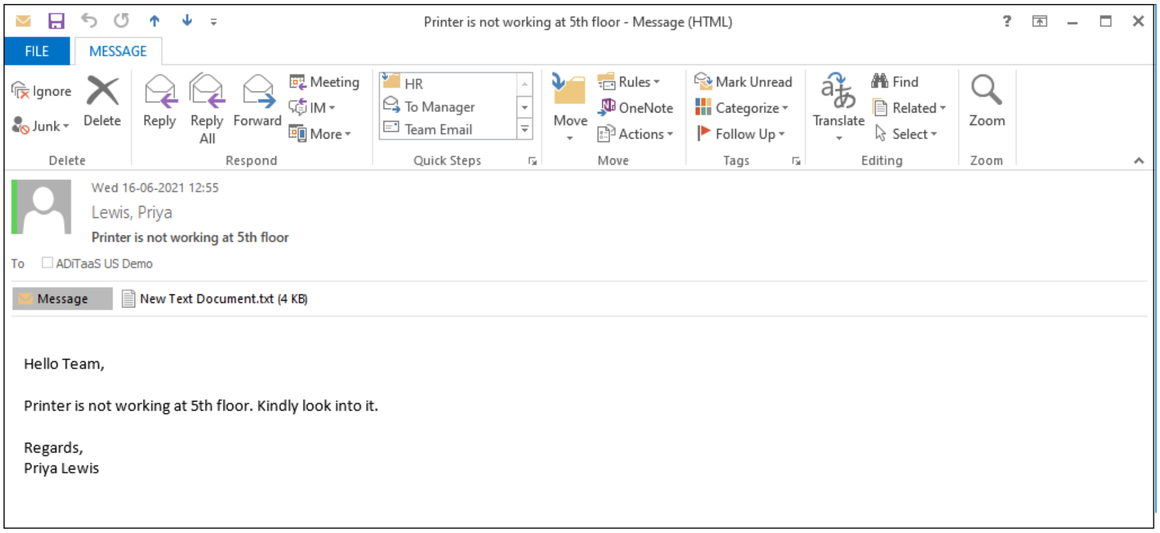


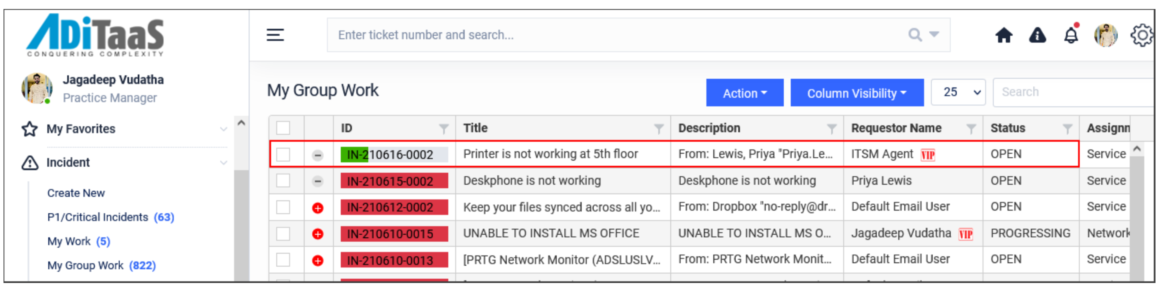
4. Once all the required mandatory are filled and click on **Submit** button.
5. Click on Add attachment button to add attachment during the ticket creation
6. New incident will be created with **unique incident ID** and an email notification is sent to confirm that the ticket has been logged.

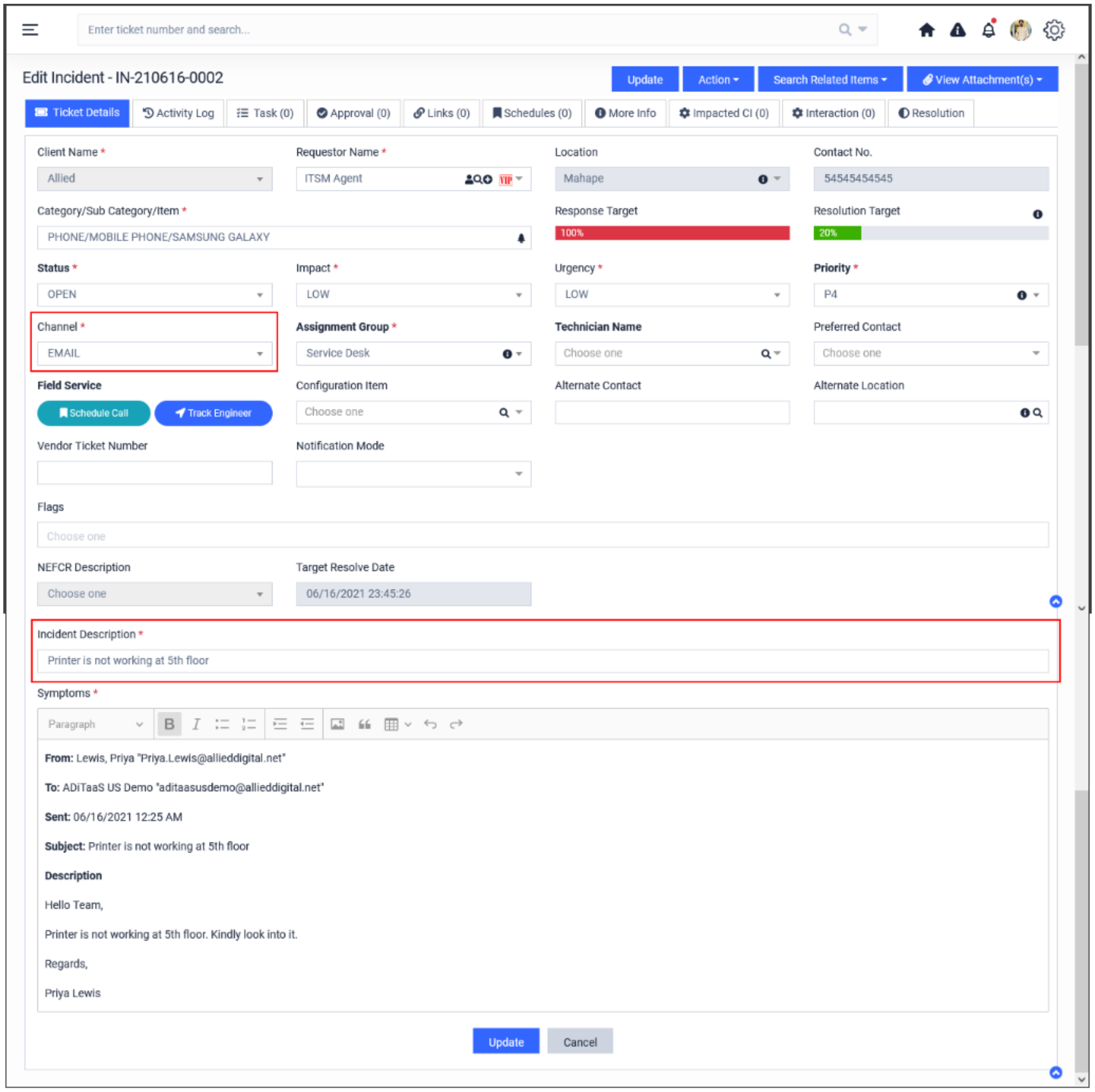


INCIDENT CREATED VIA EMAIL MANAGER

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

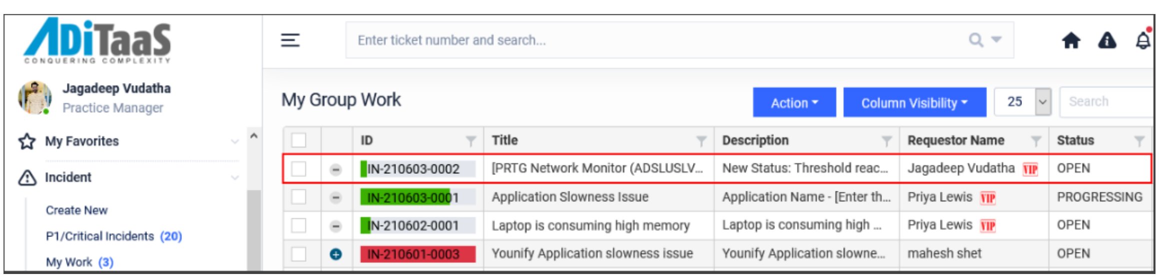

Printer is not working at 5th floor - Message (HTML)
FILE
MESSAGE
Ignore
Junk
Delete
Reply
Reply All
Forward
Meeting
IM
More
HR
To Manager
Team Email
Move
Rules
OneNote
Actions
Mark Unread
Categorize
Follow Up
Translate
Find
Related
Select
Zoom
Delete
Respond
Quick Steps
Move
Tags
Editing
Zoom
Wed 16-06-2021 12:55
Lewis, Priya
Printer is not working at 5th floor
To ADiTaaS US Demo
Message
New Text Document.txt (4 KB)
Hello Team,
Printer is not working at 5th floor. Kindly look into it.
Regards,
Priya Lewis

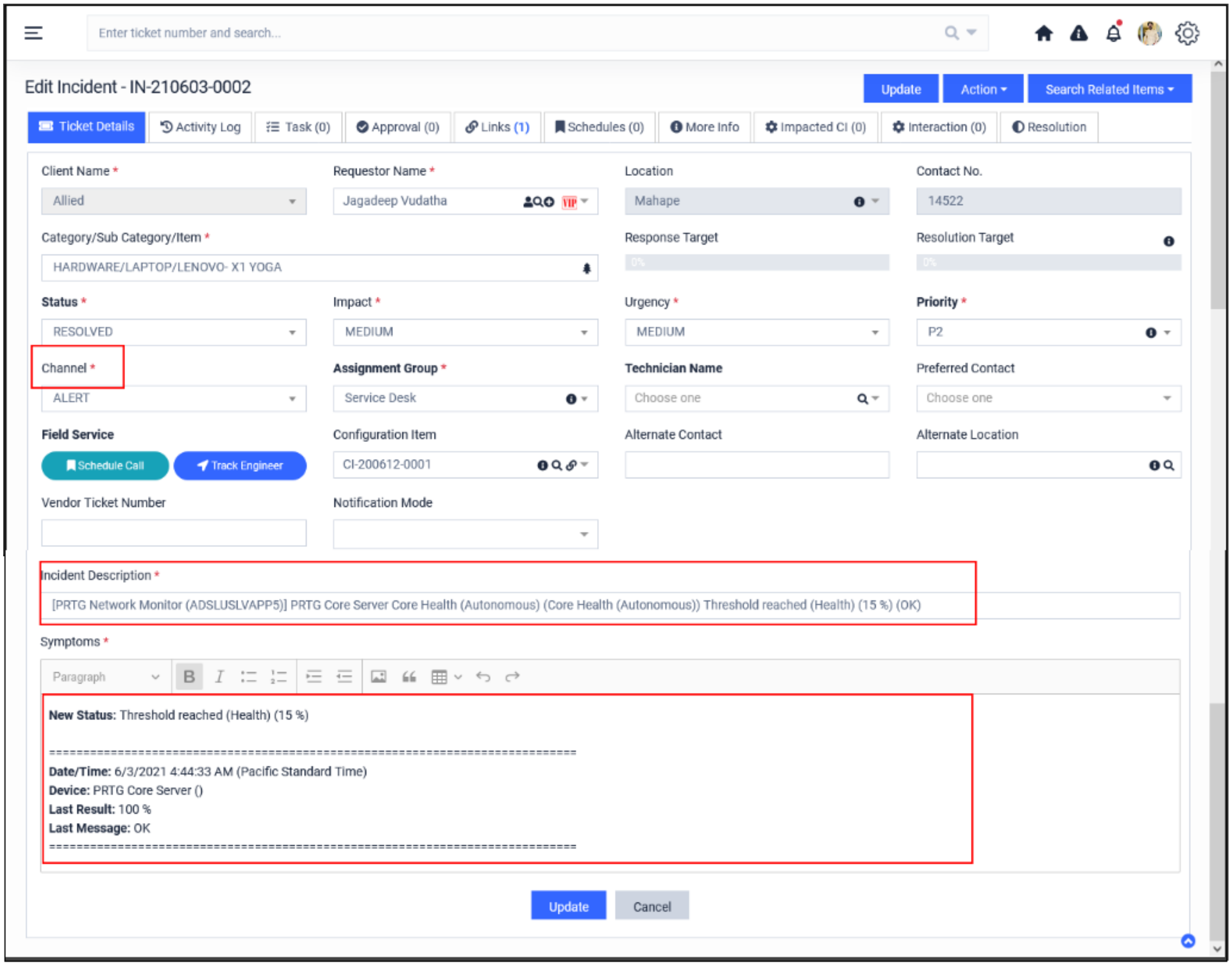

ADiTaaS
CONQUERING COMPLEXITY
Jagadeep Vudatha
Practice Manager
My Favorites
Incident
Create New
P1/Critical Incidents (63)
My Work (5)
My Group Work (822)
Enter ticket number and search...
My Group Work
Action
Column Visibility
25
Search
ID
Title
Description
Requestor Name
Status
IN-210616-0002
Printer is not working at 5th floor
From: Lewis, Priya "Priya.Le...
ITSM Agent
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
PROGRESSING
IN-210610-0013
[PRTG Network Monitor (ADSLUSLV...
From: PRTG Network Monit...
Default Email User
OPEN
Service



INCIDENT CREATED VIA MONITORING TOOL

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

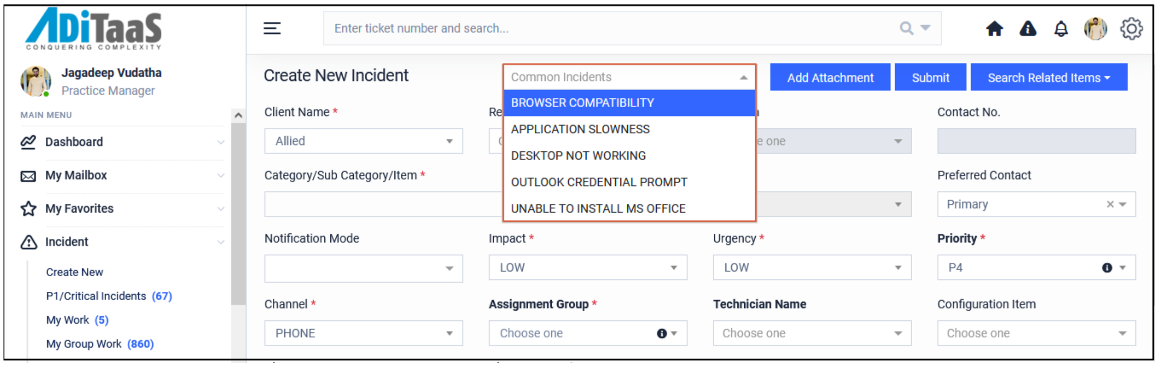




COMMON INCIDENTS

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 incident**s 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**

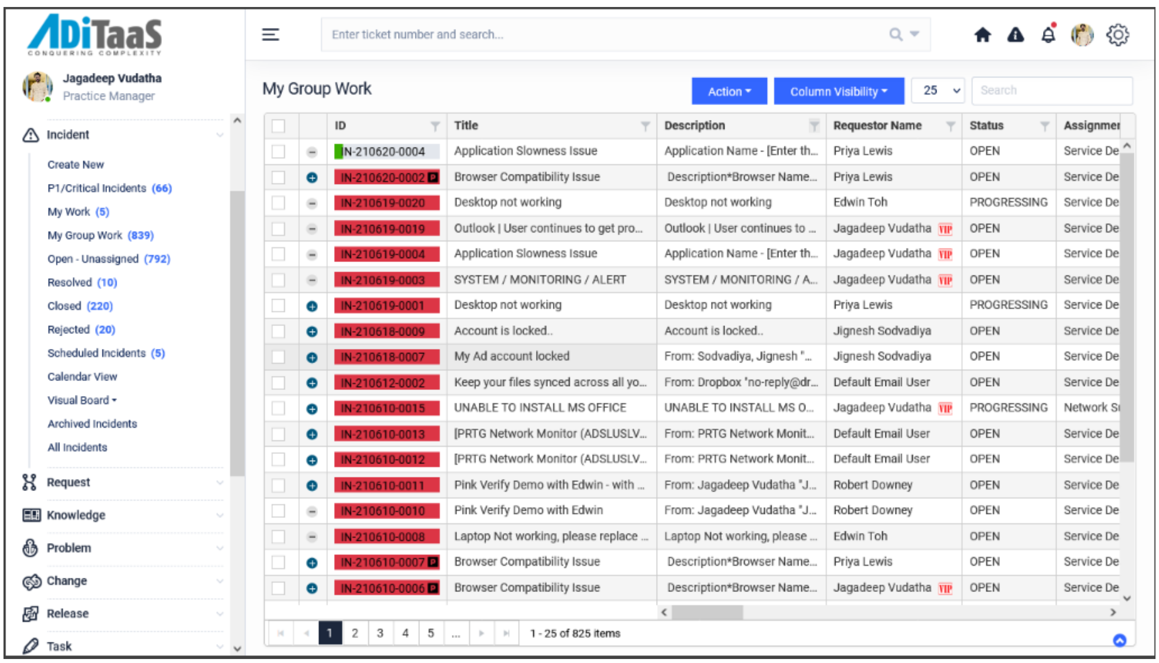


INCIDENT DATA GRIDS

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**'



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

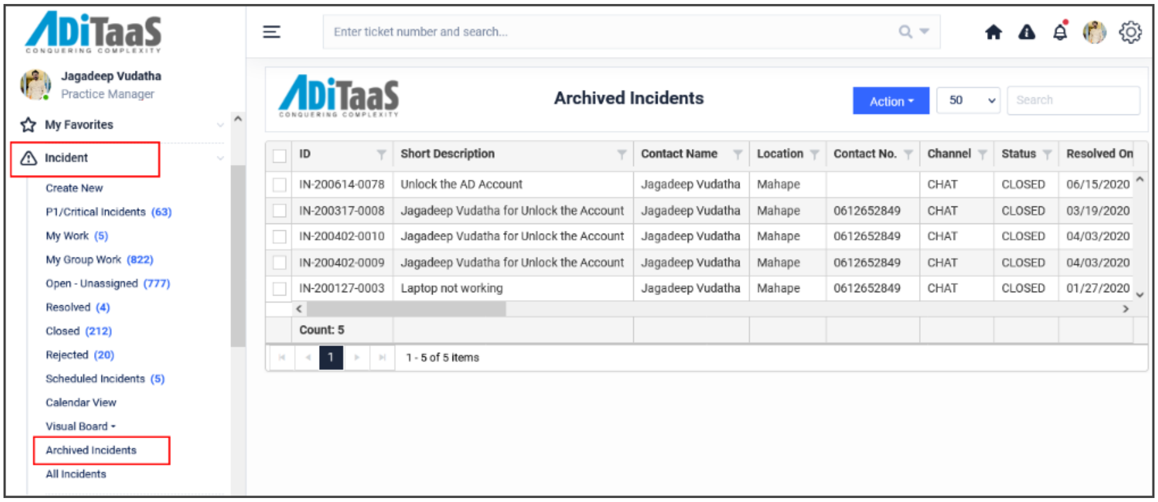
Calendar View- Displays scheduled incidents, set reminders on calendar view.

Archived Incidents

Displays all archived incidents

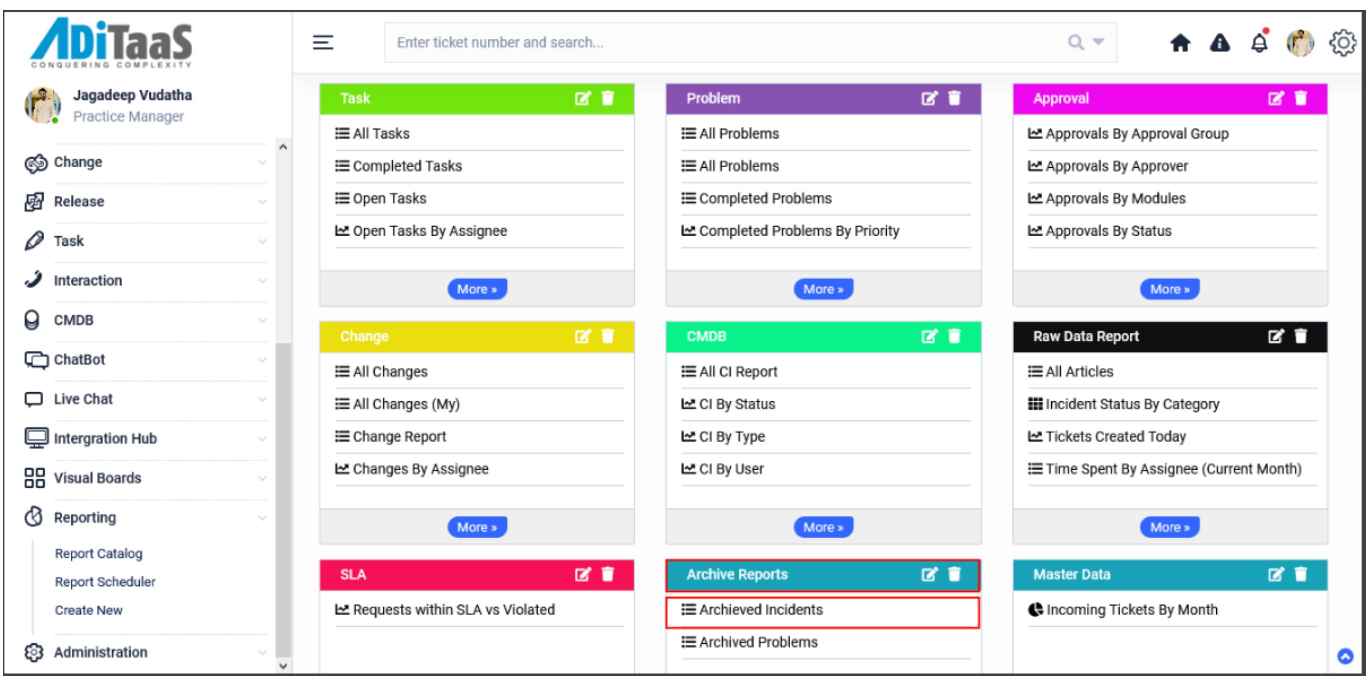
View Archived Incidents

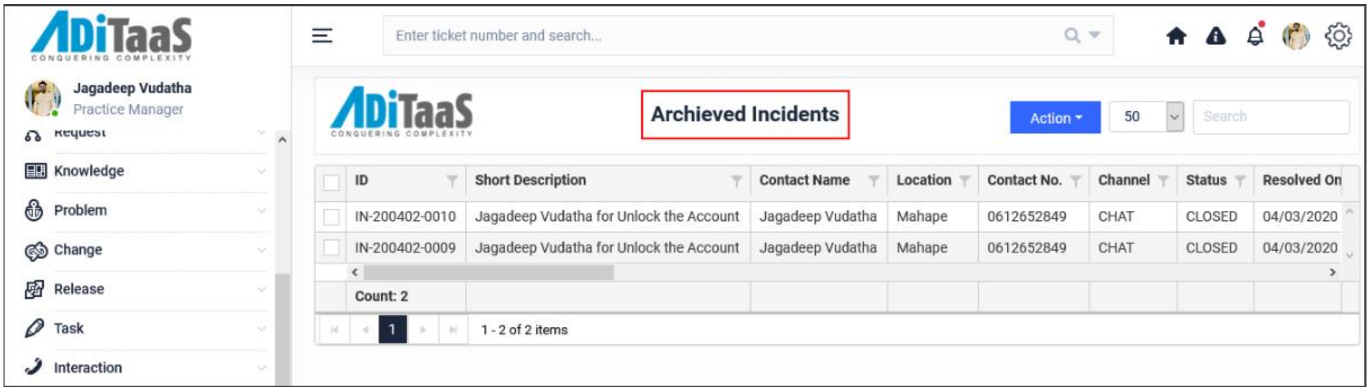
1. Navigate to Incident module from left menu bar
2. Click on Archived Incidents



View Archived Incidents Report

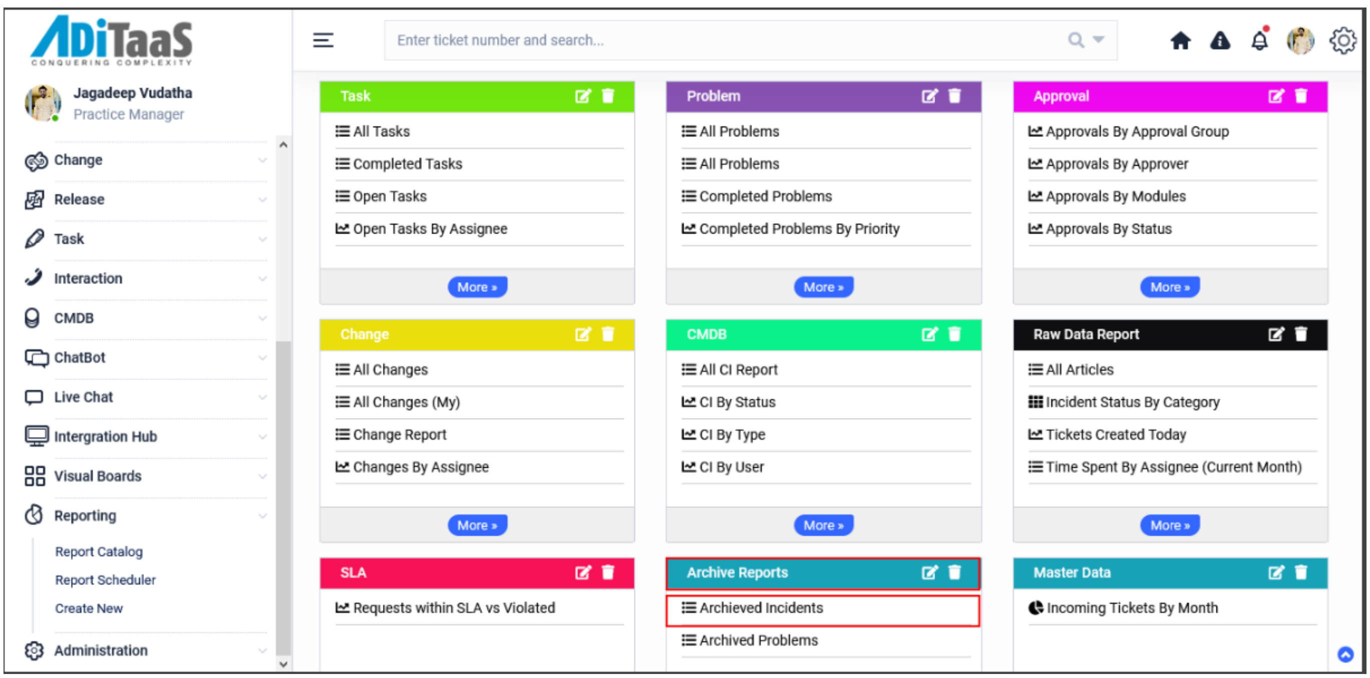
1. Navigate to Reporting module from left menu bar
2. Click on Report Catalog
3. Move to Archived Reports Widgets
4. Select Archived Incident Report to view all archived incident records

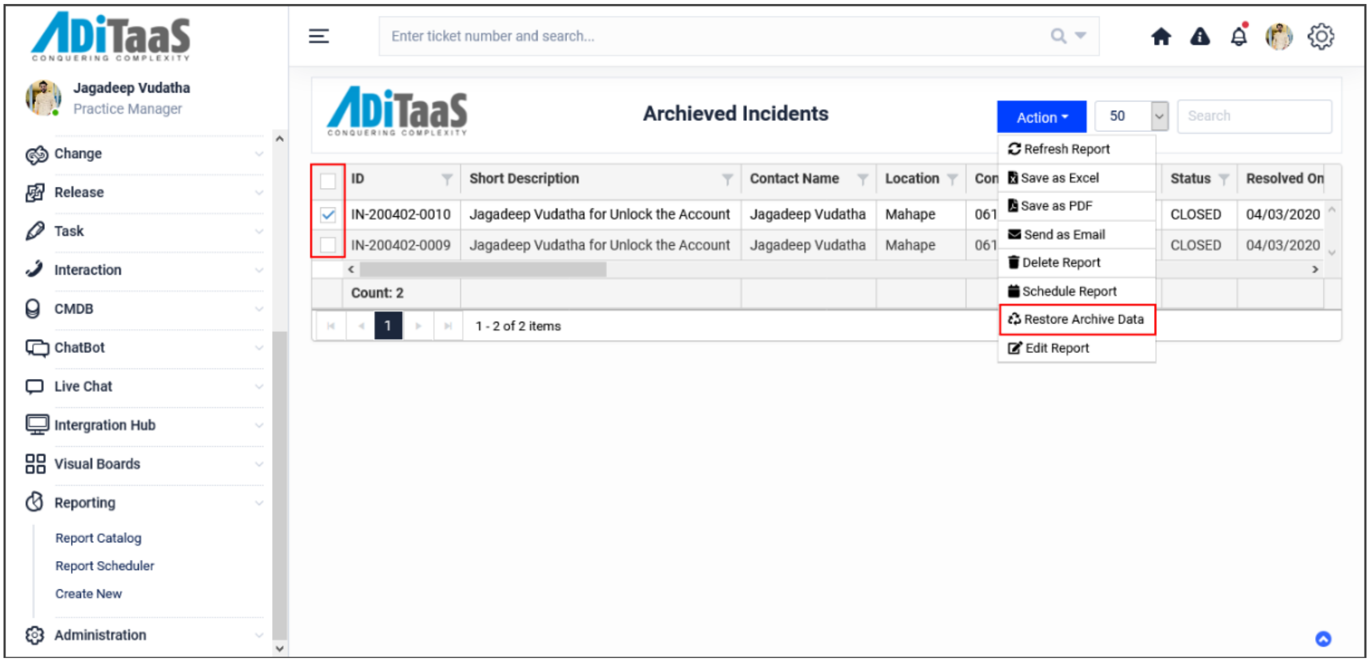


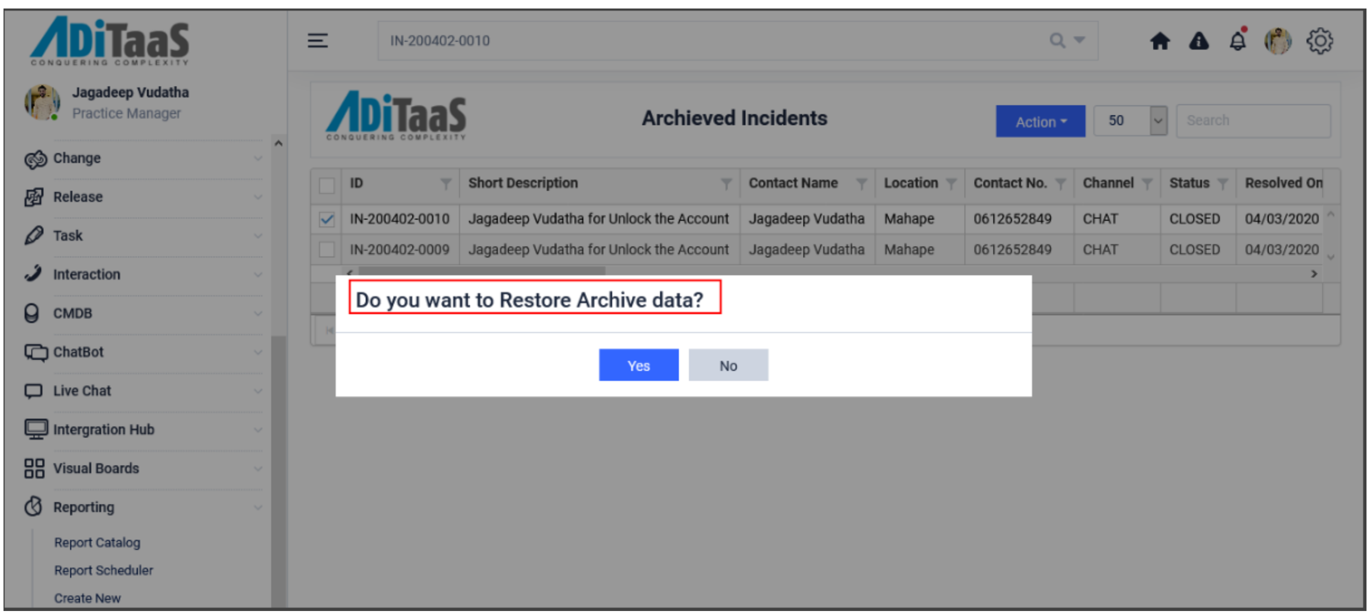


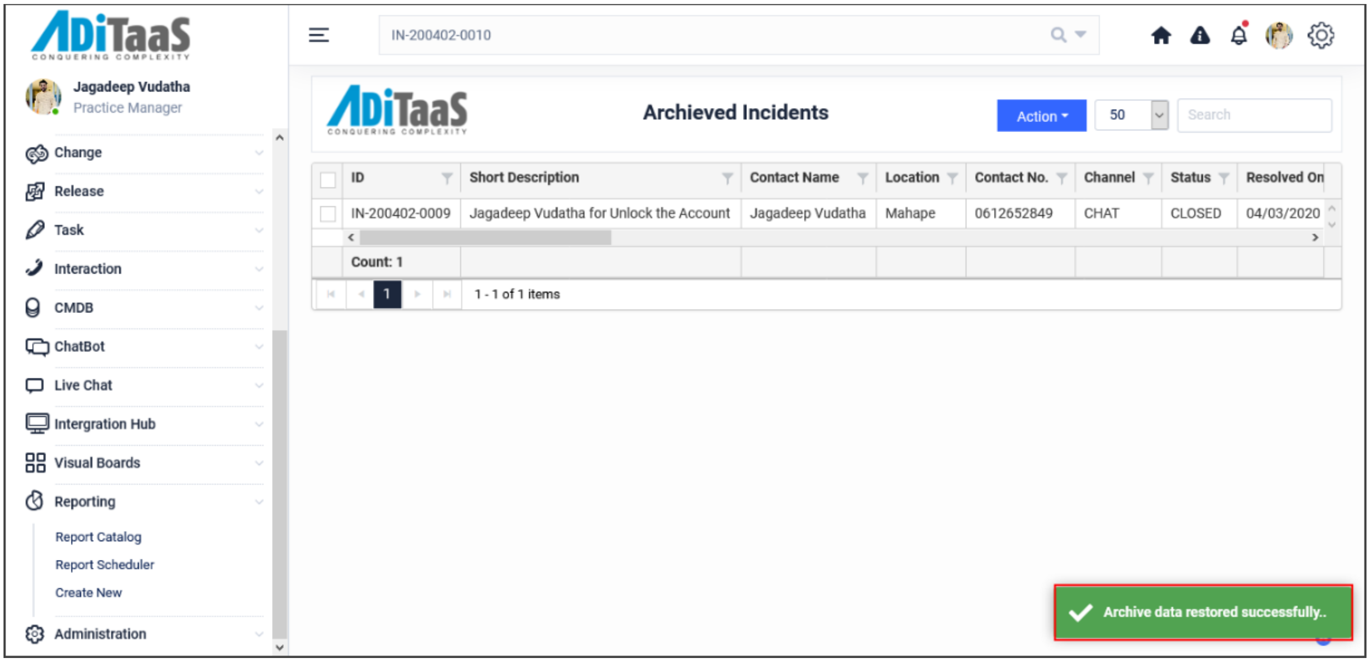
Restore Archived Records-

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




Enter ticket number and search...
Jagadeep Vudatha
Practice Manager
Change
Release
Task
Interaction
CMDB
ChatBot
Live Chat
Intergration Hub
Visual Boards
Reporting
Report Catalog
Report Scheduler
Create New
Administration
Archieved Incidents
Action
50
Search
Refresh Report
Save as Excel
Save as PDF
Send as Email
Delete Report
Schedule Report
Restore Archive Data
Edit Report
ID
Short Description
Contact Name
Location
Status
Resolved On
IN-200402-0010
Jagadeep Vudatha for Unlock the Account
Jagadeep Vudatha
Mahape
CLOSED
04/03/2020
IN-200402-0009
Jagadeep Vudatha for Unlock the Account
Jagadeep Vudatha
Mahape
CLOSED
04/03/2020
Count: 2
1 - 2 of 2 items


IN-200402-0010
Archieved Incidents
Action
50
Search
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
Do you want to Restore Archive data?
Yes
No



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

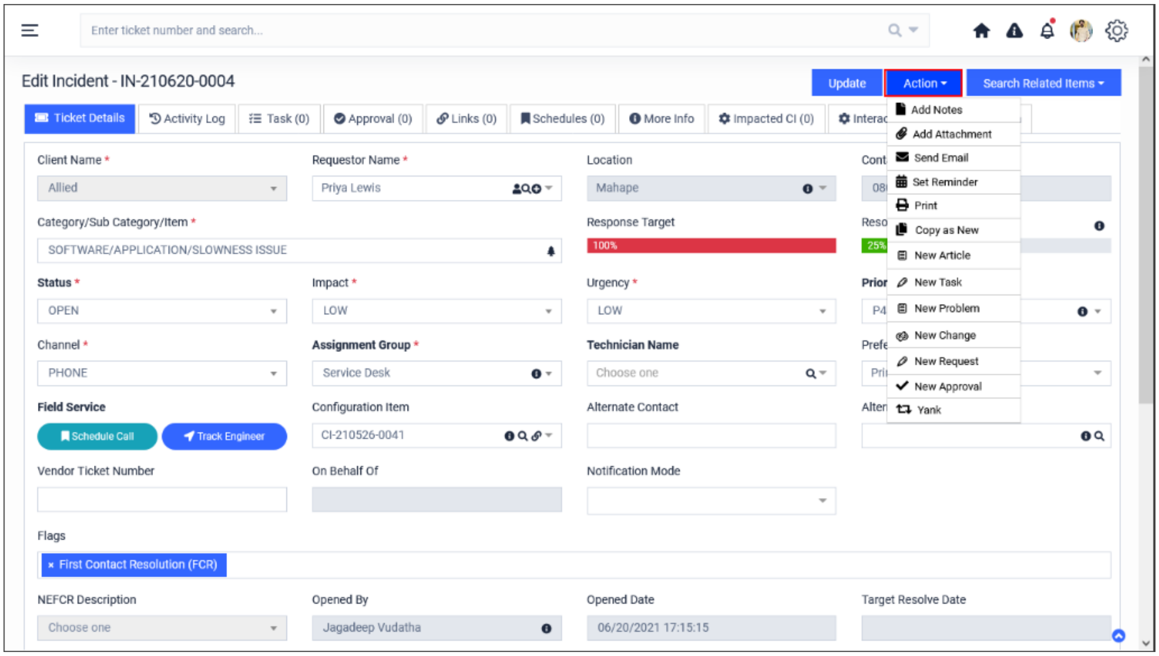
Restored records will be removed from Archived report and available on Active list.

All Incidents- Displays list of all incidents.

EDIT/ UPDATE INCIDENT

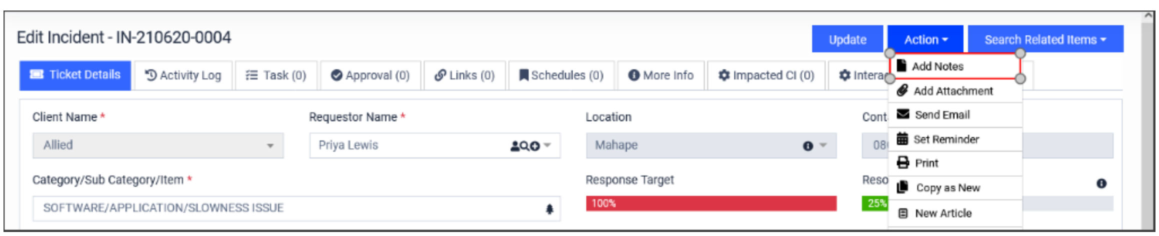
On successful creation of ticket, system will generate unique ticket id. Ticket id starts with date and number. **IN** indicates incident ticket.

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.

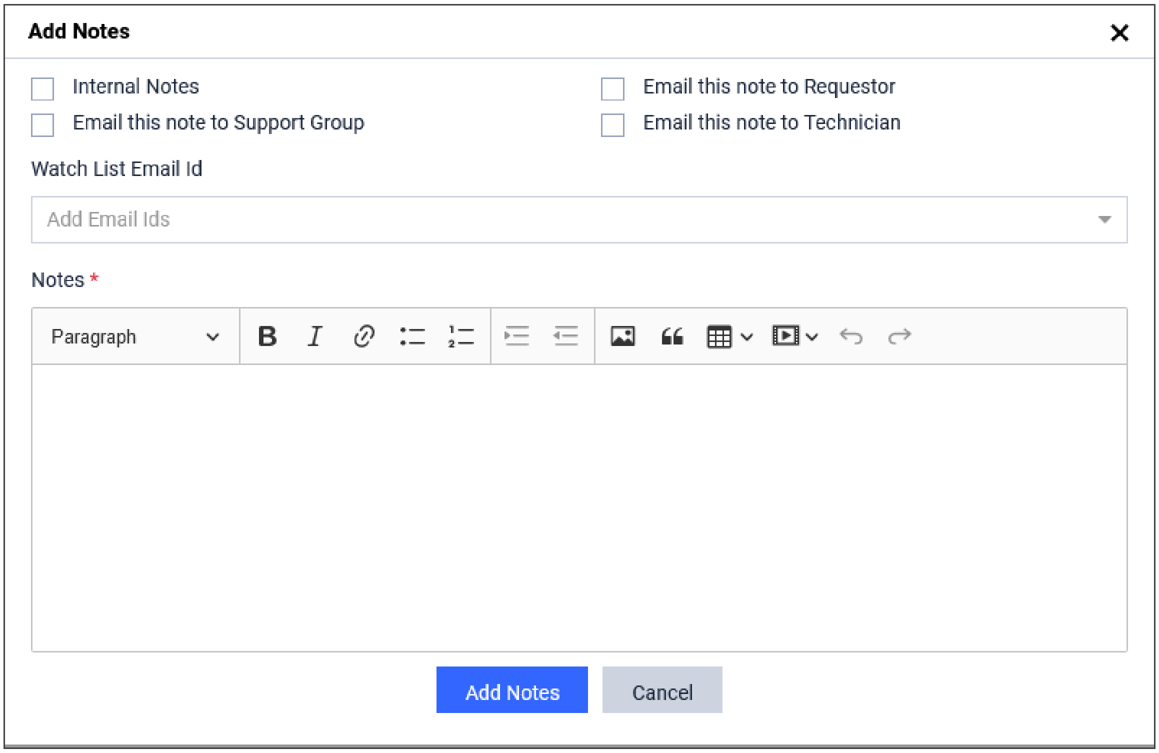


ADD NOTES

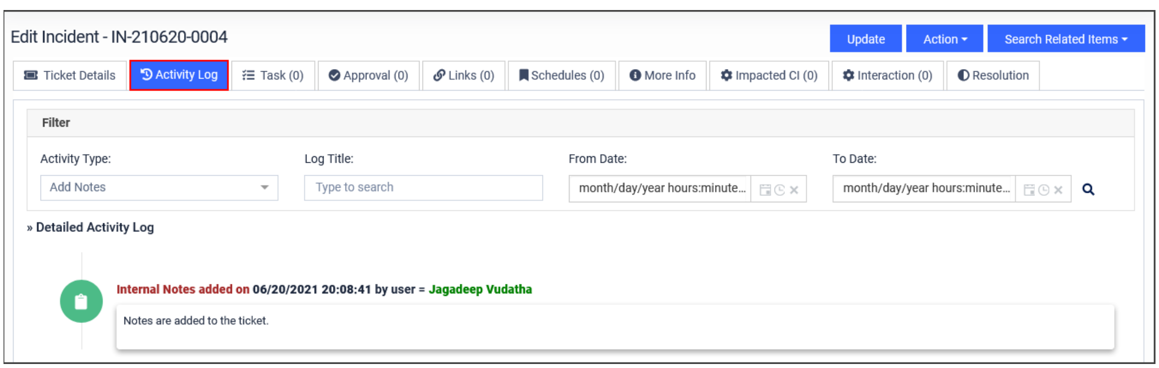
1. To add any additional information or work logs to ticket, click on **Action → Add Notes.**



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.

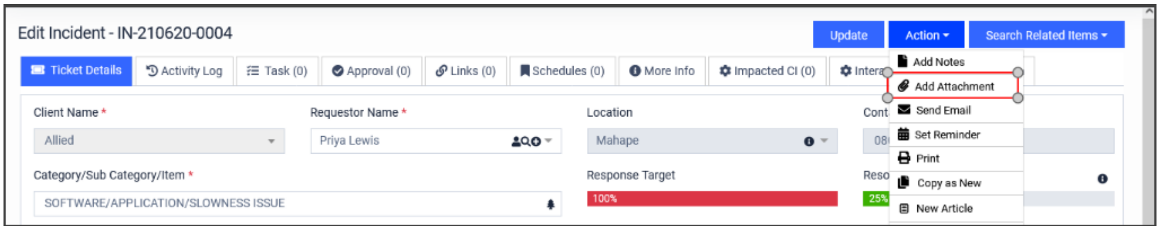


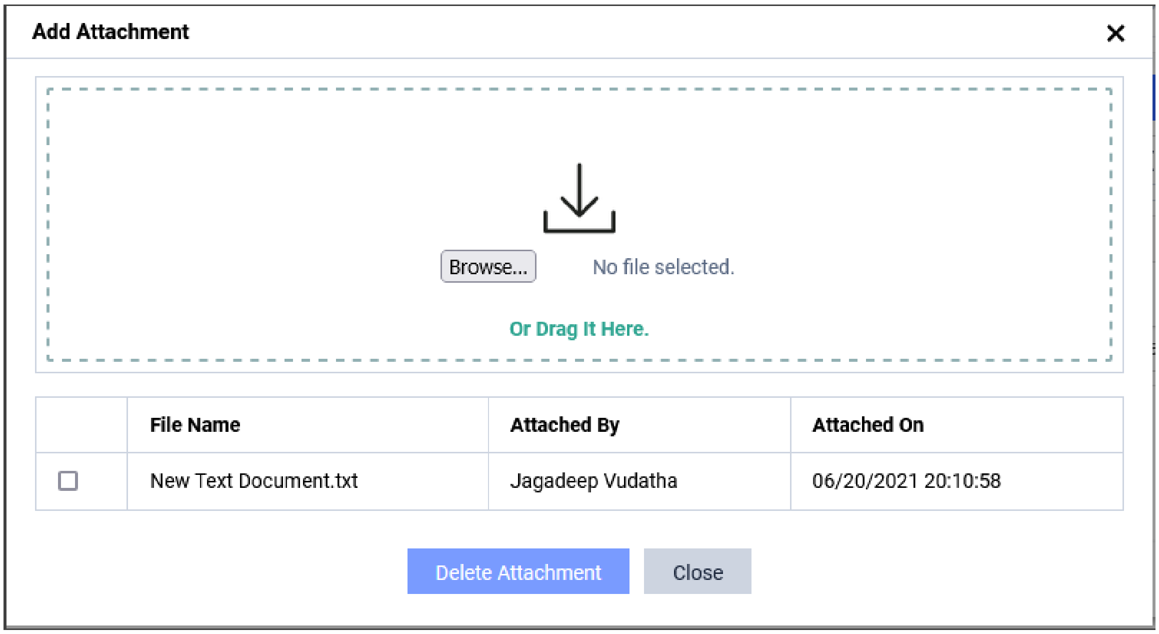
4. Enter the required comments/images/screenshots in the Notes section and click on **Add Notes.** Added information will be visible in **Activity Log**.



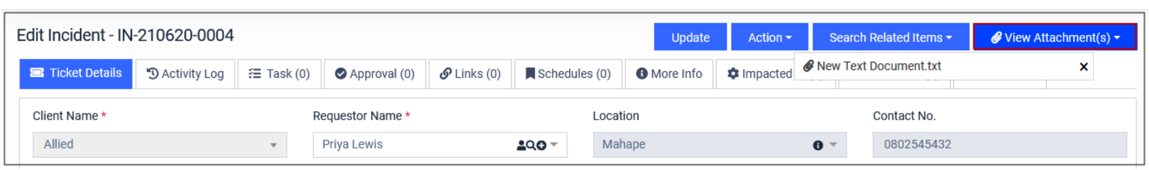
ADD ATTACHMENT:

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.



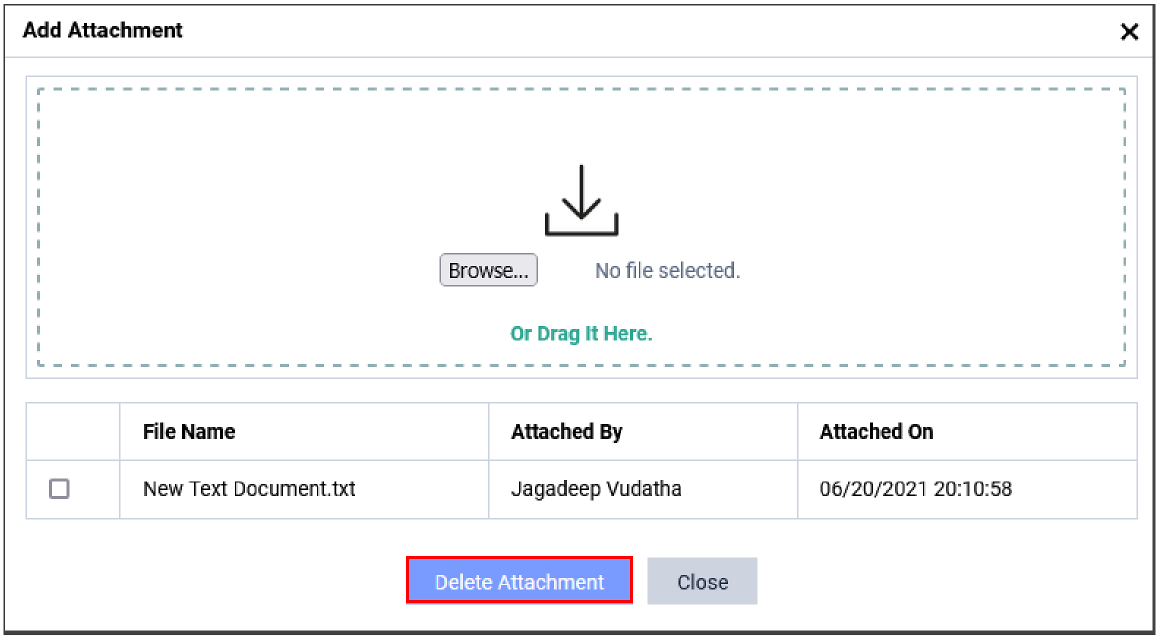


All Uploaded attachments will be visible Under '**View Attachment(s)**' tab.

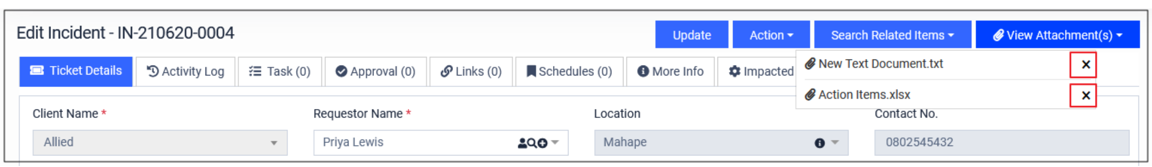


DELETE/ REMOVE ATTACHMENT:

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

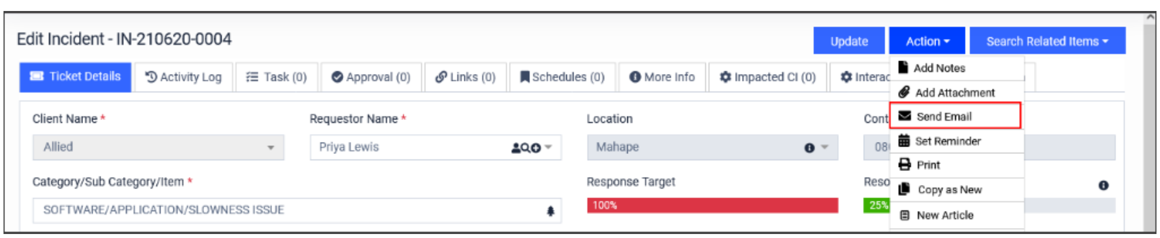


To quick delete an attachment , click on '**View Attachment(s)**' tab and go to respective attachment click on '**x**' placed next to it.

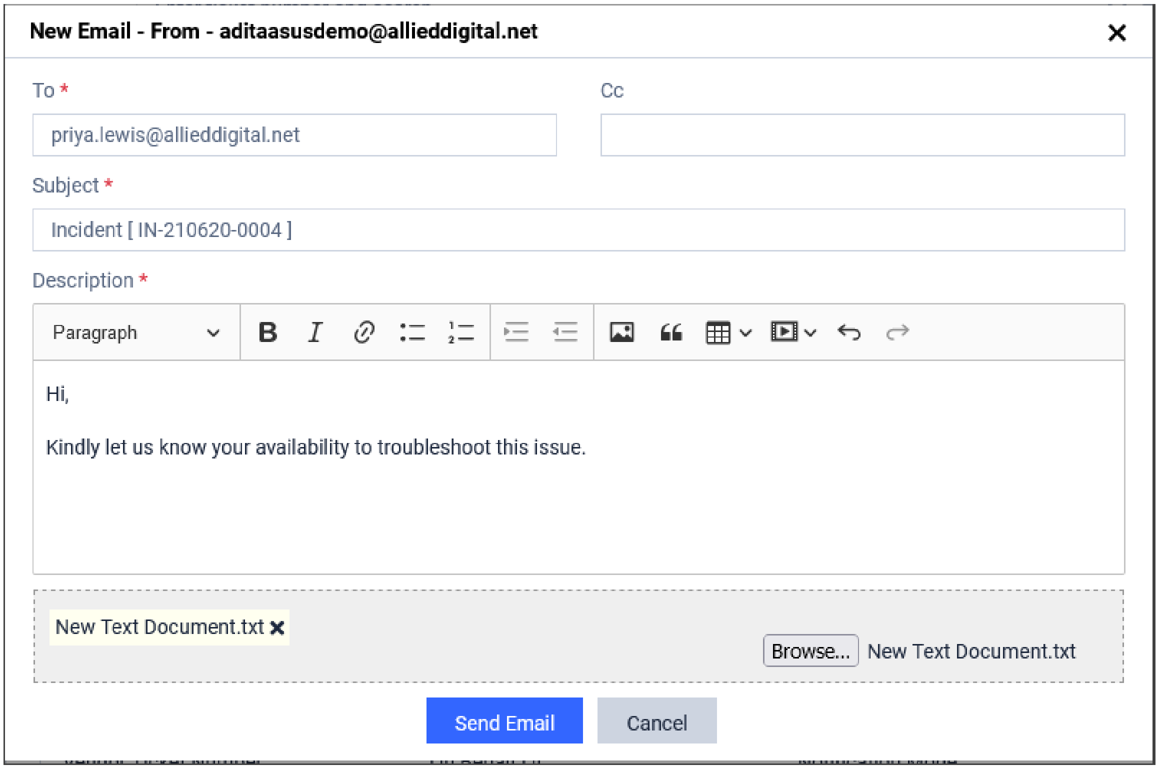


SEND MAIL:

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.

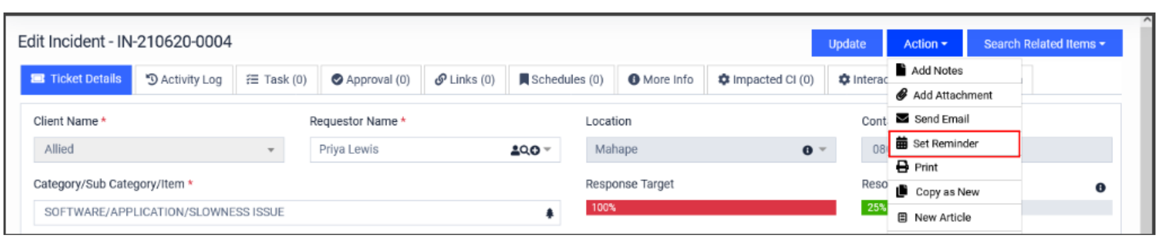


3. When complete, click on 'Send Email'. All actions are captured in Activity Log.

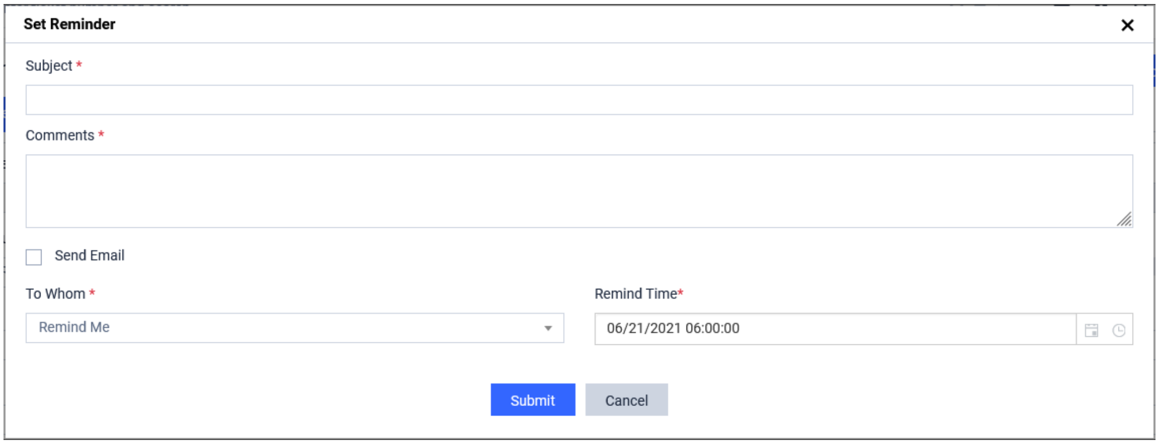
SET REMINDER

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.**

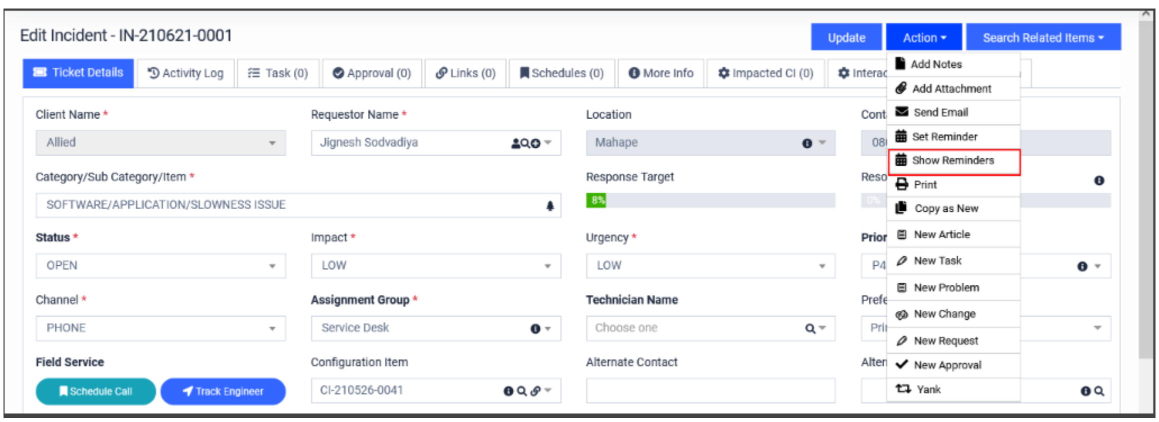


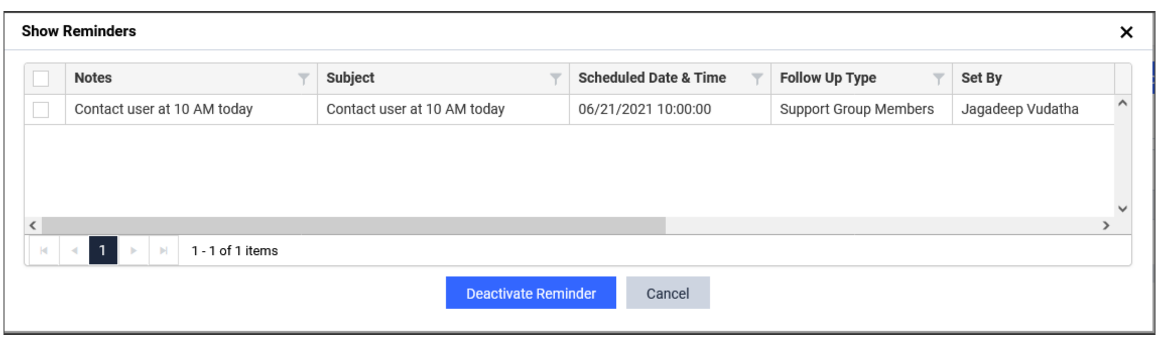
2. Set reminder dialog box is displayed. Enter the **Subject** and **Comments** in box.
3. Select checkbox, if required to send an email notification regarding the notification.
4. In select applicable option from '**To Whom**' drop down list.
    a. **Remind me** – Reminder will be set for logged in 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.

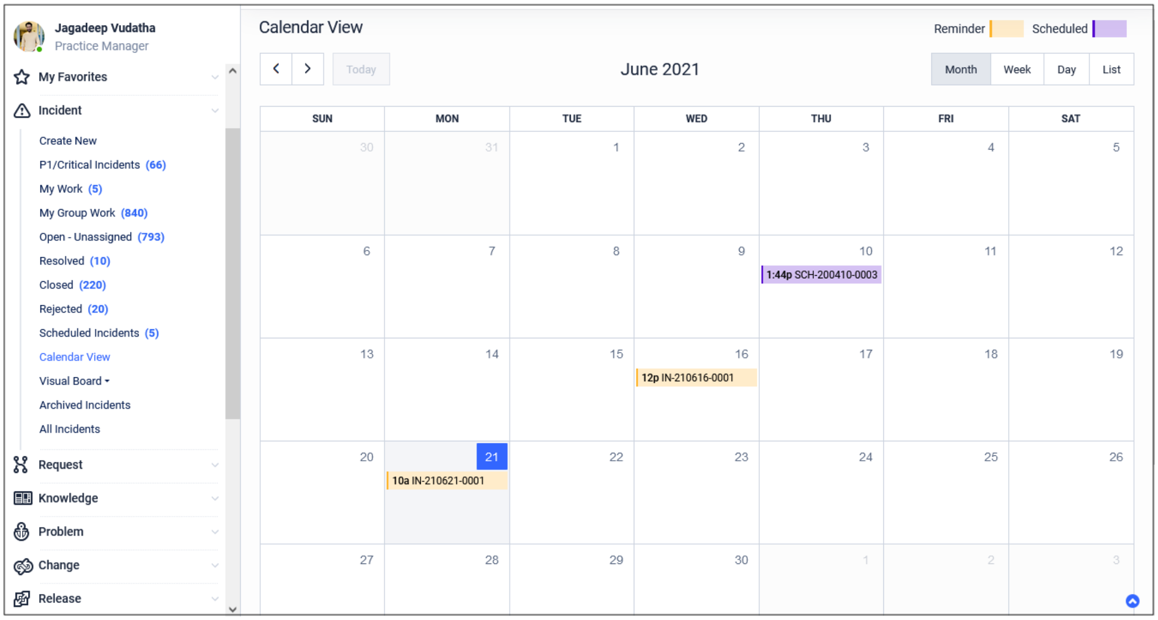


SHOW REMINDERS

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



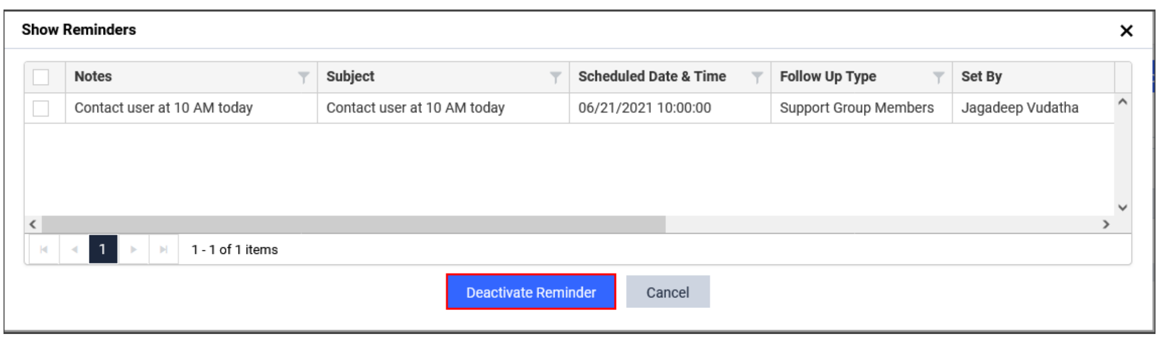




Deactivate the Reminder

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.



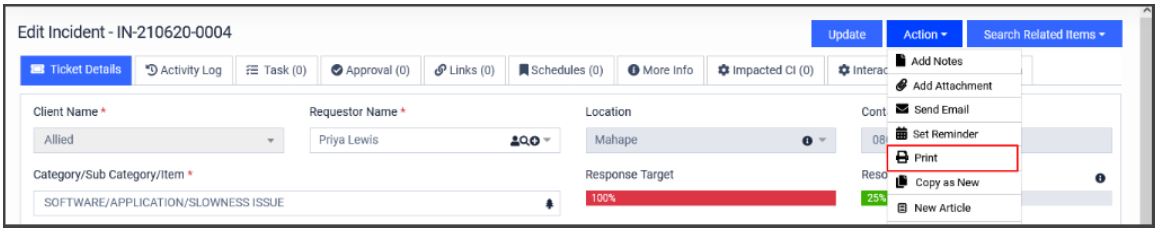
PRINT A INCIDENT

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)
Add Notes
Add Attachment
Send Email
Set Reminder
Print
Copy as New
New Article
Client Name *
Allied
Requestor Name *
Priya Lewis
Location
Mahape
Category/Sub Category/Item *
SOFTWARE/APPLICATION/SLOWNESS ISSUE
Response Target
100%
25%

Print Cancel

Incident Details

Number :	IN-210620-0004	**Client Name :**	Allied
Opened By :	Jagadeep Vudatha	**Opened Date :**	06/20/2021 17:15:15
Requestor Id :	priya.lewis	**Requestor Name :**	Priya Lewis
Location :	Mahape	**Email :**	priya.lewis@allieddigital.net
Mobile :	9876567898	**Contact No. :**	0802545432
Category :	SOFTWARE	**Sub Category :**	APPLICATION
Item :	SLOWNESS ISSUE	**Status :**	OPEN
Impact :	LOW	**Urgency :**	LOW
Priority :	P4	**Channel :**	PHONE
Assignment Group :	Service Desk	**Technician Name :**	
Configuration Item :	ABCABCINESDFCMDB0	**Target Resolve Date:**	
Alternate Location :		**Alternate Contact :**	
Vendor Ticket Number :		**On Behalf Of :**	
NEFCR Description :			
Incident Description :	Application Slowness Issue		
Symptoms :	Application Name - [Enter the application name] Number of Users Impacted - [Enter the number]		

More Info :

On Site :		**1st Response :**	
Time To Resolve :		**Escalation TS :**	
Misroute TS :		**Email Response :**	
Time To Investigate :		**Time To Diagnosis :**	

Resolution Details :

Resolution Method :		**Resolution CI :**	
Caused By :		**Resolution Criteria :**	
Resolution Date and Time :		**Resolved By :**	
Resolution Comments :			

Activity Log :

Email Sent On 06/21/2021 01:15:20 by user = SYSTEM.ADMIN

From :- aditaasusdemo@allieddigital.net
To :- jagadeep.vudatha@gmail.com
Subject :- Ticket [IN-210620-0004] has been assigned to Service Desk.
Event Name :- Business Rule Manager

Attachment added on 06/20/2021 20:18:31 by user = Jagadeep Vudatha

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

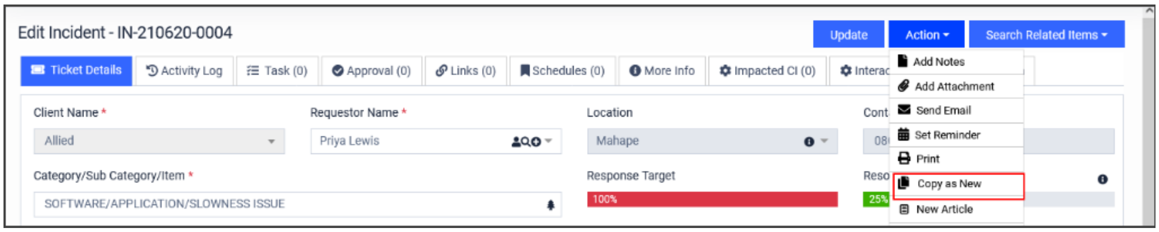
Attachment added on 06/20/2021 20:17:54 by user = Jagadeep Vudatha

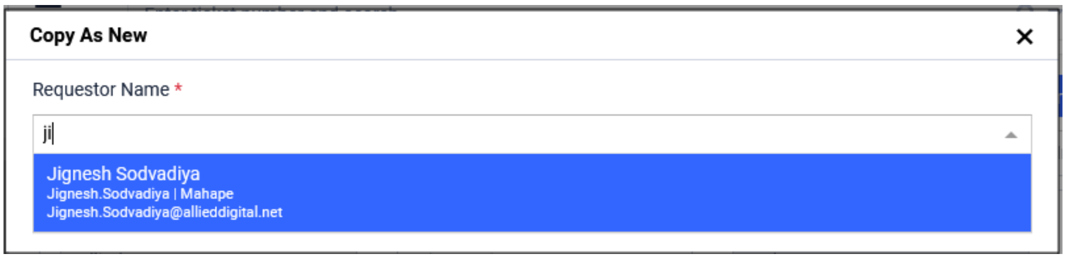
Attachment Name:- Action Items.xlsx, Added by user = Jagadeep Vudatha

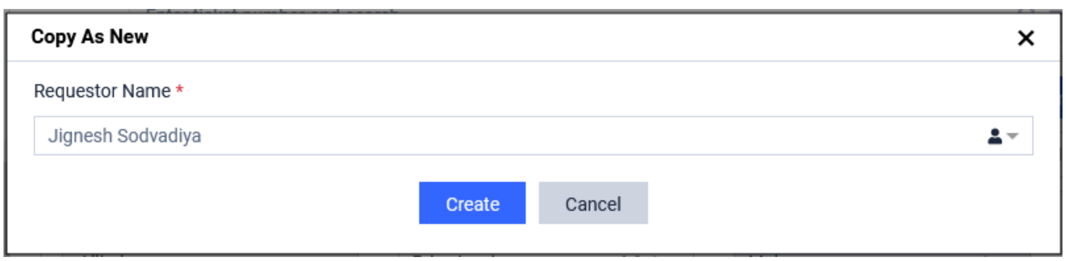
COPY AS NEW

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**



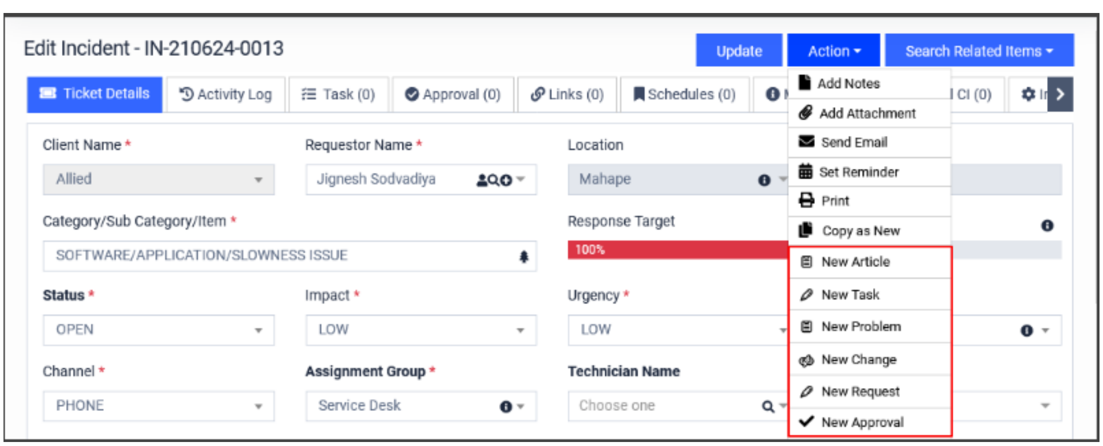




3. Search and select required **Requestor Name** and Click **Create.**

QUICK LINKS TO CREATE TICKETS FROM INCIDENT

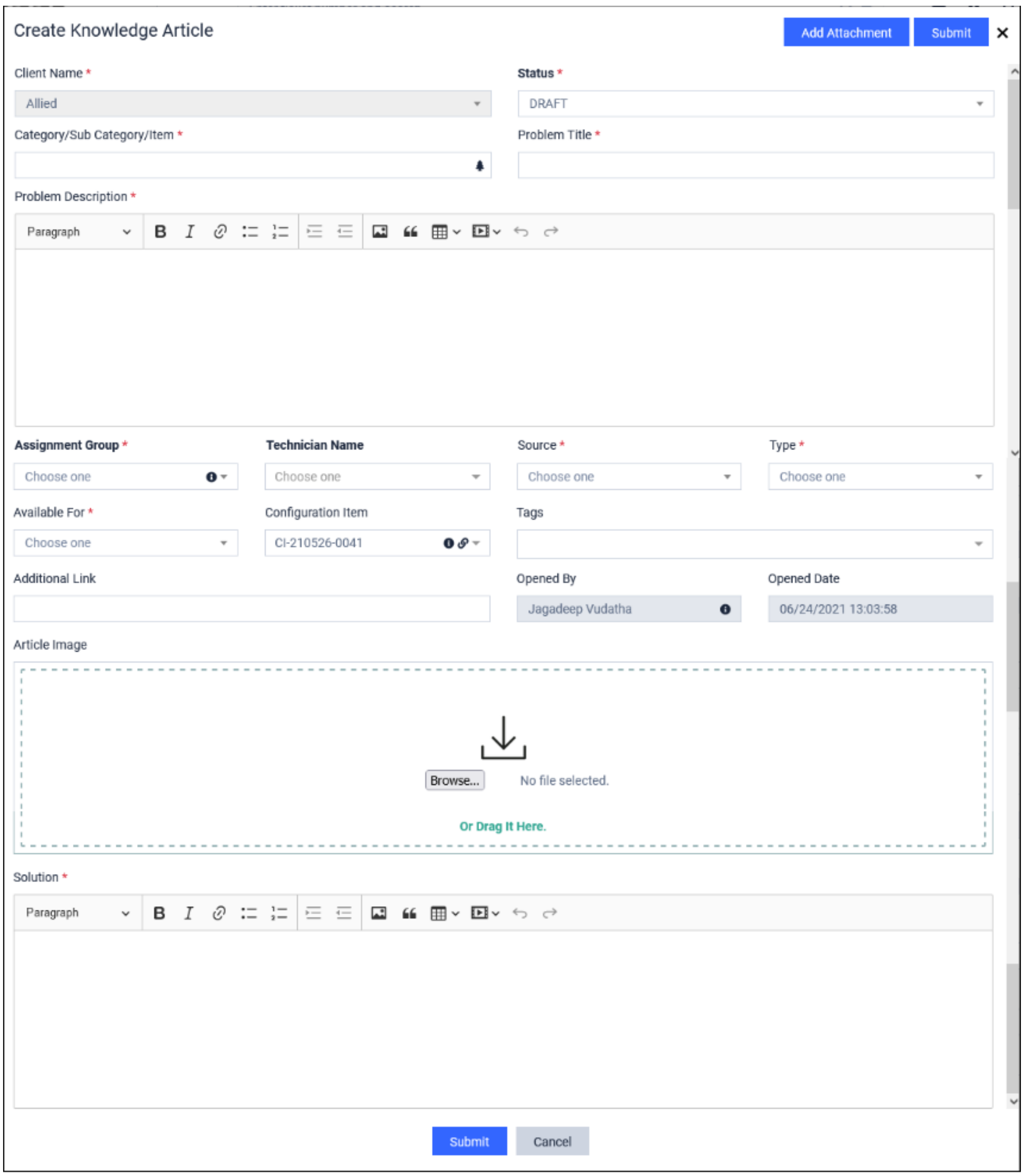
Following links helps to create other module tickets from incident ticket.



New Article

Allows to raise an article from incident ticket.

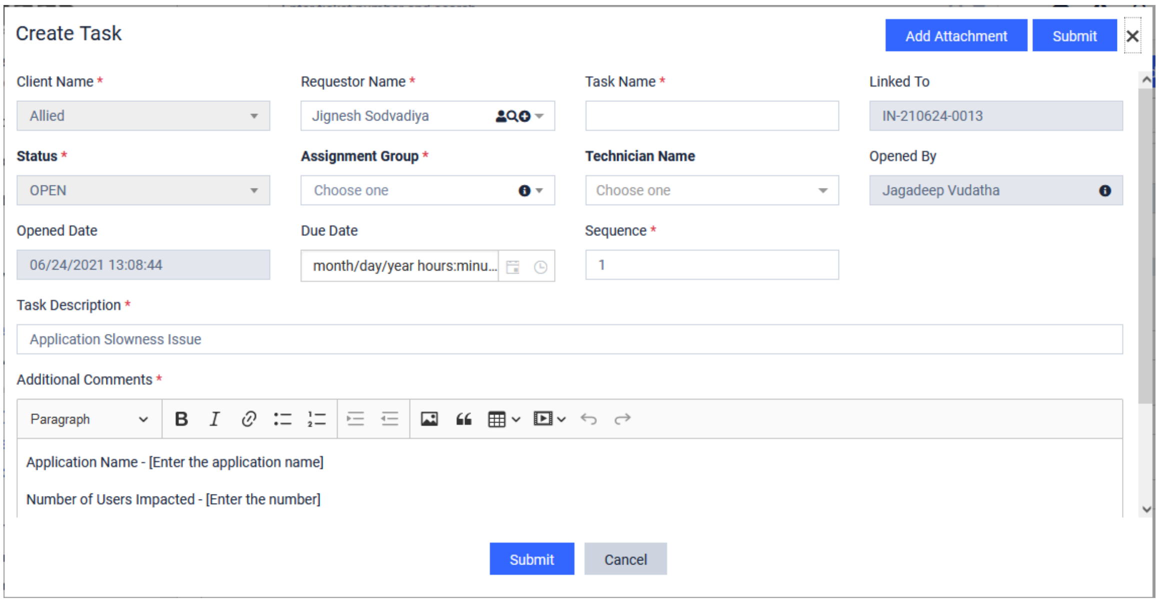
1. Go to **Action → New Article**
2. Enter the new article details and click on submit
3. New created article will be linked to incident ticket.



New Task

Allows to raise a new task ticket from incident ticket.

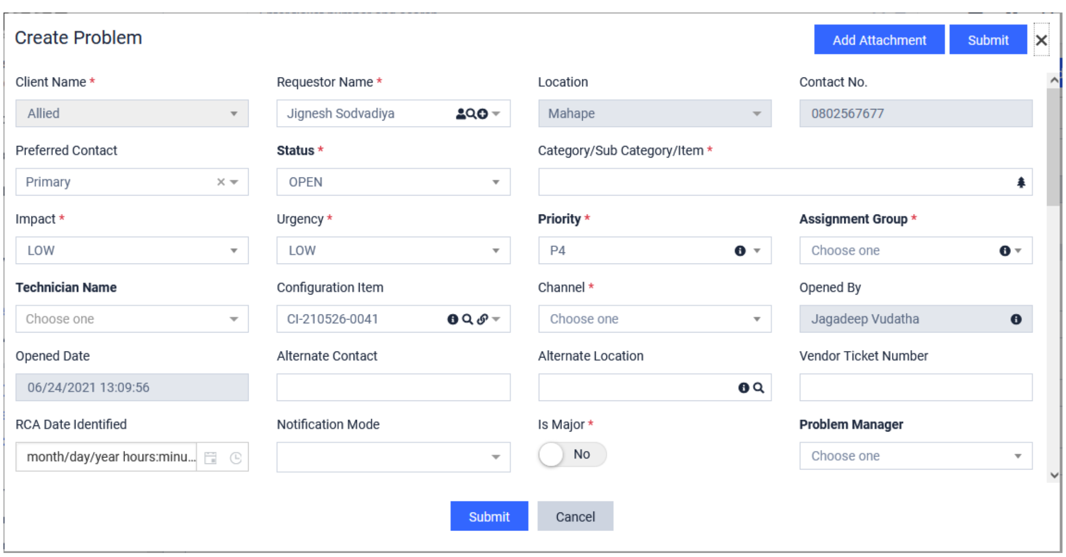
1. Go to **Action → New Task**
2. Enter the new task details and click on submit
3. New created task ticket will be linked to incident ticket.



New Problem

Allows to raise a new problem ticket from incident ticket.

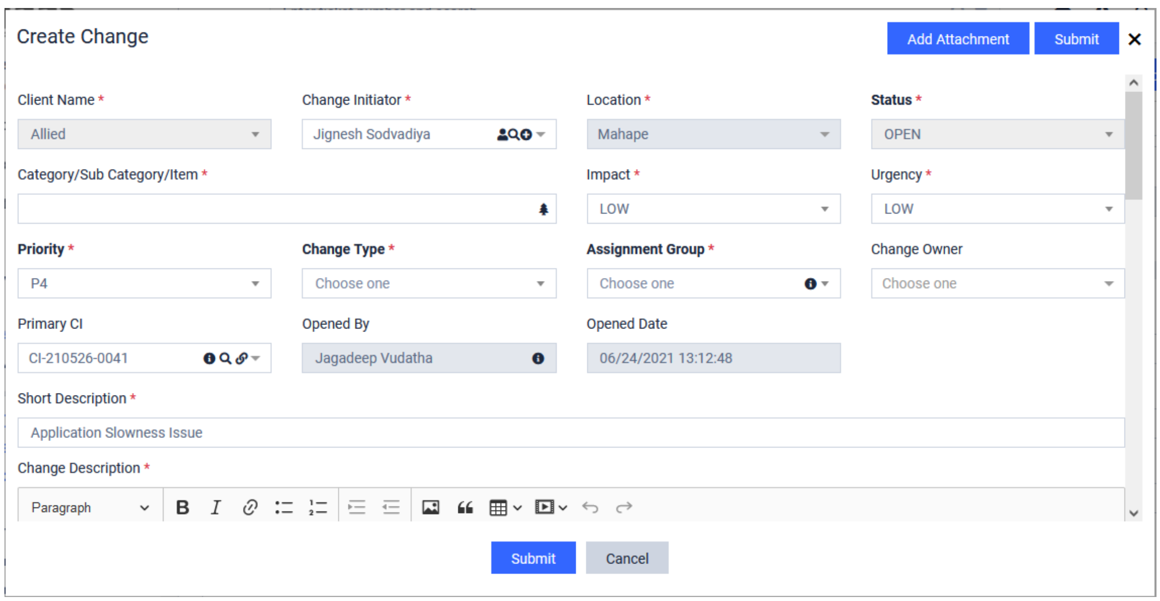
1. Go to **Action → New Problem**
2. Enter the new problem details and click on submit
3. New created problem ticket will be linked to incident ticket.



New Change

Allows to raise a new change ticket from incident ticket.

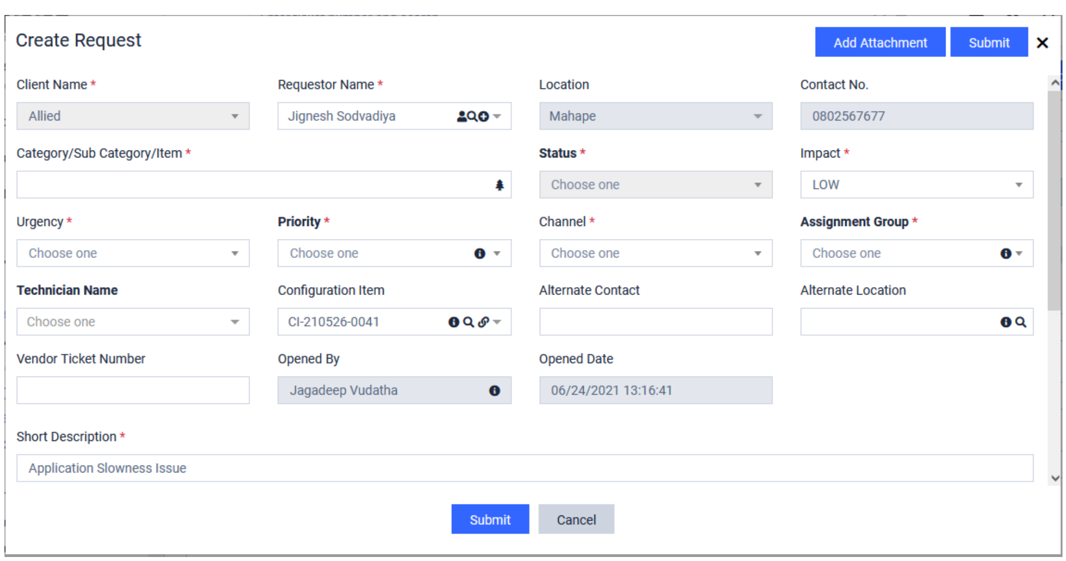
1. Go to **Action → New Change**
2. Enter the new change details and click on submit
3. New created change ticket will be linked to incident ticket.



New Request

Allows to raise a new request ticket from incident ticket.

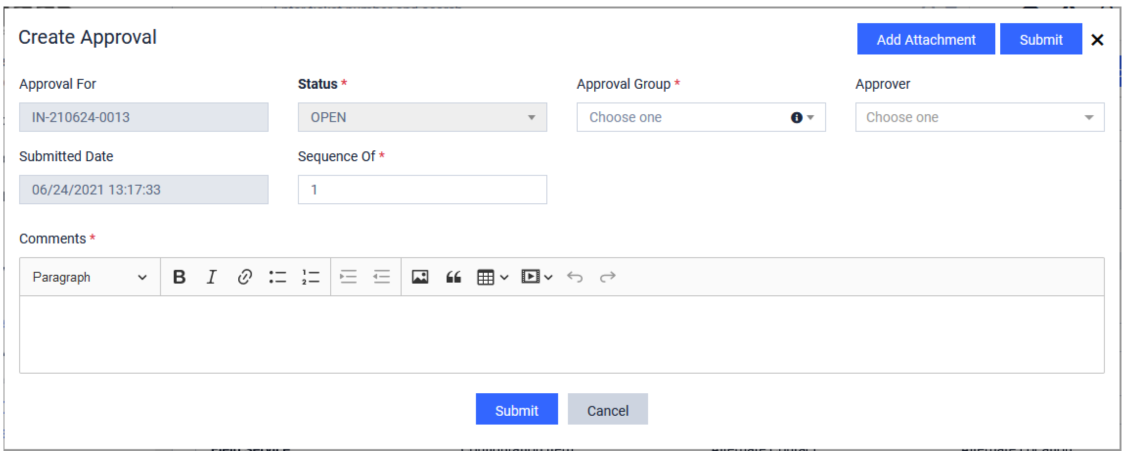
1. Go to **Action → New Request**
2. Enter the new request details and click on submit
3. New created request ticket will be linked to incident ticket.



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

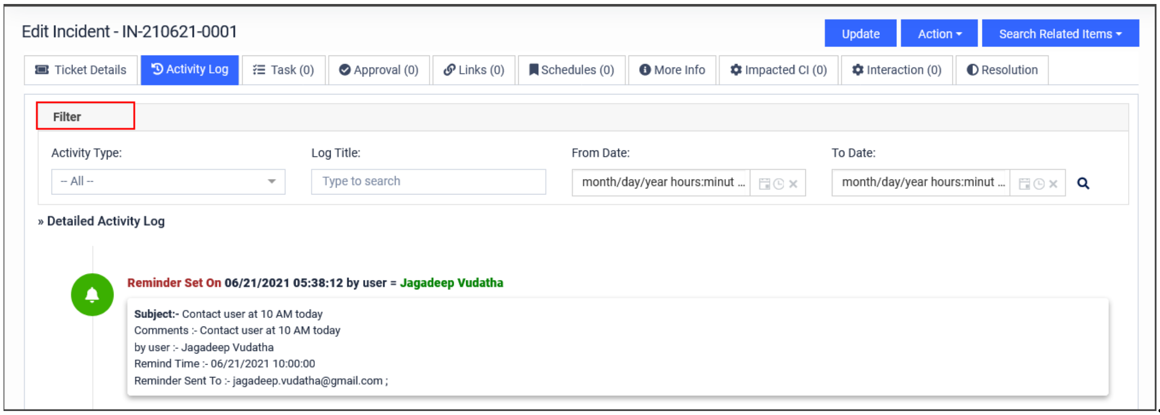
Activity log captures all actions performed on ticket from ticket creation to closure with date/time stamp along with agent id. All modification performed on ticket is auto captured. Activity log helps to determined order in which activities are performed on the ticket. From the creation of ticket to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

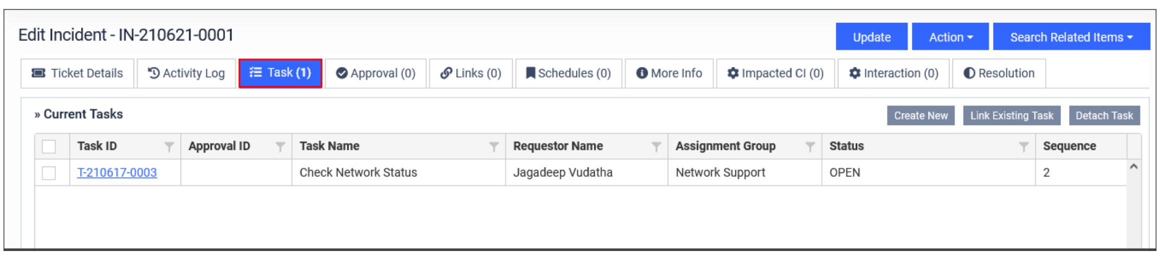


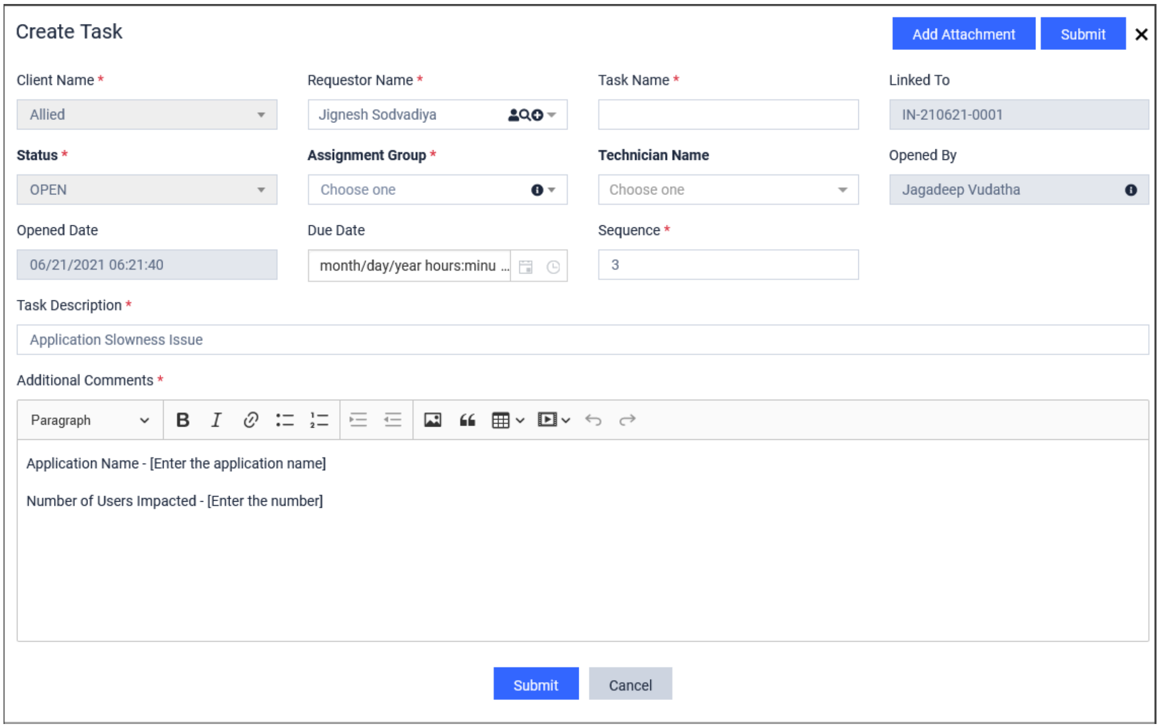
Note: Logs in the tool protected from alteration after-the-fact.

TASK

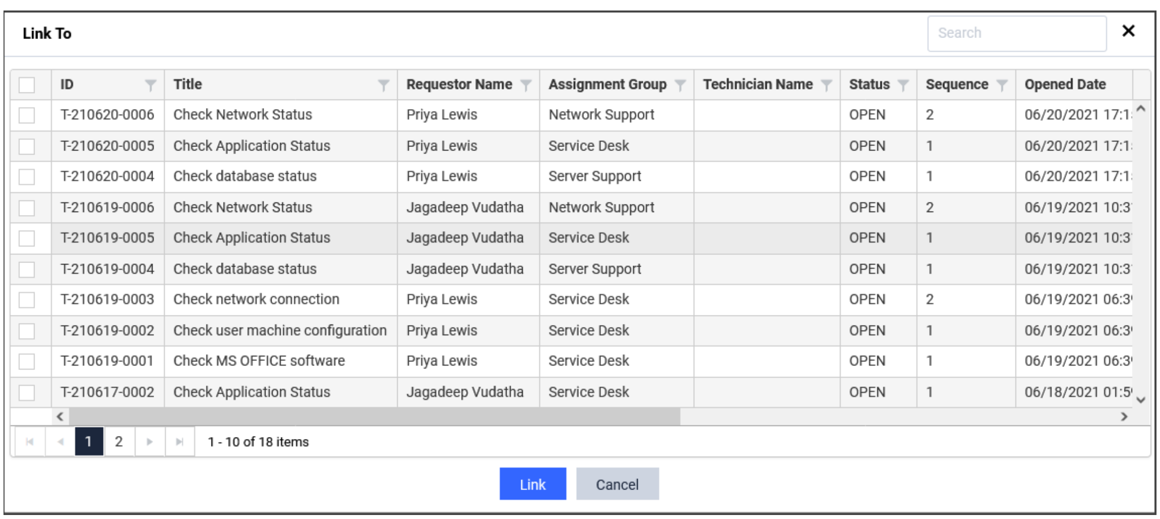
Agent can create a new Task and link to incident or open any existing tasks and can link to incident. Incident ticket cannot be resolved until all linked tasked are closed.

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



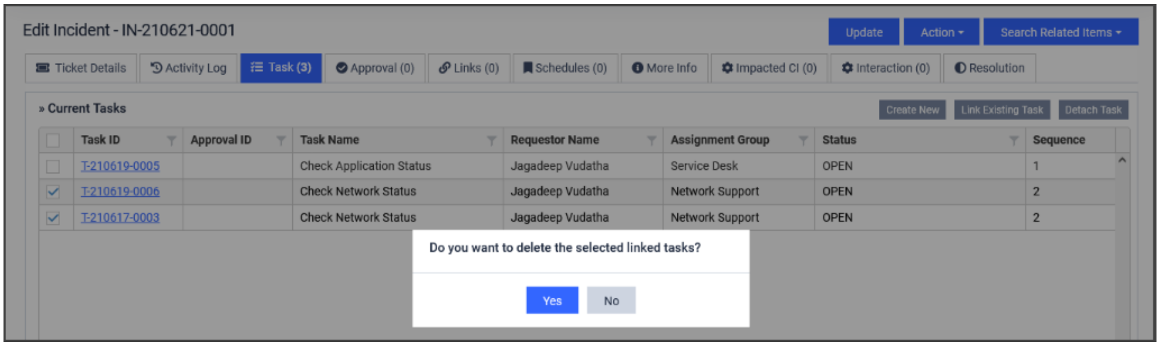


Link Existing Task- To link existing link Tasks, click on **Task → Link Existing Task** Displays list of existing Tasks. Agent can link one or more tasks to incident by clicking on checkboxes.



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

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



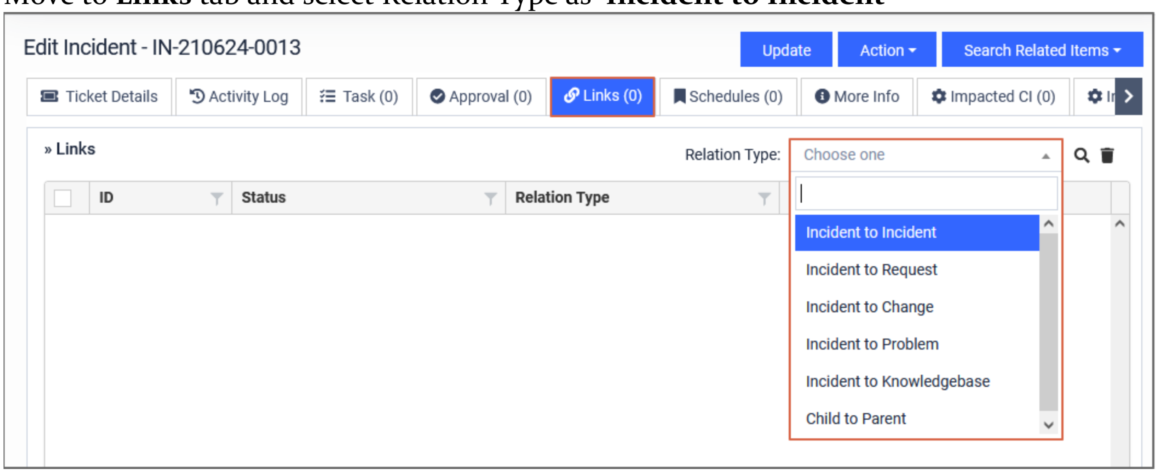
LINKING TICKETS

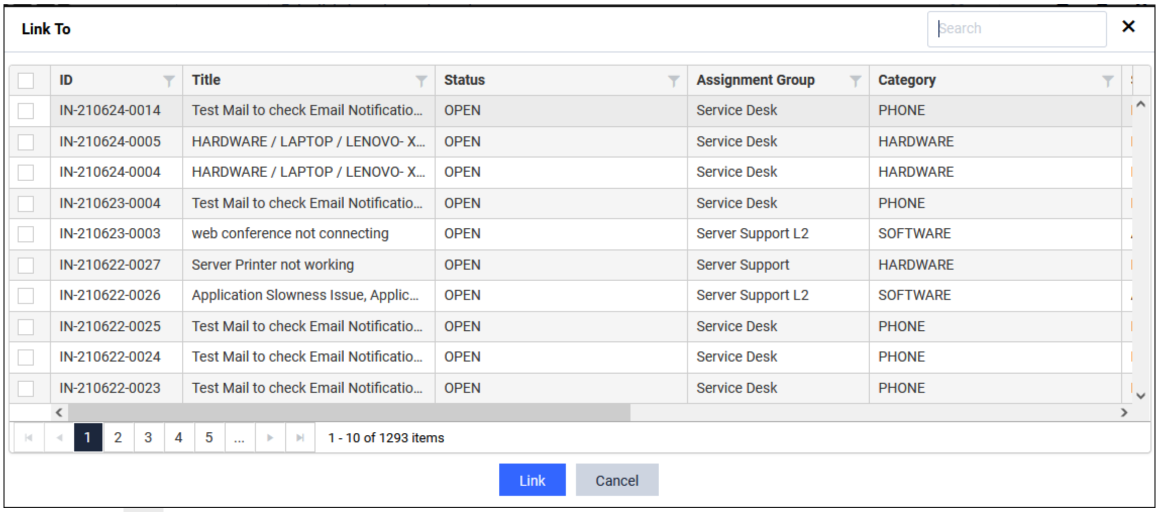
This tab allows agents to create relationships by linking incidents to other tickets in system.

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**'

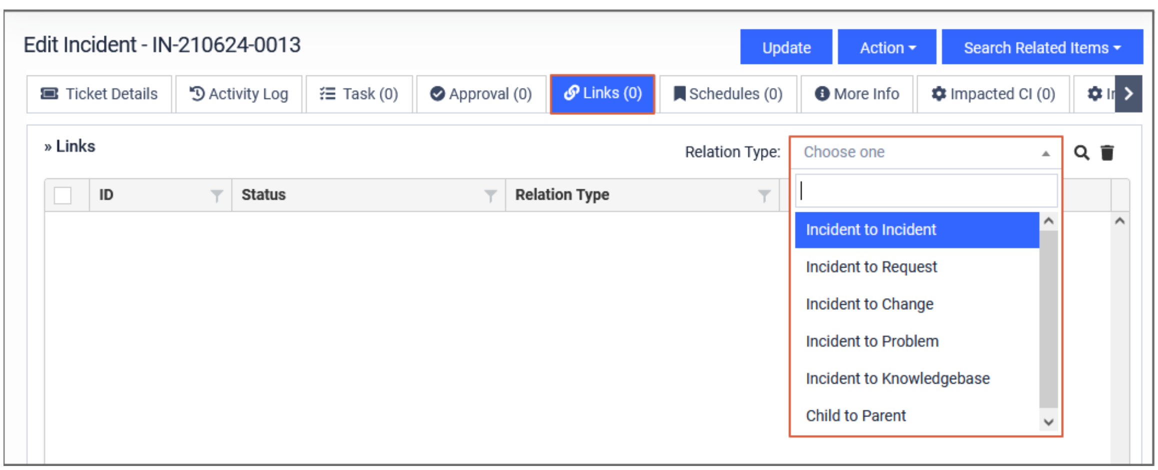


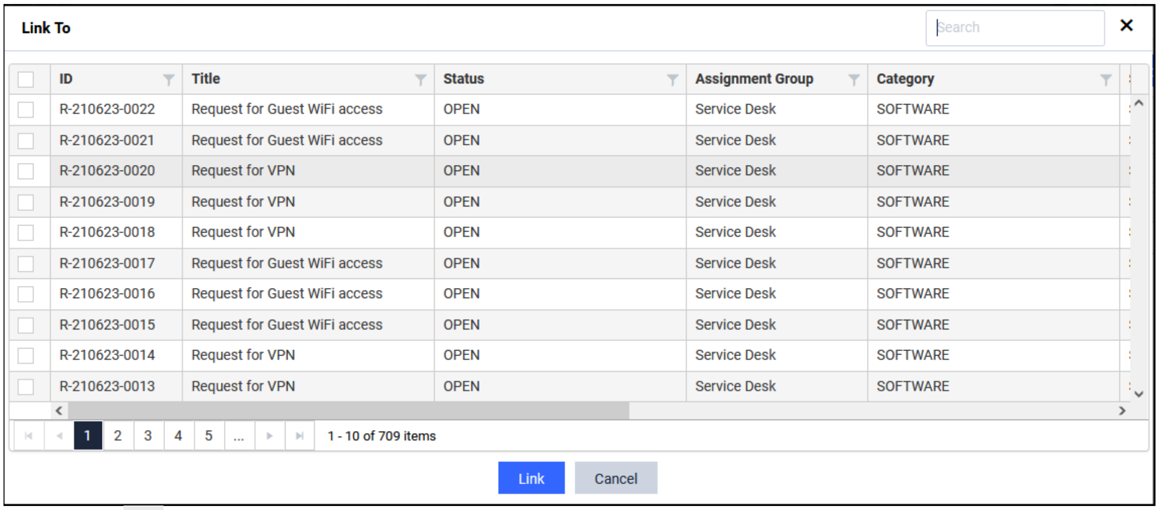


4. Click on 🔍 icon, which will display all open Incidents in a pop-up box. Agent can select incidents and attach to incident.
5. Click on Link
6. Linked ticket will be visible on Links tab.

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**'

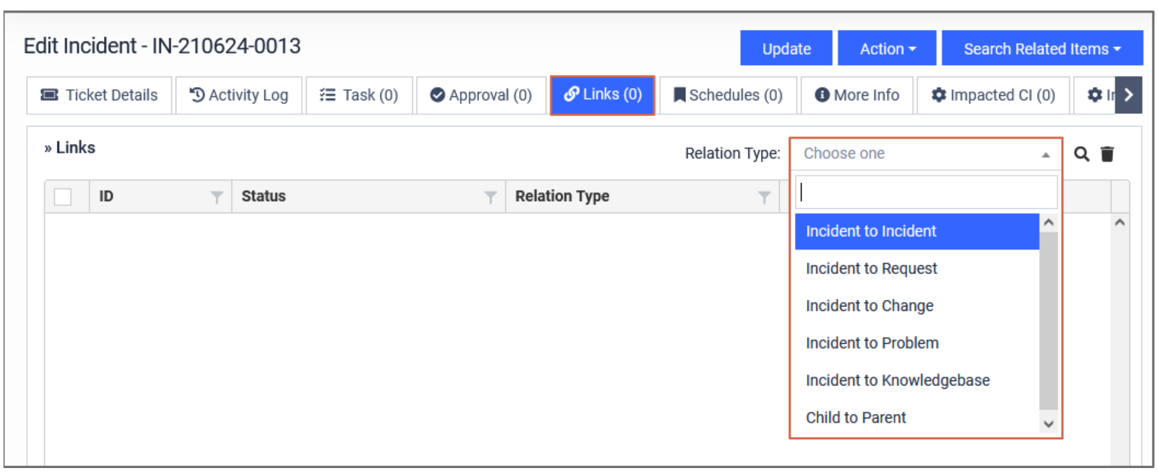


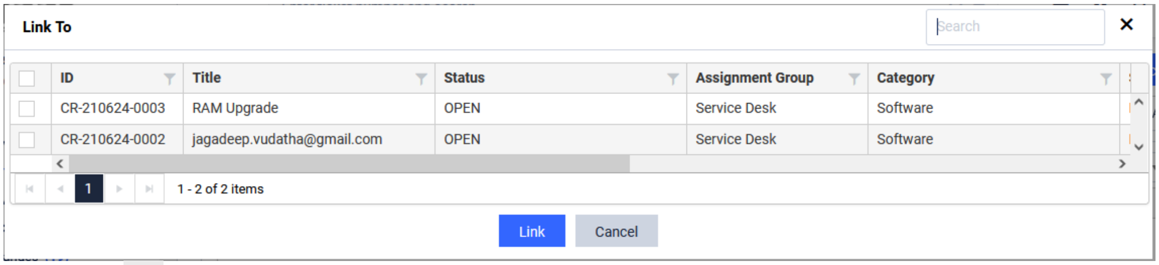


4. Click on icon, which will display all open requests in a pop-up box. Agent can select requests and attach to incident.
5. Click on Link
6. Linked ticket will be visible on Links tab.

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**'

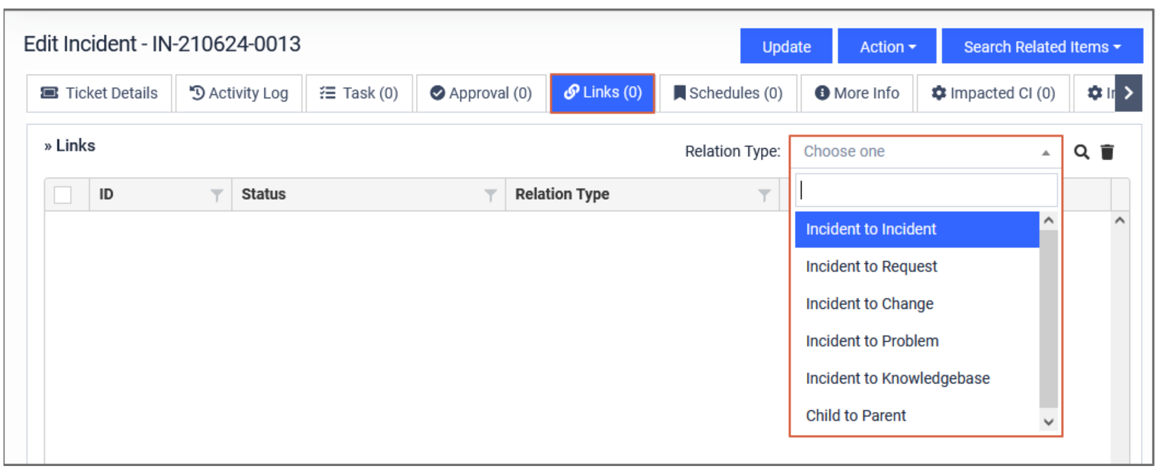


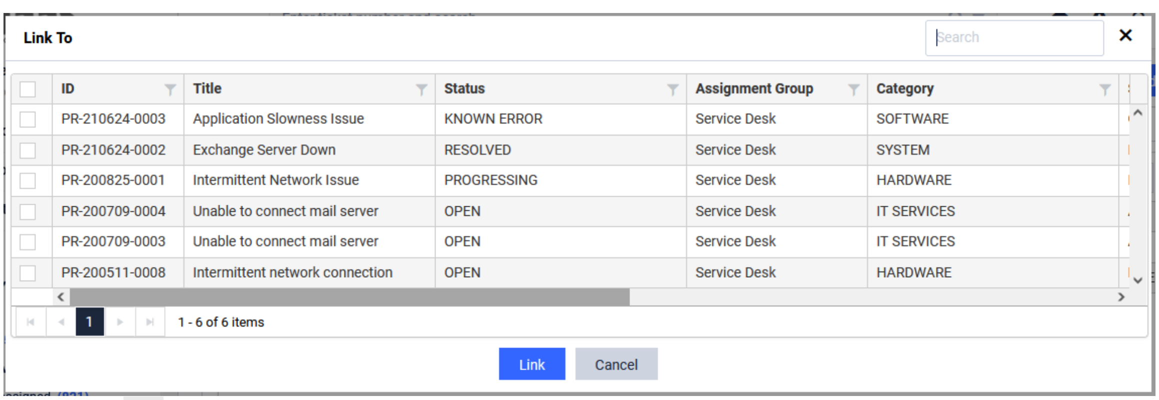


4. Click on icon, which will display all open changes in a pop-up box. Agent can select changes and attach to incident.
5. Click on Link
6. Linked ticket will be visible on Links tab.

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**'



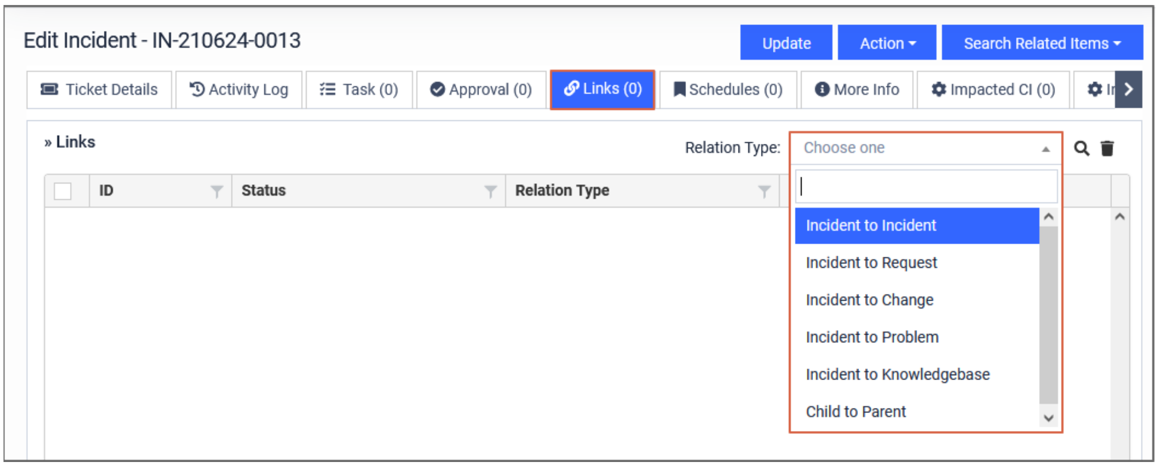


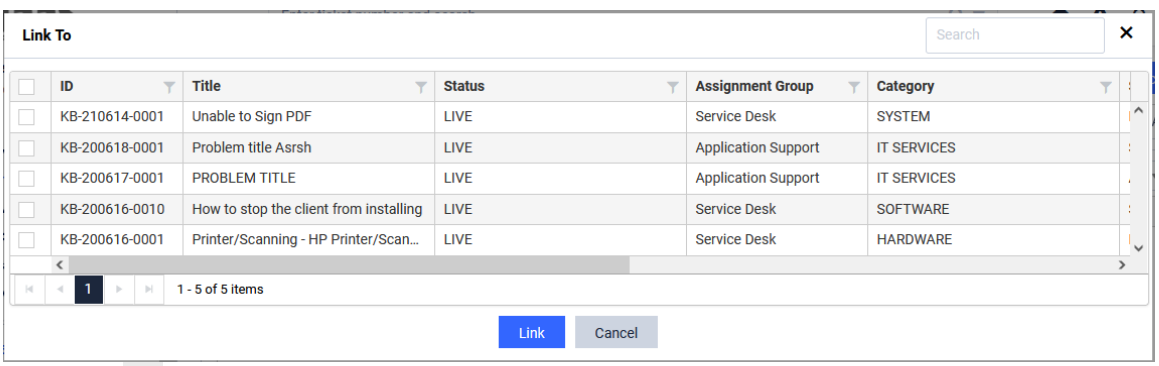
4. Click on icon, which will display all open problems in a pop-up box. Agent can select problems and attach to incident.

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**'





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.

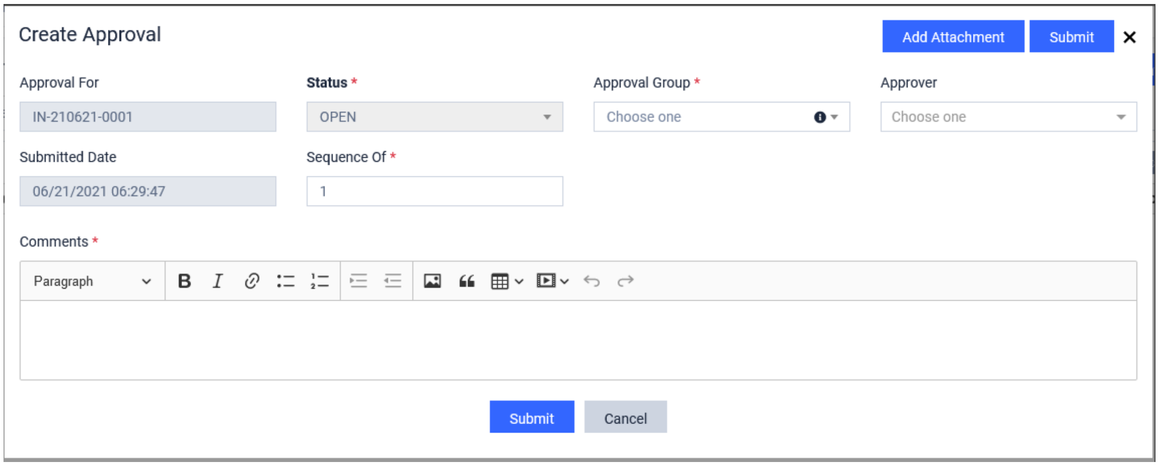
On Resolving the parent incident, automatically resolves the child incidents that are linked to it with the parent incident resolution details.

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

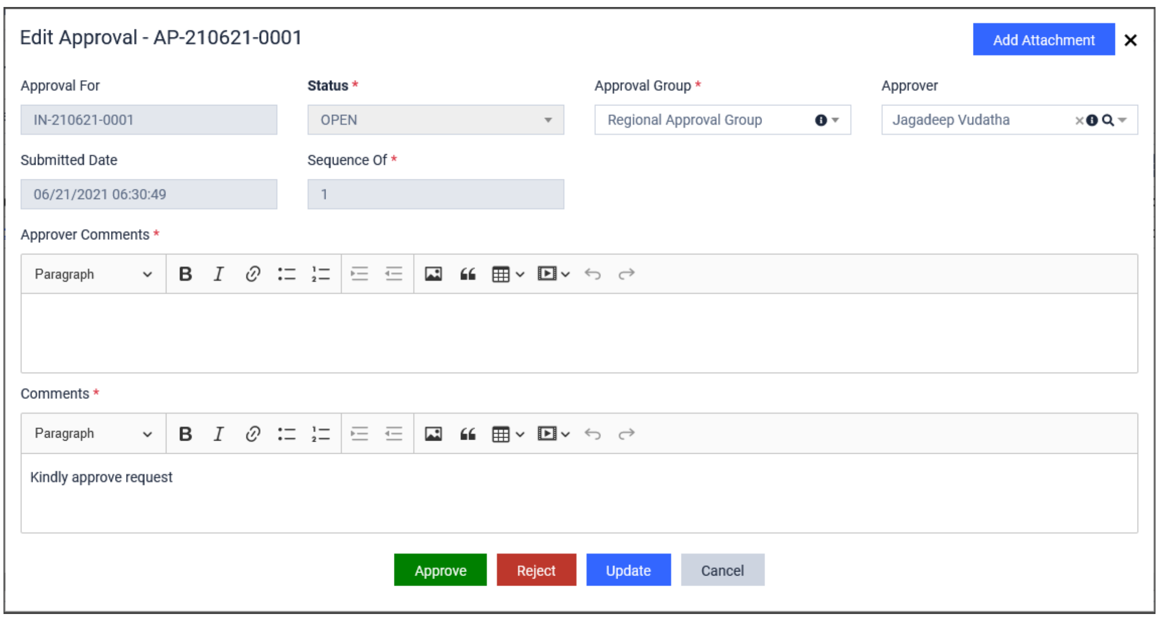
APPROVALS

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.



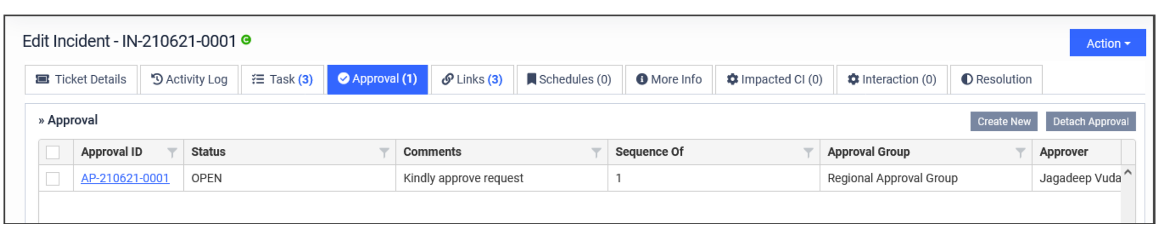
On submitting a request for approval, approver will receive an approval mail with a link to approve or reject the request.



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**.

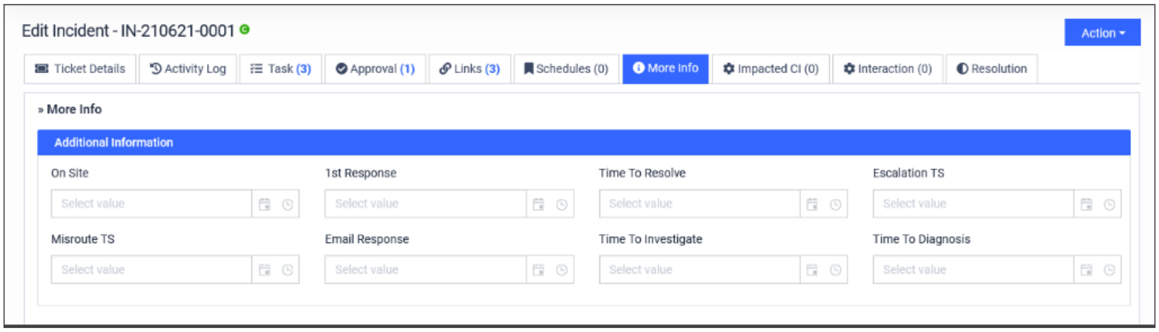
To detach any approval, click on '**Detach Approval**'.

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



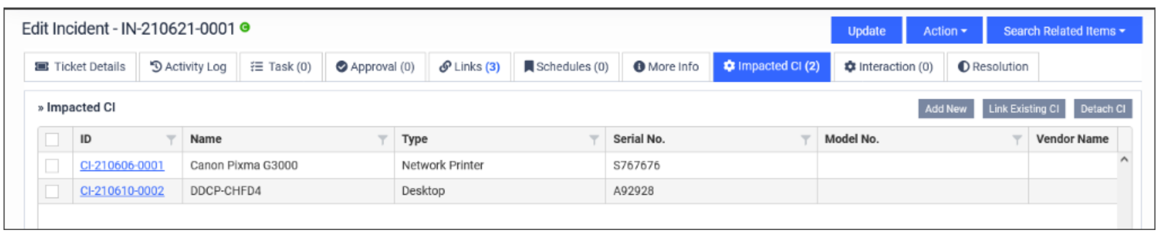
MORE INFO

Tab provides information regarding onsite visits and Escalations.

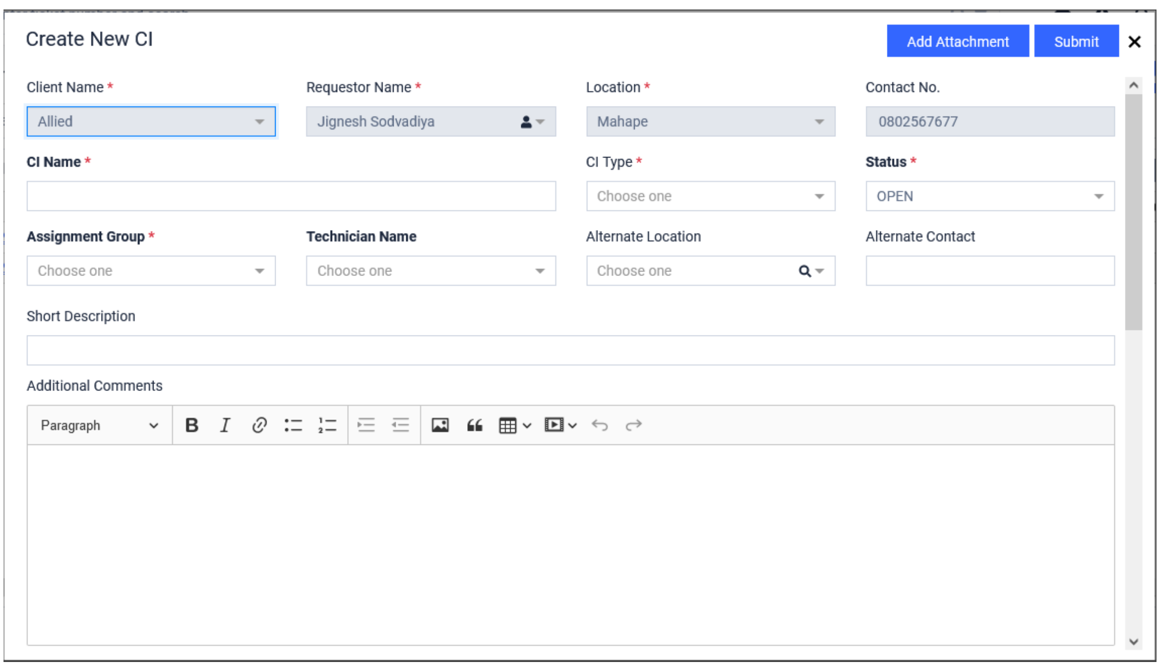


IMPACTED CI

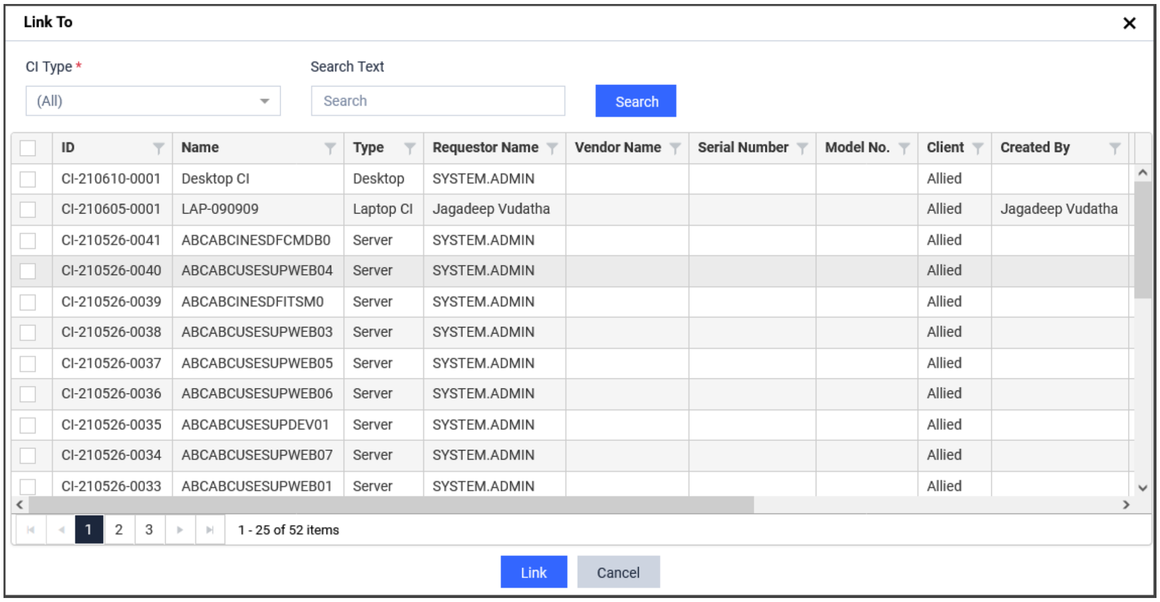
Related configuration items can be added under 'Impacted CI' tab.



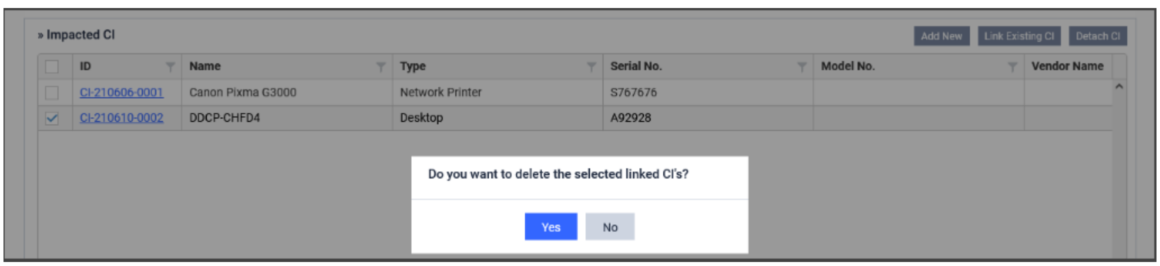
Add New- Allows to create a new CI and link to incident.



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



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



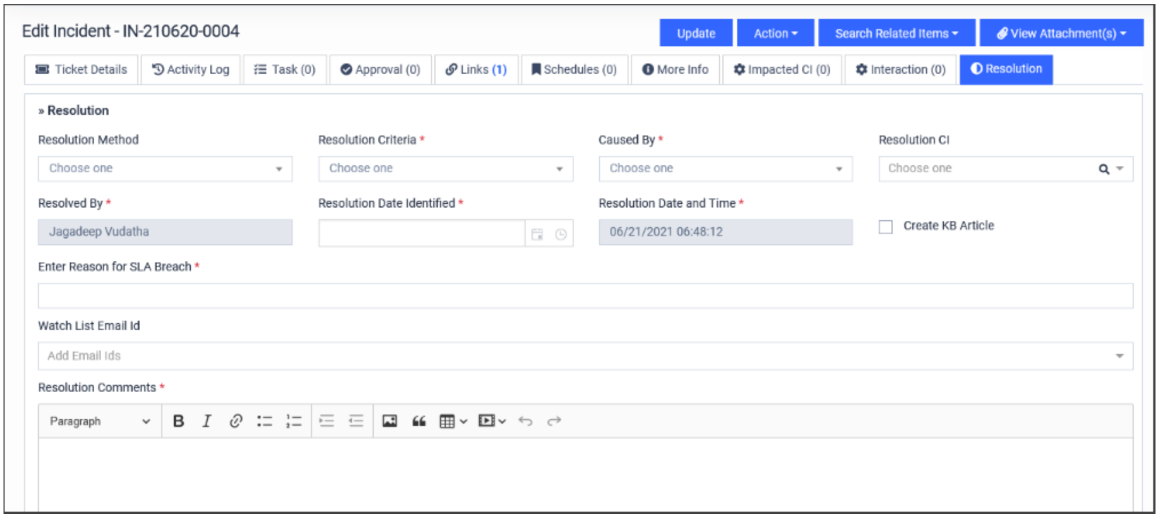
INCIDENT RESOLUTION

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.

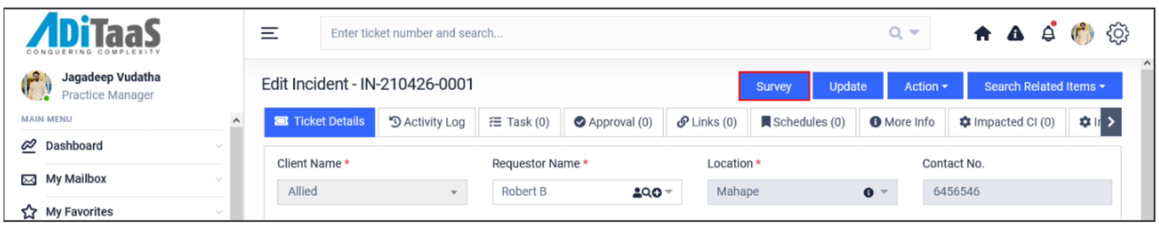
Click on Create KB checkbox if new article needs to be created based on resolved incident.

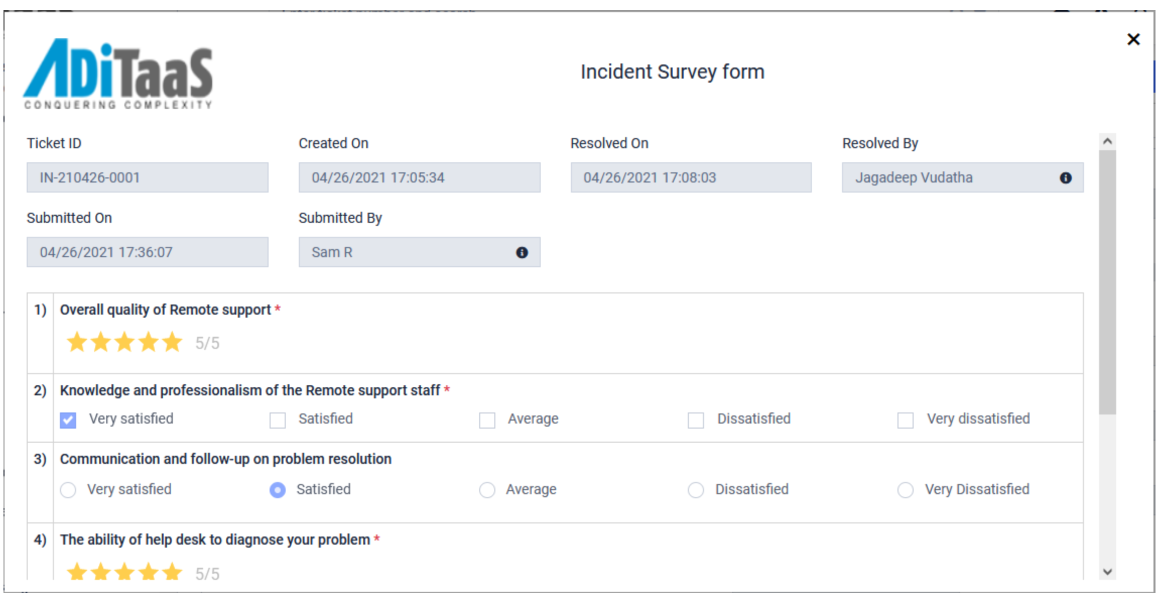
Click Update and enter resolution comments.



VIEW SUBMITTED SURVEY

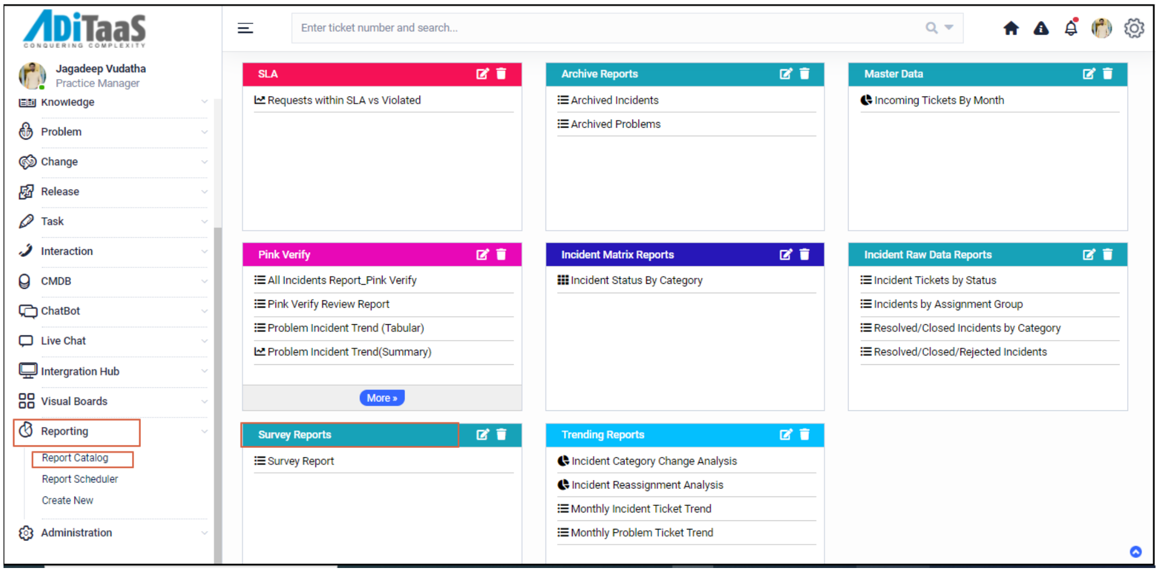
Go to respective incident record and click on survey button to view the submitted survey.

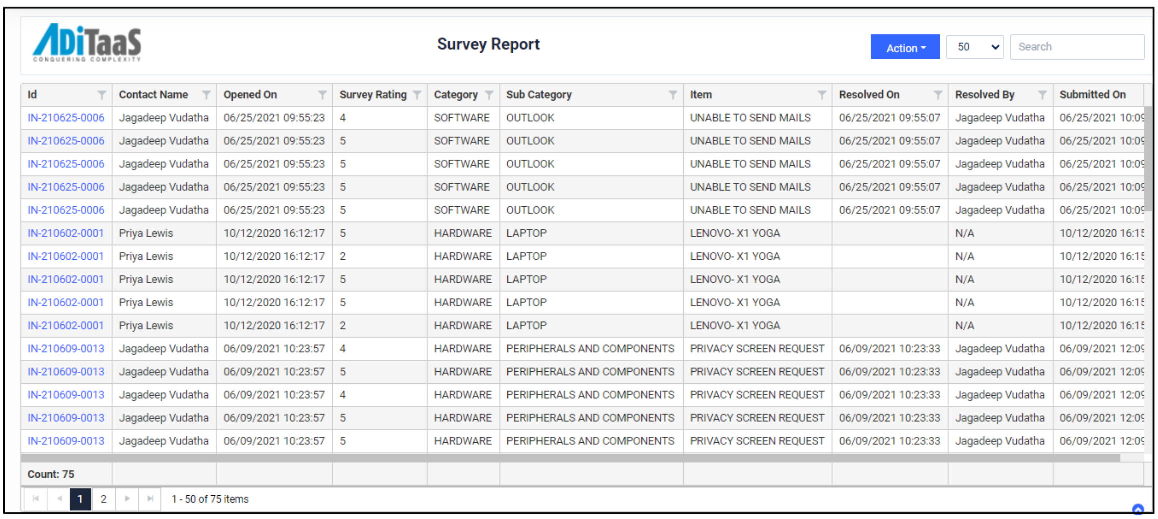




VIEW SURVEY REPORTS

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





Survey Report

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 10:0
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 10:0
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 10:0
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 10:0
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 10:0
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	5	HARDWARE	LAPTOP	LENOVO- X1 YOGA		N/A	10/12/2020 16:1
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	2	HARDWARE	LAPTOP	LENOVO- X1 YOGA		N/A	10/12/2020 16:1
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	5	HARDWARE	LAPTOP	LENOVO- X1 YOGA		N/A	10/12/2020 16:1
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	5	HARDWARE	LAPTOP	LENOVO- X1 YOGA		N/A	10/12/2020 16:1
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	2	HARDWARE	LAPTOP	LENOVO- X1 YOGA		N/A	10/12/2020 16:1
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 12:0
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 12:0
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 12:0
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 12:0
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 12:0

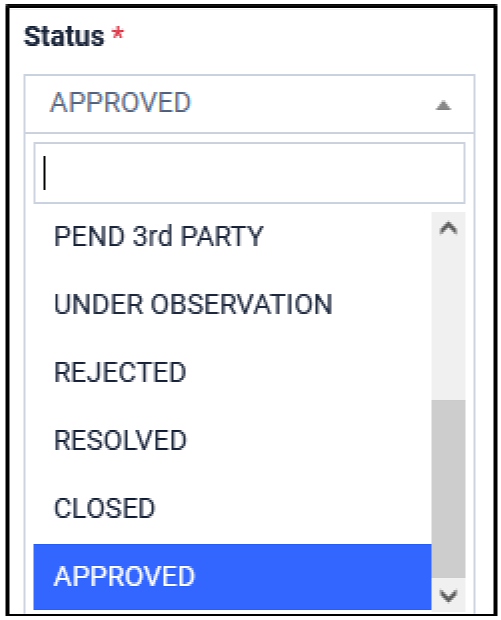
Count: 75

1 - 50 of 75 items

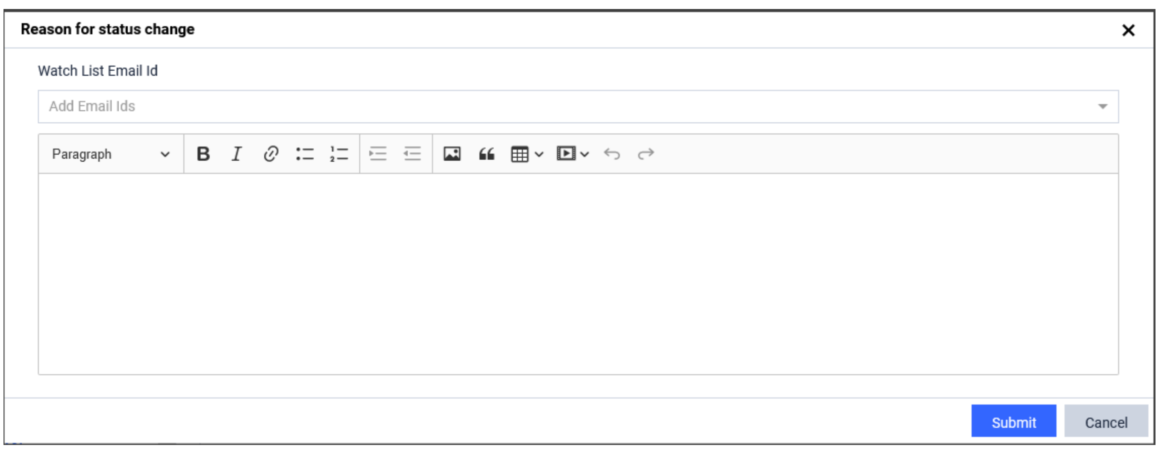
CHANGE INCIDENT STATUS

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.



