Supportworks
Hints, Tips and Best Practice Working

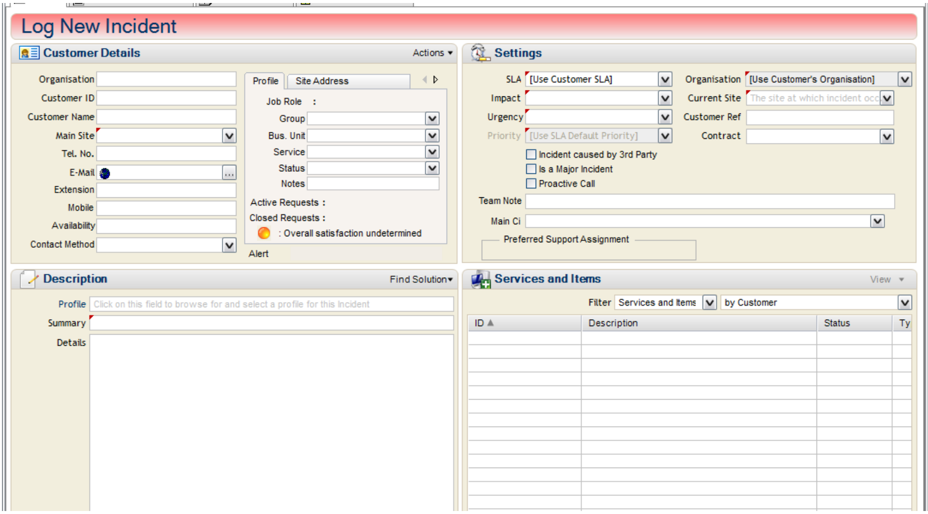
ICT Training & Development

Warwickshire County Council

Contents

Supportworks Incident Logging Screen

Logging a new call



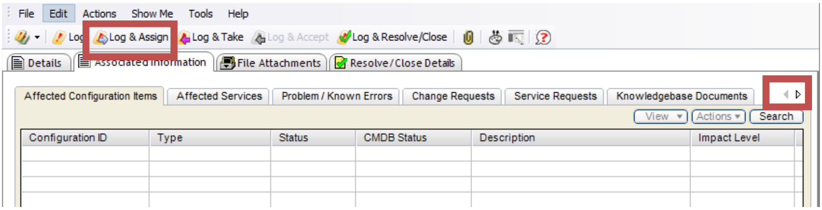
What must be completed

- 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

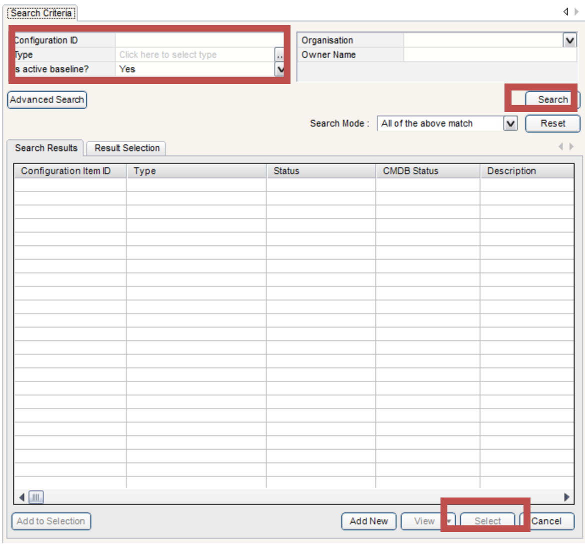
Associating Configuration and Service items to an incident

Configuration Items

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



reporting against.



Go to **Associated** Information tab and click **Search**

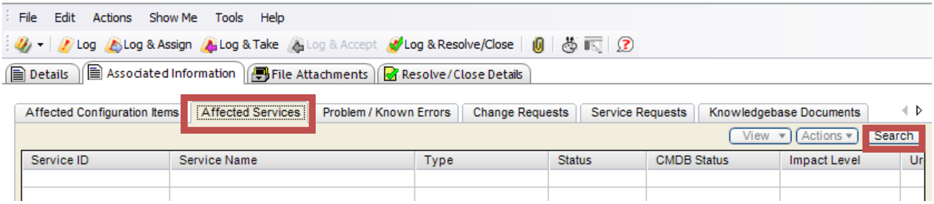
Type **Config id** in first field (you can use % as a wildcard), click **Search** then click **Select**, config item is now added!

