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1 PURPOSE OF DOCUMENT

The purpose of this document is to provide basic training on how to log and update calls using the CA Service Desk Manager Web interface.
2 CERTIFIED BROWSERS

One of the following certified browsers is required for access to the system:

- Microsoft Internet Explorer 9 (on Windows only)
  
  Note: CA Business Intelligence 3.2 is not supported on Microsoft Internet Explorer 9

- Microsoft Internet Explorer 8 (on Windows only)
  
  Note: A minimum of 2GB of memory and a dual-core processor is recommended to run Microsoft Internet Explorer 8

- Mozilla Firefox 7
- Mozilla Firefox 6
- Mozilla Firefox 5
- Mozilla Firefox 4
- Mozilla Firefox 3

Note: Microsoft Internet Explorer 7 is not recommended for use with CA Service Desk Manager 12.6 due to known performance issues. For more information, please refer to the Appendix A for more information.

Note: The native Analyst PDA interface is designed to work with any browser that supports basic HTML. CA does not conduct platform-specific or device-specific testing.
3 DISCLAIMER

3.1 Not all new features are listed in the “What is new in SDM R12.6?” section. Only the most commonly used features are listed.

3.2 Please note that screens may differ depending upon the configuration for YOUR environment.

3.3 This document only covers functionality currently used in the system.
4  NEED HELP?

In case of any queries and/or problems, contact HP Enterprise Services
Service Desk Support Team on the +27 11 17 3423 or +27 11 173452
5 BASIC CASE FLOW

The typical case (incident, request, problems) process can be depicted as follow:
6 **NEW** WHAT IS NEW IN SDM R12.6?

6.1 SORT COLUMNS & ITEMS IN LISTS

You can control how the columns display on some of the list pages. You can choose which column to use to sort the displayed data, and the order in which the data is sorted.

An up and down arrow next to the column heading, which represents ascending and descending sort order denotes the columns that you can sort. The arrow representing the current sort order appears shaded. If no arrows are shaded, the column is not used for the sort order.

To change the sort order, click the column name heading you want to use for sorting, for example, Request#. The list is sorted by the selected column.

To change the direction of the sort order, click the heading of the column currently used for sorting. If the current sort order is descending, it is changed to ascending. If the current sort order is ascending, it is changed to descending.

6.2 NESTED TABS

All tabs have now been categorised with sub-categories within each tab making it easier for the analyst to find information.

6.3 LOOK AHEAD TYPE

As you start to type in a particular field, the system looks up the values that matches the criteria and enables you to quickly select a record from the drop down list without having to go into a search screen.

The look ahead is available on most of the lookup fields.

The minimum number of characters to be keyed in the lookups before search as you type or autosuggest displays suggestion at this stage is 3. This is a global system setting and can only be changed if the majority of customers agree.

6.4 SIMPLIFIED SUMMARY VIEWS ON LIST SCREENS
Lists screens have all been simplified making it easier to search for a particular case.

You can expand upon an item to see if it is the case you are looking for by clicking on the + sign for the particular record. This will show you more detail on the record you have selected. Click on the – sign to collapse the record again.

6.5 **EXPORT FUNCTION**

The export function on all the lists screens allows you to export data from the list screen directly into MS Excel. Refer to “12 DATA” for more detail on the export function.
6.6 POPUP VIEWS

You can also hover over a record to quickly see the details for the record. The delay between hovering the mouse cursor over a link and the display of the Mouse over Preview at this stage is 1000 milliseconds. This however is a global setting and can only be changed if the majority of clients need the time to be changed.

6.7 MANUAL NOTIFICATIONS TO SMTP EMAIL ADDRESSES

Another new feature is the option for manual notifications to be sent to manually entered SMTP email address, rather than to registered SDM contacts only.

Refer to “9.3.5 SENDING MANUAL NOTIFICATIONS FROM A CALL” for more information on how to send a manual notification to a non-SDM contact.

6.8 PRIORITY CALCULATION

The priority of a new incidents and problems is now calculated by the system based on the mainly the urgency and the impact of the case. This will not affect the existing service type rules (escalations and notifications).

Upon logging of new incidents or problems the system will default the value of the impact and urgency to a 3. It is the responsibility of the agent to update these fields for the appropriate values.

The DEFAULT priority calculation matrix is as follow. Note that this can be changed per tenant (client):

<table>
<thead>
<tr>
<th>Impact</th>
<th>5</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
<th>&lt;empty&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>1-HIGH</td>
<td>1-HIGH</td>
<td>2-MED-HIGH</td>
<td>3-MEDIUM</td>
<td>3-MEDIUM</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>1-HIGH</td>
<td>2-MED-HIGH</td>
<td>3-MEDIUM</td>
<td>3-MEDIUM</td>
<td>4-MED-LOW</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>2-MED-HIGH</td>
<td>3-MEDIUM</td>
<td>3-MEDIUM</td>
<td>4-MED-LOW</td>
<td>4-MED-LOW</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>3-MEDIUM</td>
<td>3-MEDIUM</td>
<td>3-MEDIUM</td>
<td>4-MED-LOW</td>
<td>4-MED-LOW</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>3-MEDIUM</td>
<td>4-MED-LOW</td>
<td>4-MED-LOW</td>
<td>5-LOW</td>
<td>5-LOW</td>
</tr>
<tr>
<td>None</td>
<td></td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>&lt;empty&gt;</td>
<td></td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

Other priority calculations options also taken into consideration upon calculating of the incident or problem’s priority are:

Override Impact YES Override the ticket's Impact with the Impact of the attached Affected Service.
### 6.9 STATUS TRANSITIONS

Status transitions control how you can select the next available status for an incident, request, problem, issue or change order. Transitions let you define a subset of the full status list and specify the default new (or next) status of a case based on the current status. Transitions can also be dependent on a specific control, e.g. when you change the status of a request from “OPEN” to “AWAITING 3RD PARTY” you have to enter the external reference of the 3rd party on the case. Another type of restriction on a new status is to enforce comments on the new status update, e.g. when you change the status of a request from “OPEN” to “FIXED (RESOLVED)” you will not be able to perform the activity unless you put in a resolution explaining to the user what you have done to resolve his/her call.

Refer to “9.3.3 UPDATING THE STATUS OF A CALL” for more information on how to use status transitions.

### 6.10 IDENTIFYING VIP CALLS

Special handling types that identify contacts who require special attention can now be created in the system. This will enable you as the user to see in the list screen, what calls are for users with special handling types. See the siren icon next to the call number.

As soon as you go into the call, you will see the special handling type description as well as the contact’s remarks highlighted at the top of your screen.

### 6.11 INTRODUCTION OF RESOLUTION CODES, RESOLUTION METHODS, SYMPTOMS AND ROOT CAUSES

Please note that the root cause is not available on REQUESTS anymore. The resolution code and resolution method fields are now available on the request forms.
On the INCIDENT forms, the root cause has also been removed and replaced with the symptom field. The resolution code and resolution method fields are now also available on the incident forms:

Note that as part of the upgrade, all the root causes used on requests at the moment, will be extracted and loaded as symptoms in the new Service Desk Manager 12.6 system.

The root cause is now only available on the PROBLEM forms.