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



Below are the available statuses for incident record

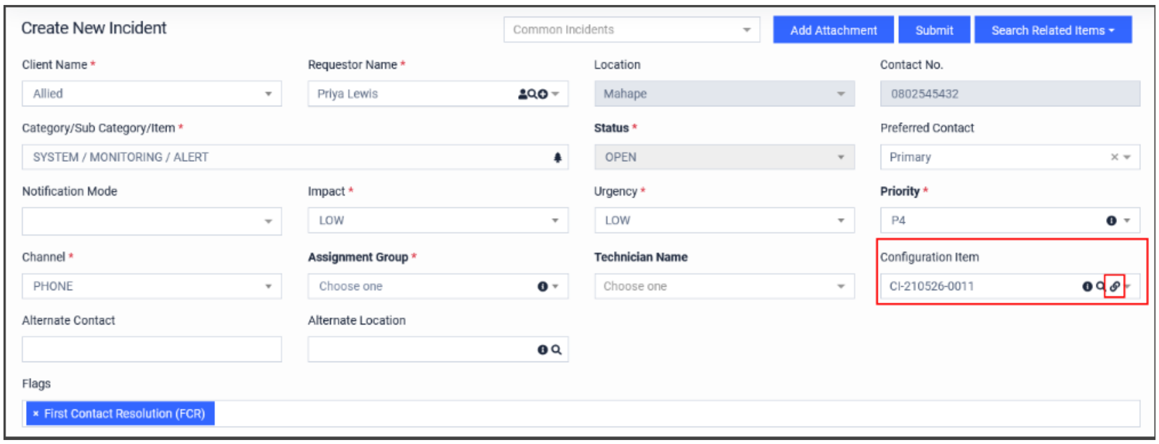
- ‘**OPEN**’: "This status is the default assignment value for all newly created incident, before they are assigned to a support group or individual for action”.
- ‘**PROGRESSING**’: "Change to this status, when you begin work on the Incident”.
- ‘**PEND 3RDPARTY**’: "Some type of action or information 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”.

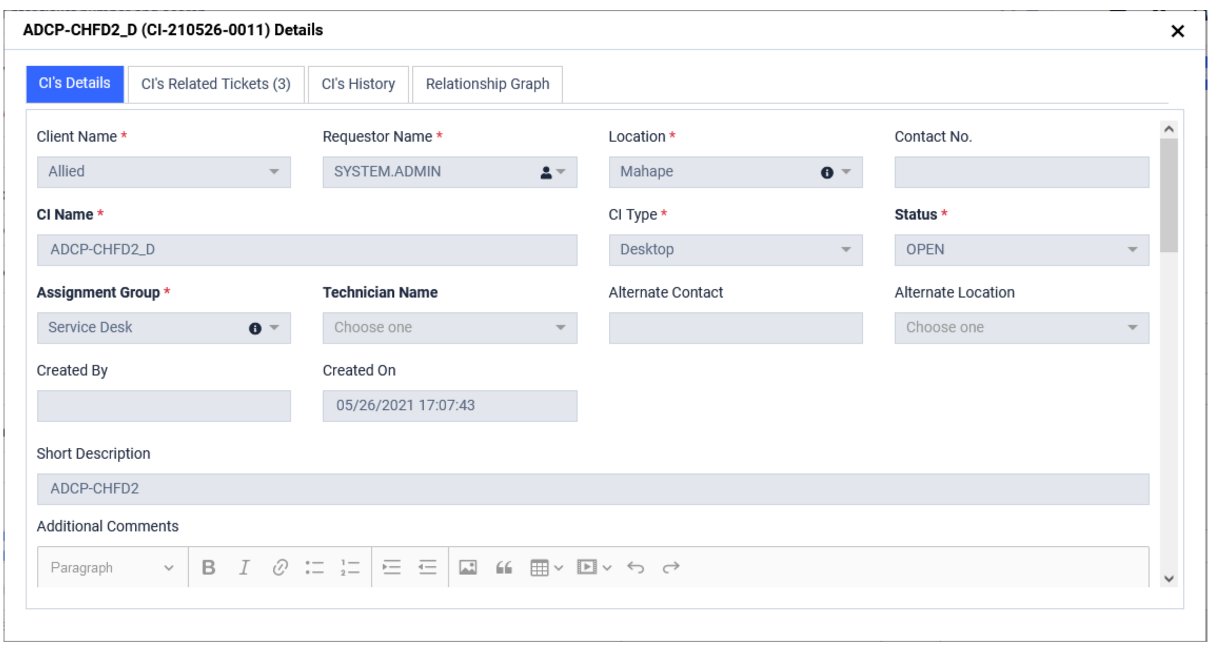
- ‘**RESOLVED**’: "Change to this status when you have to resolve the Incident”.
- ‘**CLOSED**’- Change to this status when you have to close the Incident

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
IN-210625-0001	OPEN	Priya Lewis	Network Support L2		HARDWARE	LAPTOP	LENOVO- X1 YOGA	P4
PR-210603-0001	OPEN	Jagadeep Vudatha	Service Desk		SYSTEM	MONITORING	ALERT	P4
PR-210525-0001	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

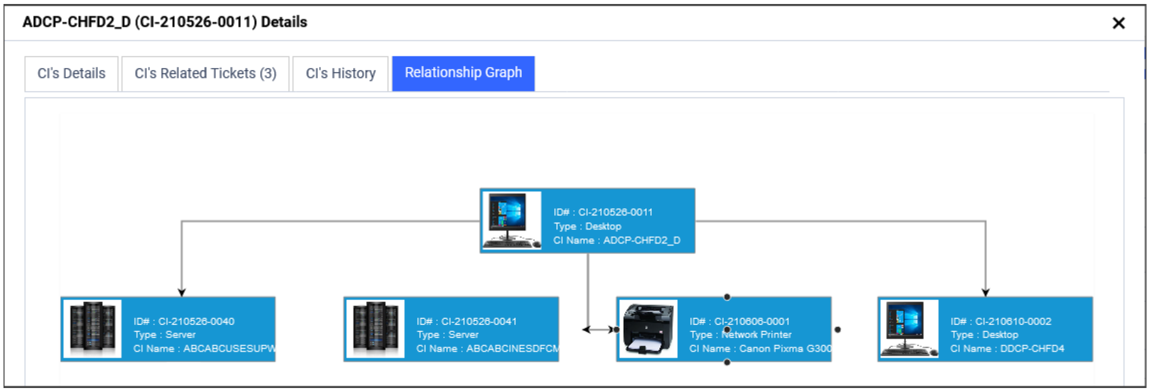
CI Name :- Desktop CI (CI-210610-0001) is attached with this CI

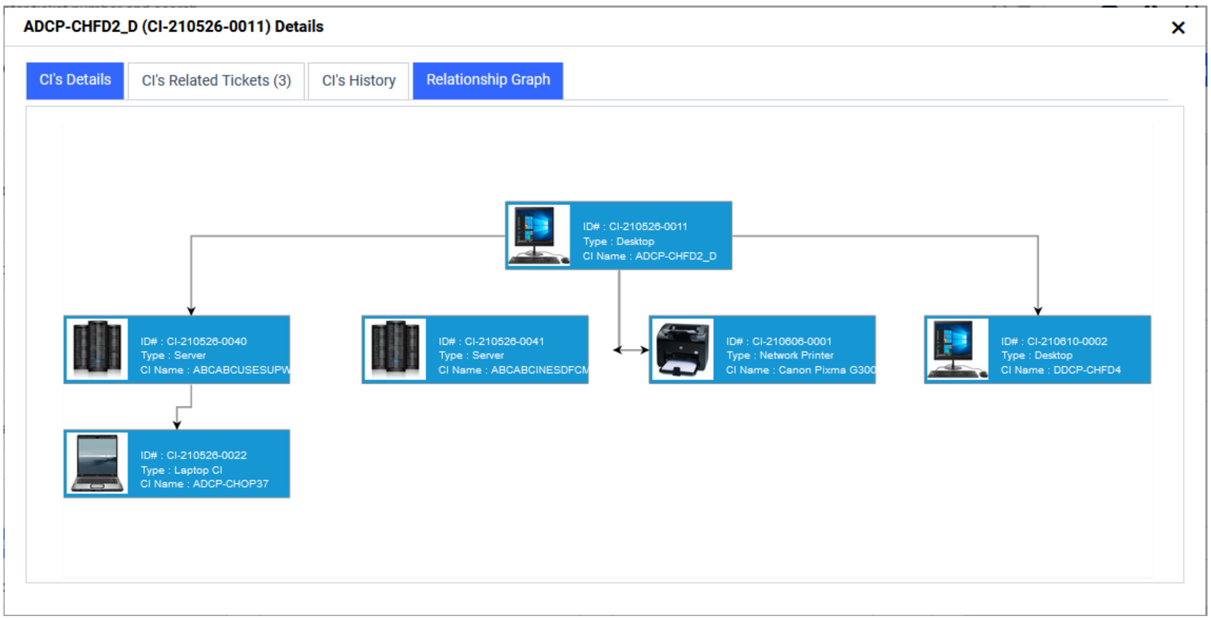
CI Attached on : 06/25/2021 06:54:19 by user = Jagadeep Vudatha

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



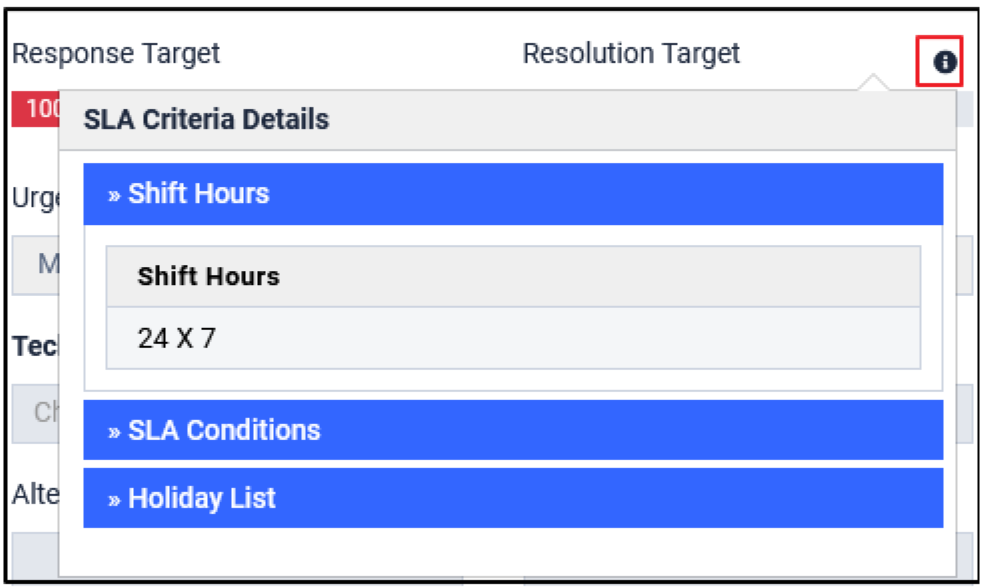


VIEW SLA INFORMATION

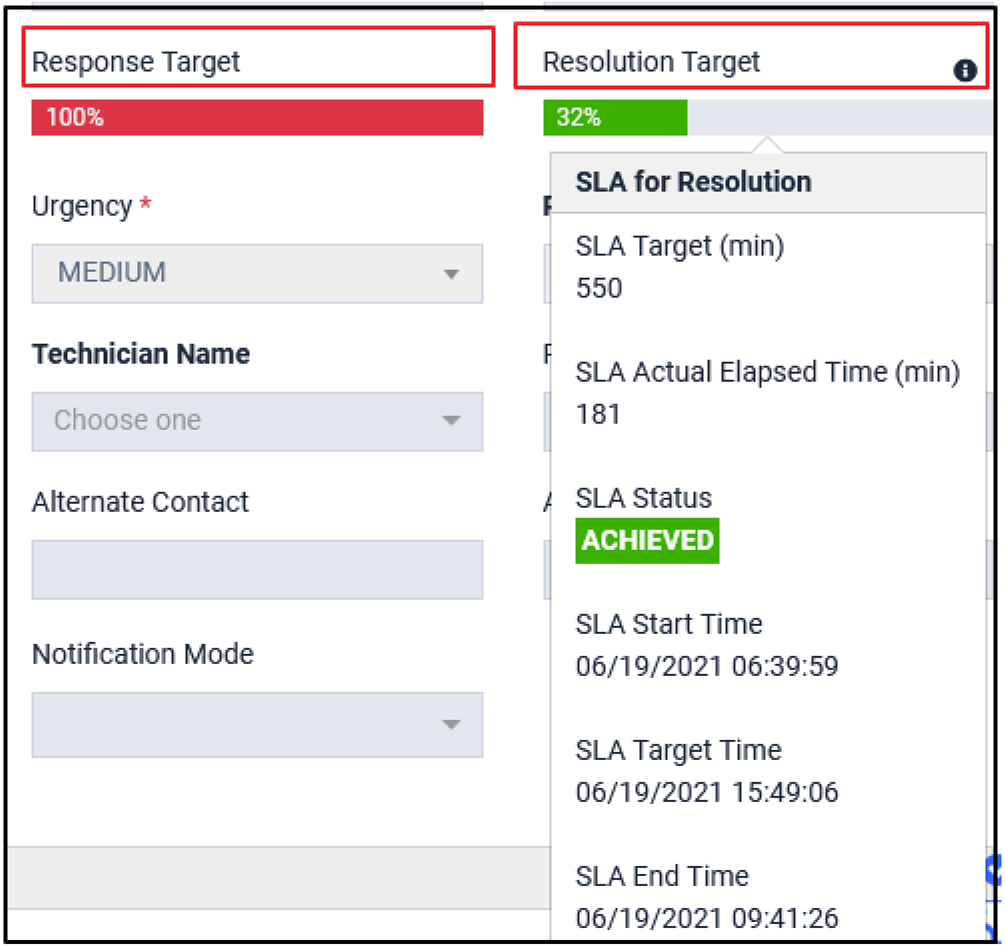
( ) icon beside the priority displays information regarding assigned Priority.

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.



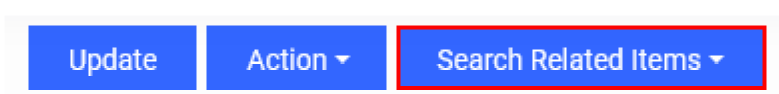
On mouse over SLA bar, SLA information displays with elapsed time and SLA status.

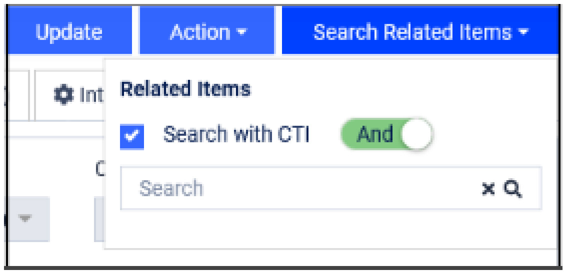


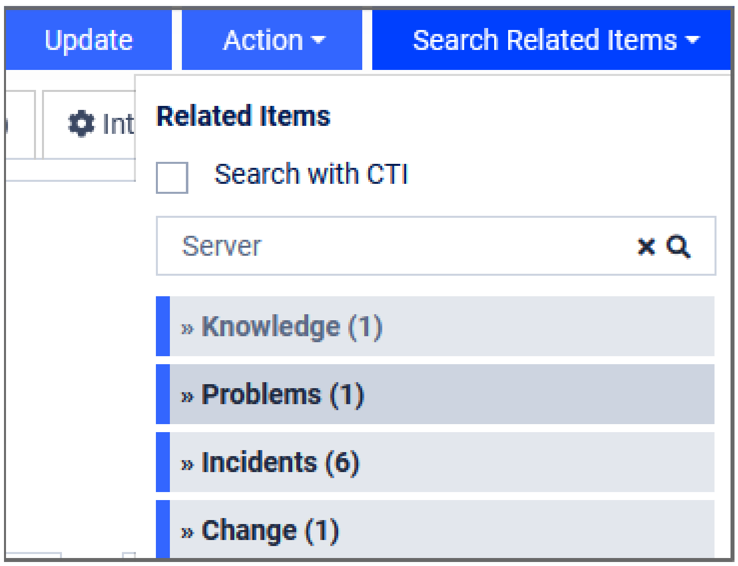
SEARCH RELATED ITEMS

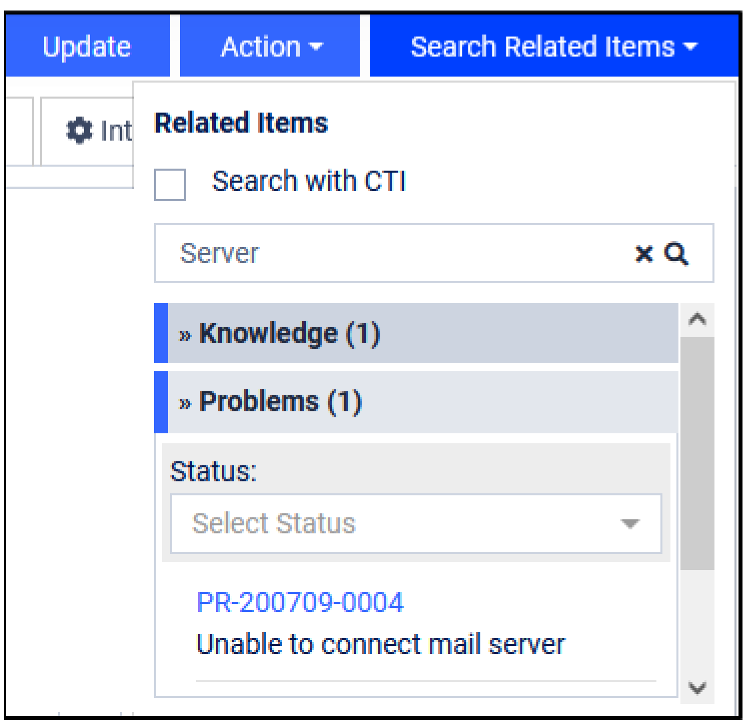
Agents can quickly search for any related tickets or knowledge article from create/ edit screen by clicking on search related items. By default search results display based on ticket title, agent has provision to search with any keyword as well as by clicking on CTI checkbox results will display matching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

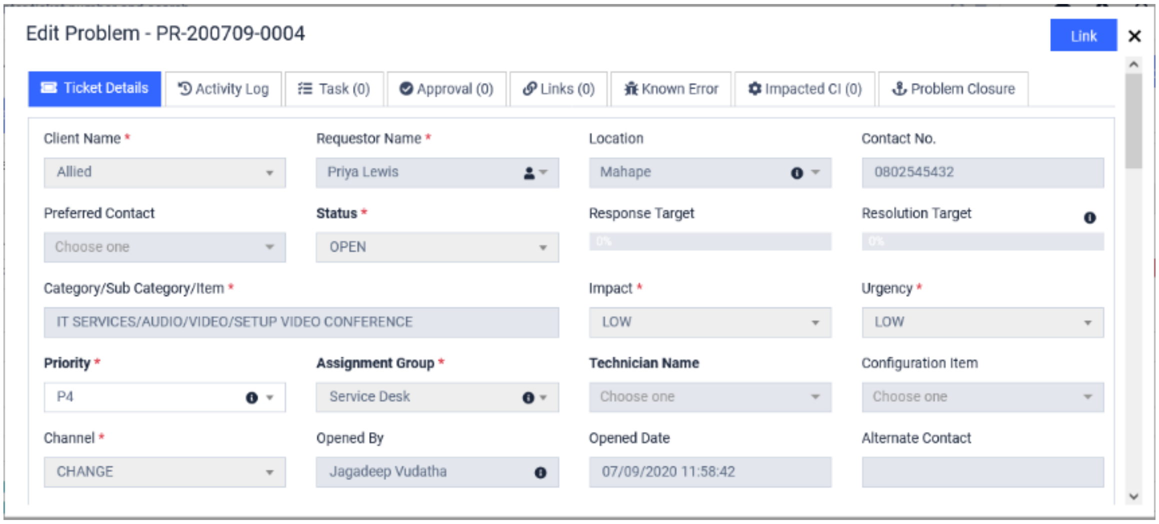
1. Click on create new or open a relevant ticket in edit mode
2. Click on **Search Related Items**
3. Type a keyword in given text field and click on search icon
4. Displays a results according to the keyword
5. Click on required ticket / knowledge article
6. On clicking ticket or article will be open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




Update
Action
Search Related Items
Related Items
Search with CTI
And
Search

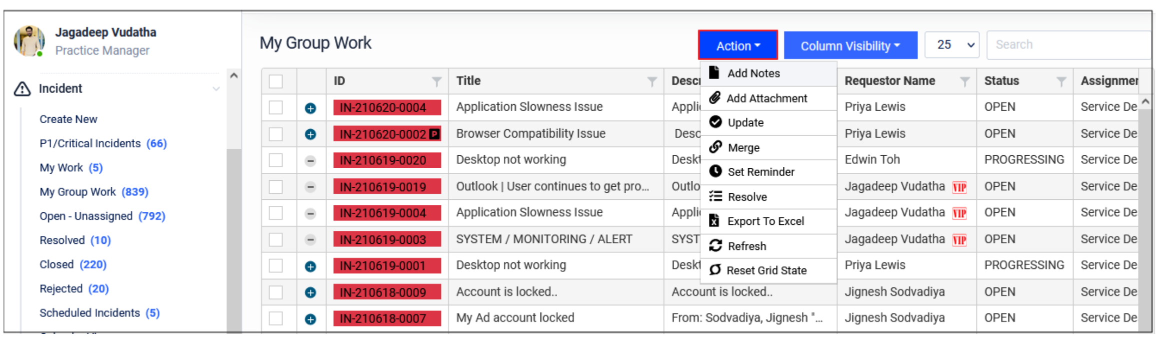

Update
Action
Search Related Items
Related Items
Search with CTI
Server
» Knowledge (1)
» Problems (1)
» Incidents (6)
» Change (1)


Update
Action
Search Related Items
Related Items
Search with CTI
Server
» Knowledge (1)
» Problems (1)
Status:
Select Status
PR-200709-0004
Unable to connect mail server



Data grid Actions

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



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

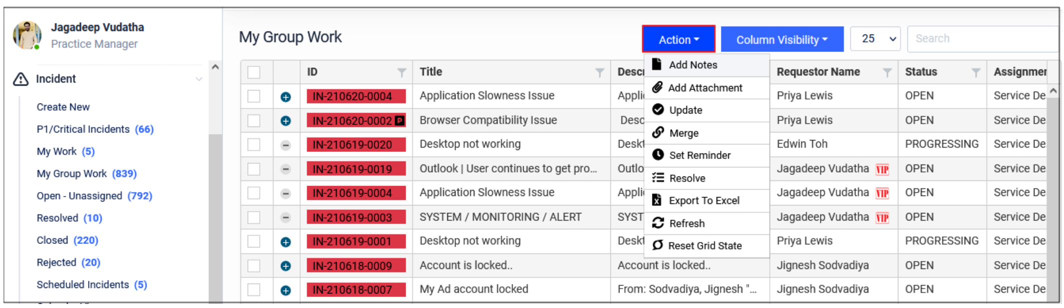
Action in tab in data grids provides a feature to add reminders on multiple tickets at a time.

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.

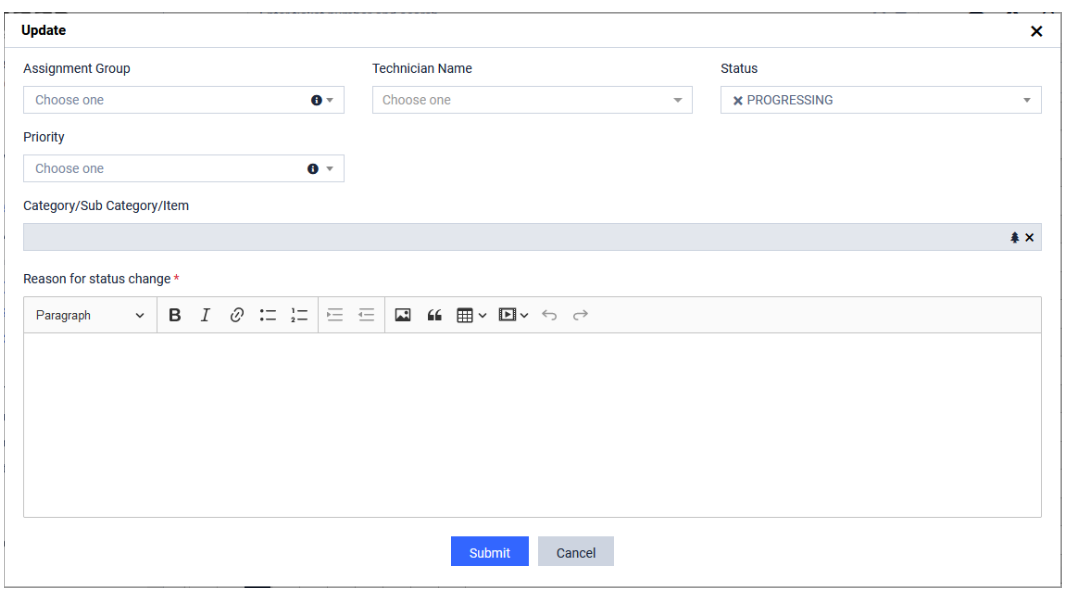
BULK UPDATE / ASSIGNMENT

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



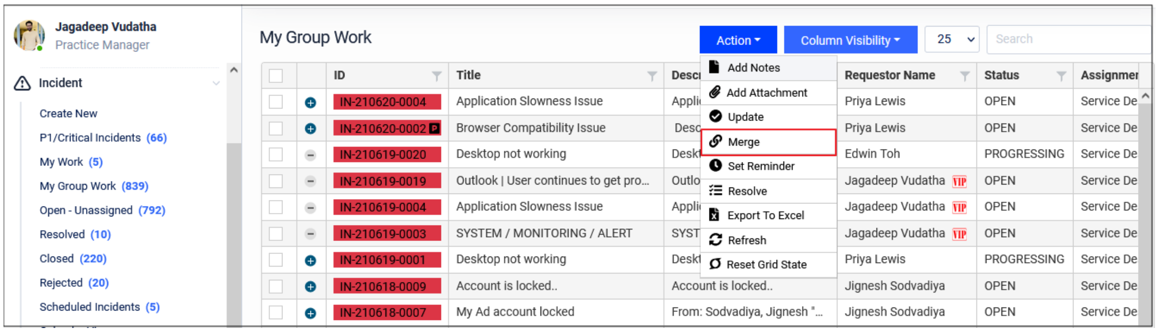
1. Select tickets from same module by clicking on checkbox placed beside the ticket id
2. Click on **Action** button
3. Select '**Update**' action item, modify status, priority, category or assignment details.
4. Click on submit

All selected tickets will updated with added contents.



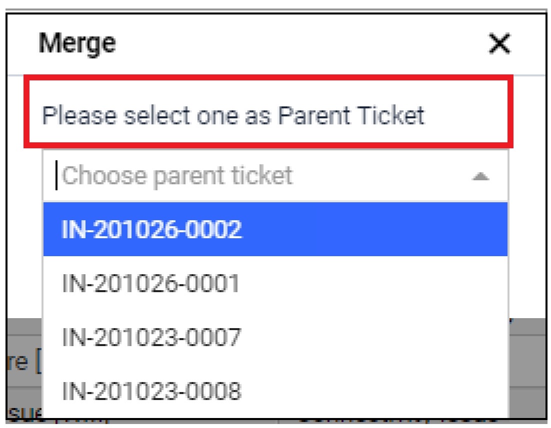
MERGE TICKETS

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.



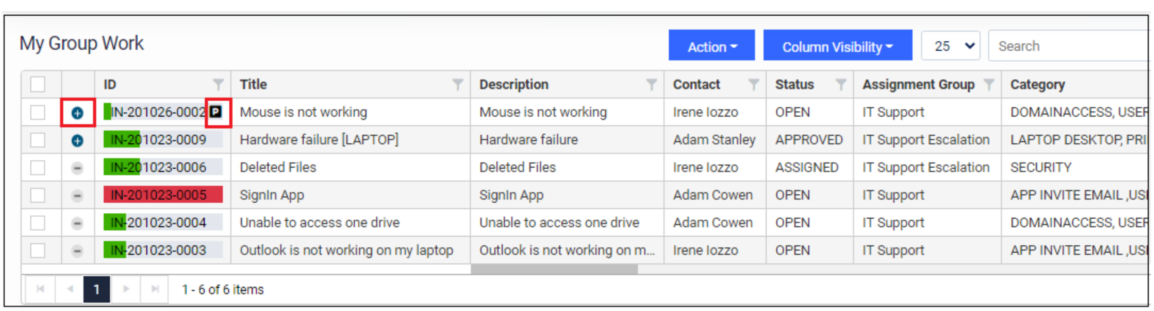
To merge requests,

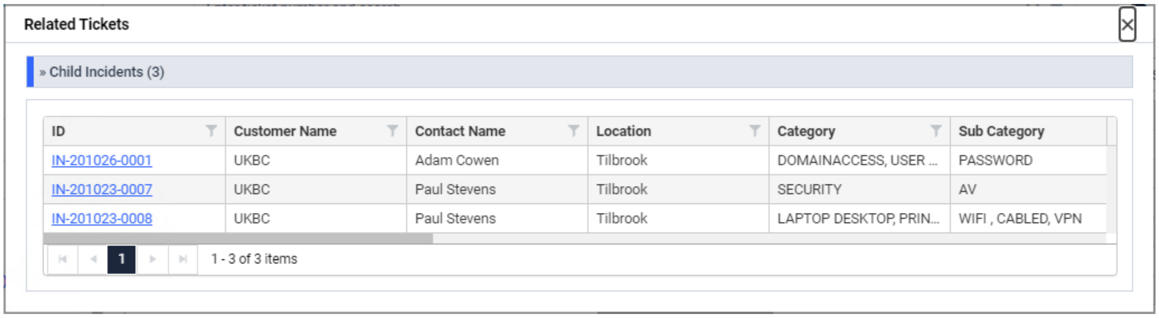
1. Click on the Incident Module in the left panel and select My Group/ Work data grids.
2. Select the list of incidents to be merged by selecting the check box.
3. Click the Action drop down menu -> select **Merge** option. A confirmation dialog appears.
4. Select one ticket as Parent ticket
5. Click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



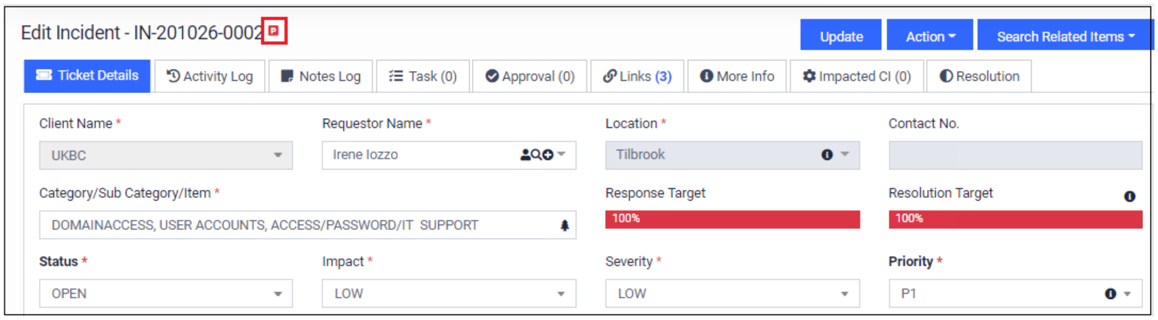
All linked tickets disappeared from data grid and visible under Parent ticket.

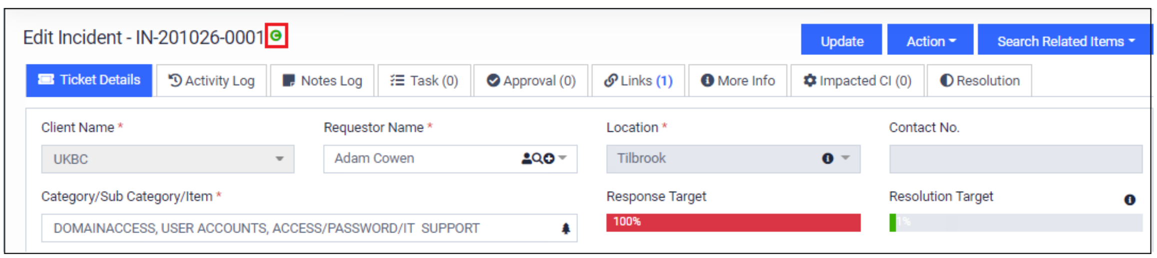
Click on blinking '+' icon on Parent ticket to view all child Incidents.





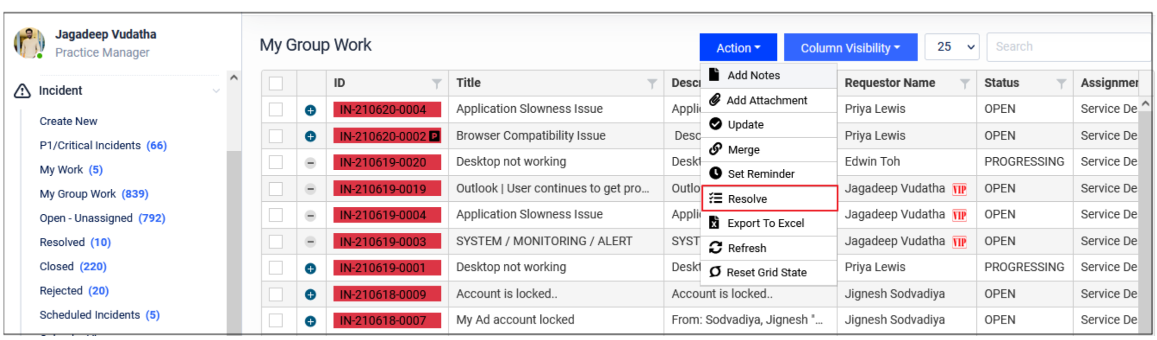
P and **C** icons stands for '**Parent**' and '**Child**' tickets respectively.



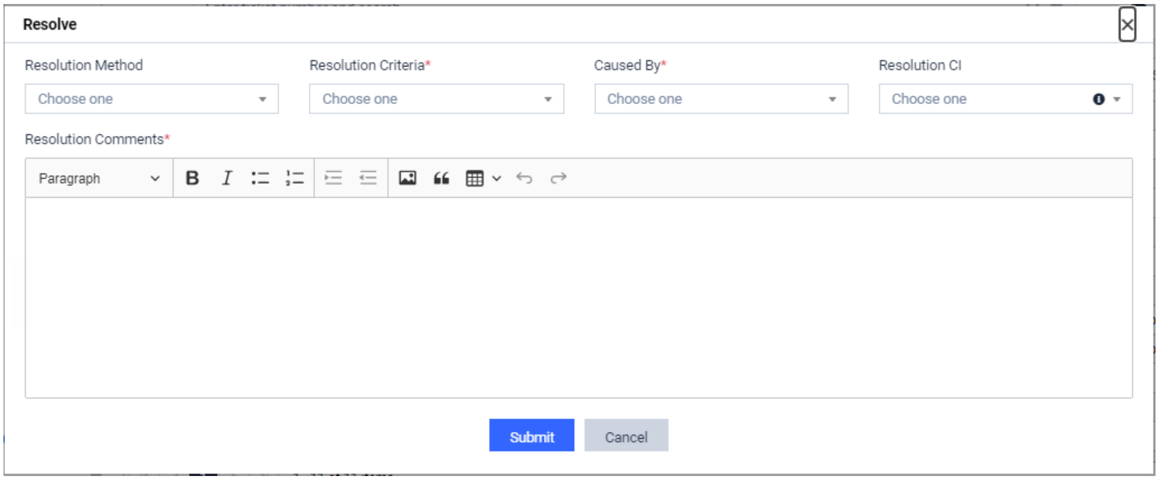


BULK RESOLVE/CLOSE

Data grid provides facility to resolve multiple tickets at once.



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**

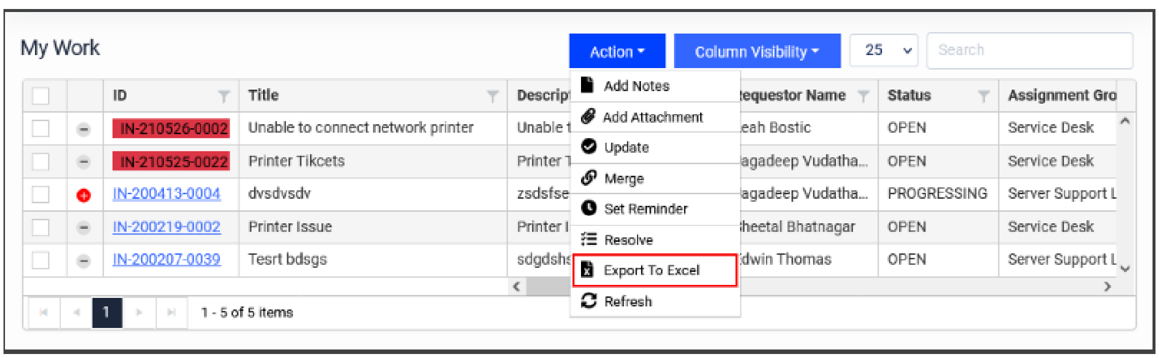


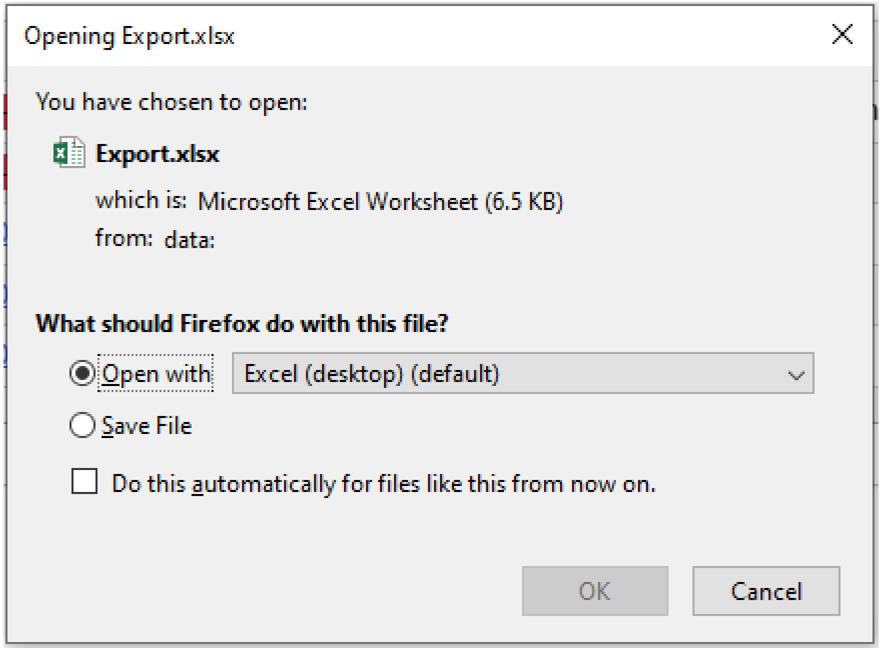
All selected ticket will be resolved with entered resolution details.

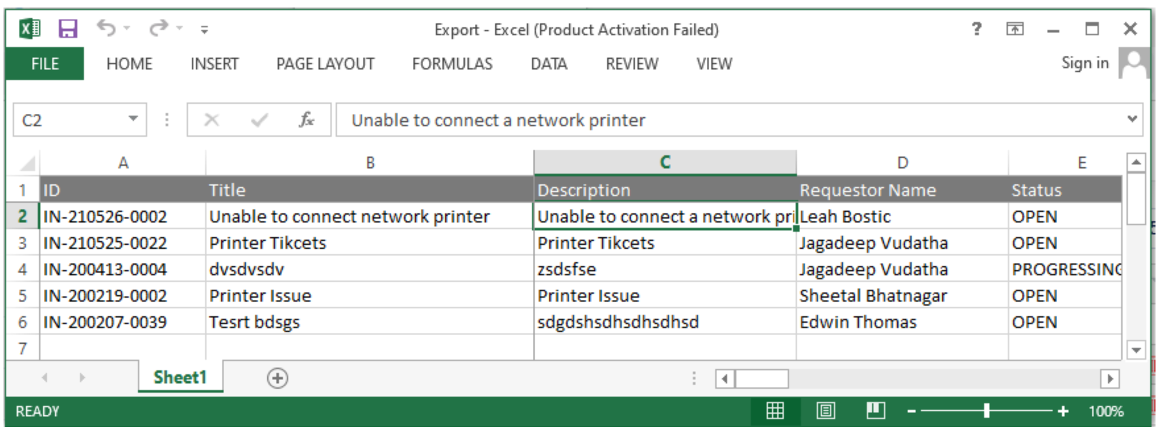
Note: If there are any open approval/ tasks tickets associated with the ticket, the application will throw a message.

EXPORT TO EXCEL

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

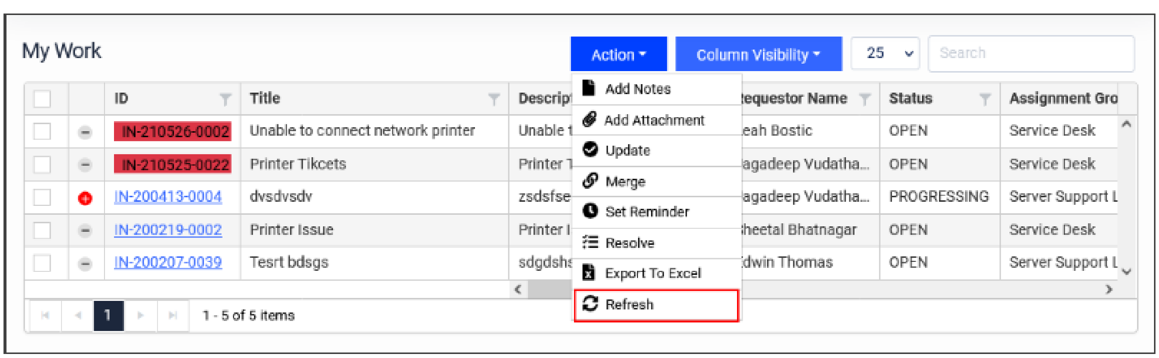






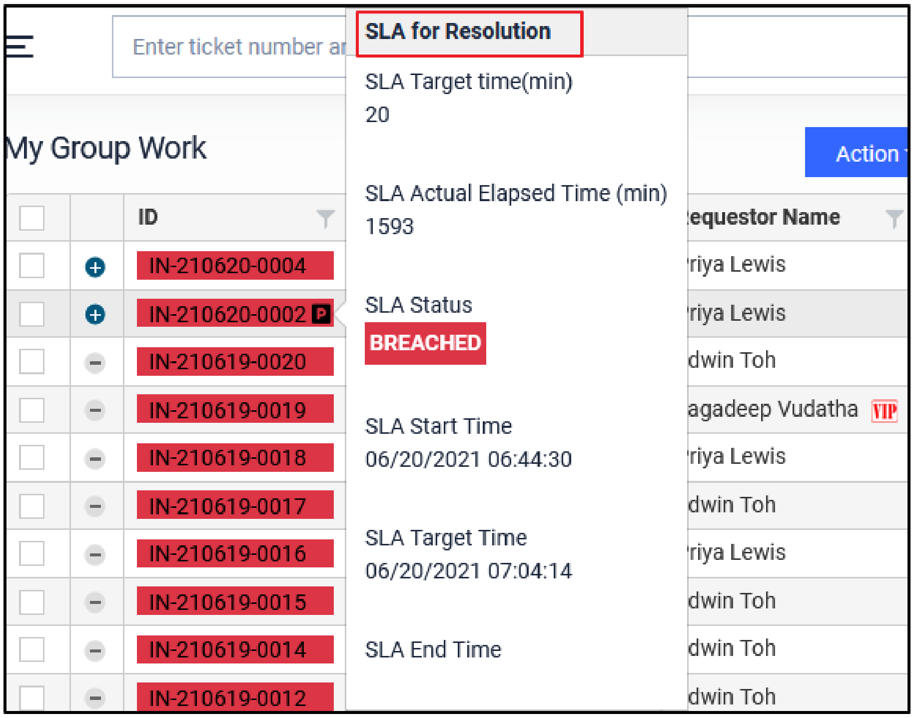
REFRESH

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



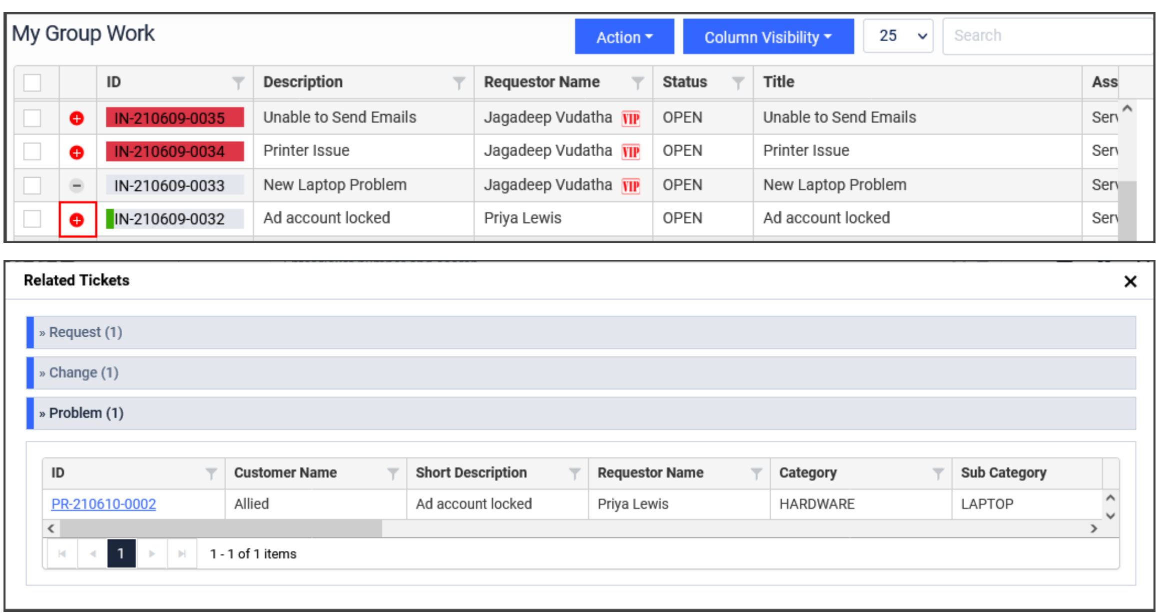
VIEW SLA INFORMATION FROM DATA GRID

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



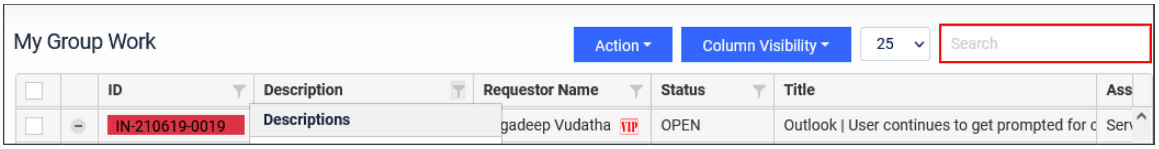
VIEW LINKED TICKETS FROM DATA GRID

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.



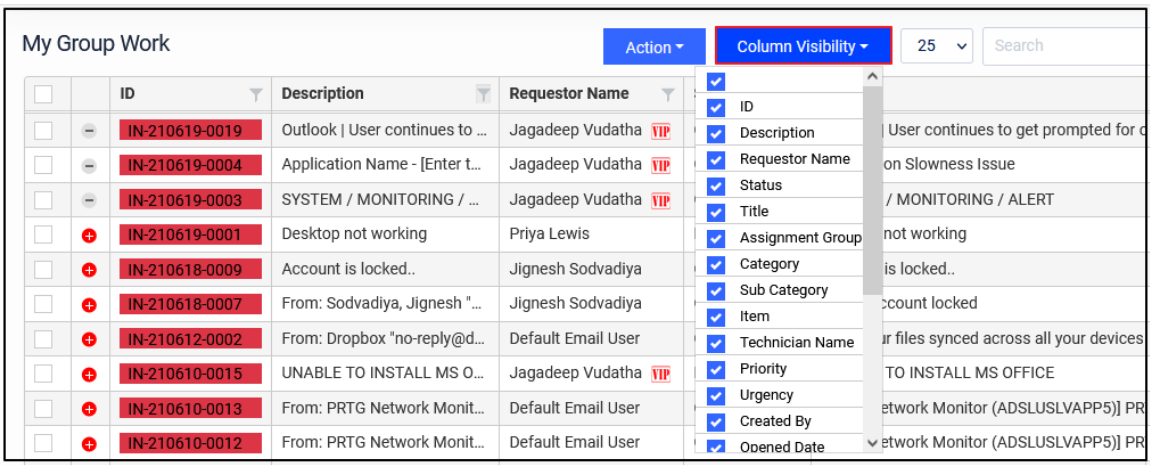
WILD CARD SEARCH ON DATA GRIDS

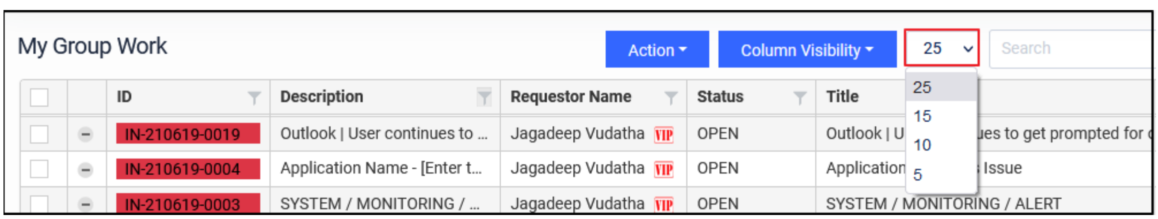
Free text box with search water mark at the top right side allows agent to search for any tickets with the keywords.



COLUMN VISIBILITY

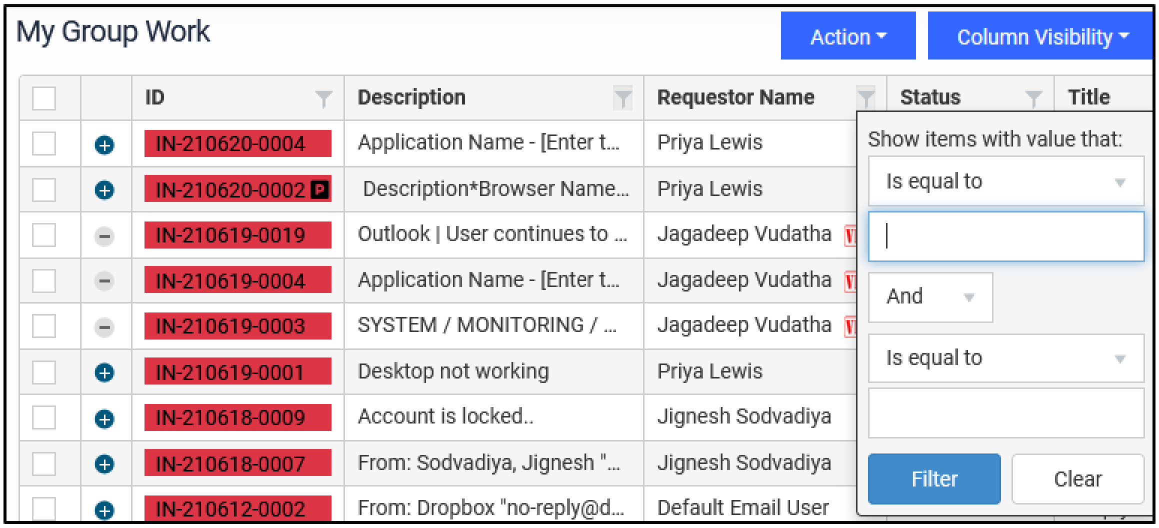
Column visibility allows agent to select required columns to be visible in data grid. Number dropdown allows to select number of tickets to display in data grid.

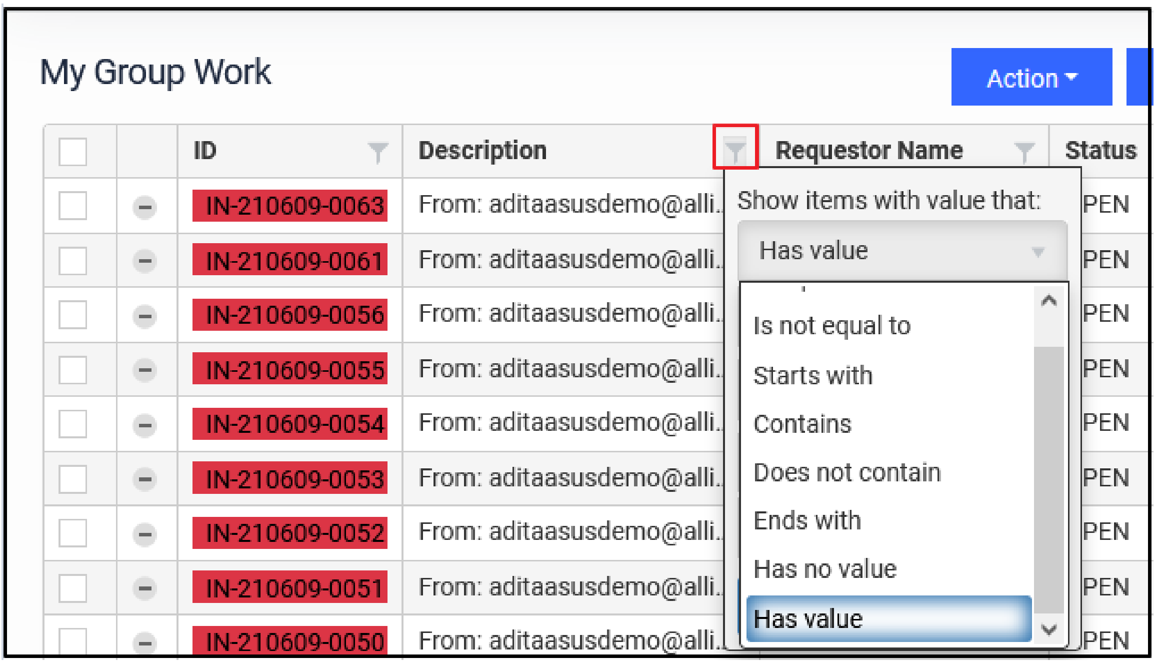




FITERING THE DATA/ COLUMNS

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

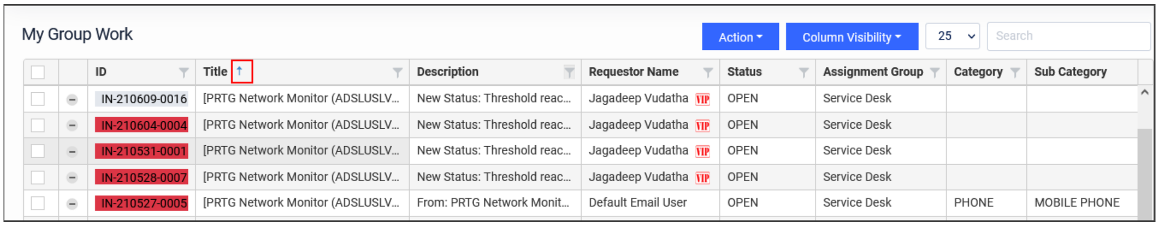




SORTING THE DATA/ COLUMNS

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.

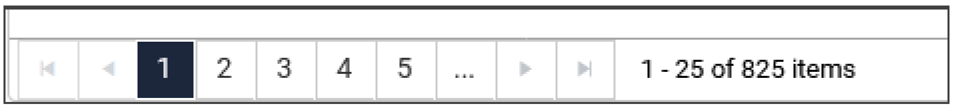

My Group Work

Action | Column Visibility | 25 | Search

		ID	Title	Description	Requestor Name	Status	Assignment Group	Category	Sub Category
		IN-210609-0016	[PRTG Network Monitor (ADSLUSLV...	New Status: Threshold reac...	Jagadeep Vudatha VIP	OPEN	Service Desk		
		IN-210604-0004	[PRTG Network Monitor (ADSLUSLV...	New Status: Threshold reac...	Jagadeep Vudatha VIP	OPEN	Service Desk		
		IN-210531-0001	[PRTG Network Monitor (ADSLUSLV...	New Status: Threshold reac...	Jagadeep Vudatha VIP	OPEN	Service Desk		
		IN-210528-0007	[PRTG Network Monitor (ADSLUSLV...	New Status: Threshold reac...	Jagadeep Vudatha VIP	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.



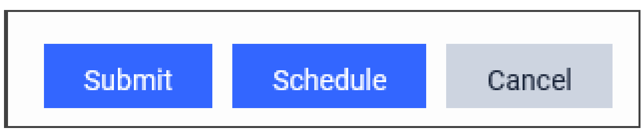
Click on arrows to displays the first page, previous page, displays the next page and final page of the results

You can also click on specific page you want to display.

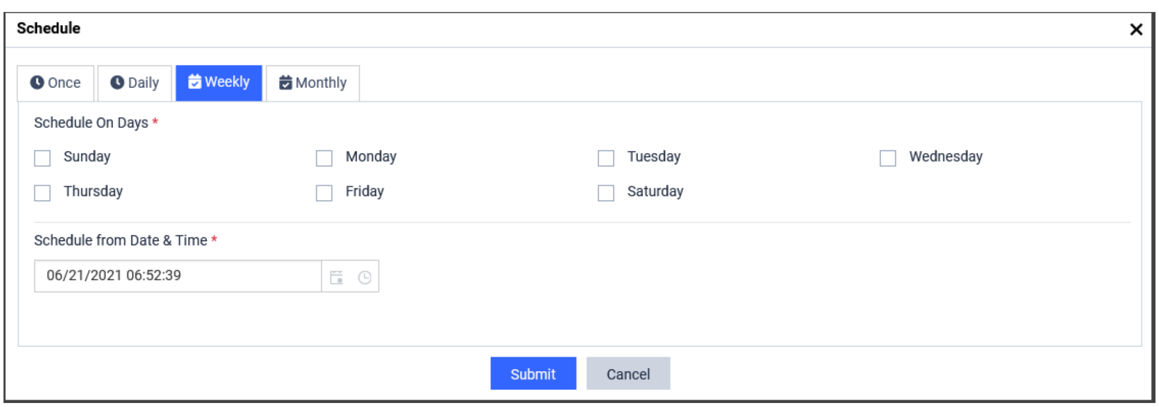
SCHEDULED INCIDENTS

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.

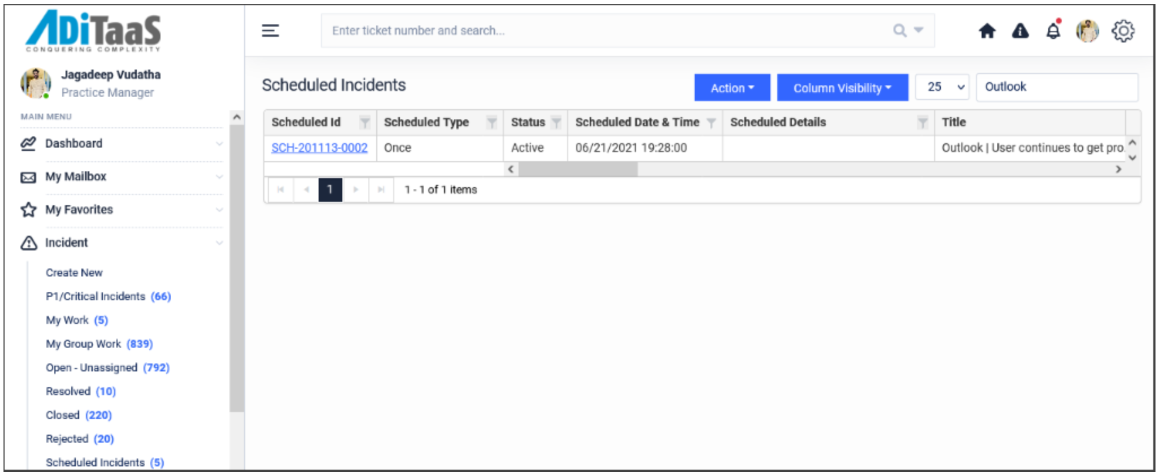


3. Displays scheduled dialog box, Select Scheduler Type, Schedule from Date & Time
4. Click on **Submit**



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**



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 performed 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.

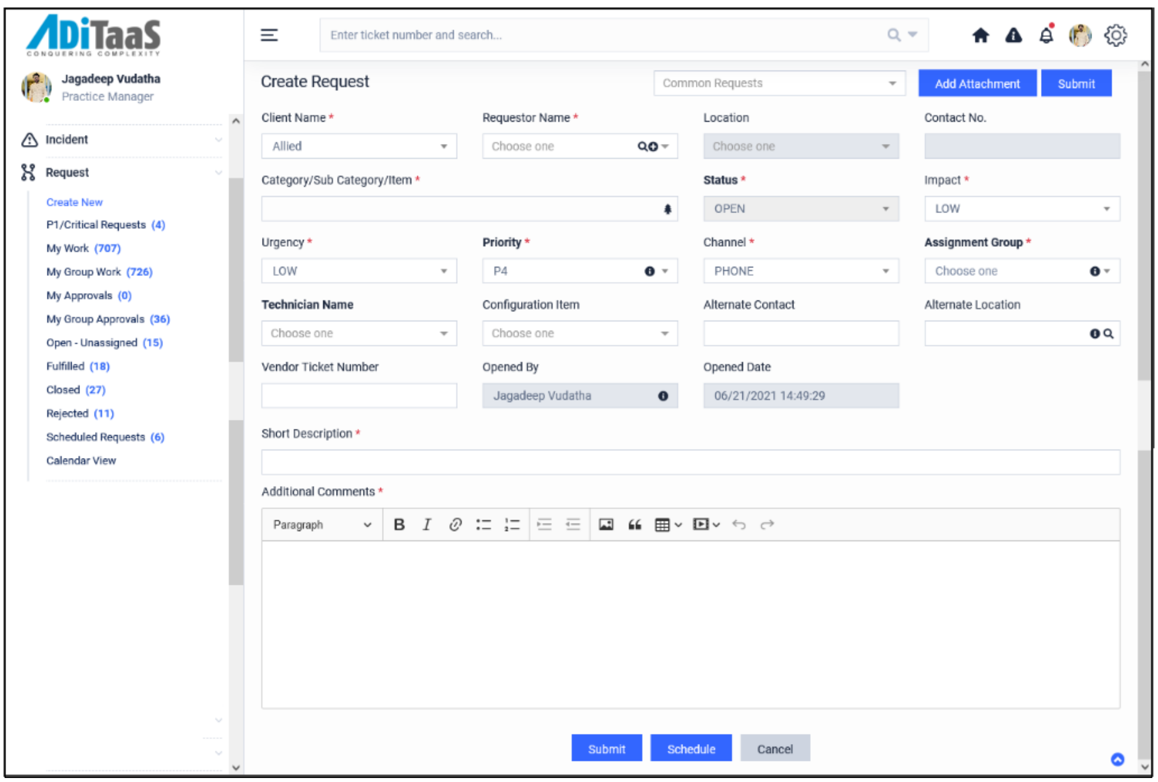
p. **Vendor Ticket Number-** Optional field.

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.

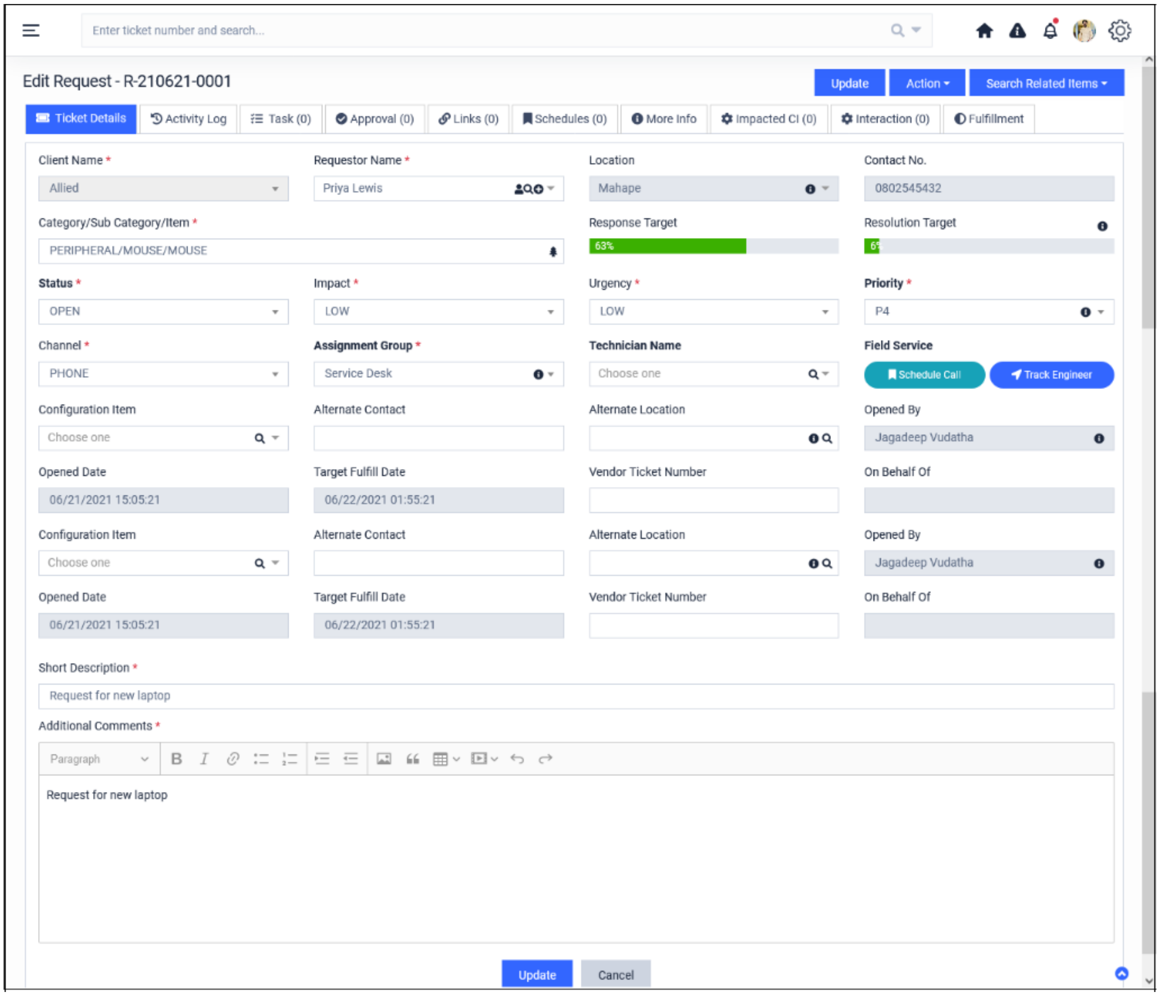
t. **Additional Comments:** Provide a detailed description with any other associated details relevant to the service request.



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.

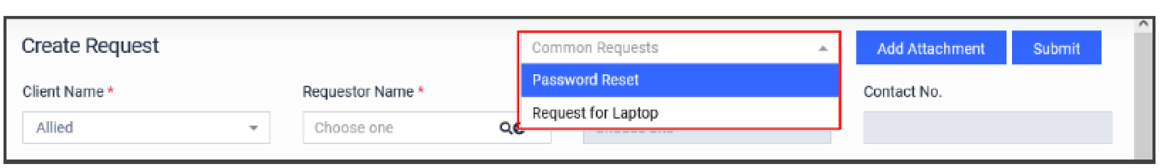
w. New service request will be created with **unique Request ID** and an email notification is sent to confirm that the ticket has been raised.



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**

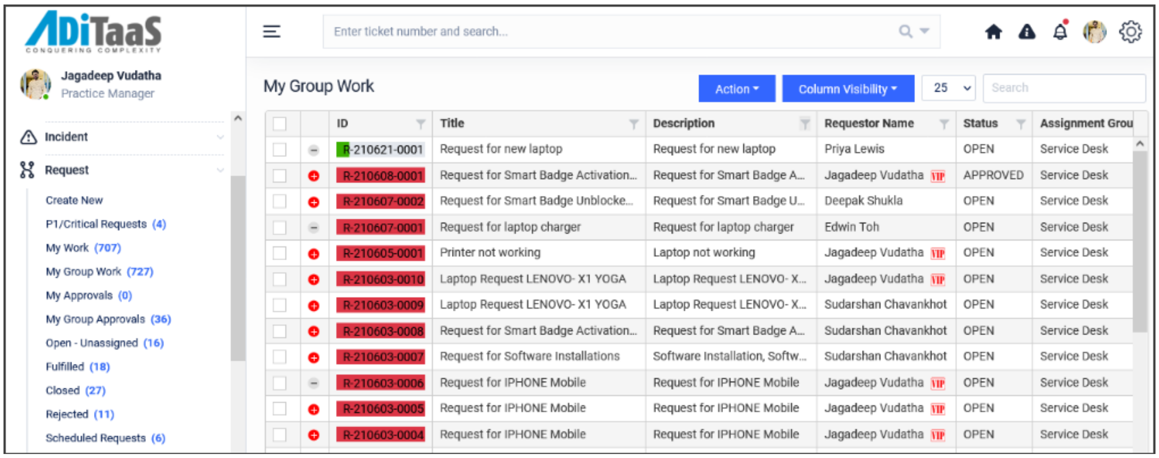


REQUEST DATA GRIDS

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**'



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

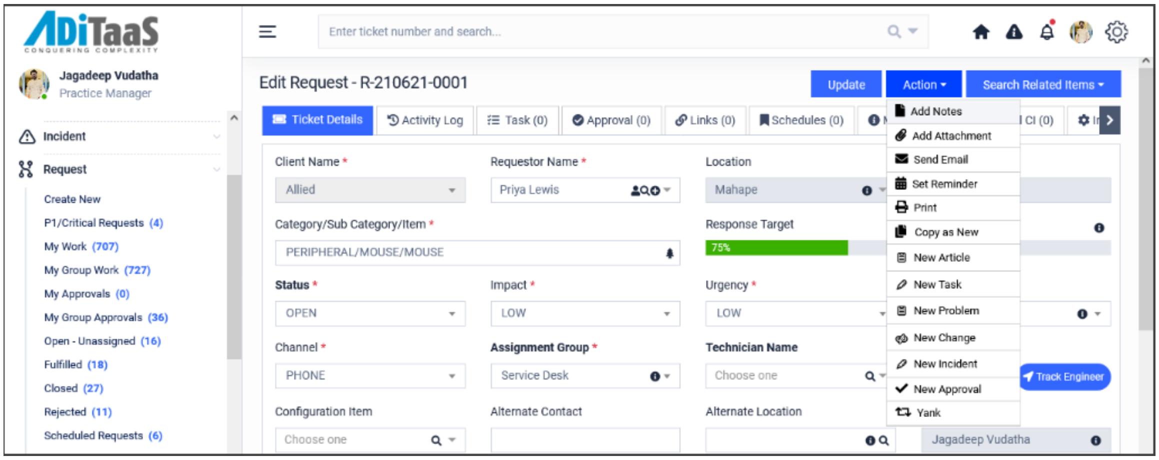
Scheduled Requests- Displays list of all scheduled requests

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

EDIT/ UPDATE REQUEST

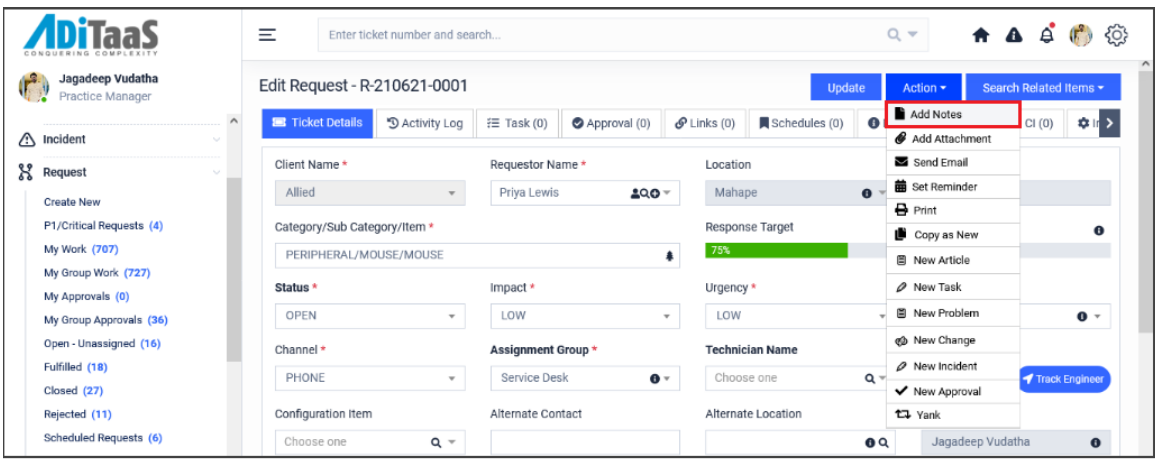
On successful creation of ticket, system will generate unique ticket id. Ticket id starts with date and number. **R-** Indicates request ticket.

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.

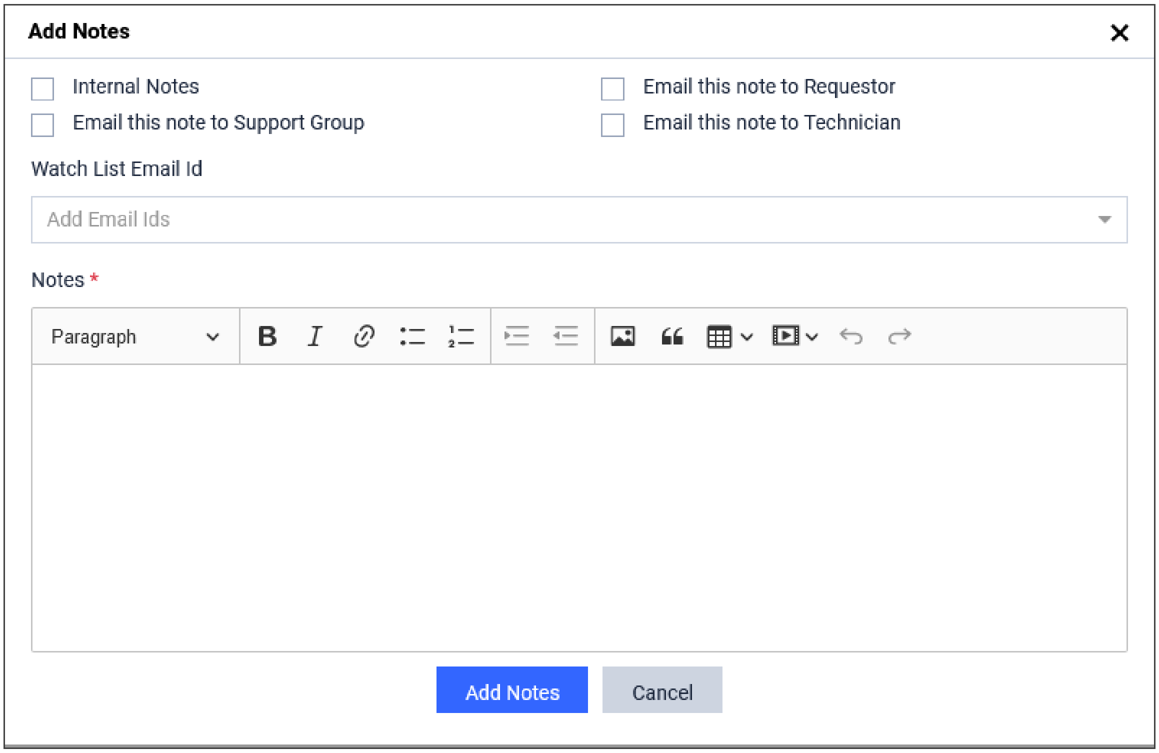


ADD NOTES

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

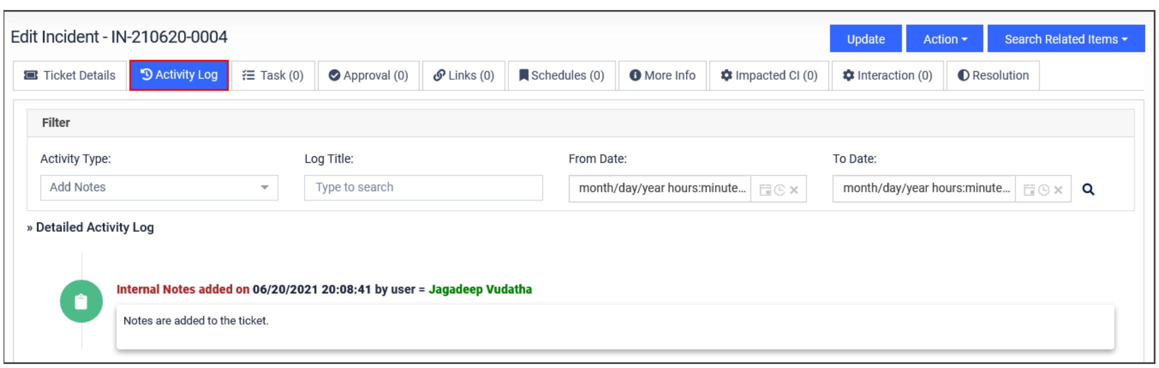


2. Add Notes dialog box will open
3. Click on checkbox to select required action items available on notes window
    - **Internal Notes:** Notes will be visible only agents. By default added notes will be visible for both agents and end users.
    - **Email this note to technician:** Email notification 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.



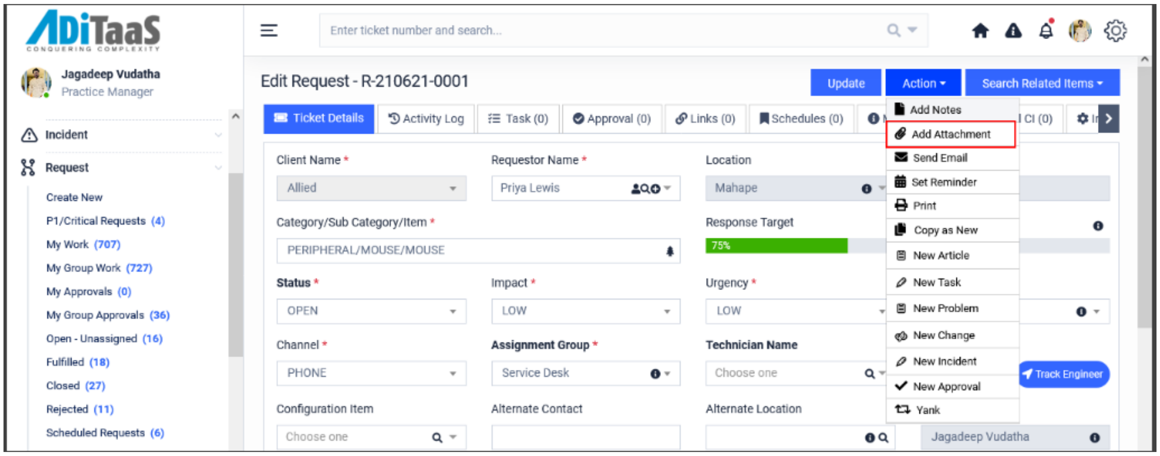
4. Enter the required comments/images/screenshots in the Notes section and click on **Add Notes.**

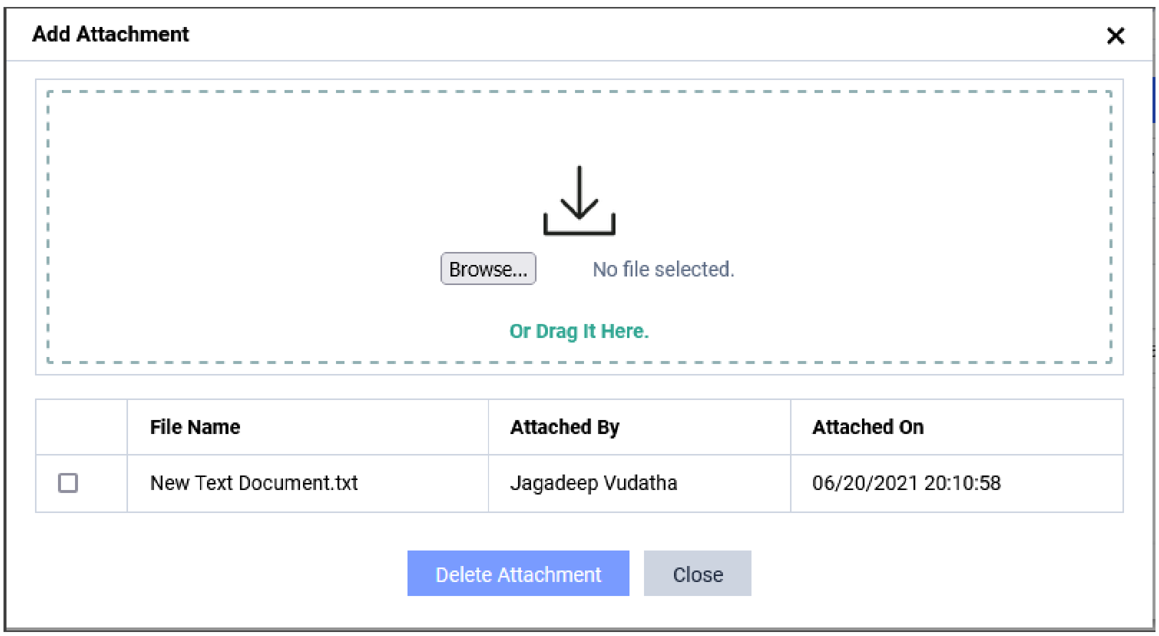
   Added information will be visible in **Activity Log**.



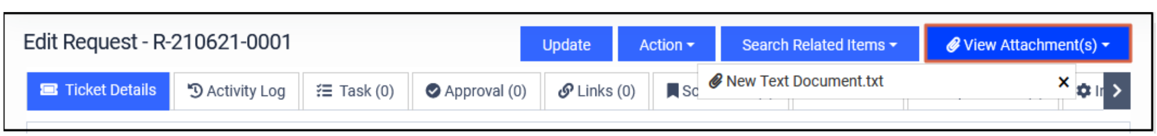
ADD ATTACHMENT:

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.



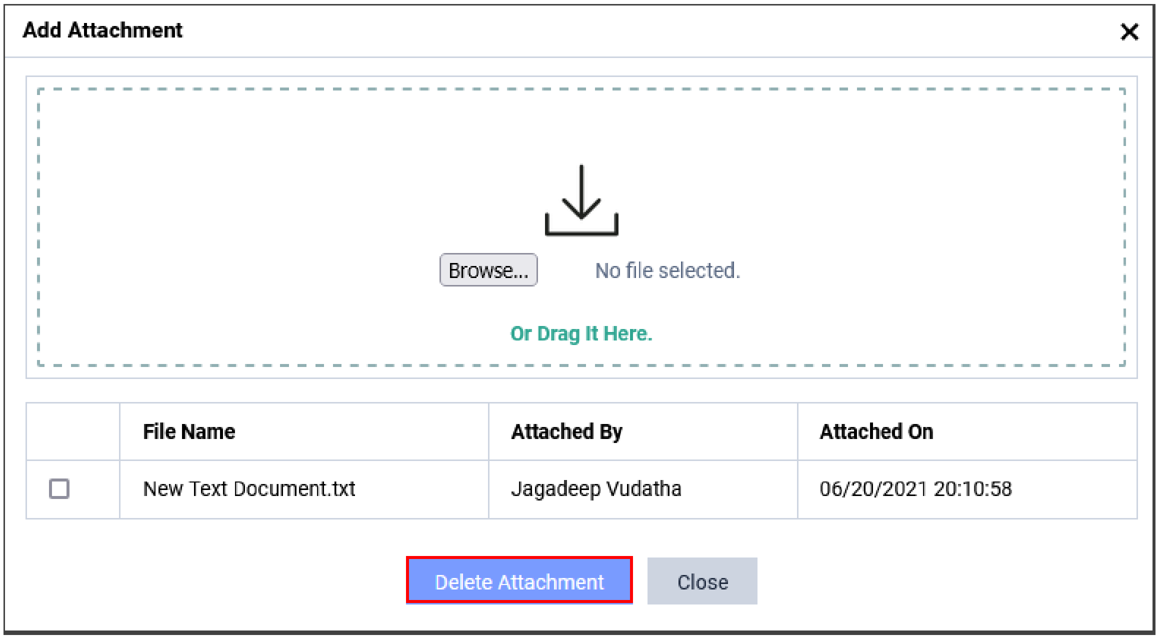


All Uploaded attachments will be visible Under '**View Attachment(s)**' tab.

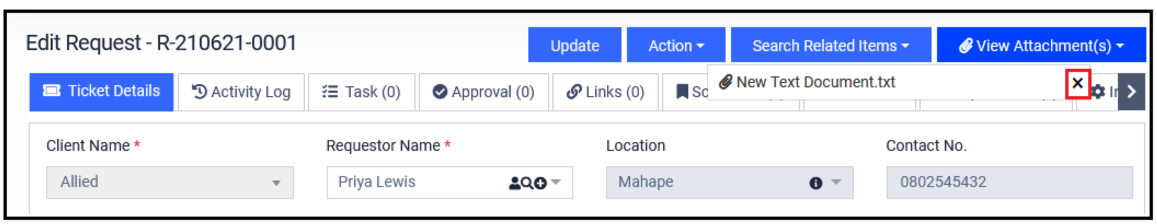


DELETE/ REMOVE ATTACHMENT:

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

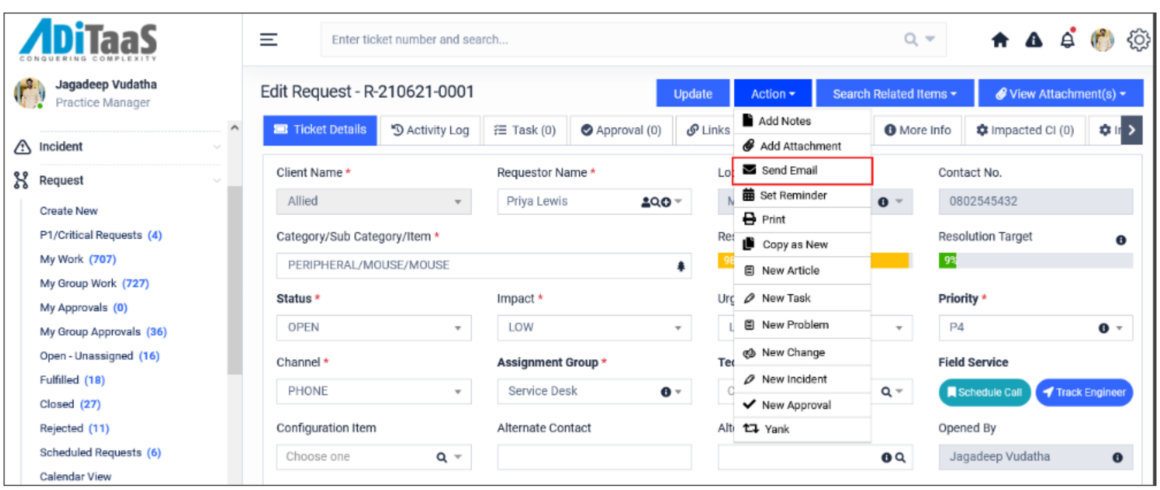


To quick delete an attachment , click on '**View Attachment(s)**' tab and go to respective attachment click on '**x**' placed next to it.

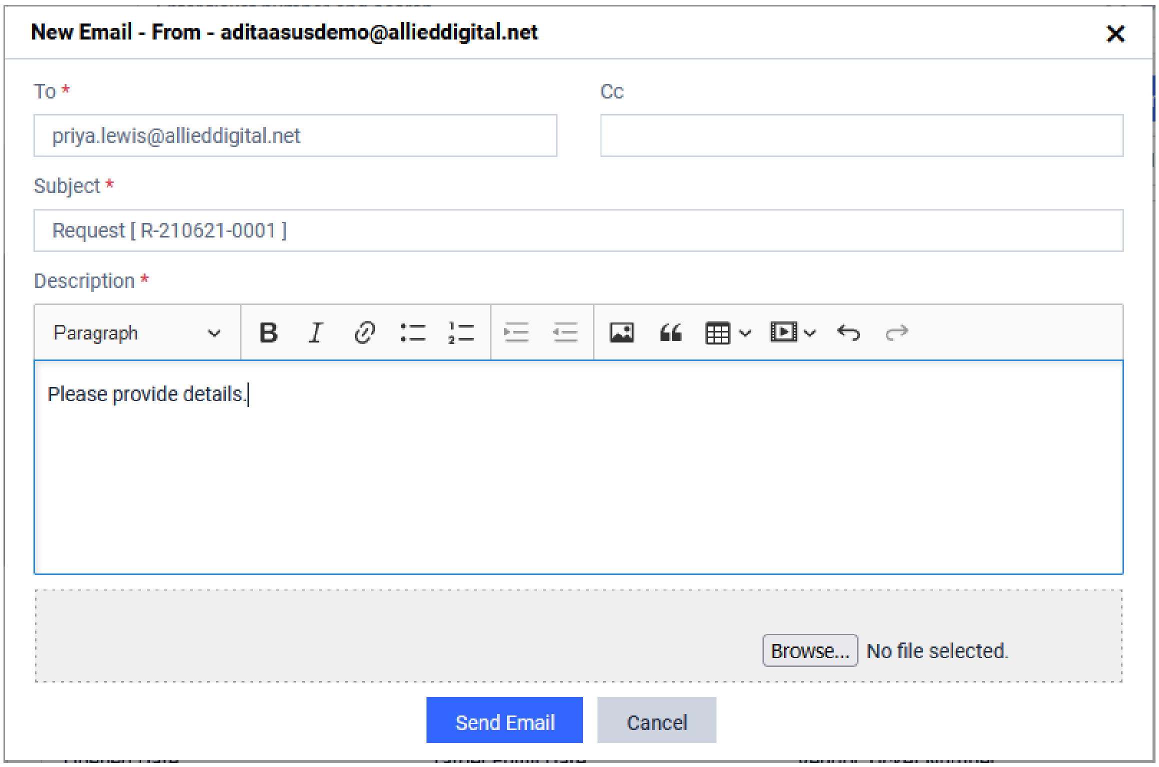


SEND MAIL:

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.

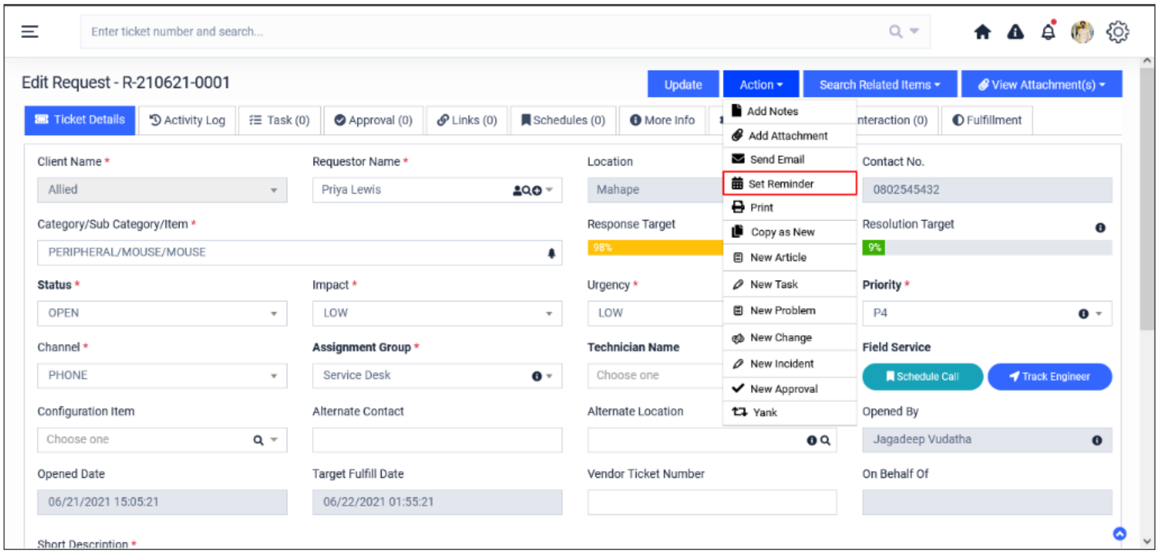


3. When complete, click on '**Send Email**'. All actions are captured in Activity Log.

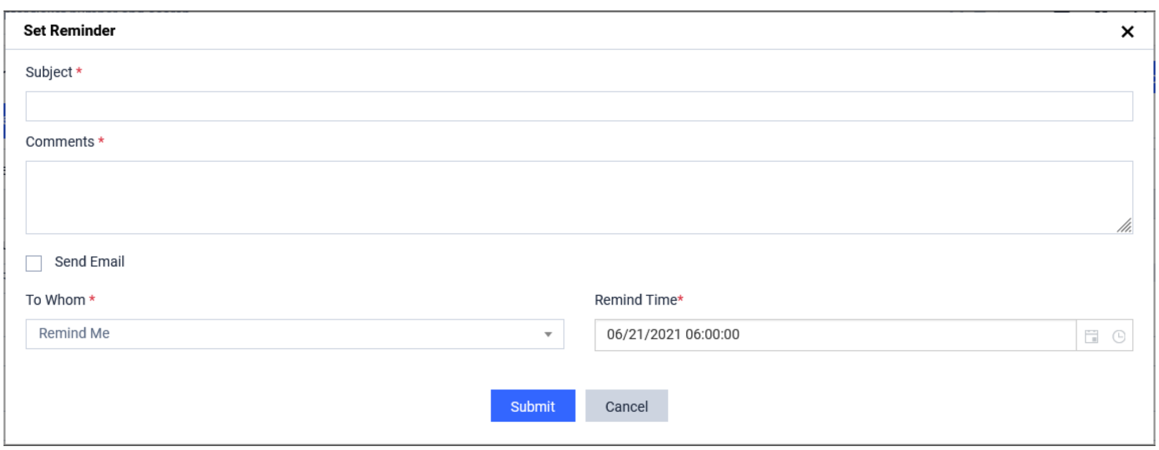
SET REMINDER

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.**

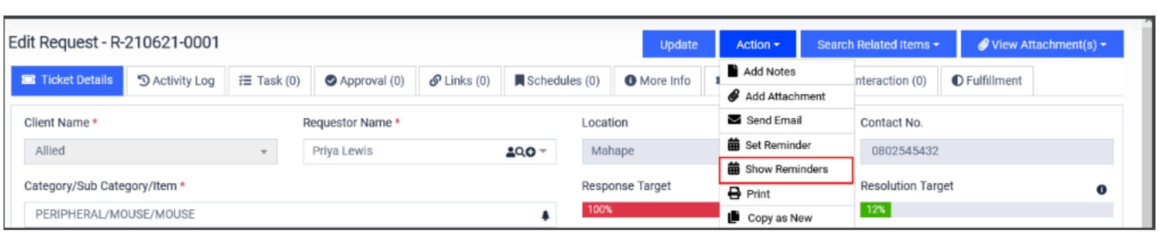


2. Set reminder dialog box is displayed. Enter the **Subject** and **Comments** in box.
3. Select checkbox, if required to send an email notification regarding the notification.
4. In select applicable option from '**To Whom**' drop down list.
    - **Remind me** – Reminder will be set for logged in 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.**



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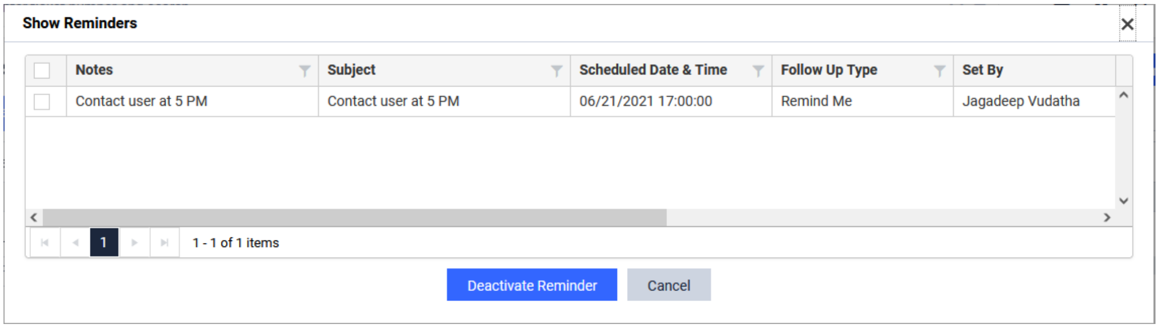
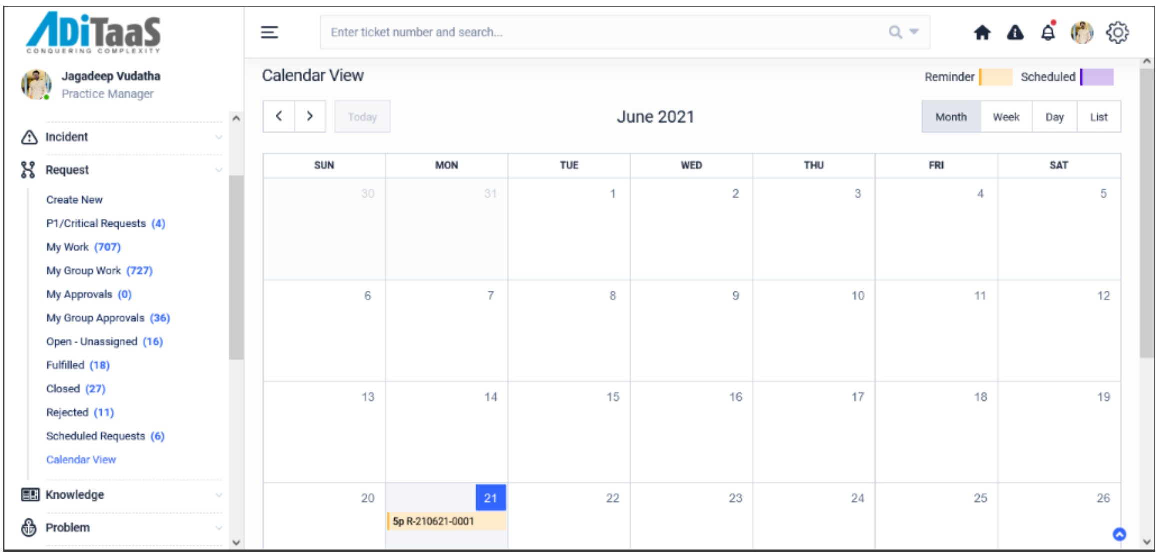
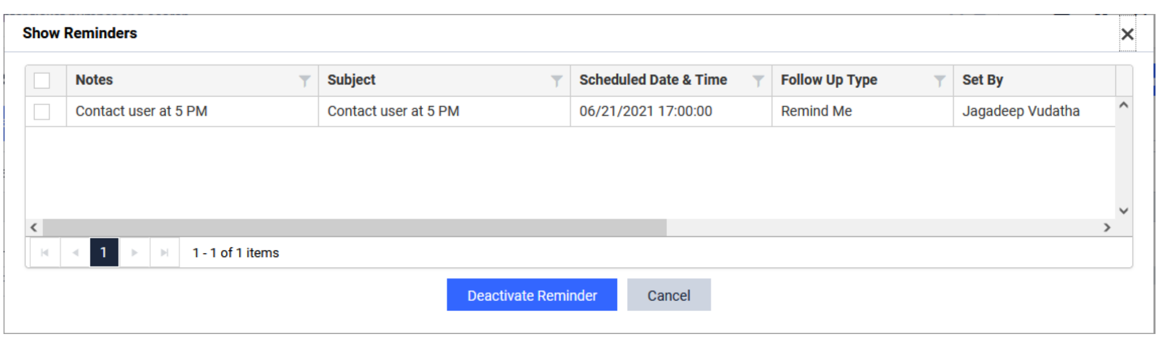




Deactivate the Reminder

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.

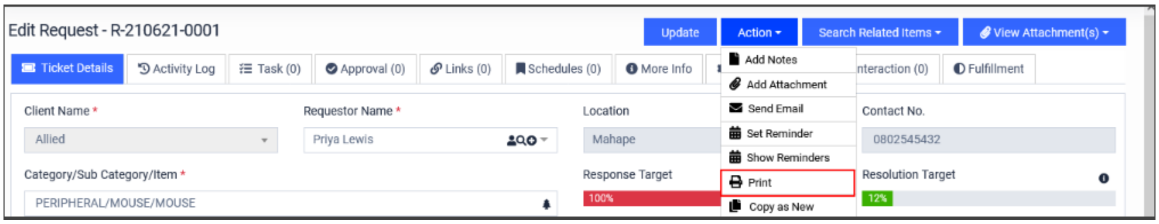


PRINT REQUEST

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**



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Print Cancel

Request Details

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

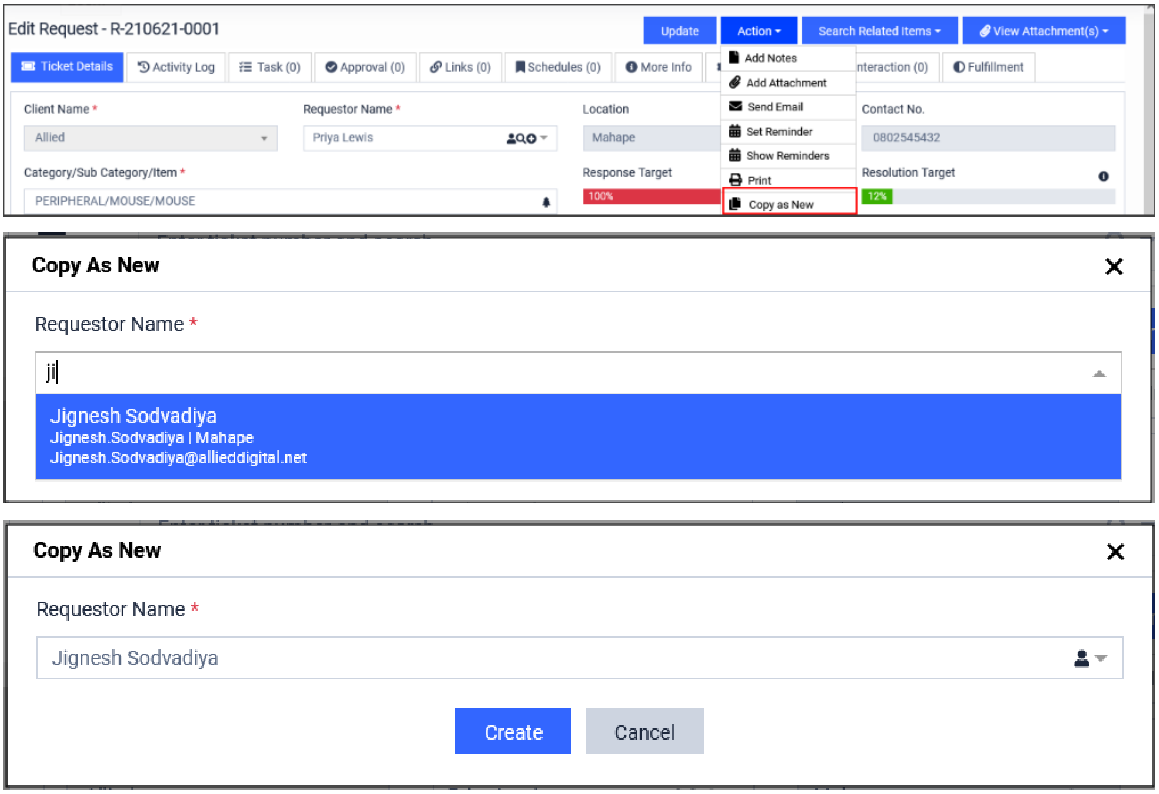
Email Sent On 06/21/2021 15:05:29 by user = SYSTEM.ADMIN

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.

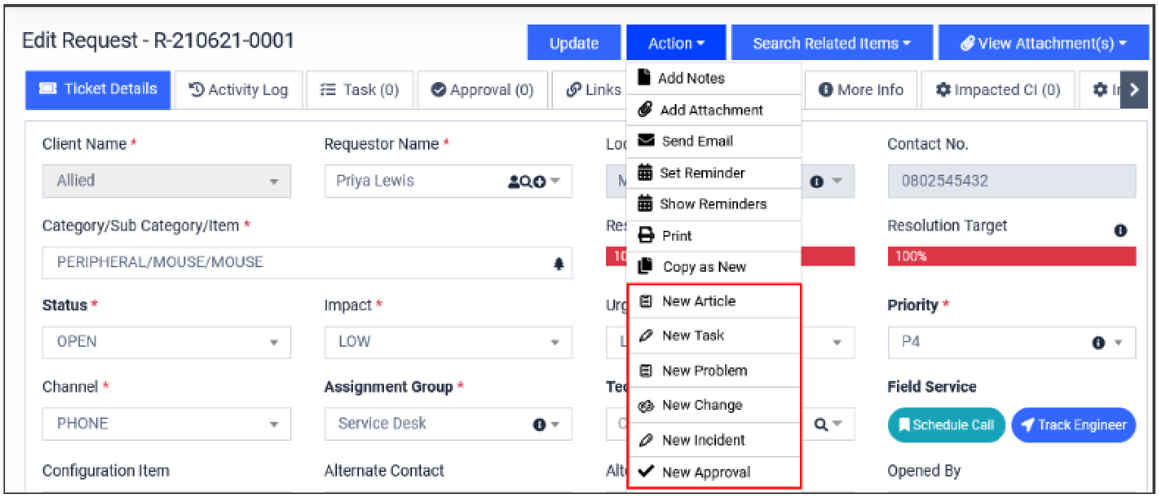
1. Click on **Action → Copy as New**
2. Copy As New dialog box will open to enter the **Requestor Name**



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

QUICK LINKS TO CREATE TICKET FROM REQUEST

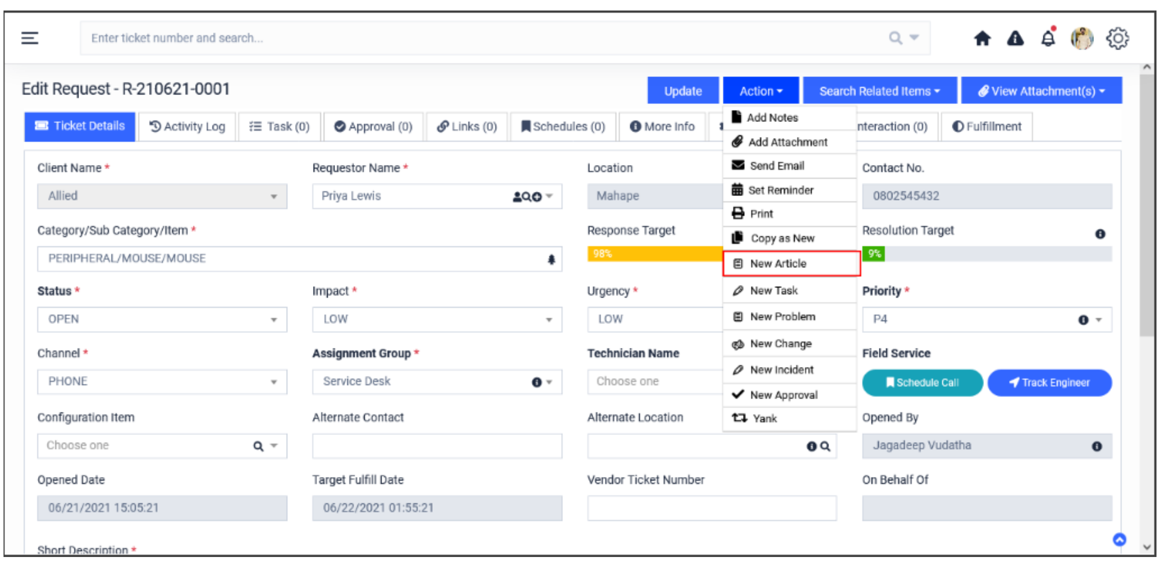
Following links helps to create other module tickets from request ticket

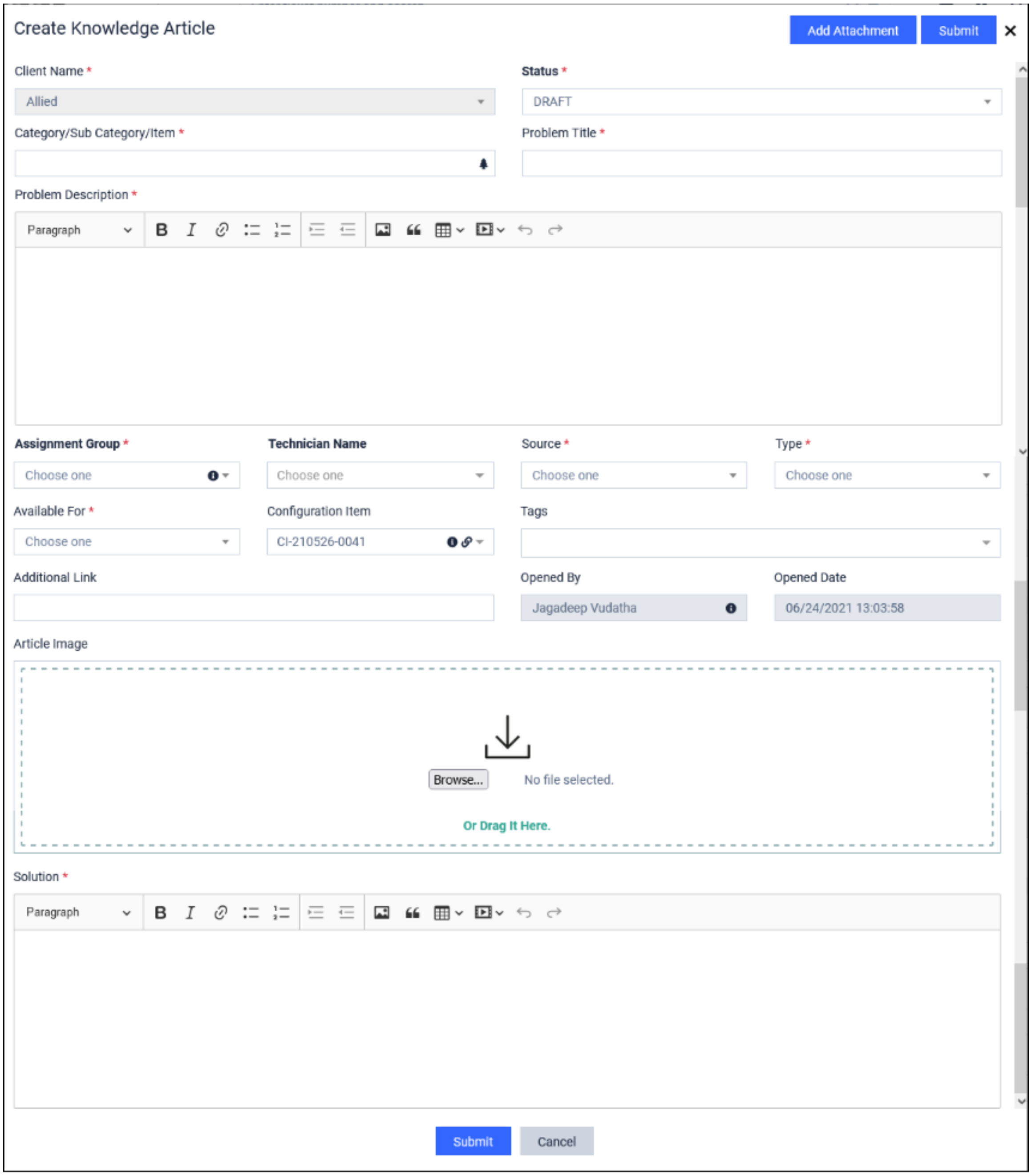


New Article

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.

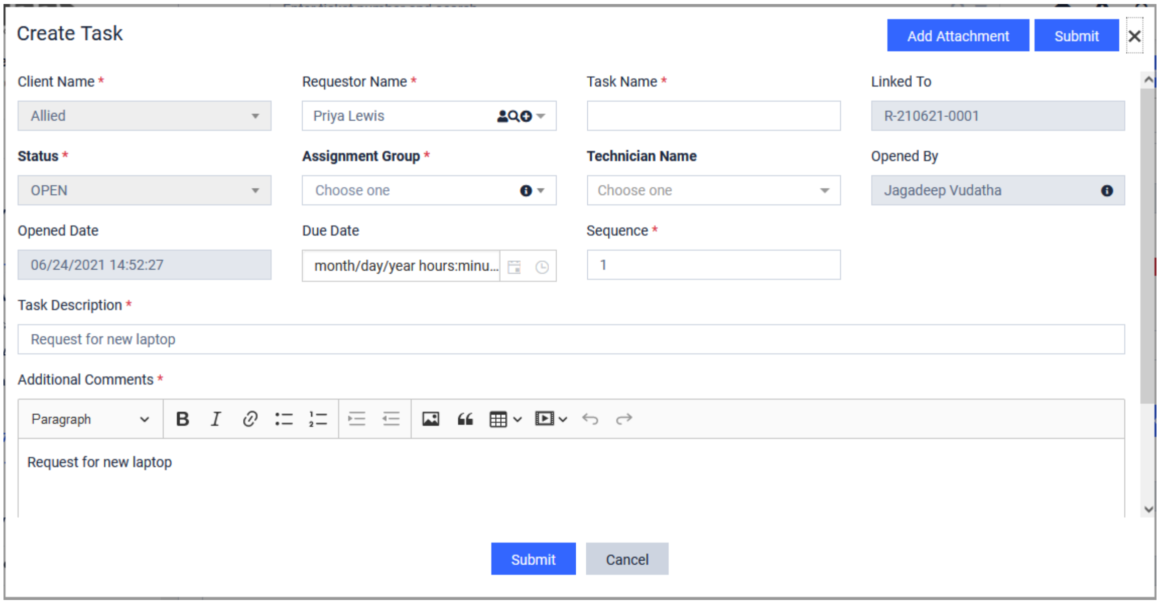




New Task

Allows to raise a new task ticket from request ticket.

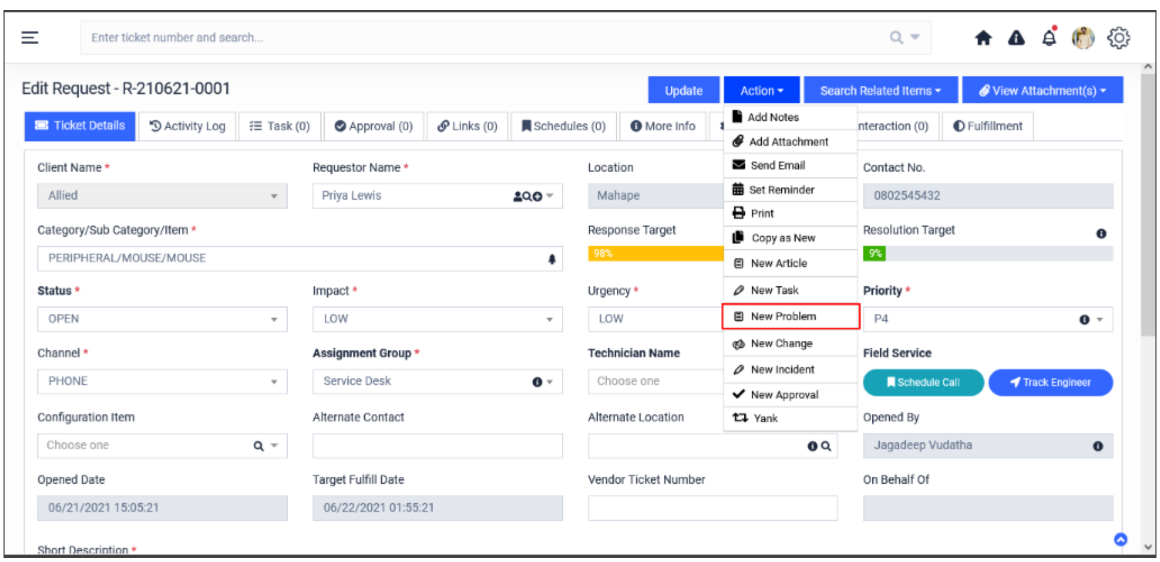
1. Go to **Action → New Task**
2. Enter the new task details and click on submit
3. New created task ticket will be linked to request ticket.

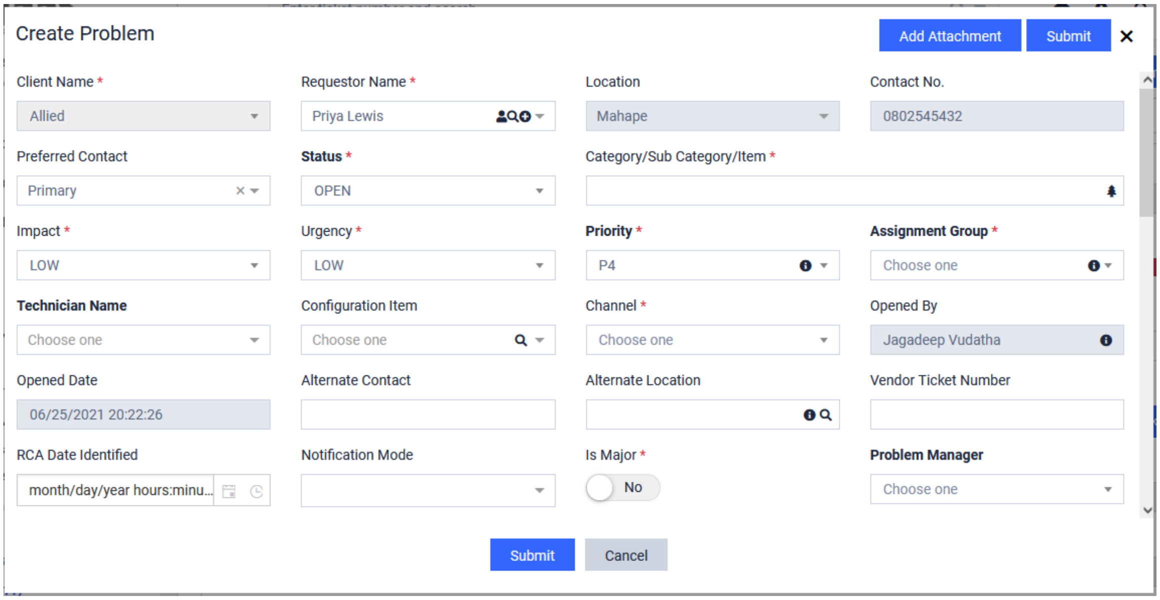


New Problem

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.

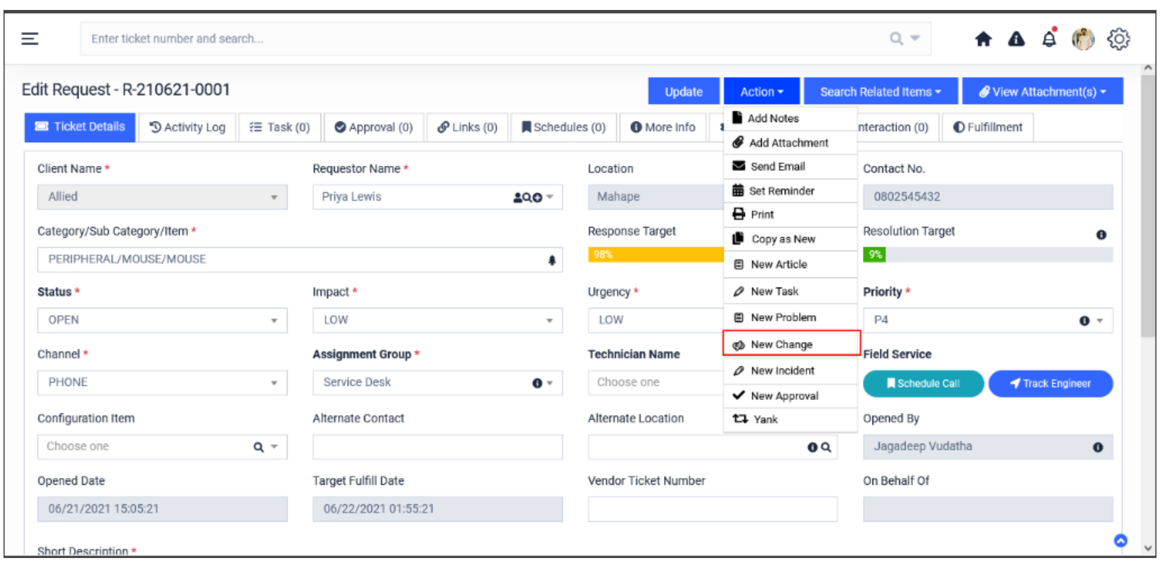


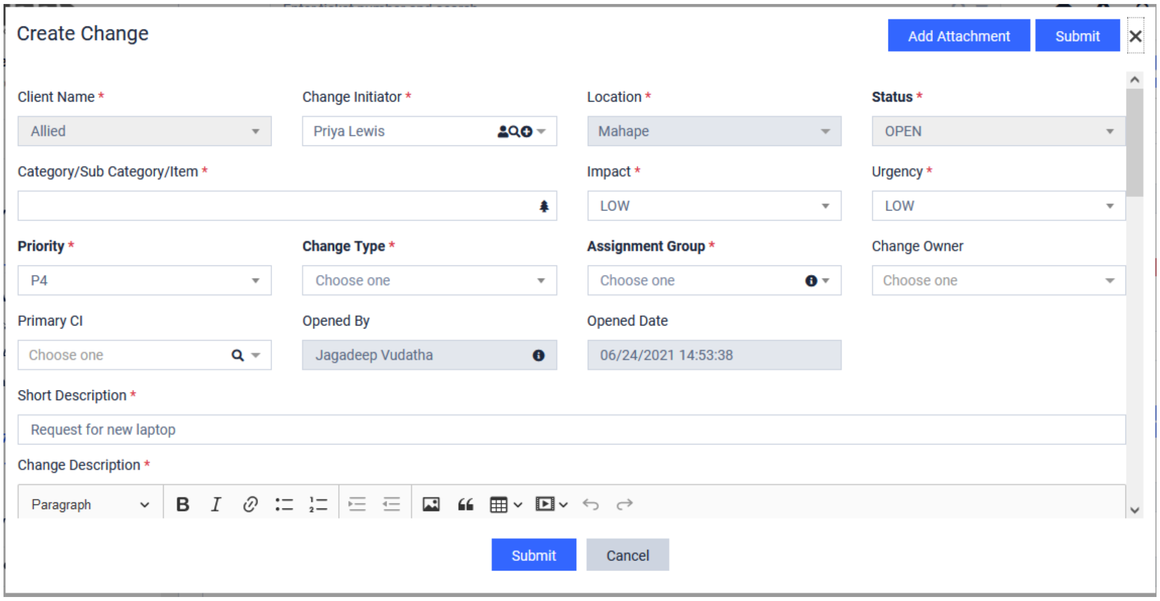


New Change

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.

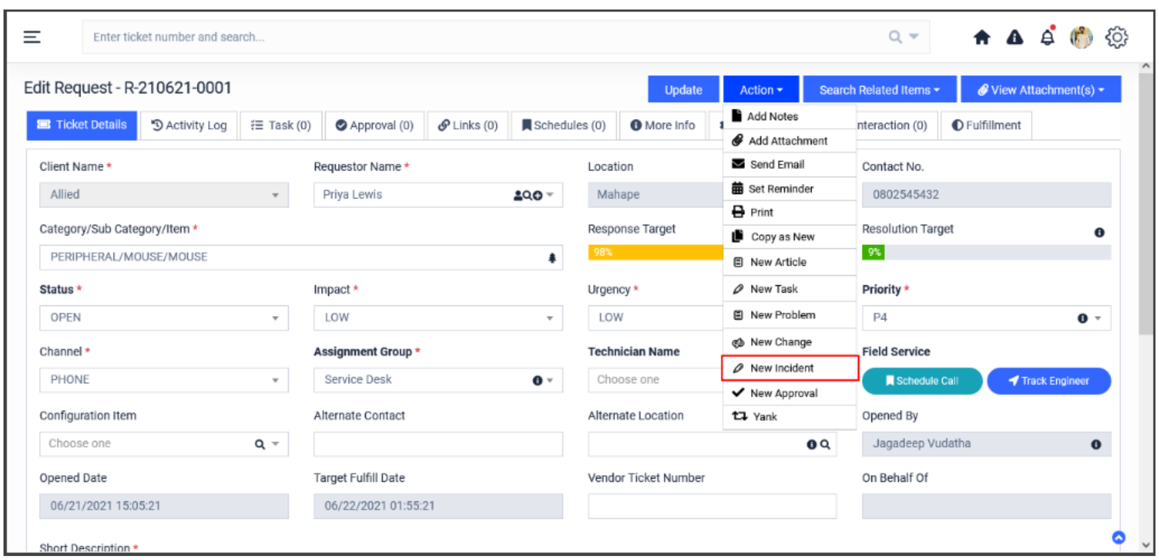


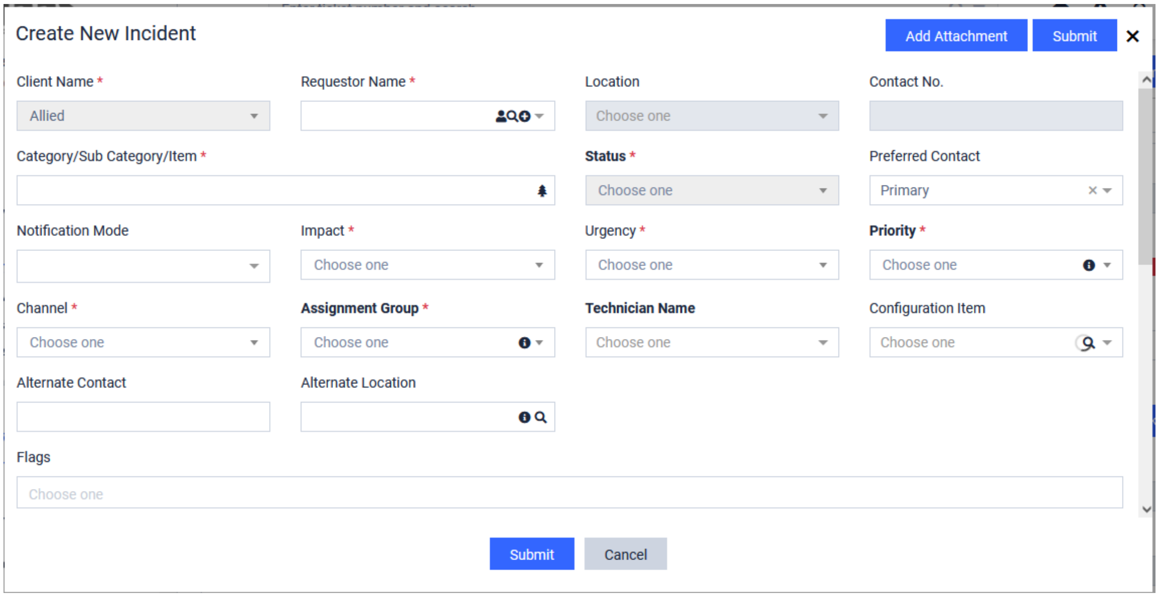


New Incident

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.

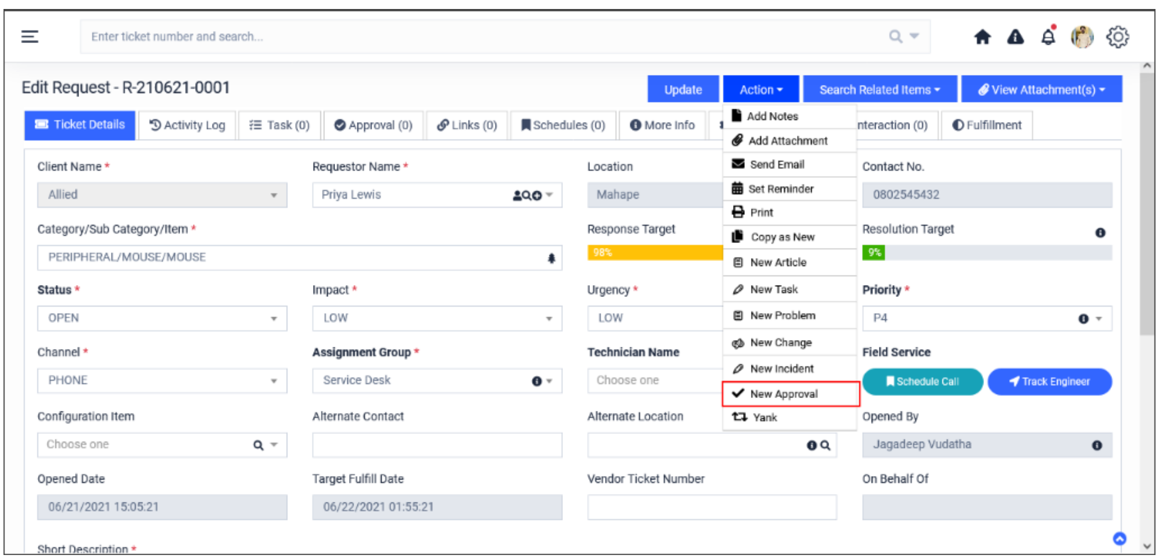


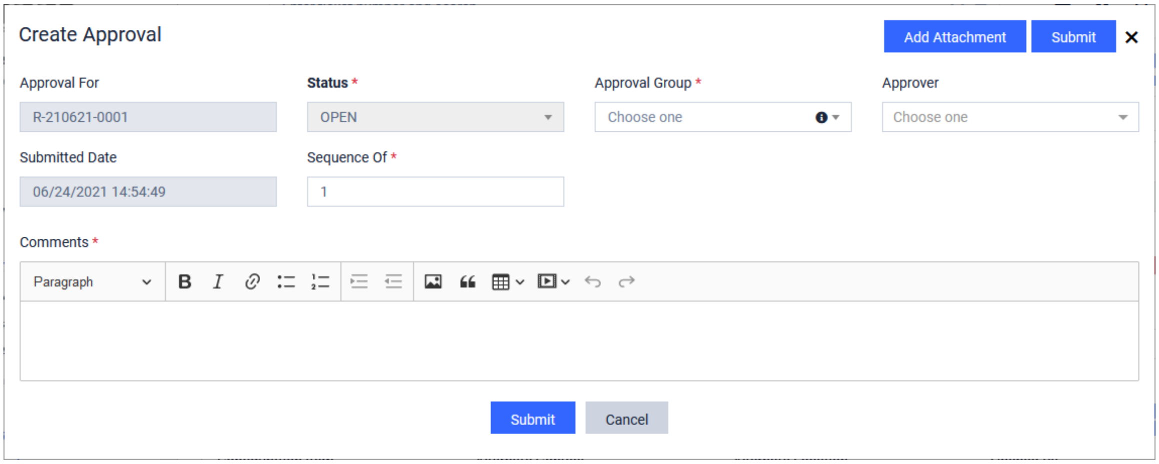


New Approval

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.





REQUEST ACTIVITY LOG

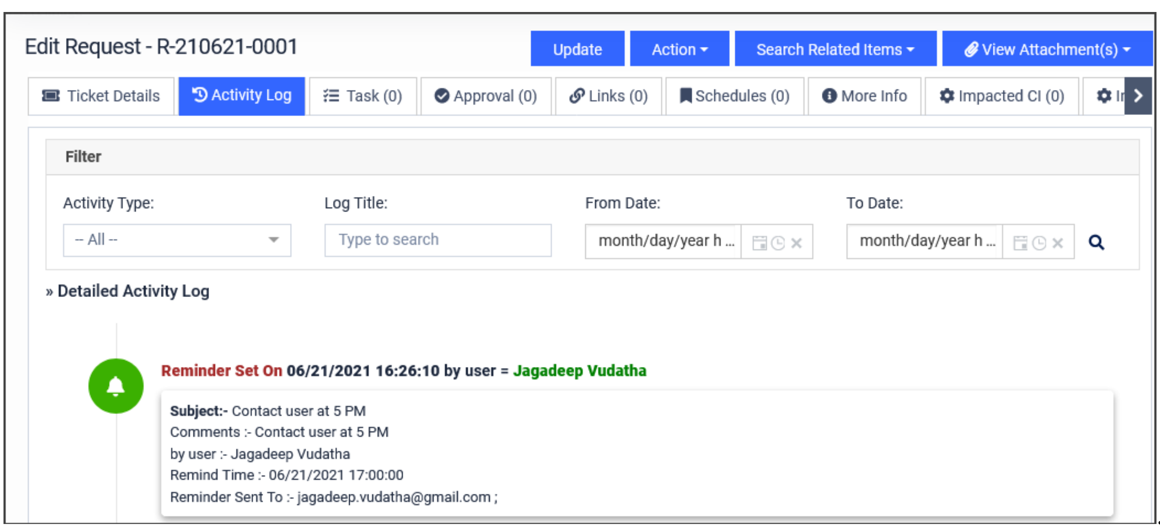
Activity log captures all actions performed on ticket from request creation to closure with date/time stamp along with agent id. All modification performed on ticket is auto captured. From the creation of ticket to resolution all activities are captured with order. All activities like add notes, add 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

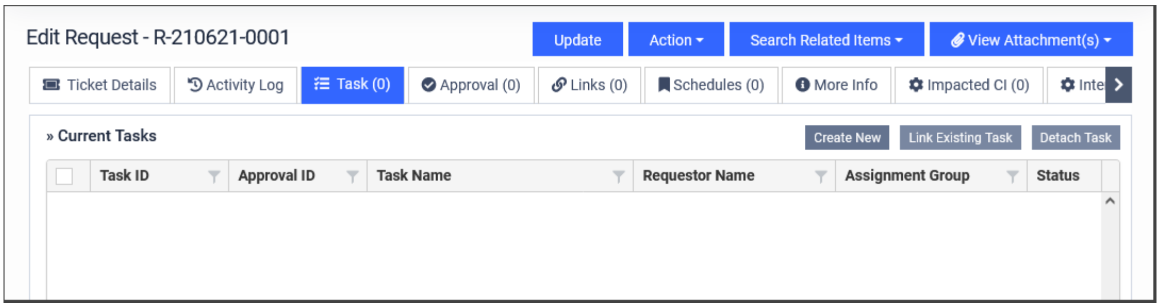


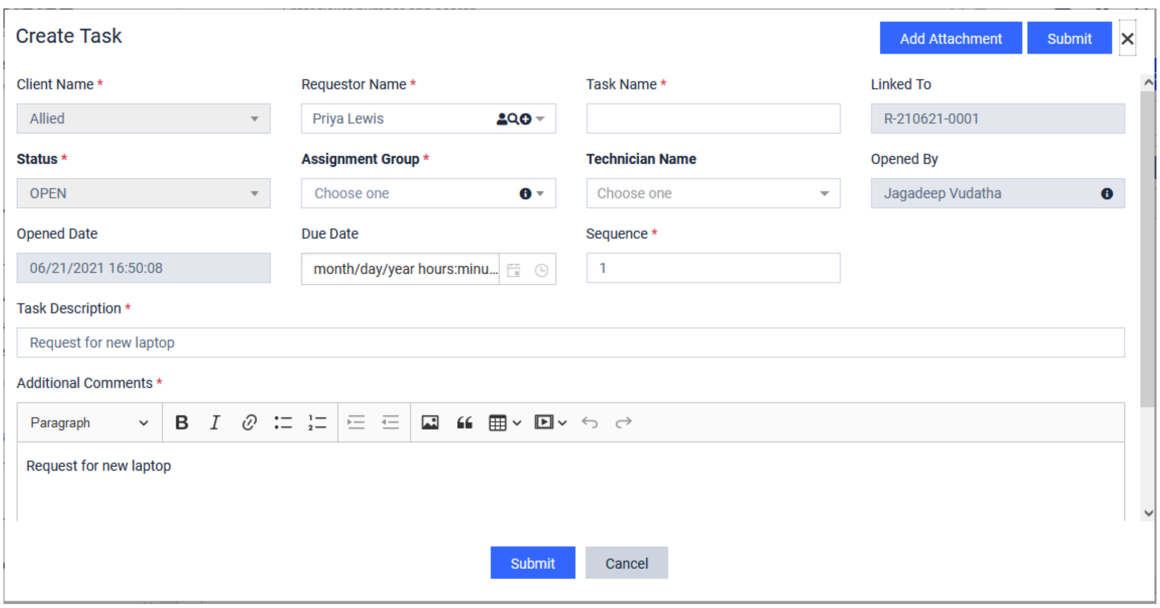
Note: Logs in the tool protected from alteration after-the-fact.

TASK

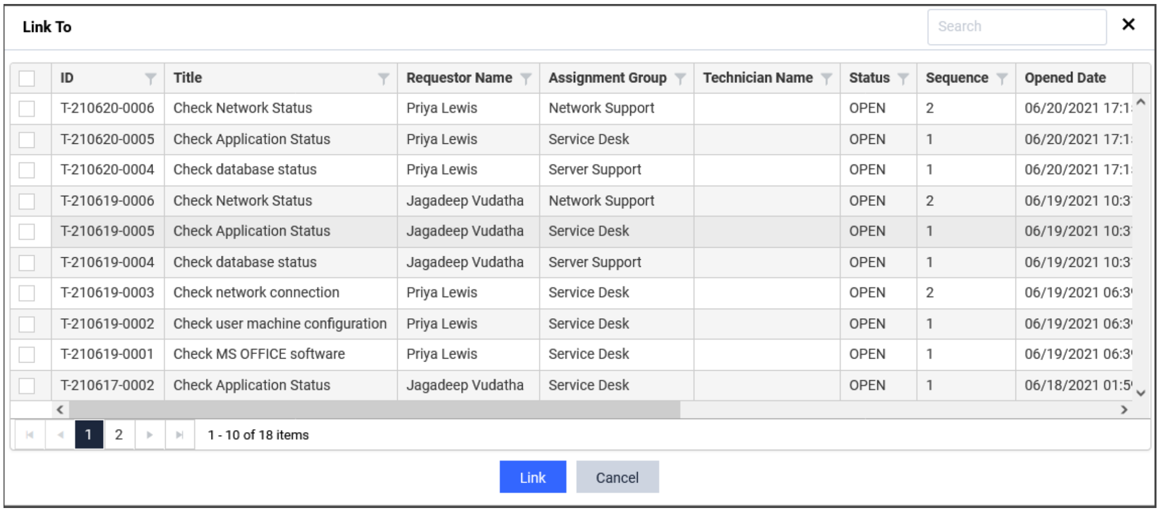
Agent can create a new Task and link to request or open any existing tasks and can link to request. Request ticket cannot be resolved until all linked tasked are closed.

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

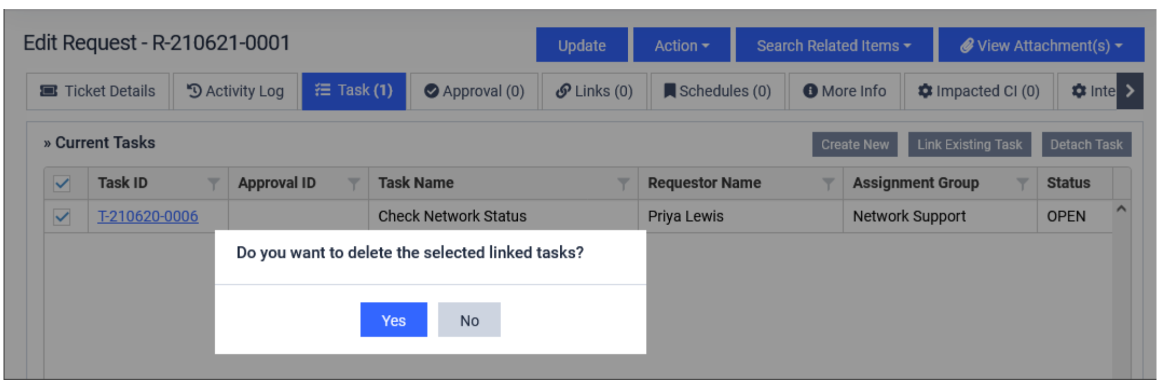




Link Existing Task- To link existing link Tasks, click on **Task → Link Existing Task** Displays list of existing Tasks. Agent can link one or more tasks to request by clicking on checkboxes.



