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## Contents

**About this manual**... 5  
- Documentation... 5  
- Conventions... 5  
- Keyboard access... 6  

**The Service Desk Workspace**... 7  
- The LANDesk Service Desk Suite and the Service Desk console... 8  
- The Service Desk console workspace... 9  
- Privileges... 12  
- Integrated Login... 12  
- Updating a process that another user is working on... 13  
- Simple lists and Complex lists... 13  
- LANDesk Spell Checker... 14  

**Working with Service Desk**... 17  
- Progressing a process... 18  
- Process Actions... 20  
- Notes... 21  
- Tasks... 22  
- Assigning processes... 25  
- Reminders... 27  
- Attaching files to a process... 28  
- Service levels and agreements... 29  
- Parent-child linking... 30  
- Understanding resolution and closure... 32  
- Generating Word documents from your processes... 34  
- Searching for processes and other items... 35  
- Including standard information in a process... 36  
- Using queries to find information... 37  
- Performing a bulk action on a set of query results... 45  

**Index**... 49
About this manual

Documentation

The *LANDesk Service Desk User Guide* is a reference manual for all users of the LANDesk Service Desk console. This manual is designed for use in conjunction with the Service Desk software and online help system.

This manual describes how analysts use LANDesk Service Desk Suite for their day-to-day work.

Configuration

LANDesk Service Desk Suite is highly configurable: you can change the data, the layout of the windows that your application uses for entering and displaying information, and even the workflow of the processes. This guide describes how to change the design of your system, and any examples given are only representative of configured systems – your own requirements may differ widely.

Before you begin

The LANDesk Service Desk Suite is set up by either your system supervisor or an IT support engineer.

Conventions

This manual contains certain conventions and special symbols that are used throughout.

Keyboard

Information you enter using the keyboard is shown as Type or Enter followed by an example in bold text, for example: Type **ABC-123**.

Place holders that you must replace with your own text are shown italicised, for example *User Name*.

Keys you press for special functions are shown in capitals, for example **SHIFT**.

When two function keys are pressed at the same time, for example both the **CTRL** key and the **ALT** key are pressed, this is shown as **CTRL + ALT**.

Mouse actions

Mouse actions are described as follows:

- Click, where the left mouse button is used
- Right-click, where the right mouse button is used
- Point, where the cursor pointer is moved using the mouse
- Select, where the left mouse button is used to make a selection in a box
- Drag, where the left mouse button is pressed and held while the mouse is moved

Screen Images

Screen images have been taken from Service Desk itself. They are provided to help you recognise the part of Service Desk you are using. Because your system has been set up specifically for your organisation, the screen details you see may differ, particularly in the examples shown.
Keyboard access

In the Service Desk Console, you can use the keyboard to navigate your way around the user interface. There are a number of shortcuts that we have created for frequently used tasks.

<table>
<thead>
<tr>
<th>Keystroke</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ENTER</strong></td>
<td>If you are viewing Query Results anywhere within the application, pressing ENTER opens the selected item. This could be on a dashboard, a Query Results View, or a tab and so on.</td>
</tr>
<tr>
<td><strong>SPACEBAR</strong></td>
<td>If you are viewing Query Results anywhere within the application, pressing the Spacebar opens the selected item. This could be on a dashboard, a Query Results View, or a tab and so on.</td>
</tr>
<tr>
<td><strong>F5</strong></td>
<td>Refreshes a query results list.</td>
</tr>
<tr>
<td><strong>F6</strong></td>
<td>Moves you around the workspace in a clockwise direction.</td>
</tr>
<tr>
<td><strong>SHIFT+F6</strong></td>
<td>Moves you around the workspace in an anticlockwise direction.</td>
</tr>
<tr>
<td><strong>F7</strong></td>
<td>Changes focus to the Shortcut bar.</td>
</tr>
<tr>
<td><strong>F8</strong></td>
<td>Changes focus to the Query Results panel.</td>
</tr>
<tr>
<td><strong>Arrow Keys</strong></td>
<td>If the window that you are working on has collection tabs, when you are on the tabs, you can use the arrow keys to navigate between the tabs.</td>
</tr>
<tr>
<td><strong>F8</strong></td>
<td>Changes focus to the Actions list.</td>
</tr>
<tr>
<td><strong>F7</strong></td>
<td>Changes focus to the Shortcut bar.</td>
</tr>
<tr>
<td><strong>CTRL+1, CTRL+2, etc</strong></td>
<td>Moves the focus to the correspondingly ordered group in the Shortcut bar.</td>
</tr>
<tr>
<td><strong>CTRL+SHIFT+L</strong></td>
<td>Takes you to the lookup boxes on the toolbar.</td>
</tr>
<tr>
<td><strong>ALT+Down Arrow</strong></td>
<td>When focus is on a drop down list, you can press ALT+Down arrow to expand the list. Pressing it again, contracts the list. Similarly, ALT+Up Arrow, contracts the list, and pressing it again, expands the list.</td>
</tr>
<tr>
<td><strong>TAB</strong></td>
<td>Moves between fields on a window; moves between items in a collection tab; selects the highlighted item in a drop down list.</td>
</tr>
</tbody>
</table>
LANDesk Service Desk enables analysts within a service desk team to support customers or end-users. This chapter describes the basic concepts behind the Service Desk console and the options available to analysts. It also highlights the configurable nature of Service Desk. You can find out about:

- The LANDesk Service Desk Suite and the Service Desk console on page 8
- The Service Desk console workspace on page 9
- Privileges on page 12
- Integrated Login on page 12
- Simple lists and Complex lists on page 13
- LANDesk Spell Checker on page 14
The LANDesk Service Desk Suite and the Service Desk console

The LANDesk Service Desk Suite is a set of applications that enable businesses to maximise their potential through providing the highest levels of service to their internal and external customers. The functionality provided by the applications ranges from the management of Incidents, Problems, and Changes to knowledge tools and integration with desktop and network management tools. Much of the functionality is available through different delivery platforms, such as web browsers, mobile devices, and a traditional Windows client.

The Service Desk console, which is described in this document, is the Windows client application that provides a single entry point and consistent user interface to the Service Desk Suite. For example, you might have access to the components that provide knowledge tools, desktop management, or configuration management and so on. The Service Desk console also hosts the components used to administer and customise the design of your system. For example, you create and manage users and service levels using the Administration component within the Service Desk console.

**NOTE:** Only analysts can log in to the Service Desk console.

Processes

Service Desk enables analysts within a service desk team to support customers or end-users by using different processes, for example, Incidents, Problems, Changes, Calls, Activities and so on. All of these examples follow processes have been designed for you using the Process Designer component of Service Desk.

**NOTE:** For more information about Process Designer, see the LANDesk Service Desk Suite Designer Guide.

These processes contain similar attributes for capturing relevant information, and similar components for setting up resulting actions and assignments, or to hold additional information about the specific process.
The Service Desk console workspace

The Service Desk console workspace consists of a tree, the Process window, and any Actions that are set up for the current status.

The Shortcut bar
The Shortcut bar provides you access to the different components of Service Desk that you may have the privileges to use, as well as standard queries and reports that have been specifically designed for you, your role, or your group. The shortcut bar also contains shortcuts to the processes that you will use on a daily basis.

Shortcut groups can be created for different job functions, and even just for the Support Group that you are a member of. The Shortcut bar is split into different groups, which you access by clicking the required icon at the bottom of the shortcut bar.

