City of Portland
Bureau of Technology Services
Support Systems & Asset Management

This document provides answers to frequently asked question for ServiceDesk 7.1.

1. Which fields are required to submit an incident?

   a. New Incident form
      i. Title
      ii. Description

   b. Submit Incident (Advanced)
      i. Primary Contact
      ii. Title
      iii. Description
      iv. Classification
      v. Type (required at Resolved)

2. What happens when two people try to work the same incident?
    a. The ticket will be locked. Items under "Other Actions" will be grayed out and a message will show that the ticket has been leased.

3. Can I export a list of tickets to MS Excel from the process manager view? How?
    a. Yes, you can export a list of tickets into MS Excel from Process Manager.
    b. Click the Actions Lightning Bolt in the upper right-hand corner of the report and choose the type of export you wish to use i.e. Export to Excel.
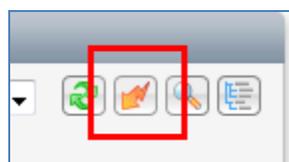
4. Does the "Percent Complete" field automatically change or update as I work on a ticket?
   a. Yes. The ticket will show 10% once it's been created. As the ticket is worked it moves up in percentage. When the ticket has been Resolved it will remain at 90% until it's Closed.

| ID	IM-000431		Percent Completed	10%
Status	Open		Start Date	4/3/2012 1:46:37 PM
Priority	Low		Needed By Date	N/A
Impact	Single User		Follow Up Date	N/A
Urgency	Non-Urgent Service		Escalation Count	0
Location	Location Not Set		Time Spent	00:00:00
Source	General Incident		Submitted By	sd.test2@portlandoregon.gov
Bureau			External ID	

5. How long until a Resolved ticket is closed?
   a. The ticket will close automatically 5 days after it has been resolved unless it's closed manually first.

6. How can a ticket be closed manually after being resolved?
   a. Select "Click here to review and close your incident" under "My Actions" then click the "Issue Resolved" button.

My Actions - (3)

Review Incident: IM-000431
Click here to review and close your incident

Other Actions

Send Email
Manage Equipment
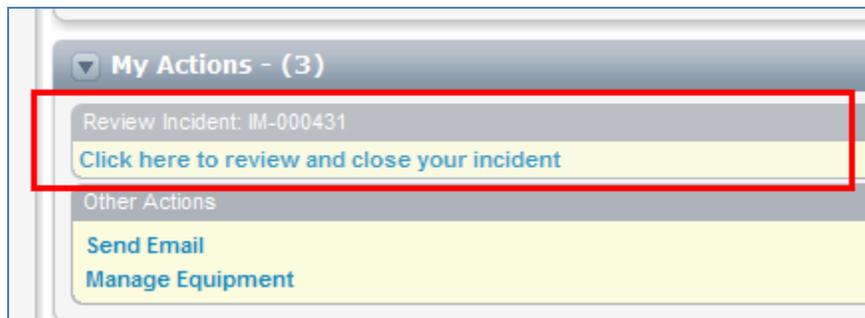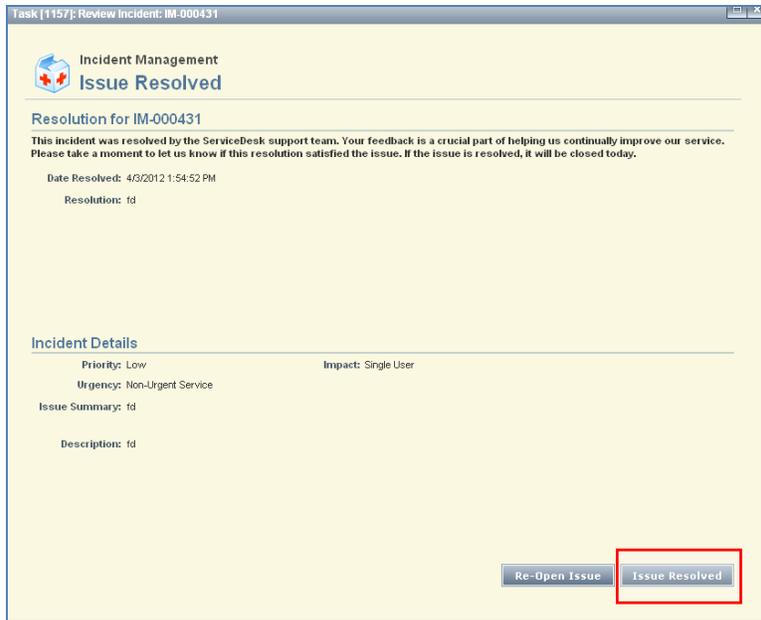
7. How should comments in a ticket be entered?
   a. We recommend using the "Add Comment" link at the top of the ticket.