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



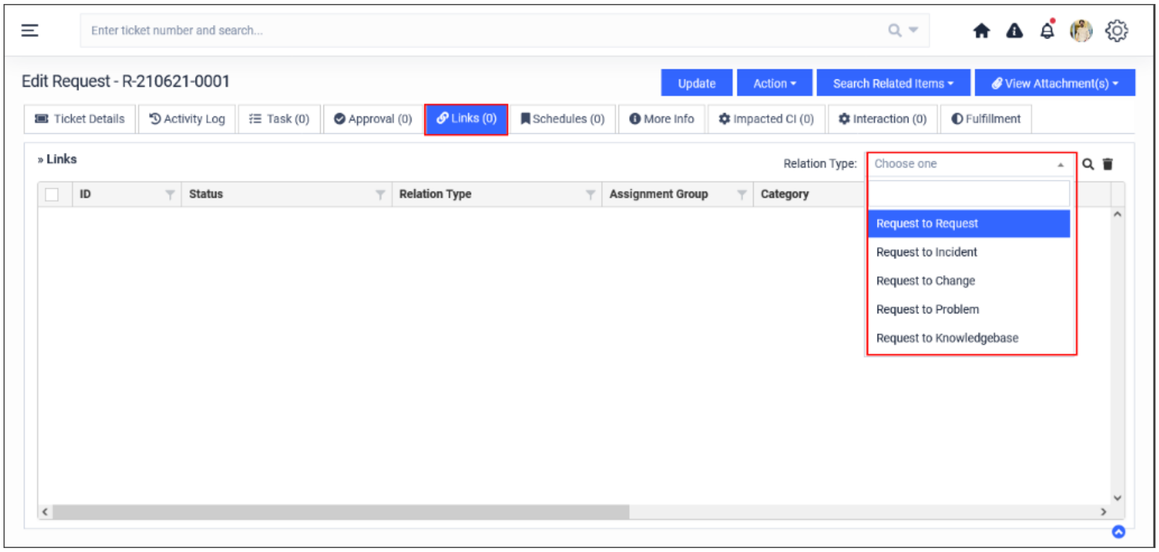
LINKING TICKETS

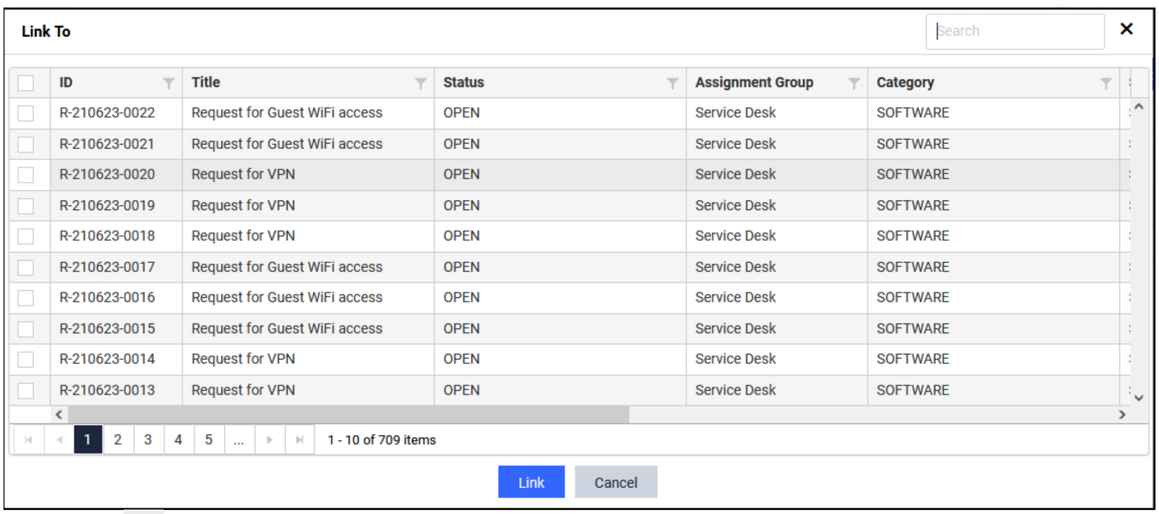
This tab allows agents to create relationships by linking requests to other tickets in system.

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**'

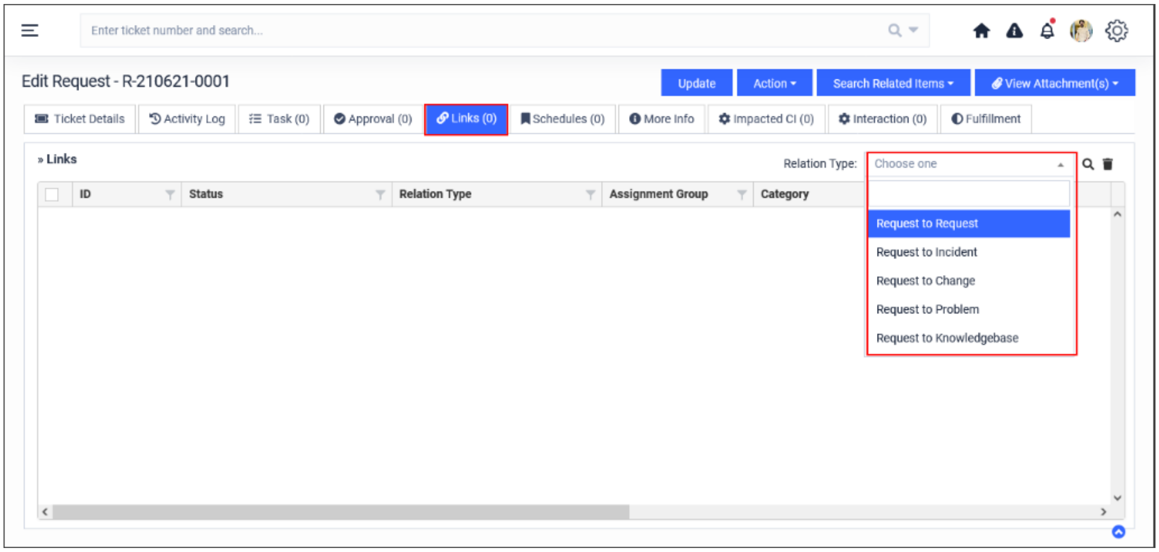


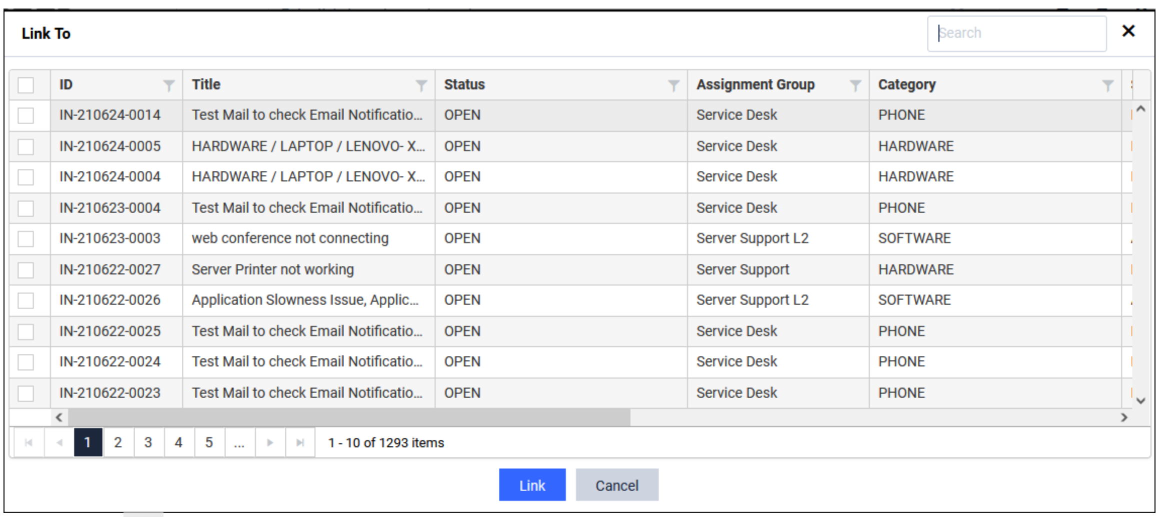


4. Click on icon, which will display all open requests in a pop-up box. Agent can select requests and attach to request.
5. Click on Link
6. Linked ticket will be visible on Links tab.

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**

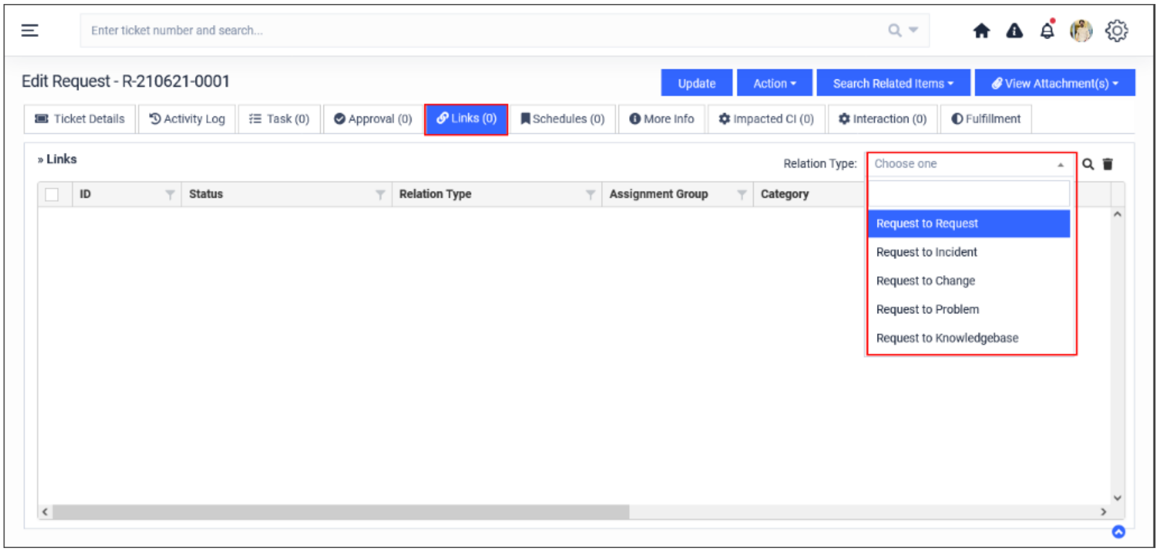


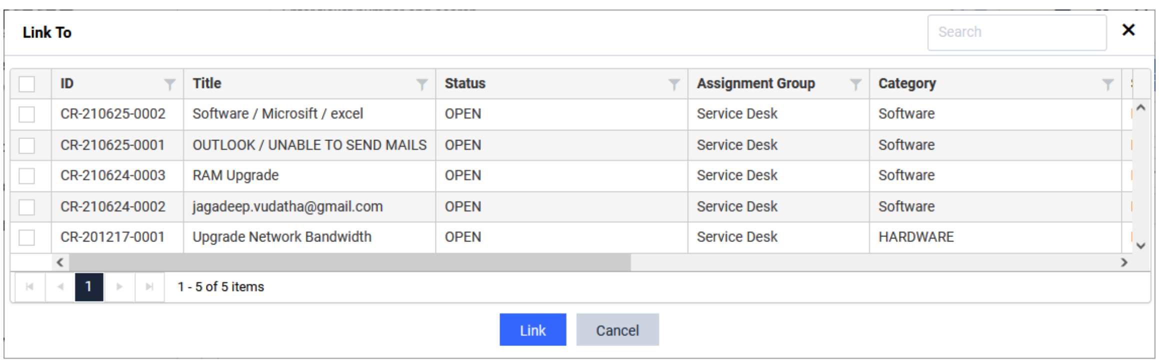


4. Click on icon, which will display all open incidents in a pop-up box. Agent can select incidents and attach to request.
5. Click on Link
6. Linked ticket will be visible on Links tab.

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**'

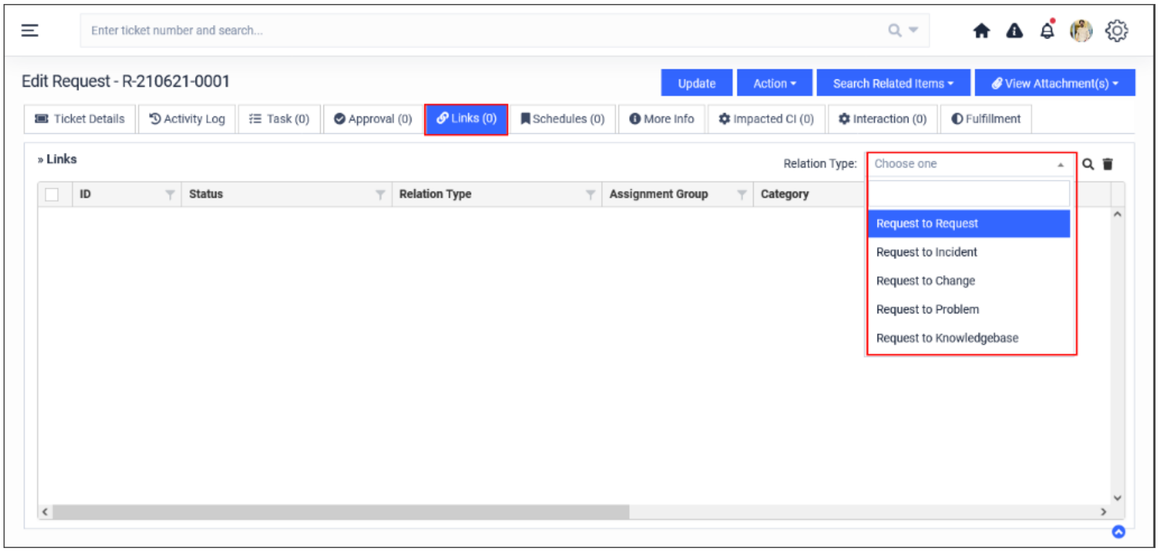


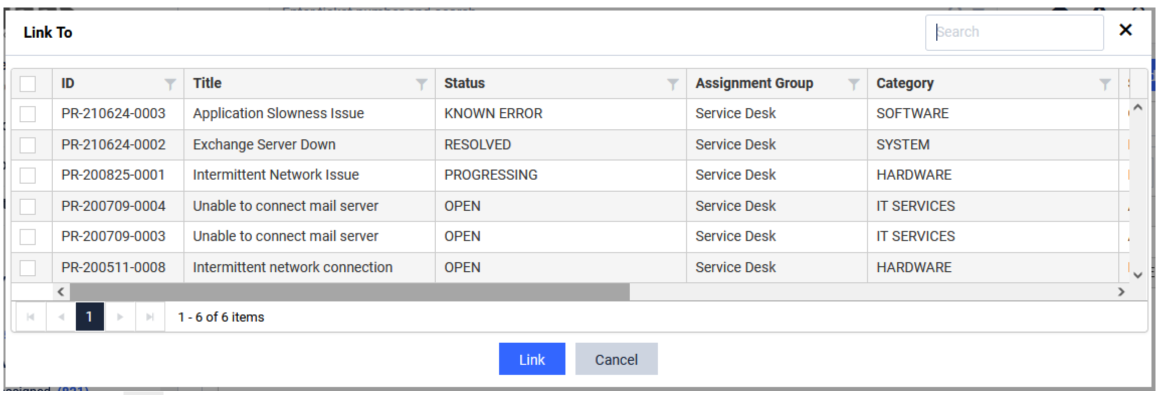


4. Click on icon, which will display all open changes in a pop-up box. Agent can select changes and attach to request.
5. Click on Link
6. Linked ticket will be visible on Links tab

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**'

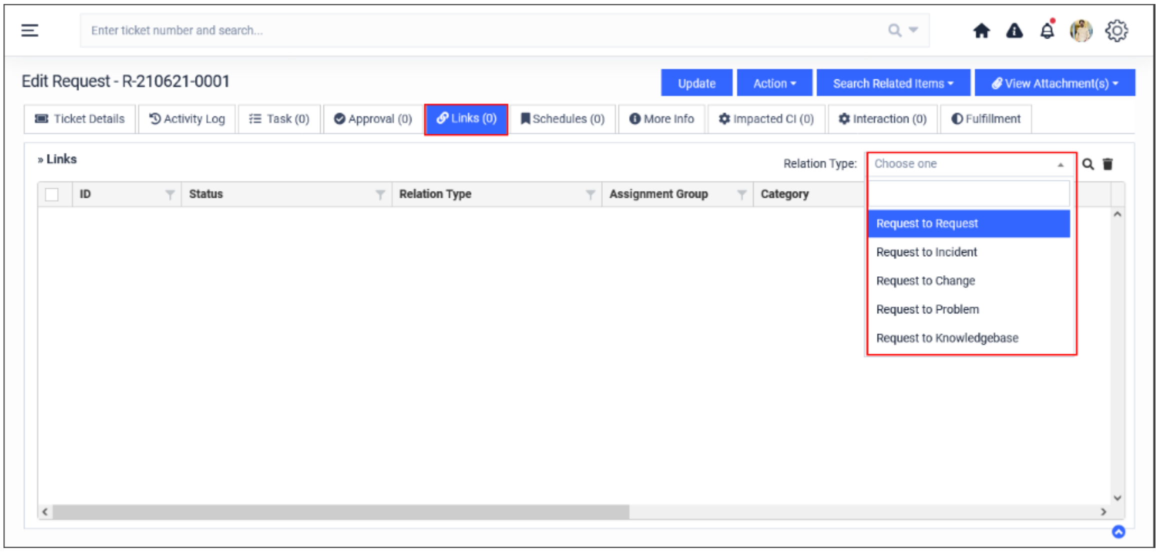


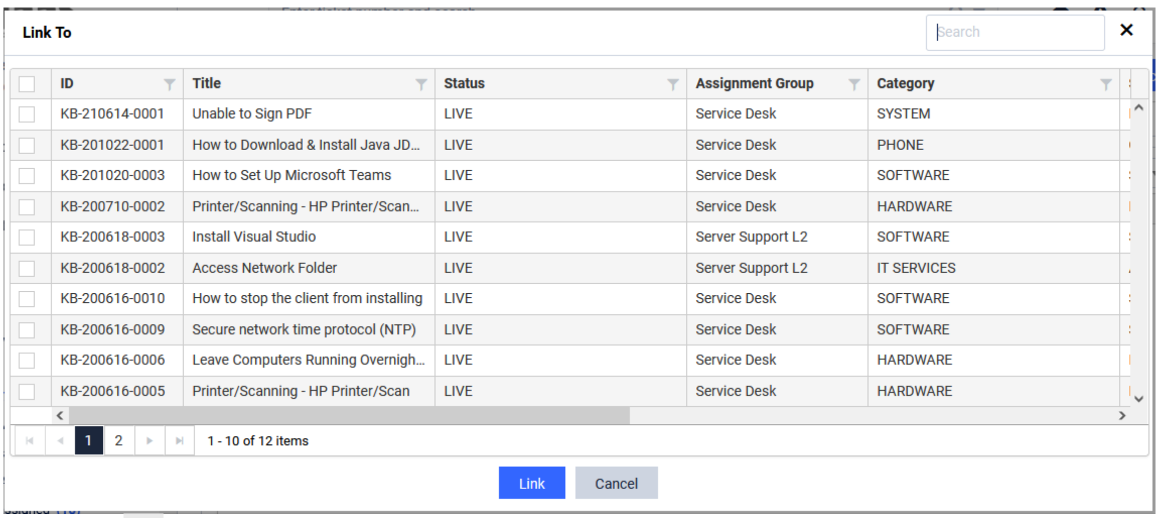


4. Click on icon, which will display all open problems in a pop-up box. Agent can select problems and attach to request.
5. Click on Link
6. Linked ticket will be visible on Links tab

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**





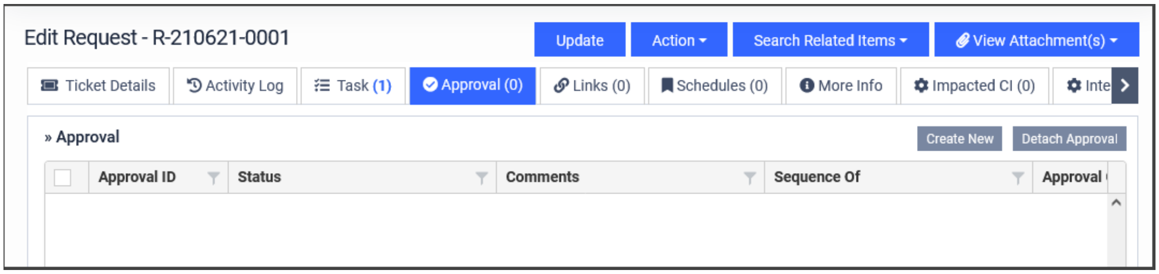
4. Click on icon, which will display all articles in a pop-up box. Agent can select article and attach to request.
5. Click on Link
6. Linked ticket will be visible on Links tab

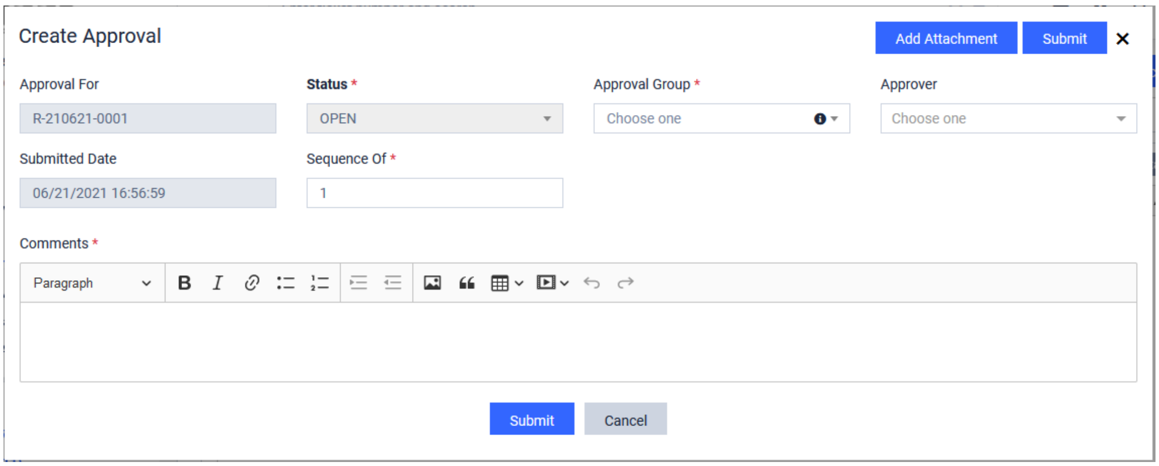
Detach Ticket: The agent can detach a linked incident or any other ticket by selecting a ticket and clicking on the Delete button.

APPROVALS

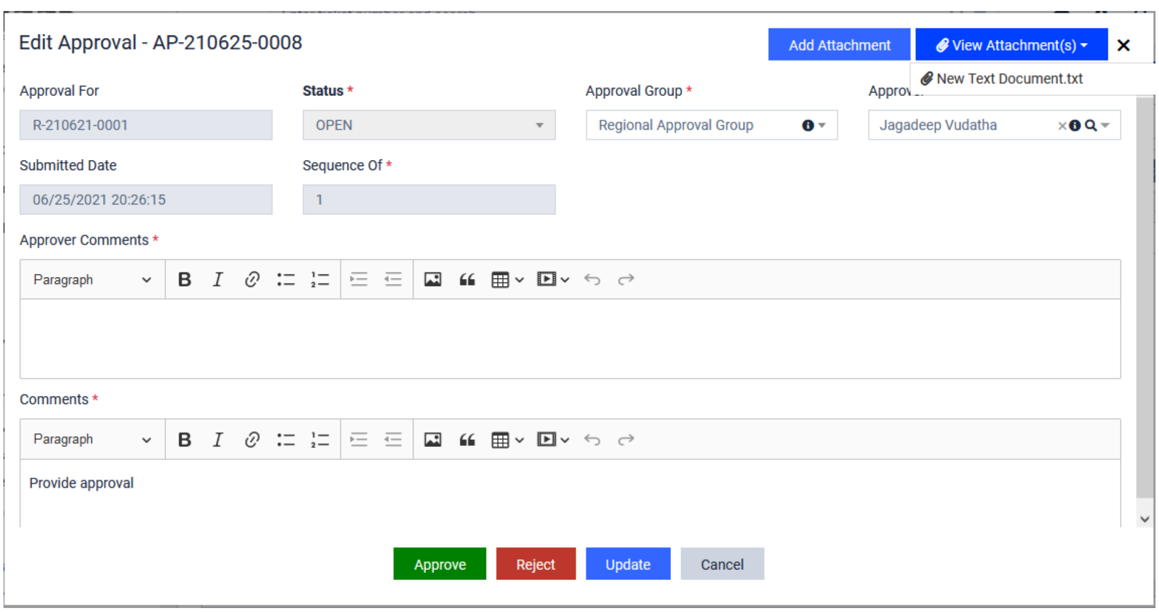
If a ticket requires formal approval before proceeding the case, Agent can create an approval manually by clicking on **Approval→ Create New.**

Enter all * marked following mandatory fields.



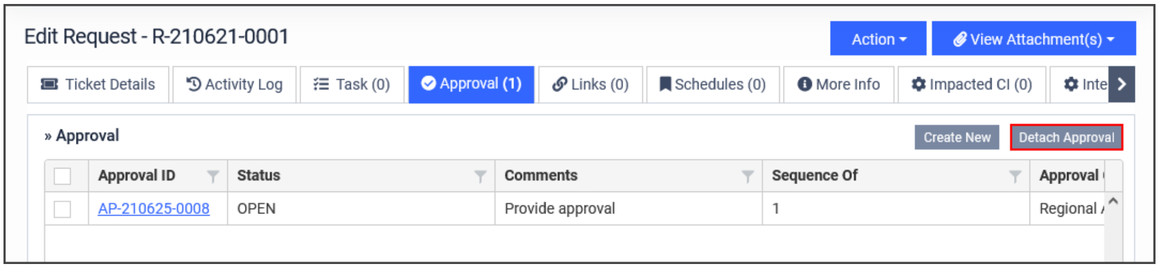


On submitting a request for approval, approver will receive an approval mail with a link to approve or reject the request.



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**.

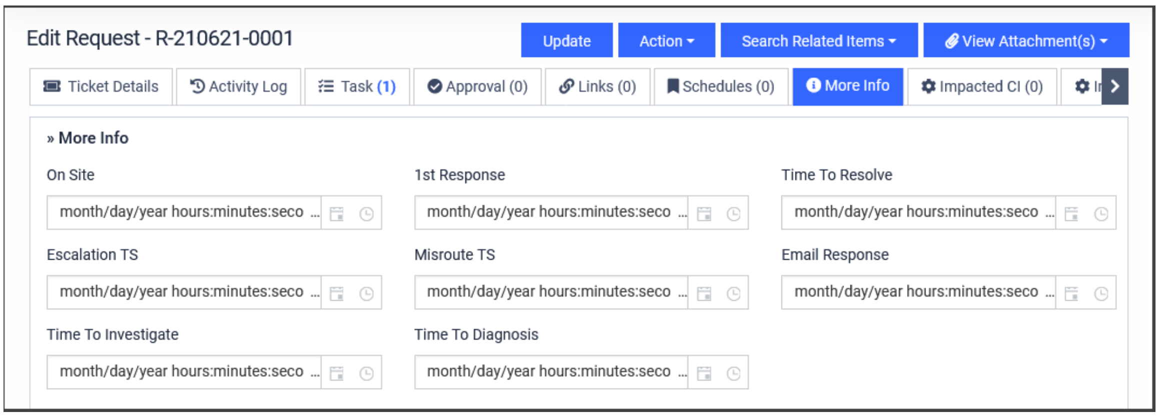
To detach any approval, click on '**Detach Approval**'.



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

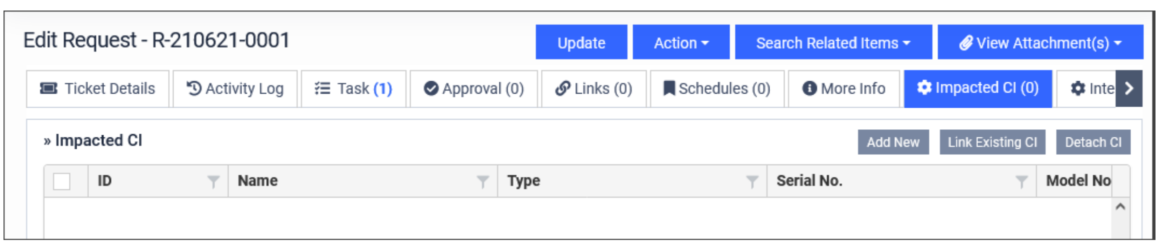
MORE INFO

Tab provides information regarding onsite visits and Escalations.

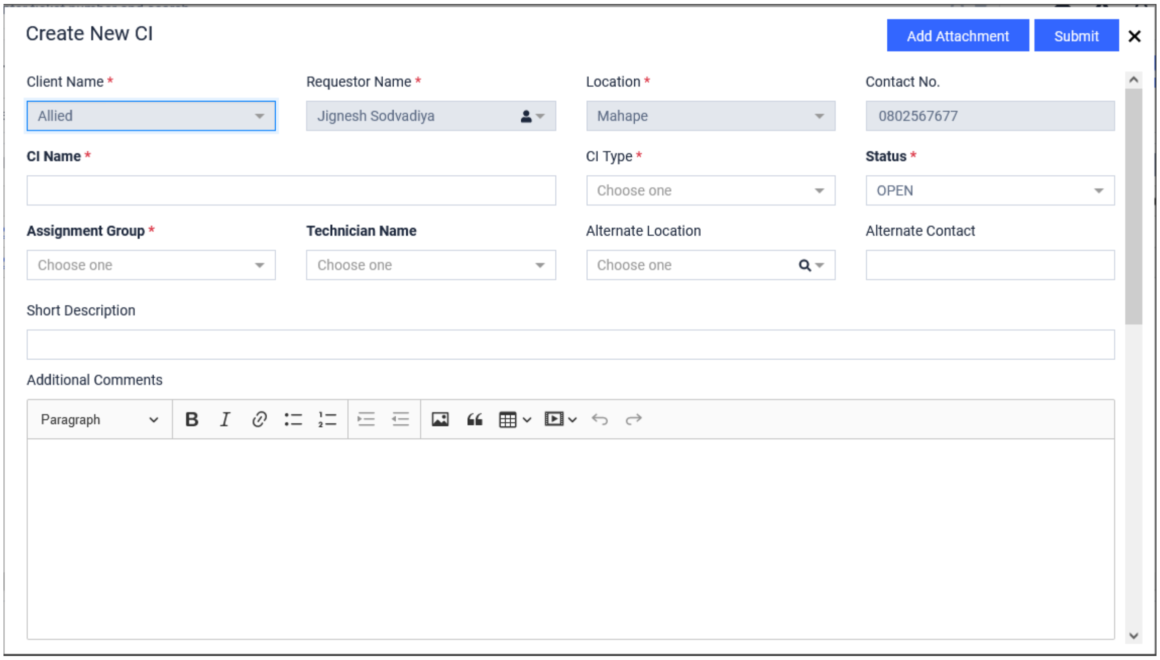


IMPACTED CI

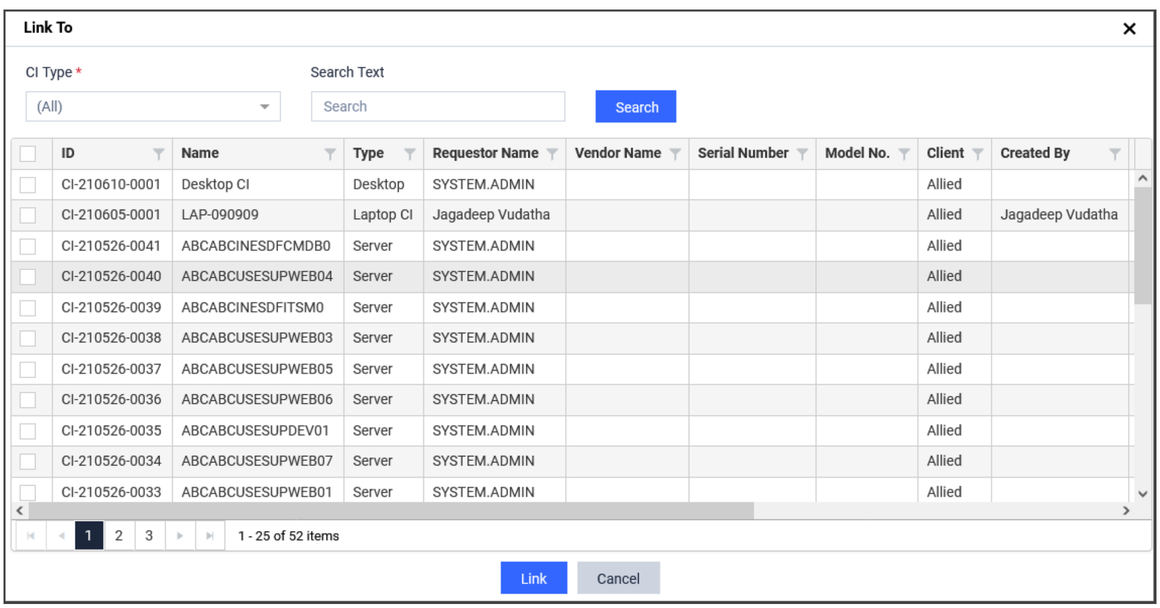
Related configuration items can be added under 'Impacted CI' tab.



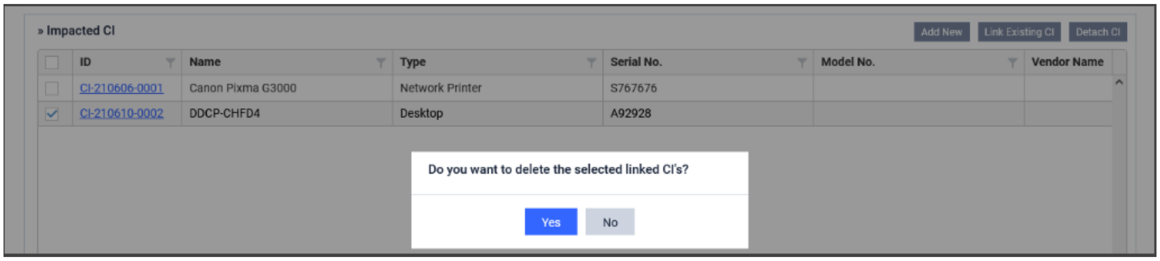
Add New- Allows to create a new CI and link to request.



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



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

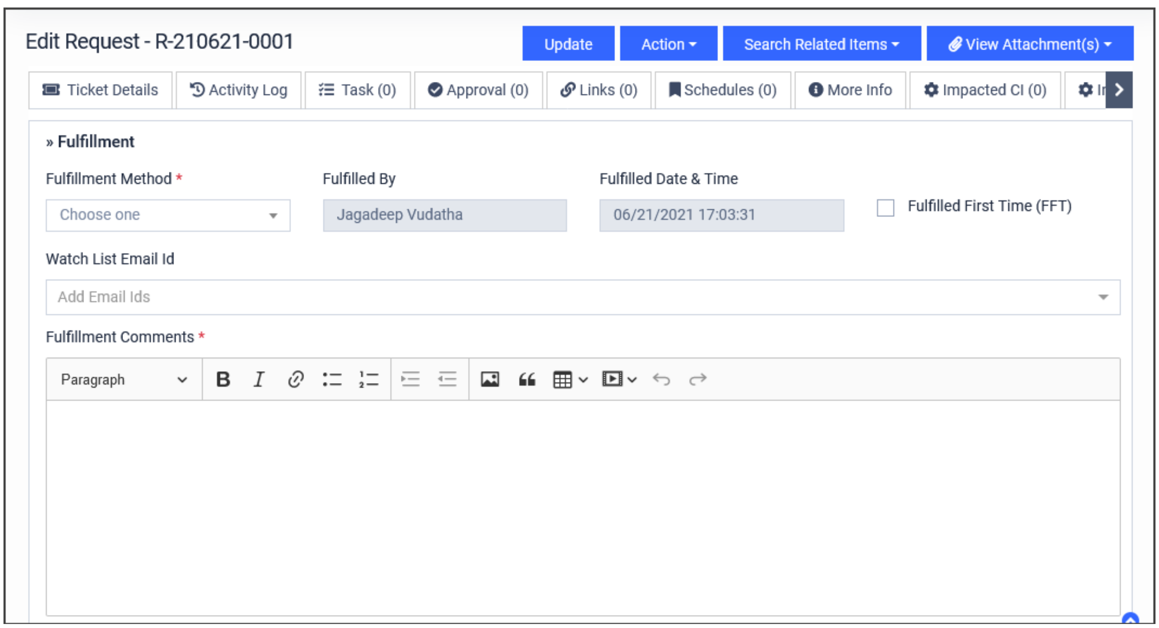


REQUEST FULFILLMENT

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

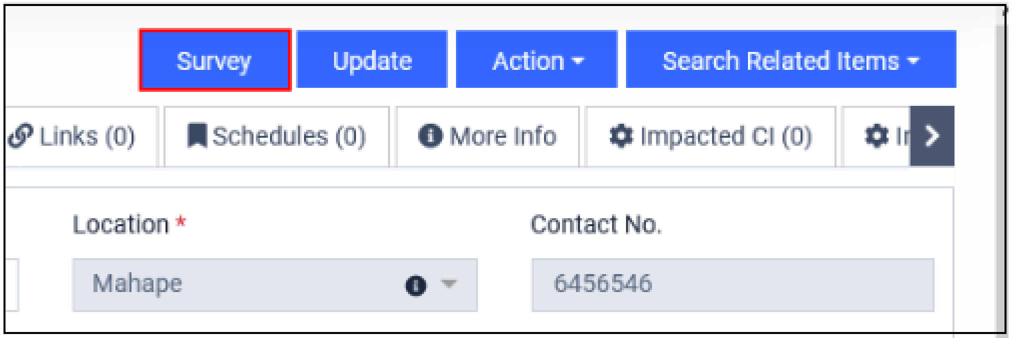
The agent need to specify **Fulfillment Method** from the dropdown. If ticket SLA is breached then it is mandatory to enter reason for SLA breach.

Enter fulfillment comments and click on update.



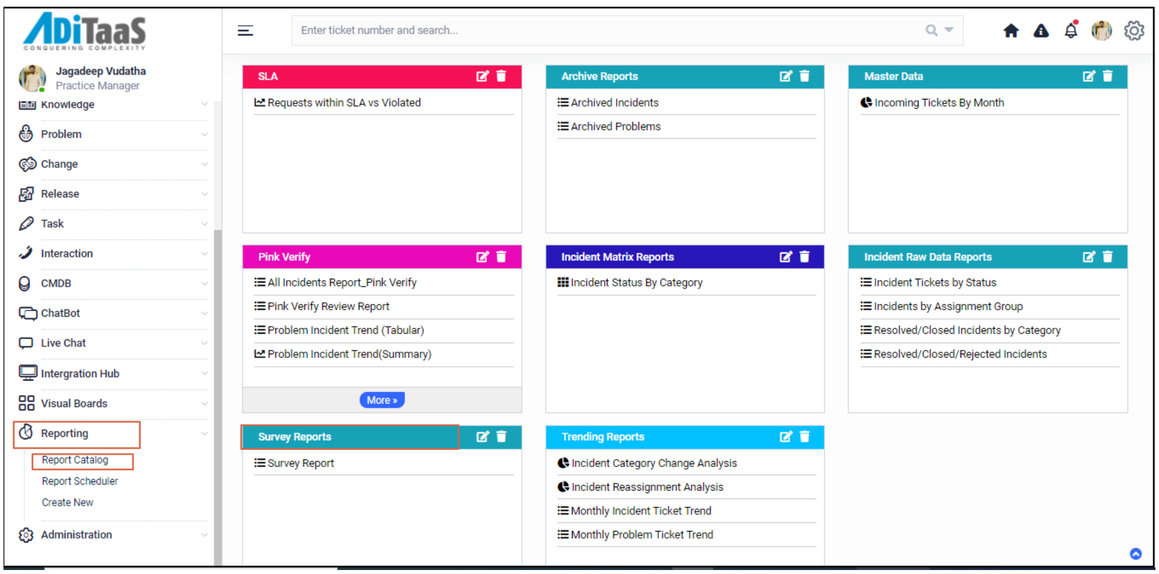
VIEW SUBMITTED SURVEY

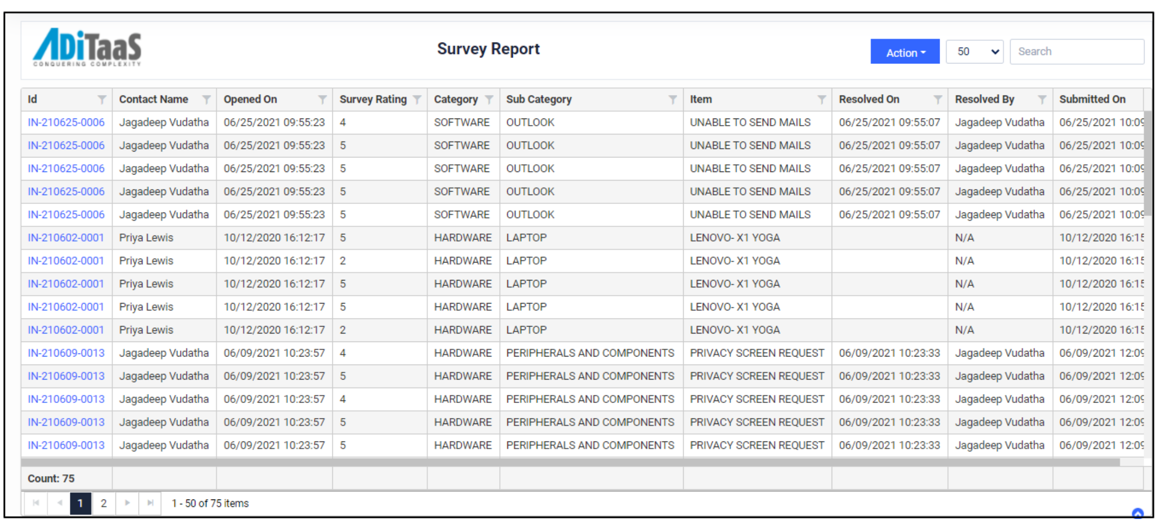
Go to respective request record and click on survey button to view the submitted survey.



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.




Survey Report

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 10:0
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 10:0
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 10:0
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 10:0
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 10:0
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	5	HARDWARE	LAPTOP	LENOVO- X1 YOGA		N/A	10/12/2020 16:1
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	2	HARDWARE	LAPTOP	LENOVO- X1 YOGA		N/A	10/12/2020 16:1
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	5	HARDWARE	LAPTOP	LENOVO- X1 YOGA		N/A	10/12/2020 16:1
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	5	HARDWARE	LAPTOP	LENOVO- X1 YOGA		N/A	10/12/2020 16:1
IN-210602-0001	Priya Lewis	10/12/2020 16:12:17	2	HARDWARE	LAPTOP	LENOVO- X1 YOGA		N/A	10/12/2020 16:1
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 12:0
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 12:0
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 12:0
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 12:0
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 12:0

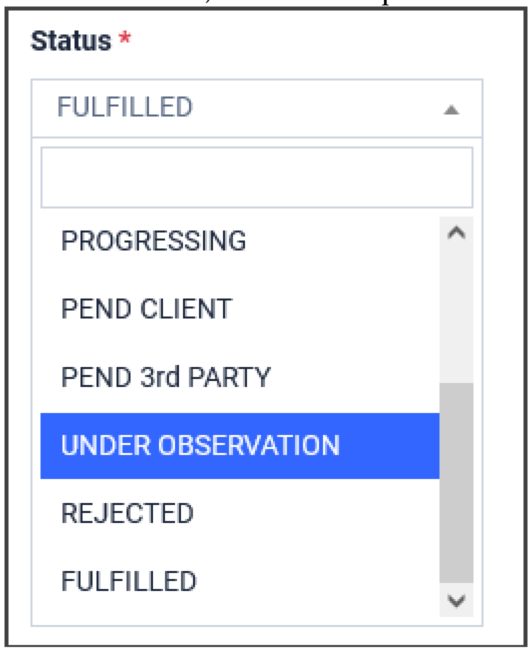
Count: 75

1 - 50 of 75 items

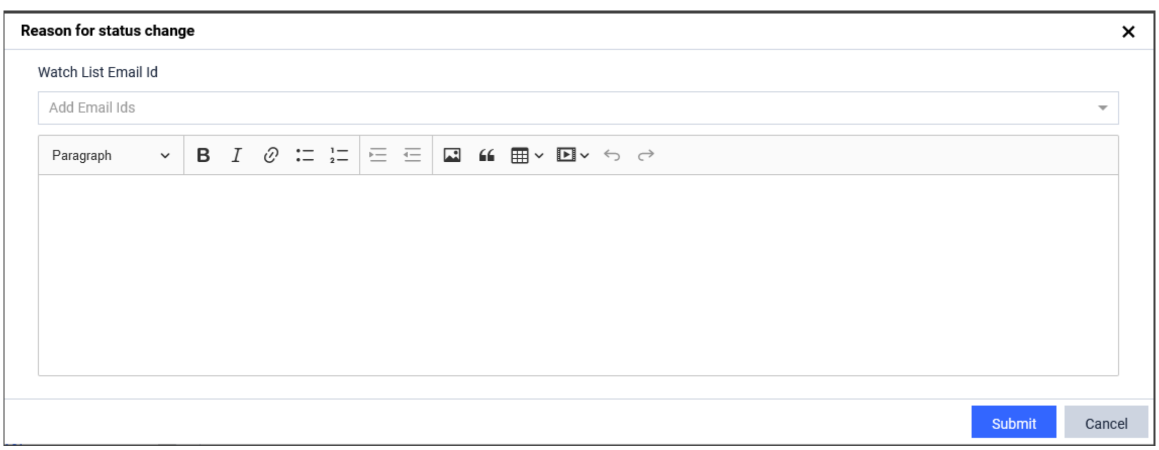
CHANGE REQUEST STATUS

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

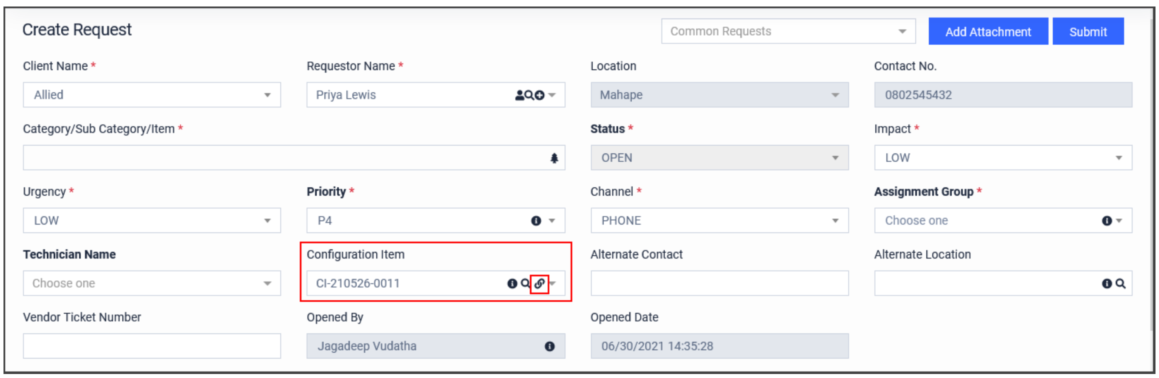
- ‘**OPEN**’: "This status is the default assignment value for all newly created request, before they are assigned to a support group or individual for action”.
- ‘**PROGRESSING**’: "Change to this status, when you begin work on the request”.
- ‘**PEND 3RDPARTY**’: "Some type of action or information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

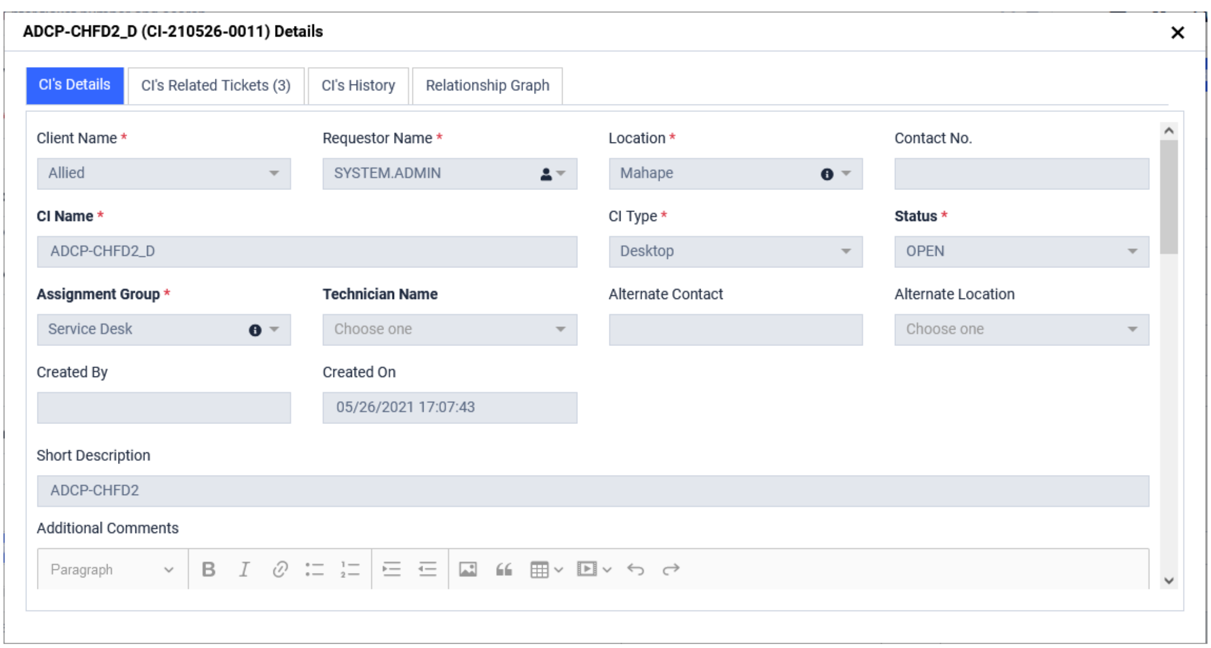
- ‘**REJECTED**’: "Change to this status if work on the request is false or duplicate record".
- ‘**UNDER OBSERVATION**’: "The request is ongoing issue and must be analyzed before further action can take place”.
- ‘**ASSIGNED**’ – “When request record is assigned to a support group or individual for 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

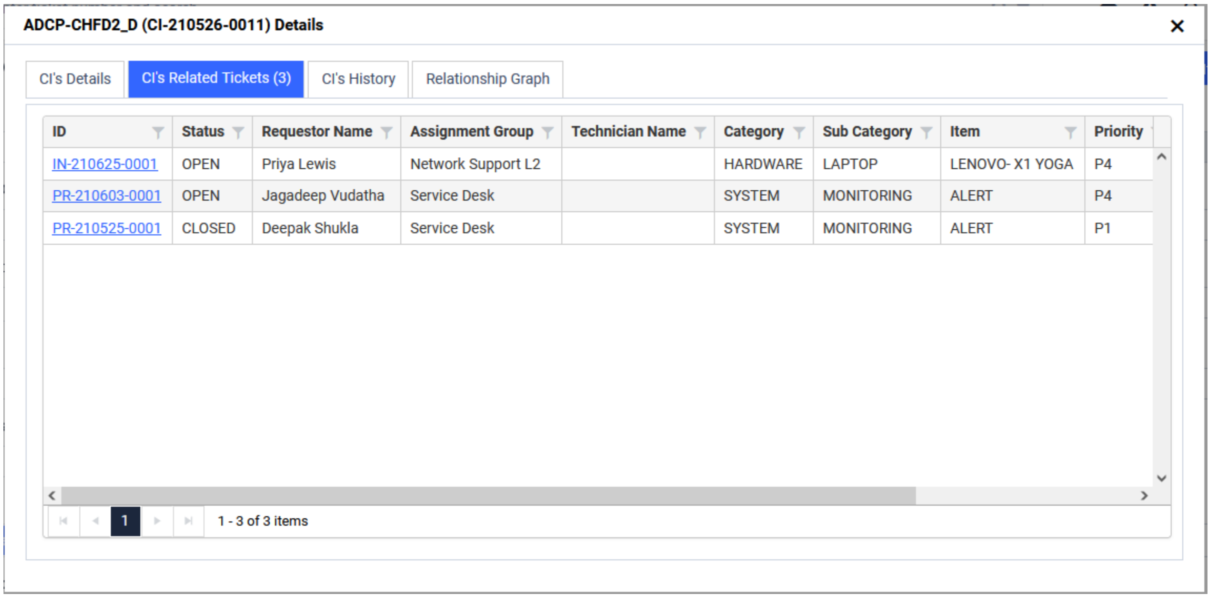
Request record can also auto close after defined period mentioned in notification rule engine

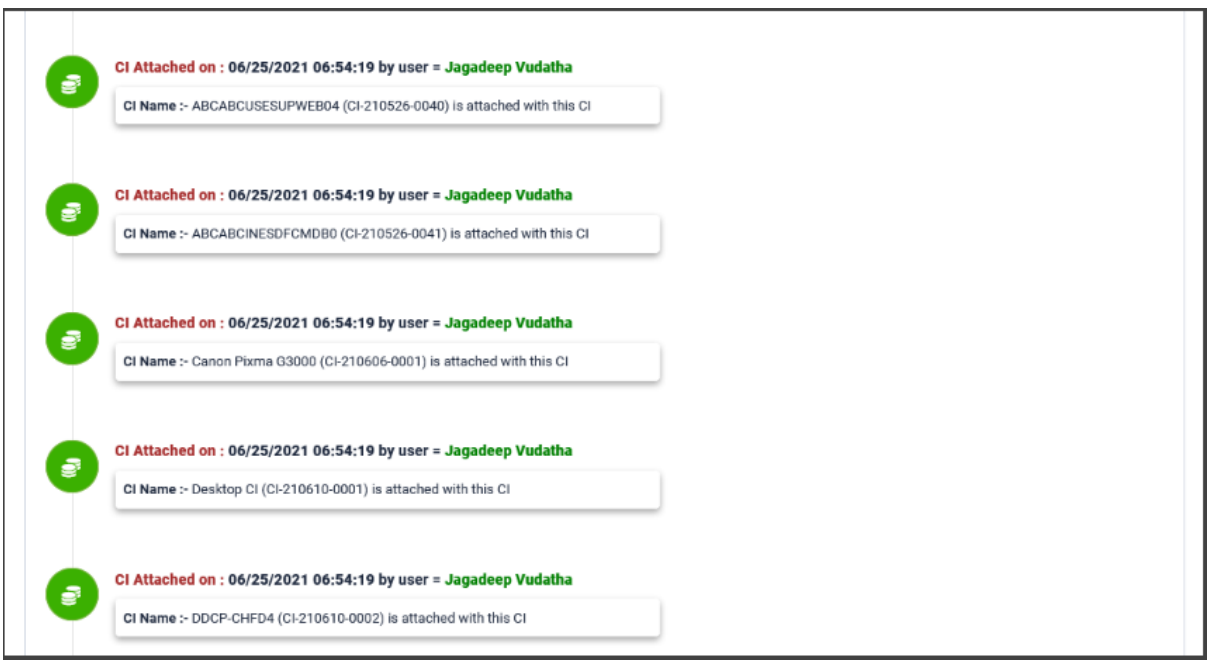
VIEW CI DETAILS FROM REQUEST PAGE

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.

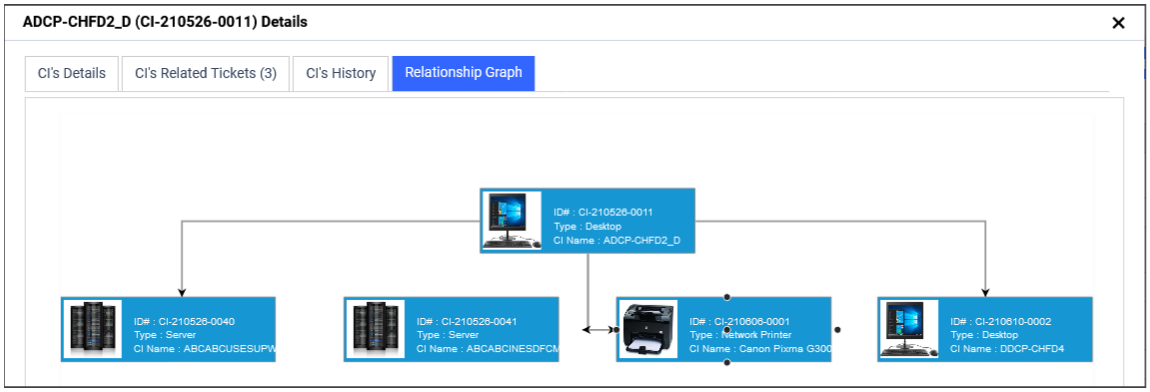


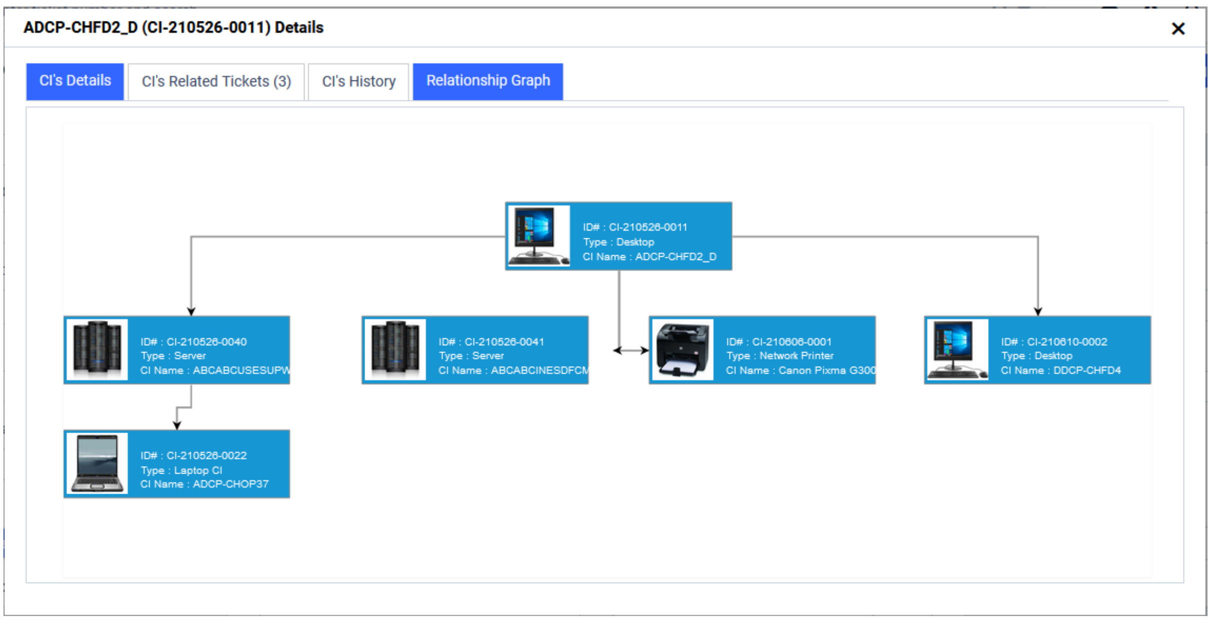



ADCP-CHFD2_D (CI-210526-0011) Details
CI's Details
CI's Related Tickets (3)
CI's History
Relationship Graph
ID | Status | Requestor Name | Assignment Group | Technician Name | Category | Sub Category | Item | Priority
IN-210625-0001 | OPEN | Priya Lewis | Network Support L2 | | HARDWARE | LAPTOP | LENOVO- X1 YOGA | P4
PR-210603-0001 | OPEN | Jagadeep Vudatha | Service Desk | | SYSTEM | MONITORING | ALERT | P4
PR-210525-0001 | 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 :- 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

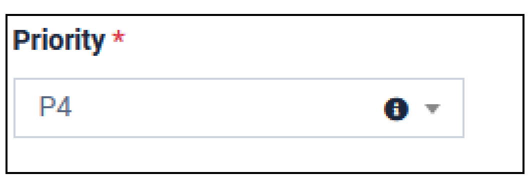

ADCP-CHFD2_D (CI-210526-0011) Details
CI's Details
CI's Related Tickets (3)
CI's History
Relationship Graph
ID# : CI-210526-0011
Type : Desktop
CI Name : ADCP-CHFD2_D

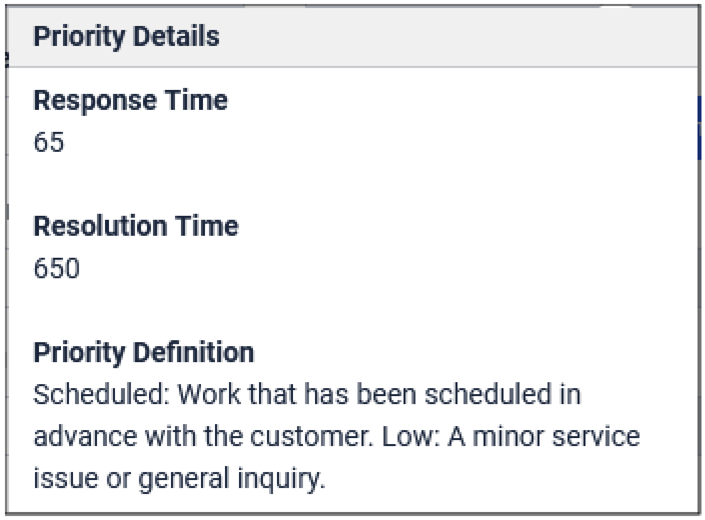




VIEW SLA INFORMATION

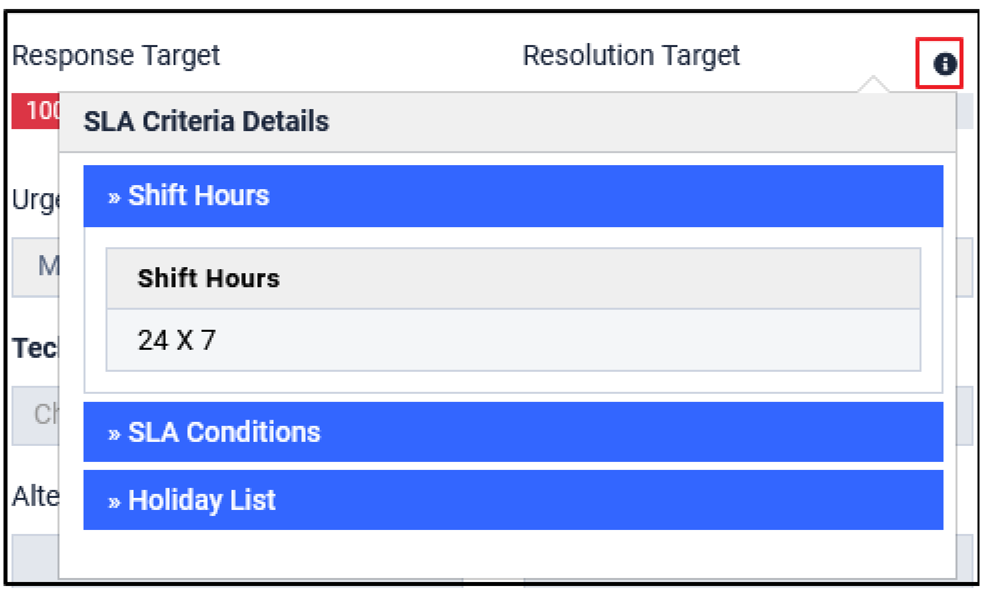
( ) icon beside the priority displays information regarding assigned Priority.



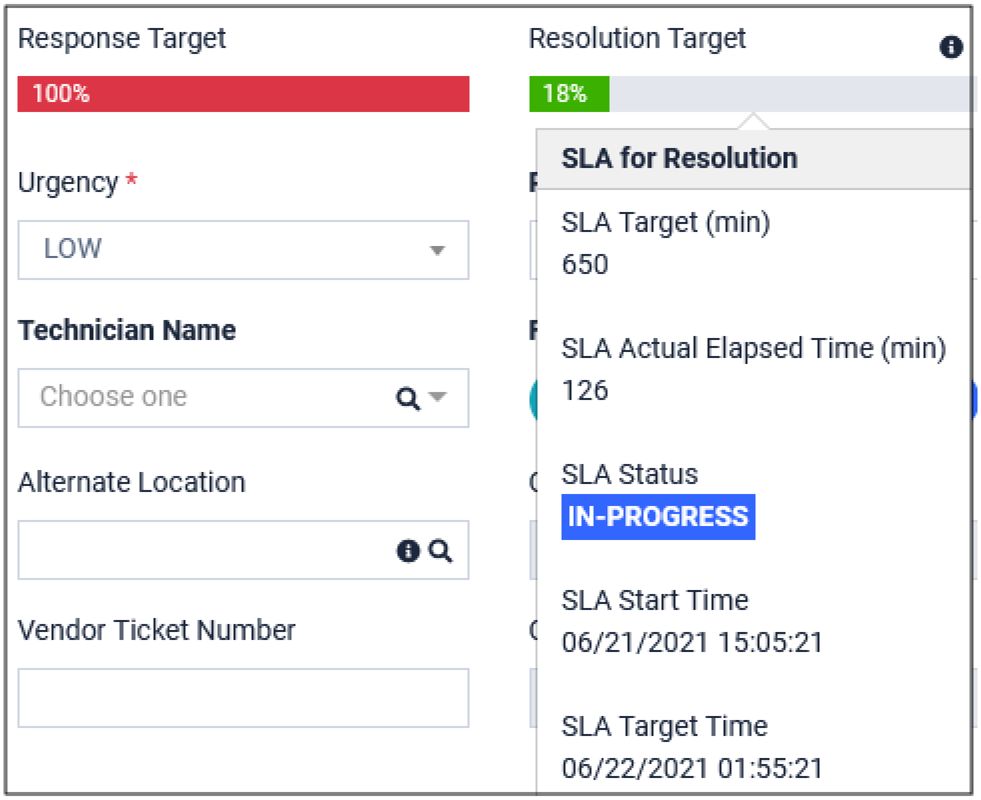


There are two graphical bar provided in tool to get a graphical view of SLA. **Response Target** and **Resolution Target** bar.

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



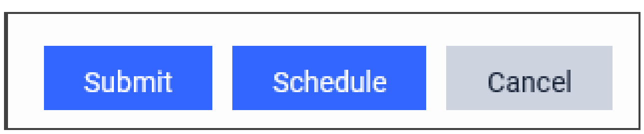
On mouse over SLA bar, SLA information displays with elapsed time and SLA status.



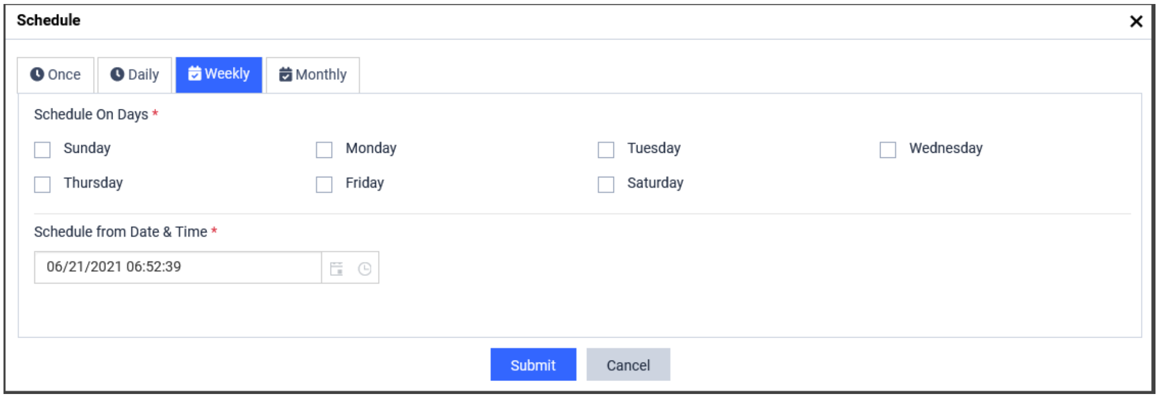
SCHEDULED REQUEST

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.

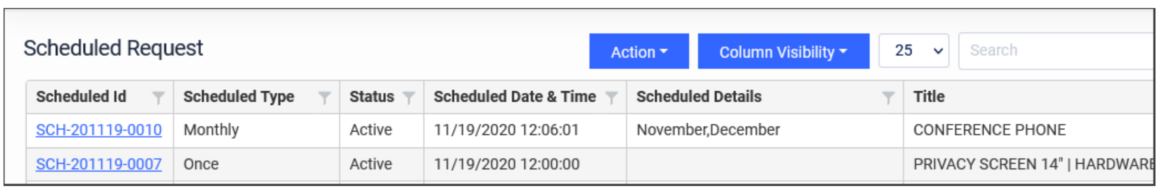


3. Displays scheduled dialog box, Select Scheduler Type, Schedule from Date & Time
4. Click on **Submit**



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
SCH-201119-0010	Monthly	Active	11/19/2020 12:06:01	November,December	CONFERENCE PHONE
SCH-201119-0007	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.

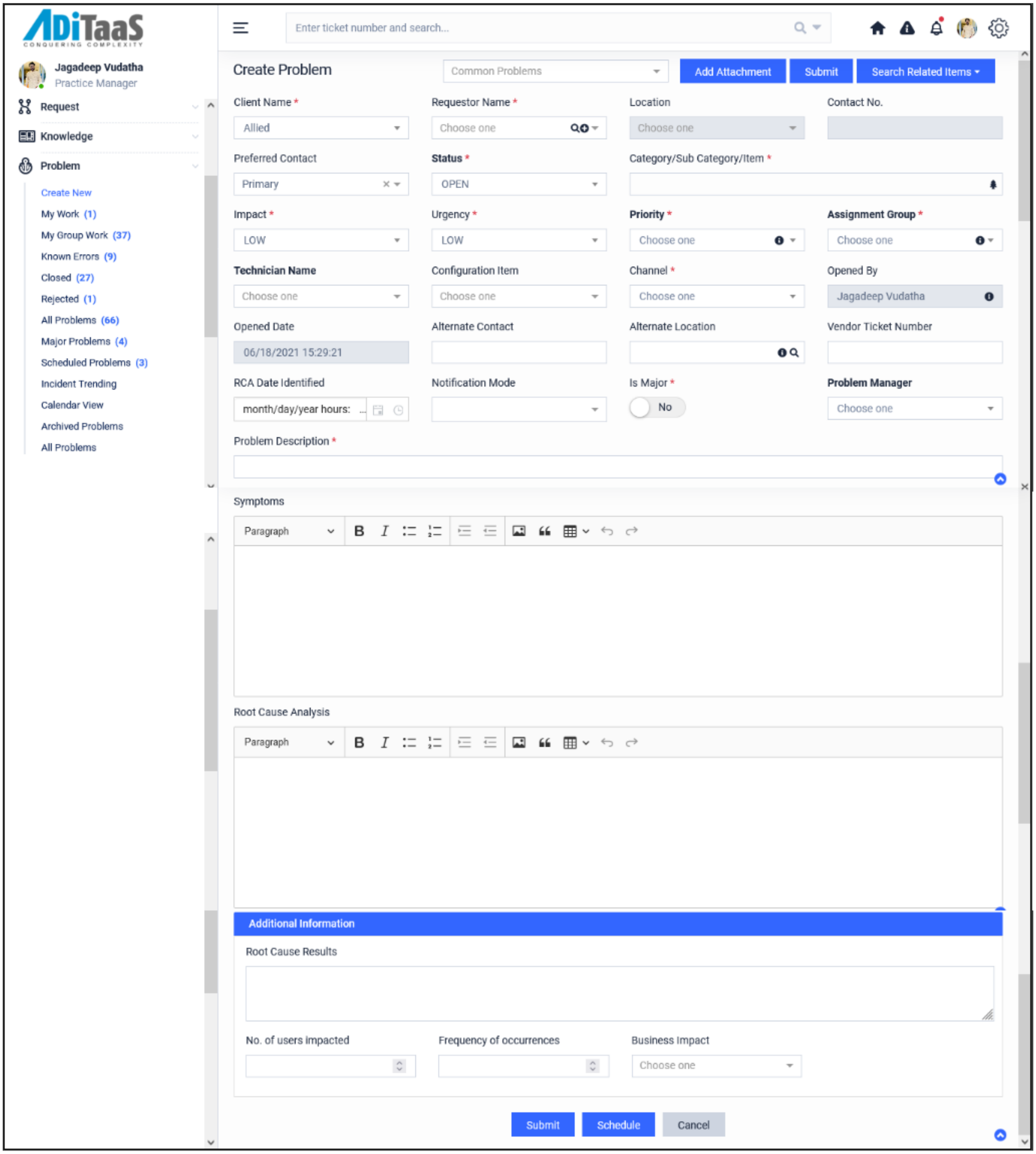
aa. **Problem Manager** – Displays list of problem manager. If problem is major problem, then Problem manager field gets mandatory.

bb. **No of users impacted-** Specify the number of users impacted.

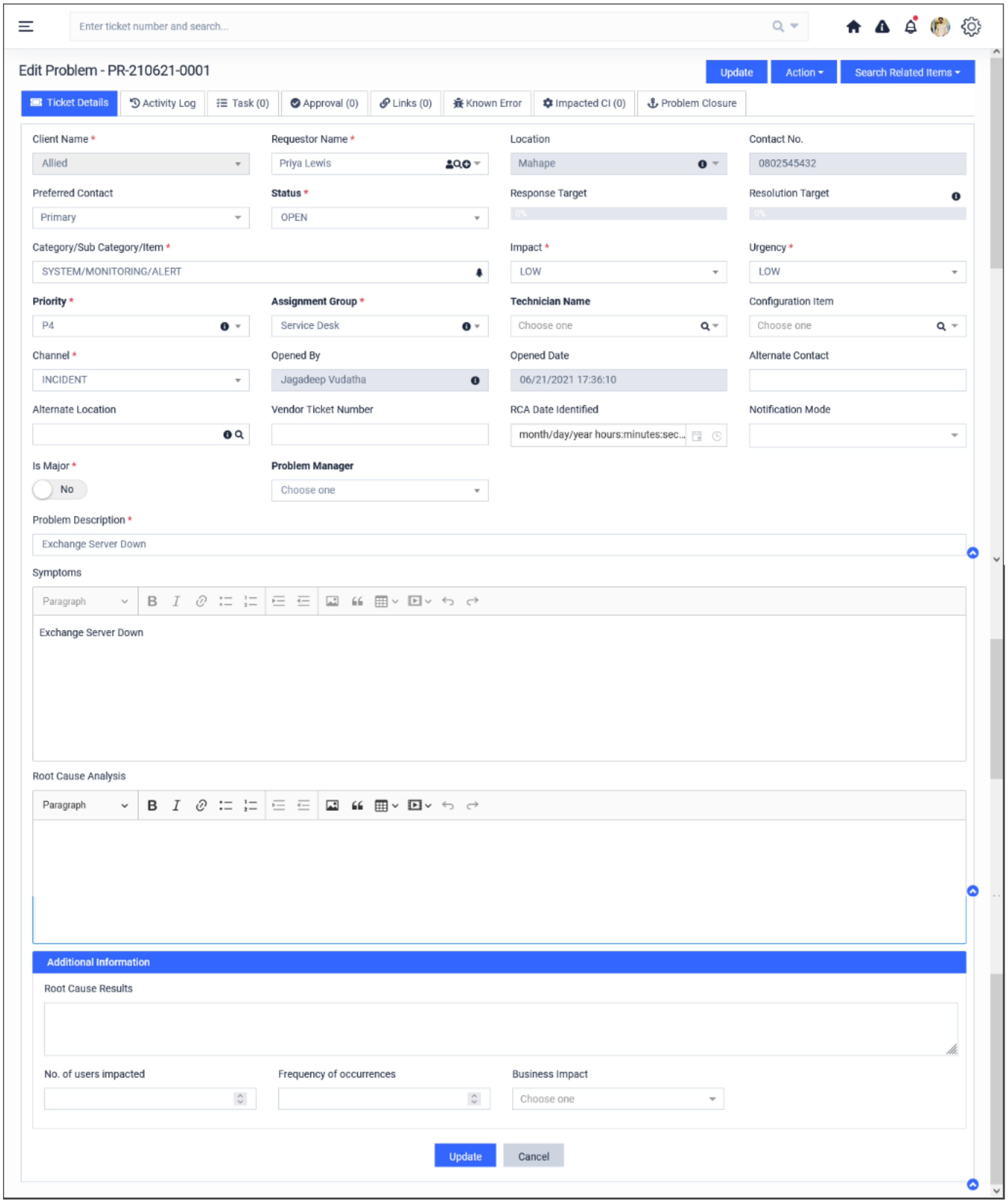
cc. **Frequency of occurrence-** Mention number of times issue has occurred.

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.



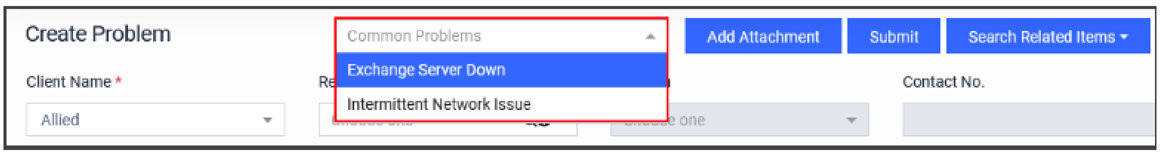
Jagadeep Vudatha
Practice Manager
Request
Knowledge
Problem
Create New
My Work (1)
My Group Work (37)
Known Errors (9)
Closed (27)
Rejected (1)
All Problems (66)
Major Problems (4)
Scheduled Problems (3)
Incident Trending
Calendar View
Archived Problems
All Problems
Enter ticket number and search...
Create Problem
Common Problems
Add Attachment
Submit
Search Related Items
Client Name *
Allied
Requestor Name *
Choose one
Location
Choose one
Contact No.
Preferred Contact
Primary
Status *
OPEN
Category/Sub Category/Item *
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 15:29:21
Alternate Contact
Alternate Location
Vendor Ticket Number
RCA Date Identified
month/day/year hours:
Notification Mode
Is Major *
No
Problem Manager
Choose one
Problem Description *
Symptoms
Paragraph
Root Cause Analysis
Paragraph
Additional Information
Root Cause Results
No. of users impacted
Frequency of occurrences
Business Impact
Choose one
Submit
Schedule
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**

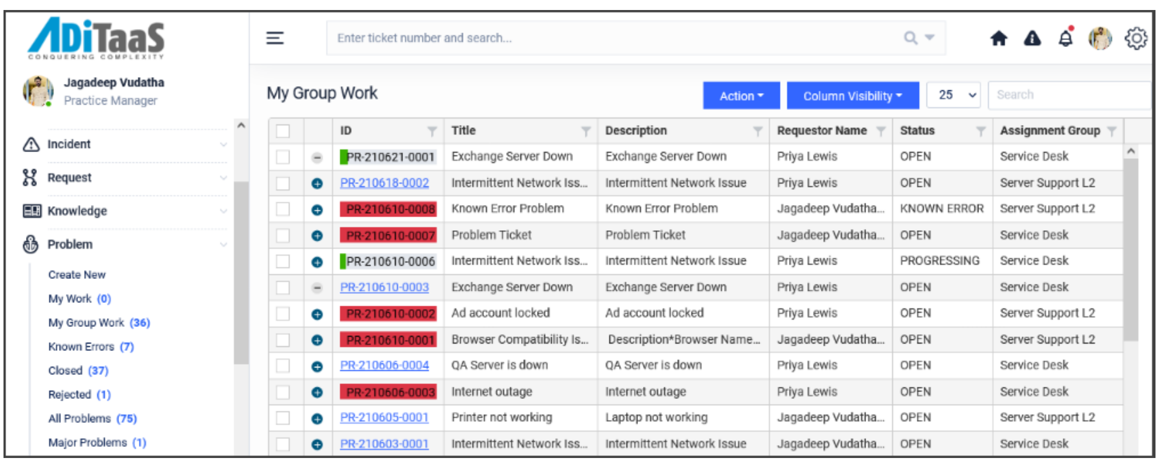


PROBLEM DATA GRIDS

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**'



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

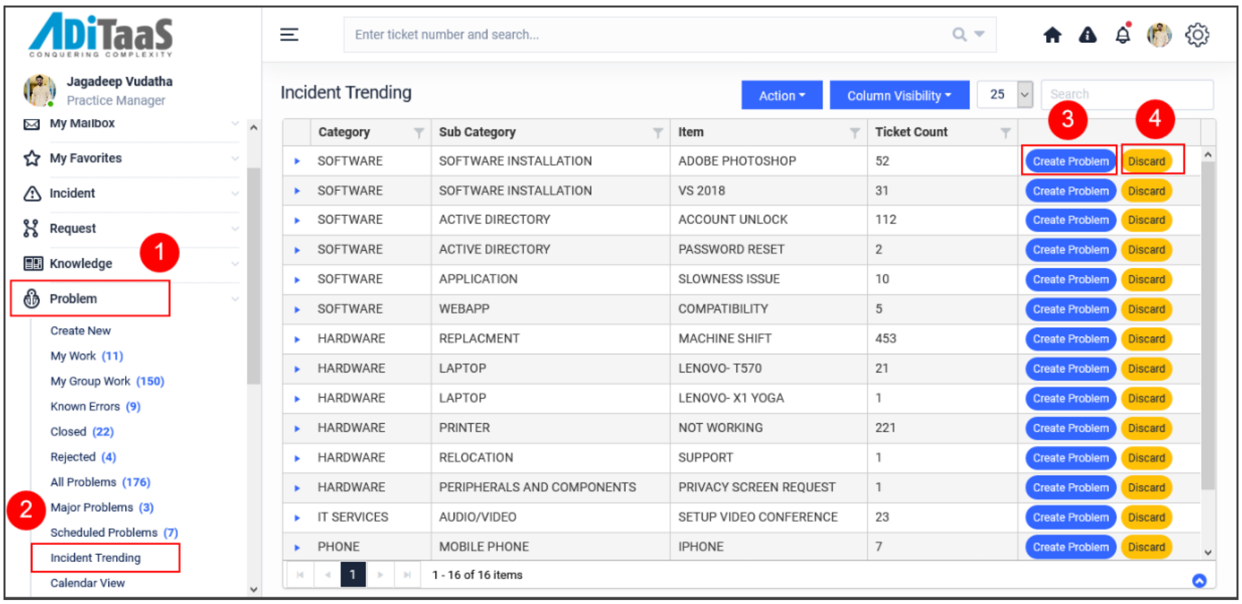
Major Problems- Displays list of all problem marked as Major problems.

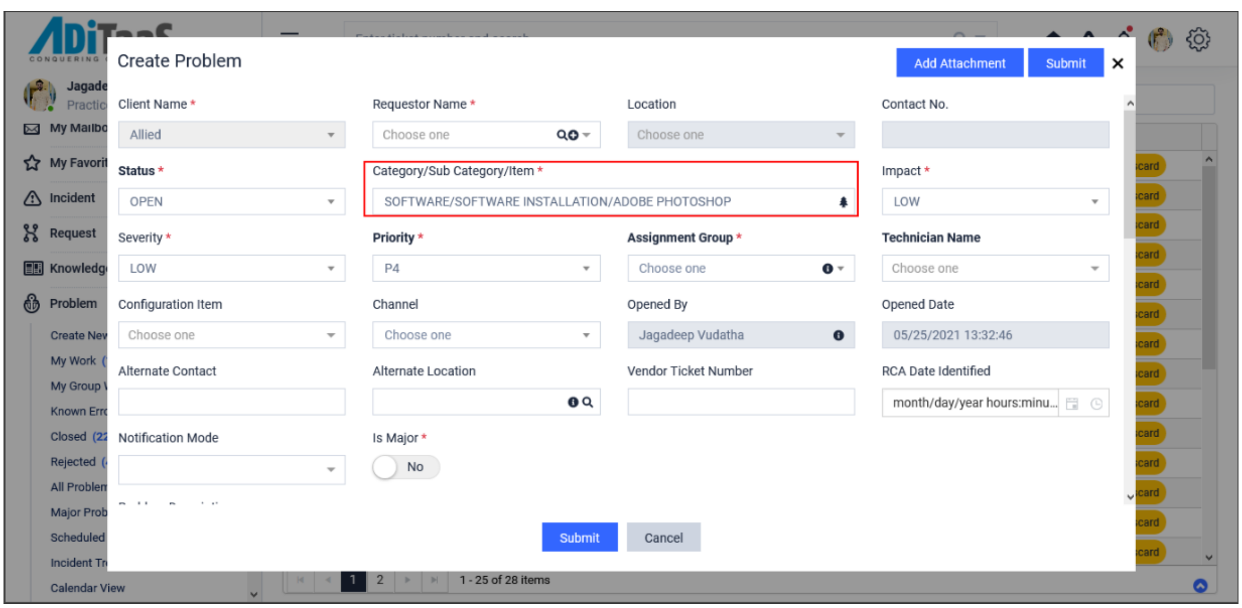
Scheduled Problems- Displays list of all scheduled problems

Incident Trending

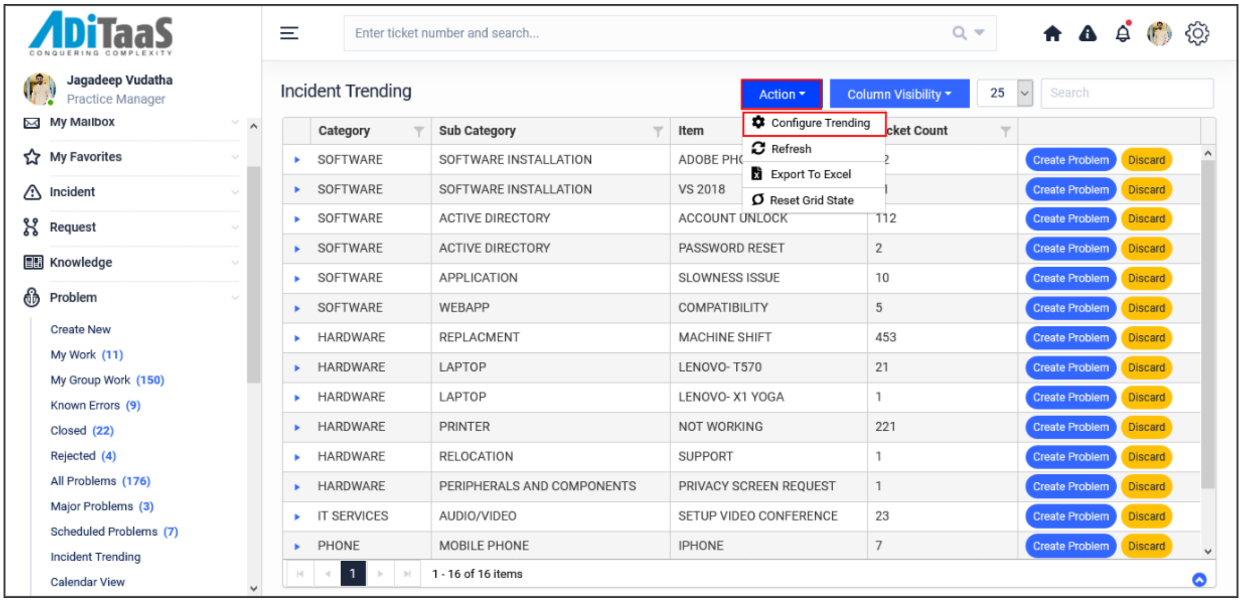
Incident Trending allow sorting by certain incident characteristics which demonstrate relatedness (such as related CI, assignment group, configuration item or configuration type).

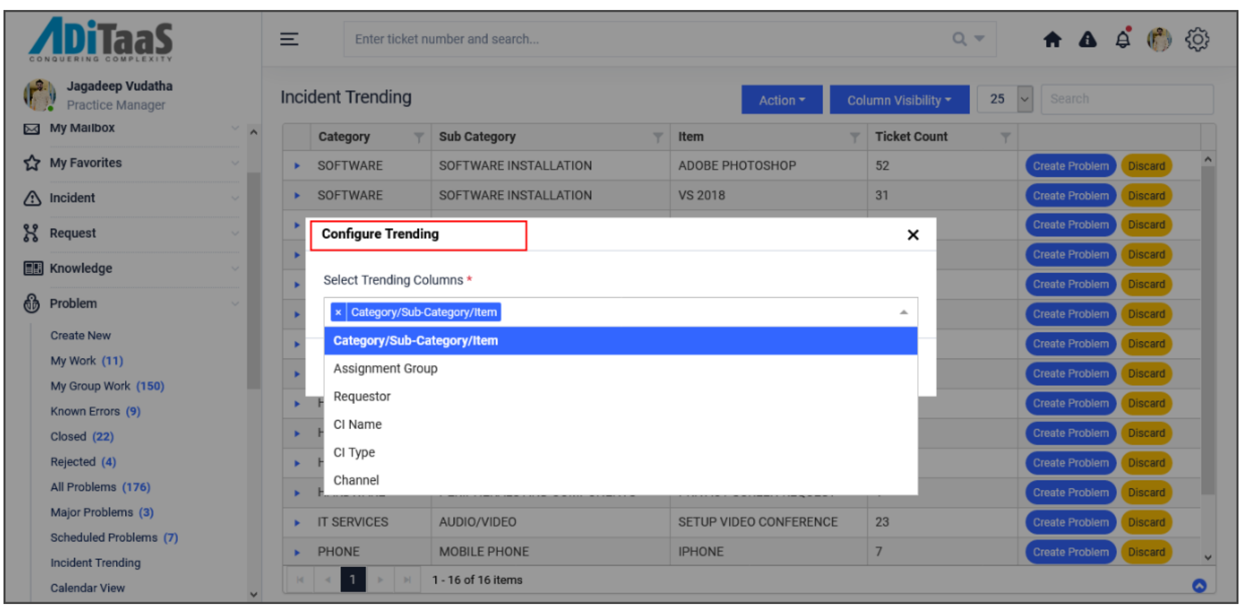
By default incidents are group by category, sub category ad item. Problem Manager can view all related tickets and click on Create Problem to pro-actively create a problem. Click on Discard to remove respective combination from the grid.

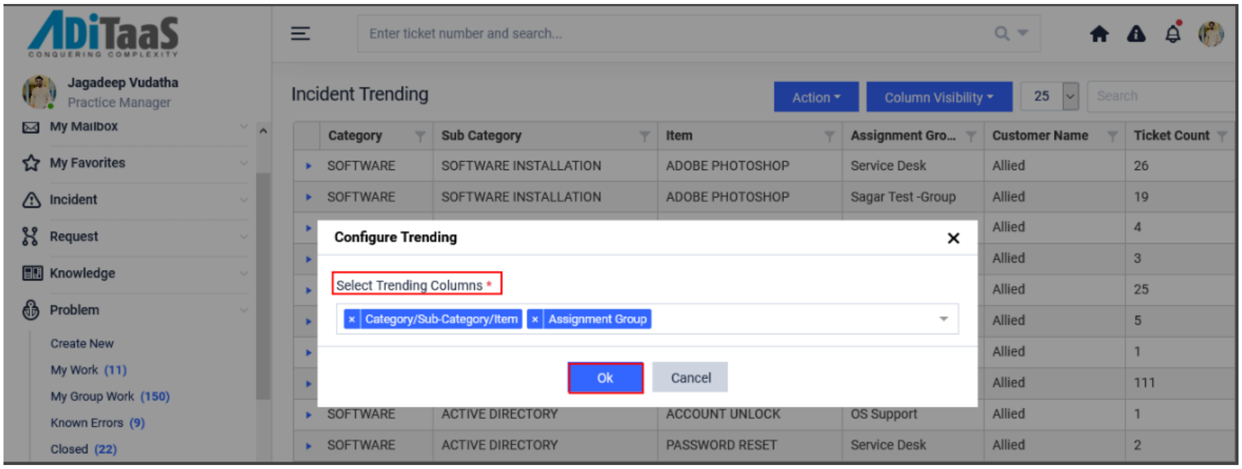




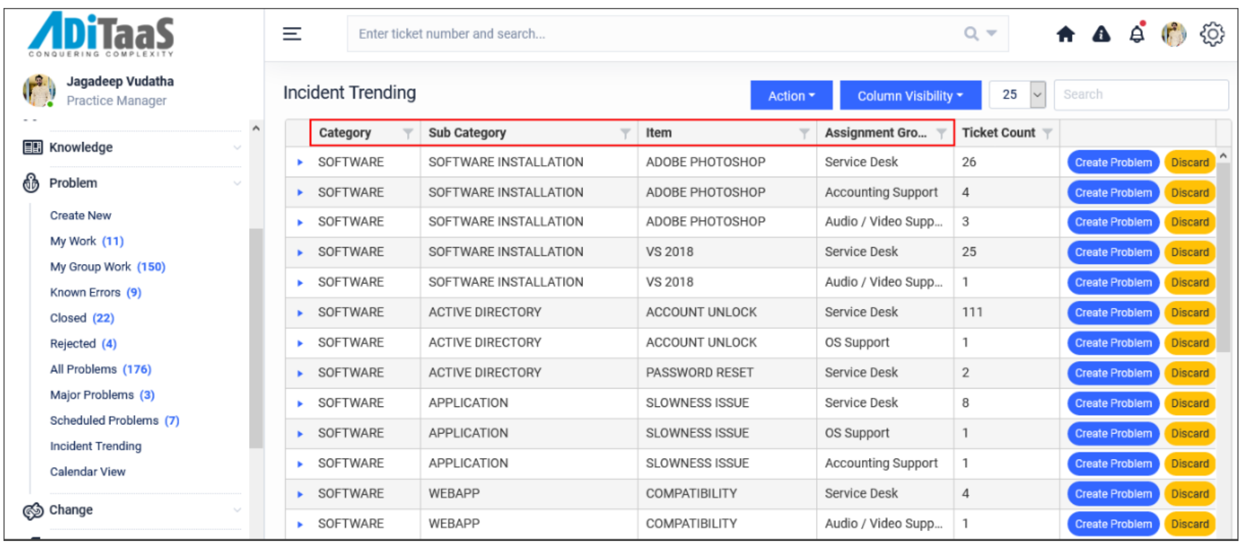
1. To configure dynamic trending list, click on **Action → Configure Trending**
2. Select require column names
3. Click on Ok



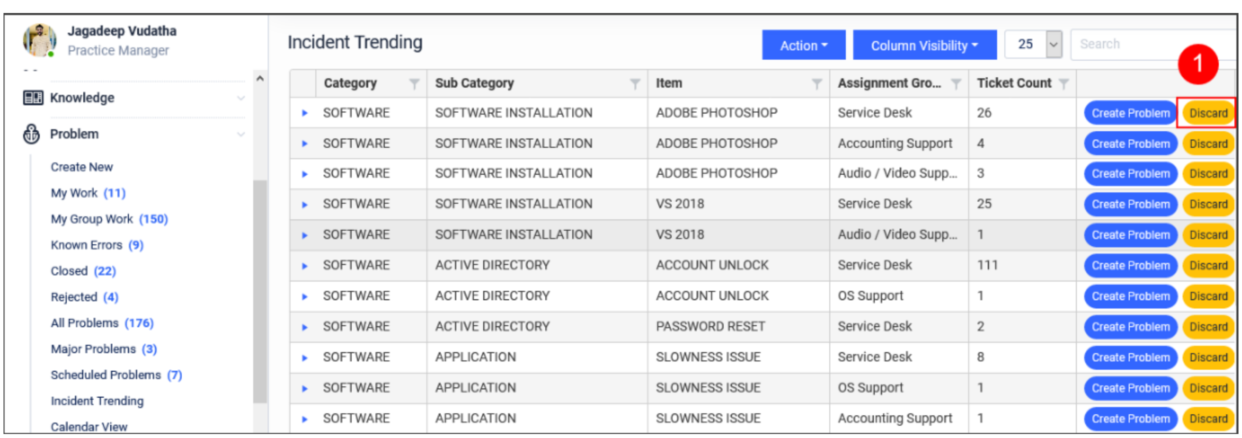


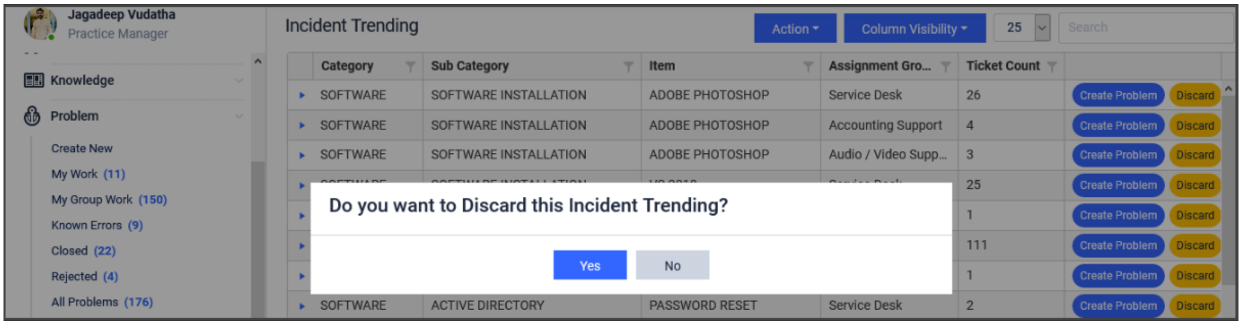


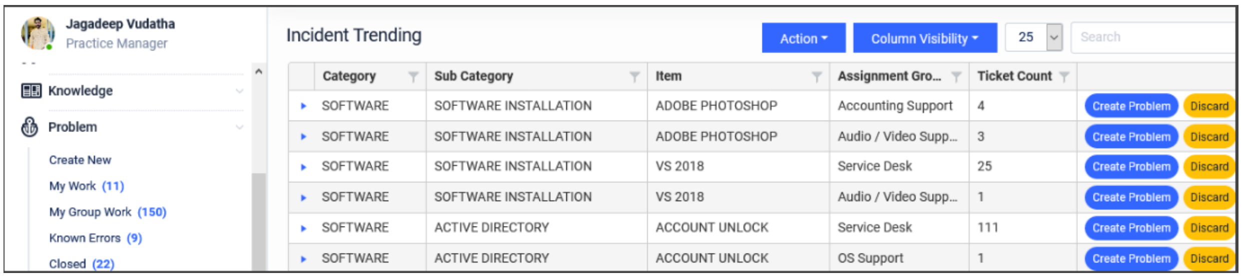
New trending list will be generated dynamically.



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.





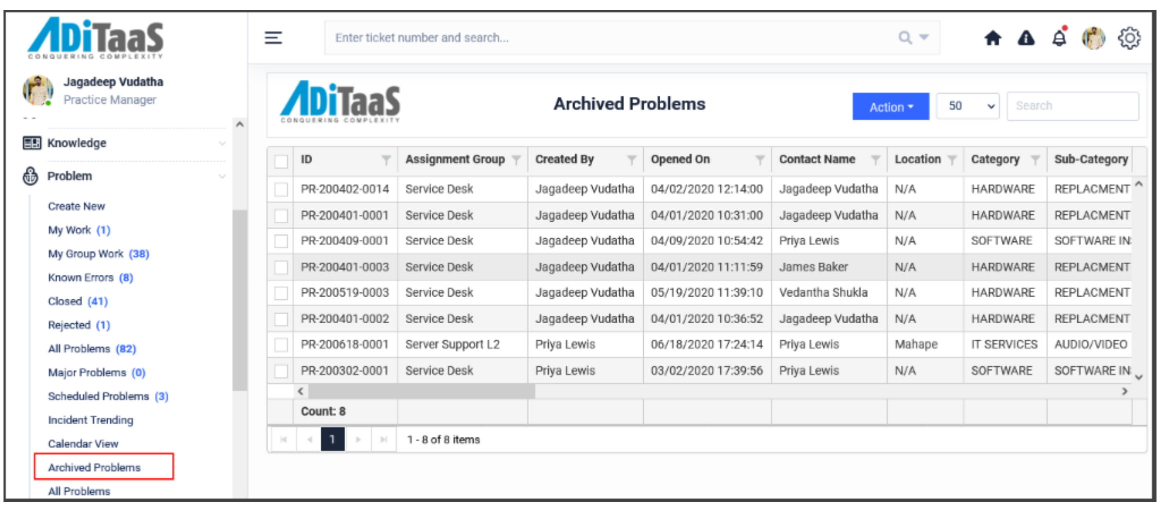


Calendar View- Displays scheduled problems, set reminders on calendar view.

Archived Problems- Displays all archived Problems

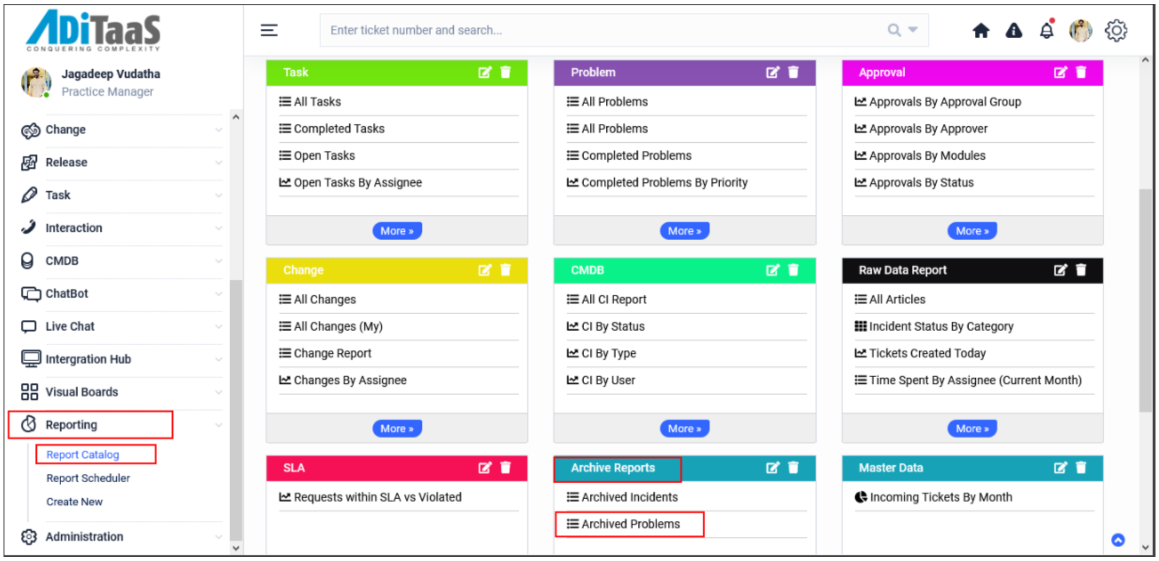
View Archived Problems

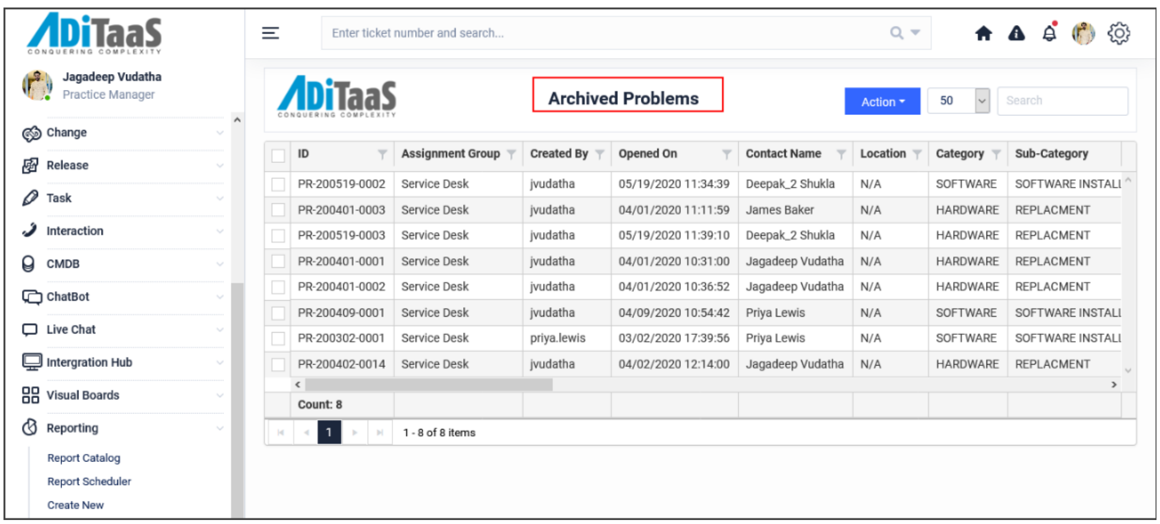
1. Navigate to Problem module from left menu bar
2. Click on Archived Problems



View Archived Problems Report

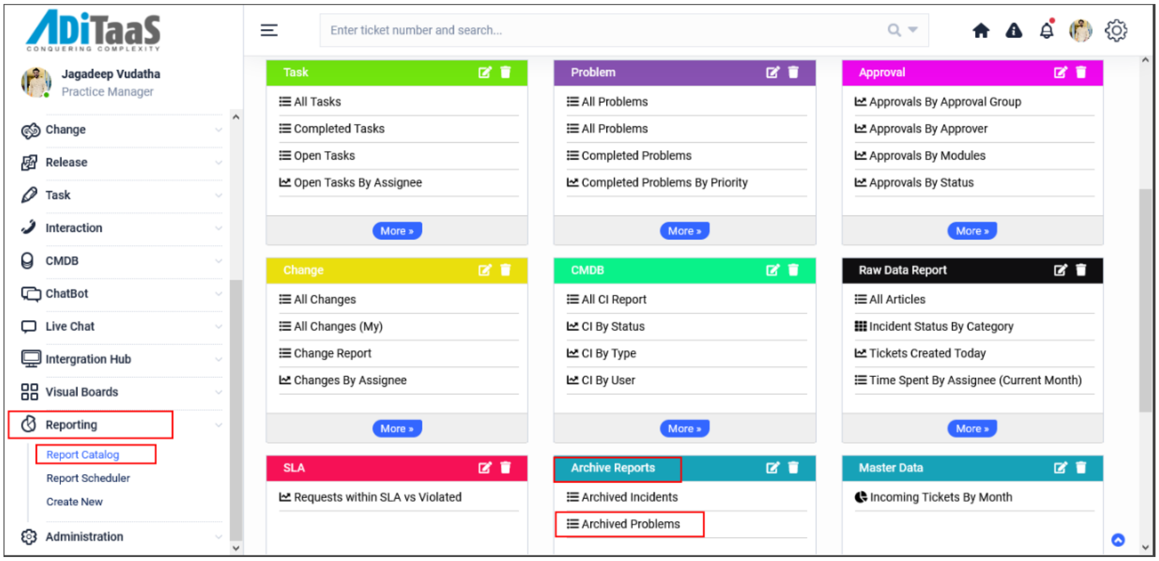
1. Navigate to Reporting module from left menu bar
2. Click on Report Catalog
3. Move to Archived Reports Widgets
4. Select Archived Problem Report to view all archived Problem records

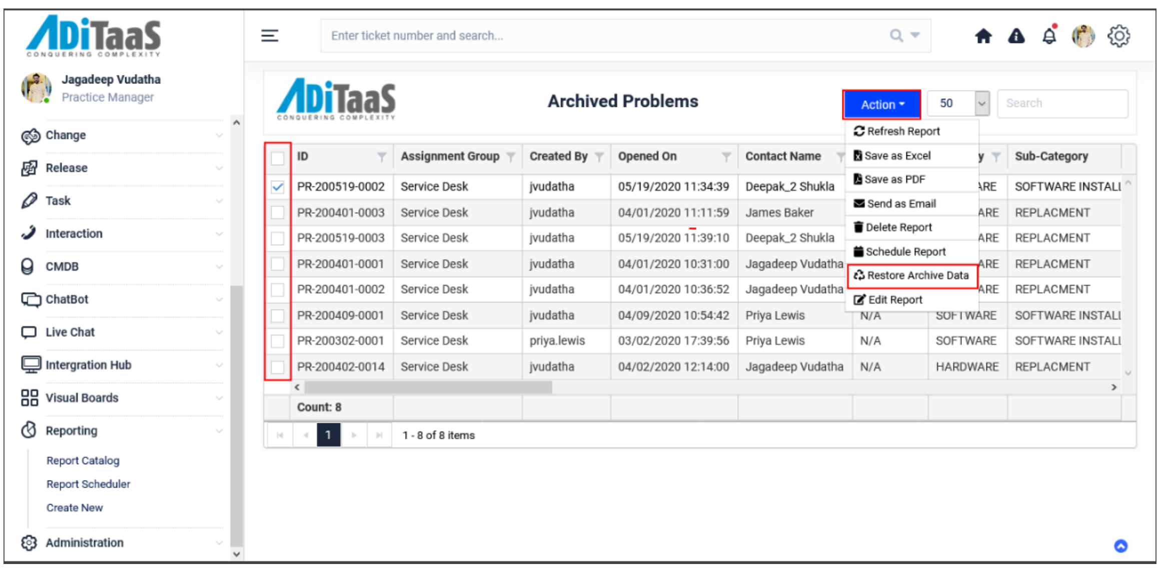


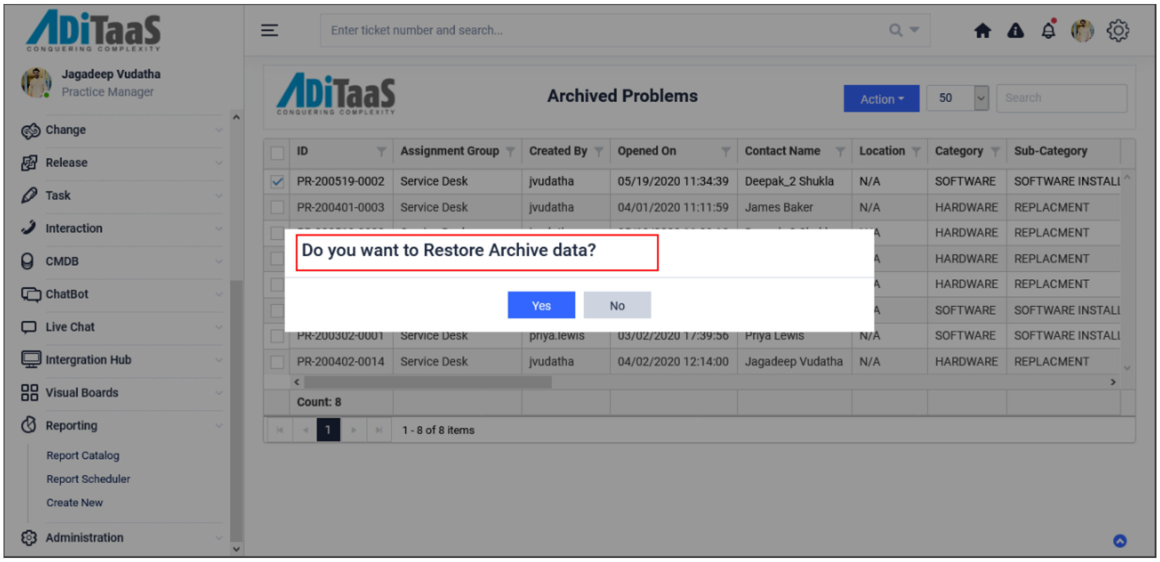


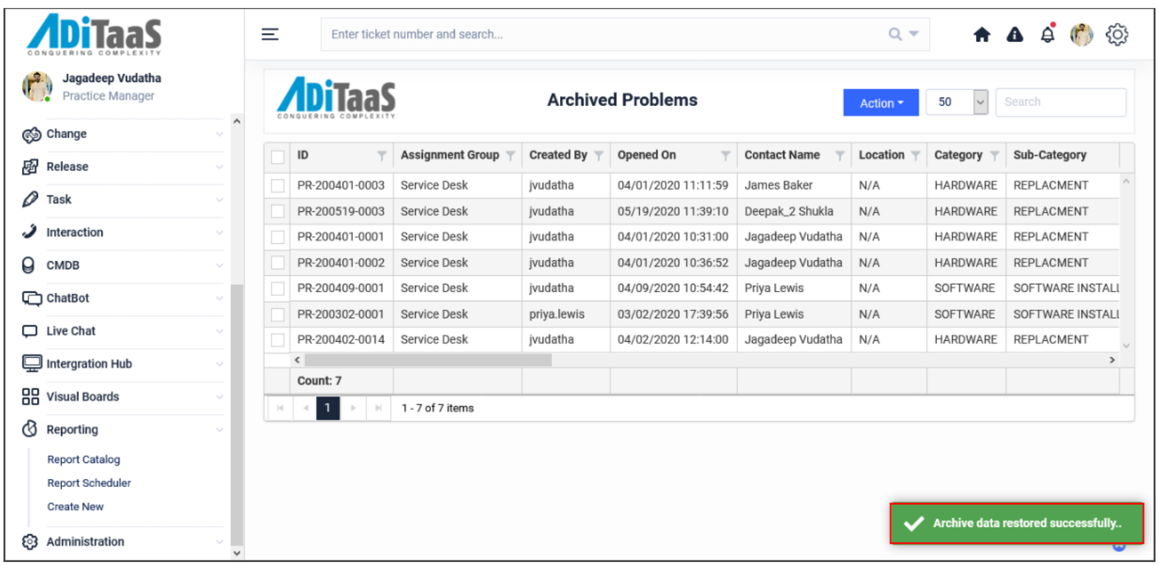
Restore Archived Records-

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


ADiTaaS
Enter ticket number and search...
Jagadeep Vudatha
Practice Manager
Change
Release
Task
Interaction
CMDB
ChatBot
Live Chat
Intergration Hub
Visual Boards
Reporting
Report Catalog
Report Scheduler
Create New
Administration
Task
All Tasks
Completed Tasks
Open Tasks
Open Tasks By Assignee
More »
Problem
All Problems
All Problems
Completed Problems
Completed Problems By Priority
More »
Approval
Approvals By Approval Group
Approvals By Approver
Approvals By Modules
Approvals By Status
More »
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
All Articles
Incident Status By Category
Tickets Created Today
Time Spent By Assignee (Current Month)
More »
SLA
Requests within SLA vs Violated
Archive Reports
Archived Incidents
Archived Problems
Master Data
Incoming Tickets By Month


ADiTaaS
Enter ticket number and search...
Jagadeep Vudatha
Practice Manager
Change
Release
Task
Interaction
CMDB
ChatBot
Live Chat
Intergration Hub
Visual Boards
Reporting
Report Catalog
Report Scheduler
Create New
Administration
Archived Problems
Action
50
Search
Refresh Report
Save as Excel
Save as PDF
Send as Email
Delete Report
Schedule Report
Restore Archive Data
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 INSTALL
PR-200401-0003 Service Desk jvudatha 04/01/2020 11:11:59 James Baker REPLACMENT
PR-200519-0003 Service Desk jvudatha 05/19/2020 11:39:10 Deepak_2 Shukla REPLACMENT
PR-200401-0001 Service Desk jvudatha 04/01/2020 10:31:00 Jagadeep Vudatha REPLACMENT
PR-200401-0002 Service Desk jvudatha 04/01/2020 10:36:52 Jagadeep Vudatha REPLACMENT
PR-200409-0001 Service Desk jvudatha 04/09/2020 10:54:42 Priya Lewis N/A SOFTWARE SOFTWARE INSTALL
PR-200302-0001 Service Desk priya.lewis 03/02/2020 17:39:56 Priya Lewis N/A SOFTWARE SOFTWARE INSTALL
PR-200402-0014 Service Desk jvudatha 04/02/2020 12:14:00 Jagadeep Vudatha N/A HARDWARE REPLACMENT
Count: 8
1
1 - 8 of 8 items





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

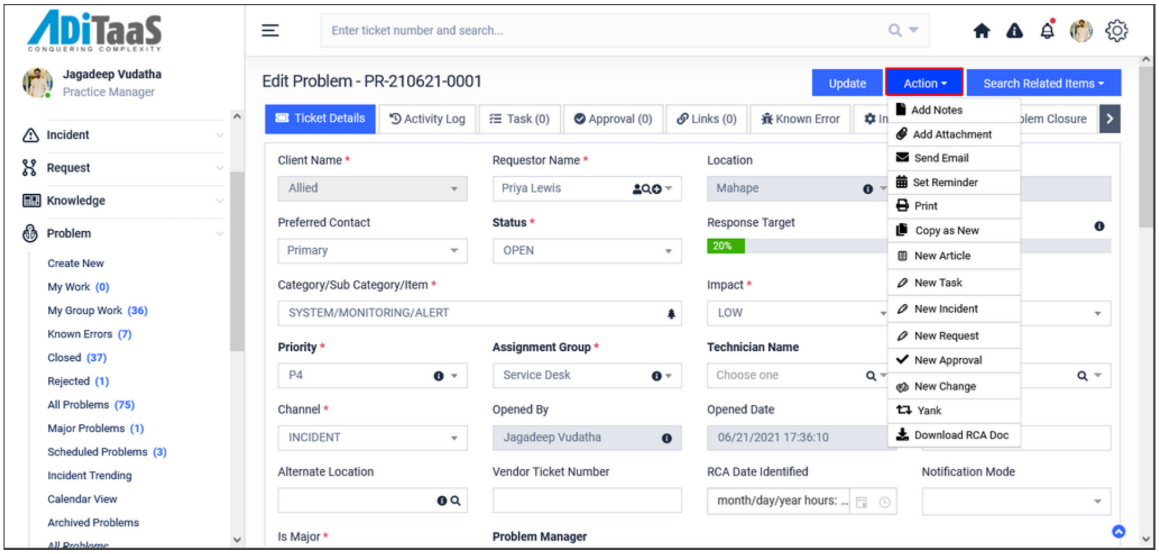
Restored records will be removed from Archived report and available on Active list.

All Problems- Displays all list of Problems records.

EDIT/ UPDATE PROBLEM

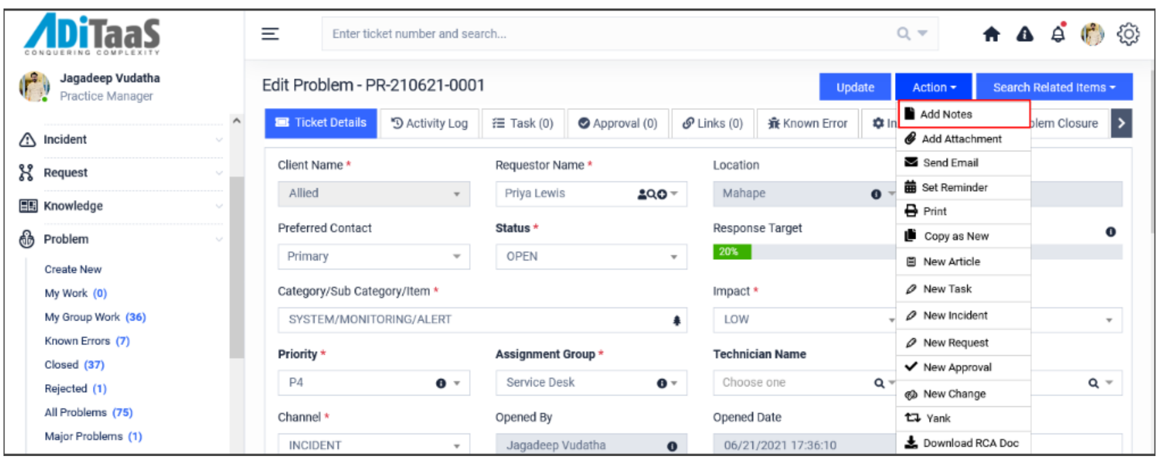
On successful creation of ticket, system will generate unique ticket id. Ticket id starts with date and number. **PR** indicates Problem ticket.

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.

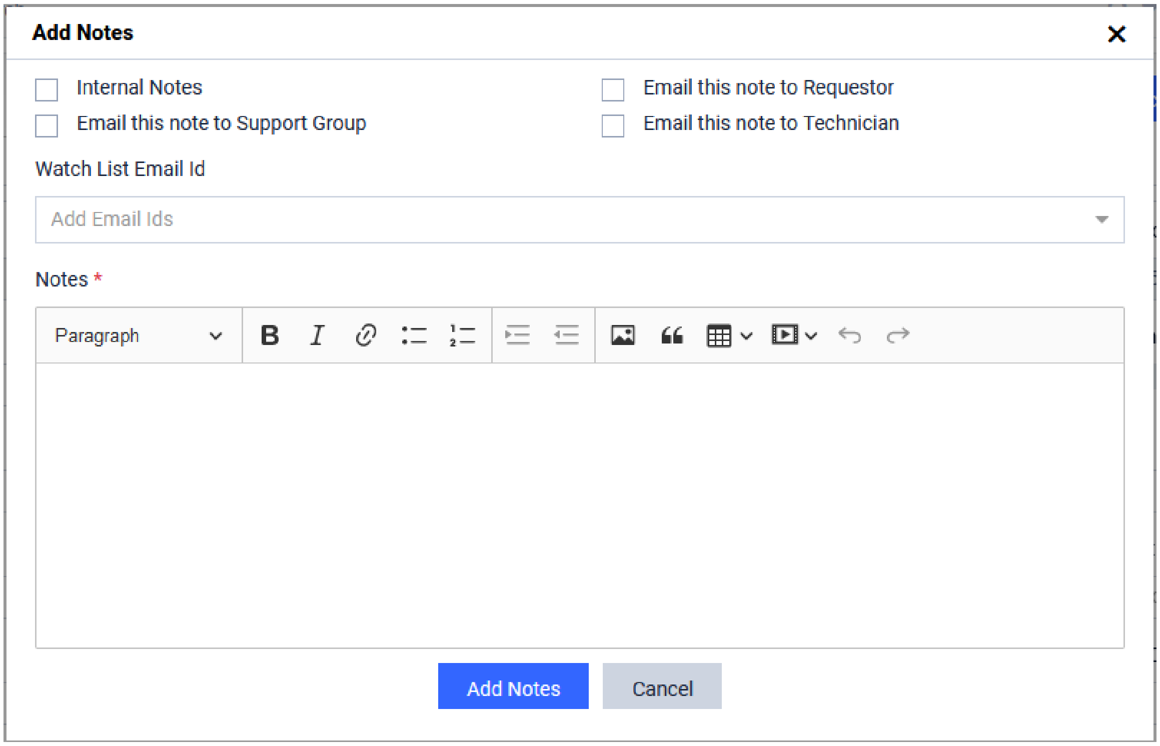


ADD NOTES

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

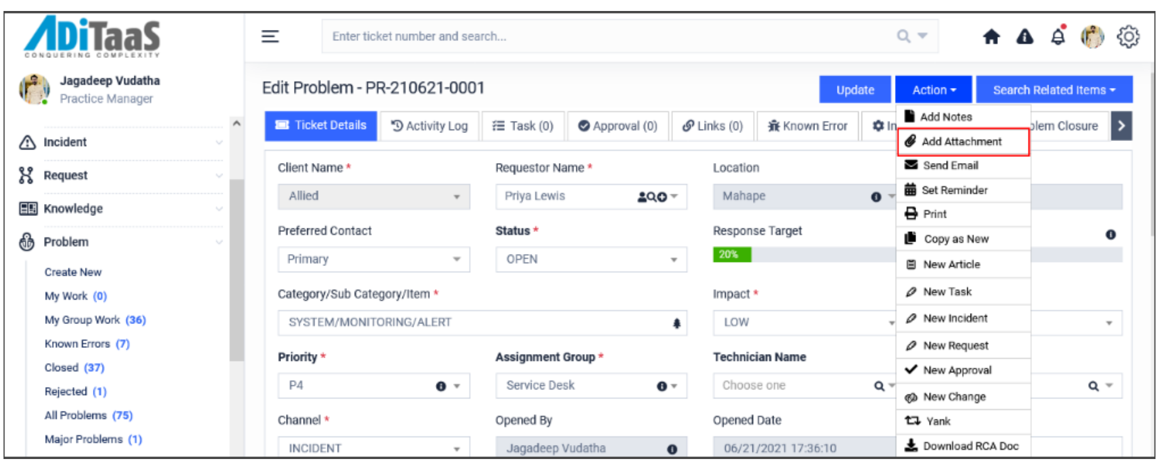


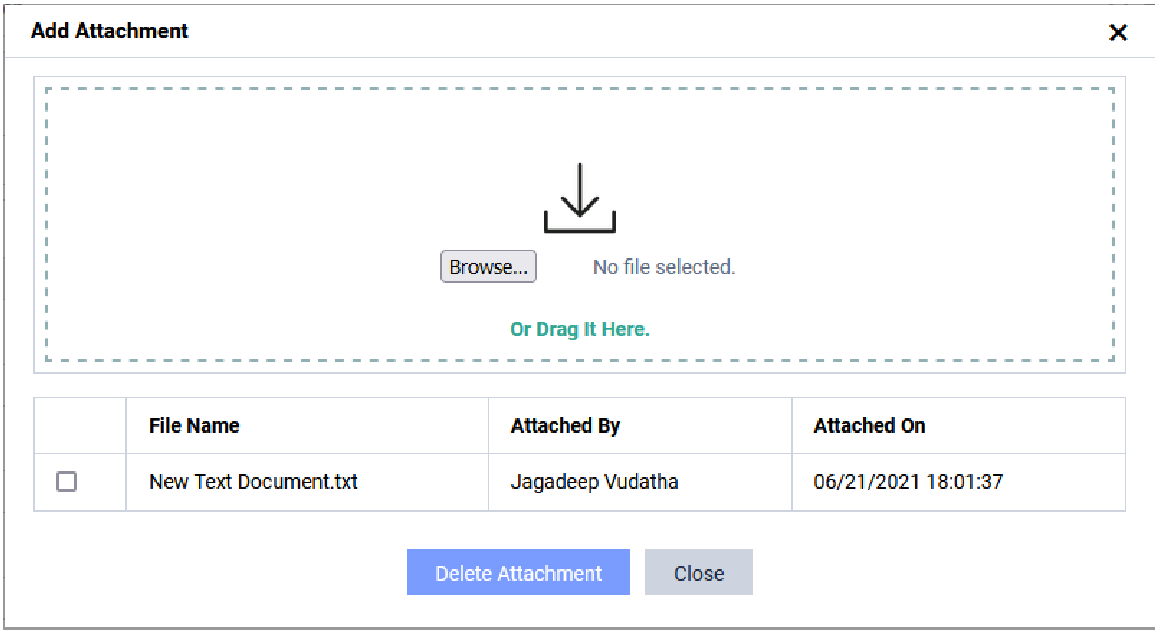
3. Click on checkbox to select required action items available on notes window
   i. **Internal Notes:** Notes will be visible only agents. By default added notes will be visible for both agents and end users.
   ii. **Email this note to technician:** Email notification will be sent to assigned technician 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 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.

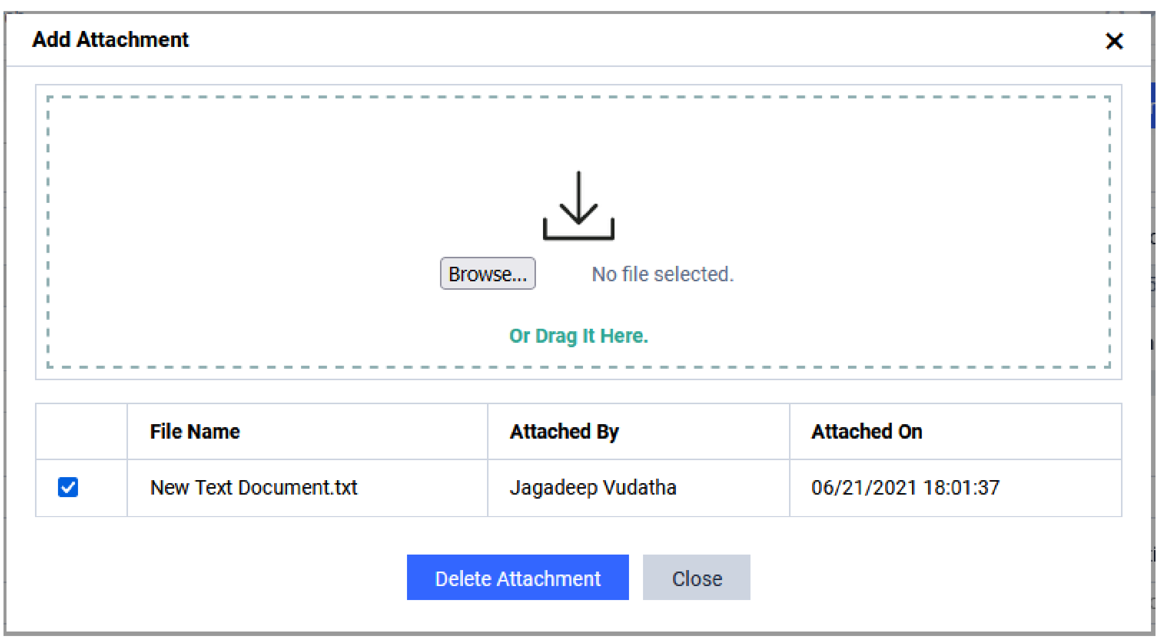




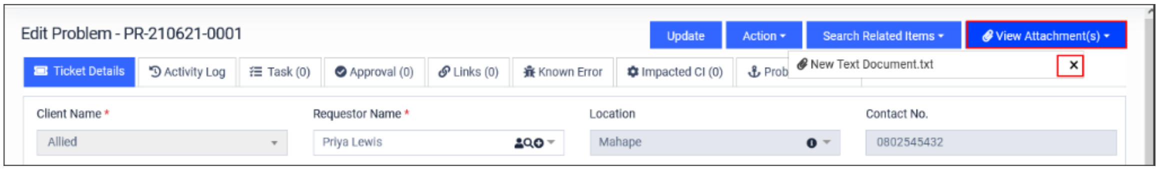
All Uploaded attachments will be visible Under '**View Attachment**' tab.

Delete/ Remove Attachment:

To remove an attachment, click on respective attached attachment from the "**Add Attachment**" window and click on '**Delete Attachment**'.

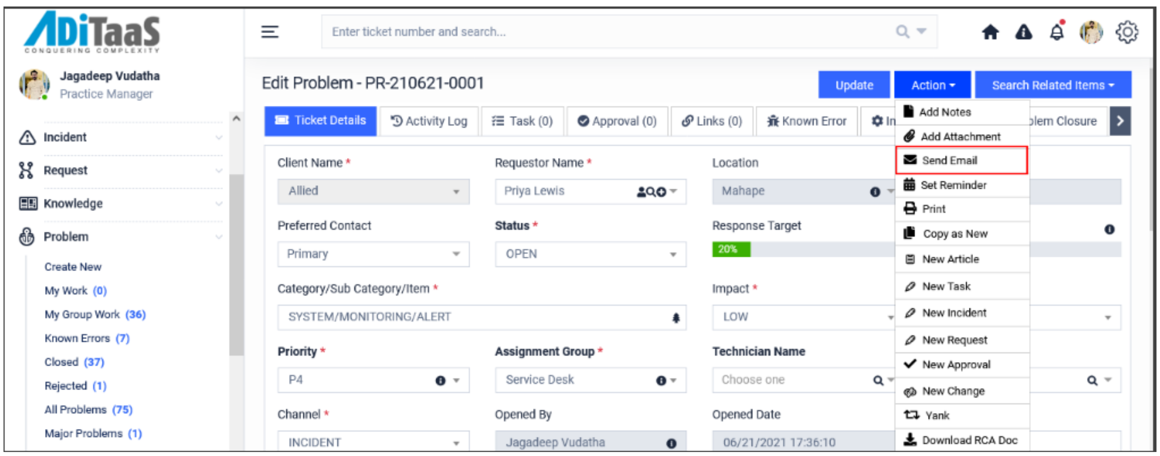


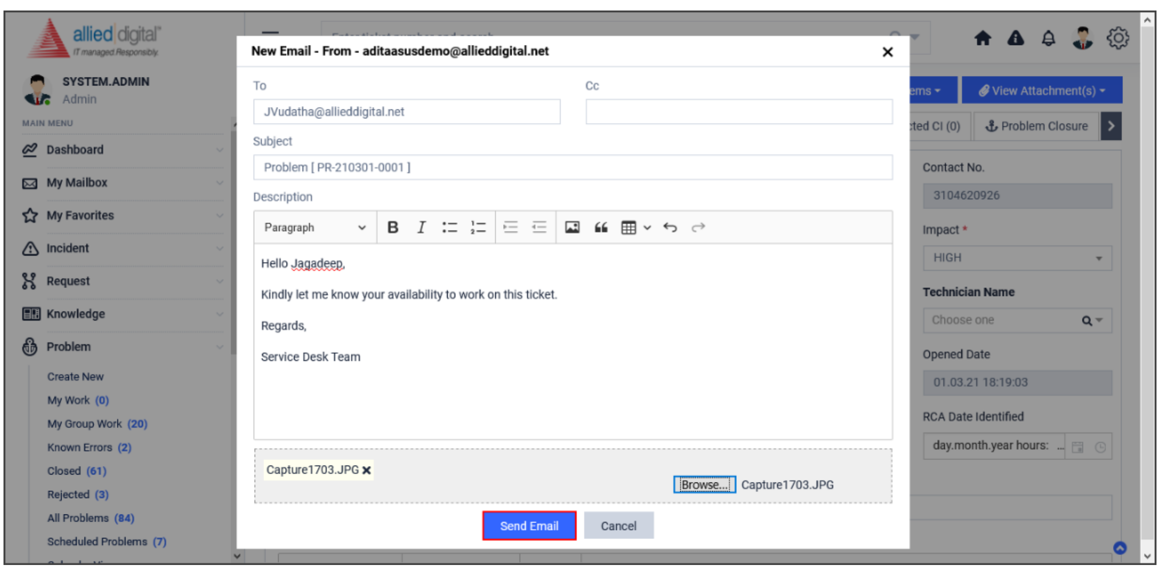
To quick delete an attachment , click on ‘**View Attachment**’ tab and go to respective attachment click on ‘**x**’ placed next to it.



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.



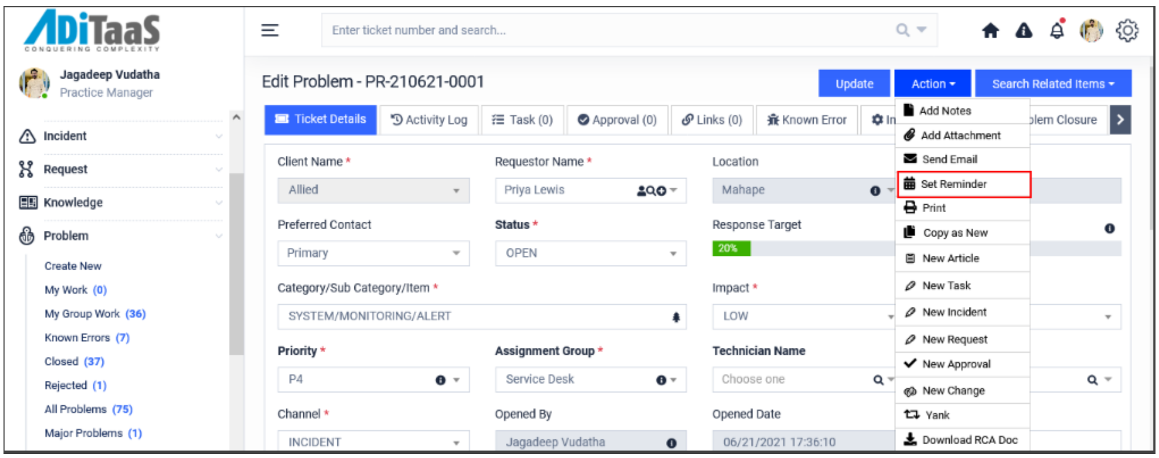


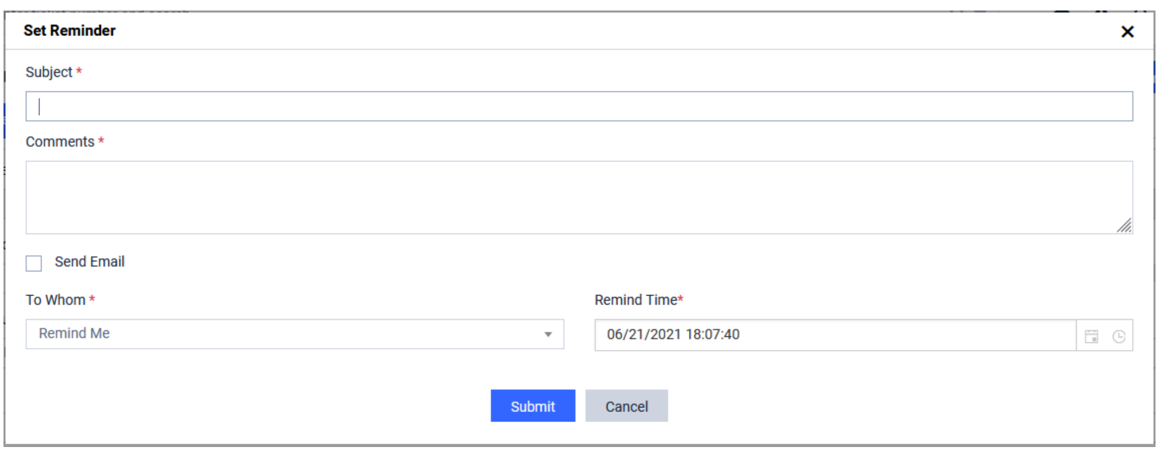
3. When complete, click on ‘**Send Email**’. All actions are captured in Activity Log.

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 whom you want to remind.

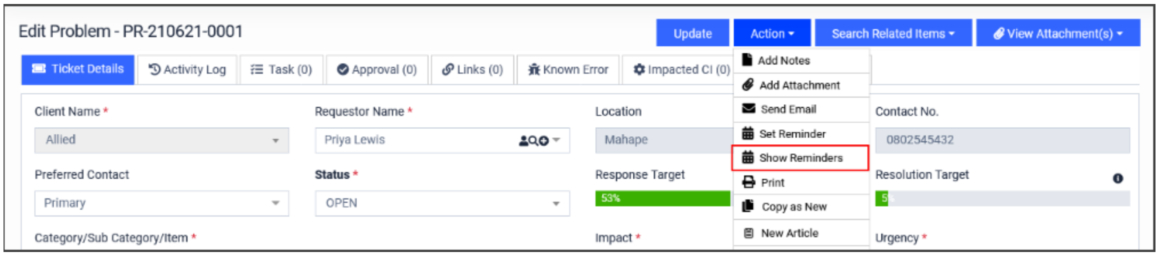
1. To a set reminder, click on **Action → Set Reminder.**
2. Set reminder dialog box is displayed. Enter the **Subject** and **Comments** in box.
3. Select checkbox, if required to send an email notification regarding the notification.
4. In select applicable option from '**To Whom**' drop down list.
    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.