1 – The Shortcut bar
2 – Actions list
3 – Process Details window
4 – Shortcut groups
5 – Process Tree
6 – Current status
7 – Audit trail
8 – Process tabs
You can also expand the shortcut groups by selecting the grab bar at the top of the row of icons at the bottom of the Shortcut bar, and dragging upwards. You will notice that if a shortcut group is displayed as shown above, it disappears from the row of icons:

Conversely, if you drag the grab bar back again, the shortcut groups appear on the row of icons once more:

The Actions list

When you save the process, a list of available actions appears in the Actions list. You can use these actions to progress or add information to the process. If you have the relevant privileges to progress a process, you may see that a split appears in the Actions list to separate those actions that progress a process (in other words, change its status) from those which do not. For example, a Resolve action appears above the split, and an Add Note action appears below the split. This is an optional setting which will have been defined by your system administrator.

The Details window

The Details window consists of fields that you use to capture information during a specific process, for example a support request. By default, mandatory fields are coloured pale red until you enter information into them, but this can be configured, so it may be different on your system.

The Process tree

The Process tree displays the current status, as well as folders containing any components, such as tasks, notes, or attachments. This provides you with a quick view of what has happened to the process so far.

Tabs

Process components can also be displayed on the tabs at the bottom of the Process Details window. When the window is designed, your system administrator may have configured the window so that you can see the tree, the tabs or both.
Using the formatting toolbar

Some fields in your system may have been configured to use the formatting toolbar, which enables you to format the text you type, paste formatted text into the field, and add hyperlinks.

![Formatting Toolbar Example](Image)

To add a hyperlink using the formatting toolbar:

1. Open the required window and type the required text that is not part of the hyperlink.
2. Click ![Create Hyperlink](Image).
   The Create Hyperlink dialog appears.

3. In the **Link Text** box, type the text that you want to use as the link.
4. In the **Link URL** box, type the required web address, then click **OK**.
   The hyperlink is added to the field.
5. Press the right arrow key to move the cursor out of the hyperlink, so that you can continue to add standard text.

Customising the workspace

The console workspace is highly configurable, including how you set up and use your processes. Not only can the terminology used within Service Desk be changed to suit that used in your own organisation, but the layout of all of the Process Details windows, as well as the process component windows can also be customised. This manual will help you understand the concepts involved in their management. However, your own business requirements may differ widely from the examples used in the manual.

**NOTE:** Information about customising the appearance of Service Desk is described in the LANDesk Service Desk Suite Designer Guide and LANDesk Service Desk Suite Administrator Guide.

The Audit Trail

Service Desk maintains a complete history of each process for the purpose of tracking and monitoring all the changes that occur during a process. This includes recording assignments, the date and time of each action, and any components that are added or modified (and by whom).

The resulting audit trail enables you to examine all actions associated with a process, including all the progression steps (such as assignment or reassignment to an analyst, group or role) that the process has gone through.
The items that appear in the Audit Trail will have been configured by your system administrator. A useful feature of the Audit Trail, is that you can export it to either a *.CSV file or to Microsoft Excel.

**NOTE:** To view the Audit Trail, open the required process, then at the bottom of the Process Tree, click to expand the Audit Trail.

### Privileges

Your privileges determine the actions and components that are available to you. Privileges are linked with roles (and optionally with groups) and not with users, so you need at least one role and to belong to one or more groups.

For example, you may have been linked to a role that enables you to view and update the processes for which you are responsible. You may also be linked to other roles that enable you to have read-only or no access to other processes.

**NOTE:** Setting up privileges is described in the *LANDesk Service Desk Suite Administrator Guide*.

### Integrated Login

Most organisations configure Service Desk to use Integrated Login. This means that when you start the Service Desk console, you do not need to enter your User ID or password.

**NOTE:** For information about configuring Integrated Login, see the *LANDesk Service Desk Suite Administrator Guide* and the *LANDesk Service Desk Suite Setup Guide*.

If your organisation does not use integrated login, then you are supplied with a User ID and Password. We recommend that you change your password, to a memorable word. If you want to change it at any time, for example, for security reasons, then you can do so.

### Changing your password

All users can change their own password.

**To change your own password:**

1. On the toolbar, click .
   The Set Password dialog appears.
2. In the **Old Password** box, type your current password, then type your **New Password** and confirm it, then click **OK**. Your password is changed.

### Updating a process that another user is working on

If two users are working on the same process at the same time and they update *different* fields, both updates succeed. (This includes background processes that update escalations.) If the second user attempts to update the *same* field that has already been changed, a message is given, the change is discarded and the updated version of the process is displayed.

### Simple lists and Complex lists

Service Desk can be configured to use two different types of list: Simple and Complex. You may find that both types are used within your system. The Simple list works as a standard drop down list, and has paging controls at the bottom of the list if a large number of items are in the list. A Complex list enables you to filter the list by the specific attributes, for example, in the example below, you could search for users in a specific location. For example, your user is in Belgium, so on the Address box, you would type Belgium. The list would refresh and only those users located in Belgium will appear.

**NOTE:** Lists are configured by your system administrator, and are described in the *LANDesk Service Desk Suite Designer Guide*.

**A simple list:**

![Simple list example](image-url)
A complex list:

**LANDesk Spell Checker**

Within Service Desk, you can check the spelling of all of your processes. There is also an option to configure specific fields on windows to highlight misspelled words as you type them.

You can choose from the following dictionaries: English (UK), English (US), German, French, Russian, and Portuguese.

**NOTE:** The spell checker is not available if the culture is set to Japanese.

To use the spell checker:

1. Open the relevant window.
2. Click ![Spell Checker](image)
   If a mistake is found, then the Spell Checker dialog appears.

   ![Spell Checker](image)

3. In the **Suggestions** list, select the correct spelling, then click either **Change Once** or **Change All** as appropriate.

   **NOTE:** If the spelling is correct, but is not recognised, then click **Ignore Once** or **Ignore All**, or if you know that you frequently use this word, then click **Add to Dictionary** to define that the spelling of the word is correct, and it will not be highlighted as an incorrect spelling.

4. When the spell checking is complete, click **OK**.
If your system has been configured to do so, you may find that you have spell checking working as you type. So if you misspell a word in the Description field on the Incident window, it is underlined in red.

You can correct misspelled words by right-clicking the underlined word, then selecting the correct spelling.
Working with Service Desk

This chapter describes the basic concepts behind the Service Desk console and the options available to analysts when logging, progressing and closing processes. It also highlights the configurable nature of Service Desk. You can find out about:

- *Progressing a process* on page 18
- *Notes* on page 21
- *Tasks* on page 22
- *Assigning processes* on page 25
- *Reminders* on page 27
- *Attaching files to a process* on page 28
- *Service levels and agreements* on page 29
- *Parent-child linking* on page 30
- *Understanding resolution and closure* on page 32
- *Generating Word documents from your processes* on page 34
- *Searching for processes and other items* on page 35
- *Including standard information in a process* on page 36
- *Using queries to find information* on page 37
- *Performing a bulk action on a set of query results* on page 45
Progressing a process

Progressing processes is the task of taking the process from initial logging, through all of the support activities required to complete it, the resolution of each of those activities, and finally the timely resolution and closure of the process itself. The following illustration is of the Simple Incident process.

![Process Flow Diagram]

**NOTE:** When a process is logged and saved, its status is OPEN, and a number of actions become available, for example, Add Assignment, Add Note and so on. The actions available on the process can change, depending upon its status. You can see which actions are available on the Actions list.

### Actions

- Close
- Resolve
- Add Assignment
- Add Attachment
- Add Child Incident
- Add Note
- Add Parent Incident
- Add Reminder

**NOTE:** For more information about the Actions list, see *The Actions list* on page 10.

**NOTE:** You can see where you are in the process by clicking on the toolbar. The process flow appears, with the current status highlighted. Clicking an item in the process diagram changes the colour of the connectors that link into the selected item to magenta, and the connectors that leave the item to blue.

