

# HP Service Manager

Software Version: 9.41

For the supported Windows® and UNIX® operating systems

## Service Desk help topics for printing

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Software Release Date: September 2015



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## About this PDF Version of Online Help

This document is a PDF version of the online help. This PDF file is provided so you can easily print multiple topics from the help information or read the online help in PDF format. Because this content was originally created to be viewed as online help in a web browser, some topics may not be formatted properly. Some interactive topics may not

be present in this PDF version. Those topics can be successfully printed from within the online help.

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# Service Desk user roles

The Service Desk module has the following user roles:

- ["Service Desk User" below](#)
- ["Service Desk Agent" on the next page](#)

## Service Desk User

The Service Desk User user role has the following responsibilities:

- Report all IT-related requests to the service desk or use the self-service web pages
- Validate solutions and answers that are provided by the IT department to a registered service request

To execute this role, the following tasks are available to the Service Desk User:

**Note:** For an overview of how these tasks fit in the incident management workflow, see ["Service Desk workflows and user tasks" on page 9](#)

ITIL Workflows	User Tasks
<a href="#">"Self-Service user interactions (S00.1)" on page 11</a>	<ul style="list-style-type: none"><li>• <a href="#">"Request a service catalog item or bundle" on page 12</a></li><li>• <a href="#">"Create a self-service request" on page 13</a></li><li>• <a href="#">"Close a self-service request" on page 14</a></li><li>• <a href="#">"Resubmit a self-service request" on page 14</a></li><li>• <a href="#">"Update a self-service request" on page 15</a></li><li>• <a href="#">"View a self-service request" on page 15</a></li></ul>
<a href="#">"User interaction handling (S00.2)" on page 16</a>	<ul style="list-style-type: none"><li>• None</li></ul>
<a href="#">"Interaction closure (S00.4)" on page 27</a>	<ul style="list-style-type: none"><li>• None</li></ul>

## Service Desk Agent

The Service Desk Agent user role has the following responsibilities:

- Open interactions based on contact with the user
- Match user interaction to incidents, problems, known errors, or knowledge documents
- Solve and close interactions
- Provide status updates to users on request
- Register incidents based on user interactions and assign them to the correct support group
- Register requests for change, based on user interactions
- Register service requests, based on a user interactions
- Validate solutions provided by support groups
- Report and verify solution to users
- Monitor the Service Level Agreement (SLA) targets of all registered incidents and escalate the incidents if required
- Communicate service outages to all users

To execute this role, the following tasks are available to the Service Desk Agent:

**Note:** For an overview of how these tasks fit in the incident management workflow, see ["Service Desk workflows and user tasks" on page 9](#)

ITIL Workflows	User Tasks
<a href="#">"Self-Service user interactions (S00.1)" on page 11</a>	<ul style="list-style-type: none"><li>• None</li></ul>
<a href="#">"User interaction handling (S00.2)" on page 16</a>	<ul style="list-style-type: none"><li>• <a href="#">"Register a complaint" on page 16</a></li><li>• <a href="#">"Register a request for change" on page 18</a></li><li>• <a href="#">"Register a service catalog request" on page 19</a></li></ul>

	<ul style="list-style-type: none"><li>• "Register an incident" on page 21</li><li>• "Register a request for information" on page 23</li><li>• "Update an interaction record" on page 24</li><li>• "Cancel a new Service Desk interaction" on page 25</li><li>• "Reopen an incident" on page 25</li></ul>
"Interaction closure (S00.4)" on page 27	<ul style="list-style-type: none"><li>• "Close a first time resolved Service Desk interaction" on page 27</li><li>• "Close an existing Service Desk interaction" on page 28</li></ul>

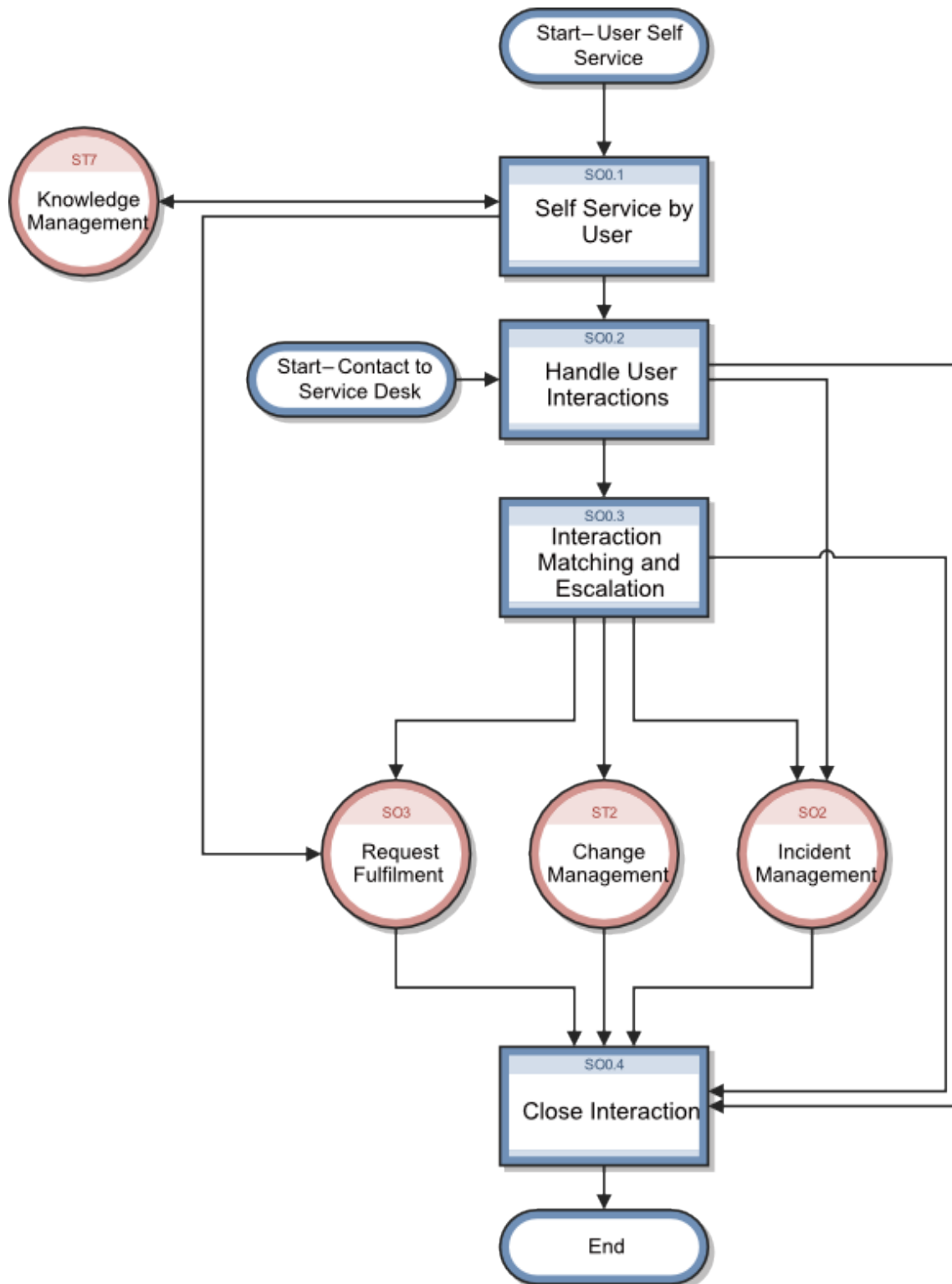


## Service Desk workflows and user tasks

Every user contact with the Service Desk is logged in an interaction record. User Interaction Management is the process for handling all interactions with the service desk that are received from self-service webpages or directly by service desk personnel.