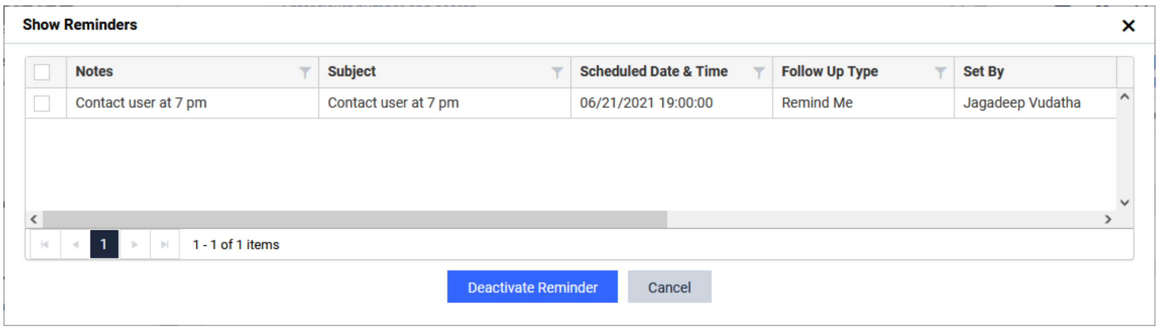


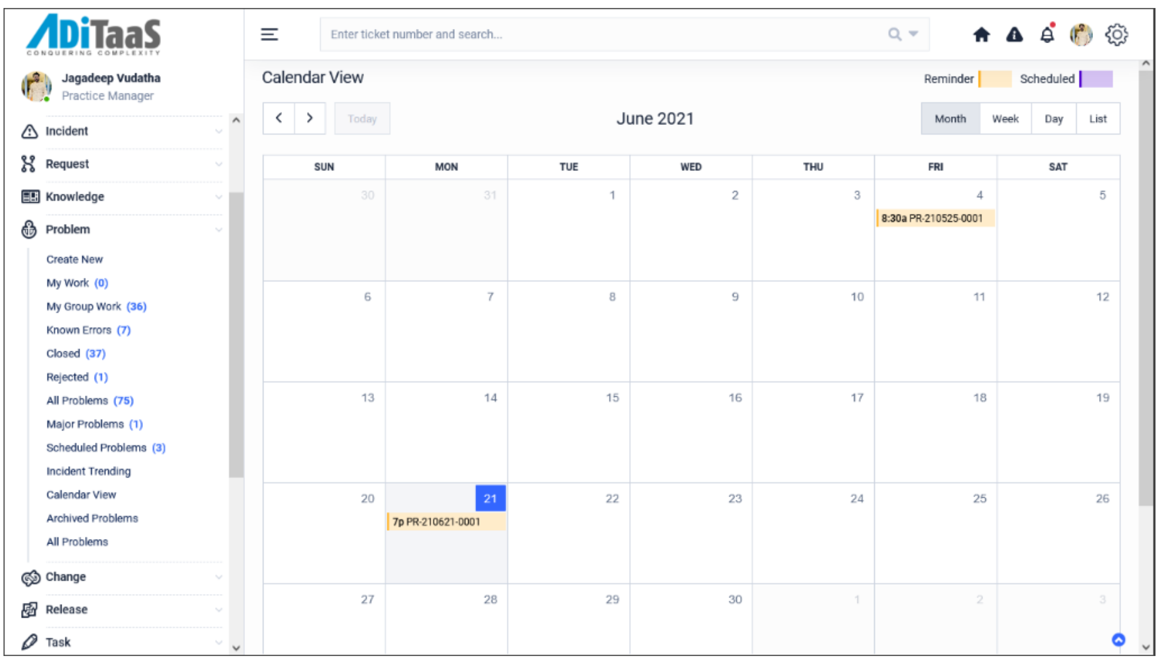


SHOW REMINDERS

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



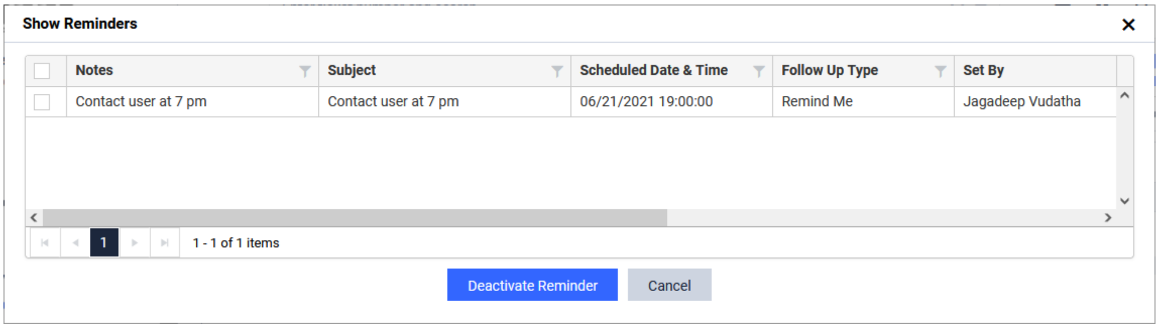




Deactivate the Reminder

Scheduled reminder can be deactivated with simple following steps.

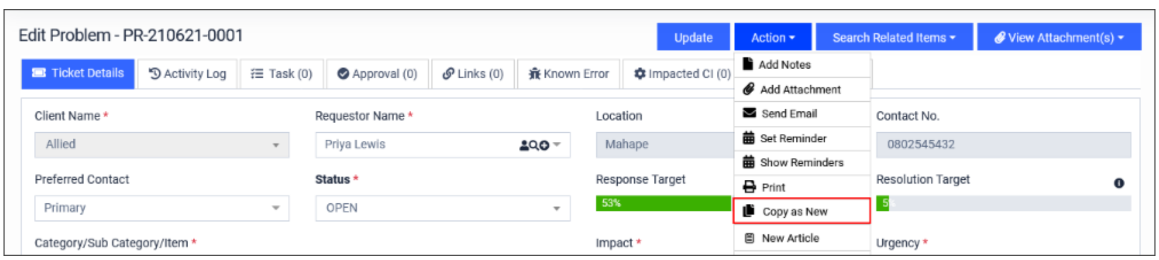
1. Go to **Action→Show Reminders**
2. Select reminder and click on **Deactivate Reminder**
3. Reminder Status will be marked as deactivated.

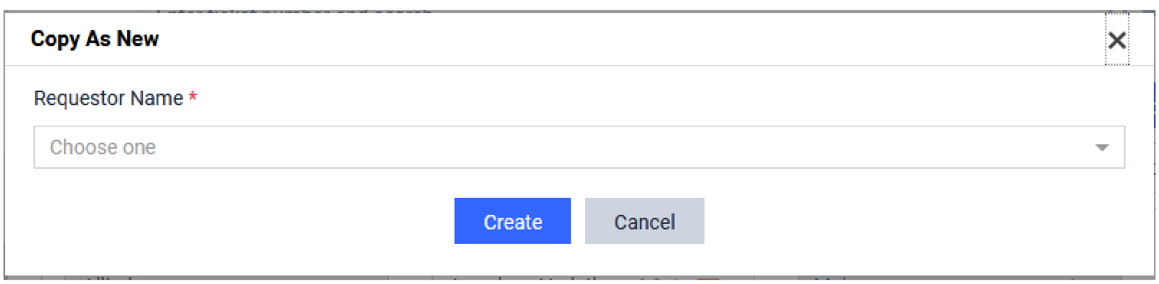


COPY AS NEW

'**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**

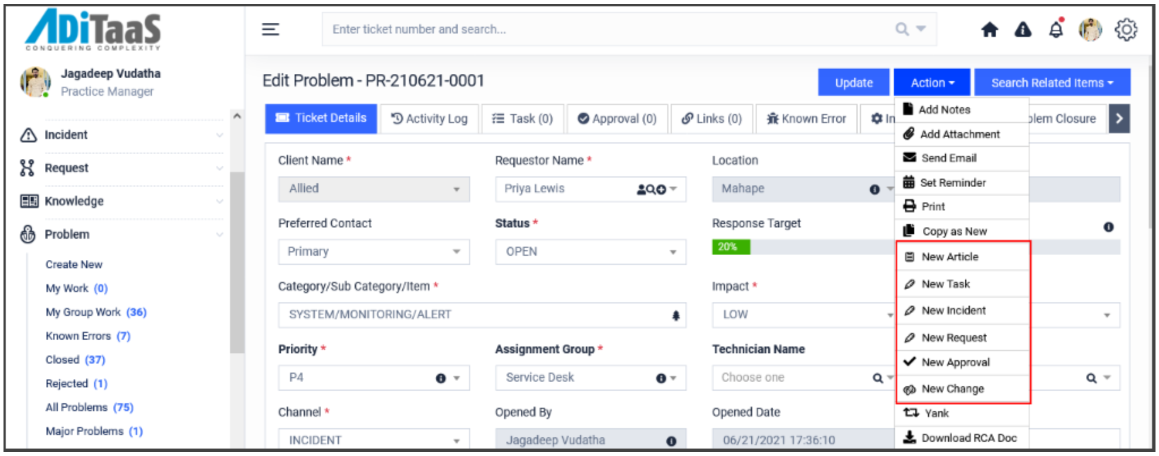




3. Search and select required **Requestor Name** and Click **Create.**

QUICK LINKS TO CREATE TICKETS

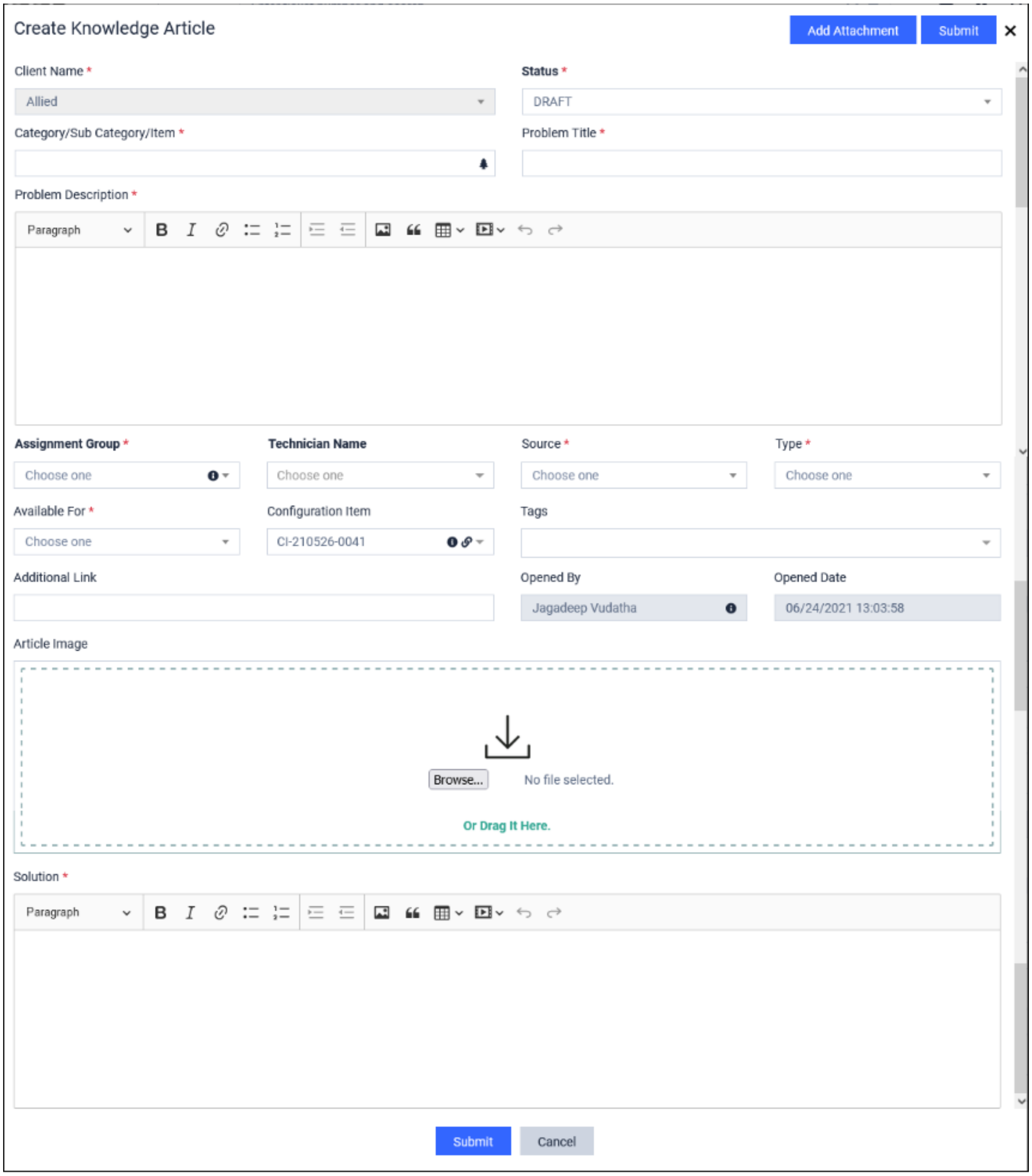
Following links helps to create other module ticket from Problem ticket.



NEW ARTICLE

Allows to raise an article from Problem ticket.

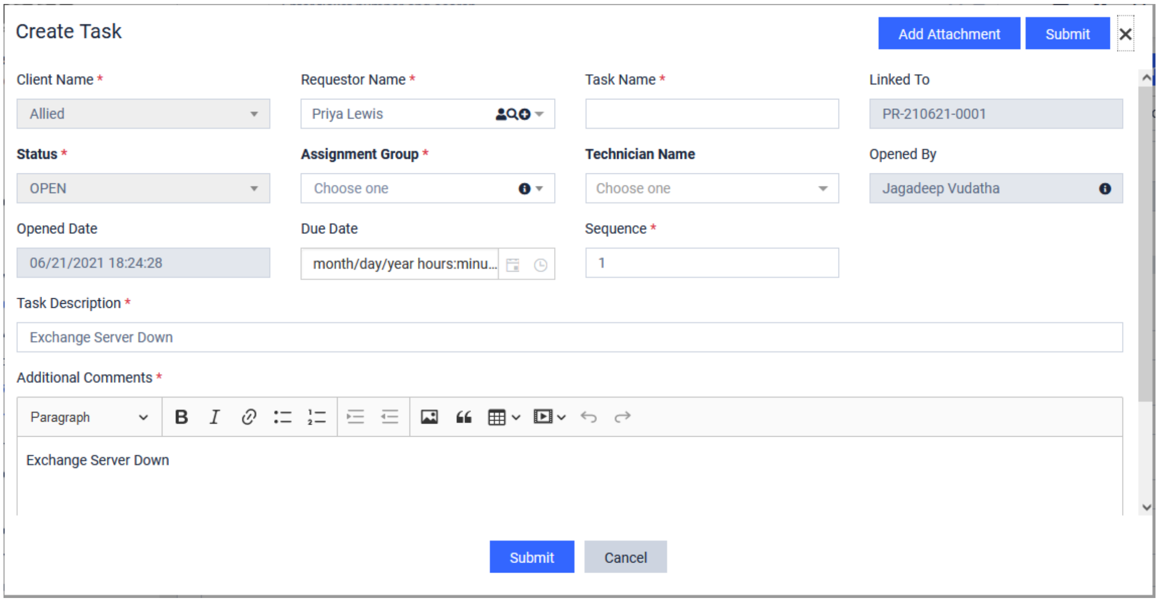
1. Go to **Action → New Article**
2. Enter the new article details and click on submit
3. New created article will be linked to Problem ticket.



NEW TASK

Allows to raise a new task ticket from Problem ticket.

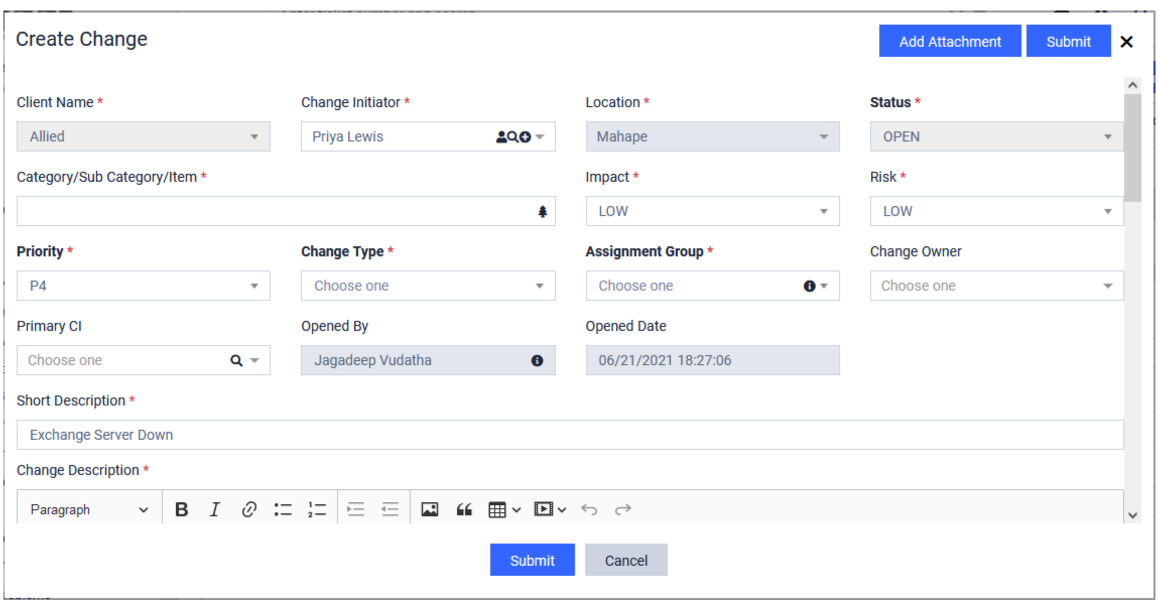
1. Go to **Action → New Task**
2. Enter the new task details and click on submit
3. New created task ticket will be linked to Problem ticket.



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.

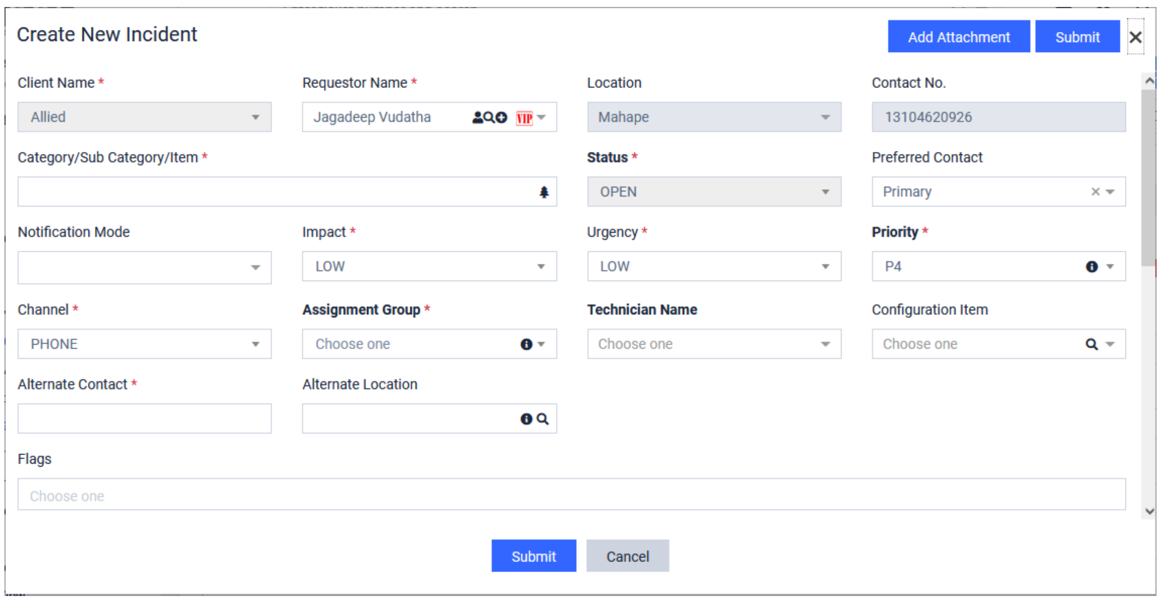


NEW INCIDENT

Allows to raise a new incident ticket from Problem ticket.

1. Go to **Action → New Incident**

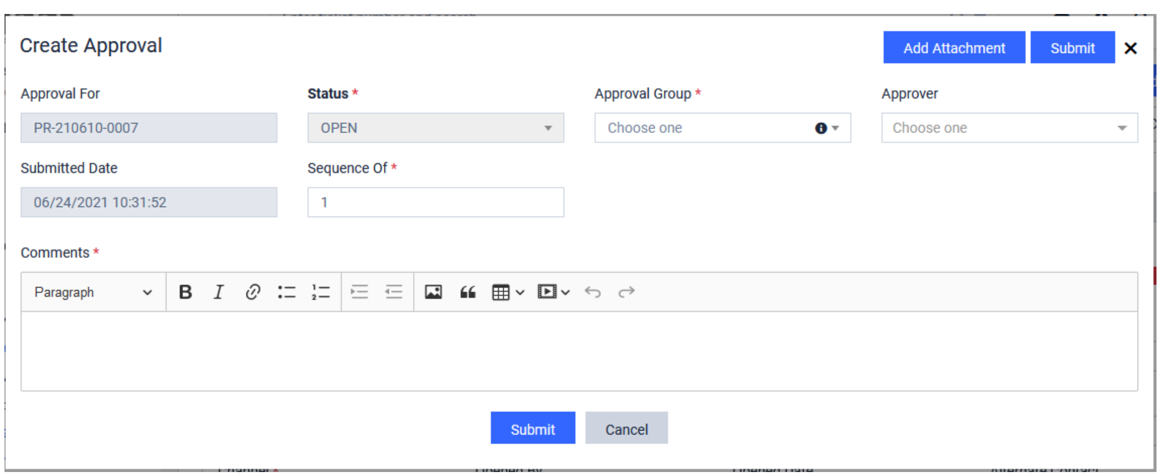
2. Enter the new incident details and click on submit
3. New created incident ticket will be linked to Problem ticket.



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.



PROBLEM ACTIVITY LOG

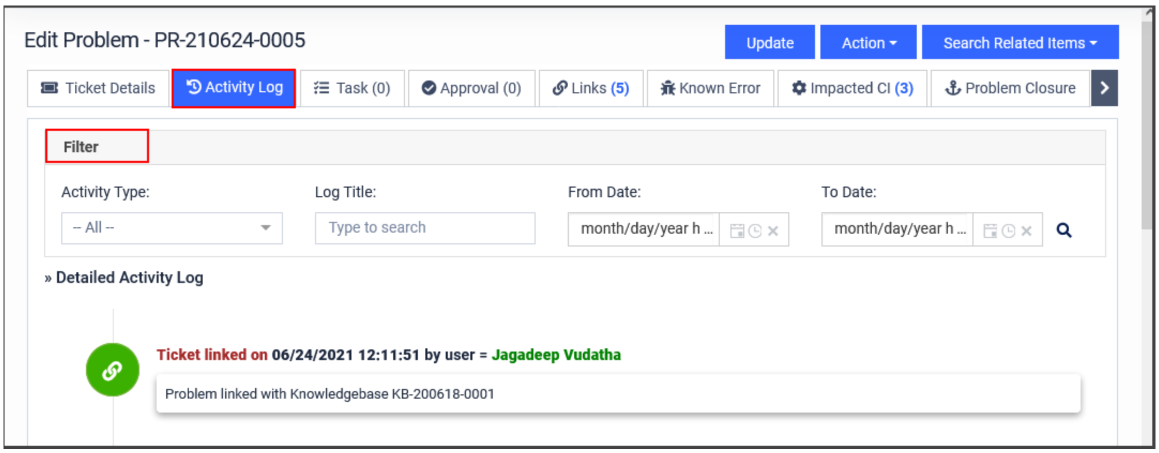
Activity log captures all actions performed on ticket from problem creation to closure with date/time stamp along with agent id. All modification performed on ticket is auto captured. Activity Log helps to determine the order. From the creation of ticket to resolution all activities are captured with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

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

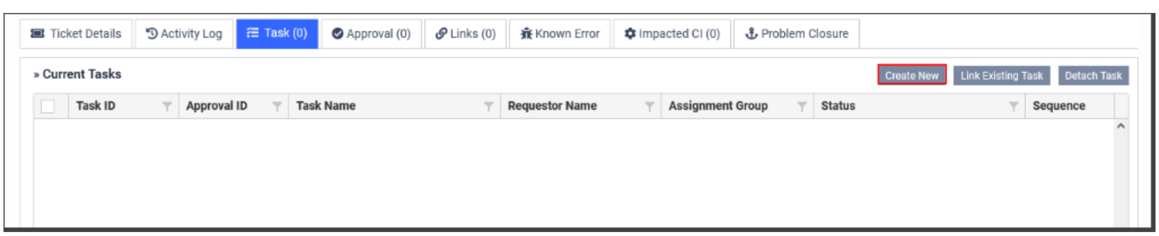


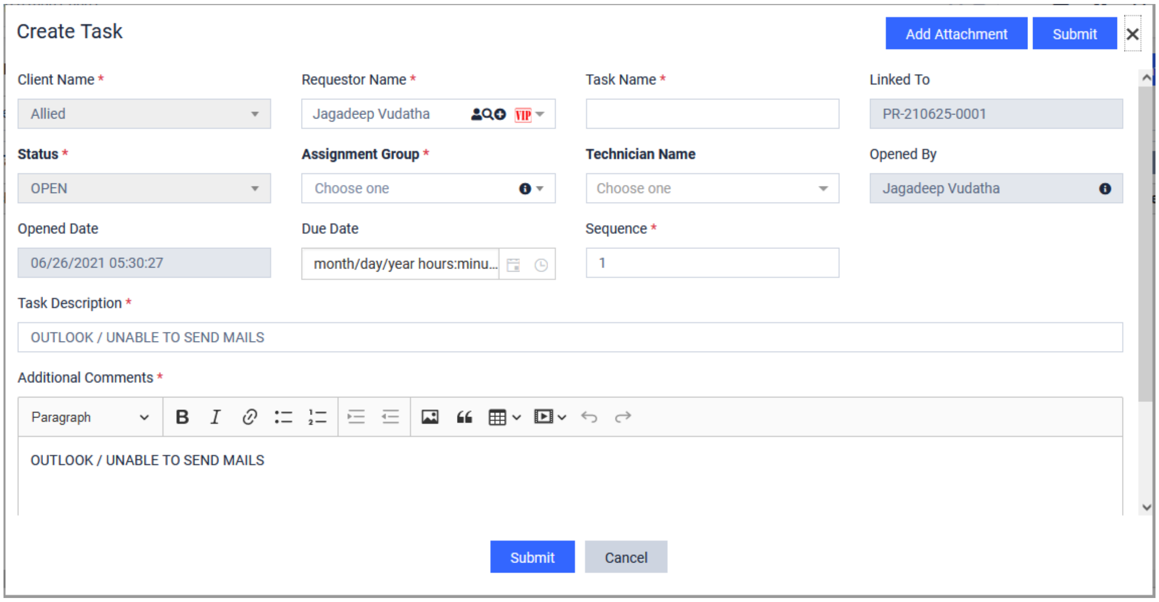
Note: Logs in the tool protected from alteration after-the-fact.

TASK

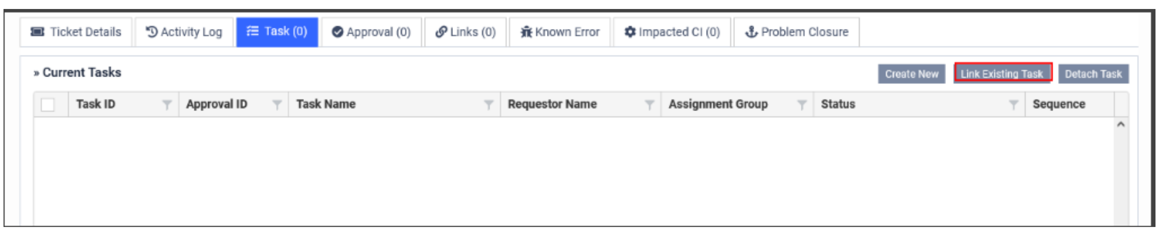
Agent can create a new Task or open any existing tasks and link to Problem. Problem ticket cannot be closed until all linked tasks are closed.

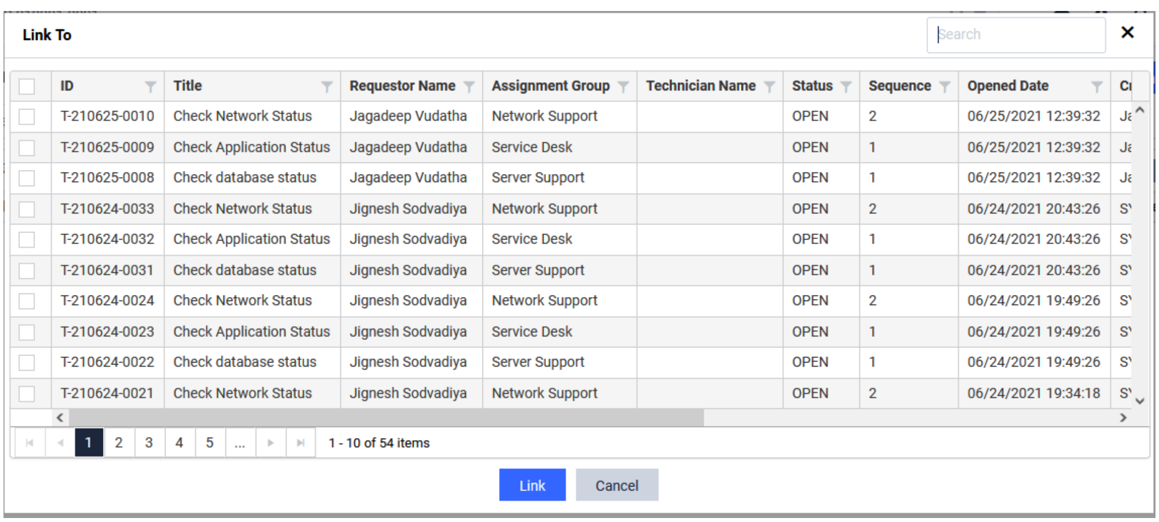
Create New- Click on **Task → Create New** to create a new Task.



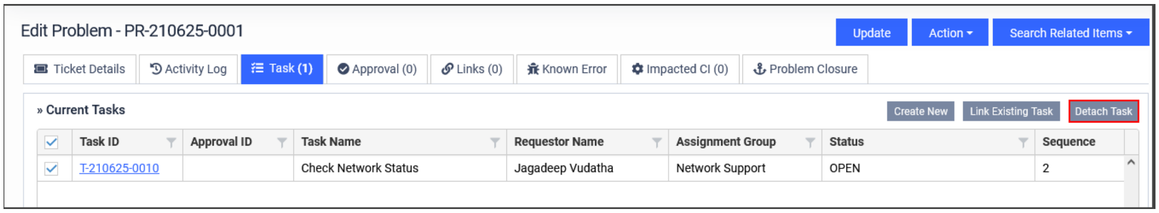


Link Existing Task- To link existing Tasks, click on **Task → Link Existing Task**
Displays list of existing Tasks. Agent can link one or more tasks to Problem by clicking on Link button after selecting the task checkbox.





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



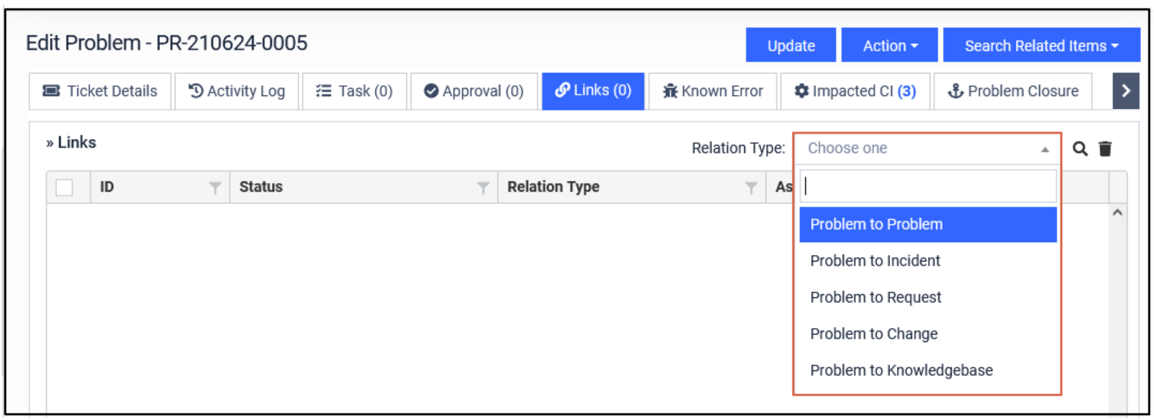
LINKS

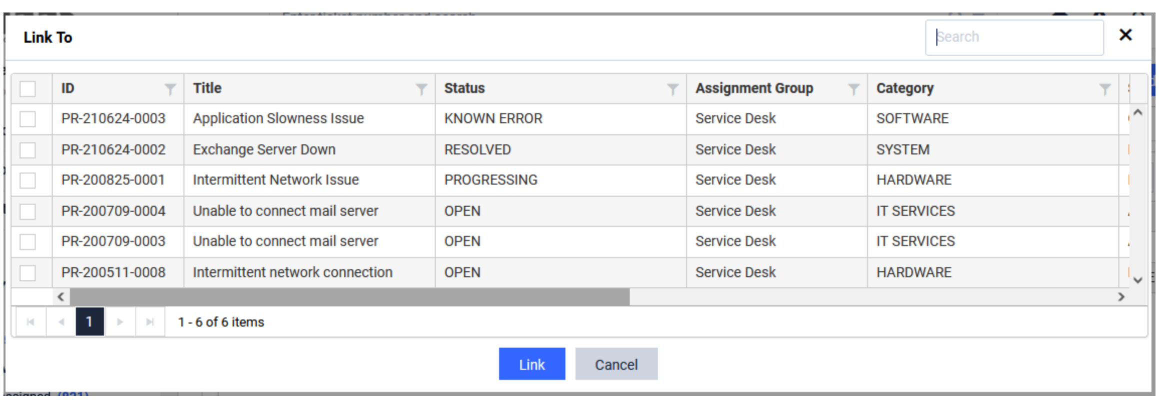
This tab allows agents to create relationships by linking Problem to other tickets in system.

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**'



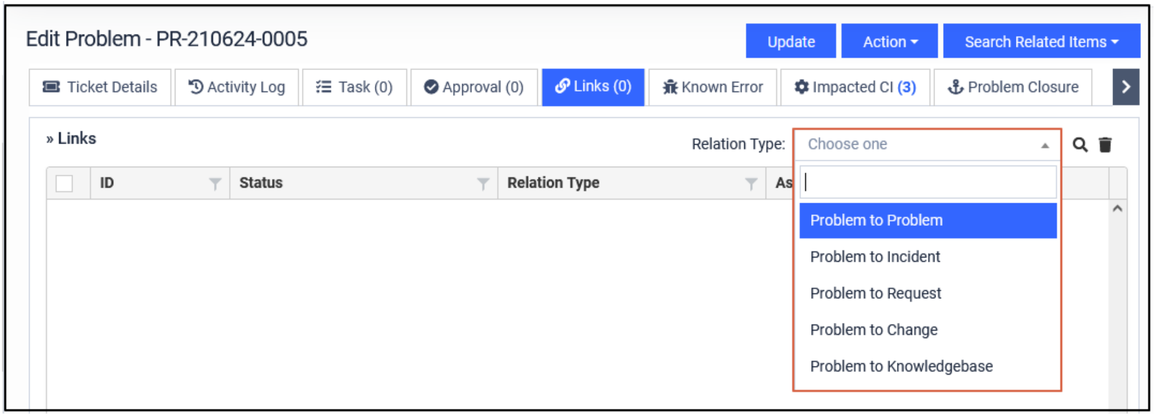


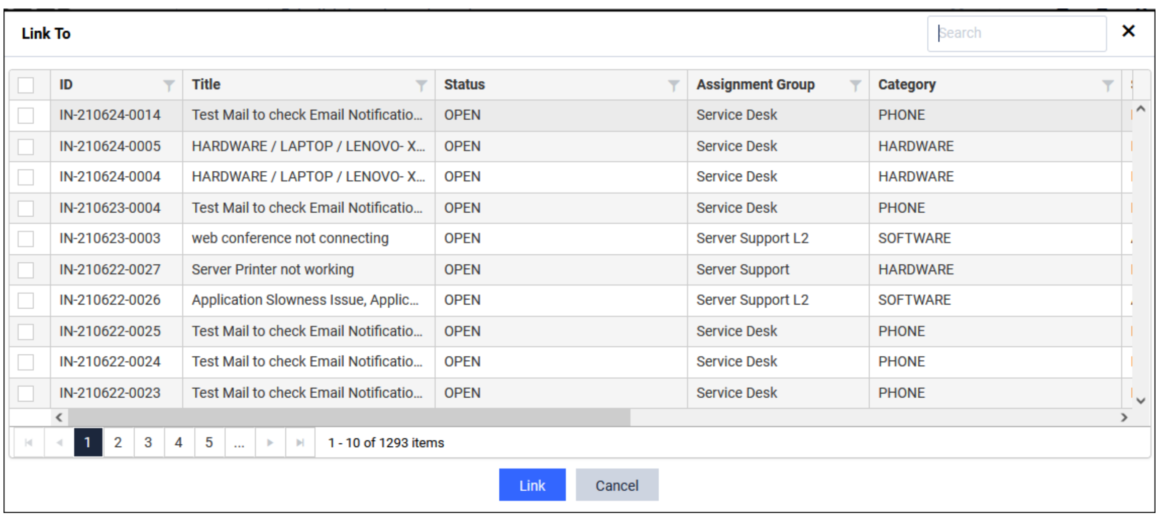
4. Click on 🔍 icon, which will display all open problems in a pop-up box. Agent can select problems and attach to problem.
5. Click on Link

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**'

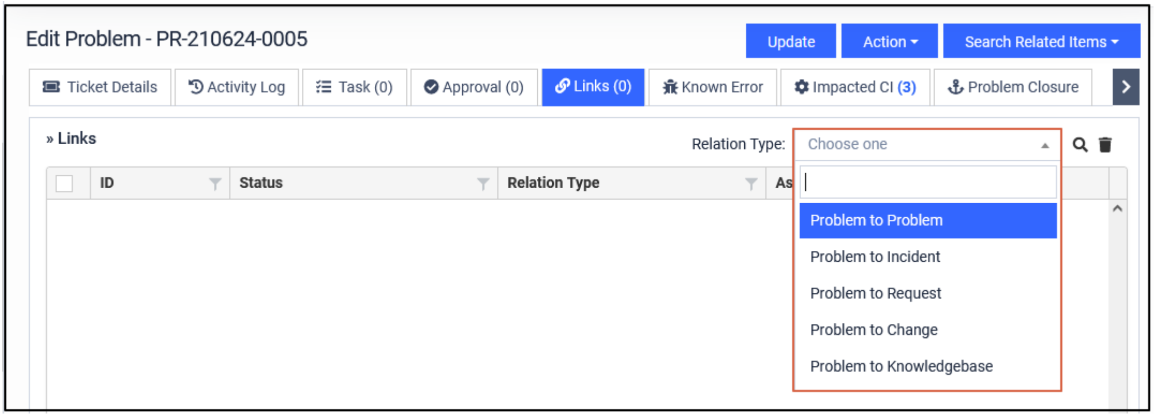


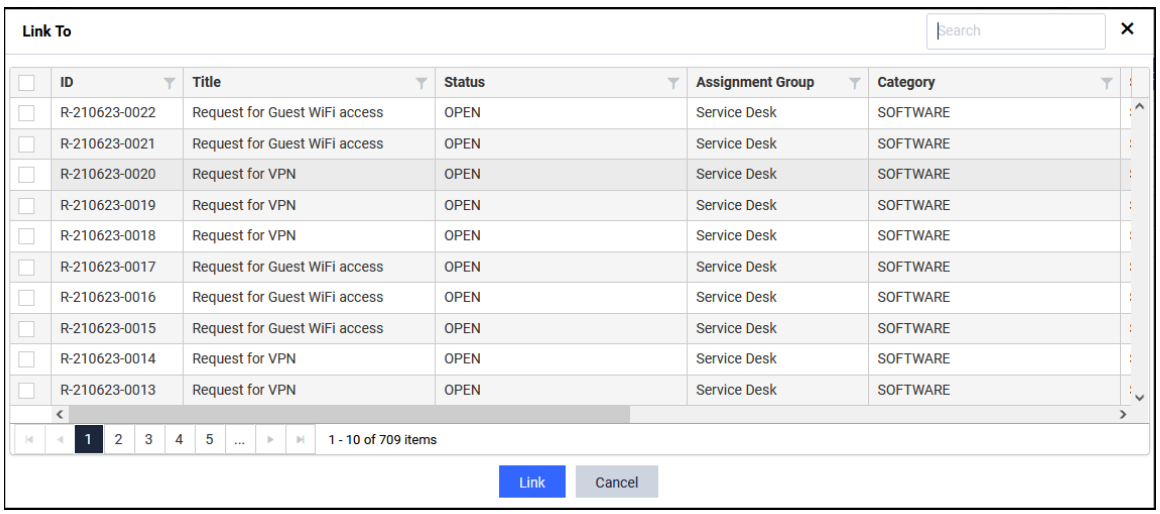


4. Click on icon, which will display all open incidents in a pop-up box. Agent can select incidents and attach to problem.
5. Click on Link
6. Linked ticket will be visible on Links tab.

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**'

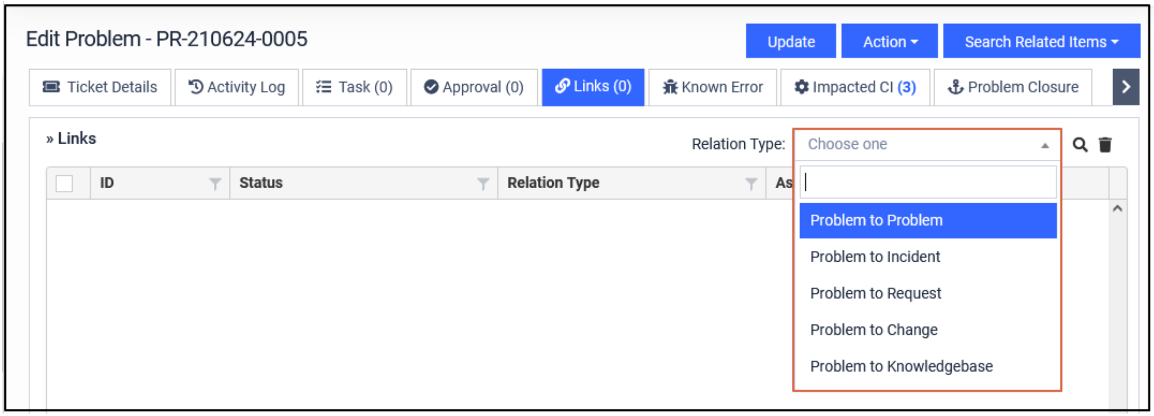


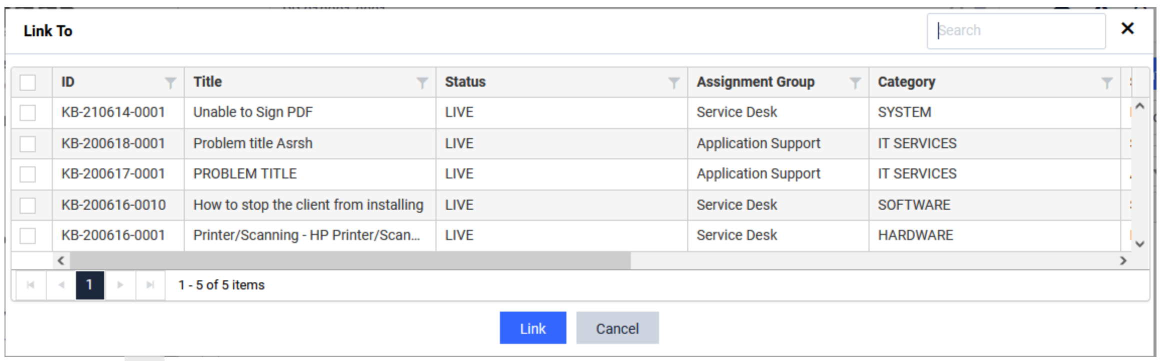


4. Click on  icon, which will display all open requests in a pop-up box. Agent can select requests and attach to problem.
5. Click on Link
6. Linked ticket will be visible on Links tab.

Problem to Knowledgebase: Problem can be linked to Knowledge Article

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 Knowledgebase**'

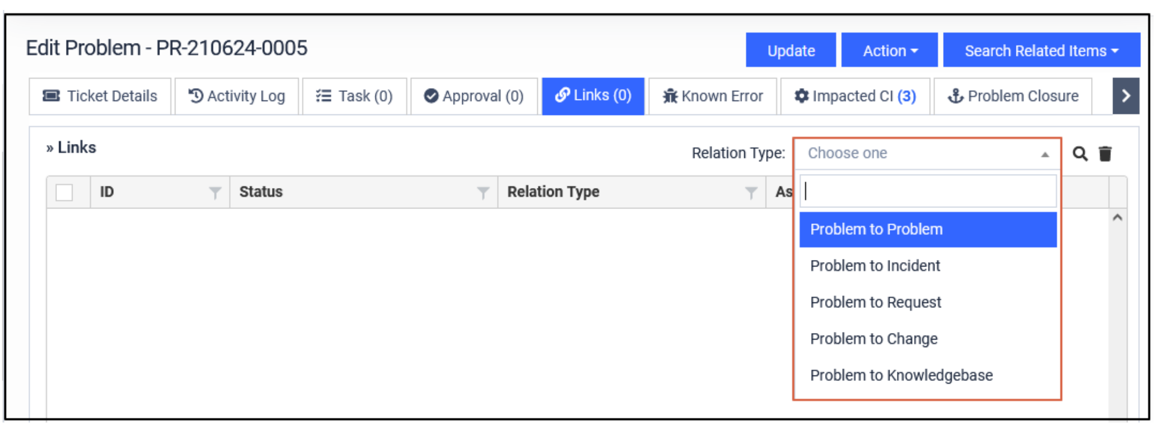


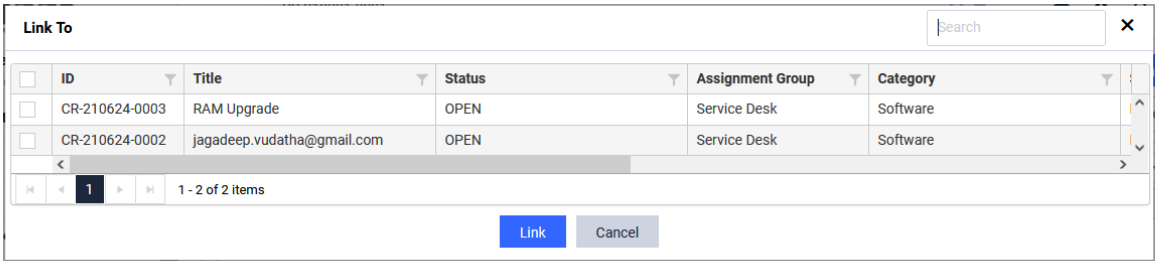


4. Click on icon, which will display all articles in a pop-up box. Agent can select article and attach to problem.
5. Click on Link
6. Linked article will be visible on Links tab.

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**'





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.

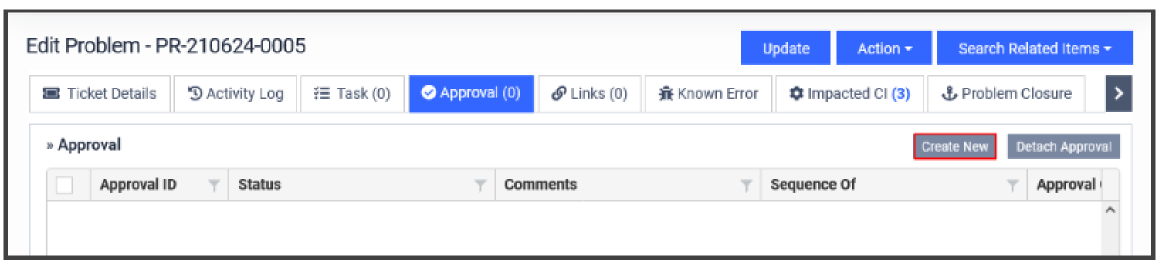
Detach Ticket**:** The agent can detach a linked incident or any other ticket by selecting a ticket and clicking on the Delete button.

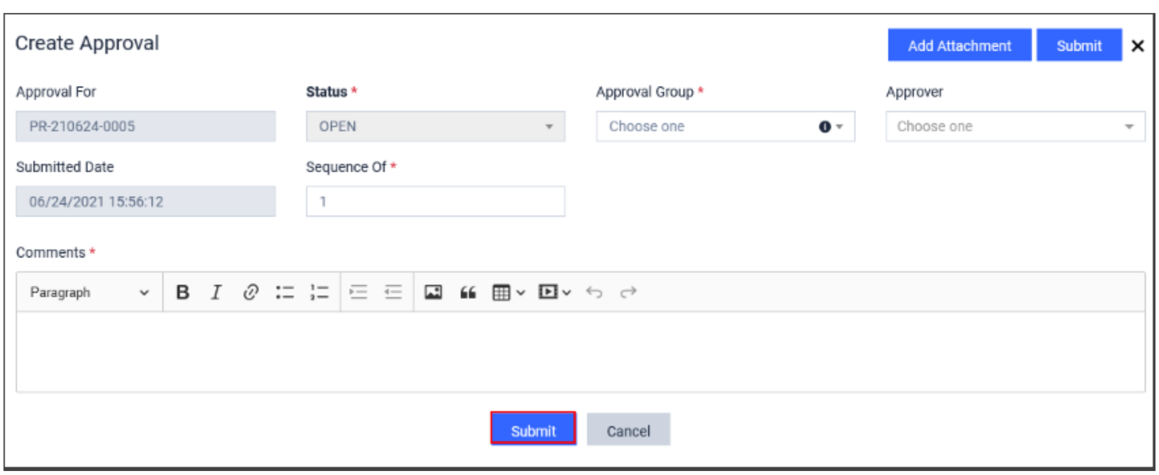
APPROVALS

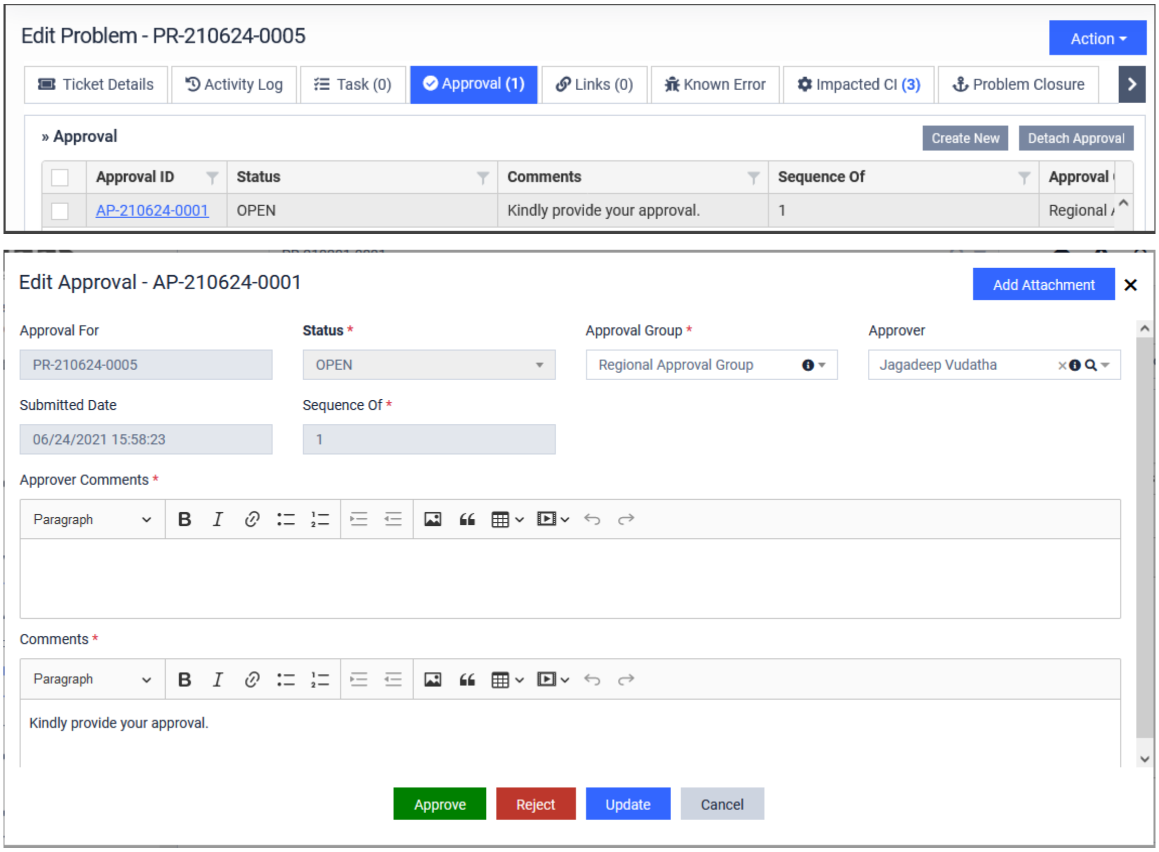
Create New

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.





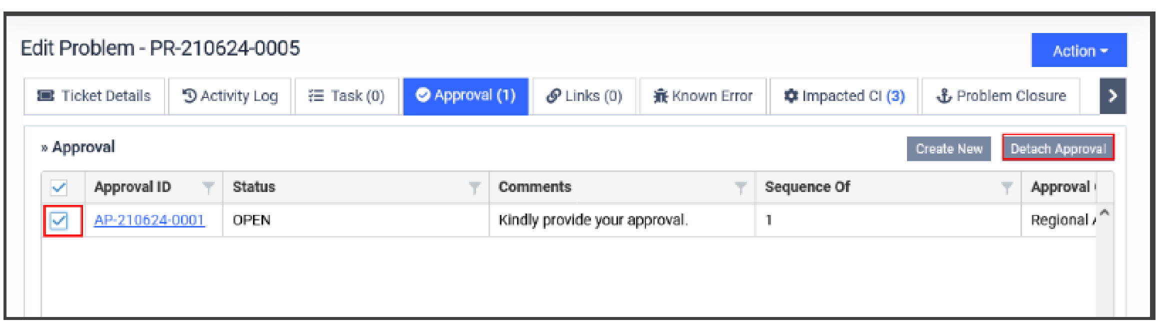


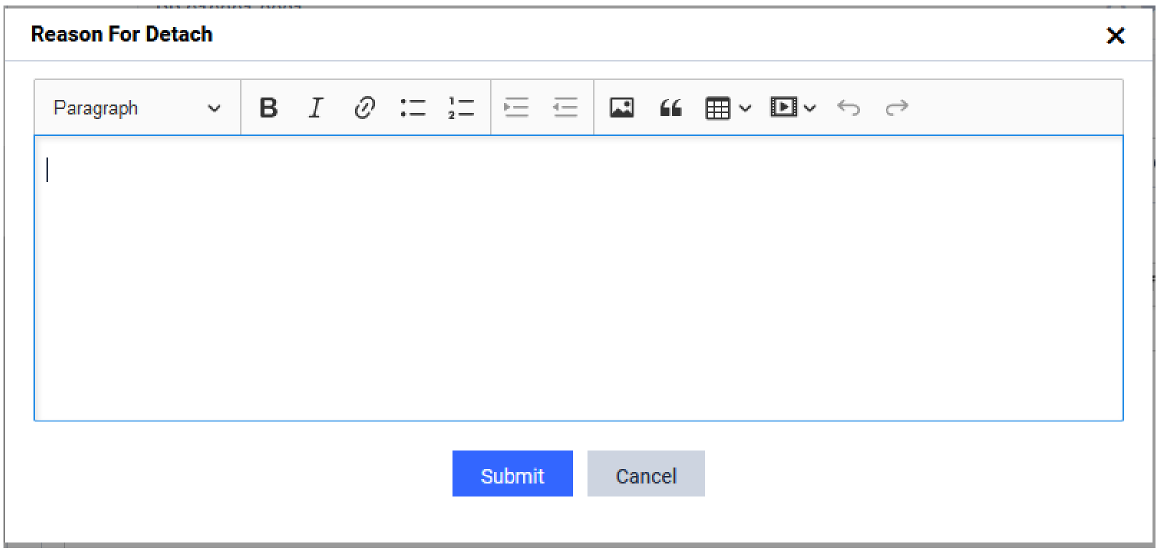
On submitting a request for approval, approver will receive an approval mail with a link to approve or reject the request.

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**'.



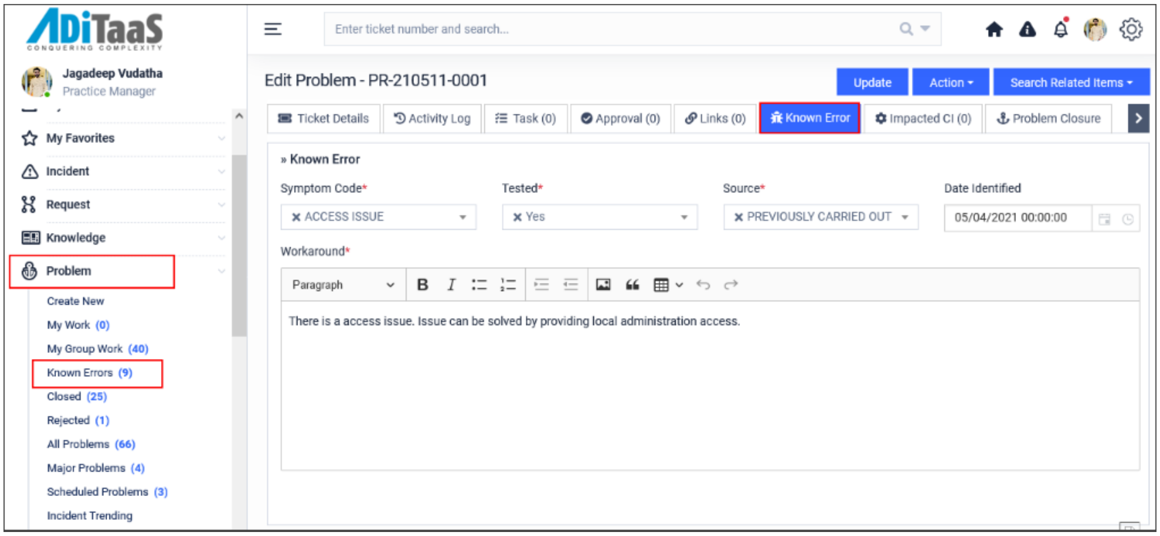


KNOWN ERROR

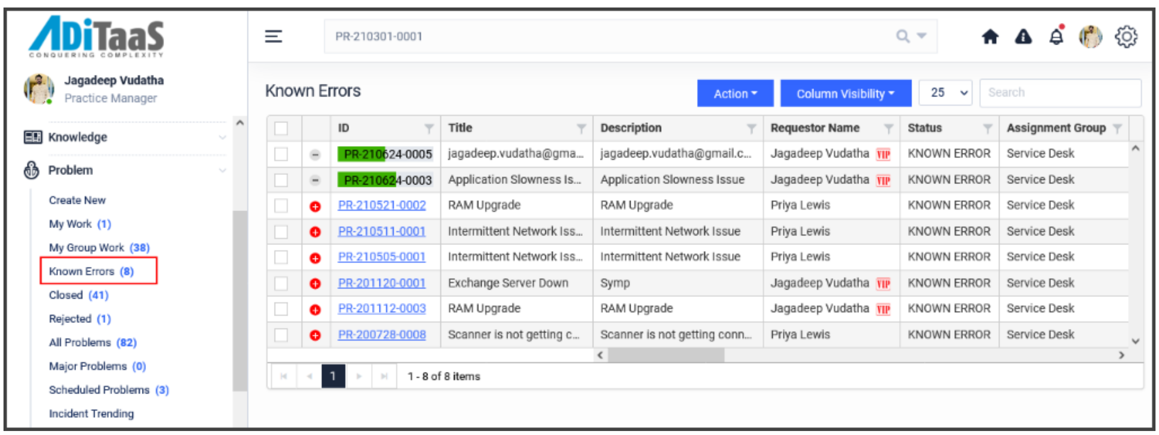
A Known Error is a problem that has a documented root cause and a workaround. Problem ticket has a separate status called ‘Known Error’. Upon changing status to Known Error, there is a provision to capture details regarding the Known Error.

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

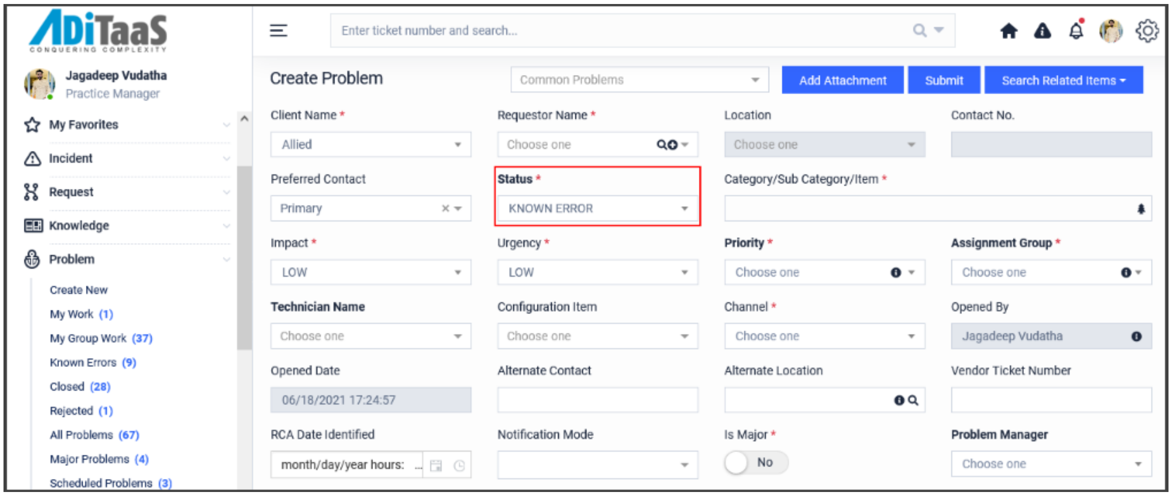


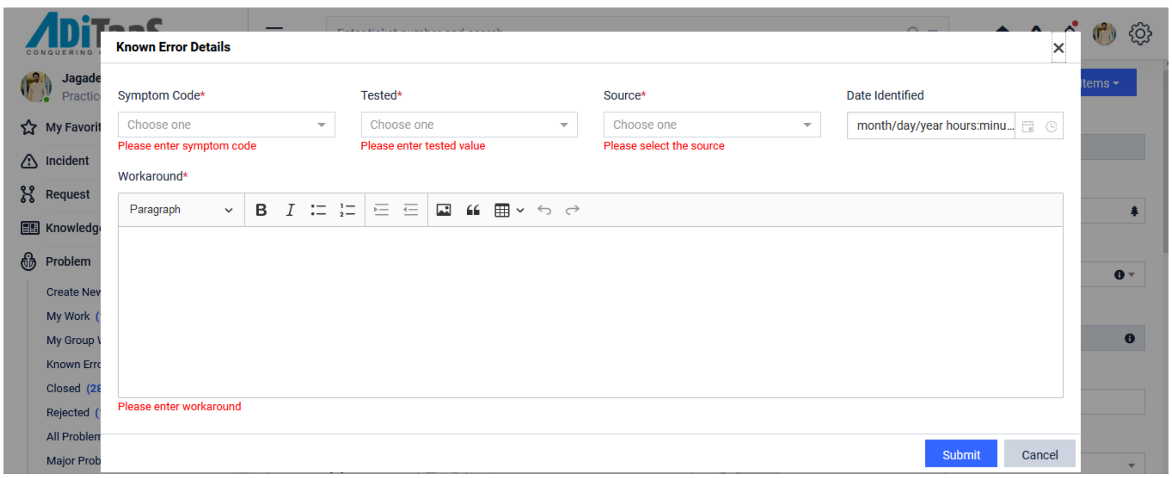
There is a separate link provided to access Known Error records.

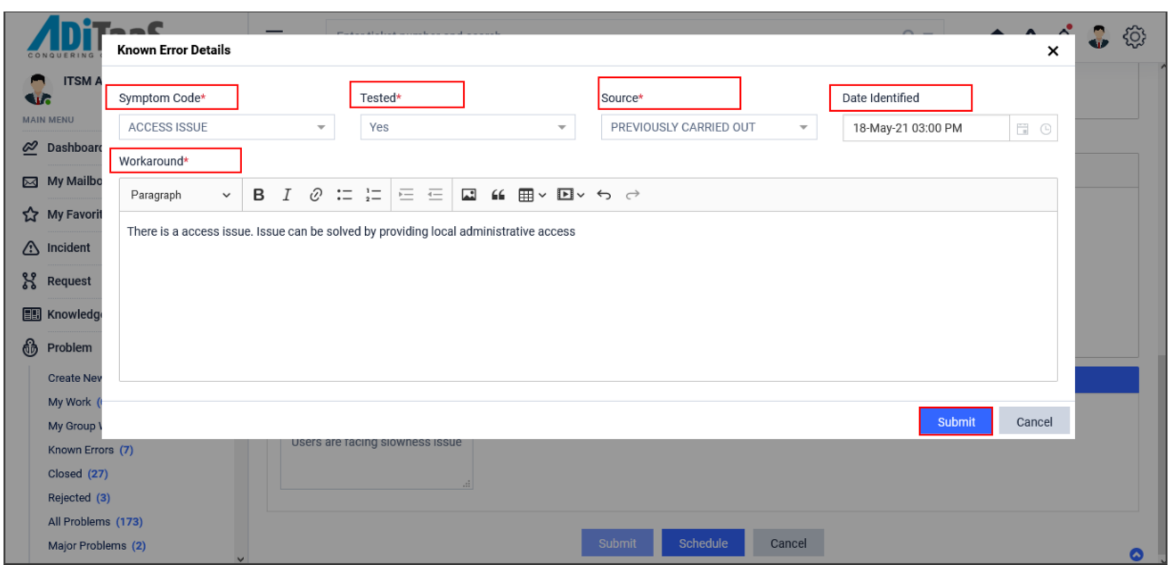


Tool facilitate the opening of a Problem Record with Known Error status and before submitting the Problem record it's mandatory to fill the Known Error details.

ADiTaaS Digital Service Management





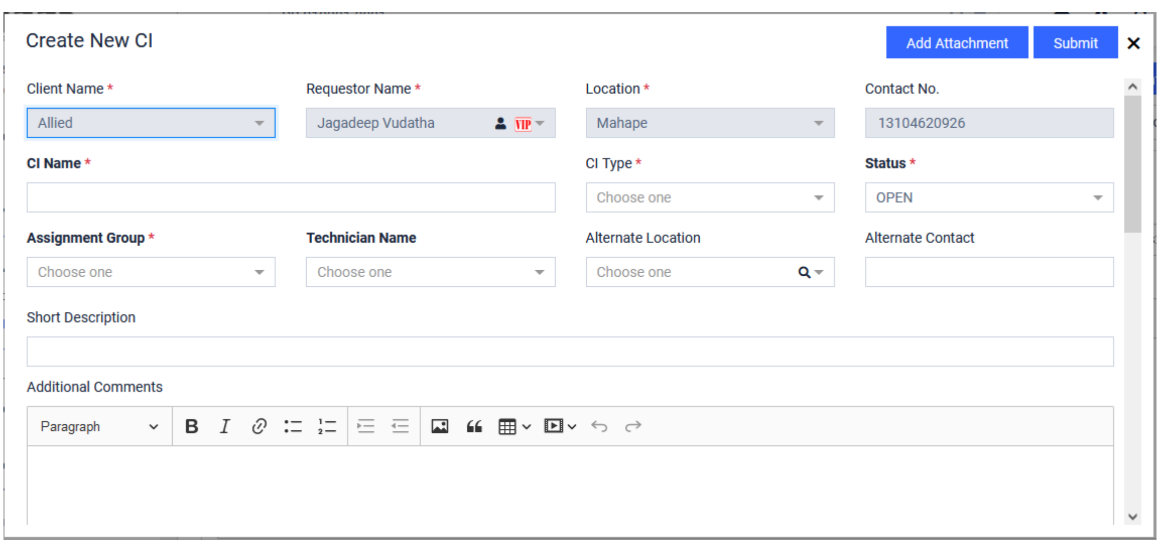


Known error details are captured in Activity log.

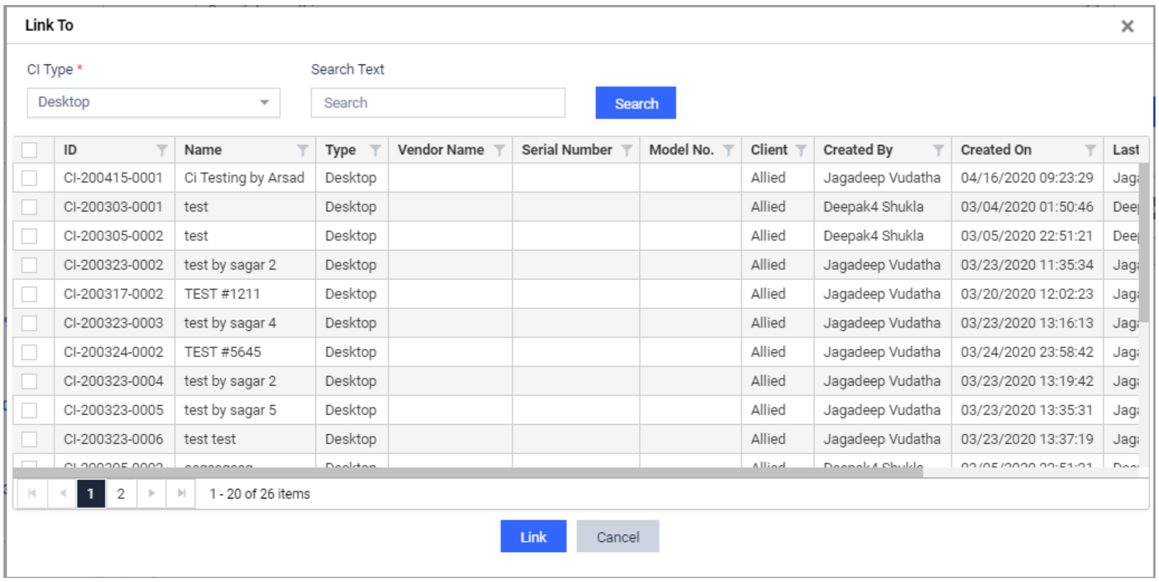
IMPACTED CI

Related configuration items can be added under ‘Impacted CI’ tab.

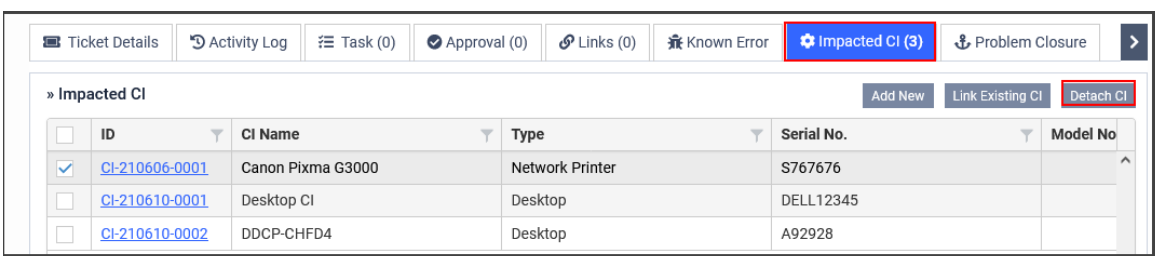
Add New- Allows to create a new CI and link to Problem.

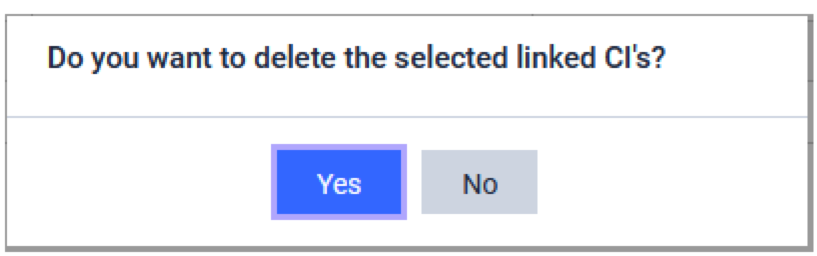


Link Existing CI- On clicking link existing CI, displays all available CI and agent can select related CI and link to Problem.



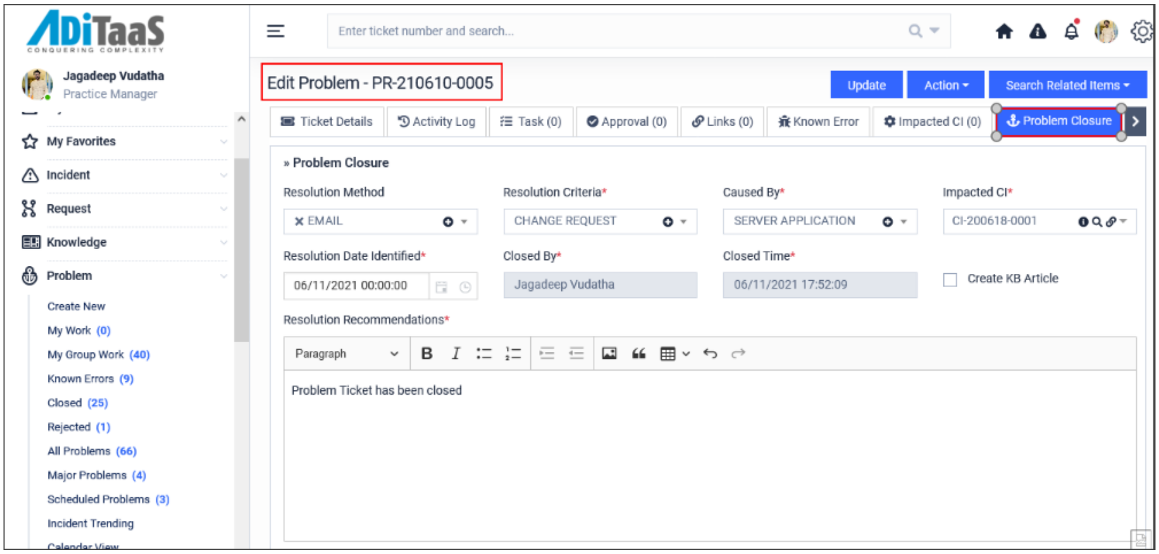
Detach CI- Linked CI can de detached by clicking on '**Detach CI**'.





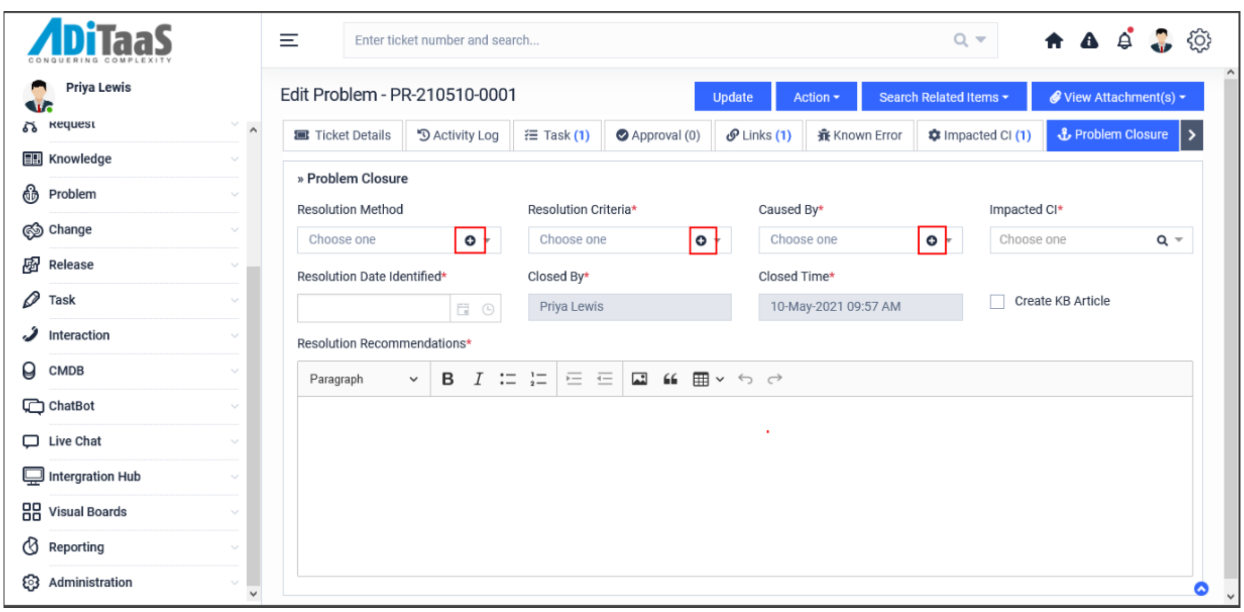
PROBLEM CLOSURE

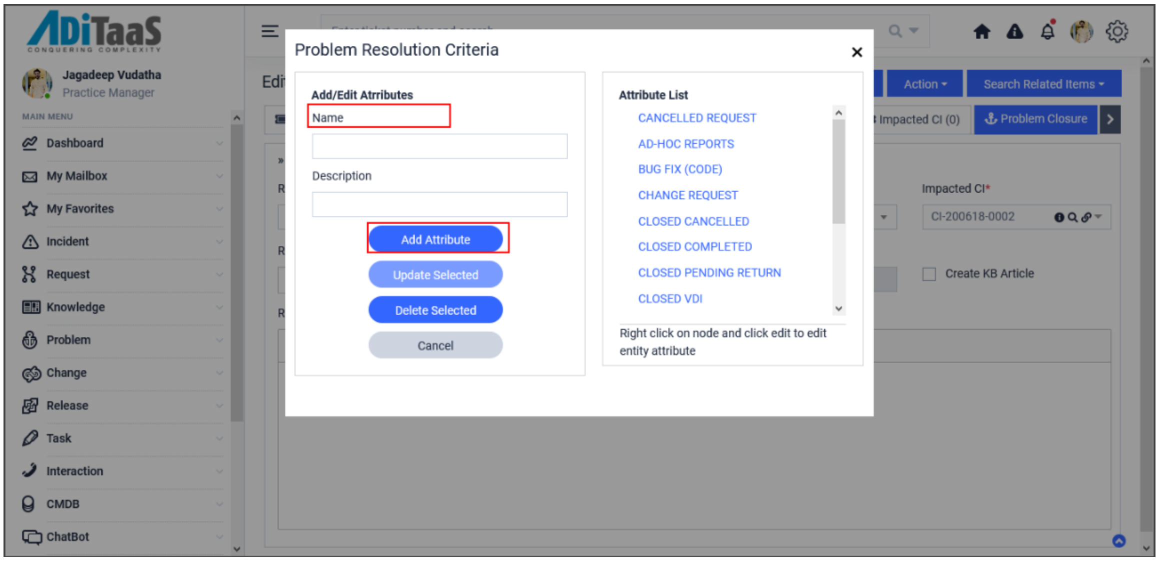
The Problem Closure tab fields will be enabled once **CLOSED** has been selected from the status dropdown. The agent need to specify **Resolution Method, Resolution Criteria** and **Caused By** from the dropdown. Enter **Resolution Date Identified, Resolution Recommendations** and click on **Update**

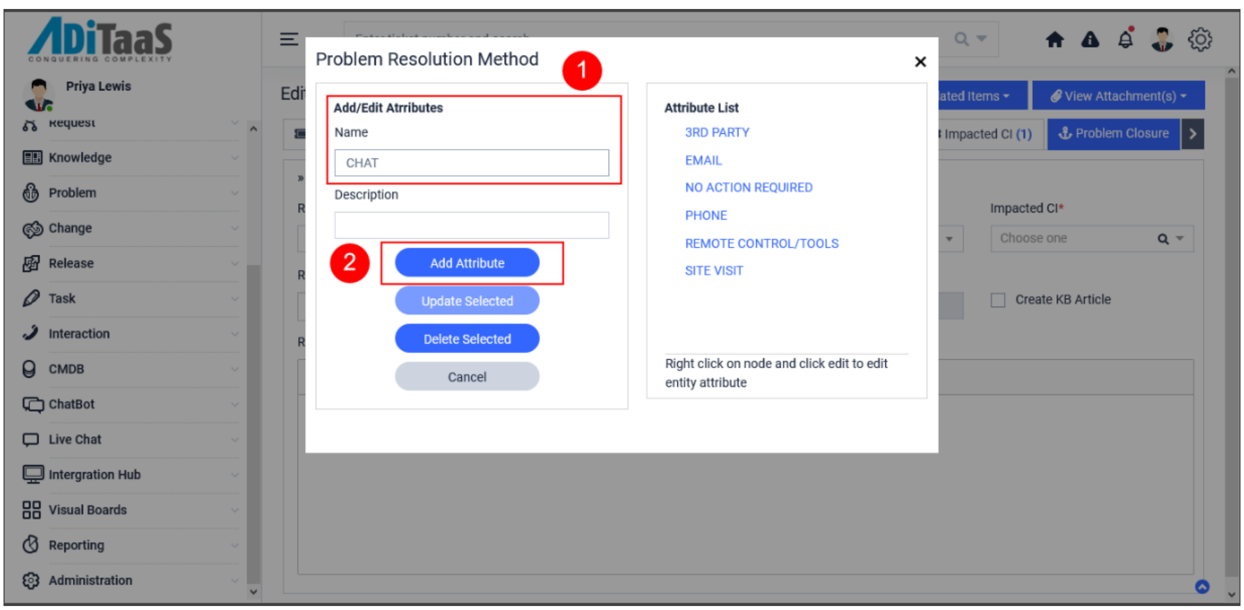


'+' symbol allows authorized user to add any missing / new closure category. Only authorized users will have access to add closure category

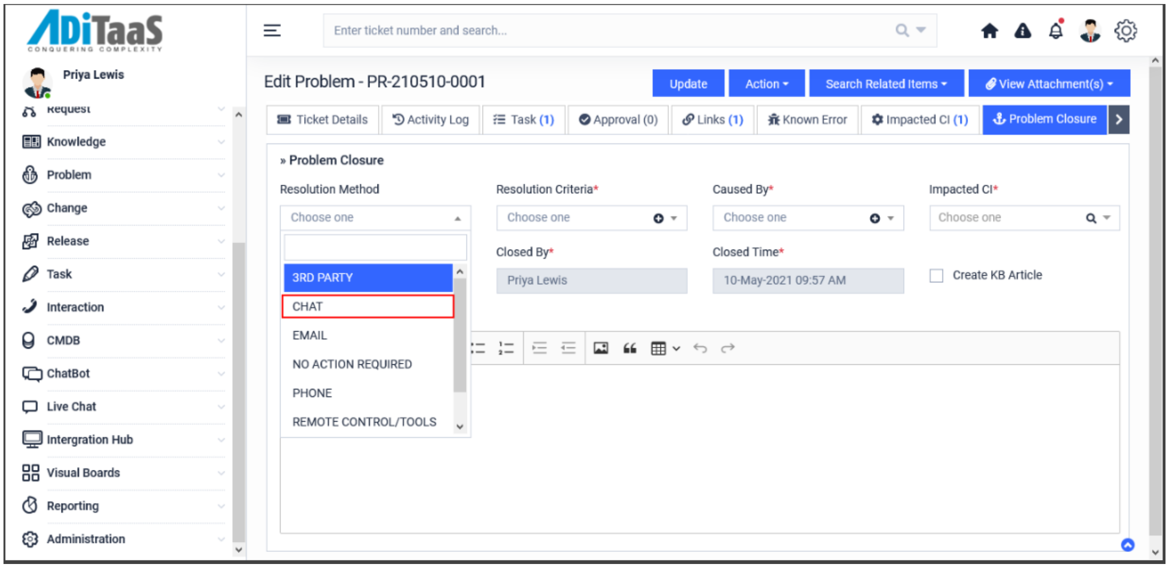
1. Click on '+' symbol on specific text field
2. Enter the new closure category name
3. Click on Add Attribute





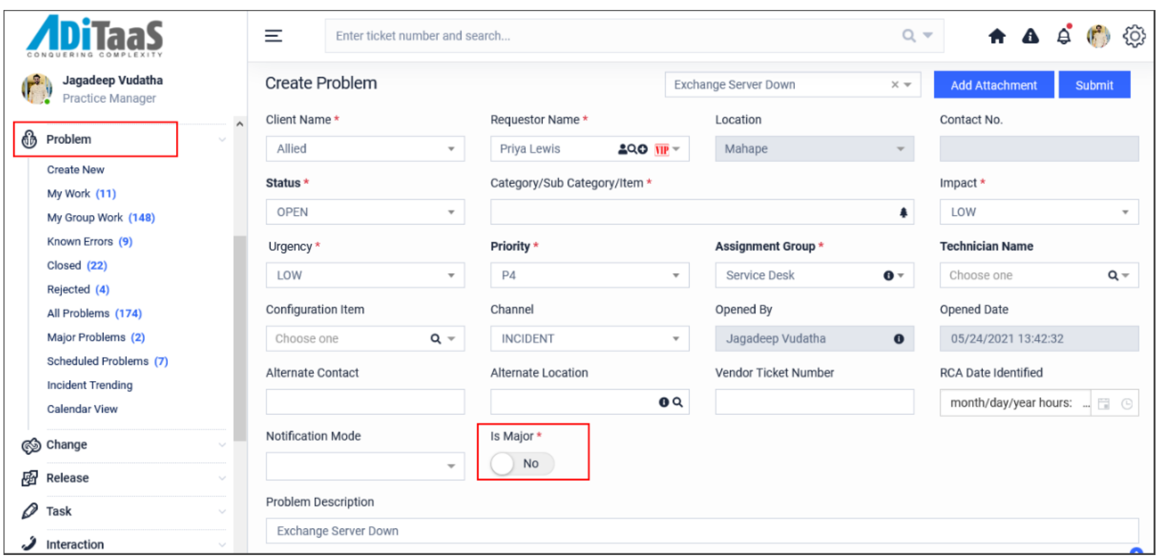


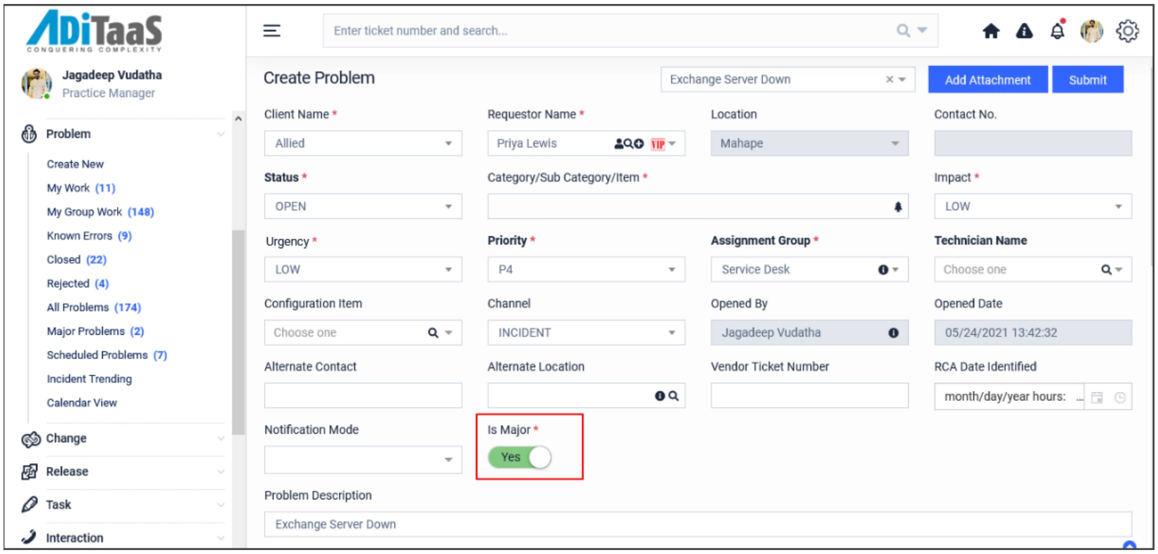
Added value will be displayed on the list on real time.



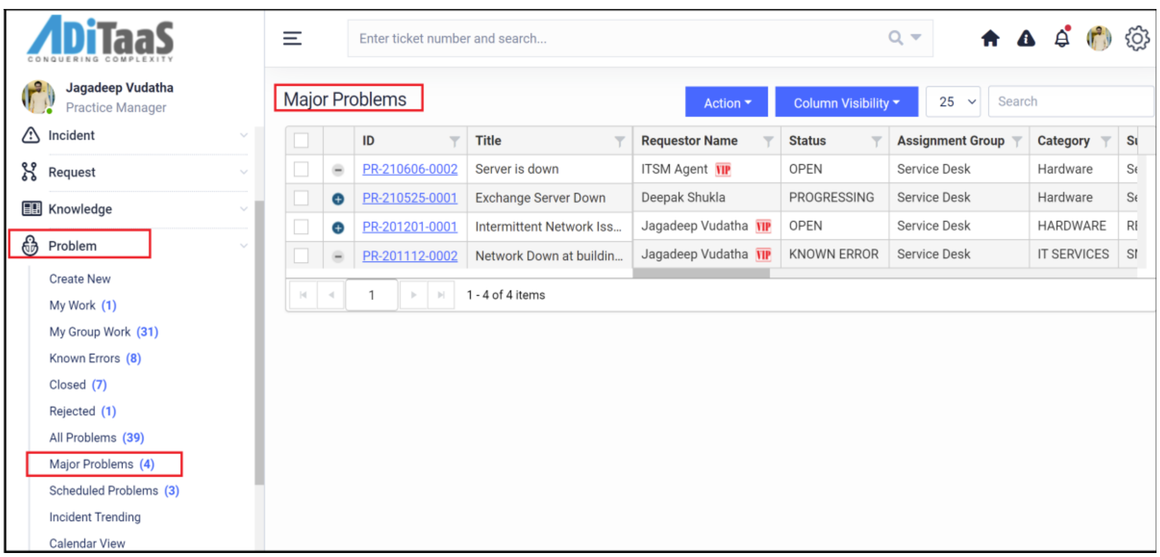
MAJOR PROBLEMS/MAJOR PROBLEM REVIEW

Problem records can be marked as major problem by clicking on Is Major checkbox in create and edit problem screen.

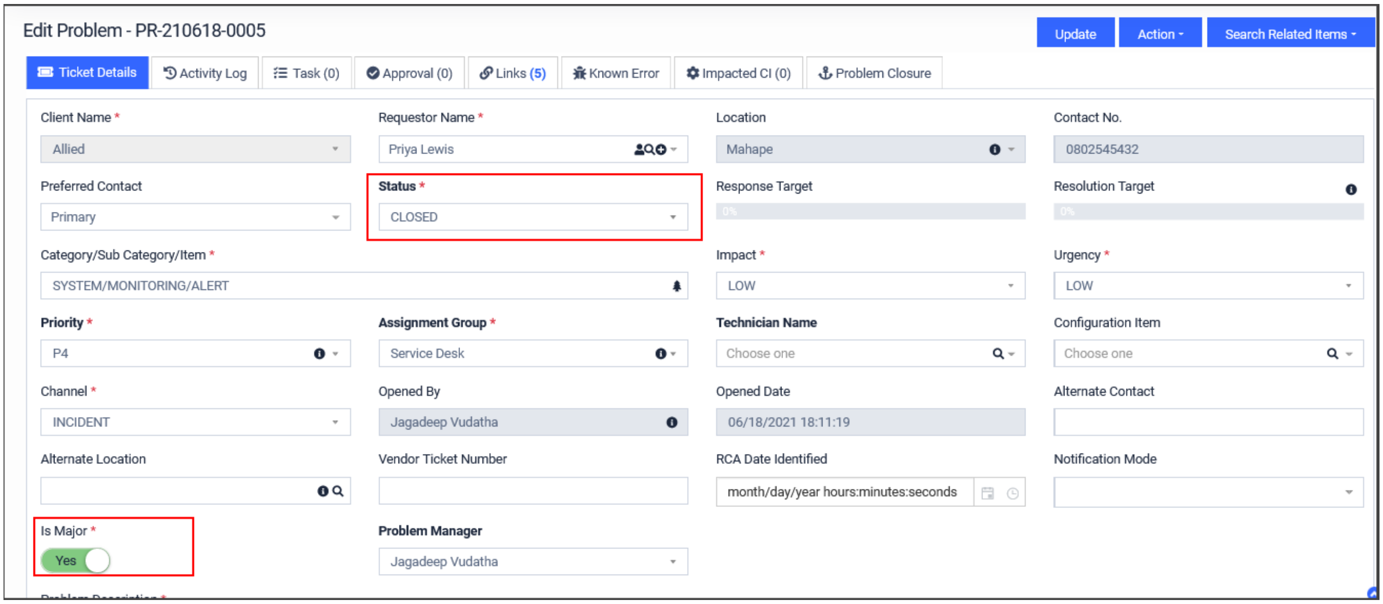


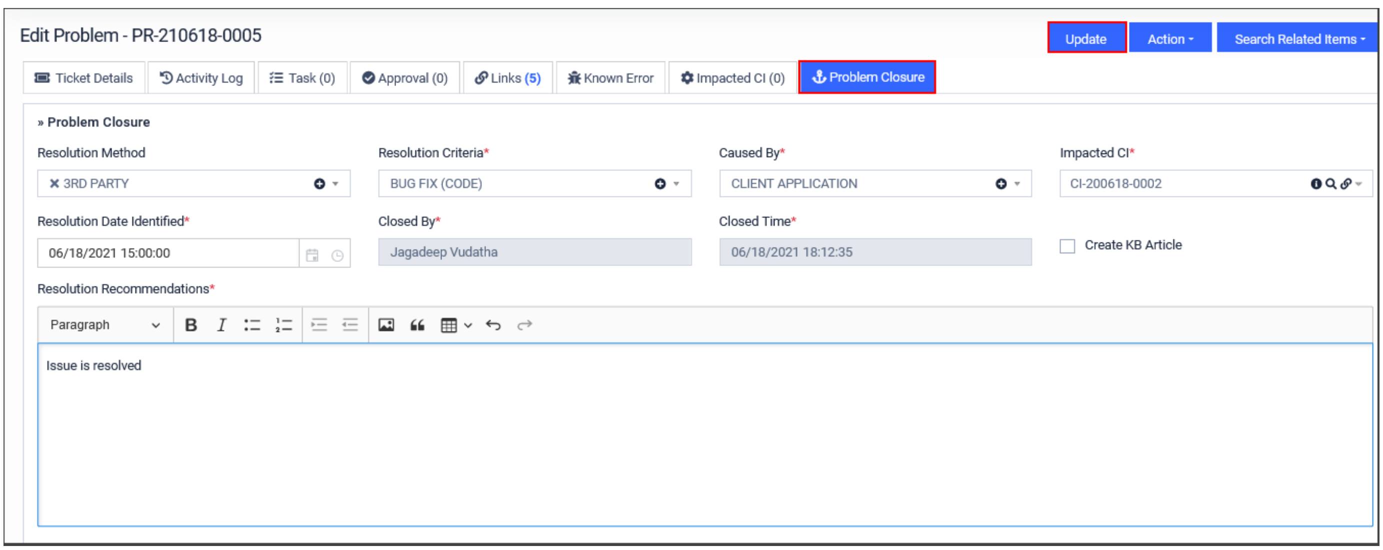


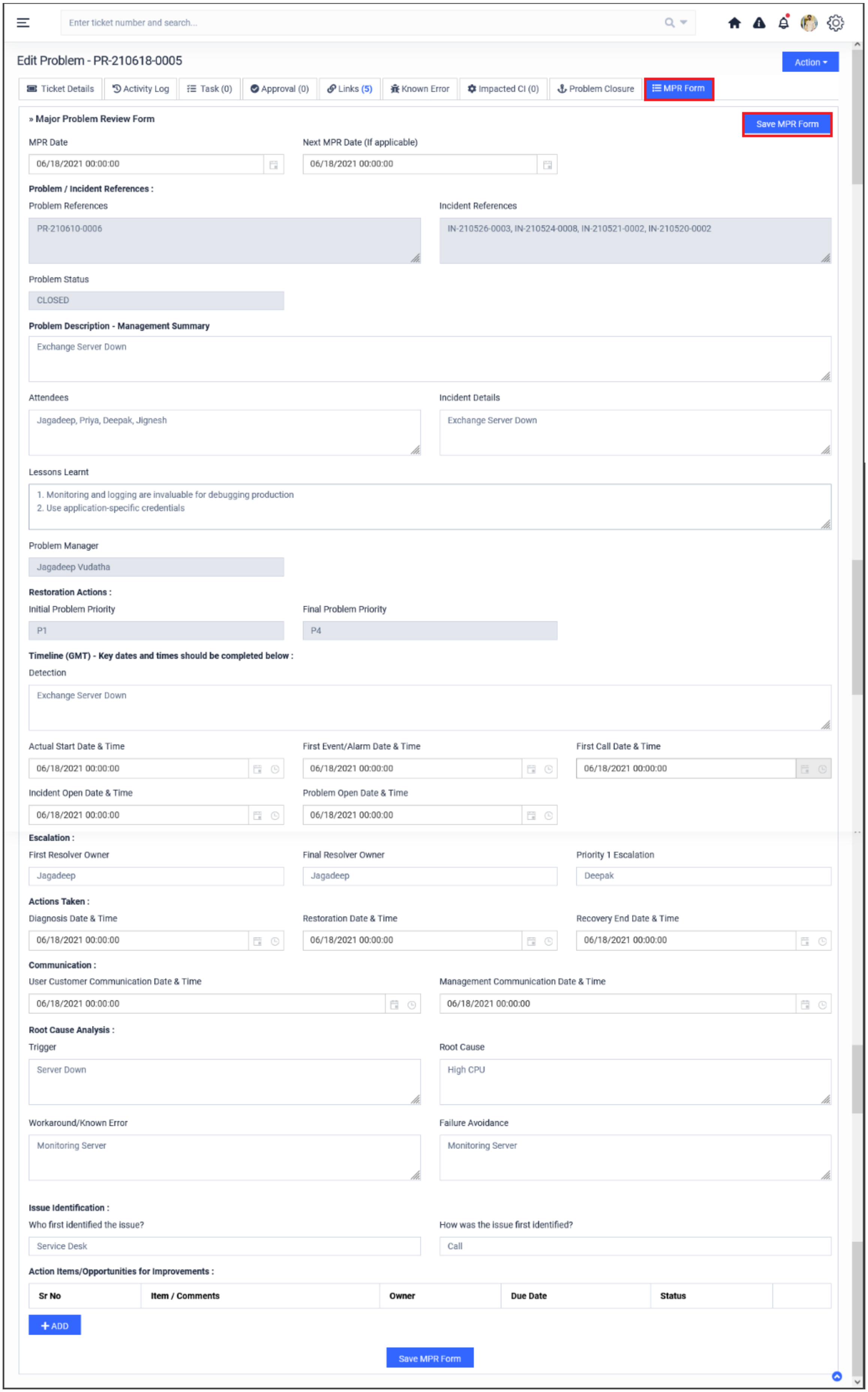
All major problems can be easily found under Major Problems.



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
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
06/18/2021 18:11:19
Alternate Contact
Alternate Location
Vendor Ticket Number
RCA Date Identified
month/day/year hours:minutes:seconds
Notification Mode
Is Major *
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
Create KB Article
Resolution Recommendations*
Paragraph
Issue is resolved



Enter ticket number and search...

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

» Major Problem Review Form

Save MPR Form

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

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: P1

Final Problem Priority: P4

Timeline (GMT) - Key dates and times should be completed below :

Detection: Exchange Server Down

Actual Start Date & Time: 06/18/2021 00:00:00

First Event/Alarm Date & Time: 06/18/2021 00:00:00

First Call Date & Time: 06/18/2021 00:00:00

Incident Open Date & Time: 06/18/2021 00:00:00

Problem Open Date & Time: 06/18/2021 00:00:00

Escalation :

First Resolver Owner: Jagadeep

Final Resolver Owner: Jagadeep

Priority 1 Escalation: Deepak

Actions Taken :

Diagnosis Date & Time: 06/18/2021 00:00:00

Restoration Date & Time: 06/18/2021 00:00:00

Recovery End Date & Time: 06/18/2021 00:00:00

Communication :

User Customer Communication Date & Time: 06/18/2021 00:00:00

Management Communication Date & Time: 06/18/2021 00:00:00

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?: Service Desk

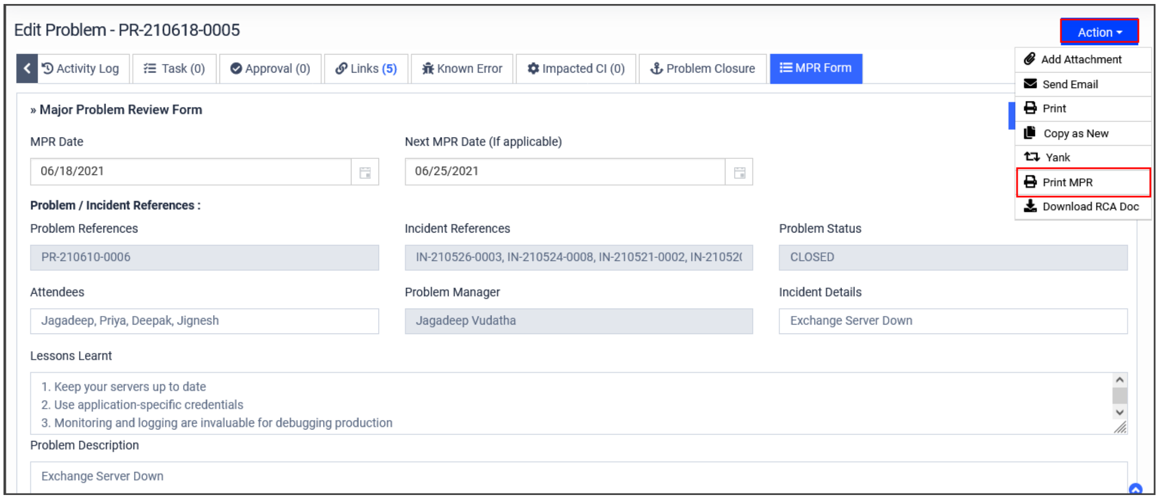
How was the issue first identified?: Call

Action Items/Opportunities for Improvements :

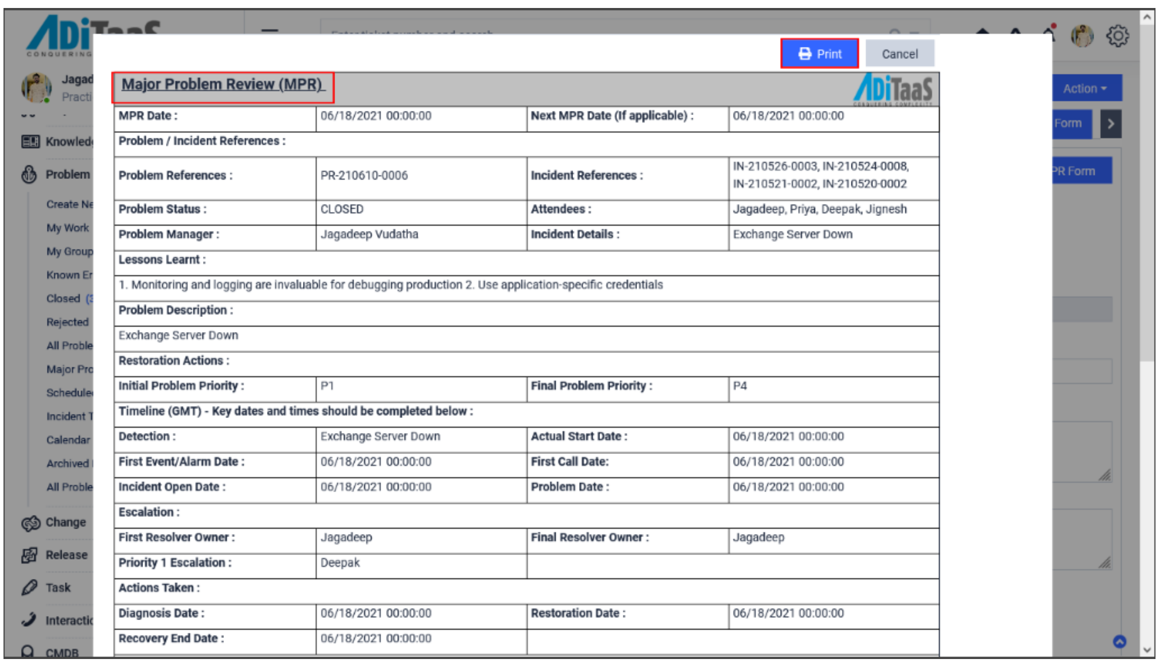
Sr No	Item / Comments	Owner	Due Date	Status

+ ADD

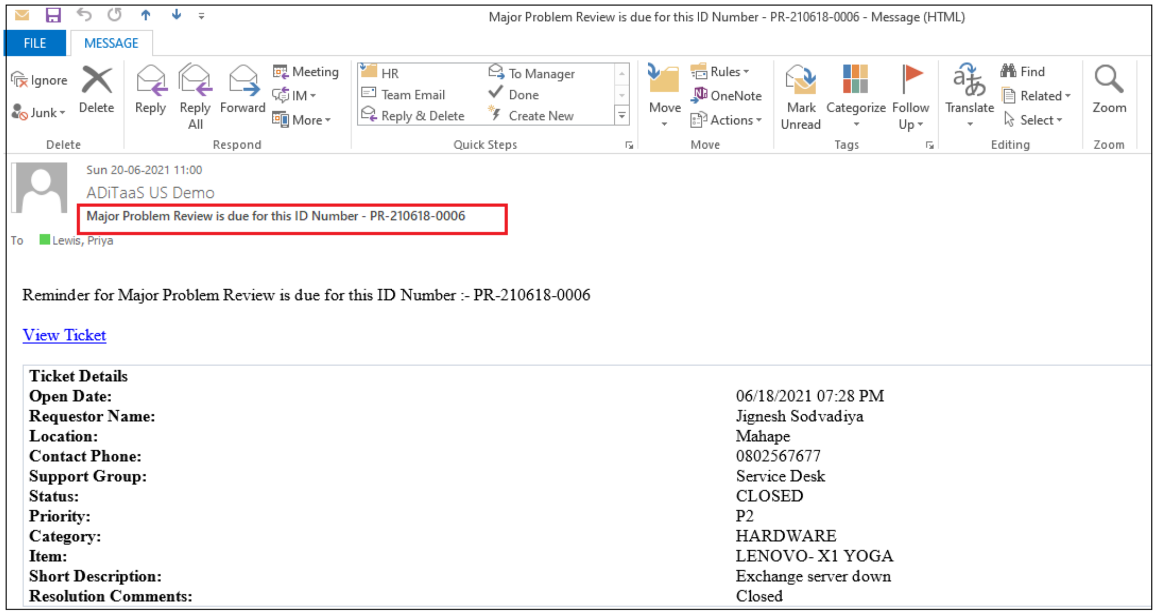
Save MPR Form



Once Major Problem Review form is saved. Form can be View/ Print/Download under **Action → Print MPR.**



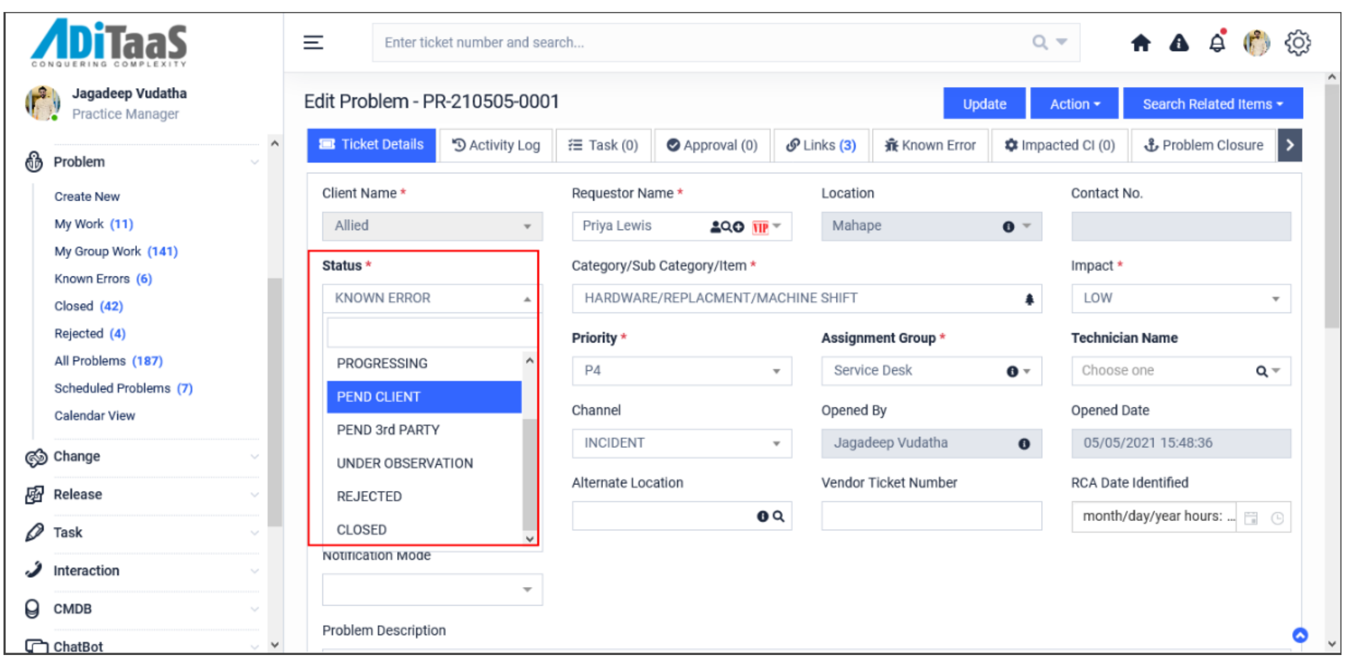
Auto reminder can be set from notification rule engine for remind to fill the MPR form once major problem is closed.



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.



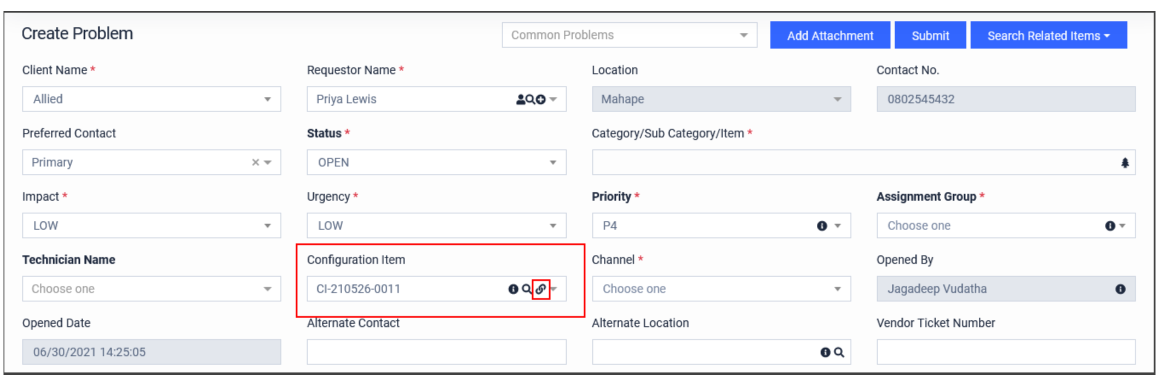
Below are the available statuses for problem record

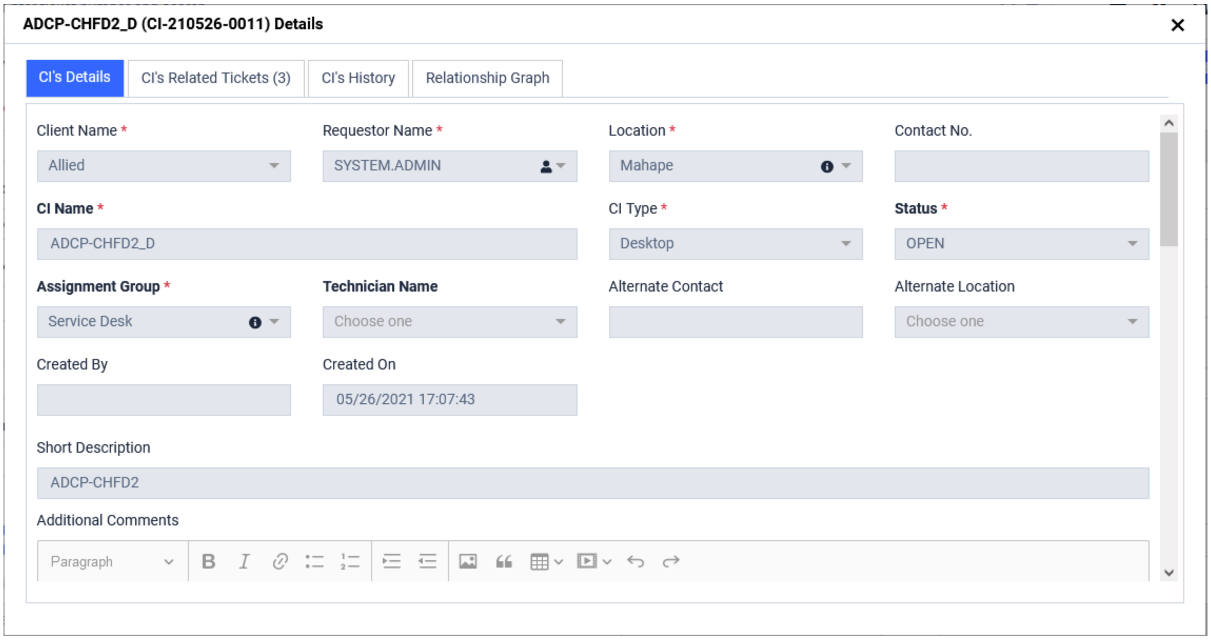
- **OPEN**': "This status is the default assignment value for all newly created problems, before they are assigned to a support group or individual for action".
- '**PROGRESSING**': "Change to this status, when you begin work on the Problem.
- '**PEND 3RDPARTY**': "Some type of action or information 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.

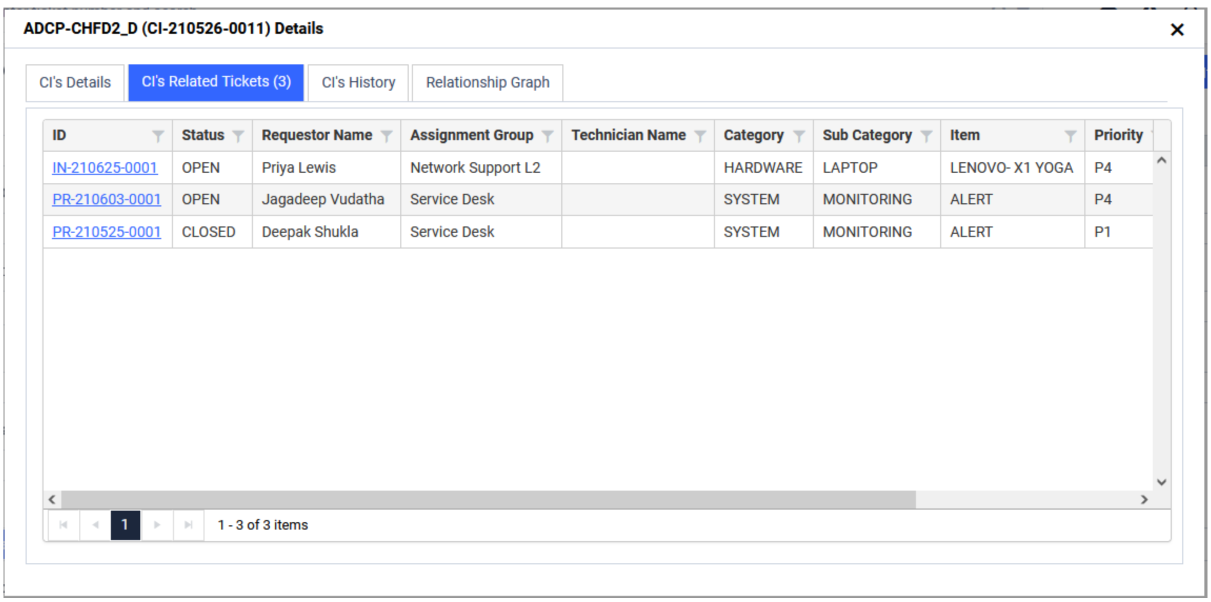
'Incident record can also auto close after defined period mentioned in notification rule engine.

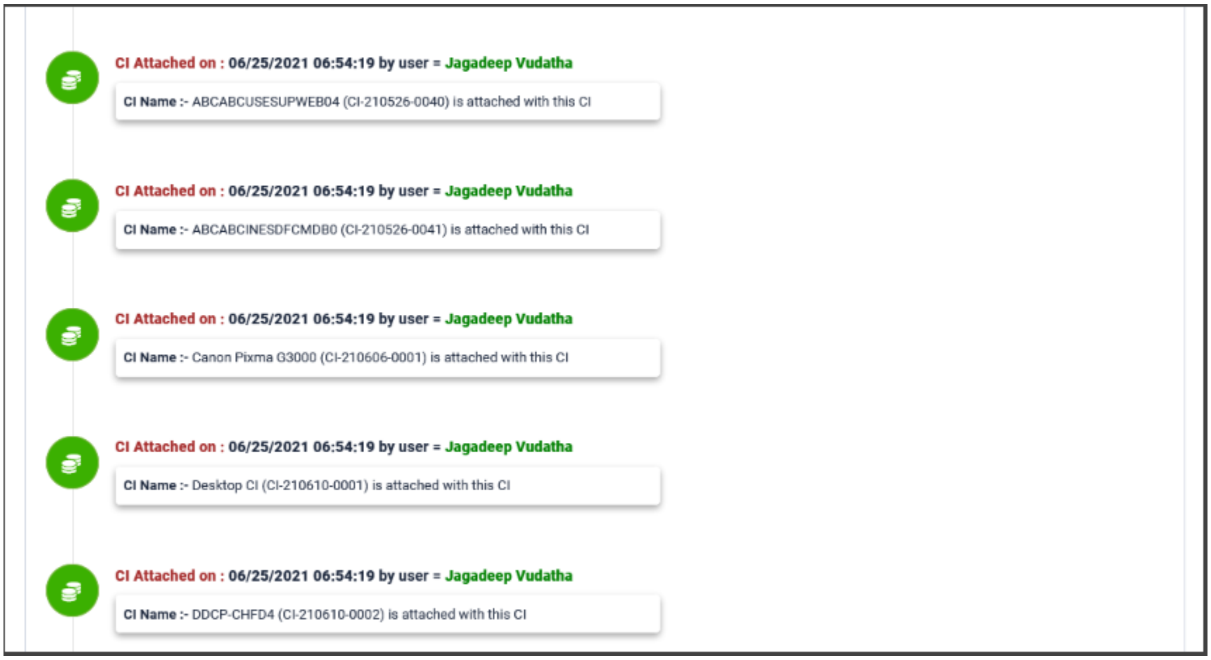
VIEW CI DETAILS FROM PROBLEM PAGE

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.

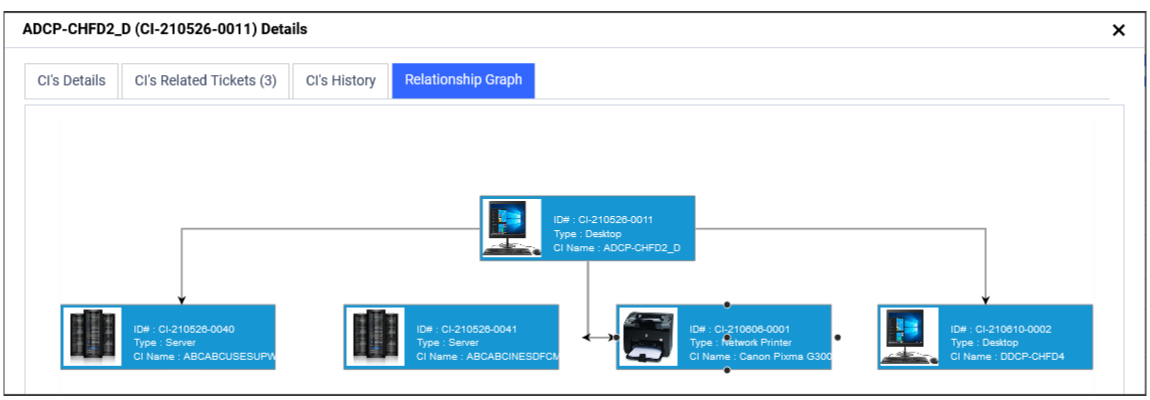


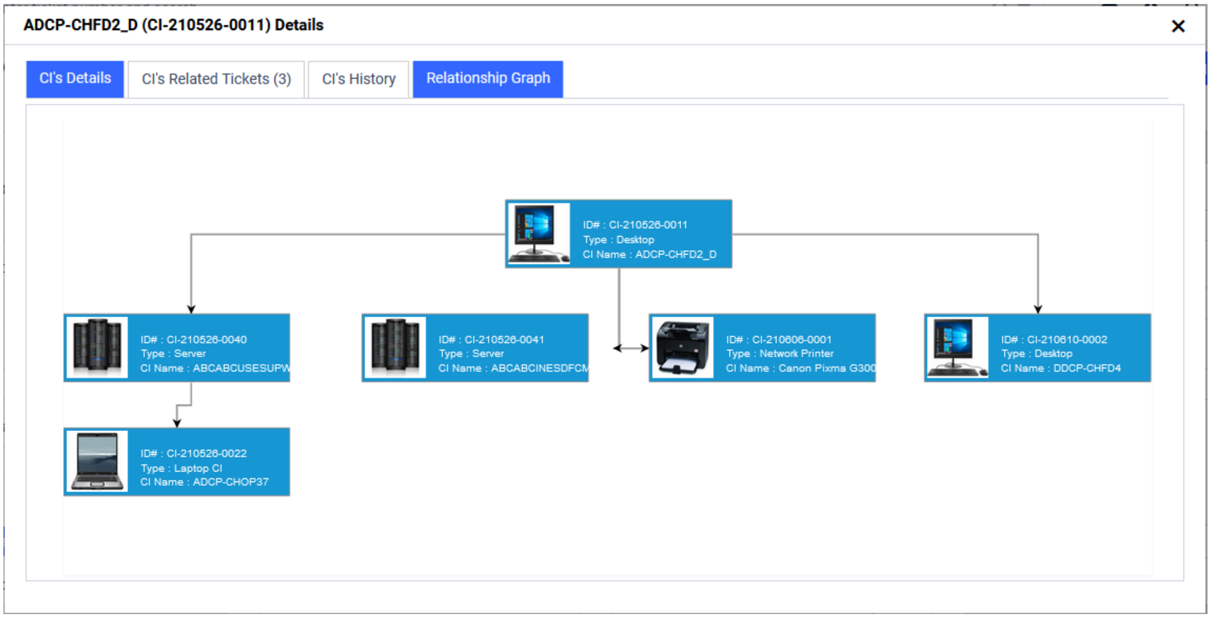

ADCP-CHFD2_D (CI-210526-0011) Details
CI's Details
CI's Related Tickets (3)
CI's History
Relationship Graph
Client Name *
Allied
Requestor Name *
SYSTEM.ADMIN
Location *
Mahape
Contact No.
CI Name *
ADCP-CHFD2_D
CI Type *
Desktop
Status *
OPEN
Assignment Group *
Service Desk
Technician Name
Choose one
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
IN-210625-0001 OPEN Priya Lewis Network Support L2 HARDWARE LAPTOP LENOVO- X1 YOGA P4
PR-210603-0001 OPEN Jagadeep Vudatha Service Desk SYSTEM MONITORING ALERT P4
PR-210525-0001 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 :- 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

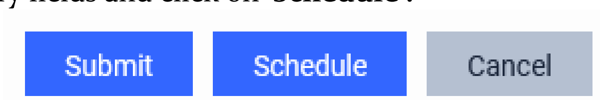

ADCP-CHFD2_D (CI-210526-0011) Details
CI's Details
CI's Related Tickets (3)
CI's History
Relationship Graph
ID# : CI-210526-0011
Type : Desktop
CI Name : ADCP-CHFD2_D
ID# : CI-210526-0040
Type : Server
CI Name : ABCABCUSESUPW
ID# : CI-210526-0041
Type : Server
CI Name : ABCABCINESDFCM
ID# : CI-210606-0001
Type : Network Printer
CI Name : Canon Pixma G300
ID# : CI-210610-0002
Type : Desktop
CI Name : DDCP-CHFD4



SCHEDULED PROBLEMS

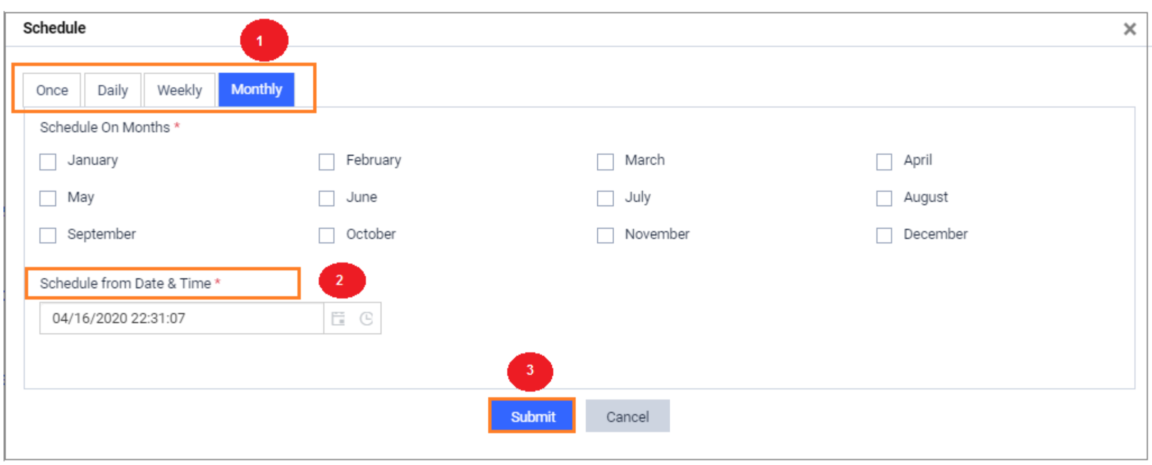
Create Scheduled Problem- Scheduled ticket functionality benefits when there are some activities need to be executed at regular intervals. Once a ticket is scheduled, new ticket will be created and assigned to the specified support group automatically at the scheduled interval.

1. Navigate to **Problem** Module and click on '**Create New**'
2. Fill all * marked mandatory fields and click on '**Schedule**'.



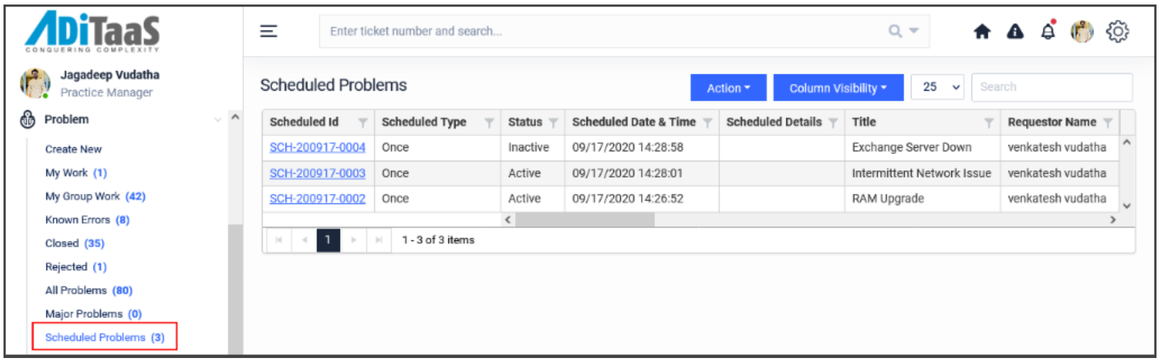
3.

4. Displays scheduled dialog 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**



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 helps 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**'.

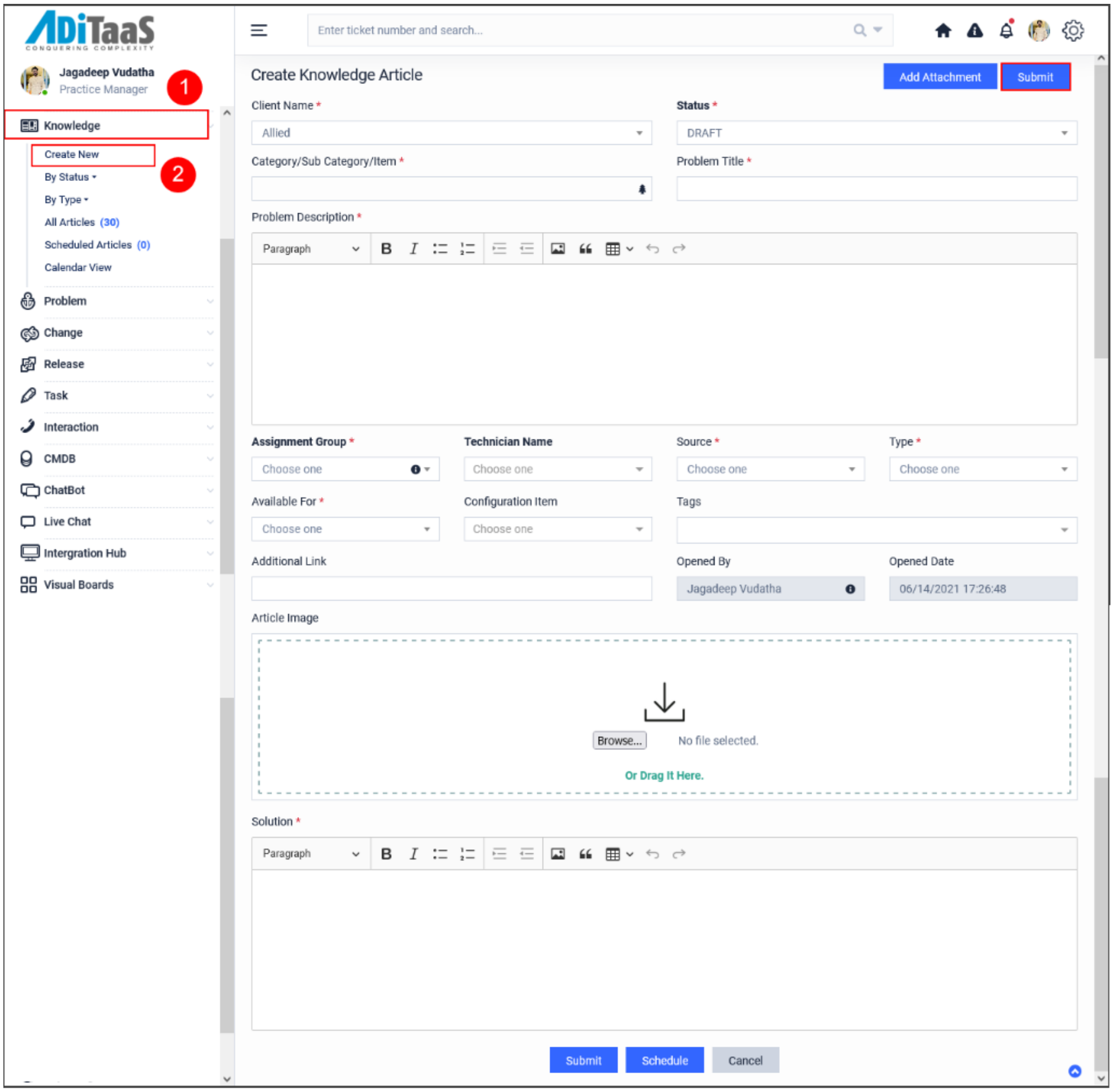
m. **Additional Link-** Optional field. Any related reference link can be added in this field**.**

n. **Opened Date:** System auto captures date and time when article is created.

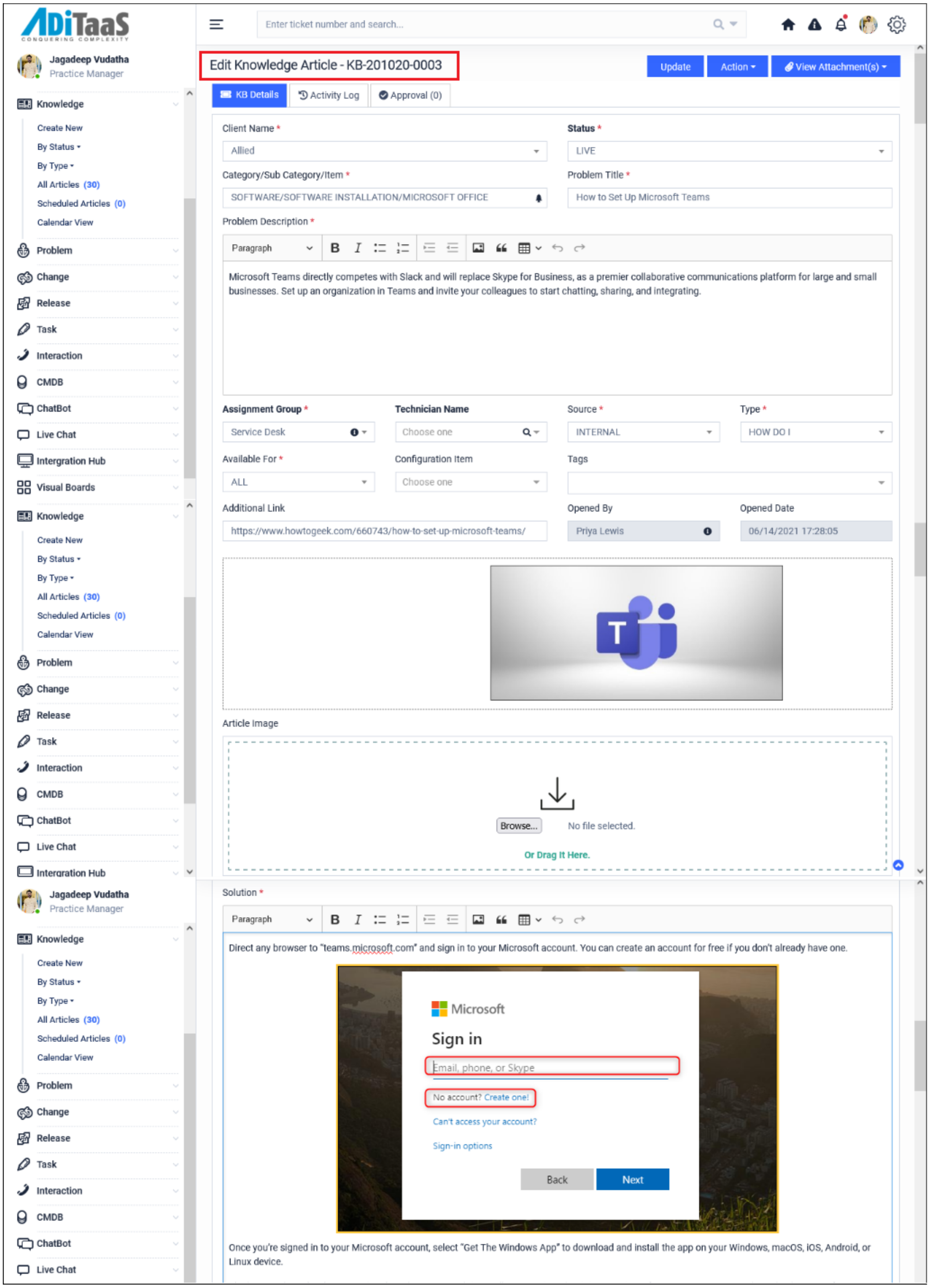
o. **Opened By:** System auto captures name of the agent/ end user who has created the article.

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



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**.

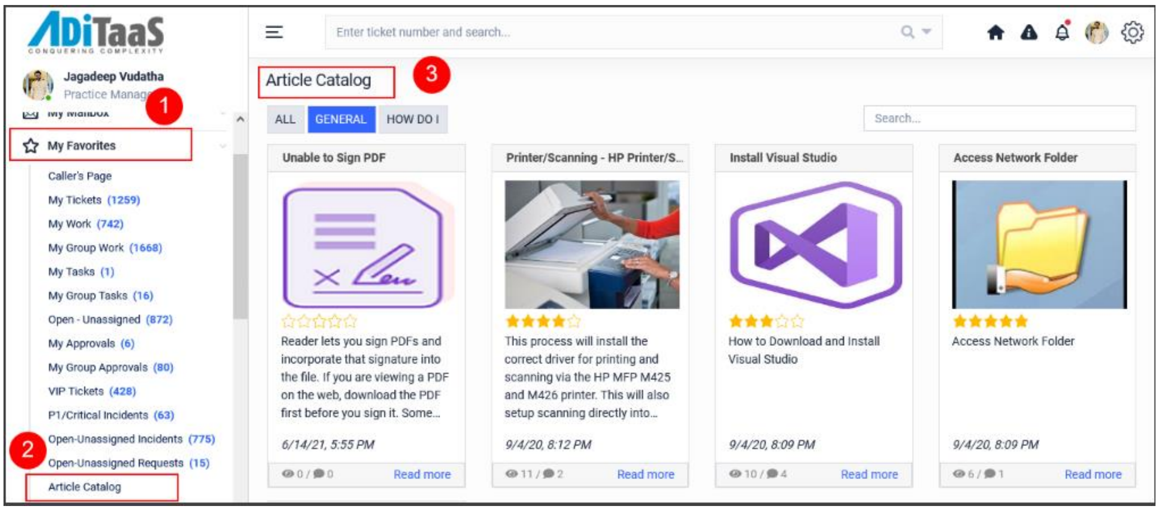

Edit Knowledge Article - KB-201020-0003
Update
Action
View Attachment(s)
KB Details
Activity Log
Approval (0)
Jagadeep Vudatha
Practice Manager
Knowledge
Create New
By Status
By Type
All Articles (30)
Scheduled Articles (0)
Calendar View
Problem
Change
Release
Task
Interaction
CMDB
ChatBot
Live Chat
Intergration Hub
Visual Boards
Client Name *
Allied
Status *
LIVE
Category/Sub Category/Item *
SOFTWARE/SOFTWARE INSTALLATION/MICROSOFT OFFICE
Problem Title *
How to Set Up Microsoft Teams
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.
Assignment Group *
Service Desk
Technician Name
Choose one
Source *
INTERNAL
Type *
HOW DO I
Available For *
ALL
Configuration Item
Choose one
Tags
Additional Link
https://www.howtogeek.com/660743/how-to-set-up-microsoft-teams/
Opened By
Priya Lewis
Opened Date
06/14/2021 17:28:05
Article Image
Browse...
No file selected.
Or Drag It Here.
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.
Microsoft
Sign in
Email, phone, or Skype
No account? Create one!
Can't access your account?
Sign-in options
Back
Next
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

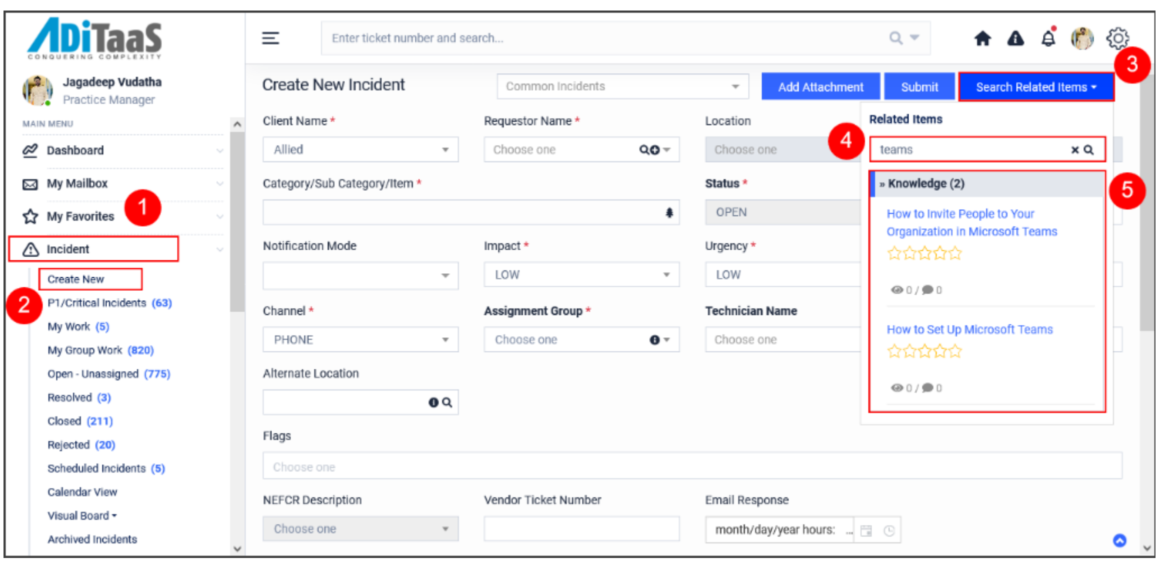
To make any article live, change article status to Live. Live article will be visible to agents and self- users.

