Supportworks Hints, Tips and Best Practice Working



ICT Training & Development



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Supportworks Incident Logging Screen

Logging a new call

SE Customer Details	Ac	ns 🗸 🕅 Settings	
Organisation Customer ID Customer Name Main Site Tel. No. E-Mail @ Extension Mobile Availabilty Contact Method	Profile Ste Address Job Role : Group Group Bus Unit Service Status Notes Active Requests : Cosed Requests : Cos	SLA [Use Customer SLA] Organisation [Use Customer's Org Impact Current Ste [The site at which in Urgency Vice SLA Default Priority] Contract Priority [Use SLA Default Priority] Contract Default Priority Contract Priority [Use SLA Default Priority] Contract Priority [Use SLA Default Priority] Priority [Use SLA Default Priority] Contract Priority [Use SLA Default Priority] Priority [Use SLA	anisation) V ident occ V V
Description	Alen Find Sc	ion• A Services and Items	View *
Profile Click on this field to bro	wse for and select a profile for this incident	Filter Services and Items V by Customer	V
Summary		ID A Description Sta	tus Ty
Details			

What must be completed

- Fields with red corner are mandatory and **MUST** be completed
- If customer is not at usual site use the **Site address tab** to specify their temporary location
- SLA, Impact and Urgency need to be completed (choose SLA first)
- Link Services item to the call. A configuration item also needs to be selected if a non schools call.
- **Profile** needs to be completed—just click in the field to activate
- Summary—please complete this with a short but concise sentence on what the call is regarding
- Details—complete this with full details of the incident including any error messages

Associating Configuration and Service items to an incident

Configuration Items

This could be either the physical hardware or software the Customer is

	File Edit Actions Show	Me Tools Help				
ŧ	🖑 👻 🖉 Log 💩 Log & Assig	gn 🔥 Log & Take 🔏 I	og & Accept 🛛 💋 l	.og & Resolve/Close 🛛 🧕) 🖑 🛒 📿	
	Details Associated in	rormation 📑 File Att	achments 🔂 R	esolve/Close Details		
	Affected Configuration Items	Affected Services	Problem / Know	n Errors Change Req	uests Service Requests	Knowledgebase Documents View Actions Search
	Configuration ID	Туре	Status	CMDB Status	Description	Impact Level

reporting against.

Search Criteria					4
Configuration ID Type s active baseline?	Click here to select type Yes		Organisation Owner Name		V
dvanced Search			Search Mode :	All of the above match	Search Reset
Configuration Item ID	Type	Status		CMDB Status	Description
4					
Add to Selection			Add N	ew View -	elect Cancel

Go to Associated Information tab and click Search

Type **Config id** in first field (you can use % as a wildcard), click **Search** then click **Select**, config item is now added!

No Configuration id?

Follow the same process but type in the configuration id of "CI not found"

Services (from the service catalogue)

This is again done through the **Associated Information** Tab but this time click on the **affected services** tab

File	Edit Actions Sho	w Me Tools Help					
i 🥠 -	🖌 🧷 Log 💩 Log & As	sign 🔏 Log & Take 🔏 Log & A	ccept 🛿 🥩 Log & Resolve/Close	0 🖑 🛒 🤉			
De	etails 🗎 Associated	Information 📳 File Attachme	ents 🛃 Resolve / Close Details				
		[e					
Af	fected Configuration Iten	ns Affected Services Prob	lem / Known Errors Change Re	quests Service Rec	quests Knowledgeb	ase Documents	- P
	View Actions Search						
S	ervice ID	Service Name	Туре	Status	CMDB Status	Impact Level	Ur

Click on Search

Configuration ID					
Description					
otatus					
Туре					
CMDB Status					
s active baseline?	Yes		v		
Allow Support	Yes		V		
			Se	arch Mode : All of the ab	ove match V Res
Search Results Res	ult Selection Description	Туре	Se	arch Mode : All of the ab	ove match V Res
Search Results Res	ult Selection	Туре	Status	CMDB Status	ove match V Res

Type service in the Description field

Click search

Click Select

Service is now added!

Note: Service and Configuration items can be added at any point during the lifespan of the call. If these have changed between the call having been logged and closed, it is the responsibility of the team closing the call to add the most relevant Service/Configuration item to the call before closure.