As a user, you may be allocated a specific task to complete. Another user, or a Third Party (such as a supplier) may be working on other tasks at the same time. Most actions have a window associated with them, but others do not (for example Stop Clock). You complete the required investigations and complete the information on the relevant window. This could be the Assignment Completion window for example.
When all tasks have been completed, then a new action is available. In the example, this is to **Resolve** the Incident. You may have the privilege to Resolve the Incident, or it may be another user, such a supervisor who must complete this. Once the Incident has been resolved, then the process moves to a different status - RESOLVED.

From the RESOLVED status - there are two ways that the Incident can progress to the next stage. It can be Unresolved, if for example, the issue has not been satisfactorily resolved, or it can be Closed. Again, these are both actions.

If the Incident has been satisfactorily resolved, then a supervisor, or other user, can then Close the Incident. Once they have completed this action, the status of the Incident moves to CLOSED. At this stage, there is no more work to be done on this Incident, but one action remains available - Reopen. This can be used if the issue recurs.

**The Details window**

Each process has a configurable Details window that you use to record as much information as possible when a process is initially raised. It is designed to capture a brief description of the process, the specific date and time an analyst logged it, who requested it, who created it, and so on.

The Details window that you see may differ from that seen by other analysts, as attributes can be made privilegeable, they may see attributes that you cannot. For example, you may not be able to see confidential information, whereas other users have the required privileges to do so. This will have been configured by your system administrator.

When you have captured the relevant process information and all mandatory attributes are complete, click ![Save] to save the process. Alternatively, extra components can be added to the process such as notes and tasks, or you could assign the process to a specific analyst, group or role.

**NOTE:** For more information, see **Process Actions** on page 20.

**The paged list control**

A paged list enables you to select many items and copy them to a specific attribute on your window. For example, on a Change Details window, you may want to add the Title of many configuration items to the Details field.

**NOTE:** If a paged list control has been added to your window, you select the configuration items that you want to add and then click **Copy**. The items are then copied into the **Details** attribute.

**WARNING:** If there is already an existing value in that attribute, it will be replaced by these items.

**Using the paged list control:**

1. Log the relevant process. For example, a **Change**.
2. Complete all of the relevant information.
3. Within the paged list control, select the items that you want to add. You do this using the mouse and clicking (holding either the **SHIFT** or **CTRL** button), then click **Copy**.

**NOTE:** If you cannot find the items that you are looking for, then you can search for them using the **Search** box. Type the item that you are looking for (the search is based on a **Begins With** condition), and then click **Search**.

**NOTE:** If you have to select items from more than one page, the items that you select on each page are remembered, and when you click **Copy**, they are all added to the relevant control on the window.

4. Continue with your process as usual and save your changes.
Related attributes

When you enter specific information, such as User ID on the Details window, you may notice that certain other fields are automatically updated, such as the users E-mail address. These fields are read-only when you open the Details window, and you cannot modify the information on this window, and are known as related attributes.

In the example above, the Raise User Details information is taken from the User business object, and attributes from this business object can be added to your window. This is configured in the Object Designer component of Service Desk.

**NOTE:** For information about configuring related attributes, see the LANDesk Service Desk Suite Designer Guide.

Categories

The Details window often has category lists that use pre-configured descriptions to describe the nature of the support requirement. For example, you might create a category SOFTWARE with sub-categories of INSTALL, UPGRADE, REMOVE and OBTAIN license. This extra information enables you to decide on the necessary actions, and helps you to assign the process to the appropriate group, role or analyst.

A category hierarchy defines the process type more clearly. While you can have at least four levels of category, it is best to keep the number of categories (and their sub-categories) small in order to help with the system’s usability. In general, it is better to use Level 2 categories to define the detail of a category, rather than overloading the system with a large number of Level 1 categories.

Different Response Levels can be associated with different categories. For example, you may require a category of SERVER to have a quicker response time than a category of SOFTWARE, because more people are affected by issues to do with the server.

**NOTE:** For information about Response Levels, see Service levels and agreements on page 29.

Process Actions

Information gathered using the Details window represents the perception of the person raising the issue. Each process starts with the information entered in the Process Details window, but often becomes more complicated. For example, a single process may involve more than one issue, or may require several separate actions before you can close it.

**NOTE:** For example, an electrical surge may result in several faults in different assets such as a few burnt out fuses and a flickering monitor. You may have to make phone calls to different suppliers to order new equipment, then send a technician to install this equipment.

To enable all of the support information to come together in a single process, you can use the following process components and Actions:

- **Notes** – To record additional details about the process – see Notes on page 21.
- **Tasks** – Define the activities that must be completed before the process is resolved – see Tasks on page 22.
- **Task notes** – To record additional details about the tasks.
- **Assignments** – To ensure that someone is responsible for the process – see Assigning processes on page 25.
- **Reminders** – To send timed reminders to analysts or relevant parties – see Reminders on page 27.
- **Attachments** – To link to items that contain information that is pertinent to the current process – see Attaching files to a process on page 28.
- **Stop Clock** and **Start Clock** (see Stop Clock on page 30), which enable you to govern any time lost owing to issues beyond the scope of Response levels and Agreements (see Service levels and agreements on page 29).
- **Parent-child linking**, which enables you to create relationships between processes – see Parent-child linking on page 30.
- **Resolving** and **closing** the process – see Understanding resolution and closure on page 32.

These components enable you to subdivide various aspects of a process, and manage all the information and activities relating to the process in the most efficient way possible.

**NOTE:** Several procedures described in this chapter rely on making changes to a process. You need the relevant privileges to perform these procedures, otherwise you may not have access to certain actions.

**NOTE:** As with the Details windows, you need not display all process components at the same time: you can minimise or close individual component windows.

### Notes

Notes provide a convenient way to add information to a process or its components as the process progresses towards resolution. A note does not affect the current status of the process. You can attach any number of notes to a single process, or a process component.

### Adding notes to a process

Notes appear in the Notes branch of the Process Tree and on the Process Notes tab. Each note has its own node. You can use the Notes branch to open existing notes.

To add a note to an incident:

1. On the **Actions** list, click **Add Note**.
   
   The Add Note window appears.
2. Type the relevant information, then click save, then close, the note.
   The note appears listed in the Notes folder in the Process Tree, and also on the Process Notes tab.

   **NOTE:** Double-click an existing note to view or modify it.
   To remove a note, right-click the relevant note in the Process Tree, then click **Delete**.

### Tasks

If a process incorporates a number of activities, the process can be subdivided using one or more tasks.
Tasks contain actions and support issues that must be resolved before you can close the process. Tasks are also processes (and are sub-processes of the main process).

You can assign a task to only one analyst, group or role at a time. If your process contains many tasks, each of these can be assigned to a different person. Multiple tasks can be set up as consecutive or parallel activities within a process.

1. **Consecutive tasks**
2. **Parallel tasks**

   All of the tasks associated with a process must be completed before you can resolve or close the process.
As you add tasks to a process, they appear in the Tasks branch of the Process Tree and on the Process Tasks tab. You can use the Process Tree to access these tasks.

To create a task:

1. On the Actions list, click Add Task.
   The Add Task window appears.

2. Type the relevant information, then click to save the task.
   The Task Actions list populates.

3. Click the appropriate action, then complete the information as you would for a process.

4. Click to save the action, then close the window.

5. On the Add Task window, click to save, then close, the task.

NOTE: Double-click an existing task to view or modify it.
To remove a task, right-click the relevant task in the Process Tree, then click Delete.
**Task notes**

Like top-level processes, you can add notes to a task. Task notes are separate and different from the process notes stored for the process. Task notes are often used to describe the results of problem analysis and diagnosis steps that are embodied by the task.

