HP Service Manager

Software Version: 9.41

For the supported Windows® and UNIX® operating systems

Service Desk (Streamlined Interaction) help topics for printing

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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 user requests that cannot be resolved within agreed-on time limits to fulfillment processes
- Request a service, provide information, or track previous requests without the assistance of a Service Desk Agent
- 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 user request is a complaint or compliment, the Service Desk manager can handle the interaction and close it.
- If the user request can be resolved by the Service Desk agent on first contact, the Service Desk agent will use the interaction to trigger an incident or a service request, and then close the incident or service request directly with the solution provided. Then, the interaction will be closed automatically.
- If the user request cannot be resolved without escalation, the Service Desk agent can register a new record in a fulfillment process (such as the incident, service request, problem, or change fulfillment process) based on the Service Desk interaction. Service Desk copies information from the interaction record into the newly created fulfillment record.

For example, consider a user who 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.

- The Service Desk agent opens an incident from the interaction, 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 interaction is automatically closed accordingly.
- 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 send out survey based on the closed interaction. If the user still cannot print, the Service Desk agent may register a new interaction and then trigger the interaction to a new incident.
- If the user wishes to report a related or new issue, the Service Desk agent opens a new interaction detailing the new issue that the user needs to report.

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. For example, a service interruption logged in the incident category could have a different workflow than a service catalog request category interaction. The steps to manage and resolve the incident category interaction may differ from the steps for a service catalog request category interaction.

The category of the interaction determines which Process Designer workflow the interaction uses, and the workflow determines which forms and required fields are displayed. In addition, the category of the interaction determines which Service Manager process is invoked when you escalate an interaction. Categories of the complaint or compliment type are handled entirely as other types of interactions; however, you cannot escalate these interactions.

> **Note:** Your organization may have customized many workflows to handle interactions, and may also have applied different service agreements to those workflows.

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 a

Subcategory and Area.

Category	Description
complaint	Interactions in which the user reports less than satisfactory service or performance.
compliment	Interactions in which the user reports exemplary service or performance.
incident	Interactions that are opened specifically to start the incident management process.
problem	Interactions that are opened specifically to start the problem management process.
request for administration	Interactions that are opened specifically to request assistance from a system administrator, such as a password resets or rights to access a specific area.
request for change	Interactions that are opened specifically to start the change process.
request for information	Interactions that are requests for information only.
service catalog	Interactions that are requests for items from the service catalog.
service request	Interactions that are opened specifically to start the request fulfillment process.
support catalog	Interactions that are requests for support from the support catalog.

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
None	The interaction record closes.
E-mail	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

Notify By setting	Description
	Manager then closes the interaction record.
Telephone	The contact who is listed in the interaction record is called back to be informed that the related record is resolved.

Note: In Service Manager Codeless, you can configure HTML Rulesets from the workflow to send notifications as needed.

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 security role, the following Service Desk functions may be available to you.

Function	Description
Create Streamlined Interaction	From a blank Service Desk interaction form, you can log information about a service request, and add service request information to other HP Service Manager records, such as incident records. From this form, you can: • Trigger the interaction to an incident, a problem, a change, or a request. • Log a complaint or compliment. • Request an item from the Service Catalog or Support Catalog.
Interaction Queue	View the Service Desk interaction queue. You can also view other queues, such as the queues for incidents, problems, requests, changes, and any associated tasks lists.
Search Interactions	Specify filtering information to locate a specific Service Desk interaction record or set of records.

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
Contact	Full Name, Telephone, Email
Service Recipient	Full Name, Telephone, Email

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), Request (request), Incident (probsummary). Within each module, the records are sorted by ID number, in ascending order.

The **Related Records** section in Service Desk contains the following fields.

Field	Description
ID	The number of the related record in the database.
Type	• Trigger To: The interaction is escalated to a different fulfillment process, such as Incident Management, Change Management, Request Fulfillment, and so on. • Fulfillment: When a service catalog or support catalog request (interaction) is submitted and approved, the fulfillment records are created accordingly.
Phase	The current phase of the related record.
Status	The current status of the related record.
Title	The title of the related record.

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
New Update Type	Specifies or categorizes the activity update (for example, communication with the customer)
Visible to Customer?	Makes the update visible to customers so they can view related interactions via self service
New Update	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. **Note:** 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
Current Approvals	Displays a table that lists current catalog requests and the approval details
Approval Log	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.

Triggering a fulfillment process from a streamlined Service Desk interaction

You can trigger a fulfillment process when you create a Service Desk interaction record by selecting a category. When the fulfillment process is triggered, a fulfillment record is created and linked to the interaction.

Note: The interactions that are in the "complaint" or "compliment" categories are handled in the Service Desk module without creating a new fulfillment record.

The following table describes the categories and their corresponding processes in the out-of-box system.

Interaction category	Fulfillment process to be triggered
incident	Incident Management
request for information	Request Fulfillment
problem	Problem Management
service request	Request Fulfillment
request for administration	Request Fulfillment
request for change	Change Management
service catalog	Service Catalog (Request a service catalog item or bundle) After you order an item or bundle, based on the connector definition of the ordered item or bundle, one or more fulfillment records are created and linked to the interaction.
support catalog	Support Catalog (Request a non-cart item) After you order a support catalog item, based on the connector definition of the ordered item, a fulfillment record is created and linked to the interaction.
complaint	Complaint process (the "Streamlined Complaint or Compliment" workflow) in Service Desk.
compliment	Compliment process (the "Streamlined Complaint or Compliment" workflow) in Service Desk

Interaction status

If a Service Desk interaction is linked to a fulfillment record such as an incident, the system automatically updates the interaction status based on the status of its fulfillment record:

- Once the fulfillment record is created and linked to the interaction, the interaction status moves to “Dispatched” automatically.
- Once the fulfillment record is in the “Pending Customer” status, the interaction status moves to “Pending Customer” automatically.

- Once the fulfillment record is abandoned or closed, the interaction status moves to “Closed” automatically.
- If the fulfillment record is an incident, when the incident moves to the "Resolved" status, the interaction status also moves to “Resolved” automatically. The interaction solution is also updated automatically according to the solution that was updated in the incident record.

