



# LANDESK Service Desk

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## Self Service User Guide

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Document number LDS\006 Issue 2.1

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# About this manual

## Documentation

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

There are three main manuals about LANDESK Web Access, which are meant for different audiences:

**LANDESK Web Access Administrator Guide** – intended for Service Desk administrators and designers, this manual describes how to design and configure both Web Desk and Self Service.

**LANDESK Web Desk User Guide** – intended for analysts, this manual describes how to use Web Desk to log and progress processes.

**LANDESK Self Service User Guide** – intended for end-users, this manual describes how end-users can use Self Service to log and track processes, and resolve their own tickets.

## Configuration

LANDESK Service Desk 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. Any examples given are only representative of configured systems – your own requirements may differ widely.

## Conventions

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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 italicized, 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 recognize the part of Service Desk you are using. Because your system has been set up specifically for your organization, the screen details you see may differ, particularly in the examples shown.



# LANDESK Self Service

LANDESK Self Service is an application for end-users that provides access to the Service Desk database through a web browser. For an up-to-date list of supported web browsers and browser versions, see the *LANDESK Service Desk Supported Platforms and Feature Compatibility* documentation.

This section gives an overview of Self Service and its user interface, and also describes how to start and log in to the application.

You can find out about:

- *Web Access, Web Desk, and Self Service* on page 8
- *Logging in* on page 8
- *The Self Service navigation bar* on page 9
- *The document area* on page 10
- *Keyboard access* on page 11

## Web Access, Web Desk, and Self Service

LANDESK Web Access is the web-based delivery platform for LANDESK Service Desk. Three applications are delivered using Web Access: LANDESK Web Desk, LANDESK Self Service, and LANDESK Service Catalog.



- LANDESK Web Desk is the analyst-focused web application that enables Service Desk analysts to access the day-to-day features of Service Desk that they need through a web browser. It is also available on certain mobile devices.
- LANDESK Self Service is an end-user application that enables end-users to search the knowledge base, view the status of their incidents, and raise new incidents as required.
- LANDESK Service Catalog enables end-users to view and request services that have been made available to their groups or roles. You can access Service Catalog from either Web Desk or Self Service.

**NOTE:** Analysts can access all of these Web Access products; end-users, however, can access only Self Service and Service Catalog.

LANDESK Self Service and LANDESK Web Desk use the same design and administration components in the Service Desk console.

**NOTE:** For more information about LANDESK Service Catalog, see the separate *LANDESK Service Catalog User Guide*.

For more information about configuring LANDESK Web Access, see the separate *LANDESK Web Access Administrator Guide*.

For more information about LANDESK Web Desk, see the separate *LANDESK Web Desk User Guide*.

For more information about using LANDESK Web Desk on a mobile device, see the separate *LANDESK Mobile Web Desk User Guide*.

**NOTE:** All of the administration features, and the majority of the design features for all of these Web Access applications are accessed from the Service Desk console.

## Logging in

Before you can use Self Service, you need to log in using the Self Service login page.

### To start Self Service:

1. Start a suitable web browser, and open:
  - http://<server>/<ServiceDesk.WebAccess>/ss/home/index.rails**
  - Where <server> is the computer or web site name where Web Access has been installed, and <ServiceDesk.WebAccess> is the name of the Web Access web application that was set during installation.

**NOTE:** If the web server is configured to use SSL, type  
**https://<server>/<ServiceDesk.WebAccess>/ss/home/index.rails**





User name:

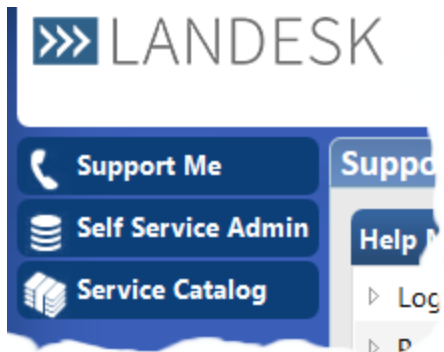
Password:

**NOTE:** If your system is set up to use Integrated Login, you are logged in automatically using your network login.

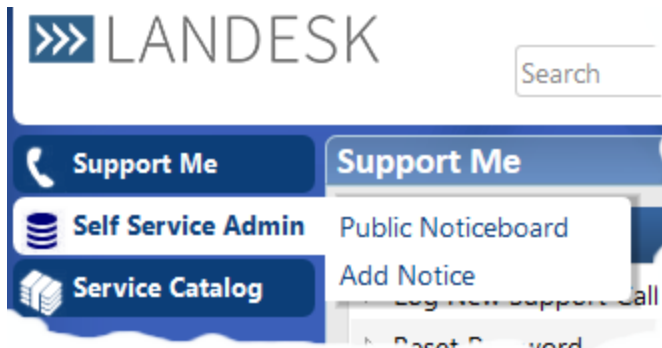
2. Type your **User name** and **Password**, then click **Log on**.  
Self Service starts, displaying your Self Service home page.