This process streamlines service desk activities, thereby decreasing the workload for second line support teams.

### User Interaction Management workflow



The User Interaction Management process consists of the following workflows and tasks:

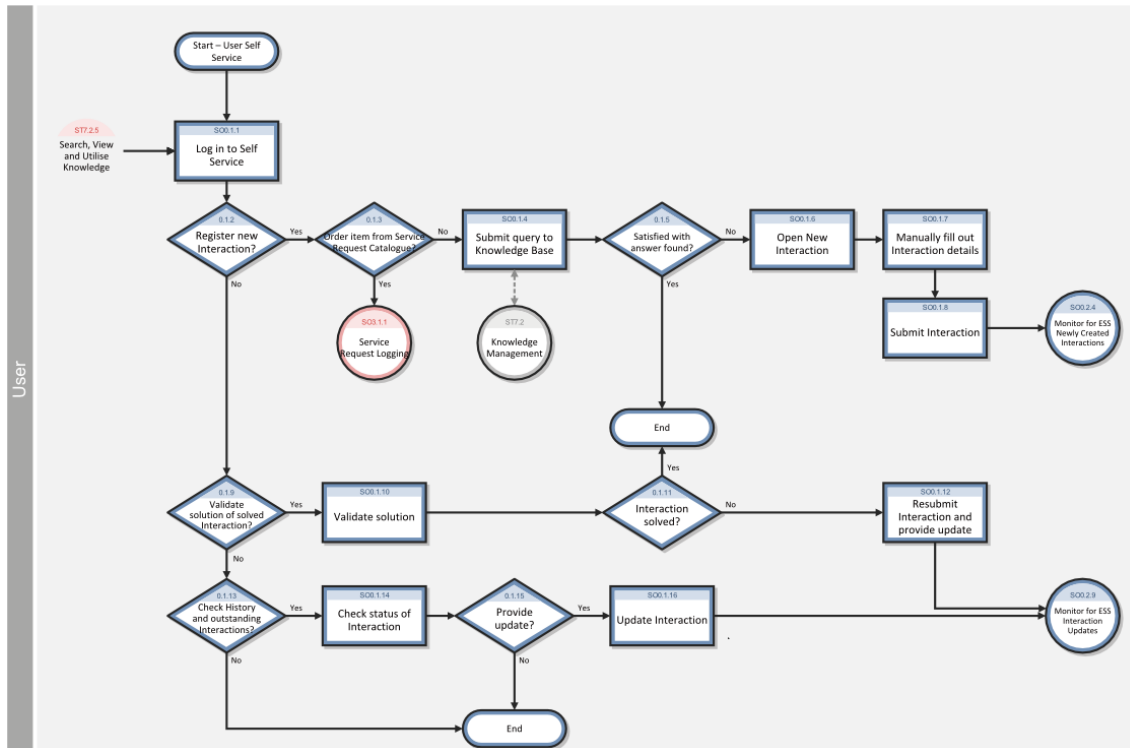
ITIL Workflow	Tasks
"Self-Service user interactions (S00.1)" below	<ul style="list-style-type: none"> <li>• "Request a service catalog item or bundle" on the next page</li> <li>• "Create a self-service request" on page 13</li> <li>• "Close a self-service request" on page 14</li> <li>• "Resubmit a self-service request" on page 14</li> <li>• "Update a self-service request" on page 15</li> <li>• "View a self-service request" on page 15</li> </ul>
"User interaction handling (S00.2)" on page 16	<ul style="list-style-type: none"> <li>• "Register a complaint" on page 16</li> <li>• "Register a request for change" on page 18</li> <li>• "Register a service catalog request" on page 19</li> <li>• "Register an incident" on page 21</li> <li>• "Register a request for information" on page 23</li> <li>• "Update an interaction record" on page 24</li> <li>• "Cancel a new Service Desk interaction" on page 25</li> <li>• "Reopen an incident" on page 25</li> </ul>
"Interaction matching and escalation (S00.3)" on page 26	
"Interaction closure (S00.4)" on page 27	<ul style="list-style-type: none"> <li>• "Close a first time resolved Service Desk interaction" on page 27</li> <li>• "Close an existing Service Desk interaction" on page 28</li> </ul>

To view more workflow diagrams and other information about this process, refer to the HP Service Manager Processes and Best Practices Guide that is linked to in the related topics.

## Self-Service user interactions (S00.1)

By using the self-service web environment, users can perform the following activities without contacting the Service Desk:

- Search the Knowledge Base to find an answer to a question or issue
- Monitor the status of previously reported interactions
- Log new interactions
- Order items from the service catalog



## Request a service catalog item or bundle

### Applies to User Roles:

User

You can easily order products and services from Service Catalog without needing to contact the service desk. Items in the Service Catalog can include an item picture, description, attachments, and purchasing options. Some items in the Service Catalog are for information only, such as instructions on how to order items from an outside service. Information-only items only have an item picture, description, and attachments; they do not include purchasing options.

**Note:** You may also order one or more products and related service tasks by choosing a bundle.

To request an item or bundle from the Service Catalog, follow these steps:

1. Click **Order from Catalog**.
2. Select a category, and then click **Search** to view available products and services.
3. Click the item you want to request to view the Order Information for that item.

**Note:** Some catalog items may be Information-only. You will not be able to add Information-only items to your cart.

4. In the Requested for field, select the Individual who will receive the good or service.
5. Select the quantity and any other item options, and then click **Add to Cart** to add the item you want to your cart.
6. From the Order from Catalog home page, click **View Cart/Checkout**.
7. Click **Submit Request**.
8. Type any required information justifying the request.
9. Click **Submit**.

## Create a self-service request

### Applies to User Roles:

User

If you cannot find an existing solution to your incident or problem in the knowledge base, you can create a self-service request for a Service Desk Agent to resolve.

To create a self-service request, follow these steps:

1. Click **Submit a Request**.
2. In the Submit a Request window, verify the **Service Recipient** and **Primary Contact** fields.
3. Select your notification preferences in the **Notify By** field.
4. Select the **Urgency** of your issue.
5. Type a title and a description for your issue.

6. Click **Add Files**, and then follow these steps to add any relevant attachments:
  - Click **Browse** to locate your attachment.
  - Select the file to add.
  - Click **OK**.
7. Click **Submit**.

## Close a self-service request

### Applies to User Roles:

User

You can close a self-service request if you are no longer experiencing the problem or if you have another reason for closing the request. If you need to resubmit the request, you can do so from your list of closed self-service requests.