6.12 SERVICE OUTAGE

In order to assist the incident manager in his daily duties, the following fields have been added to the INCIDENT form:

- Start Time
- End Time
- Type of outage, e.g. application, network, operational, etc.
- Return to Service indicator
- Percent of Service Restored
- Reason
- Who
- What
- Why

Refer to “9.1.6 **NEW** UPDATE SERVICE OUTAGES” for more detail.
6.13 OTHER NEW FIELDS AVAILABLE

Apart from the new fields in 6.11 and 6.12, the following new fields are also available:

**REQUESTS:**
- **Causes by Change Order**: Specifies the change order number when the Incident ticket is the result of changes implemented from a change order.
- **External System Ticket**: Specifies an identification for a ticket that belongs to an external system that integrates with CA Service Desk Manager. This field stores hyperlinks and displays functional links in read-only mode.
  
  **Note**: The (External Reference) field stores the existing external reference number.

**INCIDENTS:**
- **Major Incident**: Specifies that the incident is major or significant. Because of its importance, changes to this value on a ticket generate an activity log entry.
  
  **Note**: When you copy an incident, the value of this field is cleared. In addition, related tickets (child incidents) do not include the Major Incident value.
- **External System Ticket**: Specifies an identification for a ticket that belongs to an external system that integrates with CA Service Desk Manager. This field stores hyperlinks and displays functional links in read-only mode.
  
  **Note**: The (External Reference) field stores the existing external reference number.
- **Causes by Change Order**: Specifies the change order number when the Incident ticket is the result of changes implemented from a change order.
- **Affected Service**: Specifies the primary service that affects the problem or incident. The CIs of type Service have a class defined in the Enterprise Service Family field. The ticket stores the currently affected service information in the ticket for reporting. You can enter a value directly or click the magnifier to search for a CI.

**PROBLEMS:**
- **Causes by Change Order**: Specifies the change order number when the Incident ticket is the result of changes implemented from a change order.
- **Affected Service**: Specifies the primary service that affects the problem or incident. The CIs of type Service have a class defined in the Enterprise Service Family field. The ticket stores the currently affected service information in the ticket for reporting. You can enter a value directly or click the magnifier to search for a CI.
- **External System Ticket**: Specifies an identification for a ticket that belongs to an external system that integrates with CA Service Desk Manager. This field stores hyperlinks and displays functional links in read-only mode.
  
  **Note**: The (External Reference) field stores the existing external reference number.
7  ACCESSING THE SYSTEM

The CA Service Desk Manager system can be accessed from your Internet Browser using the following url:

http://zaservicedesk.za.eds.com:8080/CAisd/pdmweb_d1.exe

It is recommended that you either create a shortcut to this link on your desktop or add it to your favourites in your Internet Browser.

Type in your Service Desk userid and password and click on “Log In”.

Please note that you will not be able to logon if your password is not in the correct case!
8 NAVIGATING THROUGH THE SYSTEM

8.1 SETUP OF THE SCREEN

After you have logged on to the system, you will be presented with the Main Service Desk screen:

This window contains the following tabs:

- **Service Desk** - The Service Desk tab is the interface used to log, update and query calls/changes.
- **Knowledge** - The Knowledgebase tab is the main interface from which to access documents in the knowledgebase.
- **Administration** - The Administration tab is the interface used by system and knowledgebase administrators to perform configuration functions.

The main Service Desk windows is divided into two panes: the left pane displays the **scoreboard**, a tree-like structure showing the requests, change orders, issues, callbacks, and tasks assigned to you, as well as the items organized by priority; the right pane acts as a **list area**, displaying different types of data depending on your latest selection, a **search area** (if applicable), and the **main menu**.

- **SCOREBOARD** - By default the scoreboard shows the number of requests, change orders, issues, callbacks, and tasks assigned to you (or perhaps to your group, depending on how your system administrator has set up your system). You can also view your assigned and unassigned requests, change orders, and issues by priority. To view a list of any of the categories displayed in the scoreboard, click the category, and a summary of the items in that category appears in the list area.

To update the counts that are currently displayed in the scoreboard, click **Update Counts**.

The scoreboard also allows you to view a real time volume of service desk transactions through the Unicenter Service Desk instant graphing capability. Select the Graph Items or Graph Folders options, when hovering over a folder or subfolder in the scoreboard, to display a variety of useful graphic forms.

**Tip:** You can customize the scoreboard by choosing **Customize Scoreboard** from the File menu and working in the Customize Scoreboard window.

- **LIST AREA** - The list area displays different information depending on your latest selection. For example, if you select the Today’s Tasks category in the scoreboard, it displays all of the workflow tasks assigned to the logged in user. If you choose a command from the Search menu, it displays a search window that features various fields to let you search for a specific database record.
All List windows are divided into two distinct areas: the list area and search area. How you display the various List windows determines whether the list area or search area displays initially.

For example, if you select a request category in the scoreboard, the Request List window displays the list area, showing a list of requests for which the search criteria have already been specified. If you choose Requests from the Search menu, the Request Search window initially displays with the search area visible. This allows you to enter your own search criteria for the list. You can also display the search area from the list area by clicking Show Filter.

Once the search is complete, an appropriate list of items is displayed in the list area.

- **SEARCH AREA** - The search area lets you apply a filter to the list area. You open and close this area by clicking the “Show/Hide Filter” button. When the search area is open, it displays the various fields to enter search criteria. The available fields in the search area will vary depending upon what type of List window is displayed.

- **MAIN MENU** - Aside from the menus and commands listed below, the Unicenter Service Desk menu bar also offers you a way to display the detail window of a specific record, for example a request, change, issue, etc. Choose the record type from the drop-down list and enter the record number or other identifying factor for record you wish to view in the adjacent field. Click Go and any corresponding record detail window will display.

### 8.2 INTERPRETING ICONS/FIELDS

How do I interpret the icons and colours of the fields/labels?

- **Asterisk (*)**
  - Asterisk before the name of that the field you are working with is MANDATORY.
- **Black Labels**
  - Black labels indicate that the field you are working with is an OPTIONAL field.
- **Grey Labels**
  - Grey labels indicate that the field you are working with is a READ-ONLY field which cannot be updated by you.
  - The magnifying glass indicates that the data for the specific field can be selected from a lookup form.
  - The plus sign indicates that the data for the specific field can be selected from a lookup form.
  - By clicking on the date-helper icon next to the label of the field, a calendar will open from which the date can be selected. If you click on the down arrow next to the `<empty>` value in the date field, you will be prompted with the following options:
    - In one day – selecting this value will populate this field with the day after today
    - In two days – selecting this value will populate this field with today plus two days
    - In one week – selecting this value will populate this field with one week from today
    - Other – selecting this value will open up the calendar from where the date can be selected.
- **<empty> ▼**
- **More...**
- **Less...**
- **This icon indicates that the specific activity is an internal log generated by the system.**
The up and down arrows next to a column heading indicates that the column can be sorted in ascending or descending mode.

(T) Indicates an attribute that is tenant-implies; that is a lookup to a tenant-required table.

(TO) Indicates an attribute that is optionally tenant implying that is, a lookup to a tenant-optional table.

Clicking on this button on any of the list screens, will take you to the last page of the records you have selected to search for.

Clicking on this button on any of the list screens, will take you to the next page of the records you have selected to search for.

Clicking on this button on any of the list screens, will take you to the first page of the records you have selected to search for.

Clicking on this button on any of the list screens, will take you to the previous page of the records you have selected to search for.

Selecting this option will display all the records you have selected in one list screen and not over several pages. The maximum number of records to display in one list however is 500.

Selecting this option will expand to reveal nested folders for the records in the list screen.

Selecting this option will close all the previously expanded folders on the screen.

Expand the nested folder for the specific record.

