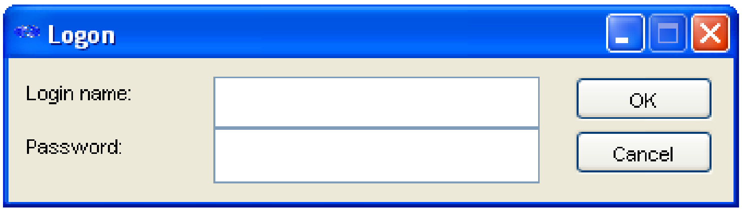
HP Service Desk Quick Guide

By Tracy Deane

How to install and connect to HPSD Prod

Go to \\software\HPServiceDesk\InstallScripts\FullInstall\ and double click **HPSDInstall.exe**
This will install the full HPSD product and Service Packs including Active Directory. It will also create a desktop shortcut for the HPSD client.

Double click the Shortcut to open HPSD. You will be prompted for a logon and password.



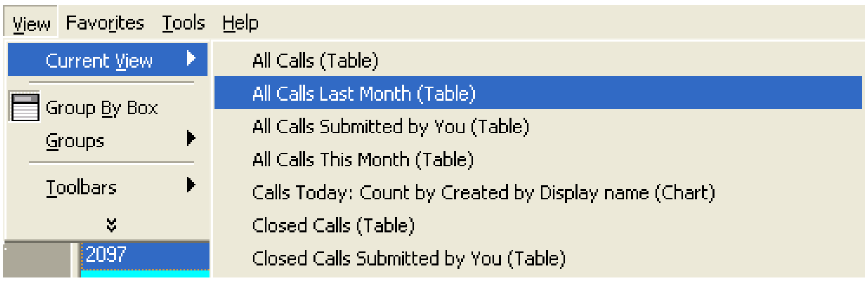
Enter your normal uninet username and password.
This will open the HPSD console.

The first time the console opens, it may take a while to open as it will choose the first “All Calls” view from the list.

Modify existing views using tables and charts.

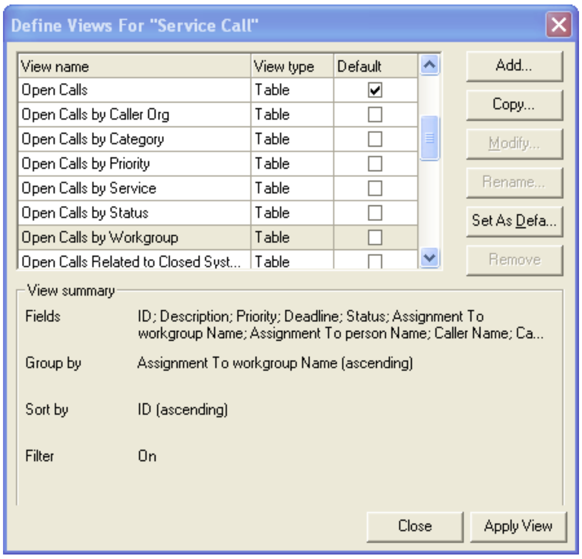
Views are the way the HPSD displays call records.
To change to another existing view either click the drop down box

on the tool bar or click the **view** menu > **current view** and select the view you wish to use.

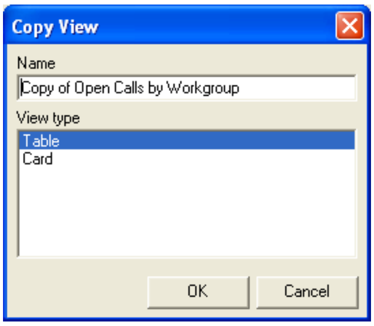


HOW TO Create a view for your workgroups only.