To close a self-service request, follow these steps:

1. Click **View Open Requests**. Service Desk displays a table of your open requests and the status of each request.
2. Select the Service Desk interaction record that you want to close.
3. Click **Update**, type an update description if necessary, and then click **Close Request**.
4. Select a reason to close the request, and then click **Submit**. The Service Desk interaction record is closed.

## Resubmit a self-service request

### Applies to User Roles:

User

If you disagree with a proposed solution to a closed request, you can resubmit the request and provide a reason why the resolution is unsatisfactory. When you resubmit a closed interaction record, HP Service Manager assigns you a new interaction identification number to track the request. Service Manager automatically links the newly-created request to your closed interaction record and sends the new request to a Service Desk Agent for further diagnosis.

To resubmit a self-service request, follow these steps:

1. Click **View Closed Requests**.
2. Select the Service Desk interaction record that you want to resubmit.
3. Click **Resubmit**. Service Desk creates a new interaction record with a different identification number. However, the new record displays the same field information as the original Service Desk interaction record.
4. Type the reason why you are resubmitting the request.
5. Click **Save & Exit**.

## Update a self-service request

### Applies to User Roles:

User

You can update any of your open self-service requests with additional information to assist the Service Desk Agent.

To update a self-service request, follow these steps:

1. Click **View Open Requests** to display a table of your open requests and the status of each request.
2. Select the Service Desk interaction record that you want to update.
3. Click **Update**, and then enter any new request details, additional descriptions, or add relevant attachments as needed.
4. Click **Save & Exit**.

## View a self-service request

### Applies to User Roles:

User

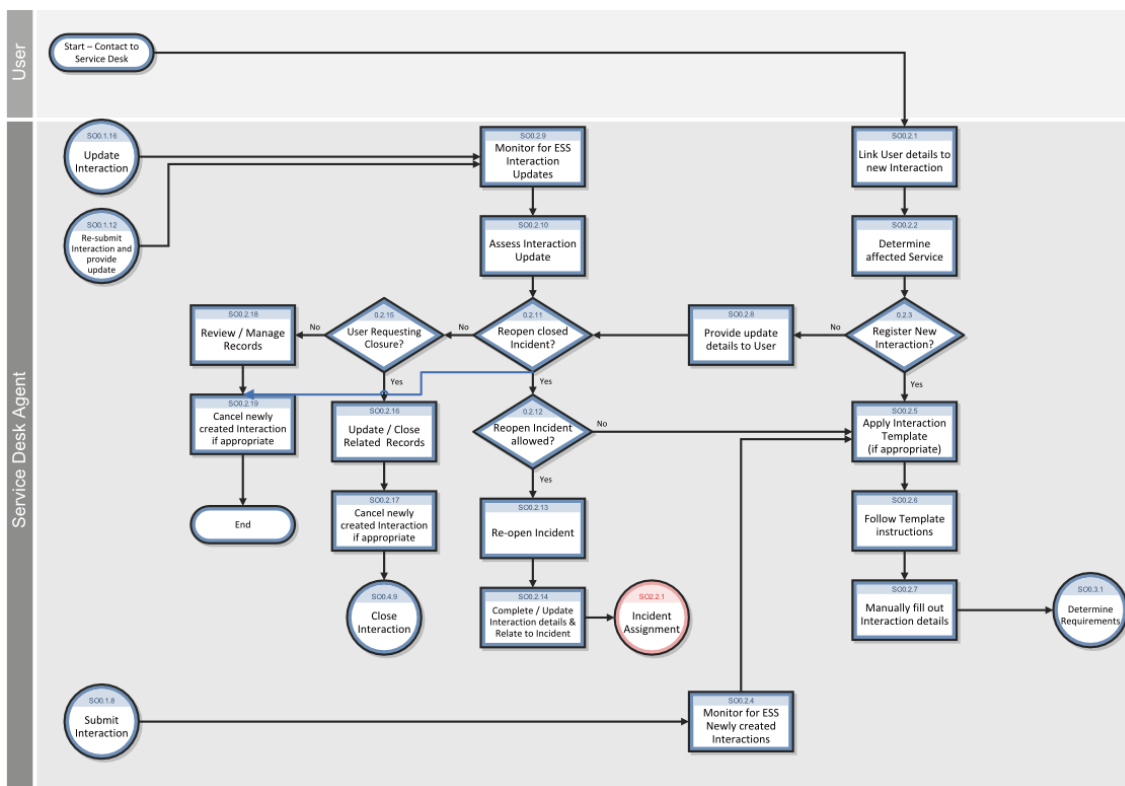
You can view your service requests to view the status of any outstanding interactions or to view a list of all your past requests.

To view a self-service request, follow these steps:

1. Click **View Open Requests** or **View Closed Requests** to display a table of requests and the status of each request.
2. Select the Service Desk interaction record that you want to view.
3. Click **Back** to return to the list of service requests.

## User interaction handling (S00.2)

The Service Desk is responsible for handling all user interactions that are received by the self-service web portal, email or phone. The Service Desk attempts to resolve an interaction on first contact when the user makes first contact with the Service Desk.



## Register a complaint

**Applies to User Roles:**

Service Desk Agent



If a user contacts you regarding a service complaint or a concern with the performance of a configuration item (CI), you can create a Service Desk interaction to collect information about the user's service request. Categorize the service request as a complaint, and then solve or escalate the request.

To register a complaint, follow these steps:

1. Click **Service Desk > Create New Interaction**. HP Service Manager opens a blank New Interaction form and assigns the issue a unique interaction ID.
2. Select the contact for the interaction. The associated fields fill automatically.

**Note:** If you use the Fill function to replace the information in a field that already has data, clear the field before you click **Fill**. If the field contains data, the Fill function cannot operate.

3. In the **Notify By** field, select the user's preferred notification method.
4. In the **Service Recipient** field, select the service recipient. The associated field fills automatically.
5. In the **Affected Service** field, select the affected service.
6. In the **Affected CI** field, select the affected CI.

**Note:**

- The **Default Impact** and **Priority** values of the affected CI are automatically populated to the **Impact** and **Urgency** fields of the interaction record. You can manually change these auto-populated values if needed.
- If you specify the **Impact** and **Urgency** values first and then specify an affected CI with an empty **Default Impact** or **Priority** value, the **Impact** or **Urgency** value that you selected for the interaction record is cleared.

7. Type a title and description for the interaction.
8. Select "complaint" as the category, and then select the area and subarea.
9. Determine if there is a known solution or workaround for the user's issue. To do this, follow these steps:

- a. Search the available knowledge bases.

**Note:** When you use the Search Knowledge option from the New Interaction form, Service Manager uses the interaction description text as the search query.

- b. If you find an existing solution or workaround in the knowledge bases, close the interaction by using the solution.
  - c. If you are unable to solve the user's issue, search for a problem or known error.
  - d. If you find a workaround in the problem or known error records, close the interaction by using the workaround.
10. If you are still unable to solve the issue, select the impact and urgency of the request, and then click **Escalate**. Service Manager creates both an interaction and an incident, and then associates the interaction to the incident.

## Register a request for change

### Applies to User Roles:

Service Desk Agent

If a user contacts you to request a change to a service or configuration item (CI), you can create a Service Desk interaction record to collect information about the service request. Categorize the service request as a request for change, and then solve or escalate the request.