Collapse the nested folder for the specific record.
9 CALL MANAGEMENT

9.1 LOGGING A NEW CALL

From the File menu, select the type of call you wish to create.

A blank call screen will open:

Important Notes:
- An Asterisk (*) after the field name indicates required fields.
- Yellow highlighting indicates the currently selected field.

A call is made up of the following sections:
- Call header detail
- Detail section
- Summary Information section
- Other information
- Tabs

The system will immediately allocate a unique number to the call. If you cancel the call without saving it, this number will not be reused.

Based on the type of call that is created some labels may differ, e.g. Request Area will become Incident Area if New Incident has been selected.
9.1.1 POPULATING THE CALL HEADER SECTION

On the header detail of the call the following data appears:

**Type**
This is the type of call that is being logged. If the incorrect type was selected initially, it can be corrected by selecting the appropriate type from the dropdown box.

**Affected End-User**
This is the person who is experiencing the problem, requested work from a support team.

**Prime Reporter**
This is the person who is reporting the problem/request on behalf of somebody else, e.g. the secretary of the director.

**Requestor**
Specifies the name of the person who initiated the ticket.

**Call Area**
The correct call area should be selected based on the problem described by the user. By default when you select a request area, the assignee, group and service type fields will be populated. Do not overwrite these defaults unless you are 100% sure that the call must be assigned to a person/group other than the defaults. It is the responsibility of the helpdesk/hotseat for the specific environment to transfer the call to an available engineer.

**Status**
The default status of all new calls is “OPEN”. Do not change this upon call logging.

**Priority**
Refer to “6.8 PRIORITY CALCULATION”.

9.1.2 POPULATING THE CALL DETAIL SECTION

**NEW** Refer to “6.11 INTRODUCTION OF RESOLUTION CODES, RESOLUTION METHODS, SYMPTOMS AND ROOT CAUSES” for when to use resolutions codes, symptoms, resolution methods and root causes.

INCIDENT DETAIL SCREEN:

**NEW** Refer to “6.11 INTRODUCTION OF RESOLUTION CODES, RESOLUTION METHODS, SYMPTOMS AND ROOT CAUSES” for when to use resolutions codes, symptoms, resolution methods and root causes.
REQUEST DETAIL SCREEN:

Reported By
ServiceDesk
Assignee *
Group (T)
Configuration Item *
Charge Back ID
Change (T)
Cause by Change Order (T)

PROBLEM DETAIL SCREEN:

Reported By
ServiceDesk
Assignee *
Group (T)
Affected Service (T)
Charge Back ID
Change (T)
Cause by Change Order (T)

The call detail section consists of the following fields:

Reported By
Read-only field indicating the persons who entered the call into the system.

Assignee *
By default the logged on person will be the assignee of the call however the default assignee and group of the category will overwrite the assignee if setup correctly.

Group
The group will be set according to the defaults of the call area.

Configuration Item *
The hardware, software, or service affected by the record, e.g. file server ABC, system DEF, etc.

Severity
The system is configured to set the priority as part of the service type events.

Urgency
This field can be used by the team leader/assignee to indicate the urgency of the call. The assignee can then manage his/her calls according to the urgency of the call.

Impact
This field can be used by the team leader/assignee to indicate the impact of the call. The assignee can then manage his/her calls according to the impact of the call.

Active?
Read-only field indicating if the call is in an active state or not.

Charge Back ID
Indicates the date and time that you are supposed to make a follow-up call on this issue. You can edit the date and time shown to specify when to call back. Use these fields when you need to remind yourself to make a call regarding an issue. On the date you specify, the issue displays on your scoreboard under the “Today’s Calls Callbacks” category.

Call Back Date/Time
This field identifies the ID that is charged for service.

Resolution Code
**NEW** Indicates what the analyst did to resolve an incident or request. Resolution codes specify the general resolution of the ticket, for example, an Applied Patch resolution code indicates that the analyst used a software patch to address an incident.

Resolution Method
**NEW** Indicates how an analyst implemented the resolution. For example, a Chat Session resolution method indicates that an analyst used a chat session to address an incident.

Change
The change field will be populated if a change is logged from the call by clicking on the “Create Change Order” button. You can use the lookup to search for the change you want to link to the call.

Caused by Change Order
**NEW** Specifies only tickets that were opened as a result of a specific change order ticket. You can enter a value directly or click the magnifier to search for a change order.
### External Reference
The external reference field is used to indicate the reference number of an external system, e.g. Heat, Remedy, etc.

### 9.1.3 POPULATING THE CALL SUMMARY INFORMATION SECTION

The call summary section consists of the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary</td>
<td>Enter an abbreviated description of the call. This field is displayed on most of the reports and notifications. Please ensure that you use proper summary descriptions for your calls.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a detail description for the call. If you copy and paste from an email into a call, please ensure that you remove all signatures and unnecessary blank lines.</td>
</tr>
<tr>
<td>Timer</td>
<td>Read-only field specifying the time that has elapsed since the call window has been opened.</td>
</tr>
<tr>
<td>Spelling</td>
<td>This button checks the spelling of text fields, such as description fields. If no spelling errors are found in the field being spell checked, a dialog appears indicating the spell check is complete. If spelling errors are found in the text, the Spell Check Results window appears, allowing you to accept or ignore the spelling suggestions for the words that are highlighted. When you have finished with the Spell Check Results window, click the Close button.</td>
</tr>
</tbody>
</table>