If you want to configure the out-of-status mapping rules, see "Configure status mapping between streamlined interactions and fulfillment records" on page 47.

Service Desk user roles

The following table describes the responsibilities of the Service Desk user roles.

Service Desk user roles

Role	Responsibilities
User	• 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
Service Desk Agent	• Open interactions based on contact with the user • Solve and close interactions • Provide status updates to users on request • Register incidents based on user interactions and assign them to the correct support groups • Register requests for change, based on user interactions • Register service requests, based on user interactions • Register problems, based on user interactions • Validate solutions provided by support groups • Report and verify solutions to users • Monitor the Service Level Agreement (SLA) targets of all registered interactions • Communicate service outages to all users
Service Desk Manager	• Appoint people to the required roles • Manage resources assigned to the service desk • Manage service desk activities • Attend CAB meetings • Report any issue that could significantly impact the business to senior managers

Role	Responsibilities
	• Take overall responsibility for incident and service request handling on the service desk • Monitor and report on service desk performance • Make improvements to the service desk

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

In an out-of-box system, depending on the interaction categories, different fulfillment processes are triggered to help fulfill the user requests. Only the interactions that are in the "complaint" or "compliment" categories are handled in the Service Desk module. The following table describes the categories and their corresponding processes in the out-of-box system.

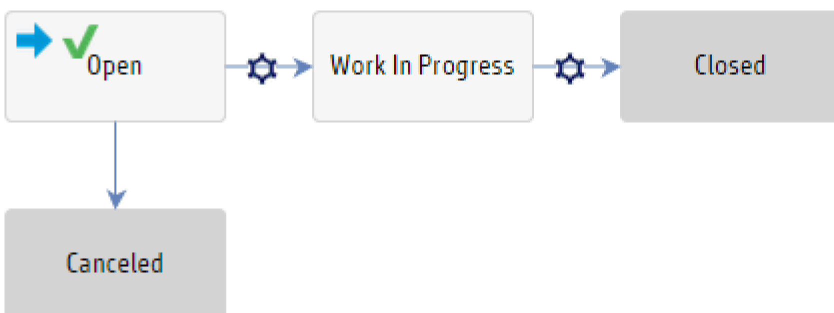
Interaction category	Workflow	Fulfillment process to be triggered
incident	Streamlined Service Desk	Incident Management
request for information	Streamlined Service Desk	Request Fulfillment
problem	Streamlined Service Desk	Problem Management
service request	Streamlined Service Desk	Request Fulfillment
request for administration	Streamlined Service Desk	Request Fulfillment
request for change	Streamlined Service Desk	Change Management
service catalog	Streamlined Service Catalog	Service Catalog (Request a service catalog item or bundle) After you order an item or bundle, based on the connector definition of the ordered item or bundle, one or more fulfillment records are created and linked to the interaction.
support catalog	Streamlined Service Desk	Support Catalog (Request a non-cart item) After you order a support catalog item, based on the connector definition of the ordered item, a fulfillment record is created and linked to the interaction.
complaint	Streamlined Complaint or Compliment	Complaint process (the "Streamlined Complaint or Compliment" workflow) in Service Desk.

Interaction category	Workflow	Fulfillment process to be triggered
compliment	Streamlined Complaint or Compliment	Compliment process (the "Streamlined Complaint or Compliment" workflow) in Service Desk

For the categories that are associated with the "Streamlined Service Desk" or "Streamlined Service Catalog" workflow, when the fulfillment process is triggered, a fulfillment record is created and linked to the original interaction. When the fulfillment record is closed, the corresponding interaction record is also closed automatically.

For the complaint and compliment categories, the "Streamlined Complaint or Compliment" workflow is provided so that the interactions in these categories can be handled appropriately in the Service Desk module without triggering a fulfillment process.

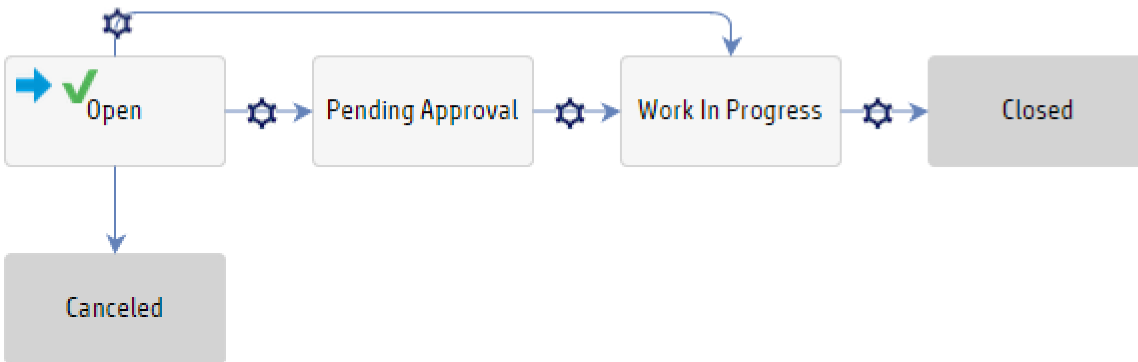
- Streamlined Service Desk



The Streamlined Service Desk workflow handles interactions in the following categories and triggers corresponding fulfillment processes:

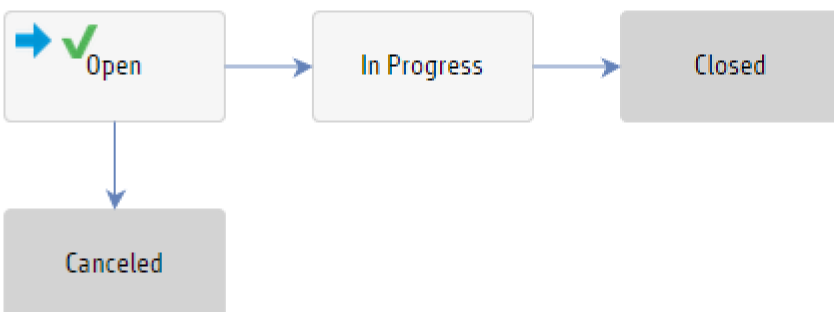
  - incident
  - request for information
  - problem
  - service request
  - request for administration
  - request for change
  - support catalog

- Streamlined Service Catalog



The Streamlined Service Catalog workflow handles service catalog requests. After you order a service catalog item, based on the connector definition of the ordered item, one or more fulfillment records are created and linked to the interaction.