To register a request for change, follow these steps:

1. Click **Service Desk > Create New Interaction**. HP Service Manager opens a blank New Interaction form and assigns the issue a unique interaction ID.
2. Select the contact for the interaction. The associated fields fill automatically.

**Note:** If you use the Fill function to replace the information in a field that already contains data, clear the field before you click Fill. If the field contains data, the Fill function does not work.

3. Select the user's preferred notification method.

4. Select the service recipient. The associated field fills automatically.
5. Select the affected service.
6. Select the affected CI.

**Note:**

- The **Default Impact** and **Priority** values of the affected CI are automatically populated to the **Impact** and **Urgency** fields of the interaction record. You can manually change these automatically populated values if needed.
- If you specify the **Impact** and **Urgency** values first and then specify an affected CI with an empty **Default Impact** or **Priority** value, the **Impact** or **Urgency** value that you selected for the interaction record is cleared.

7. Type a title and description for the interaction.
8. Select "request for change" as the category and then select the subarea.

**Note:** The system provides the area (service portfolio) because in an out-of-box system, this is the only area available.

9. If you are able to fulfill the user's request, close the interaction and document your solution.
10. If you are unable to fulfill the user's request, select the impact and urgency of the request, and then click **Escalate**.
11. The Escalation wizard starts. Follow the onscreen instructions. Service Manager creates both an interaction and a change request, and then associates the interaction to the change request. Service Manager displays the New Interaction form when the wizard finishes.

## Register a service catalog request

**Applies to User Roles:**

Service Desk Agent

You can submit a service catalog request on behalf of a user who requests the service (the service recipient). The request triggers the creation of a Service Desk interaction record.

To register a service catalog request on behalf of a service recipient, follow these steps:

1. Click **Service Desk > Create New Interaction**. The Interaction Details screen is displayed.
2. Move the cursor to the **Service Recipient** field.
3. Click the **Fill Field** button immediately to the right of the **Service Recipient** field to display the Search Contact Information screen.
4. Move the cursor to the **Contact Name** field, and then click **Search**.
5. Click the name of the person whose request you will fill. That person's name appears as the service recipient.
6. Select the affected service.
7. Select the affected CI.

**Note:**

- The **Default Impact** and **Priority** values of the affected CI are automatically populated to the **Impact** and **Urgency** fields of the interaction record. You can manually change these automatically populated values if needed.
- If you specify the **Impact** and **Urgency** values first and then specify an affected CI with an empty **Default Impact** or **Priority** value, the **Impact** or **Urgency** value that you selected for the interaction record is cleared.

8. In the **More** drop-down list, select **Order from Catalog**.

**Note:** Once you click **Order from Catalog**, you cannot change the service recipient. If you must change the service recipient, cancel the current interaction and create a new one.

9. Use one of the following methods to add items to your cart:

- **Search for the desired cart items**

The items for which you search are filtered against the service recipient's capability words. Items that match the search criteria do not display in search results unless the service recipient has the required capability words.

- **Select from Most Popular Requests**

The Most Popular Requests list displays only the cart items that are allowed by the service recipient's capability words.

- **Browse the service catalog**

The service catalog displays only the categories, items, and bundles that are allowed by the service recipient's capability words.

10. After you add the desired items to your cart, click **View Cart**.
11. If needed, click **Remove** to remove an item or click **View Catalog** to add more items to your cart, and then click **View Cart** again.

**Note:** Be sure to click **View Cart** each time before you click **Return to Request** in the next step. If you do not do this, Service Manager asks if you wish to cancel. If you select **Yes**, your requested items are canceled.

12. Click **Return to Request**.
13. Fill in the blank fields on the Interaction Details screen, and then click **Save**.

The catalog items you that requested appear in the Catalog Items section of the interaction record.

## Register an incident

### **Applies to User Roles:**

Service Desk Agent

If a user contacts you to report an incident, you can create a Service Desk interaction record to collect information about the service request. Categorize the service request as an incident, and then solve or escalate the request.

To register an incident, follow these steps:

1. Click **Service Desk > Create New Interaction**. HP Service Manager opens a blank New Interaction form and assigns the issue a unique interaction ID.

2. Select the contact for the interaction. The associated fields fill automatically.

**Note:** If you use the Fill function to replace the information in a field that already contains data, clear the field before you click Fill. If the field contains data, the Fill function does not work.

3. Select the user's preferred notification method.
4. Select the service recipient. The associated field fills automatically.
5. Select the affected service.
6. Selected the affected CI.

**Note:**

- The **Default Impact** and **Priority** values of the affected CI are automatically populated to the **Impact** and **Urgency** fields of the interaction record. You can manually change these automatically populated values if needed.
- If you specify the **Impact** and **Urgency** values first and then specify an affected CI with an empty **Default Impact** or **Priority** value, the **Impact** or **Urgency** value that you selected for the interaction record is cleared.

7. Type a title and description for the interaction.
8. Select "incident" as the Category, and then select the Area and Subarea.
9. Follow these steps to determine if there is a known solution or workaround for the user's issue:
  - a. Search the available knowledge bases.

**Note:** When you use the Search Knowledge option from the New Interaction form, Service Manager uses the interaction description text as the search query.

- b. If you find an existing solution or workaround in the knowledge bases, close the interaction by using the solution.
    - c. If you are unable to solve the user's issue, search for a problem or known error.

- d. If you find a workaround in the problem or known error records, close the interaction by using the workaround.
10. If you are still unable to solve the user's issue, select the impact and urgency of the request, and then click **Escalate**.
11. The Escalation wizard opens. Follow the onscreen instructions. Service Manager creates both an interaction record and an incident record, and then associates the interaction to the incident.

## Register a request for information

### Applies to User Roles:

Service Desk Agent

If a user contacts you to request information, you can create a Service Desk interaction record to collect information about the service request. Categorize the service request as a request for information, and then solve or escalate the request.

To register a request for information, follow these steps:

1. Click **Service Desk > Create New Interaction**. HP Service Manager opens a blank New Interaction form and assigns a unique interaction ID to the issue.
2. Select the contact for the interaction. The associated fields fill automatically.

**Note:** If you use the Fill function to replace the information in a field that already contains data, clear the field before you click Fill. If the field contains data, the Fill function does not work.

3. Select the user's preferred notification method.
4. Select the service recipient. The associated field fills automatically.
5. Select the affected service.
6. Select the affected CI.

**Note:**

- The **Default Impact** and **Priority** values of the affected CI are automatically populated to the **Impact** and **Urgency** fields of the interaction record. You can manually change these automatically populated values if needed.
- If you specify the **Impact** and **Urgency** values first and then specify an affected CI with an empty **Default Impact** or **Priority** value, the **Impact** or **Urgency** value that you selected for the interaction record is cleared.

7. Type a title and description for the interaction.
8. Select "request for information" as the category, and then select the area. Service Manager selects the subarea field automatically.
9. Determine if there is a known solution or workaround for the user's issue. To do this, follow these steps:
  - a. Search the available knowledge bases.