Go to the **view** menu > **current views** > **define views**
Highlight the **Open Calls by Workgroup** and click **copy**

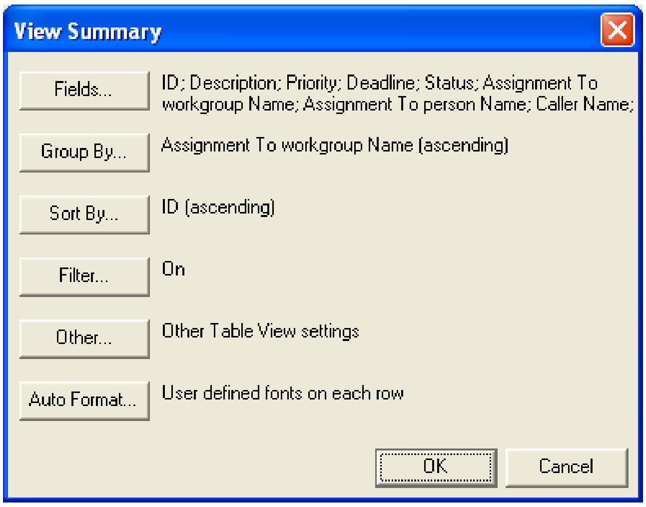


This will prompt you for the format you wish to use

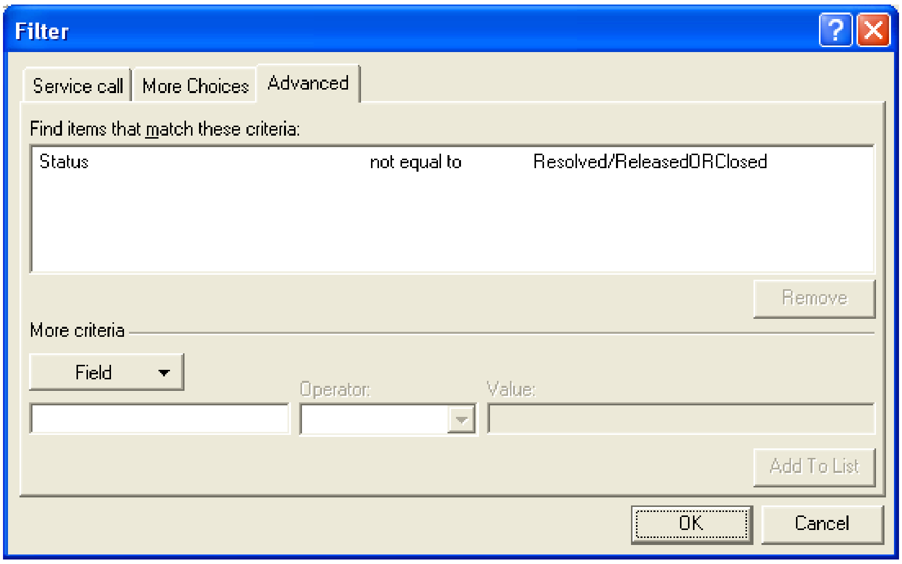


Select **table** and click OK to continue.

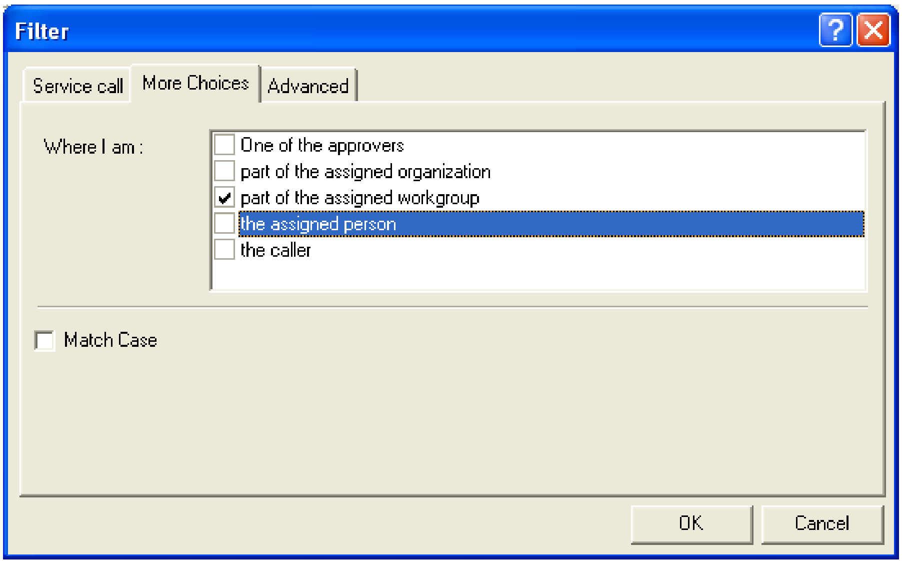
Highlight the **Copy of Open Calls by Workgroup** and click **Modify**