VIEW ARTICLE

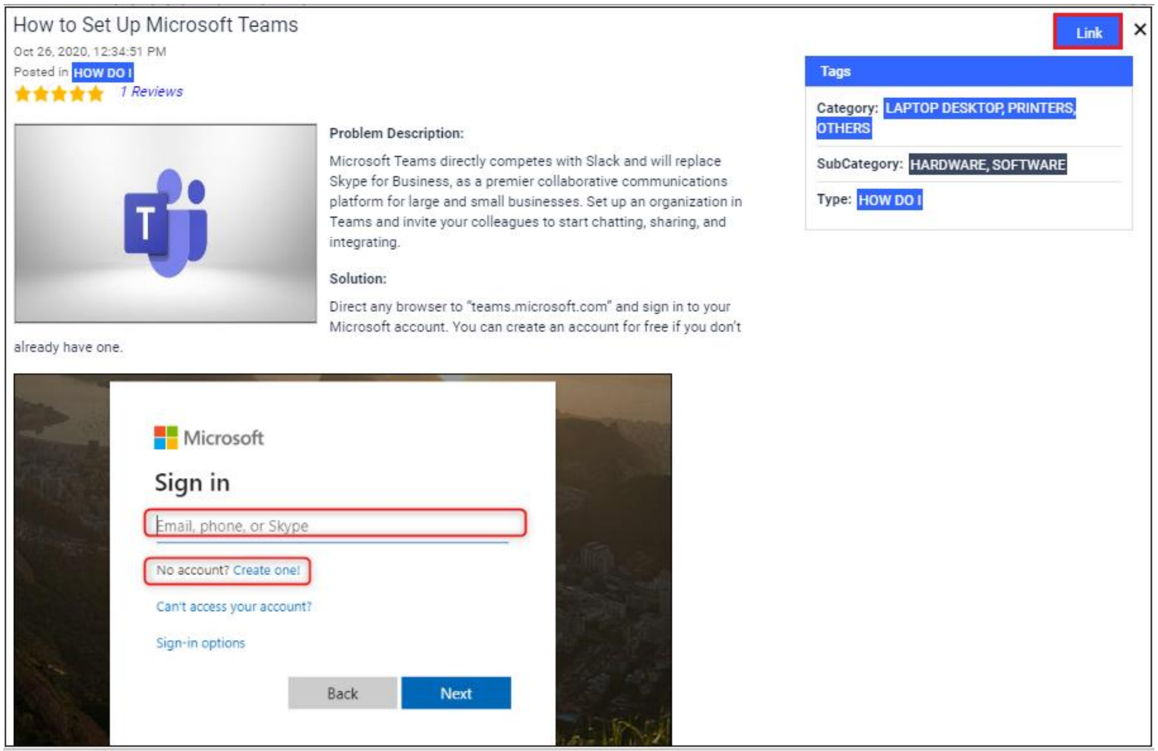
- Agents can view all article under **my favorites → Article Catalog**
- Particular articles can be search either by clicking on **Article Type** or using **Search** option



- 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.

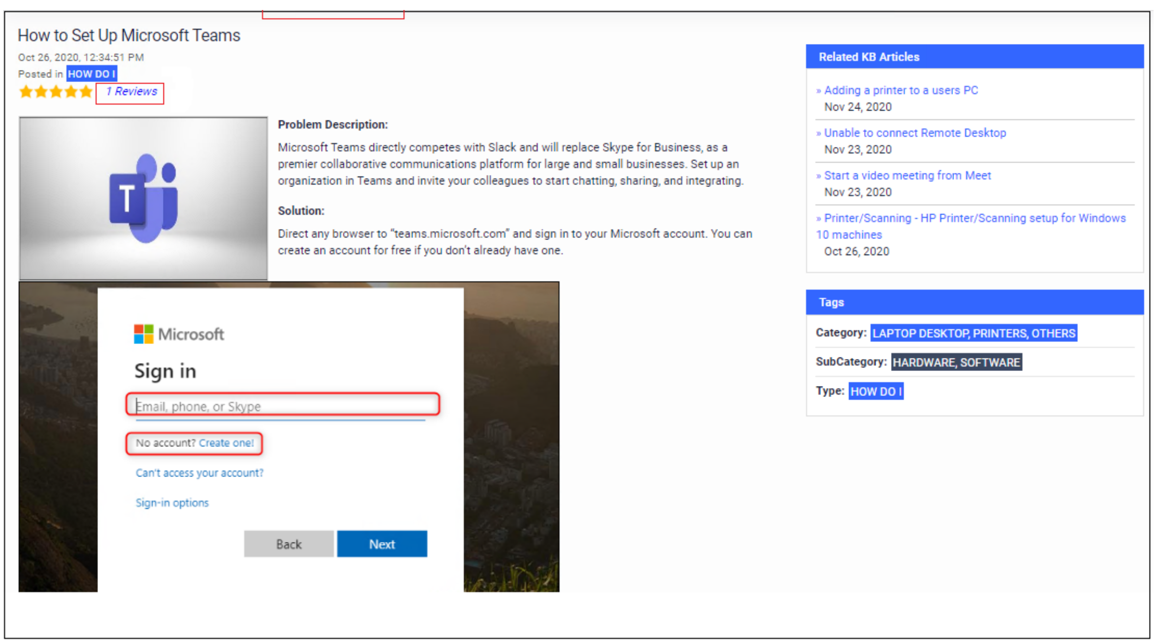


- View the article and click on **Link** to bond particular article to selected ticket.



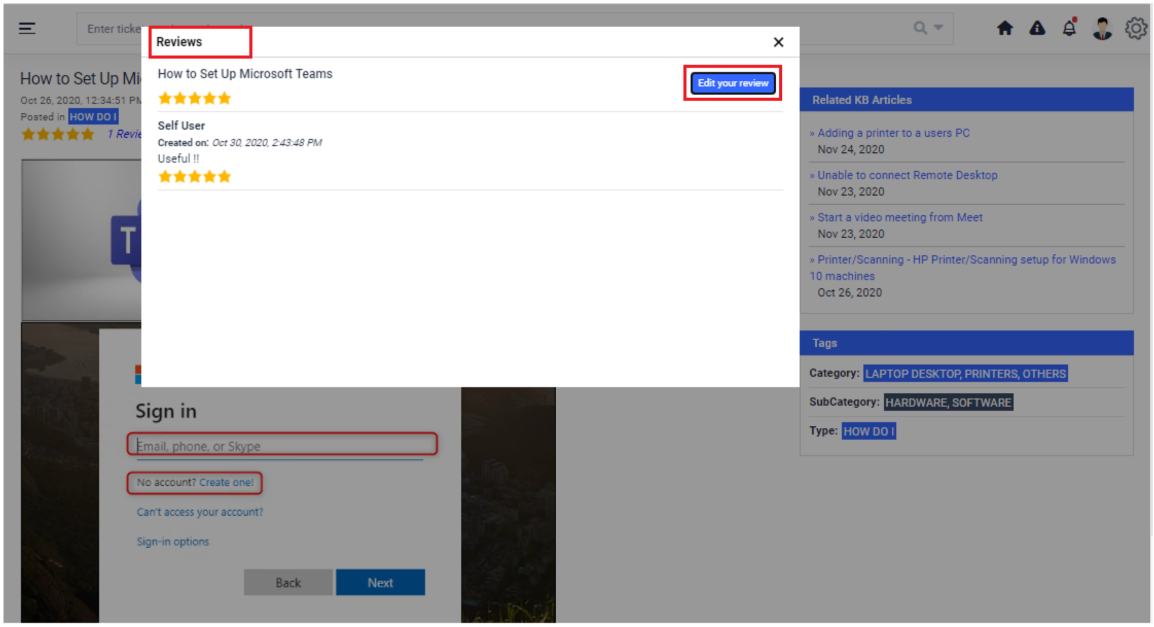
WRITE/ VIEW REVIEWS

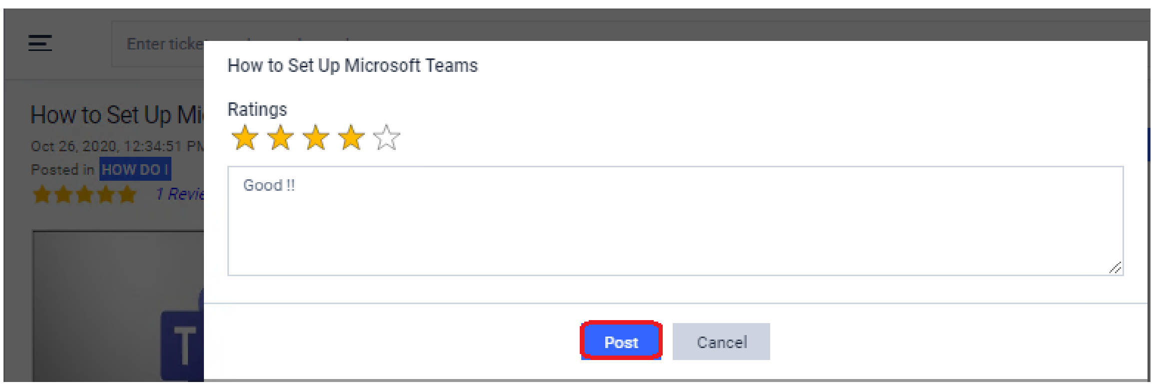
Click on **Reviews** to view the existing reviews.



1. To add/edit review, click on **Write/ Edit Review**
2. Provide rating by clicking on starts and provide feedback by writing in comment section.

3. Click on **POST**



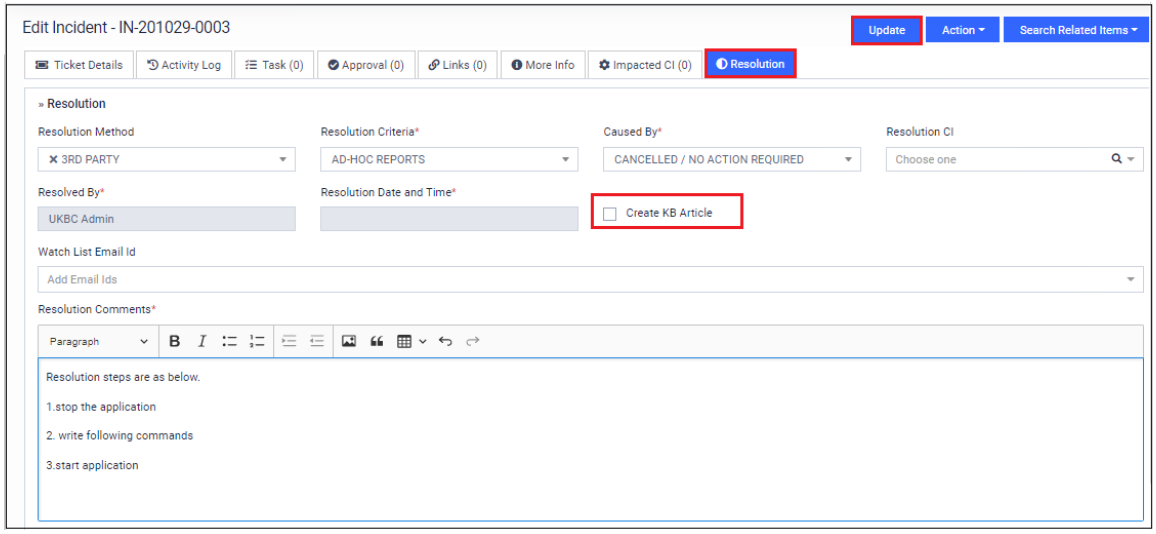


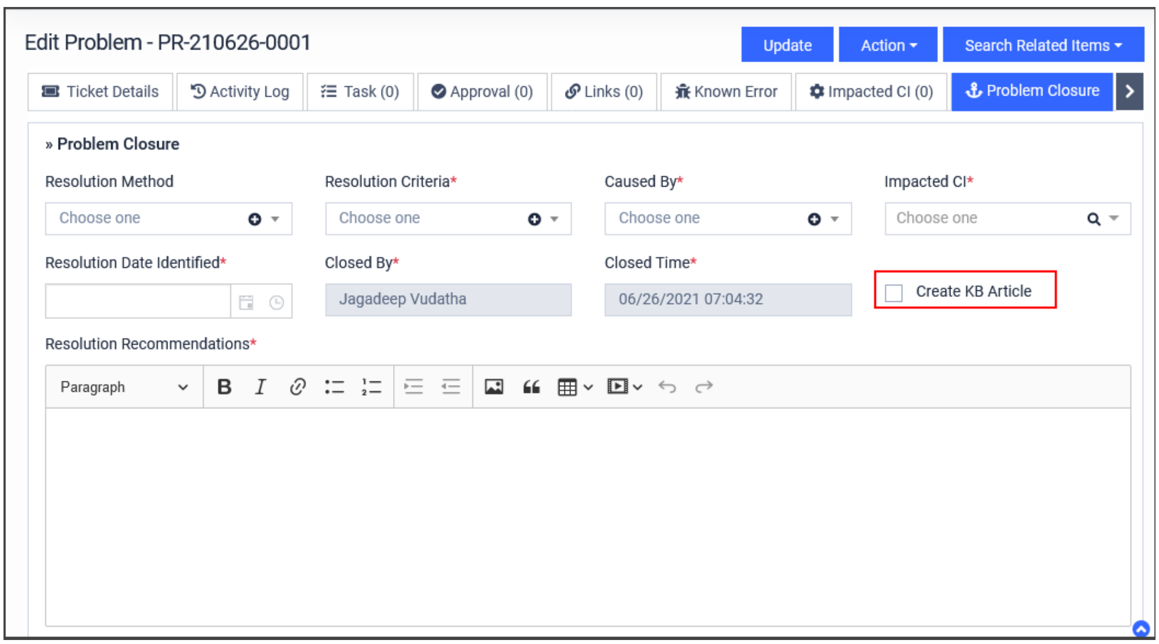
RETIRE ARTICLE

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.



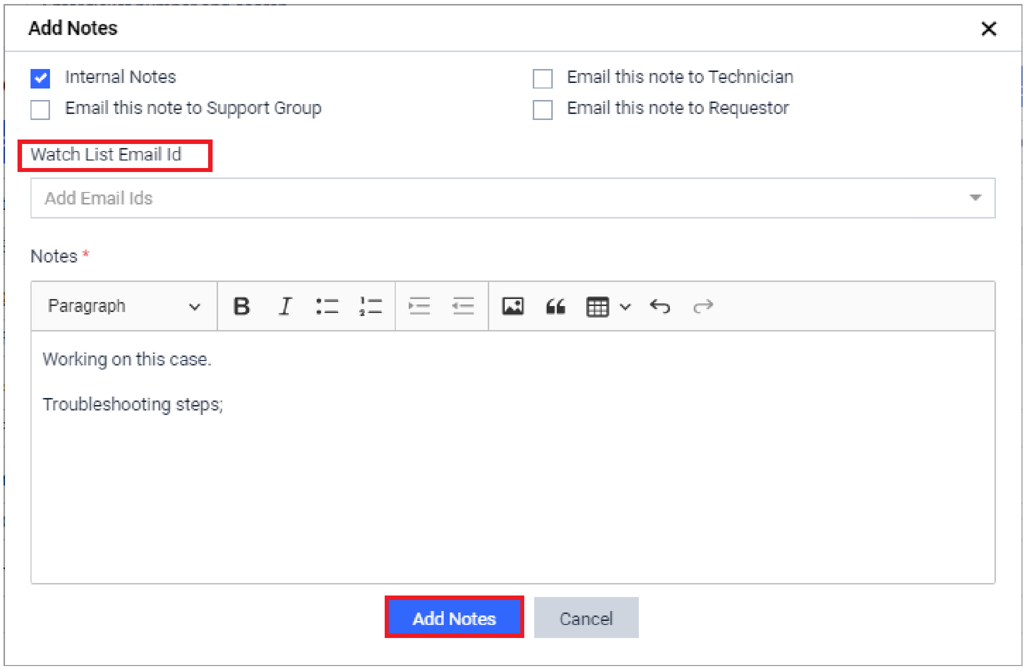


ADD NOTES

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.

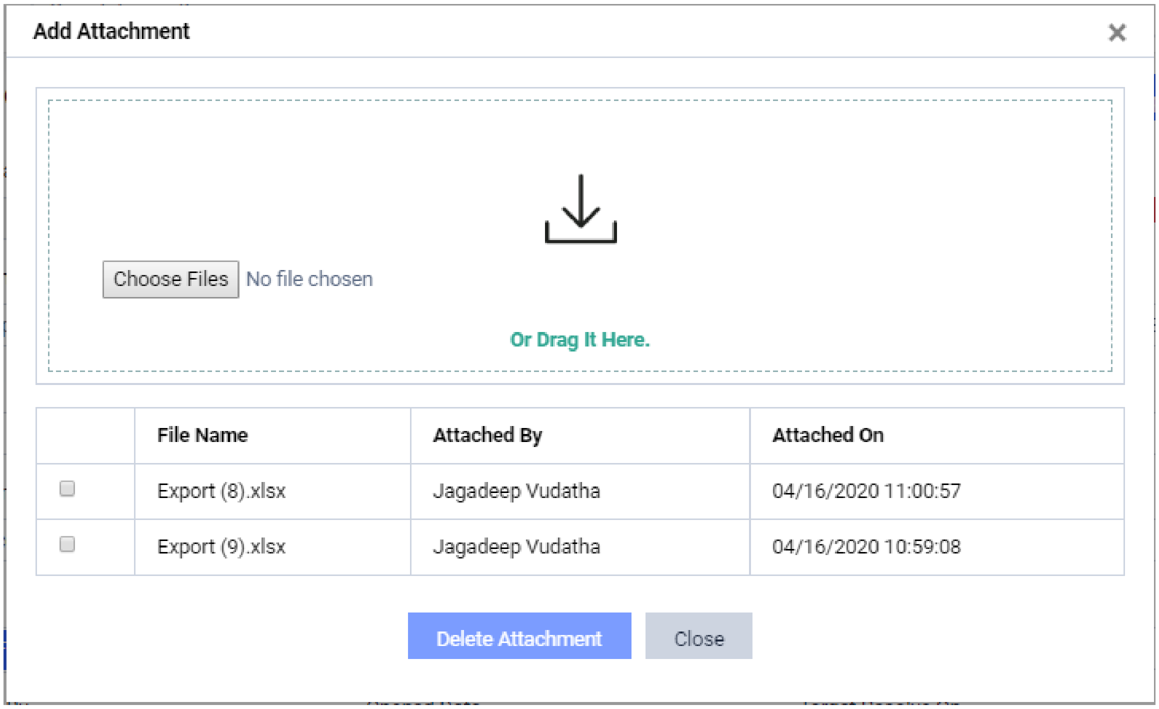
4. Enter the required comments/images/screenshots in the Notes section and click on **Add Notes.**



Added information will be visible in **Activity Log.**

ADD ATTACHMENT:

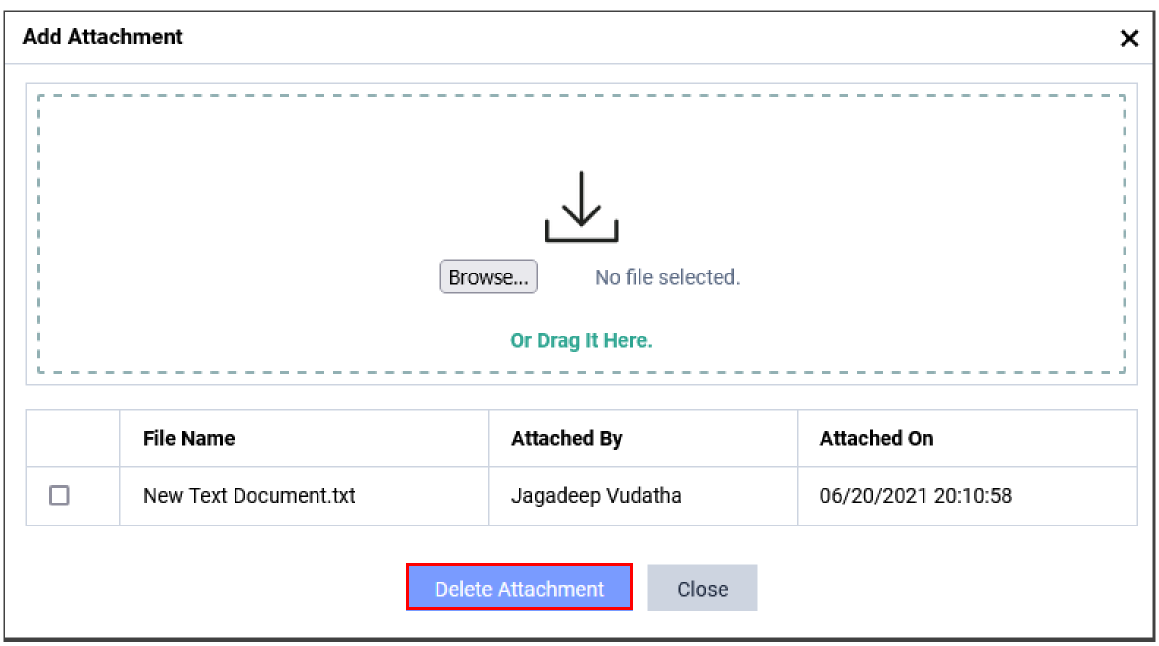
1. To add an attachment to a ticket, click on **Action → Add Attachment.**
2. On clicking will open up a new window.
3. From the file chooser window, choose the file to be attached or directly drag and drop the attachment to add.
4. Click open to upload the attachment.



All Uploaded attachments will be visible Under '**View Attachment**' tab.

DELETE/ REMOVE ATTACHMENT:

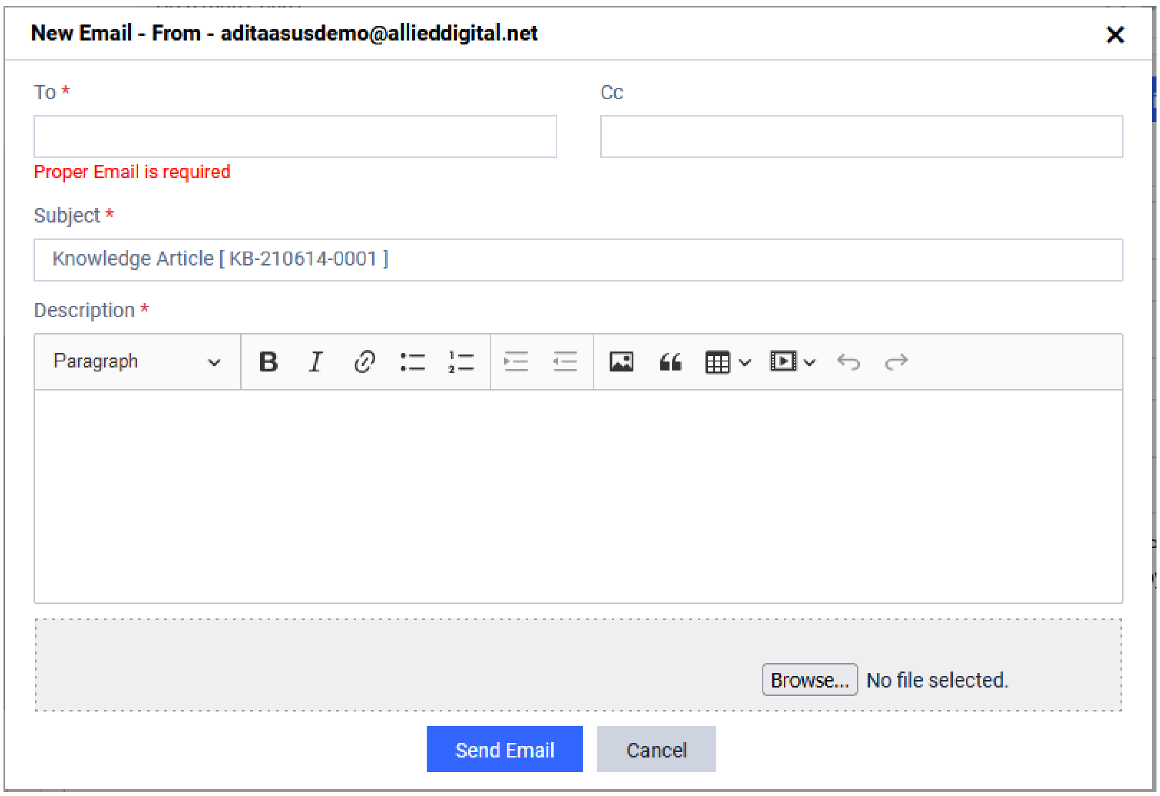
To remove an attachment, click on respective attached attachment from the "**Add Attachment**" window and click on '**Delete Attachment**'.



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

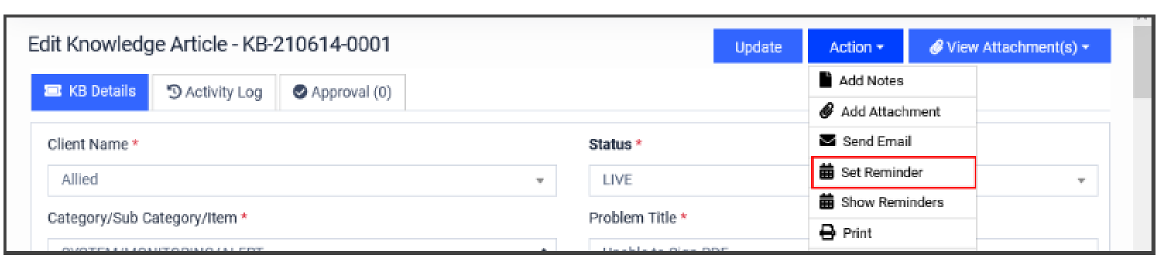
SEND MAIL:

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.



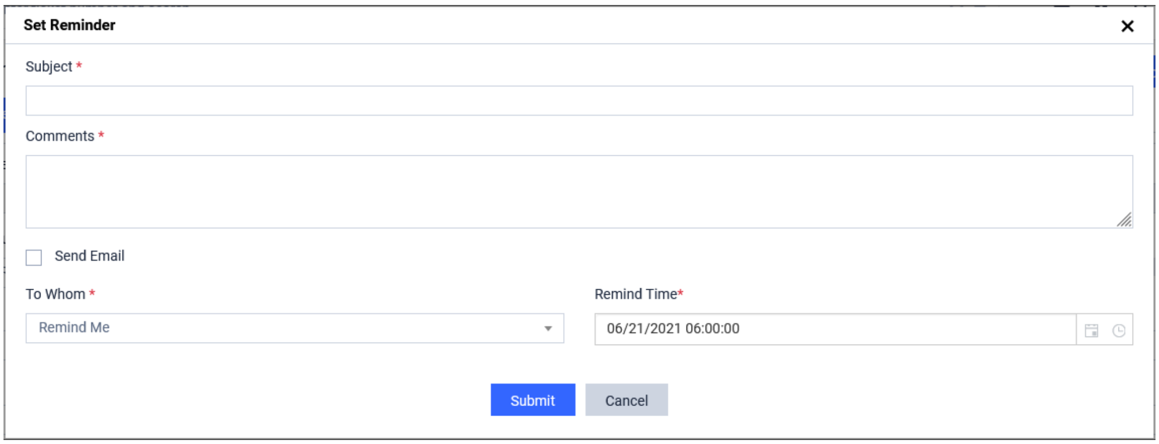
SET REMINDER

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.



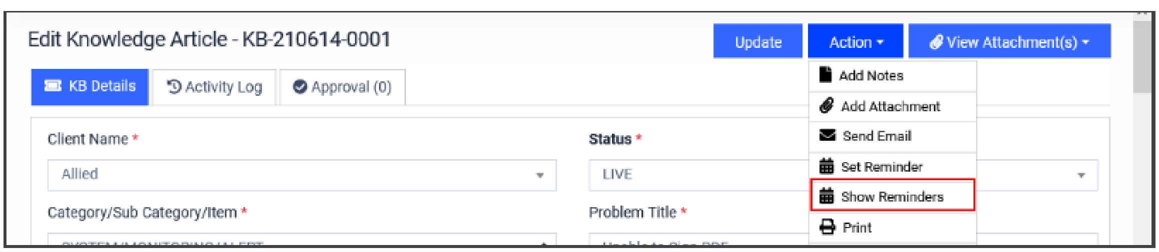
1. To a set reminder, click on **Action → Set Reminder.**

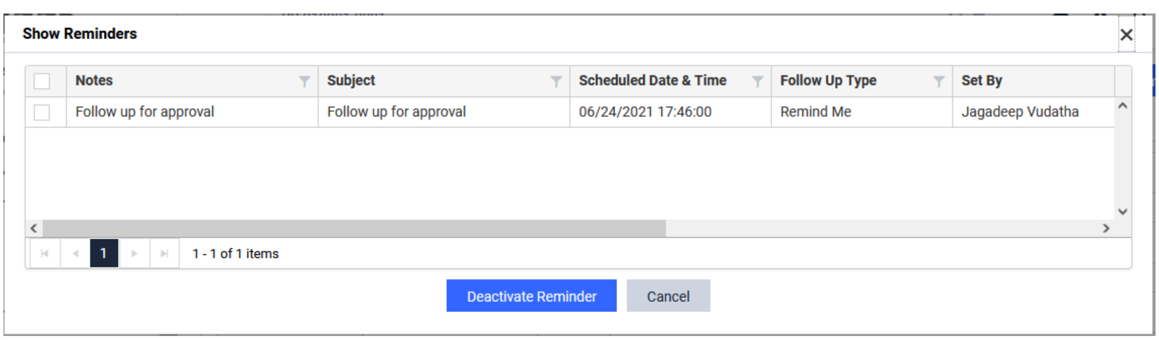
2. Set reminder dialog box is displayed. Enter the **Subject** and **Comments** in box.
3. Select checkbox, if required to send an email notification regarding the notification.
4. In select applicable option from '**To Whom**' drop down list.
    - **Remind me** – Reminder will be set for logged in 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.

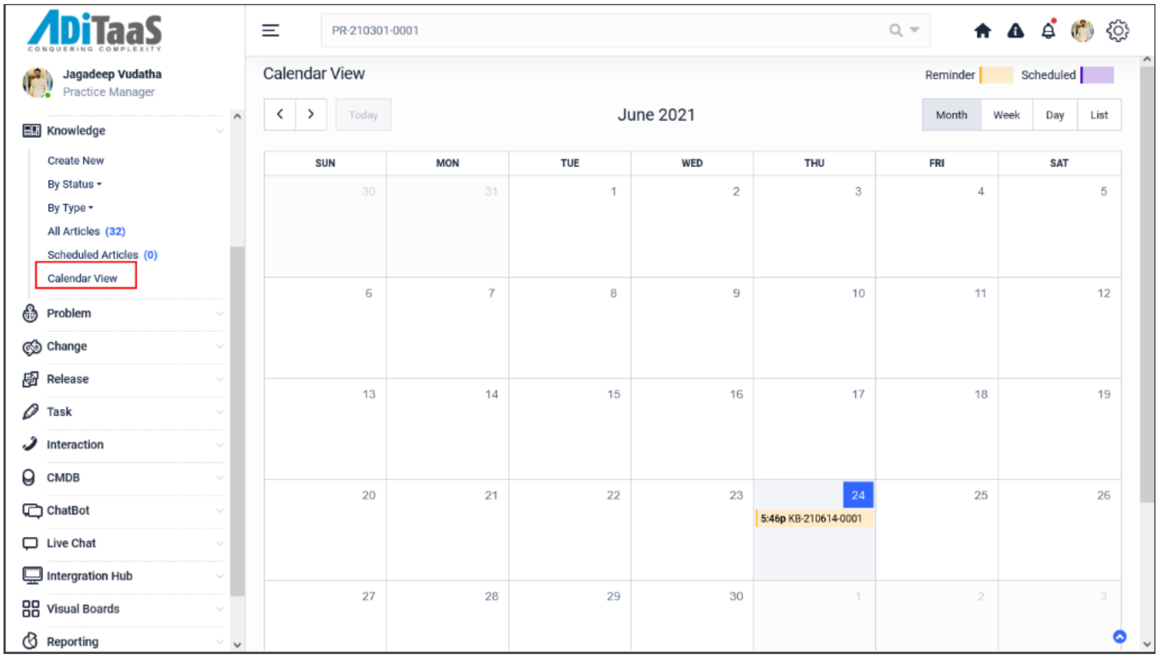


SHOW REMINDERS

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



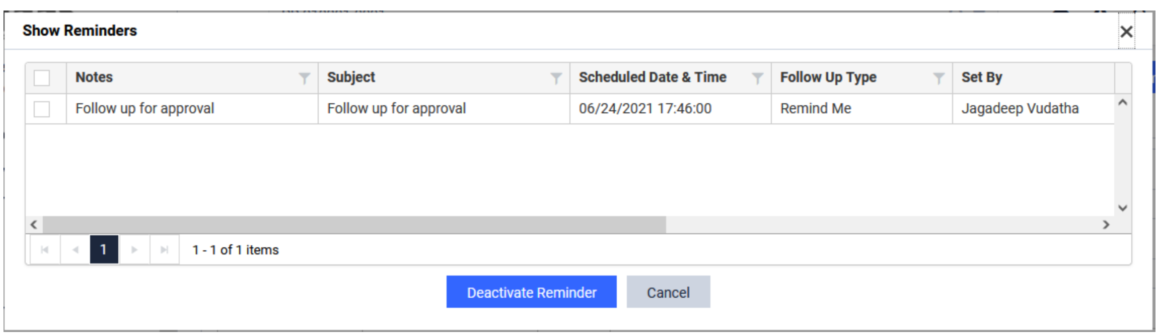




Deactivate the Reminder

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.



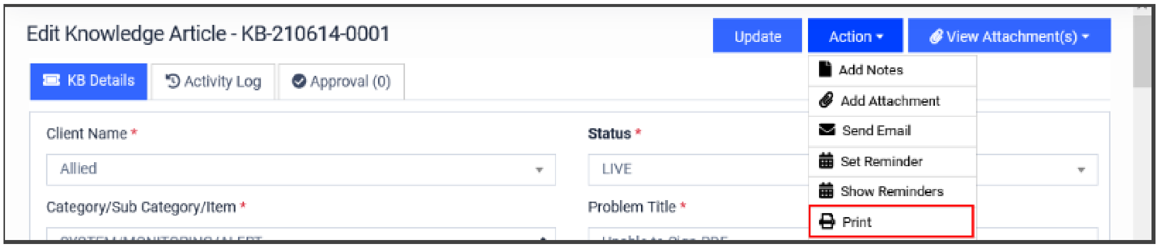
PRINT A KNOWLEDGE ARTICLE

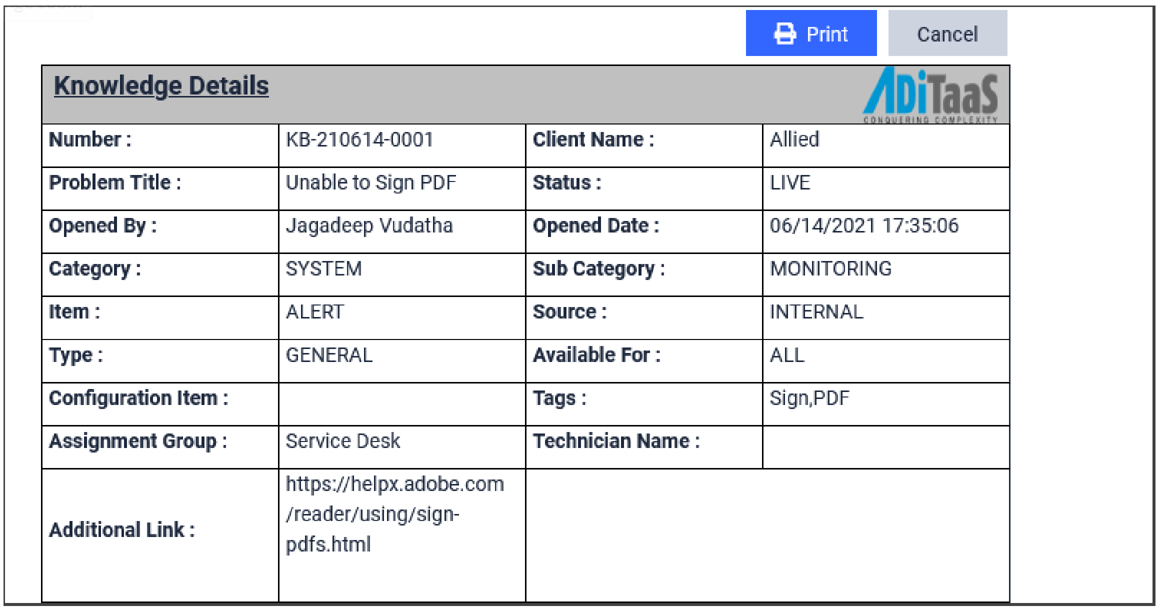
If you want to print an article, open required article need to be print,

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**



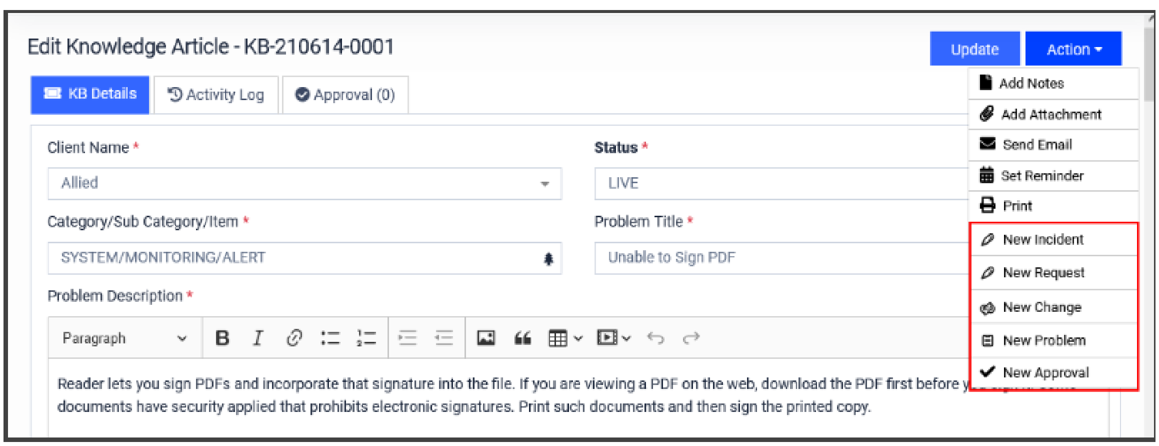


Knowledge Details

Number :	KB-210614-0001	**Client Name :**	Allied
Problem Title :	Unable to Sign PDF	**Status :**	LIVE
Opened By :	Jagadeep Vudatha	**Opened Date :**	06/14/2021 17:35:06
Category :	SYSTEM	**Sub Category :**	MONITORING
Item :	ALERT	**Source :**	INTERNAL
Type :	GENERAL	**Available For :**	ALL
Configuration Item :		**Tags :**	Sign,PDF
Assignment Group :	Service Desk	**Technician Name :**	
Additional Link :	https://helpx.adobe.com/reader/using/sign-pdfs.html		

QUICK LINKS TO CREATE TICKETS FROM KB ARTICLE

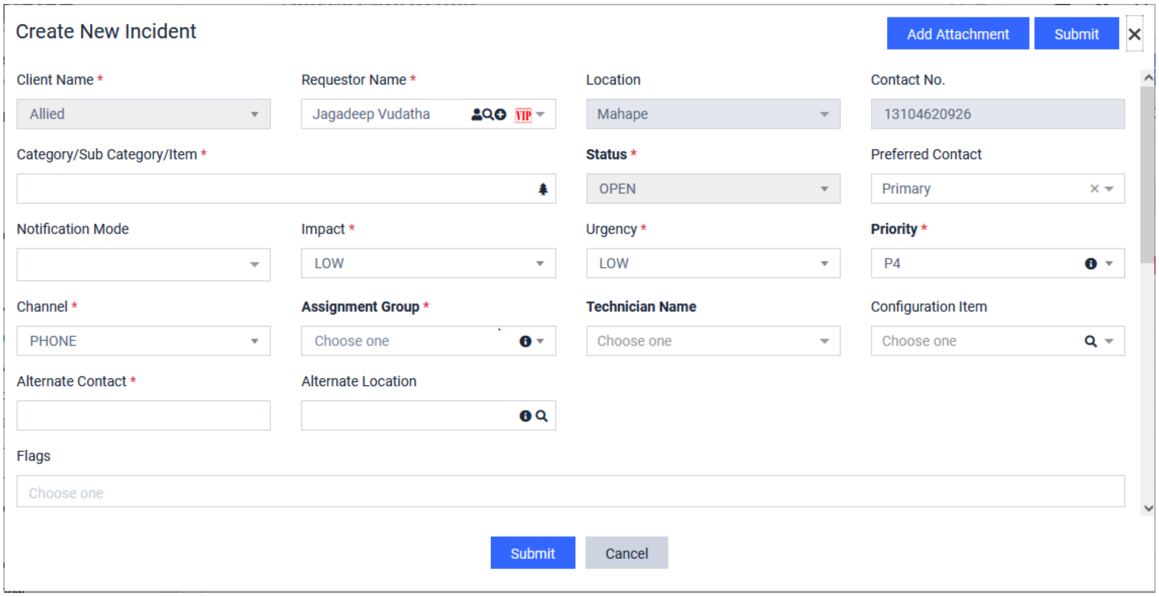
Following links helps to create other module tickets from article.



New Incident

Allows to raise a new incident ticket from knowledge article. Article will be linked to the Incident.

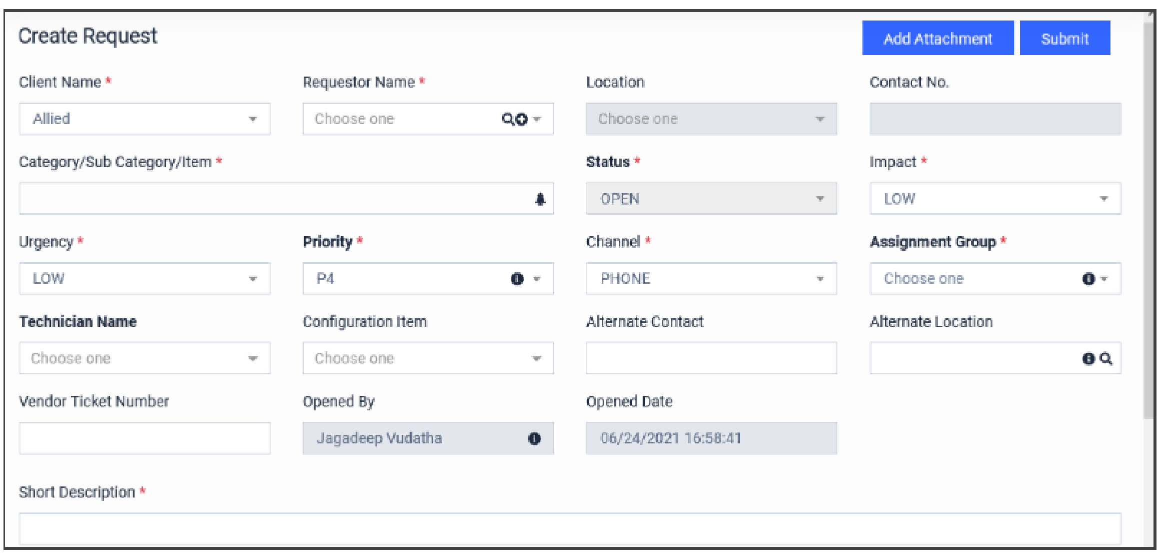
Go to **Action → New Incident**



New Request

Allows to raise a new request ticket from knowledge article. Article will be linked to the Request ticket.

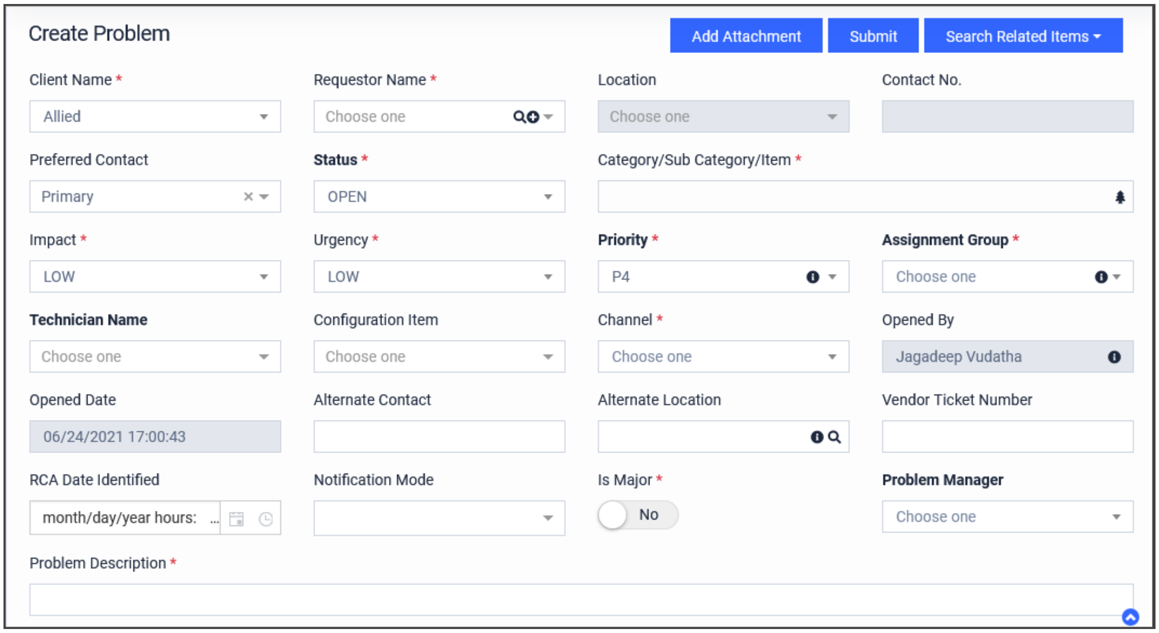
Go to **Action → New Request**



New Problem

Allows to raise a new problem ticket from knowledge article. Article will be linked to the problem ticket.

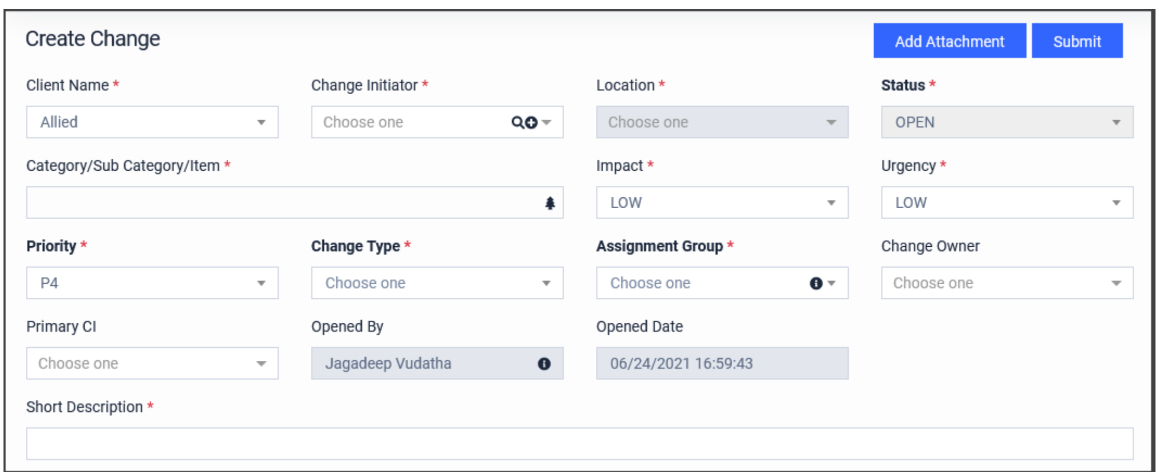
Go to **Action → New Problem**



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**



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.

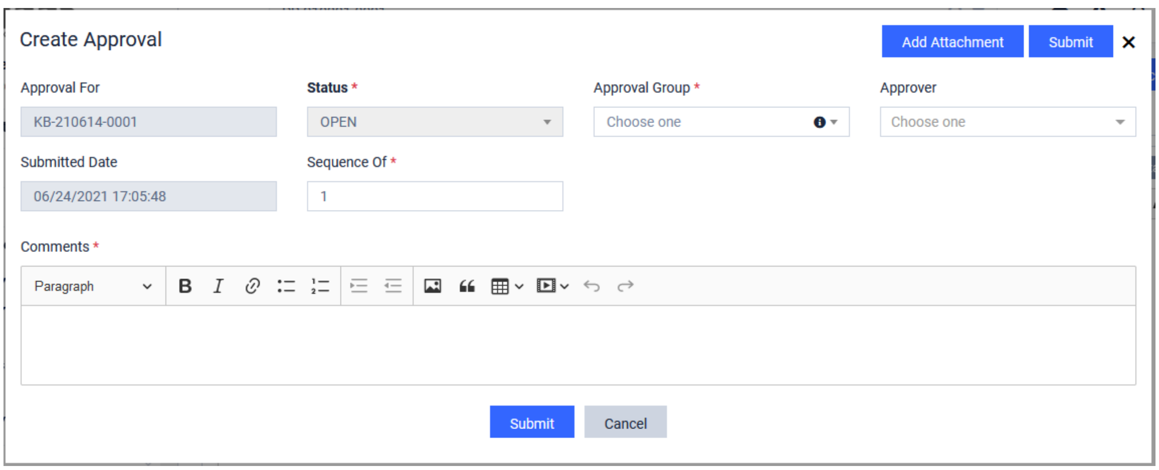
APPROVALS

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

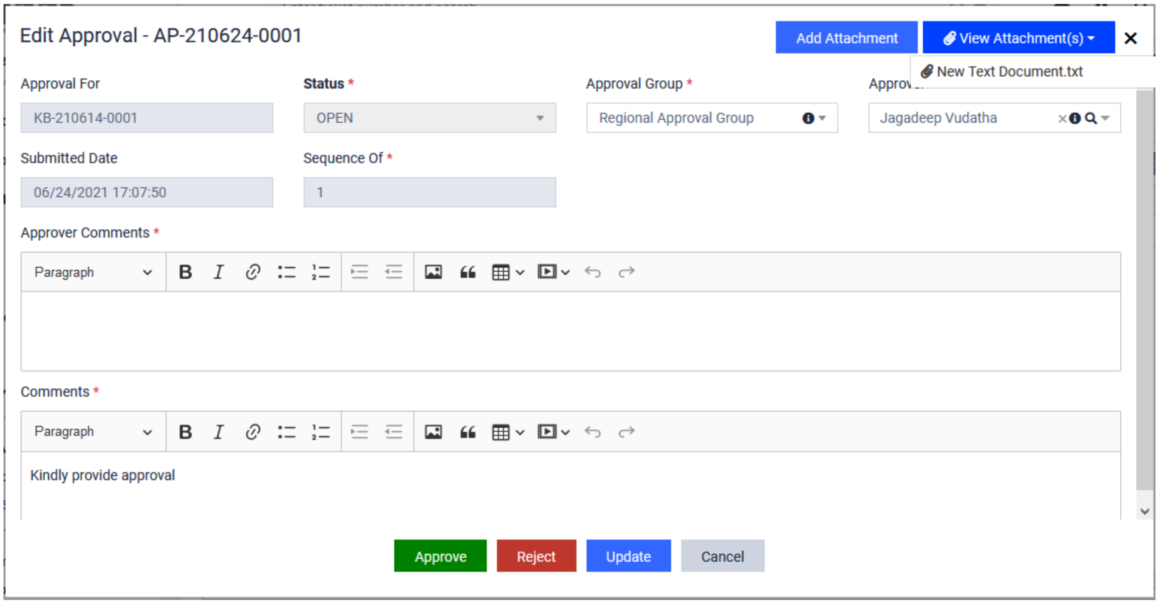
Create New

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.



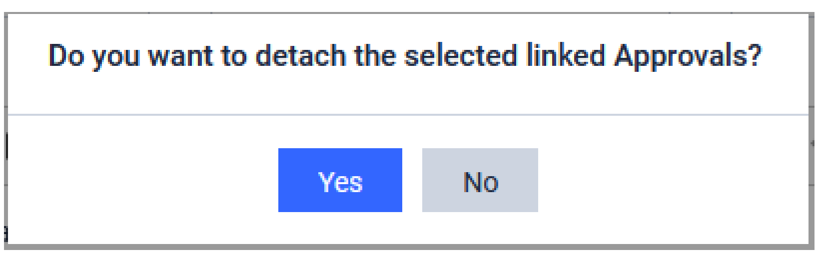
On submitting a request for approval, approver will receive an approval mail with a link to approve or reject the request.

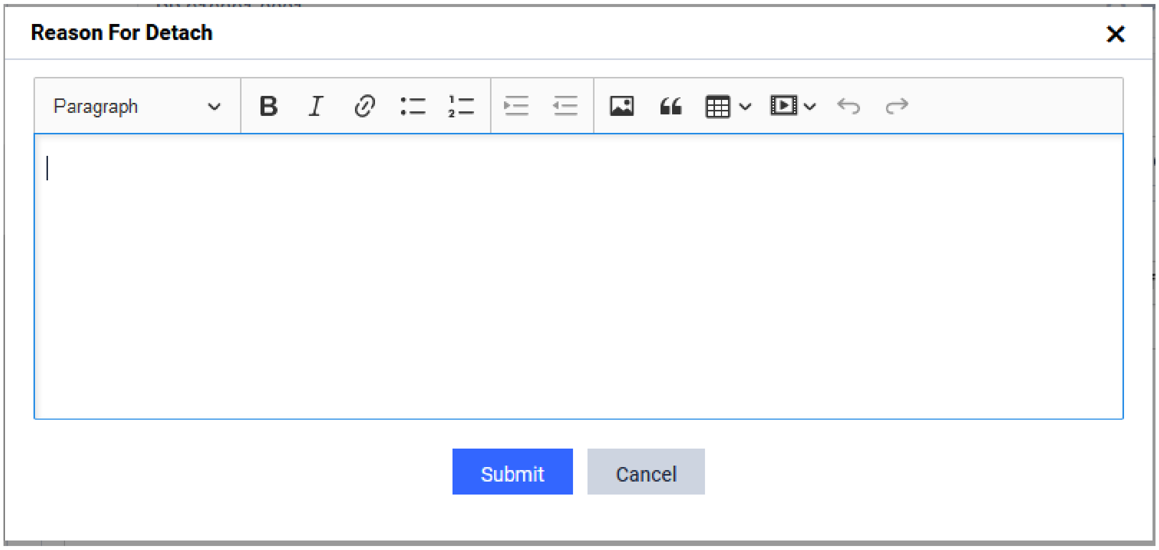


All linked approvals will visible under Approval Tab. If the logged in user is a managerial user, then he can open the approval and click on **Approve** or **Reject**.

Detach Approval

To detach any approval, click on '**Detach Approval**' and enter the reason for detach.





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.

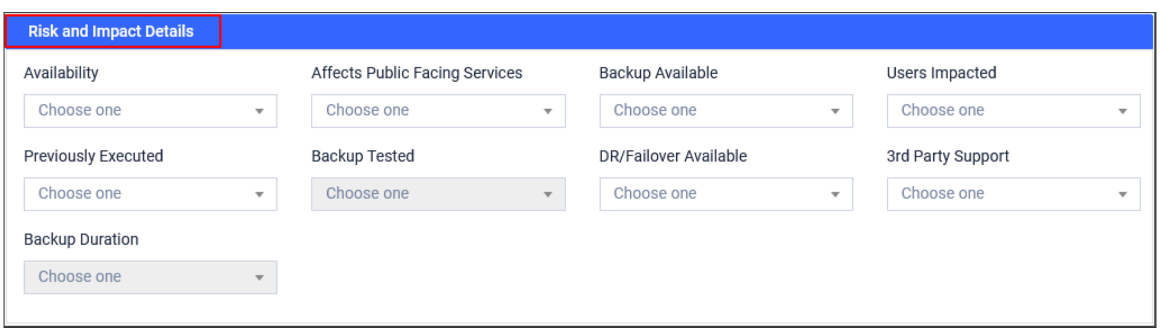
n. Opened By: System auto captures name of the agent/ end user who has created the change.

o. Short Description: Provide a relevant title to the change that will exactly summarize the change request.

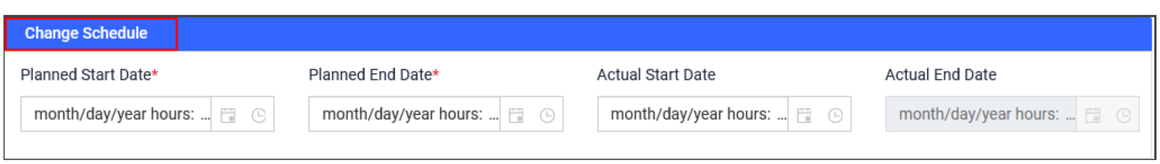
p. Change Description: Provide a detailed description with any other associated details relevant to the change.

q. Reason for change- Enter the reason for change implementation**.**

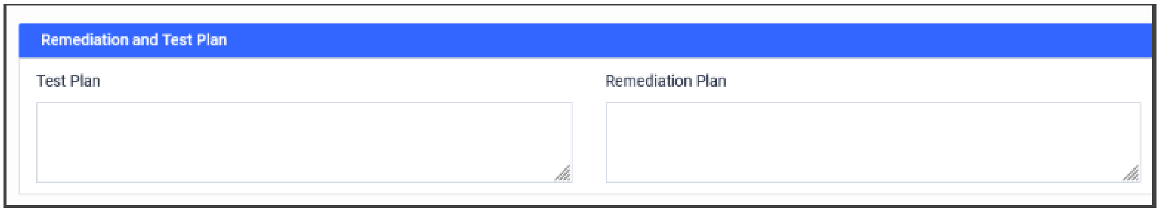
r. Risk and Impact Details- Risk impact is an estimate of the potential losses associated with an identified risk. It is a standard risk analysis practice to develop an estimate of probability and impact.



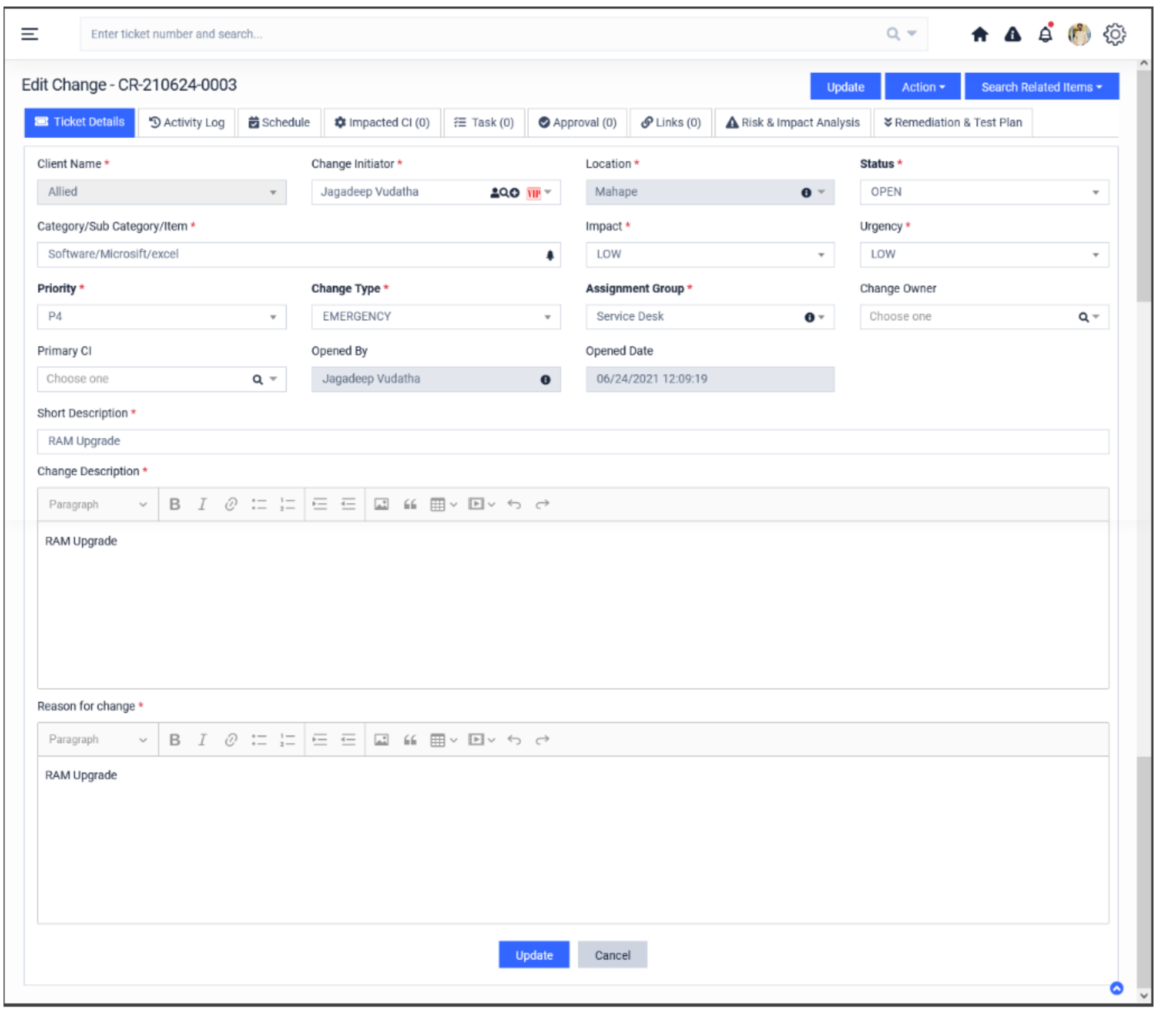
s. Change Schedule- Enter the planned start date and planned end date from the calendar selection icon.



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.**



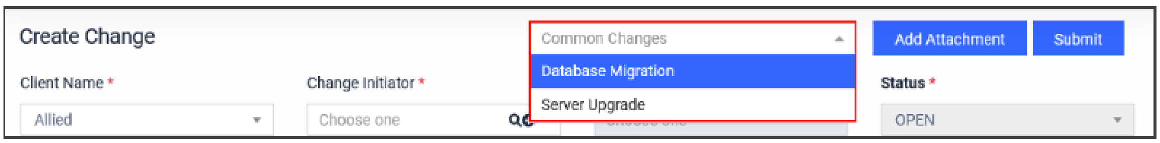
4. Once all the required mandatory are filled and click on **Submit** button.
5. Click on **Add attachment** button to add attachment during the ticket creation
6. New change will be created with **unique change ID** and an email notification is sent to confirm that the ticket has been logged.



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.

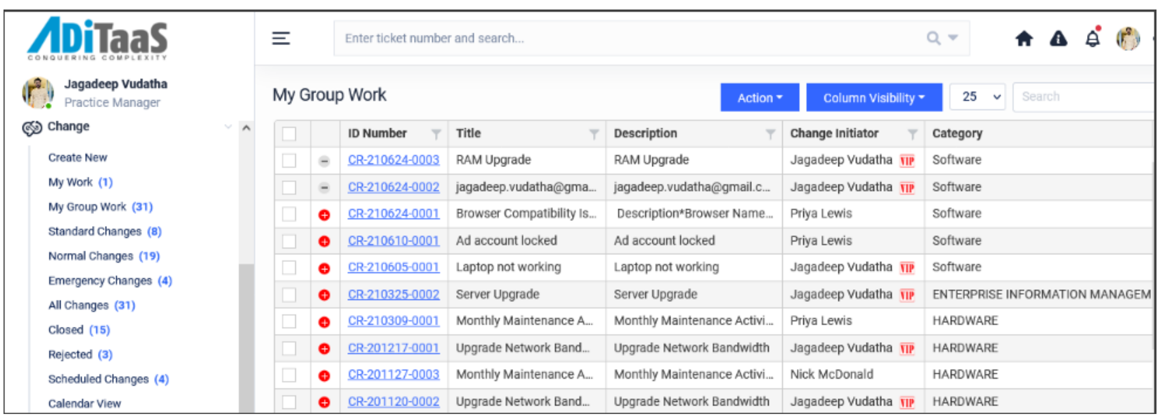
1. Navigate to **Change Module** from left menu bar
2. Click on Create New, displays new change creation page
3. Select the required Create New template from **common changes** drop down
4. The fields can be pre filled with values
5. Enter the Requestor name and any additional information if any
6. Click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



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

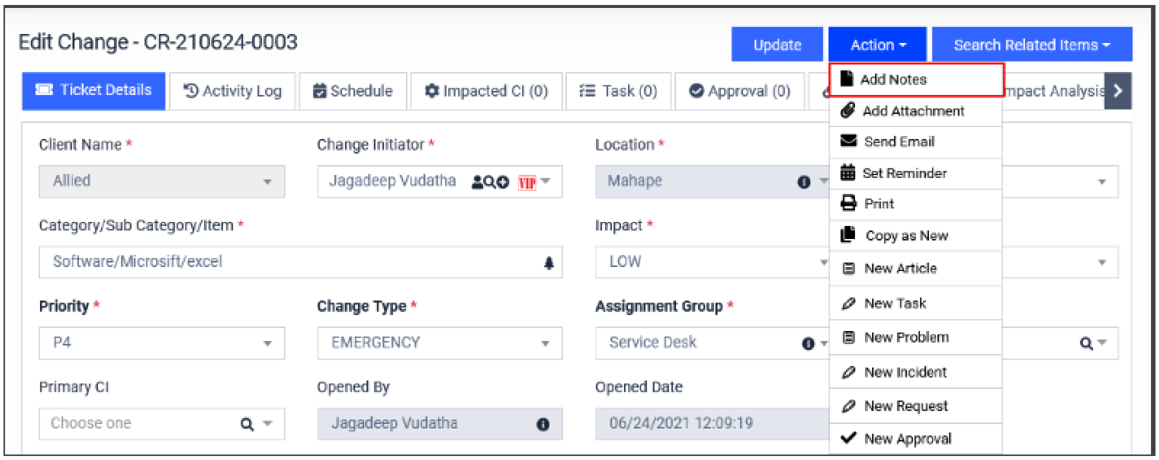
EDIT/ UPDATE CHANGE

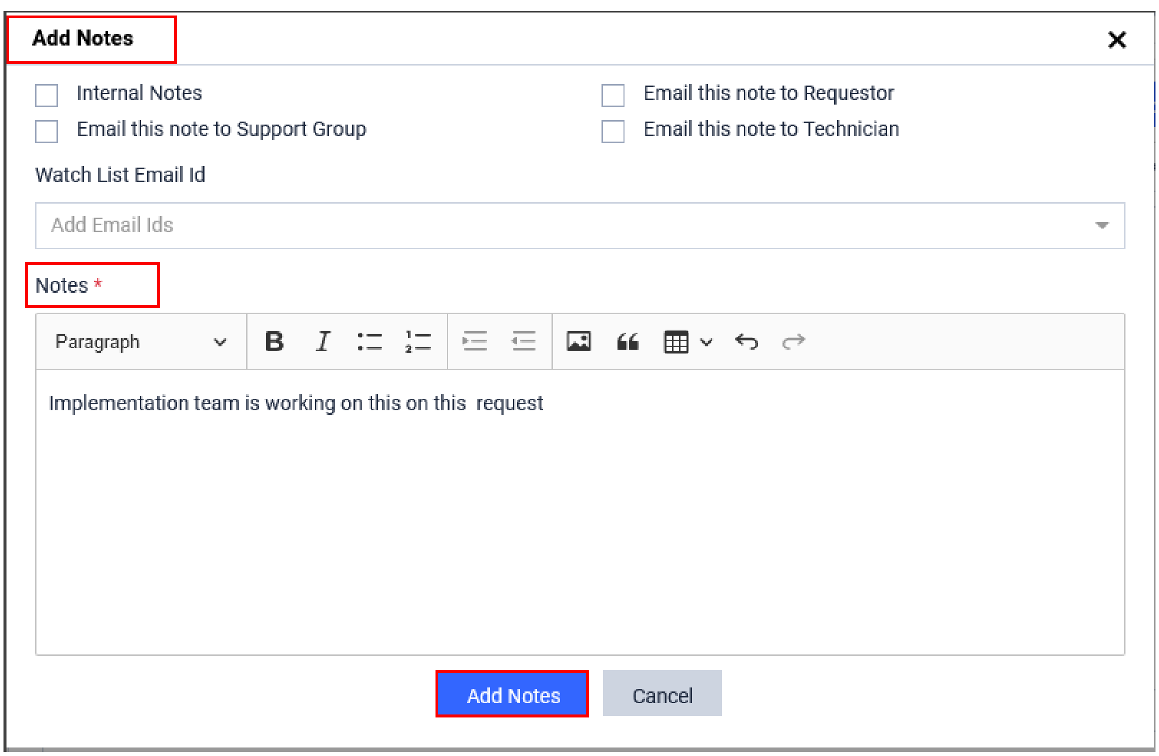
On successful creation of ticket, system will generate unique ticket id. Ticket id starts with date and number. **CR** indicates change ticket.

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

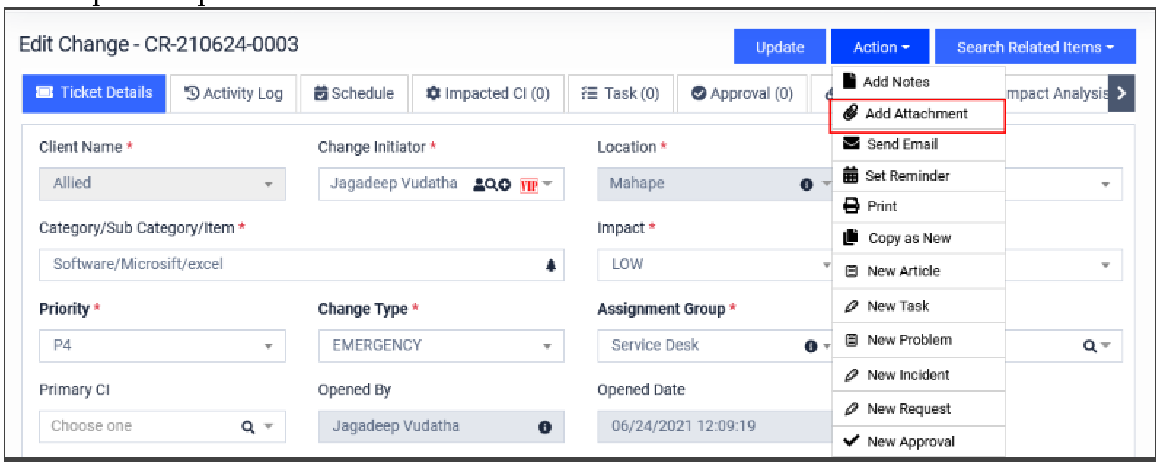


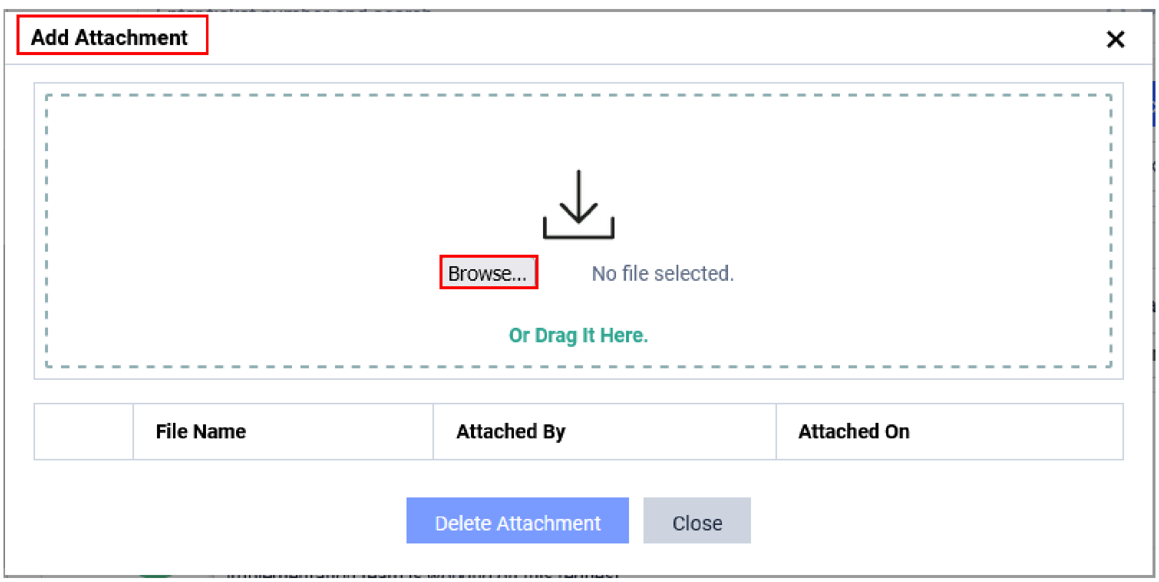


Added information will be visible in **Activity Log**.

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.

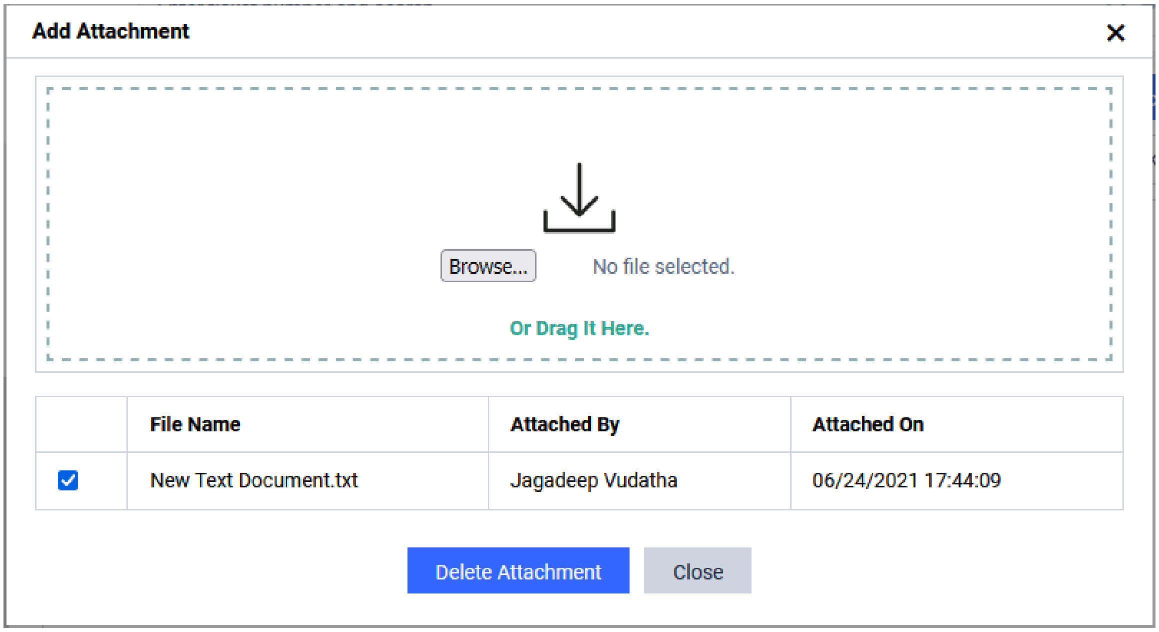




All Uploaded attachments will be visible Under '**View Attachments**' tab.

DELETE/ REMOVE ATTACHMENT:

To remove an attachment, click on respective attached attachment and click on '**Delete Attachment**'.



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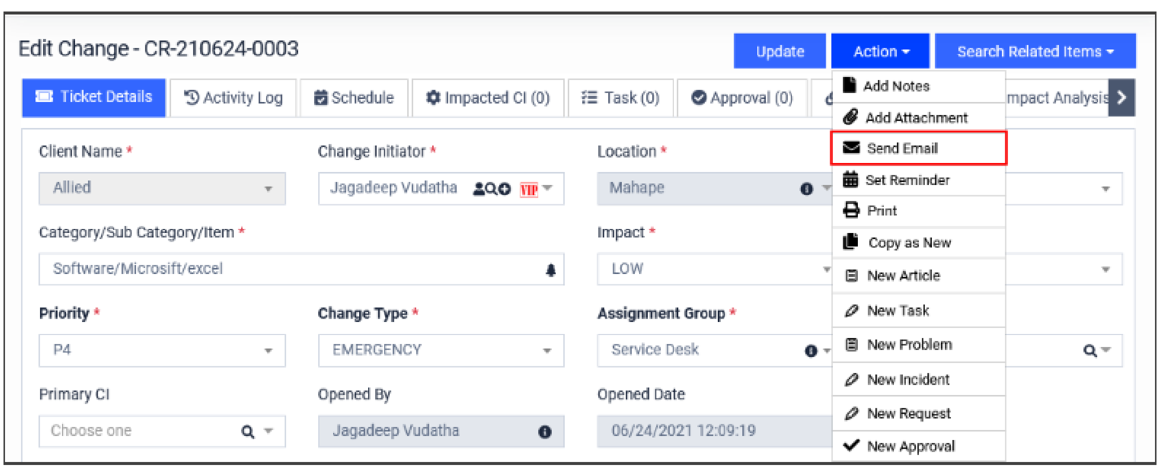
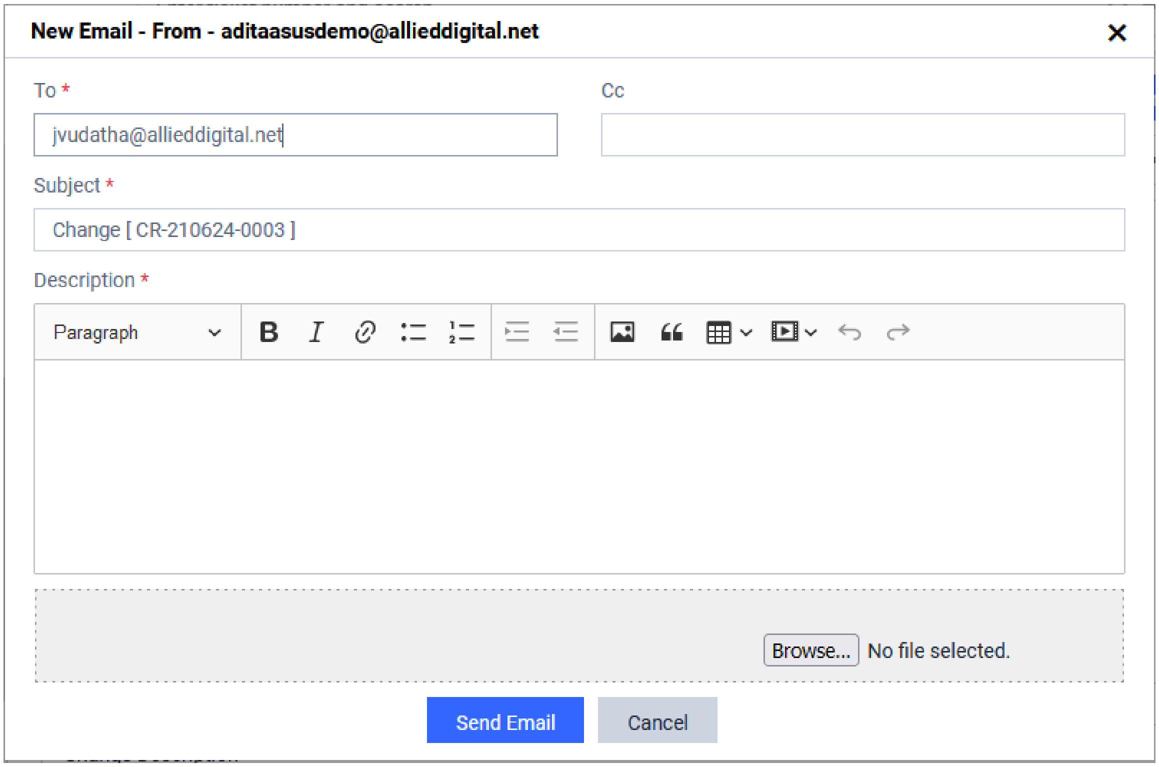


2. Compose email, user email id and ticket id will be auto populated in '**To**' and '**Subject**' fields respectively. Attach any files by clicking the choose files.



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

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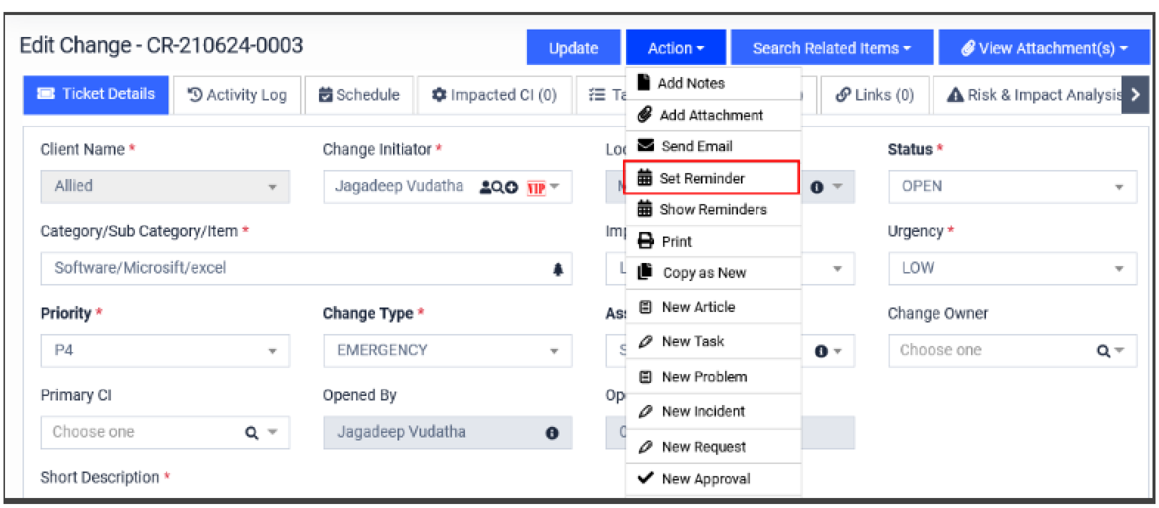

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2. Set reminder dialog box is displayed. Enter the **Subject** and **Comments** in box.
3. Select checkbox, if required to send an email notification regarding the notification.

4. In select applicable option from '**To Whom**' drop down list.
    a. **Remind me** – Reminder will be set for logged in agent.
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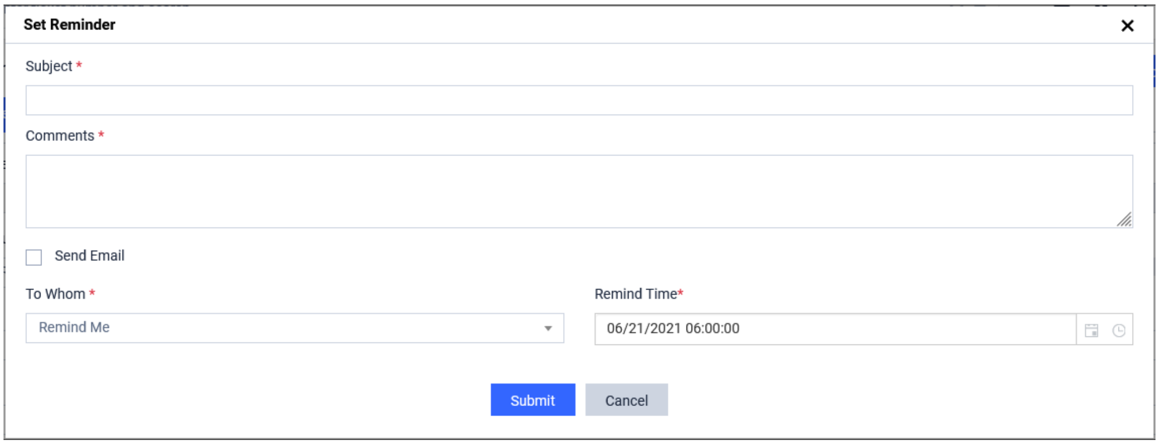
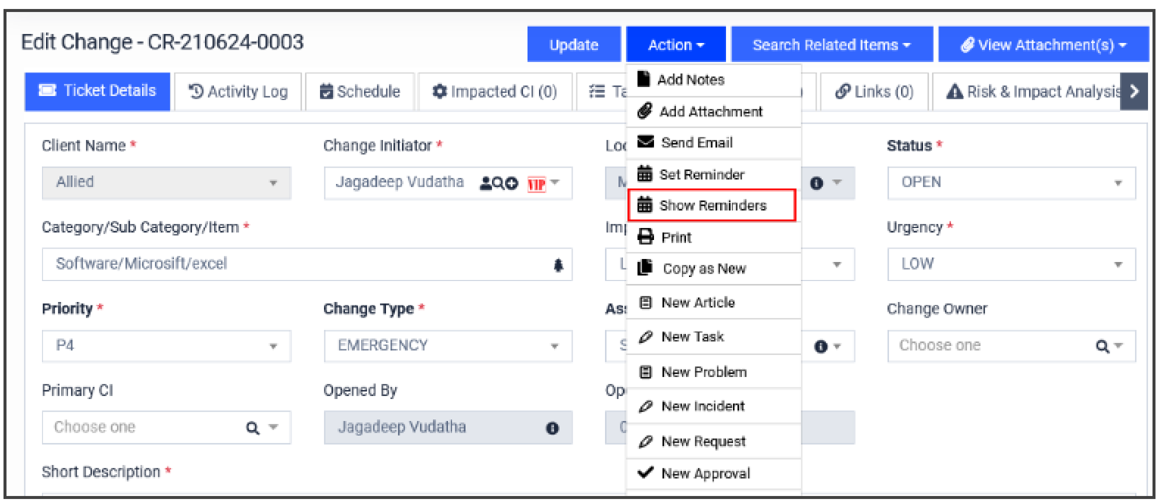
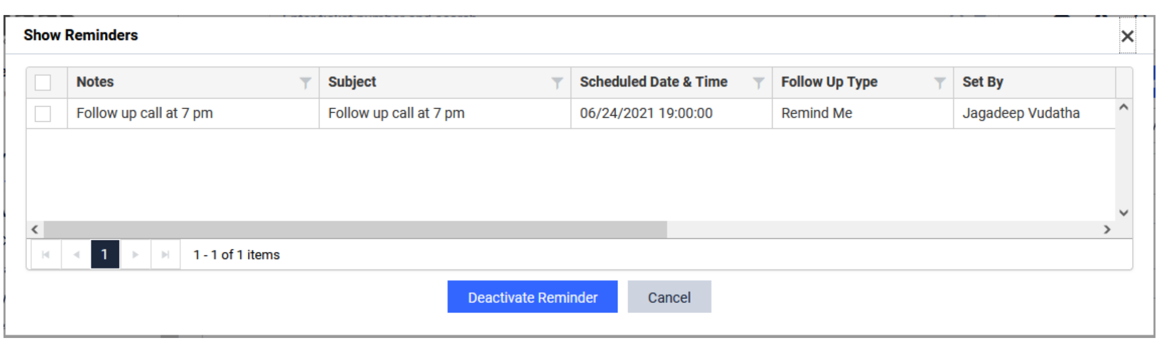


SHOW REMINDERS

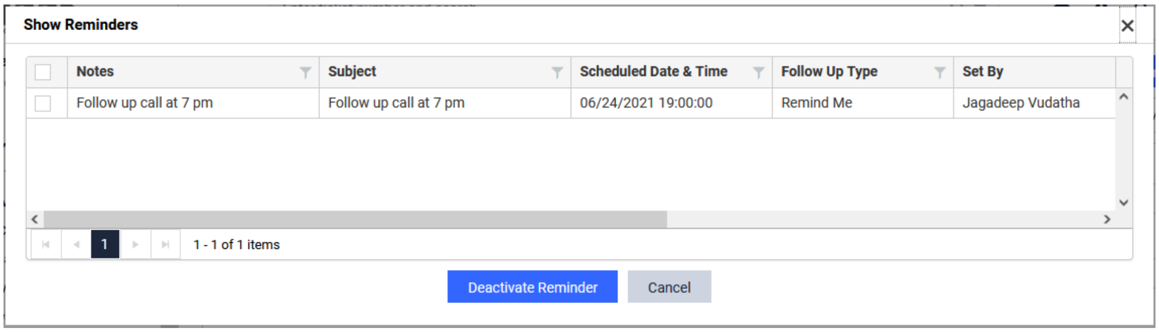
All scheduled reminders will be visible under **Action → Show Reminders** as well as on **Calendar view.**





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.

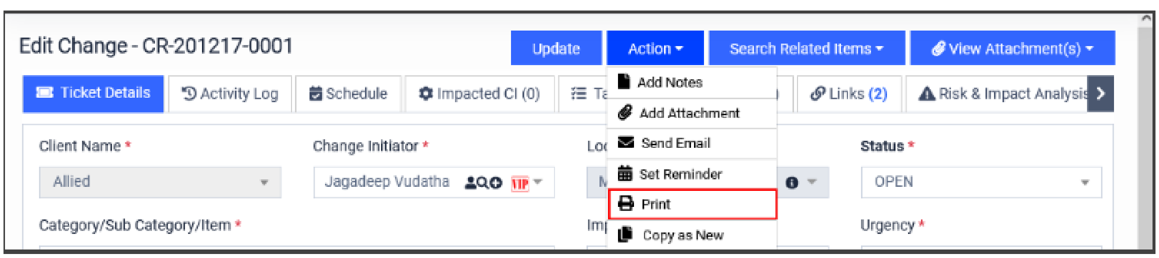
PRINT A CHANGE REQUEST

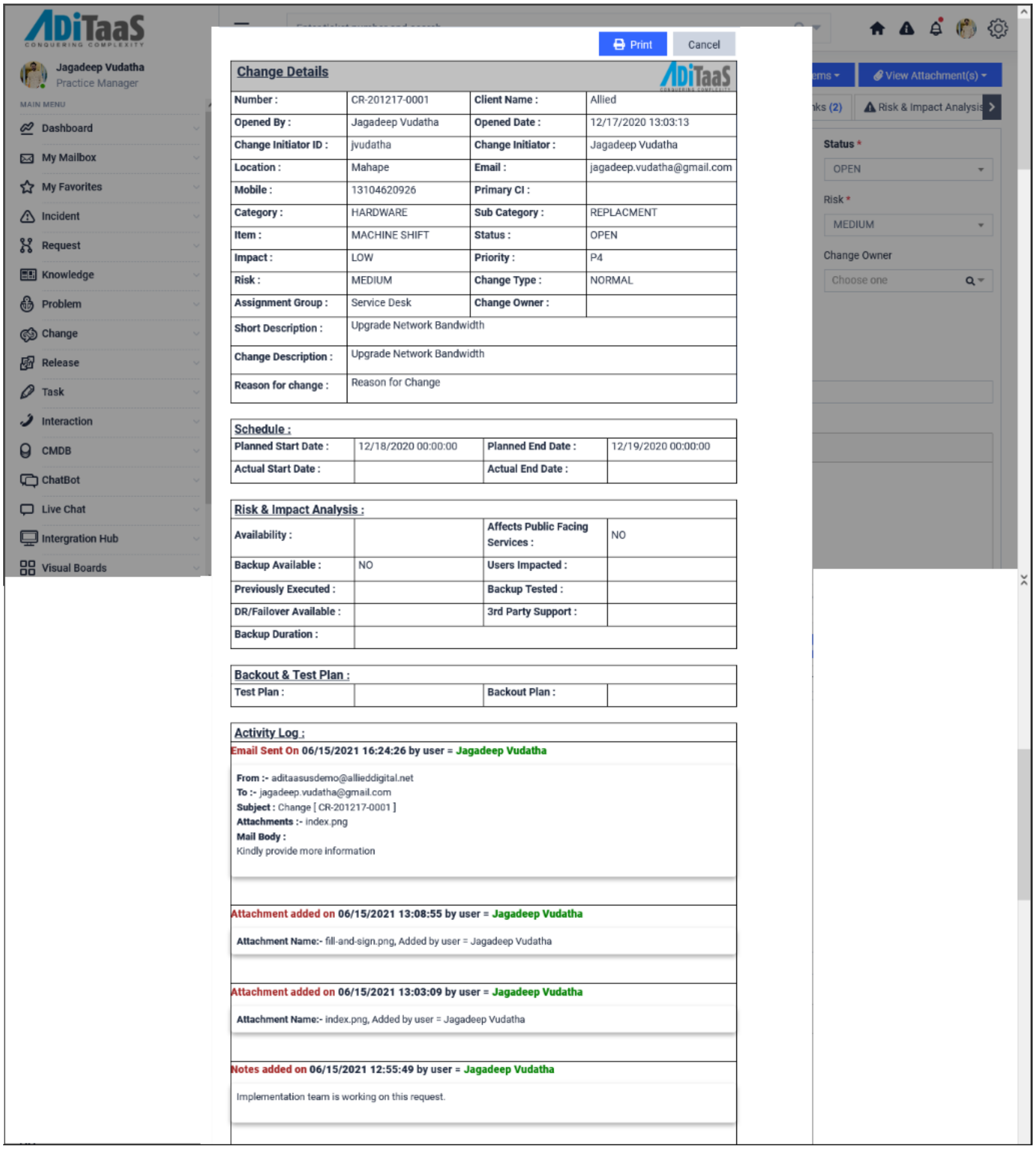
If you want to print a change ticket, open required change ticket need to be print,

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**

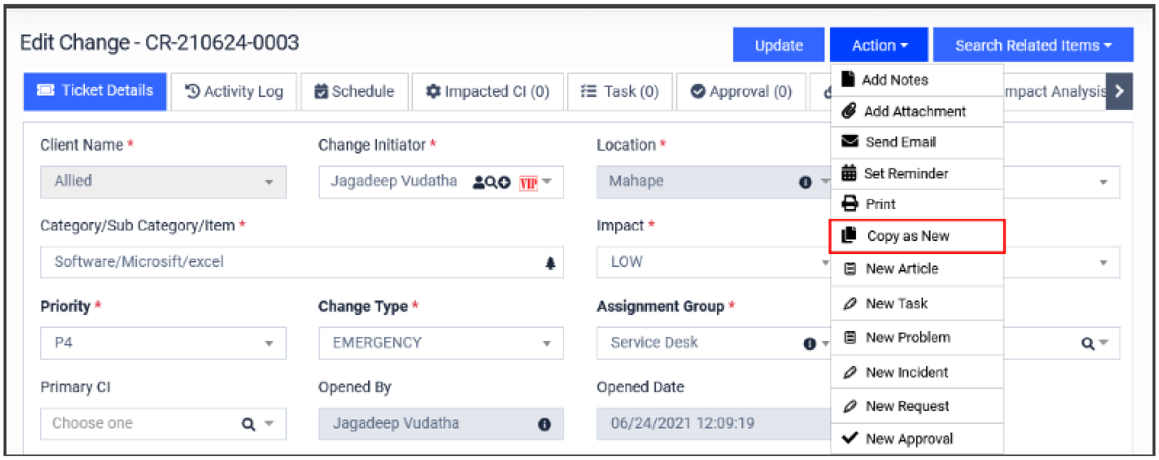


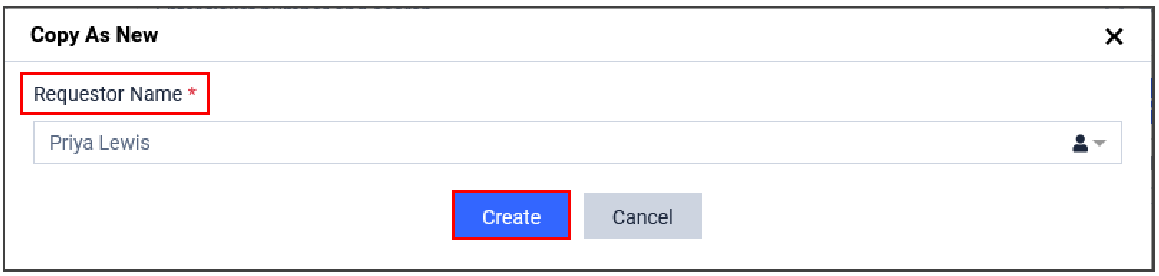


COPY AS NEW

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**





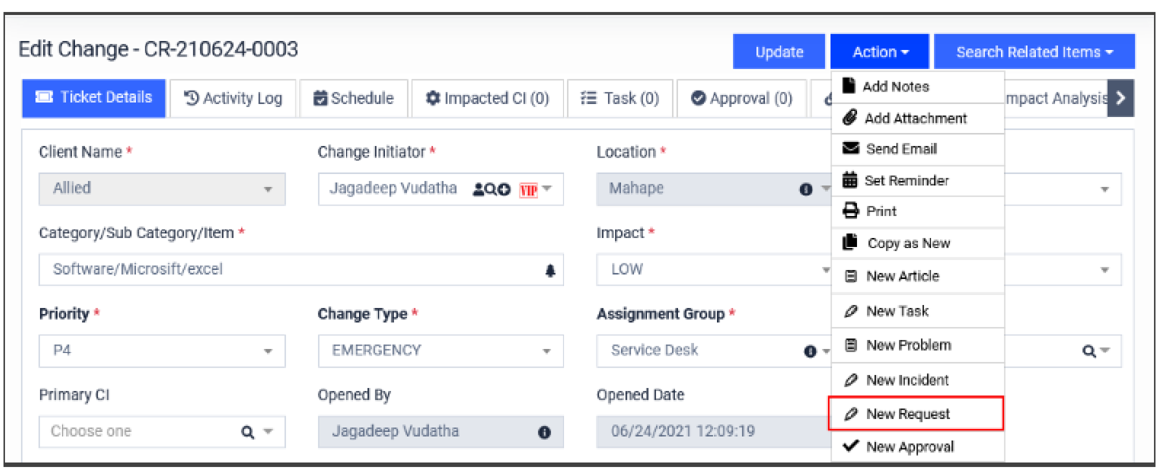
3. Search and select required **Requestor Name** and Click **Submit.**

QUICK LINKS TO CREATE TICKET FROM CHANGE

New Request

Allows to raise a new request ticket from change ticket.

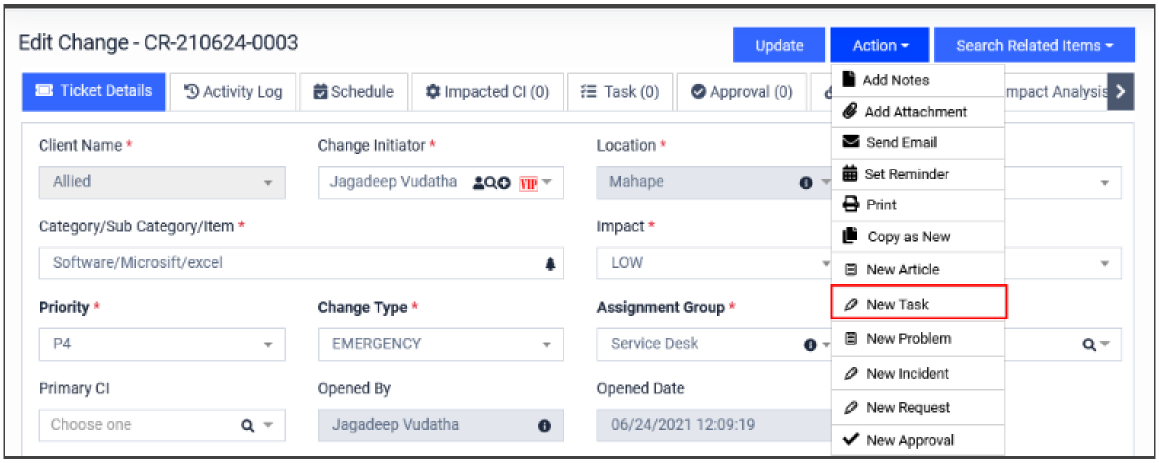
Go to **Action → New Request**



New Task

Allows to raise a new task ticket from change ticket.

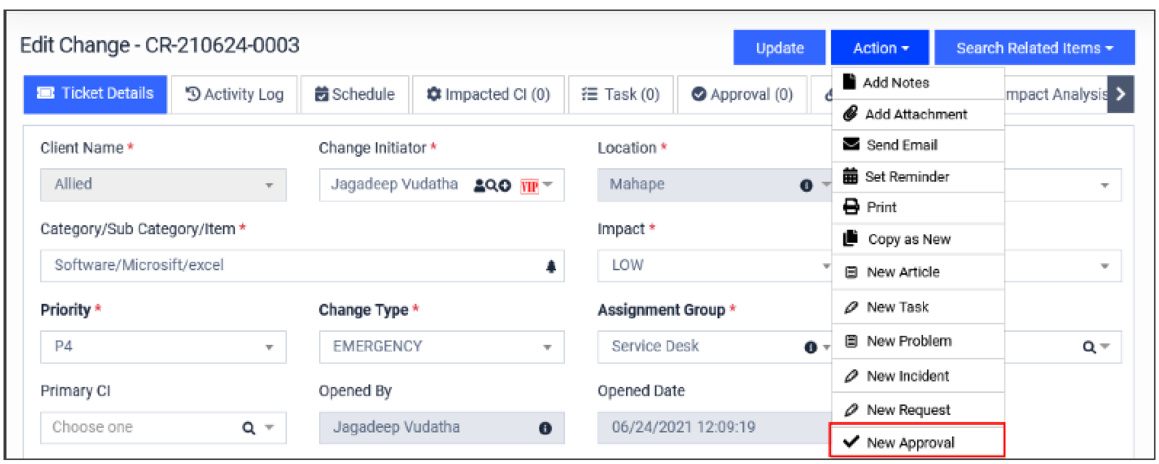
Go to **Action → New Task**



New Approval

Allows to raise an approval ticket from change ticket.

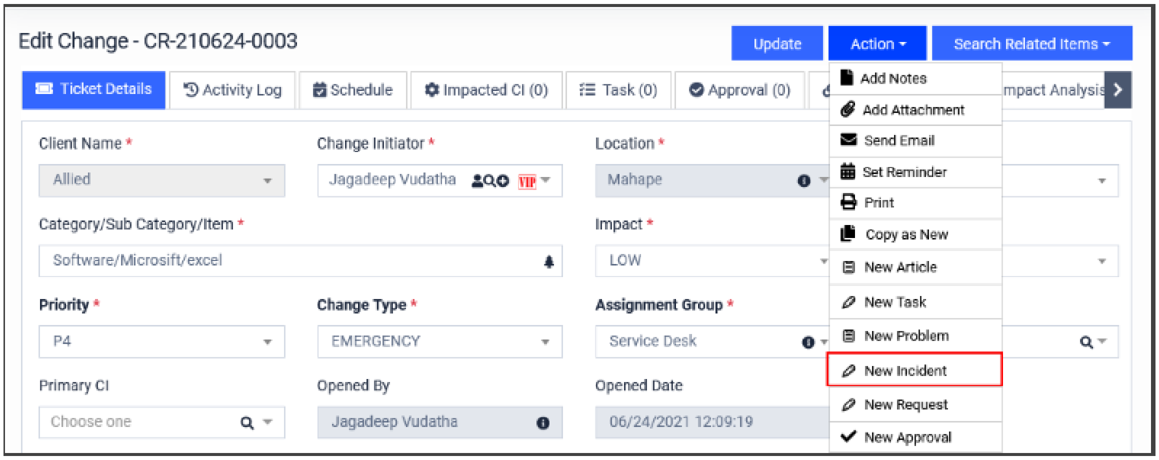
Go to **Action → New Approval**



New Incident

Allows to raise a new incident ticket from change ticket.

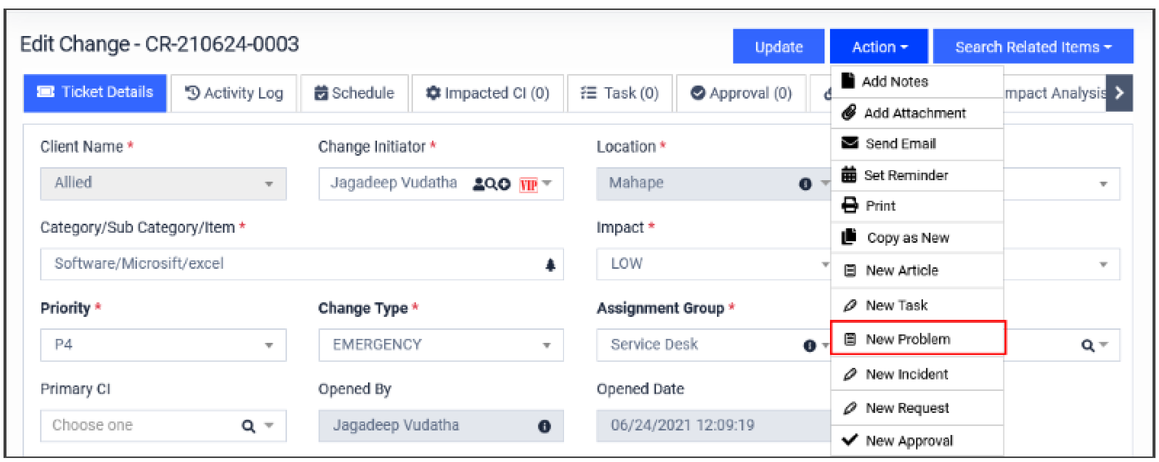
Go to **Action → New Incident**



New Problem

Allows to raise a new problem ticket from change ticket.

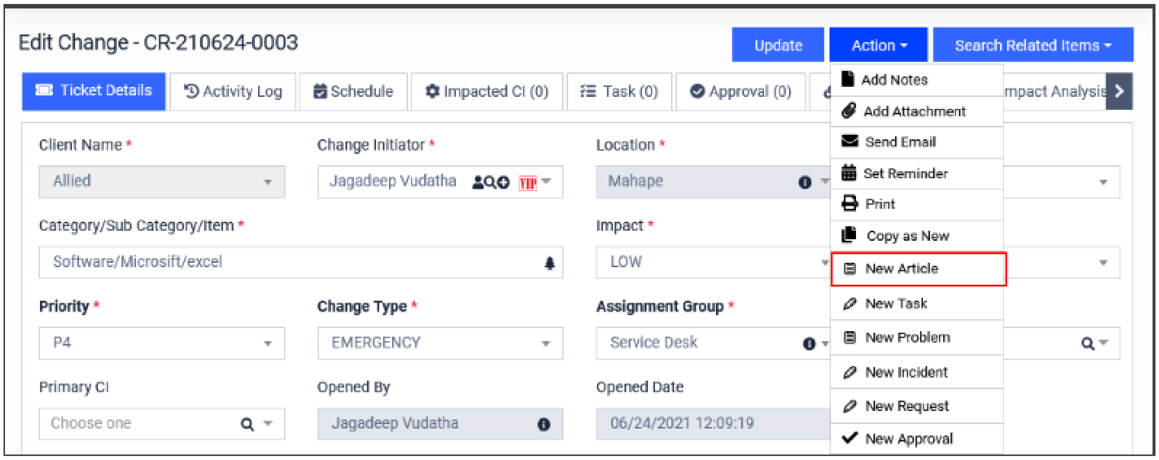
Go to **Action → New Problem**



New Article

Allows to raise an article from change ticket.

Go to **Action → New Article**



CHANGE ACTIVITY LOG

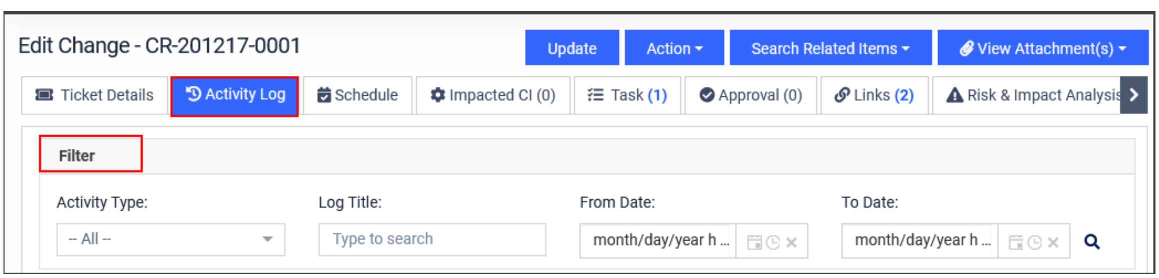
Activity log captures all actions performed on ticket from change creation to closure with date/time stamp along with agent id. All modification performed on ticket is auto captured. From the creation of ticket to resolution all activities are captured with order. All activities like add notes, add attachment, 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 test field, depend on keyword displays the activity log

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

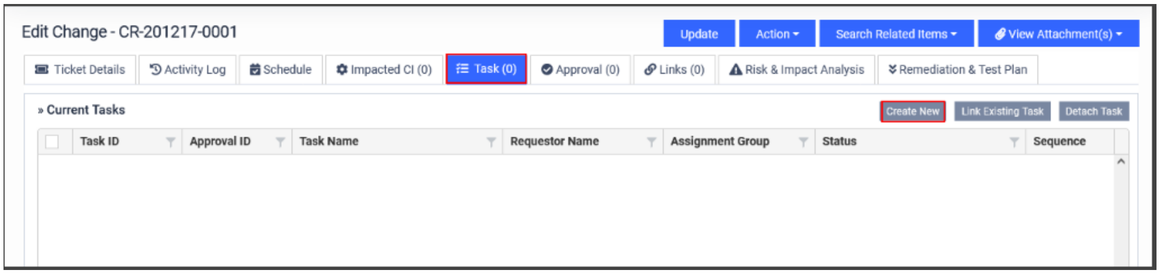


Note: Logs in the tool protected from alteration after-the-fact.

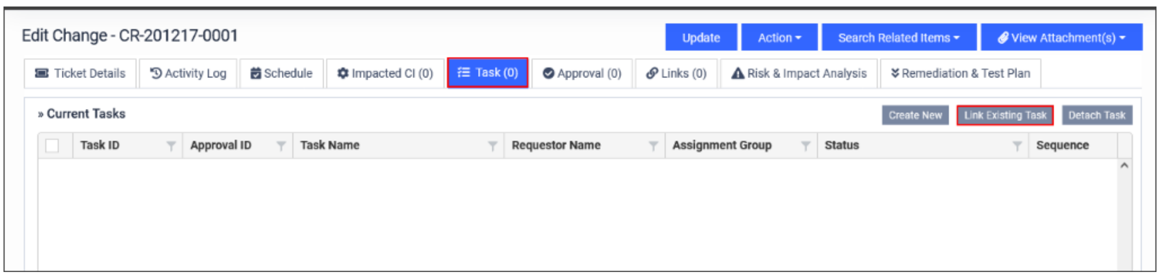
TASK

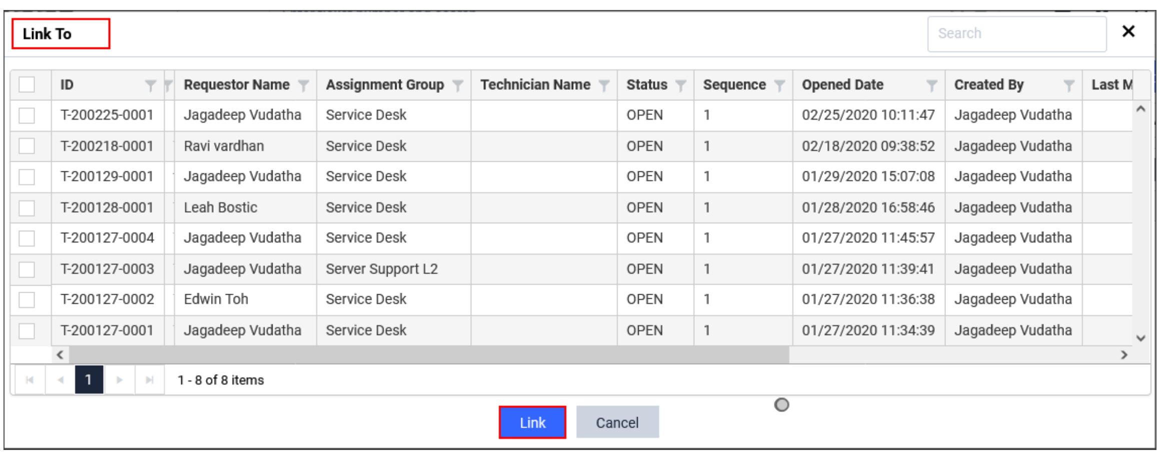
Agent can create a new Task and link to change request or open any existing tasks and can link to change. Change ticket cannot be resolved until all linked tasked are closed.

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

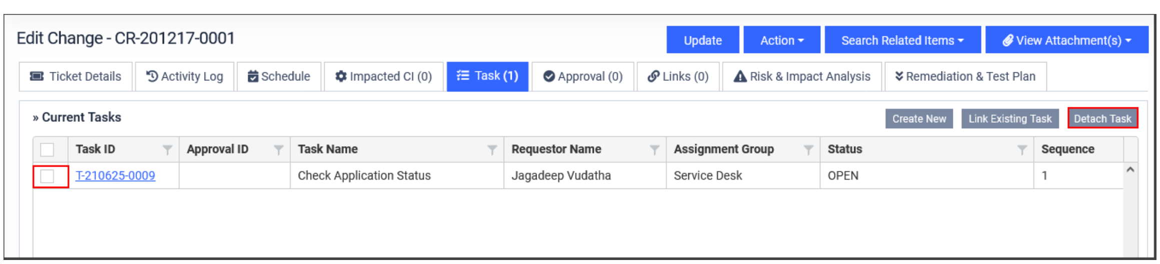


Link Existing Task- To link existing link Tasks, click on **Task → Link Existing Task**
Displays list of existing Tasks. Agent can link one or more tasks to change request by clicking on checkboxes.





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



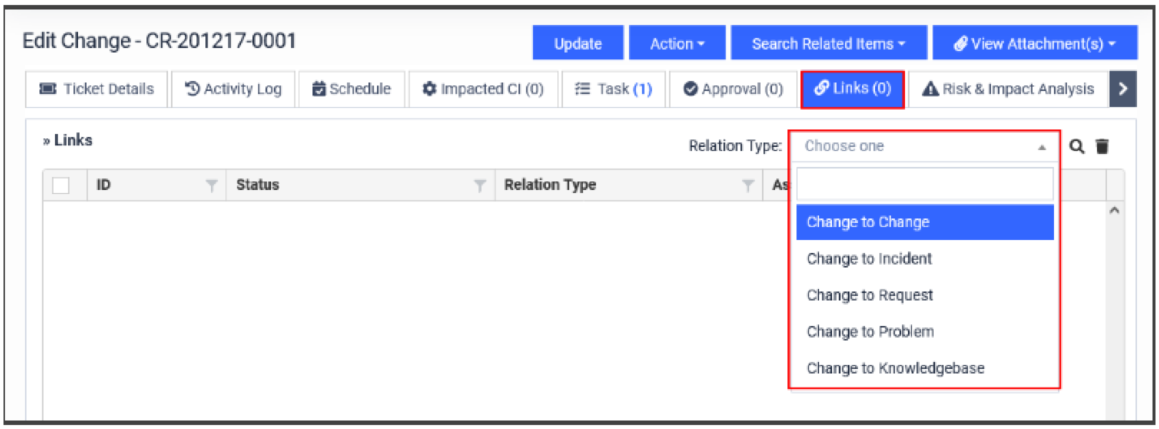
LINKS

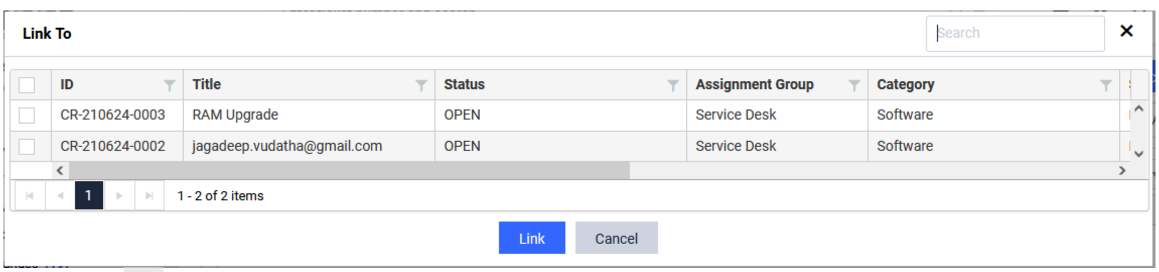
This tab allows agents to create relationships by linking Change to other tickets in system.

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**'

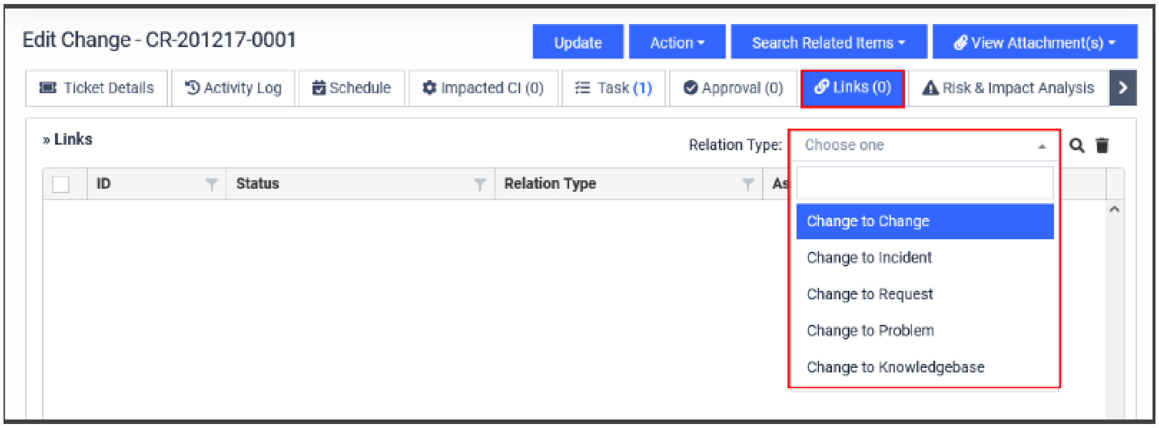


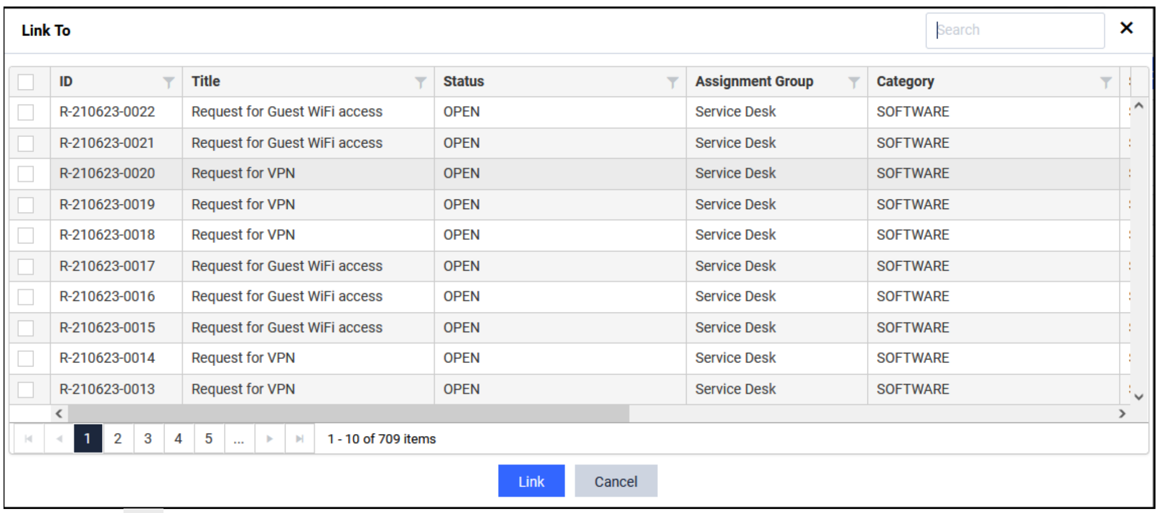


4. Click on  icon, which will display all open changes in a pop-up box. Agent can select changes and attach to change.
5. Click on Link
6. Linked ticket will be visible on Links tab.

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**'

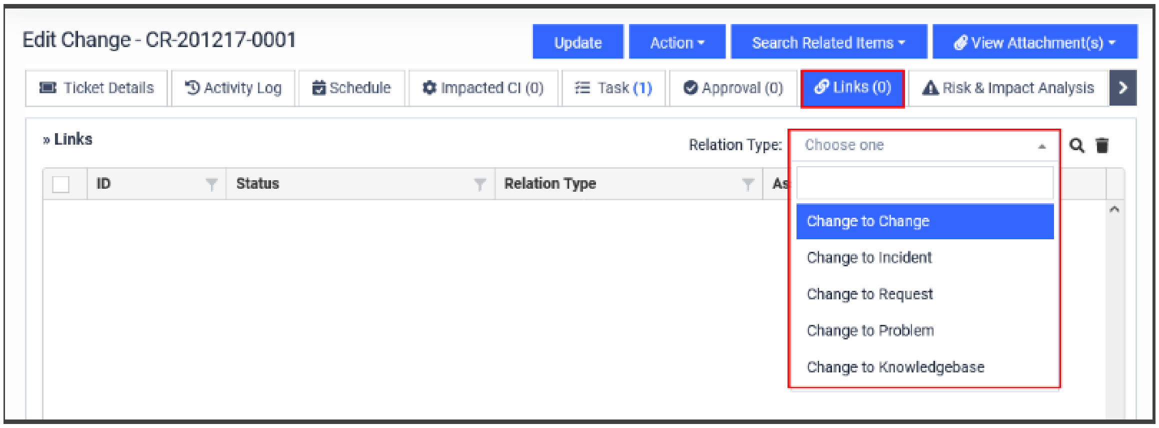


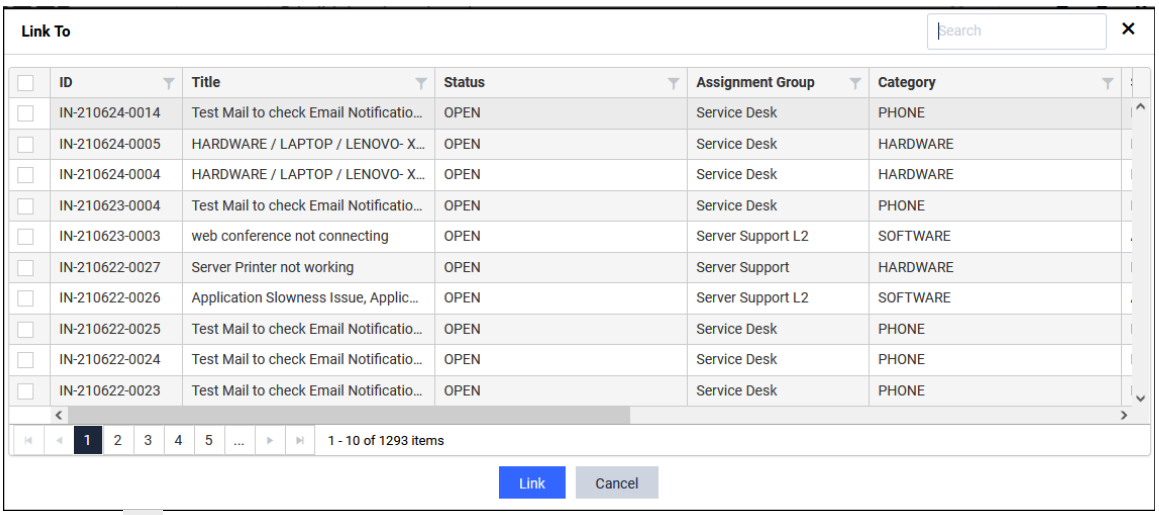


4. Click on icon, which will display all open requests in a pop-up box. Agent can select requests and attach to change.
5. Click on Link
6. Linked ticket will be visible on Links tab.

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

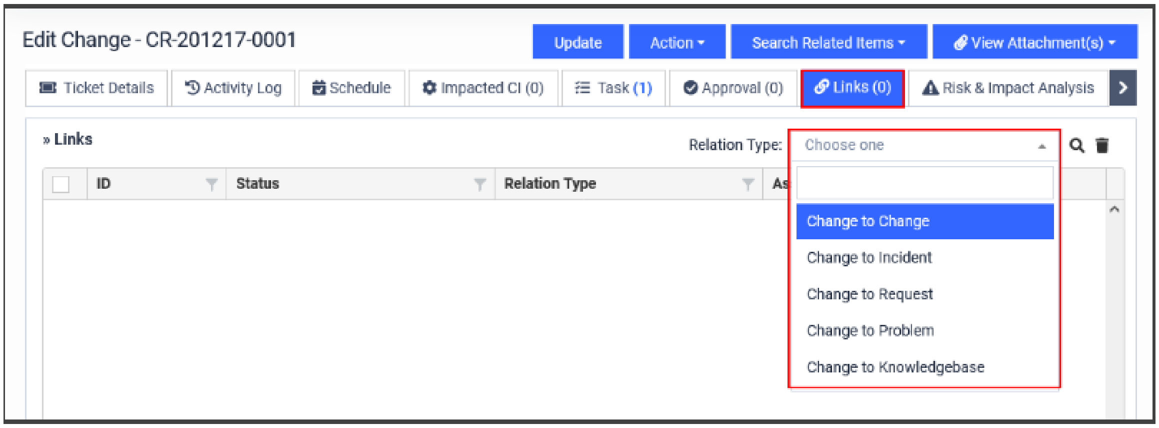


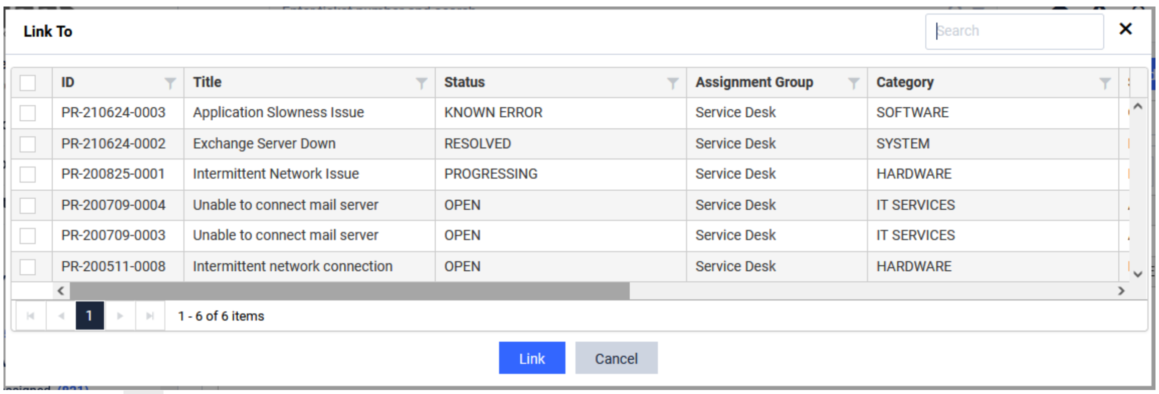


4. Click on icon, which will display all open incidents in a pop-up box. Agent can select incidents and attach to change.
5. Click on Link
6. Linked ticket will be visible on Links tab.

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**'



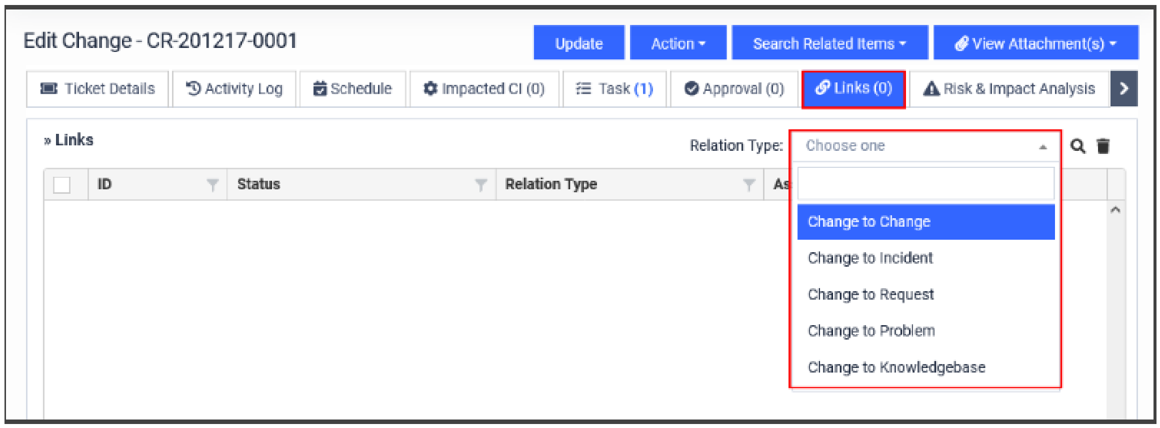


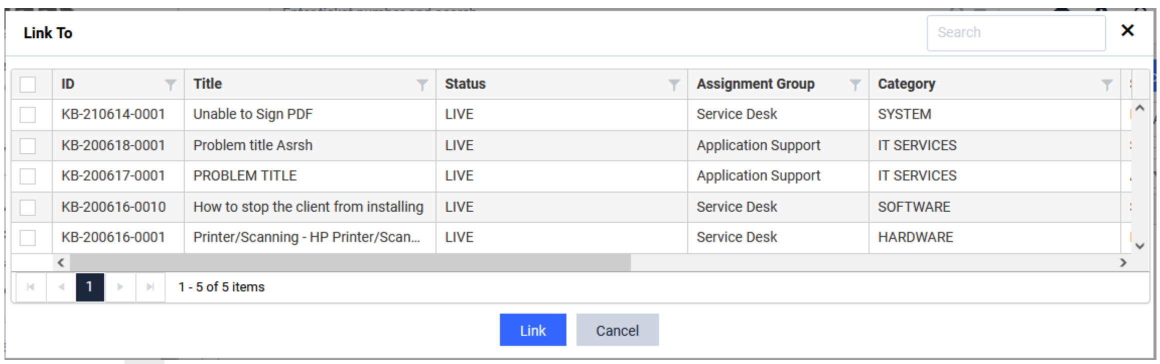
	ID	Title	Status	Assignment Group	Category
	PR-210624-0003	Application Slowness Issue	KNOWN ERROR	Service Desk	SOFTWARE
	PR-210624-0002	Exchange Server Down	RESOLVED	Service Desk	SYSTEM
	PR-200825-0001	Intermittent Network Issue	PROGRESSING	Service Desk	HARDWARE
	PR-200709-0004	Unable to connect mail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

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**'





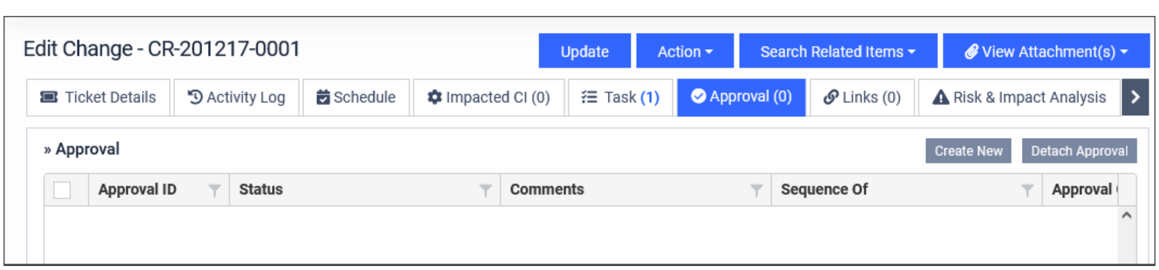
4. Click on icon, which will display all articles in a pop-up box. Agent can select article and attach to change.
5. Click on Link
6. Linked article will be visible on Links tab.

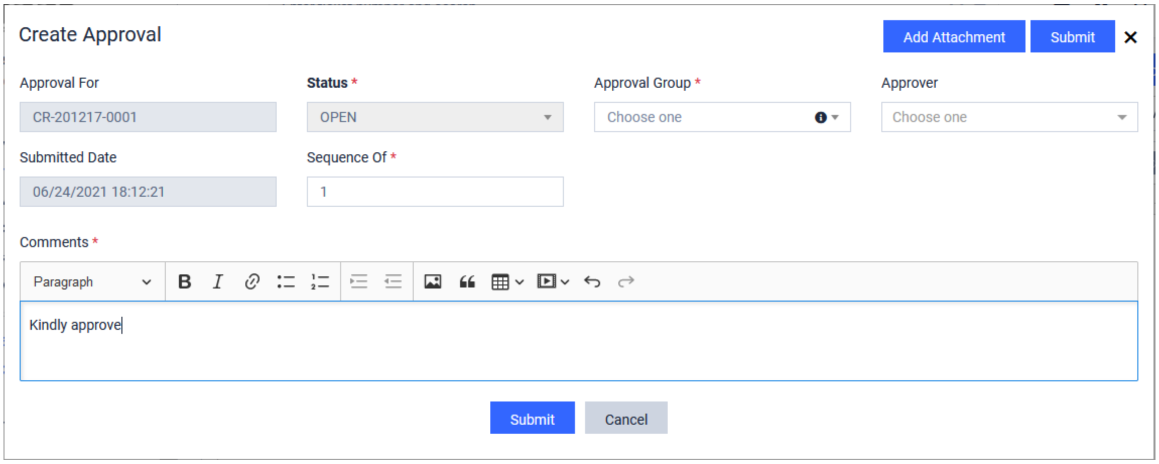
Detach Ticket: The agent can detach a linked incident or any other ticket by selecting a ticket and clicking on the Delete button.

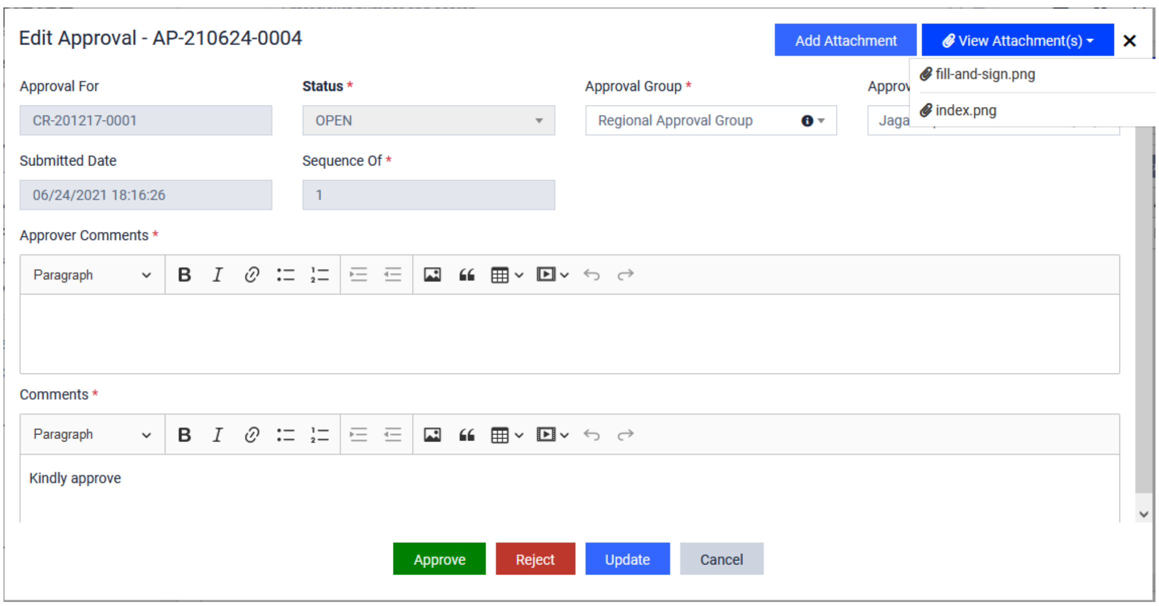
APPROVALS

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.



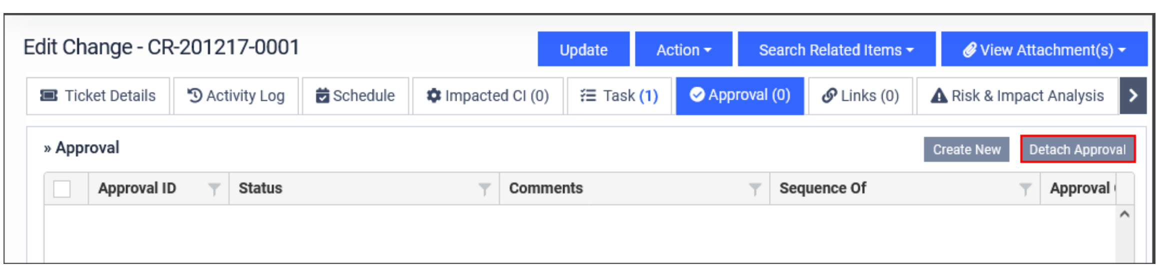




On submitting a request for approval, approver will receive an approval mail with a link to approve or reject the request.

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**.

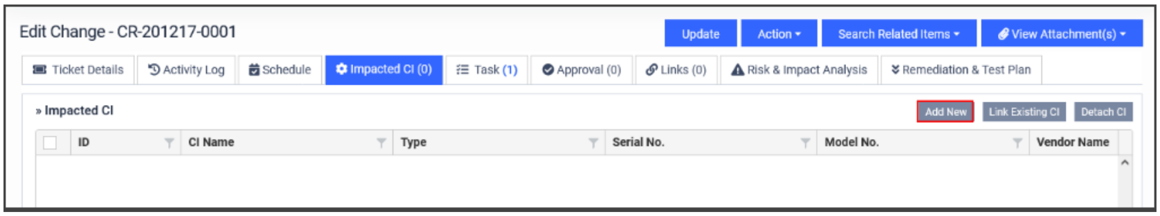
To detach any approval, click on '**Detach Approval**'.

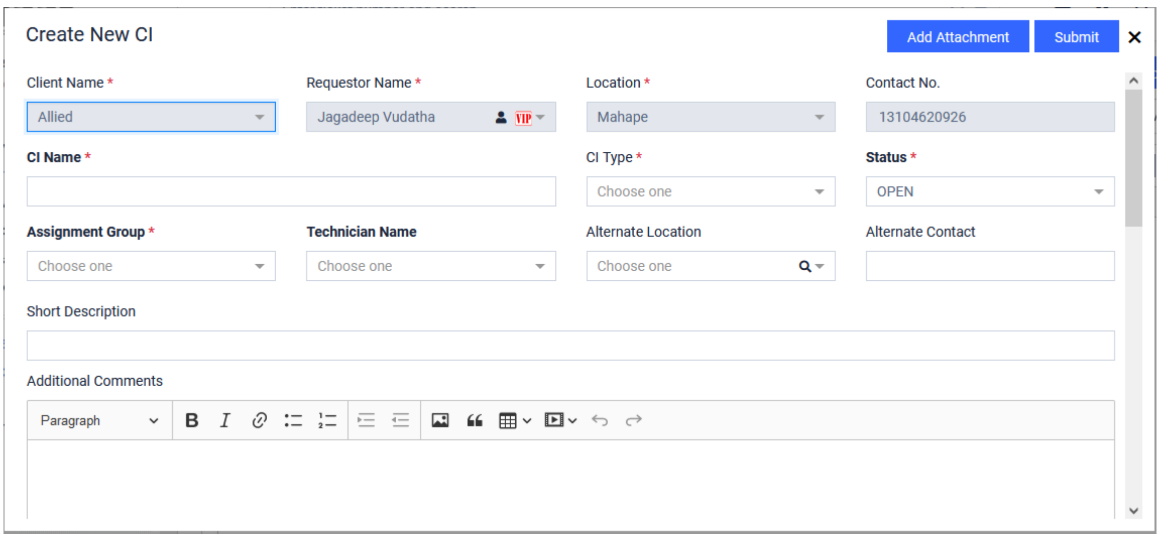


IMPACTED CI

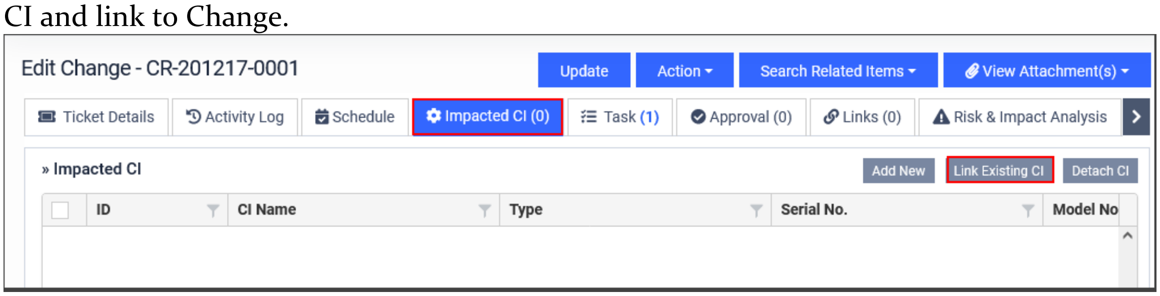
Related configuration items can be added under ‘Impacted CI’ tab.