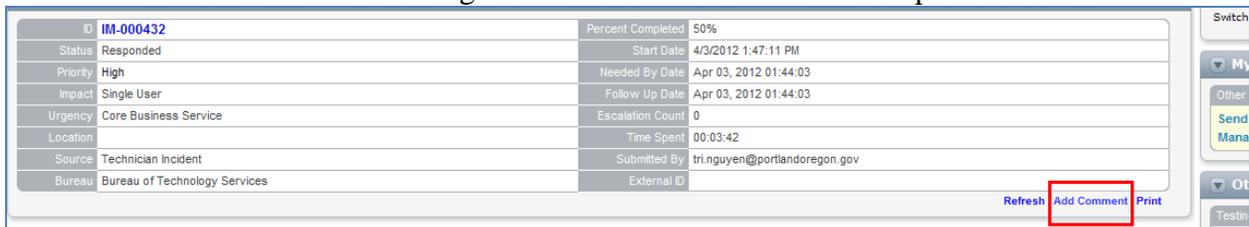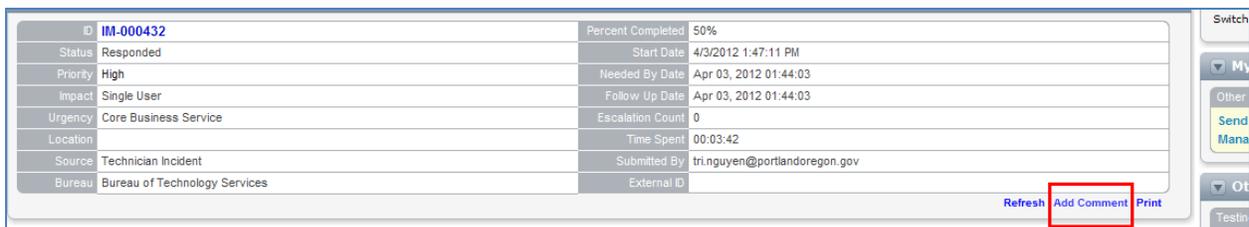   b. This adds the comment to the History section of the ticket.

8. Can you add additional information to resolved ticket?
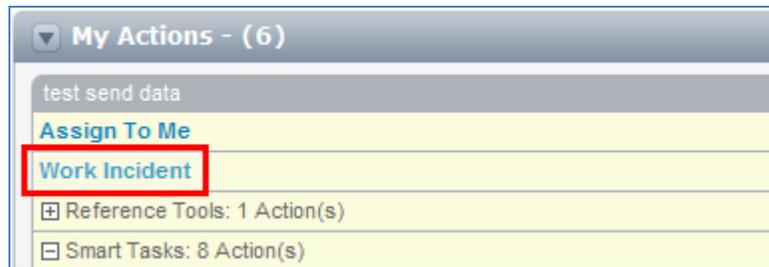   a. Yes. Use the "Add Comment" link at the top of the ticket.

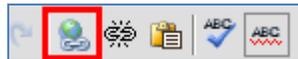9. Can I link a ticket from the Altiris 6.5 Helpdesk in Altiris 7? How?
   a. Yes, you can place hyperlinks inside of the "User Comment".
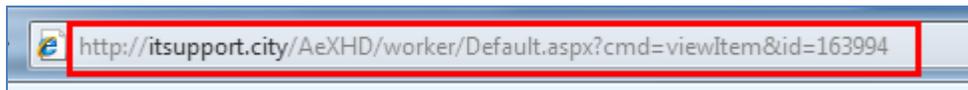   b. Click on Work Incident.

c. Click on the Create Link button located in the Resolution Details section.


d. Open the Altiris 6.5 ticket and copy the URL .