**Note:** The system provides the area (service portfolio) because in an out-of-box system, this is the only area available.

- b. If you find an existing solution or workaround in the knowledge bases, close the interaction by using the solution.
  - c. If you are unable to solve the user's issue, search for a problem or known error.
  - d. If you find a workaround in the problem or known error records, close the interaction by using the workaround.
10. If you are still unable to solve the issue, select the impact and urgency of the request, and then click **Escalate**. Service Manager creates both an interaction and an incident and associates the interaction to the incident.

## Update an interaction record

### Applies to User Roles:

Service Desk Agent

You can update an interaction record with additional information to assist the applicable assignment group.



To update an interaction record, follow these steps:

1. Locate the Service Desk interaction record by using one of the following methods:
  - Select a record from your interaction queue.
  - Use search or advanced search to find one or more records.
2. Update any fields that require revision.

**Note:** If you are modifying a field that uses the Fill function, clear any existing data before using the function.

3. Click **Save** to update the Service Desk interaction record.

## Cancel a new Service Desk interaction

### Applies to User Roles:

Service Desk Agent

You can cancel a new Service Desk interaction without saving it. For example, if the user no longer experiences the problem, you can cancel the interaction.

To cancel a new Service Desk interaction, follow these steps:

1. Use search or advanced search to find one or more records.
2. While in the New Interaction form, click **Cancel**.
3. Click **Yes** to cancel the interaction without saving the changes.

## Reopen an incident

### Applies to User Roles:

Service Desk Agent

If a user who is not satisfied with the solution provided for a previously registered interaction contacts you, you can reopen the incident record to address the user's concerns.

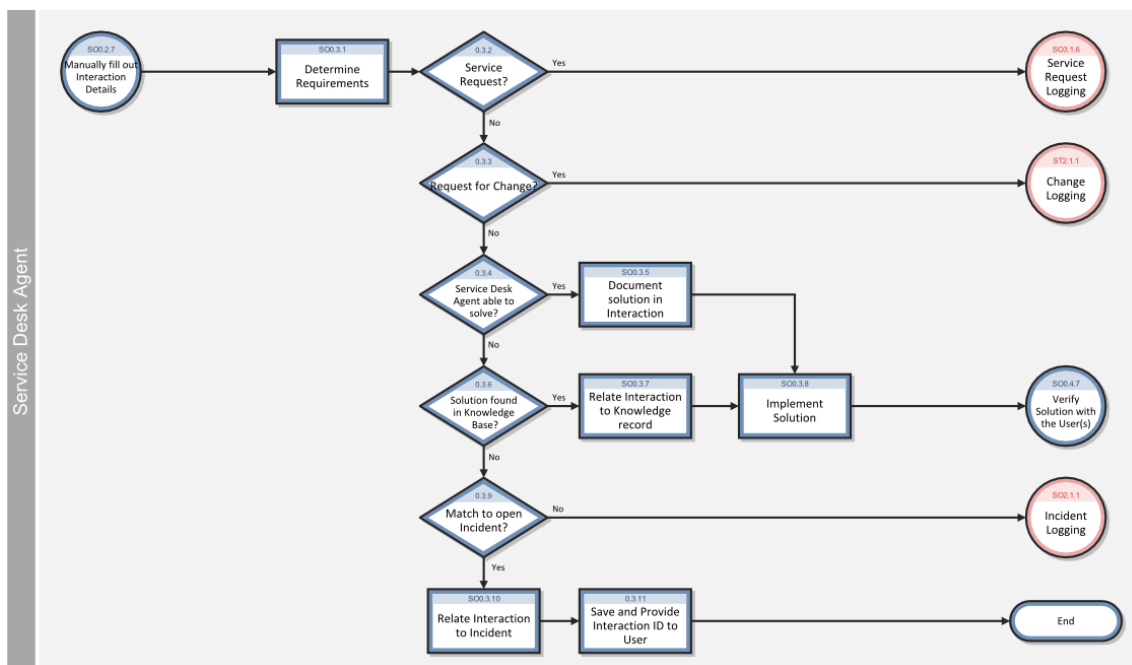
**Note:** You cannot reopen an incident record if more than two weeks have passed since you notified the user of the solution. In this situation, create a new interaction record.

To reopen an incident, follow these steps:

1. Click **Service Desk > Search Interaction Records**.
2. Use search or advanced search to find one or more records.
3. Double-click the interaction record to open it.
4. Open the Related Records section, locate the incident, and then double-click the incident record ID to open it.
5. Click **Reopen**, and then click **Save**.

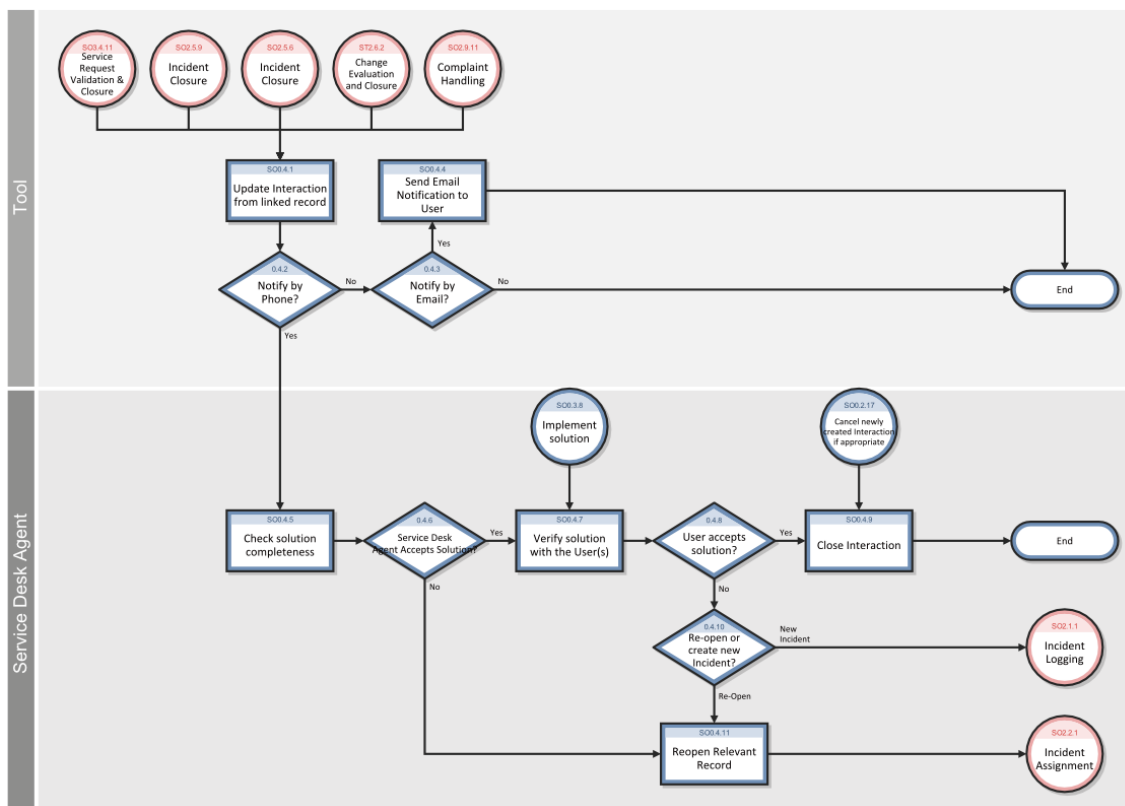
## Interaction matching and escalation (S00.3)

When an interaction is received, the Service Desk Agent determines whether the interaction is a service request or a request for change, and logs the request if appropriate. If the Service Desk Agent is not able to resolve the issue, the incident can either be related to an existing incident or logged as a new incident.