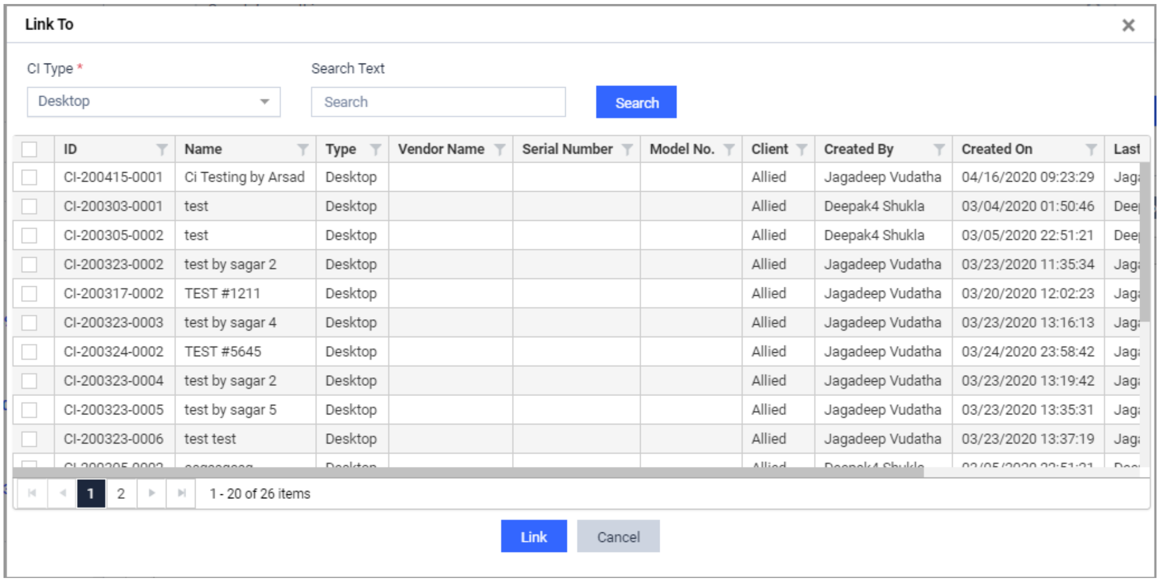
Add New- Allows to create a new CI and link to Change.



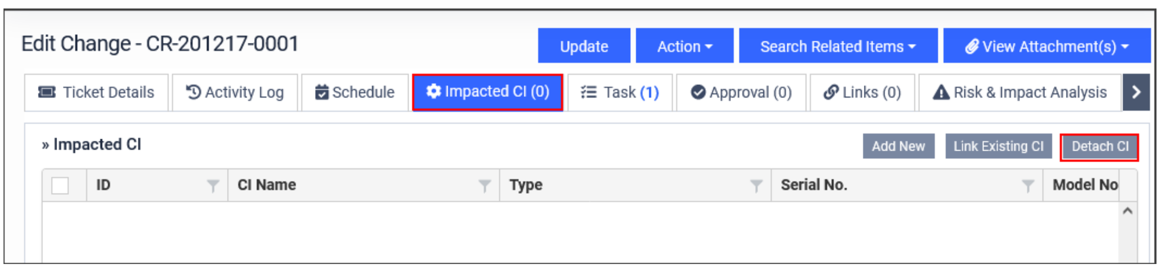


Link Existing CI- On clicking link existing CI, displays all available CI and agent can select related CI and link to Change.



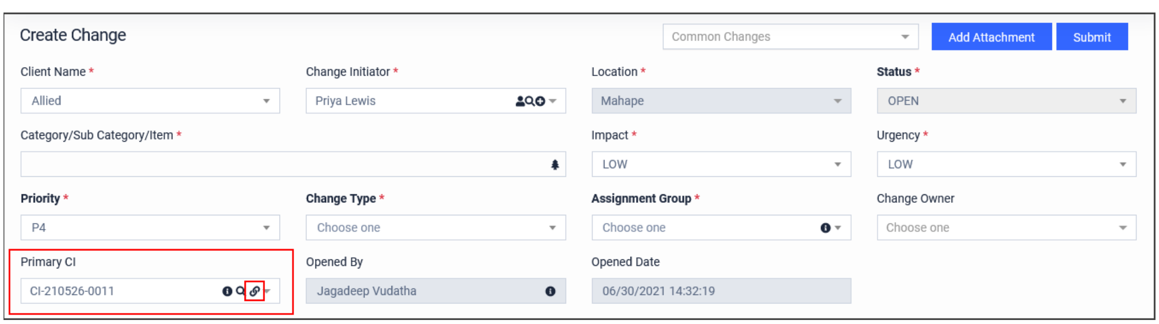


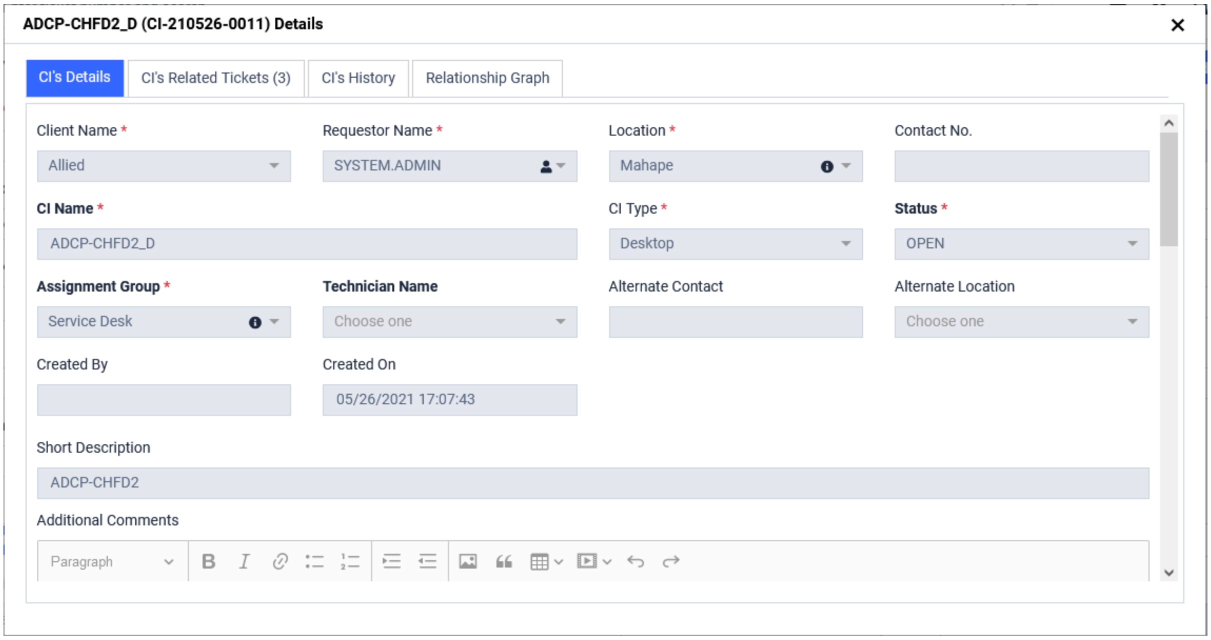
Detach CI- Linked CI can de detached by clicking on '**Detach CI**'.

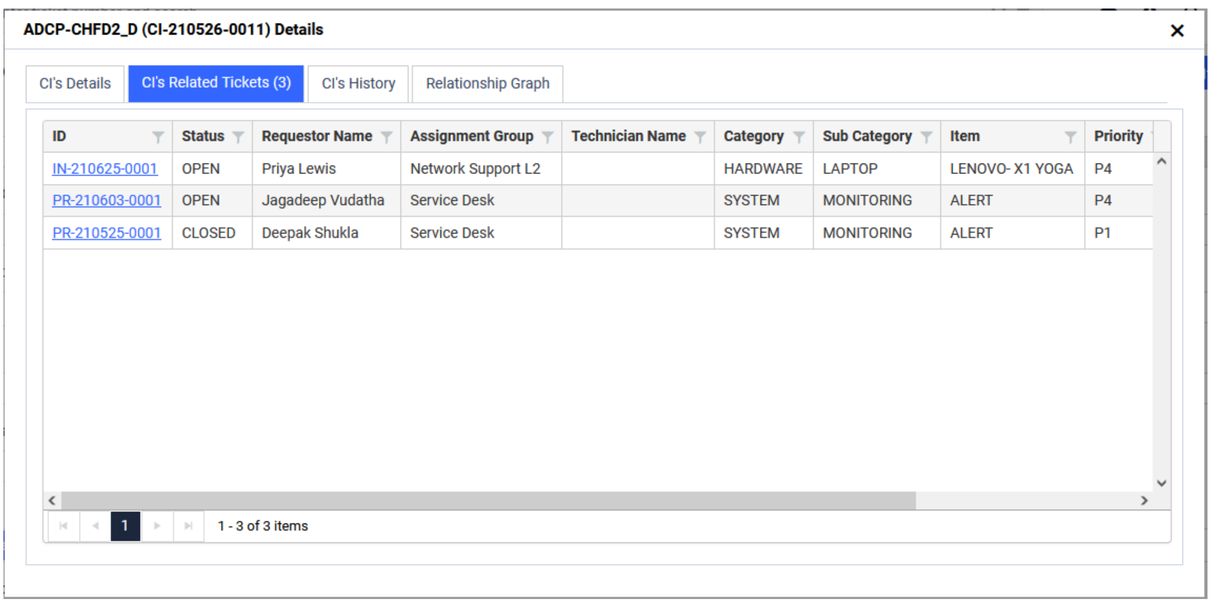


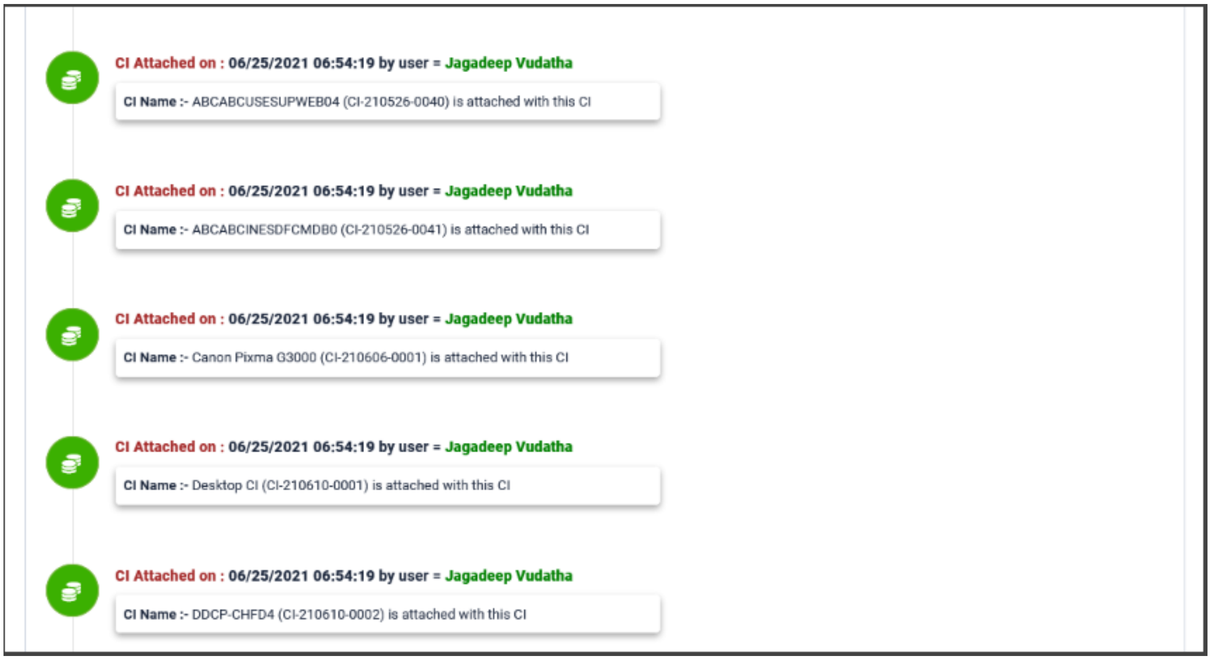
VIEW CI DETAILS FROM CHANGE PAGE

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.

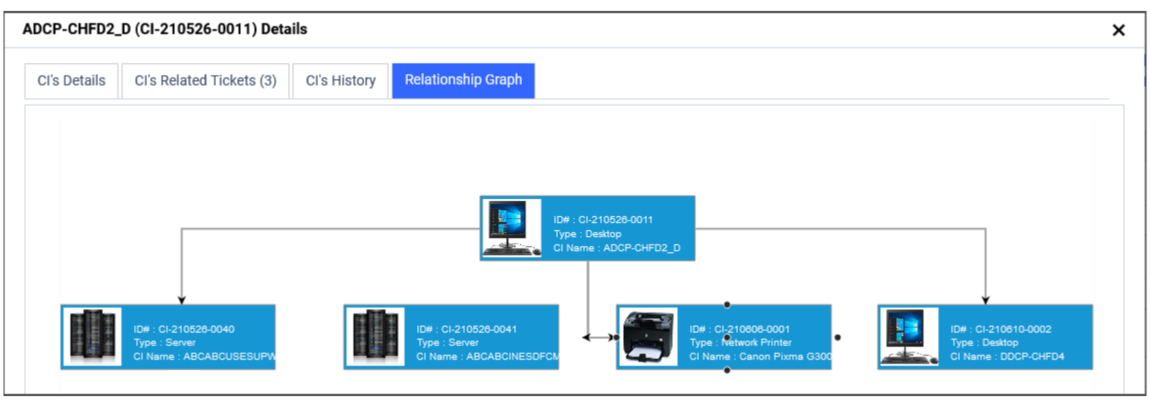


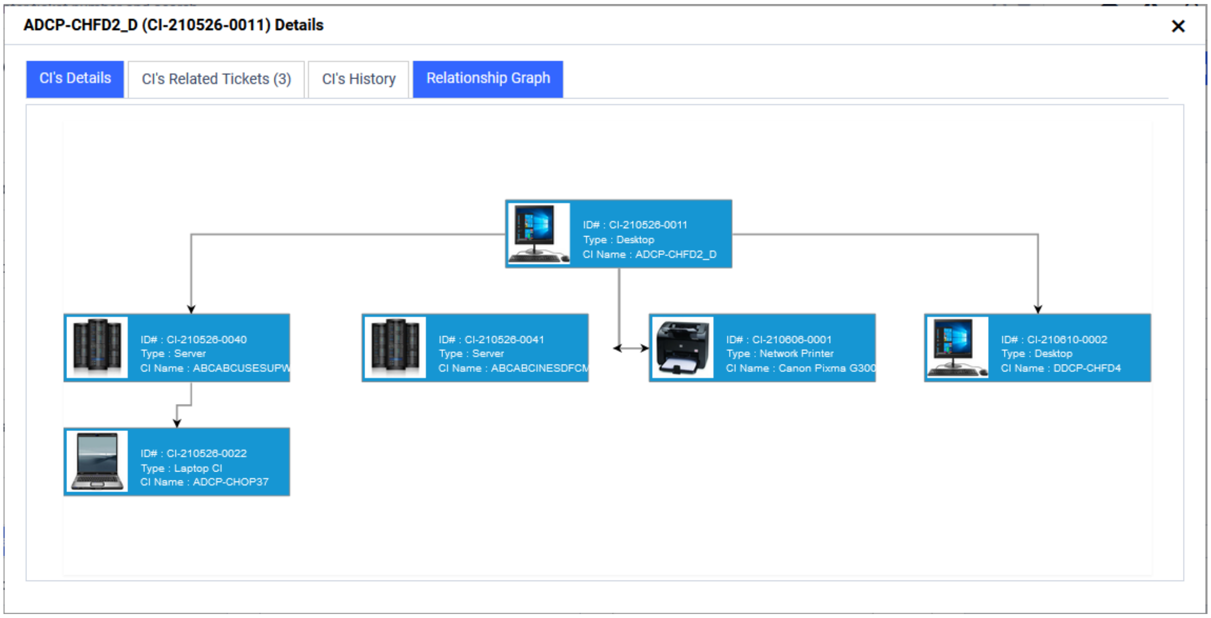

ADCP-CHFD2_D (CI-210526-0011) Details
CI's Details
CI's Related Tickets (3)
CI's History
Relationship Graph
Client Name *
Allied
Requestor Name *
SYSTEM.ADMIN
Location *
Mahape
Contact No.
CI Name *
ADCP-CHFD2_D
CI Type *
Desktop
Status *
OPEN
Assignment Group *
Service Desk
Technician Name
Choose one
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
IN-210625-0001 | OPEN | Priya Lewis | Network Support L2 | | HARDWARE | LAPTOP | LENOVO- X1 YOGA | P4
PR-210603-0001 | OPEN | Jagadeep Vudatha | Service Desk | | SYSTEM | MONITORING | ALERT | P4
PR-210525-0001 | 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 :- 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

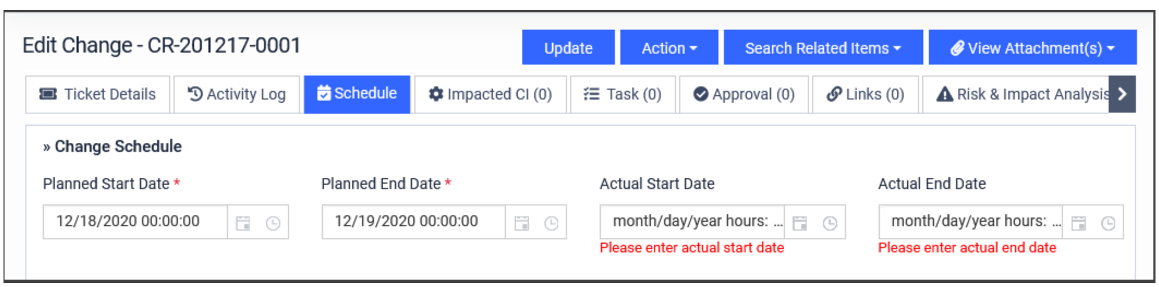

ADCP-CHFD2_D (CI-210526-0011) Details
CI's Details
CI's Related Tickets (3)
CI's History
Relationship Graph
ID# : CI-210526-0011
Type : Desktop
CI Name : ADCP-CHFD2_D


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
ID# : CI-210526-0040
Type : Server
CI Name : ABCABCUSESUPW
ID# : CI-210526-0041
Type : Server
CI Name : ABCABCINESDFCM
ID# : CI-210606-0001
Type : Network Printer
CI Name : Canon Pixma G300
ID# : CI-210610-0002
Type : Desktop
CI Name : DDCP-CHFD4



CHANGE TICKET CLOSURE

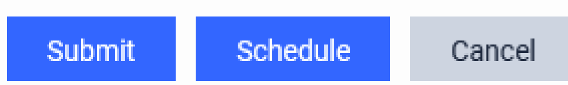
Upon selecting **closed** status from status drop down, enter the closure comments and actual activity start and end date/time in schedule tab.



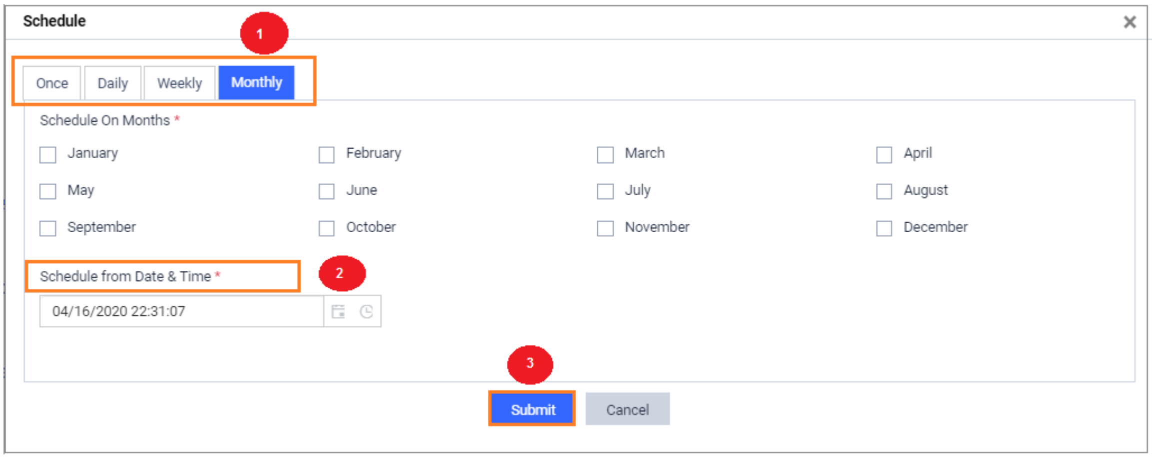
SCHEDULED CHANAGES

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



Task Module

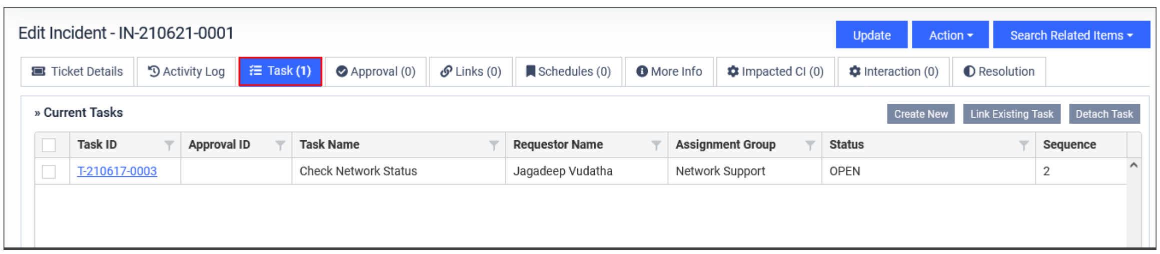
Task is used when a particular ticket require other assignment groups in tool to get involve in order to resolve the one particular **ticket.**

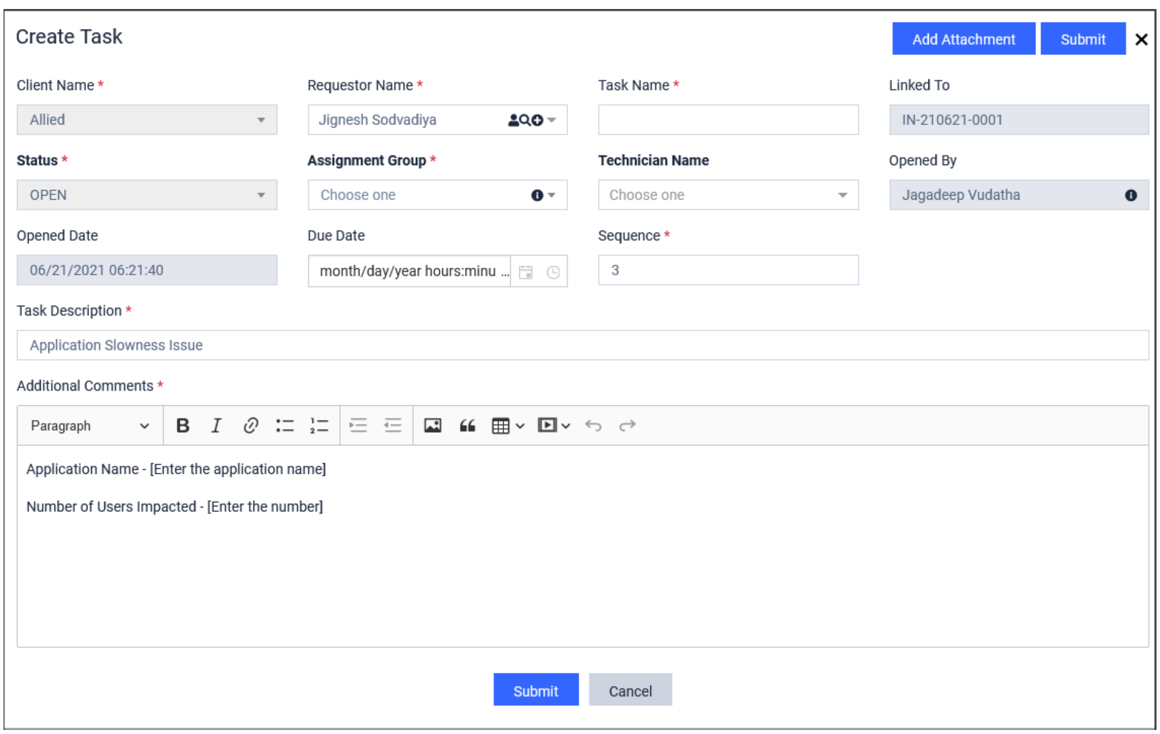
Task ticket can be created via task module or via particular ticket.

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.





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.

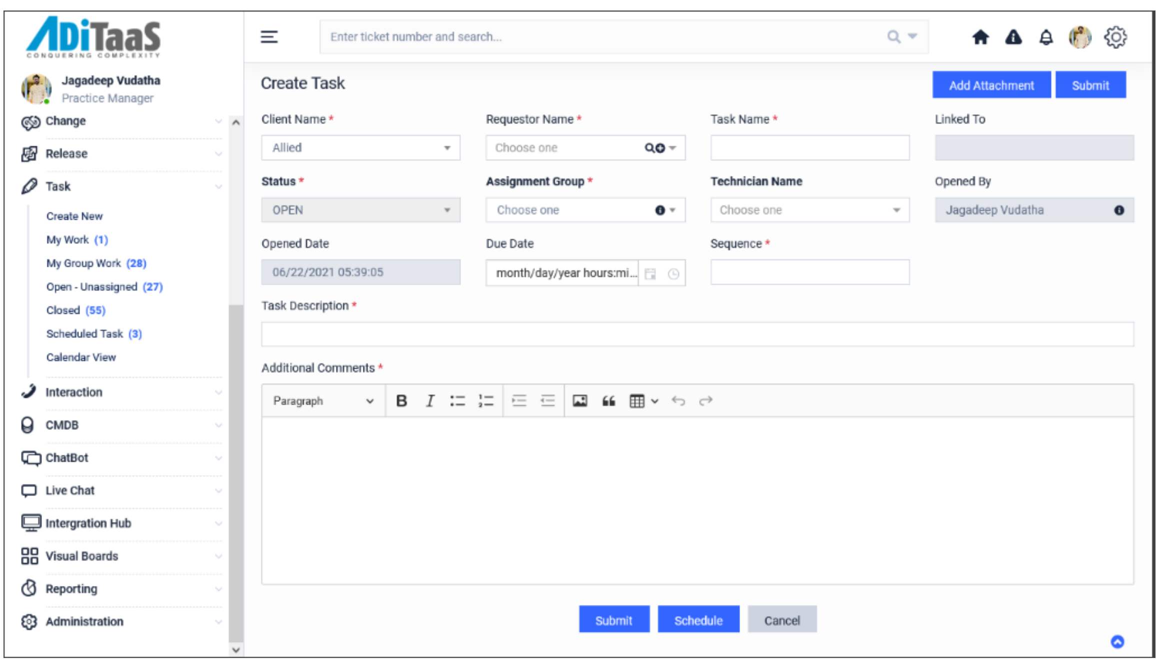
i. **Sequence**- Enter the task sequence number

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.

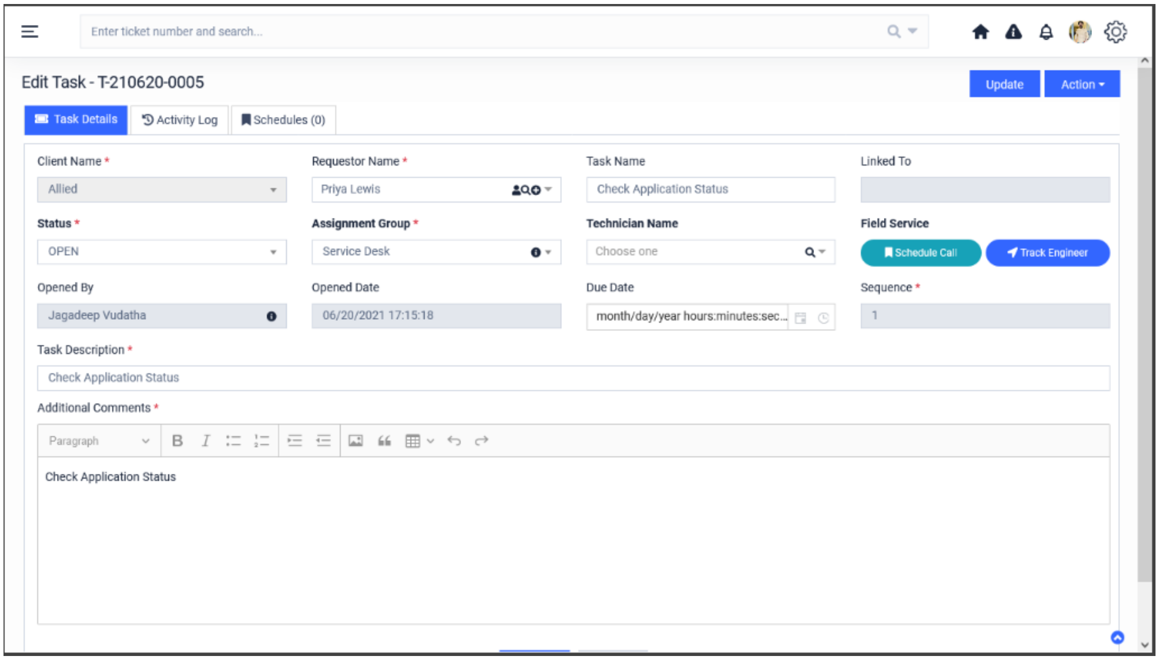
l. **Task Description:** Provide a relevant title to the task that will exactly summarize the task.

m. **Additional Comments:** Provide a detailed description with any other associated details relevant to the task.



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

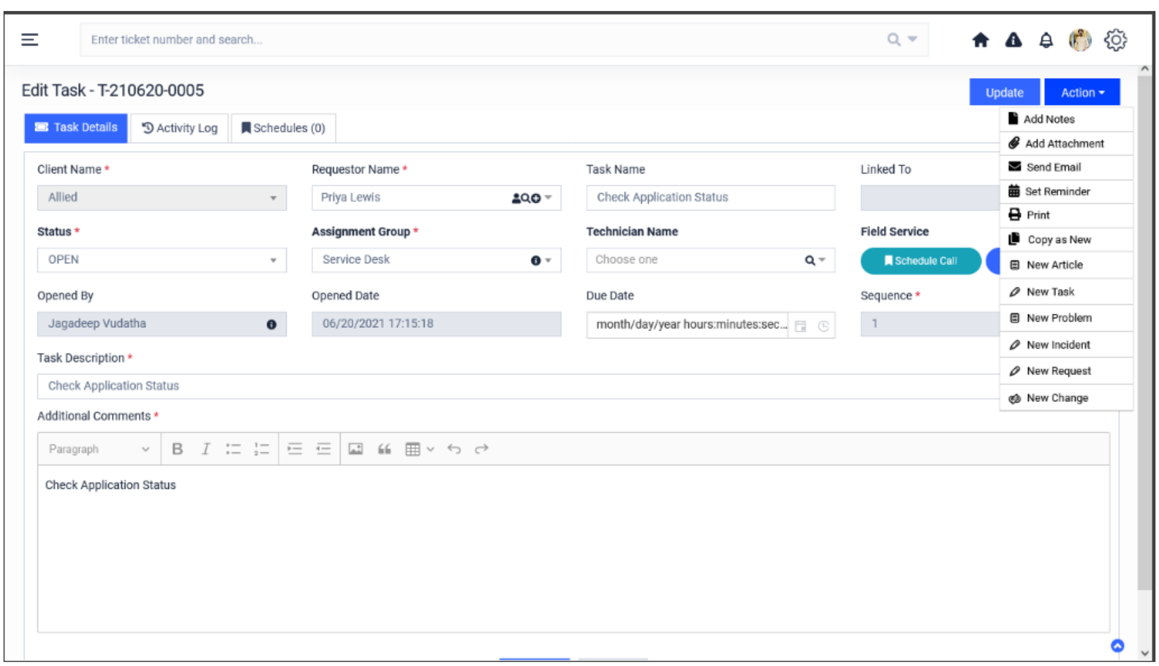
6. New task will be created with **unique task ID** and an email notification is sent to confirm that the ticket has been logged.



EDIT/ UPDATE TASK

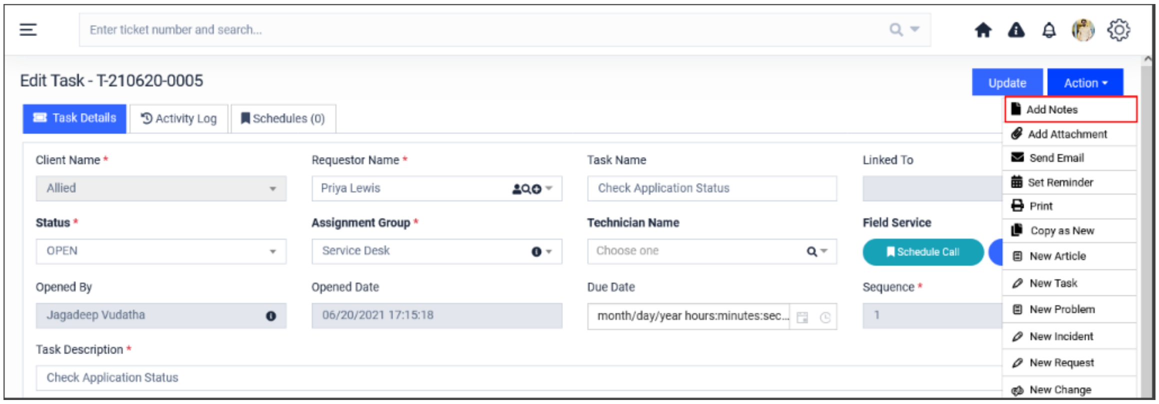
On successful creation of ticket, system will generate unique ticket id. Ticket id starts with date and number. **T** indicates task ticket.

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

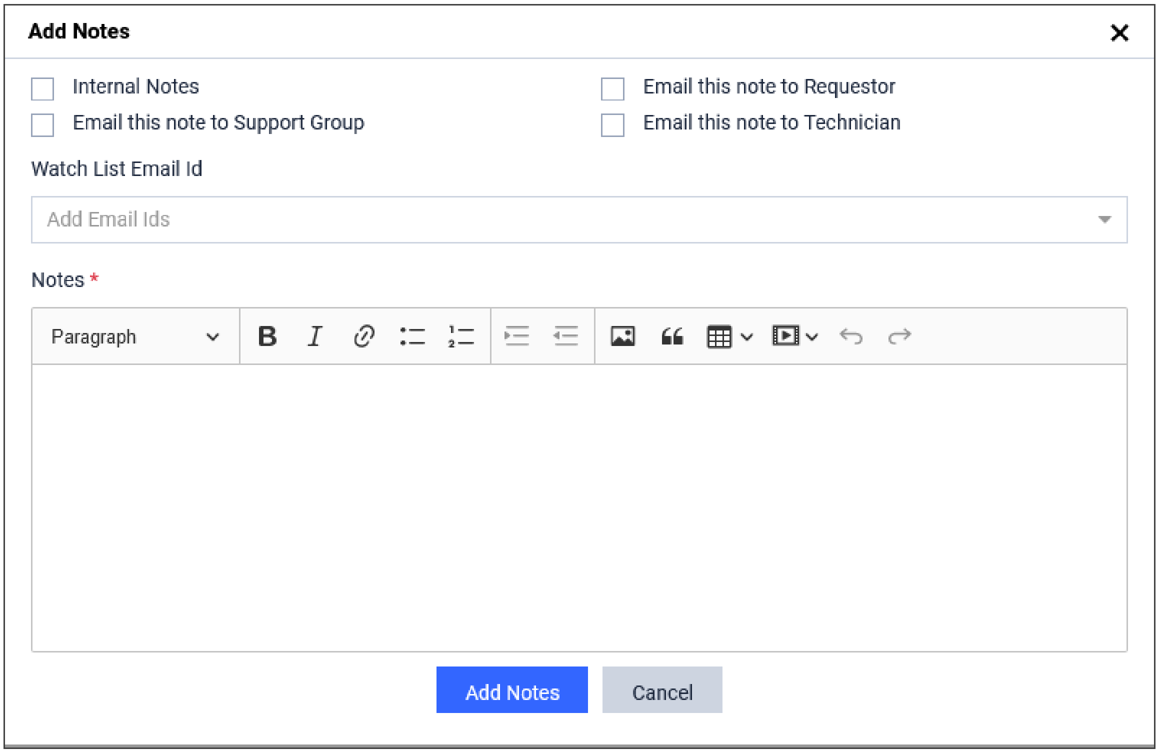
To add any additional information or work logs to ticket, click on **Action → Add Notes**



Add Notes dialog box will open

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.

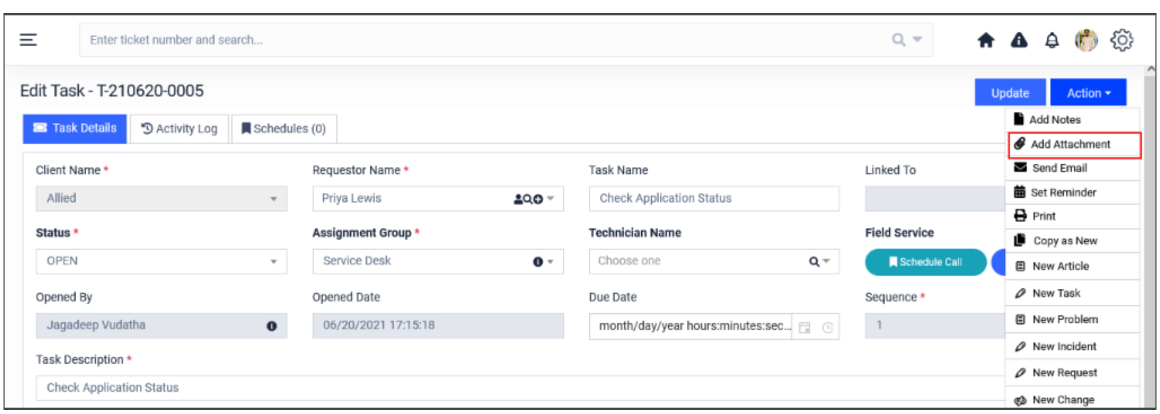


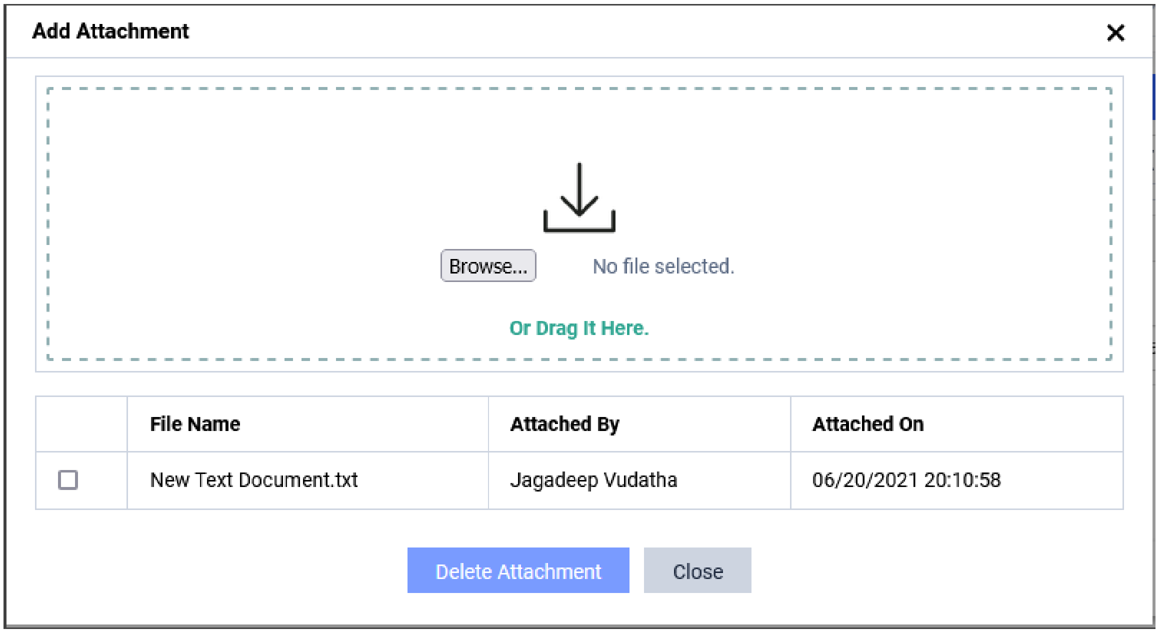
Enter the required comments/images/screenshots in the Notes section and click on Add Notes.

Added information will be visible in Activity Log.

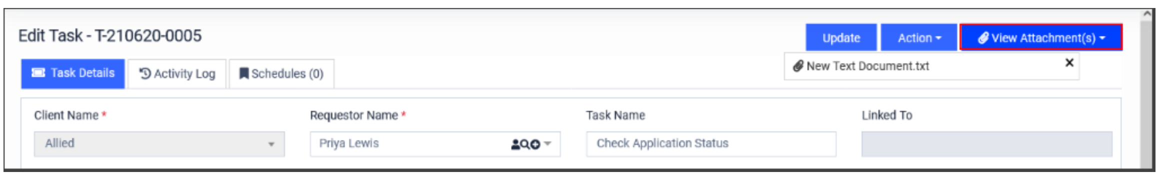
ADD ATTACHMENT:

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.



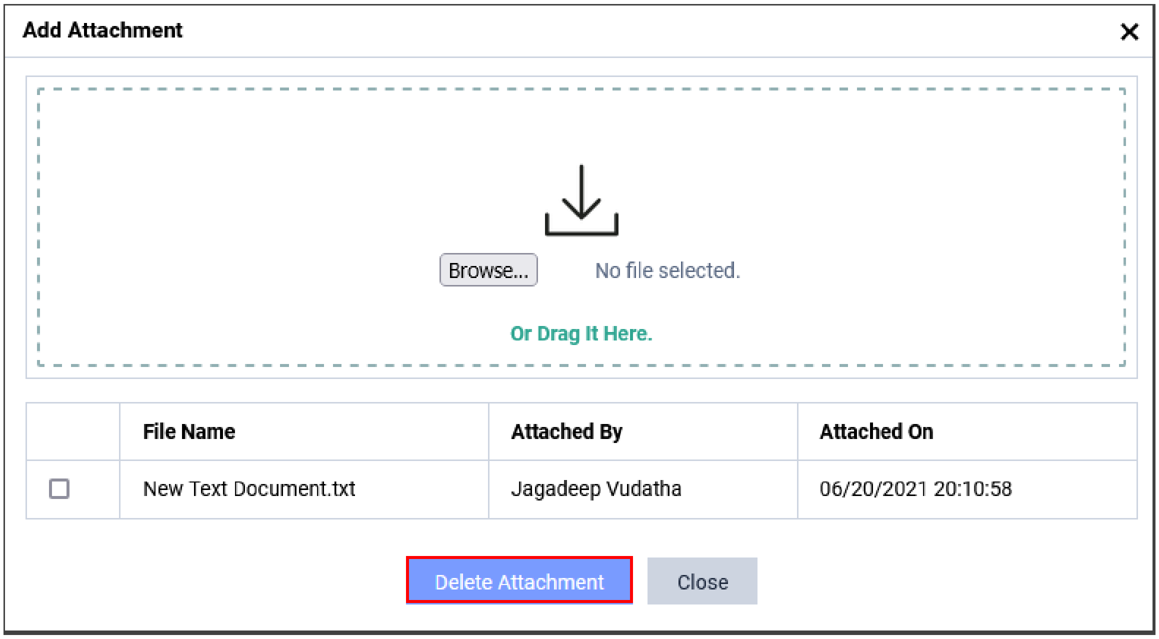


All Uploaded attachments will be visible Under '**View Attachment(s)**' tab.

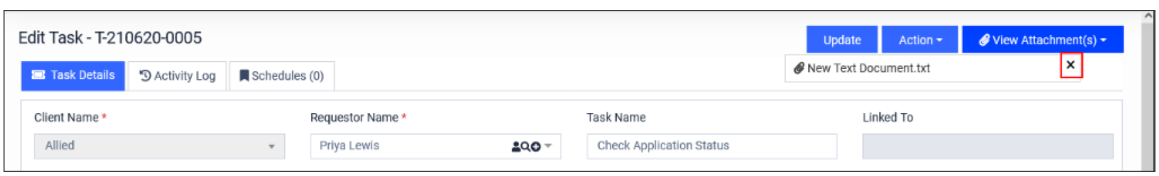


DELETE/ REMOVE ATTACHMENT:

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

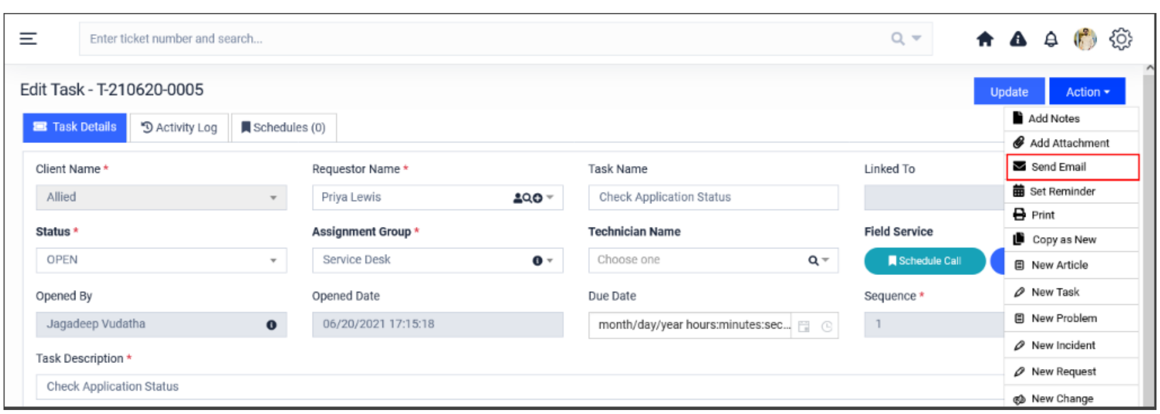


To quick delete an attachment , click on '**View Attachment(s)**' tab and go to respective attachment click on '**x**' placed next to it.

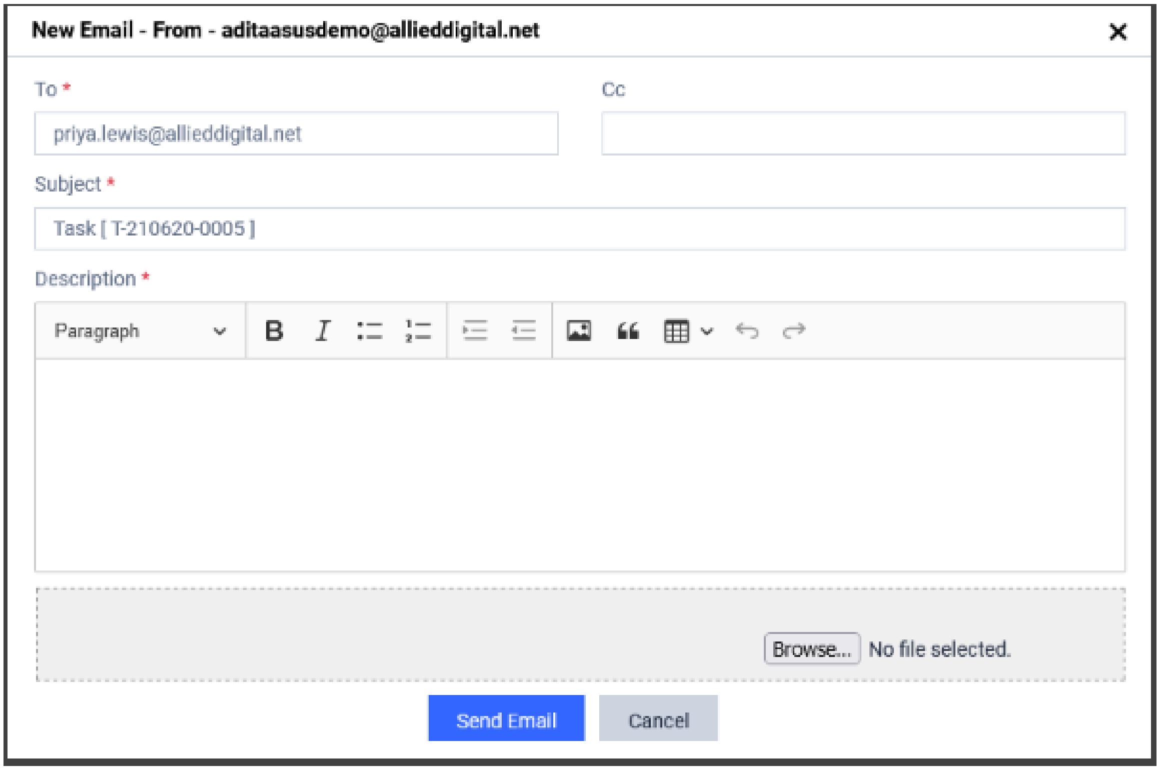


SEND MAIL:

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.

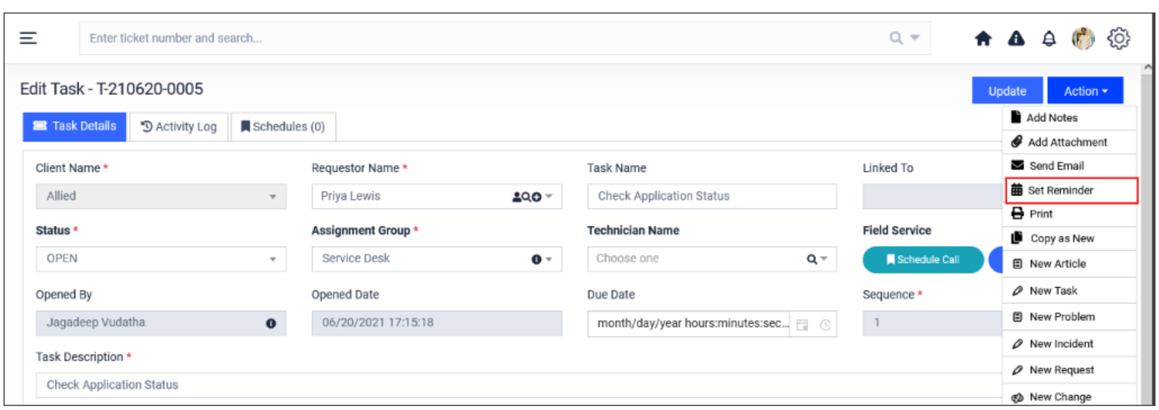


When complete, click on 'Send Email'. All actions are captured in Activity Log.

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.

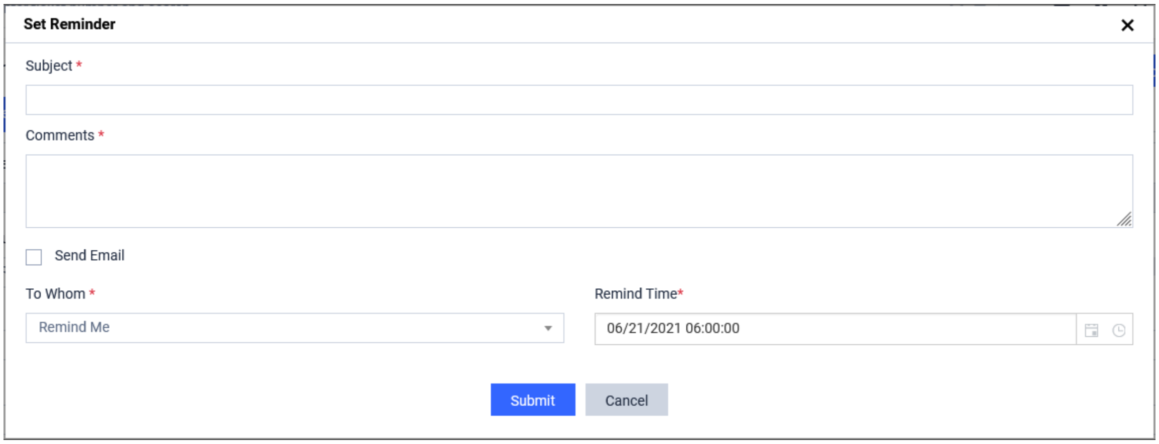
1. To a set reminder, click on **Action → Set Reminder.**



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.

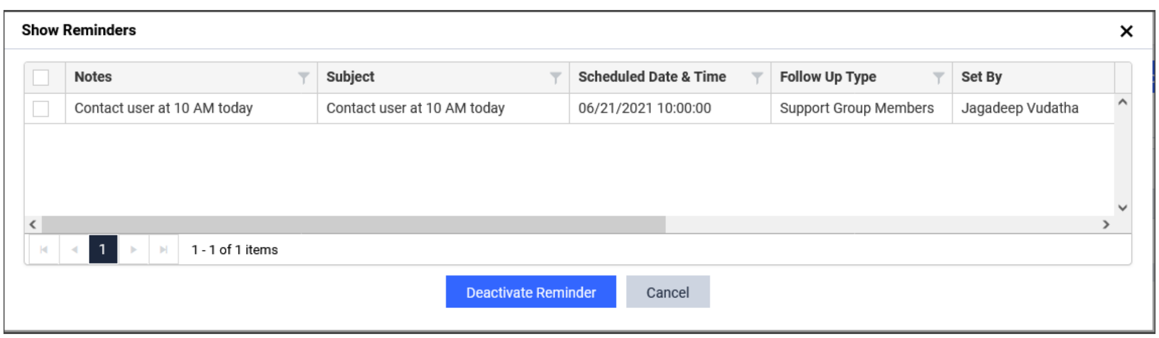
a. **Remind me** – Reminder will be set for logged in agent.
b. **Support Group Members**- Reminder will be set for selected support group.
c. **Some else** – Provides option to set a reminder to specific person.

5. **Remind Time** –Select date/time to set a reminder.



SHOW REMINDERS

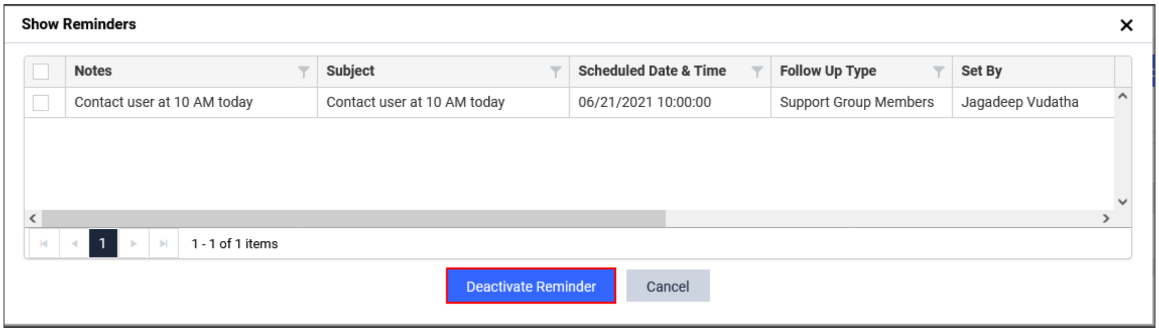
All scheduled reminders will be visible under **Action → Show Reminders** as well as on **Calendar view.**



Deactivate the Reminder

Scheduled reminder can be deactivated with simple following steps.

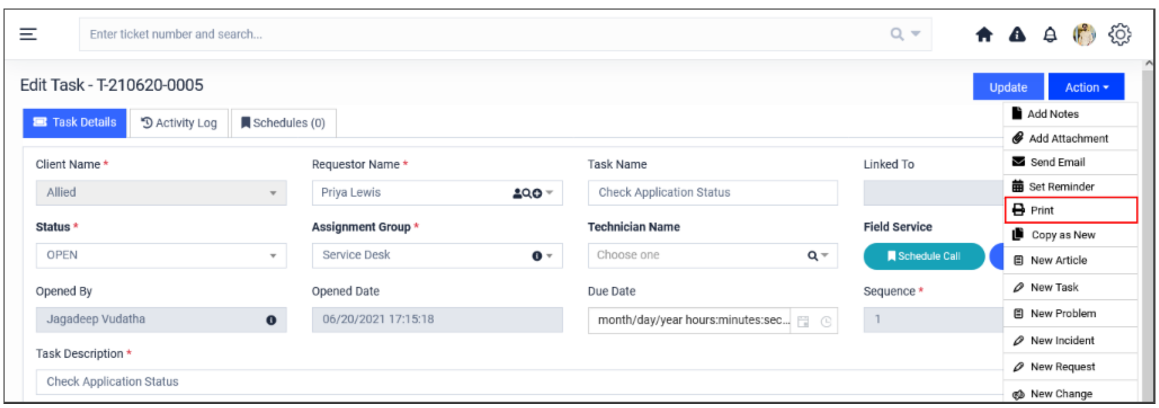
1. Go to **Action→Show Reminders**
2. Select reminder by clicking on checkbox and click on **Deactivate Reminder**
3. Reminder Status will be marked as deactivated.



PRINT 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**



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 :

Attachment removed On 06/22/2021 05:41:33 by user = Jagadeep Vudatha

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

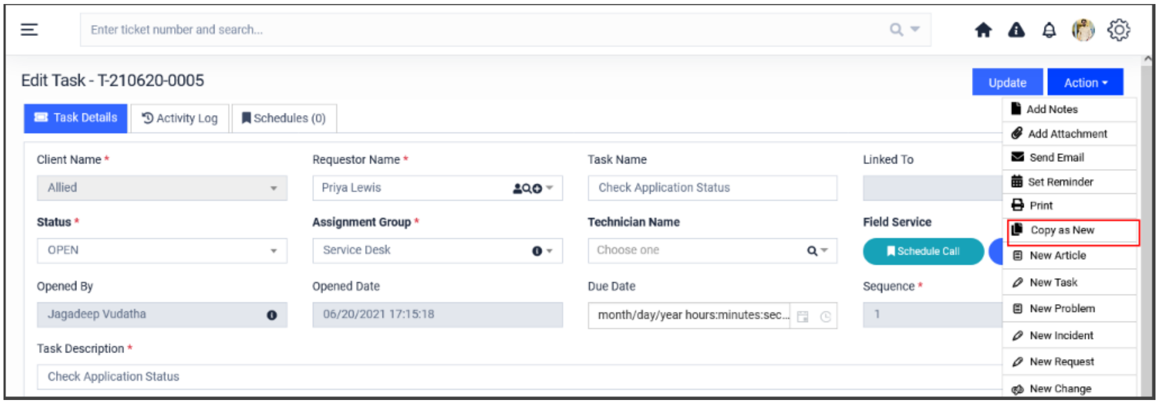
Attachment added on 06/22/2021 05:41:14 by user = Jagadeep Vudatha

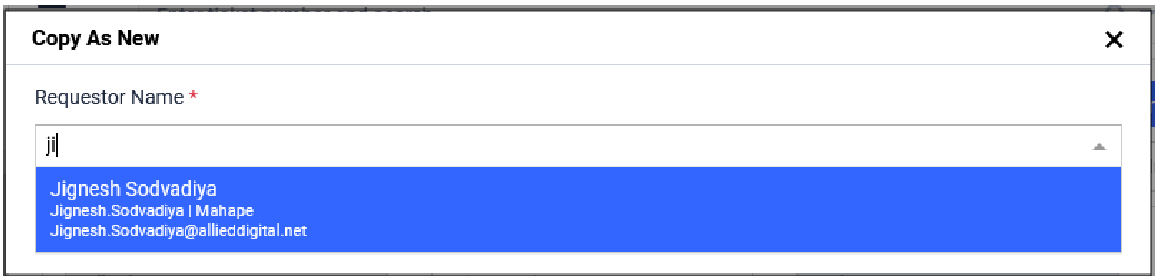
Attachment Name:- New Text Document.txt, Added by user = Jagadeep Vudatha

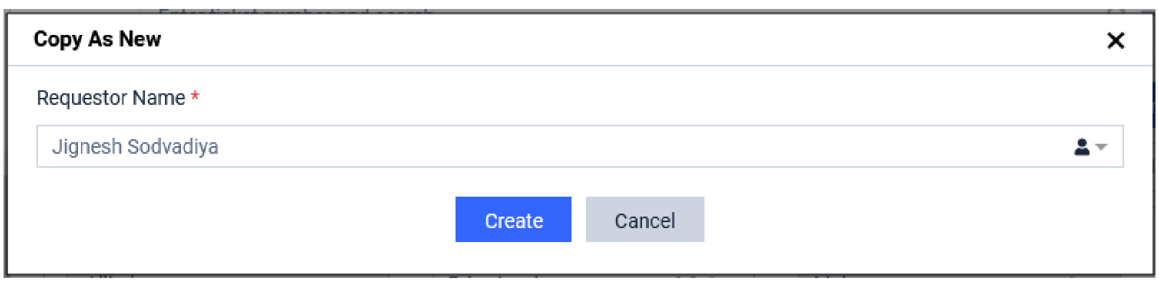
COPY AS NEW

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**



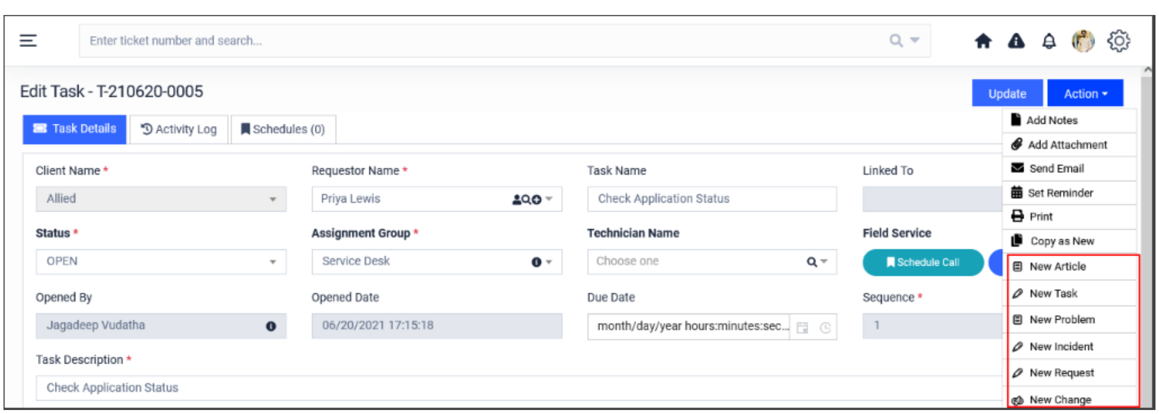




3. Search and select required **Requestor Name** and Click **Create.**

QUICK LINKS TO CREATE TICKETS FROM TASK

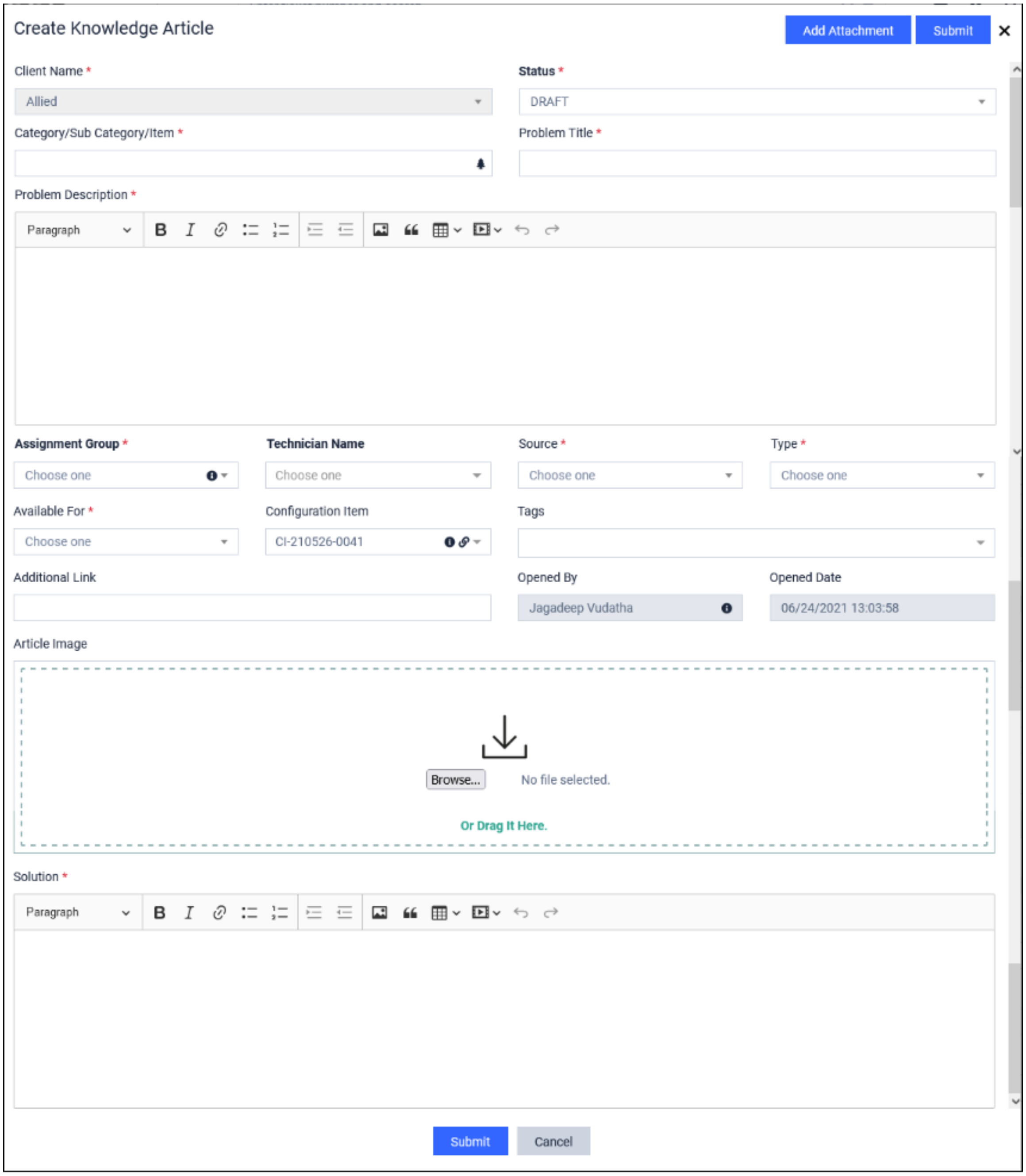
Following links helps to create other module tickets from task ticket.



New Article

Allows to raise an article from task ticket.

- Go to **Action → New Article**
- Enter the new article details and click on submit

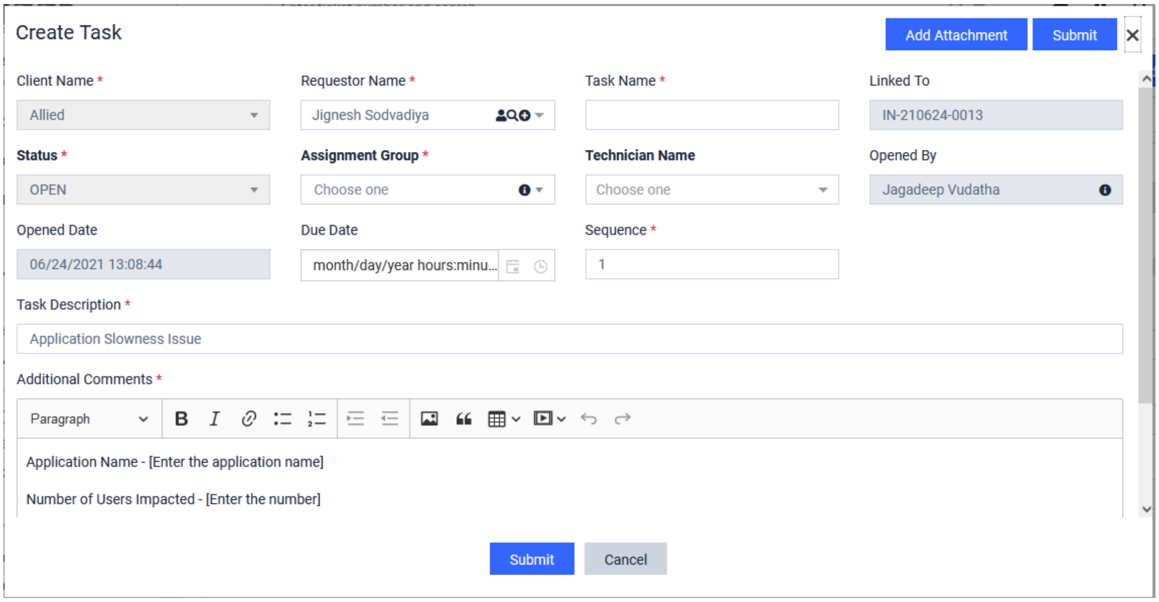


New Task

Allows to raise a new task ticket from task ticket.

- Go to **Action → New Task**

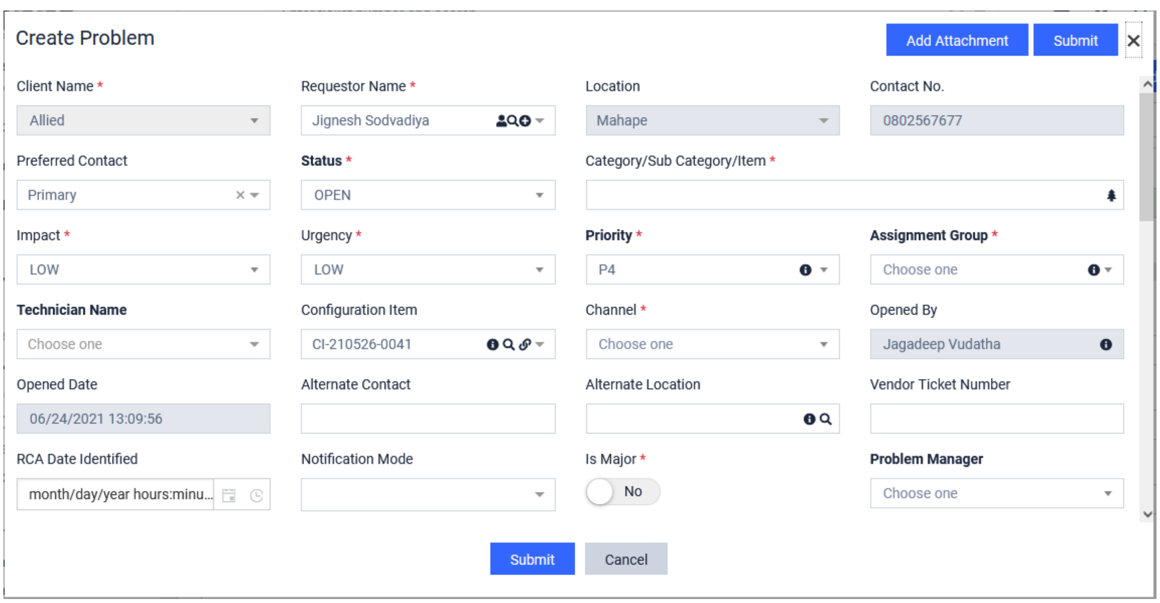
- Enter the new task details and click on submit



New Problem

Allows to raise a new problem ticket from task ticket.

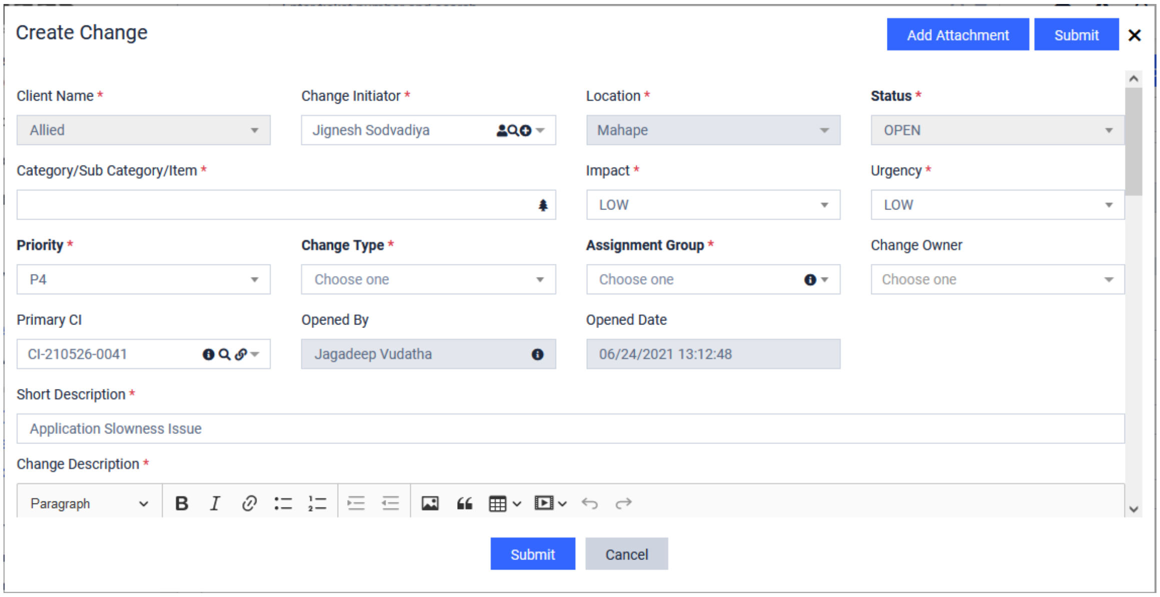
- Go to **Action → New Problem**
- Enter the new problem details and click on submit



New Change

Allows to raise a new change ticket from task ticket.

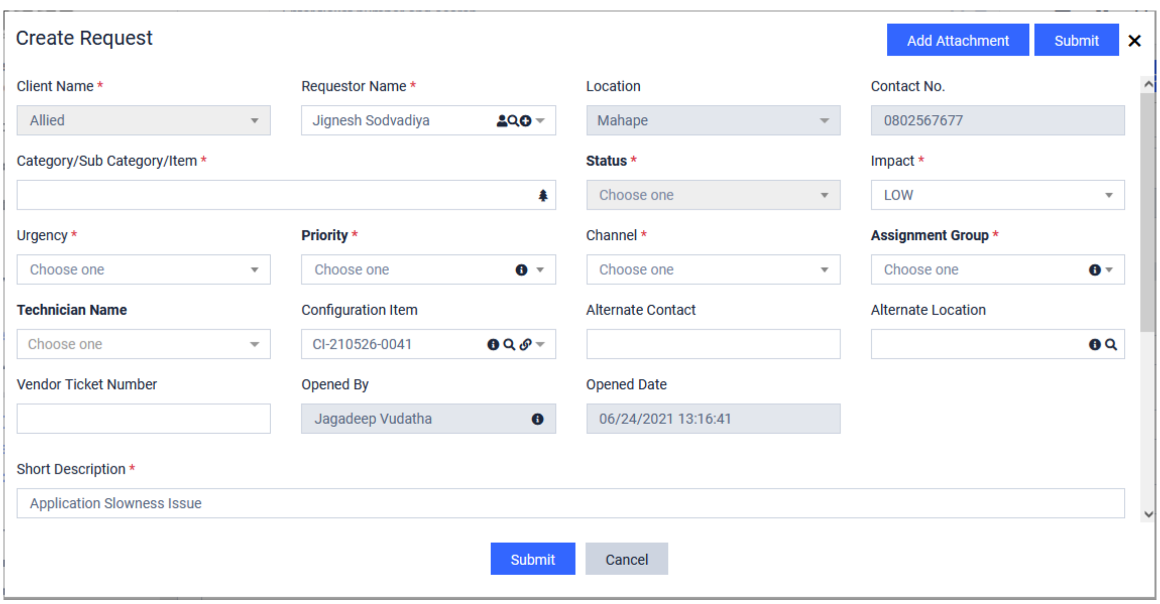
- Go to **Action → New Change**
- Enter the new change details and click on submit



New Request

Allows to raise a new request ticket from task ticket.

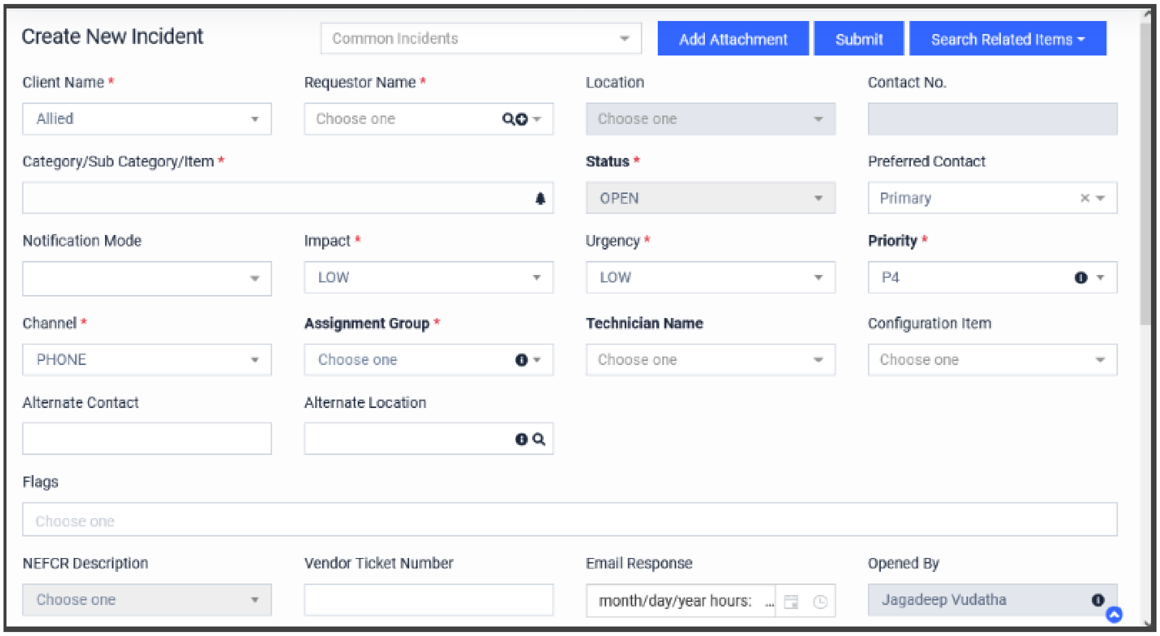
- Go to **Action → New Request**
- Enter the new request details and click on submit



New Incident

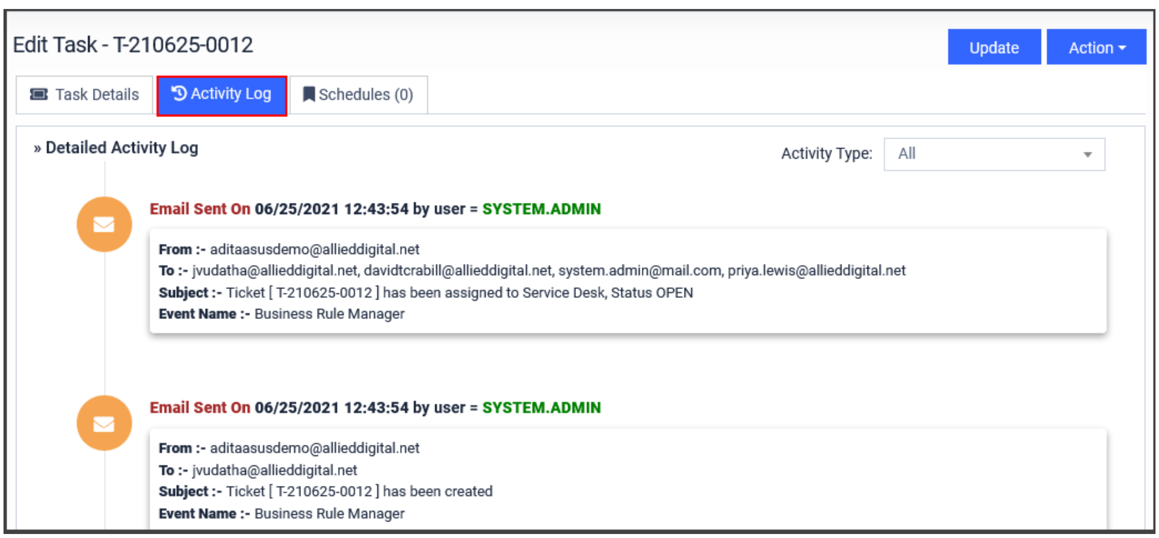
Allows to raise a new request ticket from task ticket.

- Go to **Action → New Incident**
- Enter the new incident details and click on submit



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.

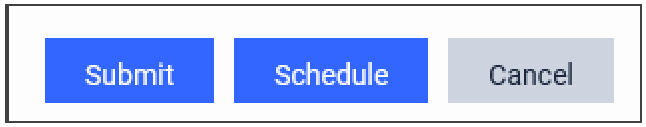


Note: Logs in the tool protected from alteration after-the-fact.

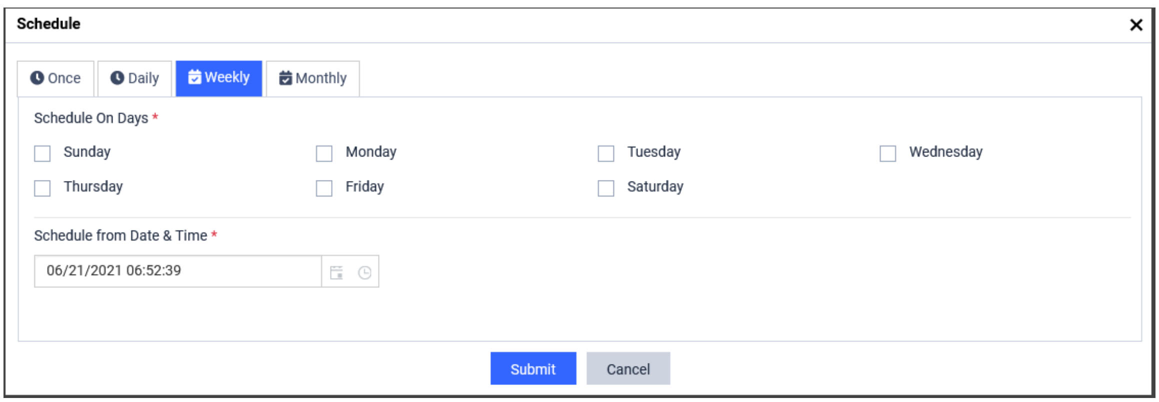
SCHEDULED TASKS

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**.**

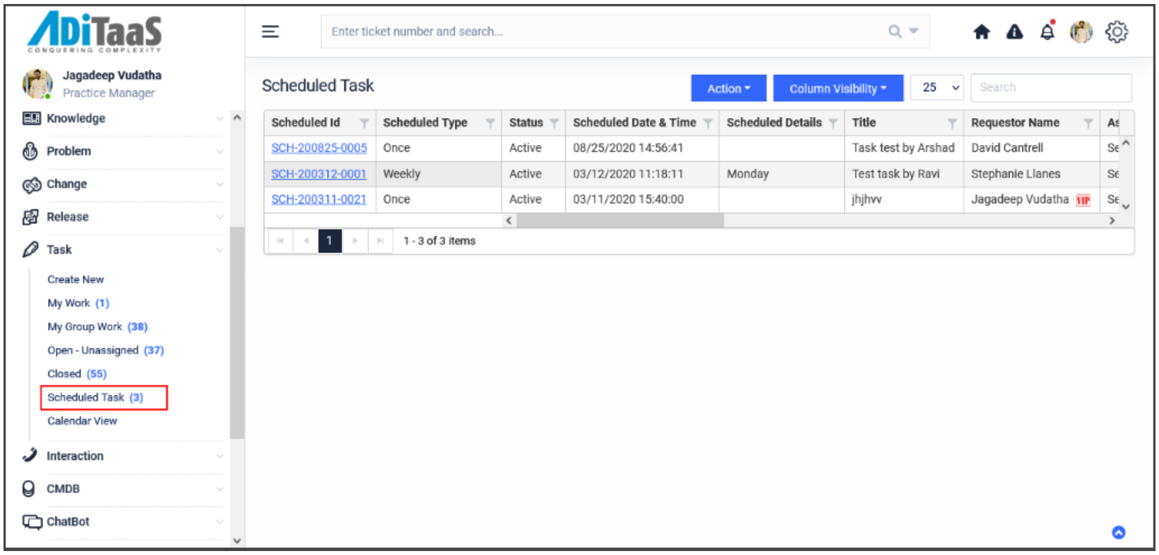


3. Displays scheduled dialog box, Select Scheduler Type, Schedule from Date & Time
4. Click on **Submit**



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**



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 3rd 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.

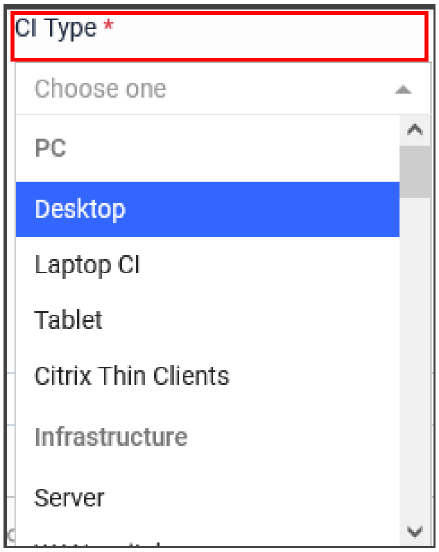
   a. **Client Name**- This is a mandatory field and data is auto populated with client information.
   b. **Requestor Name**- Mandatory field. Select contact details of user who has reported issue. If contact is not present in the application, then new contact can be created by using **add contact** feature. 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.



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.

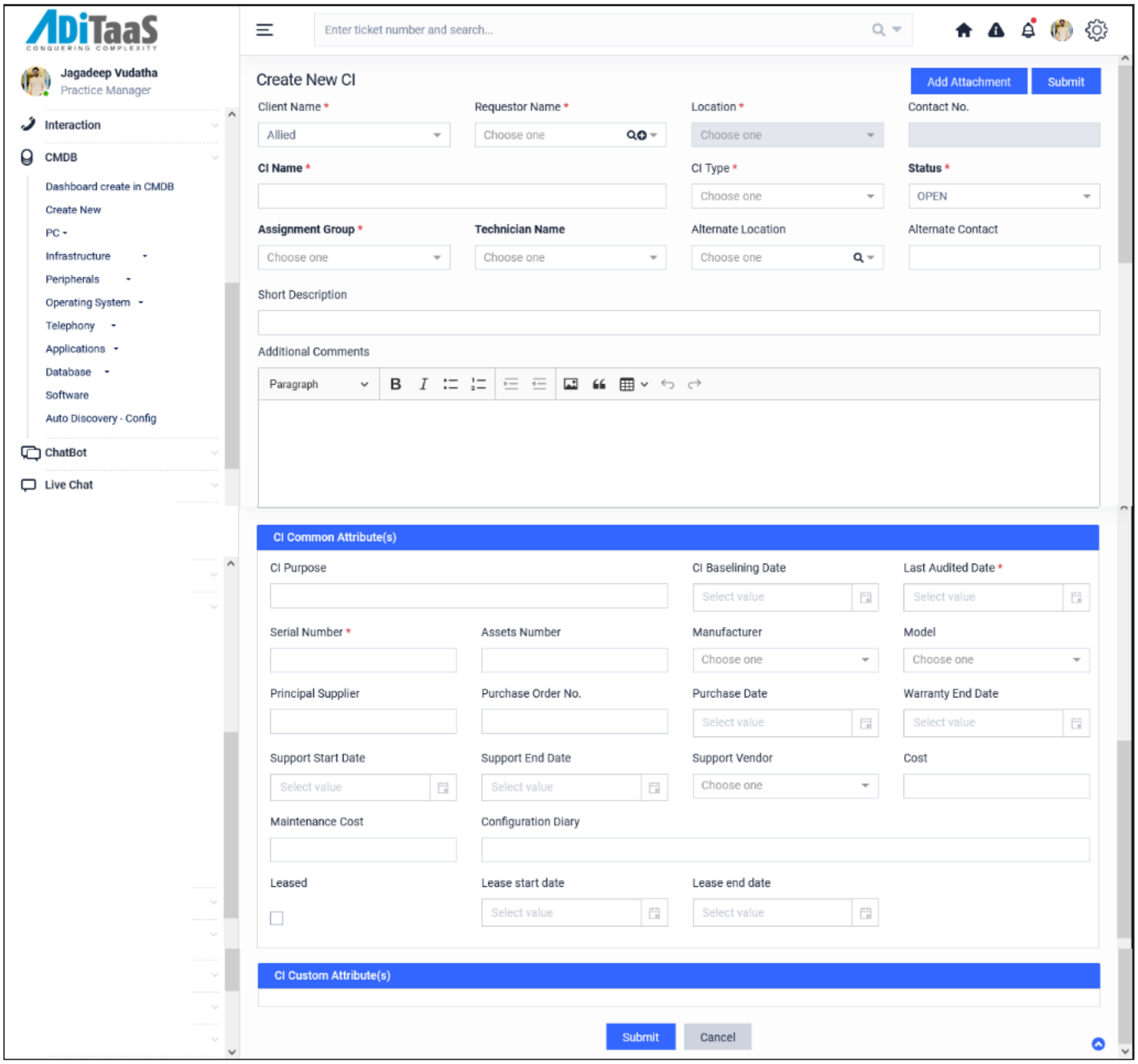
m. Additional Comments: Provide a detailed description with any other associated details relevant to the CI.

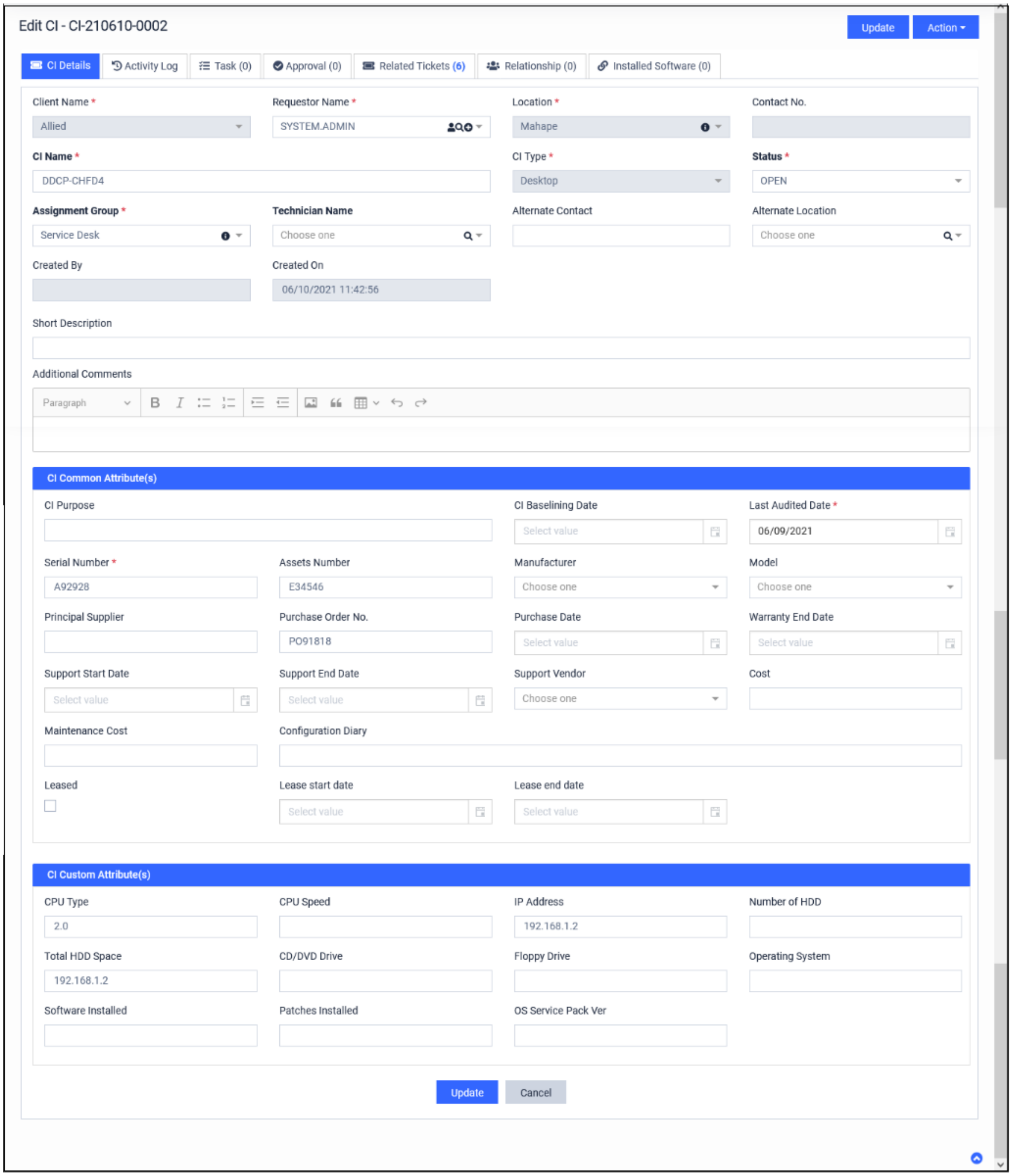
n. Common Attributes- Fill details for all CI Common attributes

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

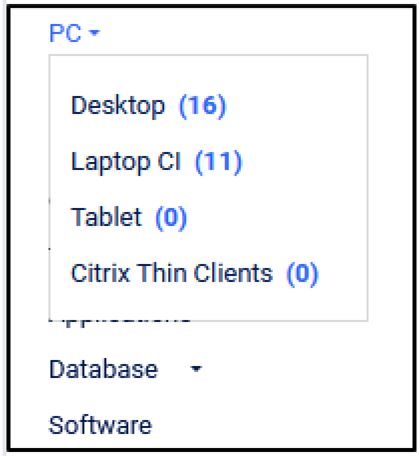
6. New CI will be created with **unique ID**.

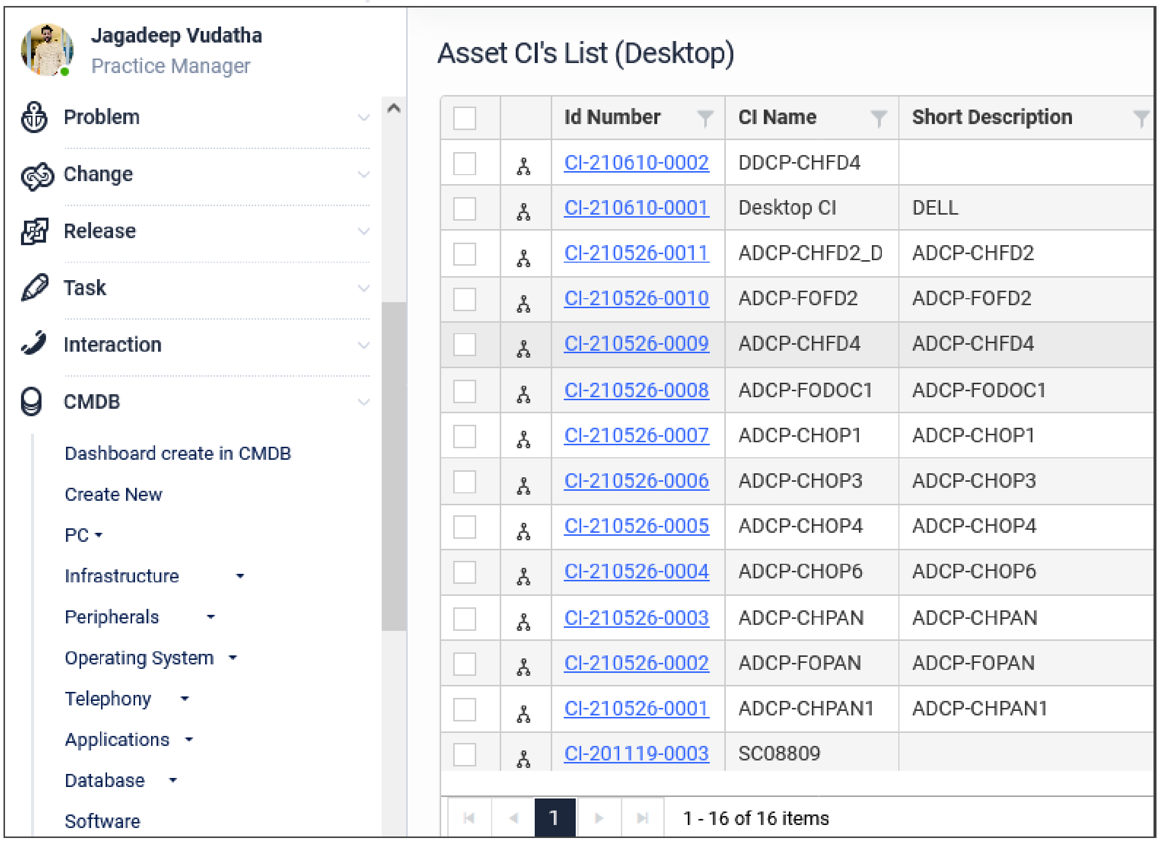

ADiTaaS
Enter ticket number and search...
Jagadeep Vudatha
Practice Manager
Interaction
CMDB
Dashboard create in CMDB
Create New
PC
Infrastructure
Peripherals
Operating System
Telephony
Applications
Database
Software
Auto Discovery - Config
ChatBot
Live Chat
Create New CI
Add Attachment
Submit
Client Name *
Allied
Requestor Name *
Choose one
Location *
Choose one
Contact No.
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
Paragraph
CI Common Attribute(s)
CI Purpose
CI Baselining Date
Select value
Last Audited Date *
Select value
Serial Number *
Assets Number
Manufacturer
Choose one
Model
Choose one
Principal Supplier
Purchase Order No.
Purchase Date
Select value
Warranty End Date
Select value
Support Start Date
Select value
Support End Date
Select value
Support Vendor
Choose one
Cost
Maintenance Cost
Configuration Diary
Leased
Lease start date
Select value
Lease end date
Select value
CI Custom Attribute(s)
Submit
Cancel

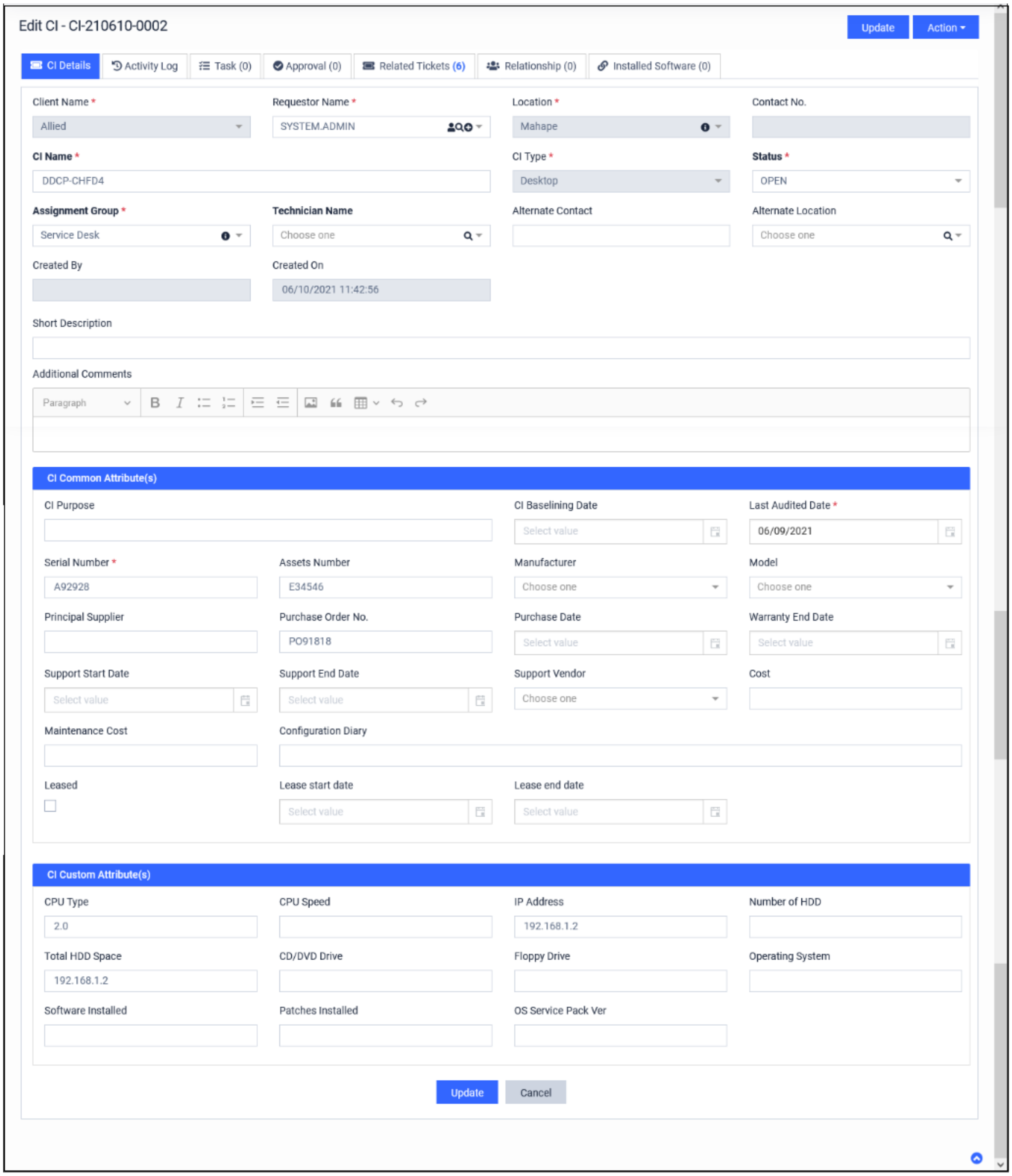


VIEW/ EDIT CI

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.

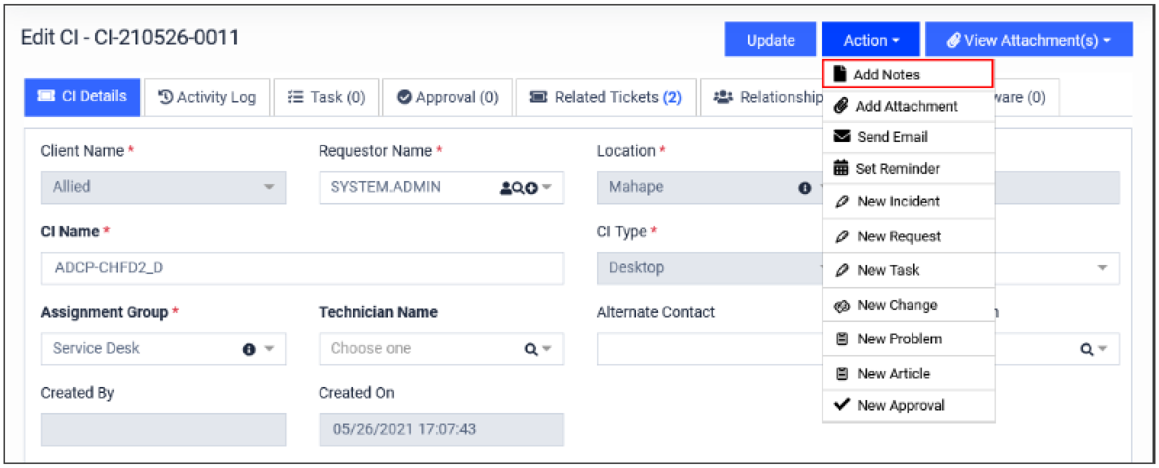

PC
Desktop (16)
Laptop CI (11)
Tablet (0)
Citrix Thin Clients (0)
Database
Software


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)
Id Number
CI Name
Short Description
CI-210610-0002 DDCP-CHFD4
CI-210610-0001 Desktop CI DELL
CI-210526-0011 ADCP-CHFD2_D ADCP-CHFD2
CI-210526-0010 ADCP-FOFD2 ADCP-FOFD2
CI-210526-0009 ADCP-CHFD4 ADCP-CHFD4
CI-210526-0008 ADCP-FODOC1 ADCP-FODOC1
CI-210526-0007 ADCP-CHOP1 ADCP-CHOP1
CI-210526-0006 ADCP-CHOP3 ADCP-CHOP3
CI-210526-0005 ADCP-CHOP4 ADCP-CHOP4
CI-210526-0004 ADCP-CHOP6 ADCP-CHOP6
CI-210526-0003 ADCP-CHPAN ADCP-CHPAN
CI-210526-0002 ADCP-FOPAN ADCP-FOPAN
CI-210526-0001 ADCP-CHPAN1 ADCP-CHPAN1
CI-201119-0003 SC08809
1
1 - 16 of 16 items

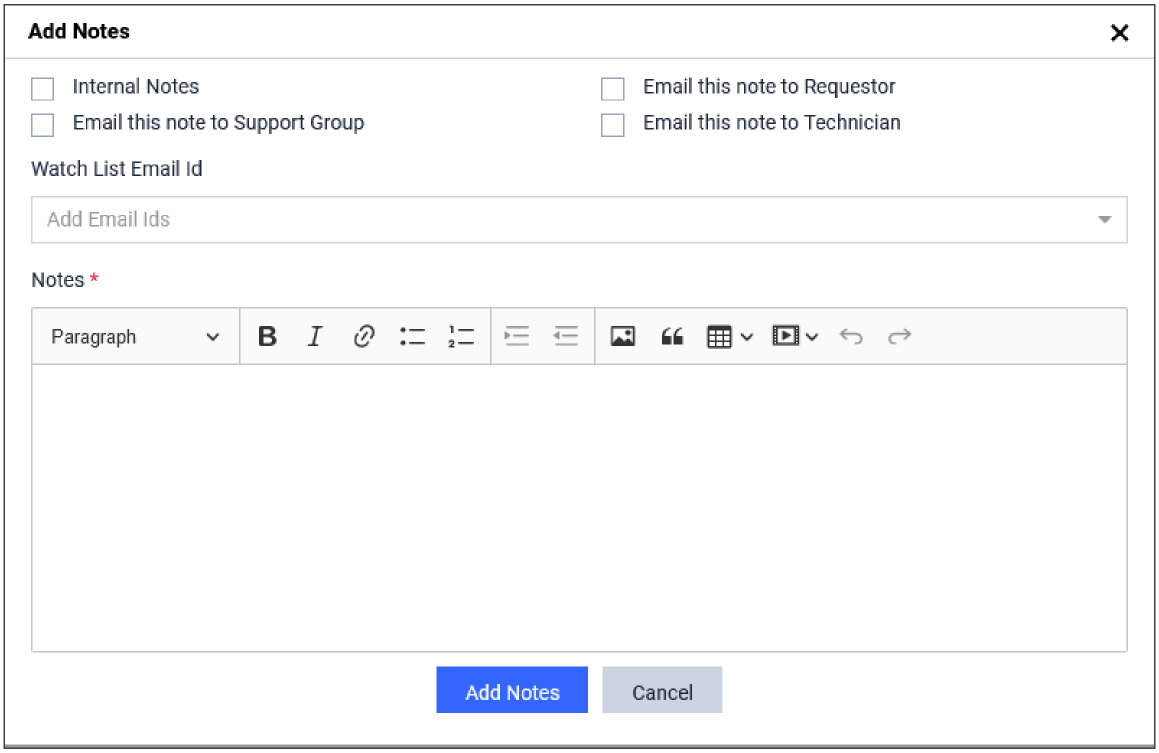


ADD NOTES

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



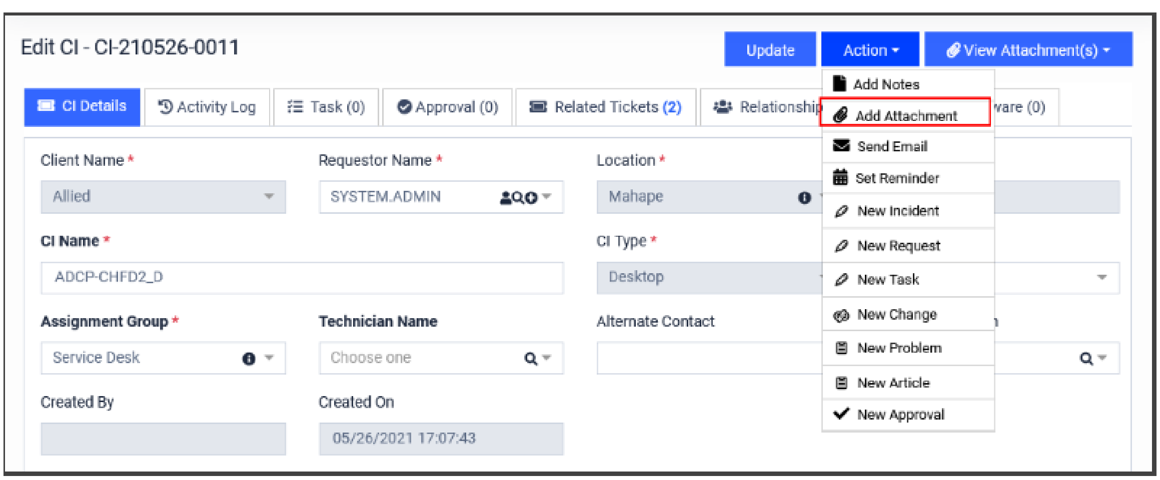
2. Add Notes dialog box will open
3. Click on checkbox to select required action items available on notes window
    a. **Internal Notes:** Notes will be visible only agents. By default added notes will be visible for both agents and end users.
    b. **Email this note to technician:** Email notification 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. **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.

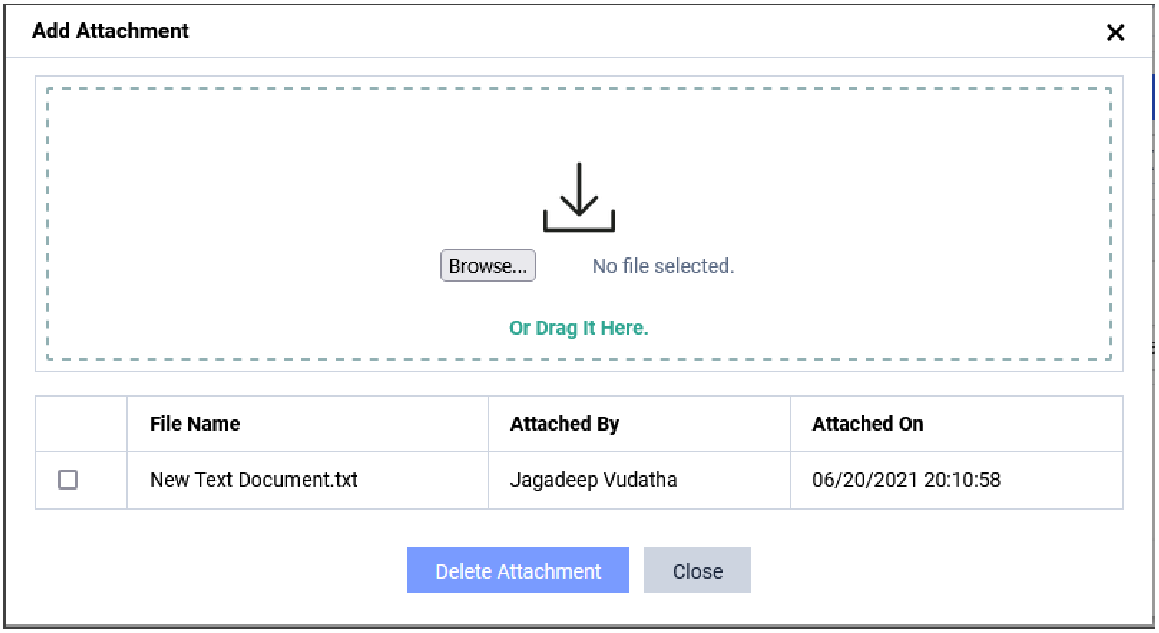


4. Enter the required comments/images/screenshots in the Notes section and click on **Add Notes.**
5. Added information will be visible in **Activity Log**.

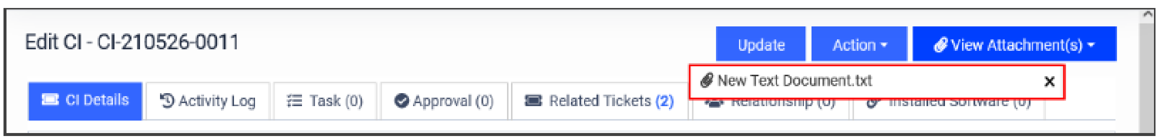
ADD ATTACHMENT:

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.



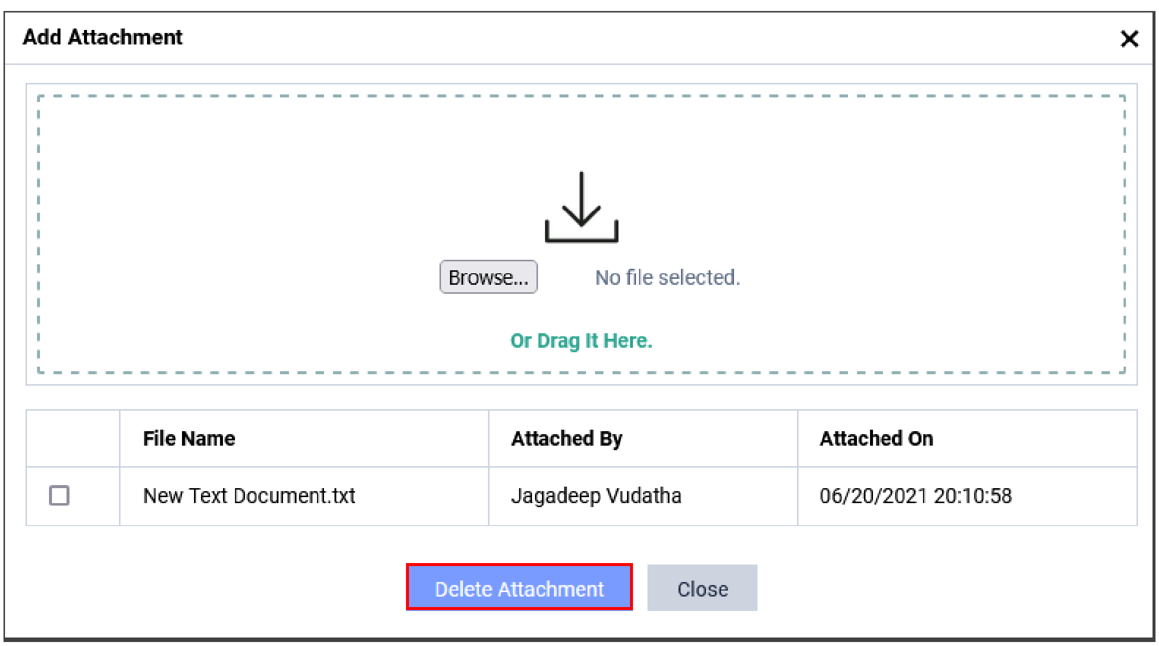


All Uploaded attachments will be visible Under '**View Attachment(s)**' tab.

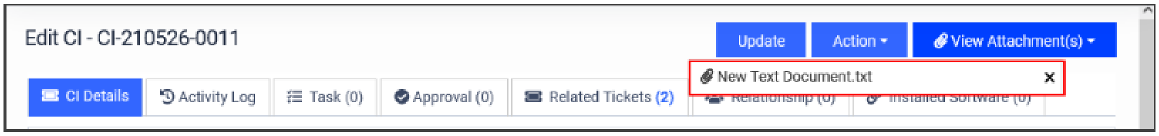


DELETE/ REMOVE ATTACHMENT:

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

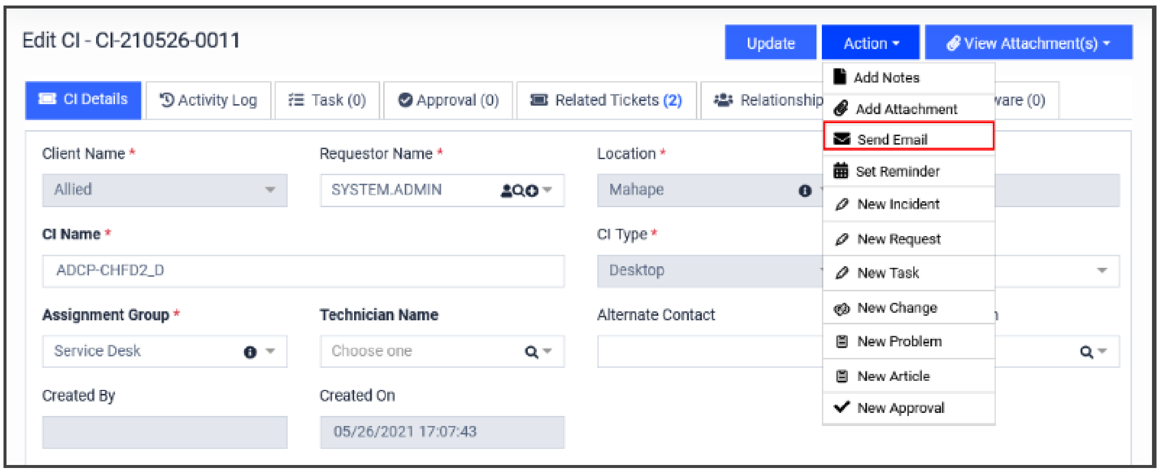


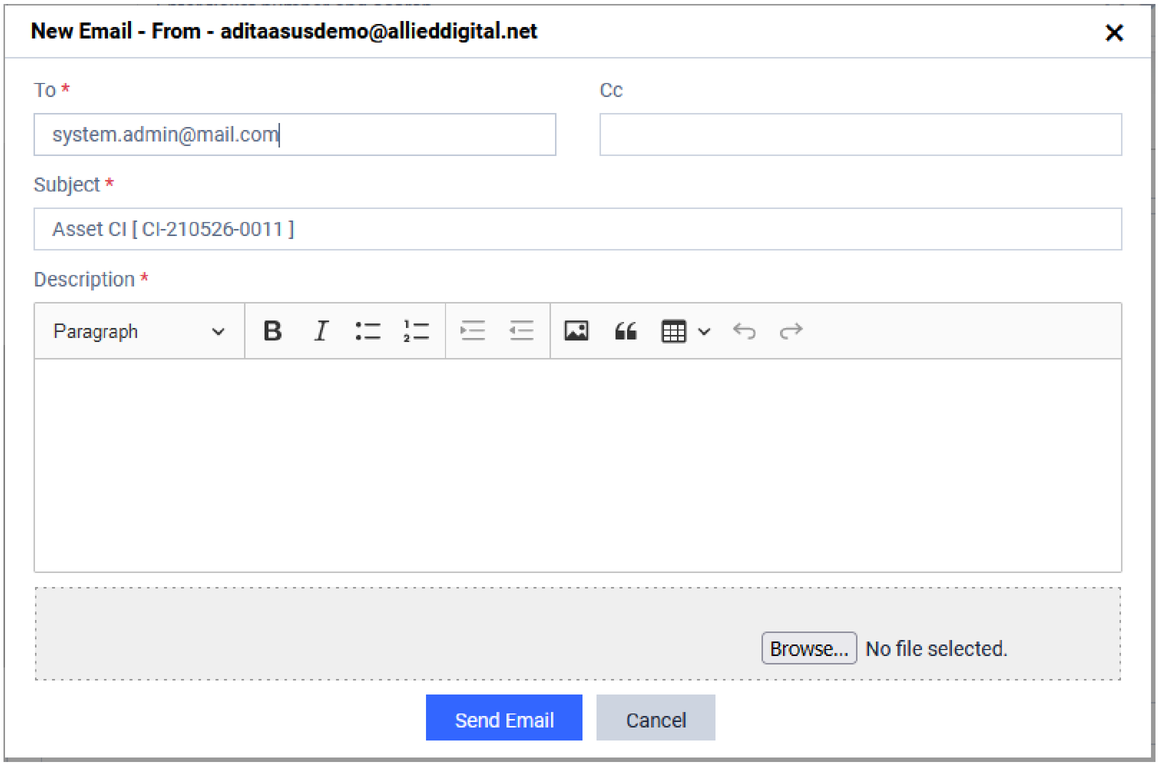
To quick delete an attachment , click on ‘**View Attachment(s)**’ tab and go to respective attachment click on ‘**x**’ placed next to it.



SEND MAIL:

1. To send an email from 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.



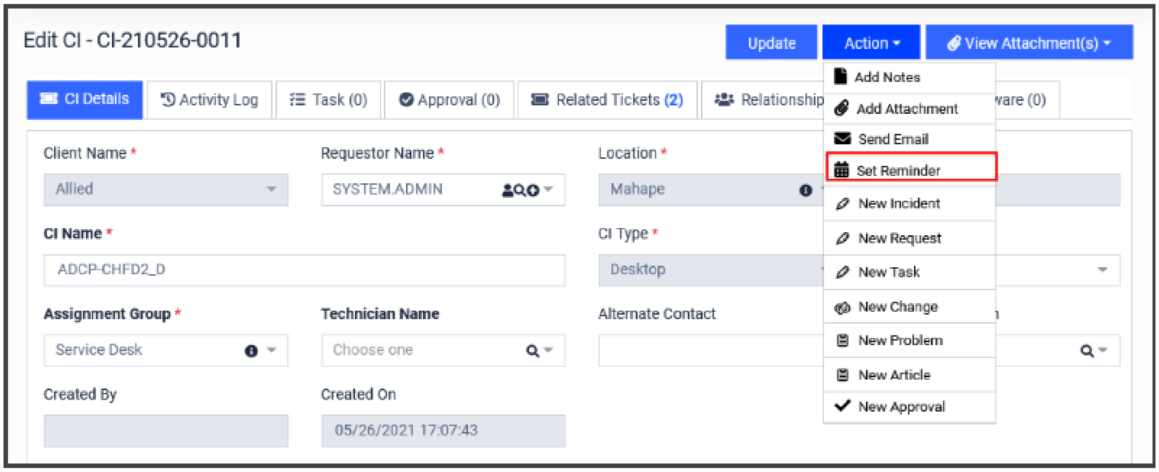


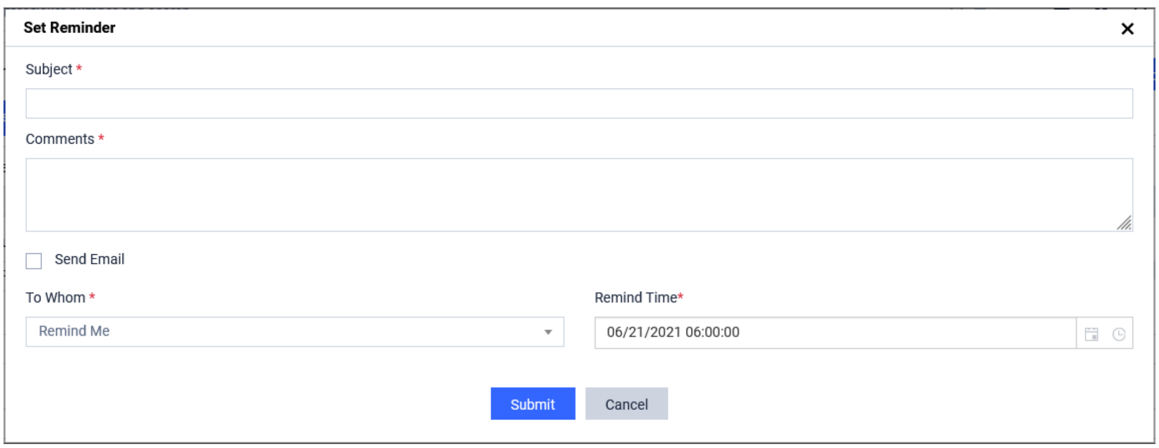
3. When complete, click on '**Send Email**'. All actions are captured in Activity Log.

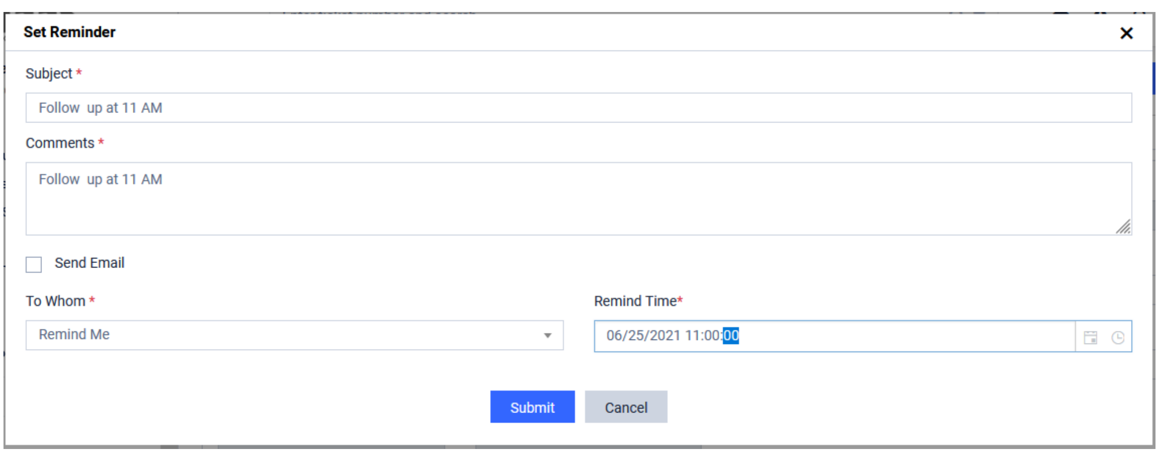
SET REMINDER

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.

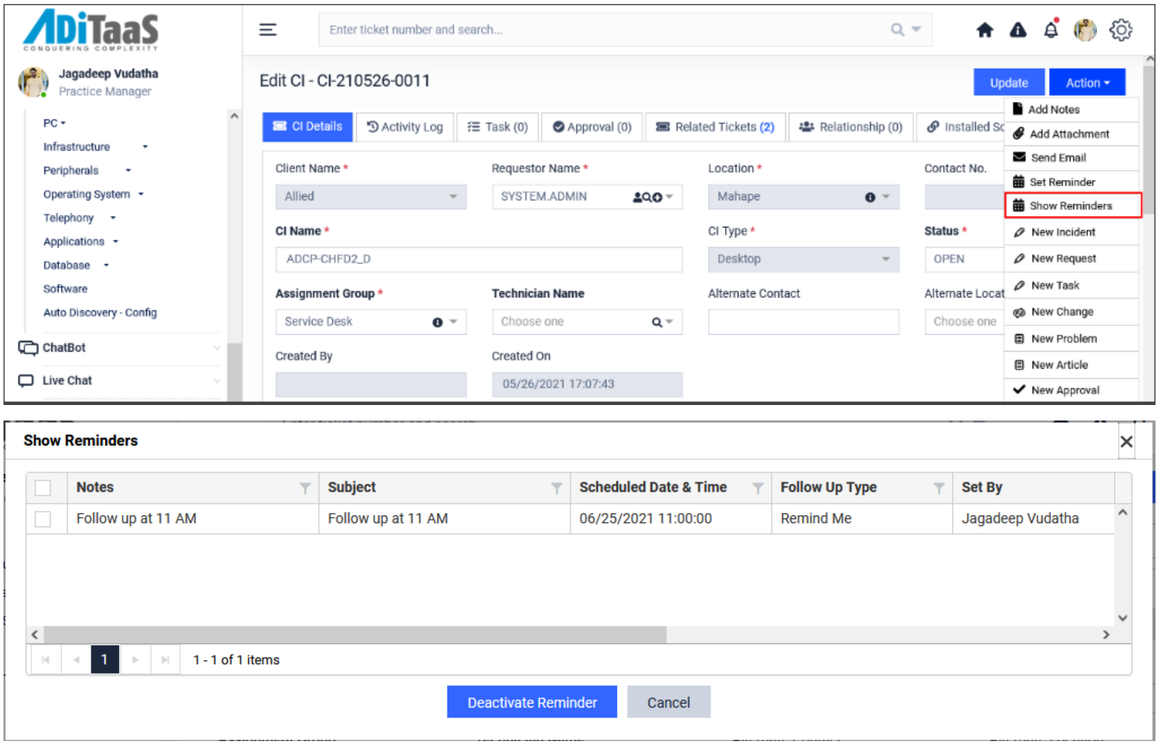






SHOW REMINDERS

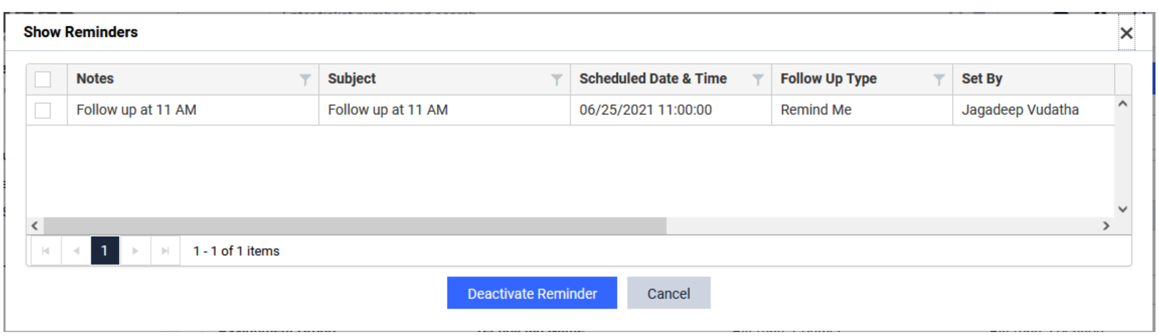
All scheduled reminders will be visible under **Action → Show Reminders.**



Deactivate the Reminder

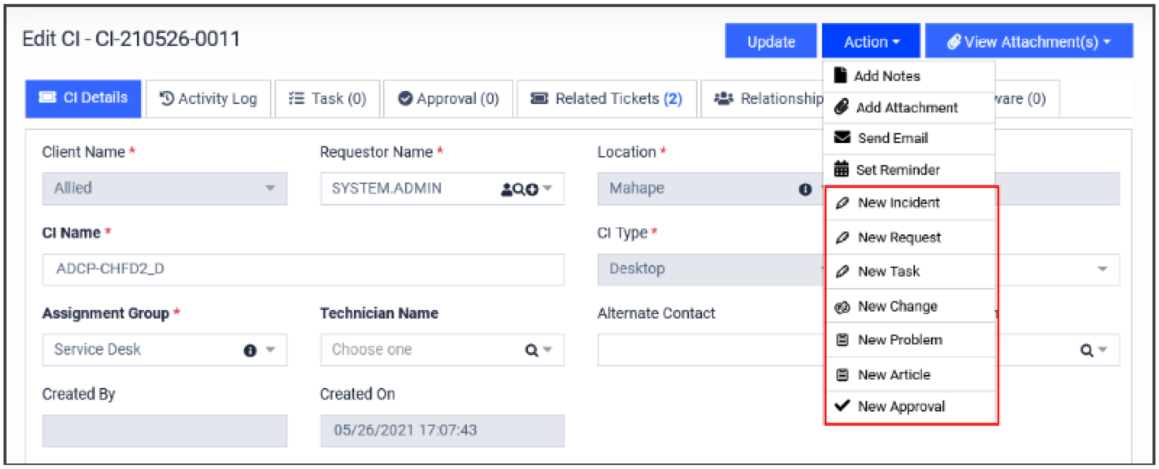
Scheduled reminder can be deactivated with simple following steps.

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.



QUICK LINKS TO CREATE TICKET FROM CI

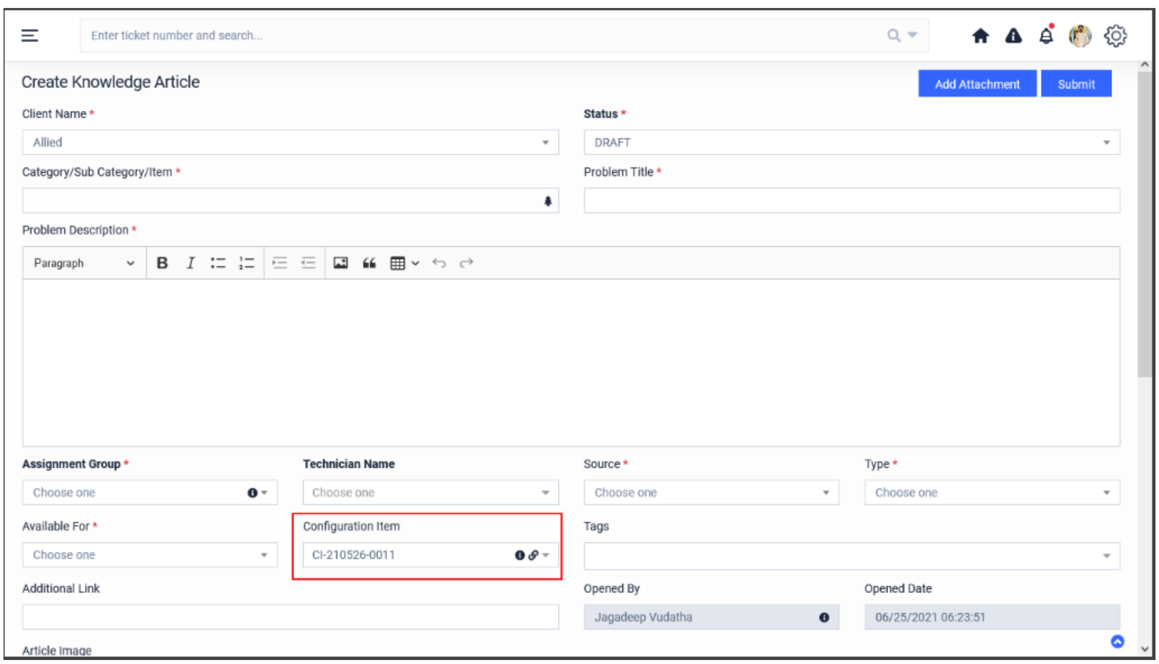
Following links helps to create other module tickets from CI.



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.

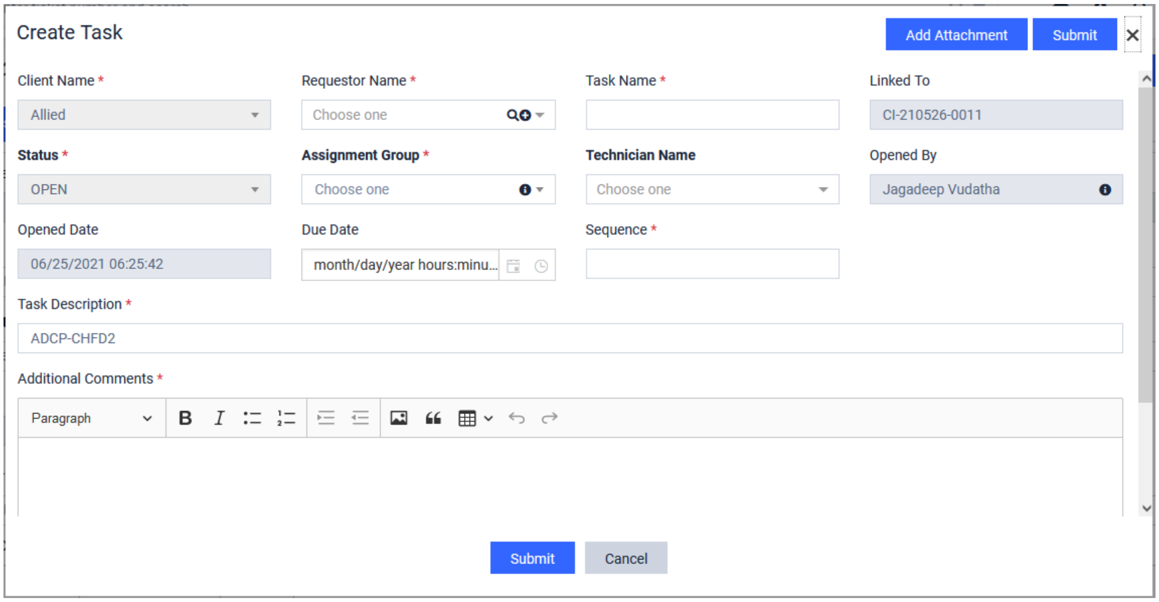


New Task

Allows to raise a new task ticket from CI

- Go to **Action → New Task**
- Enter the new task details and click on submit

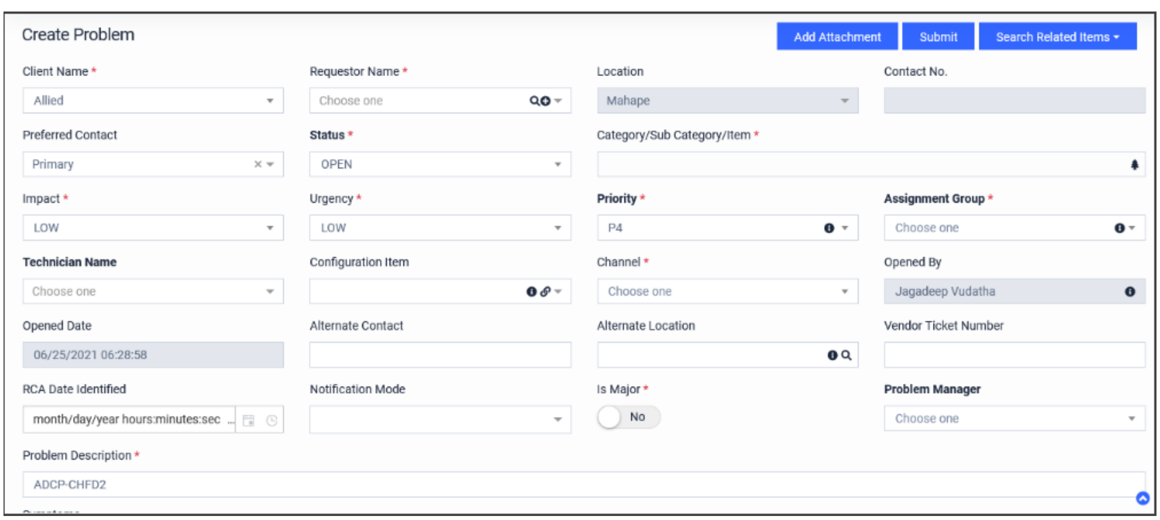
- New created task ticket will be linked to CI.



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.

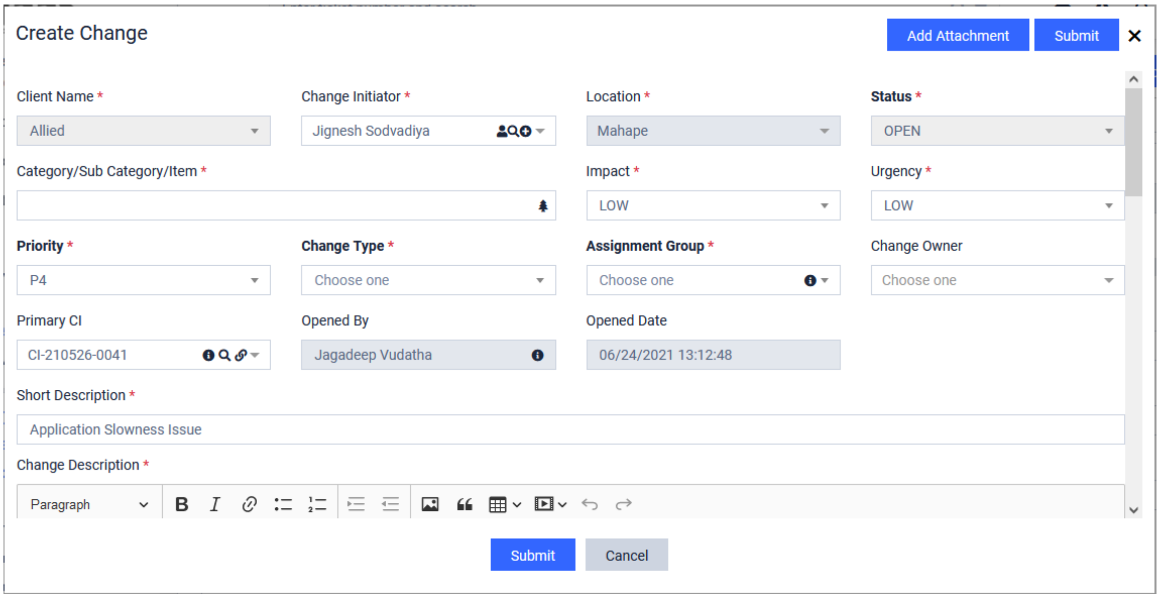


New Change

Allows to raise a new change ticket from CI

- Go to **Action → New Change**

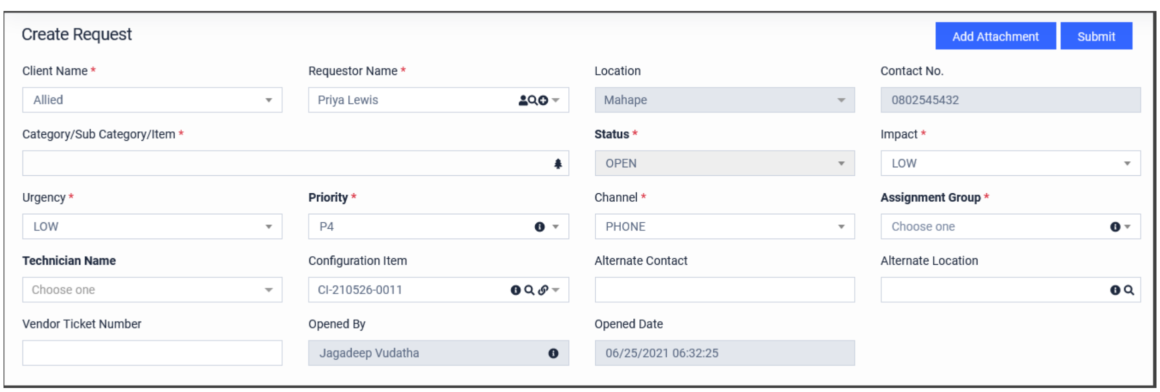
- Enter the new change details and click on submit
- CI will be linked to the Change.