No Configuration id?

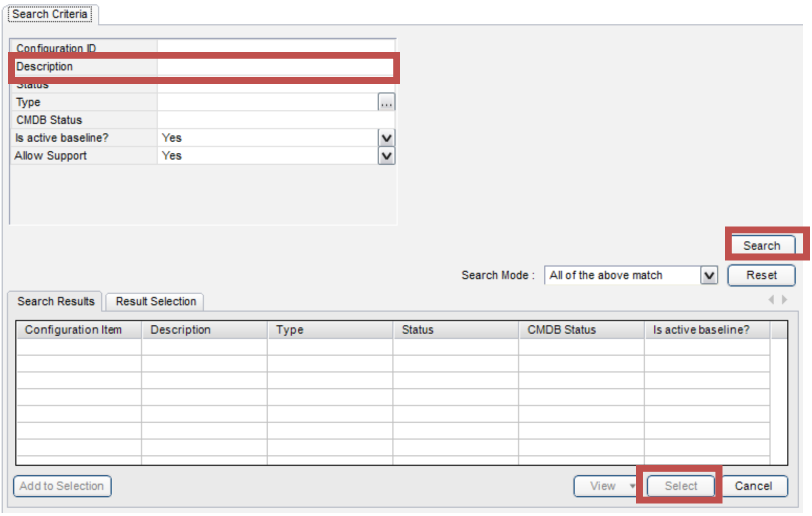
Follow the same process but type in the configuration id of **"CI not found"**

Services (from the service catalogue)

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



Click on **Search**



Type **service** in the **Description** field

Click **search**

Click **Select**

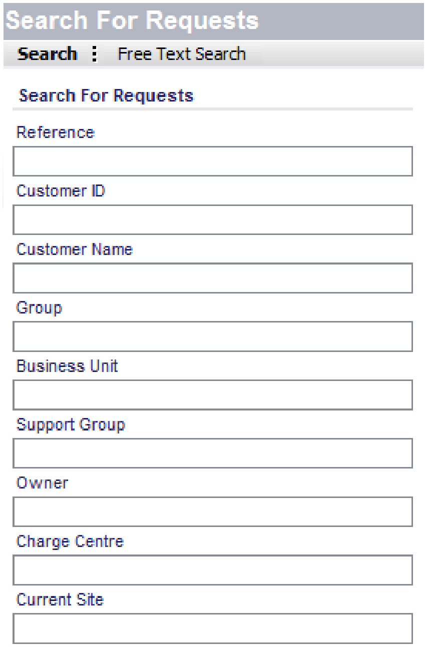
Service is now added!

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

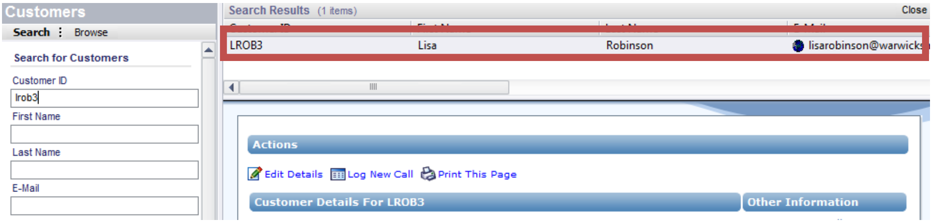
This can now be done through using these options from the Supportworks Today screen