Searching

Finding

This can now be done through using these options from the Supportworks Today screen

Customers	Search For Requests	
Search : Browse	Search : Free Text Search	Or
Search for Customers	Search For Requests	
Customer ID	Reference	
First Name	Customer ID	
Last Name	Customer Name	
E-Mail	Group	
Organisation	Business Unit	
Charge Centre	Support Group	
Main Site	Owner	
Postcode	Charge Centre	
Tel. No.	Current Site	

You can search either by Customer Or By Request Reference

If searching by Customer you can also view their call history;

Customers	Search Results (1 it	ems)		Close
Search : Browse Search for Customers	LROB3	Lisa	Robinson	lisarobinson@warwick
Customer ID Irob3 First Name		III		
Last Name E-Mail	Actions	🔟 Log New Call 👸 Print This Page		
	Customer Del	tails For LROB3		Other Information

Double click on the results for the Customer (highlighted in Red)

Customer Details	Other Details Training Associated Reg	uests Config	uration Items Servic	e Desk Access			
Incidents Proble	ems & K.Es (reported by) Change Requests	Service Rec	quests				Log New 🔻
Reference	Summary	Status ▲	Impact Level	Urgency Level	Owner	Support Group	Custo 🔺
F1183661	Booking for Robots - Birmingham based	Resolved	Sc-PDC Training	Sc-PDC Training	HWOO	SICTDEVSER/BUSDE	Lisa R(
F1184475	Course booking - Exams workshop July	Resolved	Sc-PDC Training	Sc-PDC Training	RVAL	SICTDEVSER/BUSDE	Lisa Ro
F1184779	Email	Resolved	Sc-Standard	Sc-Standard	LROB3	CUSTSUPP/ICTSERVI	Lisa Ro
F1185017	Training course - Social Networking for	Resolved	Sc-PDC Training	Sc-PDC Training	CBIC	SICTDEVSER/BUSDE	Lisa Ro
F0302788		Closed	Medium	Medium	RSCA	SYSTEMS/APPS/	Lisa Ro
F0303166		Closed	Medium	Medium	SMAR5	PRODSERVICES/OP	Lisa Ro
F0303224		Closed	Medium	Medium	ASHA1	PRODSERVICES/OP	Lisa Ro
F0303782		Closed	Medium	Medium	Jtom1	NETMANAGE/LAN/	Lisa Ro
F0303788		Closed	Medium	Medium	PJAR	NETMANAGE/VOICE/	Lisa Ro
F0305511		Closed	Medium	Medium	LROB3	CUSTSUPP/ICTSERVI	Lisa Ro

Click on the Associated Requests tab.

All calls that the Customer has logged will be displayed for you to view and go into.

At this point you could also choose to log a new incident by using the button that is further along the menu

ncidents Prot	lems & K.Es (reported by) Change Requests	Service Re	quests					Log Ne
Reference	Summary	Status ▲	Impact Level	Urgency Level	Owner	Sup	Incident	
1183661	Booking for Robots - Birmingham based	Resolved	Sc-PDC Training	Sc-PDC Training	HWOO	SICT	Problem	
1184475	Course booking - Exams workshop July	Resolved	Sc-PDC Training	Sc-PDC Training	RVAL	SICT	Change R	equest
1184779	Email	Resolved	Sc-Standard	Sc-Standard	LROB3	CUS		
1185017	Training course - Social Networking for	Resolved	Sc-PDC Training	Sc-PDC Training	CBIC	SICT	Service Re	equest
0302788		Closed	Medium	Medium	RSCA	SYS M	S/APPS/	Lisa Ro
0303166		Closed	Medium	Medium	SMAR5	PROI	0.0000	
0303224		Closed	Medium	Medium	ASHA1	PRODSE	RVICES/OP	Lisa Ro
0303782		Closed	Medium	Medium	Jtom1	NETMAN	AGE/LAN/	Lisa Ro
0303788		Closed	Medium	Medium	PJAR	NETMAN	AGE/VOICE/	Lisa R
0305511		Closed	Medium	Medium	LROB3	CUSTSU	PP/ICTSERVI	Lisa Rr
F0306392		Closed	Medium	Medium	LROB3	CUSTSU	PP/ICTSERVI	Lisa R

This will start a new call with the Customers details already filled in for you.