   NOTE* The ticket number should be at the end of the URL address.


e. For the Create Link box enter the following information:
   i. Type: http:
   ii. URL: should be the copied URL from the 6.5 ticket
   iii. Text: will be the name of your link i.e. Altiris 6.5 #163994
   iv. Tooltip: is not necessary, but if you want to put something in this box it will be displayed when the user hovers the mouse over the link you create
   v. Target: _blank (this will force the link to open in a new window)
   vi. Once all fields are filled out click the OK button
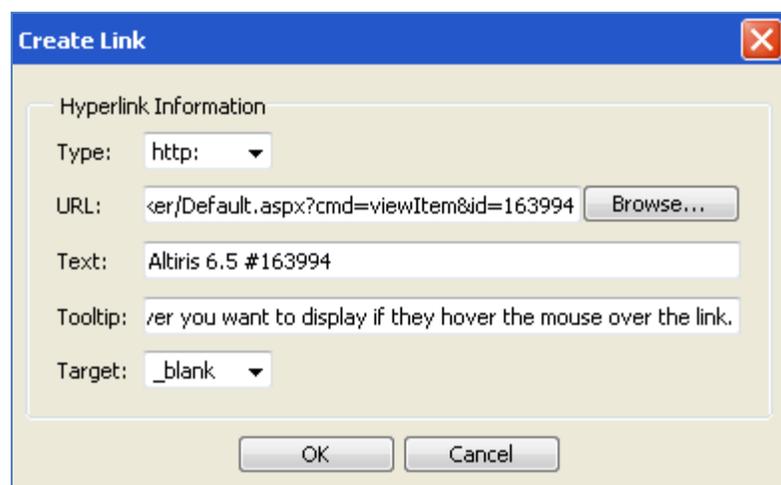
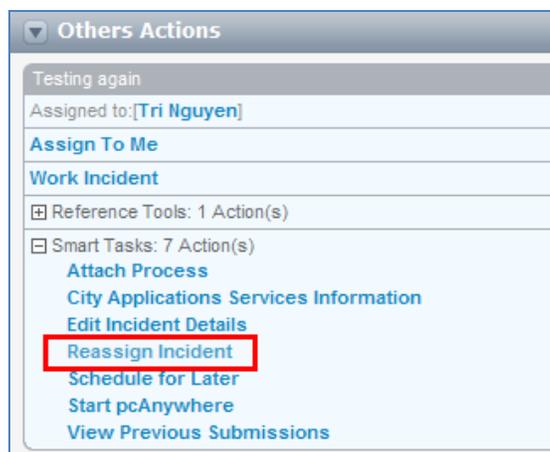f. Your link should now be showing in the Resolution Details section.

Resolution Details

*Close Code:

*Response:

Altiris 6.5 #163994
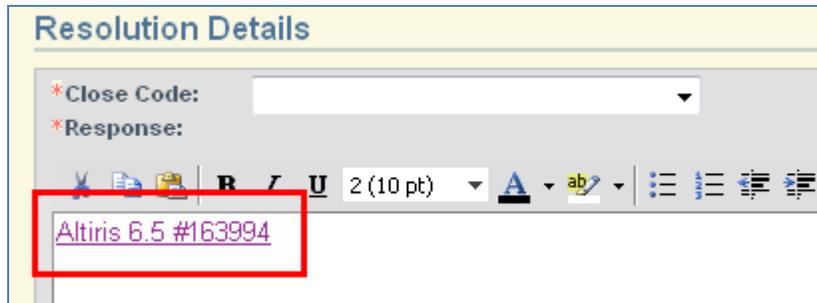
g. Save or Resolve your Incident.
h. Your link will now be available in the History section in the User Comment that was posted.

User Comment: Response Has Been Changed
Response was changed by Robert Klingsporn to Altiris 6.5 #163994

10. If Secondary Contacts do not get notification, what is their use?
    a. No notification is sent to the Secondary contact. Notifications are only sent to the Primary Contact and the Technician or Team assigned the ticket.
    b. Secondary Contacts will have access to tickets they are associated with through their Home page.
    NOTE* Secondary Contacts are not supported at this time and reporting cannot be done based on this field. Using Secondary Contacts will also cause duplicate tickets in team queues.