Click the **Filter** button

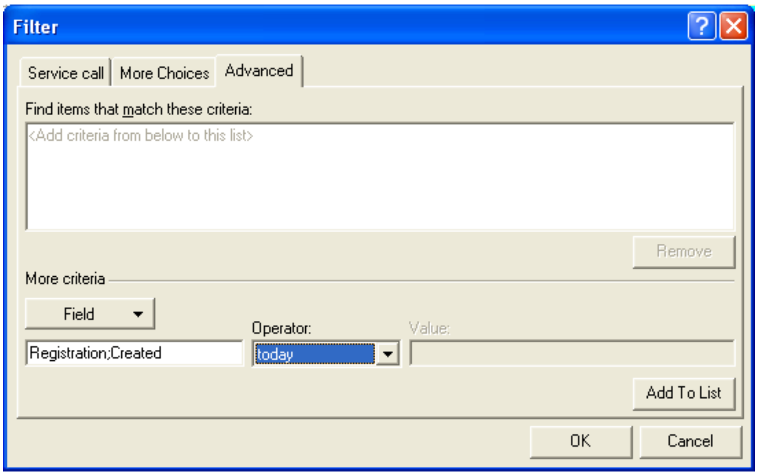


Click the **More Choices** tab and tick **part of the assigned workgroup**



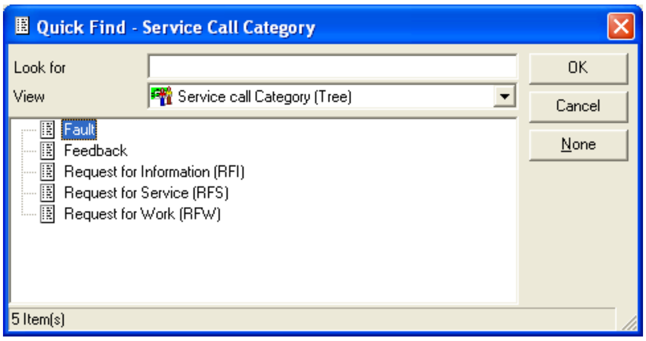
Click **OK**, **OK** and **Rename** to change the name and then click **Apply View** to show the relevant calls.

HPSD views can be modified in many ways using the Advanced Tab but you really need to understand which field is which. For example if you wished to create a view that showed all calls logged today you would copy the All Calls view, Click **modify**, **Filter** and then **Advanced** and then set the field **Registration>Created** to **today** and then click **Add to List.**



There are many other fields and filters that you can set depending on the results you want. It will take time to get used to the field names, but if you require assistance you should contact the IT Help Desk as they will be able to provide more details on the correct field or settings you should use.