## The Self Service navigation bar

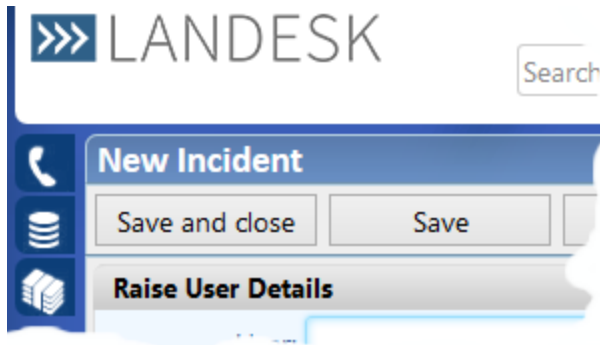
The navigation bar on the left of Self Service provides access to the different areas of Self Service that you have access to.



The shortcuts in each shortcut group appear when you hold the mouse over a group. The shortcut groups themselves can also be associated with a link.



When you click a link that displays a document (such as a New Incident window), the navigation bar becomes narrower, displaying only the group icons, to provide more space for the window you are using.



## The document area

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The document area of Self Service is the main area to the right of the shortcut bar beneath the toolbar.

You use this area to:

- Work with queries, to find data from the system (see *Finding information using queries* on page 13)
- Add information to processes (such as incidents) that you are working on (see *Logging and progressing processes* on page 23)
- Access search results

## Setting the time zone and changing password

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As Self Service is a web application that can be accessed from anywhere, it is important that you set your current time zone. You do this from the My preferences page.

### To set your current time zone:

1. On the toolbar, click ☰.  
The My preferences page appears.
2. In the **Time zone** list, select your current time zone, then click **Save**.

You can also change the password you use to login to Self Service from the My preferences page.

### To change your Self Service password:

1. On the My preferences page, click **Change Service Desk password**.  
The Change Service Desk password dialog appears.
2. Complete the dialog and click **OK**.  
Your password is changed.

## Keyboard access

In LANDESK Self Service, 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.

<b>Keystroke</b>	<b>Description</b>
ENTER	If you are viewing Query Results anywhere within the application, pressing ENTER opens the selected item. In a text entry field, pressing ENTER starts a new line. If a button has focus, pressing ENTER performs the button's function. In the Actions panel, pressing ENTER displays the appropriate window. If a drop-down list is expanded, pressing ENTER selects the highlighted item. Elsewhere, pressing ENTER will save and close the window.
Spacebar	If you are viewing Query Results anywhere within the application, pressing the Spacebar opens the selected item. If the shortcut bar has focus, pressing the Spacebar opens the selected shortcut.
Arrow Keys	If a drop-down list has focus, displays the contents of the drop-down and enables you to move around the drop-down. If the window that you are working on has collection tabs, once you are on the tabs, you can use the arrow keys to navigate between the tabs.
HOME	Displays the first page of a paged list.
END	Displays the final page of a paged list.
PAGE UP	Displays the previous page of a paged list.
PAGE DOWN	Displays the following page of a paged list.
ESCAPE	Cancels the current page.
CTRL+Up or Down arrow	In the shortcut bar, displays the previous or next shortcut groups.
TAB	Once you have focus on a collection tab, you can use the TAB key to change focus to the items within the tab.
F8	On a drop-down list, pressing F8 displays the values for the list.
CTRL+ALT+B	If you are viewing a process form, changes the focus to the Actions panel.
CTRL+ALT+G	If you are viewing a process form, changes the focus to the Collections tabs.
CTRL+ALT+H	Displays the Home page.
CTRL+ALT+D	Changes the focus to the document area.
CTRL+ALT+L	Changes the focus to the results list.
CTRL+ALT+W	Changes the focus to the shortcut bar.
CTRL+ALT+F	Changes the focus to the Search box.
CTRL+G	In a drop down list, changes focus to the Go To Page control.
CTRL+P	Displays the print dialog box.