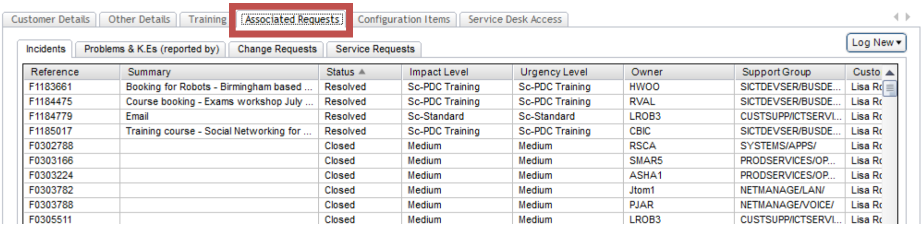
Or

You can search either by Customer Or By Request Reference

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



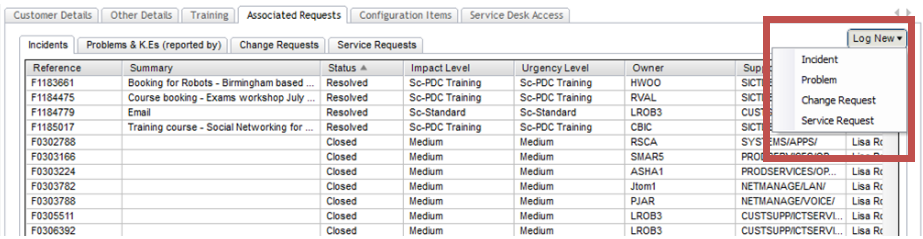
Double click on the results for the Customer (highlighted in Red)



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



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.

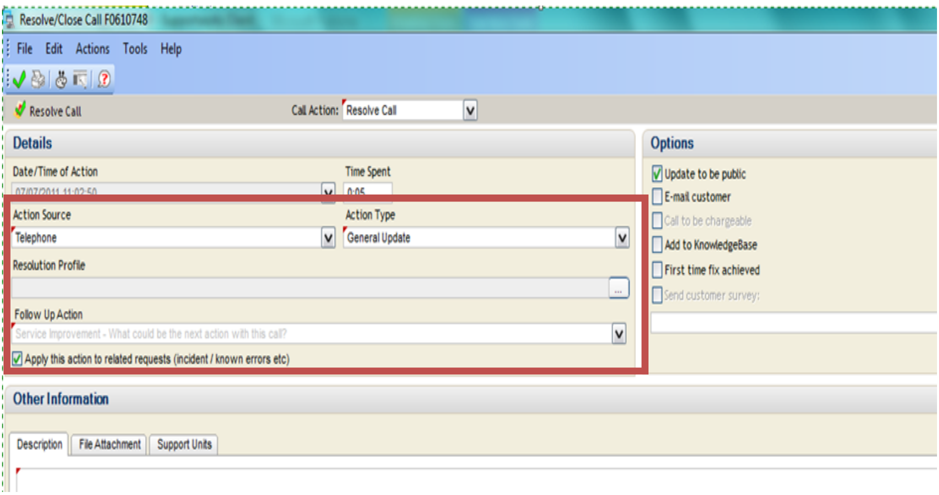
Accepting calls

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

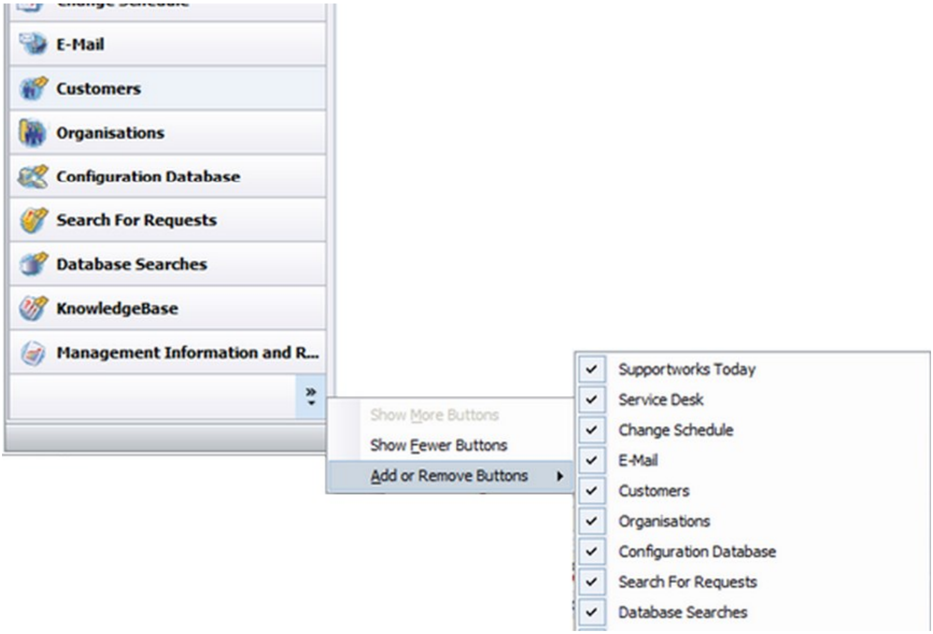
If you cannot resolve a call and it needs to be passed to another team—only assign to Team Level (not individuals) unless prior agreement has been made.
This prevents calls from being left unmonitored.