Understanding the HPSD Categories for a new call

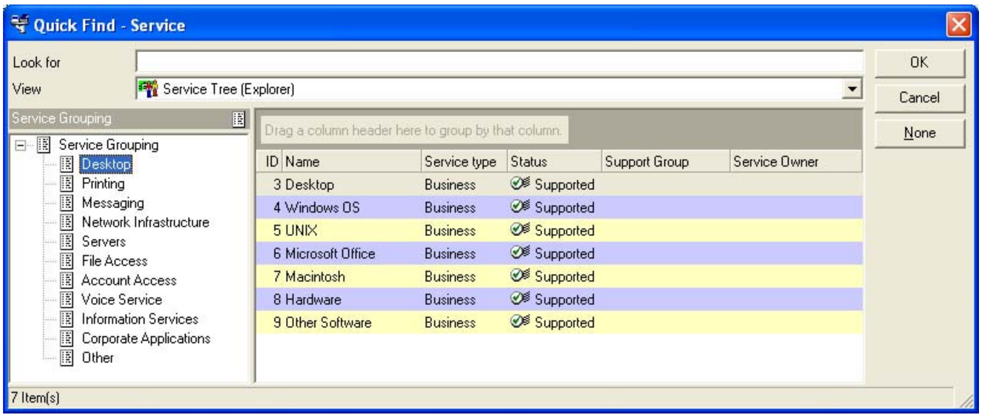


The five standard categories are as per the above image.

CATEGORY	WHEN USED
Fault	For any call reporting something which is not working as required
Request For Service (RFS)	For any request for a service provided by or thru ISTS – can include Training and Documentation requests
Request for Information (RFI)	For any request for information or “How to” queries
Request For Work (RFW)	For any requests that would previously have been raised via the RFW system.
Feedback	For any general client feedback (i.e. not related to a specific call) including Customer Complaints

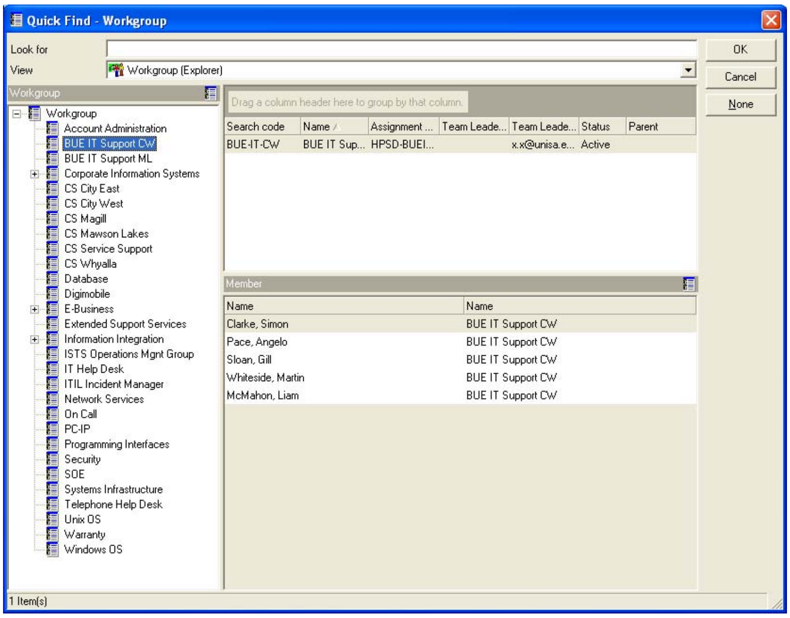
Understanding Service Types, Workgroups, Classifications and Closure Codes

Service Types



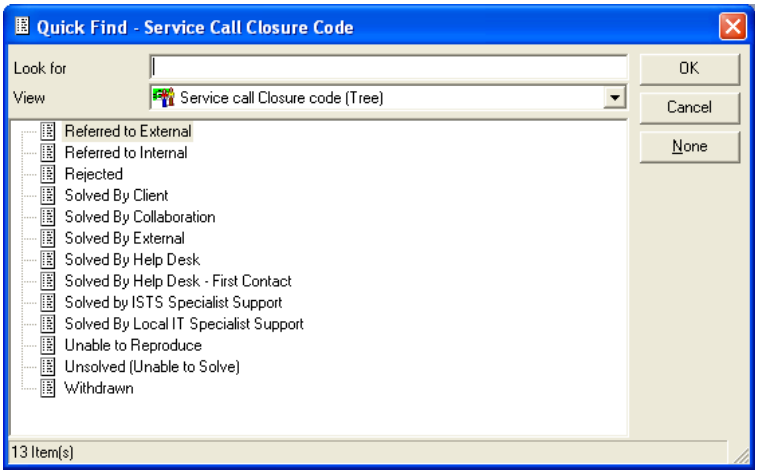
All Services are grouped under 11 major headings on the left side of the screen. You will only be able to use the right hand column as valid services. You can either type some of the first few letters or simply type the correct number associated (if you know them) and the field will automatically populate.