- Streamlined Complaint or Compliment



The Streamlined Complaint or Compliment workflow handles user complaints and compliments.

To view more workflow diagrams and other information about the Service Desk process, refer to the Process Designer Best Practices Guide that is linked to in the related topics.

Self-Service user interactions

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**.

   > **Note:** Service Desk agents or other operators can access your submitted attachments directly from the fulfillment records that are linked to your request.

7. Click **Submit**.

   > **Note:** After you submit your self-service request, Service Manager automatically creates the corresponding fulfillment record in the system so that your self-service request can be handled appropriately.

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.

   Note: When you close your self-service request, an activity update is added to the corresponding back-end fulfillment records to reflect that you have closed the self-service request.

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.

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**.

Note: If the Service Desk interaction record is linked to a request , an incident, or a change record, your updates are automatically copied to the **Activities** section in the linked record.

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.

   The status of a Service Desk interaction is based on the status of its fulfillment record:

   - Once the fulfillment record is created and linked to the interaction, the interaction status moves to “Dispatched” automatically.
   - Once the fulfillment record is in the “Pending Customer” status, the interaction status moves to “Pending Customer” automatically.
   - Once the fulfillment record is abandoned or closed, the interaction status moves to “Closed” automatically.
   - If the fulfillment record is an incident, when the incident moves to the "Resolved" status, the interaction status also moves to “Resolved” automatically.
2. Select the Service Desk interaction record that you want to view.
3. Click **Back** to return to the list of service requests.

Create a streamlined interaction

User role: Service Desk Agent

You can create an interaction to collect information about a service or support request from a user. After you categorize the user request (such as an incident, a request for change, a service catalog request, a complaint, and so on), you can proceed with the process that associated with the category to solve the user request.

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

1. Click **Service Desk** > **Create Streamlined Interaction**. The New Interaction form is displayed.

2. In the **Contact** field, select the contact person for the interaction.

   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 **Service Recipient** field, select the service recipient.

4. In the **Notify By** field, select the user's preferred notification method.

5. Type a description for the interaction.

6. In the **Category** field, select the category for the interaction.

7. (Optional) In the **Subcategory** and **Area** fields, select the subcategory and area for the interaction.

8. In the **Affected Service** field, select the affected service.

9. Click the **Continue** button. After you click **Continue**, an interaction record is created and the fulfillment process associated with the selected category is initiated. Then, you can follow the workflow of the triggered process to handle the user request.

   The following table describes the categories and their corresponding processes in the out-of-box system.

Interaction category	Fulfillment process to be triggered
incident	Incident Management
request for information	Request Fulfillment
problem	Problem Management
service request	Request Fulfillment
request for administration	Request Fulfillment
request for change	Change Management

Interaction category	Fulfillment process to be triggered
service catalog	Service Catalog (Request a service catalog item or bundle) After you order an item or bundle, based on the connector definition of the ordered item or bundle, one or more fulfillment records are created and linked to the interaction.
support catalog	Support Catalog (Request a non-cart item) After you order a support catalog item, based on the connector definition of the ordered item, a fulfillment record is created and linked to the interaction.
complaint	Complaint process in Service Desk
compliment	Compliment process in Service Desk

Tip: If the fulfillment record has not been created, you can click **Cancel** or **Back** to go back to the interaction logging form. Then, you can change the interaction category to trigger another fulfillment process.

10. Enter the information as necessary in the fulfillment record, and then click **Save**.

Change the category of a standalone interaction

Applies to User Roles:

Service Desk Agent

If an interaction is a standalone interaction without any related fulfillment records, you can change the category of the interaction, and then trigger the corresponding fulfillment process. For example, you may need to trigger a different fulfillment process to resume your work on a user request.

Note: The **Change Category** option is only available for the standalone interaction without any related fulfillment records. If the interaction is already in the Dispatched status and linked to a fulfillment record, you cannot change the category of the interaction.

To change the category of an open interaction, follow these steps:

1. Click **Service Desk** > **Interaction Queue**. Service Manager displays the list of interactions.
2. Locate and open a Service Desk interaction record that is in the Open status and is not a service catalog or support catalog request.
3. On the interaction detail form, click **More** > **Change Category**.
4. Select a category, and then click **Yes** for confirmation.
5. Click the **Continue** button. The corresponding fulfillment process is triggered.
6. Follow the triggered fulfillment process to fulfill the user request.

Cancel an interaction

Applies to User Roles:

Service Desk Agent

You can cancel an interaction (not a service catalog or support catalog request) that is in the Open status. For example, if the user no longer experiences the problem, you can cancel the interaction without triggering a fulfillment process.

Note: The **Cancel Interaction** button is only available for the interaction that is still in the Open status and is not a service catalog or support catalog request. If the interaction is in the Dispatched status, you cannot cancel the interactions.

To cancel a Service Desk interaction, follow these steps:

1. Click **Service Desk** > **Interaction Queue**. Service Manager displays the list of interactions.
2. Locate and open a Service Desk interaction record that is in the Open status and is not a service catalog or support catalog request.
3. On the interaction detail form, click the **Cancel Interaction** button.
4. click **Yes** to confirm that you want to cancel this interaction.

   The interaction is now in the Canceled status.

Close a first-time resolved Service Desk interaction

Applies to User Roles:

Service Desk Agent

If a Service Desk interaction is triggered to an incident or a request record, you can resolve the user request on the first intake in the Logging phase of the triggered incident or request record. After the related incident or request is resolved, the Service Desk interaction is also closed automatically.