11. What is the total size limit for attachments in a ticket?
    a. The size limit for attachments is 4MB.

12. When you assign yourself (or assign to my group) do I get an email notification?
    a. Yes, if you use the Reassign Incident Smart Task

▼ Others Actions

Testing again
Assigned to:[Tri Nguyen]
Assign To Me
Work Incident
⊞ Reference Tools: 1 Action(s)
⊟ Smart Tasks: 7 Action(s)
   Attach Process
   City Applications Services Information
   Edit Incident Details
   Reassign Incident
   Schedule for Later
   Start pcAnywhere
   View Previous Submissions

13. Does a Resolved ticket remain in the queue?
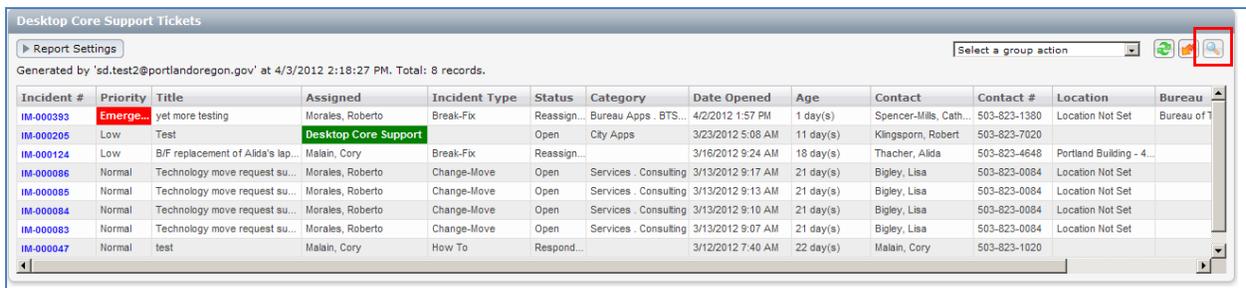   a. Resolved tickets will remain in My Task List but not in the team's queues

14. In Process Manager view, can I filter tickets just to view only tickets assigned to me and not the entire group?
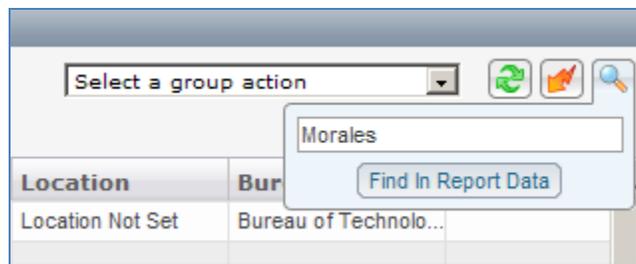   a. Yes. Choose the magnifying glass in the upper right of the team's queue

    b. Type your name and select "Find in Report Data"

    c. The queue should now show tickets assigned to you.

NOTE* This will also show tickets if you are the Contact

15. Where can I find the Contact's Bureau/Location/Department information?
    a. Bureau and Department information will show on the Submit Incident (Advanced) ticket during creation after a Primary Contact is selected.
    b. Location information must be selected manually from the Location dropdown box

c. Once the ticket has been created, Bureau and Location information will show in the incident details

d. More Contact information can be found in the "All Contacts" section of the ticket

e. Bureau/Location/Department information is also included in the team's queue

16. Will I be able to remote to a Windows 7 computer from a Windows XP computer?   Home
   a. Yes. Choose "Start pcAnywhere" from the Smart Task list

   b. Search for computer or choose computer already associated with the ticket. Click "Start pcAnywhere"

   c. Choose Tasks from the Menu Bar at the top of the page in Resource Manager and select Remote Control

17. Can I make Comments in tickets "Private"?
    a. Yes, but this should not be used. Choose Private from the View Level field when creating a comment.