## Interaction closure (S00.4)

The interaction closure process occurs when an interaction is resolved by the Service Desk without escalation or solved when a related incident, change, or request is resolved. Based on user preferences, the Service Desk communicates the solution to the user by phone or email.



## Close a first time resolved Service Desk interaction

### Applies to User Roles:

Service Desk Agent

You can close a Service Desk interaction record without escalating it to an incident if you are able to resolve the issue immediately. Depending on your company policies, you may also need to document the solution in a knowledge base for future use.

To close a first time Service Desk interaction, follow these steps:

1. Use search or advanced search to find one or more records.
2. In the "Interaction Details" section of the Service Desk interaction form, select the closure code and type a solution for the interaction.
3. Click **Close Interaction**.

## Close an existing Service Desk interaction

### Applies to User Roles:

Service Desk Agent

You can close an existing Service Desk interaction record if the user accepts the proposed solution. If you or the user disagree with the proposed solution, do not close the interaction. Instead, resubmit the related incident for further investigation. Depending on your company policy, you may also need to document the interaction's solution in a knowledge base for future use.

To close an existing Service Desk interaction record, follow these steps:

1. Click **Service Desk > Interaction Queue**. Service Manager displays the list of open interactions.
2. Locate the Service Desk interaction record that you want to close.
3. Use the contact for this interaction to determine which user to notify of the solution.
4. If the user accepts the solution, select a closure code, and then click **Close Interaction**. If the user rejects the solution, reopen the related incident or create a new incident, and then link the incident to the unsolved interaction.

## Using mass update with Service Desk interaction record lists

The mass update feature enables you to update the value of one or more fields in a list of records. The system provides a template form that displays the current field values and enables you to type or select a new value for the displayed fields. In compliance with the data policy of your organization (as recorded in the Data Policy form), the Mass Update template form does not display read-only fields in the records. The mass update option is available from both interaction and incident record lists.

When you perform a mass update operation, make sure that the value you type or select for a particular field is the value you want in all the records that you selected. When you update incident records, you must also update the incident activity data.

System Administrators can determine if a field is displayed in the Mass Update template form by directly editing the Data Policy record for the form. To remove a field from the Mass Update form, change the Usage Type column for the field to System. If a System Administrator wants to grant Template Mass Update permissions to other operators, the System Administrator must update the operator profile to include the Template Mass Update and Complex Mass Update capabilities.

## Update multiple interaction records

### **Applies to User Roles:**

Service Desk Manager

You can use the mass update feature to update one or more values in multiple interaction records. Remember that the value you enter for a particular field becomes the value for all of the records you selected when you perform a mass update.

To update multiple records, follow these steps:

1. Locate the records by using one of the following methods:
  - Go to the Interaction Queue to display a list of records.
  - Use search or advanced search to find one or more records.
2. Click **More** or the **More Actions** icon, and then select **Mass Update**.
3. Double-click the field that you want to update.
4. Type the value for the field or use the Find feature to display a list of potential values for the field.
5. Click **Next**, and then repeat steps 3 and 4 for additional fields as needed.
6. Update the Activity Action field for the updates you made in the Mass Update template, and then click **Execute**.

To use complex update to update multiple records:

1. Locate the records by using one of the following methods:
  - Go to the Interaction Queue to display a list of records.
  - Use search or advanced search to find one or more records.

2. Select the records that you want to update.
3. Click **Mass Update**, and then click **Complex Update**.
4. Type the instructions (in RAD syntax) to be executed one time at the beginning of the mass add or mass update operation.
5. Type the instructions (in RAD syntax) for action on each record.
6. Click **Execute**.

## Duplicate an existing interaction record

### Applies to User Roles:

Service Desk Agent

You can duplicate an existing interaction record to copy information from an existing record into a new record. For example, you duplicate an existing interaction record because a user is experiencing a repeat of a past problem or issue.

To duplicate an existing interaction record, follow these steps:

1. Click **Service Desk > Search Interaction Records**.
2. Use search or advanced search to find one or more records.
3. Double-click the record to open it.
4. Click **More** or the **More Actions** icon, and then select **Duplicate Interaction**. HP Service Manager assigns the next available ID number to the duplicated interaction.
5. Add or change information in the interaction record as needed.

**Note:** You must clear any existing data in a field to use the Fill and Find functions to select a new value.

6. Click **Save & Exit**. If the record that you duplicated has any related records, a message that informs you the record has related records and asks if you want to copy the associations is displayed.

- Click **Yes** to copy associated records and return to the interaction queue.
- Click **No** if you do not want to copy the associated records to the new interaction record. The Escalation Details wizard starts, and you can relate the new record to an existing incident, an existing known error, or a new incident.

## Add a required action

### Applies to User Roles:

Service Desk Agent

A required action is an action that a service recipient or your service organization requires you to perform before an interaction can be closed. For example, the service recipient may want to be contacted by a certain date. When you make this a required action, nobody can close this interaction until someone contacts the service recipient.

By default, Service Manager defines one required action: When the Notify By field for an interaction is set to "telephone" the Service desk Agent must complete and close the required action before the interaction can be closed.

When you add a required action to an interaction record, the system updates the status of the record to Open-Callback, which means that the specified required action must be completed before the interaction and any associated incidents can be closed. The Service Desk Agent specifies what the required action is when they add the required action information to the interaction record. Required Actions lists a description of the action required for the interaction and a link to any associated incidents.

To add a required action, follow these steps:

1. Click **Service Desk > Search Interaction Records**.
2. Use search or advanced search to find one or more records.
3. Double-click the record to open it.
4. Click **More** or the **More Actions** icon, and then select **Add Required Action**.
5. Type the action details and a reason for the required action.
6. Select the incident number to associate with this interaction.

**Note:** You can click **Fill** to display a list of incidents.

7. Click **OK**.

**Note:** You cannot close the interaction until someone performs the required action.

## Set a reminder for an interaction record

### Applies to User Roles:

Service Desk Agent

You can set a reminder to notify you if an existing interaction record meets certain conditions by a specified time. For example, you may want to be reminded if an interaction is still open or is not updated by a given date.

To set a reminder, follow these steps:

1. Locate an existing interaction.
2. Click **More** or the **More Actions** menu, and then select **Set Reminder**.
3. Choose one of the following options to specify when the reminder occurs:
  - Click **Remind At** to set a reminder for a particular date and time.