# Finding information using queries

This section describes how to use queries to access records and display information from your LANDESK Service Desk database. You can find out about:

- *The query results page* on page 14
- *Paging through the results list* on page 15
- *Sorting the results list* on page 15
- *Exporting query results* on page 15
- *Progressing processes from a query results list* on page 16
- *Dashboards* on page 16

## The query results page

The query results page enables you to view and fine-tune your results list.

**NOTE:** Each query has a unique URL (web address), which is displayed in the browser's address bar. You can use this link on web pages, and in e-mails and documents to link directly to the query.

The screenshot shows a web interface for an 'Incident List' query. At the top, there is a blue header bar with the title 'Incident List' and a dropdown arrow. Below the header is a filter section with a label 'Status equals:' followed by an empty input field. The main area contains a table with the following columns: Reference Number, Creation Date, User, Status, Summary, and Description. The table lists several incidents, including one with Reference Number 1000000 and another with Reference Number 1000007. At the bottom of the table, there is a pagination control showing '1 of 1' and a 'Count: 33' indicator.

Reference Number	Creation Date	User	Status	Summary	Description
1000000	19/04/2011 08:38:17	Max Lewis	Closed	How do I create a table in Word?	
1000001	19/04/2011 08:48:16	Max Lewis	Closed	Email Issue	
1000002	19/04/2011 08:54:41	Max Lewis	Closed	Unable to access Webprocurement	
1000003	19/04/2011 08:56:37	Max Lewis	Closed	Laptop is very noisy	
1000004	19/04/2011 09:00:02	Max Lewis	Closed	Change Toner	Request to change toner. Printer:
1000005	19/04/2011 09:02:28	Ben Palmer	Closed	Marketmaker running slowly	
1000006	19/04/2011 09:03:32	Helen May	Closed	Internet access issue	
1000007	19/04/2011 09:04:55	Gareth Davies	Closed	Question re MS Word	How do I create a table?
1000008	20/04/2011	Max Lewis	Closed	Email Issue	Issue with email. Details:

- 1 – query title
- 2 – query filter
- 3 – results data
- 4 – column headings

You can use either the mouse or the keyboard to work with your query results list. Both options are described in the following sections.

**NOTE:** If a query has a color attribute added to it, the color for the record is displayed as a disc in the color column of the results list.

**NOTE:** The results list may have been configured in a report format that enables you to display more information when you click ▼ in the required row. You can also use the left and right arrow keys to expand and close the additional information.

**NOTE:** If a query has been configured as a chart, clicking a segment of a pie chart or a column on a bar chart displays a list that corresponds to the selected group.

## Selecting and opening items from the results page

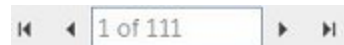
Some query results lists allow you to open the underlying items from the results list.





To move the keyboard focus to the results list, type **CTRL+ALT+D**; you can then use the arrow keys to move up and down the list. To open a selected item in the list using the keyboard, press **ENTER**.

To open an item from the results list using the mouse, click the required row. To select a row without opening the corresponding item, hold the mouse over the row for a moment. The row is initially highlighted using a lighter color before being selected.

## Paging through the results list

Sometimes your results list will fill more than a single results page. You display the different results pages using the page control at the bottom of the results list.



-  (or press **Home**) – displays the first page of the results
-  (or press **Page Up**) – displays the previous page
-  (or press **Page Down**) – displays the next page
-  (or press **End**) – displays the final page of the results

You can also type the page you want to display into the text box in the middle of the page control, then press **ENTER**.


## Sorting the results list

The sort order for a set of query results is indicated graphically in the column headers. A small arrow next to the column heading indicates the sort direction as well as which column is being sorted on.

You can change the sort attribute by clicking the column that you want to sort on. If you click a column that is already sorted, the direction of sorting is switched.

**NOTE:** Alternatively, right-click the column header for the attribute, then click **Sort ascending** or **Sort descending**.

You can sort by more than one attribute by holding **SHIFT** while selecting the column headers. In this instance, the results are sorted by the column you first select, and then by the subsequently selected columns.

