IT Service Manager Agent Guide

Issue Training - Online Tutorials & Guides

http://www.it.northwestern.edu/service-manager/

IT Service Manager Login Page

https://itsm-fp.northwestern.edu/footprints/

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Create a New Issue

Log In to IT Service Manager:

Step 1: Navigate to the IT Service Manager login page
- https://itsm-fp.northwestern.edu/footprints/

Step 2: Log in with your NetID and NetID password
- The IT Service Manager home screen will be displayed.

Create New Issue

Step 3: Click New Issue from the Toolbar

Step 4: Enter Title

Step 5: Select Request Type
- Select the Request Type that most closely matches the Issue.

Step 6: Select Impact and Urgency
- Select the appropriate Impact and Urgency from the respective dropdown menus.

Contact Information Tab (Required)

Step 7: Enter NetID
- Press Enter.
- Verify the Contact Information that populates is correct.

Step 7a: Provide Other Contact Information (Optional)
- Select Yes in the **I am requesting support for someone else?** box.
- If the Service Recipient is different, click the Service Recipient tab, enter the Service Recipient's NetID, and then click Enter.
- Verify the Service Recipient contact information that populates is correct.

Issue Information Tab (Required)

Step 8: Select a Service Family
- Select a Service Family that most closely matches the Issue.

Step 9: Select Service and Category and Sub-Category (if necessary)
- Select the Service and Category and Sub-Category that most closely match the Issue.

Step 10: Enter Description
- Compose a description of the Issue in the Description text field.
  Note: Descriptions entered into tickets are visible to the customer through the self-service portal.

Step 10a: Enter Additional Diagnostic Information (Optional)
- Enter additional information like Location of Machine, Equipment Type, Operating System, Browser, etc. as necessary.

Step 10b: Enter Internal Notes (Optional)
- The internal notes field is only to be used to log detailed technical information about issues for use by other agents.
  Note: The Internal Notes field is not shown to customers.

Attachments Tab

Step 10c: Add Attachments (Optional)

- Click Attach Files.
- Click Browse.
- Select the appropriate file and click Open.
- Click GO to complete the attachment upload.

Assignees and Notifications Tab

Step 11: Select Assignment Group and Assignees

To Assign Issues to a Team (Recommended)

- Click the appropriate Assignment Group.
- Click Assign Team, use the left facing arrow to move the selected team into the Assignees section box.

To Assign Issues to a Team and Agent (Not Recommended)

- Click the appropriate Assignment Group.
- Click Assign Team, use the left facing arrow to move the selected team into the Assignees section box.
- Click the Agent name, use the left facing arrow to move the selected team into the Assignees section box.

To Assign Issues to an Agent (Not Recommended)

- Click the appropriate Assignment Group.
- Click the Agent name, use the left facing arrow to move the selected team into the Assignees section box.

Step 11a: Send Email To: (Optional)

- Use these check boxes to control who sees system generated email notifications from IT Service Manager.
- Select Assignees to have messages sent to Teams and Agents in the Assignees box.
- Select Contact to have messages sent to the people listed on the Contact Information and Service Recipient tabs.
- Add additional email address to the CC: field to add additional people to the system generated email notifications that are sent.

Step 12: Click Save

- A confirmation of the Issues creation will appear.
- Once the confirmation message closes, you will be directed to the IT Service Manager home page.

Open Existing Issue

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Step 2: Log in with your NetID and NetID password

- The IT Service Manager home screen will be displayed.

Step 3: Click the Issue Number

- The Issue will open in a new window. The home screen will remain open in the existing window and may be utilized, if necessary, to select a different Issue.

If the Issue is not visible in the My Assignments Issue List:

Step 3: Select the Issue List

- Click the list dropdown menu, select All Issues.

Step 4: Search for Issue

- Use the available criteria to search for the issue. Clicking on column headers (like Status or Assignees) will sort Issue data in an ascending or descending fashion.

