IT Service Manager Tips & Tricks

IT Service Manager Agents,

Since launching in February, more than 10,000 customer service issues have been created and managed in the new IT Service Manager using BMC FootPrints. In this ongoing communication series, NUIT will provide IT Service Manager performance pointers, best practices, and project status updates.

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Tip 1: Browse the Internal Knowledge Base (KB) for IT Service Manager tips

You can access IT Service Manager how-to instructions and general information in the same way you would browse KB articles for other IT services.

1. Log in to the [IT Service Manager](#).
2. Click Knowledge Base.
3. From the Knowledge Base drop-down select FootPrints Internal KB.
4. From the Category drop-down select IT Service Manager.
5. Refine your search using keywords.
   * Use "AND" or "OR" when searching for multiple keywords.

Tip 2: Assign issues you create to another team

All issues created using the web interface or by email are automatically assigned to the creating agent. If creating an issue for another group, change the assignee from you to the appropriate team.

1. Click the Assignees and Notifications tab on the issue.
2. Click your team name in the Assignees box.
3. Select your name and click the left arrow to remove yourself from the issue.
4. Select the appropriate team from the Workspace Members box and click the right arrow to add it to the issue.
   * If you do not know the proper team name, select NUIT-TSS-USSTier1.
5. Check Assignees under Send Email To.
   * Always re-check Send Email To selections after changing issue assignments.
6. Click Save.

Tip 3: Stop email notifications about issues from going to your teammates

All issues received by Tier 1 Support and referred to others are automatically assigned to an entire team. If you are taking ownership, assign yourself to the issue to stop your team from getting emails about an issue you are already addressing.

1. Click the Assignees and Notifications tab on the issue.
2. Select your team in the Assignees box and click on the left arrow to remove it from the issue.
3. Click on your team in the Workspace Members box.
4. Select your name and click the right arrow to add yourself to the issue.
5. Select Assignees under Send Email To.
   * Always reselect Send Email To selections after changing issue assignments.
6. Click Save.

Tip 4: See your entire team's tickets from the IT Service Manager home page

Agents can personalize many IT Service Manager defaults and features, such as making their home page show all issues assigned to their team.

1. Click Preferences in the top right corner of the IT Service Manager.
2. Click the Homepage tab.
3. From the Default List drop-down select your team assignments.
4. On the top left of the page re-enter your password and click Save.

**Tip 5: Use Global Issues only for P1 and P2 level incidents**

Global Issues notify all IT Service Manager users of an issue and activate a pop up alert when any user logs in to the web interface. Please restrict the use of Global Issues to P1 and P2 level incidents.

**Tip 6: Search archived HP Service Manager tickets**

All closed HP Service Manager tickets from the old system are still available in the IT Service Manager.

1. *Click You are in the IT Service Desk workspace* in the top right corner of the page.
2. *Select HP Service Manager Archive.*
3. *Enter terms and values that reference your ticket (e.g. Interaction ID, Incident ID, NetID, Last Name, etc.) in the search box at the top of the page.*

* Please note that ticket attachments were not carried over.

**Tip 7: Create internal Knowledge Base articles**

Agents should use the IT Service Manager KB Style Guide to learn how to properly format KB articles to assure similar appearance, tone, and web accessibility.

1. *From the New Issue drop-down menu select Add to KB.*
2. Make sure that *Internal Knowledge Base* is selected in the Add to drop-down menu.
3. *Enter a Title* for your article.
4. *Select a Service Family* for your article.
5. *Write the Description following the KB Style Guide,* adding images or lists as needed.

**Bonus Tip: Use short URL link to share external Knowledge Base articles**

1. Find the number of the external KB article you want to share.
2. Add that number after the final slash in this URL - https://itsm.northwestern.edu/kb/.
   For example: https://itsm.northwestern.edu/kb/255 will link directly to KB article #255 on how to use the KB.
   * This short URL format cannot be used to link to internal KB articles.

Agents can find more information and training materials on the IT Service Manager web page. Look for more IT Service Manager Tips & Tricks soon!

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