To specify the sort order using the keyboard, press the Up Arrow until the header row has focus, then use the Left and Right Arrows to change to the required column. When you have selected the required column, press **ENTER** to toggle the sorting for that column, or press the Application key () to display the context menu.

## Exporting query results

You can export a query results list to a character separated values (.CSV) file by right-clicking the column header of the query results list, then clicking **Export to .csv**.

The query results are downloaded as a .CSV file when you click **Export to .csv**. Depending on the browser you are using, and how your browser is configured, you might be asked whether you want to save or open the file. .CSV files are typically opened in spreadsheet applications, such as Microsoft Excel.

## Progressing processes from a query results list

You can perform process actions on a single entry in a query results list by right-clicking the appropriate row in the list then selecting the required action. Only actions that are available at the process's current status are available. If a window is associated with the action, then that window appears.

**NOTE:** For more information about progressing processes, see *Logging and progressing processes* on page 23 the *LANDESK Web Desk User Guide*.

## Dashboards

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Query results can also be displayed on dashboards, which are used to present to users information that is routinely required. Dashboards can also include links to create new incidents, links to useful web pages, charts that show the current status, and so on.

### Personalizing dashboards

If you have the **Configuration\Designers\Personalize Dashboard** privilege set for your Service Desk role, you can change the width of the columns on a dashboard, drag the different gadgets to new locations on the dashboard, and collapse and expand gadgets.



# Schedule Management

Certain CIs and analysts may have calendars associated with them so that you can see their availability and potentially book appointments for them. These calendars may also appear on a dashboard, depending on how your system has been designed.

**NOTE:** Appointment calendars are not available in BridgeIT.

In this section, you can find out about:

- *Adding appointments* on page 18
- *Adding appointments using a process action* on page 20

## Adding appointments

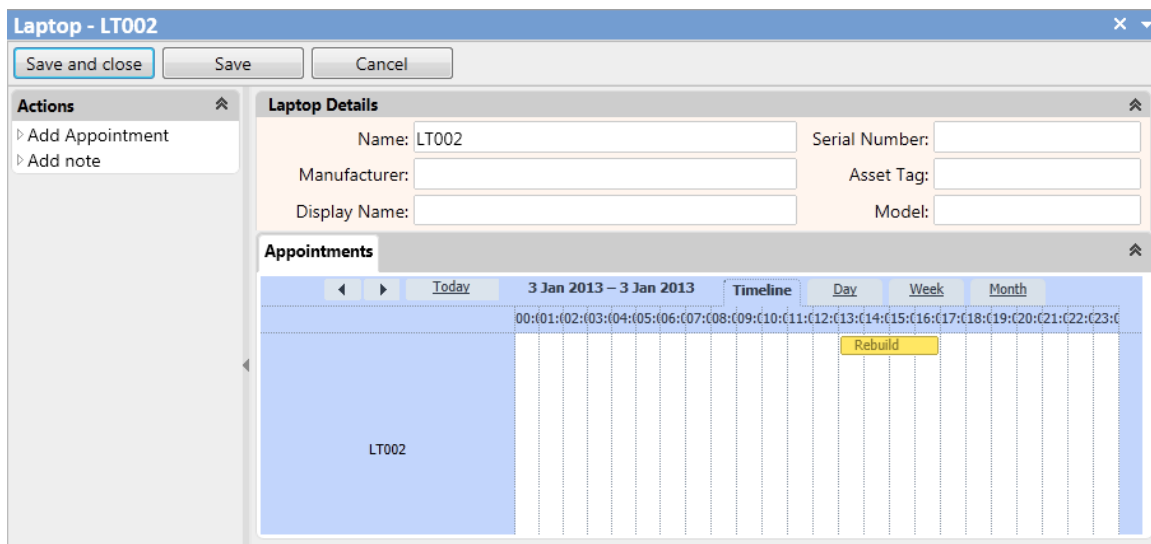
If an object is schedulable, you can add appointments to the object.



### To add an appointment to an object:

1. In Web Access or Mobile Web Desk, open the window for the object that you want to add an appointment to.  
For example, this could be from a query results list, or from an Add Configuration Item entry in the History panel for a process.
2. With the window for the schedulable object displayed, click **Add Appointment** in the **Actions** list. The New Appointment window appears.