18. Is the Chat function available for use?
    a. The Chat function is not being supported at this time.

19. How do I link tickets in Altiris 7?
    a. Choose "Attach Process" from the Smart Tasks section of the incident
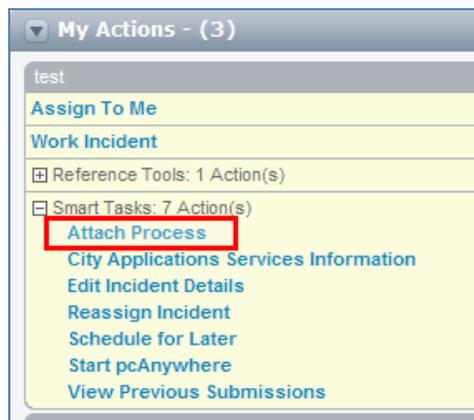
    b. Search for the ticket or choose one from the "Recent Entries" section. Select the ticket and choose "Save."
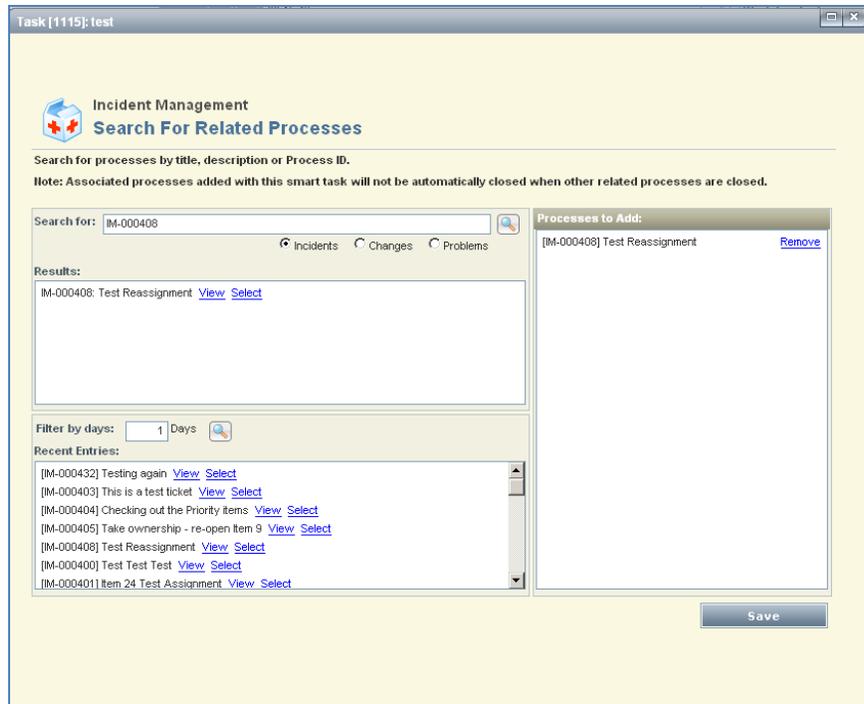
20. Can I view tickets that originally come into my group and are re-assigned to another group?
    a. Yes. Choose the group from the drop down list in the Tickets menu
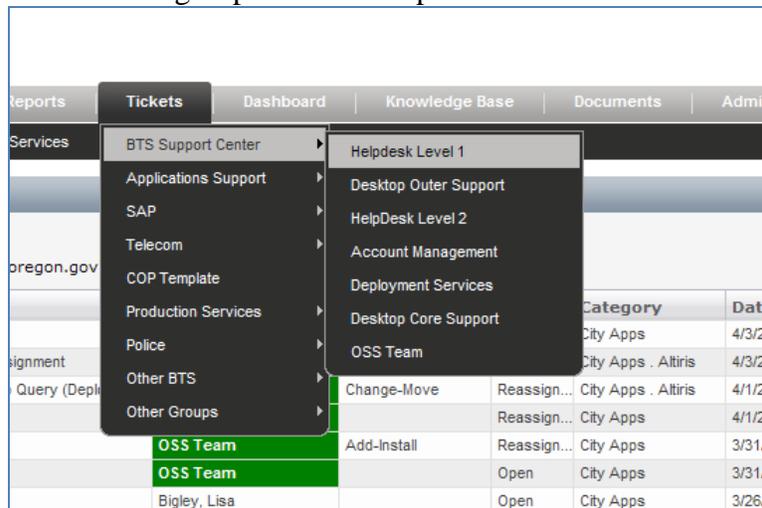
21. How can I work a ticket that is assigned to another person or team?
    a. Open the ticket and choose "Work Tasks Assigned to Others" from the "My Actions" section
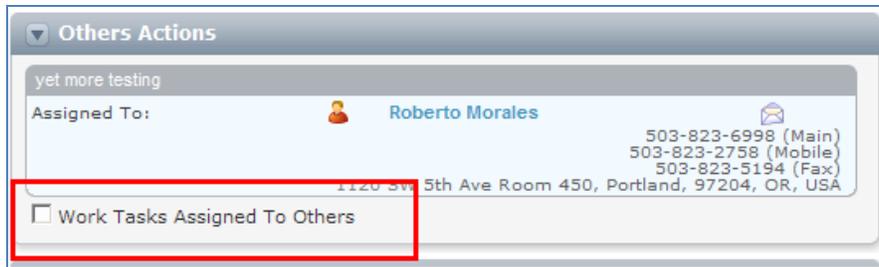
22. How can I reassign a ticket that is assigned to another person or team?
    a. Open the ticket and choose "Work Tasks Assigned to Others" from the "My Actions" section