**Note:** You can click **Fill** to display a calendar tool to select the date and time of the reminder.

- Click **Remind In** to set the reminder to occur after a particular time interval. If you choose this option, you must specify the time interval in hours, minutes, and seconds (use the 00:00:00 format), and then select a shift from the list.
4. In the **Remind If** field, select from the following options any conditions that you want the interaction record to meet before a notification occurs:
    - Always (default)
    - ... has not been updated



- ... is still open
  - ... is still assigned to me
5. In the Pop-up Message area of the form, select from the following options the type of notification that you want to receive:
- Pop-up
  - Page (if paging is configured, and the paging information for the contact is available)
  - Email
  - SM Mail (Service Manager Internal Mail)

**Note:** If you select the Pop-up or Page notification methods, type the reminder message format in the **Message** field. If you select the Email or SM Mail notification methods, type the title you want the notification to display in the **Title** field, and then select **Message Type**.

6. Click **OK**.

# Service Desk overview

**Note:** The topics in this document are based on the Streamlined Interaction solution, which is introduced as of Service Manager 9.41. The Streamlined Interaction feature is optional and is disabled by default. You need to manually enable it before you read the topics in this section. To enable the streamlined interaction solution, see [Enable streamlined interaction](#).

If you want to read the Service Desk help topics (Codeless mode) that are not based on new Streamlined Interaction solution, see the help content in Service Manager 9.40 Help Center (Codeless version).

HP Service Manager Service Desk enables you to restore normal service to your users as quickly as possible by resolving user requests on first contact or by immediately escalating them for proper handling. Service Desk helps you manage all user interactions, whether reported by using a Self-Service website or directly to your service desk. Service Desk enables you to achieve the following results:

- [Control the relationship between Service Desk and other Service Manager applications](#)
- [Require Service Desk interactions to follow a set process](#)
- [Log and prioritize all calls to the service desk](#)
- [Categorize types of interactions and keep track of their resolution](#)
- [Provide first-line investigation and problem diagnosis, and quickly escalate incidents and service requests that cannot be resolved within agreed-on time limits](#)
- [Request a service, provide information, or track previous requests without the assistance of a Service Desk Agent](#)
- [Increase accessibility through a single point of contact and information](#)
- [Communicate with customers and users to keep them informed of progress, impending changes, agreed-on outages, and other notifications.](#)

## User Interaction Management

The HP Service Manager Service Desk application enables a Service Desk Agent to document and track calls. Service Desk provides one-click access to other Service Manager applications to automatically

enter information received during the call.

Information that is obtained during a call can be used to open an incident record if a reported issue requires further action. Information can also be added to a record in another Service Manager application, such as Change Management.

User Interaction Management provides users with a single point of contact (the Service Desk) for all their IT Service related questions, requests, and issues, and provides resolutions to user requests within the agreed service level targets.

User Interaction Management includes all direct interactions between a user and the Service Desk by phone or by email. User Interaction Management also includes all user activities that occur by use of the self-service web portal (for example, searching the Knowledge base, checking for status updates, or logging an interaction).

## What is a Service Desk interaction?

Each time a user contacts the Service Desk, the Service Desk Agent uses HP Service Manager to create an interaction record. The Service Desk Agent records the user name, the name of the component about which the user is calling, and a description of the user request. After the Service Desk Agent collects this information, the Service Desk Agent performs the actions that are required to resolve the user request.

- If the service request can be resolved without escalating it to an incident, the Service Desk Agent can close the interaction record.
- If the service request cannot be resolved without escalating it to an incident, the Service Desk Agent searches for existing incidents that affect the same component or one of the parent assets of that component.
  - If an existing incident is found, the Service Desk Agent can associate the current interaction with the existing incident record.
  - If an existing incident record is not found, the Service Desk Agent can register a new incident based on the Service Desk interaction. Service Manager copies information from the interaction record into the newly created incident record.

For example, if a user cannot print to a network printer, the user contacts the Service Desk for assistance. The Service Desk Agent populates an interaction record with the relevant information. Because the issue cannot be resolved immediately, the Service Desk Agent opens an incident, and the incident is assigned to a technician. The technician discovers that the printer network connection is broken. The technician fixes the connection and closes the incident. The Service Desk Agent contacts the user and instructs the user to attempt printing to the network printer. If the user can successfully

print, the Service Desk Agent can close the interaction. If the user still cannot print, the Service Desk Agent may reopen the related incident record.

## Service Desk interaction list

The Service Desk interaction list provides general information about interaction records.

Column name	Description
<b>Status</b>	The status of the interaction record.
<b>Description</b>	A brief description of the reported interaction.
<b>Interaction ID</b>	The interaction record number.
<b>Impact</b>	<p>The level of impact this issue has on the company and its end users. The impact can be classified as one of the following values:</p> <ul style="list-style-type: none"><li>• 1–Enterprise</li><li>• 2–Site/Department</li><li>• 3–Multiple Users</li><li>• 4–User</li></ul>
<b>Urgency</b>	<p>The importance of the service request to the recipient. The urgency can be classified as one of the following values. The default value is 4–Low.</p> <ul style="list-style-type: none"><li>• 1–Critical (Severe business disruption) The business unit or subunit is unable to operate; a critical system component has failed or is severely impaired.</li><li>• 2–High (Major business disruption) A critical user or user group is unable to operate, or the business unit experiences a significant reduction in system performance.</li><li>• 3–Average (Minor business disruption) A single user is unable to operate with no available work around.</li><li>• 4–Low (Minor disruption) A single user or user group is experiencing incidents, but a workaround is available.</li></ul>
<b>Priority</b>	The priority value is calculated by using the initial impact and urgency values.

## What is a category?

HP Service Manager uses the category to which a record is assigned to determine what work needs to be performed in order to close an interaction or incident record. For example, an interaction record that describes an email incident requires different work than an interaction record regarding a search for equipment for a new employee.

The Service Desk and Incident Management applications each provide the same list of categories from which to choose. When an interaction is escalated to an incident, the category in the new incident record is the same as the category assigned to the associated interaction record. The category you assign to a record determines the following information:

- Who is responsible for resolving a call report or incident record (the default assignment group)
- Which information you need to open the interaction record or incident record
- Which solutions to search for in the Knowledge base
- The applicable Service Level Agreements
- The default severity of the record
- The default priority of the record
- How quickly a record must be resolved
- The time interval for escalating a record to a higher alert stage
- Who must be notified as the record is escalated

The processing logic for each category is the same. However, Service Manager may use different record forms for each category. The sections displayed on the forms depend on the assigned category because each category has different information requirements. For example, the information that is required to fix a software error is different from the information that is required to solve an equipment failure.

## Out-of-box Service Desk categories

The following table lists the out-of-box Service Desk categories. Depending on the category that you select, HP Service Manager may require you to further categorize the interaction record by selecting an Area and Subarea.

Category	Use
<b>Complaint</b>	Interactions in which the user reports less than satisfactory service or performance.
<b>Incident</b>	Interactions that are opened specifically to start an incident management process.
<b>Request for Change</b>	Interactions that are opened specifically to start a change process.
<b>Request for Information</b>	Call or incidents that request information only.

Categories can be created and revised by the System Administrator. Therefore, additional categories may be available to you.