Other fields which form part of the summary information section of a case are:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>The due date is used to indicate when a service is expected to be completed.</td>
</tr>
<tr>
<td>Scheduled Start Date</td>
<td>Specifies the start date and time. This field is optional, but must contain a date value if the Schedule Duration field contains a date value.</td>
</tr>
<tr>
<td>Scheduled End Date</td>
<td>Specifies the end date and time. This field is optional, but must contain a date value if the Schedule Duration field contains a date value.</td>
</tr>
<tr>
<td>Request Sequence #</td>
<td>Sequence numbers define the format for your ticket numbering scheme. You can modify the predefined sequence number formats, but you cannot create new ones.</td>
</tr>
<tr>
<td>Request Estimate (Days)</td>
<td>This field indicates the estimated number of days that it will take to resolve the ticket.</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Development Request</td>
<td>Indicates if the request will require development.</td>
</tr>
<tr>
<td>1st Line Support?</td>
<td>Indicates if this is a 1st line support call.</td>
</tr>
<tr>
<td>Remotely Fixed?</td>
<td>Indicates if the call was remotely fixed using a tool whereby the assignee took over the affected end-user’s workstation to resolve the issue.</td>
</tr>
<tr>
<td>Call Out?</td>
<td>Indicates if this was a call-out call.</td>
</tr>
<tr>
<td>Downtime?</td>
<td>Indicates if there was any downtime involved in the duration of this call.</td>
</tr>
<tr>
<td>Security Impact</td>
<td>Indicates if there is an impact on the security environment. Whenever this indicator is selected, the security officer of the organization will get an automated notification.</td>
</tr>
<tr>
<td>IMACD 1-5</td>
<td>IMACD calls where the equipment involved are between 1 and 5.</td>
</tr>
<tr>
<td>IMACD 6-10</td>
<td>IMACD calls where the equipment involved are between 6 and 10.</td>
</tr>
<tr>
<td>IMACD 10+ (Due Date Required)</td>
<td>IMACD calls where the equipment involved are more than 10. Usually where more than 10 items are involved on a call, the call will be handled as a project upon which the service type will be based on a due date and not a specific target time as in the case of IMACD 1-5 and IMACD 6-10.</td>
</tr>
<tr>
<td>Order Number</td>
<td>This field can be used to indicate the order number in case of procurement type of calls.</td>
</tr>
<tr>
<td>Service DOWN Date/Time</td>
<td>In some cases a call is only logged after the actual service went down. The service down date/time should then be used to indicate the actual date/time the service went down.</td>
</tr>
<tr>
<td>Service UP Date/Time</td>
<td>In most cases problems are resolved before the call is resolved in the system. The service up date/time is then used to capture the actual time the service was restored.</td>
</tr>
<tr>
<td>Customer Satisfaction</td>
<td>Surveys can be used to determine the customer satisfaction rating. Where surveys are not used a call can be rated by the affected end-user replying to the resolved-notification how they rate the call. The ratings are:</td>
</tr>
<tr>
<td></td>
<td>• Poor (in which case the affected end-user must provide a reason which will be captured by the Service Desk agent)</td>
</tr>
<tr>
<td></td>
<td>• Average</td>
</tr>
<tr>
<td></td>
<td>• Good</td>
</tr>
<tr>
<td></td>
<td>• Excellent (in which case the affected end-user must provide a reason which will be captured by the Service Desk agent)</td>
</tr>
<tr>
<td>Call Source</td>
<td>Indicates where the call was originated from, e.g. email, fax, meeting, walk-in, etc.</td>
</tr>
<tr>
<td>SLA Exclusion</td>
<td>This is an exclusion used on several management reports. Although the call has violated the service type the Service Desk manager can set the exclusion to the call. Calls with exclusions are then excluded from the actual report because they are not regarded as actual violations. The exclusion will overwrite the service type.</td>
</tr>
<tr>
<td>Open Date</td>
<td>Read-only field indicating the date/time the call was created in the system.</td>
</tr>
<tr>
<td>Last Modified</td>
<td>Read-only field indicating the date/time the call was last updated in the system.</td>
</tr>
<tr>
<td>Resolve Date/Time</td>
<td>Date/Time generated by the system as soon as the call is updated to “FIXED (RESOLVED)”.</td>
</tr>
<tr>
<td>Close Date/Time</td>
<td>Date/Time generated by the system as soon as the Service Desk closes the call after the customer satisfaction rating.</td>
</tr>
<tr>
<td>Affected End-User Last Profile Update Date</td>
<td>Read-only field indicating the date/time the profile of the affected end-user has changed.</td>
</tr>
<tr>
<td>Affected End-User Last Profile Updated By</td>
<td>Read-only field indicating the person who last changed the profile of the affected end-user.</td>
</tr>
</tbody>
</table>

9.1.4 NOTEBOOK PAGES

The notebook pages are comprised of four notebooks and each contains separate notebook pages. The following notebook pages used in the Service Desk:

- **ADDITIONAL**
  This notebook contains the information related to the ticket which can be found

1 Installing, moving, adding, changing, and disposing of desktop and IT equipment.
**INFORMATION**

- **Attachments**
  - The ‘Attachments’ notebook displays information on the documents attached to the call.

- **Service Type**
  - The ‘Service Type’ notebook displays information on the events associated with a service type (also known as a SLA).

- **Properties**
  - The properties are filled in automatically, based on the call category chosen for the call.

- **User Profile**
  - Displays a summary of the Affected End-User’s contact details, location and organizational structure (Cost Code).

- **Template**
  - This page allows you to define and store the related call as a template which can be used as a model when defining other call. The Template tab is only visible in edit mode.

---

**LOGS**

- **Activities**
  - The ‘Activities’ notebook displays information on all the work done in the process of resolving a call. Activities include the initial logging of a call, updating of a call’s status, transferring a call, changing a field on a call, etc. Also refer to appendix A for the notifications associated with an activity.

- **Event Log**
  - This displays the events that have occurred on the ticket.

- **Support Automation**
  - Displays the assistance session log and lets you invite the end user to an assistance session. To be implemented at a later stage.

---

**KNOWLEDGE MANAGEMENT**

- **Knowledge**
  - Searches for or submits information to the knowledge base to help resolve incidents.

- **Solutions**
  - Stores information about the incident solution with the incident record for future reference.
RELATIONSHIPS

This notebook contains the Parent/Child & Workflow tabs:

Parent/Child
The ‘Parent/Child’ notebook displays all the child calls linked to this call as a parent. It also shows the parent call for this call.

Workflow Task
**NEW** Lists the process instance and related audit trail messages for CA IT PAM, CA Workflow, or Classic Workflow that is associated with the ticket. The Workflow Tasks tab shows fields that apply to an attached workflow. The workflow may require some of the work items to complete before the ticket can be closed.

Initially when a new call is logged you might need to capture the properties on the call, attach documents to the call and change the default service type of a call depending on your permissions.

9.1.5 CAPTURING VALUES FOR PROPERTIES

If there are properties defined for the category of the call you must complete these values on the “Properties” notebook. All the questions (properties) which display an asterisk (*) indicate that a value must be supplied. Properties in plain black are optional.

**NEW** With the upgrade from Unicenter Service Desk, the following two new value types have been introduced apart from the original freeform text field.

Checkboxes
Two-state checkboxes.
Checked = Yes.
Cleared = No.
Property values for checkboxes are validated.

### Dropdown Lists

A list of options. If your administrator has defined this field as required, you must select one of the values in the list. If a default value has been assigned, it is displayed when the list first appears. Property values for dropdown lists are validated.

**Note:** On the case detail page, only the specified values are displayed, with no indication of whether the value was set via freeform text field, checkbox, or dropdown list.

#### 9.1.6 **NEW** UPDATE SERVICE OUTAGES

To update the service outage information on an incident, select the “Outage” tab within the “Additional Information” tab:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Start Time</strong></td>
<td>Specifies the start date and time for an outage period related the subject of the incident ticket. This value, together with the End Time, lets you track incident outages with the tickets that are opened relative to the outage. You can click the calendar icon to open the Date Helper window so you can select a date.</td>
</tr>
<tr>
<td><strong>End Time</strong></td>
<td>Specifies the end date and time for an outage period related the subject of the incident ticket. This value, together with the Start Time, lets you track incident outages with the tickets that are opened relative to the outage. You can click the calendar icon to open the Date Helper window so you can select a date.</td>
</tr>
<tr>
<td><strong>Type</strong></td>
<td>Specifies the type of outage, such as a network outage. Select the outage type from the drop-down.</td>
</tr>
<tr>
<td><strong>Return to Service</strong></td>
<td>Indicates that service was restored.</td>
</tr>
<tr>
<td><strong>Percent of Service Restored</strong></td>
<td>Specifies the percentage of service that was restored.</td>
</tr>
<tr>
<td><strong>Reason</strong></td>
<td>Specifies the reason for the outage.</td>
</tr>
<tr>
<td><strong>Who</strong></td>
<td>Specifies who caused the outage.</td>
</tr>
<tr>
<td><strong>What</strong></td>
<td>Specifies what caused the outage.</td>
</tr>
<tr>
<td><strong>Why</strong></td>
<td>Specifies why the outage occurred.</td>
</tr>
</tbody>
</table>
9.1.7 SAVING THE CALL

All asterisk (*) marked fields are mandatory. You will not be able to save a call unless these fields are completed. Should you try and save a call without completing all the mandatory fields you will be prompted with the fields that you need to complete. Note that the fields can be on the main change order screen or on any of the tabs.