    b. Choose either "Assign to Me" or "Reassign Incident" from the "My Actions" section of the ticket
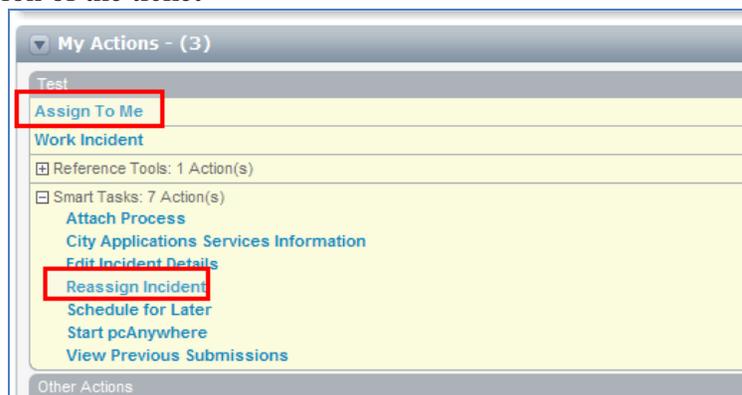
23. How do you embed an image within comments?
    a. Images must be attached using the "Add Attachments" option in the "Documents" section

24. Do you have to authenticate using pcAnywhere? Can credentials be passed from the currently logged on person?
    a. You must type in credentials when connecting to a remote computer using pcAnywhere

25. How do you email a link to the ticket?
    a. Use the Send Email link located in the "Other Actions" section

26. Can you change the phone number in an incident?
    a. Altiris pulls phone number information for customers from Active Directory. Have Account Managers correct the information in AD or add the phone number to the Comments area.

27. Does the system have a way of addressing the need to notify more than one person when an incident is created?
    a. No. You can add a "secondary contact," but only the primary contact is notified.

28. Are templates the same as Quick Incidents?
    a. Mostly. Templates in ServiceDesk do not have subtasks associated with them

29. Is it possible to assign multiple people or groups to a ticket?
    a. Yes, but it will cause problems with reporting and multiple tickets will show in team queues. We ask that this feature not be used at this time.

30. Can closed tickets be reopened?
    a. No. You can choose to "re-open" a ticket that is in "Resolved" status but the ticket is not actually re-opened. Instead, a new ticket is created with the details from the original ticket included and the original ticket is closed. Tickets in "Closed" status cannot be re-opened at all.

31. Can a computer be added to a ticket after it's been created?
    a. Yes. Choose "Manage Equipment" from the "Other Actions" section of the ticket