**NOTE:** Alternatively, double-click the calendar control at the bottom of the window.

3. Complete the **Start Datetime**, **End Datetime**, and **Title** fields, then click **Save and close**. The appointment is added to the calendar on the Appointments tab for the object.



Links across the top of the calendar control enable you to switch the calendar between **Timeline**, **Day**, **Week**, and **Month**. Click   to move backwards and forwards through the calendar, and click **Today** to return the calendar view to today.

**NOTE:** You can edit existing appointments by double-clicking their entries in the calendar control.

**NOTE:** In Mobile Web Desk, you can access the **Day** view of the calendar control from the **Appointments** collection under the **Collections** button. You can move between different days using the arrow buttons at the top of the calendar, and can open existing appointments by tapping them.

## Adding recipients

Schedulable objects have a **Recipients** collection on their **Appointment** object. For example, if you add the **Schedulable** behavior to the **Laptop** object, then a **Laptop Appointment** object is created, which includes a **Recipients** collection. This enables you to send invitations to people for schedule management appointments.

**NOTE:** You need to run the **Mail Manager – Outbound Service** in Configuration Center for Service Desk to send the e-mail invitations.

**To add recipients to schedule management appointments:**

1. In Web Desk, double-click an appointment on a calendar (either on an object's window, or on a Calendar gadget).  
The Appointment window appears.
2. In the **Actions** list, click **Add Recipients**.  
The New Recipient window appears.

**New Recipient**

**Add Recipient** ⤴

Recipient Type:

**Notification Recipients** ⤴

Recipient Type	Description

3. In the **Recipient Type** list, select **User**, **Group**, **Role**, or **Other E-mail address**, then in the next list select the required value or, for **Other E-mail address**, type the e-mail address.
4. Click **Add**.  
The recipient is added to the Notification Recipients list.
5. Add other recipients as required, then click **OK**.  
Now when an appointment is created, updated, or canceled, the recipients are sent the appropriate appointment updates.

**Recurring appointments**

After you have set up an appointment, you can choose to set it to recur.

**To configure a recurring appointment:**

1. In a calendar control, double-click the appointment that you want to configure to recur.  
The Appointment window appears.

- In the **Actions** list, click **Configure Recurrence Options**.  
The New Recurrence dialog appears.

**New Recurrence**

Save and close Save Cancel

**Recurrence Frequency**

Daily:  Every 1 day(s)  
 Every weekday

Weekly:  Recur on Sunday of every 1 week(s)

Monthly:  Recur on the First of every 1 month(s)  
 Recur on the First Sunday of every 1 month(s)

**Recurrence Range**

Start date: 11 January 2013

Stop recurring after:  No end date  
 End after: 10 occurrences  
 End by: 12 January 2013

- In the **Recurrence Frequency** group, set how often you want the appointment to recur.
- In the **Recurrence Range** group, set when you want the recurrence to end.
- Click **Save and close**.  
The recurring appointments are added to the calendar.

**NOTE:** If you set up an appointment to recur on the 29th, 30th, or 31st of a month, and the **Recurrence Range** includes months that do not have these days, then the appointments will occur on the last day of those months.

## Adding appointments using a process action

You can add appointments to certain objects as part of a process using Self Service. When you add an appointment as part of a process, the appointment is added to all of the schedulable objects associated with the process. You can then edit or delete these appointments individually.

**NOTE:** The example in the procedure below assumes that the **CI** and **Analyst** objects have been made schedulable, and that an action on a **Change** process called **Schedule** has been created to display the calendar.

**To add appointments using a process action:**

1. Progress the process to the status where the **Schedule** action is available.
2. Click **Schedule** in the **Actions** list.  
The calendar control appears, with a row displayed for each schedulable object associated with the process. For example: there is a separate row for the Raise User, the current assigned user, and a row for each CI that has been added to the process.

**NOTE:** The Create and Update users do not appear in the calendar unless they are otherwise associated with the process. (For example, if the Create User is also the Current Assigned Analyst, then they will still appear on the calendar.)

3. Double-click the calendar control.  
The Appointment window for the object appears.
4. Complete the Appointment window as required, then click **OK**.  
The appointment is added to every schedulable object associated with the process, and appears on every row of the calendar control.

**NOTE:** Double-clicking an appointment on the calendar displays the Appointment window for that appointment. If the selected appointment is associated with the current process, you can edit or delete the appointment; if the selected appointment is *not* associated with the current process, you can only view it. After adding the appointments, you can edit or delete them individually.