When you finish entering the information for the call, click the “Save” button.

Missing fields can be either on the main call screen or on any of the notebook pages:

Ensure that you have completed all the required fields and click on “Save”.

The HIGH notification method will be used for sending notifications to the following recipients:

- Affected End-User
- Assignee
- Prime Reporter
- Group
- Notification Managers 1 - 3

9.2 SEARCHING FOR A CALL

9.2.1 USING THE SEARCH MENU

Click on Search → Requests/Incidents/Problems on your menu bar to search for specific calls.
The search screen can also be opened up by clicking on the “Show Filter” button.

Initially when the screen opens you will only see the top section of the search criteria:

You can now define your search criteria based on your own requirements.
Once you have completed the search criteria, click on “Search”.

From the call list screen you can now either select a call by clicking on the blue call number or by clicking on the “+” before the call number to view a summary of that call. Note that SLA violated calls will display in red.

Use the “Show Filter” button to show the selection criteria on which you have based your query.
- If no calls are displayed it means that your search criteria did not match any of the calls.
- Calls matching the selection criteria will be displayed. Page through the calls by clicking on the left and/or right arrows in the top right of the corner. The “>>”) button will scroll to the bottom of the search list. Likewise using the “(<<” button which will only display once you have moved from page 1 onwards.

### 9.2.2 SEARCH FOR A SPECIFIC CALL

If you know the number of the call you are looking for, enter it in the text box next to the call type in the right-hand corner of the screen:
If you are not sure of the type of call, you might have to search more than once changing the type of call in the drop-down. Using the incorrect call type or number will bring up blank call screen displaying a message saying “Incident not found” or for requests, “Request not found” and the same would apply to Problems and Change Orders.

Getting an error message “Incident Not Found”? In most cases when a person searches for a case, they copy the reference number and paste it into the text box in the top right corner of the screen. This results in a blank space at the end of the reference number which will give you the error message indicating that your call was not found. Remove the space at the end of the reference number and search again.

9.2.3 USING YOUR SCOREBOARD

Scoreboard queries are predefined searches for calls based on specific requirements. Click on your predefined scoreboard query to monitor your calls by selecting your scoreboard query. You only need to click one for the search to start. The data satisfying your scoreboard query will be displayed in the list area of the screen.

9.3 UPDATING A CALL

Once you have found your call in the list screen you can click on the reference number. This will take you into the view mode of the call.
You can now add an activity to the call either from the call in view mode, or by right-clicking on the call reference number in the list screen.

**9.3.1 LOGGING COMMENTS ON A CALL**

Comments can be logged on calls in the following cases:

- Whenever a client phones the helpdesk to query the status of his/her call, the helpdesk agent can log a comment on the call.
- When the assignee wants to make a note on the call either as a reminder or a comment assisting those monitoring the call to keep track of the progress of the call.

Issue the “Log Comment” activity on the call. The following screen will display:
Once you have completed your comments, click on “Save”.

The LOW notification method will be used for sending out notifications to the assignee when a comment is logged.

PERSONALIZED RESPONSES is a feature that is available on the activity screens. A personalized response is a frequently used phrase which you can copy into your call/change.

How to use a personalized response?
- Select the personalized response from the drop-down menu
- Click on the “User Description” field.
- The detail of the selected personalized response will now be displayed in the “User Description” field.
- Click with your mouse at the end of the response added to add your comments. If you do not click with your mouse at the end of the response, the response will be added BEFORE the response.

9.3.2 TRANSFERRING A CALL

Once a call has been logged, the hotseat for the specific department will pick it up and transfer it to a specific person based on availability.

Issue the “Transfer” activity from the call. The following screen will display:
If you enter the new assignee’s name and you cannot find him, it means that this person does not belong to the group. To be able to transfer a call to an assignee not part of the group, you must click on “New Assignee” and search for him/her from the analyst list screen.

Once you have completed the transfer activity, click on “Save”.

The HIGH notification method will be used for sending out notifications to the assignee and the group when a call is transferred is logged it is therefore essential that proper transfer descriptions are typed into the transfer “User Description” textbox.

Please do NOT change the assignee directly in the “Assignee” field of a call in edit mode. This will result in an email being sent to the new assignee and group without the actual reason for the transfer. It makes life unnecessary difficult if assignees have to phone around trying to find out why a call was transferred to them.

9.3.3 UPDATING THE STATUS OF A CALL

Status update activities include the following:

- Acknowledging of a call,
- Progress updates on a call, and
- Resolving a call.

Issue the “Update Status” activity from the call. The following screen will display if no status transitions for the “Current Status” is defined in the system:
Select the appropriate status from the “New Status” drop-down and type in a detail explanation on what exactly you are doing. Click on “Save” once you have completed all the necessary fields. Note that this detail will be the feedback that will be given to the client should the client phone the helpdesk to get a progress update on his/her call.

**NEW** However, when the “Current Status” is part of a transition, the “New Status” will be restricted to the list of statuses allowed for the current status. In the example below, you can only change the status of the case from “OPEN” to “ACKNOWLEDGED” or from “OPEN” to “FIXED (RESOLVED)”.

Notice the <d> next to the status “ACKNOWLEDGED”. This indicates that the default status will change from “OPEN” to “ACKNOWLEDGED” if you click on the icon to the left of the “New Status” drop-down.
9.3.4 DELAYING A CALL

With the service type (SLA) delay function, users can suspend time passage for service type events associates with either calls or changes. With this feature the Service Desk and/or designated team leaders can prevent a service type violation from occurring by employing the delay function.

For example, a site has a service type requirement to report a desktop within 4 hours of failure. The technician shows up on site and finds that the desktop in question is behind a locked door and the person with the key took the afternoon off. The technician would then ask the Service Desk to delay the service type until the person with the key returns.

To start the service type delay, click on the “Delay(X)” button. All active service type events will then be paused until the service type is resumed.

**WARNING** – You will not be allowed to delay/resume a service type unless:
- A reason is entered for delaying a service type.
- A reason is entered for resumption of a service type.

Complete the reason for delay and click on the “OK” button:
The NORMAL notification method will be used for sending out notifications to the assignee and the client incident manager\(^2\) when a service type is delayed.

Once a service type is delayed the “Delay \((X)\)” button will be replaced with the “Resume” button. Follow the same procedure for resuming a service type than for delaying a service type.

### 9.3.5 SENDING MANUAL NOTIFICATIONS FROM A CALL

Manual notification is the preferred method of communicating with a user from a call. This way you have one central point of keeping track of all the activities on a call.

Manual notification activities can be logged by using one of the following methods:
- Right-click on the call number and select “Manual Notify” from the drop-down menu.
- From the “Activities” menu, select “Manual Notify”.

To send a manual notification from a call select “Manual Notify” from the “Activities” menu:

Click on “Add Recipient” and use the contact search tool to select the people you wish to add to your distribution list.

\(^2\) Incident manager notification will be added at later stage.
If you want to include a person in the distribution of the manual notification and the person is not in the SDM database, enter the person’s SMTP email address in the “Email address: (separated by;)” text box, and click on the “Add Email” button.

Once you have completed the text that you want to send to the recipients, click on the “Notify” button.

The NORMAL notification method will be used for sending out manual notifications to the recipients unless the “Preferred Method (Optional)” is changed to one of the other notification methods.

**TIP:** If you want to send a cell phone notification from the system you can overwrite the text in the “Message Title” field. This is the only portion of the notification what will be displayed on the recipient’s cell phone.