## Notify By field

The Notify By field specifies how to contact the person or customer who initiated an interaction. If the interaction record is associated with another record, the information in the Notify By field affects how the interaction record is closed. For example, if you associate an incident record to an interaction record, the related interaction record closes according to the information in the Notify By field when the incident record is closed.

Notify By setting	Description
<b>None</b>	The interaction record closes.
<b>Email</b>	HP Service Manager sends an email to the contact who is listed in the interaction record to inform the contact that the related record is closed. HP Service Manager then closes the interaction record.
<b>Telephone</b>	Notification by telephone adds a required action to the interaction record. The required action explains why the customer needs to be called back. This setting also prevents the interaction record from being closed until all required actions are complete.

**Note:** There is no dependency between the Notify By field and the Notification Engine. You must configure any notifications to the person in the Notify By field manually.

## Affected CI field in Service Desk

The information that is available to populate the Affected CI field depends on the service recipient.

For example, if the recipient has individual or departmental subscriptions, a list of CIs associated with those subscriptions opens. If the recipient does not have any subscriptions and is a self-service user, no list is generated. However, if a recipient does not have any subscriptions and is not a self-service user, the following behavior occurs:

- If an interaction recipient is specified, a list of the CIs assigned to that recipient opens.
- If a location is specified, a list of the CIs assigned to that location opens.
- If a company is specified in a multi-company system, a list of the CIs assigned to that company opens.
- If a device type is specified, a list of the CIs of that type opens.

**Note:** The only way to obtain a list of all CIs is to click the Affected CI field before you enter any recipient information.

## Required actions

The Required Actions function enables you to track the steps that are necessary to resolve an interaction record. You can view any required actions for an interaction record by opening the Required Actions section of the interaction form. The Required Actions section is available only for interaction records that have required actions. You can add a required action to existing interaction records that have related incident records only. You cannot close an interaction record that is associated to incomplete required actions.

For example, if you use the Full Help Desk model to close an interaction and the Notify By field is set to "telephone" a required action is automatically created and must be closed before the interaction can be closed. Therefore, the Service Desk Agent is required to call the customer and verify the issue is fixed, close the required action, and then close the interaction.

## Working with Service Desk interaction records

The Service Desk functions that are available to you depend on your user profile. You may be able to access all Service Desk functions, or you may be limited by the capability words that are assigned to you in your operator record.

Depending on your user profile, the following Service Desk functions may be available to you.

Function	Description
<b>Create New Interaction</b>	From a blank Service Desk interaction form, you can log information about a service request, check for related interaction records, and add service request information to other HP Service Manager records, such as incident records. From this form, you can escalate the request to an incident record.
<b>Interaction Queue</b>	View the Service Desk interaction queue. You can also view other queues, such as the incident queue, problem queue, Change Management change and task lists, and quotes and order lists for all users.
<b>Search Interactions</b>	Specify filtering information to locate a specific Service Desk interaction record.
<b>Security Files</b>	Add new users, edit the profile of an existing user, maintain macros, views, and probable cause records. Requires administrative rights.
<b>Search Knowledgebase</b>	Access the HP Service Manager Knowledge Base search form.

## Hover-over forms for interaction records

Service Desk interaction record forms include hover-over forms. A hover-over form is displayed when you move the mouse over a field that supports hover-over forms. Hover-over forms are only displayed when the field contains data. The data that is displayed in hover-over forms is read-only.

Service Desk interaction record forms contain the following hover-over fields.

Field	Subform fields
<b>Contact</b>	Full Name, Telephone, Email
<b>Service Recipient</b>	Full Name, Telephone, Email
<b>Affected CI</b>	Critical CI, Pending Change

## Related records in Service Desk

HP Service Manager lists all related records for an interaction record in the Related Records section. All information is read-only, but you can click a record ID to view the related record. The related records are listed in alphabetic order by the record file name: Change (cm3r), Interaction (incident), Known Error (knownerror), Request (ocmq), Incident (probsummary). Within each module, the records are sorted by ID number, in ascending order.

The Service Desk Related Records section contains the following fields.



Field	Description
<b>ID</b>	The related record number in the database.
<b>Type</b>	Identifies the related record as related to a change, interaction, known error, request, or incident.

## Activities section

The Activities section allows users to enter new updates for a record or to view journal updates and historic activities for a record.

**Note:** The Activities section is only available in the interactions that are categorized as complaints or compliments.

## New update

Field	Description
<b>New Update Type</b>	Specifies or categorizes the activity update (for example, communication with the customer)
<b>Visible to Customer?</b>	Makes the update visible to customers so they can view related interactions via self service
<b>New Update</b>	Used to enter notes to explain and describe updates made for the record. If Journaling is enabled, the text entered here is displayed in Journal Updates. If Activities are enabled, the text entered in this field is displayed as an activity record for the selected activity type.  <b>Note:</b> The System Administrator is responsible for enabling Journaling and Activities.

## Journal updates

Journal updates displays text entered in the **New Update** field together with a timestamp for the update. This field displays information when Journaling is enabled.

## Activity type

To filter the list by the type of activity, select an activity type, and then click **Filter**. Service Manager opens a new record list that displays the records of that activity type.

The activities list displays activities for the current record. The activities are listed in order of occurrence, with the most recent activity displayed first. The following information is displayed for each activity:

- Date/Time
- Type
- Operator
- Description

## Service Catalog requests

You can track your Service Catalog requests on the Service Desk update interaction form. When you submit a request by using the Service Catalog, you can view the request record in Service Desk. An interaction record for a Service Catalog request includes two additional sections, Approvals and Catalog Items.

### Approvals section

The Approvals section contains the following subsections.

Subsections	Description
<b>Current Approvals</b>	Displays a table that lists current catalog requests and the approval details
<b>Approval Log</b>	Displays a log of the approval actions which have been performed regarding the catalog requests

### Catalog Items section

The Catalog Items section contains the list of items for the catalog request and the details of the each item in the request. This section also includes the **Edit Cart** button, which links you to the Service Catalog so that you can change your catalog request.

## Associating a Service Desk interaction with another application record

You can associate a Service Desk interaction record with an existing request or request for change. Before you associate an interaction record with another record, you must know the ID number of the other record. For example, if the ID number of an existing quote is Q1001, you need this number to create the association.

## Priority, impact, and urgency

Priority is how an individual service desk interaction, change request, incident, or problem fits into the ongoing sequence of tasks required to close the interaction, change request, incident, or problem. It also indicates how soon the work should begin. Determining the priority of a single service desk interaction, change request, incident, or problem depends on how many other defects need attention, the risk of delay, and the resources available to fix it.

Impact is the potential business vulnerability. There is no global value; it is subjective and each business must set and modify its own impact value list.

Urgency is a value that reflects how soon the defect must be resolved to avoid business consequences. It identifies how soon you must react to avert or reduce the impact of the defect on customers.

Assigning values to impact and urgency is subjective. Priority is a HP Service Manager calculation based on the values you specify for impact and urgency. As you can experience assigning impact and urgency values, you will refine your decision criteria. A service desk interaction, change request, incident, or problem that is isolated can have a low impact initially, but a high urgency because of the potential for damage if the defect becomes widespread. For example, a new computer virus is a problem that can escalate quickly.

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Just add your feedback to the email and click send.

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