

ZENworks Service Desk New End-user Portal Reference

November 2018



The information in this guide pertains to the new end-user portal. This guide provides an overview of the tasks that an end-user can perform in this new end-user portal.

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1 Overview

The new end-user portal enhances the overall user experience. Using this new end-user portal, customer can view and request a Store Item, report an Incident and view all Requests.

The new end-user portal can be accessed through any devices such as desktops, mobiles, tablets using the following URL:

IMPORTANT: https://<zenworks_service_desk_server>/servicedesk/

2 Store

The Store page enables you to view and request store items.

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- ◆ Section 2.2, "Searching the Store Item," on page 2
- ◆ Section 2.3, "Filtering the Store Items:," on page 2

2.1 Requesting a Store Item

To request a store item, click a store item and specify the following information, and then click **Request**.

- 1. Request Description:** Specify a description to define the request.
- 2. Additional Details:**
 - a. Line Manager:** This field is an auto-populated field. User cannot edit this field.
 - b. Location:** Specify the location from where this request is created.

c. **Preferred Contact Type:** Select the preferred contact type. This field includes Phone and Email.

- ♦ **Email:** If you select **Email** as the **Preferred Contact Type**, then specify email address in the adjacent field.
- ♦ **Phone:** If you select **Phone** as the **Preferred Contact Type**, then specify contact details and **Preferred Contact Time** in the respective fields.

3. **Attachment:** If you want to provide any attachments with this request, you can either drag and drop the attachment or click the Attachment field, and then upload the required fields.

Any number of attachments can be added to a request, but each file should not exceed 100 MB in size.

NOTE: The Additional Details section can be enabled or disabled in **Setup > Privileges > Customers > Show Additional Information**.

2.2 Searching the Store Item

To search a store item:

- ♦ In the search bar, located in the banner, specify the keyword and click the search icon.

2.3 Filtering the Store Items:

To search required Store Item, you can use the either the filter or search option provided in the portal.

In the left hand side of the store page perform the following actions to filter the Store Item:

1. Select the required store item, whether its **Requested**, **Not Requested** or **Both**.
2. In the **Categorization** section, select the categorization to which the store item belongs.
This field is populated based on Categorization available in **Store Setup > Store Categorization**.
3. In the Item Type section, select or search for the type of the store item.
This field is populated based on types available in **Configuration > Types**.
4. After specifying all the fields, click **Apply**.

NOTE: Filter can be applied on the searched store items.

3 Reporting an Incident

Customer can report an incident from any page.

To report an incident, perform the following:

1. Click the Report an Incident button.

IMPORTANT: This button is enabled only when Administrator has selected **Create** or **Create And Edit** in the Incidents, Change Request or Service Request fields.

2. In the **Subject** field, specify the subject for this incident.

By default, the Incident field is disabled. To enable this field, click **Setup > Privileges > Customer > Show Subject Field**.

3. Specify a description for the incident.

4. Select the Item Category.

After selecting Item Category, following fields are displayed:

- ◆ Item Type
- ◆ Item

5. Specify the following Additional Details:

- ◆ **Location:** Specify the location from where this request is created.
- ◆ **Preferred Contact Type:** Select the preferred contact type. This field includes Phone and Email.
 - ◆ **Email:** If you select **Email** as the **Preferred Contact Type**, then specify email address in the adjacent field.
 - ◆ **Phone:** If you select **Phone** as the **Preferred Contact Type**, then specify contact details and Preferred Contact Time in the respective fields.

6. **Attachment:** If you want to provide any attachments with this request, you can either drag and drop the attachment or click the **Attachment** field, and then upload the required fields.

Any number of attachments can be added to a request, but each file should not exceed 100 MB in size.

NOTE: The Additional Details section can be enabled or disabled in **Setup > Privileges > Customers > Show Additional Information**.

4 My Profile

As a customer, you can view and update your account information in the My Profile page.

1. In the top right-hand corner of the New End-user Portal, click your login name, and then click **My Profile**.
2. In this page, you can update details such as **Email** and **Password**.

NOTE: If the system is synchronized with an authentication server, user cannot modify any information in the My Profile page.

5 Requests

The Requests page displays all the requests. In the request page, you can perform following actions:

- ◆ [Section 5.1, “Viewing Request Details,” on page 4](#)
- ◆ [Section 5.2, “Action on a Request,” on page 4](#)
- ◆ [Section 5.3, “Searching Requests,” on page 5](#)
- ◆ [Section 5.4, “Sorting Requests,” on page 5](#)

5.1 Viewing Request Details

To view details of any request, click the request that you want to view. Depending on the device type and resolution, following details are displayed:

- ◆ **Subject:** Displays the subject of the request that was specified while creating the request. This is a configurable field that can be enabled or disabled. To enable or disable Subject, login as a Admin, click **Setup > Privileges > Customer > Show Subject Field**.
- ◆ **Request:** The request ID and request type icon. The request can be Incident, Service or Change.
- ◆ **Item Type:** The Item Type on which the request was created.
- ◆ **Item:** The item number for which the request was created.
- ◆ **Created On:** The time stamp when the request was created.
- ◆ **Status:** The current status of the request.
- ◆ **Technician:** The name of the technician to whom this request is assigned. This is an optional field that can be enabled or disabled. To enable Technician field, login as a Admin, click **Setup > Privileges > Customer > View Technician**.

5.1.1 Expanding a Request:

Click the request to expand it. Following are the fields that are displayed after expanding a request:

- ◆ **Open Date:** The timestamp when the request was opened.
- ◆ **Closed Date:** The timestamp when the request was closed.
- ◆ **Priority:** The priority of the request. A request can have high, medium or low priority.
- ◆ **Classification:** Displays the to which class this request belongs.
- ◆ **Item Category:** Displays to which item category this request belongs.
- ◆ **Room:** Room assigned to the Customer.
- ◆ **Requested By:** Displays who created this request.
- ◆ **Description:** Description that was specified while creating the request. Click more to view the complete description.
- ◆ **Notes:** Notes added for this request. Multiple notes can be added for a request.

5.2 Action on a Request


Depending on the privileges and roles, any of the following actions can be performed:

- ◆ Add Note
- ◆ Approve
- ◆ Reject
- ◆ Escalate
- ◆ Deescalate
- ◆ Resolved
- ◆ Reopen

To reopen a request, the privileges must be set to **Allow Reopen** in **Customer Privileges**.

NOTE: To perform actions on a request, the privileges must be set to **Create and Edit** or **Edit**

To perform an action on a request:

1. Click , and select the required action.
2. (Optional) In the **CC** field, specify an email ID to whom you want to notify. This field auto suggests email IDs based on the specified characters.
3. Specify a reason in the **Note** field.

Note: While approving a request, Note is an optional field.

NOTE

1. All the notes on a request are stacked, and the latest note is displayed on top of the list.
 2. After collapsing the request, all the attachments in a request can be downloaded by clicking the attachment icon.
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5.3 Searching Requests

To search a request:

- ◆ In the search bar, located in the banner, specify the keyword and click the search icon.

5.4 Sorting Requests

Requests can be sorted based on various fields and can be sorted in ascending or descending order. The sort operation can be performed on the searched results as well.

To sort requests:

- ◆ On the right-top of the request page, click the **Sort By** drop down, and select required field. The available options are **Recent**, **Request**, **Request Type**, **Item**, **Created On**, and **Status**.

NOTE: To sort request ascending or descending, click the adjutants to the Sort By field.

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