9.3.6 RESOLVING A CALL

Follow the same procedure as a normal status change activity but change the status of the call to “FIXED (RESOLVED)”.

The HIGH notification method will be used for sending out notifications with the call resolution to the following contacts:
- Affected End-User
- Prime Reporter
- Notifications Managers 1 – 3

9.3.7 ATTACHING A CALL TO AN EXISTING CHANGE ORDER

When the implementation result of a change will satisfy multiple call resolutions, these calls must be attached to the same change orders.

To attach an existing change to a call, select “Activities” from the menu bar and select “Attach to an Existing Change Order”:

The following screen will display:
You can now enter the change order number if known, or select the change from the change list screen by clicking on then “Change” field label.

Enter a reason for attaching the call to the specific change and click on “Attach”.

**TIP:** Refer to the Change Management User Guide for linking multiple calls to a change without having to link the calls one at a time.

### 9.3.8 DETACHING A CALL TO AN EXISTING CHANGE ORDER

If the call is already linked to a change order, the “Attach to Existing Change Order” option will be replaced with the “Detach Change Order” option. Select this option:

The following screen will display:
Enter a reason for detaching the change order and click on the “Detach” button. The change will now be removed from the original call.

9.3.9 CREATE A PARENT-CHILD RELATIONSHIP BETWEEN CALLS

In the event of call/calls having a relationship with or dependency on other calls, you may wish to link these calls.

Let us take the following scenario:

- The user logged an incident for a faulty hard drive. A new call will now be logged for the procurement department to procure the new hardware. The original incident will in this case be the parent for the procurement call.

To link the child calls to the parent call:
- Select “4. Relationships” notebook
- Select “1. Parent/Child” tab
- Click on the “Update Children” button

Note that child calls already linked to the parent will be listed in the “Children” List.

Search for the call you are looking for by filling in the parameters your need:
Select the calls you want to link as child calls from the “Request Matches” list. Note that you can select multiple calls.

Click on the “>>” button to move your calls to the “Children” list on the right.
Click on the “OK” button to link the calls selected to the parent call.

Your “Related Requests List” screen will now be updated with the additional child calls.

9.3.10 REMOVING A CHILD CALL FROM A PARENT CALL

To remove a child call from the parent call, select the “5. Parent/Child” notebook and click on the “Update Children” button.

On the “Request Children Search” screen, click on the “Search” button without filling in any of the parameter fields. The “Children Update” screen will display with all the related child calls in the children list.

Select the call/calls you want to want to remove from your parent call from the “Children” list. Note that you can select multiple calls.
Click on the “<<” button to move your child calls to the “Request Matches” list on the left.
Click on the “OK” button to remove the selected call/calls from the parent call.

You “Related Requests List” screen will now be updated with the linked child calls.

9.4 ATTACHMENTS

The different methods of attachments are:
• Attaching the document to a Repository which will upload the document to the repository server.
• Linking a document to a call by means of referring to the URL of the document. In this case the document will not be uploaded to the repository server\(^3\); it will remain at the original location.

9.4.1 ATTACH A DOCUMENT TO A CALL

To attach a document to a call, select the “1. Attachments” notebook:

Click on the “Attach Document” button to open the screen from where you can browse for the document to attach. The following screen will open from where you will upload the document:

Click on the “Browse” button and select the document you want to upload to your call.
Enter a name for the document and a detail description.

Click on the “Upload” button.

Wait from system confirmation that the document was uploaded.
Click on the “OK” button:

This document will now display with the rest of the attachments on the call on the “1. Attachments” notebook:

\(^3\) The repository server is the server that will be used to store the documents on.
9.4.2 VIEW AN ATTACHMENT

To view an attachment on a call, select the “1. Attachments” notebook. You will be presented with a list of all the attachments on the specific call:

Click on the document displayed in the “Document” column.

**WARNING** – You will not be able to view an attachment if you do not have the appropriate software to open the attachment with, on your workstation.

9.4.3 REMOVING AN ATTACHMENT FROM A CALL

To remove an attachment from a call, select the “1. Attachments” notebook. Once again you will be presented with a list of all the attachments on the specific call. Select the document you want to detach and right-click. Select the “Delete” option. The system will prompt you to ensure that you want to delete the file. Click on “Yes” to remove the file.
9.4.4 LINKING A DOCUMENT TO A CALL

On the “Attachments” notebook, click on the “Attach URL ($)” button.

Type the fully-qualified URL (for example, http://www.hp.com) in the field provided and click on the “Save” button.

You can now click on “Close Window” to close the screen and return to your call.

9.4.5 VIEW AN LINKED-ATTACHMENT

The procedure for viewing linked documents is exactly the same as for viewing normal attachments.

9.4.6 REMOVING A LINKED-ATTACHMENT FROM A CALL

The procedure for viewing linked documents is exactly the same as for removing normal attachments.

9.5 MONITORING A CALL
You can monitor a call from either the options on the “View” menu item or from any of the notebooks. The most important places to look for if you want to track a call’s progress are:

- Notification History
- Event Delay History
- Activities Notebook

### 9.5.1 VIEW THE NOTIFICATION HISTORY ON A CALL

To view all notifications sent out by the system on a call, select “Notification History” from the “View” menu item on the call. To view more detail on what was sent to the recipients, click on the message header in question.

### Notification History for 2995705

<table>
<thead>
<tr>
<th>Header</th>
<th>Sent Date</th>
<th>Recipient</th>
<th>Urgency</th>
<th>Method</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request 2995705 RESUMED</td>
<td>02/09/2012 04:18 pm</td>
<td>BOTES, HANNES</td>
<td>Normal</td>
<td>In coming</td>
<td>FYI</td>
</tr>
<tr>
<td>Request 2995705 RESUMED</td>
<td>02/09/2012 04:18 pm</td>
<td>ROSSOW, ELROY EDS</td>
<td>Normal</td>
<td>In coming</td>
<td>FYI</td>
</tr>
<tr>
<td>Request 2995705 RESOLVED</td>
<td>02/09/2012 04:18 pm</td>
<td>ROSSOW, ELROY EDS</td>
<td>High</td>
<td>In coming</td>
<td>FYI</td>
</tr>
<tr>
<td>‘Not RESPONDED’ event notify reported by for request/Incident/problem ‘2995705’</td>
<td>02/09/2012 03:48 pm</td>
<td>ServiceDesk</td>
<td>Normal</td>
<td>In coming</td>
<td>FYI</td>
</tr>
<tr>
<td>‘Not RESPONDED’ event notify assignee for request/Incident/problem ‘2995705’</td>
<td>02/09/2012 03:48 pm</td>
<td>ROSSOW, ELROY EDS</td>
<td>Normal</td>
<td>In coming</td>
<td>FYI</td>
</tr>
<tr>
<td>Request 2995705 LOGGED</td>
<td>02/09/2012 03:18 pm</td>
<td>ROSSOW, ELROY EDS</td>
<td>High</td>
<td>In coming</td>
<td>FYI</td>
</tr>
<tr>
<td>Request 2995705 LOGGED</td>
<td>02/09/2012 03:18 pm</td>
<td>Automatic, Close User EDS, Automate System</td>
<td>High</td>
<td>In coming</td>
<td>FYI</td>
</tr>
</tbody>
</table>

You will now be able to see:

- When the notification was sent
- The recipient to whom the notification was sent
- The urgency level of the notification
- The notify method of the notification
- The message header
- The message text
9.5.2 VIEW THE DELAY ACTIVITIES ON A CALL

To view when and by whom a service type has been delayed, select “Event Delay History” from the “View” menu item on the call.