**Completing a task**

You must complete all the tasks within an incident before you can resolve or close the process itself.

**To complete a task:**

1. Open the relevant task, then in the **Actions** list, click **Complete**.
   The Complete Task window appears.
2. Type the relevant information, then click ![Complete](image).
   The Actions list changes according to your process.

   **NOTE:** When a task is resolved, its status changes on the Process Details window.

**Unresolving a task**

There might be occasions when you resolve a task, only to find later that the issue raised was not fully dealt with. In this situation, you can unresolve the task. Alternatively, you might choose to raise a new task.

**To unresolve a resolved task:**

1. View the resolved task that you want to unresolve.
2. On the **Actions** list, click **Unresolve**.
   The Task unresolves.

**Using configuration items in tasks**

Service Desk uses the concept of **configuration items** to represent items for which customers require support. Typically, a configuration item is a piece of equipment – a computer, or a software program, for example. However, a configuration item can also represent virtually any other service that is part of the support process, such as a training course.

You can add any configuration item information onto the Task window that will prove useful, such as the relevant configuration item’s Reference Number or name.
Assigning processes

You can assign a process to only one analyst, group or role at a time. If you want to assign a process to multiple people, your process must be designed to have multiple parallel tasks, each of which can be assigned to an analyst, group or role.

When you assign a process, the assignment information appears in the Assignments folder of the Process Tree.

If you assign a process to group or role, the process appears in their Workload List. If you assign a process to a single analyst, only that analyst has the process listed on their Workload List. Service Desk can be configured to assign processes automatically if you do not assign them specifically, or make assignment mandatory.

The following diagram shows how you can assign and reassign a process throughout its process:

1. A front-line analyst captures the initial Process information.
2. He assigns the Process to the relevant Group, and each of the tasks is also assigned (see 7).
3. The group manager assigns the Process to an analyst within the group.
4. The analyst works on the Process, and may assign it to an external engineer.
5. The engineer completes the necessary work, then reassigns the Process to the analyst.
6. The analyst completes the information, then resolves the Process.
7. You can assign tasks to either an analyst, group or role. Tasks and Processes can have only one assignment at a time, although independent tasks and processes can be assigned to the same analyst, group or role. When all tasks are complete, you can resolve the Process.
Assigning processes and tasks

To assign a process or task:
1. On the process or task Actions list, click Add Assignment. The Add Assignment window appears.
2. Select the relevant assignee, then type the relevant information.
3. Click .

The assignment appears listed in the Assignments folder in the Process or Task Tree, and also on the Process or Tasks Notes tab, depending upon the design of your system.

**NOTE:** Multiple tasks can be added to a process when there are several issues to deal with that must be resolved by different people. This means that different analysts can work on the Process at the same time. Only one assignment can exist at any time for a process or task.

Sending an assignment notification

You can send a notification message to the following people to ensure that they are aware of who the process is assigned to:
- The analyst who is responsible for the process (the Assignee)
- The person who logged the process (the Originator)
- The customer associated with the process
- The supplier associated with the process

To notify the required people about an assignment:
- On the Assignment window, select the relevant check boxes.
  - Notify Assignee
  - Notify Customer

When assignment occurs, Service Desk automatically sends a message to the selected Analyst, Group or Role.

Reassigning a process

When a process is assigned, the analyst, group or role is usually responsible for progressing the process through to resolution and closure. However, it is sometimes necessary to reassign the process to a different analyst, group or role.

To reassign a process or Task:
1. On the Process or Task Actions list, click Add Assignment. The Add Assignment window appears.
2. Select the relevant assignee, then type the relevant information.
3. Click .

The assignment appears listed in the Assignments folder in the Process or Task Tree, and also on the Process or Tasks Notes tab, depending on your configuration.
Reminders

As a process progresses, there are often times when you or another analyst needs to be reminded of something, such as calling a customer, looking at a task at a particular time, or attending a meeting. Using reminders, you can send a message to yourself or other analysts that appears at a specified time and date. You do not need to have the Process visible for a reminder to appear.

However, reminders are not a substitute for Service Desk’s own Response Level and Service Level management system.

**NOTE:** For more information about Response Agreements and Response Levels, see *Service levels and agreements* on page 29.

Setting a reminder

Reminders are related to processes – you can have any number of reminders associated with a single process, and you can set a reminder for any number of individuals, groups or roles.

**To add a reminder to a process:**

1. On the *Actions* list, click *Add Reminder*.
   The Add Reminder window appears.

2. Type the relevant information, then click [ ] to save the reminder.
3. On the *Actions* list, click *Add Recipient*.
4. Select the required users, groups and/or roles, then click *OK*.
5. Click [ ].

**NOTE:** Double-click an existing reminder to view or modify it.
To remove a reminder, right-click the relevant reminder in the Process tree, then click *Delete*.

**NOTE:** Your system administrator may have created a query to enable you to access your reminders when they activate.
Attaching files to a process

You can add any type of attachment to a process, such as a spreadsheet, text document or image file. When you attach the file, you can access them from the Attachments folder on the Process Tree. You can attach any number of files to a single process.

**NOTE:** You must have the relevant application to view attached files. You cannot attach files that are larger than 4MB; for files larger than this, we recommend that you store the file on a specified directory and put the path to this directory in the attachment name. The process must be at the correct status for you to be able to add attachments, that is, the action must be visible on the Actions list. You must also have the privilege to add attachments. You cannot attach files that are already open – you must first close the file.

To attach a file to a process:

1. On the Actions list, click **Add Attachment**.
   The Add Attachment window appears.

2. Type the relevant information, then in the **Attachment Document** group box, click ![open button].
   The Open dialog appears.
3. Select the required file, then click **Open**.
   The attachment is added to your database.
4. Click ![save button] to save, then close the window.
   The document appears listed in the Attachments folder on the Process Tree, and also on the Attachments tab, depending on your setup.

**NOTE:** Double-click an existing attachment to access it.

To attach files to processes using drag and drop:

1. With the relevant process open in Service Desk, open an instance of **Windows Explorer**.
2. Locate the file(s) that you want to attach to your process.
3. Select the file(s) and drag them onto the Process tree top node.

**NOTE:** If there are no existing attachments in the process, then an **Attachments** folder is created. If there are existing attachments, you can alternatively drag them onto the **Attachments** folder if you prefer.

The **Title** (as it is a mandatory field in the out of the box database) is automatically completed with the name of the file, and the path to the file is also completed. You can, if required, change the Title.

4. If you do make changes to the **Title**, then click ![save button] to save and close the Attachment window. Otherwise, just close the window and progress the process as required.
As you can attach any type of file to a process, for example a registry file or executable, opening these types of files may cause you problems, so you can save the attachments instead.

To save an attachment:
1. With the relevant Attachment window open, click Save As.
   The Save As dialog opens.
2. Navigate to the required location, then click Save.
3. Close the Attachment window.

You can, if required, send attachments to people. The default subject and message text can be configured using the Object Designer component of Service Desk.

To send an attachment to a recipient:
1. Open the required process, and from the tree, open the attachment that you want to send.

2. On the Actions list, click Send.
   The Send window appears.
3. Select to whom you want to send the message, and if required, modify the Subject or Body text.
4. Click .
   The Attachment window closes and the attachment is sent to the relevant recipient.