Updating Calls

This is done in the usual way (through the call update tab of the call) One thing to note is that you can choose whether the update you enter is to be made Public or not. Items left as Public are available to the Customer to view through Self Service.

Options	
Vpdate to be public	
E-mail customer	
✔ Mark as SLA response	

Accepting calls

It is best practice to accept any call you are working on. This means that you are then responsible for this call and any updates. You will also receive e-mail notifications when a call you are working on has been updated by someone else.

Assigning calls

If you cannot resolve a call and it needs to be passed to another team—only assign to Team Level (not individuals) unless prior agreement has been made. This prevents calls from being left unmonitored.

👷 Resolve/Close Call F0610748	0	
File Edit Actions Tools Help		
✓ B) 8		
🖋 Resolve Call Call Action	n: Resolve Call	
Details		Options
Date/Time of Action	Time Spent	Update to be public
Action Source	Action Type	Call to be chargeable
Telephone	General Update	Add to KnowledgeBase
Resolution Profile		First time fix achieved
		Send customer survey:
Follow Up Action		
Service Improvement - What could be the next action with this call?	V	
Apply this action to related requests (incident / known errors etc)		
Other Information		
Description File Attachment Support Units		
· · · · · · · · · · · · · · · · · · ·		

Resolving calls

The following fields must be completed on Resolution of calls

Full details of Resolution needs to be entered into the Description tab before saving. Remember the customer will receive an e-mail containing this text so it needs to make sense.

Calls will be closed automatically 5 days after initial Resolution.

Hints and Tips

Configuration Database		
Image: Searches Image: Searches Image: Searches Image: Searches Image: Searches		
	Show More Buttons Show Eewer Buttons Add or Remove Buttons	 Supportworks Today Service Desk Change Schedule E-Mail Customers Organisations Configuration Database Search For Requests Database Searches
🔉 • Want t	o customise your Navi	igation tabs?

You can then either select - Show Fewer Buttons (to display the tabs as icons in the bottom row)

To put these back as tabs then use the Show More Buttons option.

🥡 Supportworks Today							
🅢 🧐	炎 Service Desk						
🔐 Change Schedule							
ا 🐨	E-Mail						
1	Customers						
())	Organisations						
	🧟 🏈 🧊 🧭 💐						

Or remove the tabs you don't want to see by going into Add or Remove Buttons and un-ticking those you don't require (you will be able to put them back on in the same way if ever needed!)

Customise your Service Desk View (full Supportworks version only not web client)



You can filter those calls displayed in your view by status;

🕅 My Incidents (22) 🛛 🥒 My Major Incidents (0) 🖉 My Incoming (5) 🖉 My UAR (0) 🖉 My School Incidents (2)					
ly Incidents (22) (Filtered: Active)					Active
с	Reference	Summary	Status	Logg	[No Filter]
	F0613262		Off Hold	09/03	Escalated
EDS will be decommissioned on 31 March, 2011. As part of the process of decommissioning the Educational Development Service I would like to inform the correct people the					On Hold Off Hold Resolved
	F0615167		Unassigned	23/03	Major Incidents
Gettina ooo reminder messaaes for lotus notes 8001121. ooo is note on. 07557114083 Also Nickv Enticknap 802282 (nent)					Active - Excl. Schools

- Where appropriate calls can be put on hold (e.g. customer is away from the office for an extended period) this stops the clock and helps meet SLA's. Right click call and select Place Call on Hold.
 Enter a date and time to restart the clock (usually when customer is back) and a reason for putting call on hold. The call will then disappear from your Active calls queue but can be found using the status filter view and selecting On Hold. Once the time has passed the call will automatically reappear in your Active calls queue as Off Hold and will need to be reaccepted .
- You can use the Drag and Drop facility to assign calls between teams. Drag from your queue to another teams queue.

• Want to keep your eye on a call, use the Watched calls facility;

To Add to list

Right click on call and select

To remove from list

Right click on call (now shown in your Watched calls tab) and select





For more information on available courses (and more hints, tips and FAQs) visit: warwickshire.learningpool.com

For support please contact the ICT Service Desk using the 'Service Desk Online' icon on your PC desktop or, if you have a problem to report, call on **01926 41 41 41**

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