Step 5: Click the Issue Number

- The Issue will open in a new window. The home screen will remain open in the existing window and may be utilized, if necessary, to select a different Issue.

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Update Issue To Change Assignment Group or Assignee

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Open Existing Issue

Step 3: Click the Issue Number
- The Issue will open in a new window, the home screen will remain open in the existing window and may be utilized, if necessary, to select a different Issue.

If the Issue is not visible in the My Assignments list:

Step 3: Select the Issue List
- Click the list dropdown menu, select All Issues.

Step 3a: Click the Issue Number
- The Issue will open in a new window, the home screen will remain open in the existing window and may be utilized, if necessary, to select a different Issue.

Change Assignment Group (if applicable)

Step 4: Update Description Field (Required)

Step 5: Click on the Assignees and Notifications tab

Step 6: Select new Assignment Group
- Clear text from Assignees field by selecting the current group name or Agent and clicking the left facing arrow.
- Select the appropriate Assignment Group.
- Click the right facing arrow to move the selection into the Assignees field.

Step 7: Click Save
- A confirmation of the Issue update will appear.
- Click Close Window.
- Once the confirmation message closes, you will be directed to the IT Service Manager home page.

Change Assignee

Step 4: Update Description Field

Step 5: Click on the Assignees and Notifications tab

Step 6: Select new Assignee

- Clear text from Assignees field by selecting the current group name or Agent and clicking the left facing arrow.
- Select the appropriate Assignment Group.
- Select the appropriate Agent from the Assignment Group.
- Click the right facing arrow to move the Agent selection into the Assignees field.

Step 7: Click Save

- A confirmation of the Issue update will appear.
- Click Close Window.
- Once the confirmation message closes, you will be directed to the IT Service Manager home page.

Update an Issue

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Open Existing Issue

Step 3: Click the Issue Number
- The Issue will open in a new window, the home screen will remain open in the existing window and may be utilized, if necessary, to select a different Issue.

If the Issue is not visible in the My Assignments list:

Step 3: Select the Issue List
- Click the list dropdown menu, select All Issues.

Step 3a: Click the Issue Number
- The Issue will open in a new window, the home screen will remain open in the existing window and may be utilized, if necessary, to select a different Issue.

Update an Issue

Step 4a: Update Status, Update Impact, Update Urgency (Optional)

Step 4b: Click on the Contact Information Tab (Optional)
- Update Contact Information as necessary.

Step 4c: Click on the Service Recipient Tab (Optional)
- Update Service Recipient information as necessary.

Step 5: Click on the Issue Information tab
- Enter new information into the Append New Description field.

Step 6: Click Save
- A confirmation of the Issue update will appear.
- Click Close Window.
- Once the confirmation message closes, you will be directed to the IT Service Manager home page.

Update Issue with Email Correspondence to Customer

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Open Existing Issue

Step 3: Click the Issue Number

- The Issue will open in a new window, the home screen will remain open in the existing window and may be utilized, if necessary, to select a different Issue.

If the Issue is not visible in the My Assignments list:

Step 3: Select the Issue List

- Click the list dropdown menu, select All Issues.

Step 3a: Click the Issue Number

- The Issue will open in a new window, the home screen will remain open in the existing window and may be utilized, if necessary, to select a different Issue.

Send Outgoing Correspondence

Step 4: Change the Status dropdown to Pending Customer

Step 5: Click on the Issue Information tab

Step 6: Enter a Message in the Append New Description box

- This text will be emailed to the end user. The end user can reply to the message to provide the requested additional information.

Step 7: Click Save

- A confirmation of the Issue update will appear.
- Click Close Window.
- Once the confirmation message closes, you will be directed to the IT Service Manager home page.

View Incoming Correspondence

Note: In the Issues List, Issues which have received an email response will have the status of "Customer Responded."

Step 1: Click the Issue Number

- The Issue will open in a new window, the home screen will remain open in the existing window and may be utilized, if necessary, to select a different Issue.