5. Click **Save and close**.  
The Schedule action completes, the appointments are saved, and the process window reappears.



# Logging and progressing processes

This section describes how to log and progress processes (such as incidents and changes) using Self Service. You can find out about:

- *Logging a process* on page 24
- *Completing windows* on page 24
- *Progressing processes* on page 26
- *Typical process components* on page 27
- *Searching for answers in Self Service* on page 28
- *Resolving and closing processes* on page 28

## Logging a process

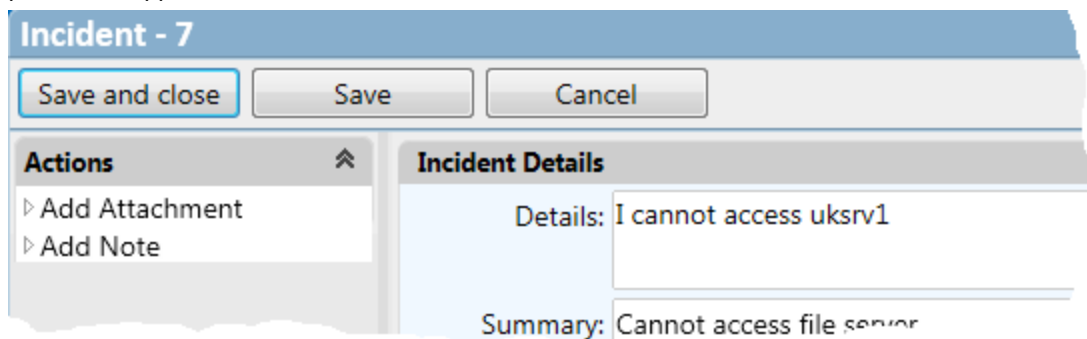
You log processes (for example, incidents, problems, or changes) in Self Service by clicking the appropriate link in the Shortcut bar. The process links that are available to you have either been published to you using LANDESK Service Desk console (see the *LANDESK Service Desk Administrator Guide*), or have been added directly to your Self Service Shortcut bar.

### To log a new process:

1. In the Shortcut bar, click the required shortcut.  
The process window appears in the document area.

**NOTE:** Each process has a configurable Details window that you use to capture the initial information about the incident. The Details window that you see could be different from that seen by other users, depending on their role, for example.

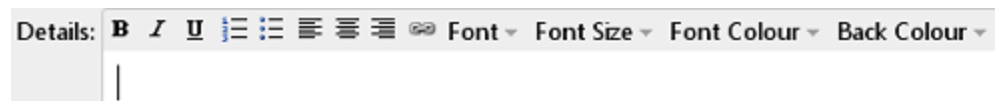
2. Complete the Details window as required, then click **Save**.  
The process is saved and the Actions panel appears. If you are logged in as an analyst, the History panel also appears.




## Completing windows

Most of the controls on windows in Self Service behave like standard controls. More information, however, is provided below about some of the controls:

**Formatting toolbar** – some text boxes may have been configured to display HTML formatted text. These fields will include a toolbar that enables you to format the text in the box, and also to add a hyperlink.



To add a hyperlink, select the text that you want to use as the link, then click .

Depending on the browser you are using, you can include images in HTML fields by:


- dragging the image file from Windows Explorer to the required position (Internet Explorer, Chrome, Firefox)
- copying the image to the clipboard from an image editor, then pasting it into the HTML field using either the right-click menu or by using CTRL C followed by CTRL V (Chrome, Firefox)

You can resize images if you use the Firefox browser.


**Text boxes** – empty multi-line text boxes appear on screen with a small number of lines available, but grow as text is entered and further lines are required.




**Related fields** – when you complete certain fields on a window (for example, the **Full Name** field often used on the Incident window), other fields that provide further information about the selected item are automatically completed, such as **Phone** and **Email Address** (depending on your implementation).

**List boxes** – click  on a list box to display its contents. If the list contains more than 50 entries, a page control appears at the bottom of the list to enable you to move between the different pages of values.



If you type into a list box, the drop-down list appears showing the values that contain the text you've typed.

**Categories** – the values in some list boxes are organized hierarchically (the most typical example is Category). For these list boxes, you can expand and contract the tree within the list box by clicking  next to the required branch, or pressing the Right arrow key.