Service levels and agreements

Service desks are often obliged to provide support at certain times of the day and to provide a response to issues within a certain turnaround time. These arrangements might be formally agreed with your customers and specified in your business procedures, or they might be informal targets that you are required to meet.

Service Desk uses three types of agreement:

**Response Agreements (RAs)** – RAs are agreements between the end-user (or customer) and the service desk.

**Operational Level Agreements (OLAs)** – OLAs are agreements between the service desk and other internal groups involved in providing support. For example, the service desk could have an OLA with the procurement department detailing how quickly they will arrange the purchase of new hardware.

**Underpinning Contracts (UCs)** – UCs are agreements between the IT department and external suppliers. For example, you could have a UC with your hardware supplier detailing how quickly new hardware is delivered after receiving a purchase order.

**NOTE:** For detailed information about agreements and Service Level Management, see the LANDesk Service Desk Suite Administrator Guide.

All types of agreement use Response Levels and Escalations.
Escalations

To prevent a breach of a Response Level, Service Desk enables you to set up *escalations* that are active throughout the life of a process. These specify actions to be taken as the process progresses towards the limit of its turnaround time.

When an escalation activates, the colour of the relevant tree node can be configured to change, as well as the colour of the specific process on the appropriate Workload List queries.

**NOTE:** For more detailed information about escalations, see the *LANDesk Service Desk Suite Administrator Guide*.

**NOTE:** Each process can each have their own escalations. In addition, Assignments, Tasks and Task Assignments that are linked to those processes can have their own escalations. If the escalations of the Assignments, Tasks or Task Assignments breach later than those of the processes, then an escalation conflict is indicated with the following icon: 🚨.

Stop Clock

In exceptional circumstances, you may need to stop the process timer in order to deal with issues external to the process that affect the ability to resolve and close the process. For example, you may not have access to a customer site when the process is first logged, which will affect your ability to resolve the issue but should not be measured as part of the process. **Stop Clock** refers to time lost during the process.

You can restart the process timer after all external issues are resolved that affect your ability to resolve a process, but are not part of the process itself.

**To stop and start the clock:**

1. On the *Actions* list, click **Stop Clock**.
   
   The clock stops.

2. To restart the clock, on the *Actions* list, click **Start Clock**.

Parent-child linking

You can link different processes in a one-to-many relationship, linking one parent process to many child processes (Parent-Child linking). This is useful when you identify a root issue that has a number of existing processes raised against it, or if you have a primary process that causes a number of secondary processes.

For example, a company-wide inability to access the Internet or send and receive e-mails may have a root issue Server Down. Alternatively, an electrical surge that caused a fire in the company fuse box may also have caused computer monitors to fuse and the geyser element for the kitchen to blow. You may also need to clean up the powder residue from the fire extinguisher.

**NOTE:** You cannot link a child process to a parent process that has a **Closed** status, and you cannot link two parent processes.

You link related processes together using the parent process Reference Number.

Using Parent-Child linking, you can:

- Resolve or close the parent process, which automatically resolves or closes the child processes that are linked to it.
- Add notes to the parent process, which are automatically copied to all linked child processes.

**NOTE:** Process linking is configured in the **Object Designer** component of Service Desk. For more information, see the *LANDesk Service Desk Suite Designer Guide*.
If you link processes together with child processes, then you can specify that any changes made (or items are added) to the parent item, are automatically reflected to its children. For example, you have an Incident (Incident A) with three child Incidents (Incidents B, C and D). If you add a note to Incident A, then the note is also added (or propagated) to the child Incidents.

**NOTE:** For information about configuring parent-child propagation, see the LANDesk Service Desk Suite Designer Guide.

### Linking processes

If you have accessed a process that you want to use as a primary, or parent, process, then you can link existing processes to it using the Actions list.

If you have accessed a process that you want to use as a secondary, or child, process, then, again, you do so using the Actions list.

**NOTE:** The following procedure describes linking *Incidents* together. You link other processes in a similar way, the only difference being the terminology on the *Actions* list.

#### To add an existing process to the current process:

1. Open the required process.
2. To attach a Child Incident, on the *Actions* list, click **Add Child Incident**, then double-click the required process.
   The Child Incident appears listed in the Children folder on the Incident Tree.
   
   Or, to add the current Incident to a Parent Incident, on the *Actions* list, click **Add Parent Incident**, select the required Incident, then click **OK**.
   The Parent Incident appears listed in the Parent folder on the Incident Tree.
3. **Click OK**.

### Creating a child process for the current process

If you have accessed a process that you want to use as the parent process, you can use the Actions list to create child processes.

**NOTE:** The following procedure describes creating a child *Incident*. You create other child processes in a similar way.

#### To create a child process for the current process:

1. On the *Actions* list, click **Create Child Incident**.
   The Details window appears.
2. Type the relevant information, then click **OK**.
   The new process is automatically linked as a child Incident of the current process.
   The Child Incident appears listed in the *Children* folder in the Process Tree.

**NOTE:** To detach an Incident, on the Incident Tree, select the required child Incident, then on the *Actions* list, click **Detach Child Incident**. This does not delete the child Incident, rather it just removes the link between the two processes.
Understanding resolution and closure

When you have completed all of the activities relating to a process, it can be resolved and closed. Resolution and closure are the two steps that make up the final stage in the process.

Why resolution and closure?

For many service desks, two steps are required to close an incident because there may be a procedural requirement for the analyst involved to sign off incidents internally before a supervisor completes the formal Incident closure.

For example, the Incident process might look like this:

- An analyst receives the original Incident, and records its details, then assigns the Incident to the relevant group.
- The assigned analyst then works on the Incident, and, assisted by the Incident tracking and management features of Service Desk, solves the issue.
- The analyst then resolves the Incident within Service Desk, and informs a supervisor that the Incident has been resolved.
- The supervisor contacts the customer two weeks later to ensure that there have been no further problems, and that they were happy with the service provided.
- If everything is in order, the supervisor sets the Incident status to CLOSED within Service Desk.

**NOTE:** Your service desk may close processes directly without the intermediate resolution stage. Consult your system supervisor for the correct procedure.

Resolving processes

A single process can consist of a number of separate faults or activities, which are represented by Tasks. If a process is subdivided into Tasks, then the service desk must resolve each Task before the process can itself be resolved. This prevents the service desk from resolving a process while it still has outstanding activities.

If you try to resolve a process that has unresolved Tasks, an error message appears. To resolve a Task, open the corresponding Task window, then in the Actions list, click Resolve.

When all of a process’s Tasks are resolved, the process itself can be resolved.

**NOTE:** We recommend that you provide as much detail as possible in the Resolution window, so that the information can be used to resolve future processes.

You can continue to add notes and reminders to resolved processes.

To resolve a process:

1. On the Actions list, click **Resolve**.
   
   The Resolve window appears.
2. Type the relevant information, then click .
   The Actions list changes. The only available actions are Close and Unresolve.

When a process is resolved, its status changes on the Process window. You can run queries against closed processes, although you may find it convenient to use the process status to narrow the search criteria.

Your system might have been configured so that resolved processes are automatically assigned to a specific analyst, group or role (for example, a Quality Assurance group).

**NOTE:** For information about assigning processes, see Assigning processes and tasks on page 26.

### Unresolving processes

You might need to unresolve a process if an issue recurs before the process is closed.

**To unresolve a resolved process:**

1. View the resolved process that you want to unresolve.
2. In the Actions list, click Unresolve.
   The Unresolve window appears.
3. Type the reason why you are unresolving the process, then click .
   The process unresolves.

### Closing a process

When a process is resolved, the final step is closure. You can also close a process directly without going through the resolution stage, although this depends on how your service desk is organised.