Workgroups



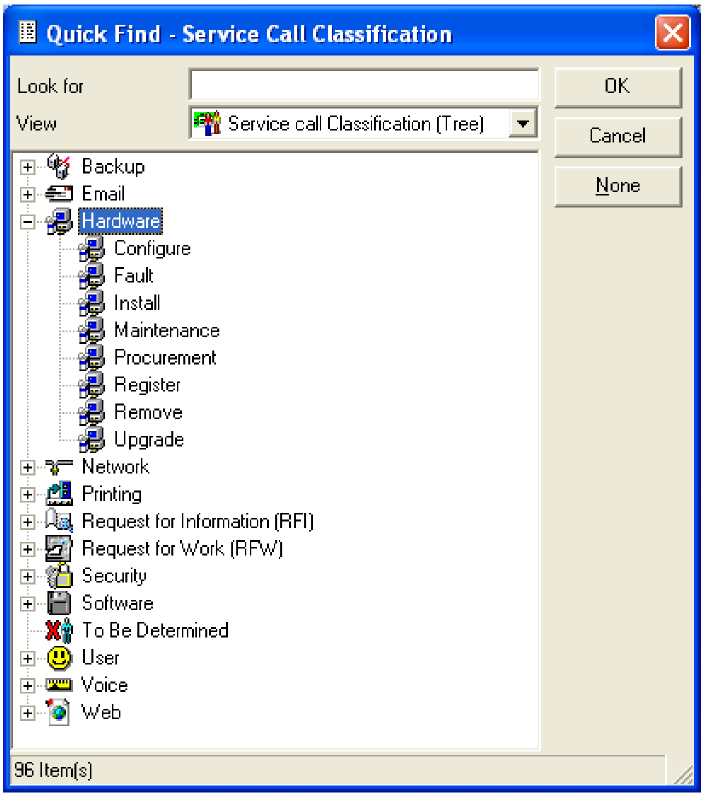
It may take some time to get used to the Workgroups that are available to assign tasks to. If you know the person you wish to assign you can enter their name into the call and then hit enter to open their available workgroups. Make sure that you removed the users name as all call must only be assigned to workgroups.

Closure Codes



Closure codes relate to how the call was solved. In most cases ISTS staff would use "Solved by ISTS Specialist Support" option and devolved IT support would use "Solved by Local IT Specialist Support".

Classifications

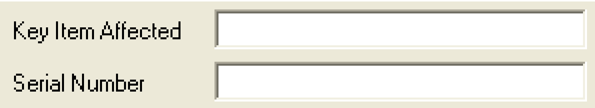


Classification codes describe the job solution. This means that in the case of a hardware problem you can select one of eight different scenarios that describe what action has been taken to resolve the hardware call.

Completing a Service Call from open to close

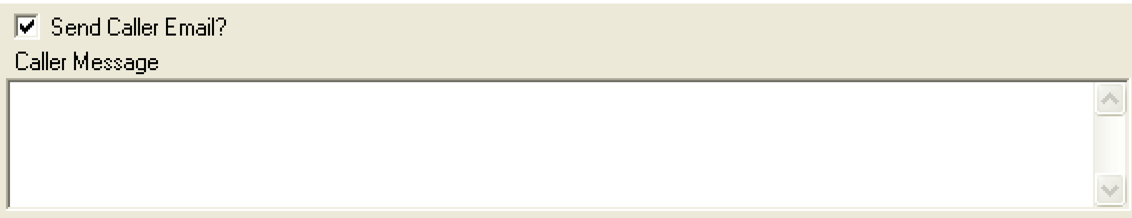
Details are provided in the HPSD Work Instructions booklet.