If the Issue is not visible in the My Assignments list:

Step 1: Select the Issue List

- Click the list dropdown menu, select All Issues.

Step 1a: Click the Issue Number

- The Issue will open in a new window, the home screen will remain open in the existing window and may be utilized, if necessary, to select a different Issue.

Step 2: Click on the Issue Information tab

Step 3: Review Customer Response

- The customers' response will be shown in the Complete Description box.
- Any attachments the customer has submitted will be located on the Attachments Tab.

Review Outgoing Correspondence

Note: The text of any previously-sent outgoing correspondence is contained in the Description log.

Step 1: Click the Issue

- The Issue will open in a new window, the home screen will remain open in the existing window and may be utilized, if necessary, to select a different Issue.

If the Issue is not visible in the My Assignments list:

Step 1: Select the Issue List

- Click the list dropdown menu, select All Issues.

Step 1a: Click the Issue Number

- The Issue will open in a new window, the home screen will remain open in the existing window and may be utilized, if necessary, to select a different Issue.

Step 2: Click on the Issue Information tab

Step 3: Review Previous Outgoing Correspondence

- Any correspondence sent by Agents will be shown in the Complete Description box.
- Each entry into the Description log is time stamped with Date, Time, and the Agent's name who submitted the response.
- Agents could also click on the History tab to see Issue history by clicking on the Email History Only link.

Complete an Issue

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Open Existing Issue

Step 3: Click the Issue Number

- The Issue will open in a new window, the home screen will remain open in the existing window and may be utilized, if necessary, to select a different Issue.

If the Issue is not visible in the My Assignments list:

Step 3: Select the Issue List

- Click the list dropdown menu, select All Issues.

Step 3a: Click the Issue Number

- The Issue will open in a new window, the home screen will remain open in the existing window and may be utilized, if necessary, to select a different Issue.

Complete an Issue

Step 4: Change the Status dropdown to Completed

Step 5: Click on the Issue Information tab

Step 6: Enter a Description in the Append New Description box

- This text will be emailed to the end user as the Issue's solution.

Step 7: Enter a Completion Code

- Select the Completion Code that best fits the status of the Issue at resolution (i.e. Why is this issue resolved?).

Step 8: Provide Internal Notes (Required)

- Enter technical notes on the Issue's resolution.

Step 9: Click Save

- A confirmation of the Issue update will appear.
- Click Close Window.
- Once the confirmation message closes, you will be directed to the IT Service Manager home page.

Search for an Issue

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Search for an Issue Using the Issue View

Step 3: Select the Issue List
- Click the list dropdown menu, select All Issues.

Step 4: Search for Issue
- Use the available criteria to search for the issue. Clicking on column headers (like Status or Assignees) will sort Issue data in an ascending or descending fashion.

Step 5: Click the Issue Number
- The Issue will open in a new window. The home screen will remain open in the existing window and may be utilized, if necessary, to select a different Issue.

Search for an Issue Using the Quick Search Bar

Step 3: Enter keyword(s) in the Search Field at the top of the Home Page

Note: The Quick Search Bar uses Boolean logical operators. Use 'AND' or 'OR' in between search words to return good matches. Example: To search for issues involving resetting a password, search for "Reset AND Password." Searching for "How do I reset my password?" will only return Issues with that exact wording in the Issue.

Search for an Issue Using the Reports Button

Step 3: Click the Reports button on the Toolbar

Step 4: Click New Report from the selection list

Step 5: Click the Issue Criteria Tab

Note: The Issue Criteria tab will contain most data fields that an Agent would need to use to search for tickets (fields like Title, Status, Assigned To, etc.).

Step 7: Enter Criteria or Select Choice from Dropdown menu

Step 8: Click Save/Run Tab

Step 9: Add a Report Name and click GO
- Depending on the report display options selected, your report will run and display.