<table>
<thead>
<tr>
<th>Start Time</th>
<th>Stop Time</th>
<th>Actual Delay</th>
<th>Effective Delay</th>
<th>Service Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/09/2012 04:00 pm</td>
<td>02/09/2012 04:01 pm</td>
<td>00:01:09</td>
<td>00:01:09</td>
<td>EOS-TNG 8 hours</td>
<td></td>
</tr>
</tbody>
</table>

9.5.3 VIEW THE ACTIVITIES ON A CALL

All changes made to a call are tracked in the “Activities” tab. More detail about an activity can be seen by clicking on the blue-underlined activity type in the “Type” column:

<table>
<thead>
<tr>
<th>Update Status</th>
<th>System_AHD_generated</th>
<th>02/10/2012 09:19 am</th>
<th>00:10:00</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ Update Status</td>
<td>ServiceDesk</td>
<td>02/09/2012 04:01 pm</td>
<td>00:10:15</td>
</tr>
<tr>
<td>+ Resume Service Type</td>
<td>ServiceDesk</td>
<td>02/09/2012 04:01 pm</td>
<td>00:10:00</td>
</tr>
<tr>
<td>+ Service Type Delay</td>
<td>ServiceDesk</td>
<td>02/09/2012 04:01 pm</td>
<td>00:10:00</td>
</tr>
<tr>
<td>+ Resolved</td>
<td>ServiceDesk</td>
<td>02/09/2012 03:50 pm</td>
<td>00:10:12</td>
</tr>
<tr>
<td>+ Escalate</td>
<td>ServiceDesk</td>
<td>02/09/2012 03:30 pm</td>
<td>00:10:16</td>
</tr>
<tr>
<td>+ Field Update</td>
<td>ServiceDesk</td>
<td>02/09/2012 03:13 pm</td>
<td>00:10:00</td>
</tr>
<tr>
<td>+ Escalate</td>
<td>System_AHD_generated</td>
<td>02/09/2012 03:15 pm</td>
<td>00:10:00</td>
</tr>
<tr>
<td>+ Field Update</td>
<td>System_AHD_generated</td>
<td>02/09/2012 03:15 pm</td>
<td>00:10:00</td>
</tr>
<tr>
<td>+ Initial</td>
<td>ServiceDesk</td>
<td>02/09/2012 01:20 pm</td>
<td>01:57:48</td>
</tr>
</tbody>
</table>
10 NOTIFICATIONS

There are two different types of notifications generated by the system:
- System activity notifications
- Event notifications

10.1 SYSTEM ACTIVITY NOTIFICATIONS

System activity notifications will be emailed in HTML format. These notifications include the following:
- When a call is LOGGED
- When a call is TRANSFERRED
- When a COMMENT on a call is LOGGED
- When a MANUAL NOTIFICATION is sent from a call
- When a call is RESOLVED

**NEW** System activity notifications can now be customized based on customer specific needs.

10.2 EVENT NOTIFICATIONS

**NEW** Event notifications form part of the service type events and can now also be emailed in HTML format. These notifications are also known as multiple notifications from a service type event.

These notifications include the following:
- When a call reaches a specific stage of the SLA, e.g. 75% of SLA
- When a call is logged for a VIP
- When a call is logged for a certain configuration item
- Etc.
11 SPELL CHECKING

The “Spelling” button allows you to check the spelling of the specific text field. If there are no spelling errors, a dialog will appear indicating that the spell check is complete. If spelling errors are found, the spell check result windows will appear:

<table>
<thead>
<tr>
<th>Spell Check Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not in dictionary:</td>
</tr>
<tr>
<td>DOCUMENTATION</td>
</tr>
<tr>
<td>Change to:</td>
</tr>
<tr>
<td>DOCUMENTATION</td>
</tr>
<tr>
<td>Suggestions:</td>
</tr>
<tr>
<td>DOCUMENTATION</td>
</tr>
</tbody>
</table>

The spelling mistake will appear in the “Not in dictionary” field with a suggestion for the spelling mistake. The system will assign a suggestion in the “Change to” field with other suggestions in the “Suggestions” drop-down box. You can also overwrite the suggestion in “Change to” field with another word.

Click on the “Ignore” button to ignore the highlighted word.
Click on the “Ignore All” button to ignore all occurrences of the word in the field you have spell-checked.
Click on the “Change” button to change the highlighted word.
Click on the “Change All” button to change the occurrences of the word you want to change.
Click on the “Close” button when you have finished with the spell check.

I cannot find a replacement word – what now?

If you cannot find a replacement word, please log a call for the EM Administrators to add the word/s to be added to the spellchecker.
12 **NEW** EXPORTING DATA

Another new feature that is available in CA Service Desk Manager 12.6 is the “Export” button on most of the list screens. This button allows you to export all the data on the screen directly into a MS Excel spreadsheet.

To export your data follow the following steps:
- Search for the data you want to see using the filter on the top of the screen.
- Click on the “Search” button.
- Once your results display on your screen, click on the “Export” button.

You will now be prompted to open the spreadsheet or to save the spreadsheet to a directory of your choice.

If you do not have MS Excel on your workstation, you will not get the option to open the spreadsheet. The only option that you will have is to save the spreadsheet:

Your data will now be downloaded from the system. Note that this download can take a while depending on the number of records you want to export into MS Excel. While the system is downloading your data, you will see the following screen:
If you have selected to save the spreadsheet, you have to open it from the location where you have saved it, yourself.
If you have selected to open the spreadsheet, MS Excel will open automatically.
You can now format your data according to your own requirements.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
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<tbody>
<tr>
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<td></td>
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</tr>
</tbody>
</table>

**TIP:** You can click on any of the hyperlink fields in the spreadsheet upon which the CA Service Desk Manager System will open the record you have clicked on.
13 POWER USER TIPS

This information is also available from Power User Tips on the Help menu.

When the focus is on the Go button input field (reached either by clicking it or pressing Alt+g), you can use the up and down arrow keys to alter the record type dropdown, and press Enter to initiate the selection. When the focus is on the scoreboard (reached either by clicking it or pressing Alt+x), you can use the up and down arrow keys to navigate through the selections. For folders, focus goes to the plus or minus sign to the left of the folder name. You can press Enter to open or close the folder, or press right arrow twice to display the graph context menu.

The Ctrl+X, Ctrl+C, Ctrl+V key combinations are reserved for cut, copy and paste, and cannot be used as hotkeys for buttons or tabs.

You can navigate the web interface without using the mouse. The following keys have special meaning:

- **Tab**
  Focuses on the next field. Initiates autofill for a lookup field. When pressed in the last field on a form, wraps back to the first. The Tab key bypasses hyperlinks and buttons (except on the login form). Note: When using the tab key to navigate with Netscape 7.0, there are 3 tab stops per Notebook tab button (these are the numbered tab buttons at the bottom of many forms).

- **Shift+Tab**
  Focuses on the previous field. Initiates autofill for a lookup field. When pressed in the first field on a form, wraps back to the last. Shift+Tab bypasses hyperlinks and buttons (except on the login form).

- **Alt+Up Arrow**
  On a detail form or search filter, focuses on the header of the current field if it is a hyperlink. If not, it focuses on the field above the current field. The Alt key is optional, if the focus is on a text field. Alt+Up Arrow does not change focus if used in a drop down select field. In Internet Explorer (but not Netscape or Mozilla), you can use Shift+Up Arrow to change focus to the field above a drop down field.