Understand CMDB and fields relating to it (Blue Plate/Serial Number).



These two fields in the bottom left hand corner of a new service call will eventually be automatically populated from the CMDB (Configuration Management Data Base). Until that time you can still use these fields to enter the Blue Plate or Printer queue name etc and/or the Serial Number if required.

Emailing updates to clients and the Status fields that allow it



Under the close tab there is a Send Caller Email dialog box. You can use this field to send the user a simple text message of less then 255 characters.

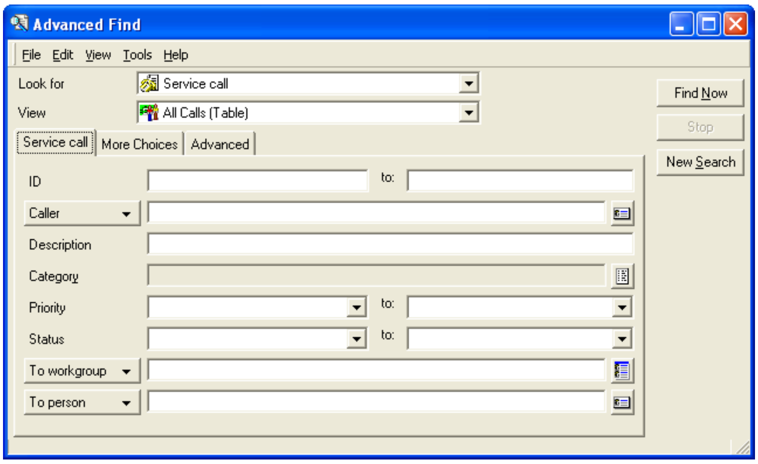
A message will be sent when the “Send Caller Email” box is checked and the status field is changed to:

Waiting External ; Waiting Client ; Resolved / Released

If you type a message in the “Caller Message” field and do not change the Status to one of these settings then the “Caller Message’ field will be cleared but no message will be sent. NOTE: You can retrieve your message from the history field and paste it back into the “Caller Message” field if required.

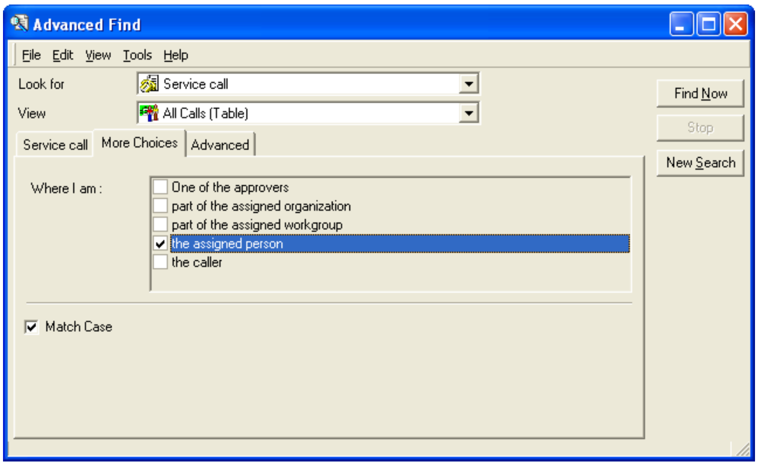
You call also send longer emails or ones with your signature files or from another user by clicking the New Email Message to Caller in the left hand panel. This button will invoke the Outlook client.
Finding existing work orders (for a user or using the HPSD search function).