To close a first time Service Desk interaction that is triggered to an incident or a request record, follow these steps:

1. From the System Navigator, click **Service Desk** > **Create Streamlined Interaction**.
2. Select a category that is associated with the Incident Management or Request Fulfillment process.

   In an out-of-box system, the incident category is associated the Incident Management process while the service request, request for information, and request for administration are associated with the Request Fulfillment process.
3. Specify the information in other mandatory fields.
4. Click **Continue**. The interaction is created and the New Incident or New Request form is displayed.
5. On the New Incident or New Request form, specify the information in the mandatory fields.
6. Type a solution for the incident or request.
7. Click the **Close Directly** button on the toolbar.

   Service Manager displays the **Close Incident** or **Close Request** page.
8. Specify the information in the mandatory fields such as **Closure Code**.
9. Click **Finish**.

   The status of the incident or request changes to **Closed**. Meanwhile, the original interaction is also closed automatically along with the incident or request.

Handle a complaint or compliment

Applies to User Roles:

Service Desk Manager

If a user contacts you regarding a service complaint or compliment, you can create a Service Desk interaction to collect information about the user's service request. Categorize the service request as a complaint or compliment, and then solve the request.

To register a complaint or compliment, follow these steps:

1. Click **Service Desk** > **Create Streamlined Interaction**. The New Interaction form is displayed.
2. Specify the **Contact** for the interaction.

   > **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 **Service Recipient** field, select the service recipient.
4. In the **Notify By** field, select the user's preferred notification method.
5. In the **Description** field, type a description for the interaction.
6. In the **Category** field, select "complaint" or "compliment" as the category.
7. (Optional) In the **Subcategory** and **Area** fields, select the subcategory and area for the interaction.
8. (Optional) In the **Affected Service** field, select the affected service.
9. Click the **Continue** button. An interaction record is created and the interaction detail form is displayed.
10. On the **Assignment** tab, specify the assignment group and the assignee.
11. Click **Save**.

To close a complaint or compliment, follow these steps:

1. Locate and open the complaint or compliment interaction record that is in the "Open" status.
2. Make sure that the **Assignment Group** and the **Assignee** fields are specified, and the click **Fulfill**. The interaction status changes to "In Progress."
3. In the **Closure Code** field, specify a closure code.

4. In the **Solution** field, type the solution information.

5. Click **Close**. The complaint or compliment interaction record is closed.

Access Service Desk views

Applies to User Roles:
Service Desk Agent

Streamlined Service Desk views contained in the Favorites and Dashboards navigation pane enable you to easily and quickly access specific types of records.

To view the streamlined Service Desk views, click **Favorites and Dashboards** > **Streamlined Service Desk**. HP Service Manager provides the following default streamlined Service Desk views:

- Interactions with initial process target – Breached

- Interactions with initial process target – Breach within 1 hour

- Interactions with initial process target – Breach within 4 hours

- Open Complaints and Compliments Assigned to Me

Service Catalog support

When a user (the service recipient) submits a Service Catalog or Support Catalog request through the SRC or ESS portal, a Service Desk interaction is created in the “service catalog” or specified category to help the Service Desk agent to fulfill the request for the service recipient.

A Service Desk agent can also submit a Service Catalog request (**Service Catalog** > **Order from Catalog**) or a Support Catalog request (**Service Catalog** > **Non-cart Catalog Requests**) on behalf of a user who requests the service through an email or phone call. The Service Catalog request triggers a Service Desk interaction in the "service catalog" category while the Support Catalog request triggers an interaction in the specified category.

Order from Service Catalog

Applies to User Roles:

Service Desk Agent

You can submit a Service Catalog or Support Catalog request on behalf of a user requesting the service (the service recipient). The request triggers Service Desk interaction in the "service catalog" or specified category.

Register a Service Catalog request

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

1. Click **Service Desk** > **Create Streamlined Interaction**. The New Interaction form is displayed.
2. In the **Contact** field, select the contact person for the interaction.
3. In the **Service Recipient** field, select the service recipient.
4. In the **Notify By** field, select the user's preferred notification method.
5. Type a description for the interaction.
6. In the **Category** field, select "service catalog" as the category for the interaction.
7. Click **Continue**. The form for selecting service catalog items is displayed.

   > **Note:** You can also search for and open an existing interaction that is in the "Open" status and the "service catalog" category, and then click the **Continue** button.

8. Add items to your cart by doing one of the following:
   - Search for the desired 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.
9. After you add the desired items to your cart, click **View Cart/Checkout**.
10. If needed, click **Remove** to remove an item or click **Return to Catalog** to add more items to your cart, and then click **View Cart/Checkout** again.

11. Click **Resubmit Request**.

    The catalog items you requested appear in the **Catalog Items** section of the interaction record. Once this Service Catalog request is approved, fulfillment records are created and linked to the interaction based on the connector definition of the ordered items.

Register a Support Catalog request

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

1. Click **Service Desk** > **Create Streamlined Interaction**. The New Interaction form is displayed.
2. In the **Contact** field, select the contact person for the interaction.
3. In the **Service Recipient** field, select the service recipient.
4. In the **Notify By** field, select the user's preferred notification method.
5. Type a description for the interaction.
6. In the **Category** field, select "support catalog" as the category for the interaction.
7. Click **Continue**. The form for selecting support catalog items is displayed.

    > **Note:** You can also search for and open an existing interaction that is in the "Open" status and the "support catalog" category, and then click the **Continue** button.

8. Select your support catalog item by doing one of the following:

    - Search for the desired 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 support catalog:
      The support catalog displays only the categories and items that are allowed by the service recipient's capability words.

9. After you select the desired item, specify the required information, and then click **Submit**.

The support catalog item you requested appears in the **Catalog Items** section of the interaction record. In addition, based on the connector definition of the ordered item, a fulfillment record is created and linked to the 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**.

Access Service Desk reports

User Roles: Service Desk Agent

The Reporting tool in HP Service Manager provides a number of out-of-box reports on the interaction data in your system. You can view these reports through a dashboard named Service Desk Overview (Global). You can also create your own dashboards to display other reports of your interest.