- **Alt+Down Arrow**
  On a detail form or search filter, focuses on the field below the current field. The Alt key is optional if the focus is on a text field. Alt+Down Arrow does not change focus if used in a drop down select field. In Internet Explorer (but not Netscape or Mozilla), you can use Shift+Down Arrow to change focus to the field below a drop down field.

- **Alt+Right Arrow**
  On a detail form or search filter, focuses on the field to the right of the current field.

- **Alt+Left Arrow**
  On a detail form or search filter, focuses on the field to the left of the current field.

- **Right Arrow**
  On a hyperlink with a context menu, displays the context menu.

- **Left Arrow**
  In a context menu, closes the menu.

- **Shift+PageUp**
  Focuses on the first field of a form. When used in the scoreboard, shifts the focus to the main form. If the focus is on the first item in a list form and the filter or edit in list form is visible, shifts focus to the filter or edit form. If the focus is on the first item in a filter or edit in list form, and a list is displayed, shifts the focus to the first item in the list.

- **Shift+Home**
  Works the same as Shift+PageUp except in a text entry box, where it has its standard meaning of selecting all text from the cursor to the beginning of the line. When used in the scoreboard, shifts the focus to any form appearing in the right window pane.

- **Shift+PageDown**
  Focuses on the last field of a form. If the focus is on the last item in a list form and the filter or edit in list form is visible, shifts focus to the filter or edit form. If the focus is on the last item in a filter or edit in list form and a list is displayed, shifts the focus to the last item in the list.

- **Shift+End**
  Works the same as Shift+PageDown except in a text entry box, where it has its standard meaning of selecting all text from the cursor to the end of the line.

- **Esc**
  Presses the Cancel button on the current form, or the (Close Window) link if no Cancel button is present.

- **Alt+letter**
  Activates the button or menu with the underlined letter.

- **Alt+number**
  Shows the notebook tab with the underlined number and focuses on its first field.

- **Alt+g**
  Focuses on the Go button input field.

- **Alt+x**
  Focuses on the scoreboard.
Other keys have their standard meaning. Some that may be useful include:

- **Enter** Activates the currently focused hyperlink. In a select drop down list, selects the currently focused item.
- **Shift+Right Arrow** Selects the next character of text in a text field.
- **Shift+Left Arrow** Selects the previous character of text in a text field.

**General:**

- **The Go Button** When the focus is on the Go button input field (reached either by clicking it or pressing Alt+g), you can use the up and down arrow keys to select the record in the drop down list, and press Enter to initiate the selection.
- **The Scoreboard** When the focus is on the scoreboard (reached either by clicking it or pressing Alt+X), you can use the up and down arrow keys to navigate through the selections. The down arrow key automatically opens folders as it gets to them, and the right arrow key is available for displaying the graph menu.
## 14 CHANGE HISTORY

<table>
<thead>
<tr>
<th>Published/Revised Date</th>
<th>Version #</th>
<th>Author (Optional)</th>
<th>Section/Nature of Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>October 2009</td>
<td>#1</td>
<td>HP Enterprise Services</td>
<td>Document Creation</td>
</tr>
<tr>
<td>August 2010</td>
<td>#2</td>
<td>HP ES EM</td>
<td>Telephone number changes</td>
</tr>
<tr>
<td>January 2012</td>
<td>#3</td>
<td>HP ES EM</td>
<td>Changed document for upgrade to CA Service Desk Manager 12.6</td>
</tr>
</tbody>
</table>
# 15 CROSS REFERENCED INFORMATION

<table>
<thead>
<tr>
<th>Document Title</th>
<th>Document Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA Unicenter ® Service Desk – User Guide</td>
<td><a href="http://www.ca.com">www.ca.com</a></td>
</tr>
<tr>
<td>CA Unicenter ® Service Desk – Getting Started</td>
<td><a href="http://www.ca.com">www.ca.com</a></td>
</tr>
<tr>
<td>CA Service Desk Manager – Administration Guide r12.6</td>
<td><a href="http://www.ca.com">www.ca.com</a></td>
</tr>
</tbody>
</table>
## Appendix A : Removal of Internet Explorer 7 from Certification Matrix

### Removal of Internet Explorer 7 from Certification Matrix

<table>
<thead>
<tr>
<th>Operating System:</th>
<th>WINDOWS</th>
<th>Solution No:</th>
<th>47</th>
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</thead>
<tbody>
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</tr>
<tr>
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<tr>
<td>Fix:</td>
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</tr>
<tr>
<td>Distribution Code:</td>
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<td></td>
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</tr>
</tbody>
</table>

### Problem Description

Dear Valued Service Desk Manager r12.6 Customers,

For Service Desk Manager r12.6, CA Technologies has decided to remove Microsoft Internet Explorer 7 from the certification matrix [https://support.ca.com/irj/portal/anonymous/phpsupcontent?contentID=%7b76E60328-7D65-48AD-B29F-FDA7F4C235EA%7d](https://support.ca.com/irj/portal/anonymous/phpsupcontent?contentID=%7b76E60328-7D65-48AD-B29F-FDA7F4C235EA%7d). This was the result of challenges seen by our customer base. Known reported issues are:

1. Rendering the web form to create new tickets may be extremely slow.
2. Opening more than four ticket web forms for viewing/editing at the same time may result in a great amount of OS memory being used.
3. Opening and closing a web form may not release memory back to the OS.

CA has worked with Microsoft extensively with the noted issues. For item 3, the cause of the memory leak was found to be due to a Microsoft problem with circular iframe references that Service Desk web script code contains. See the following Microsoft article entitled:

"Microsoft Article ID: 975736 - A memory leak occurs when you open a Web page that contains a circular reference in an iframe"

CA has notified our customers of this article via HYPER notification RI36595. See RI36595 for further details and a link to the above named article: [https://support.ca.com/irj/portal/anonymous/SolutionCDNResults?aparNo=RI36595&actionID=4](https://support.ca.com/irj/portal/anonymous/SolutionCDNResults?aparNo=RI36595&actionID=4)

However, even with the recommended configuration changes described in the article to resolve the issue, you may still experience residual memory being left over.

From our continued investigation for these performance issues, CA has found that Internet Explorer 7 is not optimized to handle modern web technologies efficiently. Specifically, the bottleneck was narrowed down to Service Desk's use of jQuery web technology. Service Desk Manager r12.6 makes heavy use of jQuery for the new web UI changes and for the features introduced. jQuery is a JavaScript library allowing simplified client-side scripting of HTML. In addition, jQuery allows the creation of powerful dynamic web pages and web
applications. When comparing the same web operations on Internet Explorer 7 with Internet Explorer 8 or above, or Firefox, you will notice a better performance experience. Internet Explorer 7 is an older browser that is not actively being maintained by Microsoft for optimization with the latest web standards and web technologies. As such, CA recommends that you consider implementing either Internet Explorer 8 or above, or Firefox.

Please visit the Service Desk Manager product home page on http://support.ca.com for the latest updates and compatibility information.

Our continued business partnership with our customers is important to us and we look forward to working with you in the future.

Regards,
CA Technologies Service Desk Product Management

Solutions Downloads
Microsoft has reported that FTP and HTTP file downloads over a certain size using Internet Explorer may not be successful. The FTP file limit is 4GB or greater. The HTTP file limit is 2GB or greater. If you need to download files that exceed these limits please use Mozilla Firefox 3.0 or command line FTP.