**NOTE:** All tasks must be resolved before you can close a process.

In a two-stage resolution and closure process, closure is likely to require additional privileges to process resolution because closure represents the end of the progression of a process. A process is closed when all parties are satisfied, so your company might require some procedural sign-offs to ensure that the customer is satisfied with the resolution of their issue.

**To close a process:**

1. On the Actions list, click Close.
   The Close window appears.
2. Type the relevant information, then click ReOpen.
   The Actions list changes. The only available action is ReOpen.

**Reopening a process**

Occasionally, it may be necessary to reopen a process that is already closed. Reopening a process usually occurs only in exceptional cases, therefore this privilege is usually available only to supervisors.

**To reopen a closed process:**

1. View the closed process that you want to reopen.
2. On the Actions list, click ReOpen.
   The ReOpen window appears.
3. Complete the relevant information about why you are reopening the process, then click .
   The process reopens and you can now modify it.

**Generating Word documents from your processes**

You can generate documents based upon the processes that you create in Service Desk. You can send these documents to your customers to inform them of pertinent information regarding their issue. For example, you can generate a progress document containing specific information generated from an Incident.

Before you can generate these documents, your system administrator will have created a template containing static information, and references to the process. This is defined in the Administration component of Service Desk.

**NOTE:** For more information, see the *LANDesk Service Desk Suite Administrator Guide.*

**To generate a document from a process:**

1. Raise a process as you would normally, or open an existing process.
2. On the Actions list, click Create Document.
   The Create Document window appears.
3. In the **Title** box, type the name for the document, and in the **Template** list, select the template upon which you want to base the document.

4. Click ⬤. Notice that the Actions list changes.

5. On the **Actions** list, click **Generate**. The XML document is generated and the file name is listed in the Document group box.

**NOTE:** To view the generated document, click **Open**. The document opens in Microsoft Word, and you can then save it in the required format so that you can send it to your customer.

**NOTE:** You do not necessarily need to generate each document manually, the Service Desk Background Service will automatically generate the non-generated documents each time the service runs. For information about configuring the Service Desk Background Service, see the *LANDesk Service Desk Suite Setup Guide*.

### Searching for processes and other items

If you know what you are searching for, then the Quick Lookup toolbar enables you to search for an instance of a Process, User or Customer.

To search for items:

1. In the **Open** list, select the item that you are searching for.
2. In the **Reference** box, type the required information, then click ⬤.

Another way to search for a specific process is to use queries. Depending on your privileges, you may be able to view existing processes but not modify them.

**NOTE:** For more information about setting up queries and reports, see the *LANDesk Service Desk Suite Designer Guide*. 
Using queries and reports to view your Workload list

You will have a set of standard queries published to you that may include standard process queries and Workload Lists that list the processes that have been assigned to you.

If you have the relevant privileges to create queries, then you can add these queries to your Shortcut Bar using the Query and Report Designer component. For information about designing queries, see the LANDesk Service Desk Suite Designer Guide.

Including standard information in a process

Templates can be created to include standard information, including pre-configured notes, assignments, response agreements and so on, to enable you to log processes quickly and effectively. A Template and its linked process provide a standard structure for a process and can contain process components, actions and settings. For example, you can set up populated fields on the Details window, automatically create notes and automatically assign the process.

Templates can revolutionise how quickly your service desk deals with processes. For example, Reset Password. Templates can also be used to speed up the initial logging of processes, so that they get assigned to the correct people quickly, for example, to a Triage support group.

NOTE: For information about creating templates, see the LANDesk Service Desk Suite Designer Guide.

After you capture and save this generic information, various actions are made available, including the ability to switch process. The ability to do this may have been configured to be available to you at a specific status of a process. When the process reaches the particular status, the Reinitialise action appears in the Actions list.

To reinitialise a process template:

1. Log an instance of a process in the usual way.
   At the status where you are allowed to change the process, the Reinitialise action appears in the Actions list.
2. In the Actions list, click Reinitialise.
   The Switch Process dialog appears.
3. Using the lists, select the process and template to which you want to switch, then click OK.
   The process and template change.
Using queries to find information

Service Desk uses queries to enable you to find information from the database. These queries are designed using the Query and Report Designer (for more information, see the LANDesk Service Desk Suite Designer Guide), and are available to analysts either through the Shortcut bar, or through the dashboard.

Running queries

You can access query results lists either from a dashboard, or by clicking their shortcut in the Shortcut bar. From a dashboard:

- double-clicking a gauge or count panel opens the corresponding query results list
- double-clicking a specific bar on a bar chart or sector on a pie chart displays the results that correspond to that bar or sector
- double-clicking the background of a bar chart or pie chart displays the grouped query results for the chart
- clicking a shortcut to a query displays the corresponding query results list

Query prompts

Some queries display prompts when they are run to enable you to specify criteria that limit the results that are returned. For example, the standard Incidents by Status query prompts the user for a Creation Date range, a Status, and a Current Assignment User and Group. This enables you to choose, for example, the Incident Status of Open, so that only incidents at that status appear in the results list.

NOTE: You can complete any number of the prompted criteria. If you do not enter a value for a criterion, then it is ignored.

There are two ways in which query prompts are displayed, which is configured as part of the query design: grid layout or simple list.

To complete a grid layout query prompt:

1. Run the required query.
   The grid layout prompt appears, displaying all of the criteria that you can supply in a grid.

   ![Incidents By Status Grid Layout](image)

   2. Enter the required **Value** for the criteria, then click **Go**.
      The query results list appears.

To complete a simple list query prompt:

1. Run the required query.
   The simple list prompt appears, displaying all of the criteria that you can supply in a list, with the current values set to **Prompt User**.
2. To specify a value for a criterion, select it in the list. The prompt dialog displays further fields to enable you to set the value.

3. Enter the required **Value** for the selected criterion.

4. Select and repeat for any other criteria that you want to set, then click **Go**. The query results list appears.
The query results list

Whether you run a query from the Shortcut bar, or from a dashboard, the query results list has the same features:

1 – the **Actions** list provides access to all actions for query results, including enabling you to progress processes directly from the query results list. For more information, see *Progressing processes from query results* on page 40.

2 – the **Filter Panel** is accessed by clicking ![Filter Panel](image). The Filter Panel enables you to modify the criteria that specify which records are included in the results list. For more information, see *Filtering queries* on page 41.

3 – the **Grouping Panel** is accessed by clicking ![Grouping Panel](image). The Grouping Panel enables you to group the results list by specific attributes. For more information, see *Grouping queries* on page 42.

These first three features are found on the **Query Results** panel, which you can show and hide using the ![icon] icon.

4 – the results list is where the results of the query appear. The paging controls at the bottom enable you to move through a large set of results. If the query has been designed to enable records to be opened from the results list, then double-clicking a row in the results list opens the selected record. Pressing F5 refreshes the results list. Holding SHIFT, then dragging a column’s title to a new position changes the order of the columns in the list. Some queries are designed to provide a preview of further information related to the selected row beneath the list.

**NOTE:** If you have the appropriate privilege, you can use the **File\Save As** menu option to save a copy of a changed query.
Progressing processes from query results

If a query results page comprises a list of processes, then if you select a row in the list, the currently available actions for the selected process appear at the bottom of the Actions list for the query.

NOTE: Optional actions appear below the splitter.

If the action has a window associated with it, then the window appears when you click the action. When you complete the window, the query results list updates.

Creating new items from a query results list

For some objects, you can create a new instance of the object that a query is based on directly from a query results list. This functionality is most useful for processes, CIs, and users. For CIs and users, the instance that is created is of the same type as the CI or user selected in the query results list. For example, if you have a list of users, and right-click an analyst in the list, then an analyst window appears when you click New.