    b. Search for the computer name, click "Add" then "Save"
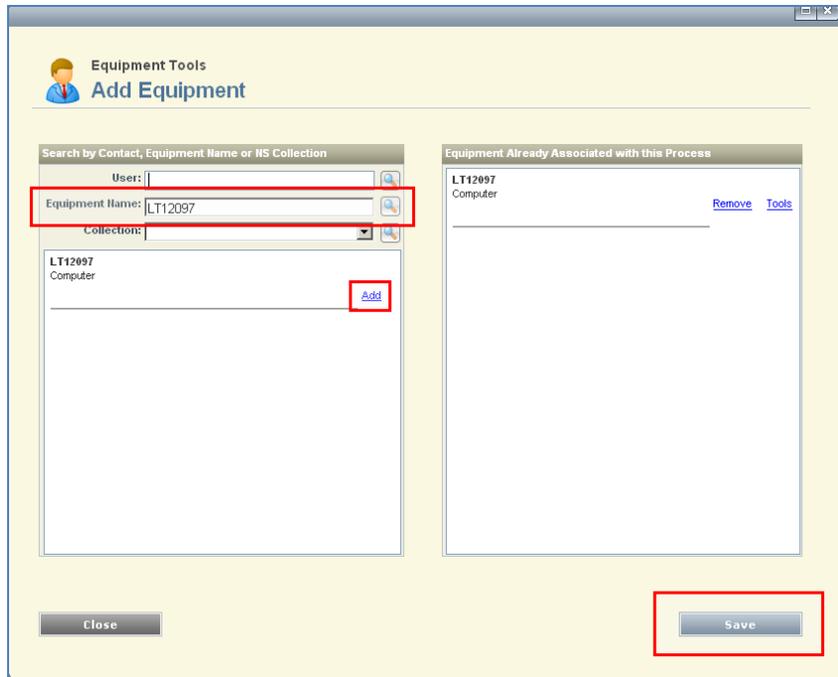
32. How can computer information be accessed in Resource Manager?

    a.   From Submit Incident (Advanced), click the "View" link in the "Equipment" section

    b.   From within a ticket, click the computer link in the "Related Items" section

    c.   Then choose "Open Resource Manager"

Equipment Tools
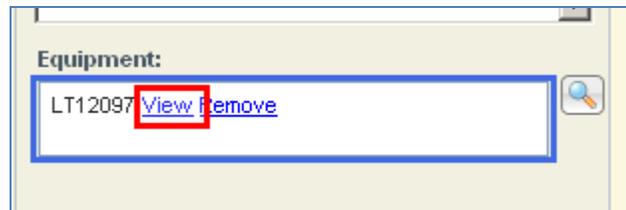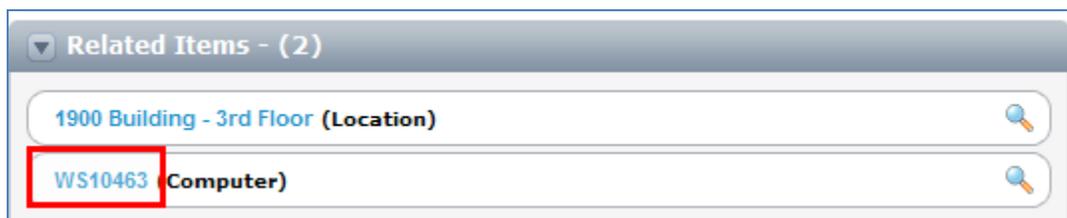**Quick Tools for: LT12097**

To use PC Anywhere, click on the Open Resource Manager link. This will open the computer in the SMP's Resource page. On the panel in the left side, click on More Actions. Select Remote Management>PC Anywhere>Remote Control.

Tools

Edit Resource

Open Resource Manager

RAD (Association Diagram)

Equipment Details

Name:	LT12097
Equipment Type:	ComputerResource
Description:	Computer

33. Incident Lease Time

    a. Does the lease time out if someone leaves a ticket open?

        i. Yes, the on-click event is timed from the moment the individual clicks the link.

    b. If so, how long before it closes?

        i. The lease is released 15 minutes after the on-click event takes place.

    c. The following on-click events will result in the incident being leased:

        i. Assign To Me
        ii. Work Incident
        iii. Smart Tasks:

            1. Attach Process
            2. City Applications Services Information
            3. Edit Incident Details
            4. Reassign Incident
            5. Schedule for Later
            6. Start pcAnywhere
            7. View Previous Submissions