When you select a sub-category, the completed list shows the full path to the sub-category, with the different category levels separated by hyphens.

**Date fields** – most date fields in Self Service are read-only and completed automatically by the system (showing creation and update dates, for example). However, there are times when you can complete a date field yourself. In these instances, when you click  next to the date control, a standard date picker appears.



**Group boxes** – you can show and hide the contents of group boxes on a window by clicking  and  on the group box's title bar.

## Progressing processes

When a process is logged and saved, 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. The actions that are available to you also depend on your privileges. You can see which actions are available on the Actions list.



The Actions list has a separator: actions above the separator move the process on to a new status, towards completion; actions below the line are called *optional actions*, and are used to add information to the process. Most actions have a window associated with them, but others do not (for example the actions that start and stop the clock for service level management typically don't). You complete the required investigations and complete the information on the relevant window.

Typically, you cannot resolve a process until all of the tasks have been completed.

## Typical process components

Each process can have many different components, depending on the exact requirements of the process and your organization. Some of the more common components are described below. Your processes may use some or all of these. The actions to add these components might not be available at all statuses in the process, and the required privileges might not be available to all analysts.

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

**Attachments** – 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 tab on the Process window. You can attach any number of files to a single process.

**NOTE:** You must have the relevant application to view attached files. For files larger than 1 or 2 MB, we recommend that you store the file on a specified directory and put the path to this directory in the attachment name. The maximum file size for an attachment is 4 MB.

**NOTE:** When you download files with names containing multi-byte characters (such as Japanese or Chinese letters) on Windows Phone, iOS, and certain desktop browsers, the file names are corrupted. We recommend avoiding file names containing multi-byte characters when using Web Access.

**Tasks** – If a process incorporates a number of activities, the process can be subdivided using one or more tasks. Tasks contain actions that must be resolved before you can close the process - processes are usually designed so that they can't be resolved until all of the tasks are complete. Tasks 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.

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.

**Reminders** – As a process progresses, there are often times when you or another analyst needs to be reminded of something, such as calling a user, looking at a task at a particular time, or attending a meeting. Using reminders, you can send a message to yourself or to 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 LANDESK Service Desk's own Service Level management system.


**NOTE:** For more information about service level management in LANDESK Service Desk, see the *LANDESK Service Desk Administrator Guide* and the *LANDESK Web Desk User Guide*.

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.

You can send a notification message to the following people to ensure that they are aware of who the Process is assigned to, by selecting the appropriate check box:

- The analyst who is responsible for the Process (the Assignee)
- The person who logged the Process (the Originator)
- The user associated with the Process


## Viewing a printable report of a process

Self Service may have been set up to enable you to view a printable report of the incident or other process that you are viewing. If it has, then when you display the main window for the process, the  icon appears at the top of the process window, which you can click to display the appropriate report.

## Searching for answers in Self Service

LANDESK Self Service includes a mechanism for searching for knowledge articles.

### To search for information:

1. In the **Search** box, type the words that you want to search for, then click .  
The search results appear.
2. To see the complete record for a result in the list, click it.  
The parent object for the result appears. (For example, if you click an entry for an Incident Closure, the Incident window appears.)

**NOTE:** You can use the boolean operators **AND**, **OR**, and **NOT**, and the wildcard characters **\*** and **?** to search for multiple and single wildcards respectively – although you cannot use **\*** and **?** as the first character in a search string.

You can also use the **~** character followed by a number to specify that the words you are searching for must be near to each other.

For example, "**server reboot**"~2 indicates that the words **server** and **reboot** can be up to two words apart, not counting excluded words.

**WARNING:** There are several reserved, special characters for Knowledge Management:

**+ - && || ! ( ) { } [ ] ^ " ~ \* ? : \**

If you use a special character other than **\***, **?**, or **~** you will receive an error message. To avoid this error message, you can either remove the special character, or ignore it using the **\** character in front of it.

For example, **look!** will give an error, but **look\!** will run.

## Resolving and closing processes

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.

For many service desks, two steps are required to close a process because there may be a procedural requirement for the analyst involved to sign off processes internally before a supervisor completes the formal closure. Other service desks close processes directly without the intermediate resolution stage. Consult your system supervisor for the correct procedure.

**NOTE:** We recommend that you provide as much detail as possible when resolving or closing processes so that this information is available to other analysts when they handle similar issues.

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