NOTE: You cannot create a new item if the query is based on an external data source or an external connector. You also need to have the appropriate Create privilege.

To create a new item from a query results list:

1. Run the required query.
2. Select a row in the query results list, then in the Actions list, click New.

The default window for the object that the query is based on appears, enabling you to create a new item. For example, if you are using the All Incidents query, a blank Incident window appears.

NOTE: Alternatively, right-click a row in the query results list, then click New.
Sorting results and hiding columns

In certain circumstances, a query can return a large amount of data. Service Desk provides a number of features to help you to manage this data, including query filtering (see Filtering queries on page 41), and grouping (see Grouping queries on page 42).

However, managing the data can sometimes just involve hiding columns that are of no interest, or sorting by a specific column.

- To hide a column in the results list, right-click the column that you want to hide, then click **Hide Column**. The column is removed from the results list.
- To sort a query results list by a specific column, right-click the column that you want to sort by, then click **Sort Ascending** or **Sort Descending** as required. The column sorting updates and the icon \( \uparrow \) (ascending) or \( \downarrow \) (descending) is added to the column header.

Filtering queries

The results returned by a query can be reduced by specifying criteria that need to be met by a record before it is included in the results list. For example, to include incidents only when their status equals Open. These criteria are often specified as part of the query design, but you can also modify the criteria when you run the query using the Filter Panel.

To add a filter to a query results list:

1. Run the required query.
2. Right-click the cell containing the value that you want to filter by, then click **Filter By**: \textit{value}.

The results list updates to display only records that match the selected value, and the new criterion appears at the bottom of the Filter Panel.
NOTE: You can also add filter criteria using the fields on the Filter Panel.

NOTE: You can modify criteria that you have added yourself by selecting the required criterion at the bottom of the Filter Panel, and then using the Modify or Remove buttons. You cannot change any criteria that are part of the original query design.

NOTE: If you have the required privileges, you can save a copy of the changed query by clicking the File menu, then clicking Save As.

Grouping queries

You can group together query results that have the same value for a specified attribute. For example, if you have a list of incidents that are at different statuses:

<table>
<thead>
<tr>
<th>ID</th>
<th>Title</th>
<th>User</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>Title 1</td>
<td>User 1</td>
<td>Open</td>
</tr>
<tr>
<td>002</td>
<td>Title 2</td>
<td>User 2</td>
<td>Open</td>
</tr>
<tr>
<td>003</td>
<td>Title 3</td>
<td>User 3</td>
<td>Closed</td>
</tr>
<tr>
<td>004</td>
<td>Title 4</td>
<td>User 1</td>
<td>Open</td>
</tr>
<tr>
<td>005</td>
<td>Title 5</td>
<td>User 3</td>
<td>Closed</td>
</tr>
</tbody>
</table>

You can group them according to that status:

<table>
<thead>
<tr>
<th>ID</th>
<th>Title</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open (3 items)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>001</td>
<td>Title 1</td>
<td>User 1</td>
</tr>
<tr>
<td>002</td>
<td>Title 2</td>
<td>User 2</td>
</tr>
<tr>
<td>004</td>
<td>Title 4</td>
<td>User 1</td>
</tr>
<tr>
<td>Closed (2 items)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>003</td>
<td>Title 3</td>
<td>User 3</td>
</tr>
<tr>
<td>005</td>
<td>Title 5</td>
<td>User 3</td>
</tr>
</tbody>
</table>
The group header contains the number of items in the group. You can expand and collapse groups by clicking the + and − icons in the group header.

Grouped queries can also be designed to include a footer for each group that reports, where appropriate, the minimum, maximum, mean, and sum of the values for any of the attributes in the query.

You can change the grouping for a query when you view the results.

**To edit query grouping from the results list:**

1. Run the required query.
2. At the bottom of the **Query Results** panel, click the Grouping Panel button.

   ![Grouping Panel](image)

   The Grouping Panel appears, showing the current groupings.

3. To change the sort order of a group, double-click it in the **Grouping Panel**.
   The icon for the group toggles between ↓ and ↑.
4. To change the grouping order, right-click a group in the **Grouping Panel**, then click **Move First**, **Move Up**, **Move Down**, or **Move Last** as appropriate.
   The group order in the Grouping Panel updates.
5. To remove a group, right-click it, then click **Remove**.
   The group is removed from the Grouping Panel.
6. To add a new group, in the **Attribute** list, select the required attribute.
   The new attribute is added to the bottom of the list in the Grouping Panel.
7. Click **Apply**.
   The query results update.

**NOTE:** Alternatively, you can change the grouping order by dragging the groups up and down in the Grouping Panel; you can add new groups by dragging attributes from the results list header to the required position on the Grouping Panel; and you can remove groups by dragging them off the Grouping Panel onto the results list.
Exporting query results

You can export a query results list either to Microsoft Excel, or to a .CSV format file, which you can then open in a text editor.

To export query results:

1. Run the required query.
2. In the Actions list, click Export Query Results.
   The Row Selection Criteria dialog appears.

3. Select the required Export Type: **CSV** or **Excel**.
4. Specify the required Selection Range:
   **All** – exports all of the data.
   **Current** – exports the data on the current page; this option works best for ungrouped queries - for grouped queries it exports groups that have been expanded.
   **Selected Row** – exports the selected rows (you can select multiple rows in a query by holding CTRL while clicking); if you select a group header and a row in that group, the selected row will appear twice in the export - once as part of the group, and once on its own.
   **Range** – exports the range of rows specified, counting from the top of the results list.
   **List** – exports the rows specified. You can use commas to separate entries in the list, or specify a range in the list, using the – character.
5. If you are exporting to **CSV**, specify the Export File Name.
6. Click **OK**.
   The data is exported; if you chose to export to Excel, then Excel opens displaying the results.

**NOTE:** If you export a query that you have hidden columns in, you are asked whether or not you want to include the hidden columns in the exported file.
Performing a bulk action on a set of query results

You can perform bulk actions on the results of a query. For example, you can add a note to many Incidents at one time, or stop the clock for a number of changes and so on.

**NOTE:** The bulk action ignores any additional filters after running the query, but is applied to the original query results list. If you want to use bulk action on a query results list that you have modified, first save the modified query.

You can perform Bulk Actions immediately, or you can schedule when you want them to occur. You may choose to schedule Bulk Actions if you are applying an action to a large number of items.

**NOTE:** We recommend that if you are performing a bulk action on a large number of items, that you schedule it to take place overnight so as not to disrupt other users of the system. For information about scheduling bulk actions, see *Scheduling bulk actions* on page 47.

To perform a bulk action on a set of query results:

1. Run the relevant query, then on the Actions list, click **Bulk Action**. The Bulk Action dialog appears. The Module, Business Object and Query name are all greyed out, as these are defined within the query itself.
2. Expand the Action list and select the relevant action. For example, **Add Note**.
3. Click **Next**. If the action has a window associated with it, for example **Add Note, Add Assignment** and so on, then the relevant window appears within the wizard. If no window is associated with the action, go to step 5.
4. Complete the relevant information, then click **Next**.
   The Bulk Action Confirm page appears.

   ![Bulk Action Confirm](image)

5. Click **Apply**.
   The action is performed immediately on the query results, and a results list appears.
   In the following example, there is one failure, that is because the Incident was at the Closed status when the action was performed, and therefore, an Attachment could not be added.

   ![Bulk Action Results](image)

6. If there are failures in your Bulk Action Results, in the **Filter** group box, select the **Failed** option button, to view the error message.
7. Click Close.