To access Interaction Management reports, follow these steps:

1. Click **Service Desk** > **Service Desk Overview**.

   By default, the **Service Desk Overview (Global)** dashboard is displayed.

2. View the reports on the dashboard. For descriptions of these reports, see "Report descriptions and usage" on page 1.
3. If needed, click the **Create New Dashboard** button to add your own dashboards. For details, see "Create a dashboard" on page 1.

   Your custom dashboards are added to the dashboard list on the toolbar of the dashboard page.

   > **Tip:** You can click **Export** to export the reports on a dashboard to PDF format.

4. Click the **Open dashboard settings** icon on a dashboard to set its properties, or click the **Set as Default Dashboard** button to set it as your default dashboard.

Service Desk administration

Service Desk administration consists of the following:

- Service Desk Environment: Service Desk application contains an environment record for interactions. This record contains options that defines the functionality of the Service Desk application for all Service Desk users.
- Settings: You can enable the "Create New Interaction" menu entry, and you can set the default category for new interactions.

Enable streamlined interaction

Applies to User Roles:

System Administrator

To enable the streamlined interaction solution, follow these steps:

1. Click **Service Desk** > **Administration** > **Settings** in the System Navigator, and then clear the **Enable "Create New Interaction" Menu Entry** option.
2. Manually change the workflows that are associated to interaction categories to the streamlined interaction workflows according to the following table:

Interaction category	Associated workflow in SM Codeless (Out-of-box)	Workflow for streamlined interaction	Fulfillment process to be triggered from a streamlined interaction
incident	ServiceDesk	Streamlined Service Desk	Incident Management
request for information	ServiceDesk	Streamlined Service Desk	Request Fulfillment
problem	ServiceDesk	Streamlined Service Desk	Problem Management

Interaction category	Associated workflow in SM Codeless (Out-of-box)	Workflow for streamlined interaction	Fulfillment process to be triggered from a streamlined interaction
service request	ServiceDesk	Streamlined Service Desk	Request Fulfillment
request for administration	ServiceDesk	Streamlined Service Desk	Request Fulfillment
request for change	ServiceDesk	Streamlined Service Desk	Change Management
support catalog	N/A	Streamlined Service Desk	Support Catalog (Request a non-cart item) After you order a support catalog item, based on the connector definition of the ordered item, a fulfillment record is created and linked to the interaction.
service catalog	Service Catalog	Streamlined Service Catalog	Service Catalog (Request a service catalog item or bundle) After you order an item or bundle, based on the connector definition of the ordered item or bundle, one or more fulfillment records are created and linked to the interaction.
complaint	ServiceDesk	Streamlined Complaint or Compliment	Complaint process (the "Streamlined Complaint or Compliment" workflow) in Service Desk.
compliment	ServiceDesk	Streamlined Complaint or Compliment	Compliment process (the "Streamlined Complaint or Compliment" workflow) in Service Desk

3. Manually activate the "support catalog" interaction category (that is, set the **Active** setting to TRUE).
4. (Optional) Enable the following out-of-box views for Streamlined Interaction by changing the Audience and Ownership from the default value ("falcon") to the appropriate operators in your

organization:

Folder:

- Streamlined Service Desk

Views:

- Interactions with initial Process Target – Breached;
- Interactions with initial Process Target – Breach within 1 hour;
- Interactions with initial Process Target – Breach within 4 hours;
- Open Complaints and Compliments Assigned to Me

5. Log out and log back on.

   Now, the streamlined interaction is enabled and you can create streamlined interactions from **Service Desk** > **Create Streamlined Interaction**.

   > **Note:** If Smart Analytics is enabled, the menu entry for streamlined interaction is still **Create Smart Interaction** after you enable streamlined interaction, but the underlined interaction workflows are now supported by streamlined interaction. For more information, see "Consolidated menu entry for interaction creation" on page 44.

Configure the Service Desk settings

Applies to User Roles:

System Administrator

To configure Service Desk settings, follow these steps:

1. Click **Service Desk** > **Administration** > **Settings** in the System Navigator.
2. Configure the following settings for the Service Desk application:

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td>Enable "Create New Interaction" Menu Entry</td><td>
This setting determines whether the interactions will be created to follow the legacy interaction workflows (select the check box) or the new streamlined workflows introduced as of SM 9.41 (clear the check box).
The streamlined interaction solution is disabled by default so that if you want to run your previous interaction processes (workflows) as in 9.40 Codeless, you can continue to use them without any issues or additional configuration when you upgrade to Service Manager 9.41.
To enable the streamlined interaction solution, see Enable streamlined interaction.
Note: The menu entry for creating new interactions also depends on whether the SM Smart Analytics feature is enabled or not. For more information, see "Consolidated menu entry for interaction creation" on the next page.
If you use streamlined interaction and later you decide to select this check box to go back to the legacy interaction workflow, you need to go into the Interaction category records and change the workflow back to the non-streamlined workflows. The following table is for your reference:
<table>
<tr><th>Interaction category</th><th>Associated non-streamlined workflow in SM Codeless</th><th>Associated workflow in streamlined interaction solution</th></tr>
<tr><td>complaint</td><td>ServiceDesk</td><td>Streamlined Complaint or Compliment</td></tr>
<tr><td>compliment</td><td>ServiceDesk</td><td>Streamlined Complaint or Compliment</td></tr>
<tr><td>incident</td><td>ServiceDesk</td><td>Streamlined Service Desk</td></tr>
<tr><td>problem</td><td>ServiceDesk</td><td>Streamlined Service Desk</td></tr>
<tr><td>request for administration</td><td>ServiceDesk</td><td>Streamlined Service Desk</td></tr>
<tr><td>request for change</td><td>ServiceDesk</td><td>Streamlined Service Desk</td></tr>
<tr><td>request for information</td><td>ServiceDesk</td><td>Streamlined Service Desk</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>Interaction category</th><th>Associated non-streamlined workflow in SM Codeless</th><th>Associated workflow in streamlined interaction solution</th></tr>
<tr><td>service request</td><td>ServiceDesk</td><td>Streamlined Service Desk</td></tr>
<tr><td>support catalog</td><td>N/A</td><td>Streamlined Service Desk</td></tr>
<tr><td>service catalog</td><td>Service Catalog</td><td>Streamlined Service Catalog</td></tr>
</table>
</td></tr>
<tr><td>Default Category</td><td>The default category when you create a new interaction. The out-of-box value for this parameter is None.