New Request

Allows to raise a new request ticket from CI

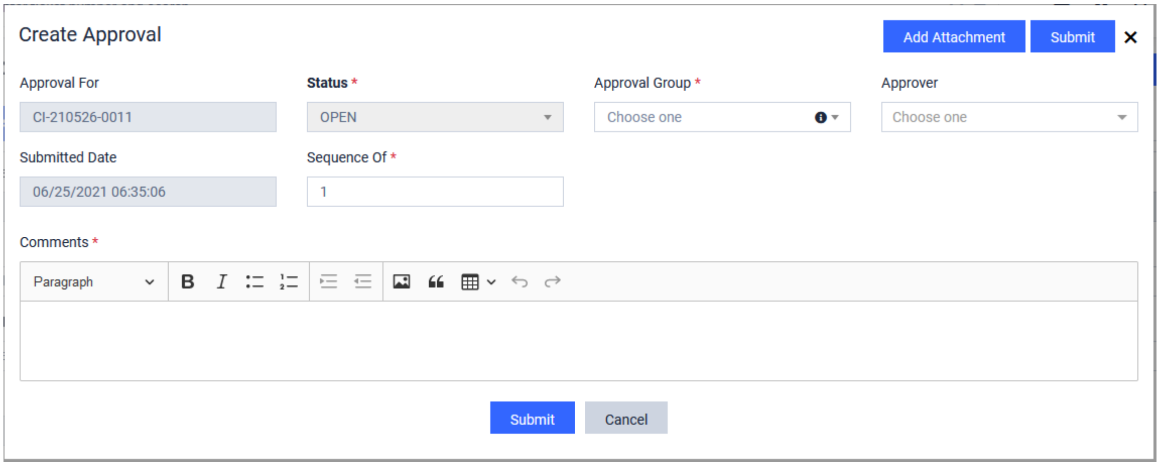
- Go to **Action → New Request**
- Enter the new request details and click on submit
- CI will be linked to the Request.



New Approval

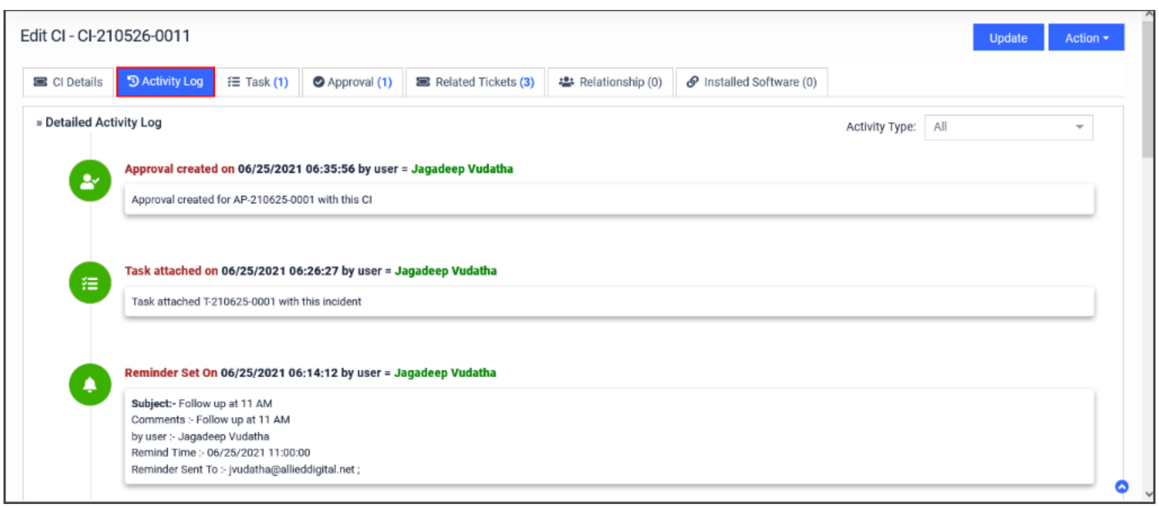
Allows to raise an approval ticket from CI

- Go to **Action → New Approval**
- Enter the new approval ticket details and click on submit
- New created approval ticket will be linked to CI



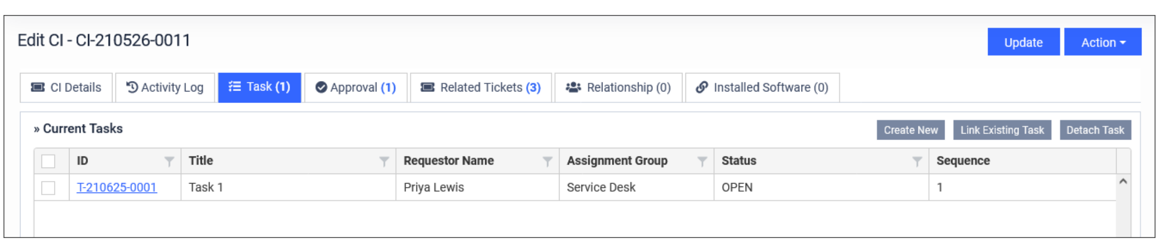
CI ACTIVITY LOG

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.

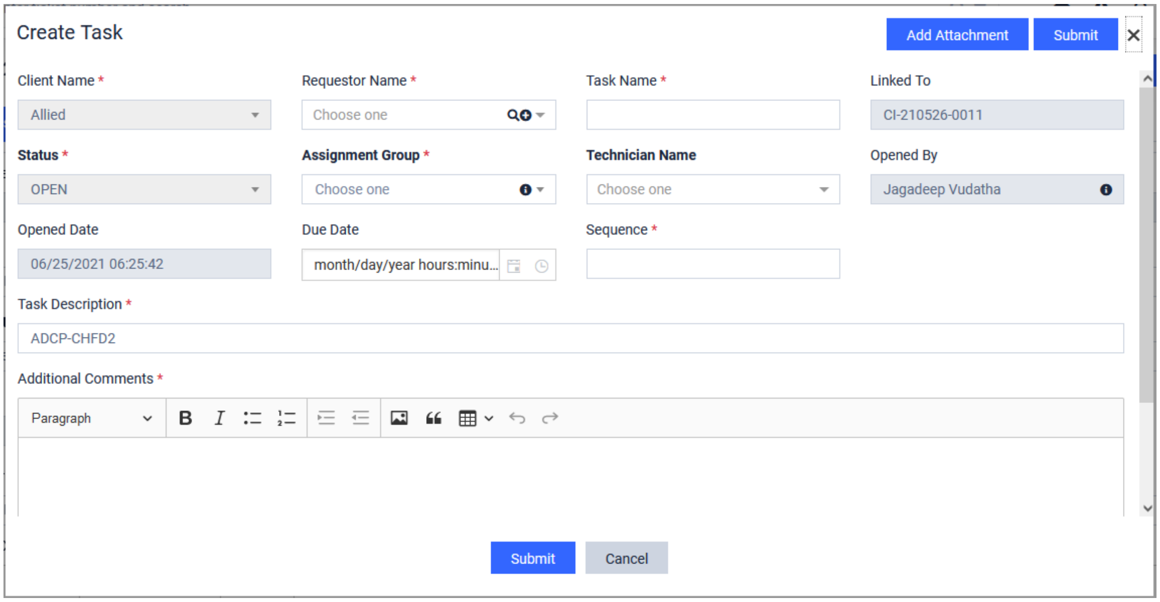


TASK

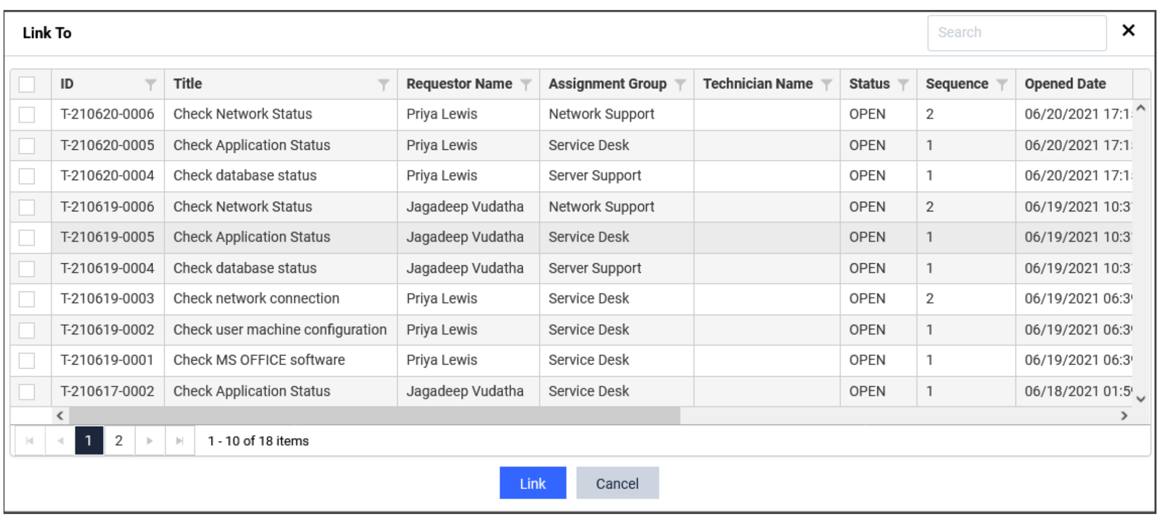
Agent can create a new Task and link to CI or open any existing tasks and can link to CI.



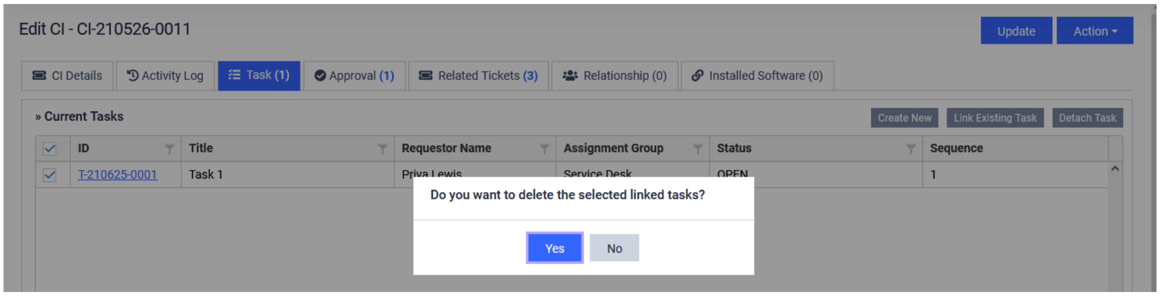
Create New- Click on **Task → Create New** to create a new Task.



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 CI by clicking on checkboxes.



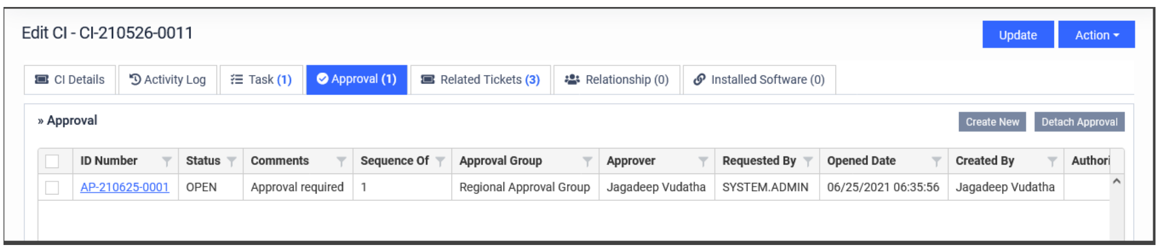
Detach Task- Select respective Task by clicking on checkbox and click on '**Detach Task**' to unlink it.

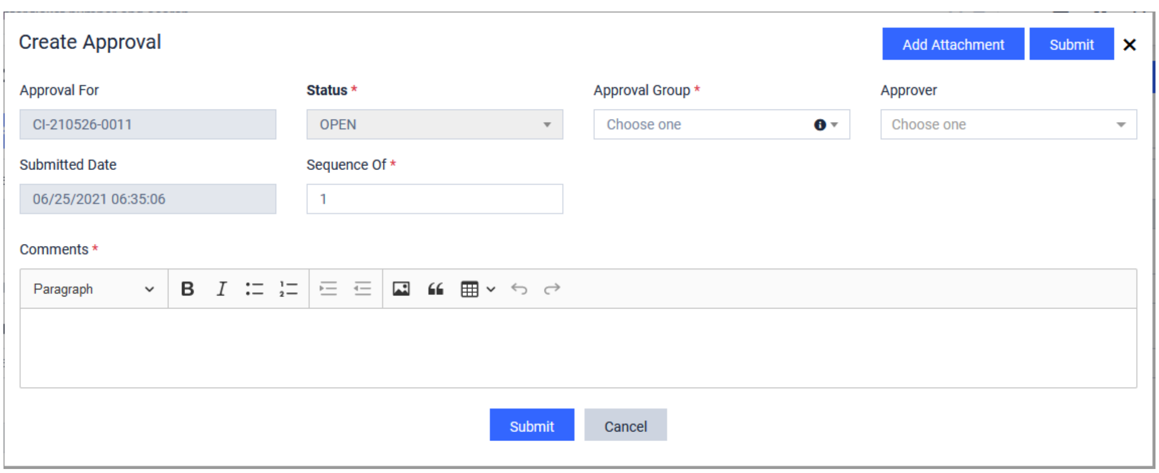


APPROVALS

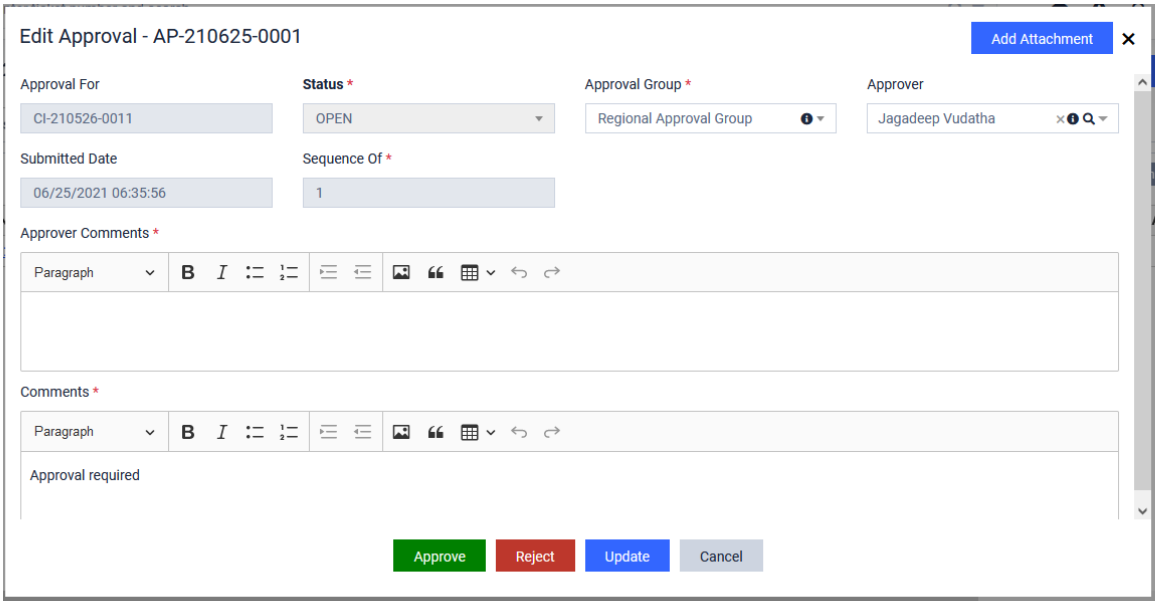
If a CI requires formal approval before proceeding, Agent can create an approval manually by clicking on **Approval→ Create New.**

Enter all * marked following mandatory fields.



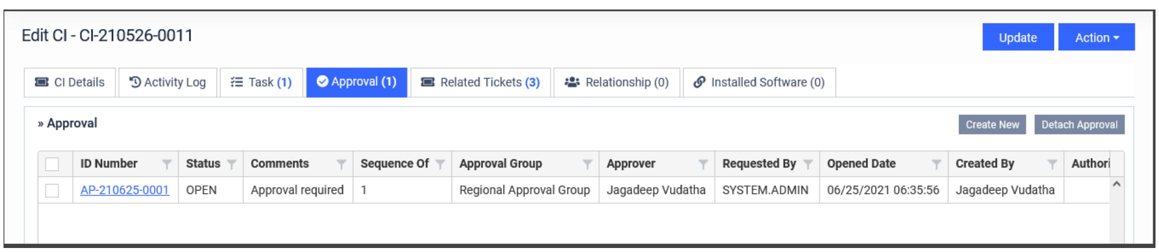


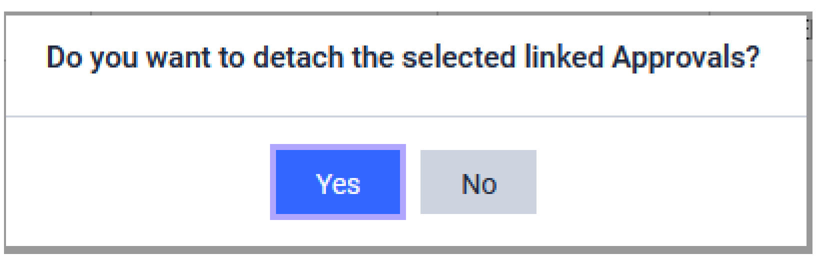
On submitting a request for approval, approver will receive an approval mail with a link to approve or reject the request.

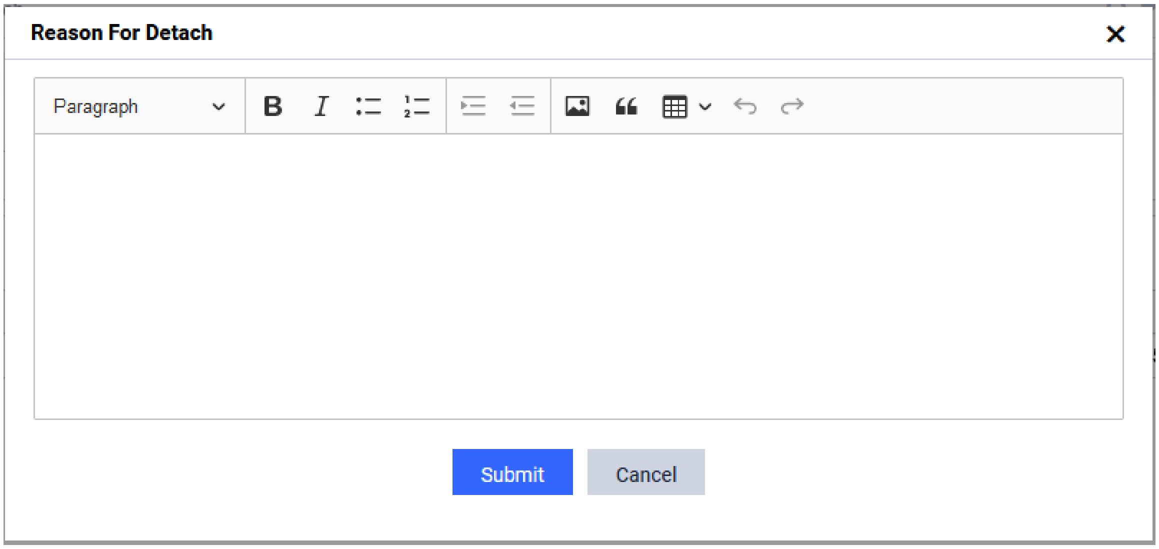


All linked approvals will visible under Approval Tab. If the logged in user is a managerial user, then he can open the approval and click on **Approve** or **Reject**.

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

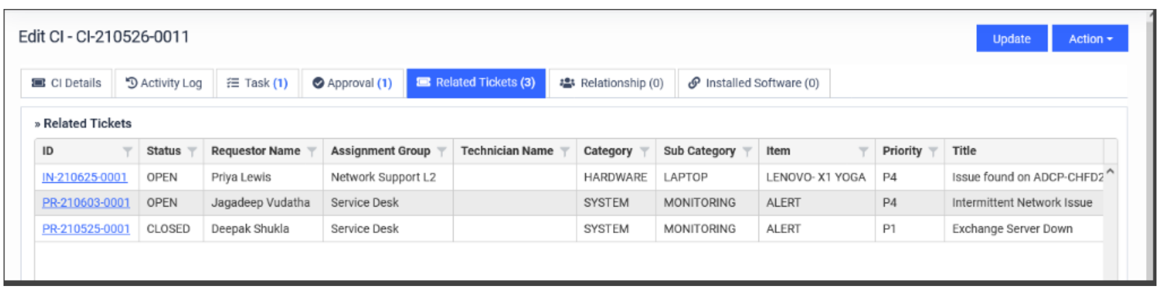






RELATED TICKETS

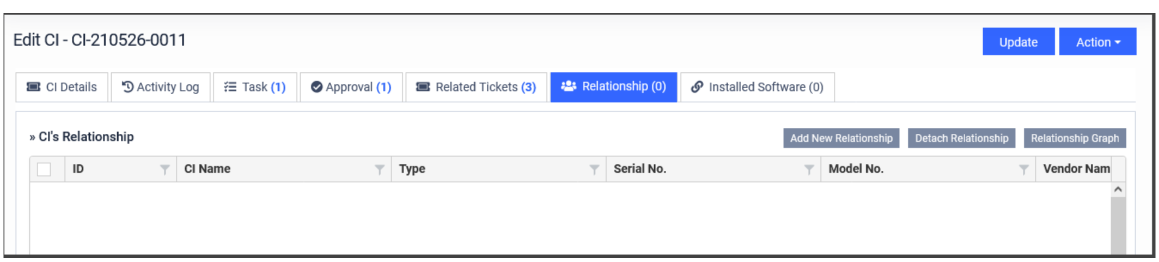
Displays list of all related tickets raised for CI.



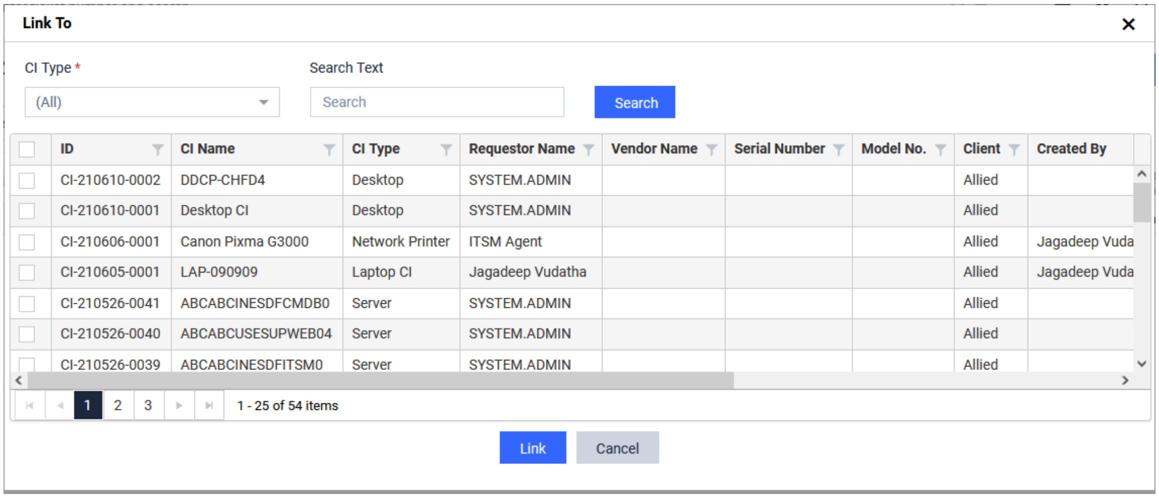
ID	Status	Requestor Name	Assignment Group	Technician Name	Category	Sub Category	Item	Priority	Title
IN-210625-0001	OPEN	Priya Lewis	Network Support L2		HARDWARE	LAPTOP	LENOVO- X1 YOGA	P4	Issue found on ADCP-CHFD2
PR-210603-0001	OPEN	Jagadeep Vudatha	Service Desk		SYSTEM	MONITORING	ALERT	P4	Intermittent Network Issue
PR-210525-0001	CLOSED	Deepak Shukla	Service Desk		SYSTEM	MONITORING	ALERT	P1	Exchange Server Down

RELATIONSHIP

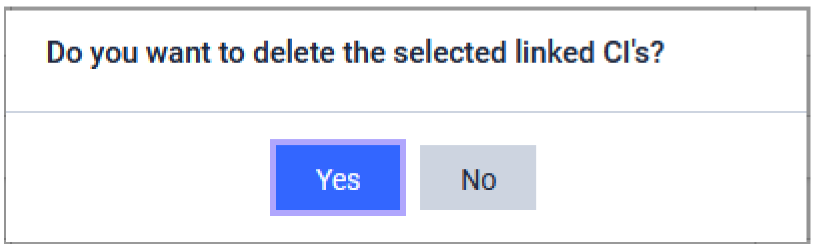
Tool facilitates to configure relationship between the CI.



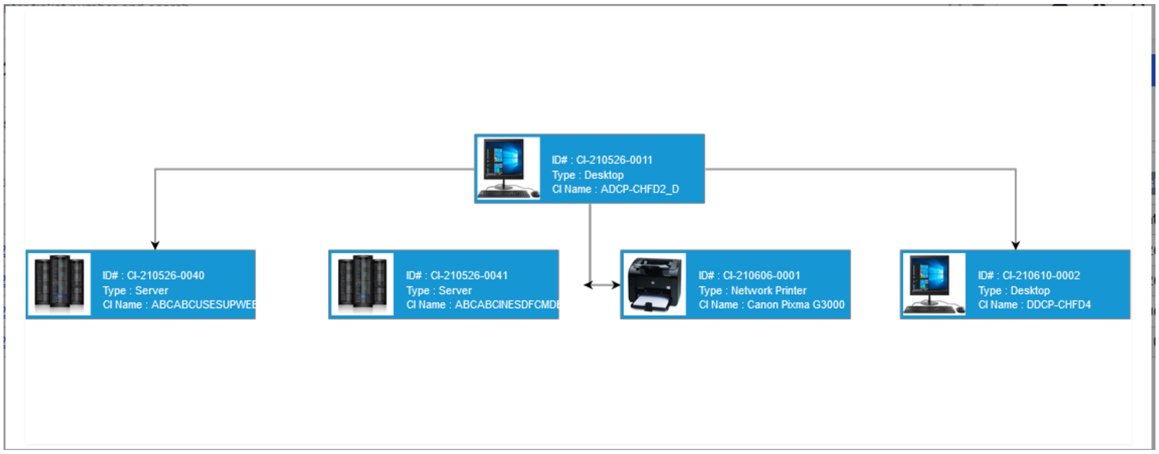
Add New Relationship – On clicking displays a list of CI. Select the CI required for configuring the relationship. Click on Link.

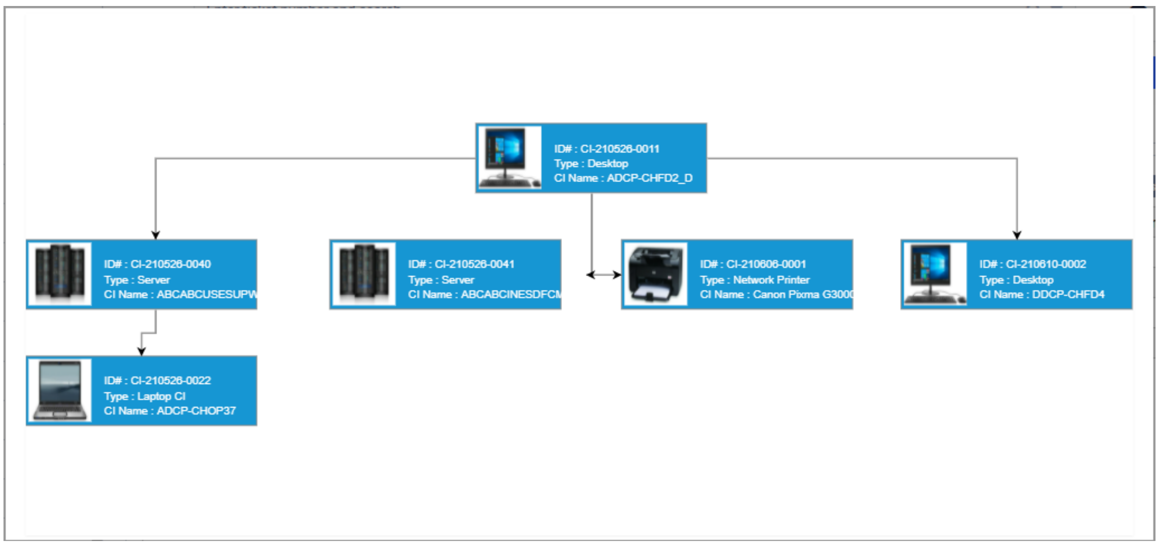


Detach Relationship – By clicking on checkbox, select CI that required to remove from relationship.



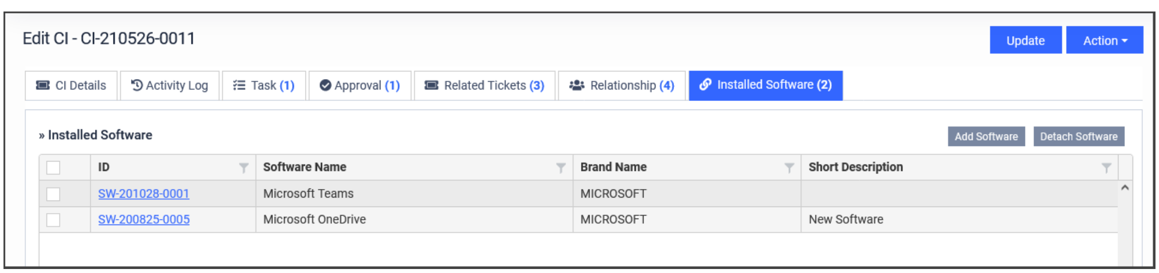
Relationship Graph – Displays graphical view of CI relationship. If any specific CI is linked to other CI then relationship will be displayed in next level.



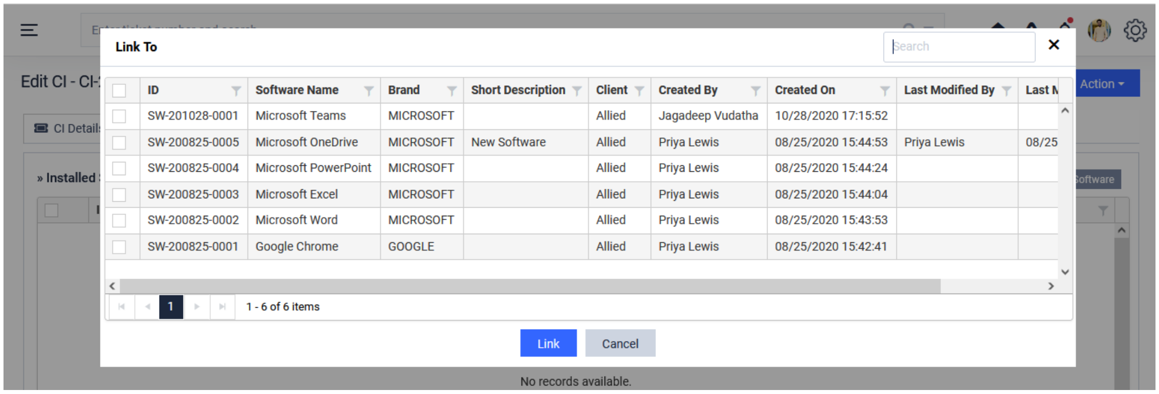


INSTALLED SOFTWARE

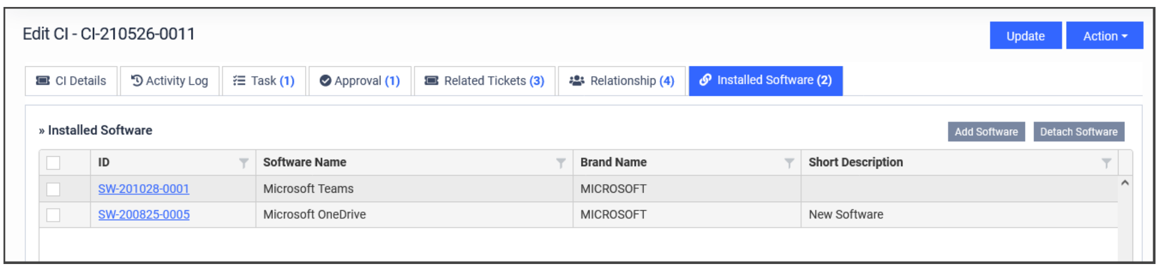
Tool facilitate to manage list of softwares installed on CI

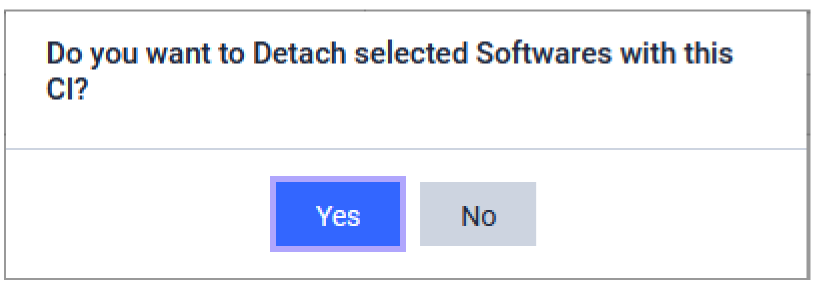


Add Software- On clicking displays a list of software. By clicking on checkbox select the list of softwares installed on the CI



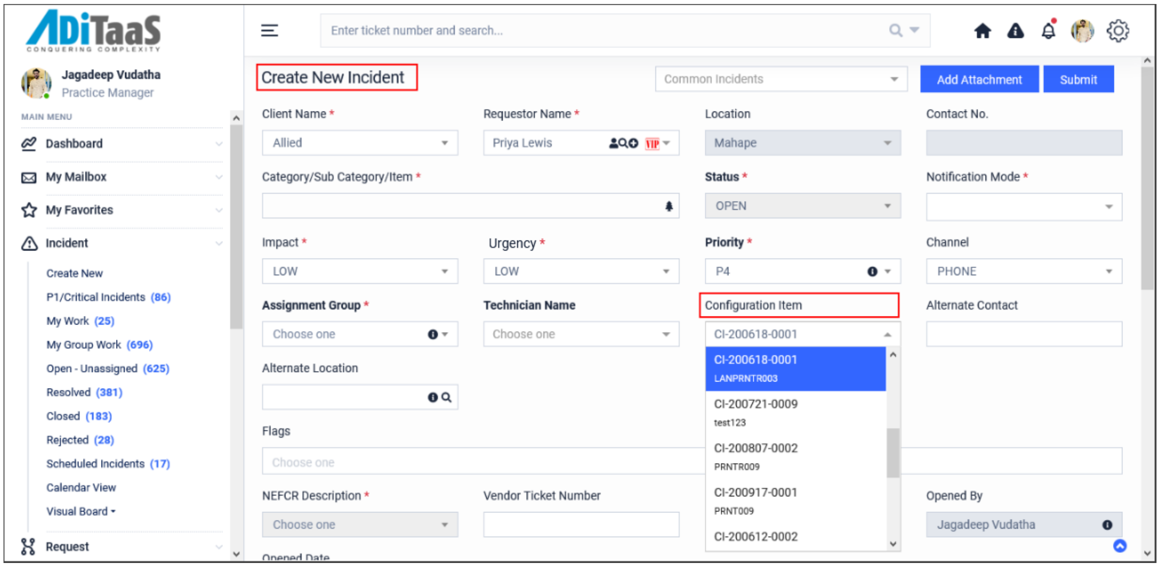
Detach Software- By clicking on checkbox, select the CI that required to be removed from installed software list.

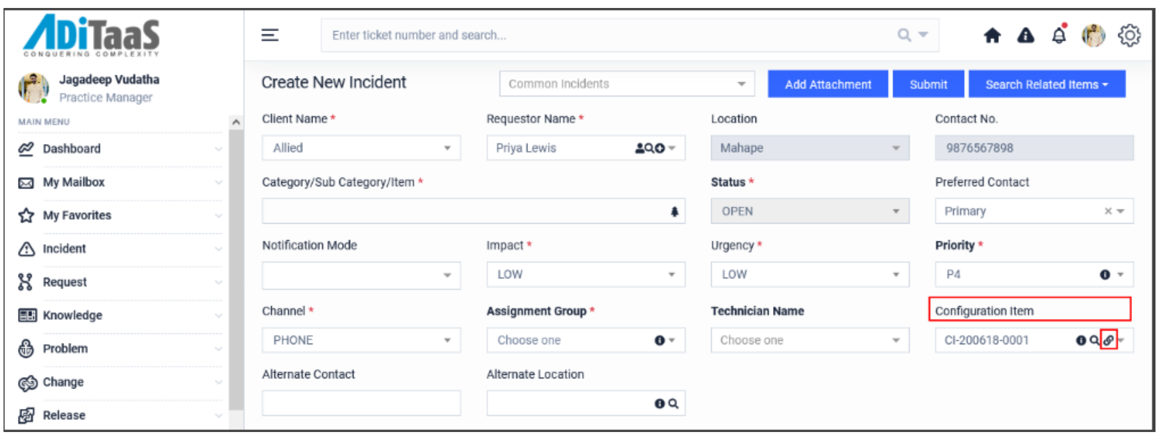


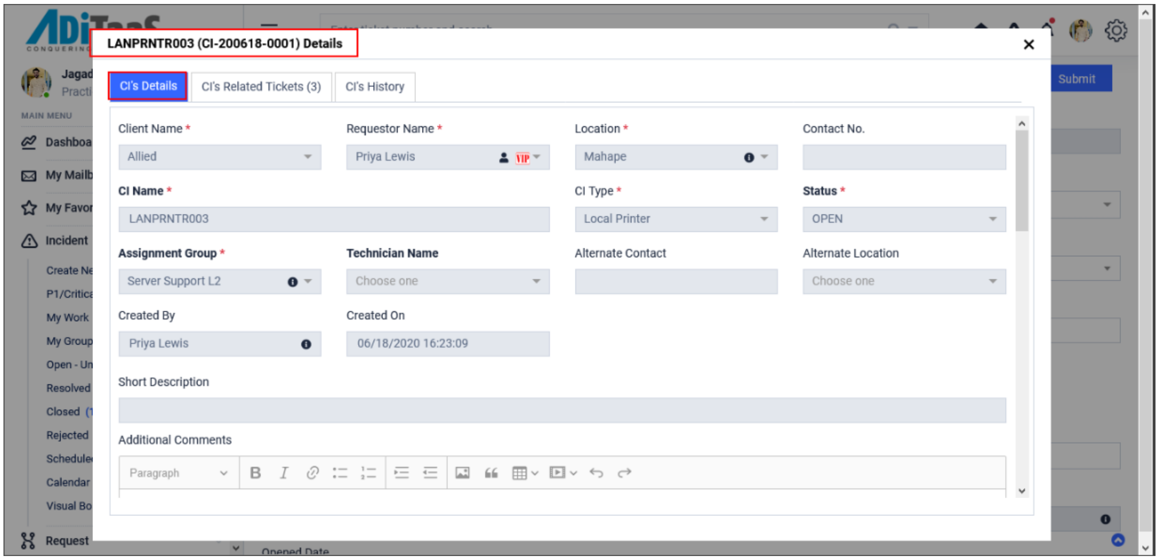


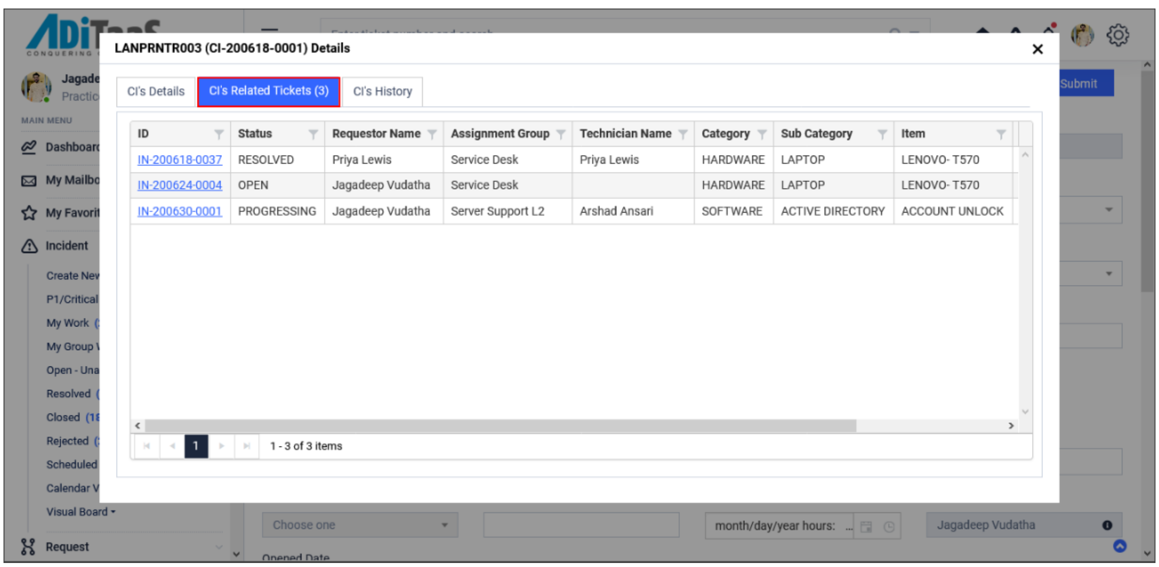
MANAGE CI IN CREATE/EDIT TICKET SCREEN

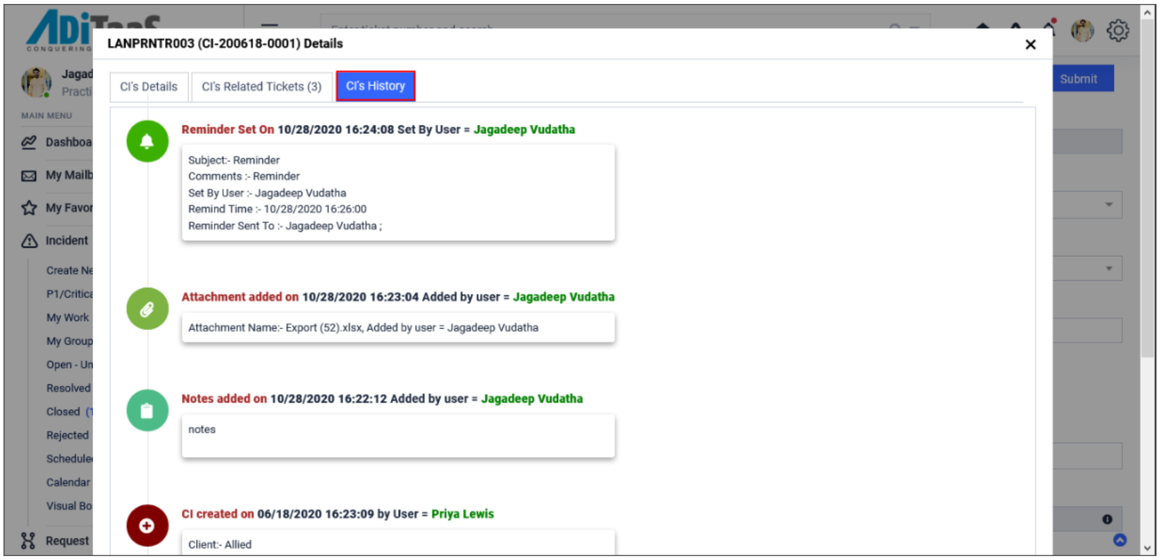
In new /edit ticket screen we have a configuration item as an individual field. There is an icon called impacted CI and clicking on that it will pop up a new window with CI details, ticket information and history of the CI. This information is coming from CMDB, but however CMDB can integrated with 3rd party configuration management system and real time it will do the update on CMDB and display the information on this particular screen.


ADiTaaS
Enter ticket number and search...
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
Create New Incident
Common Incidents
Add Attachment
Submit
Client Name *
Allied
Requestor Name *
Priya Lewis
Location
Mahape
Contact No.
Category/Sub Category/Item *
Status *
OPEN
Notification Mode *
Impact *
LOW
Urgency *
LOW
Priority *
P4
Channel
PHONE
Assignment Group *
Choose one
Technician Name
Choose one
Configuration Item
CI-200618-0001
Alternate Contact
CI-200618-0001
LANPRNTR003
CI-200721-0009
test123
CI-200807-0002
PRNTR009
CI-200917-0001
PRNT009
CI-200612-0002
Alternate Location
Flags
Choose one
NEFCR Description *
Choose one
Vendor Ticket Number
Opened By
Jagadeep Vudatha


ADiTaaS
Enter ticket number and search...
Jagadeep Vudatha
Practice Manager
MAIN MENU
Dashboard
My Mailbox
My Favorites
Incident
Request
Knowledge
Problem
Change
Release
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
CI-200618-0001
Alternate Contact
Alternate Location


LANPRNTR003 (CI-200618-0001) Details
CI's Details
CI's Related Tickets (3)
CI's History
Client Name *
Allied
Requestor Name *
Priya Lewis
Location *
Mahape
Contact No.
CI Name *
LANPRNTR003
CI Type *
Local Printer
Status *
OPEN
Assignment Group *
Server Support L2
Technician Name
Choose one
Alternate Contact
Alternate Location
Choose one
Created By
Priya Lewis
Created On
06/18/2020 16:23:09
Short Description
Additional Comments
Paragraph
Submit

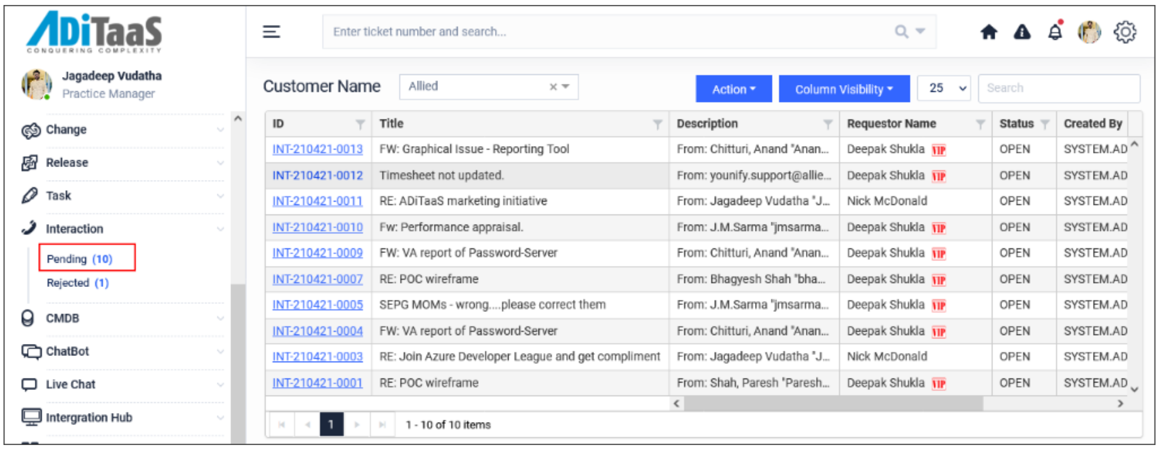

LANPRNTR003 (CI-200618-0001) Details
CI's Details
CI's Related Tickets (3)
CI's History
ID | Status | Requestor Name | Assignment Group | Technician Name | Category | Sub Category | Item
IN-200618-0037 | RESOLVED | Priya Lewis | Service Desk | Priya Lewis | HARDWARE | LAPTOP | LENOVO- T570
IN-200624-0004 | OPEN | Jagadeep Vudatha | Service Desk | | HARDWARE | LAPTOP | LENOVO- T570
IN-200630-0001 | PROGRESSING | Jagadeep Vudatha | Server Support L2 | Arshad Ansari | SOFTWARE | ACTIVE DIRECTORY | ACCOUNT UNLOCK
1 - 3 of 3 items
Submit


LANPRNTR003 (CI-200618-0001) Details
CI's Details
CI's Related Tickets (3)
CI's History
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
Submit
MAIN MENU
Incident
My Work
Rejected
Calendar
Request

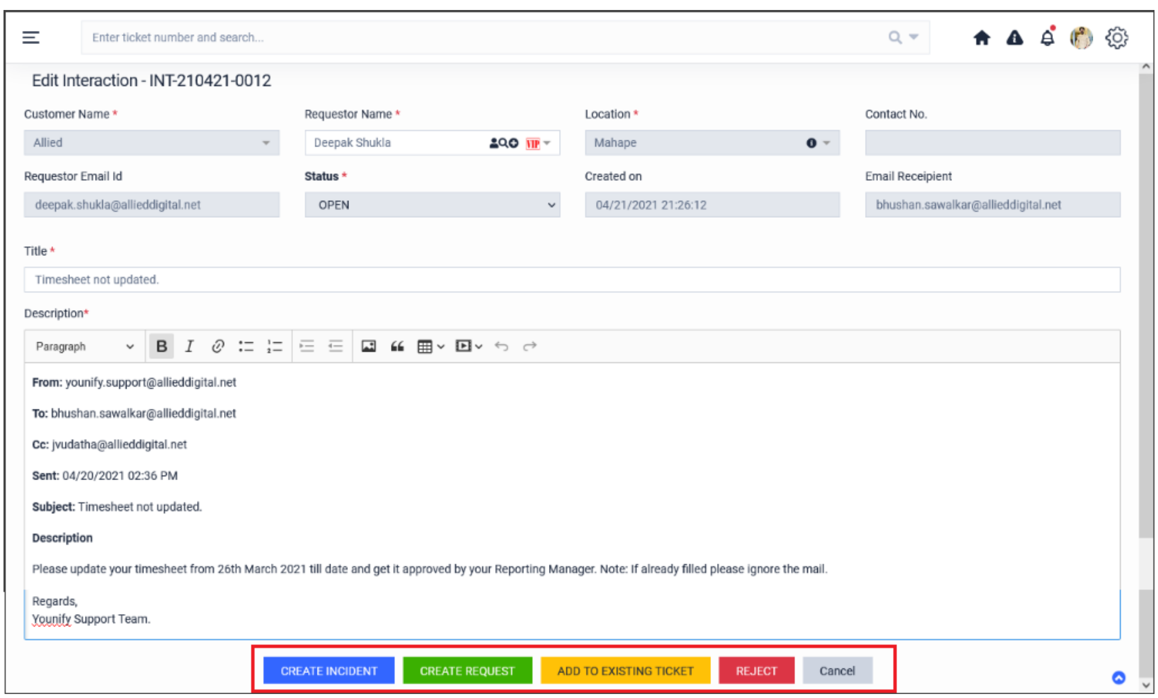
Interaction Module

When email manager is configured with the interaction module, any email received will be created as interaction ticket. Later Agent has provision to create or update the ticket from interaction.

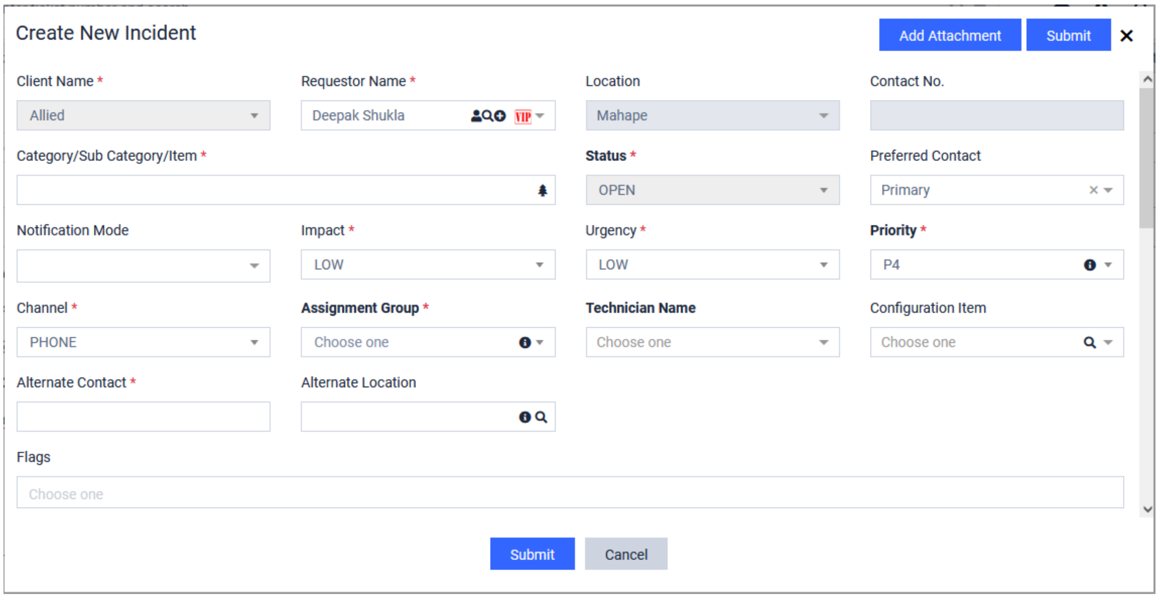
1. All interactions ticket will be visible under **Interaction** module → **Pending**



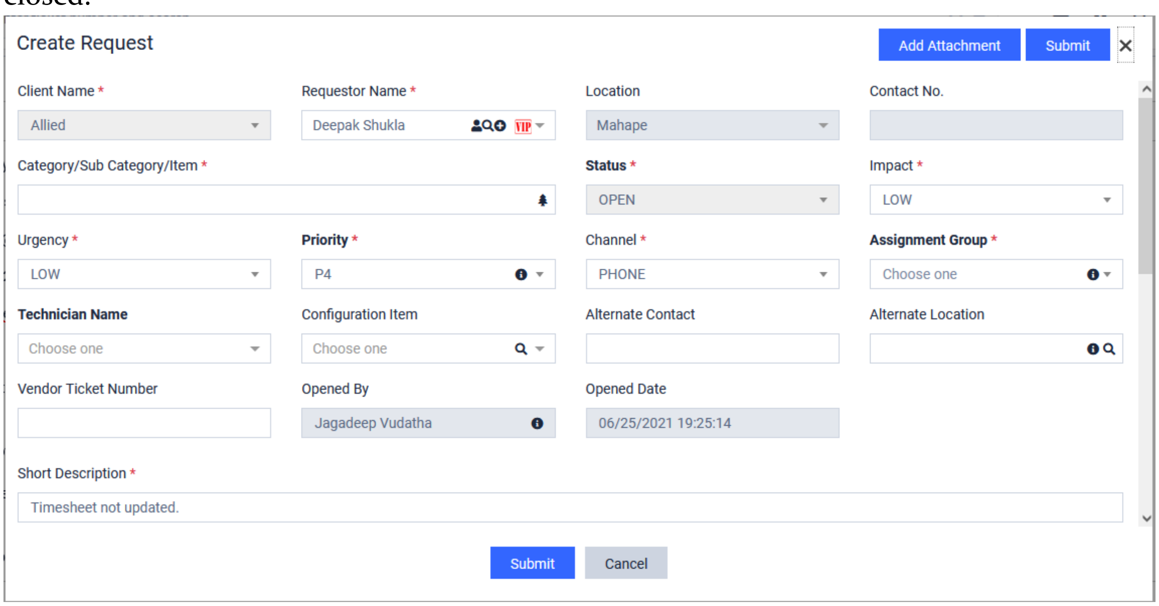
2. Agent can review the ticket and take the appropriate action required
3. There are 4 actions available on interaction tickets



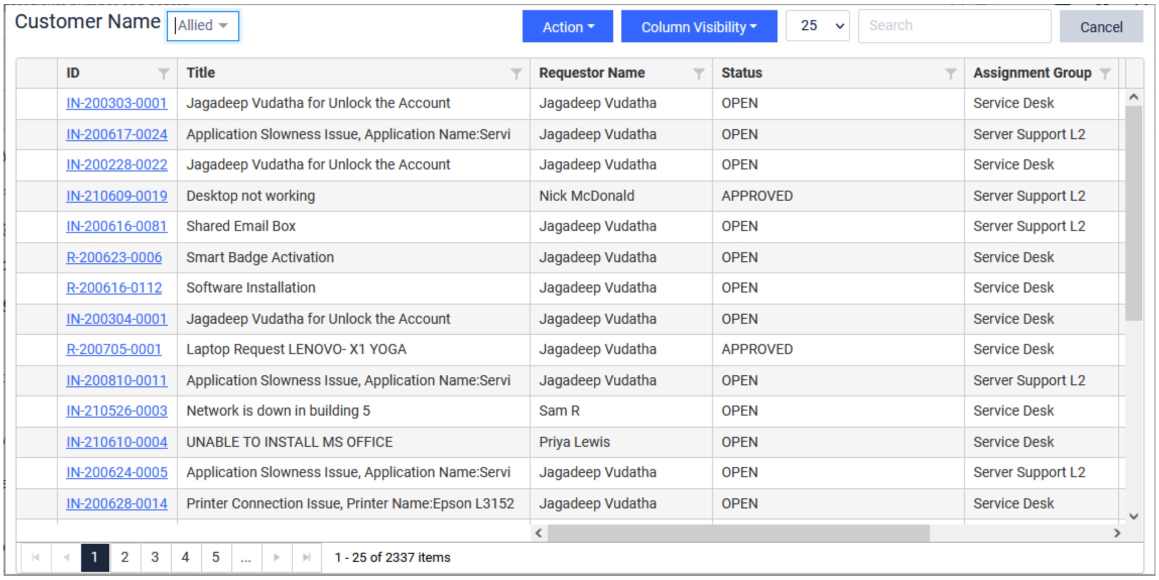
Create Incident- On clicking new incident new incident ticket gets created and interaction ticket will be added as interaction in incident ticket. Interaction status will be marked as closed.



Create 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.

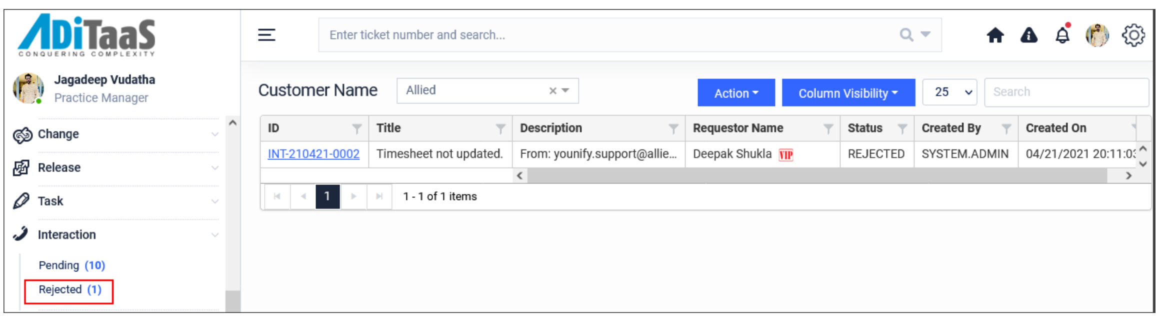


Add to Existing Ticket- If there is a ticket available, then agent has provision to update the interaction with ticket id. Interaction will be added as notes in ticket. Interaction status will be marked as closed.



ID	Title	Requestor Name	Status	Assignment Group
IN-200303-0001	Jagadeep Vudatha for Unlock the Account	Jagadeep Vudatha	OPEN	Service Desk
IN-200617-0024	Application Slowness Issue, Application Name:Servi	Jagadeep Vudatha	OPEN	Server Support L2
IN-200228-0022	Jagadeep Vudatha for Unlock the Account	Jagadeep Vudatha	OPEN	Service Desk
IN-210609-0019	Desktop not working	Nick McDonald	APPROVED	Server Support L2
IN-200616-0081	Shared Email Box	Jagadeep Vudatha	OPEN	Server Support L2
R-200623-0006	Smart Badge Activation	Jagadeep Vudatha	OPEN	Service Desk
R-200616-0112	Software Installation	Jagadeep Vudatha	OPEN	Service Desk
IN-200304-0001	Jagadeep Vudatha for Unlock the Account	Jagadeep Vudatha	OPEN	Service Desk
R-200705-0001	Laptop Request LENOVO- X1 YOGA	Jagadeep Vudatha	APPROVED	Service Desk
IN-200810-0011	Application Slowness Issue, Application Name:Servi	Jagadeep Vudatha	OPEN	Server Support L2
IN-210526-0003	Network is down in building 5	Sam R	OPEN	Service Desk
IN-210610-0004	UNABLE TO INSTALL MS OFFICE	Priya Lewis	OPEN	Service Desk
IN-200624-0005	Application Slowness Issue, Application Name:Servi	Jagadeep Vudatha	OPEN	Server Support L2
IN-200628-0014	Printer Connection Issue, Printer Name:Epson L3152	Jagadeep Vudatha	OPEN	Service Desk

Reject- If there is no any action required, interaction can be marked as **Rejected**. All Rejected interactions will be visible under Rejected data grid.



ID	Title	Description	Requestor Name	Status	Created By	Created On
INT-210421-0002	Timesheet not updated.	From: younify.support@allie...	Deepak Shukla VIP	REJECTED	SYSTEM.ADMIN	04/21/2021 20:11:0

Reports

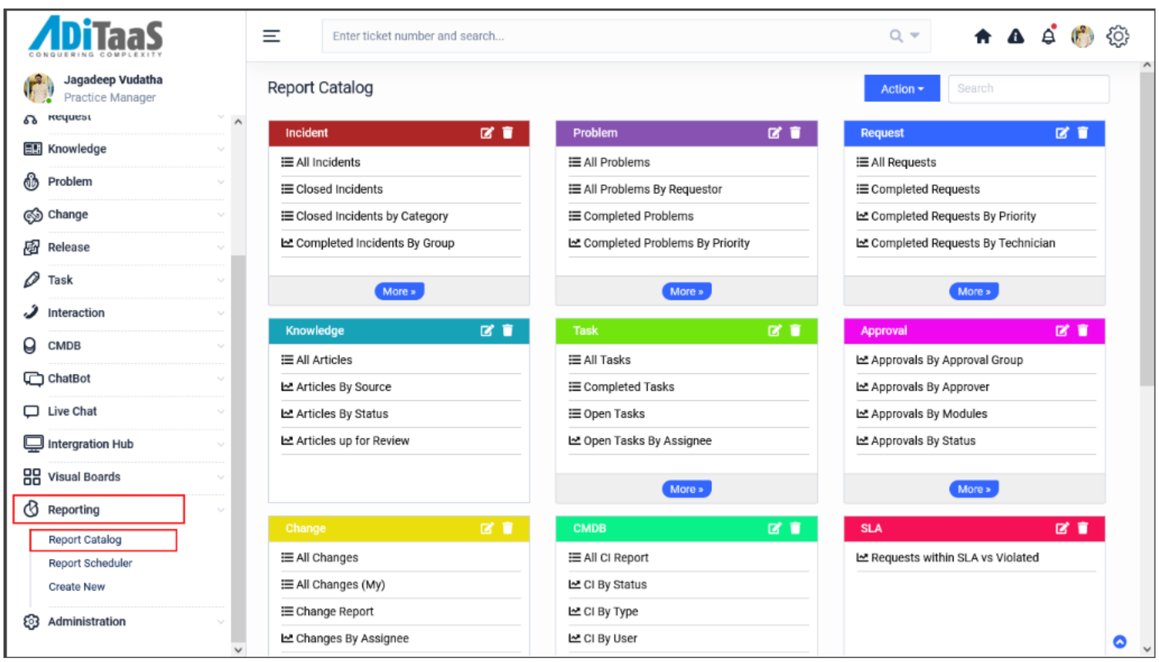
ADiTaaS provides facility to create numerous reports. Along with creation of new reports users can access and download ready available reports from Report Catalog. User can create brand new report by clicking on **Create New** option.

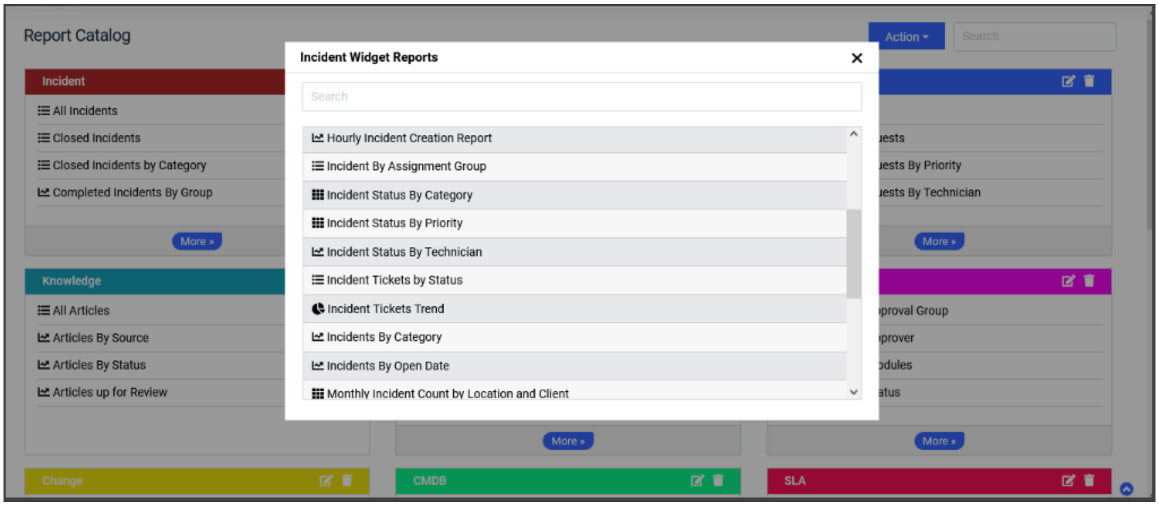
REPORT CATALOG

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.

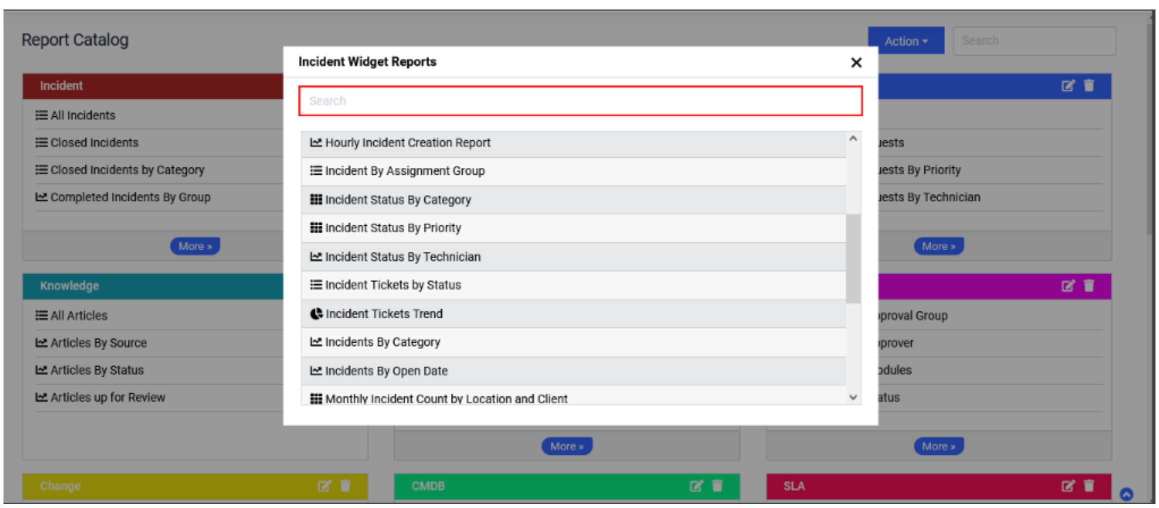
To view the various reports available in application

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.



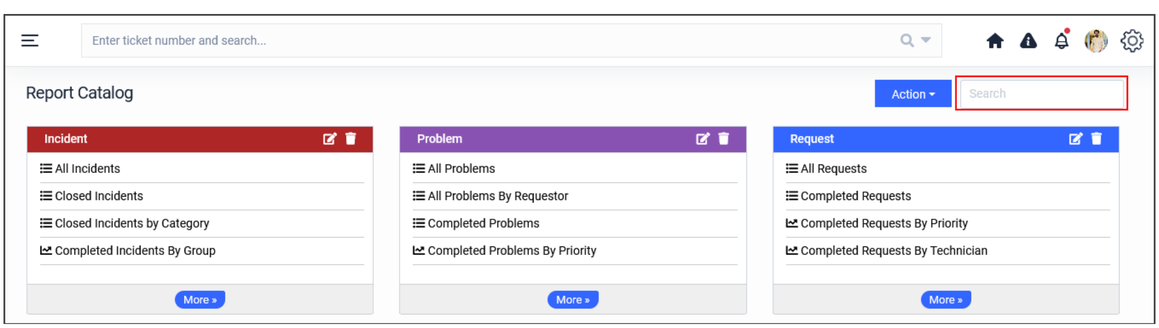


Wild card search on pop up window will facilitate to search reports by entering the keywords.

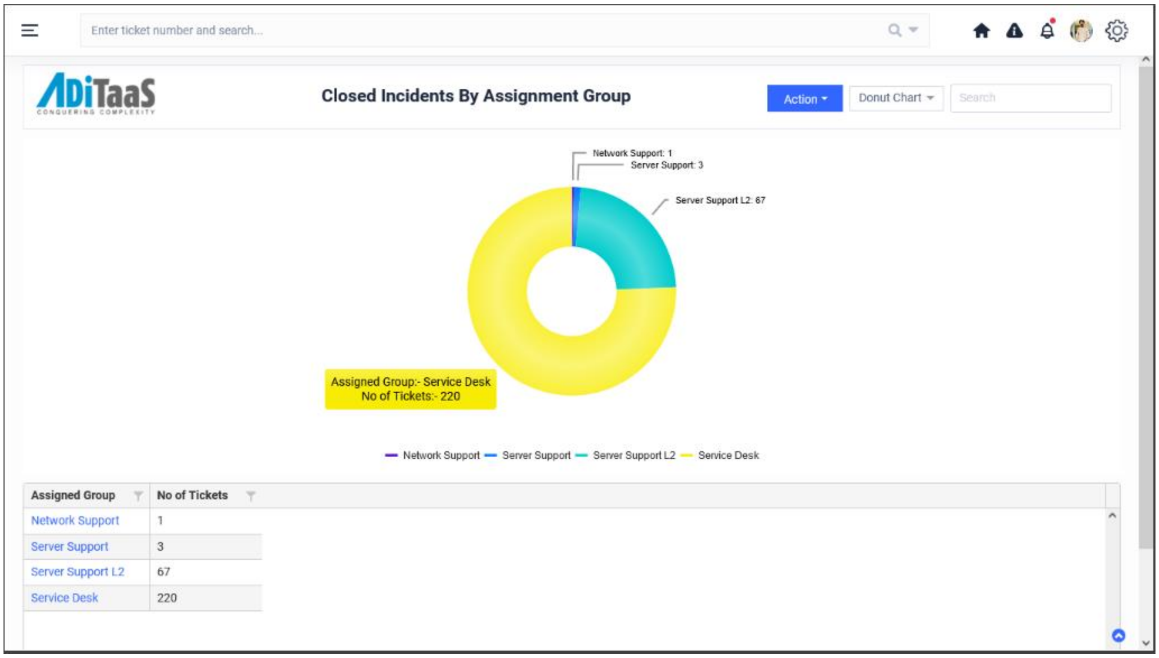


REPORT CATALOG- SEARCH

Search enables to quick search for any reports available in Report Catalog.



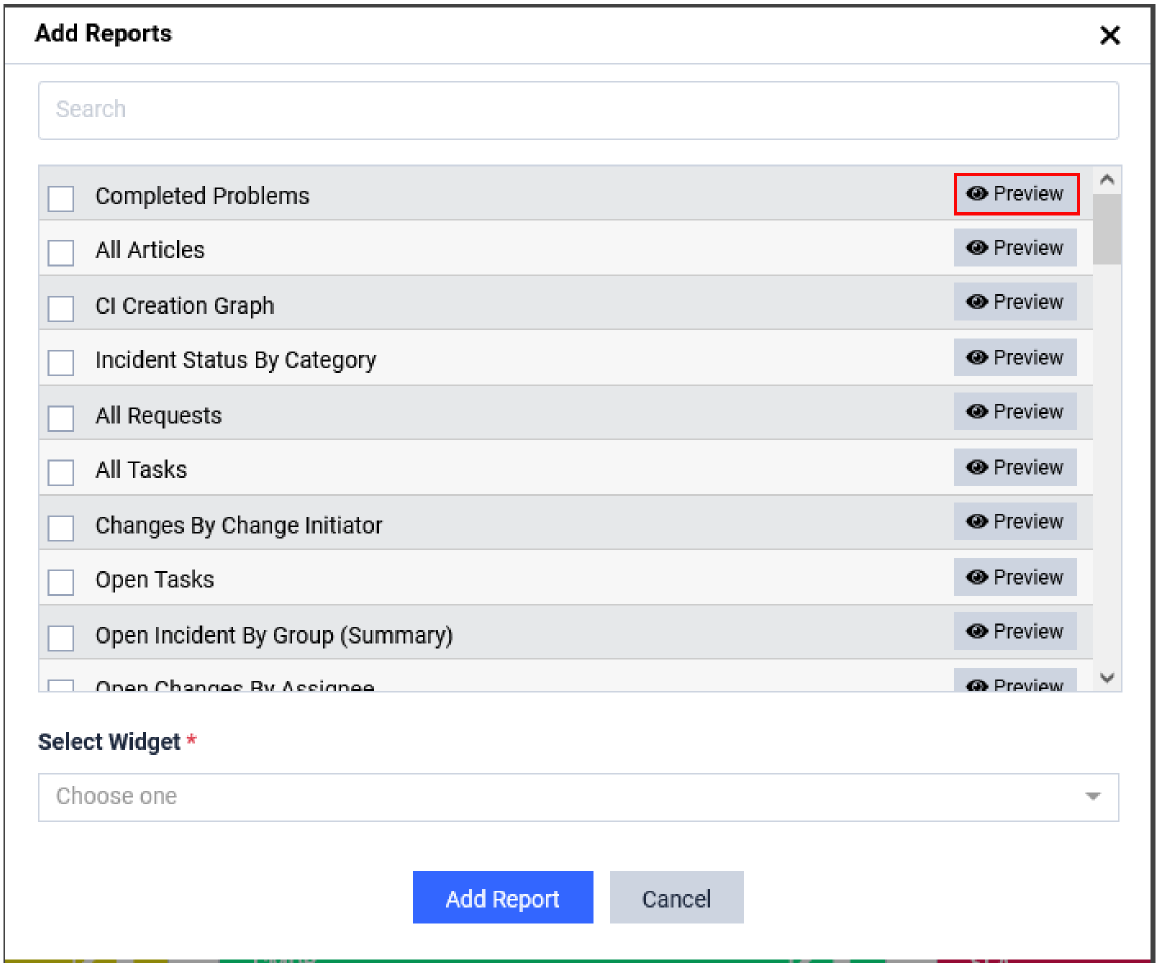
Click on required report to from Report catalog to view.



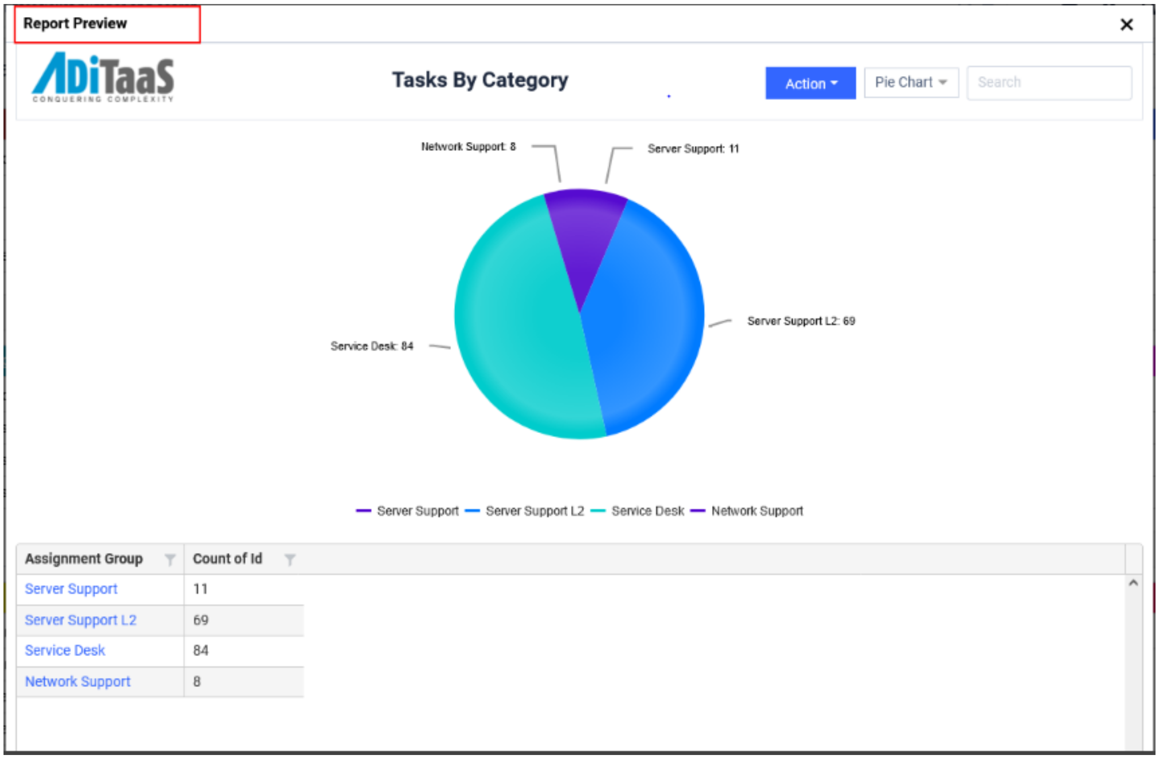
REPORT CATALOG – ACTION MENU

Add Report

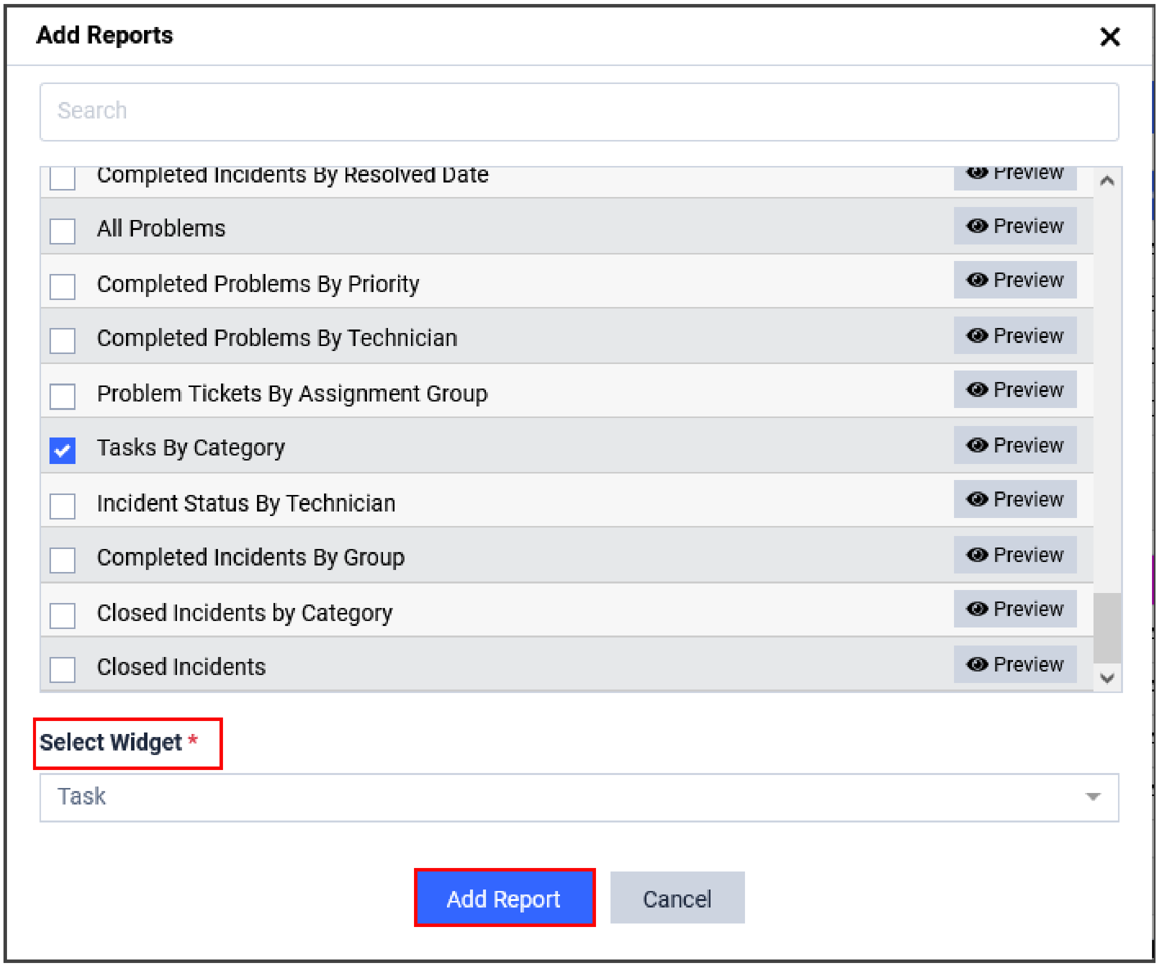
1. On clicking **Add Report** from **Action** menu will display list of ready available reports with preview option. Select required report by clicking on checkbox and click on **Preview**.



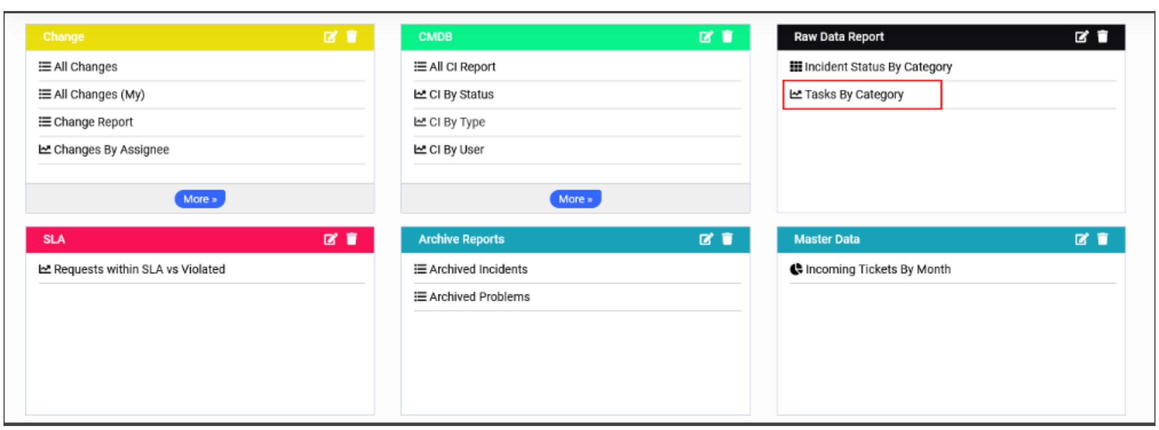
2. On Report Preview, tool allows to change the graph type and view the report on real time.



3. 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.



4. On submitting, new added report will be visible under selected report widget.

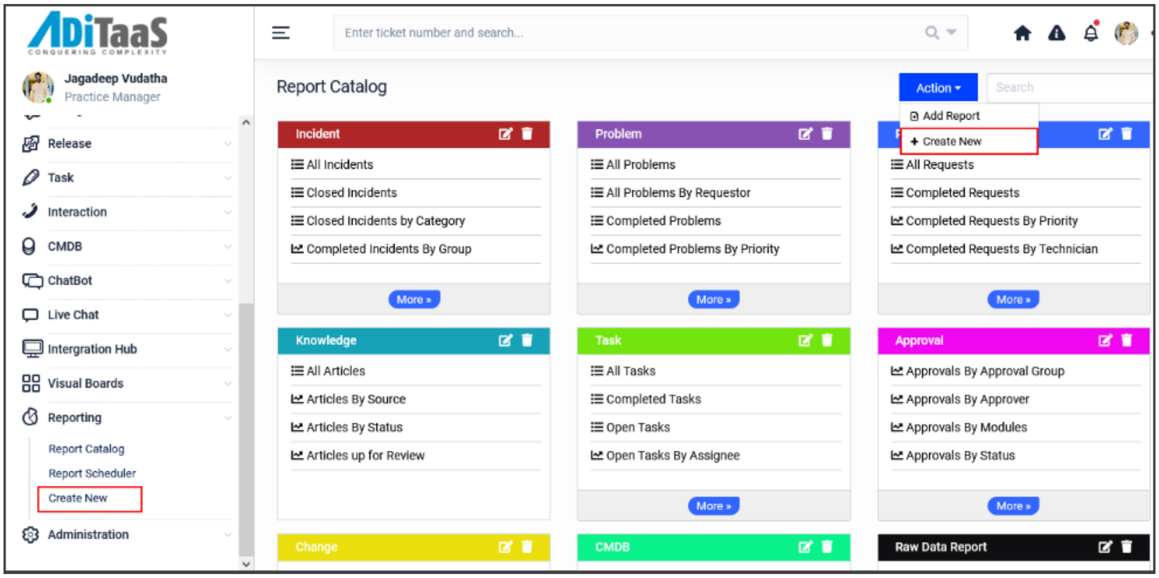


CREATE NEW

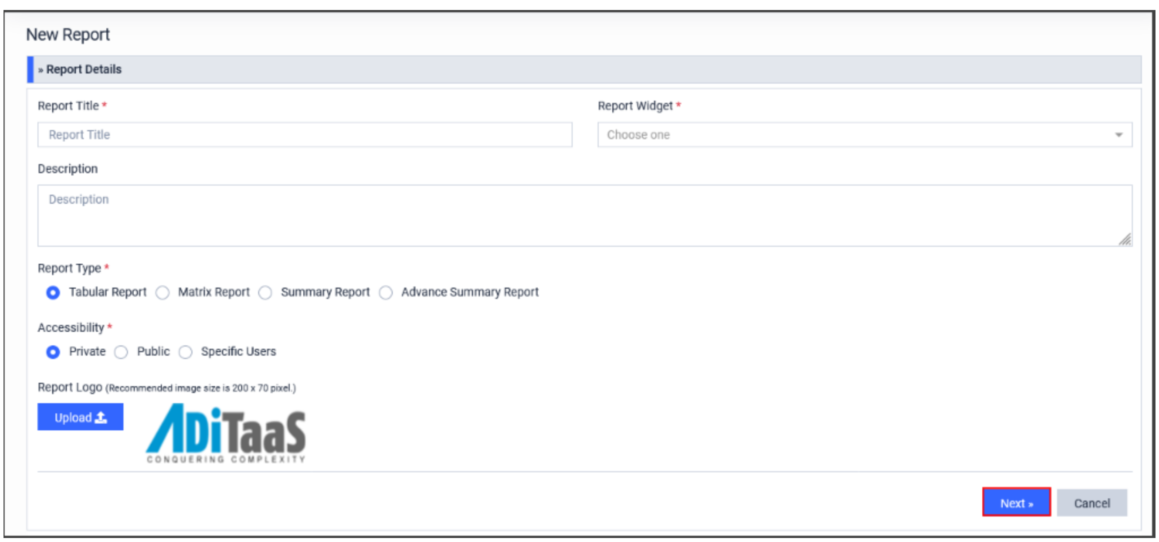
Tool enables you to create reports that meet your need if you are unable to find them from the list of out-of-the-box reports already available.

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.



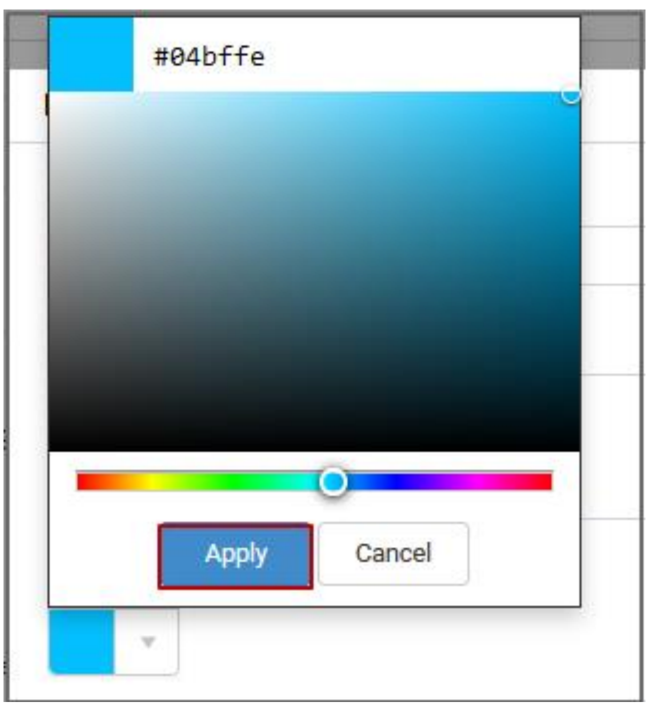
4. Select the required report widget from the drop down list where you would like to see the configured report.

Create New Report Widget

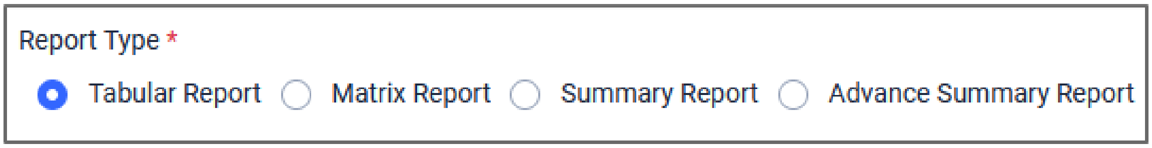
Tool enables you to create new report widget that meet your need if you are unable to find them from the list of report widgets already available.

a. Click on **Report Widget** drop down list
b. Click on **New** Option

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.



5. Choose the **Report Type** by selecting the radio buttons. You can create **Tabular Reports**, **Matrix Reports**, **Summary Reports**, and **Advance Summary Reports.**

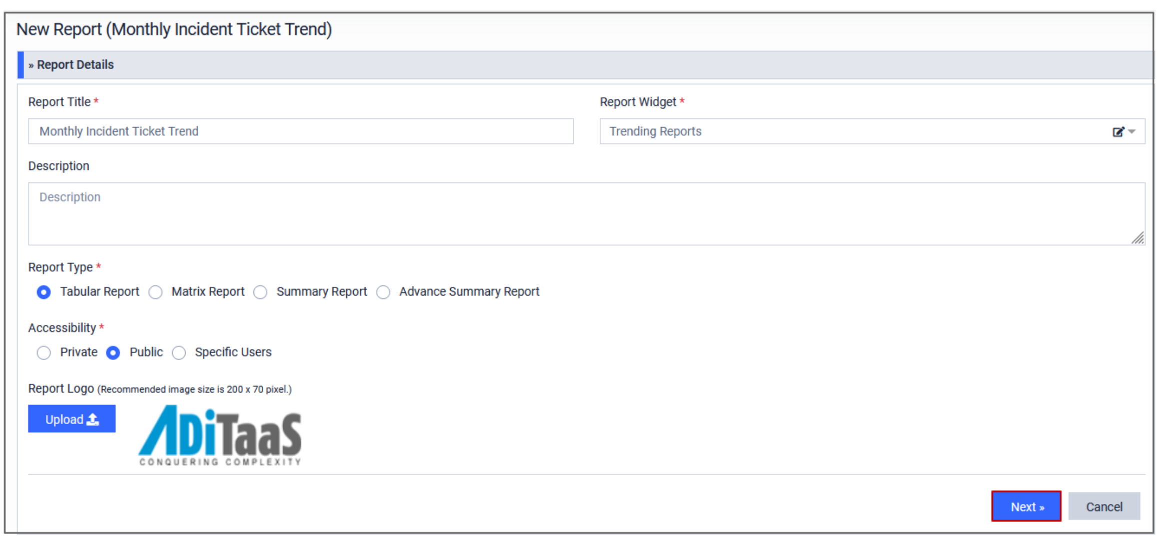


6. Choose the **Accessibility** selecting the radio buttons. You can create **Private, Public** and **Specific Users.**

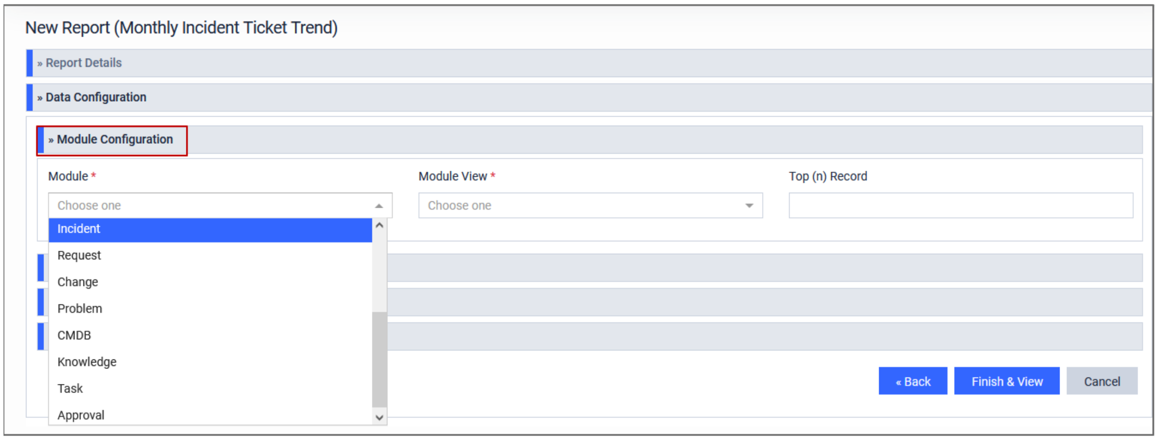
- **Private**- Report will be visible only to the user who has created the report
- **Public**- Report will be visible to all
- **Specific Users** - Report will be visible only to the specified users

7. By clicking on **Report Logo**, tool allows to upload a new logo for report. By default organization logo will appear on reports.

8. Click Proceed to **Next** >> button. This opens the **Data Configuration Page**.



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.

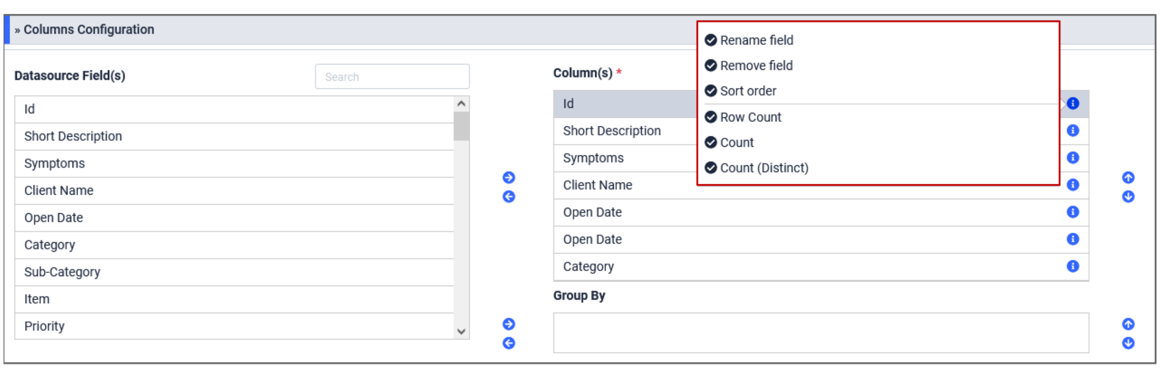
To generate Tabular Reports

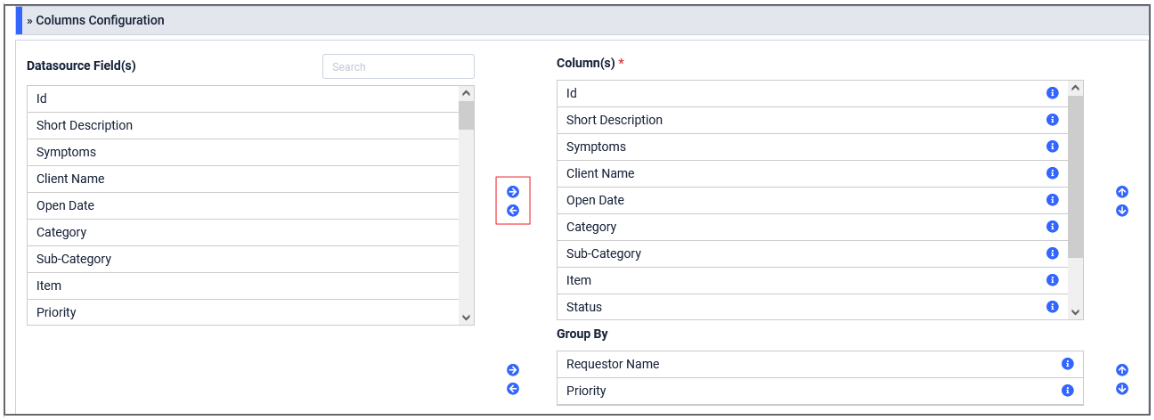
Tabular reports are simple reports that allow you to list your data based on certain criteria. We have selected the Tabular Reports option under Report Type.

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.

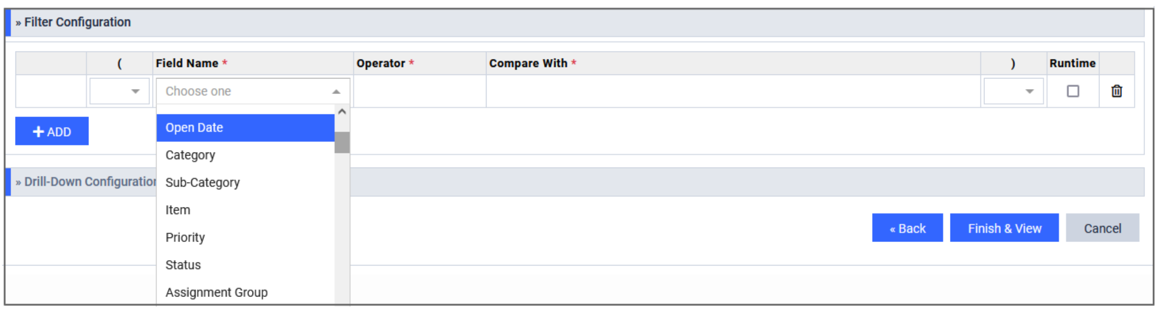
b. **Group By** allows to grouping of columns, where you can choose two levels of grouping.

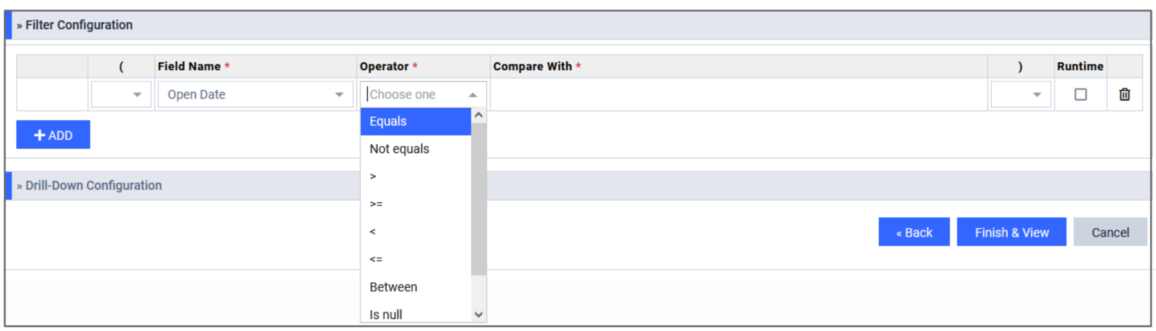
c. There are action available at column field level to **Rename**, **Remove**, **Sort** and get a **Row count** or **distinct count**.

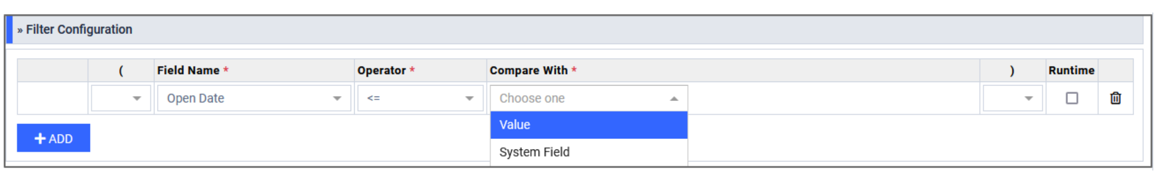


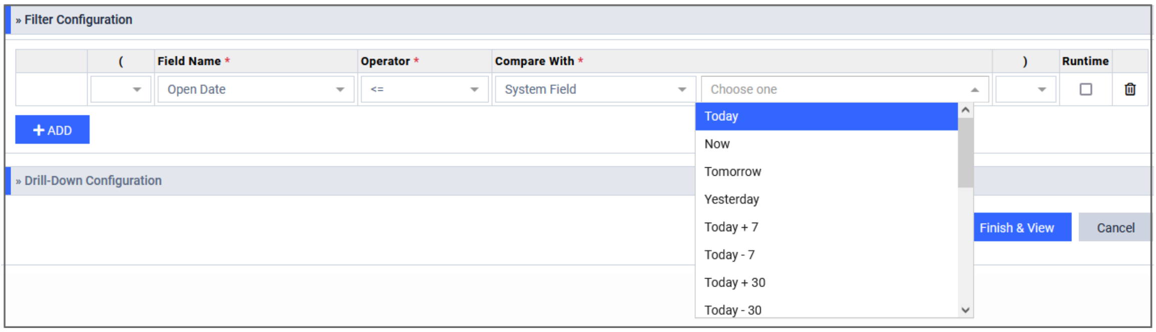


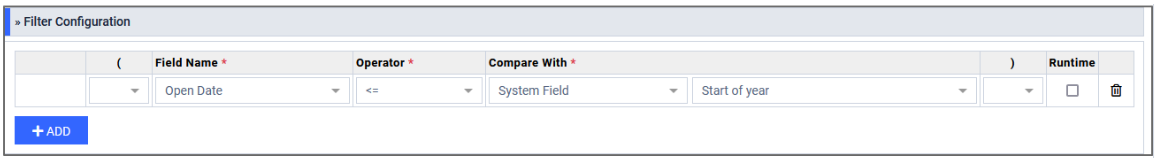
11. Next move to **Filter Configuration,** click on **Add** to add condition. If you are using the date/time filter criteria, select the date column name from the field name drop down list.



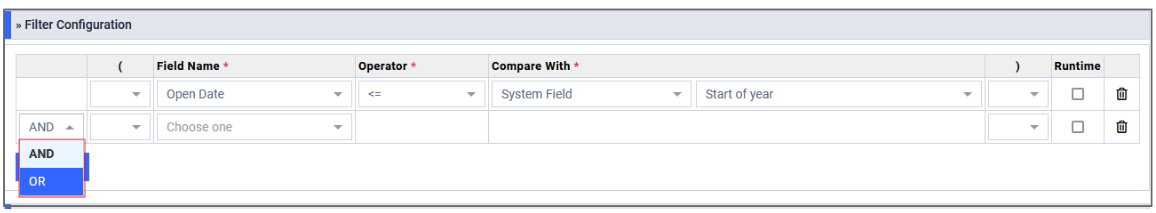




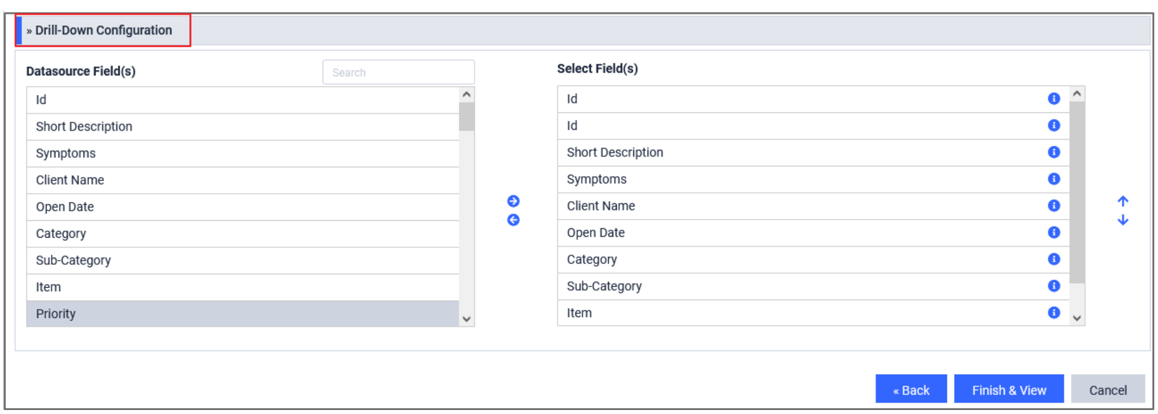




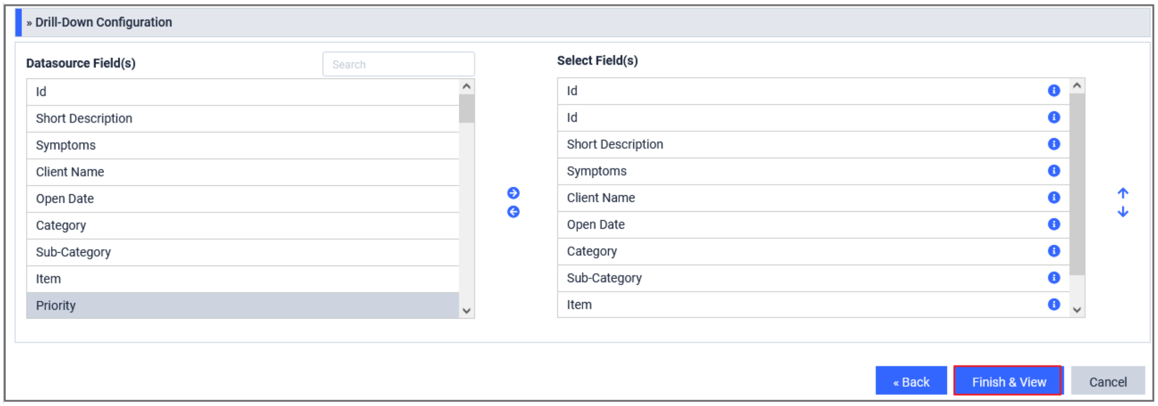
AND or OR option allows to add more than one criteria. You can delete a criteria by clicking the delete icon.

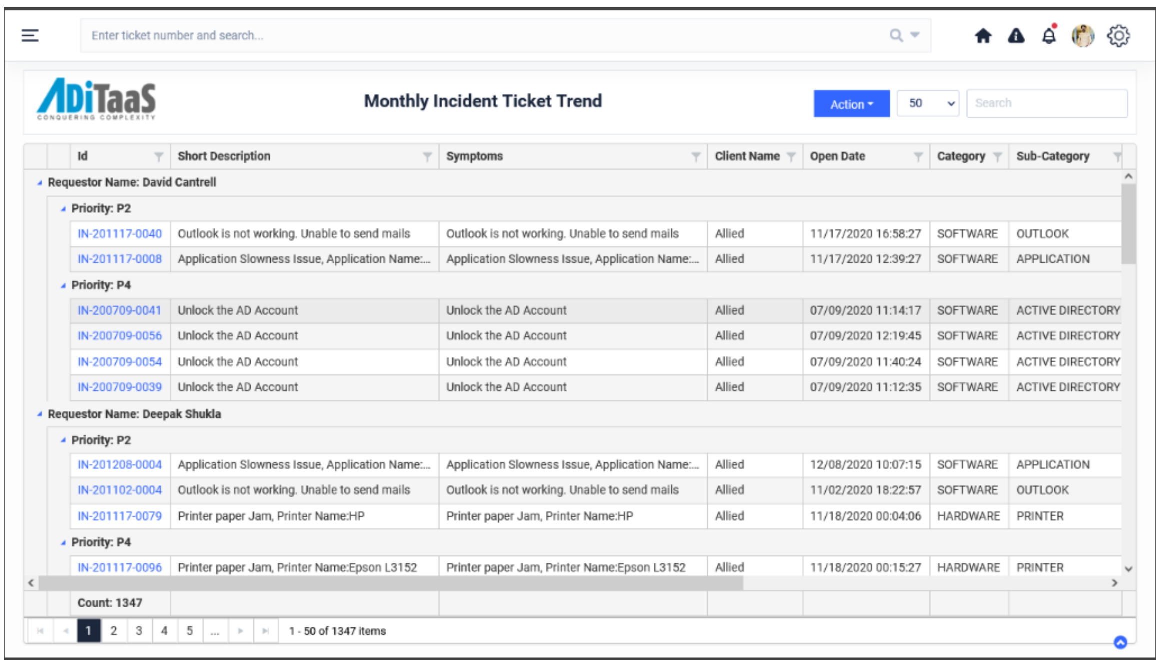


12. Drill down Configuration allows user to have drill down report with required fields. Select the columns from the Data source field list box and click button to move them to Columns list box. Click the button if you want to remove any column from the Columns list box.



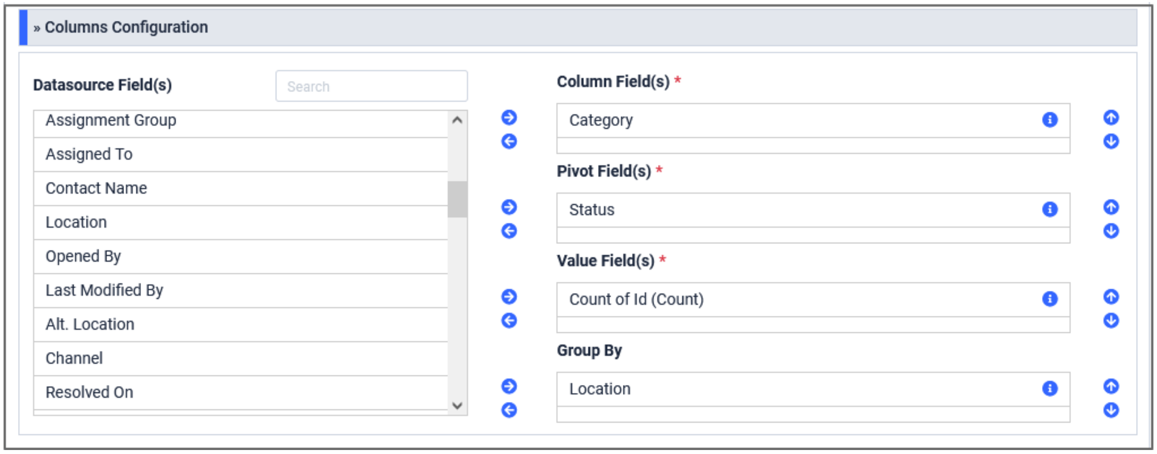
13. Finally click on **Finish & View** to view the report.

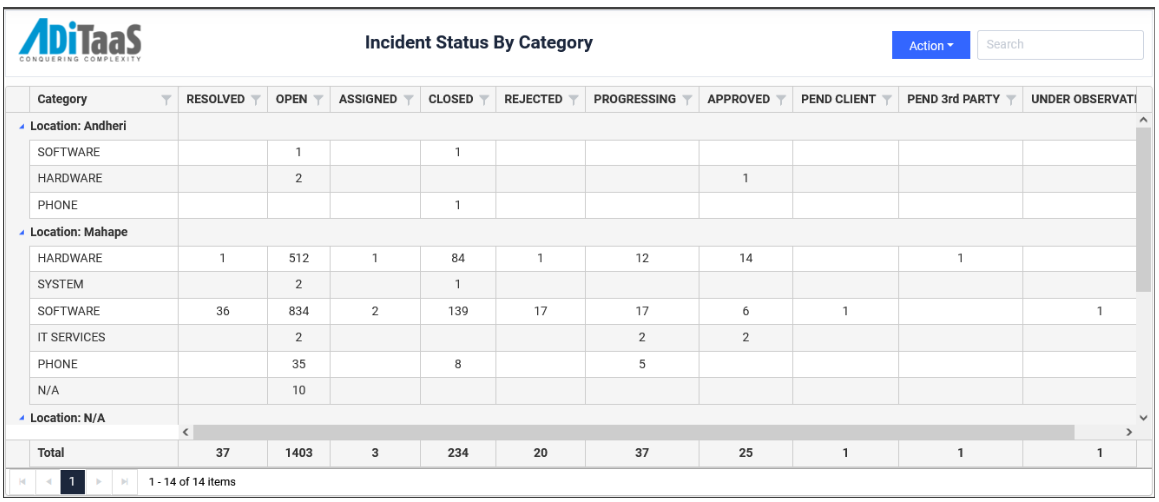




To generate a matrix report

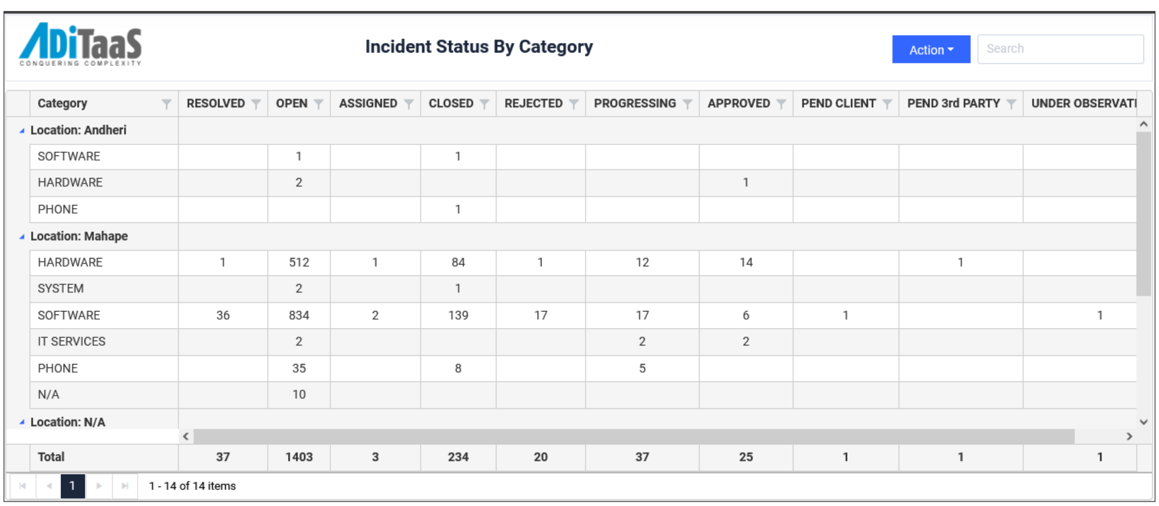
- Matrix reports provide the data in a grid manner (m x n format). Select **Report type as** Matrix Reports and depend on selected report type column configuration will be changed.
- Select the columns from the Data source field list box and click button ➔ to move them to Columns Fields, Pivot Fields, 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**





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										
Total	37	1403	3	234	20	37	25	1	1	1

1 - 14 of 14 items

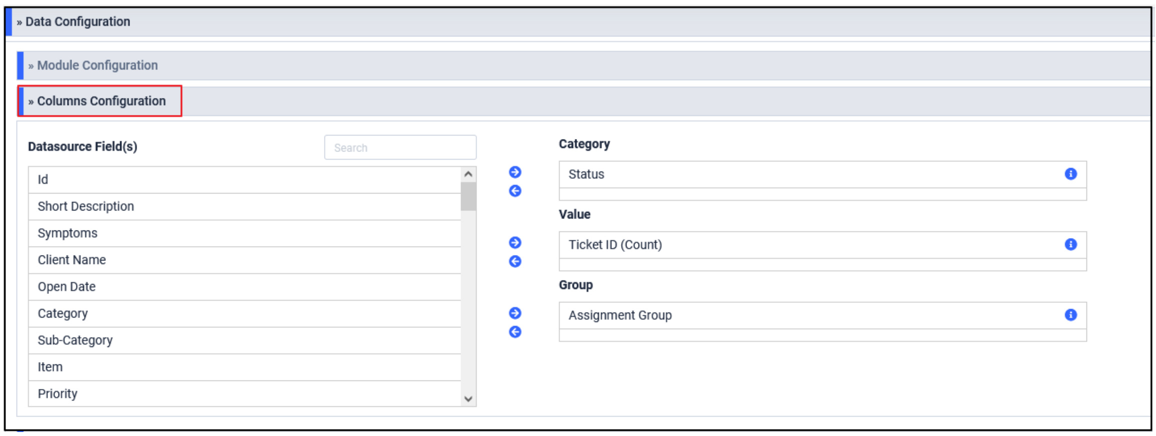

ADiTaaS CONQUERING COMPLEXITY
Incident Status By Category
Action
Search

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										
Total	37	1403	3	234	20	37	25	1	1	1

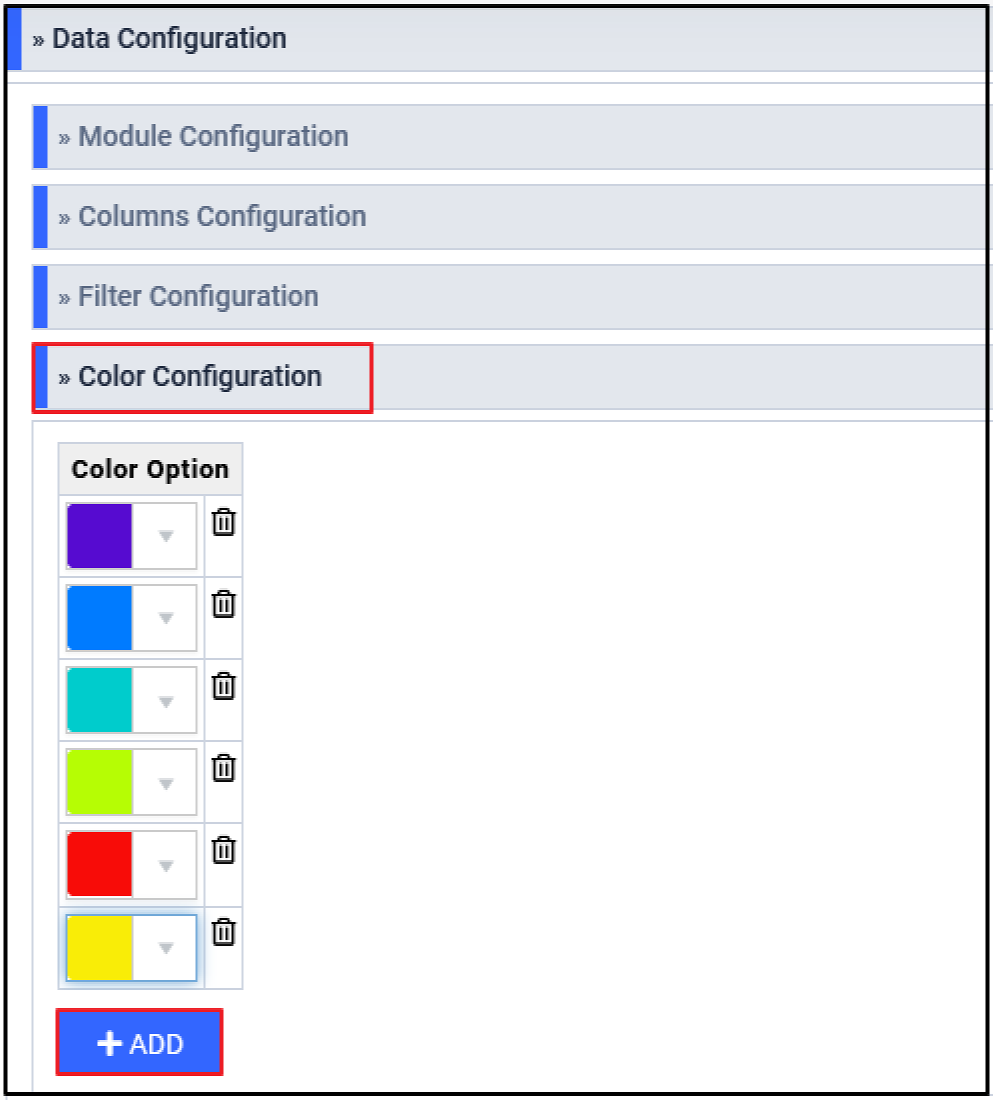
1 - 14 of 14 items

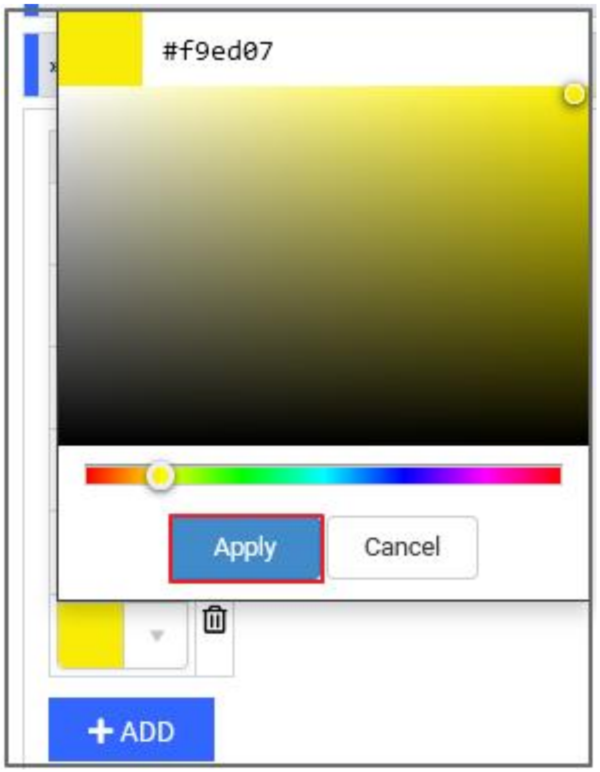
To generate Summary Reports

- 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**.

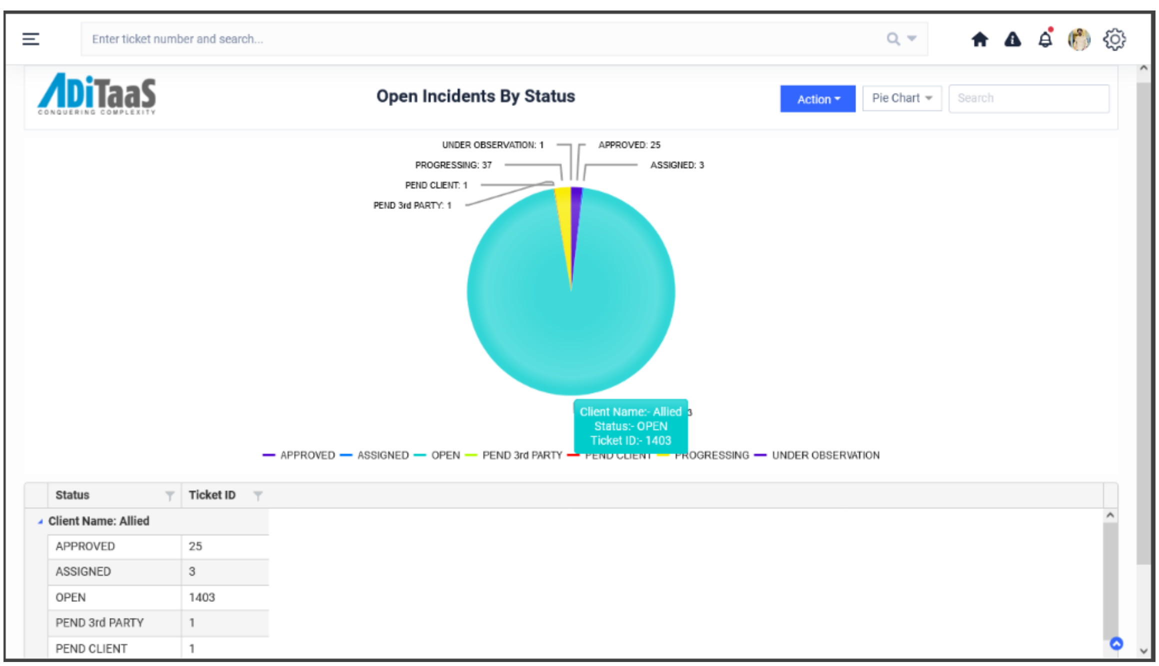


- Summary report facilitates to configure color configuration for charts. Navigate to color configuration wizard and click on Add to additional colors.


» Data Configuration
» Module Configuration
» Columns Configuration
» Filter Configuration
» Color Configuration
Color Option
+ ADD

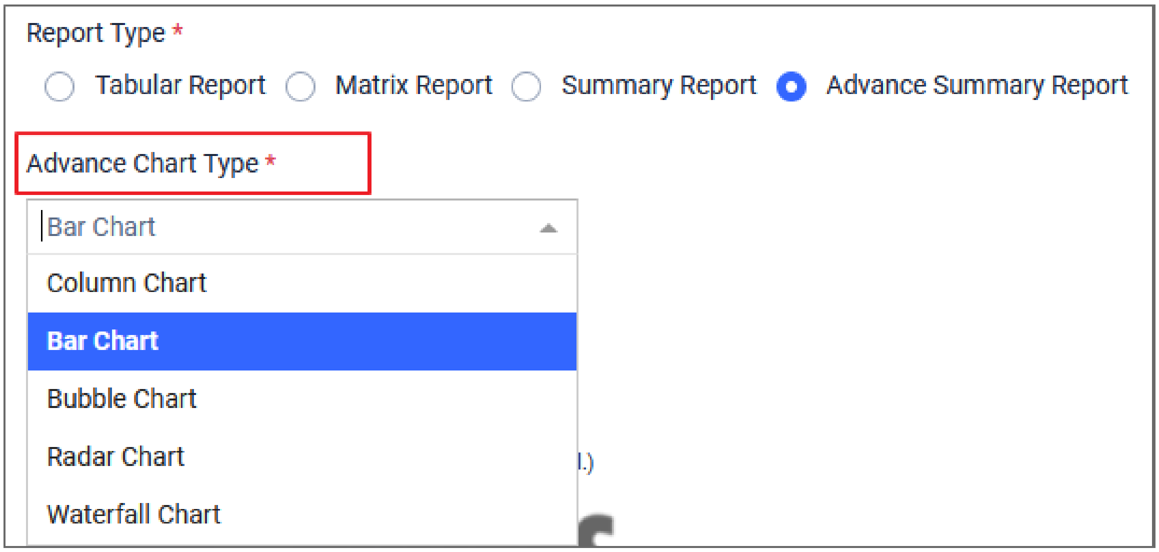


- Finish rest of the configuration and click on **Finish & View.**

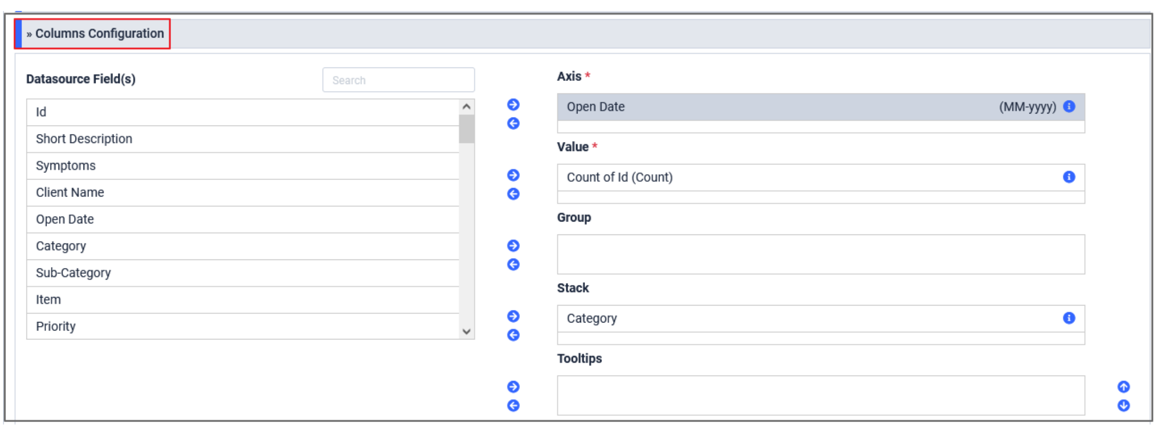


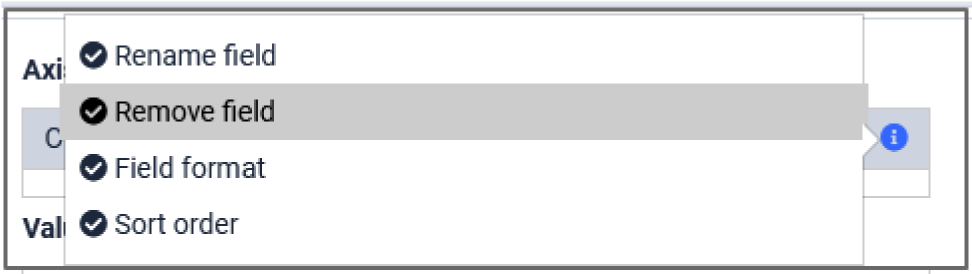
To generate Advance Summary Reports

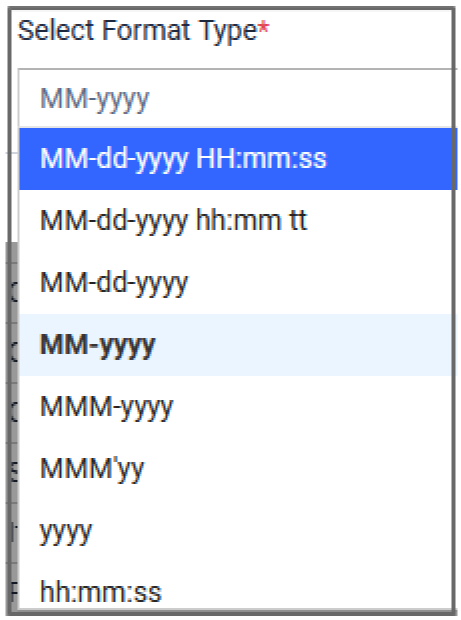
- Advanced Summary reports are more detailed and customized reports that allow you to list your data based on certain criteria. Select **Report type as Advance Summary Reports** and select the chart type. Depend on selected report type column configuration will be changed.



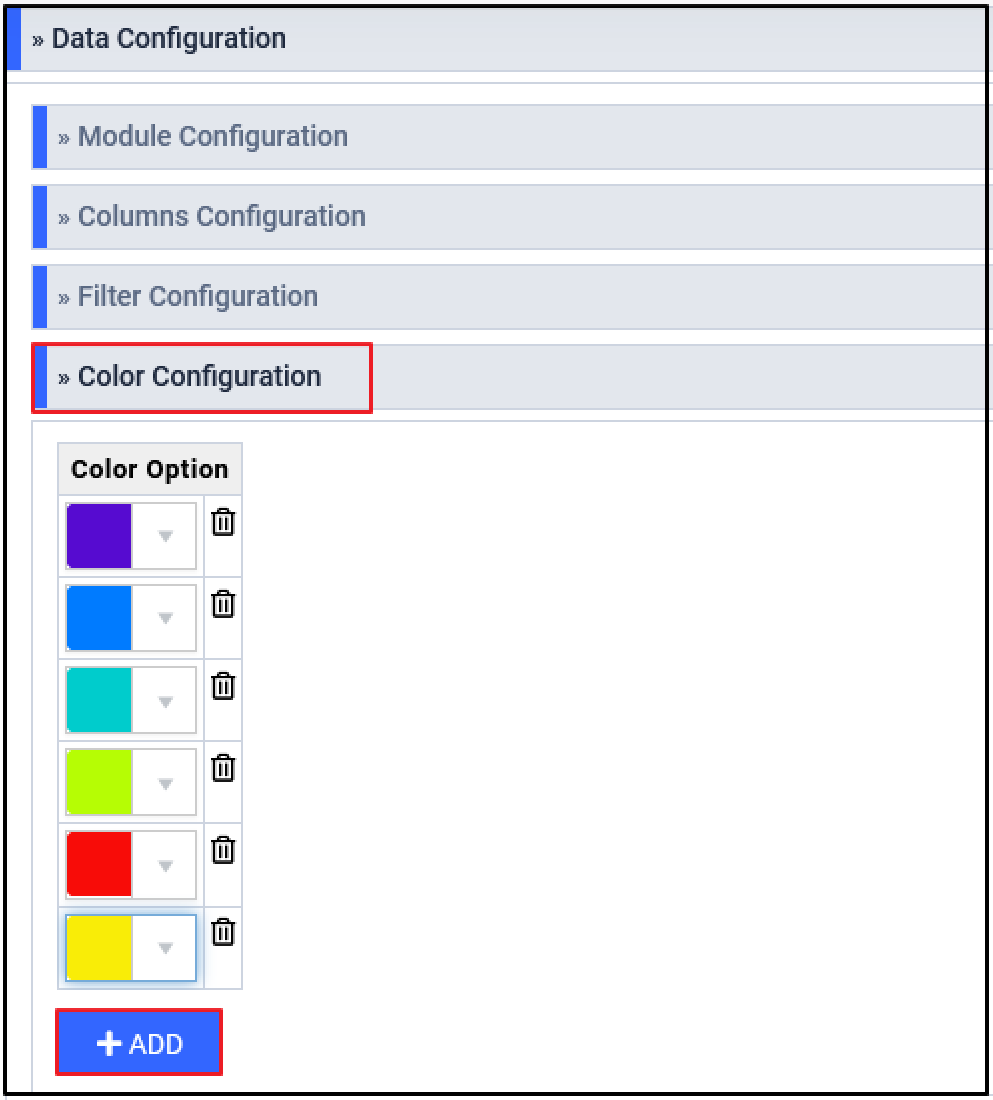
- Select the columns from the Data source field list box and click button to move them to Axis, Value, and Group and Stack box. Click the button if you want to remove any column from the Axis, Value, and Group and Stack box.
- There are action available at column field level to **Rename**, **Remove**, **Field Format**, **Sort** and get a **Row count** or **distinct count**.

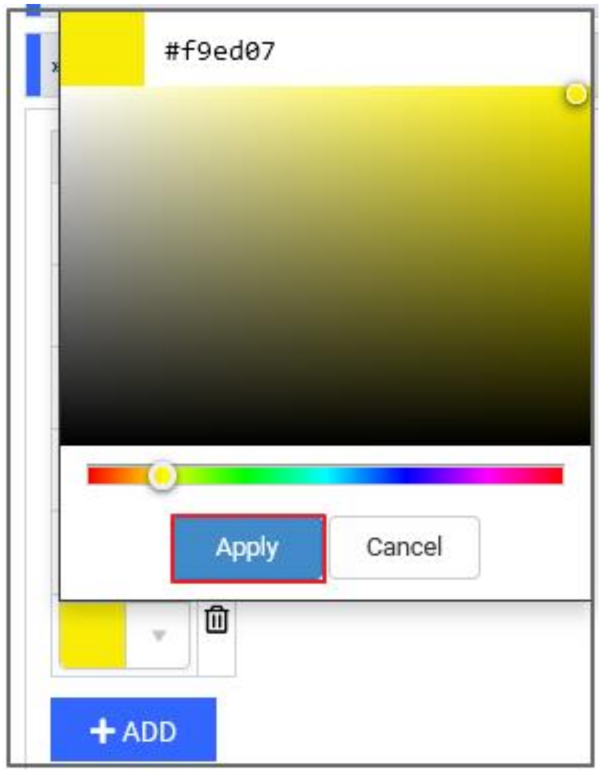




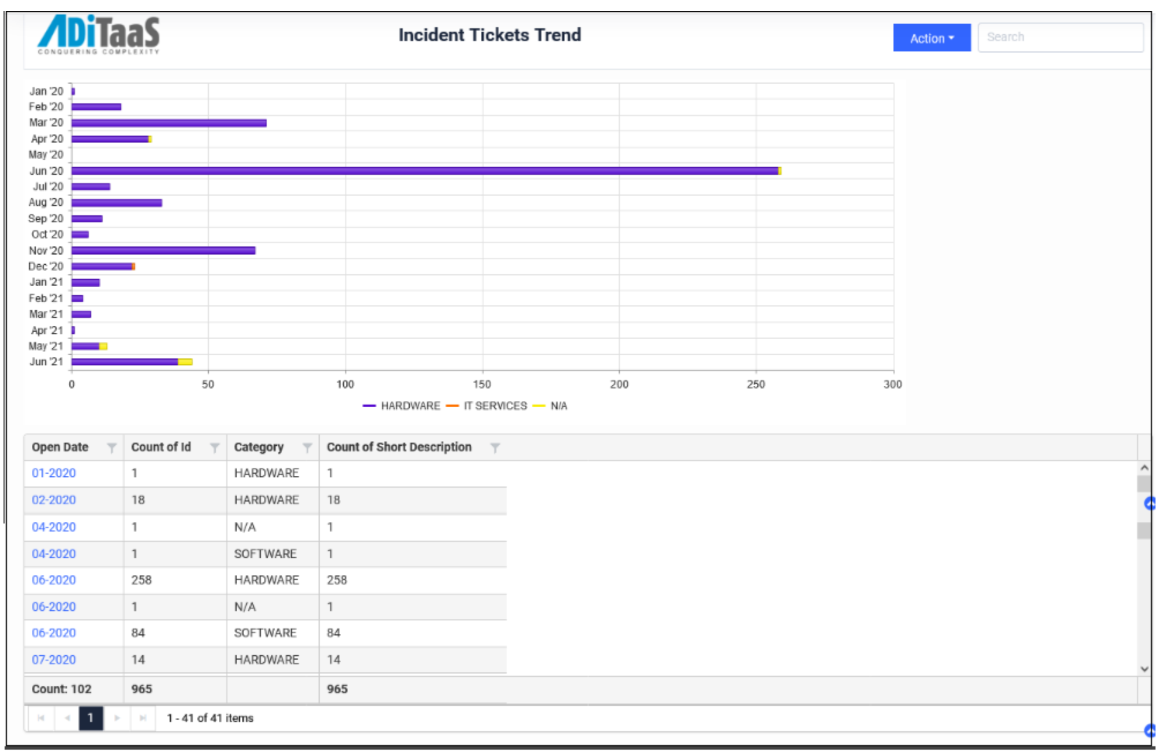


- Advanced Summary report facilitates to configure color configuration for charts. Navigate to color configuration wizard and click on Add to additional colors.