34. How can category be changed after the ticket has been created?
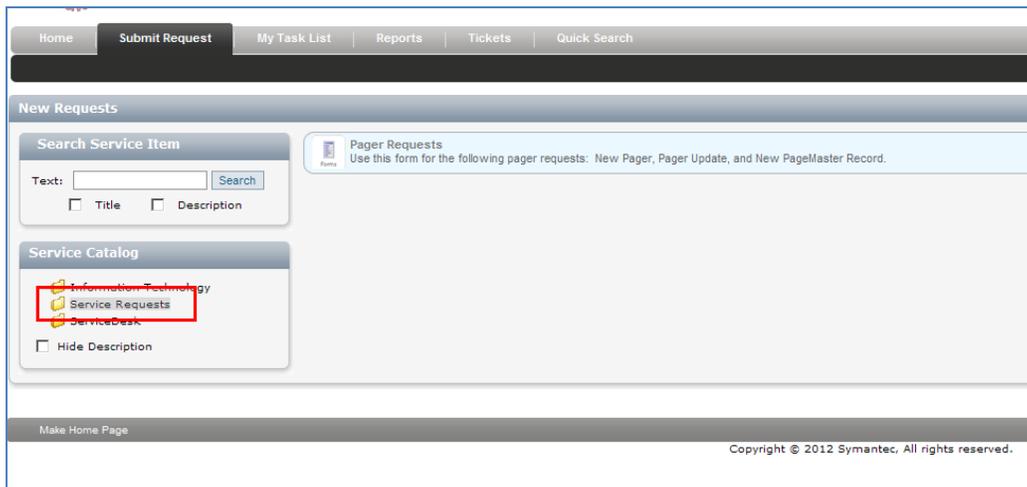   a. Choose "Work Incident" and modify the Classification
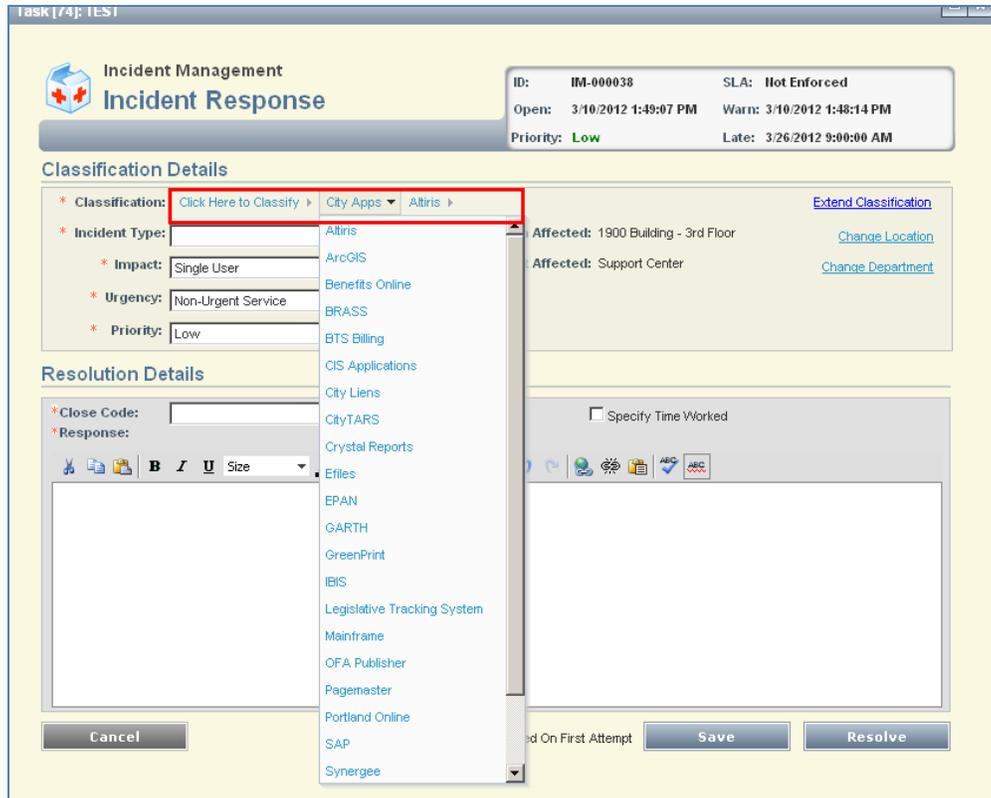
35. Where are custom forms located?

    a. In the "Service Requests" folder on the "Submit Request" page

36. Why are there duplicate entries for the same ticket in my team queue?

    a. Duplicate tickets will show if there is more than one Primary Contact. To remove the duplication, open the ticket and click the red X next to one of the contacts to delete.

NOTE* Secondary Contacts are added automatically when a ticket is re-opened