The default category is used when you click Create New Interaction:

◦ If no default category is defined, you are prompted to select a category before the interaction detail screen appears.

◦ If the default category is defined, the interaction detail screen is displayed directly and the Category field is populated with the default category.

Note: The default category does not apply to the ESS requests. For support requests submitted through ESS, interactions are always created in the "incident" category or the category suggested by SM Smart Analytics.</td></tr>
</table>

3. Click **Save**.

Consolidated menu entry for interaction creation

Depending on whether Smart Analytics is enabled and whether the new streamlined interaction solution is used, the menu entries for creating new interactions are different. To learn how the menu entries are consolidated, see the following table:

Smart Analytics	Enable "Create New Interaction" Menu Entry	Consolidated menu entry for interaction creation
Enabled	Checked (to use the original interaction solution as in SM 9.40)	Two menu entries are available: • **Create New Interaction**

Smart Analytics	Enable "Create New Interaction" Menu Entry	Consolidated menu entry for interaction creation
		• **Create Smart Interaction**
Enabled	Unchecked (to use the new streamlined interaction solution)	**Create Smart Interaction**
Disabled	Checked	**Create New Interaction**
Disabled	Unchecked	**Create Streamlined Interaction**

Note: For operators with the "SysAdmin" capability word, all the three menu entries are visible regardless the system setting.

Configure the Service Desk environment

Applies to User Roles:

System Administrator

To configure a Service Desk environment record, follow these steps:

1. Click **Service Desk** > **Administration** > **Environment**.
2. Configure the settings for your Service Desk environment.

   You can use the following table for more information on the options that you can set by selecting or clearing the check box:

Check box	Description
Delay Assigning Interaction ID?	If selected (set to true), prevents HP Service Manager from assigning an identifier to the Interaction immediately. When this option is active, there is no unique identifier to tie an attachment within the file when you first open it. Therefore, you cannot save attachments when you open the ticket. You can add attachments when saving an update after the record has a unique identifier.
User Operator Full Name?	If selected (set to true), uses the operator's Full Name instead of the login ID when time stamping reports (on open, update, and so on) for records in the application environment

   You can use the following table to specify information about the Post Back links:

Post Back Link	Description
IM Post back Link:	The link record used to post information from a related incident to the interaction when the incident is closed.
ChM Post back Link:	The link record used to post information from a related change to the Interaction when the change is closed
RM Post back Link:	The link record used to post information from a related request to the Interaction when the request is closed.
PbM Post back Link:	The link record used to post information from a related problem to the Interaction when the problem is closed.
Copy/Open Link:	The record from which to copy the data. When you copy a record, data from the record specified here is copied to the new record based on the link record.

You can specify information about the Service Desk Manager Email, Service Desk Group, Service Desk Phone Number, and Service Desk Email. These fields are used in notifications and for assigning the interaction to a default group.

Tip: You can use the field help to view the description for each setting. To view the help on field:

- Web client: Select a field, and then press **F1**.
- Windows client: Select a field, and then press **Ctrl+H**.

3. Click **Save**.

Note: If the legacy interaction workflows (not the new streamlined interaction workflows introduced in SM 9.41) are used, you need to manually enable the following settings so that they can take effect:

Setting	Description
Service Desk Record Relationship Models	• **Full Service Desk Model**: In this model, the state of a Service Desk interaction record changes when each related record closes. The closed state of an interaction record depends on the notification value chosen for the "Notify By" field in the interaction record. For example, if the notification value is "Telephone," the interaction record has a required action before it is closed. This action describes

Setting	Description
	why the customer must be contacted. It also prevents the interaction record from closing until all required actions are complete. In this case, the interaction record goes into the Callback state before it is closed. For more information, see Full Service Desk model. • **All Records close Independently**: In this model, all Service Desk interaction records close independently. The state of related records does not affect closing an interaction record, and closing the interaction record does not affect related records. • **Close Interactions when Related Record closes**: In this model, when the last related record closes, the Service Desk interaction record closes. • **Cannot close Related Record until Interactions are closed**: In this model, records related to a Service Desk interaction cannot close until the interaction record is closed. • **Cannot close Interactions until Related Records are closed**: In this model, a Service Desk interaction record cannot close until all related Incident Management records, Change Management records, and Request Management records are closed.
Return to Blank Interaction?	If selected (set to true), returns the user to a blank (new) Interaction screen after the creation of an Incident record. If cleared (set to false), the user will return to the Interaction they created the Incident from.
Post resolution to Interactions?	If selected (set to true), posts the resolution of a closed ticket to the related Interaction report.
Copy Associations of Cloned Interactions?	Copies the associations of a cloned interaction.

Configure status mapping between streamlined interactions and fulfillment records

Applies to User Roles:

System Administrator

In the out-of-box system, the status of a streamlined interaction is dependent on the status of its related fulfillment record. For the out-of-box status mapping rules, see "Interaction status" on page 14. However, you may want to define your own status mapping to meet your business needs. To do this, you can open the status mapping script (StatusSyncServiceConfig), and then modify the configuration item (STATUS_MAPS_STREAMLINED) that defines status mapping between streamlined interactions and fulfillment records.

> **Note:** In the StatusSyncServiceConfig script, you can see two configuration items (STATUS_MAPS_ESCALATION and STATUS_MAPS_STREAMLINED):
>
> - STATUS_MAPS_STREAMLINED is the configuration item that defines the status mapping between the streamlined interactions and the fulfillment records, which have a "Trigger To" or "Fulfillment" relationship.
> - STATUS_MAPS_ESCALATION is the configuration item that defines the status mapping between the non-streamlined interaction and the fulfillment records, which have a "Escalation'" relationship.