**Scheduling bulk actions**

You can perform bulk actions on the results of a query. For example, you can add a note to many Incidents at one time, or stop the clock for a number of changes and so on.

**NOTE:** You must refine your query such that only the items that you want to perform the action on are returned, as you cannot select single (or multiple) items from the query results. The bulk action is applied to *all* of the items within the query results.

You can perform Bulk Actions immediately, or you can schedule when you want them to occur. You may choose to schedule Bulk Actions if you are applying an action to a large number of items.

If you want to apply a bulk action to a large number of items, or to perform it at regular intervals, you can schedule when the action occurs. You schedule bulk actions using the **Schedule Manager** component of Service Desk.

**To schedule a bulk action:**

1. Start the **Schedule Manager** component.
2. On the **Bulk Action Management** tree, select the **Schedules** folder, then on the **Actions** list, click **New Scheduled Bulk Action**.
3. Type a **Name** and **Description** for the bulk action.
4. In the **Schedule** group box, specify the data and time that you want the bulk action to take place, and, if required, in the **Recurrence** list, select how often you want the bulk action to occur.
5. In the **Bulk Action** group box, select the required **Module**.
   The Business Object list becomes active.
6. Select the **Business Object** and **Query**.
   For example, **Incident Management | Incident | Open Incidents**.
7. Expand the **Action** list and select the relevant action. For example, **Resolve**.
8. If the action that you have selected has a window associated with it, click **Window Data**.
9. If the action that you have selected has no window associated with it go to step 10.
   The relevant window appears.
10. Complete the required information, then click **Finish**.
11. **If no window is associated with the action, then click**.
The action will be performed when scheduled, and the Schedule appears on the Bulk Action Management tree.

**NOTE:** If required, you can modify both the schedule time, and the data specified in the window. On the Bulk Action Management tree, select the required schedule then on the Actions list, click Modify Scheduled Bulk Action or Modify Scheduled Bulk Action Values as required. You can also Deactivate schedules (from the Actions list) if you want to suspend the bulk action, but don’t want to delete it. When you deactivate a schedule, the icon changes from to on the tree. You can then reactivate it as and when required.

**Bulk action query**

You can, if required create a query that is run when you start Schedule Manager. This query can list all of the scheduled actions, and is based upon the System | Scheduled Action business object.
Index

A
actions .................................................. 20
assignments ........................................... 25
notifications .......................................... 26
reassigning processes ............................. 26
Actions list ........................................... 10
assignments ........................................... 25
  adding .................................................. 26
  notifying assignee and originator ............. 26
reassignment ......................................... 26
attachments ......................................... 28
  adding .................................................. 28
  saving .................................................. 29
  sending ............................................... 29
audit trail ........................................... 11

B
bulk actions .......................................... 47
query .................................................... 48
query results ......................................... 45
  scheduling .......................................... 47

C
categories ............................................ 20
clock
  stop/start ............................................ 30
closing
  processes ........................................... 32-33
  reopening closed processes .................. 34
complex lists ........................................ 13
components ......................................... 20
attachments ........................................ 28
notes ................................................... 21
reminders ............................................ 27
task notes ............................................ 24
tasks ................................................... 22
configuration items
  using in tasks ...................................... 24
correcting spelling as you type .................. 15

D
Details window ....................................... 10, 19
categories ............................................ 20
  related attributes .................................. 20
documents
  generating from processes ...................... 34

E
escalations ........................................... 30
exporting
  query results ....................................... 44

F
F5 .......................................................... 39
filter panel
  queries ............................................... 39, 41
filtering
  queries ............................................... 41
finding
  processes ........................................... 35
formatting toolbar .................................. 11

G
generating documents .............................. 34
grouping
  queries ............................................... 42

H
hiding columns ..................................... 41
history ................................................ 11
HTML
  toolbar .............................................. 11

I
integrated login .................................... 12

K
keyboard access .................................. 6
LANDesk Service Desk Console

workspace ........................................ 9
linking .............................................. 30
adding notes ...................................... 30
child to parent .................................... 31
creating child process ......................... 31
detaching child processes ..................... 31
Parent to Child .................................. 31
lists .................................................. 13
login
integrated ......................................... 12

notes ................................................ 21
adding ............................................. 21
parent-child linking ......................... 30
Notify
assignee ......................................... 26

optimistic locking ................................ 13

paged list controls
using ................................................ 19
Parent-child linking ............................ 30
adding current to parent process .......... 31
adding existing to current process ........ 31
adding notes .................................... 30
creating child for current process ........ 31
detaching child processes .................. 31
reminders ......................................... 30
passwords
changing ......................................... 12
privileges ......................................... 12
process actions .................................. 20
adding an assignment ......................... 26
assignment ....................................... 25
notifying about assignment .................. 26
reassignment .................................... 26

process components ............................ 20
adding notes ..................................... 21
attachments ..................................... 28
notes ............................................... 21
reminders ........................................ 27
task notes ........................................ 24
tasks ................................................ 22

Process Details window ....................... 10
processes ......................................... 8
actions ............................................ 20
attaching files to ................................. 28
categories ........................................ 20
closing ............................................ 33
components ...................................... 20
logging from a query ......................... 40
logging processes ............................. 19
progressing from queries .................. 40
related attributes ............................. 20
resolving .......................................... 32
using the spell checker ...................... 14
view supplied queries and reports .......... 36
prompts
queries ........................................... 37
propagation
about ............................................. 31

queries .......................................... 35-37
bulk actions .................................... 45
create items from ............................... 40
exporting results ............................... 44
filter panel ...................................... 39
filtering .......................................... 41
grouping ......................................... 42
grouping panel .................................. 39
progressing processes ...................... 40
prompts .......................................... 37
refreshing results ............................. 39
results list ........................................ 39
running .......................................... 37
sorting ............................................ 41
workload lists ................................... 36
quick lookups .................................... 35
reassigning processes ......................... 26
related attributes ................................ 20
relationships
  one-to-many ................................... 30
reminders ....................................... 27
  adding ......................................... 27
  parent-child linking ........................... 30
reopening processes ............................ 34
reports .......................................... 36
resolution ....................................... 32
  unresolving processes ....................... 33
resolving processes ............................ 32
  parent-child linking ........................... 30
response agreements ........................... 29
  stop clock ................................... 30
response levels .................................. 29
  escalations ................................... 30
rules
  many users updating fields together ..... 13
saving attachments ............................ 29
scheduling
  bulk actions .................................. 47
scheduling bulk actions
  deactivating ................................. 48
  deleting ..................................... 48
  modifying ................................... 48
searching
  for processes ................................ 35
sending attachments ........................... 29
ServiceDesk
  customising the workspace ................. 11
  privileges ................................... 12
Shortcut bar .................................... 9
simple lists ..................................... 13
sorting
  query results ................................ 41
spell checker
  about ......................................... 14
  as you type spell checking .................. 15
  using ......................................... 14
  start clock ................................... 30
  stop clock ................................... 30
supplied queries and reports ................. 36
tabs ............................................... 10
tasks ............................................ 22
  completing ................................... 24
  configuration items .......................... 24
  creating with an associated process ....... 23
  task notes ................................... 24
  unresolving ................................... 24
templates
  reinitialise ................................... 36
toolbar
  formatting .................................... 11
unlinking ........................................ 31
unresolving processes ......................... 33
updating different fields at the same time
  rules ......................................... 13
users
  changing their own password ............... 12
  using the spell checker ..................... 14
Workspace lists .................................. 35-36
workspace
  customising ................................... 11