You can open the **Advanced Find** tool by pressing F2, going to the Tools menu and selecting advanced find or by Clicking  on the tool bar.

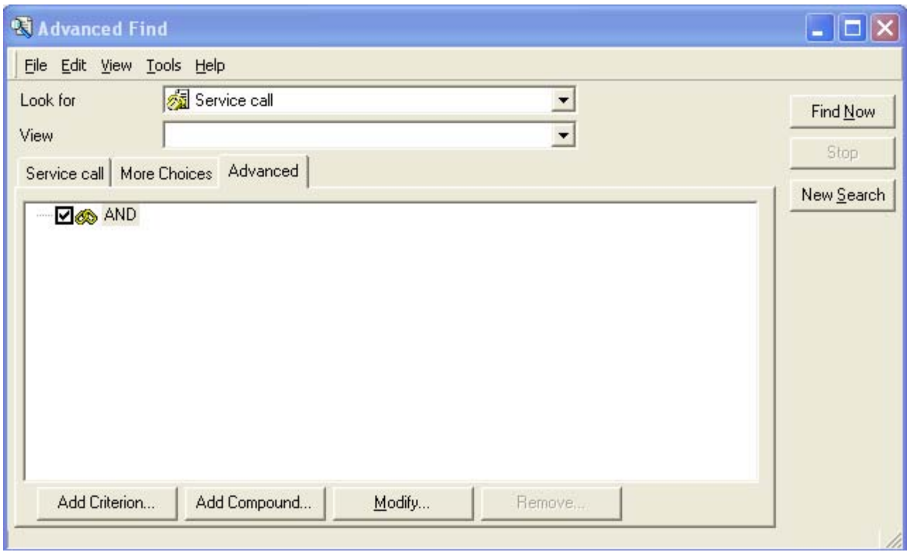


To find a specific Work Request type the call number into the ID field. It will automatically populate the to: field with the same number and click Find Now.

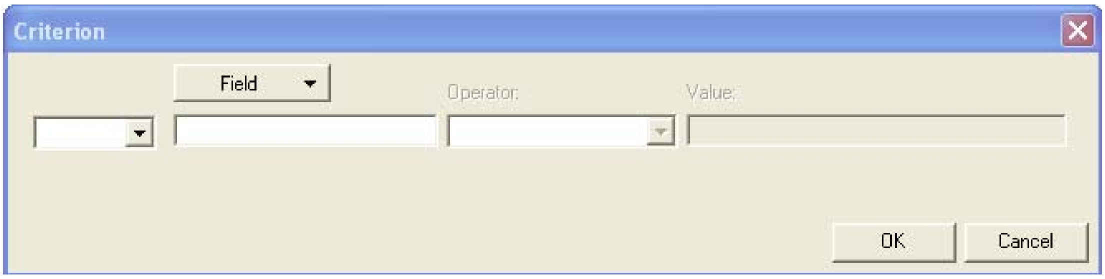
To find calls for a specific user, created on a specific date, by yourself, type the userID in the Caller field, click the more choices tab



Tick the assigned person field, click the advanced tab.



Click **Modify** to change the Compound from And to Or
Click **Add compound** to add another level.
Click **Add Criterion** if you wish to add a specific field to the advanced find.



Click the field button and select Registration > Created from the list, change the operator to “on” and click the drop down list from the value field and select the date from the calendar. Click OK to return to the Advanced Find window and then click **Find now** to show all the calls.

Clicking **New Search** will clear all your selections.

As you understand more of the fields to use you will be able to use more and more sophistication in your searches.

Automatic Call Logging

The Help Desk system is set up to automatically log calls to specific email addresses, for example all requests to PC-IP get logged to the workgroup as soon as the email arrives.

Clearing the HPSD Cache

Go to tools > options and select the advanced tab. Tick the **Purge cache on exit** box and click **Purge Cache Now**. A box will appear to say that some transactions may take a little longer, just click OK to continue. Click OK when completed.