To configure status mapping between streamlined interactions and fulfillment records, follow these steps:

1. Click **Tailoring** > **Script Library** in the System Navigator.
2. In the **Name** field, type StatusSyncServiceConfig, and then click **Search**. The detailed script is displayed.
3. Search for and locate the STATUS_MAPS_STREAMLINED configuration item.
4. Modify the codes in STATUS_MAPS_STREAMLINED as needed. The following example defines the status mapping between streamlined interactions and incidents (in a "Trigger To" or "Fulfillment" relationship). See the comments inline for instructions.

```
//The file name of incidents
probsummary: {
        //The status field of incidents
        statusField: "problem.status",
        statusMap: {
            "Pending Customer": {
                status: "Pending Customer",
                priority: 0
            },
```

```
            "Resolved": {
                //When the incident is Resolved, the interaction status changes
to “Resolved” as well.
                status: "Resolved",
                //The status mapping priority.
                priority: 0,
                syncFields: [
                 //Copy the incident resolution to the interaction.
                   {
                    source: "resolution",
                    target: "resolution",
                    override: true
                }]
            }
        },
        //When the request is not in the status mapping above, use the default
status.
        defaultStatus: {
            status: "Dispatched",
            priority: 1
        },
        //When the request is in the ignored status, the system does not
perform status synchronization.
        ignoreStatus: ["Closed"]
    }
```

> **Note:** When an interaction has more than one fulfillment records that need status synchronization, the interaction may be mapped to different statuses. In this case, the status mapping with the highest priority will be used. For the priority number,‘0’ is the highest priority.

5. Click **Save**.

6. From **Miscellaneous** > **System Status**, stop and then restart the "scheduledAction" process.

   The updated status mapping between streamlined interactions and fulfillment records now takes effect.

If you want to modify the STATUS_MAPS_ESCALATION configuration item, you can refer to the following example that defines the status mapping between the non-streamlined interactions and requests, which are in the "Escalation" relationship.

```
//the file name of requests
request: {
        //The status field of requests
        statusField: "status",
```

```
        statusMap: {
            //When the request is fulfilled, the interaction is changed to the
“Resolved” status.
            "Fulfilled": "Resolved",
        }
    }
```

Service Desk configuration

Service Desk configuration enables you to configure alert, interaction categories, workflow, solution matching, and so on.

Create an interaction category 51
Add a new interaction subcategory 54
Add a new interaction area 54

Create an interaction category

Applies to User Roles:

System Administrator

If you are an HP Service Manager administrator, you may want to create new interaction categories. You may want to create a category when you require a different worfklow that specifies unique forms and business rules.

Note: If you do create a new category, you must also add corresponding subcategories and areas.

HP Service Manager provides the following out-of-box category records that you can use or modify:

- complaint
- compliment
- incident
- problem
- request for administration
- request for change
- request for information
- service catalog

- service request
- support catalog

Note: When a category is set as the default category in Settings, do not delete it to avoid unpredictable issues.

Note: The **Allow Escalation** option is not applicable to the streamlined interactions.

To create new interaction category record, follow these steps:

1. Click **Service Desk** > **Configuration** > **Interaction Categories**.
2. Click **New**.
3. Type the name of the category.
4. Specify the **Apply To** option to indicate the modules that can share this category.

   Note: The **Apply To** flag indicates whether the category is shared across different modules. For example, if the **Apply To** is set to "Interaction/Incident", this category will be created in both the interaction category table and the incident category table. Typical shared categories in the out-of-box system include:

   - incident
   - problem
   - request for information
   - support catalog

   For an Interaction Category, the following rule applies:

   - Once a value is specified in the **Apply To** field and the record is saved, the value cannot be modified.

   The **Apply To** options that are used in Interaction Categories include:

- Interaction
- Interaction/Incident
- Interaction/Incident/Problem
- Interaction/Problem

5. Specify whether the category is active.

Note: If the **Active** check box is unchecked, you cannot use this category when creating a new record.

6. Type the category description.
7. Select a workflow for the category.
8. Specify the fulfillment process that is associated with this interaction category. When an interaction record is created in this category, the specified process will be initiated.

Note:

- The following table lists the processes in the out-of-box system and the recommended workflows that you need to specify in step 8.

Fulfillment process	**Workflow**
Incident Management	Streamlined Service Desk
Problem Management	Streamlined Service Desk
Request Fulfillment	Streamlined Service Desk
Change Management	Streamlined Service Desk
Service Desk	Streamlined Complaint or Compliment

- When the fulfillment process is reconfigured for a category, the configuration will take effect after you re-login Service Manager.

9. Click **Save** to view the **Workflow** tab and other associated tabs.

10. Click **Subcategories** tab to create subcategories for the interaction category.
11. Click **Service Desk Approval** tab to configure approval settings.

    Note: The settings in the **Service Desk Approval** tab are only for service catalog approval. That is, in the out-of-box system, they are only valid for the service catalog category.

12. Click **Save**.

Note: The Interaction category name is read-only after the category is created.

Add a new interaction subcategory

Applies to User Roles:

System Administrator

Subcategories are a way to refine a Service Desk category into smaller groups. For example, the complaint category can have service delivery and support subcategories.

To add a subcategory:

1. Click **Service Desk**.
2. Click **Configuration** > **Interaction Categories**.
3. Click **New** to create a new category or click **Search** to select an existing category.
4. In the **Subcategories** section, click the **Link New Subcategories** button.
5. Type a subcategory name.
6. Type a description for the subcategory.
7. Click **Save** to add the new subcategory.

Add a new interaction area

Applies to User Roles:

System Administrator

Areas are a way to further refine a Service Desk subcategory. For example, the support subcategory in the complaint category can have availability, functionality, and performance areas.