» Data Configuration
» Module Configuration
» Columns Configuration
» Filter Configuration
» Color Configuration
Color Option
+ ADD



- Finish rest of the configuration and click on **Finish & View.**

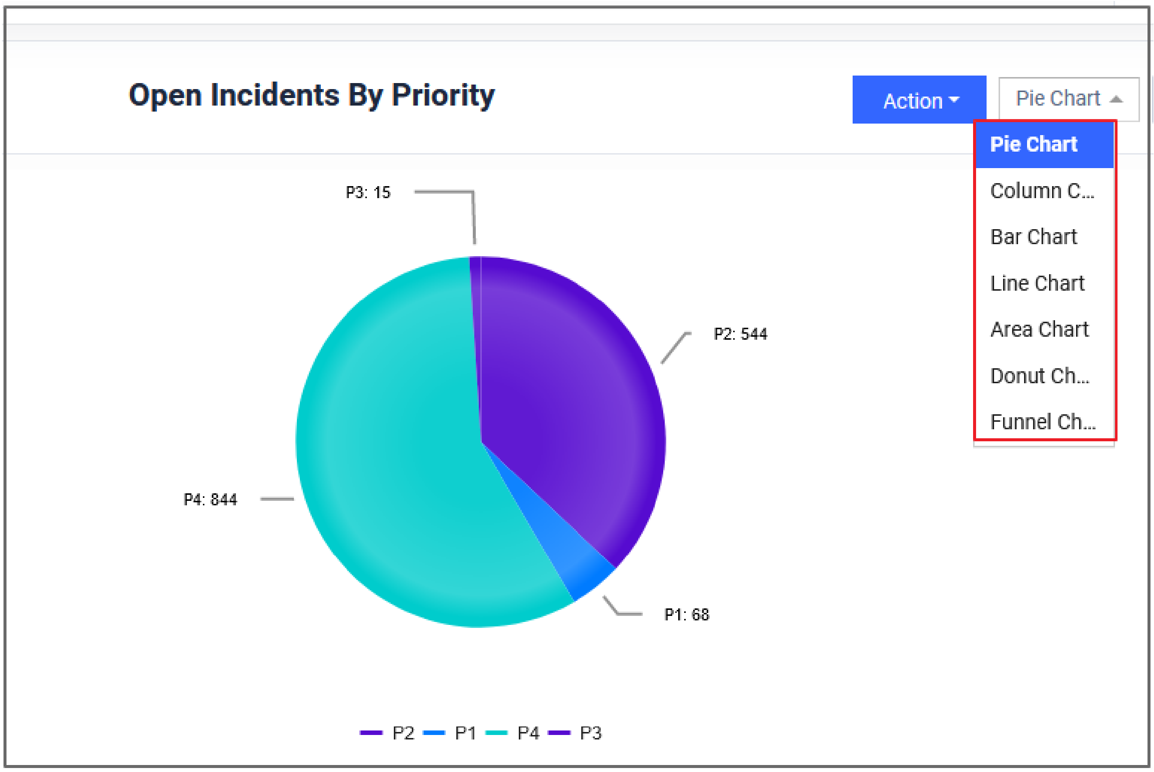


Drill down option is enabled in all graphical reports. Clicking on graph, page will display drill down report and clicking on specific ticket will take to the next level to view the real ticket data.

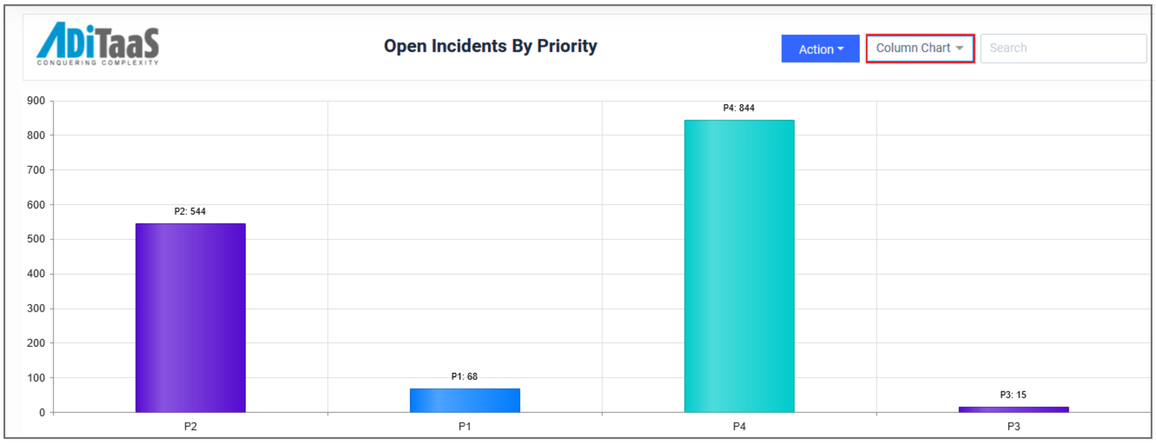
Change Chart Type

Tool Facilitates to change the chat and modifications can be seen on real time.

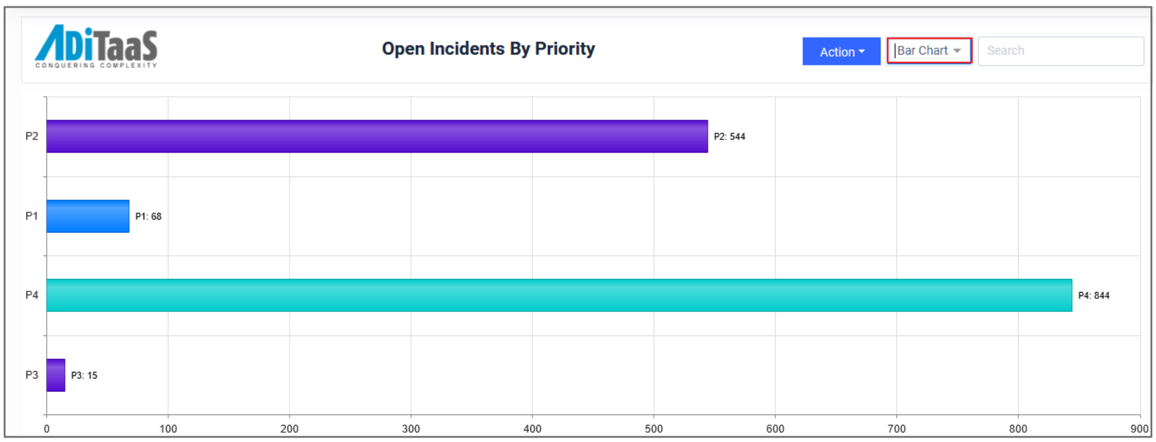
Pie Chart



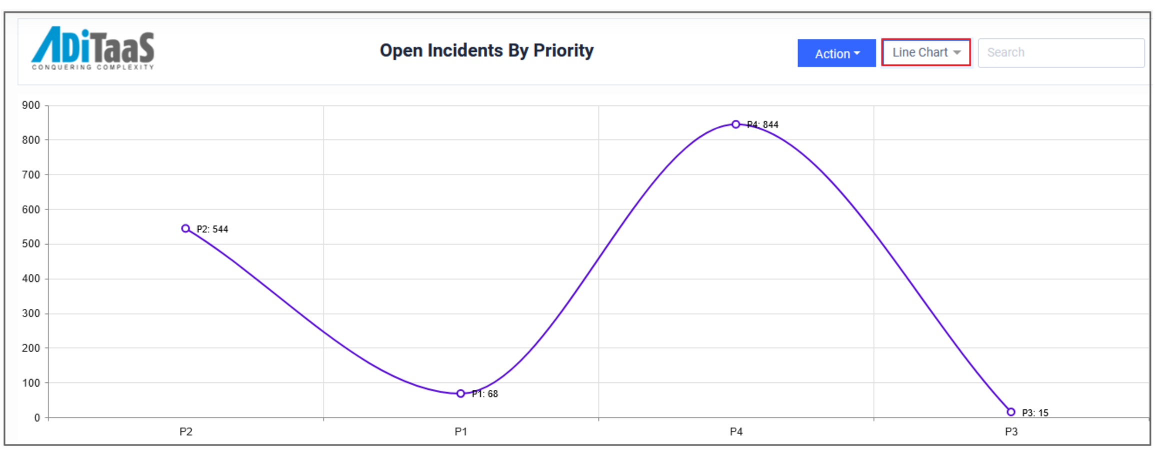
Column Chart



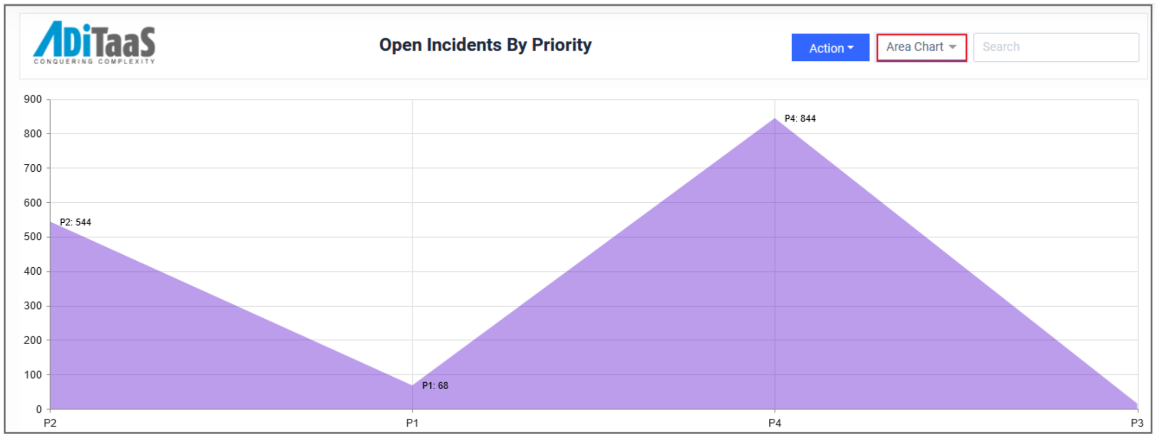
Bar Chart



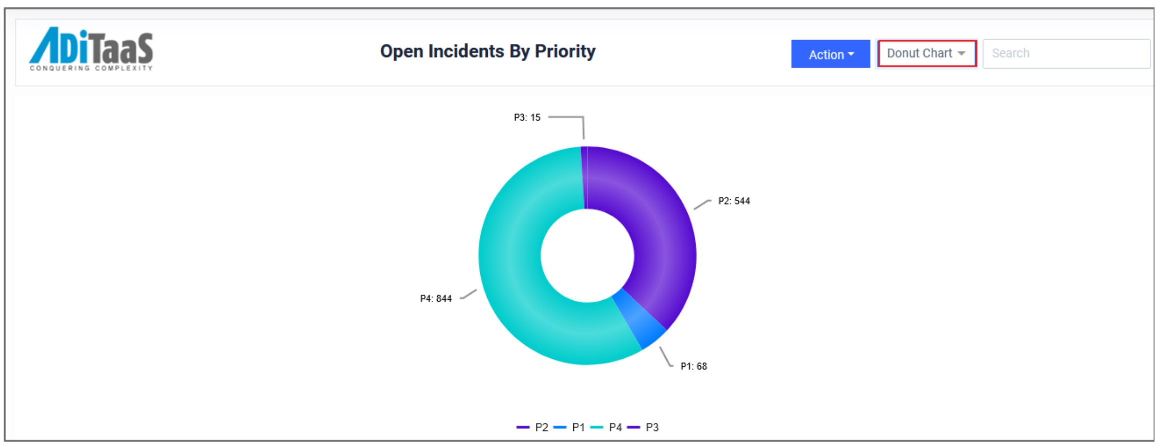
Line Chart



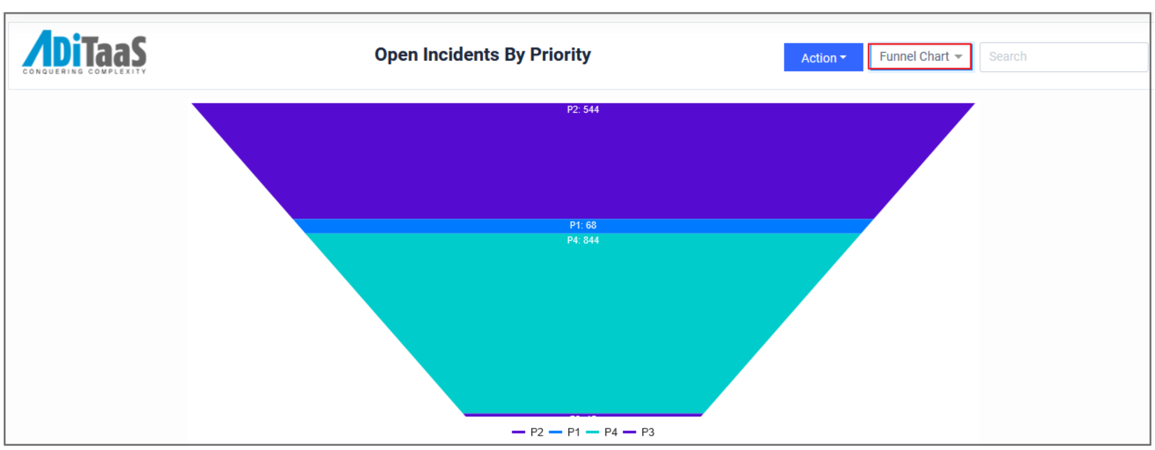
Area Chart



Donut Chart

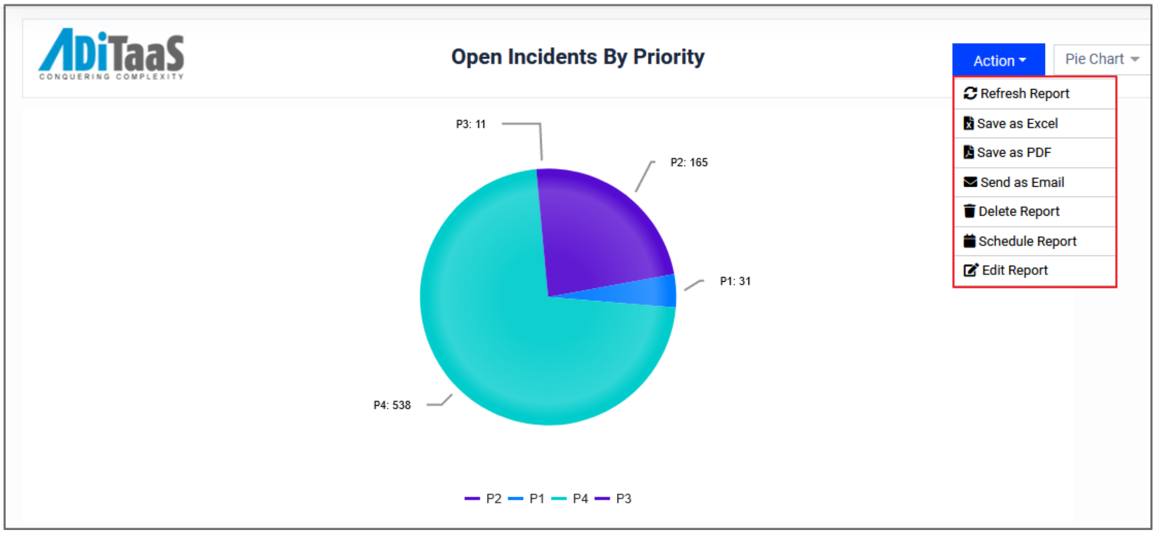


Funnel Chart



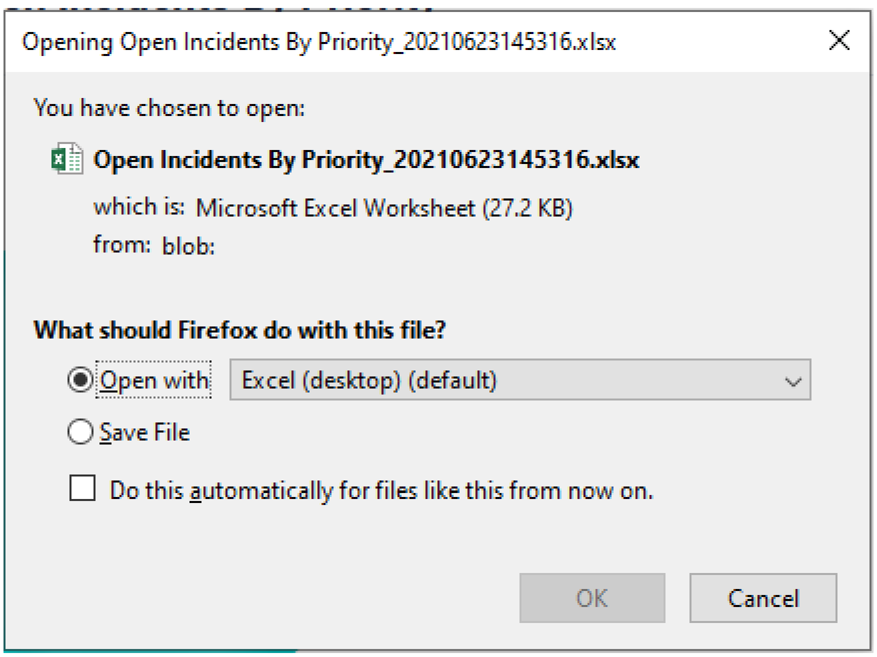
REPORT- ACTIONS

There are various actions can be performed on configured report.

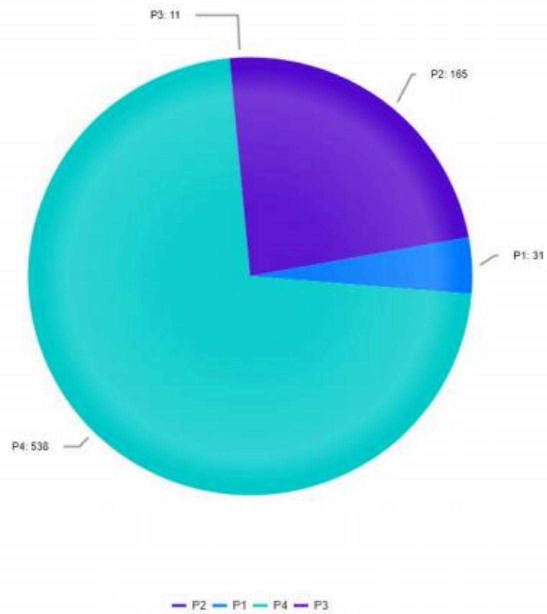


REFRESH REPORT- Report can be refreshed by clicking on Refresh Report.

SAVE AS EXCEL/PDF-You can export report in Excel.PDF.



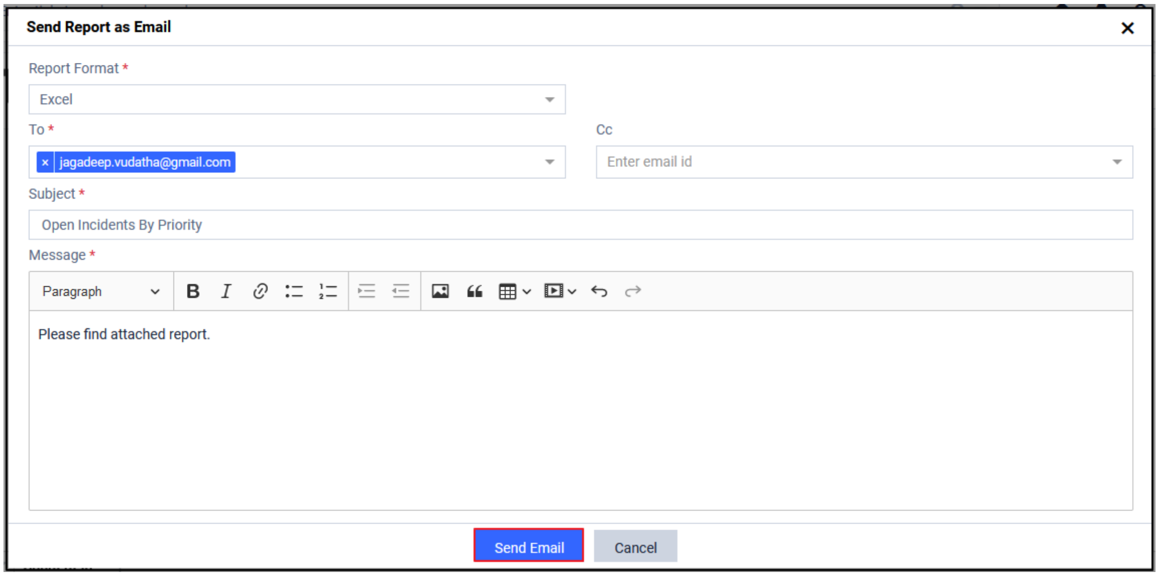
ADiTaaS CONQUERING COMPLEXITY Open Incidents By Priority



Priority	Count of Id
P2	165
P1	31
P4	538
P3	11
Total	**745**

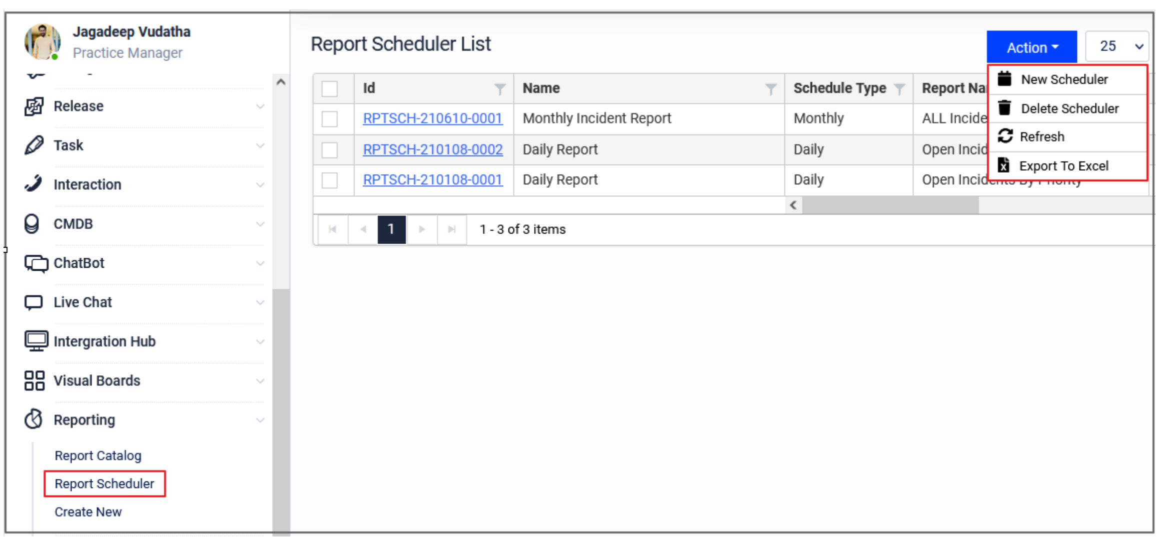
SEND AS EMAIL- You can email reports to specified users by selecting the **Send as Email** option.

- 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.



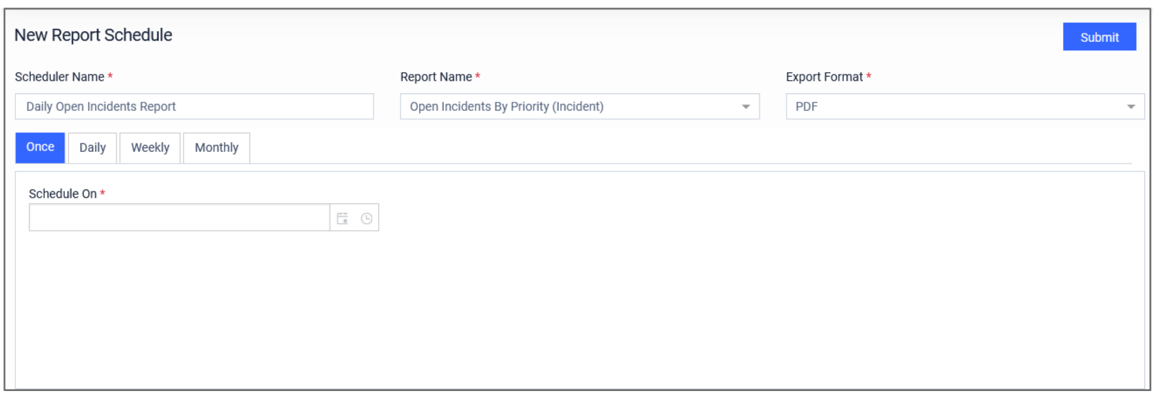
Schedule Report/New Scheduler

Scheduled report can be configured from 2 ways.

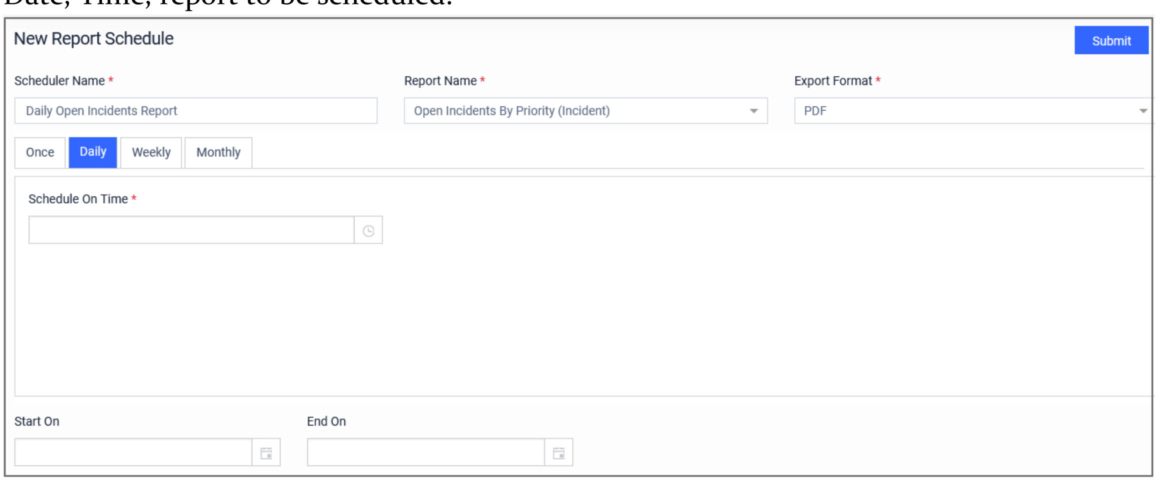
- Open the corresponding report that you wish to mail as an attachment.
  - Click on Action → **Schedule Report**

- Navigate to Reporting Module from left menu bar
    - Click on Report Scheduler, displays all configured report scheduler list
    - Click on Action → **New Scheduler**

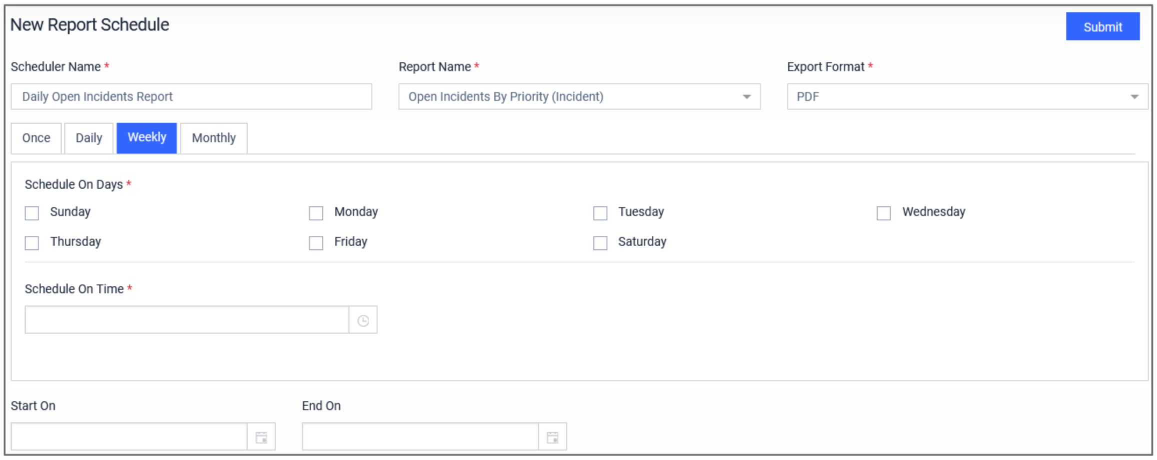
1. On clicking, New scheduler page will be displayed
2. Specify the relevant Scheduler Name in the given text field. This is a mandatory field.
3. Select the Report that required to be scheduled from drop down list, the list will display all the available reports.
   If scheduler action is selected from 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.



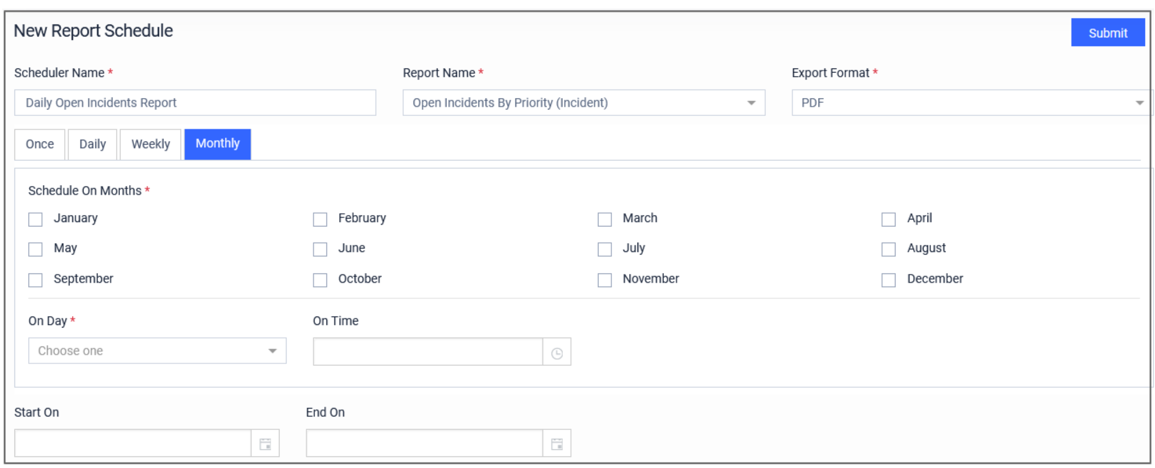
6. To generate reports on a daily basis click Daily Report button and specify the From Date, Time, report to be scheduled.



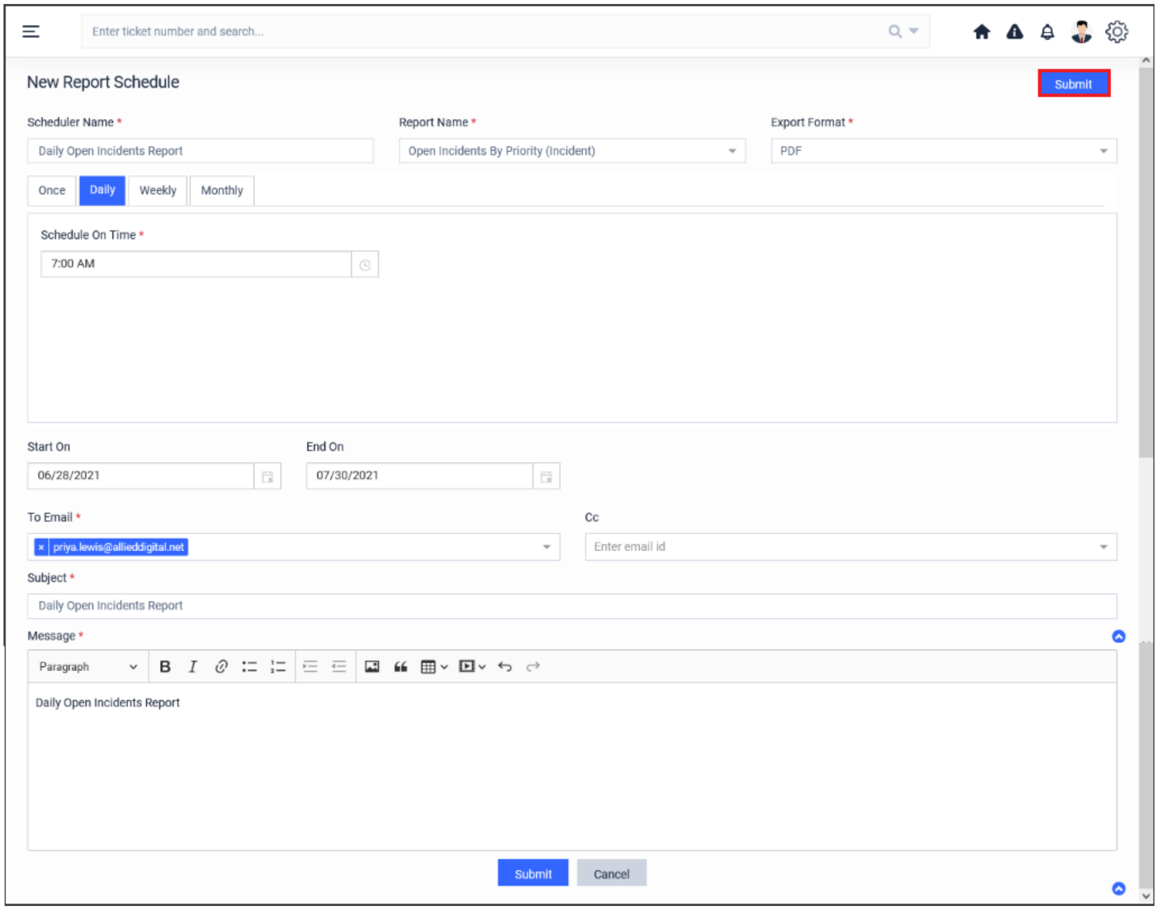
7. To generate weekly report click Weekly Report button. Specify the days of the week on which you want to generate reports by selecting the check box. Also specify the time, report to schedule.



8. 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.

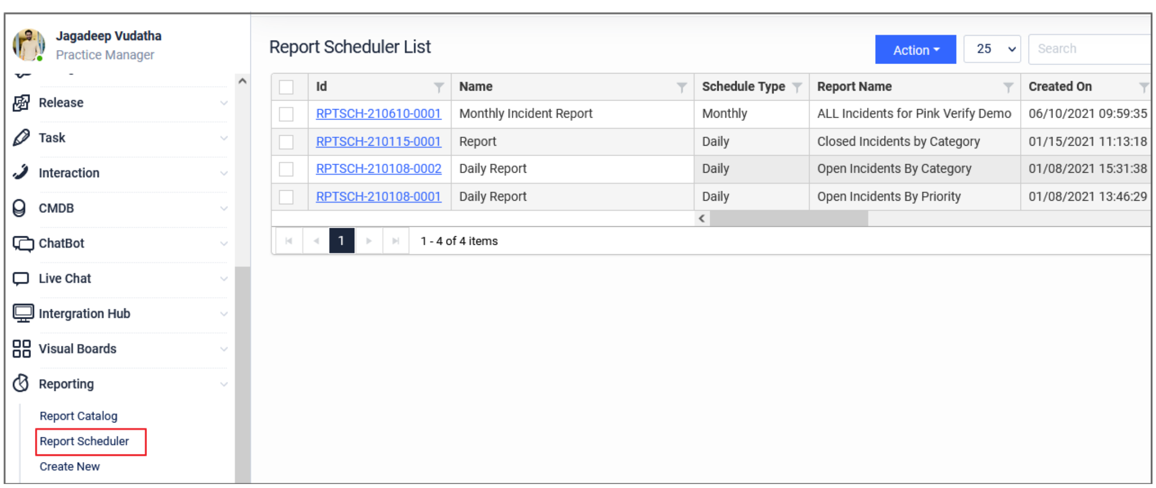


9. Specify the E-mail ID of the person to whom the generated report has to be sent. Enter email recipients details in To and CC. You can also add external email ids.
10. Enter the relevant **Subject** and **Message** for scheduler email
11. Click on **Submit**



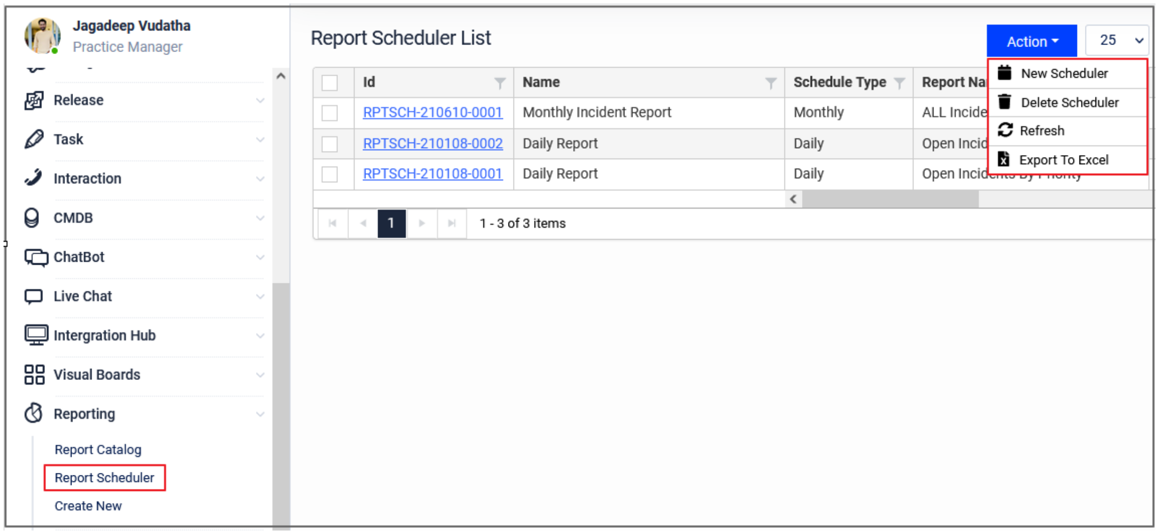
View /Edit Report Scheduler

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.



Delete Report Scheduler

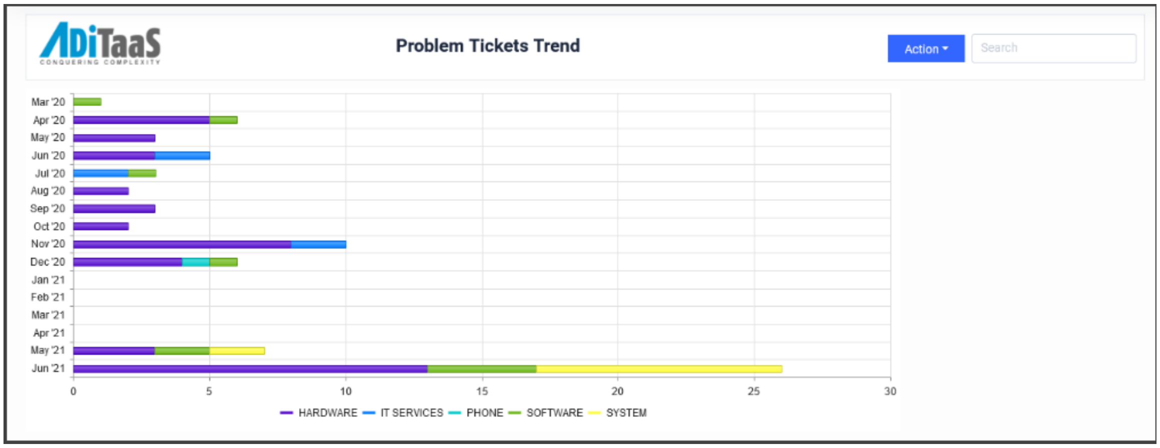
1. Navigate to **Reporting module** from left menu bar
2. Click on **Report Scheduler**, Displays a list of all configured report schedulers
3. Select the relevant scheduled report that required to delete
4. Click on **Action → Delete Scheduler**
5. On clicking scheduler will be deleted.

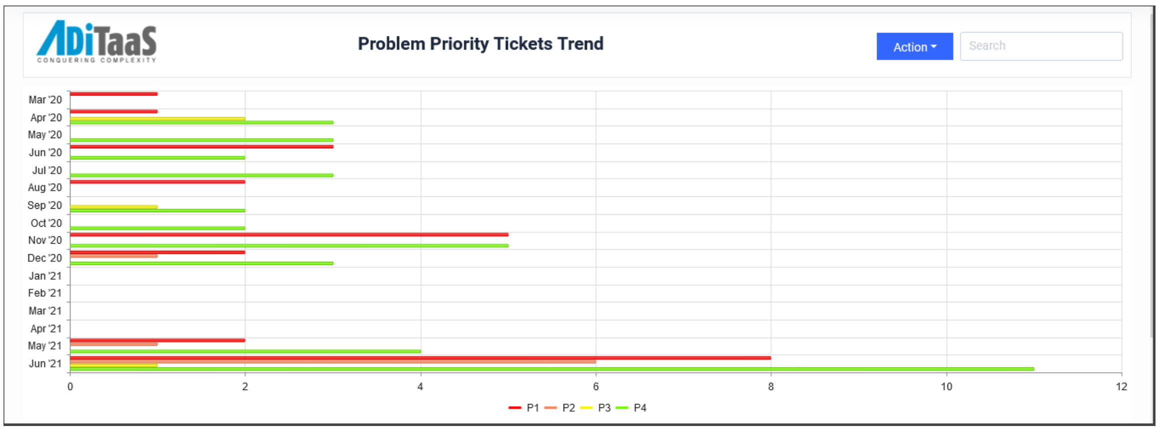


EDIT REPORT- By clicking on edit report any changes or modification can be performed on configured report. Make your changes to the fields, filters, and summaries that you'd like to modify, just as you would when creating a new report.

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

Action | 50 | Search

Id	Problem Description	Requestor Name	Category Change Count	Queue Change Count	Category	Sub Category	Item	I
PR-200410-0001	Intermittent network connection	Jagadeep Vudatha	1	1	HARDWARE	REPLACMENT	MACHINE SHIFT	N
PR-200511-0008	Intermittent network connection	Leah Bostic	1	1	HARDWARE	REPLACMENT	MACHINE SHIFT	N
PR-200511-0009	Intermittent network connection	Deepak Shukla	1	1	HARDWARE	REPLACMENT	MACHINE SHIFT	N
PR-200605-0001	sdgdfg	Jagadeep Vudatha	1	1	HARDWARE	REPLACMENT	MACHINE SHIFT	H
PR-200605-0003	dfgh	Jagadeep Vudatha	1	1	HARDWARE	REPLACMENT	MACHINE SHIFT	H
PR-200608-0002	sdfgsdfg	Jagadeep Vudatha	1	1	HARDWARE	REPLACMENT	MACHINE SHIFT	L
PR-200611-0003	sdasda	Jagadeep Vudatha	1	1	IT SERVICES	AUDIO/VIDEO	SETUP VIDEO CONFERENCE	H
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	REPLACMENT	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
Opened On: Nov-2020						
Id: PR-201110-0001						
IN-210604-0005	Account Lockout	06/04/2021 10:06:30	Jagadeep Vudatha	Jagadeep Vudatha	OPEN	Service Desk
Id: PR-201112-0003						
IN-210610-0015	UNABLE TO INSTALL MS OFFICE	06/10/2021 12:22:30	Jagadeep Vudatha	Jagadeep Vudatha	PROGRESSING	Network Support
Id: PR-201117-0001						
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
Id: PR-201120-0001						
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
Count: 46						

ADiTaaS CONQUERING COMPLEXITY

Top 5 Problem Category

Action 50 Search

Category	Count
SYSTEM	11
HARDWARE	46
IT SERVICES	6
SOFTWARE	10
PHONE	1
Count: 5	74

1 1 - 5 of 5 items

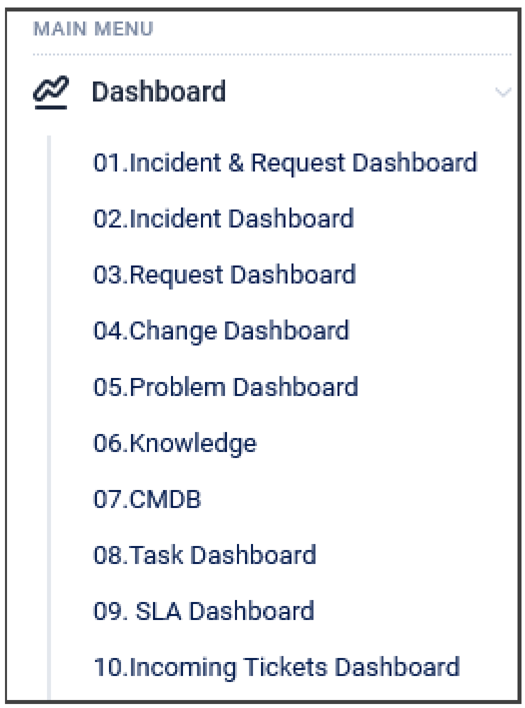
Dashboards

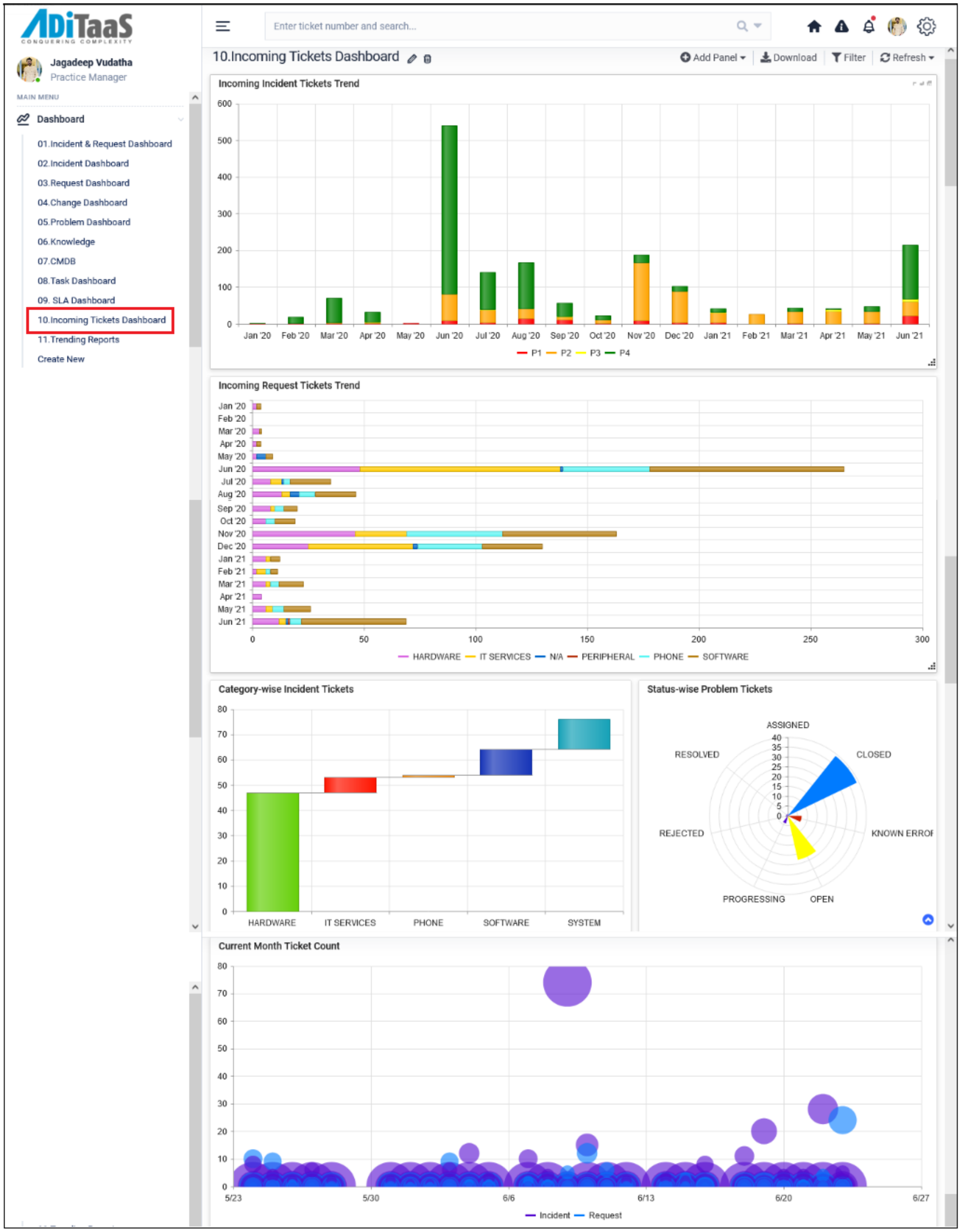
The Dashboard is a visual display of real-time information, consolidated and arranged in a single view so that it can be easily monitored. The Dashboard displays various statistical data related to number of incidents, requests, changes, problems and assets based on various criteria.

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

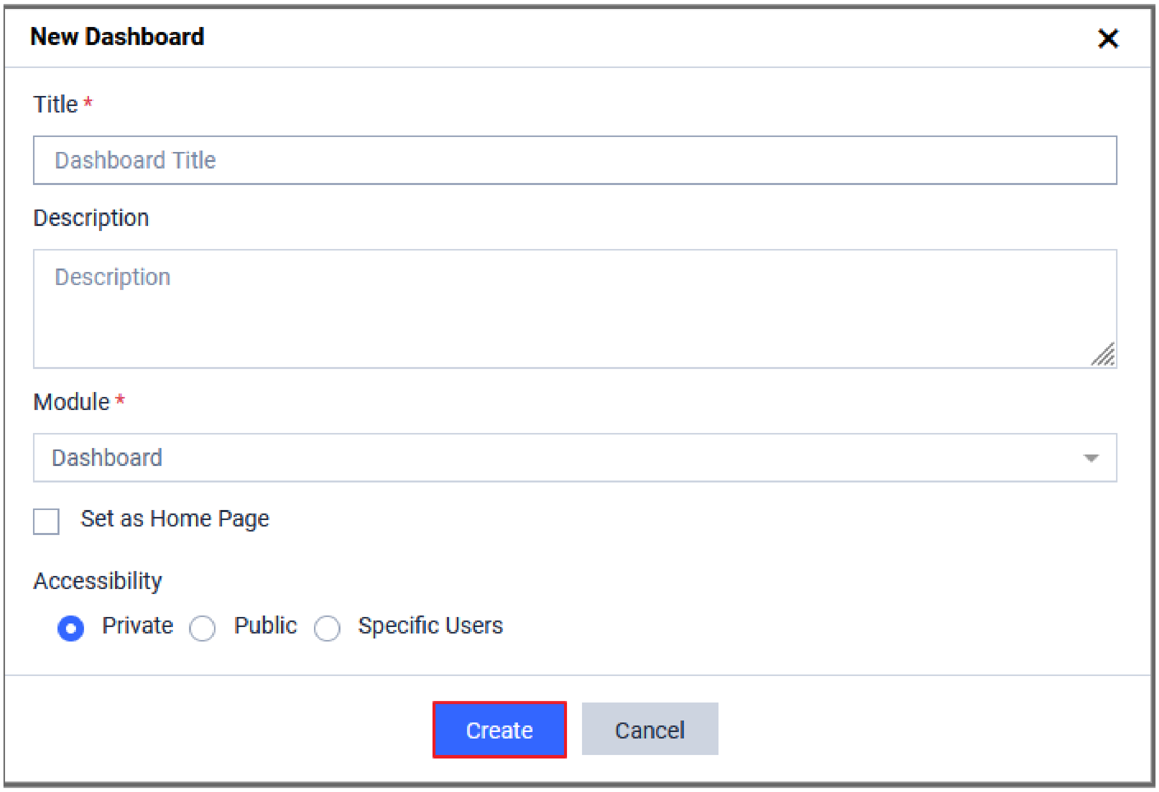
Along with creation of new dashboards, ready available dashboards are accessible for use.



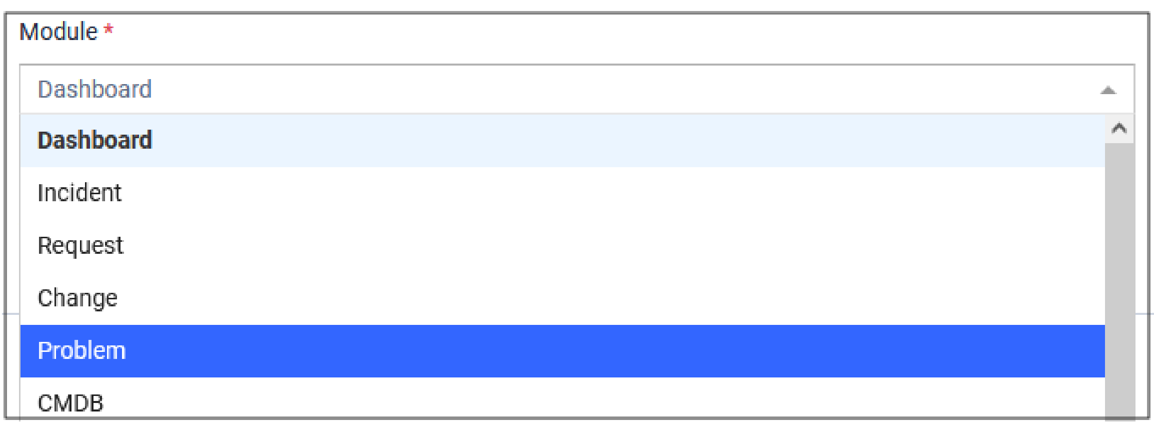


CREATE NEW DASHBOARD

1. Navigate to **Dashboard** from left menu bar
2. Click on **Create New**

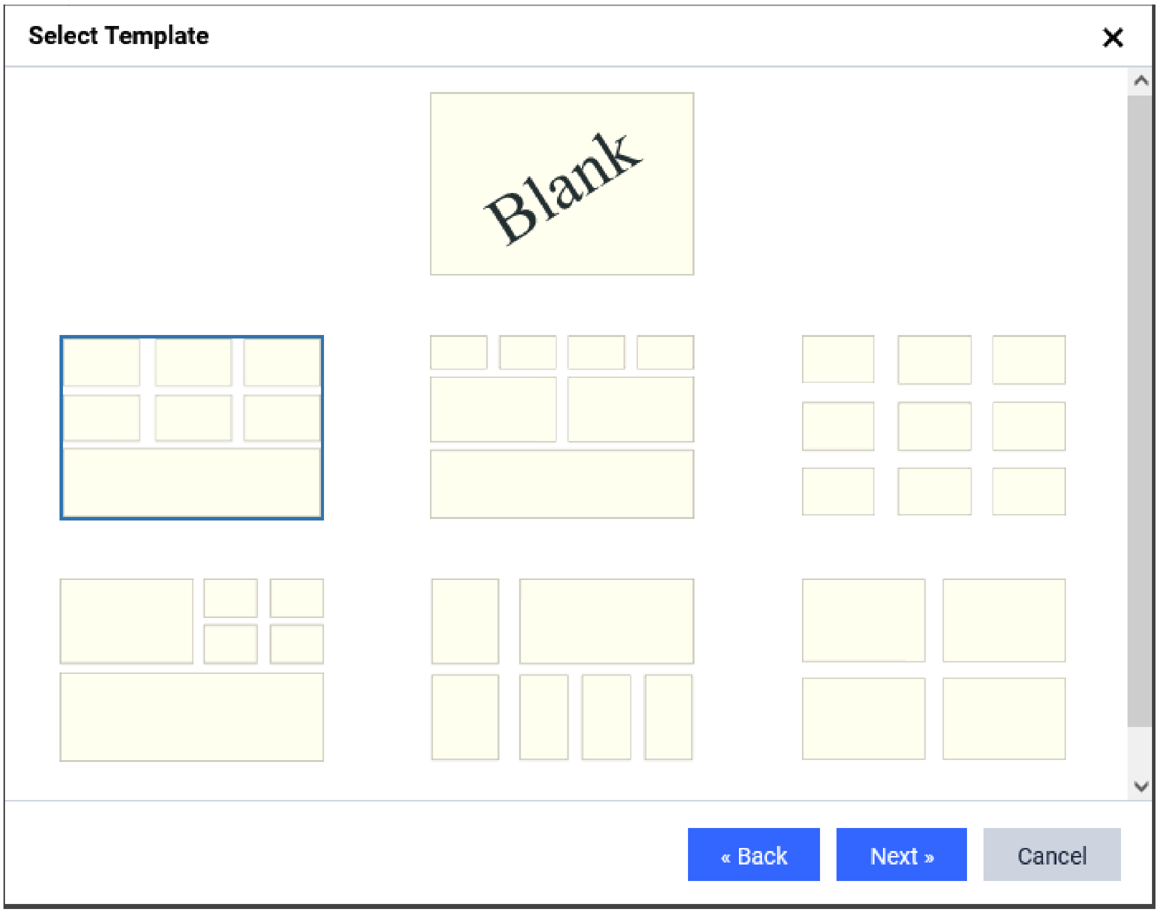


3. Specify the relevant **Title** for dashboard in the given text field. This is a mandatory field.
4. Select the **Module** Name from the drop down list under which you want to display the dashboard

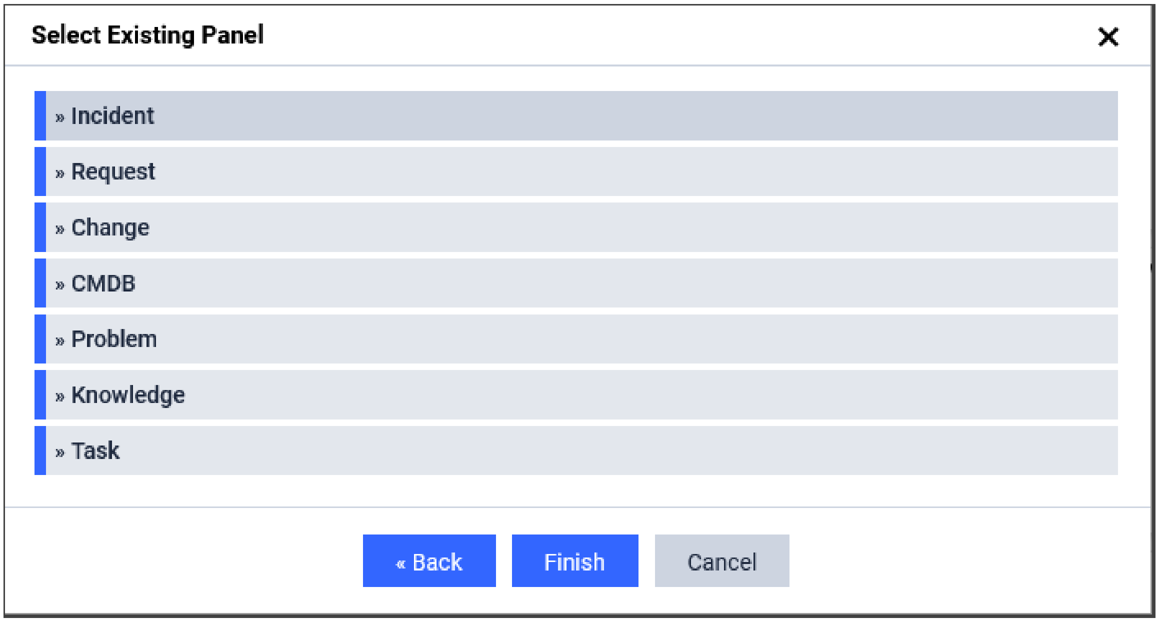


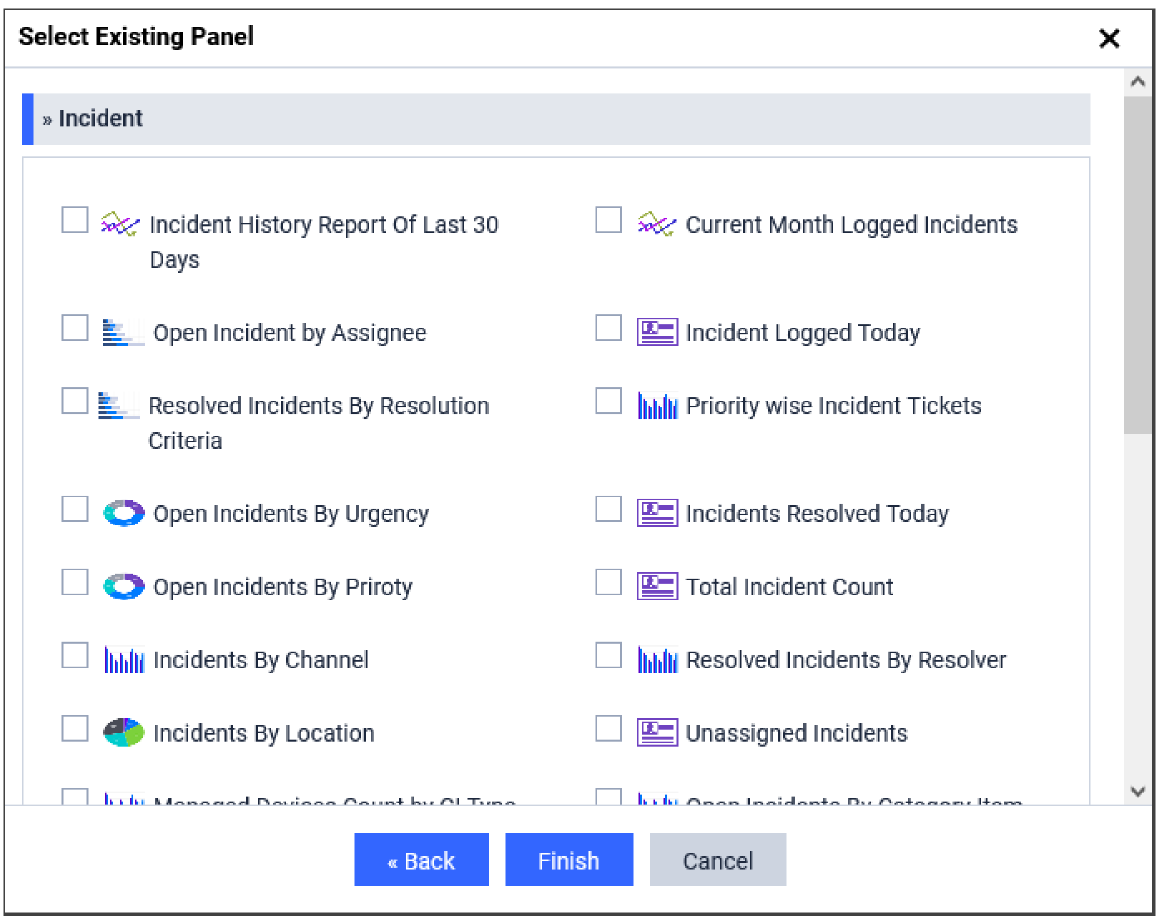
5. Choose the **Accessibility** selecting the radio buttons. You can create **Private, Public** and **Specific Users.**
   - **Private**- Report will be visible only to the user who has created the report
   - **Public**- Report will be visible to all
   - **Specific Users** - Report will be visible only to the specified users

6. Click on **Create**
7. Tool facilitates list of Templates. Select the required **Template** from the list

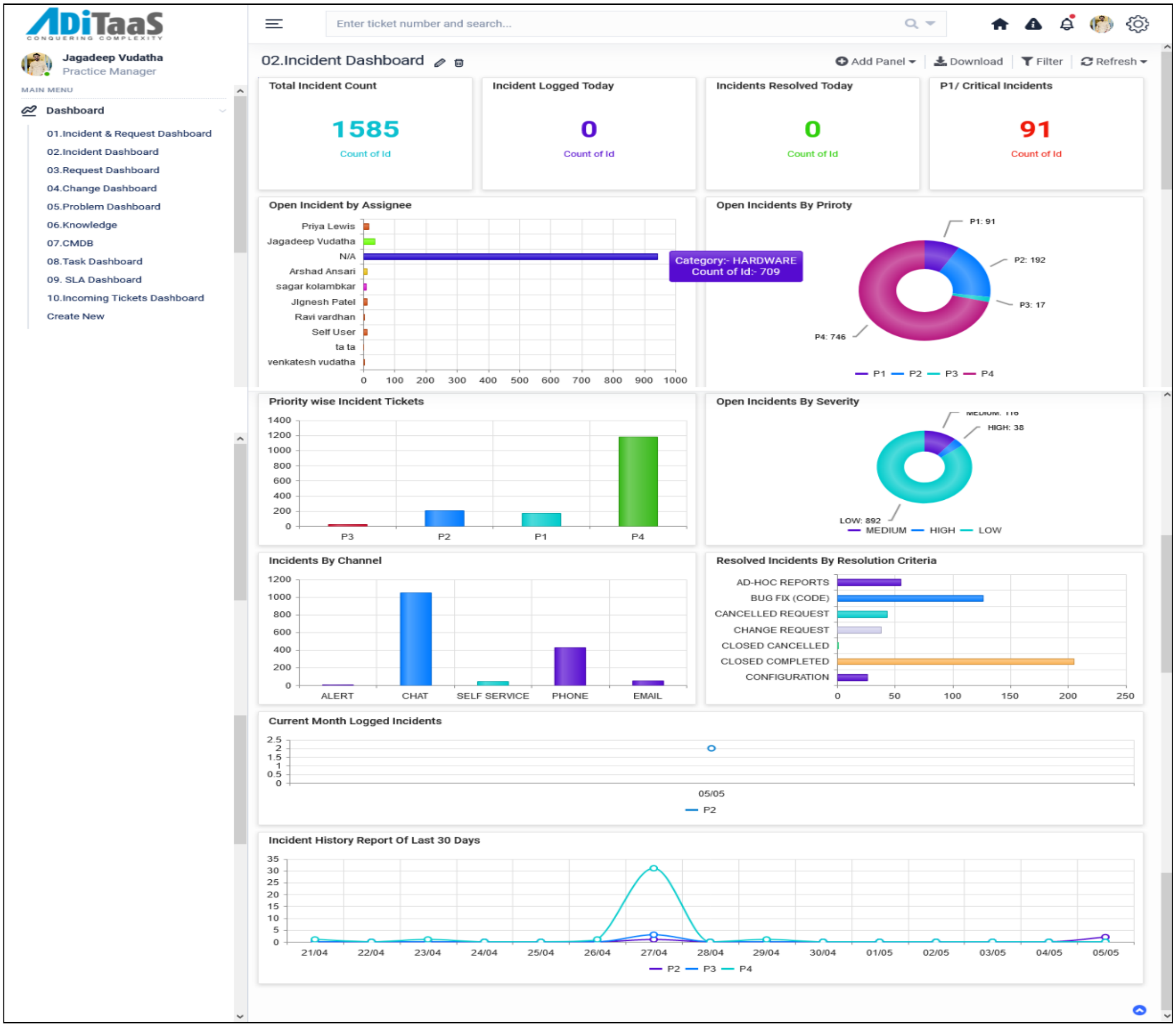


8. Click on **Next**
9. Select required widgets from **Select Existing Panel** by clicking on checkbox. At a time multiple widgets can be selected from different modules.





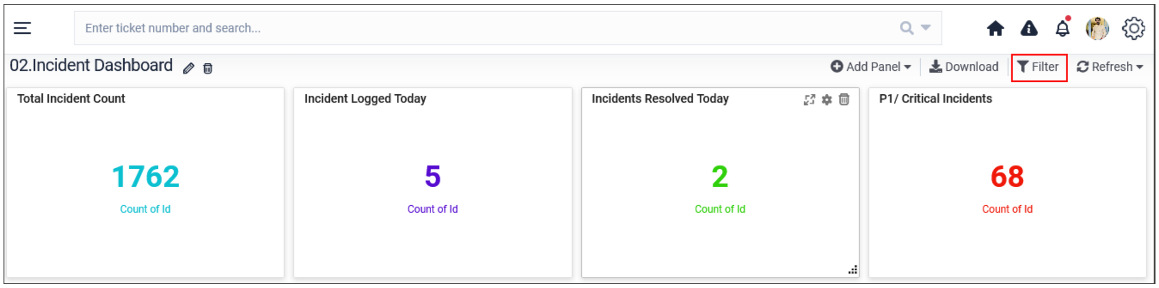
10. Click on **Finish**

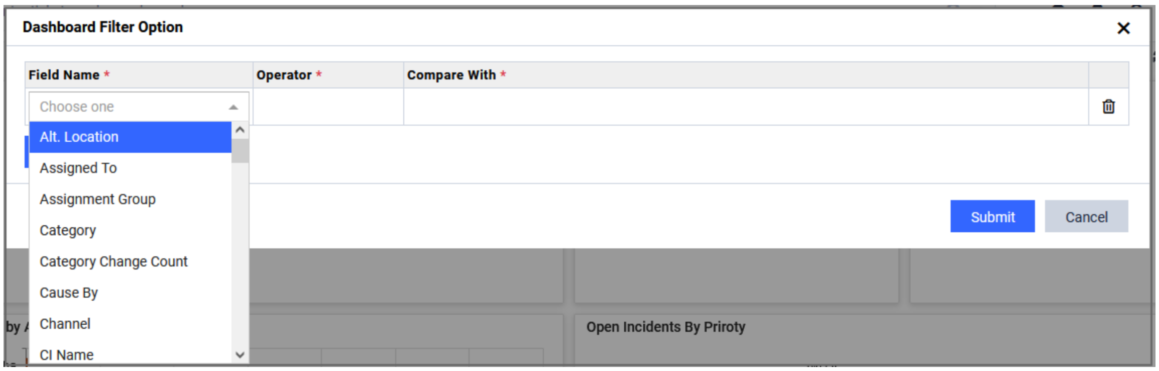


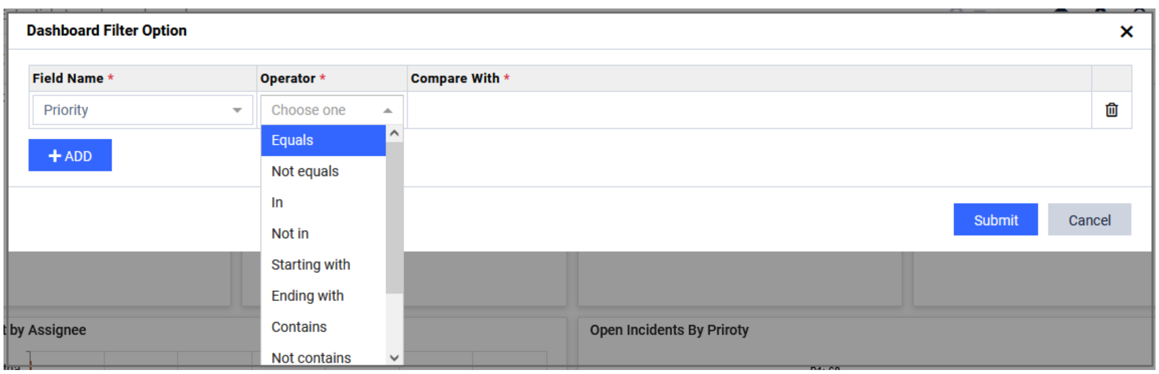
APPLY FILTER ON DASHBOARD

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.


Enter ticket number and search...
02.Incident Dashboard
Add Panel
Download
Filter
Refresh
Total Incident Count
1762
Count of Id
Incident Logged Today
5
Count of Id
Incidents Resolved Today
2
Count of Id
P1/ Critical Incidents
68
Count of Id


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
Open Incidents By Priroty

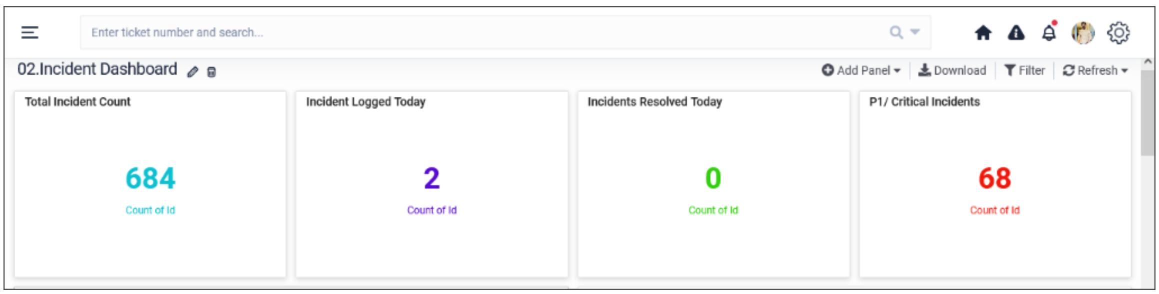

Dashboard Filter Option
Field Name *
Operator *
Compare With *
Priority
Choose one
Equals
Not equals
In
Not in
Starting with
Ending with
Contains
Not contains
ADD
Submit
Cancel
by Assignee
Open Incidents By Priroty


Dashboard Filter Option
Field Name *
Operator *
Compare With *
Priority
In
Choose one
P1
P2
P3
P4
ADD


Dashboard Filter Option
Field Name *
Operator *
Compare With *
Priority
In
P1
P2
ADD
Submit
Cancel

Click on **Delete** icon to remove the filter condition.

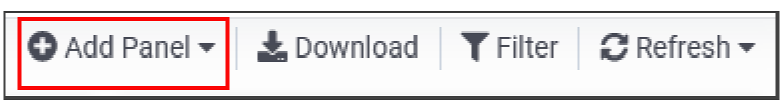
Dashboard values are changed according to the filter condition

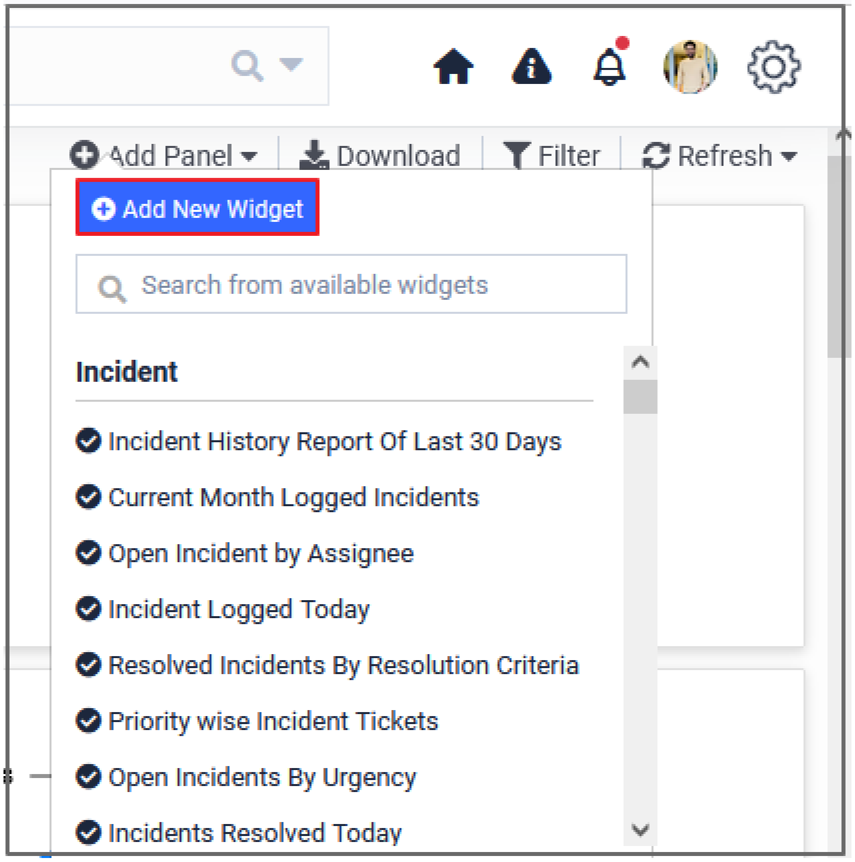


APPLY A NEW WIDGET TO THE DASHBOARD

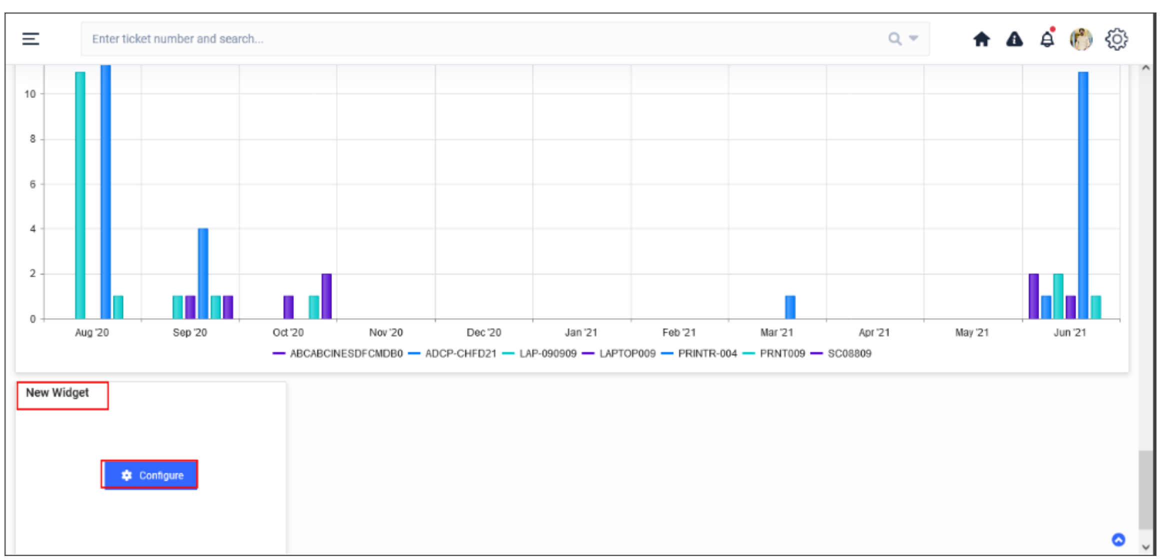
Tool provides a ready available widgets to add in dashboard.

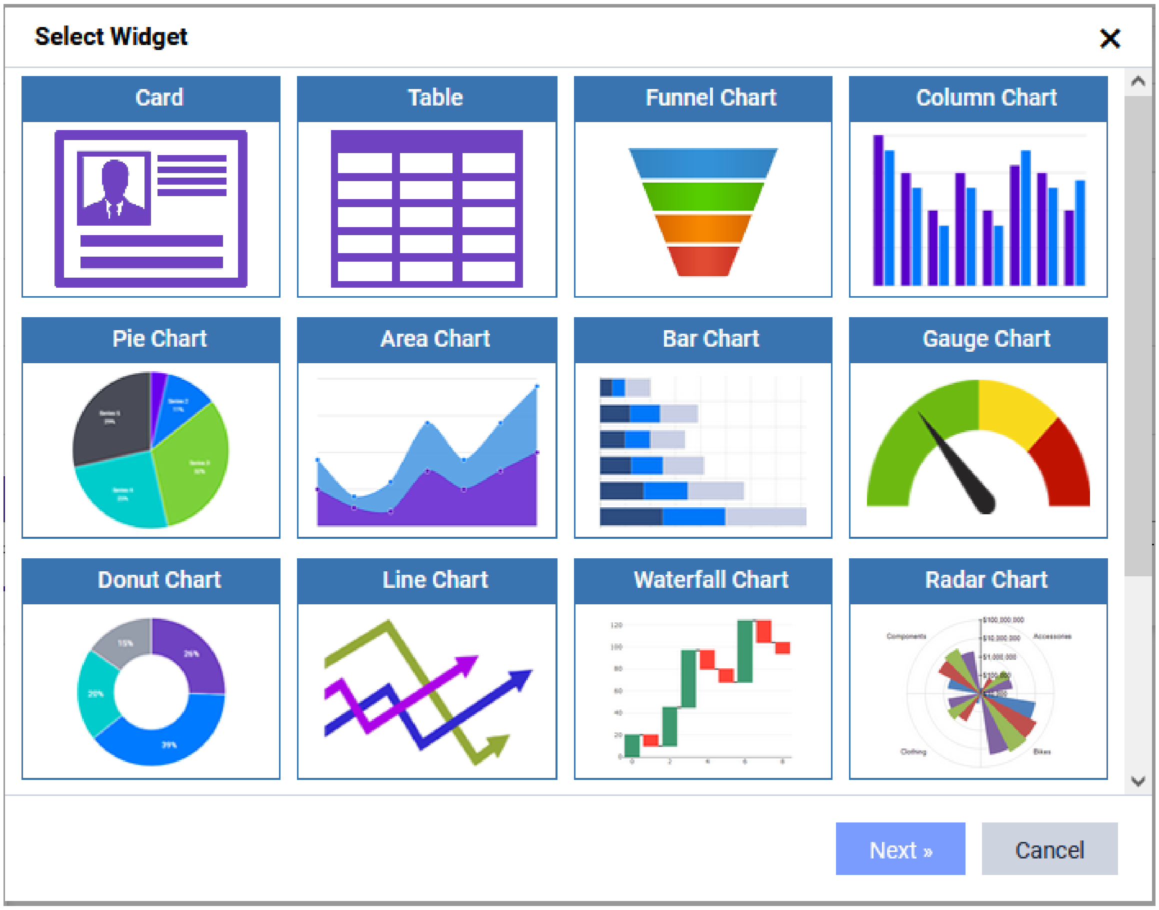
1. Click on **Add Panel** from top dashboard action items
2. Tool enables you to create new widgets that meet your need if you are unable to find them from the list widgets already available. To create new widget click on **Add New Widget**
3. To add an existing widget to dashboard , click on any required widget name from the available list

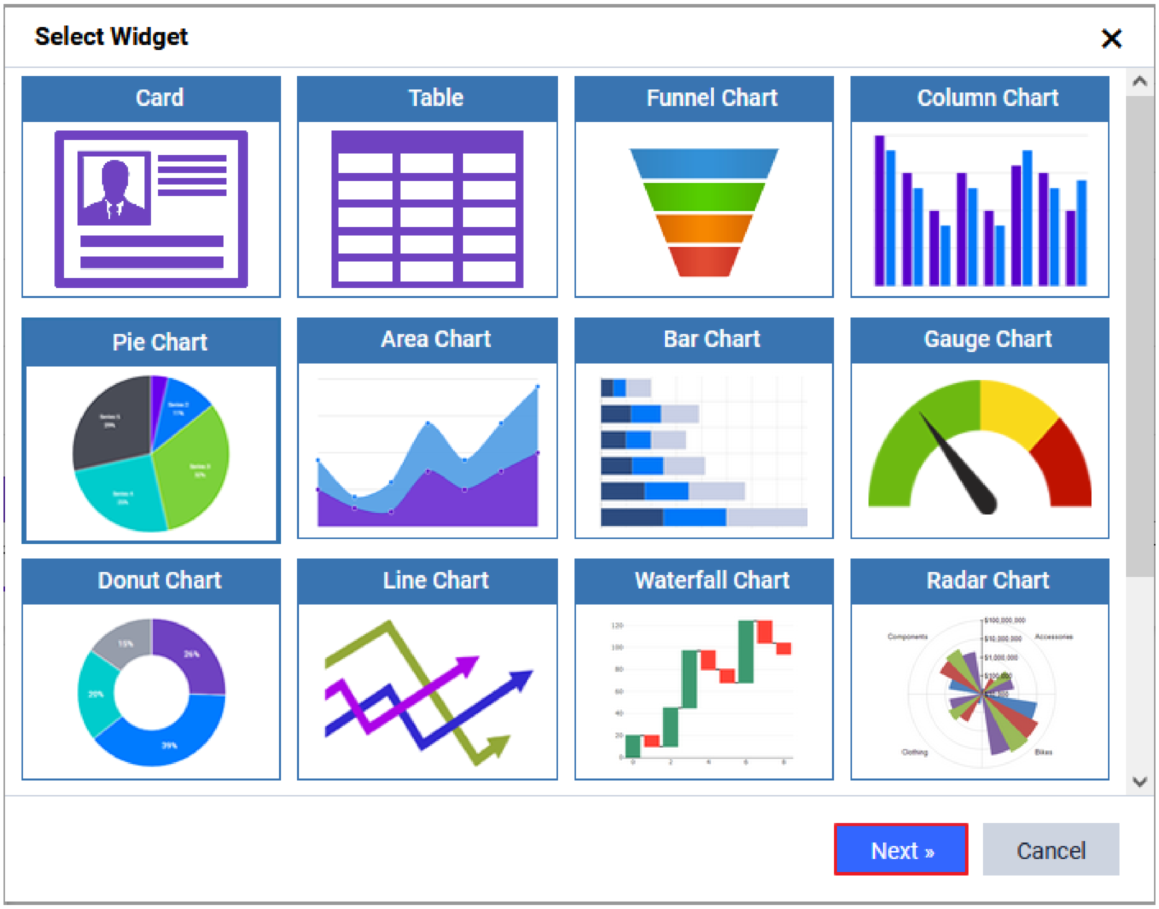




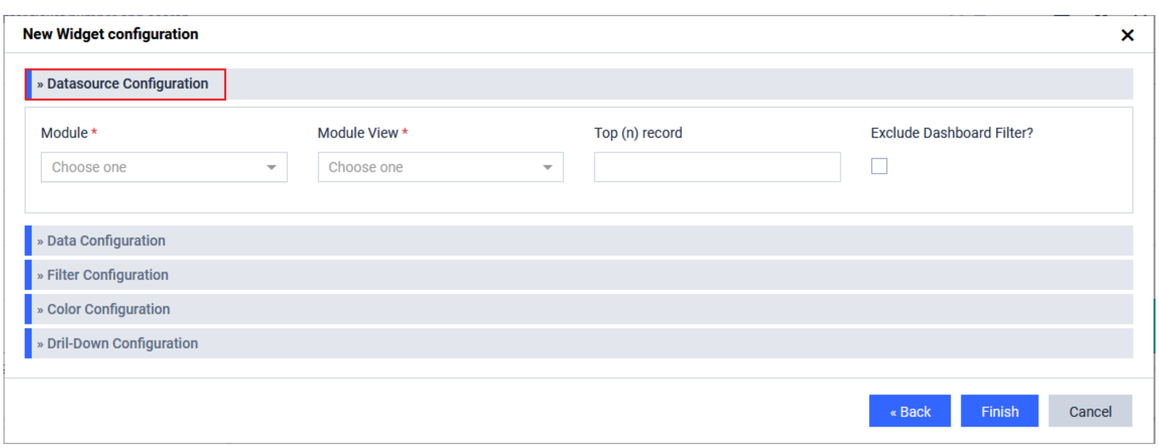
4. Upon clicking on **add new widget**, widget will be appear at the bottom of the page
5. Click on **Configure**, Displays a widget List
6. Select required widget to configure the chart

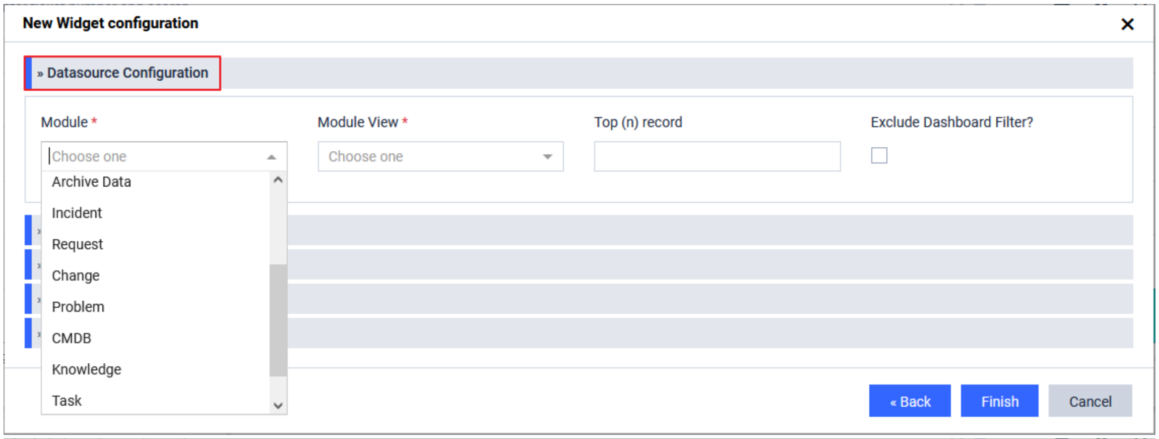


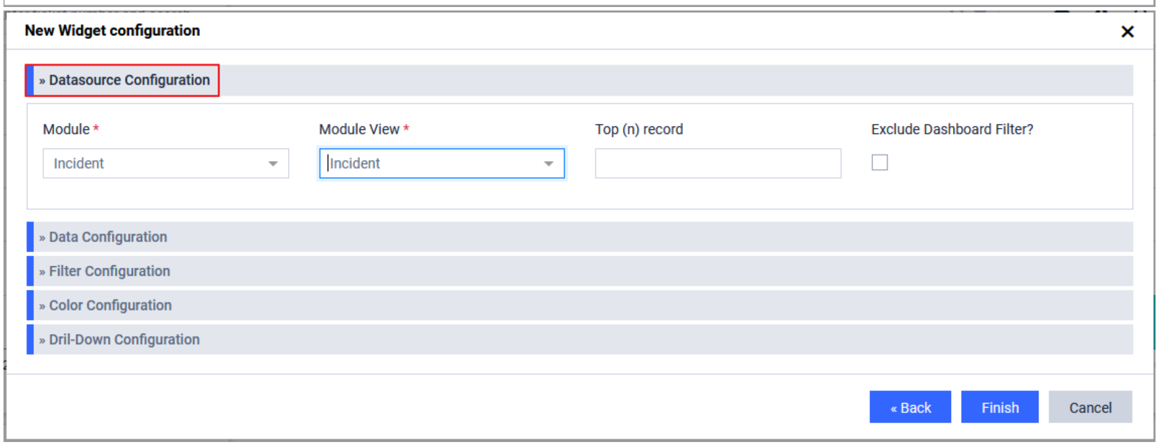

Select Widget
Card
Table
Funnel Chart
Column Chart
Pie Chart
Area Chart
Bar Chart
Gauge Chart
Donut Chart
Line Chart
Waterfall Chart
Radar Chart
Next »
Cancel



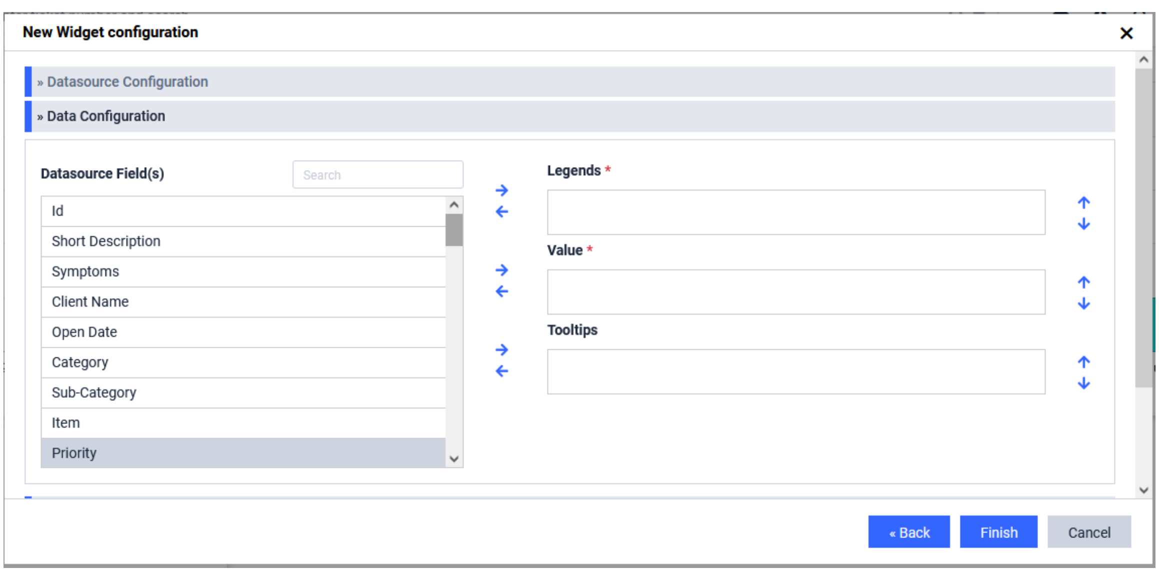
7. Click Proceed to Next >> button. This opens the Data Configuration Page.
8. In Data source Configuration, Choose the module (Incident, Request, Problem, Change and so on) for which you wish to create the widget.



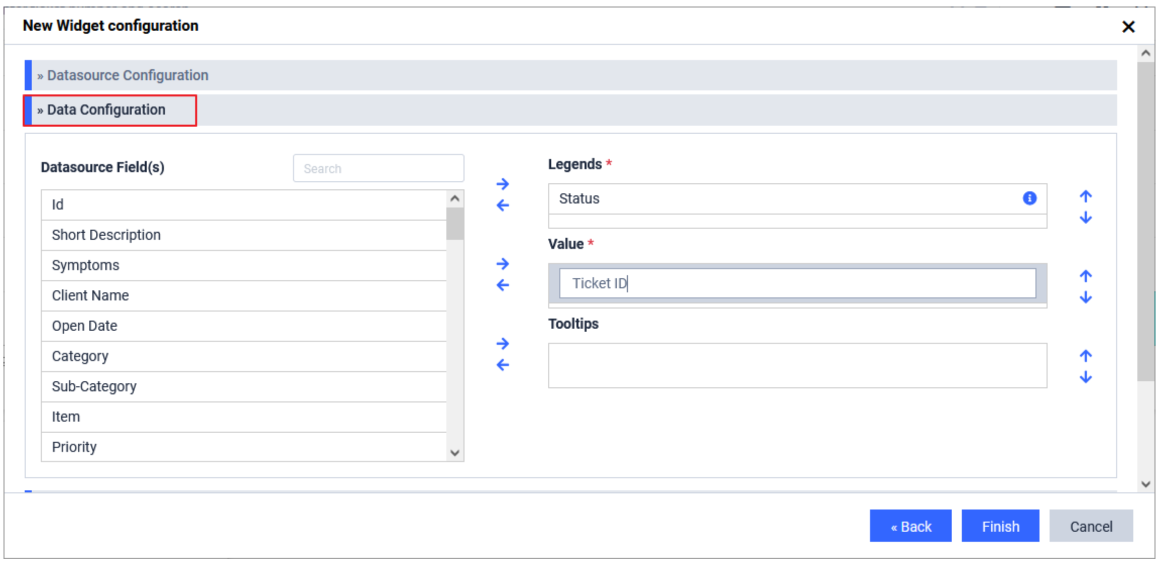




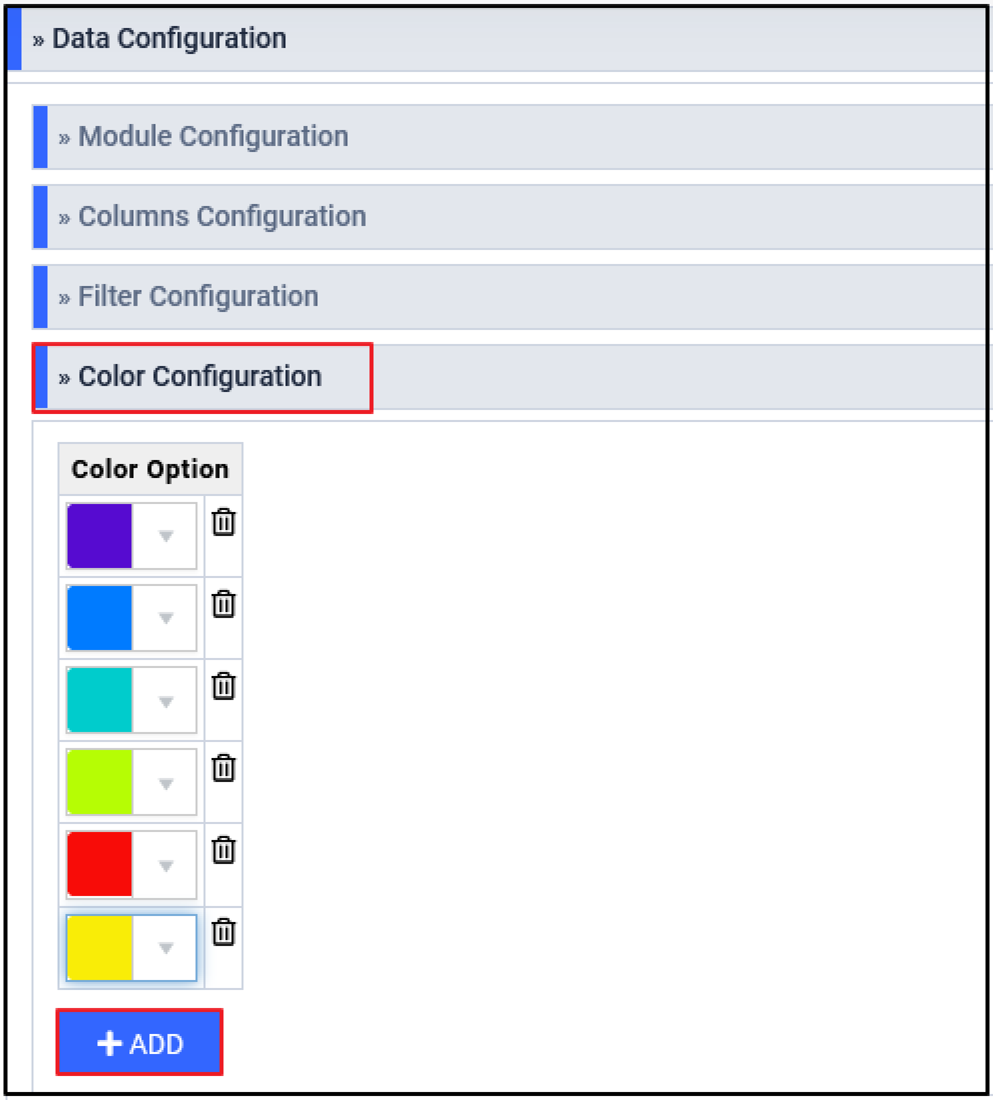
9. Next navigate to Data Configuration page. This page differs for each widget type. Each widget type has to go through various steps generate a widget.

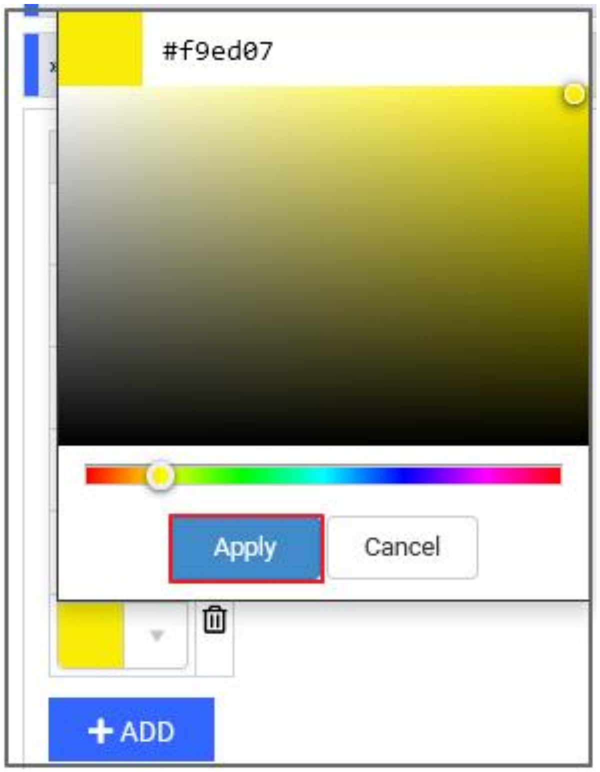


10. Select the columns from the Data source field list box and click button to move them to Legends, Value and tool tips. Click the button if you want to remove any column from the Legends, Value and tool tips.
11. There are action available at column field level to **Rename**, **Remove**, **Sort**, **and format** and get a **Row count** or **distinct count**.

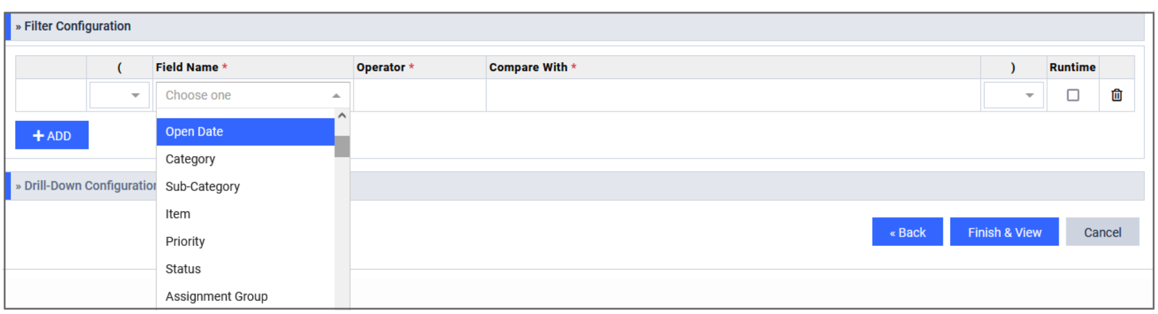


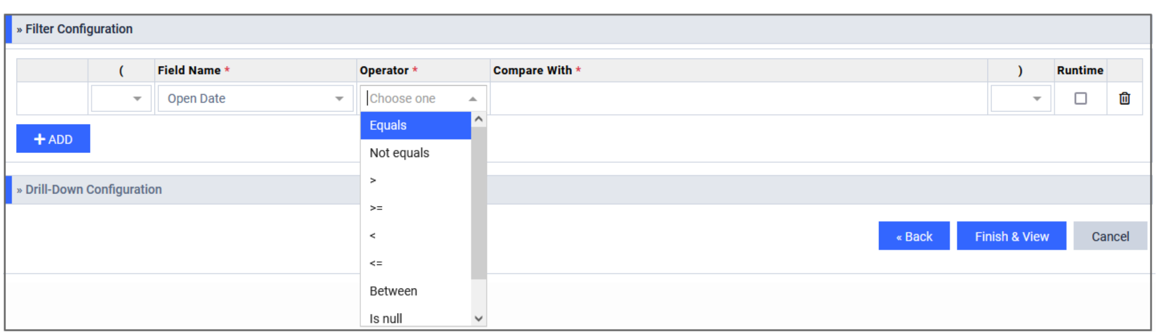
12. Tool facilitates to configure color configuration for charts. Navigate to color configuration wizard and click on Add to additional colors.

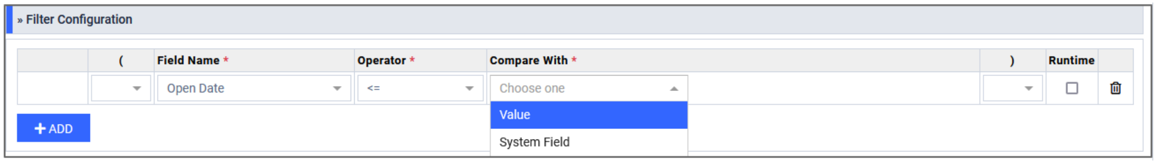

» Data Configuration
» Module Configuration
» Columns Configuration
» Filter Configuration
» Color Configuration
Color Option
+ ADD

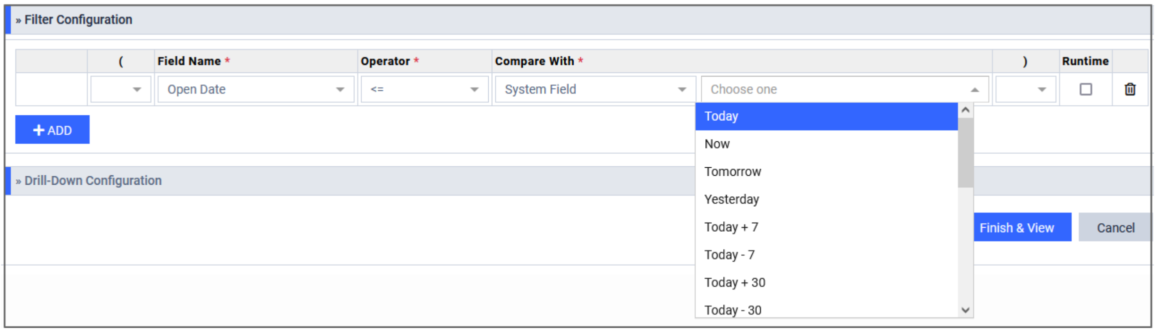


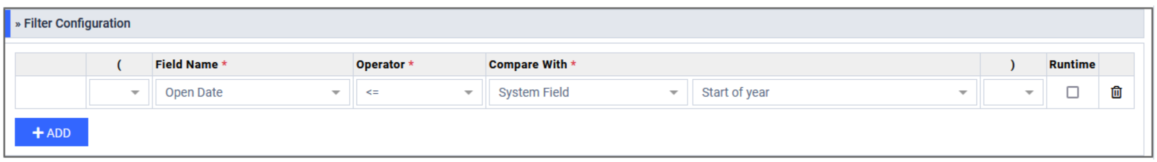
14. Next move to **Filter Configuration,** click on **Add** to add condition. If you are using the date/time filter criteria, select the date column name from the field name drop down list.



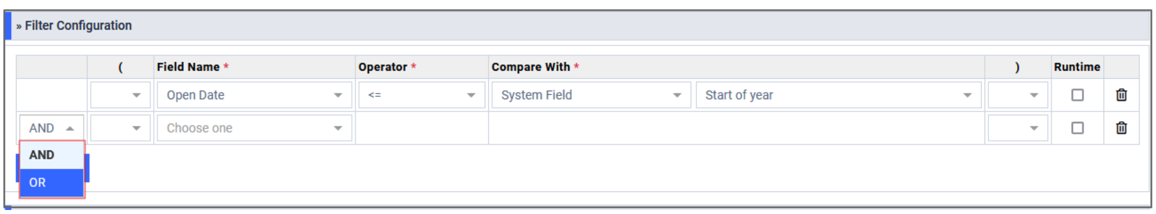




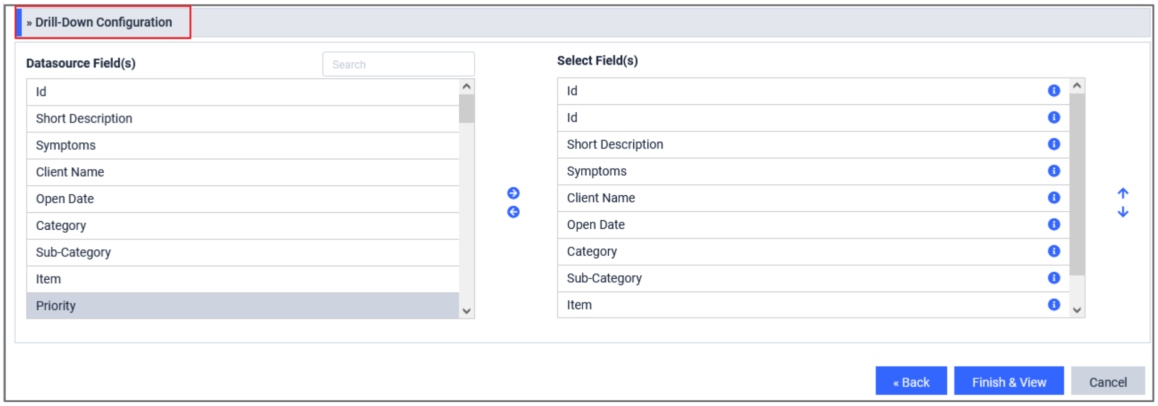




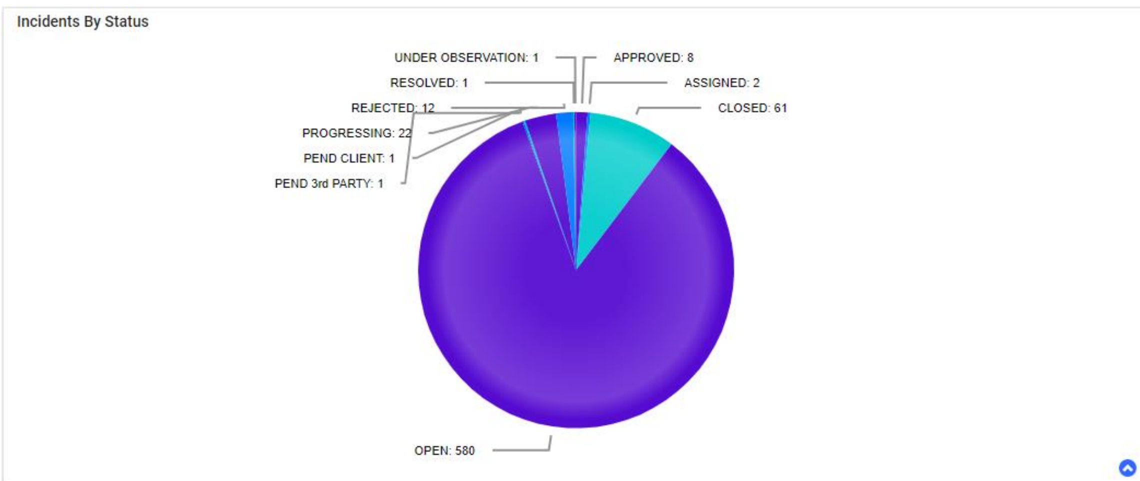
AND or **OR** option allows to add more than one criteria. You can delete a criteria by clicking the delete icon.



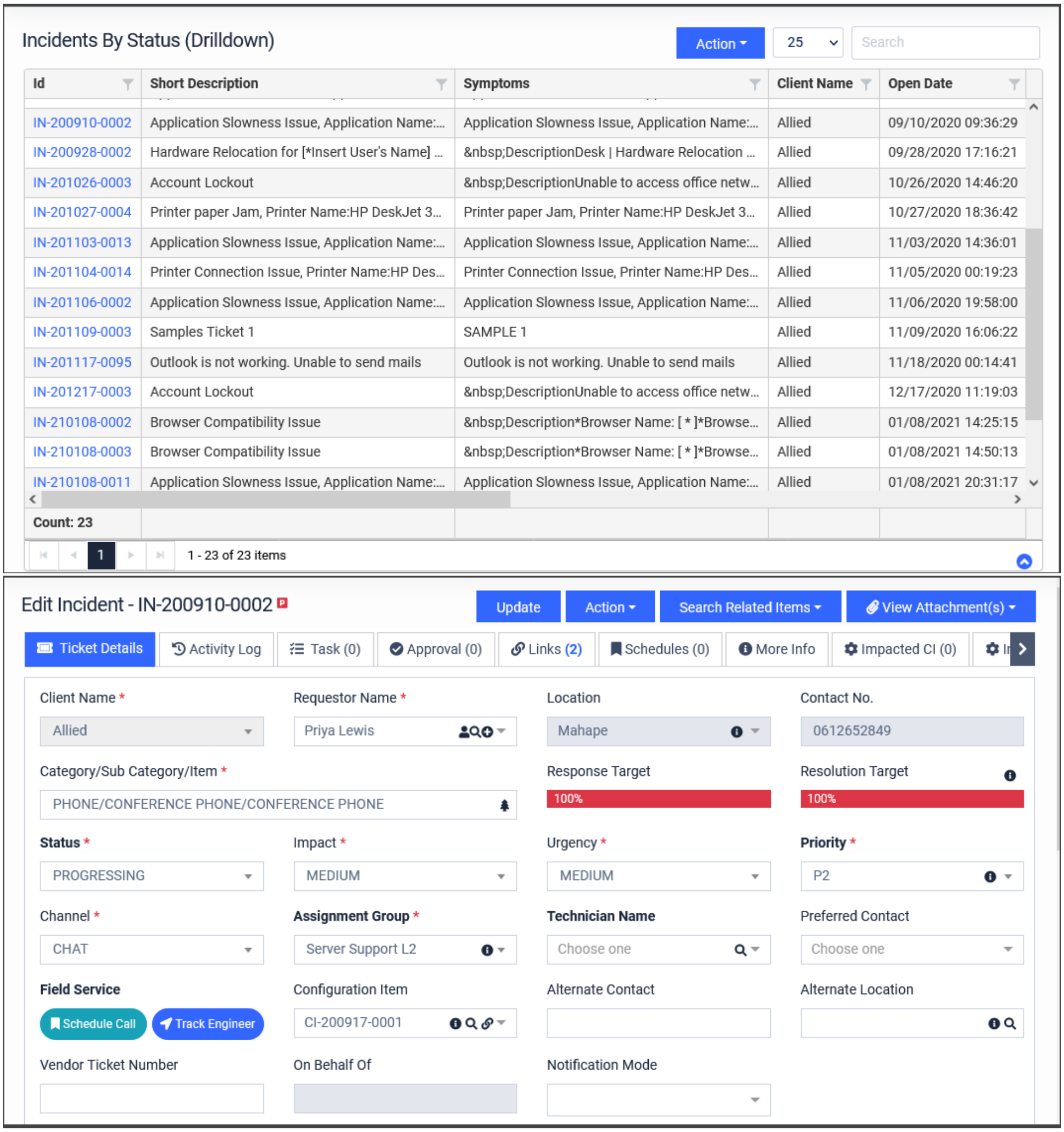
15. Drill down Configuration allows user to have drill down report with required fields. Select the columns from the Data source field list box and click button  to move them to Columns list box. Click the  button if you want to remove any column from the Columns list box.



Finally click on **Finish & View** to view the report.



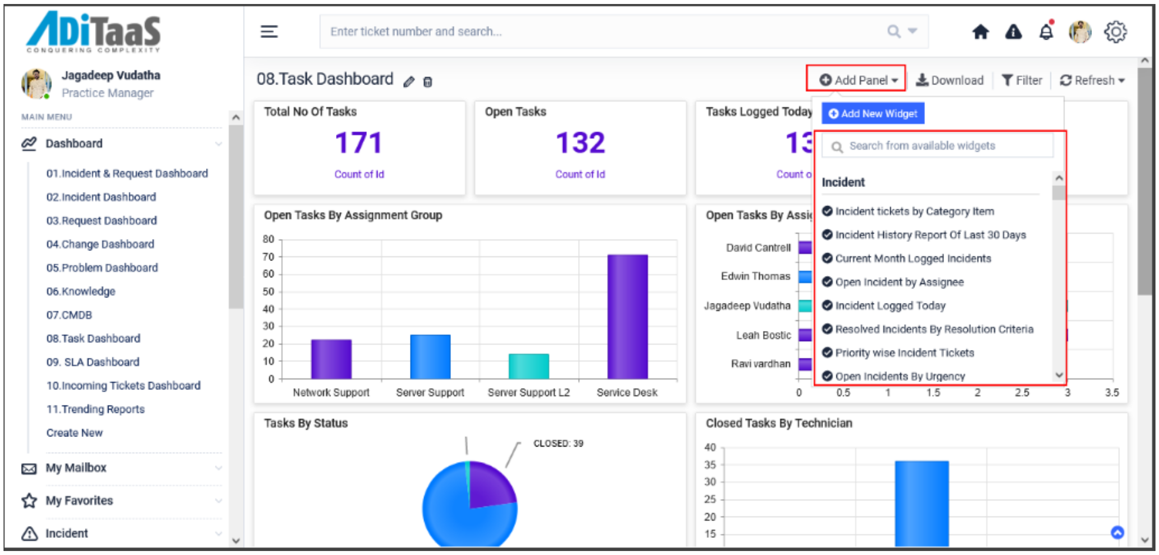
Drill down option is enabled in all graphical reports. Clicking on graph, page will display drill down report and clicking on specific ticket will take to the next level to view the real ticket data.

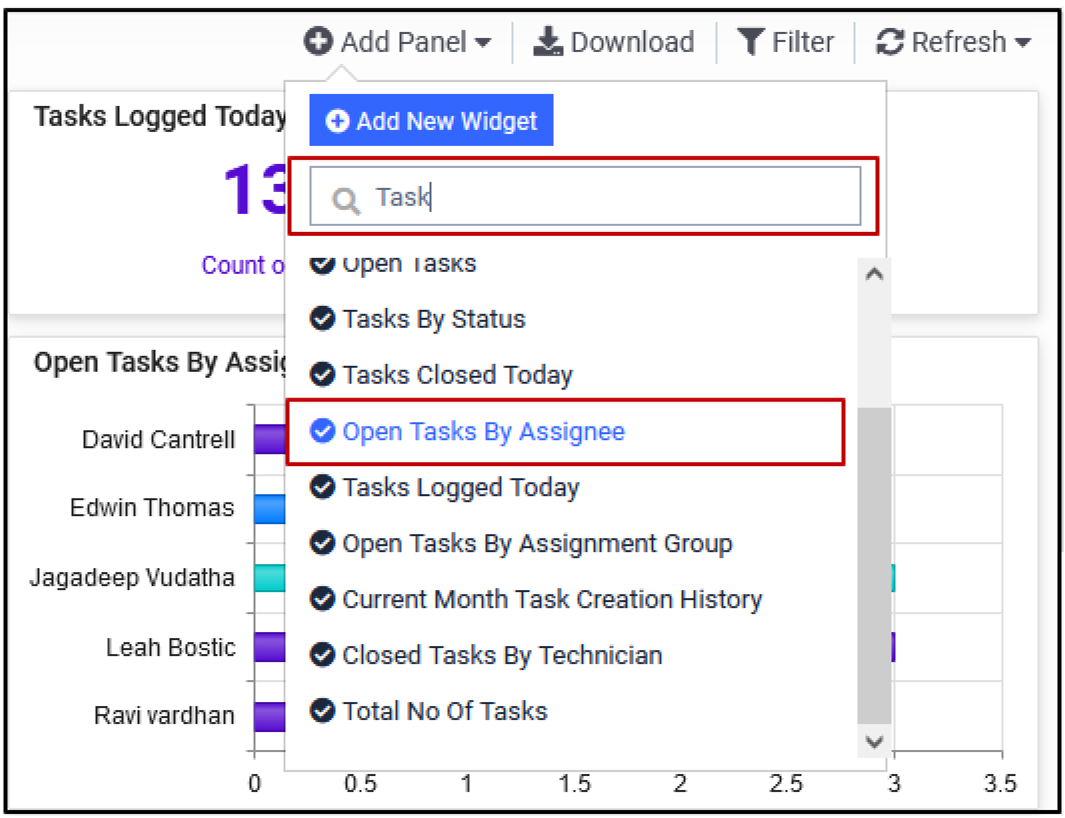


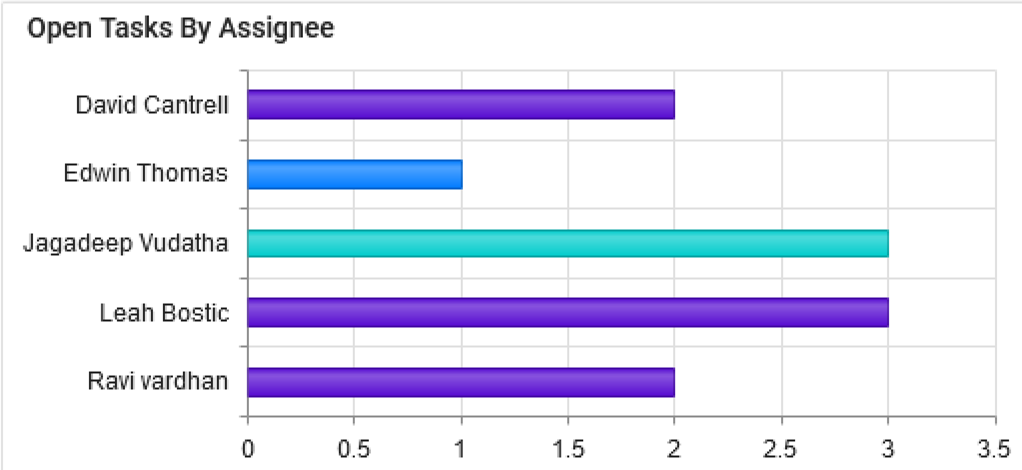
ADD EXISTING WIDGET TO DASHBOARD

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

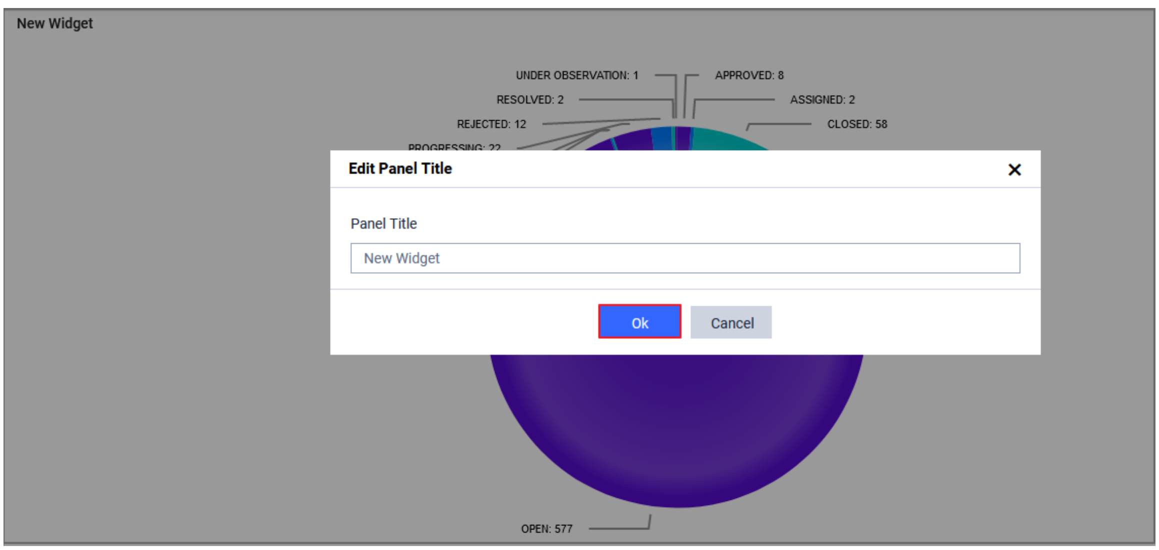

ADiTaaS
Jagadeep Vudatha
Practice Manager
MAIN MENU
Dashboard
01.Incident & Request Dashboard
02.Incident Dashboard
03.Request Dashboard
04.Change Dashboard
05.Problem Dashboard
06.Knowledge
07.CMDB
08.Task Dashboard
09. SLA Dashboard
10.Incoming Tickets Dashboard
11.Trending Reports
Create New
My Mailbox
My Favorites
Incident
Enter ticket number and search...
08.Task Dashboard
Add Panel
Download
Filter
Refresh
Total No Of Tasks
171
Count of Id
Open Tasks
132
Count of Id
Tasks Logged Today
Add New Widget
Search from available widgets
Incident
Incident tickets by Category Item
Incident History Report Of Last 30 Days
Current Month Logged Incidents
Open Incident by Assignee
Incident Logged Today
Resolved Incidents By Resolution Criteria
Priority wise Incident Tickets
Open Incidents By Urgency
Open Tasks By Assignment Group
Network Support
Server Support
Server Support L2
Service Desk
David Cantrell
Edwin Thomas
Jagadeep Vudatha
Leah Bostic
Ravi vardhan
Tasks By Status
CLOSED: 39
Closed Tasks By Technician

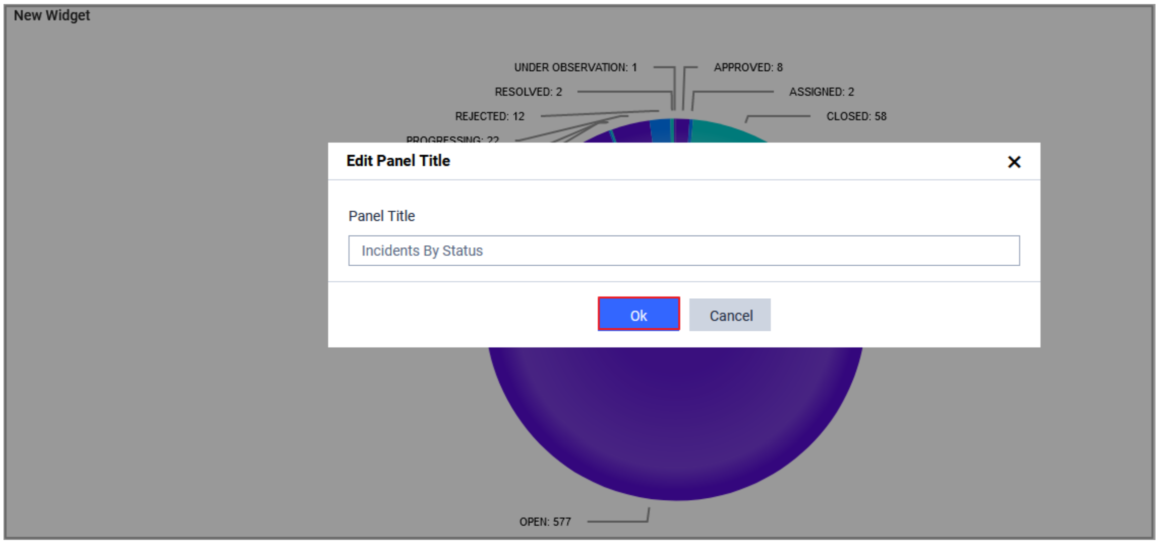

Add Panel
Download
Filter
Refresh
Tasks Logged Today
Add New Widget
Task
Tasks By Status
Tasks Closed Today
Open Tasks By Assignee
Tasks Logged Today
Open Tasks By Assignment Group
Current Month Task Creation History
Closed Tasks By Technician
Total No Of Tasks
David Cantrell
Edwin Thomas
Jagadeep Vudatha
Leah Bostic
Ravi vardhan
0
0.5
1
1.5
2
2.5
3
3.5

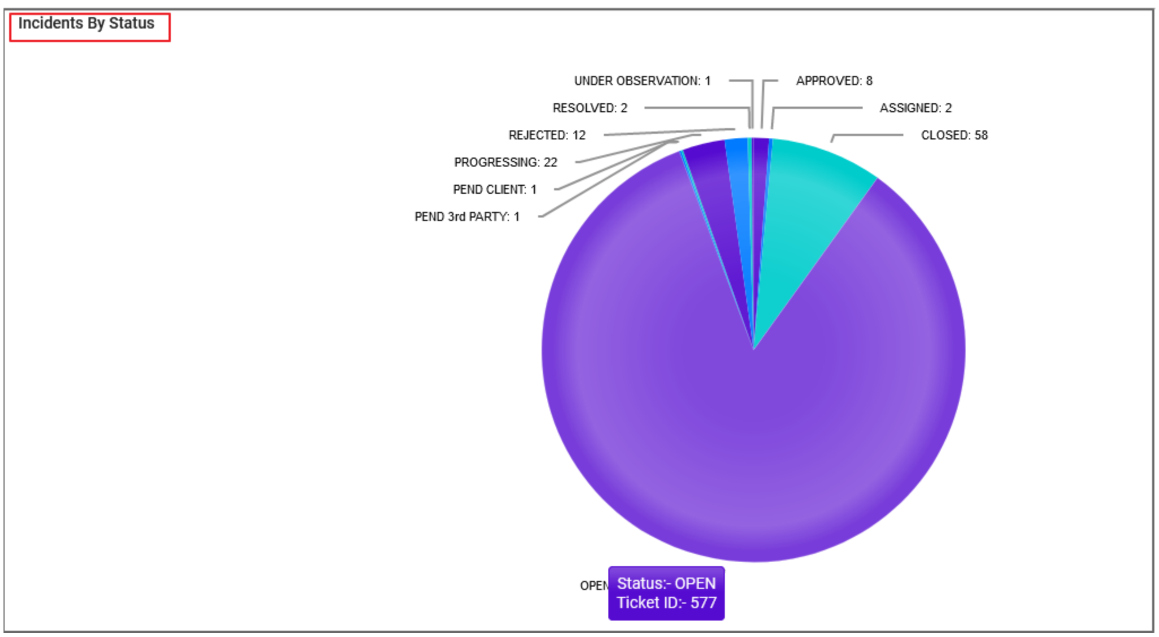


RENAME WIDGET

To rename the widget double click on widget. Enter relevant name to the widget and click on ok.

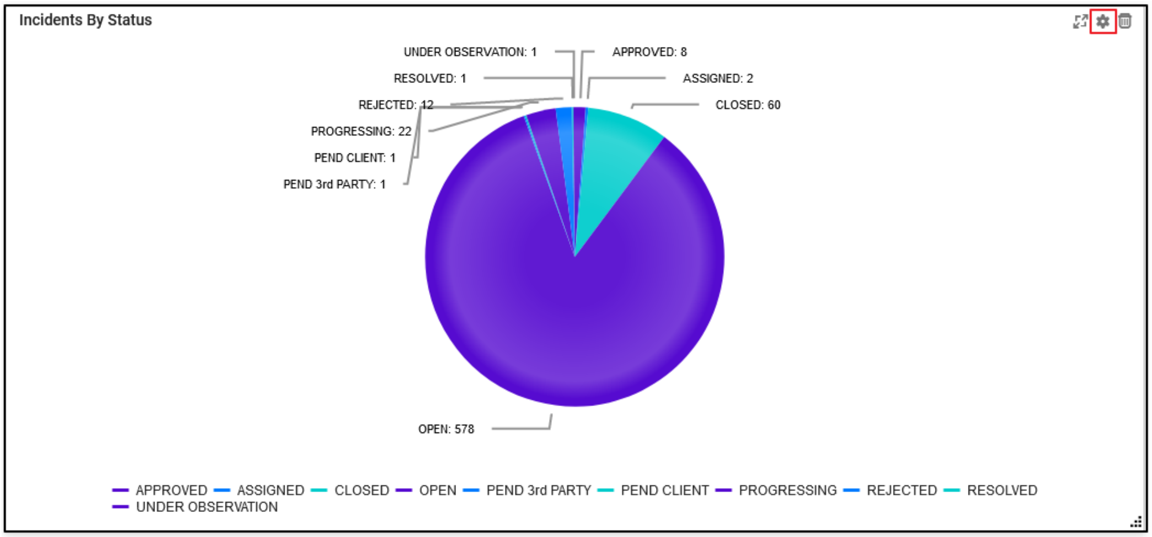






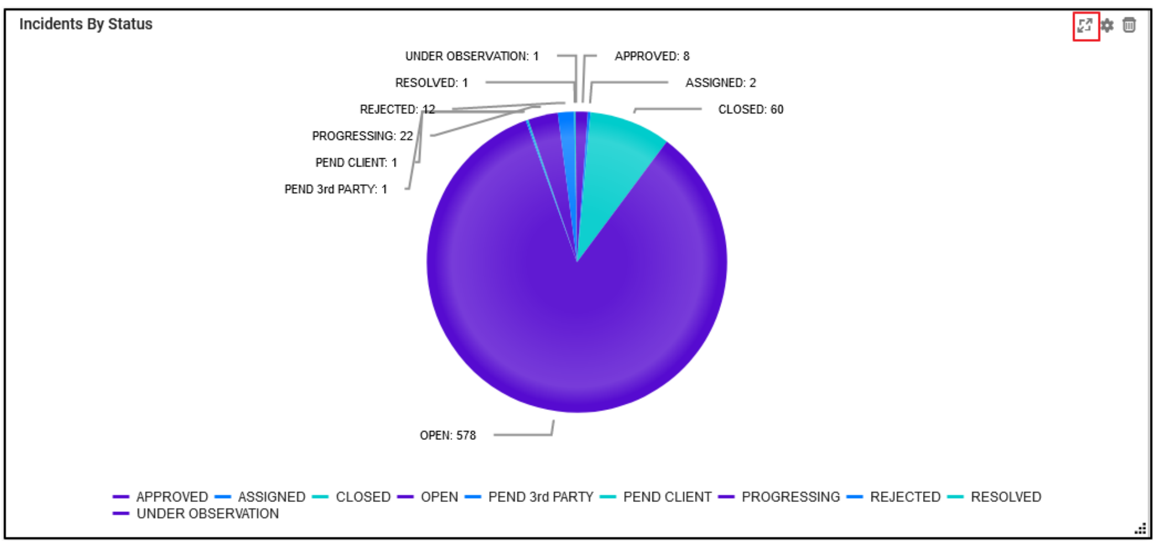
EDIT WIDGET

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.

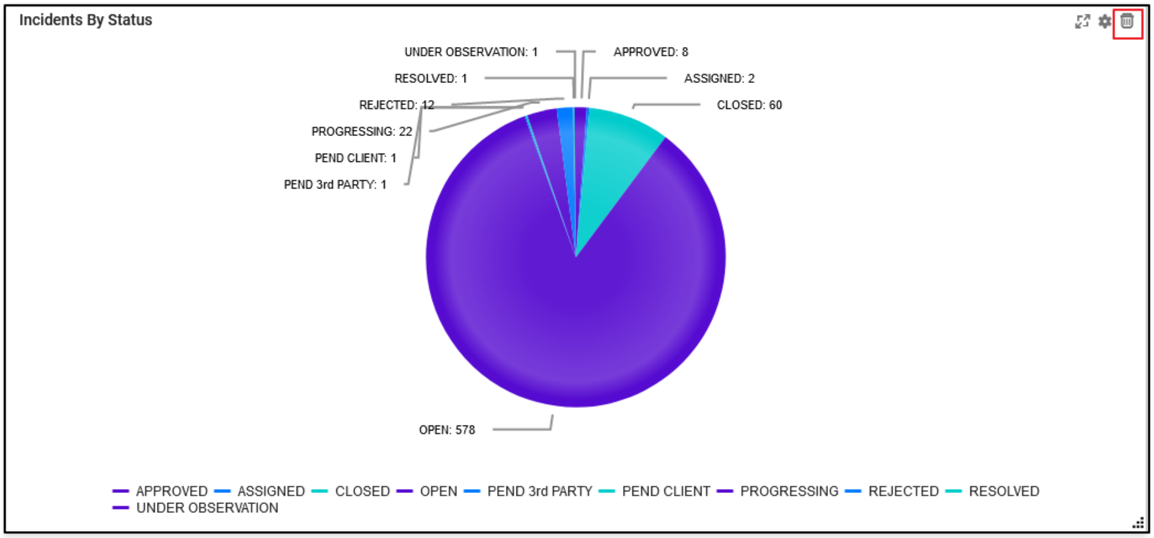


DRAG AND DROP WIDGET

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.

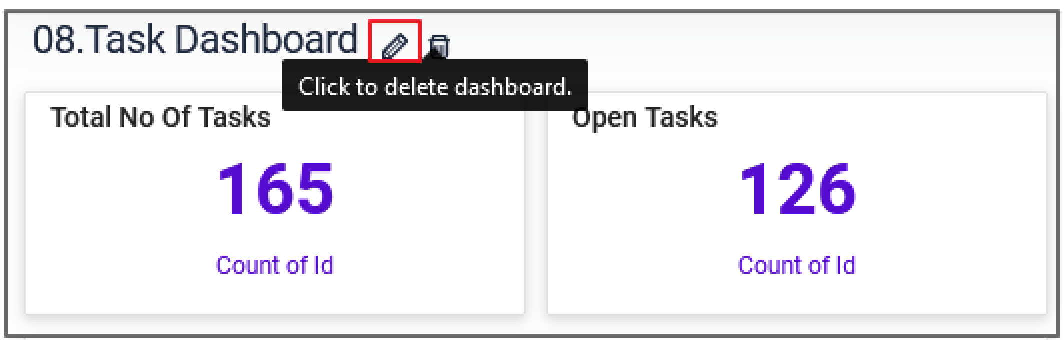
DELETE WIDGET

Click on delete icon to delete the widget



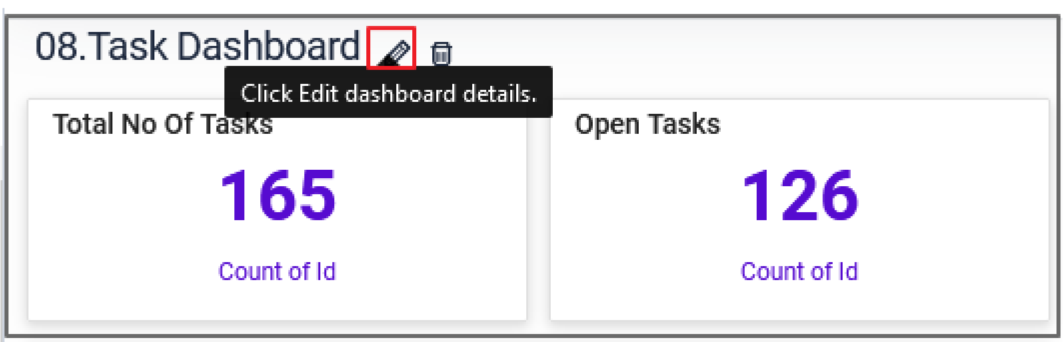
DELETE DASHBOARD

Click on delete button placed next to dashboard title. Displays a confirmation message. Click on Yes to delete the dashboard.



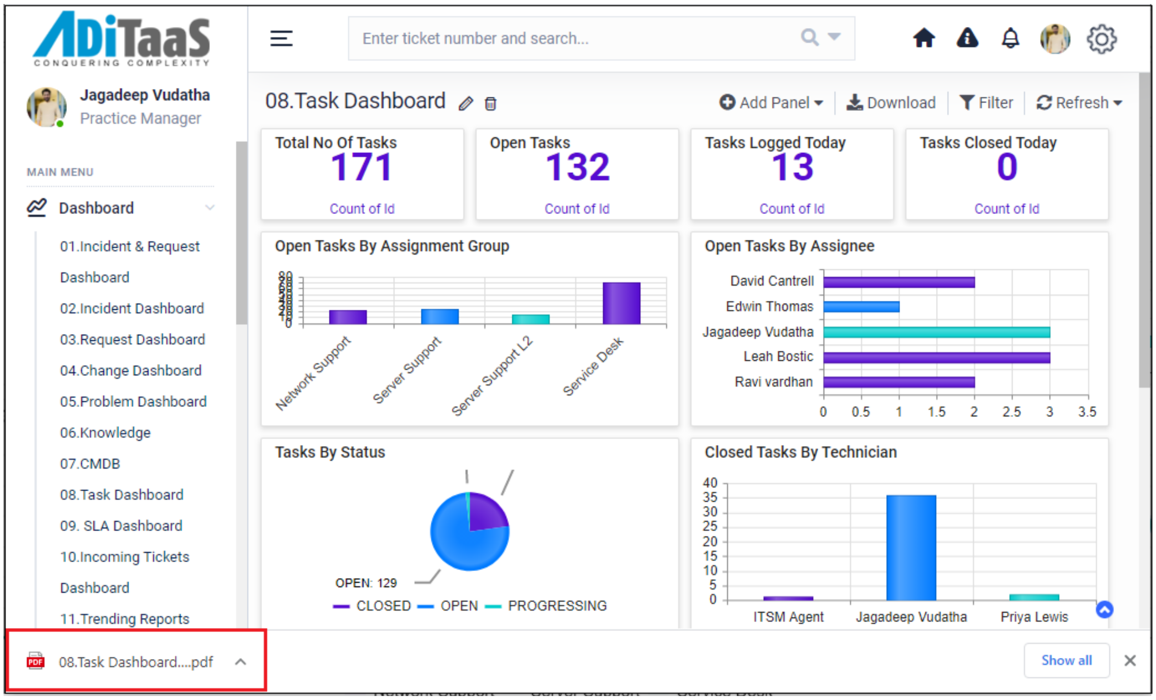
RENAME DASHBOARD

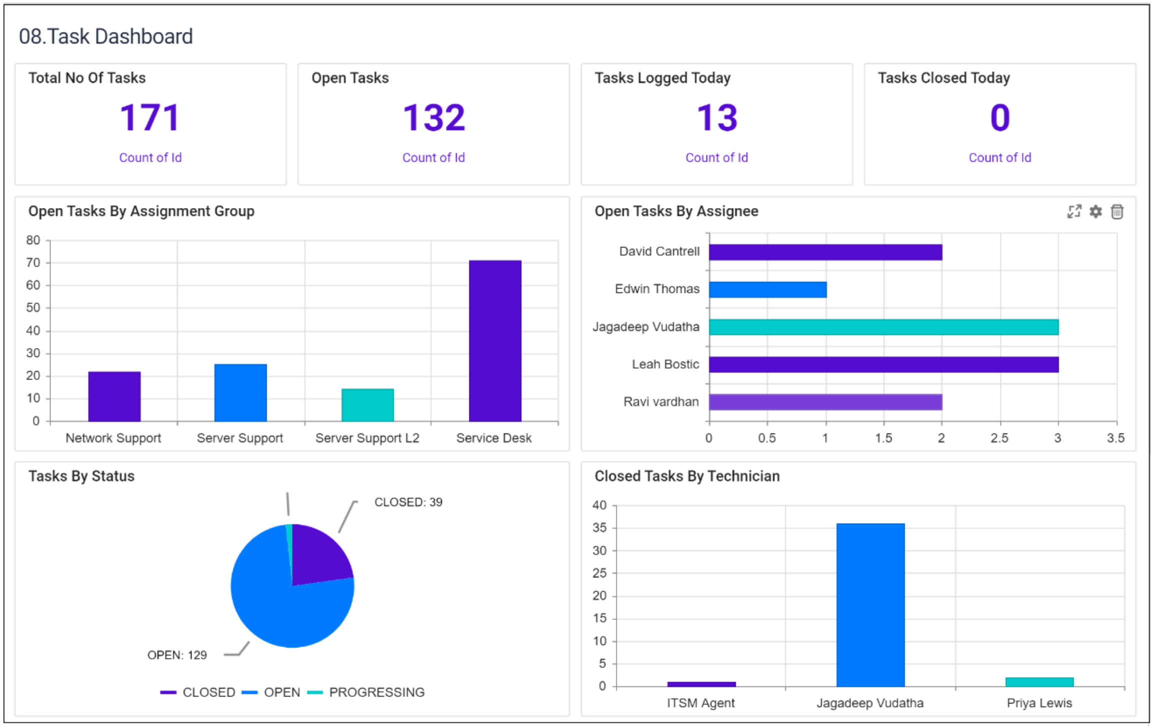
Click on edit button placed next to dashboard title. Provide the relevant name in text field and click on ok.



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.