Resolving calls



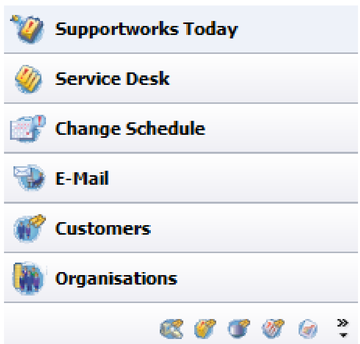
The following fields must be completed on Resolution of calls
Full details of Resolution needs to be entered into the Description tab before saving. Remember the customer will receive an e-mail containing this text so it needs to make sense.
Calls will be closed automatically 5 days after initial Resolution.

Hints and Tips



- Want to customise your Navigation tabs?

Click on 



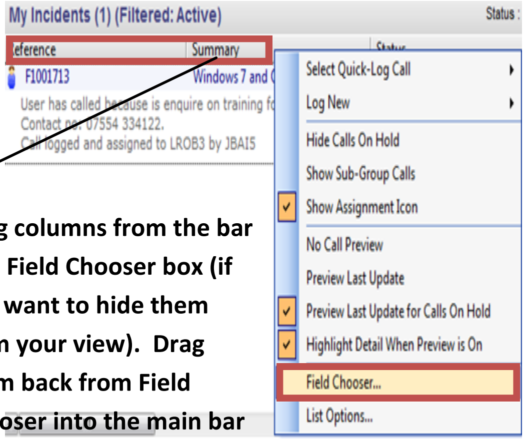
You can then either select - Show Fewer Buttons (to display the tabs as icons in the bottom row)

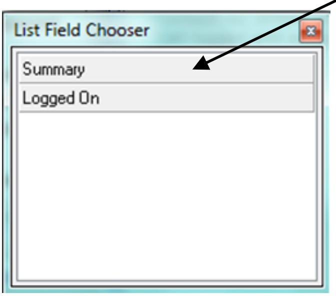
To put these back as tabs then use the Show More Buttons option.

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)

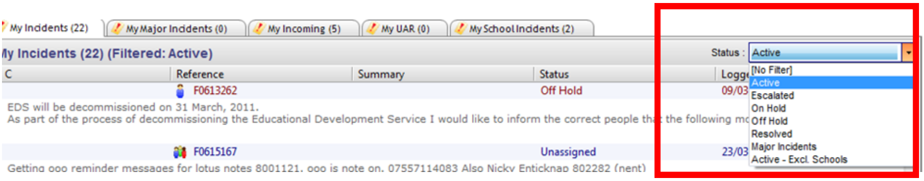
Right click on column names and select Field chooser.





Drag columns from the bar into Field Chooser box (if you want to hide them from your view). Drag them back from Field Chooser into the main bar in any order you wish.

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



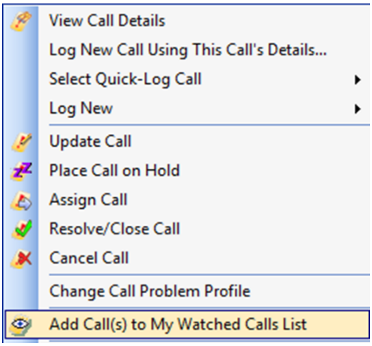
- Where appropriate calls can be put on hold (e.g. customer is away from the office for an extended period) this stops the clock and helps meet SLA's. Right click call and select Place Call on Hold.
  Enter a date and time to restart the clock (usually when customer is back) and a reason for putting 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;

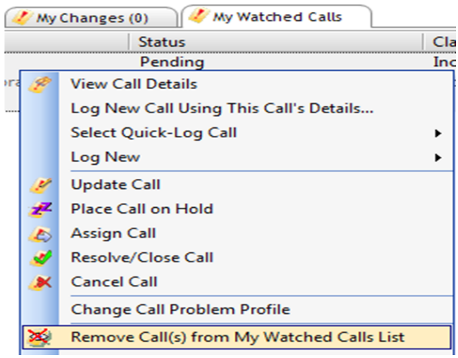
To Add to list

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
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if you have a problem to report,
call on **01926 41 41 41**

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