To add an area:

1. Click **Service Desk**.
2. Click **Configuration** > **Interaction Categories**.
3. Click **New** to create a new category or click **Search** to select an existing category.
4. In the **Subcategories** section, click the **Link New Subcategories** button to create a new subcategory or select an existing subcategory from the list.
5. In the **Areas** section, click the **Link New Areas** button.
6. Type a name for the area.
7. Type a description for the area.
8. Click **Save** to add the new area.

Security

The topics in this section explain the Service Desk security roles, security areas, and rights.

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Setting rights to interactions

Applies to User Roles:

Service Desk Manager

The Service Desk Manager can set rights to interactions using the role-based security. The Service Desk and Service Desk Configuration areas contain default security rights and settings. The rights are copied to new roles created for these areas. However, the settings are inherited only if there are no settings specified on the roles.

Note: Whenever the roles in an operator record are updated, the operator must log out and then log in for the changes to take effect.

Service Desk security areas

Applies to User Roles:

System Administrator

The security areas for Service Desk are Service Desk and Service Desk Configuration. These areas contain the default security rights and settings for Interactions in the Service Desk module. The security right settings will be inherited by the new roles created in an area when no settings are specified in the security role.

These security areas are used to set permissions to operators to provide access to particular area of Service Desk. For example, for the Service Desk Analyst security role, set rights as **View** for the Service Desk area. Then, an operator with this security role can only view the Service Desk items under Service Desk module. The following table lists the areas and the relevant Service Desk menu items the operators can access.

<table>
<tr><th>Area</th><th>System Navigator menu items for this area</th></tr>
<tr><td>Service Desk</td><td>This area contains the default security rights and settings for Service Desk requests in the Service Desk module.

For example, Create New Interaction, Interaction Queue, and Search Interactions.</td></tr>
<tr><td>Service Desk Configuration</td><td>This area contains the default security rights and settings for Service Desk administration and configuration, which are dedicatedly used by Service Desk module. For example, Settings and Interaction Categories.

Note: When you set the security rights for a security role in the Service Desk Configuration area:
The View right is to view the settings defined in the Administration menu and the Configuration menu.
The Update right is to update the values of existing settings defined in the Administration menu and the Configuration menu.
The New and Delete rights are to create and delete a setting in the Configuration menu, such as category.
The Admin right is to add, edit, or delete the settings in the Administration > Settings menu.</td></tr>
</table>

Default rights

The default rights defined in areas will be inherited when you create new security roles. The following table shows the out-of-box default rights defined in the Service Desk and Service Desk Configuration areas.

Area Name	View	New	Update	Delete/Close	Expert	Admin
Service Desk	TRUE	FALSE	Never	Never	FALSE	FALSE
Service Desk Configuration	FALSE	FALSE	Never	Never	FALSE	FALSE

Default settings

The default settings defined in areas will be inherited when you create new security roles. In an out-of-box system, none of the default settings is checked or set in the Service Desk and Service Desk Configuration areas.

Service Desk security roles and settings

The out-of-box security roles for the Service Desk module include the following:

- service tech
- service desk agent
- service desk analyst
- service desk manager
- self service
- approver
- service desk process owner

Mapping between previous security profiles and current PD security roles

The following table lists the mapping relationship between previous Service Desk security profiles and current PD security roles in the Service Desk module.

Security Profile	Security Role/Area
DEFAULT	DEFAULT/Service Desk
approver	approver/Service Desk
helpdesk tech	helpdesk tech/Service Desk
initiator	initiator/Service Desk
self service	self service/Service Desk
service desk agent	service desk agent/Service Desk
service desk manager	service desk manager/Service Desk
sysadmin	sysadmin/Service Desk
N/A	service desk analyst/service desk process owner/Service Desk

Field mapping between security profiles and PD security rights/settings

The following table lists the mapping of fields in legacy Service Desk security profiles and Process Designer security roles.

Security profile settings	**Process Designer security rights and settings**
New	New
Close	Delete/Close
Update	Update
View	View
Can notify	
Alternate views	
Advanced Search	
Template Mass Update	Expert
Complex Mass Update	
Approval groups	Approval Groups
Allowed Statuses	Allowed Statuses
Can Create Personal Views	Can Create Personal Views
Can Create System Views	Can Create System views
Lock on Display	Lock on Display
Modify Templates	Modify Templates
Delegate Approvals	Can Delegate Approvals
Initial view	Initial View
List Format	List Format
Manage Format	Manage Format
ESS initial format	ESS initial format
ESS edit format	ESS edit format

Security profile settings	Process Designer security rights and settings
ESS search format	ESS search format
ESS list format	ESS list format
Default Template	Default Template
Append query	Append query
New Thread: View -> Search	New Thread: View -> Search
New Thread: Search -> List	New Thread: Search -> List
New Thread: List -> Edit	New Thread: List -> Edit
New Thread: View -> Edit	New Thread: View -> Edit

Out-of-box role rights

Based on the mapping rules, the rights and settings in previous security profiles are mapped to the rights and settings in the Service Desk area specified in the corresponding security roles. See the table below for the out-of-box security rights of the new security roles in the Service Desk area and the Service Desk Configuration area. This table only lists the new security roles that have different settings with the default rights.

Area Name	Role Name	View	New	Update	Delete/Close	Modify Template	Expert	Admin
Service Desk	service desk analyst	TRUE	TRUE	Always	Always	FALSE	TRUE	FALSE
	service desk manager	TRUE	TRUE	Always	Always	TRUE	TRUE	FALSE
	service desk process owner	TRUE	TRUE	Always	Always	TRUE	TRUE	TRUE
	system administrator	TRUE	TRUE	Always	Always	TRUE	TRUE	TRUE
Service Desk Configuration	service desk manager	TRUE	TRUE	Always	Always	FALSE	FALSE	FALSE
	service desk process owner	TRUE	FALSE	Never	Never	FALSE	FALSE	FALSE
	system	TRUE	TRUE	Always	Always	TRUE	TRUE	TRUE

Area Name	Role Name	View	New	Update	Delete/Close	Modify Template	Expert	Admin
	administrator							

For information about the out-of-box role rights in the Common Configuration area, see Out-of-box role rights in the Common Configuration area

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